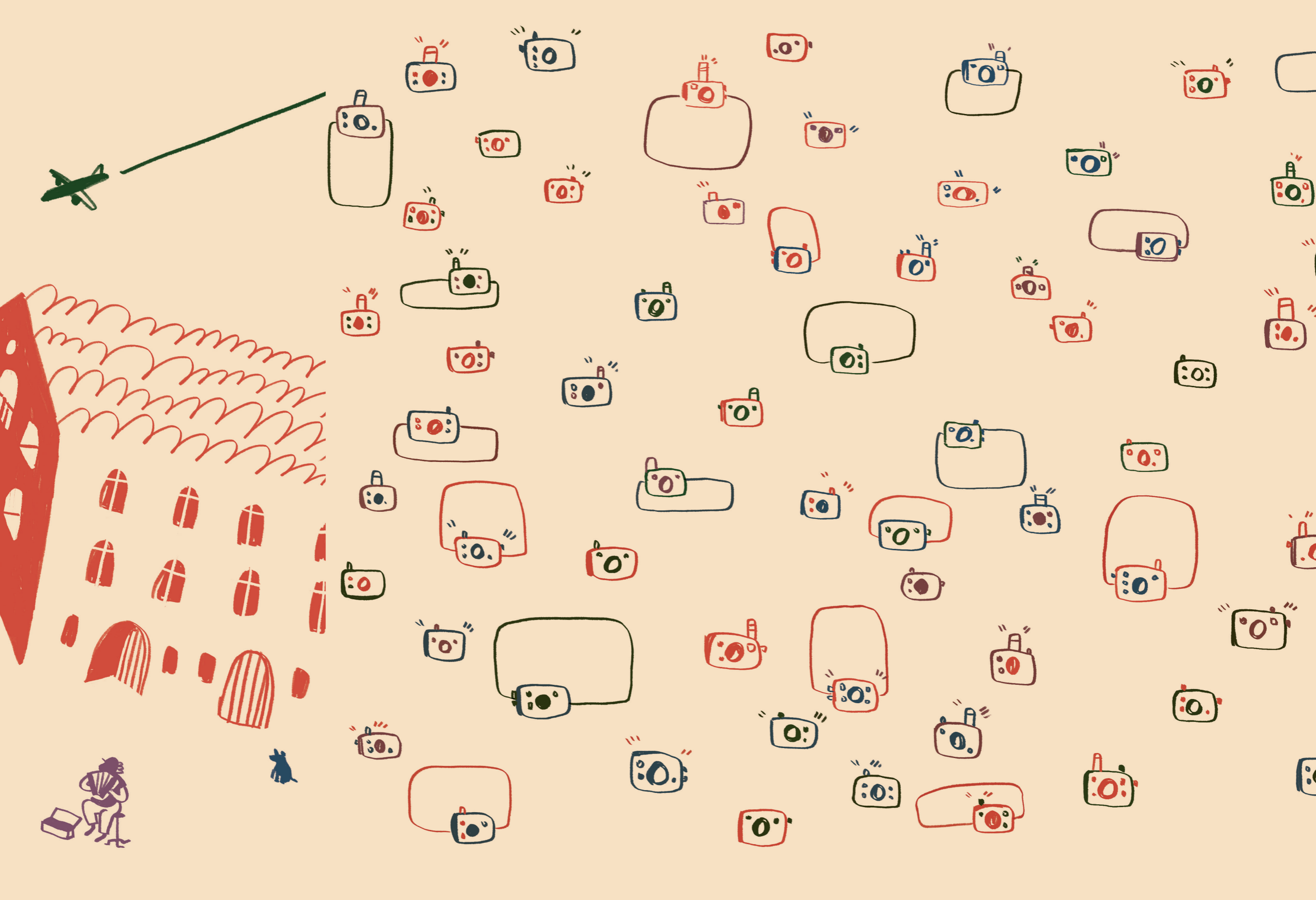


# URBAN TOURISM IN SLOVENIA

## Characteristics and Governance

editors  
Naja Marot and Matjaž Uršič







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## Urban Tourism in Slovenia: Characteristics and Governance

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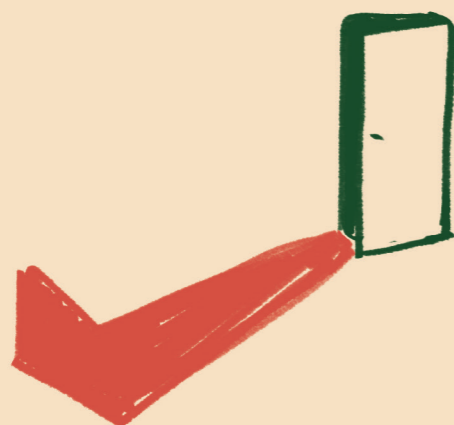
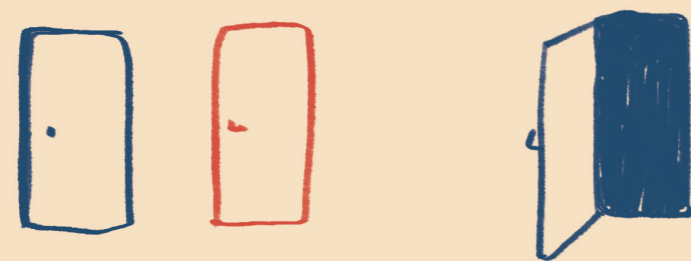
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## Chapter 1

### Introduction

Naja Marot and Matjaž Uršič



***To awaken quite alone in a strange town is one of the most pleasant sensations in the world.***

*(Freya Stark)*

Urban tourism has become one of the main types of tourism of the 21<sup>st</sup> century, both globally (UNWTO, 2020) and in Slovenia (Grah, Dimovski in Peterlin, 2020). The index of growth of arrivals for the period 2010–2019 is, of all types of tourism, highest in Ljubljana (262) and other city municipalities (236 altogether; SURS, 2022). Urban tourism, traditionally seen as cultural tourism, started to grow rapidly in 2010. In the last ten years we observed the growth of low-cost airlines, the shared economy in accommodation provision, and the digitalisation of tourism; all significantly contributed to the leap in arrivals and overnight stays in urban destinations (Shoval, 2018). If at the end of 20<sup>th</sup> century we had traditionally visited European capitals like London, Vienna, and Paris because of their cultural attractions, now, in the 21<sup>st</sup> century, interest has shifted to other destinations. These destinations, which beforehand were not really touristy, nowadays attract tourists because of their urban architecture, public open spaces and lifestyles. Here, we consider the cities with 100,000 to 1 million inhabitants, which, especially due to low-cost travel, have become easily accessible, have been more heavily promoted and have, as a consequence, become more attractive to tourists. The European Union has, with the establishment of the free market, sped up mobility for work or study which contributed to formulation of the so-called “VFR tourists”, meaning tourists who visit friends and relatives living in another country or city for work or study. In this context, middle-size or, at a European scale, smaller cities such as Ljubljana are flourishing; the city combines the functionality of a capital city with a strong presence with regards to educational, research, and event sectors, as well as with reference to specific geolocation strengths.

In the period 2010–2019 arrivals to Ljubljana almost tripled (from 430,155 in 2010 to 1,127,904 in 2019, SURS, 2022). Similarly, overnight stays tripled (from 841,220 in 2010 to 2,227,669 in 2019; SURS, 2022). This growth was not only visible in statistics, but also within the city: in the tourist flows in the city core, through the growth of investments in accommodation capacities, and especially in the sector of the shared economy and new tourist products; furthermore, capacities found in other European cities. These economic, social, and spatial changes need to be inspected thoroughly in research. As a multidisciplinary group of researchers we have addressed a number of goals within this project which is focused on the growth of urban tourism in Slovenia. The research was financed by the Slovenian Research Agency, shorter ARRS. The first attempt to get financing was not successful, however, we managed to succeed in the 2019 call. We acquired financial resources for a research project entitled “**Analysis of territorial and social impacts on the urban tourism and its territorial governance: the cases of Ljubljana, Graz and Maribor**”<sup>1</sup>, abbreviated to MESTUR. For

<sup>1</sup> Austrian research agency FWF has not decided to finance the project, so in the end Graz was not investigated. However, due to the rules of ARRS, we needed to keep the city name in the project title.

implementation of the project we gathered an interdisciplinary team of spatial planners, geographers, economists, sociologists and landscape architects from University of Ljubljana and University of Maribor. In so doing, we combined knowledge from the various fields required to answer the research questions of the project.

The particular focus of this monograph and the project was the socio-spatial dimensions of urban tourism. With regard to the spatial dimension we have in mind the physical spatial elements of the city which are relevant to tourists such as infrastructure (signalisation, parking, transport), the density and spatial distribution of tourism attractions, accommodation, and the gastronomy sector. With regard to the social dimension, we intended to look at, neglected “softer” (non-material) dimensions of impacts in the territory. The research shows that these dimensions particularly have great impact on how resilient and sustainable urban tourism is or could be (for more see Thornton, 1997; MacCannell, 1999; Uršič and Imai, 2020). As part of the social-spatial dimension the behavioural patterns of tourists that affect tourist flows in space are also considered. With the help of multilayer analysis of the different dimensions of tourism and spatial distribution of infrastructure we can divide city areas into more and less pressured ones when it comes to urban tourism (Lew and McKercher, 2006; Popp and McCole, 2016).

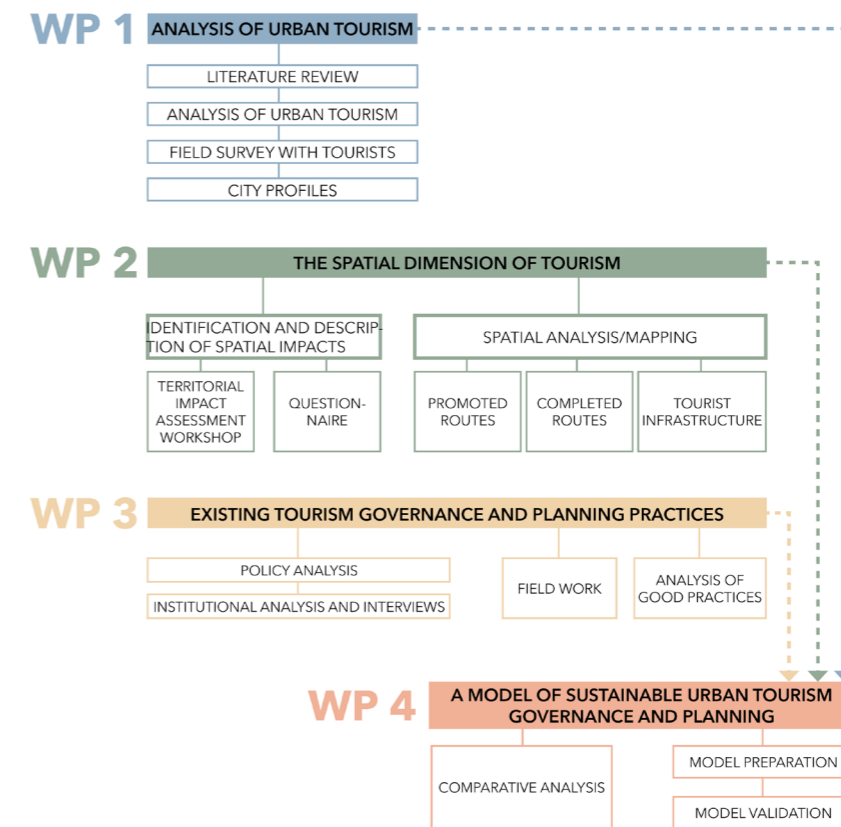
The MESTUR project and this monograph addressed two major research questions:

- 1) What are the territorial and social impacts that urban tourism cause in cities?
- 2) What (if any) solutions are spatial planning and tourism management currently offering to address these impacts and what could they offer in the future?



**Figure 1.1**  
Selected topics of the research in urban tourism

When framing the research, we considered the scheme of Ashworth and Page (2011) which defined various themes of research in urban tourism (see Figure 1.1). The project addresses six of these topics: infrastructure, governance, planning, impacts, sustainability, and models and case studies of the cities. The answer to the first question was provided via analysis of the characteristics of urban tourism which included defining types of tourism and tourists and inhabitants' views of tourism. The results of this analysis was joined with the so-called city profiles which are presented in Chapter 3 for Ljubljana and in Chapter 4 for Maribor. The basic analysis of urban tourism was undertaken in Ljubljana and Maribor, and their competitor cities in Central Europe, including Graz, Torino, Padova, Bratislava, Zagreb, Zurich, Poznan, and Leipzig. The cities for comparison were selected on the basis of their possessing similar scopes and scales of tourism as those of the case study cities and on the basis of available data (in the annual report of European Cities Marketing Association, 2018). Results of this analysis are summarised in the first chapter on urban tourism. As illustrated in the title of the project, the WP2 was dedicated to the spatial analysis of the impacts and distribution of urban tourism. The impacts were identified with the so-called Territorial Impact Assessment which represents the first attempt to use this method for urban tourism. The outcome of this assessment was that the lack and non-accessibility of data requires substantial engagement by researchers and can limit the outcomes of such assessments. Results of this analysis are presented in Chapter 5, in which we described short overview of existing impact assessments and their use for the assessment of impacts caused by tourism. The spatial dimension is described in more into detail in Chapter 6. This chapter also provides conclusions about the research upon the connections between the promotion of tourist sights via guidebooks, on-line portals, and tourists' movement around the city. For this purpose, we prepared cartographic representations of the frequency of the promotion of individual sights, hotels, services and tourist paths in the cities of Ljubljana and Maribor. Later, we also asked the tourists in the survey about the locations they visited, and how they orient themselves when walking around the city. They also reported where they had already been; already from which we have generated data on the density of tourist flows in Ljubljana. The survey consisted of 26 questions, and was undertaken in Slovene and English language versions. The aim of the survey was to differentiate between different profiles of urban tourists who had visited both cities, and to determine in what way these two destinations are different from the other urban destinations. In Ljubljana, around 600 tourists participated in the survey, in Maribor there were 63 respondents. Their answers were collected at different locations in the centre of Ljubljana (for example, Kongresni trg, Ljubljanski grad, Tržnica, Prešernov trg in Tromostovje) and Maribor (e.g. Poštna ulica, Lent, Mestni park).



**Figure 1.2**  
Working scheme of the MESTUR project (Author: Barbara Kostanjšek)

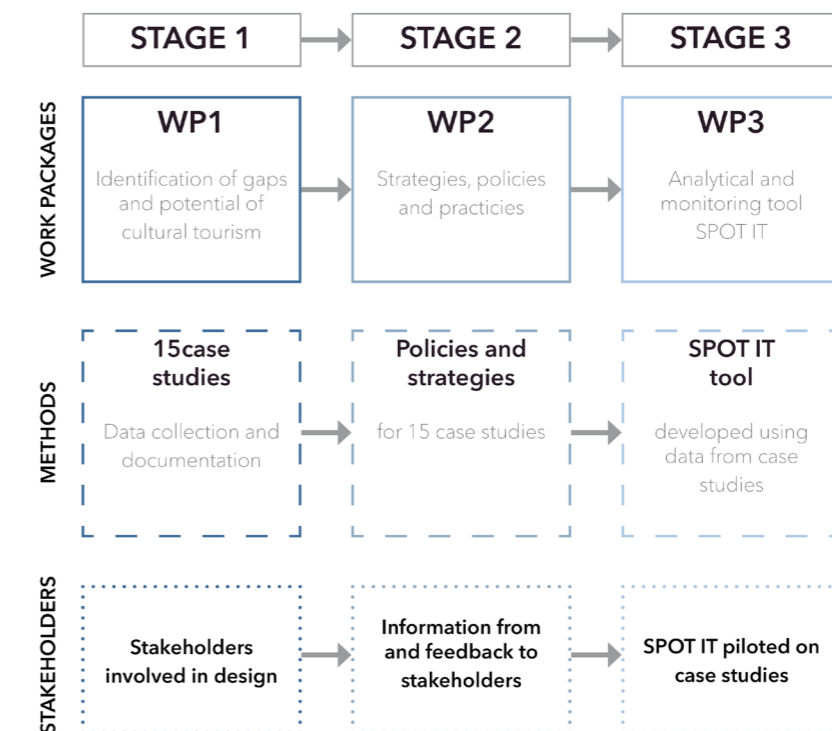
In the project we put a special emphasis on the governance aspect of tourism. Governance has been one of the main research topics of social research in the 21<sup>st</sup> century. In the field of spatial planning we talk more precisely about territorial governance and have examined which activities are more connected to spatial management broadly and not only as planning. Instead, we looked at it more broadly, as an analysis of stakeholders included in spatial planning, and processes, and influenced by society, politics and economy. We talked more about connecting sectors and so-called integrative spatial planning which seeks better co-operation between sectors and co-operation in the preparation and implementation of strategic policies. Potentials for connecting tourism and urban planning were elaborated upon in 2008 by Bosley and Brothers (2008). The concept of integration, meaning “connecting and participation” has entered into the terminology of spatial planning in the last 10 years (most references are dated from 2005 onwards) and this is likely to have been connected to environmental planning and policy analysis (Weingarten, 2010; Fischer et al., 2013; Tajima and Fischer, 2013). Integration in planning theory derives from communicative (Innes and Booher, 1999, 2004), participative (Healey, 2005), and co-evolutionary planning (Boelens and de Roo, 2016; Mees et al., 2016). All types of spatial planning put into focus co-operation with stakeholders and seek to establish dialog between them. Dialogue contributes to the development of joint solutions. Thus, in the MESTUR

project we prepared a governance model, which was aimed to illustrate the possibilities for better integration of tourism and spatial planning. As stated in the report of the ESPON COMPASS project (ESPO, 2018) which dedicated to territorial governance and systems of spatial planning in Europe, the tourist sector currently has neutral impact on spatial planning. Furthermore, there were doubtful claims that tourism is as a sector which, at the local level, was already connected to planning. For Slovenia, the report identified a low level of integration, while planning was recognised as mostly irrelevant to tourism.

In the light of the recent growth of urban tourism, cities have developed various measures to improve governance practices in the field of tourism (UNWTO, 2019). These measures were evaluated in the context of selected destinations in our study. In Chapter 8 we introduce the territorial governance of tourism which was first used to identify the state of tourism and territorial governance in Ljubljana and Maribor. Afterwards, solutions were sought for identified problems. The model concerns inhabitants and stakeholders in spatial planning and urban tourism. The basis of the model is general and, therefore, can be applied to other cities. In the context of the project, we also tested the model on Novo Mesto and Celje. In addition to the spatial aspect, this monograph also covers social aspects of urban tourism. The pressures of urban tourism not only bother local inhabitants, but also some of the tourist who in the survey already identified some places in the city centre as overcrowded (Romao et al., 2018; Namberger et al., 2019; Novy and Colomb, 2019). Simultaneous to the recent rapid growth of tourism arrivals and overnight stays that resulted in economic benefits for Slovene society, we can also identify profound structural changes to tourism. These structural changes signal about the potential depletion of heterogeneity in the offer of cultural tourism offer in cities. Creating generic tourist offers in Slovenian cities and towns could, in the long term, potentially lead to a lowering of urban qualities of life. In Ljubljana and Maribor such an impact cannot yet be depicted. However, Ljubljana inhabitants have become less welcoming to tourist activities. Previously, tourism was seen as an added value to the city (livelier cultural and gastronomy offer); but in 2019 minor worries were expressed with regard to the rapid growth of the sector (Marot et al., 2019). The view of tourists and inhabitants regarding this growth and its relevance for society is elaborated upon in Chapter 7.

Cultural tourism and social aspects of tourism were also the subject of investigation in the **SPOT project**, financed by the horizon 2020 programme. The project was entitled, "**Innovative and social platform on cultural tourism and its potential towards deepening Europeanisation**", was started in January 2020 and represented another source of contributions for this book. The organisation of work in this project is visible from Figure 1.3. Although the focus of the project was on cultural tourism and its changes in the 21<sup>st</sup> century, its contribution to this monograph originated from the survey that was carried out in summer 2020 and included tourists, inhabitants and tourism suppliers.

The survey had a standardized form, however, some of the questions were different depending on the target group. For example, the survey for tourists consisted of 28 questions, and the emphasis was on the evaluation of cultural offers and tourism experiences in Ljubljana as an urban destination. In total 100 tourists answered the survey of which 26 were domestic tourists and 74 were foreign tourist; a proportion that corresponds to the nationality-diversity of tourists in the city. The survey for inhabitants had more emphasis on evaluating the added value of tourism for local inhabitants and thus it also included financial and cultural aspects, together with analysis of the interactions between tourists and inhabitants. Answers to 24 questions were collected via the on-line panel provided by the Valicon company. Altogether 306 inhabitants responded. A survey with companies which included 39 questions was the most difficult to carry out; especially because of the pandemic which meant that many tourism suppliers were not willing to participate. Altogether, we gathered 40 respondents, of which 13 were accommodation suppliers, 12 were representatives of tourism attractions, 13 were of other types (a guide, tourism agency and so on), and two were providers of gastronomy. In addition to information about their functions and roles in cultural tourism, the suppliers also elaborated on how they had adapted their services due to the pandemic (Klepej et al., 2021).



**Figure 1.3**  
Scheme of working steps in project SPOT



Year 2020 because of the pandemic significantly marked the work in both of the projects and certainly needs to be mentioned in this introduction chapter. This was the year in which the pandemic started and it not only interfered with the health of the people, but also strongly influenced the tourism sector as described in this book. Tourism became 'extinct' overnight, tourism suppliers lost all their clientele, and tourists were forced to stay in their homes. Not only was travel limited, but was also, for a time, forbidden. Researchers needed to face this reality and adapt their research agenda accordingly. We were forced to partially change the research plan, and months of May and June 2020 were dedicated to investigating the impacts of pandemics and the closure of the countries in spring 2020. This was done with the help of interviews with the stakeholders and was undertaken either on-line or via phone conversations. The suppliers mostly reported how unprepared they were for such a decrease in tourism activities. Altogether, we interviewed 12 representatives from the field of tourism (4 tourism suppliers, 3 tourism organisations, 2 representatives of the municipalities, and one representative from regional development agency, research institution and creative sectors) and each answered eight questions. We discovered that although there has been resilience present in the spatial planning over the last few years (see for example Desouza and Flanery, 2013), existing spatial and tourism strategies do not foresee measures for such scenarios. This was certainly an important input for the preparation of the already mentioned governance models (Klepej and Marot, 2021). In addition, the results of the surveys that were performed in this challenging time, did not resemble the same picture of tourism as they would have done in 2018 because the manner of travel had significantly changed. In the project SPOT we have asked tourists, inhabitants, and suppliers in 2020 about the cultural offers and adaptation of the sector between the pandemics, while in MESTUR we carried out the already mentioned field survey in 2021. The aim of this survey was to find out how tourists move around, what they visit, how and where they get information, and what motivates them to visit Ljubljana, Maribor and elsewhere. The results showed that more and more individual tourists were coming to the cities who are interested in its open spaces and architecture. It was also clear that intercontinental tourists had disappeared from European cities overnight. Some, particularly cities burdened with tourism activities, saw this as a welcome change in which they were able to recuperate from the high density of tourists that they usually experience (see Seraphin and Dosquet, 2020). Although the pandemic has strongly affected the implementation of both projects and some results of it are presented in this monograph, no separate chapter is dedicated to this topic. Instead, the topic of the pandemic is integrated into the content of individual paragraphs where appropriate. In the final chapter of the book the reader will find an English abstract, a presentation of the authors, and a dictionary; the latter prepared so that there is a common understanding of terminology in the field of urban tourism.

**To conclude, we would like to wish you joyful reading of the publication. Through it we wish to shed light on the phenomenon of urban tourism and its new reality. Last but not least, the text is also intended to produce critical reflection and to fill the existent gap in research on this topic in both Slovenia and Central Europe.**

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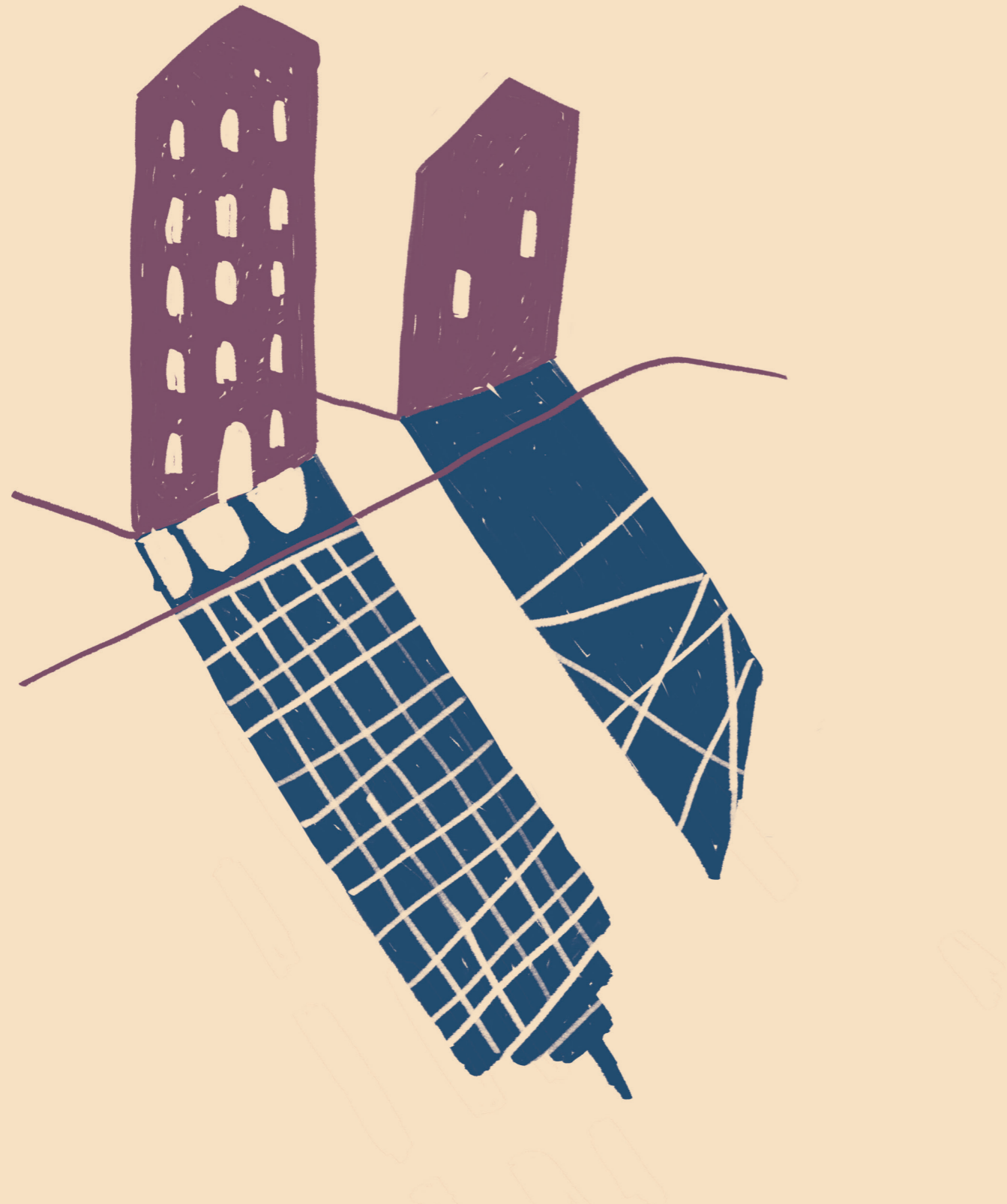
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## Section A

### Urban tourism as a type of tourism







## Chapter 2

### Urban tourism in the 21<sup>st</sup> century

Naja Marot and Nina Stubičar

**Tourism has become a key contributor to the economic, social and cultural transformation that has marked the world's cities over the past two decades.**

(Fainstein and Judd, 1999, p. 261)

## 2.1 The development of urban tourism

The origins of tourism date back to the early days of human history when people first expressed their needs and desires to change their place of residence. Urban tourism could be said to be as old as the ancient cities, or even older, going back to prehistoric times. An example of ancient urban travel is a visit to Babylon to see the hanging gardens and other achievements of civilisation. Later, during the classical period and given cultural progress, the purpose of travel changed. People visited great architectural masterpieces, learned about new cultures and languages, and explored the cuisine of different regions. Especially in coastal areas, the Romans developed spas and health resorts intended for relaxation (Christou, 2022). In the Middle Ages and the early modern period, urban tourism took on a new dimension in the form of grand tours. Grand tours were taken by English aristocrats who explored the European continent in the period 1550–1850, educating themselves about European political and religious life, daily life at court and social customs. As Mary Shelly wrote in her book "History of Six Weeks" (Shelley, 2015, new edition), they were particularly interested in their interactions with European culture and its influence on their creativity and personal development. The purpose of such tours was education and enjoyment. Tours as a new mode of travel mainly included Mediterranean cities such as Naples, Rome, Vienna, Paris or Florence, major European cities at the time (Towner, 1984).

The Industrial Revolution greatly influenced the life style of people by introducing a separation between work and residence. It was a time of accelerated urban growth and development. London doubled its population in the 19<sup>th</sup> century, from two million in 1851 to four million thirty years later. In connection with industrial development, world exhibitions were organised mainly to promote the industrial and colonial powers and the ideology of capitalism. The first such exhibition was organised in London, followed by the rest of the major European cities (Paris, Turin, Brussels and others). The development of the automobile before the First World War reinvented the mode and capacity to travel. While WWII stopped tourism activities for almost a decade, the rebuilding of society after the war brought welfare and a change of lifestyle at the end of the 60s (Sezgin and Yolal, 2012). More free time, better income, and the production of various products resulted in the emergence of mass tourism. However, in the 1960s and 1970s, tourists were predominantly concentrated in coastal and mountainous areas. In this period, cities were not prone to mass tourism for a number of reasons:

they were polluted due to industry, and the quality of living was too low for people to spend extended holidays there.

Pollution and economic and social processes forced cities to transform and rebuild themselves in the mid-1980s (Butler, 2015). In North America and Europe, the renewal process of cities and their historic centres focused on activities such as the recreation of images of cities, the construction of new infrastructure, and functionally and architecturally refined buildings such as stadiums, conference centres, hotels, museums, fairgrounds and so on. High investment in urban renewal improved the physical appearance of the area and the overall attractiveness of the cities, a major advantage for this developing type of tourism. Degraded urban areas offered the opportunity to develop their property markets, whilst historic towns and neighbourhoods strengthened their economies by exploiting culture, history and heritage (Verbeke and Lievois, 1999; Ashworth and Tunbridge, 2000). As a result, existing urban activities (service, commercial, etc.) were upgraded, and renovated parts of towns and cities were enriched by new green infrastructure, such as parks and cycle paths (Verbeke and Lievois, 1999; Ashworth and Tunbridge, 2000). Shopping malls or entertainment venues have been built in former industrial halls. One of the first examples of such a redevelopment project is the Albert Dock and its waterfront area in Liverpool, UK (Couch and Farr, 2000). The area of the former docks has been completely redeveloped and given new functions, including tourism, thanks to local initiatives and cooperation with the private sector. The city's culture, history and unique look were all used to redevelop the site, making it one of the UK's main tourist attractions and a best practice example for all of the following redevelopment projects; Potsdamer Platz in Berlin (Wojnarowska, 2011), Hafencity in Hamburg (Swierczewska-Pietras, 2015), the harbour area in Belfast (Muir, 2013) and others.

**Figure 2.1**

Images of European city destinations Hamburg (left) and Oslo (right) (Author: Naja Marot)



The redevelopment of degraded areas was just one of the impulses behind the revival of urban tourism at the end of the 20<sup>th</sup> century. In addition to redevelopment areas, tourists at that time still traditionally relied on cultural tourism, including visits to the capitals of countries rich in cultural heritage, with museums and galleries. Among the primary destinations (Table 2.1) in Europe are Vienna, London, Paris, Prague, Barcelona, and others. These cities were also the most affected at the beginning of the 21<sup>st</sup> century, when interest in them exploded due to factors such as: the emergence of low-cost airlines; accommodation, provided by the sharing economy concept; student exchanges; interest in weekend breaks; and the development of online booking portals, as well as the remaining digitalisation of supply and communication (Bock, 2015; Nientied, 2020). On average, the number of visitors to cities in the 21<sup>st</sup> century is growing at an annual rate of 5% (Figure 2.2), but according to data from the European Cities Marketing association, the cities with the highest demand are also recording growth rates of 10-15% per year. For example, Amsterdam, Berlin and Madrid recorded a change of 15% between 2009 and 2010 (Heeley, 2011). The growth of tourism in Ljubljana is fully comparable with European trends, with the number of overnight stays more than doubling between 2010 and 2017 (from 739,453 to 1,548,487), and the share of overnight stays increasing by 16% between 2016 and 2017 (SURS, 2019).

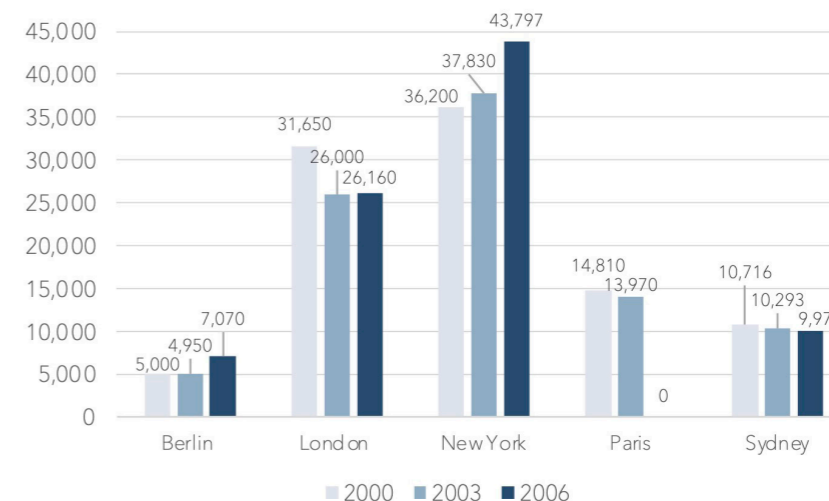
**Table 2.1**

Arrivals to major European destinations in 2006 and their change compared to year 2000 (Source: Heeley, 2011, p. 26, original source: ECM, 2006)

	Arrivals (mio)	Change of arrivals between years 2000 and 2006 (in %)
London	26.2	-16
Paris	16.3	11
Rome	11.1	77
Madrid	8.6	50
Barcelona	7.2	99
Berlin	7.1	41
Dublin	5.7	33
Amsterdam	4.7	16
Vienna	4.4	24
Munich	4.4	17

Cities today are establishing smart city governance and sustainable resource management with the intention of increasing their resilience to unpredictable events (Panasiuk, 2021; Hua and Wondirad, 2020). At the same time they are also supporting tourism as a sector that contributes significantly to their economic prosperity. As a result, new tourism infrastructure is being built, including hotels, venue facilities and airports of regional importance. The significant increase in the number of future visitors has increased the pressure on certain parts of cities, such as old historic cores (Garcia - Hernandez, de la Calle - Vaquero and Yubero, 2017; Martinez - Garcia, Raya - Vilchez and Gali, 2018), which have become heavily touristified. The term 'touristification' refers to 'the impact of tourism on the environment, the socio-cultural changes of a given place, the changes in the habits and customs of local people' (Renato, 2019). This

process is evident in high property prices, the limited range of services predominantly available to tourists in urban centres, the high proportion of housing available only for short-term rentals, and the increased flow of people on the streets during tourist seasons. Several authors (Seraphin, Sheeran and Pilato, 2018; Walmsley, 2017; Milano, Novelli and Cheer, 2019) have called this phenomenon 'overtourism', but some authors have also expressed scepticism about the term (Koens, Postma and Papp, 2018), as the complexity of urban organisms makes it difficult to distinguish whether the effects are caused by tourists or residents.



**Figure 2.2**

Tourist arrivals in the period between the years 2000–2006 (Source: Maitland and Newman, 2014, p. 8)

In 2020, the issue of overtourism in cities became obsolete overnight due to the pandemic that started in most countries in March 2020. The cities emptied overnight and this occasion represents the last major development point of urban tourism. As reported by Anguera - Torrell et al. (2021), all major urban destinations have lost significant numbers of tourists; urban tourism as an economic sector has suffered significant setbacks. According to Koh (2020), the pandemic caused an immediate transition from a state of overtourism to a state of no tourism. Whereas cities were previously bustling with life and presented a major magnet for tourists, they now receive far fewer tourists, and their origin is predominantly European (Šauer et al., 2021; Clois, 2021). As can be seen in Chapter 3 on urban tourism in Ljubljana, the number of tourists in Ljubljana has returned to what it was in 1975. Some cities, such as Paris, are even reporting having lost a larger number of residents; the French capital has lost as much as 10% of its population. Residents have moved to their holiday homes in the countryside, as this offered them a better quality of life during the lockdowns (Seraphin and Dosquet, 2020). The same is reported from Sweden (Aberg and Tondelli, 2021). In this situation, cities have had to find new target groups of visitors - shifting towards domestic tourists - and approach the development of new tourism products (Pasquinelli et al., 2021; Kunzmann, 2020; Kowalczyk - Aniol et al., 2021). How they have done this is described at the end of this section.



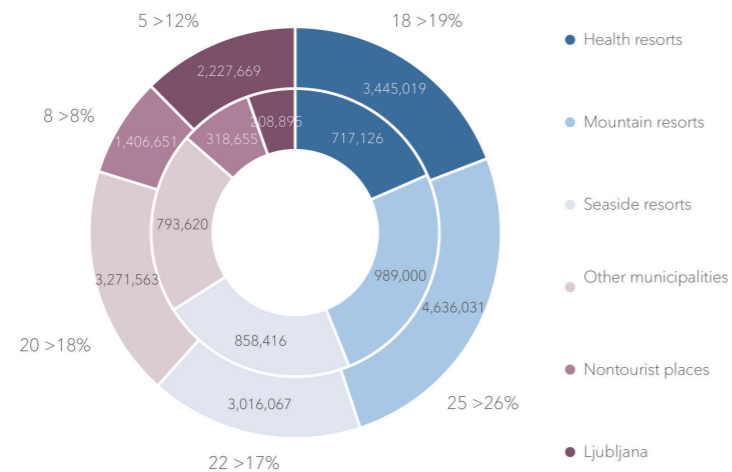
## 2.2 The development of urban tourism in Slovenia

Before the 20<sup>th</sup> century, Slovenia did not have well-developed urban tourism, as the first types of tourism were not directly linked to cities. Before the 19<sup>th</sup> century we can speak of pilgrimage tourism, spa, mountain, and coastal tourism. While the period before 1960 was characterised by the development of tourism linked to specific locations with natural resources, such as Rogaška Slatina, Bled, Portorož, economic and social prosperity accelerated the development of other locations and other types of tourism as well (Jeršič, Vojvoda and Vogrin, 1985). In the 1960s and 1970s, towns and cities became more attractive as transit points, and for business and conference tourism. Moreover, cities were 'showcases' of the new social order and economic performance. Increased motorisation enabled residents to travel individually to cities for day trips during the week or at weekends, or to visit them via organised travel. In addition to contributing to the increased quality of life of the population, tourism has been recognised by the state as an important economic sector (Banaszkiewicz et al., 2017; Yeomans, 2010). As a result, the state supported investments in tourism infrastructure and improvements to the quality of tourism services on a larger scale. Most of the major hotels in Slovenian cities were built at that time. Tourism as a topic of study also entered the university education system in the same period: firstly, at the University of Maribor in year 1960, and secondly, at the University of Ljubljana in year 1962. Tourism was not studied as a major, instead tourism-related topics were integrated into the study of economics and geography (Klepej and Marot, 2021).

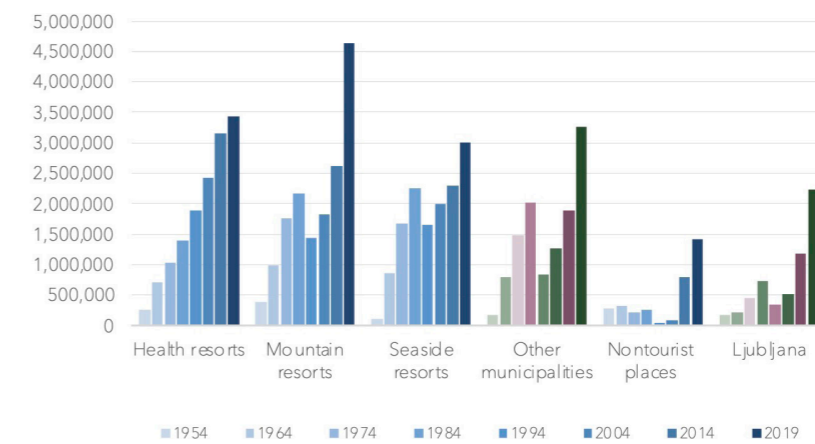
Overall, the number of beds in cities increased by 150% between 1960 and 1985, to an average of 2,000 beds per year. This is higher than the current trend, as Ljubljana saw an increase of less than 1,000 beds from 2014 to 2018 (ECM, 2019). Investment and increased international cooperation between cities meant that in 1985, 16% of all foreign visitors to Yugoslavia visited the capital cities of the federal states (Gosar, 1989).

**Figure 2.3**

Share of overnight stays by type of tourist destination - comparison between years 1964 and 2019 (Source: SURS, 2021a)



Statistical data confirms that Slovenia is building its tourism industry through its high diversity of landscapes and offers. Figure 2.3 shows that the importance of urban destinations, with the exception of Ljubljana, has not changed much in Slovenia since the 1960s, with the share of registered overnight stays having decreased slightly. In contrast, the share of overnight stays in Ljubljana out of all overnight stays in Slovenia has more than doubled, from 5% in 1964 to 12% in 2019. In terms of the categorisation of tourist destinations, only health resorts have seen a steady increase; they have a higher share of domestic visitors. All other destinations, however, have experienced a decline since the independence war. After a slow recovery, Slovenia - as elsewhere in the world - saw a major leap in urban tourism development after 2000 (SURS, 2021), as can also be seen in Figure 2.4.



**Figure 2.4**

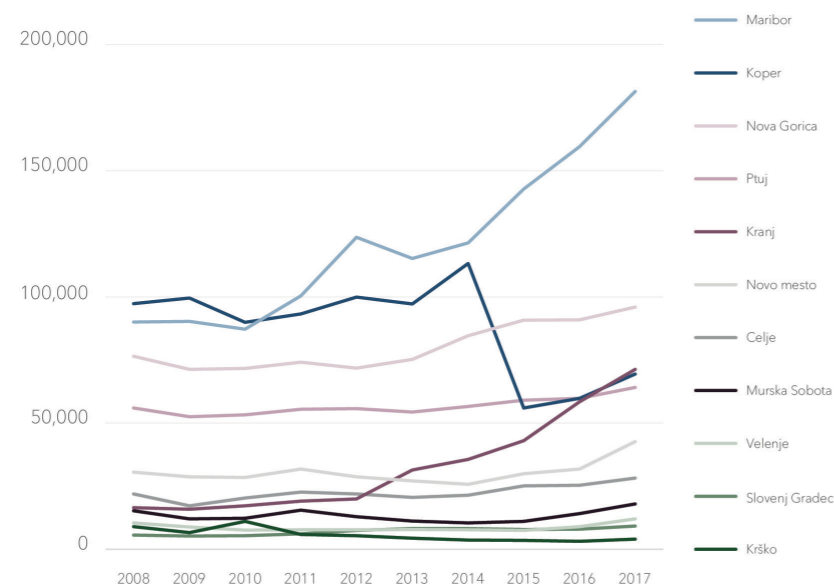
Overnight stays in Slovenia between 1948 and 2019 by type of tourism destination (Source: SURS Yearbooks, published in Klepej and Marot, 2021)

In Slovenia, 14 towns were marketed as historic towns in a joint promotion brochure around 2010, including Celje, Idrija, Kamnik, Koper, Kranj, Ljubljana, Maribor, Novo mesto, Piran, Ptuj, Radovljica, Slovenske Konjice, Škofja Loka and Tržič. The brochure offered more detailed descriptions of what each city had to offer, the events and excursions available in surrounding areas, and suggestions for intercity trips. Today, other towns have also start to catch up with regard to tourism development. Examples include, amongst others, Nova Gorica, Ajdovščina, Trbovlje, and Velenje. The Statistical Office of the Republic of Slovenia defines eleven municipalities as urban destinations - and for which changes in arrivals between years 2008 and 2017 are shown in Figure 2.5. The first is Maribor, which earned the title of European Capital of Culture in 2012, and the second is Ljubljana, which has become one of Slovenia's main tourist destinations in recent years (Horvat, 2012; 2018). Maribor planned to establish itself as a key Central European destination based on the title, and a broader regional impact as a consequence of the title, was envisaged, as cultural projects and activities were implemented together with five other partner cities (Ptuj, Slovenj Gradec, Murska Sobota, Novo mesto and Velenje). The key tasks of cultural capital were: connecting cities, strengthening Slovenia's cultural potential and recognition at city and regional level, promoting intercultural dialogue and creativity in different fields, and educating tourist guides. According to

the study, the project's objective of maximising the long-term effects of the culture and tourism sectors was only partially achieved. Among the impacts mentioned were 20% more overnight stays than in 2011 (355,000 in total), between 500 and 600 new jobs being created, and four euros reimbursed for every public euro spent (Kovač and Srakar, 2013). As presented in more detail in Chapter 4, Maribor continues to establish itself as the second largest city destination in Slovenia.

**Figure 2.5**

Tourist arrivals by municipality, 2008–2017. Ljubljana is not included in the figure due to a high value of the indicator. The change in arrivals for the city was from 391,431 arrivals in 2008 to 841,320 in 2017 (Source: SURS, 2022b)



Ljubljana is one of the fastest growing destinations in Central Europe, more than doubling the number of tourist arrivals that it has welcomed in the ten years between 2008 and 2017 (SURS, 2022b). Ljubljana, which also applied to become the European Capital of Culture for 2025 in 2021 (but was unsuccessful), has been guided in its tourism development by the Ljubljana Tourism Board which was established in 2001. Its aggressive promotion within global markets before the pandemic has significantly changed the origins of visitors to the city, with an increase in Asian tourists in particular. Culinary and congress tourism were also being developed rapidly before the pandemic, and the city is constantly developing new tourism products; more recently, the emphasis has been on tourist experiences of the city, active experiences of green spaces, and the redistribution of tourists to the rest of Ljubljana's city districts.

Slovenian urban tourism has faced several challenges in the wake of the pandemic. While the developments of the last ten years have highlighted Ljubljana as one of the main city destinations, and indeed as one of Slovenia's main destinations, other cities are following a different pace of development. In light of the recent trends in urban tourism, only Ljubljana can be singled out as a macrodestination, while other cities serve as supporting destinations. Most city municipalities have expanded their tourism offers from cultural tourism to other types of

tourism, and have also renewed their marketing strategies and tourism infrastructure; as shown, for instance, in the case of Kranj (Medja, 2021) and Celje (Jurgec, 2020).

### 2.3 Definition of urban tourism

Urban tourism research started approximately thirty years ago. Ashworth was certainly a pioneer in this field (Ashworth and Voogd, 1988; Ashworth and Tunbridge, 1990; Ashworth, 1992; Ashworth and Page, 2011a). In 2011, he and Page identified twelve possible topics for the study of urban tourism: e.g. cultural offers, regeneration, management and planning and urban typology (Ashworth and Page, 2011b). According to Ashworth and Page, urban tourism is a distinctly interdisciplinary field and best be explained by an interplay of different theories and concepts. Economists are concerned with the economic aspects of urban tourism, geographers with statistics and the spatial dimension of tourism, sociologists with the social aspects of travel and destination impacts, and other disciplines also study the field. It is therefore particularly important that everyone agrees on the definition and terminology of urban tourism. It is perhaps most useful to adopt the definition of the World Tourism Organisation (UNWTO), which defines urban tourism as 'travel and visitation by visitors and tourists in cities or places with a high population density. The duration of such trips is usually short, i.e. between one and three days' (UNWTO, 2022). One should bear in mind that the general definition of a tourist is that he or she must spend at least one night in a city in order to be considered a tourist and not just a visitor to the city (SURS, 2022a).

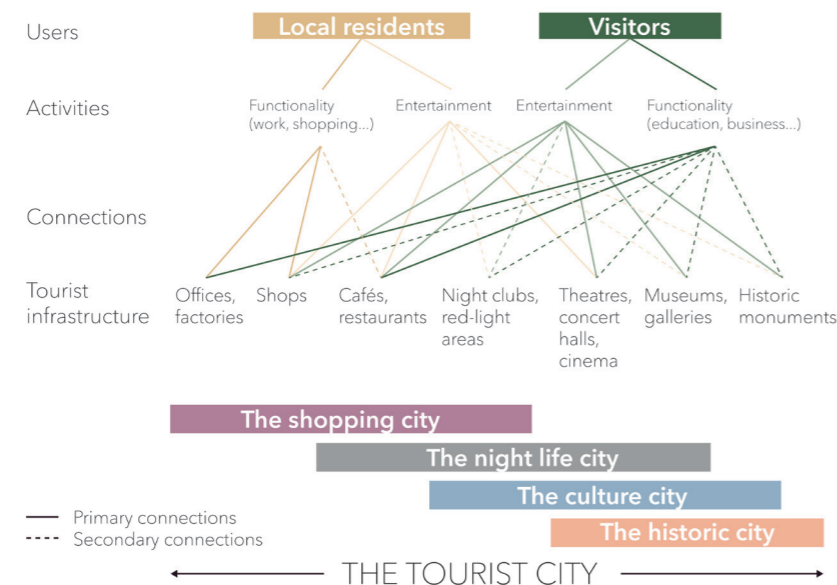
Ashworth (1989) identified different ways of studying and perceiving urban tourism:

- spatial analysis of the locations of tourist attractions, facilities, infrastructure, transport routes, hotels and business zones;
- the study of the morphological structures of urban areas and their interconnectedness, which includes the description and identification of functional zones or areas such as: the central business district, the historic core, the commercial core and the industrial area, all of which are linked to the tourist area;
- studying the city user (residents, visitors, tourists), looking at their activities, characteristics, motivations and purpose;
- managing tourism in the context of the city, including tourism promotion and adaptation, infrastructure provision and destination marketing.

Blank (1994), in contrast to Ashworth, emphasised the functional approach and the activities carried out in support of tourism as a business sector in the city, including: marketing, management of tourist facilities, destination marketing and others. In this monograph, we have tried to cover as many of these aspects as possible, but the main focus has remained on the spatial, user and management aspects.

At first glance, the definition of urban tourism simplifies the complexity of the relationships that are established in a city as a result of tourists' arrivals. Tourists consume the tourist offers, but also benefit from the rest of the city's infrastructure, - including that which was originally intended for residents (see Figure 2.6; Burtenshaw, Bateman and Ashworth, 1991). Thus, while tourists stimulate improvements in the supply of goods, the living environment, the infrastructure, and the art-historical image of the city through increased demand, they also put additional pressure on its urban space. The differentiation between the locals and the tourists gets difficult because tourists can easily become residents by coming to city to tele work. Such 'migrants' are also referred to as 'modern nomads', as they further blur, in addition to day visitors, the boundaries between residents and tourists. Today, we speak of so-called urban travellers, those who are particularly interested in the experience of getting to know and live in the (given) city as local residents (Novy, 2010; Pasquinelli, 2017; Stors et al., 2019). The issues raised in the study of the relationship between residents and tourists and their impact on urban development were also recognised in fieldwork carried out in 2021, in which the nature of predominantly individual tourists made it difficult to separate them from the local population (Marot et al., 2021).

**Figure 2.6**  
The interaction of residents and tourists in a city (Source: Burtenshaw, Bateman and Ashworth, 1991)



In addition to the complexity of relationships, urban tourism is also multidimensional in terms of tourist attractions. While in other types of tourism, such as shopping, medical tourism, sports tourism, the main motive of the tourist can be clearly defined, in the case of cities, the definition is linked to the place visited by the tourist and not a specific offer. Ashworth and Page (2011b) argued that urban tourism is characterised by a series of unusual paradoxes:

- Cities, as multifunctional entities, attract crowds of tourists who are

- economically and physically blended into the population within them.
- Tourists make heavy use of the facilities, infrastructure and services of the city, which are created primarily for the inhabitants and not for tourism purposes.
- Cities that are most economically dependent on tourism have less added value than those with a well-developed economic base which are visited by a large number of tourists but are not dependent on tourism.
- The tourism industry needs diverse, accessible, and flexible tourism products to function; cities that can offer such products do not need tourism to function.

Key to understanding urban tourism are concepts that are primarily linked to urban development, such as urbanisation, gentrification, 'Airbnbization' and others. Urbanisation is more commonly known as the expansion of cities and urban life styles, and is not fundamentally related to tourism. However, the expansion of urban tourism and tourist offers has also led to the recent emergence of terms such as 'Airbnbization' and studentification. The former term describes the expansion of accommodation available through the sharing economy and associated social and spatial changes (Curto et al., 2021). The latter refers to the expansion of the provisions made for (and number of) students and includes services as well as addressing student housing; thus, stimulating the growth of student arrivals in the city (Malet Calvo, 2018; Lin and Ma, 2020). Both phenomena are associated with a reduction in the quality of life of residents and, in particular, with an increase in the price of real-estate and a restriction in the supply of housing and services for residents. All these processes have globalisation as a common denominator (Anić, 2020; more in Chapter 7), as cities and local communities take advantage of the international mobility of people, inexpensive flights and digital services, and promote themselves as places to visit, to work in, and to live in.

All these processes confront two groups of people, namely residents - the expressed need for daily services, the established way of life in cities - and visitors with motives and needs linked to a particular visit to a city. On one hand, there are services primarily aimed at tourists, i.e. accommodation facilities, tourist attractions, travel agencies, and, on the other, services for residents, e.g. health and education. At the same time, there are services available in the city that are used by both residents and tourists, whose consumption and capacity are, as a consequence, the most difficult to plan. Ashworth and Page (2011b) describe the relationship between residents and tourists in terms of four principles that can be used to best distinguish between the two groups:

- **Selectivity:** a tourist has a limited time in which to visit, certain knowledge, and predefined expectations, and therefore "uses" the city less than a resident. The study of tourists' movement and habits also contributes to decision-making on urban projects. Tourists perceive and use space selectively - based on their knowledge and preferences.



- **Rapidity:** tourists have short visits to cities, in contrast to other forms of holiday; they consume tourist products and services quickly; their visits to attractions are often measured in minutes.
- **Repetition:** tourists return to the same urban environment less frequently than to a natural or rural environment, which is linked to the authenticity of the city, its attractions and the availability of similar destinations. The desire to encourage return visits is one of the reasons why new marketing strategies are constantly being sought to bring one-time visitors back to the city.
- **Capriciousness:** urban tourism is one of the types of tourism that is constantly changing. It is a type of tourism that is dependent on new social trends and changing lifestyles in cities. Some cities are adapting well and others are either not adapting to these sudden changes or deliberately choosing not to. Problems of adaptation arise when upgrading tourism products based on sites with historical significance and uniqueness.

The economic aspect of tourism is reflected in the competitive approach to promotion; cities try to be innovative with slogans and offers, their use of social media, and their development of niche products that they guarantee can only be found in their individual city (Paskaleva-Shapira, 2007; Oguztimur, and Akturan, 2016; Zenker et al., 2013). By opening up employment opportunities and economic benefits, urban tourism also plays important roles in urban planning and in catering to people's sense of well-being. Competition between cities not only leads to an accelerated growth in promotion, marketing, and competition for domestic and foreign tourists, but also contributes to improved services and an overall higher standard of living for local residents. This view was reinforced in the SPOT project, in which we asked residents about the added value of cultural tourism for the city of Ljubljana. According to them, the growth of cultural tourism contributed positively to the development of the city (70% chose this answer), 22% considered the impact to be very high, and 17% were sceptical as they could not decide whether there had been a positive or a negative impact. The word cloud (Figure 2.7) provides more detail on the impact of cultural tourism on city life. In particular, residents highlighted the increased variety of cultural offer as a factor that contributed to making a city more vibrant, walkable and recognisable. Culinary offer and the quality of life have also improved and are linked to an enriched knowledge of the language, local offers, and socialising opportunities. There have also been positive impacts in the economic sphere, including an increase in investment, employment and business opportunities, as well as overall tourism development. The interaction between tourism and space is described in more detail in Chapter 6, and with regard to tourism and society in Chapter 7.



**Figure 2.7**  
Added value of the cultural tourism for the city of Ljubljana (Source: Klepej et al., 2021, p. 59)

## 2.4 Types of urban destinations

Cities, as multifunctional entities, are based on diversity; thus only a few of them are economically dependent on tourism alone. Within cities we can find individual areas where tourism services are concentrated, but only in a few cases have individual cities developed in the analogy of coastal resorts, i.e. as urban resorts. Based on this insight, Page (1995) developed a typology of cities in tourism, distinguishing between capital cities or capitals, metropolitan centres, major historic cities, industrial and cultural cities, and so-called urban resorts. Capital cities and metropolitan centres are not tourist cities in terms of their original function, but are major urban centres with a high concentration of functions and services for residents of the settlement and the wider hinterland. Tourism is most often only one of the economic activities in these cities, and tourist attractions are linked to historical development (Figure 2.8). These towns host major sporting, musical and other cultural events, attracting a greater number of visitors, and they also represent congress centres. Examples of such cities include classic European city destinations such as Vienna, Paris, London and, last but not least, Ljubljana.

**Figure 2.8**  
Scenes from tourist-historical cities Siena (left) and Budapest (right) (Author: Naja Marot)





Resort cities have been deliberately built for tourism purpose; such as Las Vegas in the USA (Figure 2.9). Mullins (1991) describes the process of constructing such a city as 'tourist urbanisation'. With regard to Las Vegas, the city was founded in 1905, shortly after the opening of the rail link between Los Angeles and Salt Lake City. The station attracted farmers, most of whom came from Utah. Development was accelerated by the fresh water the town received in 1911, but the biggest leap in development came in 1931 when the Hoover Dam was built. In the meantime, the town's convenient location made it a gathering place for the young men who built the dam, and Vegas theatres and casinos were a place for their entertainment. Electrification made it possible to build further hotels on Main Street. Howard Hughes tried to overcome this narrow focus in 1966, when he wanted the town to become a family tourist centre; what is now known as a mega-resort. The city tried to provide specific spatial characteristics, e.g. copying European architectural styles, accelerated building and planning, and rapid population growth based on a highly flexible system of production and consumption. In Slovenia, a similar urban development path was taken in Nova Gorica, where gambling started to develop two to three decades after the city was built.

**Figure 2.9**  
View of Las Vegas  
(Author: Naja Marot)



In 1999, Fainstein and Judd presented a slightly different typology of cities, dividing them into resort cities, tourist-historic cities and transformed cities. As in the previous division, it can be concluded that cities never fit only one model, instead, they are intertwined in terms of what they offer. Historic cities are the basis for the development of urban tourism in Europe; their offers are based on historical, architectural and cultural heritage and cultural identity. Tourist attractions are part of the existing urban fabric, and tourism activity is most often concentrated in one area. These classic historic destinations in Europe include Paris, Vienna, Budapest, Prague, Rome, Florence and other cities (Richards, 2001). These cities

are also the most likely to have developed so-called cultural districts. The most famous cultural districts are in Vienna (Museum Quarter) and Berlin (Museum Island). Ljubljana has a smaller cultural offer which does not attract as many foreign visitors as the above-mentioned examples (Kozina and Bole, 2018). Nevertheless, Ljubljana is working on establishing cultural quarters in the locations of Kino Šiška, Bežigrad and Metelkova, while at the same time promoting the existing cultural offers in the city centre in a coherent way with the 'Five Minutes to Culture' campaign. The cultural offers in cities can be divided into so-called high culture, which includes first-class attractions such as museums and galleries, heritage, architecture, and popular culture, such as cuisine, crafts, festivals and street music.

Some cities have received special tourist stimulus as a consequence of urban renewal processes. Generally, these are industrial cities, where the process of transformation from industrial to post-industrial city has stimulated tourism development. Thus, industrial cities which were left by the people to go elsewhere for their holidays, are becoming attractive tourist destinations in the post-industrial era (Kennell, 2012). As these are often vast empty areas, a comparison of renewal projects in Europe reveals a uniformity of architecture and a lack of local identity, as they are mostly expensive properties built for foreign visitors and investors, rather than for the local population (Spaans, 2004). The disadvantages of such redevelopment is that the involved design is primarily concerned with tourists and visitors, and not so much with local contexts. Thus, in these areas, cultural and café districts, congress centres and hotels are often built without providing basic services. This process can also be linked to the notion of gentrification, whereby areas with a socially weaker population are slowly forced to move out because of constantly increasing prices of property and everyday life costs because of the renovation (Breckner and Menzl, 2012; del Biaggio and Harfst, 2009).

## 2.5 Scope and trends of urban tourism

In the following section, basic statistics on the main tourist destinations and the shares of tourism within each city are presented. Starting at the global level, we look at world cities as tourist destinations, we then look at data at European and national levels. At the global level, it is best to use the data collected by Mastercard from its credit card customers<sup>1</sup>. For tourism destinations they have produced the 'mastercard global destination index' which consists of the number of international tourists, visitor spending, and average length of stay. In the pre-pandemic year of 2019, Bangkok was the number one city in terms of visitor numbers, followed by two European cities, Paris and London, both with around 19 million visitors (Table 2.2). The annual growth of these cities is low; up to 3% per year. In comparison to rates in Central Europe, at a global level only three cities had growth rates higher than 8% and 10% per year respectively. Looking at the trend compared to 2018, all cities except London with its 4% drop, recorded an increase in visitors.

<sup>1</sup> The Mastercard Global Urban Destinations Index ranks 200 cities based on international arrivals and cross-border spending in the cities. It calculates visitor projections and predicts spending growth based on Mastercard usage.

The city with the highest tourist expenditure was Dubai, where tourists spend up to 553 USD per day. Although the dynamics of city-visiting have changed and, as we will see later, visitors are also visiting smaller cities, the world's top ten destinations have remained the same for quite some time. Bangkok, London, and Paris have alternated between the top three places since 2010, and New York has also been a constant on the list. Among other countries and areas, Asia needs to be noted as the number of Chinese tourists has soared to a point whereby they represent, behind the USA, the second most important source market for the top 200 city destinations.

**Table 2.2**

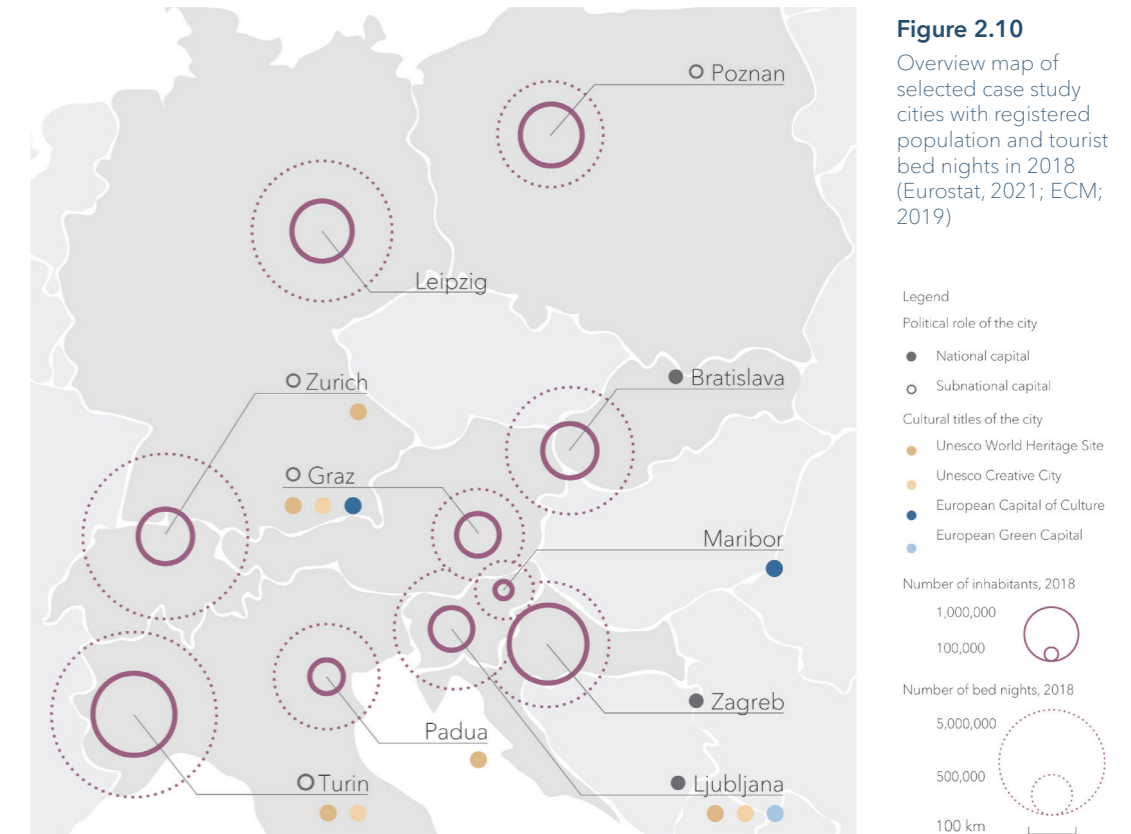
The most visited cities globally (Source: Mastercard Global Index, 2019)

	2018 (Number of overnight visitors; millions)	Growth projections for 2019	Average length of visit (nights)	Average consumption per day (€)
Bangkok	22.78	3.34%	4.8	167
Paris	19.10	2.24%	2.5	269
London	19.09	3.47%	5.8	134
Dubai	15.93	1.68%	3.5	503
Singapore	14.67	4.0%	4.2	247
Kuala Lumpur, Malaysia	13.79	9.87%	5.7	129
New York	13.60	2.94%	7.9	138
Istanbul	13.40	8.14%	5.8	96
Tokyo	12.93	10.02%	5.4	178
Antalya, Turkey	12.41	8.14%	14.0	40

With regard to the pre pandemic period, it can be seen that in 2018 and 2019 (according to the ECM report, which includes 119 European cities), that overnight stays grew by 4.2% per year. There were no major changes among the cities with the most visits, except for Istanbul's immense growth (20% compared to the previous year, leaping from eighth to fifth place). The top five cities in terms of overnight stays were London with 71.2 million, Paris with 52.5 million, Berlin with 32.9 million, Rome with 28.5 million, and Istanbul with 21.0 million. The cities with the highest levels, apart from Istanbul, were Munich (9%), Paris (9%), Amsterdam (7%) and Vienna (6%). The main source markets in Europe were Russia, China, the USA, Japan, Germany, the UK, France, Spain, and Italy, with some decline only being witnessed in the French and Russian markets. In terms of accommodation capacity, the highest growth rates in the period 2014–2018 were in Seville (19%), Verona (16.4%) and Venice (16%). While the average occupancy rate for the 95 cities was 51%, some cities had occupancy rates as high as 79% (Barcelona), Rome (77%) and Helsinki (76%). Monaco, Bilbao, Belgrade and Lyon also had occupancy rates over 70%. These figures suggest that Europe's main capitals were still the most visited.

Recently, new destinations have become more popular with tourists and investors in the tourism sector. These include medium-sized cities

in central Europe, and smaller capitals or regional centres with less than one million residents. For the purpose of analysing urban tourism in the wider Central European region, we selected ten cities from eight countries (see Figure 2.10) that are most similar to Ljubljana and Maribor in terms of their spatial characteristics and tourism specifics. This allows our work to place Slovenian cities in a broader context based on the availability of statistical data and the comparability of tourism volumes.



**Figure 2.10**  
Overview map of selected case study cities with registered population and tourist bed nights in 2018 (Eurostat, 2021; ECM; 2019)

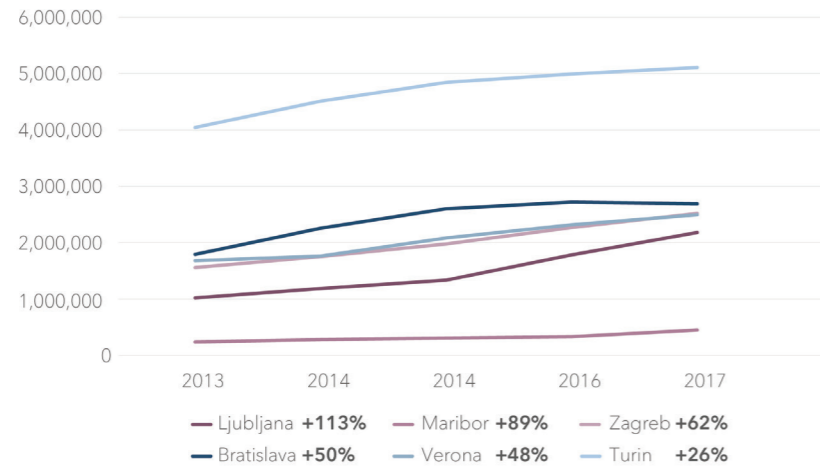
The selected cities include three national capitals (Bratislava, Ljubljana, and Zagreb), four sub-national capitals (Graz, Poznan, Turin and Zurich), and three cities without major political roles (Leipzig, Maribor, and Padua). While the cities are in different phases of tourism development, all of them have experienced increases in tourist arrivals in the years immediately preceding the Covid-19 pandemic.

The number of registered overnight stays increased in all of the selected cities. The change in the growth rate between cities can be seen, for example, in the case of Graz and Ljubljana, which recorded similar numbers of overnight stays in 2014. In the period up to 2018, Graz recorded a 10% growth in overnight stays, while Ljubljana more than doubled its number of tourist overnight stays (see Figure 2.11). International overnight stays accounted for a majority of registered overnight stays in most cities, with the highest shares being in Ljubljana (95%), Maribor (88%) and Zagreb (84%). The lowest shares of overnight stays

by international tourists in 2018 were recorded in Leipzig (16%) and in Poznań and Turin (around a quarter in both cities). In cities with available data, the number of bed nights increased over the period 2014-2018, with the highest increase being in Zagreb (+52%). The only exception was Graz, with a 1% decrease in bed capacity. This data was not available for Bratislava and Maribor in the ECM report (2019).

**Figure 2.11**

Increases in arrivals in selected cities during the period between 2014 to 2018 (Source: ECM, 2019)



The occupancy rates of existing bed capacities monitored by official statistics, and calculated as the total number of overnight stays divided by a 365-bed capacity, was between 40 and 50% in most cities. In all the cities, there had been a significant increase in short-term tourist accommodation based on the sharing economy (e.g. Airbnb) in recent years; this is often not recorded in official tourism statistics (Kadi, Plank and Seidl, 2019; Postma and Schmuecker, 2017). In all of the selected cities, the number of active rentals on Airbnb and Vrbo increased significantly, and more than doubled in Poznań and Bratislava. In total, there were more than 23,000 active rentals and approximately 89,000 beds. According to the ECM report (2019), the total bed capacity of the eight cities with data from 2018 was almost 130,000; in the same year, there were approximately 85,000 beds listed on Airbnb and Vrbo in these cities. According to AirDNA, there were more than 2,000 active providers in Ljubljana at the beginning of 2020; these hosts could accommodate an average of 3.9 guests, exceeding the city's total accommodation capacity as reported in the 2018 ECM report. This data points to there presently being a lack of measures by which to comprehensively capture the scale of urban tourism.

By comparing the number of overnight stays with the number of residents (Eurostat, 2021; Statistics Poland, 2021; Statistik Austria, 2021), we estimated the scope and intensity of tourism in cities. This also enabled us to potentially identify the negative effects of tourism in the selected areas. Zurich had the highest number of tourist nights per resident (12.8), followed by Padua (7.9), Ljubljana (7.5), Bratislava (6.2), Leipzig and Turin (both 5.8). On the basis of this index, which is called the Charvat index (Marković et al., 2017), we estimated that these cities

were more susceptible to the phenomenon of overtourism. Graz (4.2), Maribor (4.1), Zagreb (3.2) and Poznan (2.7) had fewer than five overnight stays per resident. The comparison of the number of overnight stays per 100 residents (Eurostat, 2020), also known as the Charvat Index (Štefko et al., 2018; Capital City of Slovakia - Bratislava et al., 2018), is another indicator of the extent and intensity of tourism in cities. Again, Zurich had the highest value (5.7), followed by Turin (3.4), Padua (3.2), Zagreb (3.2), Leipzig (3.1) and Graz (2.8). Poznan and Ljubljana had the lowest Defert index (1.7 and 2.2 respectively). Museum visits were by far the highest in Ljubljana (6.3 per capita), followed by Turin (3.9) and Zurich (2.8), and lowest in Poznan (0.6) and Zagreb (0.9).

The attractiveness of the cities has been verified by the number of international conferences and luxury hotels that each hosts. The data collected showed that Zurich had by far the most five-star hotels (15), followed by Leipzig (7), Bratislava (6), Zagreb (5), Turin (4), Poznan (3) and Ljubljana (1). Graz, Maribor and Padua did not have five-star hotels. Ljubljana (59), Zurich (49) and Zagreb (41) hosted the most international conferences in 2019, followed by Turin (26), Bratislava (25), Poznan (23), Graz (18), Leipzig (15), Padua (8) and Maribor (6). All but two cities (Graz and Maribor) also offered a tourist card. Padua was the only city without a passenger airport, while Maribor airport had no regular passenger routes. The number of air passengers per resident was by far the highest in Zurich.

## 2.6 Types of urban tourism and types of visitors

Urban tourism and the types of tourism that develop within cities depend on three aspects: urban, which refers to the urban way of life and the enjoyment of the urban atmosphere; industrial, which refers to the past development of cities; and cultural, which refers to the individual locality's rich history, the creativity of the local people, and the attractions available to visitors. Cultural attractions have long been a traditional motiv for visiting cities, but at the beginning of the 21<sup>st</sup> century, the motives for visiting cities began to change (Richards, 2022). Several authors (Boivin and Tanguay, 2019; Fueller and Michel, 2014; Elridge, 2019) suggest that people now come to cities to experience city life, appreciate architecture, and to enjoy open spaces and new products. Based on the main interest of tourists, the following main types of urban tourism have been identified:

- **Cultural tourism:** travelling outside one's own domestic setting for cultural offer[s] or cultural life in order to visit or participate in cultural activities, for example: visiting a museum, a concert, a historical site or a landmark, but also including active participation in a folklore event or a gastronomy class, (Tourism and Culture Synergies, 2018). There are several definitions depending on the focus and width covered by this type of tourism, (Tourism and Culture Synergies, 2018). "In a broad sense, it is a tourism product that emphasises uniqueness, sustainability, and the importance of marketing in order



to satisfy the need for intellectual experiences. In a narrower sense, it is a trip with a cultural motive, or undertaken with a desire to learn about new cultures, attend cultural events and visit cultural attractions" (Bujdosó et al., 2015, p. 312). "Here, the attraction is the basis for a unique experience at the destination. Cultural tourism is also called heritage or ethnic tourism, as it markets attractions with cultural content, places and buildings with religious content, folklore traditions, and a way of life with the customs and traditions of a society. The cultural tourist also learns about the history of the place and the way of life of the people at the destination" (Azmi and Ismail, 2016, p. 530). "The main motive for visiting a destination is to learn, discover, experience and experience the tangible and intangible cultural attractions and tangible and intangible products at the tourism destination" (Tourism for Development - Volume I: Key Areas for Action, 2018, p. 80). When we talk about arts tourism, we refer to the arts in general, their products, and to various artistic activities (ballet, concert, festival, opera, museum workshops). Heritage tourism includes: visits to preserved buildings and urban landscapes, as well as historical events and learning about historical persons.

- **Religious tourism:** tourists who explore their religion and visit religious tourist attractions and attend religious events such as pilgrimages.
- **Gastronomy tourism:** tourist offers include traditional or other locally distinctive dishes. Tourists usually visit typical restaurants, taste local products, and see how they are produced. In this way, tourists are educated about the culture of the city. The advantages of this type of tourism are that it is unlimited in time and that it establishes a cultural link between the city and the countryside; thereby contributing to better spatial integration of tourism activities.
- **Youth tourism:** concerns the 16 to 29 years old age group. Young people, eager for adventure and new independent experiences and socialisation, travel to have new experiences and discover the world. They attend a wide range of events for young people and typically stay in the most affordable types of accommodation such as hostels, campsites, and apartments. These trips are usually shorter and range from 1 to 3 days.
- **Congress tourism:** short trips made with an educational or business purpose, i.e. networking in different professional fields, often accompanied by sightseeing. The scale of congress tourism can vary greatly; from small events attracting a few hundred visitors to larger events attracting thousands.
- **Shopping tourism:** combines tourism as a leisure activity with the desire for shopping. This type of tourism has led to the development of alternative tourist destinations, which tourists visit primarily to shop. This means that the economic impact of this type of tourism is high since tourists come to a destination to spend large amounts of money.

The types of tourists in cities are defined according to their motives for travelling and visiting tourist destinations. As a result we can talk

cultural tourists, more specifically music, gastronomy and architectural visitors; business or congress tourists, educational tourists; VFR tourists or visiting friends and relatives; and sports and shopping tourists. As cultural tourists are among the most typical tourists in the city, they should be defined more precisely. In general terms, cultural tourists can be divided into specialised and general cultural tourists. For the general cultural tourist, visiting different geographical areas is a hobby. With time and knowledge, however, the general cultural tourist can become specialised, and may focus on a smaller geographical area or a specific cultural subject. A specialised cultural tourist is therefore often considered to go to a particular place, region, or country in search of a deeper cultural understanding. Or they may go to different places in search of a specific art, historical period, festival, or museum" (Defining Cultural Tourism, 2016, p. 72). Rodzi, Zaki and Subli (2013) understand the tourist as one of the four elements of cultural tourism (alongside tourism, cultural heritage and new experiences or use of a tourism product), and divide cultural tourists into five groups:

1. **The dedicated cultural tourist** - for whom cultural tourism is the primary motive for visiting a destination; it is a deeper form of cultural experience.
2. **Active cultural tourist** - although cultural tourism is also the primary motive of the visit (e.g. sightseeing), it is a superficial cultural experience.
3. **Unintentional cultural tourist** - for whom culture is not the primary motive for visiting a destination, but who has an unintentional and unexpected encounter with a deeper cultural experience at the destination.
4. **The casual cultural tourist** - for him/her, culture is a weak motive for visiting a destination; if anything, he/she has a superficial cultural experience.
5. **The accidental cultural tourist** - for him/her culture is not a motive for visiting a destination; if at all, he/she receives a superficial cultural experience.

The Slovenian Tourist Board (STO, 2022) has identified 12 target groups of foreign tourists in Slovenia; they are defined below as so-called 'tourist personas'. They are divided into four main groups with the explorer group definitely not being urban tourists, as he/she is mainly interested in nature and sports activities, nor is the muse group, which is most interested in relaxation. Of the socialisers, who are one of the main persona groups and whose main motive is to socialise, the carefree youth and the active nostalgic are to be found in cities. The carefree young people fit in with youth tourism, as they are interested in having fun and visiting tourist attractions; their visits are mainly seasonal and short-term. Active nostalgics are those who are interested in music, film, and the objects of their youth, and usually come for a day. The most urban group is the so-called 'mixed persona'; they combine aspects of the urban conscious, the sociable 'foodie', the relaxed escapist, and the urban consumer:

1. **Urban conscious tourist:** persona learns about new and different environments and gains new experiences, especially in a city. They



are thrifty and have a desire to experience local and everyday life as much as possible. They are usually younger people travelling with friends.

2. **Sociable 'foodie'**: the persona is organised, with a tendency to consume. Interested in cultural experiences in the form of culinary experiences. In addition to cuisine, she/he is also interested in history.
3. **Relaxed escapist**: the persona seeks carefree, calm, and special experiences. They are looking for local culinary specialities and quality hotel facilities.
4. **Urban consumer**: the persona is interested in the main European cities and is therefore likely to have a unique visit. She wants to experience the local culture and the main sights, usually travels by plane, and spends a lot of money in order to see as much as possible in as little time as possible.

As the personas described in the previous paragraph indicate, the most common motives for visiting a city are mainly social and sociable, i.e. visiting relatives and friends, education, recreation, religion, culture, entertainment, business, and leisure. When we talk about tourists' visits to a city, we are really talking about their experiences. The tourist experience is a concept that describes the experience of an individual, which is influenced by: the environment, different situations, personal factors, and the level of communication achieved. Experiences vary from one to another, as tourism also has a variety of effects on individuals. Ashworth and Tunbridge (1990) attempted to define the 'users' of a city in terms of what infrastructure they need and what they visit in cities. These are:

- dedicated visitors from outside of the city (holidaymakers and heritage tourists);
- a dedicated visitor from the same city (use of recreational and entertainment infrastructure);
- Incidental visitor from outside the city (business, congress, exhibition and visitors visiting relatives);
- the occasional visitor from the same city - city dwellers who are going about their daily business and therefore have no need for recreational or tourist infrastructure.

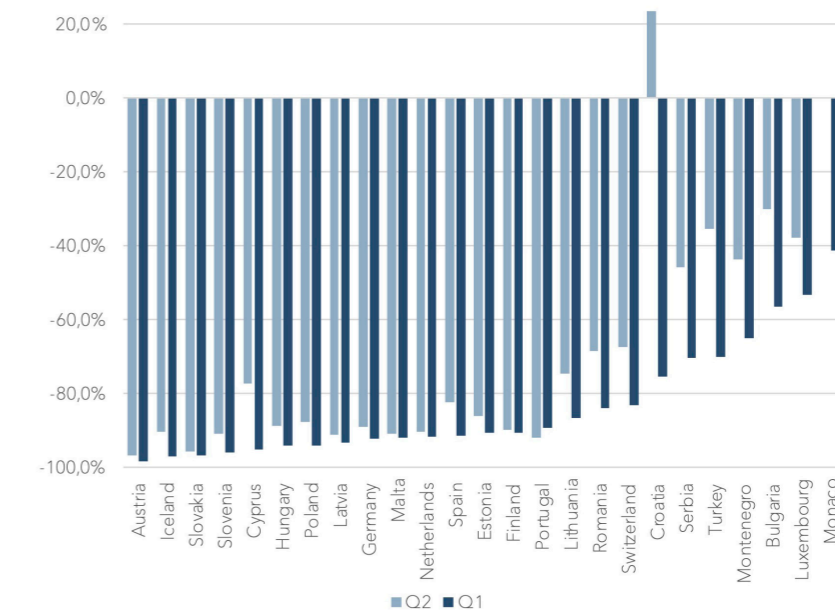
These categories of visitors are particularly relevant for examining the spatial aspects of urban tourism and tourist flows, as described in more detail in Chapter 6.

## 2.7 Urban tourism and Covid-19

### 2.7.1 Tourism statistics for the pandemic period

Thus far in this chapter we have mostly talked about growth in relation to urban tourism. However, this is no longer the case following the outbreak of the Covid-19 pandemic in 2020. The Covid-19 pandemic has had a major impact on the tourism sector, especially on urban tourism, as cities are primarily dependent on foreign visitors. If the World Tourism Organisation's forecasts at the beginning of 2020 were still

optimistic with around 60% of decline, by the end of the year the most pessimistic scenario had come true. Europe has lost 71% of arrivals, with the greatest losses being experienced by the Scandinavian countries, which - especially Norway - imposed very strict entry restrictions in 2020. At the level of European Union Member States, the overall decline in tourist arrivals in 2020 was between 50 and 85%, with the largest decline being in Cyprus (84%), while Austria saw the smallest decline in tourist nights in the same year, at 41%. However, the data for 2021 shows a decline in tourist arrivals in both periods, of around 96% in the first half of 2021 and a slightly smaller percentage (of around 70%) in the second half of 2021 (Figure 2.12) (Knežević et al., 2021).

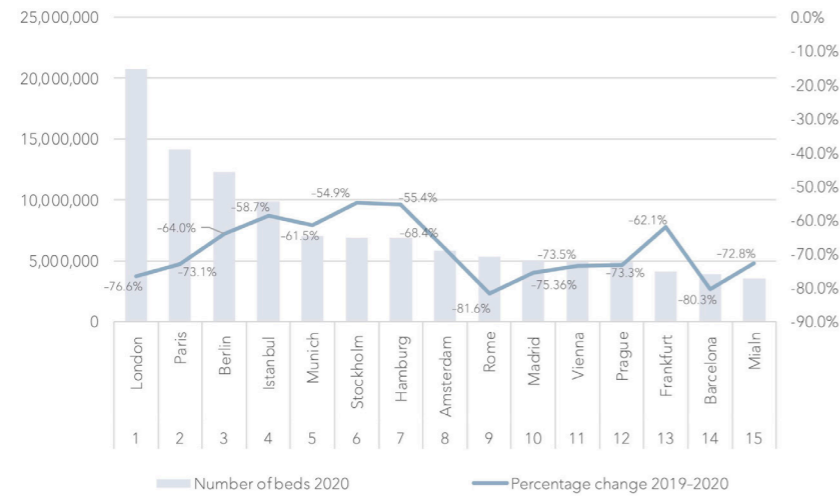


**Figure 2.12**  
Change in tourist arrivals in the 2021 pandemic year (Source: Knežević et al., 2021)

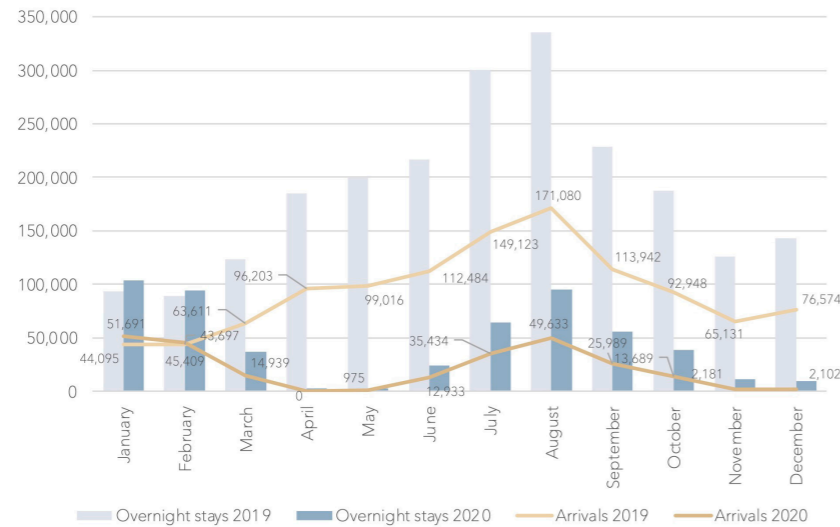
Changes were also evident in European urban destinations which were more affected by the Covid-19 pandemic than rural tourist areas. Hotel occupancy rates decreased significantly, especially in Paris and Rome, which saw occupancy rates of only 9%; Berlin and Madrid had occupancy rates of 11% and 16% whereas occupancy rates in cities in other tourist regions (Asia, America, etc.) increased in the first half of 2021 (Singapore 63%, Auckland 59%, Los Angeles 47%, etc.) (Knezevic et al., 2021). The most significant changes were observed in 2020, when cities saw an average decline of 60%. Rome (-82%) and Barcelona (-80%) experienced the largest decreases in overnight stays compared to 2019, while Hamburg (-55%) and Stockholm (-55%) experienced the smallest decreases (Figure 2.13; ECM, 2021). The effects of the Covid-19 pandemic on European cities, as well as on the rest of the world, were quite similar and are described in more detail in the next sub-section.

2 Urban tourism in the 21<sup>st</sup> century

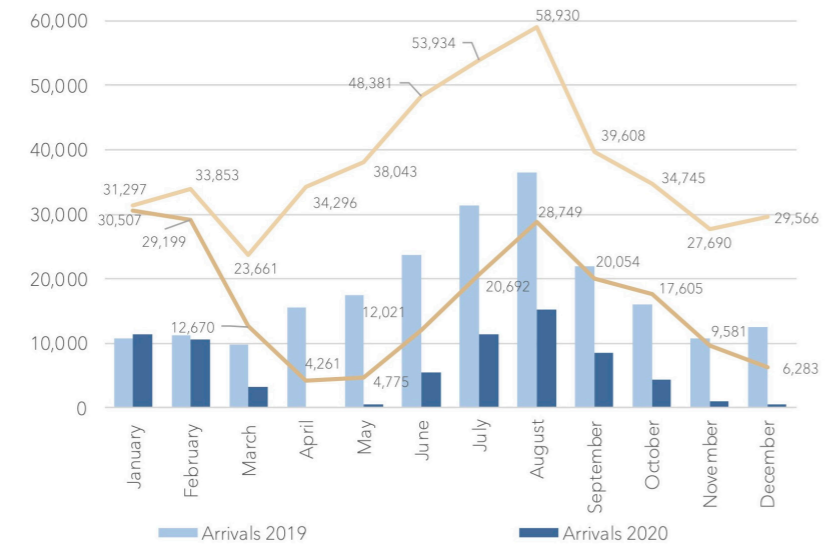
**Figure 2.13**  
The 15 most visited European cities in a pandemic year 2020 and the loss of visitors in year 2020 compared to the year 2019 (Source: ECM, 2021)



**Figure 2.14**  
The loss of arrivals and overnight stays, comparison between years 2019 and 2020 in Ljubljana (Source: SURS, 2020a, b)



**Figure 2.15**  
Loss of arrivals and overnight stays, comparison between 2019 and 2020 in Maribor (Source: SURS, 2020a, b)



In Ljubljana, the share of overnight stays generated by foreign tourists in 2019 was 95%, while in 2020 the city lost 78% of overnight stays. The origin markets have significantly changed, with European cities losing out especially in the Asian market, which was the biggest growth market just before the pandemic. Figure 2.14 shows the change in arrivals and overnight stays in Ljubljana, while Figure 2.15 shows the change in arrivals and overnight stays in Maribor.

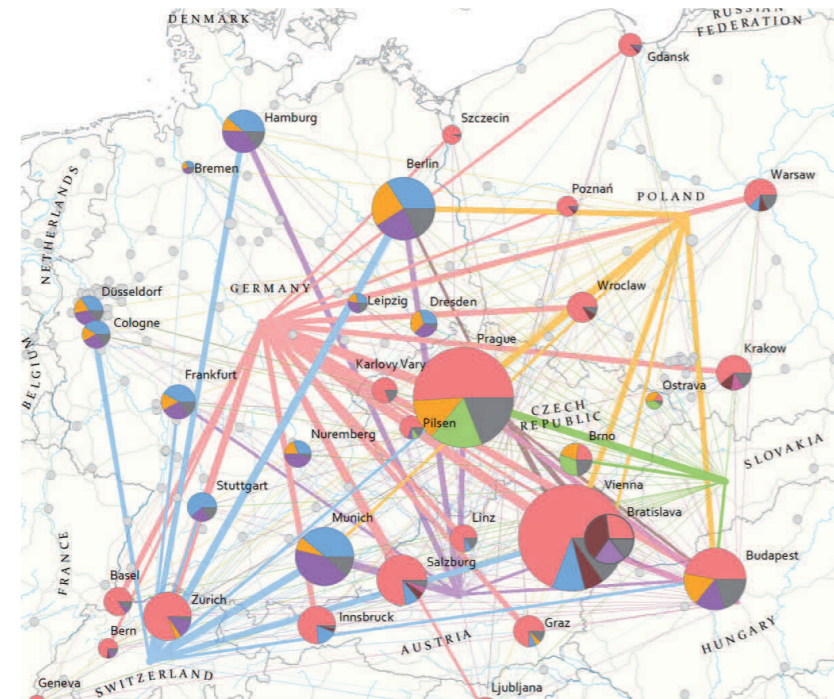
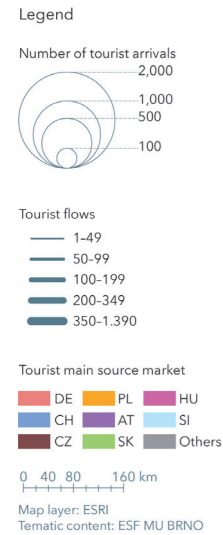
**2.7.2 Effects of the pandemic in general**

In general, today almost every tourist and professional in the tourism industry recognises some of the general effects of the pandemic on people's daily lives and on tourist destinations. In the short time that the global health crisis has lasted, many authors have looked at the impact of the pandemic on urban tourism in particular, and have used a variety of approaches to examine the effects of the pandemic from social, economic and/or spatial points of view. Anguera-Torrell, Vives-Perez and Aznar-Alarcon (2021) first defined the effects of the pandemic on urban tourism in general terms and then used the Urban Tourism Performance Index (UTPI) to assess the performance of urban tourism in 16 selected major urban destinations, such as Bangkok, Paris, London, Dubai, and other similar cities. Among the measures and impacts highlighted were the restrictions on international travel which affected urban destinations the most as they depend on international tourist arrivals. In line with the restrictive measures, tourists chose to travel to close-by destinations, mainly natural or rural areas, where they could avoid the crowding of urban tourism; a consideration which further contributed to the decline in tourist arrivals during the pandemic. Another reason for the decline in visits was the 'dictate' of keeping to social distances and changes in travel habits. Liang, Leng, Yuan and Yuan (2021) identified similar effects of the pandemic, and on the topic of increased visits to rural areas, they found that with restrictive measures, booking and rental prices fell, and at the same time people were more likely to rent in a rural area. The shift of tourism flows to rural areas was also confirmed by Åberg and Tondelli (2021), Anguera-Torrell, Vives-Perez and Aznar-Alarcon (2021). Other effects mentioned included a global decline in air travel, cruise ships, car and other transport rentals, and a decline in the use of hotel accommodation, restaurants, and other similar services.

Šauer, Vystoupil, Novotná and Widawski (2021) examined tourist flows in Central European countries before the pandemic (see Figure 2.16) to show the demands of the tourist market and the different types of tourists. At the same time, at a spatial level, the maps were intended to act as a tool for strategic planning and sustainable development of the tourism sector, as well as for balancing social and environmental impacts. They found that tourists travelled shorter distances, travelled individually, and that cities that were not visited as often by tourists before the pandemic became more attractive.

Figure 2.16

Tourist flows in Central Europe during the pandemic (Source: Šauer et al., 2021; published with permission of the authors)



The decline in travel was also reflected in a change of visitors' structure. In urban destinations, domestic tourists started to dominate over foreign tourists; a reversal of the situation that had existed prior to the pandemic. Related to this, Santos and Moreira (2021) in their research in Portugal found that it was the increase in domestic tourist arrivals that mitigated the negative effects of the pandemic, and that domestic tourism should be particularly targeted by the state when taking measures to revitalise the tourism sector of urban destinations.

The changed habits of tourists in Ljubljana were confirmed through a survey carried out in August 2020 as part of the SPOT research project. We interviewed 100 tourists: half of them said that the pandemic had had a strong or very strong effect on the ways in which they travelled (Figure 2.17). This was most evident in the increased attention to hygiene habits and the provision of health protection, as well as in the choices of destinations; they were increasingly within a radius of 500 km from individuals' places of residence. There has also been a change in views on reservations and travel planning, with a preference for individual travel by private car (see Figure 2.18).

Figure 2.17

Changes in way of travelling due to Covid-19, N = 100 (Source: Klepej et al., 2021, p. 38).

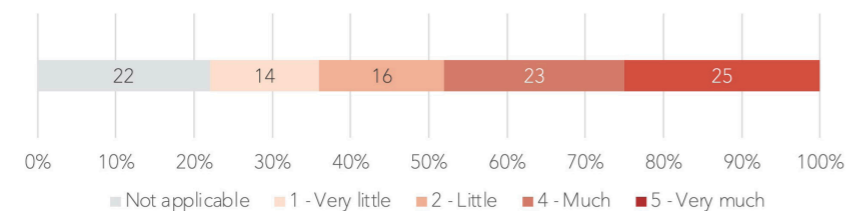


Figure 2.18

Changes in the tourist experience in cities (Source: Klepej et al., 2021, p. 38)



### 2.7.3 Tourism sector response to the pandemic

Measures to address the impact of the Covid-19 pandemic have been taken at both EU and Member State level, and have generally been linked to the re-launch of tourism sectors and the creation of safe international travel. One of the measures, which applied to all countries and was aimed in particular at restoring tourists' confidence to travel, was linked to the European Digital Certificate. It came into effect on 1 July 2021 and was valid if a person had been vaccinated with approved vaccines and had received a certain number of doses, had overcome the infection, or had a negative test result. This measure was instrumental in reducing the number of infections and attracting tourists and visitors, including for international travel, and contributed to a slow recovery of the tourism sector. Countries have taken rapid and accelerated measures to address the negative effects of the pandemic, and especially with regards to those that impacted urban destinations. Pre-pandemic trends had already indicated the need to change the ways in which the tourism sector operates, but now sustainable and green tourism development and investments in digitalisation and energy-efficient infrastructure have come even more to the foreground (Knežević et al., 2021).

At a city level, research on the measures is limited. For example, we found an article on adaptation in the Polish city of Krakow. The city reacted quickly to the pandemic. The first steps relied on the use of online networks, notably Facebook, which was used by tourism providers to refocus attention on supporting residents' activities, especially in the arena of gastronomy (food for takeaway). Residents were also encouraged to order local products online. The digital shift formed the basis for the development of locally supported programmes. Financial support was provided to the tourism sector through a newly established Pause programme, which introduced other measures such as tax reductions and room rentals, and the creation of online platforms to help promote tourism providers. Special attention was also paid to the involvement of the population in the tourism industry. By organising



free city tours, better-promoted tourist offers (Krakow Undiscovered), and lower prices for local products, more attention was paid to attracting domestic visitors. All measures were the result of good cooperation between different levels and following changing trends (Kowalczyk - Anioł, Grochowicz and Pawlusinski, 2021).

With regard to adaptations in Slovenia, in May and June 2020, the perspective of representatives of the tourism sector - providers and managers - on preparedness and response to the pandemic was obtained, as well as their views on the impacts and the far-reaching consequences it will have on tourism. In June 2020, stakeholders estimated that everyone in the tourism sector would be affected to some extent, but especially travel agencies, tourist attractions, and event organisers (see Table 2.3). The hospitality industry was considered to be the sector that would most easily overcome the crisis, as it was able to operate to some extent throughout the quarantine period (food delivery), and because their services are used by domestic guests. It was felt that hoteliers and accommodation providers would take longer to recover than the food service industry; tourism vouchers were expected to help them to recover. There would also be a difference in the impact on hoteliers in terms of ownership and investment capacity - accommodation providers who have incurred debt for investment due to the sector's steep growth and have not yet recovered this debt before the crisis were certainly likely to be more affected. In their case, there may also be reallocations of property or sales. With regards to the differential impacts of the crisis on the private and the public sectors, according to stakeholders, both were expected to feel the effects of the pandemic. While the public sector was expected to suffer less as a result of the public funding system, it also included cultural institutions and tourist attractions, which were closed to visitors during the quarantine period and were not specifically addressed by the Slovenian Government in its 2020 measures.

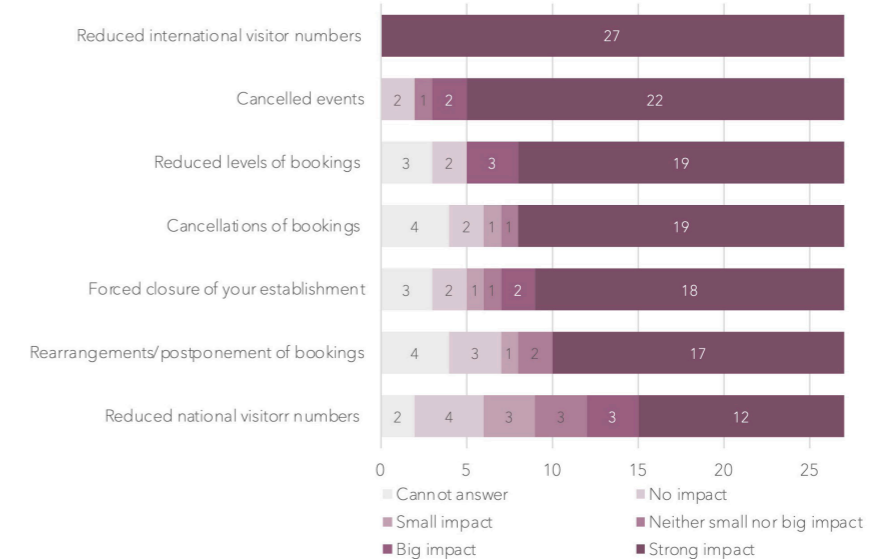
The situation after the end of the main season of the first pandemic year was further highlighted by the responses of 40 tourism providers who took part in the survey in October 2020. All 27 providers who answered the questionnaire in full were affected by the pandemic. Figure 2.19 shows their assessment of what had had the greatest impact on their activities. All agreed that it was the decrease in the number of foreign tourists due to the closure of Slovenian borders to non-urgent travel. This was followed by the cancellation of events, cancellations of bookings, reduced numbers of bookings, and forced closures. The least problematic effect was a decrease in the number of domestic tourists.

In Ljubljana (Klepej et al., 2021), the crisis caused by the coronavirus pandemic required most stakeholders to adjust their activities and develop new products (Table 2.3). While certain adjustments were required by the state in the context of anti-coronavirus regulations (closure of catering and tourist facilities, working from home, hygiene regulations and so on), stakeholders themselves also implemented certain measures to ensure regular

activities and communication with customers, and the target markets of tourism promotion also changed. Neighbouring countries such as Austria, Germany, Italy, and Hungary returned to the fore.

Stakeholders	Consequences	Adjustments	Impact
Travel agencies, service intermediaries	Less traffic, fewer consumers	Change in sales offer	Maximum
Event organisers	Event cancellations	Postponement of events into the year 2021 Vouchers worth the value of tickets purchased Business models with online offer	
Congress tourism	Event cancellations	Organisation of online events	
Tourist attractions	Closed, no visitors	New offers, new tickets, discounts	Bigger
Cultural institutions	Closed, no visitors	Creating a new offer (web)	
Airline providers	Prohibition of flights	Modified protocols Termination of certain connections	Bigger/ Medium
Hotels	Closed Transfer issues to the destination, cleaning, airing and food service and drinks *Difference according to size	Longer closure period Compliance with hygiene standards Use of tourist vouchers	
Overnight stays through the sharing economy	Mistrust in cleaning protocols Illiquidity does not allow repayment of credits	Compliance with hygiene standards Transition from tourism to housing market	
Restaurant	Closed Reduced capacity due to distance required	Delivery New systems (Wolt, eHrana) Different table layout Remain closed	Smaller
Souvenir providers	Closed	Remains closed	

**Table 2.3**  
The impact of the pandemic on different stakeholders in urban tourism and measures they have introduced to adapt to the pandemic situation (Source: Marot et al., 2020)



**Figure 2.19**  
Rating the impacts of Covid-19 on business (N = 27) (Source: Klepej et al., 2020, p. 80)



During the pandemic, companies implemented various measures to address the negative effects. Among these, the most important were connections with consumers and business partners, strengthening existing digital services and/or developing new ones, new products, and promotion in new markets. One third of companies continued with their regular promotional activities. One of the participating providers mentioned more events in public spaces, and other providers extended their activities to neighbourhoods outside the city centre where they had not been present.

Companies also changed their employment policies. Seven companies put their workers on hold with full compensation, 9 with partial compensation, 8 companies reassigned workers to new assignments, and the same number of companies made workers redundant. Other measures affecting employees include zero-hours contracts or the suspension of recruitment of new workers; planned before the pandemic. Only four companies did not change their employment policies. The vast majority of companies received assistance from the state, either in the form of financial aid for workers on hold, additional loans, or advice. In this way the pandemic reopened the role of the state in tourism, otherwise a primary economic activity (see Chapter 8 for more).

In addressing pandemic measures, research of the last two years has followed a similar pattern. In addition to more thorough and continuous collection of data, which has provided insights into the state of the tourism sector and helped to inform the decisions of the various authorities, digitisation and the use of various online platforms have come to the fore, and have made it possible to promote the (given) tourist destination and to establish communication with tourists and residents. Accordingly, cities have focused in particular on domestic tourists, who, due to restrictions, have been forced to travel to nearby places. The restrictions and measures have had a significant impact on the arrival of foreign tourists. There has also been greater involvement of residents, who, through various campaigns or new tourism products (which have also often become more affordable), have got to know their city, have been concerned about the functioning of services, and have become increasingly aware of the value and contribution of developed tourism. The tourism sector has taken various steps to restore itself to its pre-pandemic position, but this time with a stronger focus on sustainability.

## 2.8 Conclusion

The aim of this chapter was to highlight the main theoretical backgrounds of urban tourism, one of the fastest growing types of tourism before the pandemic. First, the historical development of urban tourism in the world and in Slovenia gave background to the topic. Second, the changing motives and popularity of individual destinations were revealed, including urban tourism characteristics, statistics,

and descriptions of the tourist personas. The chapter concluded by highlighting the impact of the pandemic on urban destinations. It is the urban destinations that have been most affected by the pandemic. By comparing Ljubljana and Maribor with selected Central European cities, it was concluded that they can be placed side by side, and even among the main Central European destinations not only in terms of development but also in terms of their economic and social importance. We found that Ljubljana's well-planned promotional strategy in the years preceding the pandemic had put it ahead of Slovenia's nearest neighbours and, thanks to its role as a capital city, established it as one of the main destinations in this part of Central Europe. The City of Ljubljana has transformed itself from a classic urban destination into a destination that is attractive for its lifestyle, urban transformation, and authentic products.

The text also highlights the main theoretical challenges in the field of tourism. They relate in particular to defining and describing the relationship between local people and tourists. On the one hand, tourists intervene in the everyday life of the inhabitants, occupy public spaces, and use services; on the other hand they bring international influence and vibrancy to the city. The ways in which the relationship between residents and tourists is established in a city and the dynamics of this relationship have been the subject of much recent research. Currently, the conclusion is that the boundary between tourists and residents is more and more vague, and that urban tourism no longer relies on cultural tourism. Modern urban tourism is increasingly becoming new urban tourism, and new forms of cultural tourism are also emerging, with an emphasis on experience and local-specific. The tourist thus comes to the city not to see the main tourist attractions, but mainly to consume city life, to 'hide' among the urban residents and to experience the city as a local resident. This has been made possible by changed ways of working and also by the pandemic, which has greatly increased remote working and thus enabled greater labour mobility. This trend is also supported by cities themselves, which are aware of this potential; they are orienting the promotion and content of their strategic documents accordingly. The role of urban tourism in tourism industry has been growing for a long time, although the circumstances of its development change regularly (low-budget travel, sharing economy and so on). The (slow) recovery of tourism after the pandemic also suggests that tourism will continue to play important roles in urban development and living in the future.

## 2.9 References

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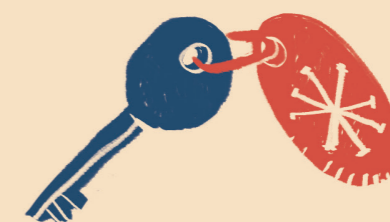




## Chapter 3

### Urban destination Ljubljana

Nina Stubičar



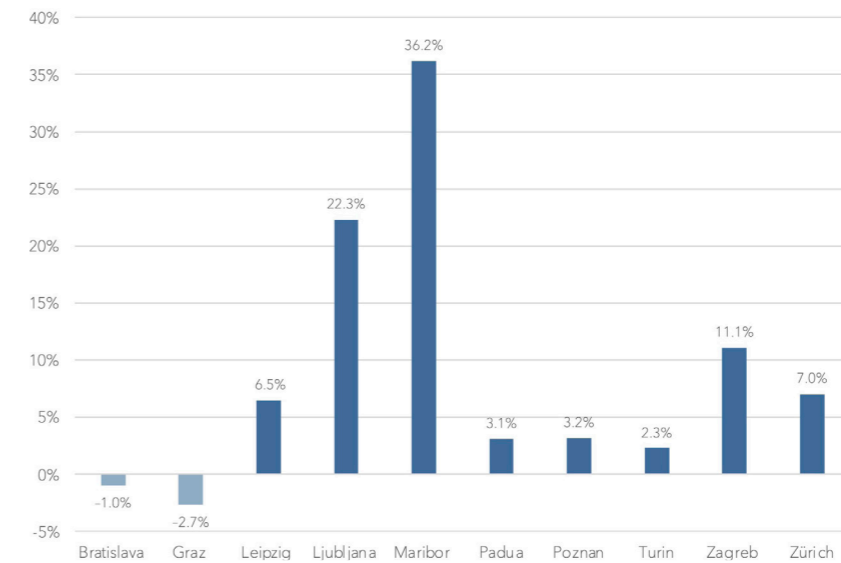
### 3.1 Introduction

Cities are living, ever-changing organisms that need a multitude of resources to function and survive, especially in an era of accelerated technological development and digitalisation. The most important of all these resources is human beings who, through their actions, also impact urban space. One of the most important impulses for the development of cities is urban tourism. As a fast-growing economic sector, which recorded a total growth of 5% in 2018, or a total of 1.4 billion international tourist arrivals (UNWTO, 2019), it intervenes with urban form and the physical appearance of cities, while also steering the overall development of cities at the strategic and management levels. Urban tourism is thus defined as a global multidimensional phenomenon that attracts different types of visitors to tourist destinations (Bellini and Pasquinelli, 2017). A global view shows that Europe produces the largest share of international tourist arrivals (51% in 2018) (UNWTO, 2019), with London (85.1 million), Paris (52.5 million), Berlin (34.1 million), Rome (29.7 million), Madrid (20.7 million) and Vienna (18.6 million) accounting for the largest number of overnight stays in 2019 (Statista, 2022). In addition to these well-known destinations, urban destinations with smaller spatial and touristic scales, such as Bologna, Zagreb, Ljubljana, have gained places on the global tourism map over the last few years (Klepej and Marot, 2021). Their growing popularity is attributed to changed perceptions of holidays and travel and the growing interest shown by investors in the development of the tourism industry.

In this chapter, we place Ljubljana alongside similar Central European destinations. The statistics show rising numbers of international arrivals; in some cities, rates have increased by more than 50% in the period 2013-2018. Among these, Ljubljana (+112%) and Maribor (+97%) recorded the highest increases, followed by Bratislava (69%), Zagreb (68%) and Turin (52%) (Klepej and Marot, 2022). Destinations are also strengthening their recognition by obtaining various global and European titles, such as European Green Capital, European Capital of Culture, UNESCO City and UNESCO World Heritage Site; such accolades place them on the global map and further contribute to their promotion at a transnational level (Koufodontis and Gaki, 2022; West, 2022).

As can be seen from the report by Klepej and Marot (2021), the selected cities share not only spatial and demographic dimensions, but also tourism scopes. For example, the number of inhabitants ranges from 110,000 to 880,000 and if we put Ljubljana in this context, it ranks sixth with almost 290,000 inhabitants; only Graz, Padua and Maribor have fewer inhabitants. In terms of tourist nights per inhabitant, Ljubljana is followed by cities with at least double the amount of inhabitants (400,000 or more). Zurich, for example, has the highest number of tourist nights per inhabitant (12.8 nights and 409,000 inhabitants), followed

by Padua (7.9 nights and 409,000 inhabitants), Ljubljana with 7.5 tourist nights per inhabitant, Bratislava (62 nights and 430 thousand inhabitants), and Leipzig and Turin with 5.8 nights. Despite the high share of overnight stays per inhabitant, the results of the survey showed, among other things, a shortage of bed capacity and a correspondingly higher demand for alternative categories of accommodation; confirmed by AirDNA data (AirDNA, 2020) relating to sharing economy accommodation (Figure 3.1).



**Figure 3.1**

Shares of total overnight stays in selected cities between years 2018 and 2019 (Source: ECM, 2020)

By reviewing the European context of tourism development in similar cities, we have introduced a more detailed analysis of the situation and development of urban tourism in Ljubljana. The Ljubljana City Profile (Marot et al., 2021) was prepared in order to provide an insight into the basic characteristics of urban tourism in Ljubljana, and provides the basis for the more detailed analysis presented in Section B of this monograph. We have carried out a very detailed review of the main tourism statistics for the period 1960-2021, including data on the number of tourists, overnight stays, the ratio of domestic to foreign tourists, and the length of stay of tourists. We present the types of tourism present in Ljubljana, and the types of tourists arriving in Ljubljana, and summarise the results of surveys carried out by the Statistical Office of the Republic of Slovenia and the MESTUR project (Marot et al., 2022) and SPOT (Klepej et al., 2021). In order to obtain a comprehensive view of Ljubljana as a tourist destination, we also examined the impact of tourism development on employment in the tourism sector. In this chapter, we are interested in the characteristics of urban tourism and tourists in Ljubljana, how these are reflected in the development of existing and new supply, and the city's inhabitants. This chapter, which is essentially descriptive, thus presents Ljubljana as an urban destination in a comprehensive way.

### 3.2 Brief historical development of the city with a focus on tourism

In order to understand the development of urban tourism and the reasons for the city's recognition at a global level, we need to know some of the basic features that have influenced the city's breakthrough onto the global tourism map. Particularly in the case of European cities, we can talk about the different political and social eras that have created the most tourist-oriented corners of the world. Ljubljana, as the political and administrative centre of the Central Slovenia region - with its strategic location in the Ljubljana basin - is situated at the crossroads of main transport routes and at the junction of the Ljubljanica and Sava rivers. On the one hand, it is a starting point for tours of the Alps, discovery of wine traditions, and strolls along the coast; on the other, it is a centre of cultural and economic activity and a reference for the development of urban tourism for other Slovenian cities. This is also influenced, to a certain extent, by its predominantly continental climate, which, with its changes of season, enable a diversity of tourist products.

Ljubljana's diverse history, which has evolved under the influence of different empires, countries, and authorities since 2000 BC, together with its cultural diversity, has been a lever for the development of the destination. The city's history is reflected in the remains of the bridge-builder's dwellings, the Roman Empire, in the image of the beginnings of medieval urbanism, and in the influence of various artistic periods, with the Baroque, Renaissance, and Art Nouveau periods being the most prominent. The biggest leap in development took place in the 19<sup>th</sup> century, when the tramway was established alongside existent water and electricity infrastructure, and with the collapse of the Austro-Hungarian monarchy in the 20<sup>th</sup> century when the city became the administrative and political centre of the country, attracting more and more visitors with its appearance and the development of its economy. Along with the redefinition of leisure and the development of the automobile, tourist infrastructure developed in the period 1950-1960 (Banaszkiewicz et al., 2017; Yeomans, 2010). Hotels and other forms of accommodation, in addition to their basic function, were social centres for inhabitants. The construction of hotel infrastructure peaked in the period 1960-1985, when the number of beds in the whole country increased by 150%, while in the period 1964-2019 in Ljubljana, bed capacities increased by only a good tenth (+12%) (Klepej and Marot, 2021). The twentieth century was a period that witnesses the more visible development of cultural tourism, with an emphasis on visits to cultural institutions and events (Klepej and Marot, 2021). With a majority of day visitors, business tourism started to develop alongside cultural tourism (MOL, 2020; Figure 3.2).

The beginning of the 21<sup>st</sup> century marked the start of more intensive period of development for the tourism industry and led to the establishment of the Ljubljana Tourism Public Institution in 2001. The activities of the institution were, and still are, focused on the promotion of

the tourist destination, the establishment and management of a network of tourism stakeholders, the establishment of tourist information points, and cooperation with the Congress Bureau. Until the pandemic period, Ljubljana, on the basis of the activities of the above-mentioned institution, successfully developed and marketed, in particular, tourist attractions in the city centre, which, as we can read in Chapter 6, led to an excessive concentration of tourists in the city centre. In recent years, therefore, the focus has been on the development of tourist products, such as alternative tours, which would take tourists to other neighbourhoods in the city centre as well as the wider region (Stubičar and Marot, 2019).



**Figure 3.2**

The sights of Ljubljana  
(Author: David Klepej)

The population, which exceeds that of other cities in Slovenia (294,054 inhabitants in 2022) (SURS, 2022a), indicates Ljubljana's role as a national capital and service centre. This also explains the high population density (1,068.3 inhabitants/km<sup>2</sup>), which exceeds the national population density (104 inhabitants/km<sup>2</sup>) (SURS, 2022a), and conditions urban planning decisions for the city. In this context, one of the key physical characteristics of urban tourism is the transformation of the urban fabric; the need to make it attractive to different types of visitors. In Ljubljana, for example, the main urban trajectories that are still visible and recognisable today were defined by design decisions in the 19<sup>th</sup> and 20<sup>th</sup> centuries, which were most often driven by the need for func-



tionality, and only then aesthetics. The pre-designed medieval streets and the open spaces of the Roman empire created intimate spaces that meander through the narrow streets into the planned open spaces of the city. Despite the established urban structure, the spaces have been involved in renovation and renewal projects, particularly in the last decade, which have sought to improve accessibility and walkability. In these projects, the main focus has been on pedestrians and cyclists as traffic management follows the principle of the reversed traffic pyramid (IPoP, 2016). This is reflected in the development of zero-traffic streets, areas closed to traffic, and the promotion of public transport that prioritises more vulnerable user groups (MOL, 2012). In addition to transport improvements in the city centre, there have also been new investments in tourism infrastructure, which are described in more detail in sub-chapter 3.5.1 and Table 3.2.

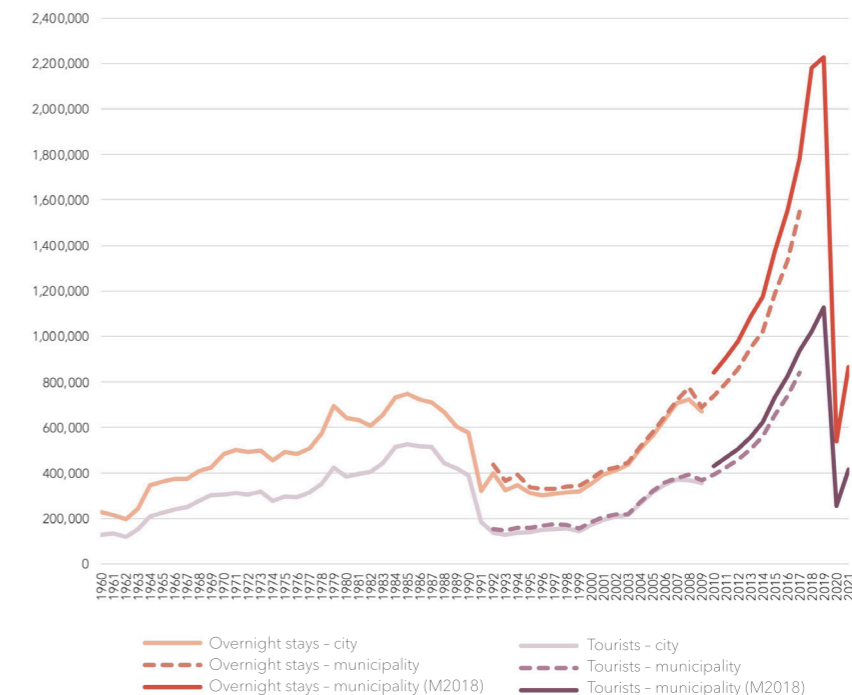
### 3.3 Scope and characteristics of tourist arrivals

#### 3.3.1 Number of tourists and overnight stays

Like any urban destination, Ljubljana has evolved through different phases of tourism development; since the 1970s these have been associated with major political changes and crises, such as the most recent pandemic. Figure 3.3 shows the number of tourists and overnight stays (in thousands) between 1961 and 2021, and evidences a clear increase and decrease in the number of tourists and overnight stays in the years of major change. The period from the early 1960s to the end of the 1980s is perceived as a stable period of gradual tourist development. The first peak of development was in the mid-1980s, when the number of tourists and overnight stays almost quadrupled (overnight stays from 200,000 to 750,000 and the number of tourists from 130,000 to 525,000). Tourist arrivals in that period were mainly linked to hotels and similar accommodation establishments. The largest share of tourists were foreign tourists from other republics of the former Yugoslavia, and led to the development of business and transit tourism. The first tourism crisis, linked to the collapse of the former Yugoslavia and the war in the Western Balkans, marked the period of the 1990s.

The rebound of the tourism sector at the turn of the millennium is evident. In parallel with the development of the Ljubljana Tourism Board, which was responsible for the development and marketing of products, the destination's offers were developed, improved, and upgraded. The development of tourism in this period can be attributed to the stabilisation of the conditions in the Western Balkans, Slovenia's accession to the European Union in 2004, and the adoption of the European currency in 2007. In line with these political and national changes, the development of the tourism sector was accompanied by an upgrading of tourist infrastructure. This, in turn, led to the development of the city as a transit destination, with consequences that are also of interest at an international level. Since the beginning of the 21<sup>st</sup> century, Ljubljana has seen a constant increase in the number of tourists each year, and

has also benefitted from the development of various products and other, mainly private, accommodation (Airbnb), the upgrading of tourist infrastructure, and an increase in the country's transit capacity and the number of airline flights. The number of tourists (Figure 3.3) before the start of the pandemic in 2019 was 1,127,904 tourist arrivals; this marked the beginning of the phenomenon of overtourism in the destination. This figure dropped drastically with the outbreak of the Covid-19 pandemic in 2020, reaching a similar level of tourism to that recorded in the 1970-1975 period.



**Figure 3.3**

Number of tourist and overnight stays in Ljubljana between 1961 and 2021 (Source: Survey results 1961-2001, SURS, 2022b, c, d and e)

Note: Data between 1961 and 2007 refers to the city of Ljubljana, between 1992 and 2021 refers to City Municipality of Ljubljana. Data between 2010 and 2021 is also calculated by the new methodology SURS (M2018). See methodological note SURS: <https://www.stat.si/StatWeb/File/DocSysFile/7779>.

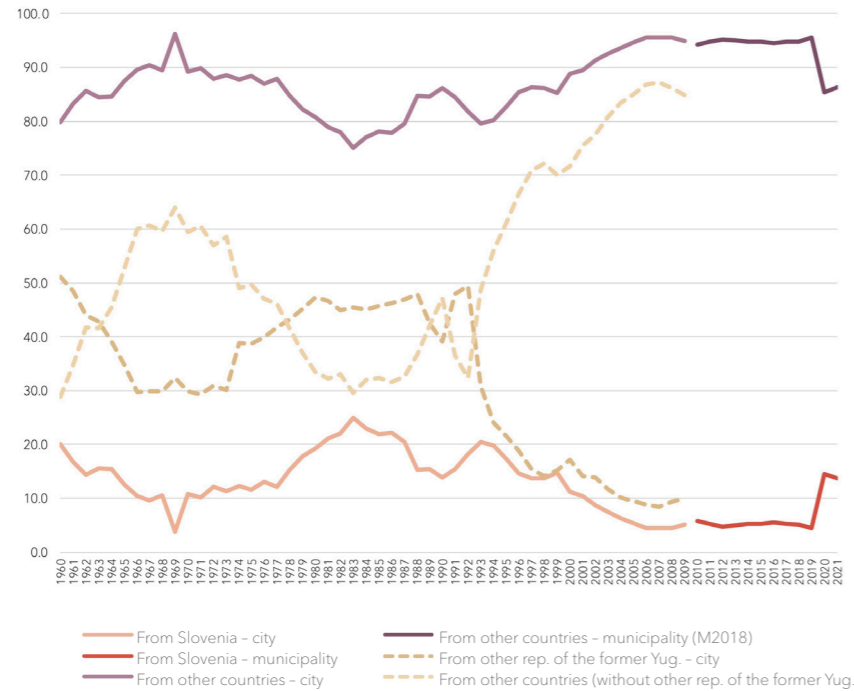
In addition to the previously mentioned factors, the increase in tourist arrivals can be attributed to the destination's increasing integration into the international environment. Over the last twenty years, Ljubljana has established itself as an international green destination; its small size enables comfortable travel to the destination and its surrounding areas. The development of airlines and the proximity of the airport have attracted an increasing number of foreign tourists who have chosen Ljubljana as a final destination for a short city break or as a starting point for visiting other Slovenian destinations or neighbouring countries. The increase in tourist arrivals after 2000 was reflected in an increasing share of overnight stays by foreign tourists and a stagnation in the share of overnight stays by domestic tourists (5%). A comparison of the shares of foreign and domestic tourists (Figure 3.4) shows the largest fluctuations between tourists from the former Yugoslavia and from other countries, with the largest changes occurring after Slovenia's independence. The share of tourists from these groups of countries reversed during this period. The share of tourists from the former Yugoslavia was higher in the decade before Slovenia's independence, but fell significantly after



**Figure 3.4**

Share of overnight stays of domestic and foreign tourists in Ljubljana between 1960 and 2021 (Source: Survey results 1971-2001, SURS, 2022a, c and d)

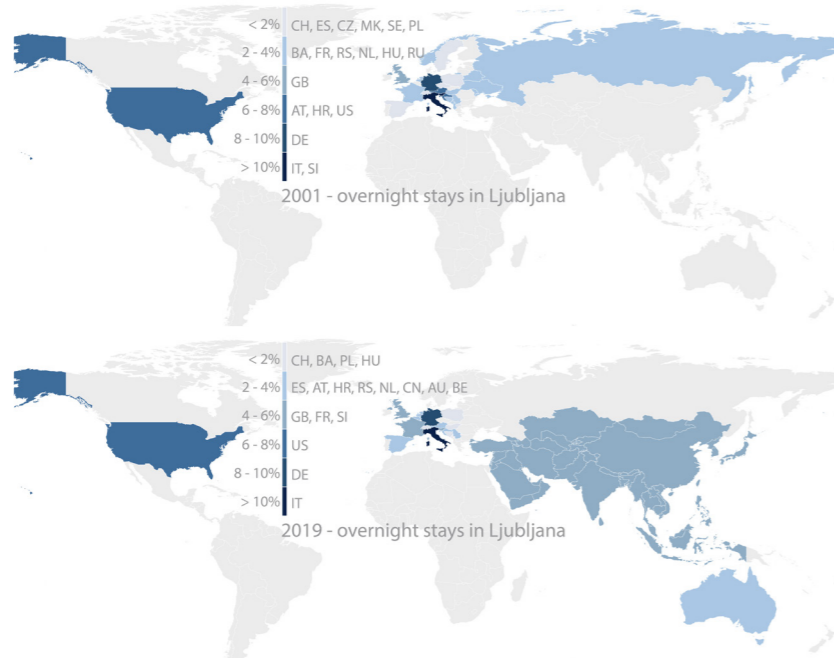
Note: The data series between 1960 and 2009 refer to the city of Ljubljana, while between 1992 and 2021 it refers to the City Municipality of Ljubljana. Between 2010 and 2021 the data is calculated according to the new SURS methodology (M2018). Tourists from other republics of the former Yugoslavia are shown in the category "From other countries" throughout the period, and also separately (broken line) in the period 1960-2009.



**Figure 3.5**

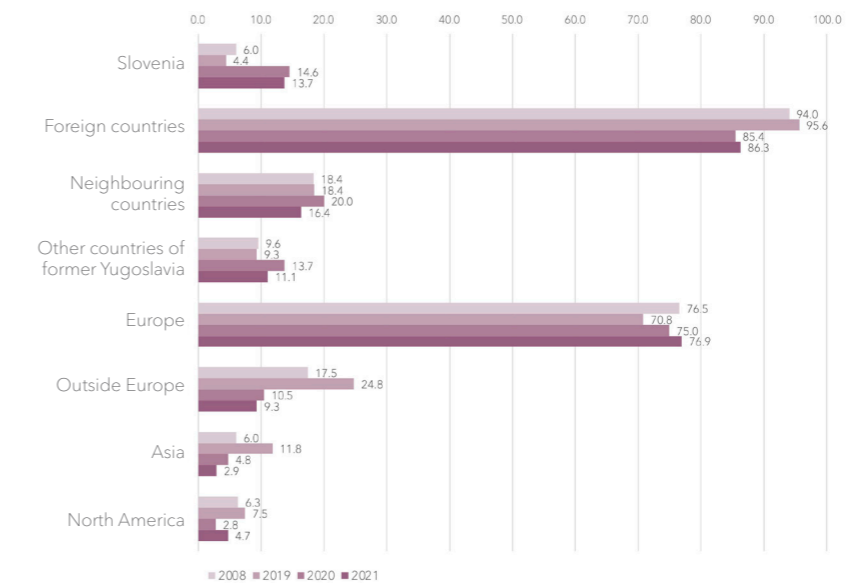
Share of overnight stays of tourists from the 20 countries with the highest share of overnight stays in Ljubljana in 2001 and 2019 (Source: SURS, 2019a, b, c)

Note: Data for 2001 are collected based on the old methodology, while for 2019 they are based on the new SURS methodology (M2018). See SURS methodological note: <https://www.stat.si/StatWeb/File/DocSysFile/7779>.



independence, while the share of tourists from foreign countries (not including the former Yugoslavia) increased drastically. This change was a consequence of the country's independence and the performance of the Ljubljana Tourism Board.

The increasing share of overnight stays by tourists from 20 countries (Figure 3.5) reveals in more detail that, at the beginning of the 21<sup>st</sup> century, nearby European countries distinguished themselves with a share of up to 10%; only Italian and domestic tourists contributing more than 10%. If the share of domestic tourists was at its highest in 2001, the trend in 2019 was rather different. Domestic tourists were in seventh place, confirming the change in the approach to destination marketing and also indicating a shift in the motives and destinations of domestic tourists. In 2019, Italy (10%), Germany (9%) and the USA (6%) occupied the top three positions with shares ranging from 6% to 10%.



**Figure 3.6**

Share of overnight stays in Ljubljana 2008 to 2021 by area of arrival of tourists (Source: SURS, 2022b and c).

Note: Data refers to the City Municipality of Ljubljana. Category "Foreign" also includes tourists from other republics of the former Yugoslavia.

In the years immediately before the pandemic, visits from non-European countries increased significantly. In 2019, tourists from other continents accounted for as much as 26% of all tourists and 25% of all overnight stays. In particular, the number of tourists from Asia increased significantly. In 2019, Ljubljana recorded around 40,000 tourists from China, 16,000 from Korea, 74,000 from other Asian countries, 61,000 from the USA and more than 10,000 from Australia, Israel, Japan, Brazil and Canada.

Just over 85% of overnight stays in the last ten years were accounted for by tourists from foreign countries, including the countries of the former Yugoslavia. Interestingly, the shares of overnight stays in 2008 and 2019 are quite similar, i.e. higher than, for example, the shares in 2020 and 2021; this is most likely the result of the Covid-19 pandemic. The same applies to European tourists, while the shares of overnight stays by domestic tourists and tourists from neighbouring countries were highest in 2020 (Figure 3.6).

**3.3.2 Seasonal distribution of tourist arrivals**

The seasonality of tourist arrivals in the period 2010-2019 changed in line with the development and upgrading of tourist offers. The number of tourists has increased every year, while the number of domestic tourists has remained relatively similar. The peak tourist season during the period described was always the summer season, i.e. from July to September. The second peak season, which became particularly pronounced in December, can be attributed to the growing pre-holiday atmosphere, accompanied by the decorating of the town and the installation of stalls with a variety of culinary offerings.

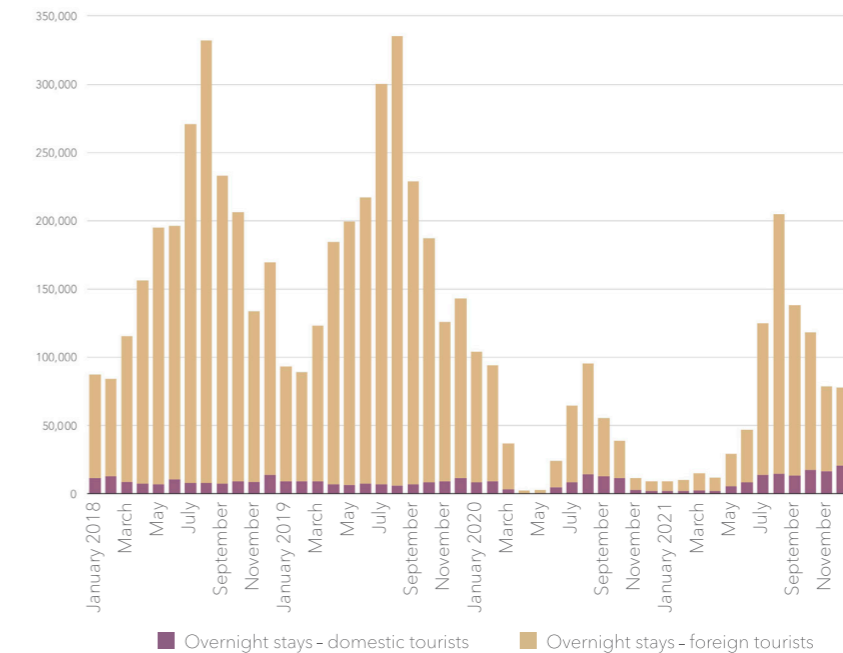
The seasonal distribution of overnight stays in 2020 and 2021 was strongly affected by the pandemic, as tourism, like other activities, was subject to various restrictive measures. The number of overnight stays by domestic and especially foreign tourists (Figure 3.7) showed positive trends in 2018-2019, while the same indicator showed a significant decline from March 2020 to April 2021. The significantly lower figures are due to the closure during the pandemic, reduction of tourism activities and availability of accommodation capacities. The lowest number of overnight stays was in the period April-May 2020, when the country completely closed down as a consequence of the start of the pandemic in March 2020. The most interesting aspect of the situation is the ratio of domestic to foreign tourists. The second wave of the pandemic, although it lasted the longest (November 2020 to April 2021), did not cause as severe a decline in overnight stays as the first wave, but the numbers were still remarkably low. Similar to 2020, activities opened in the summer season of 2021, leading to an almost 50 per cent increase in the number of overnight stays.

**3.3.3 Average length of tourist stay**

The average length of stays of domestic and foreign tourists (Figure 3.8) in Ljubljana was rather stable in the period 1961-1980. The average length of stays was 1.8 days. Most of the overnight stays were done by domestic visitors predominating until the end of the 1970s, but in the 1980s this share decreased to an average of 1.3 days. With the changes leading to independence in 1991, the length of stays of domestic visitors increased to 1.5 days and that of foreign tourists to 1.8 days. The peak was recorded in 1992, when the length of stays increased by an average of 1.3 days, i.e. 3 days for domestic tourists and 2.9 days for foreign tourists. Two more peaks in the length of stays of domestic tourists occurred in 1964 (1.8 days) and 1976 (1.7 days), but after the year 2000, the length of stays of foreign tourists has since then continuously prevailed, with an average length of stay of 2.0 days.

Based on the average length of stays, prevailing offers and the profile of foreign tourists, Ljubljana has established itself in the last decade as a "city break" destination, a starting point for visiting the sights of other places and countries, and an excursion point for foreign tourists. On average, tourists stay in Ljubljana for 1.8-2.0 days. For example, foreign tourists stayed an average of 2.1 nights in Ljubljana in 2019, while

Slovenian tourists stayed almost 1.9 nights in Ljubljana. In the last five years in particular, Ljubljana Tourism has strived to increase the length of stays of foreign tourists, which - according to the data - has not been successful. In fact, they have not been able to extend the length of stays of tourists and reach the target of three days. However, in the last five years, the length of stays has stabilised at 2 days. In 2001 and 2019, only representatives from more distant European countries (Finland, Iceland, Malta) or from other non-European countries stayed in Ljubljana for more than two days.



**Figure 3.7**  
Number of overnight stays of domestic and foreign tourists in Ljubljana in the period between 2018 and 2021 (Source: SURS, 2022f and g)

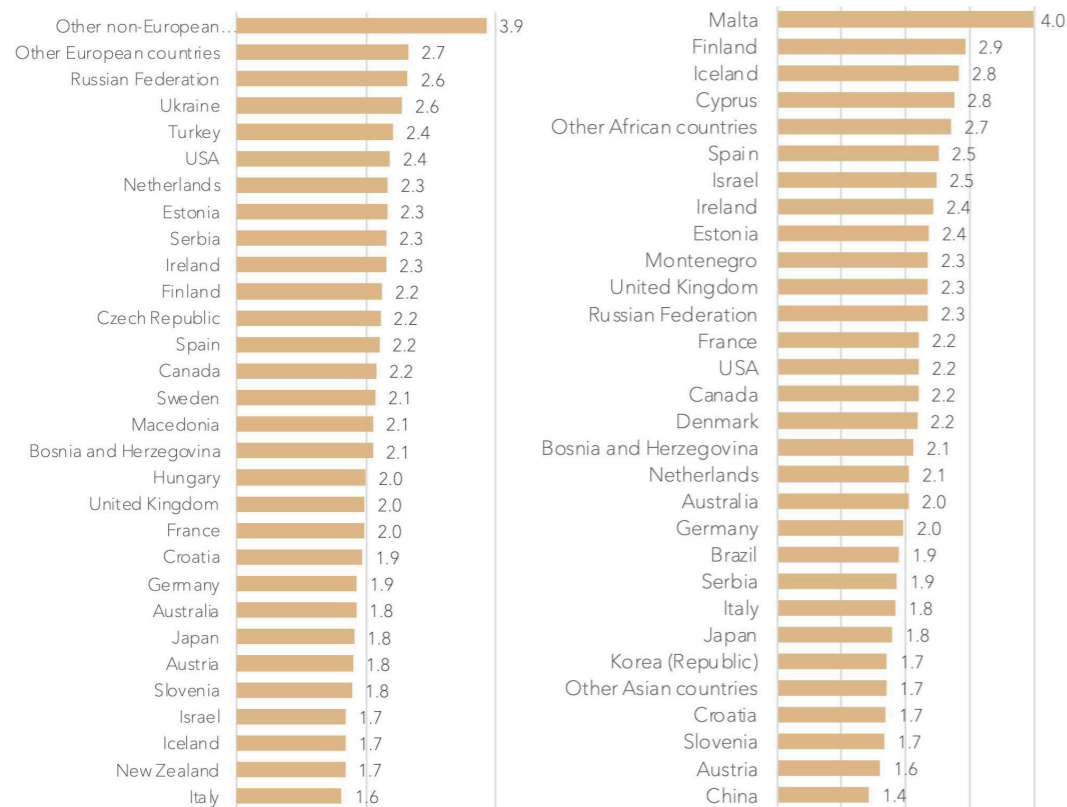


**Figure 3.8**  
Average length of stay (days) of tourists in Ljubljana between 1960 and 2020 (Source of data: SURS, 2022b, c and d)

Note: The data between 1960 and 2009 refers to the City of Ljubljana, and between 2010 and 2021 to the City Municipality of Ljubljana, and were calculated according to the new methodology. Tourists from other republics of the former Yugoslavia are shown in the category "From Other countries".

### 3.3.4 Overnight stays in Ljubljana during the Covid-19 pandemic

In the last pre-pandemic year, 2019, Ljubljana contributed 14% of all tourist beds in Slovenia, 14% of all overnight stays, and 17% of all tourists who stayed at least one night in Slovenia (Figure 3.9). However, after intensive growth over the last two decades, the Covid-19 pandemic changed the situation significantly in 2020.



**Figure 3.9**

Average length of stay for tourists from selected countries in Ljubljana in 2001 (left) and 2019 (right) (Source: SURS, 2019a, b, c)

Note: Data for 2001 is collected according to the old methodology and for 2019 according to the new SURS methodology (M2018). See SURS methodological note: <https://www.stat.si/StatWeb/File/DocSysFile/7779>.

Slovenian tourism recorded, in year 2019, 51% fewer arrivals and 42% fewer overnight stays than in 2019. While foreign tourist arrivals fell by 74% and overnight stays by 71%, the season was partly 'saved' by domestic tourists. The number of domestic tourist arrivals from Slovenia increased by 21% compared to the previous year, while the number of overnight stays increased by 33%, as the summer season was mainly supported by domestic tourists through the so-called "tourist vouchers" introduced by the Slovenian Government to help the tourism economy. They were mainly used in seaside, mountain, and spa resorts, while demand in urban areas was relatively low. According to the Financial Administration of the Republic of Slovenia, between 1,000 and 2,000 tourist vouchers were redeemed in Ljubljana, which was less than half the number recorded in seaside resorts where between 4,000 and more than 10,000 vouchers were redeemed (FURS, 2020). Although Ljubljana is a well-developed tourist destination with a wide range of facilities, during the pandemic outdoor leisure activities came to the centre of attention due to restrictions upon indoor socialising.

As a result, tourist arrivals in Ljubljana in 2020 fell by more than three-quarters compared to 2019; a greater decline than during Slovenia's transition to independence between 1990 and 1992 (by two-thirds). As a result, Ljubljana's share of all tourist arrivals in Slovenia decreased again. It decreased to 8% of all tourists and 6% of all overnight stays in Slovenia; the same level as that recorded in 2000.

### 3.4 Types of tourism and visitors

In the past Ljubljana developed mainly as a cultural centre of Slovenia, but in recent years it has sought to establish itself as a European cultural tourist destination. The development of cultural tourism as the main type of urban tourism can be attributed to its strong historical and architectural character, and in line with this, there has been an historically strong emphasis on the promotion of cultural institutions, especially galleries and museums. For example, in 2017, the Slovenian Tourist Board published the brochure Cultural Experiences Slovenia (STO, 2017a), which presented the cultural and natural heritage as well as the sights and local specialities of Slovenian cities. In recent years, Ljubljana has developed not only cultural tourism, but also branches of culinary, congress and business tourism, as well as location-specific tourism. The development of gastronomy at the level of culinary festivals, together with the small size of the city, has also contributed to the development of Ljubljana as a congress and business destination. All these types of tourism are identified as urban tourism and are also represented as products in Slovenia's macro destinations as elaborated upon in the national tourism strategy.

Macro destination model offer a comprehensive approach to the marketing of tourism products, the establishment of communications at national and international level, and a way of strengthening the identity of a city (STO, 2017b). Ljubljana, as Slovenia's strongest tourist destination, belongs to the macro destination of Central Slovenia and Ljubljana and is based on four supporting products. The macro destination of Central Slovenia and Ljubljana is the most important tourism destination in Slovenia. The first product is defined as seasonally limited business meetings and events, such as conferences, and motivational or other meetings, and support events that attract business guests for several days. The second product is culture and also includes the notion of city breaks and discovering the city, based on its rich history, festivals and events, as well as its contemporary and alternative art offerings. Circular trips - as the third product - are characteristic of Ljubljana, as it often serves as a starting point for discovering the rest of Slovenia. The last product is culinary tourism. The main products, of lesser importance and scope, are supported by secondary products. Secondary products include: outdoor, shopping, special interests, nature experiences, gambling and sports tourism. The supporting and secondary products are dictated by the types of tourism in Ljubljana, which are presented in more detail in Table 3.1.

Type of tourism	Key characteristics	Key offer	Who it attracts	Level of development
Cultural	History and culture of the city (sights, cultural institutions, contemporary art)	Ljubljana Castle, National Museum (the oldest musical instrument), City Museum Ljubljana (the oldest wooden bicycle), National Gallery, Modern Gallery, Plečnik's house	Domestic, foreign visitors, day visitors with an interest in history and culture	3
Architectural	City architecture and an overview of the historical periods of urban development	Plečnik's Ljubljana, Art Nouvea, Dragon bridge, Prešern square, public spaces	Tourists with an interest in architecture	2
Gastronomy	Culinary festivals, local and other food offers	Odperta kuhna, restaurants in Michelin guidebook, Market, Beer experience Ljubljane, Gourmet Ljubljana, Ljubljana wine route, dinner in the castle vineyard, Distillery tour Broken Bones	Tourists with a motive to learn about different, especially local, tastes, insight into food preparation and experience of the location	4
Business	Conferences and meetings also at international level	Congress/conference centres: Gospodarsko razstavišče, Cankarjev dom, Grand hotel Union, Hotel Lev, Intercontinental Ljubljana, Kristalna palača	Individual tourists or guests with business, educational or research motives	3
Sports	Sports activities and events, recreation outside or inside the city, hosting of sports events	Krajinski park Tivoli, Rožnik, Šišenski hrib, Bike park Ljubljana, Brko tura, Plečnikova kolesarska pot, Pot spominov in tovarištva	Tourists visit the destination for other purposes, sports tourism is an added value of the city	2/3
Shopping	Shopping centres, specialised and boutique shops selling local products	BTC City Ljubljana, Galerija Emporium, Plečnik's Market	The purpose of a visit to a destination is shopping, usually for day visitors	2/3

**Table 3.1**

Types of tourism with main characteristics, offer and type of tourist

Level of development: 1-potential not fully utilised; 2-potential weakly utilised; 3-potential partially utilised; 4-potential already fully utilised

Table 3.1, in addition to presenting the types of tourism in terms of their main attractions and supply, also provides an assessment of the potential of each type of tourism for further development. As can be seen, the potential of culinary tourism is almost fully utilized, as shown by the almost majority of developed tourist products, such as Odperta kuhna, Market, Gourmet Ljubljana, and so forth. Cultural tourism, although a traditional type of tourism in Ljubljana, has not yet fully exploited its potential; there is a lack of globally known attractions that could attract foreign visitors to existing cultural institutions (Figure 3.10). A similar situation can be seen in the case of business tourism. The existing conference centres (the Economic Exhibition Centre, the Grand Hotel Union, and so on.) are sufficiently developed to organise conferences and meetings, even at an international level, but their capacities are not sufficient to organise large-scale conferences.

**Cultural tourism** is the most promoted and widespread type of tourism in Ljubljana; this can be attributed to city's rich history, focusing on three main historical periods: the Renaissance, the Baroque, and the Art Nouveau, and the fact that the city is the capital of the country. A large part of the city's tourist offers in this regard are based on its well-preserved tangible and intangible heritage which embraces various monuments, archaeological remains (mainly linked to the Roman Emona period) and also architectural buildings which are included, to a large extent, in the European Art Nouveau Cultural Tour. In accordance with the Local Self-Government Act, the City Municipality of Ljubljana also prioritises the protection of cultural heritage, which is being promoted as a tourist product in cooperation with three major stakeholders in the field of art and culture: the Ljubljana Museums and Galleries, the International Centre of Graphic Arts, and Ljubljana Castle. As part of the promotion of cultural heritage as a cultural tourism product, they are working in partnership with the Ljubljana Tourism Board. The protection and preservation of cultural heritage is primarily the domain of the Institute for the Protection of Cultural Heritage which evaluates and prepares proposals for entries into the Register of Cultural Heritage; managed and supervised by the Ministry of Culture.

The Ljubljana Tourism Board is currently actively developing a tourist product of cultural quarters, which would attract visitors from the city centre to wider areas of the city, and thereby relieve pressure on the city centre. The pilot quarter of this project is Kino Šiška and its surroundings, and in the future the development of this product will also include the city districts of Bežigrad, Vič and Moste, with their specific characteristics, such as: modernist neighbourhoods, lifestyle and the cultural and artistic activities of individual or collective stakeholders (Visit Ljubljana, 2022).

One of the sub-sectors of cultural tourism is architectural tourism; based on architectural buildings. In this type of tourism, one of the best known and promoted products is Plečnik's works, which were included on the UNESCO World Heritage List in 2021. The nomination of his works was led by the Museum of Architecture and Design under the Ministry of Culture, and roughly includes the embankments of the Ljubljanica River with bridges, the National and University Library, the Congress Square and Park Zvezda, the Roman Wall, and the Žale Cemetery (ZAPS, 2021). In addition to the planned preservation and protection of architectural heritage, being included on the UNESCO list provides added value in the promotion and marketing of Ljubljana as an urban destination. As part of architectural tourism in Ljubljana, thematic tours are organised which, in addition to architectural works, also reference other influences and contributors to Ljubljana's urban planning.

In addition to culinary festivals and events, **culinary tourism** is best known under the Gourmet Ljubljana brand. The small open spaces in the Old Town are an attractive setting for tourists to discover the main characteristics of the destination while enjoying its food. In this con-



text, we can refer to 'place-based tourism', or location-specific tourism, which, as a new concept in urban tourism, does not yet have an agreed definition. While various authors have referred to specific aspects of this type of tourism, it generally refers to a visit to a destination based on the experience of an authentic environment (Krošelj, 2020), including culinary experiences. These are accessible through various events, e.g. Odprta kuhna, the Wine Festival and others (SPOT, 2021). Culinary tourism is seasonally limited to the period from late spring to early autumn. In addition to the Odprta Kuhna, tourists can visit a market, a brewery, a wine distillery, a wine trail, and gourmet evenings or restaurants of different classes (see Chapter 6).

**Business tourism**, unlike culinary festivals and events, is a seasonally unlimited type of tourism. Ljubljana, with its smaller scale but well-developed tourist infrastructure also offers the possibility of organising international events and business meetings. Business tourists can also use the other tourist offers such as sightseeing, visiting galleries and museums, and so on. Although Ljubljana is a well-developed business destination and both business and congress tourism are one of the main products of the macro destination, the lack of accommodation facilities makes comparison with major European destinations such as Vienna, Lisbon, London and others almost impossible.

**Sports tourism** is one of the less important types of tourism. In addition to leisure recreation in parks, green spaces and landscaped recreational areas, it generally includes the organisation of sporting events of national or European importance, which can attract a large number of domestic and foreign visitors. Recently, Ljubljana has been intensively integrating the possibility of spending leisure time in nature into its offers, promoting the green areas of Rožnik, Tivoli Park and Grajski Hill, while the Ljubljanica and Špica embankments in the city centre have been referred to as a recommended place for a stroll. Recreational walking or cycling tours include the Path of Remembrance and Comradeship and several other trails linking the city to the surrounding area.

**Shopping tourism**, unlike sports tourism, is a type of tourism that is more suited to the city. It includes visits to large and well-known shopping centres, as well as specialised boutique shops with local offers. In Ljubljana, the large BTC shopping centre and the entire shopping complex, which in the last year also opened an Ikea, has been relocated to a business centre in the north-eastern part of the city. The entire complex, which can accommodate around 300,000 visitors, attracts not only domestic visitors (80% from Ljubljana and its surroundings) but also foreign visitors from neighbouring countries, mainly Croatia. The majority of foreign visitors are also day visitors who spend a lot of money. The centre is mostly visited for small boutique and specialised shops selling local products and produce; such offerings mainly attract foreign tourists with their relatively higher purchasing powers.



**Figure 3.10**  
Tourist offers in Ljubljana  
(Author: David Klepej)

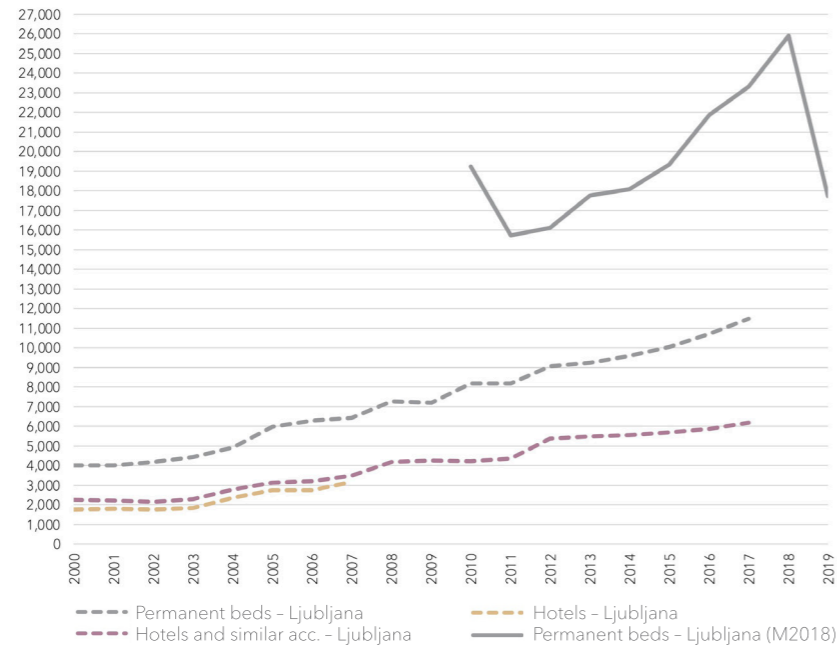
### 3.5 Accommodation capacities

Accommodation facilities are a key element of tourism infrastructure. The development of accommodation in Slovenia dates back to the 1960s. In the period 1960-1980, the total number of beds in Ljubljana almost doubled, to a total of almost 4,500 beds. For example, the number of beds in hotel and similar accommodation increased by 60-70% in the 1970s and 1980s, and by 70-85% in the crisis of the 1990s, when most of complementary accommodation facilities closed, resulting in a decrease in the total number of beds to 3,500 (Horvat and Stubičar, 2021).

The new millennium with its modernisation of, amongst other aspects, tourism infrastructure, has witnessed a growth in hotel and non-hotel accommodation, with the number of beds available rising from 4,000 2000 to 11,500 in 2017, while the number of beds in hotels stagnated at 6,200 in the same year. However, with the new SURS methodology, which also included beds in private rooms and apartments that are part of the sharing economy (Airbnb), there was a larger deviation in the number of beds in 2018, which, according to this data, although not directly comparable with previous methodology, amounted to 23,300 tourist beds, as shown in Figure 3.11 (Horvat and Stubičar, 2021).

**Figure 3.11**  
Number of tourist beds in Ljubljana between the years 2000 to 2019 (Source: SURS, 2019d, e, f)

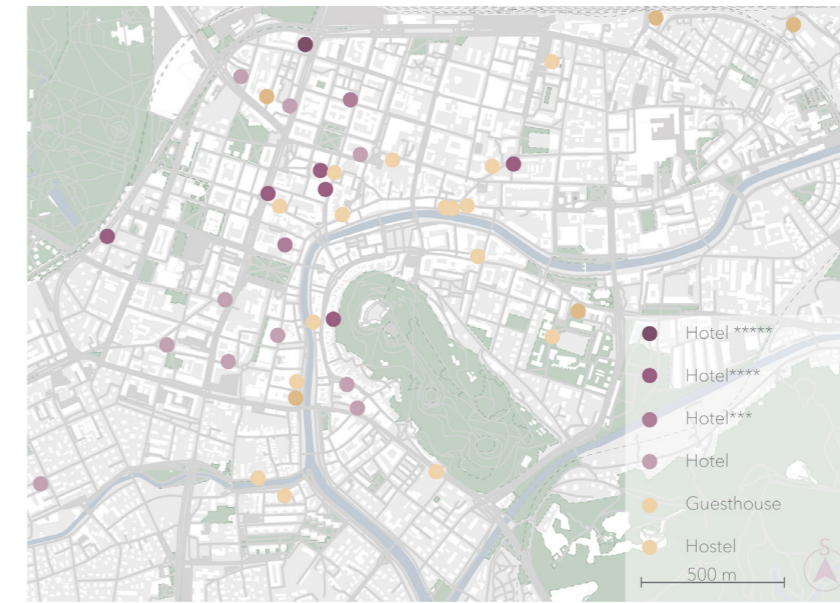
Note: Data for the period between 2000 to 2017 was collected using the old methodology, for the period between 2010 and 2019 the data was collected using new methodology. See SURS methodological note<sup>1</sup>.



<sup>1</sup> Following the implementation of the new methodology, SURS uses classifications of the type of accommodation establishments, which is in line with the Hospitality Act. When publishing monthly data at the level of municipalities, the data on tourist arrivals by type of accommodation establishment is shown only for the following three aggregated groups (categories): 1) hotels and similar establishments (in addition to hotels, they also include motels, boarding houses, guesthouses and bed and breakfast establishments, apartment and holiday villages); 2) campsites; 3) other accommodation establishments (comprising tourist farms with accommodation, private rooms, apartments and cottages, mountain lodges and chalets, workers' holiday homes and apartments, youth hostels, children's and young people's holiday homes, other accommodation establishments, temporary accommodation and marinas).

Private accommodation, part of the sharing economy and most often marketed through online platforms such as Airbnb or Vrbo, have grown significantly over the last few years, as shown by the figures noted above (23,300 tourist beds). Their expanding presence is having additional impacts on the increasing number of visitors and the unavailability of rental housing, as well as on the rising prices of accommodation for residents. In Ljubljana, compared to private accommodation, hotels and similar accommodation are very limited. As can be seen in Figure 3.12, the majority of hotel accommodation is located within the City Centre quarter, more specifically within the city centre. Private accommodation, while mostly concentrated in the city centre, is also spread out into other districts, with the highest number of the same being sited along the main traffic arteries leading into the city centre (Stubičar and Marot, 2022).

Increased tourist demands and the growing number of visitors have, in line with the development of congress and business tourism, increased the need for hotels and similar accommodation facilities. For this reason, a number of projects have been prepared in recent years (Table 3.2). Cumulatively, these have addressed the expansion of existing accommodation, such as the Lev Hotel, the Central Hotel and the Slon Hotel, as well as the construction of new hotel accommodation.



**Figure 3.12**  
The distribution of hotels and similar accommodation in 2021

**Table 3.2**  
Overview of existing development projects already in the process of elaboration of documentation and acquisition or concrete implementation (Source: MOL, 2020; ESI, 2020; Hacler, 2019; Pušnik, 2018; Matejčič, 2019; Visit Ljubljana, 2019; Jelesijević, 2015)

Project no.	Project name (source)	End of the project	Project description	Project contribution to the tourism sector
1	Centre Rog (MOL, 2020a)	2022	Urban regeneration as revitalisation of a degraded area, creation of a centre of culture and creativity and connection to the city centre, Metelkova, the new Gallery, Cukrarna and the Cukrarna Palace.	Connection between Ljubljana's city centre and other cultural, creative institutions; development of high quality open space, multifunctional space (exhibitions, education, etc.); development for residents, visitors, tourists.
2	Ljubljana Castle - Na Stolbi 8 (MOL, 2020a)	2021	Demolition of the existing building and construction of a new building to house the administrative premises of the Ljubljana Castle Public Institute and to accommodate visiting artists.	Accommodation facilities near the castle; more varied cultural and artistic offer; attracting also foreign artists; contribution to cultural tourism.
3	Family park Muste (MOL, 2020a)	2021	The park is located between Nove Fužine and Štepanjsko naselje. The park is accessible to all visitors, it is adapted for the physically handicapped, and there is a children's playground within the park. The construction of an adventure bridge over the Ljubljanica River is planned.	Attracting residents and visitors from other municipalities; green oasis in an urban area; suitable for all persons; development attracts people from the city centre to another part of Ljubljana.
4	Wooden self-contained housing unit (EU, 2020)	2020	Operational Programme for the Implementation of the European Cohesion Policy 2014-2020; The wooden modular unit is designed to meet various needs in terms of exploration, tourism and hiking. It has been used as a vertical library at the Ljubljana Castle.	A unit intended for short-term stays; for the purposes of exploration, tourism, hiking.
5	Hotel Atower (Hacler, 2019)	-	Construction of a high-end hotel in the Bavarski dvor, with around 300 rooms and conference facilities. The investor is Zlatarna Celje	New accommodation capacities, especially for tourists; possibility of using the remaining facilities and thus developing congress tourism.
6	Hotel Bellevue (Pušnik, 2018)	2021	Reconstruction of the 105-room Bellevue Hotel, at the top of Šišenski hrib.	Increasing accommodation capacity also for tourists; promoting the facility.
7	Hotel Mons (Matejčič, 2019)	-	Expansion of an existing 114-room hotel in Brdo. The expansion will add another 112 rooms	Increasing accommodation capacity also for tourists.
8	Centre Šumi (Visit Ljubljana, 2019)	-	Center will offer a 151-room hotel in addition to catering and retail activities. Center is located next to Congress square.	Accommodations for tourists; development of commercial and catering activities.
9	Neahus (Visit Ljubljana 2019)	2021	The building is under construction on Kolodvorska Street. The hotel is planned to have 49 rooms and 7 apartments.	New accommodations for tourists and residents.

### 3.6 Types of visitors

Types of tourism also dictate the types of visitors to a city. When it comes to urban tourism, knowledge of these is important for the continuous development of tourism products and the proper marketing of urban tourism destinations. To illustrate the tourist personas that are found in Ljubljana, we refer to the study Segmentation - identification of target groups of Slovenian tourism, which was carried out by the Slovenian Tourist Board (STB) and identified 12 target groups of tourists in Slovenia. The groups have been used to help promote the destination as green, boutique, active and healthy, to develop new tourism products, and have also served as a basis for the development of tourism strategies (STO, 2016b).

Tourism personas are derived from three main motives in tourism. The experiences segment, for example, has a primary motive linked to the active individual, and is therefore assigned the basic persona of the explorer who strives for a complete and active experience of the visited destination. The socialising segment has a primary motive linked to company or family. The socialiser (social butterflies) tends to experience the destination in as relaxed and sociable a manner as possible. The care for oneself segment has a primary motive linked to the individual or couple and his/her experience of the destination as a muse on both physical and mental levels. In addition to these three main groups - explorers, social butterflies, and muses - a fourth segment has emerged due to the interplay of motives, namely the mixed persona, which includes urban conscious, sociable foodies, relaxed escapists, and urban consumers.

Four tourist personas interested in visiting Ljubljana were identified. Care-free young people (youth) are mainly seasonal visitors to Ljubljana, and mostly comprised of students from abroad who are interested in the most promoted tourist attractions in addition to having fun. Their visit to the destination, which is usually only one of the destinations on their itinerary, typically lasts for a few days. Urban conscious people always visit different destinations as they strive for new experiences and adventures. They visit as many sights as possible and experience local life. Ljubljana is just one of their visited destinations. Travelling with friends is the most notable characteristic of such persons. The social foodie is a good representative of cultural tourism, as is the urban conscious persona; both partake of the cultural experiences of the destination. The urban consumer organises his/her trips in such a way as to be able to visit places and offers outside the primary destination of the visit. Ljubljana is the perfect destination for this type of person; especially given its diverse gastronomic offers. The urban consumer is similar to the urban conscious person in his or her unique visit to a destination - and the sociable foodie in his or her desire to experience the destination as wholesomely as possible, but in addition to sightseeing and experiencing local life, the urban consumer also reserves time for shopping and evening entertainment; Ljubljana offers this through its shopping malls, boutiques, local shops, and a wide range of catering services.

Ljubljana is a well-developed tourist destination, which, through the continuous development of new tourist products, meets the demands of the tourist market and the types of tourists who visit urban destinations. Cultural, business, congress, and culinary tourism are the main focus of the city, which at the same time also represent the main supporting products of the macro-destination of Central Slovenia and Ljubljana. Given this, four dominant tourist personas have been identified. On one hand, personas (carefree young people, urban conscious, social foodie, urban consumer) are more suited to cultural and gastronomic tourism as is already present, however, on the other hand, this shows potential to identify new personas more suited to develop business tourism.

### 3.7 Visitors and tourists of the destination

The main driver of the tourism sector is tourists and visitors. The accelerated development of tourism in Ljubljana and the increasing number of foreign tourists in particular dictate new tourism products and new ways of meeting the requirements of a particular profile of foreign tourists. In order to study the demands and expectations of the tourism market, surveys are regularly carried out in Slovenia and Ljubljana. The Statistical Office of the Republic of Slovenia (SURS), the database containing the largest set of statistical data in the field of tourism at the national and municipal level, conducted surveys in 2015 and 2019 (STO, 2016a; STO and Valicon, 2021), which provided insights into the trends of tourism in Slovenia. We looked at the data for Ljubljana only in order to compare the two years in more detail and to identify changes in the profile of foreign visitors. The surveys were compared with the SPOT survey below to see the similarities and differences in the results of the two surveys.

#### 3.7.1 Visitor characteristics in 2015 and 2019 (SURS survey)

The samples of tourists surveyed were somewhat different due to a change in the presentation of the data and a change to the way in which the survey was carried out. In 2015, the sample of tourists was 4,300, while for 2019, which was presented in two-month periods, the sample for each period (April-May, September-October, December-January) was 1,700 tourists. A comparison of the main seasons clearly shows that in 2015 (Figure 3.13), 55% of hotel and camping guests visited Slovenia during the main season, while in 2019 this share was only 43%. The change in the share of tourists staying in hotels, campsites, and similar accommodation for the duration of their visits was due to the development of private accommodation which are more or less advertised on online platforms such as Airbnb, Trip Advisor and Vrbo; these are not considered in the collection of data on the number of tourists choosing private accommodation.

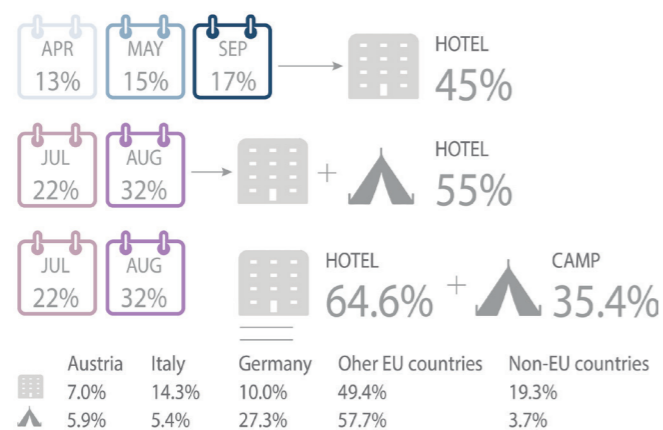
The largest share of tourists (Figure 3.14) to Slovenia in 2015 came from Italy (17%), Germany (11%), Austria (10%), England (6%). Croatia and the Netherlands had the same percentage share (5%), and a similar share of tourists came from the first three countries in 2019.



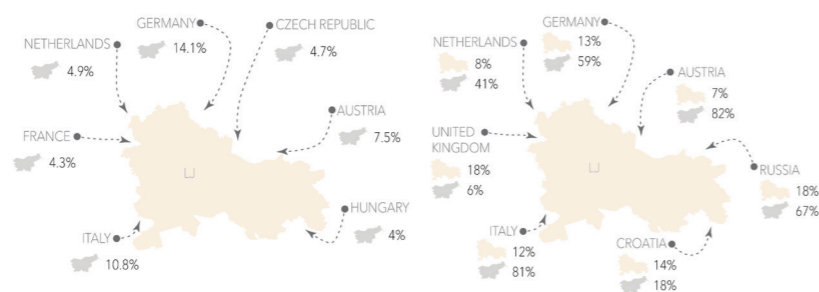
The shares in certain age groups remained almost the same. In 2019 (Figure 3.15), the 25-44 age group was more represented (44%), three percent more than in 2015; while the 45-64 age group (39%) and the over-65 age group (12%) recorded one percent less than in 2015. In both years, more men than women visited Slovenia (55% in 2015, and 53.4% in 2019).

A comparison of the basic indicators over the years shows very little change. Looking at the first three countries, the source market for foreign tourists has not changed. The same is true for the age groups represented and the proportion of men who visit. These indicators also reflect the predominant types of persons in the city. They are active visitors, and eager for cultural, historical, and gourmet experiences.

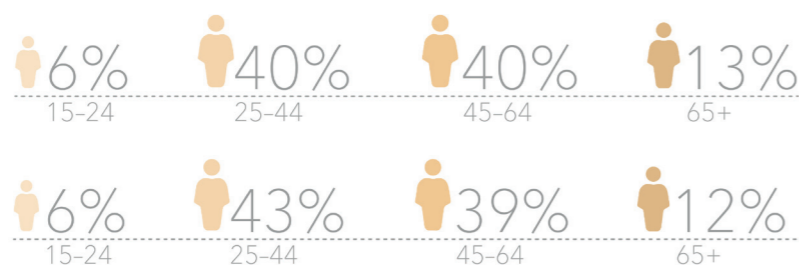
**Figure 3.13**  
Share of tourists in off season and in high season by type of accommodation, 2015 and 2019 (Source: STO, 2016a; STO and Valicon, 2021)



**Figure 3.14**  
Share of foreign tourists in Ljubljana and share of tourists with Slovenia as their only destination; left 2015 and right 2019 (Source: STO, 2016a; STO and Valicon, 2021)



**Figure 3.15**  
Age groups and share of tourists within age groups; top in 2015 and bottom in 2019 (Source: STO, 2016a; STO and Valicon, 2021)



To gain more detailed insights into the changes in the tourist profile, we compared – as detailed below – motives for arrival, travel companies, the timings of decisions to visit and the organisation of trips. To this we added the types of trips and the mode of transports used to visit the destination. The data is shown in Table 3.3.

Data	2015	2019
<b>Motive to visit - Slovenia</b>	holidays/relaxation/recreation = <b>73%</b> ; business = <b>14%</b> ; visiting relatives/culture/religion/shopping = 10 %	holidays/relaxation/recreation = 70%; business = 12%; visiting relatives/culture/religion/shopping = <b>14%</b>
<b>Motive to visit - Ljubljana</b>	personal safety = 10%; friendliness of the local people = <b>11%</b> ; cleanliness of the destination = 9%; Intact nature = 6%; quality of accommodation = 7%; gastronomy = 6%; accessibility of tourist information = 6%	personal safety = <b>11%</b> ; friendliness of the local people = 10 %; cleanliness of the destination = / %; Intact nature = <b>14%</b> ; quality of accommodation = / %; gastronomy = <b>9%</b> ; accessibility of tourist information = <b>8%</b>
<b>Travel company</b>	alone = 21%; with partner/family = 56%; with friends = <b>16%</b> ; business = 7%	alone = 21 %; with partner/family = <b>61%</b> ; with friends = 11 %; business = 7 %
<b>Type of transport</b>	car, van = 33%; airplane = <b>58%</b> ; bus = <b>4%</b> ; train = <b>3%</b>	car, van = <b>43%</b> ; airplane = 48 %; bus = 3 %; train = 2 %
<b>Food options</b>	(semi)guest house = <b>20%</b> ; restaurant = 62%; prepare themselves = <b>6%</b> ; restaurant and self-preparation = <b>12%</b>	(semi)guest house = 12 %; restaurant = <b>79%</b> ; prepare themselves = 4 %; restaurant and self-preparation = 5 %
<b>Structure of daily expenditure</b>	accommodation = 51%; food = 20%; transportation = <b>8%</b> offer = <b>8%</b> ; shopping = <b>12%</b> ; services = <b>3%</b>	accommodation = <b>57%</b> ; food = <b>22%</b> ; transportation = 6 %; offer = 6 %; shopping = 8 %; services = 1 %
<b>Time of decision</b>	less than a month = <b>32%</b> ; more than a month = 25%; more than 3 months = <b>29%</b> ; more than 6 months = 14%	less than a month = 27 %; more than a month = <b>38%</b> ; more than 3 months = 21 %; more than 6 months = 14 %
<b>Travel organisation</b>	directly at the accommodation = 24%; online reservation system = 38%; tourist agency = 4%; no booking in advance = 7%	directly at the accommodation = <b>25%</b> ; online reservation system = 48 %; tourist agency = <b>13%</b> ; no booking in advance = 7 %
<b>Use of the internet - Slovenia</b>	internet usage = 80%; obtaining information = <b>84%</b> ; accommodation reservation = 56%	internet usage = <b>92%</b> ; obtaining information = 80 %; accommodation reservation = <b>59%</b>
<b>Impression of the destination</b>	better than anticipated = 59%; within the expected limits = 41%	better than anticipated = 59 %; within the expected limits = 41 %

**Table 3.3**  
Comparison of survey results with foreign tourists in 2015 and 2019



The data on motives at the Slovenian level indicates that in 2015, compared to 2019, 3% more of tourists chose to visit the destination for holidays, relaxation and recreation, and 2% more of tourists visited Ljubljana for business purposes, while the share of tourists visiting relatives, cultural attractions or shopping was 4% higher in 2019. At the level of the tourist destination as a whole, the motives of intact nature (14%), gastronomy (9%), and the accessibility of tourist information (8%) distinguished themselves with percentage shares each being slightly higher in 2019. This data confirms the development of the city over the five-year period in the field of technology and product marketing, and the destination as being a clean, green and culinary-rich capital of Slovenia overall. In 2019, the urban tourist destination was also more attractive to tourists from all over the world. The data also illustrated a change in the perception of the importance of leisure; it is now mostly focused on relaxation and experience.

It is interesting to see data on travel companies, means of travelling, the manner of eating, and the structure of tourists' expenditure in the destination during their visits. More than half of the foreign tourists in both periods travelled with a family or partner, while just under a third (21%) travelled alone. Plane travel was the most common choice, although the share of passengers travelling by plane decreased by 10% in 2019, while travelling by car or van increased by the same proportion compared to 2015. This is not to say that the destination itself has not worked on its accessibility, as the choice of means of travel depends on factors other than promoting the (given) destination's accessibility.

The decline in air passengers can be viewed as a logical consequence of the start of Airline Adria's decline in 2019, when most routes were cancelled. This led to an increase in the use of cars or vans by foreign tourists who, in recent years have, in addition to partaking in less air travel, have followed the trend of a new lifestyle based on "full time travel", or the concept of living on the move, which allows for more flexible travel and decisions about when to visit places.

The data also confirms the development of gastronomy as a distinct tourist offering; there was a 17% increase in the share of tourists visiting restaurants in 2019. This was followed by a 22% increase in daily expenditure on food in the same year. The biggest changes to the structure of daily expenditure were in accommodation; upon which tourists spent just over half (51%) of their budget in 2015, and shopping which accounted for just 8% of their budget in 2019, rather than just over a 10<sup>th</sup> in 2015. The development of gastronomic offers is a key aspect upon which Ljubljana is building its recognition as a global visitor destination. Gastronomic offers have developed in line with this, and are mostly concentrated (and varied) in the city centre, where they are easily accessible.

In 2019, tourists decided to visit a destination more than one month in advance (38%), which is slightly more than a tenth higher than the percentage of tourists who did so in 2015. The availability of information, different online platforms, developed offers, and the increase in private accommo-

modation capacities were all factors in the decrease of the share of tourists who decided to visit a destination more than three months in advance. The proportion of such tourists fell by less than one tenth over the five-year period, as booking options have become quicker and more accessible. The same factors have also influenced changes in the way travel is organised. In 2019, the use of online booking systems (48%) and the use of a travel agencies (13%) increased by around a tenth, while the share of tourists organising their trip without pre-booking remained stable. Internet use has also increased by 12% over the period, with more tourists using it to book accommodation (59%) in 2019.

The perception of the destination remained the same; more than half of the tourists had a better impression than they expected. However, satisfaction and dissatisfaction at the Slovenian level changed. In both years, tourists were more than satisfied with personal safety (a percentage score of more than 90%), while the friendliness of the local population and the cleanliness of the destination were also considered among the more satisfactory things in 2015. In 2019, they were most satisfied with the natural environment and the opportunities to rest and relax.

### 3.7.1 Visitor characteristics in 2020 (survey in SPOT project)

The research of the SPOT project (Social and innovative Platform On cultural Tourism and its potential towards Deepening Europeanisation) was carried out in the field in August 2020 and via the online platform 1ka. The sample size was 100 respondents, representing 0.2% of all visitors to Ljubljana in August 2020 (SURS, 2021a). Most tourists came from Germany (32 persons) and almost the same number (26 persons) were domestic tourists. Just over a tenth of tourists came from France (17 people), four people came from the Netherlands and Italy, two tourists travelled from the Czech Republic and six people came from other countries such as Austria, Croatia and Hungary. The majority of tourists who stayed overnight at the destination (70 people) stayed in a hotel (23 people), with a good tenth staying in hostels (14 people) and private Airbnb accommodation (13 people). Unlike other surveys carried out in Ljubljana (Marot, 2019) and in contrast to the SURS survey (STO and Valicon, 2021), the most represented age groups were 20-30 year olds (43%) and 30-40 year olds (31%). Less than one tenth of the respondents belonged to the 40-50 year old age group (12%; significantly lower than in the SURS survey).

Architecture was the most frequent motivation for visiting the destination (51%), local traditions (48%), nature (36%) and history (33%). The motives point to changes in the types of urban tourism. They are no longer focused on traditional offers such as museums and galleries, but are moving towards a new branch of tourism, namely place-based tourism or "place-specific tourism". The most important factors for visiting Ljubljana were personal interest (85%), price (63%) and location (54%);, indicating an improved promotion of the destination, which is on the one hand a product of Tourism Ljubljana, and on the other a result of the increased use of personal online platforms (Instagram,

Facebook, and so on). The motives mentioned differ from the SURS surveys (STO, 2016a; STO and Valicon, 2021) due to the orientation of the survey. The SPOT survey focused more specifically on cultural tourism, while the SURS survey was more general. Similar differences were also evident for other indicators.

Most tourists visited the destination with a partner (36%) and almost a third of visitors (26%) visited in a self-organised group. Slightly fewer tourists (21%) came to Ljubljana with their families. Similar groups of tourists are represented when compared to the SURS survey. In the SPOT survey, the couple and family groups were separated, whereas in the SURS survey the two groups were merged, which means that there was no change in the total. If we compare the travel companies with the age groups, we can see that in summer 2020, when the Covid-19 pandemic had already developed, more young people visited the destination; most often as couple.

The results for means of transport put the use of cars and vans top of the list (53%). Compared to SURS, the use of trains (18%) and buses (14%) also increased. Less than one tenth of the respondents (6%) used air transport. The change in means of transport, with the emphasis remaining on private transport, but with an increase in train and bus usage, is attributed to the pandemic. The pandemic has restricted or prevented the use of public transport through a variety of measures; particularly evident with regard to air passenger transport.

The structure of daily expenditure in the survey included accommodation, food and beverages and other expenses. In the summer of 2020, when pandemic measures were in place which affected the availability of different services and offers, the per person per day expenditure was significantly lower compared to other surveys. Almost half (40%) spent €40 per day, while around a tenth of respondents spent less than €10 (10%), €20-40 (13%), €60-80 (10%) and €80-100 (11%).

Tourists most frequently used various online platforms (71%); more than a third followed recommendations from acquaintances (36%), and less than a third obtained information from social networks (24%). These results can be linked to the increased use of various social networks, which represent one source of tourism promotion. When asked about the recommendation of the destination, nine tenths indicated that they would be very likely (53%) or likely (35%) to recommend Ljubljana as a destination to visit.

### 3.7.2 Comparison of survey results

Comparison of the results of the survey with foreign tourists in Slovenia, (which were mostly considered at the level of Ljubljana, complemented with statistical data from SURS), showed that the motives and trends of visits changed in line with the destination, with demand, and with the development of the tourist offers available. Tourists and visitors in 2019 were visiting the destination to visit relatives and friends and were

attracted to the destination mainly by its intact nature, the well-developed gastronomic offers, and the accessibility of tourist information. The travel companies did not change during the period under analysis, as visits were still most often made with a partner or with a family who travelled to the destination by plane. Visits to restaurants were more frequent, as confirmed by the structure of daily expenditure, and visitors spent slightly more on food and accommodation in 2019. In the same year, tourists tended to decide to visit a destination just one month before the actual visit, and most booked accommodation through an online booking system to make their trip run as smoothly as possible. Accelerated digitisation has enabled closer contact and the rapid exchange of information between tourism organisations and tourists. In turn, this has led to a higher profile for the destination, and it has developed tourism products linked to culture, gastronomy and congress meetings.

This is also confirmed by the 2020 SPOT survey with tourists, which asked how satisfied tourists and visitors were with the destination's tourist offers, what interested them in the destination and what they would like to see in the city. Visitors and tourists were most satisfied with the security in the city. Other satisfactory factors mentioned included affordable prices, accessibility, quality of services, and the diversity of cultural offers available. For example, they were most impressed by historical sites and areas and by visiting restaurants (Klepej et al., 2021).

## 3.8 Structure of the urban tourism labour force

Residents are part of the city and the city is part of their identity. They use the space to provide services, to spend their leisure time within, and to build their careers. Ljubljana, as a political and administrative centre and a meeting point for all major industries and services in the country, offers diverse job opportunities. The development of tourism also creates new jobs which, in certain segments, are seasonally limited or require a certain type of workforce. This importance of tourism was also highlighted in the SPOT project survey (Klepej et al., 2021), where residents repeatedly pointed out that cultural tourism provides a variety of jobs and business opportunities. In this subsection, we present the categories of occupations and their employability and representation in tourism, as well as the changes in the number of people employed in relation to tourism development - including during the pandemic period.

### 3.8.1 Structure of the working population

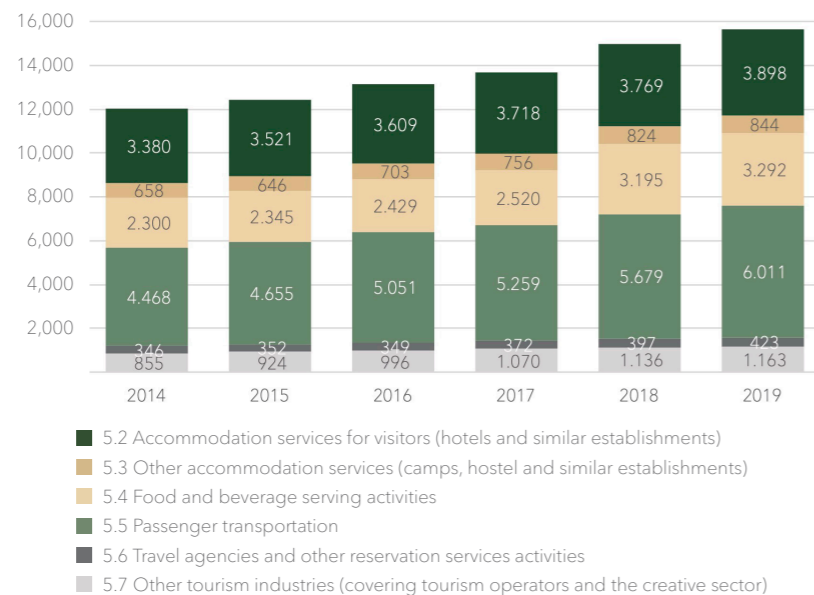
Data on the working population in the tourism sector in 2020 was obtained from the Statistical Office of the Republic of Slovenia, which defined the main categories of occupations in the Standard Classification of Occupations (CAP-08, more at: <https://www.stat.si/skp/>), namely:

- 5.2 Accommodation services for visitors (hotels and similar establishments)
- 5.3 Other accommodation services (camps, hostel and similar establishments)
- 5.4 Food and beverage serving activities
- 5.5 Passenger transportation
- 5.6 Travel agencies and other reservation services activities
- 5.7 Other tourism industries (covering tourism operators and the creative sector)

Data on the structure of the workforce (Figure 3.16) and changes by major occupational group (Figure 3.18) are shown for the period 2014-2019, while data by occupational categories is only shown for the year 2019. Due to the large dataset within occupational categories, only the data with the highest shares are shown.

A detailed overview of the structure of the workforce by year over the period 2014-2019 (Figure 3.16) clearly shows a year-on-year increase in the number of employees. Over the six-year period, there has been a 30% increase in the number of employees, with the most significant growth occurring in the food and beverage category, (individual year growth rates were as high as 8.5% and 5.8% in 2018-2019). With a few exceptions, growth in the number of employees in slightly lower proportions can be observed in all categories. For example, in the other accommodation services category, we saw a smaller decline in the number of employees in 2019, and we also saw a smaller decline in the travel agencies and other reservation services category, even in 2018. There is also a strong representation of individual categories, with food and beverage services strongly dominating, followed by the other tourism industries category which includes a variety of tourism providers as well as the creative sector.

**Figure 3.16**  
Structure of the labour force by year, 2014-2019 (Source: SURS, 2020)



The representation of the categories is quite logical given the marketing of the city's tourist offers, the number of tourists, and the spatial distribution of the offers and services in the city. Food and beverage services are the most widespread type of offer, targeting tourists and, above all, residents. This category is most widespread in the city centre, more specifically in the area of the old centre and upon the embankments of the Ljubljanica river. The high level of supply, which corresponds to the demand of the tourist market and the needs of the population, requires a corresponding increase in the number of employees. The same is true for the category of other tourism industries which covers a wide range of activities. It includes various tourism providers offering sightseeing tours, visits to galleries and museums, and tourist tours, as well as the creative sector; including various fields of art and culture. The creative sector in particular developed strongly in 2019, as can be seen in the chart, and has been more intensively involved in shaping tourism products, which - as in the previous category - requires an increase in the number of employees. In Ljubljana, this sector is strongly linked to the idea of creating a cultural quarter so that visitors are encouraged to visit other locations - beyond the overcrowded city centre - when visit Ljubljana.

A comparison of the number of employed residents at the national level over the same period confirms the development of tourism in the destination; number of people employed increased by a good tenth from 2014 to 2019 (204,202 in 2014 and 234,606 in 2019), which also brought an increase in the share of people employed in tourism industries. In 2019, the 15,631 employees in the tourism industry accounted for 6.7% of the 234,606 total employees in Ljubljana, compared with a slightly lower share in 2014 (5.9%). In terms of the representation of individual categories in 2019, the food and beverage service industry stood out with 38%, followed by other tourism activities with just under a third (25%), passenger transportation with 21%, and the visitor accommodation services category with just under a tenth (7%). This was followed by travel agencies and other reservation services with 5% and other accommodation services with the smallest share of 3% (SURS, 2020).

The accommodation services for visitors category (5.2), which includes hotels and similar establishments, employed total of 1,163 workers, of whom hotel receptionists (26%) and cleaners, servers and helpers in offices, hotels and other accommodation (26%) account for the majority of the total. The other accommodation services category (5.3) employed 1,163 workers (5.3), which includes campsites, hostels and similar establishments, had a total of 423 employees, which is the smallest share of all employees in the tourism sector in Ljubljana (3%). Cleaners, servers and helpers in offices, hotels and other accommodations (28%) and cooks (27%) dominate with less than a third of them. The small share is in line with the limited offer of campsites and similar accommodation. Ljubljana is an urban destination which, on the one hand, keeps its offer very much in the city centre and, on the other hand, still limits

the expansion of its offers to urban activities and urban areas. Campsites are therefore often not part of the tourist offer; they do not represent an activity that a visitor to an urban destination would undertake.

The category of food and beverage service activities (5.4), which dominated the total of all employees in tourism in Ljubljana with a share of 38%, employed a total of 6,001 persons, which also represents 2.5% of all persons employed in Ljubljana (not only in the tourism sector). The category is dominated by waiters (49%) and cooks (30%), with almost half of waiters (49%) and a third of cooks (30%), which is consistent with the prevalence of the catering sector in the city of Ljubljana (5.3). Pubs, bars, cafés and restaurants are mostly present in the city centre, while fast food places are dispersed around the city centre. The number of gastronomy establishments is by far the highest when placed alongside the number of other services and facilities. At the same time, these services require a large number of employees due to the nature of the work (two-shifts or weekend work) and the number of people who partake of these services.

The total number of employees in the category Passenger transportation (5.5) was as follows: 3,292 persons, with bus drivers (84%) and only 5% of cashiers and ticket sellers, the highest proportion of whom did not appear in any category. This high share of a particular occupation is attributed to the assumption that most transport companies have their headquarters in Ljubljana, where the structure of public transport is highly developed; it is used by both residents and visitors.

The category of employees in travel agencies and other reservation services (5.6) is the second least represented, but unlike category 5.3, it has only half as many employees, i.e. 844 employees. The most prominent occupations are tourist products development and sales professionals (30%) and, with less than a third, travel agency managers (23%). Overall, the number of travel agencies in Ljubljana is still rather low (but higher than in other cities), which is probably due to the low demand for this service among Slovenians and the digitisation of the sector in recent years.

The last category (5.7) of employees in other tourism industries also includes other tourism providers and the creative sector; it had 3,898 employees in 2019. This category is dominated by occupation groups not mentioned in any of the other categories, namely sports, recreation, and cultural centre managers (17%), and artistic, cultural and culinary associate professionals (16%). Graphic and multimedia designers and assistants in galleries, museums and libraries are also represented and accounted for less than a tenth of the total number of employees within this sector.

The two categories with the most employees were food and beverage service activities and other tourism industries. The chart above confirms the presentation and description of each category and clearly shows

which occupations dominate. The first category includes occupations engaged in catering, while the second category includes occupations primarily engaged in developing activities in the other tourism industries category. Both categories are the result of the targeted marketing of the tourist offers in Ljubljana, which emphasis the predominance of the cultural offer whilst also – through advertising and recommendations on catering services – further reinforce the growing presence and importance of gastronomy. This sector has adapted to the demand on the tourist market, while at the same time stimulating the demand for more employees.

The working population also includes students. Data on student work is excluded from the SURS database due to the nature of the work as it is not linked to employment contracts such as those for permanent or temporary workers. Nevertheless, this area is still addressed, but to a lesser extent than other aspects, in this chapter. Student work includes seasonal work, which, according to the categories listed, could be mainly ascribed to the food and beverage service, hotel accommodation or other tourism industries. The demand for staff for catering, reception or promotional work is very high, especially in the high tourist season. Most students work in the summer – on the one hand because of their own availability (end of semester and study commitments), and on the other because of the increase in tourist arrivals and the consequent demand for temporary labour at short notice. Data on hourly rates of pay, the number of hours worked, and the available working months in tourism for the period between 1 September 2018 and 30 September 2019 were obtained from one student service that covers the majority of student work placements in Ljubljana. In total, there were 616.4 jobs in the 'tourism and catering' service, and 1,700 hours are required for one job. Students worked an average of 326 hours over the 13 months, with a total of 3,211 students working in student jobs. In 2019, there were 2,333 advertisements for student work, and in 2020, there were half as many (1,277), due to the beginning of the Covid-19 pandemic, which severely disrupted opportunities for student work. The declared epidemic and the closure of activities caused students to lose their jobs and made them subject to an unstable and precarious financial situation. Given such factors, demand for student work was significantly lower, which explains why number of the job advertisements published in 2020 was half that of 2019.

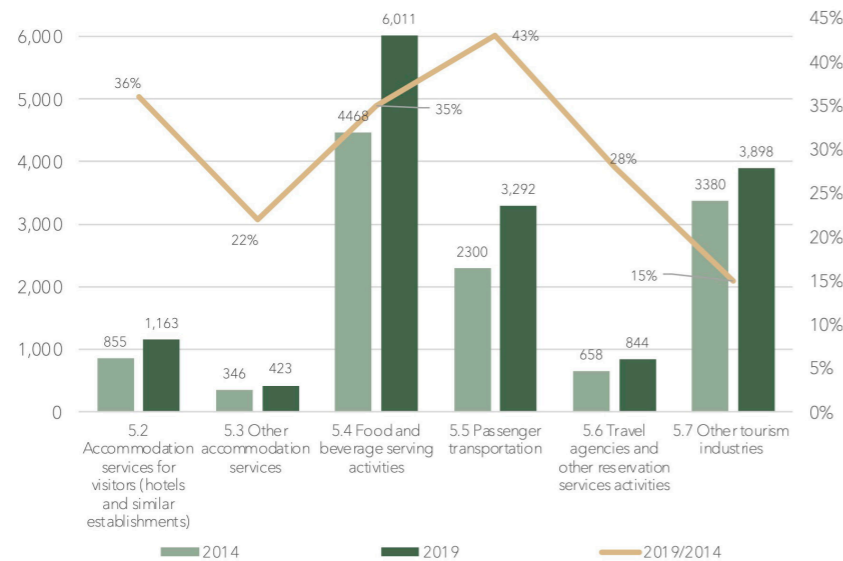
### 3.8.2 Comparison of employment between 2014 and 2019

Analysis of changes in employment over the period 2014-2019 (Figure 3.17) shows an overall increase in employment of just under a quarter; 23%. Tourism experienced the strongest growth over this period, as shown by almost half the growth (43%) in the passenger transport category, 36% growth in the hotel category, and 35% growth in the food and beverage service category. The smallest growth was recorded in the other tourism industries category (15%). If we relate the changes over the period to the occupations within the individual categories which recorded growth of more than 50%, we see that in these cate-



gories (5.3, 5.4, 5.6) the occupations Marketing and Sales Managers stands out. Other occupations that have experienced similar growth are mainly sales, advertising, marketing and tourism product development professionals, and freelancers in galleries and museums. These occupational groups indicate a more supported development and promotion of cultural tourism, which takes place at the level of cultural attractions or institutions.

**Figure 3.17**  
Changes in employees 2014-2019 by main occupational groups (Source: SURS, 2020)

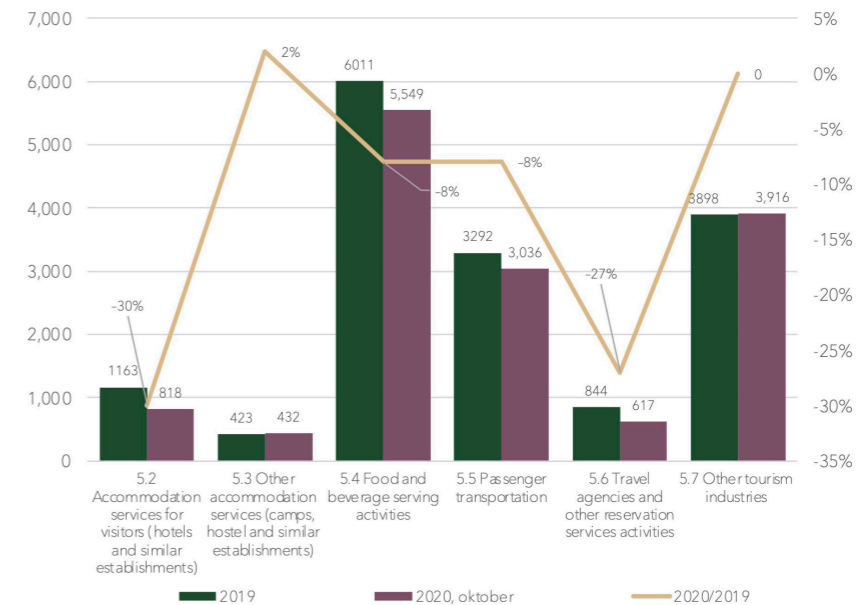


**3.8.3 Employment before and during Covid-19 pandemic**

Figure 3.17 shows the changes in the categories examined, and a clear and evident growth in line with the development of tourism. Figure 3.18 shows a period that was strongly marked in the beginning by the Covid-19 phenomenon. The data is shown for the period 2019-2020 and shows mainly negative figures, with the exception of the category of other accommodation services, which had growth of 2%, and other tourism industries, which did not see any change. On the other hand, the biggest declines were seen in the hotel category (-30%) and in travel agencies (-27%) - both were hit hard by the pandemic. As in the case of cultural institutions, where we refer mainly to galleries and museums, the outbreak of the epidemic, the changes in measures, and the closure of the country triggered a wave of events that made it impossible for the two main areas of tourism to function normally. The closure of the country prevented the entry of foreign tourists, and the closure of municipalities prevented the movement of citizens. The sharp decline in the number of tourists paralysed many accommodation establishments which, as a result, laid off employees or ceased operating altogether. Associated travel agencies, which often work in partnership with hotels, followed a similar path.

Service providers implemented various measures to mitigate against the impacts of the Covid-19 pandemic. The SPOT survey (2021) conducted with accommodation, hospitality and attractions providers

highlighted measures such as maintaining relationships with existing and new customers, upgrading existing digital services, and developing new products and digital services. At the same time, they were forced to change the ways in which they worked, with the most common measures being reduced hours and pay, reassignment, and redundancies.



**Figure 3.18**  
Comparison of the number of employees between 2019 and 2020 (Source: SURS, 2020)

The overview and the dataset demonstrate that tourism is an important economic sector that provides a variety of work opportunities for Ljubljana's residents, including students. The growth of tourism in the last five years before the pandemic successfully recruited a workforce that declined sharply with the advent of Covid-19. This is a cooperative cycle, whereby the growth in tourism increases the demand for labour, and an increasing number of workers who can do efficient and fast work, i.e. keep up with the needs of the market, attract and increase the number of tourists.

**3.9 Conclusion**

Tourism was present in Ljubljana from the very beginning of the city's formation. If the first form of tourism was pilgrimage, "modern pilgrimage" has been upgraded with various contents, which are based on physical space and the attractiveness of the city as a living environment. The establishment of the Ljubljana Tourism Public Institution at the beginning of the new millennium, in parallel with global developments, laid the foundations for the accelerated development of tourism in Ljubljana, which, especially in recent years, has developed to the point of destination recognition at an international level. The creation of new products and the first information points attracted mainly domestic visitors in the early years, but in the last decade, with the support of strong

digitisation, technological development, infrastructure upgrades and the development of new tourism products, they have been far out-paced by foreign tourists and visitors.

The tourist offers available in the city have certainly been successfully in adapting to the demand and requirements of the tourist market. In addition to the constant search for opportunities to develop new products, development is also focused on improvements to the infrastructure of the city – such as building new hotels, and creating new attractions and products. The improvement of open spaces, which puts the pedestrian at the forefront, and the upgrading of gastronomy services do not only serve tourists, but are also aimed at residents. With the emergence of almost overtourism, there was a growing awareness that the historic centre had a limited capacity to accommodate such a large number of visitors. This led Ljubljana Tourism to start developing a cultural quarter tourism product that would take tourists to other parts of Ljubljana, not only relieving the pressure on the city centre, but also providing an opportunity for alternative providers of tourism offerings to develop.

The results of the surveys, which show that tourists are very satisfied with the safety of the city and with the tourist offers, (mainly linked to cultural tourism), confirm the established image of Ljubljana as an urban destination. Cultural tourism is one of the main products of the Central Slovenia and Ljubljana macro destination, with gastronomic and business tourism being other important products. All of these have put Ljubljana on the international map, even though it is not a competitive destination in the case of business tourism. Business tourism has great potential in Ljubljana, but there is a need to constantly upgrade accommodation capacity. Mindful of this, projects have been or will be undertaken to build or renovate hotel (and similar) accommodation. In general, the city is interesting to tourists from an architectural point of view and with regards to the interplay of different historical periods. In addition to the small size of the town, they appreciate the integration of green spaces into the tourist offer and the city itself, which, in addition to being a well-developed gastronomy destination which offers a mix of tastes, and suits different visitor profiles. In Ljubljana, in addition to the urban conscious the carefree youth, the urban consumer and the sociable foodie, the four types of persons identified, they want above all business visitors to visit the destination. The awareness of the main stakeholders in the tourism industry of the importance of the destination dictates the formulation of strategies for the development, expansion and management of tourism, including creating and expanding new jobs and business opportunities.

In conclusion, Ljubljana has become a developed and recognised city destination. While its size is not comparable to the world's capitals, it has already taken its place on the world's tourist map with well-developed tourist offers and promotion. Like other similar European cities, it is successfully following global trends, while at the same time trying

to preserve its identity and authenticity. With tourist products that respect this, it builds on the remnants of its cultural, architectural and gastronomic history; a process that has been reinforced by its gaining UNESCO and European titles. At the same time, it is improving the city's infrastructure and continually seeks new opportunities to raise its profile in the wider global tourist sector.

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## Chapter 4

### Urban destination Maribor

Uroš Horvat





### 4.1 Introduction

Maribor is an important economic, cultural and educational centre of north eastern Slovenia, and the second largest city in the country. It lies on the banks of the Drava River, where five different regional units meet: the Drava Valley with its great transport and energy importance, the Pohorje Mountain, formerly mostly known for its extensive forests but today mainly known for its developed summer and winter tourism, the borderline Kozjak Hills, the fertile Drava Plain with its extensive cultivated areas, and the Slovenske Gorice hills with its developed fruit and viticulture. 97,019 inhabitants live in the city of Maribor within an area of 41 km<sup>2</sup> (at the beginning of 2021). The city covers the central part of the municipality of Maribor, in which 113,778 inhabitants lived within an area of 147.5 km<sup>2</sup> (at the beginning of 2021) (SURS, 2022a).

The city began to develop along the Drava River in the 12<sup>th</sup> century. The fortress or castle on the hill above the settlement was called "Burg in der Mark" and was first mentioned in a document from 1164 as "castrum Marchburch" (Mlinarič, 2000; Ravnikar, 2020). The Slovenian name Maribor was first written down in 1836 by Stanko Vraz. Between the 16<sup>th</sup> and 18<sup>th</sup> centuries, it was a small craft and trading settlement. The development of it was affected by numerous economic crises, fires, Turkish sieges, "wine wars" with the neighbouring city of Ptuj, and plague epidemics. Due to relatively slow growth, only around 2,200 inhabitants lived in the town at the beginning of the 19<sup>th</sup> century. After the construction of a railway line between Vienna and Trieste in the middle of the 19<sup>th</sup> century, trade and industry began to develop, and this gave rise to the rapid growth of the settlement. After the First and Second World Wars, the city's economy advanced greatly, and Maribor became one of the most industrialized centres of Slovenia.

In 1981, around 106,000 people lived in the city; the highest number in its history. When the common Yugoslav market fell apart in the late 1980s and early 1990s, Maribor's industry, which was mostly dependent on it, fell into a major crisis. All major industrial companies were closed, including those metal and textile sector companies which had previously employed almost 40% of the population. This, in addition to the process of suburbanization and the aging of the population, affected the city's demographic development and the number of inhabitants in the city decreased to around 94,000 in 2002 (Horvat, 2019a).

At the end of the 1990s, with the development of small and medium-sized enterprises, the economic situation began to improve again. The leading role in development was taken by the service sector and the financial sector. Based on the number of employees, the University Clinical Centre and the University of Maribor are among the largest employers in the city. Tourism is also an important economic sector

which attracts an increasing number of tourists to the city due to its rich history, numerous businesses, cultural, entertainment, sports and ethnological events. In addition to the city centre, tourists are also attracted by the city's diverse surroundings, which present great potential for the development of tourism in the wider region.

Tourist development in Maribor began after the construction of the Southern Railway between Vienna and Trieste and accelerated at the end of the 19<sup>th</sup> century. In 1909, around 15,600 overnight stays were recorded. Tourists stayed in smaller city hotels and guesthouses. Between the two world wars, some new accommodation facilities were built, and tourist visits also increased. In 1935, around 56,300 overnight stays were recorded (Janša Zorn, 1996).

After the Second World War, Maribor experienced intensive industrial and spatial development. This was followed by the development of tourism in the 1960s. The number of tourists has increased significantly, and the data shows that before 1990, Maribor regularly ranked among the top ten tourist places in Slovenia with regards to the number of overnight stays. Apart from Ljubljana, it was the only place within the list to have developed urban tourism. A large part of its tourism was comprised of business tourism with tourists, most of which came from other republics of the former Yugoslavia. The peak of visits (with 235,000 overnight stays) was recorded in the late 1970s and the late 1980s. After 1990, however, due to the war in the territories of the other republics of the former Yugoslavia and the collapse of large Maribor companies, tourist visits decreased sharply (by a factor of more than 5) and in 1995 only around 40,000 overnight stays were recorded (Horvat, 2012a).

With the entry of Slovenia into the European Union in 2004, the re-establishment of transit flows towards South-Eastern Europe, the restructuring of the economy, and the expansion of tourist infrastructure as well as offerings, tourism once again became an important economic activity in the city. The period between 2015 and 2019 represents the period that has witnessed the city's fastest growth in tourist visits. Numbers reached a peak in 2018 with around 466,000 overnight stays and in 2019 with around 218,000 tourists (Horvat, 2021).

The city is located only 18 km from the state border with Austria at the junction of the 5<sup>th</sup> and 10<sup>th</sup> pan-European transport corridors. This enables it to have good transport connections with the regions of Central Europe. It is also an important entry point on the way to the Balkans and South-Eastern Europe. It has good road and rail connections with Ljubljana, Graz, and Zagreb. In 1976, an airport was built nearby, which was renamed Edvard Rusjan Maribor Airport in 2008. The airport is suitable for international commercial air traffic, but unfortunately, it has not had any scheduled airlines for many years; representing a huge unused potential.

In 2000, the municipality of Maribor established the Public Economic Institute for Tourism Maribor which, in 2012, was renamed to the Maribor – Pohorje Tourist Board and in September 2020 to the Maribor Tourist Board (VisitMaribor, 2021a). The institution acts as a central tourist organization for the implementation of public services, promoting tourism, creating and promoting a comprehensive tourist offer in the region, promoting the development of tourist infrastructure and informing visitors.

### 4.2 Tourist infrastructure and number of beds

The construction of modern tourist infrastructure began in the 1960s. At the time, tourist offers were dominated by three city hotels and two further hotels which were located below and on top of Pohorje Mountain. In 1963, the city's largest hotel, Slavija was built – this was closed in 2001 and then converted into a business centre in 2012. In 1966, the Turist Hotel was expanded, and subsequently converted into the Piramida Business Hotel in 1995. It was subsequently renovated again between 2010 and 2012. In 1969, the city's oldest Hotel Orel (from 1928) was modernized and in 1989 connected to the former hotel Zamorc. In 2006, part of the hotel was closed and converted into a shopping centre, a second part was renovated, and third part was turned into a Uni youth hostel. Outside the city centre one may find the Habakuk Hotel which was converted into a 5-star hotel in 1998, and above it, next to the upper station of the Pohorska Vzpenjača cable car, is the Bellevue Hotel, which was renovated in 2007. The named hotels were owned by the largest hotel company in Maribor, Terme Maribor, until 2011, after which they fell into the ownership of foreign investors (from the Russian Federation, and in 2019, companies in Cyprus) (Večer, 2020).

**Table 4.1**  
Number of all tourist beds in Maribor between 1966 and 2021 (Source: Results of Surveys; SURS, 2022b, c)

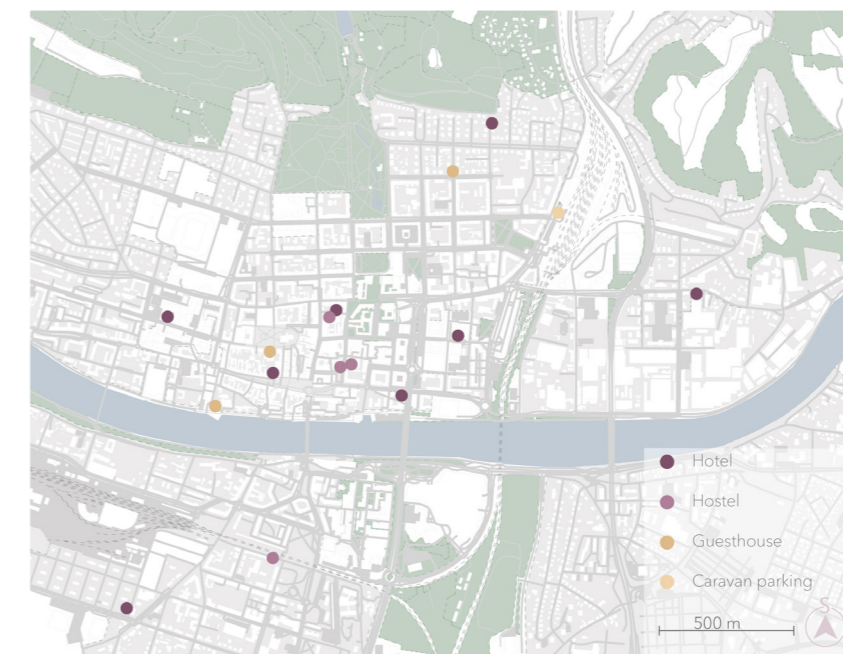
Year	1966	1971	1981	1991	2001	2006	2011	2017	2019	2021
Type of accommodations	city	city	city	city	municipality (m)	m	m	m	m	m
Hotels and similar accommodations	551	643	898	870	736	882	2,027	2,128	-	-
Other accommodations	180	474	31	58	70	135	1,518	2,099	-	-
<b>Total</b>	<b>731</b>	<b>1,117</b>	<b>929</b>	<b>928</b>	<b>806</b>	<b>1,017</b>	<b>3,545</b>	<b>4,227</b>	<b>6,160</b>	<b>4,897</b>

Note: The data for the period between 1966 and 1991 refer to the city of Maribor, between 2001 and 2021 to the Municipality of Maribor. The data for the period between 2001 and 2017 are collected according to the old methodology, for the period between 2019 and 2021 according to the new methodology of SURS (M2018).

From the beginning of the 1970s to the end of the 1980s, the number of tourist beds in Maribor decreased, but the number available in hotels and similar accommodations increased by more than half (Table 4.1). This was the period in which the city experiences its first peak of tourist visits, and it coincided with the city's peak of economic development. Between 820 and 930 beds were available in hotels during this period; 70-80% of all tourist beds. During the crisis period in the mid-1990s, the number of all beds fluctuated greatly and, in some years, decreased to around 800, whilst the number of hotel beds available fell to around 500.

After the year 2000, there was an intensive restructuring of tourist infrastructure, modernization and expansion. As a result, new hotel and other facilities (e.g., hotels Arena, Bajt, Bau, Draš, Milena, Tabor, Terano, Maribor, Maribor Inn, and so on) were built. Most of the new accommodation facilities are located on the outskirts of the city, and especially at the foot of the Pohorje Mountain where, in addition to the Habakuk Hotel and the Arena Sports Hotel, there are several smaller family hotels, lodgings, and guesthouses. The construction of new accommodation intensified further after 2006, when new hotels were built on the outskirts of the city and in the city centre as well (among them the Betnava Hotel in 2007, and the City Hotel in 2011) (Horvat, 2012b).

The number of beds in hotels and similar accommodation increased from around 740 in 2001 to over 1,000 in 2007, and to over 2,000 in 2011, while the number of all tourist beds increased from around 1,000 in 2003 to over 2,000 in 2008, and to over 4,000 in 2011. In 2017, there were around 4,200 beds available, of which around half were in hotels and similar accommodation. The decrease of the share of tourist beds in hotels is especially important from the point of view of expanding the variety of the tourist offer and the availability of differently priced accommodation facilities.



**Figure 4.1**  
Distribution of hotels and similar accommodation in the centre of Maribor (Source: Report on spatial analysis of urban tourism, 2021)

Based on the new data collection and processing methodology (SURS, 2021), The Statistical Office of the Republic of Slovenia detected 6,160 beds in Maribor in 2019 (of which 5,628 are permanent) (Table 4.1). The Maribor Tourist Board stated in its annual report that according to the data of the "taksa.si" program, 6,446 permanent tourist beds were available in 214 facilities in the municipality in the same year. Of all available beds, 29% were in hotel and motel accommodation, 36% in

apartments, lodging houses, tourist farms and guesthouses, and 35% in student dormitories and youth hostels (ZTMP, 2019, 2020a). Among individual types of accommodation, Maribor is noticeably lacking in camping facilities - there are only a few in the vicinity of the city. Based on the above, we can conclude that the total number of tourist beds has increased significantly in recent years, with the increase mainly due to beds in student dormitories and smaller accommodation facilities, (especially in private rooms and apartments that are rented out through various online providers, including providers based on the principle of the sharing economy such as Airbnb).

In contrast to Ljubljana, where in 2019 there were more than 1,600 units available from private providers via the sharing economy, there were only about 180 in Maribor. Their number decreased to about 150 units in 2020, and according to the latest data the figure now stands at less than 130 (AirDNA, 2020). It is expected that due to Covid-19 pandemic, the number of accommodation units will decrease further. Among available housing units, around 75% were in detached apartments or residential buildings, and 25% of the units were rooms within apartments (AirDNA, 2020).

The first consequences of the crisis and the decrease in tourist visits were the cessation of operation of some facilities, e.g., the bankruptcy of the Hotel Betnava (STA, 2021), the closure of the Habakuk hotel and the announcement of the sale of the city hotels owned by Terme Maribor company (MariborInfo, 2020a; RTVSLO, 2020a). According to SURS data (SURS, 2022c), in 2020 the number of tourist beds decreased to 5,297 beds (of which 4,989 permanent beds), which represents a decrease of 14%. In 2021, there was a further reduction to 4,897 beds (of which 4,650 are permanent), i.e., 7.6%.

### 4.3 Scope and characteristics of the tourist visit

We analysed the data collected by the Statistical Office of the Republic of Slovenia (SURS) on stationary tourists and their overnight stays. When using the data, it should be noted that the time series has been interrupted twice (SURS, 2021a). The first break in the time series was due to a change in the statistical survey methodology in 2008 which introduced a different way of preparing the framework of observed units and inserting data for units that did not report data on time. A new way of publishing data was also introduced. Before that, data was published by settlements and municipalities (the latter from 1994 onwards), but with the new approach from 2009 onwards, only by municipalities. The research methodology was changed for a second time in 2018, when it adapted new European regulations in the field of tourism statistics. As a result, data before and after that (2009) change in methodology are not completely comparable. With the new methodology (referred to below as M2018), the way of preparing the framework of observed units was changed again and introduced complete data coverage (including providers of tourist services

via the sharing economy, such as Airbnb), and the data is collected from administrative sources. According to the new methodology (M2018), some annual data was recalculated for the period 2010–2017 and this is available in the SiStat database.

Due to the mentioned changes in the methodology, in this analysis, the data showing a longer period refer to different areas which actually overlap in some time period. For the period between 1960 and 2009, the set of data shown refers to the city of Maribor, and in parallel, a set of data is also shown for the period between 1992 and 2009 that refers to the Municipality of Maribor. It is noticeable that the data between the settlement and the municipality of Maribor do not differ significantly; almost all tourist visits registered in the municipality represent a visit to the city of Maribor. A parallel set of data is also shown for the period between 2010 and 2017; in this period the data is shown according to both methodologies and then continues until 2021 according to the new methodology (M2018).

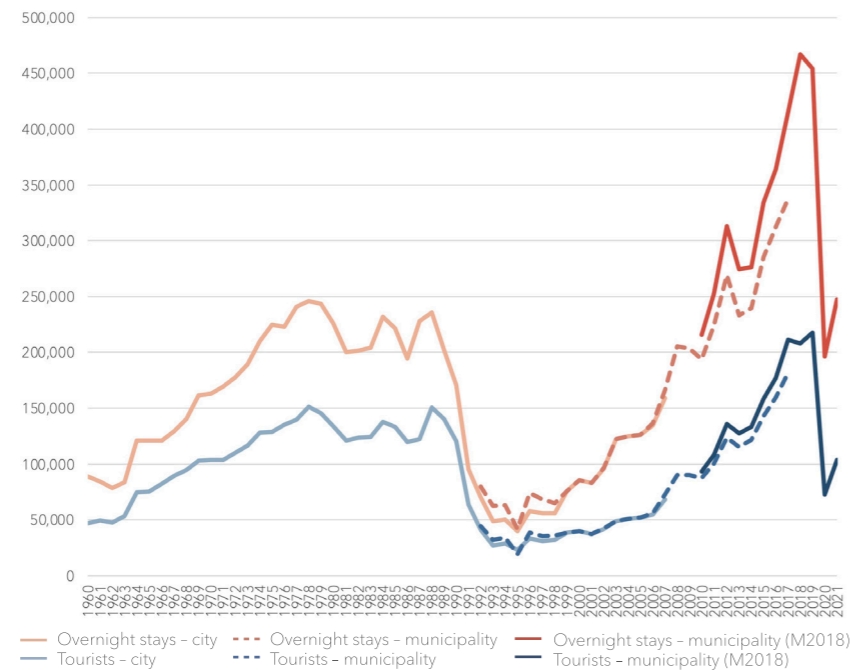
#### 4.3.1 Number of tourists and overnight stays

Based on the volume and characteristics of stationary tourist visits in Maribor in the period between 1961 and 2021, the overall period can be divided into several development periods. The period from the beginning of the 1970s to the end of the 1980s was a period of gradual tourism development which led to the city's first peak in tourist arrivals. It coincided with the city's peak of general economic development. The number of tourists varied between 120,000 and 150,000, and the number of overnight stays varied between 200,000 and 245,000 annually (Figure 4.2). Based on the mentioned volume of tourist visits, Maribor was an important tourist destination in Slovenia at that time and was included in the list of the ten most important Slovenian tourist destinations by number of overnight stays (Horvat, 2012a).

The period between the end of the 1980s and the end of the 1990s was marked by the biggest crisis in tourism since the Second World War. The period coincided with the rapid collapse of large industrial companies in Maribor, the war in the area of the former Yugoslavia, and consequently a noticeable change (and decrease) in transit flows towards Southeastern Europe. In the first half of the 1990s, the number of tourists dropped to less than 30,000, and the number of overnight stays fell to fewer than 60,000.

With the stabilization of the political situation in the Balkans, the entry of Slovenia into the European Union (in 2004), the adoption of the Euro as the common European currency (in 2007) and the modernization, restructuring and development of new tourist infrastructure (Horvat, 2012b), the start of the new millennium witnessed a period of renewed tourism development. In contrast to Ljubljana, tourist visits in Maribor increased more slowly and were still significantly behind compared to the previous period. The number of overnight stays in Maribor reached the level of the mid-1960s only in 2003, and its peak from 1978 was exceeded only in 2012 (Figure 4.2).

**Figure 4.2**  
Number of tourists and overnight stays in Maribor between 1960 and 2021 (Source: Results of Surveys; SURS, 2022d, e, f)



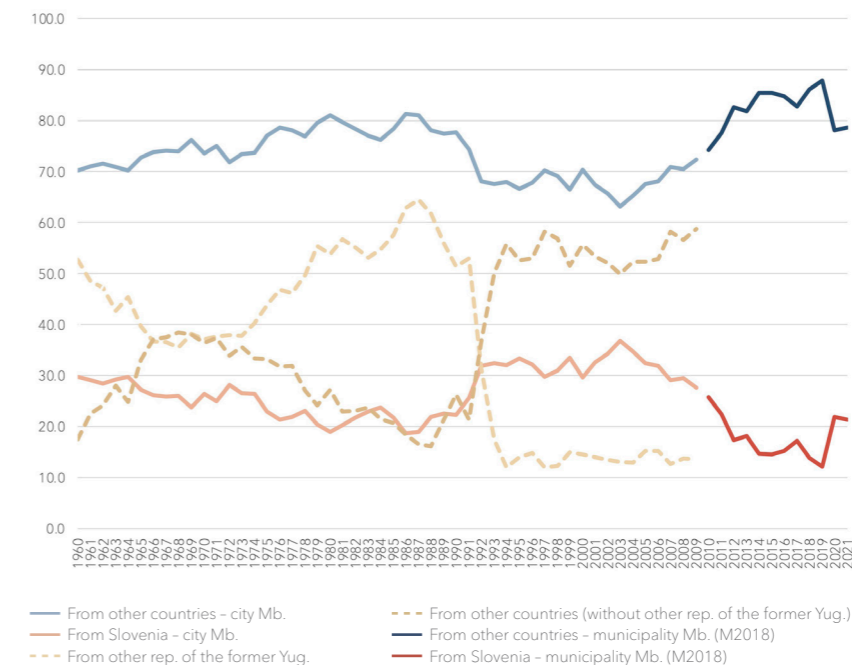
If we compare the increase in tourist visits in Slovenia, Ljubljana, and Maribor between 2010 and 2019 based on the new SURS methodology from 2018 (M2018), we find that during this period the number of tourists in Slovenia increased by 89%, in Ljubljana by 162%, and in Maribor by 126%. In the same period, the number of overnight stays in Slovenia increased by 60%, in Ljubljana by as much as 165%, and in Maribor by 110%. In contrast to Ljubljana, accommodation capacity in Maribor did not increase as much, and the airport also failed to introduce any regular flights. Nevertheless, the period between 2015 and 2019 is the period that has witnessed the fastest growth in tourist visits to Maribor; in 2019 the number of tourists exceeded 217,000, and the number of overnight stays was 466,000.

Tourist stakeholders predicted further growth in tourist arrivals in 2020 as well, but growth slowed down in the second half of 2019 and was then completely paralysed in 2020 as a consequence of the Covid-19 pandemic. Tourist arrivals fell to the level of recorded in the 1970s, and in 2020 reached only 33% of the number recorded for 2019. With around 72,000 in 2020 was lower than before 1964 and also lower than in the period between 1991 and 2007. There was a smaller decrease in the number of overnight stays, which in 2020 reached 43% of the number recorded 2019. With around 196,000 in 2020 was lower than before 1974 and also lower than in the period between 1990 and 2007. The data for 2021 however showed growth again; compared to the figures recorded for 2020, those for 2021 exhibited an increase of about 43% in the number of tourists, while the number of overnight stays rose by around 26%. 103,000 tourists in 2021 represent only around 47% of tourists from 2019, and 247,000 overnight stays in 2021 represents only around 54% of overnight stays from 2019.

**4.3.2 Domestic and foreign tourists**

In the 1980s, most tourists in Maribor came from other republics of the former Yugoslavia. The share of their overnight stays ranged from 53-64%, and among them the most represented tourists were from Serbia (they accounted for around 27% of all overnight stays) (Figure 4.3). Tourists from other countries accounted for only about a third of overnight stays (Horvat, 2012a). Business and transit tourists dominated among tourists from Serbia and Bosnia and Herzegovina; evidenced by the relatively short average length of tourist stays in the city. In the 1990s, the share of overnight stays by foreign tourists gradually began to increase, with tourists from nearby Central European countries dominating. The share of their overnight stays gradually increased to 62%. If we add to this the overnight stays of tourists from other republics of the former Yugoslavia (defined as foreign tourists after 1991), the share of foreign tourists increased from 65% to 78%.

After 2000, tourist visits to Maribor increased mainly as a consequence of an increase in the number of visits by foreign tourists; the share of overnight stays by domestic tourists slowly decreased from 25% to around 15%, and stabilized at less than 15% by 2019 (Figure 4.3). The share of overnight stays by tourists from other countries that originated in the area of the former Yugoslavia also stagnated (around 13%). Both shares are still, however, much higher in Maribor than in Ljubljana, where tourists from Slovenia register less than 5% of overnight stays (Horvat, 2019b). In 2011, Maribor was visited by around 77,000 foreign tourists, who spent, in total, around 165,000 nights in the city. Most of these visits were from countries that already dominated the international market of tourists in the city; Germany (9.1%), Croatia (7.1%), Italy (7.0%), Austria (5.3%) and Serbia (5.1%).



**Figure 4.3**  
Share of overnight stays by domestic and foreign tourists in Maribor between 1960-2021 (Source: Results of Surveys; SURS, 2022d, e, f)

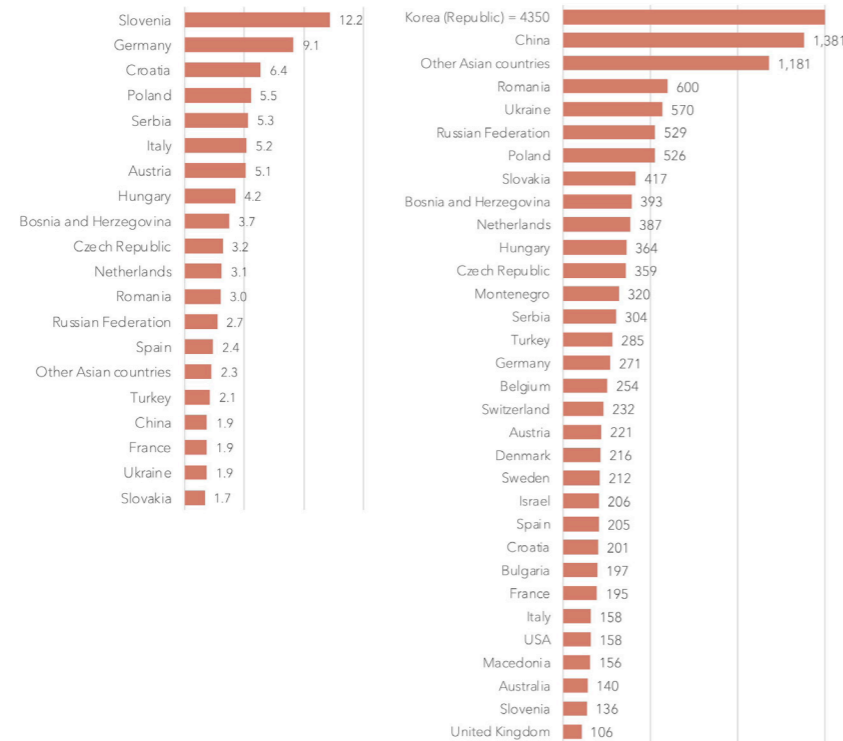
Note: Tourists from other republics of the former Yugoslavia are shown in the category "From other countries" throughout the period, and separately (dashed line) in the period between 1960 and 2009.



In 2019, the share of overnight stays by tourists from other countries reached approximately 87%. The most represented tourists for overnight stays were from Germany (9.1%) and Croatia (6.4%), followed by Poland (5.5%), Serbia (5.3%), Italy (5.2%) and Austria (5.1%) (Figure 4.4). These percentage shares show that the gravitational area from which tourists come is still mainly Central and Eastern Europe, as well as Western Europe, only tourists from the Netherlands and Spain contributed more than 2% of overnight stays.

In the years immediately before the Covid-19 pandemic, visits from non-European countries also increased significantly. Before 1991, tourists from this area contributed less than 4,000 overnight stays in Maribor annually, (about 3% of the total). After 2000, their share increased to over 5%, and in 2019, there were around 17,000 tourists from non-European countries who, cumulatively, accounted for just under 42,000 overnight stays, or 9.2% of the total. In 2019, the most tourists came from Korea (around 4,000), China (3,100), from other Asian countries (3,300), and from the USA (2,500), but the shares of their overnight stays were lower due to the shorter average lengths of their stays. Despite the growth, the number of tourists who came from other continents was significantly lower in Maribor (at least 10 to 20 times lower) compared to those who visited Ljubljana in the same period.

**Figure 4.4**  
Share of overnight stays by tourists from 20 countries with the highest share of overnight stays in Maribor in 2019 (left) (Source: SURS, 2022e, f)

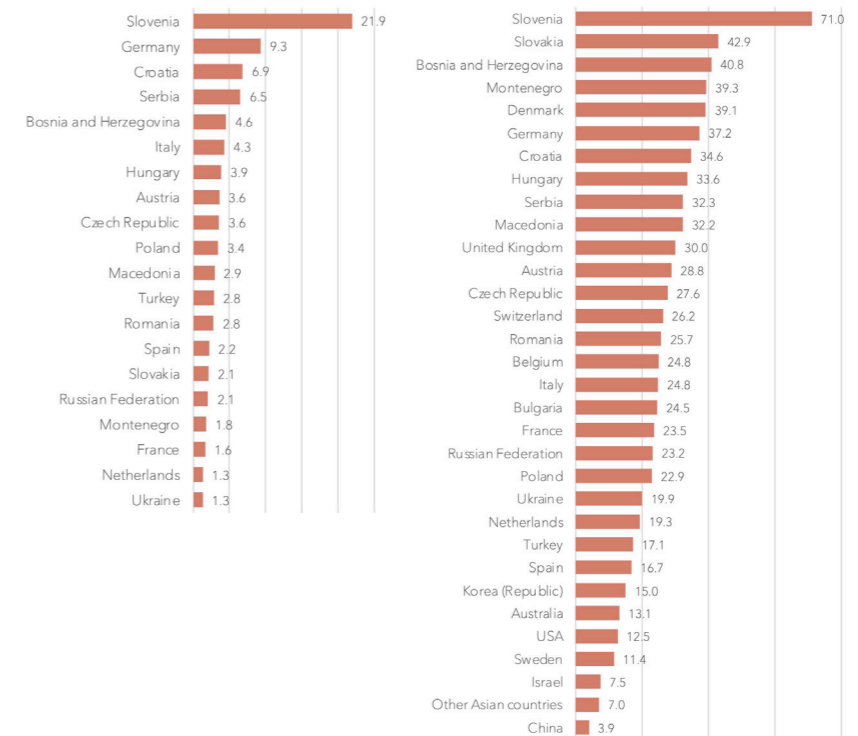


**Figure 4.5**  
Index of changes in the number of tourists in Maribor by selected countries of arrival between 2008 and 2019 (right) (Source: SURS, 2022e, f)

Despite the significantly smaller volume of visits that Maribor enjoys compared to Ljubljana, the index of the increase in the number of tourists between 2008 and 2019 shows that during this period Maribor also became an important destination for tourists from other continents, as their number increased by circa 300 per cent. Asia stands out as the area that accounted for the greatest growth. The number of tourists from Korea increased by 40 times, from China more than 10 times (Figure 4.5). Unfortunately, the circumstances related to the Covid-19 pandemic completely changed this favourable trend in 2020 and their number decreased to a total of little more than a tenth of that recorded in 2019.

Year	2008-2019		2019-2020		2020-2021	
	Tourists	Over-nights	Tourists	Over-nights	Tourists	Over-nights
Slovenia	136.4	96.0	71.0	78.0	108.8	107.9
Abroad	274.6	270.3	27.4	38.5	141.4	113.6
Other countries in the area of the former Yugoslavia	258.7	294.0	35.6	55.3	83.6	92.2
Neighbouring countries of Slovenia	210.5	208.6	30.1	38.4	106.3	91.5
Outside of Europe	312.3	269.3	11.3	17.1	102.0	104.8
Asia	590.6	475.8	9.5	12.8	77.0	91.4
North America	158.9	155.3	12.8	14.2	165.5	158.4

**Table 4.2**  
Index of changes in the number of tourists in Maribor between 2008 and 2021 according to the area of arrival of tourists (Source: SURS, 2022e, f)



**Figure 4.6**  
Share of overnight stays by tourists from 20 countries with the highest share of overnight stays in Maribor in 2020 (left) (Source: SURS, 2022e, f)

**Figure 4.7**  
Index of changes in the number of tourists in Maribor by selected countries of arrival between 2019 and 2020 (right) (Source: SURS, 2022e, f)

The Covid-19 pandemic significantly reduced tourist arrivals in 2020. The biggest contributor to this was the decline in the number of foreign tourists (Table 4.2). Compared to 2019, their number decreased by as much as 73% (from around 189,000 in 2019 to around 51,000 in 2020) and the share of foreign overnight stays as a percentage of the total fell to 78%. The drop was most noticeable with regard to tourists from other continents, whose number of overnight stays fell by almost 83%, while those from European countries fell by an average of 59%. Tourists from China (decrease by more than 96%), other Asian countries (93%), Israel (92%), the USA and Australia (87%) and Korea (85%) experienced the biggest decrease in the number of tourists (Figure 4.7). Among European countries, the number of tourists decreased the most from more distant countries, such as Sweden (by around 89%), Spain and Turkey (83%), and the Netherlands (81%). Apart from Slovenia (decrease of around 29%), the decrease was smallest among tourists from nearby countries (Croatia, Bosnia and Herzegovina, Slovakia, Germany, and Serbia).

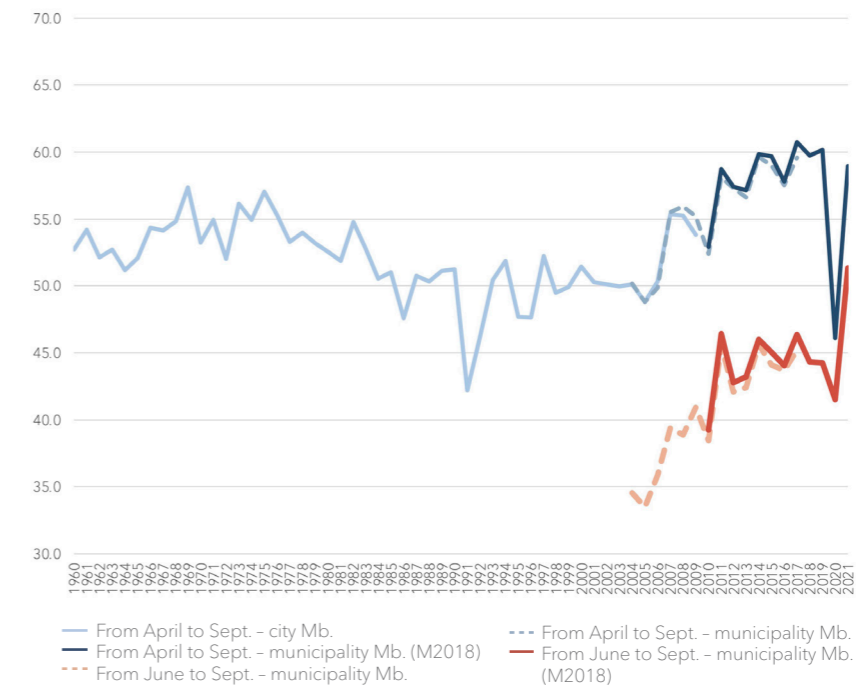
In 2021, the increase in tourist arrivals was mainly a consequence of visits from foreign tourists from nearby European countries. Among the top eight countries with the highest share of overnight stays were countries within a radius of 300-700 km from Maribor (Germany, Croatia, Serbia, Bosnia and Herzegovina, Italy, Hungary, Austria, Czech Republic); a majority of the same travelled by car.

#### 4.3.3 Seasonal distribution of tourist visits

The data shows that between 1990 and 2010, an average of 47-52% of all annual overnight stays were registered in Maribor during the summer season (from April to September) (Figure 4.8). During this period, business tourism was of greatest importance. Historically, the 1990s stood as having a lower share, when in more than half of the years, less than 50% of overnight stays were during the summer period (with the lowest share being in 1991 when the Slovenian War of Independence took place at the beginning of the summer). After 2006, with a strong increase in tourist visits and an upsurge in foreign tourists, the share of overnight stays in the summer period increased, to around 60% of yearly totals between 2011 and 2019.

The analysis of the share of overnight stays by month also shows that in the last decade the summer months (June, July, August) have been most favourable. Tourists are attracted by various events, and most foreign tourists stop in Maribor for a day or two as transit tourists or as visitors to other destinations in Slovenia. Due to the proximity of the Pohorje Mountain, some winter months (January, February) are also well represented though figures here depend, partly, on the availability of skiing. The lowest number of visitors (less than 7% of annual overnight stays) arrive during the spring months (March, April) and late autumn (November). During these two times, share of foreign tourists is also at its lowest. The distribution of overnight stays by month for 2019 also shows that overnight stays by tourists from Slovenia were evenly represented throughout the year, only February (10.6%) and August (10.3%)

stand out with higher shares. Overnight stays by foreign tourists in 2019 were above average in two summer months, in July (12.5%) and August (13.3%), when more than a quarter of all foreign overnight stays for the year were registered.



**Figure 4.8**

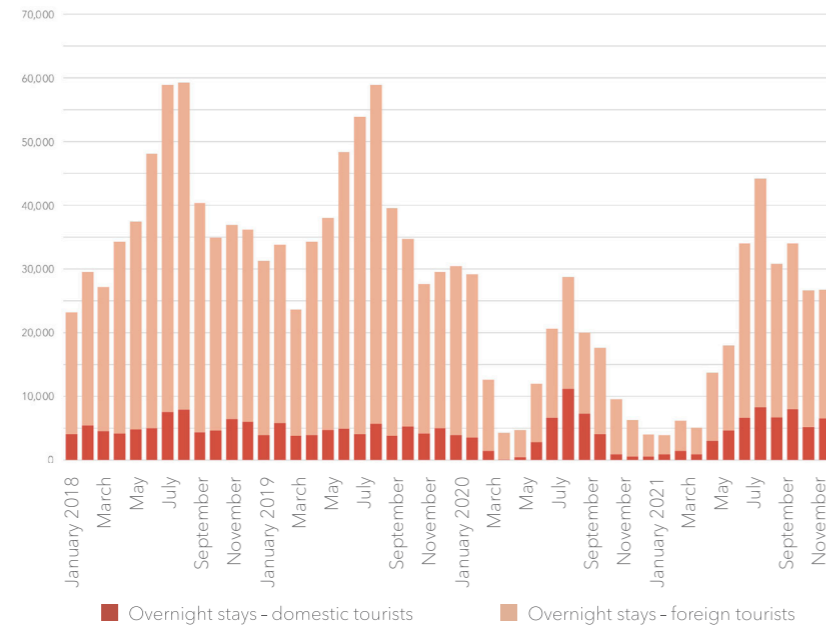
Share of overnight stays by season in Maribor between 1960 and 2021 (Source: Results of Surveys; SURS, 2022g, h, i)

The Covid-19 pandemic had a strong impact on the seasonal distribution of overnight stays (Horvat, 2021). With more than 30,000 overnight stays per month, the winter season in 2020 (January and February) started quite successfully (Figure 4.9), and then, with the spread of the epidemic, trips were cancelled, and the number of reservations decreased. A Covid-19 epidemic was declared in Slovenia on 12 March 2020, and the first wave lasted until 31 May 2020 (GovSi, 2020; Pis, 2020a). With the tightening of measures to contain the spread of the virus, pressure on the tourist economy increased. "Lockdown" resulted in the closure of all overnight establishments. Nevertheless, in April and May 2020, SURS still recorded a little less than 5,000 overnight stays in Maribor per month, most of which could be attributed to foreign students who stayed in the city.

With the abatement of the epidemic in the short summer season of 2020, tourist accommodation reopened, and in the months of July, August and September, 20,000 to 30,000 overnight stays were registered per month; half the number of the same months in 2019. The decrease was due to a significant decrease in the number of foreign tourists. The total number of nights that they stayed decreased from around 53,000 in August 2019 to around 17,000 in August 2020. At the same time, the share of their overnight stays also decreased (to 60-65%).

With the worsening pandemic crisis, the Government of the Republic of Slovenia once again declared an epidemic for 30 days on 19 October 2020 (Pis, 2020b); consequently, various measures restricted the movement of people and the operation of various activities. Between 1st and 11th April 2021, a complete lockdown of the country was ordered. In the spring of 2021, intensive vaccination of the population began, and with a certificate of recovery, vaccination, or a negative test it was possible to use tourist accommodation again. The result of all these events was that between November 2020 and April 2021 (Figure 4.9), less than 5,000 overnight stays were recorded in Maribor per month; those that were recorded were, once again, predominantly a result of foreign students who stayed in the city, but the figures also recorded some to workers who lived in accommodation facilities. The data on the average length of stay of tourists was 10-15 days during the "lockdown" in November 2020 and December 2020, and that it otherwise varied between 1.5-3 days in the other months when a larger number of tourists visited.

**Figure 4.9**  
Number of overnight stays by domestics and foreign tourists in Maribor after months in period between years 2018 and 2021 (Source: SURS, 2022h, i)



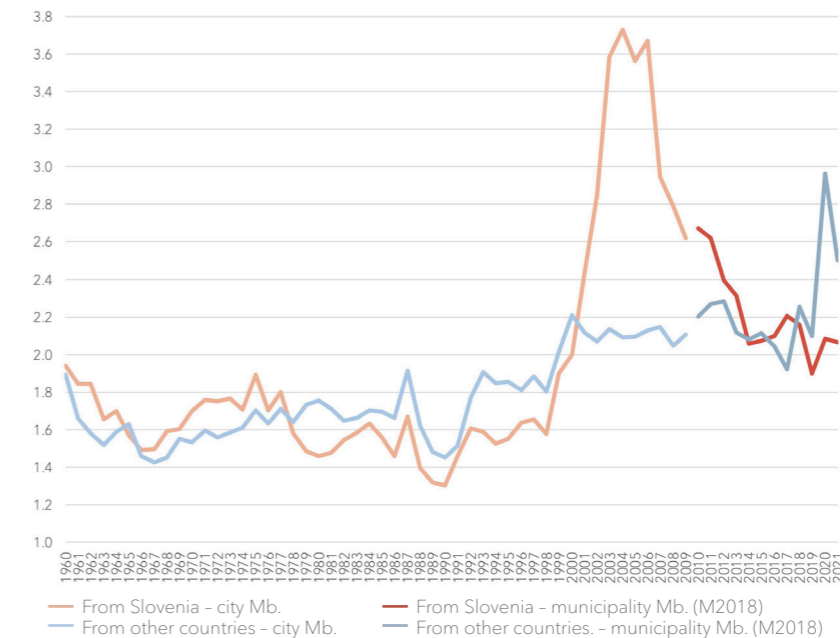
In May and June 2021, tourist visits began to gradually increase, reaching a peak in the summer and autumn of 2021. Between July and October 2021, an average of 30,000 to 40,000 overnight stays were recorded in Maribor per month, and in November and December 2021 around 26,000. The most overnight stays were recorded in August 2021 (around 44,000); an increase of 54% compared to August 2020, but still 25% less than August 2019.

In the summer and autumn of 2021, foreign tourists returned in greater numbers, and accounting for approximately 80% of all overnight stays in the city on average. In August 2021, they contributed around 36,000 overnight stays, which was still around 32% less than in August 2019. The summer of 2020 and 2021 brought another interesting tourist

trend. Due to less interest (or ability) to travel abroad and the possibility of using "tourist vouchers", which were awarded to citizens of Slovenia by the government of the Republic of Slovenia (FURS, 2021), the number of overnight stays by domestic tourists increased in Maribor. In August 2020, as much as 96% more overnight stays by domestic tourists than in August 2019 were recorded. Slovenians thus contributed as much as 39% of all overnight stays in August 2020; well above the average of previous years.

**4.3.4 Average length of stay of tourists**

In the period before 2000, the average length of stay of tourists in Maribor was less than 2 days (Figure 4.10). Most tourists visited the city for business reasons, but recreational motives (especially winter and summer recreation on the Pohorje Mountain) and transit were also important. Tourists from other countries stayed in Maribor slightly less than the average (from 1.3 to 1.6 days), with a pronounced influence of transit tourism being evident in this period.



**Figure 4.10**  
Average length of stay of tourists (in nights) in Maribor between 1960 and 2021 (Source: Results of Surveys; SURS, 2022d, e, f)

Note: Tourists from other republics of the former Yugoslavia are shown in the "From other countries" category throughout the entire period.

After 2000, the average length of stay of tourists increased above 2 days (Figure 4.10). In the period between 2001 and 2012, domestic tourists mainly contributed to this increase, with values (in terms of number of days) fluctuating between 2.8 and 3.7 days in the period between 2002 and 2008. Tourists from other republics of the former Yugoslavia, who began to return to Maribor, also contributed. The increase in the length of their stays in the winter is especially noticeable, since at that time they represented a significant part of the visitors to the Pohorje Mountain (Horvat, 2012a). After 2012, the average length of stay of domestic tourists again equalled that of foreign tourists and ranged from 2.0 to 2.2 days. Based on the above, it is obvious that Maribor does not represent a sufficiently large and recognizable tourist destination that

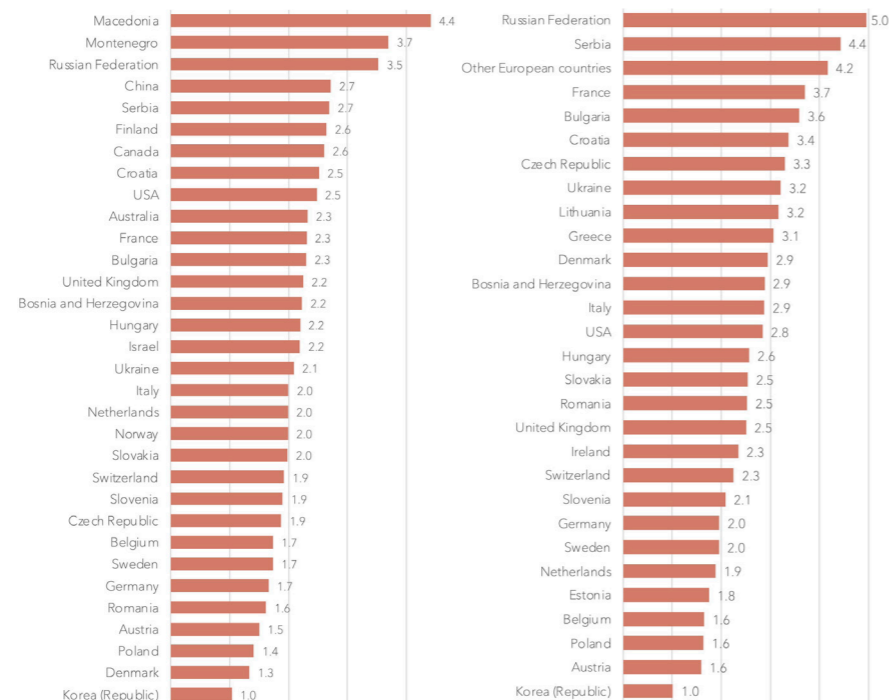
attracts tourists as a result of its tourist potential and offers to stay there for a long time.

In 2019, tourists from other republics of the former Yugoslavia and some more distant European countries had the longest average lengths of stay (Figure 4.11). Tourists from Macedonia (4.4 days), Montenegro (3.7) and the Russian Federation (3.5) stood out, followed by those from China, Serbia, Finland, Canada and Croatia (2.5-2.7 days). On the other hand, tourists from Korea spent, on average, only one night in Maribor followed by tourists from Denmark (1.3), Poland (1.4) and Romania (1.6). Tourists from nearby Austria (1.5) and Germany (1.7) also had short average lengths of stay.

In 2019, the average length of stays of tourists by month was the longest for foreign tourists in the winter months (3.1 days in January and 3.4 days in February), and the shortest periods were in the summer months (1.6 days in July and 1.5 in August), but the opposite was true for domestic tourists. In the winter months, the Pohorje Mountain is an important destination for skiers from neighbouring countries, especially Croatia and Hungary, while in the summer months most foreign tourists stop in the city of Maribor whilst 'in transit'; resultantly, they tend to only stay for a day or two.

**Figure 4.11**

Average length of stay of tourists from selected countries in Maribor in 2019 (left) and 2020 (right) (Source: SURS, 2022f)



In the last two years, there has been a noticeable increase in the average length of stays of foreign tourists. This can be attributed to their small number during the Covid-19 pandemic, when mostly only foreign students were seen in the city during the "lockdown". The data for

2020 (Figure 4.11) also shows a slightly different order of countries according to the average lengths of stay, but it should be noted that the conditions for travel due to the Covid-19 pandemic were completely different from previous years and that there were large differences in the lengths of stay and these were influenced by the small number of tourists.

#### 4.3.5 Share of tourist visits to Maribor within Slovenia

During the period of intensive tourism development before the Covid-19 pandemic, the municipality of Maribor regained its place among the most touristic municipalities in Slovenia. In 2017, Maribor was represented by 3.1% of all beds in the country, and in 2019 by 2.9% of all overnight stays and 3.5% of all tourists who spent at least one night in Slovenia. According to the number of tourists, it ranked 6<sup>th</sup> in 2019 (behind the municipalities of Ljubljana, Piran, Bled, Kranjska Gora and Bohinj), whilst it ranked in 10<sup>th</sup> place with regard to the number of overnight stays (behind the municipalities of Ljubljana, Piran, Bled, Kranjska Gora, Brežice, Bohinj, Moravske Toplice, Izola and Bovec).

Due to the Covid-19 pandemic, tourist visits to Maribor in 2020 decreased by almost two thirds compared to 2019; just over 10 percentage points less than the largest decrease during and after Slovenia's independence (between 1990 and 1995). As a result, Maribor's share of tourist visits to Slovenia also decreased. The share of tourists in Maribor in 2020 was 2.4% of all those recorded for the whole of Slovenia, and the share of overnight stays was 2.1%; mirroring the in 2010.

In 2020, the Municipality of Maribor fell from 6<sup>th</sup> to 11<sup>th</sup> place with regard to the number of tourists (in addition to those listed above, it was overtaken by the municipalities of Bovec, Brežice, Moravske Toplice, Izola and Podčetrtek), and from 10<sup>th</sup> to 12<sup>th</sup> with regard to the number of overnight stays (in addition to the ones listed above, it was overtaken by the municipalities of Podčetrtek and Zreče). Mainly due to the cashing out of "tourist vouchers", in 2020 and in 2021, the number of domestic tourists increased the most in mountain, seaside and spa municipalities, while significantly fewer people used the vouchers in urban destinations. Data for Maribor shows that in the period from June 2020 to August 2021, around 10.4 thousand tourist vouchers with a total value of €1.282 million were redeemed in the municipality of Maribor 0.67% of all value in Slovenia (MariborInfo, 2021).

#### 4.4 Types of tourism

The basic tourist potential of Maribor is represented by the city centre with its rich historical and cultural roots, cultural offers, numerous festivals and sports events, the Drava River, the outskirts of the city with the forests on the Pohorje Mountain. The rich sports offer include: skiing, hiking, cycling, adrenaline experiences, football, tennis, various outdoor and indoor sports and other forms of recreation and exercise in nature.



**Table 4.3**

Main and supporting tourist products in Maribor

Main products	Supporting products
<ul style="list-style-type: none"> <li>- <b>Culture</b> - discovering the city, sights, history, cultural institutions, contemporary and alternative art, ...</li> <li>- <b>Sport and recreation</b> - recreation of the population and tourists, organisation and implementation of sports events, ...</li> <li>- <b>Business meetings and events</b> - year-round business tourism, conferences and congresses (together with supporting events), motivational meetings, ...</li> </ul>	<ul style="list-style-type: none"> <li>- <b>Events and entertainment</b> - festivals, events</li> <li>- <b>Wine and cuisine</b> - a mix of urban cuisine and rural cuisine, wine cellars and wine roads</li> <li>- <b>Wellness</b></li> <li>- <b>Nature experiences</b></li> <li>- <b>Special interests</b> - shopping, education, gambling, ...</li> </ul>

The basic type of tourism in Maribor is urban tourism. In recent years, this has been one of the fastest growing types of tourism, but research shows that there is no general market profile of urban tourists. Each city is very specific in terms of their identities; therefore, they (individual) attract different profiles of tourists, which are defined according to how they perceive the given city and the tourist experiences available in them. Given this, we can define several types of tourism within urban tourism including, cultural, business or congress tourism, shopping, culinary, sports tourism, and so on (UNWTO, 2020).

Cultural tourism, business tourism, and sports tourism can be also defined as the main products of urban tourism in Maribor, while supporting products include events and entertainment, wine and cuisine, wellness, nature experiences and special interests (Table 4.3).

#### 4.4.1 Cultural tourism

Cultural tourism is based on the history and culture of the visited place. With regard to Maribor, and in addition to a historical view of the city, such as sites, museums, archaeological sites, architecture, it also offers the opportunity to learn about modern art and current cultural trends. This form of tourism therefore attracts tourists and visitors who are not only interested in relaxing, but also getting to know the culture of the place (Konakoğlu and Kurdoğlu, 2019). For this type of tourism, it must be emphasized that attractions are not only intended for tourists, but also ensure a higher quality of life and satisfaction of the higher living needs of the local population.

As in many other European cities that boast a medieval tradition, the most interesting part of Maribor is its narrow city centre with its narrow streets and squares and houses built on small plots. It was built in the Middle Ages, when it was surrounded by city walls, and although these features have been obscured many times due to numerous and extensive renovations over the centuries, they are still visible and interesting to visitors today. The largest area of the city centre is the Main Square with the Town Hall, and south of the Main Square where, on the left bank of the Drava River, the oldest part of the city called Lent is located (Figure 4.12). The biggest tourist attraction of Maribor is located here. A more than 400 years old vine is considered to be the oldest vine in

the world (Stara trta, 2021) and it is registered in the Guinness Book of World Records. The revitalization of this part of the city began in the 1980s, when the western part of Lent was renovated, and in addition to the residential part, many cafes and restaurants were established. The most important areas and buildings on Lent are the remains of the medieval walls (built in the 13<sup>th</sup> century and subsequently expanded in the 16<sup>th</sup>), the Water Tower with a wine cellar, the Jewish Square in the former Jewish ghetto with a preserved synagogue from the 15<sup>th</sup> century (which is one of the oldest preserved synagogues in Central Europe), the Old Vine House, the Minorite complex, and the Court Tower. Lent comes especially to life in the summer, when the international multicultural Lent Festival takes place and the embankment along the Drava River is full of cultural events and entertainment. A tourist boat runs along the river, and the tradition of rafting is also renewed every year.

Also, within the city centre are the extensive Slomškov trg with the Cathedral and Grajski trg with the City Castle (Figure 4.12). The main tourist attractions and locations in Maribor are well described in numerous tourist guides (both online and in book format) They are also well presented on the website of the Maribor Tourist Board (VisitMaribor, 2021b).

**Figure 4.12**

The main tourist attractions in the city: Lent with the Old Vine House (above), the Main Square with the Plague Column and the Castle Square with Maribor Castle (below) (Author: David Klepej, 2020)

Special emphasis should also be placed on the most important cultural and event institutions. Slovene National Theatre Maribor combines dramatic, musical and dance expression. It is also the host and organizer of the annual central festival of Slovenian drama theatres, Borštnik's Meeting, and competitions of young singing talents. Narodni Dom Maribor is an event centre with programs intended for all generations, lovers of music, theatre performances, and contemporary performing arts. The Maribor Art Gallery is one of the central museums for modern and contemporary art in Slovenia with a collection of works of art by Slovenian authors from the end of the 19<sup>th</sup> century to the present day. Many other

museums and galleries can also be found in Maribor.

Undoubtedly, the fact that Maribor was the holder of the title of European Capital of Culture 2012 represents its pinnacle achievement in the field of cultural tourism and is also the largest and most recognizable cultural project in the history of Slovenia. In addition to the direct influence on cultural activity and its development, which otherwise would not have been fully utilized, it also had a great influence on the promotion of Maribor, partner cities, and Slovenia in general. It had significant positive effects in the economic field, as, among others, in 2012 Maribor gained around 19% more tourists (and around 17% more overnight stays) than the year before, and increased tourist visits were maintained in the following years as well (Horvat, 2013).

#### 4.4.2 Sports tourism, sport and recreation

Sports tourism is a type of tourism focused on sports activities and sports events. It covers all types of recreation and sports events outside and inside the city (Termania, 2020). For cities, this type of tourism is usually not the primary type that brings tourists to the (given) destination, but existing offers can certainly enrich their stay. Another aspect of sports tourism is the organization of sports events of regional, national, continental or world importance; these can attract many visitors, especially if they are attractive for spectators. In this regard, Maribor does not have large enough sports infrastructure capacities (e.g., a large enough stadium or sports hall) to be able to host very large events of global importance.

Despite this, in 2018, Maribor held the title European City of Sport 2018, as a result of its being home to top athletes and sports teams, and at the same time, around half of the city's residents were active in sports (VisitMaribor, 2021c). There are several sports facilities and areas in the city, among which the "city ski resort" on the outskirts of the city at the foot of the Pohorje Mountain stands out. The Ljudski vrt football stadium, home of the Maribor Football Club, a 15-time national champion and a 3-time participant in the elite European competition, the Champions League, is also in the city. In 2008, the stadium was expanded so that it could accommodate around 12,000 spectators, and in 2021, the western stand was renovated. In 2021, Maribor hosted several matches in U-21 European Football Championship.

Pohorje is the most important sports and recreation area for Maribor. Every year it attracts many hikers, mountain bikers, mountaineers, and fans of skiing and sledding. The Pohorje Adrenaline Park offers various polygons, bike paths for mountain biking, and the PohorJET toboggan run. The Mariborsko Pohorje ski resort is one of the largest winter sport centres in Slovenia and envelops an area of around 250 ha. The ski slopes are about 43 km long (of which 7 km are suitable for night skiing), and the cross-country ski runs are about 27 km long. A circular cable car operates year-round, and in the winter season there are three two-seaters, a four-seater, a six-seater and 14 lifts. The first circular cable

car to the top of the Pohorje was built in 1957, and the current one was built in 2009. In its six decades of operation, the Pohorje cable car has carried close to 18 million passengers (Marprom, 2020). Traditionally, since 1964, Pohorje hosted the annual competition for the FIS World Cup in women's skiing, called the Golden Fox, as well as World Cup competitions in mountain biking.

Climate change is increasingly affecting the possibility of skiing, especially in the lower part of the ski area, which extends to the outskirts of the city and is located at an altitude of about 340 m. The long-term average number of days with snow cover is 51 (days with snow cover are those days when the ground is covered with snow at 7:00 a.m.), but between 1951 and 2017 the number of days with snow cover has decreased at a rate of 4.7 days per 10 years (ARSO, 2001). Although the last winter season, when there were more than 65 days with snow cover, was in the 2009/10, the operators of the Mariborsko Pohorje ski resort still provide more than 100 skiing days per season with the help of artificial snow. The data provided is mainly related to the upper part of the ski resort on Areh, which is located at altitudes between 1000 and 1330 m, where there have been an average of 111 operational days between 2010 and 2016 (Delo, 2016).

Maribor is also an important stop on the Drava cycling route which runs along the Drava River and connects four countries on a route of around 710 km. The route starts in the immediate vicinity of the spring of the Drava River in Italy, continues through Austrian Carinthia, progresses through Slovenia, and ends in Croatia. In 2015, the German cycling club ADFC rated the Drava cycling route in Austria with five stars, the highest possible rating for a single route in Europe; one of only four cycling routes with the highest rating. RRA Podravje - Maribor is the leading partner of the Dravska kolesarska pot project. The main goal of the project is the completion of the Drava cycling route in 18 municipalities in Slovenia. The total length of cycling routes in Slovenia is around 145 km; of which more than 60 km have been arranged since the beginning of the project (RRA Podravje, 2020).

#### 4.4.3 Business and congress tourism

Business tourism is divided into individual business tourism, in which a person or a small group usually participates in work duties, and congress tourism, in which many people meet for business, educational, or research purposes. Business tourists come to the city for business purposes, but at the same time they can also visit tourist attractions and use other services. With this type of tourism, it is important to note that participants spend up to three times more money than classic tourists. Another advantage is that this form of tourism is not seasonally limited; this form of tourism helps to fill capacities outside the main tourist season.

Business and congress tourism is present in Maribor to a significantly lesser extent than in Ljubljana and other major congress centres in Slo-

venia, although in the past (i.e., in the period of the former Yugoslavia) it had a very important role. Although some tourist providers promote themselves as business hotels and conference service providers, this form of tourism in Maribor is underrepresented; such tourists are predominantly regional or nationally-based.

#### 4.4.4 Supporting tourist products

Supporting tourist products include events and entertainment, wine and cuisine, wellness, nature experiences and special interests (shopping, education, gambling, and so on). In many cases these can also become the main motive for visiting a certain city. They can also be seen to complement and enrich primary tourist offers.

Maribor is the venue of the largest Slovenian open-air multicultural festival called the Festival Lent. It incorporates a series of events in the fields of music, ethnology, theater, sports activities, cuisine, and so on. The city hosts the most prestigious Slovenian theatre Festival Borštnik's Meeting, the music Festival Maribor, many (mainly ethnological) events related to Stara trta vine, and many others. Culinary offers are also increasing and supplement the excellent wine offers available in the city's surroundings. The natural environment of Maribor and its surroundings allow for a variety of experiences. Maribor has one of the most beautiful city parks in Slovenia; it is surrounded by the wine hills of the sunny Slovenske gorice hills. The green forests of the Pohorje Mountain are interspersed with many hiking and cycling trails. The Drava River meanders through Maribor and further along the Drava Valley, and upon this you can ride a traditional raft, and the international Drava cycling route also runs along the river. In the last decade, niche tourist products from several areas (e.g., Chocolate Village along the Drava River) have been expanding more and more (RTVSLO, 2020b; MariborInfo, 2020b), all with the aim of diversifying the offers available to tourists and attracting more of the same to the city (and for longer).

Based on our analysis of tourist potential and offers, we estimate that sports tourism is the most developed in Maribor, but it still has some further untapped potential, especially with regards to issues of infrastructure and advertising, as well as the use of the Drava River which is underutilized. Sports tourism is followed by events tourism. Here, the problem is the concentration of events during the summer season. Cultural, business tourism, culinary and shopping tourism are moderately developed. In the field of cultural tourism, more offers could be aimed at families, while business tourism has limited development opportunities due to the size of the city's capacities. Culinary tourism needs more advertising and the cooperation of providers, implementation in open-air spaces, while shopping tourism needs the city to provide a greater variety of offers and more specialized stores.

## 4.5 Types of visitors

In Slovenia, periodic surveys in the field of tourism are carried out by the Statistical Office of the Republic of Slovenia. It conducted a survey among foreign tourists in Slovenia in 2015 and 2019. In contrast to Ljubljana, for which the results of these surveys are representative, this is not the case for Maribor. This is because the sample included in the survey was too small. The only large-scale research in this field in the last decade was carried out by the Valicon marketing consulting company, which in 2018, commissioned by the Maribor-Pohorje Tourist Board, conducted a field survey of visitor flows in the city of Maribor during the summer season (Valicon, 2018). The main purpose of the research was to find out the composition of tourists, target groups, points of interest, what products they were looking for, what they liked and what they found to be lacking. 305 respondents were included in the survey, including day visitors as well as tourists staying overnight in the city or surrounding area.

An important part of the research was aimed at identifying target groups of Slovenian tourism, so-called "tourist personas". Each segment group is characterized by different motives and benefits, interests or activities, as well as expectations and fears. The basic three segment groups of guests, which arise from three overarching motives and their related interests (and are further divided into twelve tourist personas) are: "explorers" (looking for experiences), "social butterflies" (looking for socializing) and "muses" (taking care of yourself). Explorers put experiences in the foreground and four groups of tourist personas emerge from this group: green explorers, adventurers, active families, and urban conscious. The second group is the sociable people who prioritize spending time with their company or family; five groups of tourist personalities emerge from this group: devoted mothers, active nostalgic, carefree youth, urban consumers, and social foodies. The third group is represented by the so-called "muses", who prioritize self-care; three groups of tourist personalities emerge from this group: spoiled lovers of beauty, forever young, and relaxed escapists.

Four groups of tourist personas were most represented in Maribor. The dominant group was represented by so-called green explorers (as much as 41% of all respondents) who want to learn about new lands and experience diversity. They consider a developed infrastructure for cyclists, pedestrians and public transport to be important. They are interested in nature and culture; they prefer to discover the world around them by themselves. In this segment, compared to others, the points of interest are much more concentrated in the Pohorje Mountain area than in the city centre.

This group was followed by the urban consumers group (12%) who like to visit capitals, enjoy cities and pamper themselves (spa, wellness). Their primary motives for traveling are socializing and spending time with friends. They are interested in cities, consumption, entertainment,

and pleasure. 8% of them ranked in a group of carefree youth who want to visit the main tourist attractions and have fun at the same time. Spending time with their friends means a lot to them. Reasonable prices are important, but they are also willing to spend a little more money for nights out with friends. Likewise, 8% of the respondents were also included in the so called forever young group. Health means the most to them, which is why they like to use medical wellness centres or services that offer them comprehensive medical examinations and therapies when they travel. In addition, when traveling, they want to get to know the (given) country (nature, history, cuisine).

In contrast to Ljubljana, in which a similar analysis found that in addition to urban consumers and carefree young tourists, urban conscious and social foodies are also among the more frequent tourist types, the latter two groups in Maribor are among the least frequent (only 3% of respondents each). Urban conscious people are mainly interested in culture and cities, and they are attracted by differences, variety, and less typical tourist offers. Most likely, Maribor is too small a city for this type of tourist segment, and it may also be the case that it is also too similar to other medium-sized cities in the wider region. The same is most likely true for the social foodies group, whose primary motive is to taste and experience culinary excesses. Maribor does offer some offerings of this kind, but it is still not sufficiently developed and recognized among consumers with regards to the same.

#### 4.5.1 Basic characteristics of tourists

For the purposes of our research, we conducted a survey of tourists in Maribor in the summer season of 2021. However, due to the Covid-19 pandemic we only managed to gain a small number of respondents (n = 63). It should also be noted that a condition for inclusion in the research was that the respondents had spent at least one night in the city. Despite the small number of respondents, we can draw some conclusions. We also compare our findings with findings from 2018 (n = 305) (Valicon, 2018).

As in 2018, when a good half (56%) of all respondents represented the so-called travellers "in transit" who came to Maribor from other destinations and there after continued their journeys to other destinations, we found that for half (51%) of the 2021 respondents, Maribor was only a stop on the way. Therefore, it is not surprising that almost three quarters of them arrived in Maribor by car. This shows the extremely high dependence of tourism in Maribor on transit tourists. Most of the surveyed visitors to Maribor in Slovenia also visited Ljubljana, the coast, or the Gorenjska region (Bled, Bohinj); all of which are among the most visited tourist destinations in the country. The research showed that, given the geographical position of Maribor and the locations of the main tourist destinations in Slovenia, Maribor can expect mainly day visitors and transit tourists. For this reason, the promotion of Maribor in the future should be directed primarily to those areas from which the city can expect a greater share of tourists who will spend the night in the city.

In 2018, approximately two-thirds (65%) of the surveyed visitors were in Maribor for the first time, and in 2021, this proportion was circa 62%. Almost four fifths of them came to the city planned, the rest spontaneously. Visitors who visited other destinations before visiting Maribor decided to visit Maribor more spontaneously than visitors who came to Maribor directly from home. In 2018, it was noted that less than half (44%) of the surveyed visitors came to Maribor as a couple, and that another good quarter (27%) came with their families. In 2021, the findings were similar, with the difference being that the share of family trips was slightly lower (17%). The findings from both surveys point to the fact that Maribor is not a family destination for the most part. It is more often visited by couples, groups of friends (together they represent more than half of all respondents in 2021) or individuals (approximately one fifth of respondents in 2021).

In 2018, almost two-fifths of the surveyed visitors spent at least one night in one of the hotels in Maribor or the surrounding area, and in 2021 this proportion decreased to about a quarter. The growing importance of other accommodation facilities is indicated by the fact that in 2021, almost half of them (49%) used accommodation in the form of B&B, boarding house, hostel or Airbnb. Most of the reservations were made through the Booking.com portal, and for booking a hostel, apartment or private room, the Airbnb service was the most widely used.

#### 4.5.2 Motives for visiting the city and tourist satisfaction

In 2018, surveyed visitors to Maribor (Valicon, 2018) cited relaxation, getting to know new things (country, people), visiting cities, experiencing other cultures, and visiting a beautiful destination as the main motives that guided them when choosing a tourist destination. The most important activities for them on vacation were visiting the old city centre (65%), recreation (45%), contact with nature (43%), sports activities (39%), visiting the main tourist attractions (30%), and gastronomic pleasures (29%). As the survey was conducted during the summer season, only 3% of respondents mentioned a business motive. In another survey conducted by the Maribor Tourist Board in August 2019 and January 2020 (ZTMP, 2020b), 43% of them stated that they came to Maribor to see the sites, 18% to visit friends or relatives, and 10% for business or other reasons.

Our research in 2021 revealed similar findings. Among the most numerous motives were sightseeing, cultural events, sports events, visiting friends and relatives, spending a vacation, gastronomic pleasures, and so on. We also emphasize the business and educational motives (students through the Erasmus+ exchange) and the fact that as many as 5% of respondents benefited from "tourist vouchers". According to SURS data, in 2021 the average length of stay of tourists was 2.4 days (SURS, 2022); of the surveyed visitors half of them (57%) spent one night in Maribor, while less than a third (30%) stayed for more than two nights.

In 2021, more than two-thirds of respondents indicated at least one thing that particularly impressed them during their visit. The most com-



mon elements of enthusiasm were the beauty of the city (almost half of them), and the calmness and friendliness of the locals. This was followed by beautiful nature ("green city"), good food, safety, and cleanliness. More than a fifth of the respondents also pointed out that Maribor is a small city and that there are not enough events, especially performances on the streets.

#### 4.5.3 Interest in tourist attractions and locations in the city

In the research, we also wanted to find out to what extent visitors and tourists in Maribor know and visit individual tourist attractions in the city. As expected, the most recognized attractions and locations in Maribor, which are also mentioned most often in guides and blogs, were visited by more persons. More than 90% of the respondents recognized the photographs of the Main Square, Plague Column and Castle Square, and 80-90% recognized the Town Hall, Freedom Square, Slomškov Square and the Cathedral. The most important open spaces (squares and streets) were also recognized by a high percentage of respondents (Horvat and Stubičar, 2021).

The results of visits to tourist attractions and locations were quite similar. More than 90% of the respondents visited the Main Square and Plague Column, and 80-90% visited Castle Square, City Hall, Slomškov Square and Freedom Square. Due to the distance from the strict city centre, only 75% of respondents had visited Lent at the time of the survey. Open spaces stand out with higher shares, meaning that tourists prefer to enjoy the city life atmosphere than visiting classical museums. Among the alternative attractions and locations with the highest percentages of visitors were Maribor marketplace (40%), the shopping centre Europark (38%) and Piramida hill (30%), while the lowest were establishments for which an entrance fee must be paid, e.g., the Art Gallery and Museum of National Liberation (13%).

The Military Museum of the Slovenian Army (58% of respondents) stands out among the sights and locations that respondents declared they were not interested in and did not intend to visit them, followed by 40-50% for Maribor marketplace, Ljudski vrt football stadium, Maribor Island area, Minoritski monastery and driving along the Drava River. Even for many cultural institutions, interest was relatively low. It is interesting that a significant number of the respondents showed great interest in some locations, while at the same time a large proportion of people who were not interested in the same was also apparent; for instance, Maribor marketplace and the Maribor Island area on the Drava River.

The results of the survey confirmed that most tourists are only interested in visiting the main tourist attractions and locations in the city centre, and the area at the foot of the Pohorje Mountain, with interest in alternative tourist locations being very low. Interest in aspects beyond the city centre was more typical only for visitors who had previous experience of Maribor. The spatial distribution of the routes they took in

Maribor is shown in more detail in Chapter 7. Most of the routes around the city were made by tourists on foot and they only used cars to visit the area below Pohorje Mountain. The results also reflect the fact that tourists predominantly visit Maribor only for a day or two. This contrasts with the efforts of the tourism promoters in Maribor, who promote and invite tourists to extend their visits to Maribor by presenting many experiences in the city and the surrounding area, which are intended for "lovers of wine and cuisine", "explorations in nature", and sports activities. In the case of locations that are slightly further away from the city, the important fact is that visitors mostly come to Maribor by car and therefore visits to these locations are relatively easily accessible.

#### 4.6 Composition of employment in tourism and catering

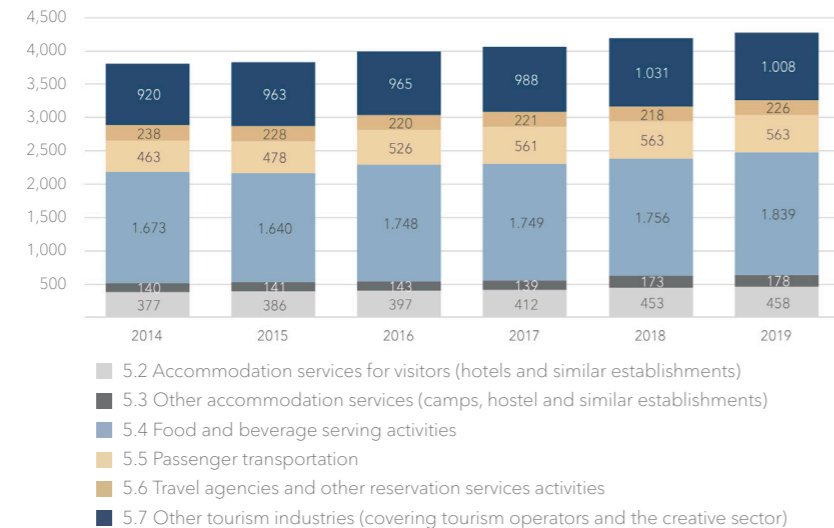
The group of employees in the field of tourism in Slovenia also includes employees in catering and transportation. The group is divided into six categories: 5.2 - accommodation services for visitors (hotels, etc.); 5.3 - other accommodations; 5.4 - food and beverage service; 5.5 - transportation of passengers; 5.6 - organization of travel; 5.7 - other tourist industries. The categories are defined within the Standard Classification of Professions (SKP-08). We obtained the data from the Statistical Office of the Republic of Slovenia in 2021 (SURS, 2021b). The data does not include students employed in the field of tourism. According to the e-student service data we received for the years 2019 and 2020, approximately 12% of all student work is done in the field of catering and tourism. In 2019, 1,349 advertisements were published, of which 71% were in service, 17% for work in kitchens, 7% for promotions, hostesses and tastings, and 5% for work in receptions. In 2020, the number of advertisements decreased by 25% (1,034 advertisements), but the ratio between jobs advertised remained the same.

We note that, in line with the increase in tourist visits to Maribor, the number of people employed in tourism, catering and transportation has also increased (Figure 4.13), namely from 3,811 people in 2014 to 4,272 in 2019; an increase of 12.1%. At the same time, their percentage share as a fraction of all employees in Maribor decreased, as in 2014 it was 6.9% (3,811 out of 55,310 total employees), and in 2019 it was 6.7% (4,272 out of 63,643 total employees). In 2019, according to individual categories, 43% were employed in food and beverage services, 23% in other tourist industries, 13% in passenger transport, 10% in accommodation services for visitors (hotels, etc.), 5% in travel agencies and other reservation services, and 4% in other accommodation services (SURS, 2021b).

We particularly emphasize the composition of occupations within three categories. A total of 458 people were employed in the category of accommodation services for visitors (hotels and similar establishments) in 2019. The majority were waiters (30%), followed by hotel receptionists (21%), cleaners, servers and domestic helpers in offices, hotels, and

other institutions (21%), chefs and cooks (16%). Other professions were represented by sales, advertising and marketing specialists, marketing and sales managers, foremen in cleaning activities in hotels and similar establishments, and managers in restaurants and similar catering establishments (around 7%).

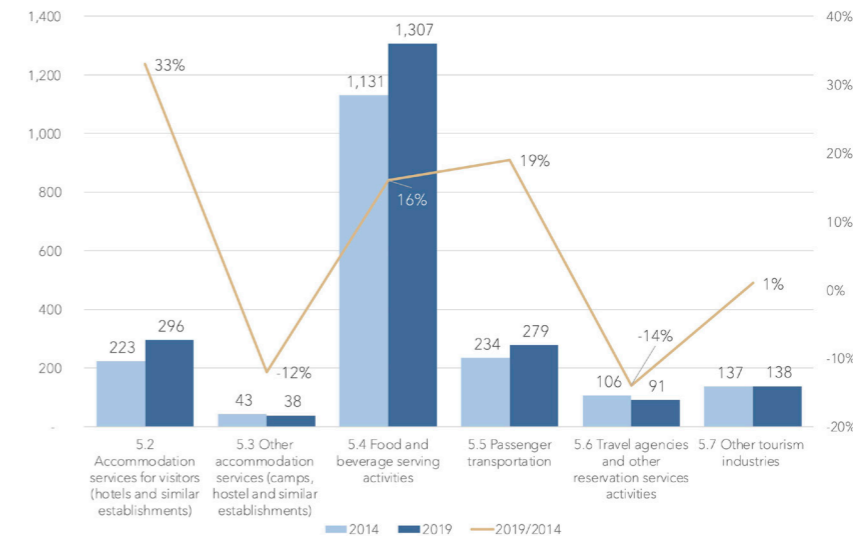
**Figure 4.13**  
Composition of employees in tourism and hospitality in the municipality of Maribor in the period between 2014 and 2019 (Source: SURS, 2021b)



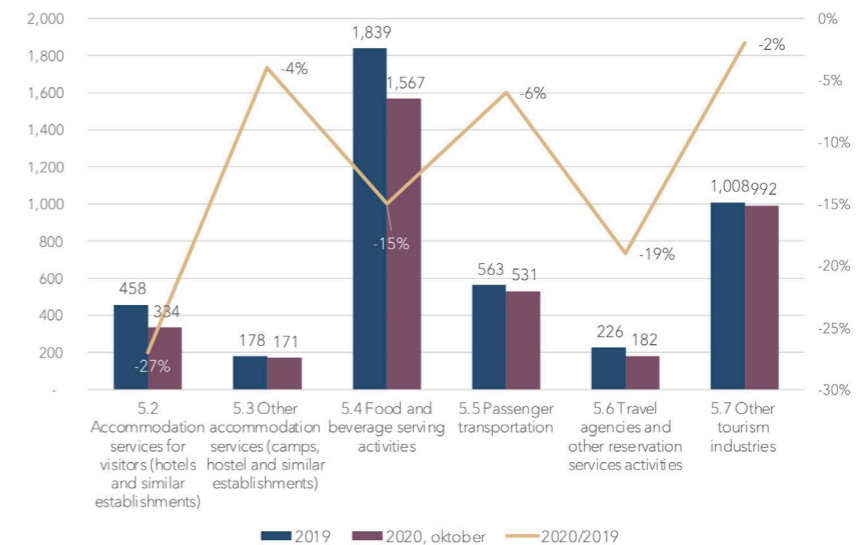
In 2019, 1,839 people were employed in food and beverage services, which represented around 3% of all employees in Maribor, and around 43% of all employees engaged in tourism. It is one of the more diverse occupational categories (11 groups), in which waiters dominate with 61%, followed by chefs and cooks (23%), managers in restaurants and similar catering establishments (9%). The "other category" group includes professions such as: managers for personnel and general affairs, trade managers and foremen in cleaning activities in hotels and other institutions which accounted for only 22 persons or 2%.

In the category of employees in travel agencies, 226 people were employed in 2019, among whom the group of agents in tourist and travel agencies dominated with 62%, followed by guides (13%) and experts in the development and sale of tourist products. The category of professionals and managers accounted for less than 5%.

In the period between 2014 and 2019, the category of employees in the group of other accommodation services stands out as having undergone the greatest change. Their number increased by 27%, followed by the category of passenger transportation with 22% and accommodation services for visitors (hotels, etc.) with 21% (Figure 4.14). The food and beverage service category had the largest number of employees (1,839 people in 2019), so the increase compared to 2014 was smaller (10%). The category of travel agencies and other reservation services is the only one in which there was a decrease in the number of employees detected. In 2014, 238 people were employed in this category, and in 2019, there were 226 people (a decrease of 5%).



**Figure 4.14**  
Change in the number and share of employees between 2014 and 2019 according to the main groups of professions in tourism and catering in the municipality of Maribor (Source: SURS, 2021b)



**Figure 4.15**  
Comparison of the number and share of employees between 2019 and 2020 according to the main groups of professions in tourism and catering in the municipality of Maribor (Source: SURS, 2021b)

Due to the Covid-19 pandemic, there was a large decrease in the number of employees in the tourism and catering industry in the municipality of Maribor in 2020; their number decreased by 22% compared to 2019 (Figure 4.15). Due to the closure of hotels and similar establishments during the pandemic, the category of accommodation services for visitors had the biggest decrease (-27%), followed by the travel agencies and other reservation services (-19%). The smallest negative was in the category of other tourism industry (-2%) and other accommodation services (-4%). In terms of the number of employees, the largest category of activities was food and beverage services; the number of employees decreased by 272 people during the period under consideration.

The change in the labour force on a monthly basis showed a slight seasonal increase, namely by around 2% in the summer season between May and August 2019, while in September and October 2019 there was a decrease of 2.6%. In 2020, the monthly fluctuations were even

greater, especially in the food and beverage service categories, passenger transportation, travel agencies and other reservation services, and other tourism industries; all impacted by the Covid-19 pandemic. It should be emphasized that this is an analysis of full-time employees. This analysis does not, therefore, include casual jobs (especially student work), which are particularly common or even dominant in the category of food and beverage service activities, and which were especially affected by the pandemic.

#### 4.7 Residents' views on tourism

Zavod za turizem Maribor – Pohorje je v letu 2019 (ZTMP, 2020b) izveln 2019, the Maribor – Pohorje Tourist Board (ZTMP, 2020b) conducted a survey that analysed the views and satisfaction of Maribor residents with regards to tourism in the locality. All 82 respondents supported the tourist development of the destination. On a rating scale of 1 (do not agree at all) to 5 (strongly agree), the mean score was 4.0, they estimated that the positive effects of tourism in the city outweighed the negative ones. With a score of 4.0, they estimated that tourism in Maribor was developing better than other economic sectors. 4.4 was the assessment of the statement that an increase in the number of tourists led to the development of the local economy. With a score of 4.5, respondents estimated that the entire local community benefitted from tourism, and with a score of 3.5, that the residents of the city also benefit. With a score of 4.5, they also estimated that tourism has had a positive impact on local identity, culture and heritage. A score of 3.6 was awarded with regard to the idea that tourism cares for the protection and preservation of nature, with the same score being given with regard to tourism strengthening ecological awareness. That the development of tourism contributes to the quality of life at the destination received a score of 4.0.

The residents of the city rated statements about the negative effects of tourism with rather low scores. The statement that tourism causes pollution was awarded an average score of 2.5, whilst the statement that the growth of tourism increases traffic problems in the destination received a score of 2.7. The respondents least agreed with the statement that the number of tourists in the high season is disturbing (1.6); from which we can assess that tourism in Maribor does not yet bring major negative effects and we cannot yet, therefore, talk about overtourism. With a score of 3.0, respondents estimated that they can participate in planning the sustainable development of tourism. They also agreed that they are relatively well informed about the development of tourism. Satisfaction with the work of the organization that takes care of the development of tourism was given an average score of 3.9.

A review of the responses of the population and individual stakeholders in tourism in the local newspapers also evidences some weak points. Among the interesting opinions we mention the following, that

Maribor should focus more on its comparative advantages in its tourist promotions and offers. In addition to so called "white" Pohorje tourism should better valorise use of the "green" Pohorje, both banks of the Drava River and the vineyard surroundings, since the vineyards are almost in the middle of the town, and Maribor's Stara trta is even the oldest vine in the world. In addition, there were also opinions suggesting tourist development in Maribor is insufficiently planned and that everything depends too much on the skills, knowledge and ambitions of individual providers (MariborInfo, 2020c).

#### 4.8 Conclusion

After Ljubljana, Maribor is the second most important urban tourist destination in Slovenia. Regarding the number of tourists, the municipality of Maribor was ranked 6<sup>th</sup> in 2019, and with regard to the number of overnight stays, it ranked 10<sup>th</sup> among all the municipalities of Slovenia. The growth in the number of stays was highest in the years before the Covid-19 pandemic and reached its peak in 2018 with about 466.000 stays. The more intensive development of tourism in Maribor has been slowed down by its relatively poor international railway connections, as well as the absence of regular air connections at the domestic airport; both represent great unused potential. As a result of such deficiencies, tourism remains largely dependent on transit tourists who travel predominantly by car.

Because of these varied factors, Maribor has a significantly smaller gravitational draw to tourists than Ljubljana. The city attracts mostly tourists from the countries of Central and Eastern Europe, such as Germany, Croatia, Poland, the Czech Republic, Hungary, Romania and Ukraine, and the share of their overnight stays in Maribor is at least twice as high as that of Ljubljana. At the same time, however, the share of overnight stays by tourists from the USA, China, Australia and other overseas countries is much lower in Maribor. In 2019, tourists from outside Europe contributed only about 9% of overnight stays, while they accounted for about 25% in Ljubljana.

The Covid-19 pandemic had strong impacts on tourist visits to Maribor. In 2020, only one-third of the visitors from 2019 visited the city, and overnight stays fell by 57% to pre-1970s levels. Due to the city's dependence on transit tourists from Central and Eastern Europe, this decrease was somewhat smaller than in Ljubljana, where the number of tourists and overnight stays decreased by as much as 76%. The data for 2021 shows growth again, but the 103,000 tourists who visited in 2021 still represents only 47% of the total number of tourists who visited in 2019, and the 247,000 overnight stays in 2021 is equivalent to only 54% of the number of overnight stays in 2019.

From the data on the volume of tourist visits (Table 4.4), Maribor can be seen to lag far behind visits to nearby larger cities. In the triangle

between Ljubljana, Zagreb and Graz, Maribor is a smaller urban destination, both in terms of its population and the number of overnight stays that take place therein. In contrast, Zagreb has, for example, 6.8 times more inhabitants, while Graz and Ljubljana are 2.6 times larger in population terms. Since Ljubljana and Zagreb are capital cities, both saw several times more overnight stays in 2019; Zagreb 5.8 times more, and Ljubljana 4.9 times, while the ratio with Graz was the same as for the population (2.6 times more).

If we convert the absolute data into relative data, we find that according to some indicators, Maribor is not so far behind either the two capital cities or the second largest city in Austria. Maribor city takes first place according to the data on the intensity of the tourist visit, which is expressed by the ratio between the number of overnight stays and the number of residents in the tourist destination (Table 4.4). In 2019, Ljubljana stood out with an above-average number of tourist visits with 7.7 nights/inhabitant, while the values in Graz and Maribor were similar (4.3 and 4.0), and in Zagreb the figure was only 1.8. With a sharp decrease in tourist visits in 2021, the values in all cities decreased and became more equal (in Ljubljana, for example, the figure fell to 2.9, in Maribor it fell to 2.2, and in Graz it fell to 2.4). These are typical figures or destinations with developed urban tourism, in which no excessive phenomenon of overtourism has yet been detected. Gusman et al. (2020) provides data for some European cities for 2016, among which Venice stands out with a value of 39.9 overnight stays/inhabitant, while the figures for Barcelona and Berlin were 12.6 and 8.8 respectively.

There were similarly equalized values for the indicator of the average length of stays of tourists. The fact is that in 2019 and in 2021, Maribor stood out with the longest period (2.1 overnight stays/tourist in 2019 and 2.4 in 2021), while the values in the other cities in 2019 were 1, 8-2.0 nights, and in 2021 1.9-2.2 nights. Maribor was also not far behind in terms of the share of overnight stays by foreign tourists, which in 2019 ranged from 83-96% in Zagreb, Maribor and Ljubljana, while Graz stood out with a lower share (52%). In 2021, the shares in all cities decreased slightly, but even in this year Maribor was in second place, behind Ljubljana, with 79%.

As noted, the basic tourist potential of Maribor is represented by the city center with its historical and cultural roots, cultural offers, numerous festivals and sports events, the Drava River, the outskirts of the city with the forests on the Pohorje Mountain, the sunny wine-growing landscape and its developed tourist infrastructure. Analysis, including the findings of the workshop on urban tourism and spatial planning within the MESTUR project (Stubičar and Marot, 2020), show that the tourist potential of the city and its surroundings should be used more in the future, while at the same time tourist offers should be supplemented, so that more tourists visit the city and stay for longer.

	Maribor	Ljubljana	Graz (AT)	Zagreb (CRO)
Number of overnight stays (in thousands) 2019	454	2,228	1,250	2,639
Number of overnight stays (in thousands) 2021	247	866	701	1,375
Number of nights per 1 night in Maribor 2010	1.0	3.9	3.8	4.8
Number of nights per 1 night in Maribor 2019	1.0	4.9	2,6	5.8
Number of nights per 1 night in Maribor 2021	1.0	3.5	2.8	5.6
Change in the number of overnight stays 2010-2019	+110%	+165%	+52%	+156%
Change in the number of overnight stays 2019-2020	-57%	-76%	-53%	-70%
Change in the number of overnight stays 2020-2021	+26%	+60%	+20%	+76%
Share of overnight stays by foreign tourists in 2019	88%	96%	52%	83%
Share of overnight stays by foreign tourists in 2021	79%	86%	45%	74%
Average length of stay of tourists (days) 2019	2.1	2.0	1.8	1.8
Average length of stay of tourists (days) 2021	2.4	2.1	1.9	2.2
Number of overnight stays per inhabitant 2019	4.0	7.6	4.3	1.9
Number of overnight stays per inhabitant 2021	2.2	2.9	2.4	1.8

**Table 4.4**

Selected indicators of tourist visits in Maribor and neighbouring city destinations in the period between 2010 and 2021 (Source: SURS, 2022f; WIBIS, 2022; DZSRH, 2022)

Maribor has a relatively rich historical and cultural heritage, but due to its regional importance, it has not fully realised its international tourist potential. Only Lent stands out with the oldest vine in the world, which should become one of the most important elements of tourism promotion for the city. The important tourist potential of the city is also represented by internationally recognized cultural institutions and events, including mass cultural events. From this point of view, the fact that Maribor held the title of European Capital of Culture in 2012 is important; it should be used more in international promotion, although the title itself, as shown by the study of Kovač and Srakar (2013), did not have long-term effects on development of cultural offers in the city.

Equally important is sports-recreational tourism, mainly due to good conditions in the winter and summer seasons. The Pohorje Mountain and many internationally recognized sports events are extremely important elements in the city's international visibility. Due to dilapidation, it would be necessary to renovate and expand some facilities. Another and very important issue is climate change as it limits the implementation of winter sports events, and especially those related to the e World Ski Cup. There is also a spring of thermal water in the town, the use of which for recreational and health purposes is currently limited. In the future, this offer should be intensified and connected more with existing wellness and medical therapeutic offers by developing modern spa tourism. The area along the Drava River should also be better set out and its use for recreational purposes should be intensified.

The city has modern and diverse accommodation facilities that offer good conditions for business tourism and the holding of various meetings and congresses. With targeted marketing and the specialization of individual tourist providers, as well targeted expansion of capacities, Maribor could develop into one of the most important event and con-



gress destinations in Slovenia. Unfortunately, Covid-19 greatly weakened the financial situation and additionally contributed to the closure of some accommodation facilities.

When designing tourist development and strategies, the positive attitude of the residents of Maribor should also be considered; they are in favour of the development of tourism and believe that it has a positive effect on local identity, culture and heritage, as well as the protection and preservation of nature. According to them, tourism does not yet bring negative effects. An expert workshop on the topic of strategic management of tourism and spatial planning in Maribor (Stubičar and Marot, 2020) also showed that spatial planning supports or follows the development of tourism, while also providing appropriate measures for spatial limitation and the monitoring of tourist activities.

In the end, we can summarize that the tourist potential and capacities of Maribor and its surroundings are not yet sufficiently utilized in terms of tourist flows and offers. The results of the survey confirmed that most tourists were only interested in visiting the main tourist attractions and locations in the city centre, and beyond that the area at the foot of Pohorje Mountain, while interest shown in alternative tourist locations was very small. Interest outside the city centre was greater for those who had previously visited. In the future, the management and planning of accommodation capacities should also be improved, and from the point of view of economic justification, better utilized outside the main tourist season. Considering Maribor's comprehensive offers, this should not be a major problem, but a challenge for the future.

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## Section B

### Urban tourism governance



## Chapter 5

### Territorial impact assessment as approach to evaluate impacts of urban tourism

Naja Marot and Nina Stubičar





## 5.1 Introduction

Tourism is an important economic activity; it contributes to local economic development, and it enables the exchange of ideas, experience, and culture. In this way tourism activities contribute to the creation of a higher quality of life in tourist destinations, while at the same time causing negative impacts that there being too many tourists and visitors to some destinations (Frent, 2016; Riberiro et al., 2017). These impacts are often described as multipliers, i.e. they have impacts on several thematic fields at the same time and are identified as either negative or positive. Due to the increasing scale of these impacts in urban and other destinations, various methods of evaluating them have been developed. Simply, these can be divided into qualitative and quantitative methods of assessment. In quantitative assessments, one relies on numerical indicators and objective data, drawn from different databases, to define more precisely what and how big the power of impacts is (Dimitrov, 2009, Gursoy and Nunkoo, 2019). Such evaluation approaches are implemented by economists who use modelling, multivariate statistical methods, and correlation analysis to identify links between the causes of impacts and their consequences. For example, Shoval and Raveh (2004) utilized a multivariate analysis to determine the links between the type of travel to a chosen city destination and the tourist attractions that tourists visit. Quantitative evaluation methods include a survey questionnaire as well, especially if data is captured and processed across a large sample of a population. The most frequently used indicators in quantitative assessments include the number of nights stayed, the number of domestic and foreign tourists, arrivals (annual and monthly), average overnight stays in terms of length, and tourist consumption (monetary).

Qualitative methods of assessing the impacts of tourism are based on the collection of information from different thematic fields; most often these are not measurable or are not available in public databases. Qualitative assessment gives a broader picture of impacts, but cannot be generalised as they have been captured using a smaller sample. Qualitatively, we also cannot clearly estimate the extent of the impacts, however, their characteristics can be described in more detail. Qualitative assessment methods include: cost-benefit analysis (CBA) (Mules and Dwyer, 2005; Baez and Herreo, 2012), usually applied to evaluate impacts of an investment and development interventions, observations (Milan, Novelli and Cheer, 2019), and interview (Nepal and Jamal, 2011), which allow for the acquisition of more in-depth information, a focus group (Bellato and Cheer, 2021). Most commonly, a case study approach is also used; this combines several data retrieve approaches (Gursoy and Nunkoo, 2019).

Several methodological approaches are also combined when using during mixed-method assessment as this relies on both qualitative and quantitative approaches. In such cases, the qualitative data is used to provide a more complete picture than just numerical data. Lindlof and Taylor (2002) used such an approach in their inquiry into tourism impacts and suggested that the use of structural interviews enable the collection of data with a set of sub questions. In this case, the quantitative data explains more about the growth of property prices and services related to the economic picture of the destination, and qualitative data was used to describe the relationships that inhabitants have towards tourism (Gursoy and Nunkoo, 2019). Another example of the mixed method approach to the impact assessment of urban tourism is the carrying capacity of the destination *approach* (Shelby and Heberlein, 1986). The World Tourism Organisation defines carrying capacity as the maximum number of people who can visit a destination at the same time without affecting its cultural, physical and economic characteristics and the quality of life of the population in the area (WTO, 2022). The carrying capacity therefore determines the maximum number of visitors that a destination can accommodate over a given period of time.

The concept of carrying capacity is defined more precisely depending on the type of the area and the thematic field concerning capacity. The classification of the different types of carrying capacity was derived from the ESPON project, devoted specifically to this concept (Schuh et al., 2020; Wikipedia, 2021). Physical carrying capacity is defined by the maximum number of people who can be received at a specific area or tourism attraction whilst still allowing the movement of people. Economic carrying capacity is bounded to the level of admissible change in a local economy or the level to which the destination can adapt to tourism without losing its functions. Social carrying capacity depends on the negative impacts of tourism, namely the lowering of residents' acceptance level of tourism and poor experiences of visitors. Biophysical carrying capacity is connected to the natural environment and describes the scale of adapting the natural environment to tourist pressures. After reaching the maximum point of carrying capacity, the environment cannot regenerate anymore, and negative environmental and other impacts become permanent. The carrying capacity concept is most efficient if integrated into the spatial planning process and tourism management of areas. Although, frequently applied, in research there have been multiple critical views of the approach (Lindberg and McCool, 1998; McCool and Lime, 2001). The reason for this is 'subjectivity' to setting the acceptable conditions, which tourism managers can set freely, or due to the calculation of the maximum allowed number of visitors which does not tell enough about the behaviour of tourists that actually causes the impacts.

In response to criticisms of carrying capacity, new approaches have been developed, e.g. the *limits of acceptable change* approach. The acceptable change approach relies on the principle of constant supervision of the activity in the area/destination and tracing established

management objectives. The approach consists of nine steps, from identifying site/destination impacts to a set of indicators, identification of alternatives, and monitoring of the destination. Examples of application of this approach relate, in particular, to natural areas (McCool, 1994; Stankey, 1984; Newall et al., 2015; Jordão et al., 2021), while in urban tourism, the method has been rarely used; one notable exception being a study into the case of Porto city centre (Jordão et al., 2021).

**Table 5.1**

Examples of qualitative and quantitative evaluations of the impact of urban tourism (summarised from various sources)

Method	Method description	Case study and key findings
Cost-benefit analysis (Dwyer, Forsyth in Spurr, 2006; Mules and Dwyer, 2005)	Identifying costs and benefits as a way of determining the impacts of tourism. Most often in relation to assessing the feasibility of an investment, e.g. when investing into new tourism infrastructure. There are two main methods, namely input-output and general equilibrium modelling.	Assessing the impact of sporting events on the economy of the selected destination.
Literature review and evaluation, compilation of statistical data and its extrapolation (Gosling, 2002)	The mixed method - a literature review and the collection and compilation of national statistics to assess the environmental impacts of travel on individual countries - addresses the following impact areas: land-use change, energy use and related impacts, exchange of biota across geographical barriers, spread of disease, psychological consequences of travel, and changes in perception of the environment.	Global level (the result is the identification of areas to which development tourism contributes. The population of developing countries is more affected by the negative impacts).
Ecosystem services valuation method, Habitat Quality Index, Habitat Quality Assessment model (Peng et al., 2021)	The analysis of dynamic changes in habitat quality 2007-2017 presents a comprehensive method for evaluating impacts, based on the assessment of ecosystem services, the Habitat Quality Index (HQI) and the Normalised Difference Vegetation Index (NDVI), the Habitat Quality Assessment Model (HQAM) and the spatial analysis method.	Huangshan, Anhui Province, China - a typical tourist city (lower habitat quality limited to urban areas, with the poorest quality near the city centre - this is the result of parallel development of tourism and urban areas).
Quantitative data compilation, risk mapping, interview (Martins et al., 2021)	Mixed method comprising of literature review, analysis of locally available data and reports, risk mapping and fieldwork - interviews with local residents and tourists on perceptions of risk of impacts on cultural heritage and loss of identity.	Lisbon city centre, Portugal (built tangible and intangible cultural heritage, identification of the vulnerability factors of cultural heritage in relation to natural hazards and those caused by man or tourists).
Life Cycle Assessment method (Qi idr., 2019)	A modified lifetime assessment method was applied to Life Cycle Assessment (LCA) in urban areas to assess the environmental impacts of rapid economic and urban development and to evaluate the effectiveness of method. It was adapted to the characteristics of the region and the urban area. Land use functions were revised on the basis of the existing LCA, an inventory analysis and impact assessment were carried out, and an interpretation of land use function was prepared.	Dalian city, China (environmental impacts increase over time; most impacts are caused by industry).
Hotspot identification and visualisation (Valls in Roca, 2021)	The study method is based on the identification and visualisation of hot spots of visitor activity using more than one million geo-referenced public images (images obtained from Flickr). The method is designed to be generalised/adapted to different urban environments, reducing the cost of implementation and capturing the behaviour of a larger number of people. The most important result was a graphical representation that serves as a tool in the conversation with stakeholders.	Barcelona, Spain (visualisation of tourist flows as input for stakeholder interviews).
Case studies, interviews, focus groups (Koens in Postma Papp, 2018)	The qualitative research on the effects of overtourism was carried out by surveying 13 European countries and 80 stakeholders. The methodology covers two research projects. The first involves well-known urban destinations experiencing the effects of overtourism, while the second project involves smaller cities with less developed tourism. The focus was on the perception and management of overtourism and the causes triggering it. This was followed by interviews with 150 residents in the first six cities and workshops with stakeholders to address previously unanswered questions.	First project: Amsterdam, Barcelona, Berlin, Copenhagen, Lisbon and Munich. Second project: Antwerp, Bruges, Ghent, Leuven, Mechelen, Salzburg and Tallinn (effects of overtourism in cities are complex but cannot be explained by tourism growth alone).

SWOT - Analysis of strengths, weaknesses, opportunity and threats (Galdini, 2007)	Using SWOT analysis to identify the strengths, weaknesses, opportunities and threats tourism brings to destinations, the economy and society. At the same time we can analyse as well strategic conditions that can contribute to the revitalisation of cities through tourism policies. The aim is to examine the main economic weaknesses and strengths associated with tourism development.	Genoa, Italy (need to balance the advantages and disadvantages of tourism development in cities and the interplay between the different aspects of tourism development - economic, time, spatial components).
Regression (Yang in Fik, 2014)	The method assesses two types of spatial effects in regional tourism growth: spatial spill-over and spatial heterogeneity. To this end, spatial growth regression estimation is used to model regional tourism growth and to identify the economic and spatial factors explaining the variability of tourism growth using the case of 342 cities in China. The analysis identifies several important factors, including local economic growth, the localisation of the economy, tourism resources, hotel infrastructure, as well as spatial spillovers related to tourism resources and hotel infrastructure.	342 cities in China (local economic growth has been identified as the most important factor in the variation of tourism growth, as it influences the growth of domestic and foreign tourism).
The concept of carrying capacity (ESPON, 2020)	The approach consists of five steps: 1. A general overview of the destination, carried out through different impact measurement approaches, a review of strategies and policies, and interviews. 2. Identification of accidental loops between tourism and the spatial context, through the identification of key spatial 3. Measurement of the tourism flow of a destination through data collection, estimations and forecasts of tourism flow. 4. identification of tourism impacts. The key here is to combine tourism and spatial indicators into tourism impacts and to interpret these impacts. 5. Identification of carrying capacity in the context of the workshop, drawing conclusions and recommendations which, together with the previous steps, provide a final assessment of carrying capacity.	Nova Gorica, Slovenia.

The literature review and Table 5.1 point to individual approaches that can be used to assess urban tourism impacts; they are often not comprehensive (Sans and Quagliari, 2016). As several authors note, such an approach is partial, since tourism manifests itself as a multidimensional and complex problem (Koens, Postma and Papp, 2018). Furthermore, compared to natural attractions such as national parks, we also encounter - in the case of cities - the challenge of distinguishing the impacts of tourist activities from the impacts of other activities in the (given) city. This can be illustrated in the case of urban regeneration projects, implemented in the cities mainly to improve the quality of urban space, yet later appear to become an important tourist attraction as well (Galdini, 2007).

When assessing the impacts of tourism on the city, we must pay particular attention to the view of the resident populations. Several authors have pointed this out: Alam and Paramati (2016), Haley, Snaith and Miller (2005), Strickland - Munro, Allison and Moore (2010), as they believe residents are a key factor in the development and existence of life in the city. They are also aware of this in Ljubljana, as Tourism Ljubljana carries out an annual survey questionnaire 'Attitudes of the locals towards tourism' to check the impacts of tourism on life in the city as a whole and, specifically, in the city centre as the most exposed urban area (Oseli and Podlogar, 2017; Lizard and North, 2018; Ninamedia, 2019). Despite the annual repetition of the survey, the results are not entirely comparable, as the questionnaire varies from year to year.

An introductory overview of the approaches to impact assessments of urban tourism can be concluded with the following findings: the as-

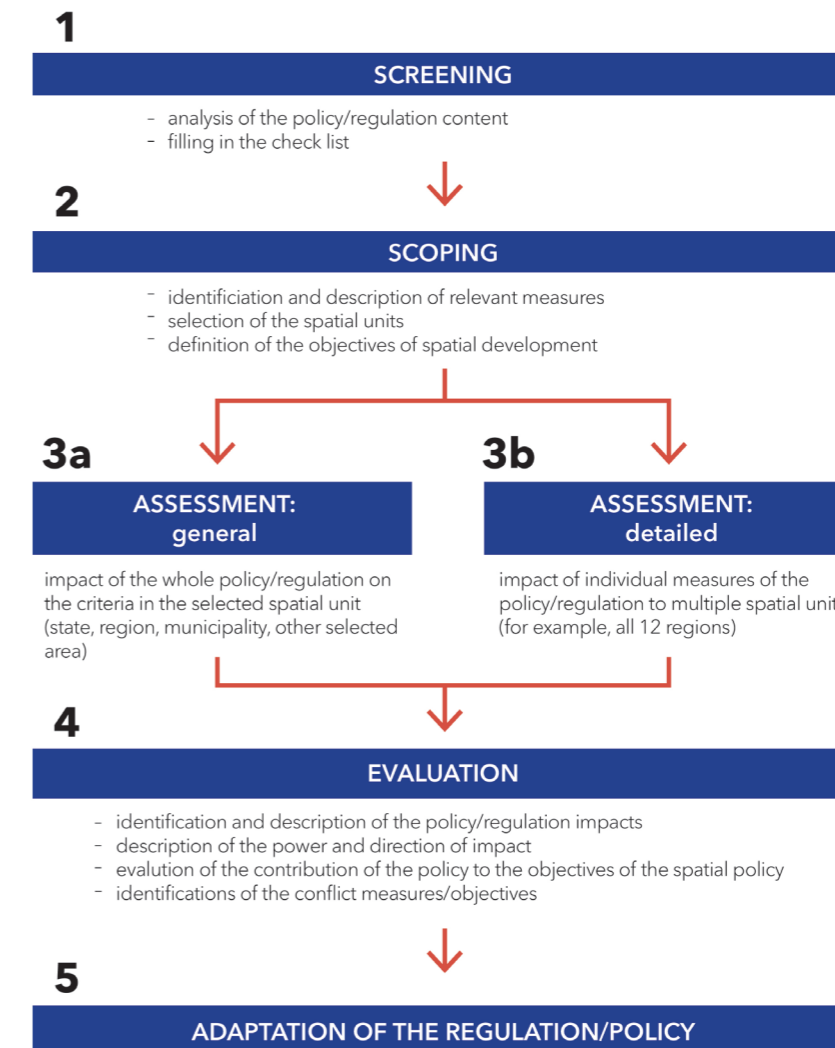
assessment of tourism impacts in cities differs from such assessments in natural areas. For now, we do not have a single approach that can be applied to best measure the content and complexity of these impacts. In order to fill this gap, this chapter presents a method of Territorial Impact Assessment (TIA). TIA has been selected as an appropriate method to provide a comprehensive picture of the impacts of urban tourism on the economy, society, environment and space and territorial governance of selected area. The implementation of a TIA is most often participatory and demands the involvement of different stakeholders (Fischer et al., 2015). This approach is presented in the second subchapter, first through a description of the methodology, and then through a presentation of the results and a description of the methodology adapted to the needs of the MESTUR project. In the conclusion we comment on the usefulness of Territorial Impact Assessments for evaluating the impacts of urban tourism.

### 5.2 Territorial Impact Assessment as approach to measure impacts

Territorial Impact Assessment is a tool for the strategic assessment of policies, developed at the initiative of the European Commission under the ESPON programme at the beginning of 21<sup>st</sup> century. The European spatial development perspectives (ESDP) emphasised balanced and sustainable development, and expressed the need for more territorially specific policies which would address economic, social, environmental and cultural aspects of sustainability. Here, the big emphasis was on impacts, which European policies have in the fields of transport, energy and the environment. At the same time, there has been a focus on strengthening the involvement and integration of local and regional stakeholders in policy development and implementation. The initial aim of the TIA was to discover the extent to which the policy/legislation in preparation would contribute to achieving the goal of territorial cohesion, and was rooted in the idea that people should not be deprived because of where they lived (CEC, 2004; 2008). First viewed, the approach resembles the well established strategic environmental impact assessments or sustainability impact assessments which some of European countries (Great Britain, Switzerland) have used to check if their policies contribute to the global goals of sustainability (Marot, Kostanjšek and Krošelj, 2022). It should be emphasized that assessments should be used to show that policies and regulation impacts also include a spatial dimension.

A territorial impact is an impact on the territory, the territorial governance, society, or environment in the selected territorial unit which arises as a result of a policy (Fischer et al., 2015, Marot et al., 2021). This is a very broad definition of impact which aims to highlight that the characteristics of space - more specifically of cities and regions - vary and thus affect people's access to economic and social opportunities, and their quality of life (Davoudi, 2005). TIA is a method of assessing and identi-

fying spatial impacts in selected spatial units at national, regional, and local levels. The method can be carried out before, during, or after the implementation of a policy or regulation. TIA distinguishes between quantitative approaches involving computer-based macroeconomic models; qualitative approaches, where the main concern is user-friendliness, in this case for officials, participatory approaches to assessment (involving stakeholders); and mixed methodological approaches. The choice of approach depends on the time and financial framework, the administrative level at which the assessment is to be carried out, the spatial context, and the experience and knowledge of the expert. The content of a particular assessment depends on the policies and measures that the policy is implementing, the capacity of the institutional framework to apply the policies, the spatial units in which the impact is expected to occur, and the potential impacts and their magnitude (Marot et al. 2021). In most cases, existing statistical data is used for the assessment. According to published studies and literature, TIA has not yet been carried out with regard to tourism.



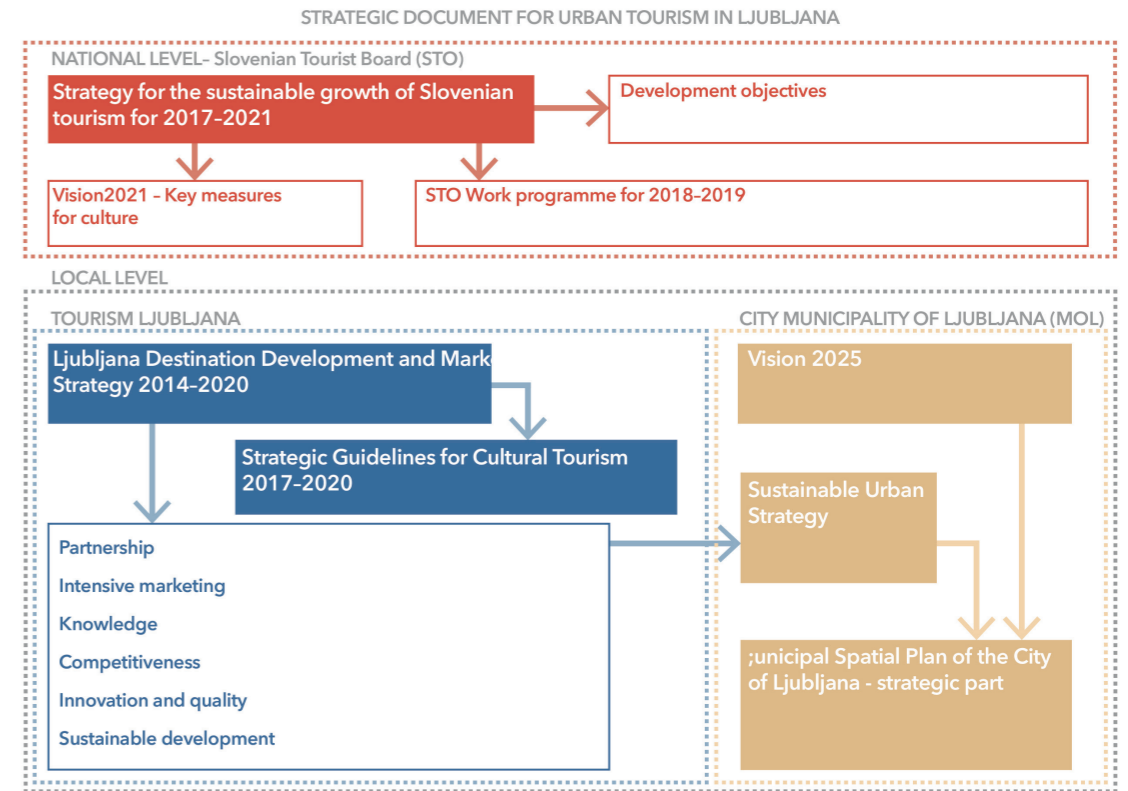
**Figure 5.1**  
Steps of the Territorial Impact Assessment procedure (Author: Manca Krošelj, based on Golobič and Marot, 2011)

For the purpose of assessing the impacts of urban tourism growth in Ljubljana and Maribor, we followed the TIA approach developed in the ESPON EATIA project (Fischer et al., 2012; Marot, Kolarič and Golobič, 2013). As shown in Figure 5.1, it consists of four steps (screening - identification of the need for assessment, scoping, assessment, and evaluation). For the purpose of assessing the growth of urban tourism we adapted the approach in the evaluation phase. The steps of the assessment were as follows:

- **Steps 1 and 2:** Screening and scoping: for each city we identified the main policies in the field of tourism and spatial development and mapped their objectives and measures in the form of a logical chain (see Figure 5.2). In a workshop format, we carried out a brainstorming exercise on the potential impacts of tourism growth on the selected cities, (two workshops were separately organised for Ljubljana and Maribor). The workshop participants first wrote down all possible impacts, evaluated the direction of the impacts (positive/negative), and then reported and confronted their findings in a discussion. The resulting very broad list of impacts served as the basis for the numerical impact assessment.

- **Step 3:** Assessment: based on the qualitatively identified impacts, we searched for quantitative data in various publicly accessible databases. Some of the data, e.g. about crime rates, had to be requested separately, with varying degrees of success. In total, data was extracted from more than 10 sources (SI-STAT, police, student work providers, municipalities, Surveying and Mapping Authority of the Republic of Slovenia, Fraport, Ljubljana bus station, internet archives); in total, data was extracted for 78 indicators. The set of indicators differed for the two cities, as the City Municipality of Maribor provided us with data concerning the use of municipal public spaces for tourism, while the City Municipality of Ljubljana did not. Based on the data obtained for 2014 and 2019, we were able to assess the trends and magnitude of tourism growth, as well as the quantity of its effects. These impacts were then assessed by the project's expert group with regards to their direction (positive and negative) and the strength of the impact (2 - large, 1 - small, 0 - no impact). The assessment was first carried out individually, and then conflicting assessments were discussed with a common assessment of each impact being subsequently agreed upon.

- **Step 4:** Evaluation: this was done by asking whether we thought that the individual numerical effects were due to the growth of tourism or whether we thought that other factors were also influencing it. The evaluation was carried out using the following rating scale: 3 - the impact occurs to a greater extent due to the growth of urban tourism; 2 - the impact is to a lesser extent due to the growth of urban tourism; 1 - the impact is not due to the growth of urban tourism; 0 - I cannot evaluate. The evaluation was also carried out by each individual expert; the scores were averaged and, in the face of conflicting opinions were, if possible, agreed upon via debate and discussion.



**Figure 5.2**  
Example of a logic chain for strategic documents steering tourism development in Ljubljana (Author: David Klepej)

The workshops related to steps 1 and 2 of the impact assessment were held separately, first in Ljubljana (December 2019) and then in Maribor (January 2020). In Ljubljana, in addition to the project team (seven members), the workshop was attended by six participants from the tourism and spatial planning sector. In Maribor, in addition to the four members of the project team, the workshop was attended by seven participants from the tourism and spatial planning sector. Both workshops were focused upon qualitative impact assessment. In the first part, we presented the main project starting points and then introduced the participants to the strategic documents and policies guiding tourism development in both cities. After the introductory presentation, individual identification of potential impacts of urban tourism followed. The participants classified the written impacts into spatial and environment, economic, social, and territorial governance thematic fields and evaluated them according to whether they were positive (very positive impact, positive impact), negative (very negative impact, negative impact) and positive or negative impacts. In addition to the evaluation and grouping of impacts, the frequency of their occurrence was also considered, as can be seen from the tables in subsection 5.3.1.

The second workshop focused on providing a quantitative assessment of impacts. An assessment matrix was provided to the participants of the first workshop; eight responded. We then presented the results of the individual evaluation, including the discrepant scores, at the work-



shop and tried to reconcile them in a discussion. The second workshop was attended by 10 participants in addition to the project team (seven members). The discussion was held in three groups - two in Ljubljana and one in Maribor.

### 5.3 Results of the Territorial Impact Assessment - measured urban tourism impacts before the pandemic

#### 5.3.1 Qualitative assessment based on brainstorming exercise

In the first results subsection, we present the results of the qualitative assessment. In Ljubljana (Table 5.2), the highest impacts were found in the areas of the economy, space, and the environment. The main identified negative impacts were: the cost of living for the city's residents, rising property prices (due to private accommodation being rented out to tourists), traffic congestion around the city, the high density of people and the associated excessive tourist flow in some parts of the city, a lack of space for public services, and environmental pollution (Stubičar and Marot, 2019). In Maribor (Table 5.3), where the positive economic and social impacts stood out, the negative ones included the pressures of car traffic and how it crowds out other users and increases the need for parking spaces at tourist hotspot areas, the lack of a bicycle rental system, and problems with implementing strategic documents (Stubičar and Marot, 2020).

Positive impacts in Ljubljana include seasonally unlimited new jobs for residents, increased earning potential, the improved purchasing power of residents, higher incomes, investment in infrastructure development, renovation of residential buildings and improvements to the city centre, and green areas closed to traffic. Participants from Maribor added to this list an increase in the number of accommodation providers and cultural and sporting events, a more educated tourism workforce, and the internationalisation of the local population, as well as improvements to cultural and other services.

In the workshops, we found that defining and assessing impacts requires knowledge of their nature. Impacts are interdependent, intertwined, and can act as a cause or a consequence of other impacts. A difficulty arose in categorising and evaluating impacts, as one impact may occur within different thematic categories (rising property prices may be an economic or a spatial impact), and these differences in categorisation are linked to the perspectives of the individual participants. Management impacts were the most difficult to identify, as participants tended to highlight problems and the changes needed in tourism operations rather than the actual governance impact of tourism. In this respect, they stressed the variability of strategic documents and policies that dictate the development of tourism and, consequently, its impacts.

**Next page:  
Table 5.2**

Overview of the identified economic, spatial-environmental, social and governance impacts of tourism in Ljubljana (Source: Stubičar and Marot, 2019, pp. 3-6)

Positive	Negative
<b>Economic impacts</b>	
<ul style="list-style-type: none"> <li>+ new employment for locals, including in low season (5 x)</li> <li>+ earning potential and improved purchasing power for residents (3 x)</li> <li>+ higher incomes, more money to invest in development, infrastructure, renovation of residential buildings (3 x)</li> <li>+ multiplier effect of tourism (2 x)</li> <li>+ better promotion and valorisation of the cultural offer</li> <li>+ greater diversity of services offered in the area of tourism cities</li> </ul>	<ul style="list-style-type: none"> <li>- more expensive life for city residents, e.g. higher cost of services, municipal infrastructure (4 x)</li> <li>- property price increasing due to renting (4 x)</li> <li>- shortage of shops to provide basic needs</li> <li>- Airbnb problem</li> <li>- Increased costs for population mobility</li> <li>- grey economy</li> <li>- poor airport connectivity</li> </ul>
<b>Environmental and spatial impacts</b>	
<ul style="list-style-type: none"> <li>+ closed and improved city centre, improved public space, more green spaces and new urban infrastructure (6 x)*</li> <li>+ distribution of tourism capacities in the area (limit in the city centre, stimulate in the wider area and hinterland) (2 x)</li> <li>+ better physical accessibility for disadvantaged groups</li> <li>+ construction of hotels and accommodation</li> <li>+ cleaner Ljubljana</li> <li>+ better mobility - creation of inter-regional transfers and bus services</li> <li>+ development of new activities in the city</li> </ul>	<ul style="list-style-type: none"> <li>- traffic congestion inside and outside the city (longer travel times, tourists and commuters) (6 x)**</li> <li>- environmental pollution (CO2 emissions, litter, noise pollution) (3 x)</li> <li>- congestion and overcrowding in certain areas of the city (centre) due to tourist flow, but not in other areas (3 x)</li> <li>- lack of parking spaces (2 x)</li> <li>- lack, reduction of pedestrian areas (sidewalks occupied by tables), poorer accessibility (with wheelchairs, cyclists, disabled) (2 x)</li> <li>- lack of space for public services - tourism is displacing other functions of the city, lack of basic care services for the local population (2 x)</li> <li>- gentrification of the central part of the city (3 x)</li> <li>- deterioration of the visual appearance of the city centre (souvenir shops, signs, poorer quality of architecture) (3 x)</li> <li>- conflicts between different groups of users</li> </ul>
<b>Social impacts</b>	
<ul style="list-style-type: none"> <li>+ openness, diversity of society, new cultural exchanges and broadening of the horizons of the local population (6 x)</li> <li>+ more offer (gastronomy, additional tourist products, cultural offer) and better quality of life (2 x)</li> <li>+ difference in contact with the destination between agency and individual guests (the latter more in contact with the destination)</li> <li>+ Ljubljana is a preferred destination for safety reasons</li> <li>+ immigration of young people to the city (creative industries)</li> </ul>	<ul style="list-style-type: none"> <li>- more popular poses the risk of more genericity (less cultural diversity) (3 x)</li> <li>- higher incidence of pickpocketing and organised crime (2 x)</li> <li>- possible social conflicts</li> <li>- less housing for residents</li> <li>- more precarious work in the service sector</li> <li>- reduction in the use of the Slovene language in the public space</li> <li>- poor image of tourism workers in society</li> <li>- emigration of the lower classes (increasing class differences)</li> <li>- negative attitudes of Ljubljana's residents towards tourism (poor promotion, media influence)</li> </ul>
<b>Territorial governance impacts</b>	
<ul style="list-style-type: none"> <li>+ information boards in English (to tourist attractions, LPP); destination recognition and networking (2 x)**</li> <li>+ easier decision-making due to centralisation</li> <li>+ Increase in revenue for national and local budgets allows for increased investment</li> <li>+ upgrading of strategic orientations in the field of tourism (MOL umbrella strategy + Ljubljana Tourism, a plan for sustainable tourism)</li> </ul>	<ul style="list-style-type: none"> <li>- poor public transport infrastructure (traffic regulated only in the centre, other parts problematic) (2 x)</li> <li>- inadequate regulation of property rental, e.g. regulate short-term rentals through taxes rather than limiting the right to ownership, consents (2 x)</li> <li>- the question of the appropriateness of the approach to branding and marketing heritage, landscape and the image of the city (2 x)</li> <li>- lack of positive promotion of tourism as a sector</li> <li>- offer limited to narrower parts of Ljubljana (mainly Centre, Trnovo)</li> <li>- development should take into account that Ljubljana is also a city for locals, not only for tourists (negative in the long term, tourists do not come to see tourists)</li> <li>- management does not take enough account of the target groups of tourists, not enough alternative tourist offer</li> <li>- inadequate regulation of movement around the city, problem for cyclists and pedestrians (tourists)</li> <li>- absence of strategic spatial orientations for tourism in spatial planning documents and of joint action and linkages between sectors</li> </ul>

Positive	Negative
<b>Economic impacts</b>	
<ul style="list-style-type: none"> <li>+ new employment for local people and young people (5 x)</li> <li>+ increase in the amount of the tourist tax as an inflow to the budget of the Municipality of Maribor (4 x)</li> <li>+ increase in the number of accommodation providers (3 x)</li> <li>+ cultural and sport events (as tourist offer) (2 x)</li> <li>+ expansion of the tourist offer</li> <li>+ promotion of consumption of local resources and products</li> <li>+ revitalisation of the town centre</li> <li>+ increase in revenue, economic effects of the European title European Capital of Culture, Lent Festival</li> </ul>	<ul style="list-style-type: none"> <li>- low added value</li> <li>- higher prices for services (shops, etc.)</li> <li>- the touristification of urban districts, especially the city centre</li> <li>- lower impact due to delayed information</li> </ul>
<b>Environmental and spatial impacts</b>	
<ul style="list-style-type: none"> <li>+ urban regeneration, degraded areas and abandoned buildings (6 x)</li> <li>+ improvement and renovation of urban areas (4 x)</li> <li>+ redevelopment of event spaces by location</li> <li>+ better transport connections</li> <li>+ Protection of natural and cultural heritage</li> </ul>	<ul style="list-style-type: none"> <li>- pressure from car traffic, especially in the city centre (4 x)</li> <li>- increased need for parking spaces (2 x)</li> <li>- inadequate development of infrastructure in certain areas of the city</li> <li>- air pollution and increased noise pollution in the city</li> <li>- abandoned city centre at weekends and holidays</li> </ul>
<b>Social impacts</b>	
<ul style="list-style-type: none"> <li>+ internationalisation of the local population (5 x)</li> <li>+ improved living standards and conditions for residents; and expansion of activities (3 x)</li> <li>+ creation of new employment (2 x)</li> <li>+ increase in the recognition of the city (2 times)</li> <li>+ marketing and promotion of small stories (2 x)</li> <li>+ increase the diversity of the offer (2 x)</li> <li>+ enhanced pride of the city's inhabitants</li> <li>+ more activities promoting healthy lifestyles</li> </ul>	<ul style="list-style-type: none"> <li>- gentrification of the city centre and other areas (3 x)</li> <li>- the impact of Airbnb on the character of neighbourhoods and the social life of residents</li> <li>- the emergence of conflicts between residents and tourist offerings (parking, noise, opening hours)</li> </ul>
<b>Territorial governance impacts</b>	
<ul style="list-style-type: none"> <li>+ new, educated tourism professionals (2 x)</li> <li>+ the need to develop a tourism strategy as an umbrella, targeted document</li> <li>+ regulation and coordination of public transport and tourism needs</li> <li>+ closure of the city</li> <li>+ integration of institutions and local population</li> <li>+ recognising Maribor and networking with other municipalities</li> <li>+ introduction of the Maister mini-vehicle</li> <li>+ link to the Smart city Maribor initiative</li> </ul>	<ul style="list-style-type: none"> <li>- poor transport regulation at regional and city level (3 x)</li> <li>- difficulties in implementing strategic documents (2 x)</li> <li>- providing alternative accommodation options</li> <li>- less efficient work of tourism and related organisations</li> <li>- directing the land use and investment for tourism purposes</li> </ul>

**Table 5.3**

Overview of the identified economic, spatial-environmental, social and governance impacts of tourism in Maribor (Source: Stubičar and Marot, 2020, pp. 4–7)

### 5.3.2 Quantitative assessment

The quantitative evaluation also assessed impacts in four thematic areas: society, economy, environment and space, and governance. Each impact was described by an indicator, for which values were available for 2014 and 2019, as well as an index of change for 2019/2014<sup>1</sup>. A numerical rating was given on a scale of: 2 - very positive impact; 1 - positive impact; 0 - both positive and negative impact; -1 negative impact; -2 very negative impact; 3 - no impact.

Overall, the impacts were rated positively. In Ljubljana (see Tables 5.4 to 5.7), the scores were very positive (+2), very positive/positive (+1/+2) and positive (+1), and social impacts predominated. These were related to an increase in the number of foreign tourists, students and exchanges, an increase in international influence and high levels of security, and a decrease in thefts. The economic impacts highlighted were the employability of the population and the increases in their income. For the environmental and spatial area, the predominant impacts were related to increasing accommodation capacity, reducing emissions, and increasing the number of users of the bicycle rental system. With regards to issues of management, the increase in the tourist tax was seen as an example of a more sustainable tourism policy. The strengthening of strategic planning and the increase in the number of festivals and events, and the creation of more international rail transport links, also contribute to more sustainable tourism. In Maribor (Tables 5.8 to 5.11), positive social impacts included an increase in the number of educated staff in the tourism sector. In the economic and business fields, similar effects were highlighted as in Ljubljana, while no positive effects were mentioned in the environmental and spatial fields.

#### Ljubljana

Among the social impacts in Ljubljana (Table 5.4), a majority of responses were rated as very positive (+2) or positive (+1), while for some indicators no impact was found. The very positive impacts were mainly related to an increase in the number of tourists or students, as shown by the 2019/2014 index. An increase of just over 100% was recorded for the effect of an increase in the number of tourists from other continents, while an increase of around 80% was recorded for the indicators on the number of tourist arrivals and the number of foreign tourist arrivals. Among the positively rated impacts, the largest difference (18%) was seen in the increase in foreign exchange students. The social impacts, rated 3, did not show any significant variation. The positive attitudes of the population towards tourism remained unchanged: according to the data, the number of inhabitants in the city centre remained unchanged (25,729 in 2014 and 25,861 in 2019), as did the share of foreign tourists and tourists from other continents. However, the proportion of residents who considered that tourism positively contributed to their quality of life had changed or decreased (index 74), as had the number of graduates from tourism education programmes, which classifies these effects as negative.

<sup>1</sup> More detailed data for each indicator is available in the appendix entitled Table of indicators.

As with the social impacts, the economic impacts (Table 5.5) were dominated by positive impacts, with the greater number of those rated at +1. Among the very positive impacts, was an increase in the number of people employed in the tourism sector (30% growth), an increase in the value of the sector (38% growth), and an almost 5-fold change in the growth of purchases of city tourist cards (1,656 cards in 2014 and 8,494 cards in 2019). Among the positive impacts, the increase in tourist use of the housing stock indicated the largest change (57% growth), followed by increased visits to attractions (18%), and an increased share of tourism employment (13% growth), while the remaining impacts, such as the increase in managerial jobs and growth in tourism's share of GDP, indicated a change of around 5%. No negative economic impacts were detected, but there were impacts that were assessed as positive or negative, as opposed to social impacts. Among these, were the rise in museum ticket prices, a rise in prices (annual consumer price index), and a fall in purchasing power due to unobservable changes.

The environmental and spatial impacts (Table 5.6) show an almost equal number of negative and positive impacts. The average price per m<sup>2</sup> for apartments sold in the city showed a price increase of almost 40% over the five-year period, and the average price per m<sup>2</sup> for renting bar space in the city also showed a price increase of almost 20%, while the price per m<sup>2</sup> for bars sold in the city had fallen by almost 30%. In the context of mobility, there was an increase in the proportion of tourists travelling by private car (30%). These changes were assessed as negative impacts. Among the very positive effects, were an estimated an increase of almost 50% in the number of users of bicycle rental systems (750,000 users in 2014 and 1,100,000 users in 2019), as well as an increase in the number of purchase contracts concluded for apartments in the city (1,522 in 2014 and 1,759 in 2019). The number of total beds also recorded a 16% growth; in fact, over the five-year period this number increased by almost 2,000 beds, which is why the impact was assessed as positive.

The management impacts (Table 5.7) also show an almost equal distribution of positive and negative impacts. The negative effects related to the management of the economic aspects of tourism and the number of tourists, while the positive effects were more directly related to the management of Ljubljana's tourism sector. The biggest change was seen in the increase in the amount collected through the tourist tax (EUR 861,395 in 2014 and EUR 5,150,854 in 2019); perceived as a very positive effect. This category also includes increased expenditure on tourism promotion, an increase in the number of employees, and an increase in the number of inscriptions on UNESCO World Heritage Sites, which have seen an increase of up to 30%. There was also an increase in the number of certificates and awards for sustainable tourism. However, the 2.5-fold increase in the level of the tourist tax is classified as a very negative impact as it financially affected mainly tourists, while the share of the tourist tax spent on tourism development has contrary to the collected sum instead decreased (30% drop). The tourist tax was also assessed negatively due to the lack of clarity

on how the funds generated by the tax are spent and whether this spending is really targeted at tourism. The biggest change was in the share of tourists travelling by public transport, which fell by just over 50%. Among the negative effects, we found mainly mobility-related effects, with the biggest deviation being in the number of scheduled air destinations (summer and winter), which fell by 20% (19 destinations in 2014 and 16 destinations in 2019). The increase in the price of an hour of parking in the city centre showed a 10% to 20% increase in prices in parking garages and on streets.

Positive impacts (+2/+1)	Negative impacts (-2/-1)	No impact
<b>+2 VERY POSITIVE IMPACT</b> Increase in the number of tourists Increase in the number of tourists from other continents Increase in the total number of all exchanges High level of security Improvement of services in the city	-	Increasing the share of foreign tourists Change of origin of foreign tourists Change in the structure of the countries of origin of students Decrease in the population of the city centre Unchanged opinion of the residents towards the contribution of tourism to the development of the city Increase in the international recognition of the city (sister cities) Increase in interest in working in tourism
<b>+1/+2</b> Increase in the number of students' countries of origin Decrease in theft	-	-
<b>+1 POSITIVE IMPACT</b> Increase in the number of foreign tourists Change in the structure of types of tourists Increase in the number of foreign exchange students Increase in the number of modern nomads Decrease of intolerance in society Increase in the international influence of the city Increase in the international recognition of the city (Mercer)	<b>-1 NEGATIVE IMPACT</b> Decrease in satisfaction with quality of life in the city Decrease in the number of graduates of tourism education of tourism programmes	-

**Table 5.4**  
Overall assessment of social impacts for Ljubljana

Positive impacts	Positive and negative impacts	No impact
<b>+2 VERY POSITIVE IMPACT</b> Increase in the number of people employed in tourism Growth in added value of the sector Growth in purchases of tourist cards	The increase of museum ticket prices Increase of prices Decline in purchasing power	Same daily expenditure of foreign tourists
<b>+1/+2</b> Increase in income of city centre employees	-	-
<b>+1 POSITIVE IMPACT</b> Increase in the number of people employed in tourism during the main season Increase in the share of employees in tourism (of all employees) Increase in managerial positions in tourism Increase in the share of tourism (GHI sectors) in the region's GDP Increased visits to main attractions Increase in tourist use of real estate	-	-

**Table 5.5**  
Overall estimates of economic impacts for Ljubljana

Positive impacts	Negative impacts	Positive and negative impacts
<b>+2 VERY POSITIVE IMPACT</b> Increase in users of the bike rental system Increase in housing sales	-	Increase in the share of tourists travelling by plane
<b>+1/+2</b> Increase in income of employees in the city centre	<b>-1/-2</b> Average sale price per m <sup>2</sup> for apartments in city €/m <sup>2</sup> Growth in the share of JPP in the "modal split" (JPP use)	-
<b>+1 POSITIVE IMPACT</b> Reducing emissions Increase in tourism capacity (all beds) Growth in house prices Increase in prices of pubs Increase in tourism capacity (hotels and similar beds)	<b>-1 NEGATIVE IMPACT</b> Increase in the amount of waste collected Increase in the average rental price per m <sup>2</sup> for premises in the city Increase in sales of pubs Growth in the share of JPP in the "modal split" (personal car)	-

**Table 5.6**

Overall estimates of the environmental and spatial impacts for Ljubljana

Positive impacts	Negative impacts	No impact
<b>+2 VERY POSITIVE IMPACT</b> Increase in the amount of revenue collected by the tourist tax Increased expenditure on tourism promotion Sustainable orientation of tourism Increase in the number of employees at TICs and LTOs	<b>-2 VERY NEGATIVE IMPACT</b> Decrease in the share of the tourist tax spent on tourism development Increase in tourist tax Proportion of tourists travelling by public transport	Same number of new additions to the cultural heritage list
<b>+1 POSITIVE IMPACT</b> Strengthening strategic planning (existing strategy) Increase in the number of multiple days of music/ cultural festivals Increase in the number of JPP products for tourists Increase in the number of international rail connections per day New UNESCO inscriptions (applications)	<b>-1 NEGATIVE IMPACT</b> Increase in the price of an hour of parking in the city, garage house Reduction in the number of scheduled flight destinations (winter schedule) Increase in the price of an hour of parking in the centre (street) Proportion of tourists travelling by plane	-
<b>+1 POSITIVE IMPACT</b> Reducing emissions Increase in tourism capacity (all beds) Growth in house prices Increase in prices of pubs Increase in tourism capacity (hotels and similar beds)	<b>-1 NEGATIVE IMPACT</b> Increase in the amount of waste collected Increase in the average rental price per m <sup>2</sup> for premises in the city Increase in sales of pubs Growth in the share of JPP in the "modal split" (personal car)	-

**Table 5.7**

Overall estimates of impacts on territorial governance for Ljubljana

**Maribor**

The social impacts for Maribor (Table 5.8) were assessed to have a similar magnitude as that recorded in Ljubljana, i.e. there were predominantly positive scores. The increase in the number of foreign exchange students from the EU stood out as very positive and recorded the largest visible change of just over 100%. This was followed by the increase in the number of foreign tourists from other continents which recorded an increase of almost 100%, and the increase in the number of tourists and the number of foreign tourists which recorded increases

of around 60%. A positive change was also seen with regard to reductions of thefts; a drop of just over 60%. Among the positively assessed impacts, those related to the training of young people for the tourism sector stood out. The number of graduates from tourism education programmes and the number of secondary school graduates in the tourism sector increased by just over 20%. Other positive impacts, with less visible changes, were the increase in the international connectivity of cities, and the improvement of safety in the city. At the same time, the number of modern nomads had increased; a trend that was evidenced on the basis of the number of "coworking" locations in the city (four locations were detected in 2019). In contrast to Ljubljana, a decrease in the number of inhabitants was detected among the negative effects.

The economic impacts (Table 5.9) in Maribor were evaluated to be similar to those noted in Ljubljana. Positive impacts dominated. Among these impacts, growth of the sector's gross value added, with a 30% increase, and the increase in the income of residents in the city centre, with an almost 20% increase (EUR 737 in 2014 and EUR 948 in 2019), can be considered very positive. Positive effects were linked to employment and visits. The most notable of these were the increase in tourists' use of the real estate (72% growth) and the increase in the number of people employed in tourism, where a 24% growth was observed (3,811 employees in 2014 and 4,727 employees in 2019). However, foreign tourists' daily consumption had decreased over the five-year period, leading to the impact being assessed as negative for the economy. The number of employees in the high season and the growth in the share of tourism as a percentage of GDP did not have specific impacts. Opposite, the increase in museum admission prices and the annual consumer price index were assessed as positive or negative effects, as there were no major changes that impacted either tourists or residents, or the impact could be opposite depending on the target population. In the case of museum admissions, the impact of the increase was positive for museums as they raised more money, but it could also be negative if it discouraged potential visitors from coming.

The environmental and spatial (Table 5.10) impacts were perceived to have had several negative or positive effects. Among the very positive ones, were an increase in the use of space for tourism; there was an increase of just over 70% in the total public space used for hospitality services, while the total number of beds increased from 4,083 in 2014 to 6,160 in 2019. With a growth of 5%, the impacts of increased income from renting out public areas was also included among the positive impacts. The negative impacts were mainly related to mobility and the real estate market. A very negative impact was the decline in the share of tourists travelling by public transport (a drop of just over 80%), a trend that also runs contrary to efforts towards sustainable mobility; recently strongly reinforced in society. On the negative side, there were rises in the price per m<sup>2</sup> for housing sold in the city, a rise in the price per m<sup>2</sup> for business premises rented (20-30% increase), and an increase in waste collection per capita. Among the positive and negative impacts,



we identified the impacts most closely linked to the property market, due to them having the least noticeable changes. Thus, average rental prices and the price per m<sup>2</sup> for bars sold remained almost unchanged, whilst there was a 10% increase in the number of purchase contracts concluded for dwellings, (which does not have a significant impact on tourism), and a 5% decrease in the share of tourists travelling by private car.

In contrast to Ljubljana, the territorial governance impacts in Maribor (Table 5.11) were in more cases rated with a score 3; there was almost no change in them over the five-year period. Among the impacts assessed in this manner were: the strengthening of strategic planning, which, despite the tourism development strategy in place, had no specific impact on tourism; the unchanged prices for parking in carparks or on the street; the unchanged number of flight connection routes, and, accordingly, the unchanged number of flight passengers; and the lack of applications and inscriptions on UNESCO lists. There were also no differences between the positively and negatively rated impacts; including the number of international rail connections per day, and the sustainability of tourism. The increase in the number of consents for events in public spaces (66% growth) was a very positive impact. Among other positive impacts, the increase in the tourist tax from €1.01 in 2014 to €2.50 in 2019 stood out as it evidenced how more funds were collected for tourism, as well as the number of building permits for tourist facilities (13% growth). The impact of the number of new building permits is positive as it is evidence of new investments in infrastructure.

Positive impacts	Negative impacts	Positive and negative impacts
<b>+2 VERY POSITIVE IMPACT</b> Increase in the number of foreign tourists Increase in the number of tourists from other continents Increase in countries of origin of foreign exchange students Decrease in thefts Increase in the number of tourists Increase in the share of foreign tourists from other continents	-	Increasing the share of foreign tourists Change in the structure of types of tourists
<b>+1 POSITIVE IMPACT</b> Increase in the number of foreign exchange students Change in the structure of countries from which students are on exchange Increase in the number of modern nomads High level of safety Increase in interest in working in tourism Increase in the share of tourism graduates Increase in the number of secondary school graduates from tourism Increase in the international recognition of the city (more sister cities) Change in the origin of foreign tourists	<b>-1 NEGATIVE EFFECT</b> Population decline in city centre	-

**Table 5.8**

Overall assessment of social impacts for Maribor

Positive impacts	Negative impacts	Pos. and neg. impacts	No impact
<b>+2 VERY POSITIVE IMPACT</b> Increase in the number of foreign tourists Increase in the number of tourists from other continents Increase in countries of origin of foreign exchange students Reduction in thefts Increase in the number of tourists Increase in the share of foreign tourists from other continents	-	Increase in museum ticket prices Rise in consumer price index Increase in the number of people employed in tourism during the main season Increase in the share of employees in tourism	Increase in the number of employees in tourism in the main season Increase in the share of employees in tourism Growth in the share of tourism in GDP (regions)
<b>+1/+2</b> Growth in gross value added of the sector Increase in income of residents in the city centre	-	-	-
<b>+1 POSITIVE IMPACT</b> Increase in the number of people employed in tourism Increased visits to the main attractions (Old Vine) Increase in employment in management positions in tourism Decrease in purchasing power Increase in tourist use of real estate	<b>-1 NEGATIVE IMPACT</b> Decrease in daily expenditure of foreign tourists	-	-

**Table 5.9**

Overall assessment of the economic impacts for Maribor

Positive impacts	Negative impacts	Pos. and neg. impacts	No impact
<b>+2 VERY POSITIVE IMPACT</b> Increased use of space for tourism Increase in tourism accommodation capacities	<b>-2 VERY NEGATIVE IMPACT</b> Decrease in the share of tourists travelling by public transport	Share of tourists travelling by plane Growth in house prices Increase in housing sales Increase in prices of real estate for business (sales) Growth in the share of JPP in "modal split"	No growth in sales of real estate for business
<b>+1 POSITIVE IMPACT</b> Increased income from the rental of public spaces	<b>-1 NEGATIVE IMPACT</b> Growth in the amount of collected waste Average price of sold m <sup>2</sup> for apartments in the city €/m <sup>2</sup> Price growth of business premises (rental)	-	-

**Table 5.10**

Overall assessment of the environmental and spatial impacts for Maribor

Positive impacts	Pos. and neg. impacts	No impact
<b>+2 VERY POSITIVE IMPACT</b> More events in public spaces (more consents)	Increasing the number of international rail connections per day Sustainable orientation of tourism	Strengthening strategic planning No new UNESCO listings No new UNESCO applications Same price per parking hour in the city (street) Same price per parking hour in the city (garage) Increase in the number of scheduled flight destinations (flights, winter) Increase in the number of air passengers
<b>+1 POSITIVE IMPACT</b> Construction of new tourist facilities	-	-

**Table 5.11**

Overall assessment of the territorial governance impacts for Maribor

### 5.3.3 Evaluation of impacts

The final step in the Territorial Impact Assessment was to evaluate the causes of the identified impacts. We were interested in the extent to which individual impacts were caused by the growth of urban tourism. This was evaluated with four possible scores: 3 - largely due to the growth of urban tourism; 2 - to a lesser extent due to the growth of urban tourism; 1 - not due to urban tourism; or 0 - cannot evaluate the impact. A score of three was given if an impact was mainly due to tourism development alone and not the other factors. A rating of two was given if a single impact depended on several factors, and tourism development was only one of them. Tables 5.12-5.15 summarise the results of the evaluation of impacts in Ljubljana and Maribor according to four main categories of impacts: social, economic, environmental-spatial and territorial governance impacts.

Urban tourism as a cause	Ljubljana	Maribor
3 - largely due to growth in urban tourism	<p>Increase in the number of tourists</p> <p>Increase in the number of foreign tourists</p> <p>Increase in the number of foreign tourists from other continents</p> <p>Increase in satisfaction with life in the city</p> <p>Improvement of services in the city</p>	<p>Increase in the number of tourists</p> <p>Increase in the number of foreign tourists</p> <p>Increase in the number of foreign tourists from other continents</p> <p>Increase in the share of foreign tourists from other continents</p> <p>Change in the structure of types of tourists</p> <p>Increase in interest in working in tourism (number of graduates in tourism programmes)</p>
2 - to a lesser extent due to the growth of urban tourism	<p>Increase in the share of foreign tourists (arrivals)</p> <p>Increase in the share of foreign tourists from other continents</p> <p>Increase in native exchange students</p> <p>Change in the structure of countries of origin of students</p> <p>Increase in the number of modern nomads</p> <p>Positive attitude of the population towards tourism</p> <p>Decrease in the number of inhabitants in the city centre</p> <p>Increase in interest in working in tourism (share of graduates)</p> <p>Increase in the international recognition of the city</p>	<p>Increase in the share of foreign tourists (arrivals)</p> <p>Change in origin of foreign tourists</p> <p>Increase in origin of exchange students</p> <p>Change in the structure of countries of origin students</p> <p>Increase in the number of modern nomads</p> <p>Decrease in the number of inhabitants in the city centre</p> <p>Increase in interest in working in tourism (share of of tourism graduates)</p> <p>Increase in interest in working in tourism (number of secondary school graduates who have completed secondary education)</p>
1 - not a consequence of urban tourism	<p>Change of origin of foreign tourists</p> <p>Change in the structure of types of tourists</p> <p>Increase in foreign exchange students (Erasmus)</p> <p>Increase in foreign exchange students (all)</p> <p>Increase in thefts</p> <p>High level of security compared to other destinations</p> <p>Increase in intolerance in society</p> <p>Increase in interest in working in tourism (number of graduates of tourism education programmes)</p> <p>Increase in the city's international connectivity</p> <p>Increase in the international influence of the city</p>	<p>Increase in foreign exchange students (Erasmus)</p> <p>Increase in thefts</p> <p>High level of security compared to other destinations</p> <p>Increase in the international connectivity of the city</p>

Table 5.12

Evaluation of social impacts for Ljubljana and Maribor in relation to the growth of urban tourism as a development objective

The evaluation of social impacts as a result of the growth of urban tourism (Table 5.12) showed that the growth had had the largest direct impact on the absolute growth of tourist arrivals, the arrivals of foreign tourists, the number of foreign tourists from other continents, and in Maribor also on the increase in tourism jobs. Ljubljana and Maribor had the highest

similar impacts, with a score of 2, indicating that the impact is to a lesser extent a consequence of the growth in urban tourism. The score of 2 is based on the fact that, although the Erasmus programme is educational and not originally linked to tourism, more contracts for international exchanges have been signed and attract students for higher number of origin countries. The most obvious differences were with regards to the increase in the number of foreign exchange students via Erasmus programme, with Ljubljana registering only a 13% growth, while Maribor a little over 100%, and in the number of "coworking" spaces dedicated to modern nomads. Over the five-year period, the number of coworking spaces increased significantly in both cities, most notably in Ljubljana, where 9 coworking spaces were detected in 2019, while only 4 coworking spaces were detected in Maribor in the same year. Again, a score of 2 - was given, as the new age nomads are also influenced by the labour market and the labour regulation by their employee. For the impacts rated 1 - not due to the growth of urban tourism; the largest change not due to the growth of urban tourism were a decrease in the number of thefts, with both cities experiencing a decrease of around 60%. However, in terms of the increase in the number of Erasmus exchange students, Ljubljana saw an 18% increase, while Maribor only saw a 4% increase. Among the effects that were largely due to the growth in city tourism (rated 3), the increase in the number of foreign tourists from other continents stood out, with both cities perceiving a change of between 80% and 110%, while Ljubljana and Maribor perceived an increase of 80% and 60% respectively in the increase in the number of tourists and the number of foreign tourists.

Table 5.13

Evaluation of the growth in economic impacts for Ljubljana and Maribor in relation to the growth of urban tourism as a development objective

Urban tourism as a cause	Ljubljana	Maribor
3 - largely due to growth in urban tourism	<p>Increasing the number of people employed in tourism</p> <p>Increase in the share of employees in tourism</p> <p>Growth in gross value added of the activity</p> <p>Increased visits to the main attractions</p> <p>Growth in purchases of city tourist cards</p> <p>Increase in tourist use of the real estate (number of advertisements)</p> <p>Increase in tourist use of the real estate (share of of advertised apartments)</p> <p>Increase in tourist use of real estate (share of advertised real estate rented out in total)</p>	<p>Increasing the number of people working in tourism</p> <p>Increase in seasonal and precarious work in tourism</p> <p>Growth in gross value added of the activity</p> <p>Increase in museum ticket prices</p> <p>Increase in tourist use of the real estate (number of active advertisements)</p> <p>Increase in tourist use of real estate (% of apartments advertised for more than three months)</p> <p>Increase in tourist use of real estate (% of real estate stock advertised rented out in total)</p> <p>Increase in tourist use of the real estate (% of apartments occupied for more than three months)</p>
2 - to a lesser extent due to the growth of urban tourism	<p>Increase in the number of people employed in tourism in main season</p> <p>Increase in tourism management positions</p> <p>Increase in the share of tourism in the GDP of the city (region)</p> <p>Increase in tourism use of the real estate (share of apartments advertised for more than three months)</p>	<p>Increase in the number of people employed in tourism in high season</p> <p>Increase in management positions in tourism</p> <p>Increase in the share of tourism in the GDP of the city (region)</p> <p>Growth in daily consumption</p> <p>Increased visits to major attractions</p> <p>Decline in purchasing power</p>
1 - not a consequence of urban tourism	<p>Increase in seasonal and precarious work in tourism</p> <p>Increase in income of city centre residents</p> <p>Growth in daily consumption</p> <p>Increase of museum ticket prices</p> <p>Increase of prices</p> <p>Decline in purchasing power</p>	<p>Increasing the share of employees in tourism</p> <p>Increase in seasonal and precarious work in tourism</p> <p>Increase in income of residents living in the city centre</p>
0 - impact cannot be assessed		Increase of prices

The economic impacts (Table 5.13) were most similar between the cities in the score 3 category - the impact was largely driven by growth in urban tourism, with the highest changes being in the number of people employed in tourism, and the growth in the gross value added due to tourism activity. The first impact in Ljubljana had a 30% growth rate, while in Maribor it was 24%, and the index of the second impact differed more in Ljubljana (40% growth) than in Maribor (29% growth). In the case of economic impacts, the highest correlation between the impacts and tourism development, as most of the impacts are rated as 3, while the lowest correlation is in the indicators of purchasing power and price growth; for the latter there is no correlation at all. For some indicators, where at first glance we would have assessed a direct link between growth and the indicator, we have not been able to do so due to the values of the indicators, which have remained stable over the last five years despite the steep growth in tourism. Such indicators include, for example, the growth in museum ticket prices, as prices have remained the same. The same is true regarding seasonality of work, which is not reflected in official employment statistics. The situation is of course different for student work, where the link between the growth of tourism and indicator is more obvious. There was a more marked change in the growth of tourists use of the real estate because of the development of tourism. In Ljubljana, the number of active advertisements increased by just over half (1,341 advertisements in 2014 and 2,102 in 2019), and in Maribor by 70% (87 advertisements in 2014 and 150 in 2019). The impacts, rated 2, related to tourism employment, the growth in tourism's share of GDP, tourists' daily consumption in terms of expenditure, and the increase in tourists using the two cities' real estates. The changes were similar in the two cities. Among them, the increase in the number of employees in managerial positions stood out with a growth of around 5%. In Ljubljana, 748 people were employed in managerial positions in 2014 and 788 in 2019, while in Maribor the figure was almost six times lower in both years (179 in 2014 and 185 in 2019). The impact, which was not due to the growth in urban tourism, was linked to the increase in the income of residents in the city centre. This impact was accompanied by a growth of 18% in both cities, and was more dependent on the general labour market situation than on the growth of tourism activity in the two city centres. In Ljubljana, the average gross income per recipient in the city centre was EUR 16,362, while in Maribor it was EUR 12,795.

According to Table 5.14, the environmental and spatial impacts showed the lowest dependence on the growth of urban tourism, with only two indicators in Maribor and three indicators in Ljubljana receiving a score of 3. In Ljubljana, these were the increase in tourist capacity and the increase in the price of real estate for business, while in Maribor they were the increase in the use of space for tourism and the increase in tourist capacities. The last indicator concerned investment in new infrastructure, which was directly linked to tourism development. Most of the same impacts between the cities were found in score category 2 and related to the amount of waste collected, mobility (bicycle rental system, use of public transport) and the increase in the price of housing and real estate

for business in Maribor. In terms of the amount of waste collected per capita, Ljubljana and Maribor both recorded an increase of 9%, with no difference in absolute values. As the amount of waste collected was not measured only for tourism, this impact could not be attributed a value of 3. A slightly higher variation over the five-year period was observed in the mobility category, where the share of tourists travelling by public transport stood out. In Ljubljana, this share decreased by almost 60%, and in Maribor by 80%. A more significant change was also observed in the share of tourists travelling by air. In the rating categories 3 and 1, we only detected one effect. The increase in the number of beds was mostly due to the growth of urban tourism in Maribor, where the number of beds increased to 6,160 in 2019 (4,038 beds were recorded in 2014). In Ljubljana, we only recorded a 16% growth, which meant a total of 20,945 beds in 2019. However, the average price per m<sup>2</sup> for establishments sold in the city was an impact that was not due to the growth of urban tourism, as the indices also show. Although one would expect the price of pubs to rise as a result of tourism development, this was not the case in practice. In Ljubljana, the price per m<sup>2</sup> for pubs sold fell from EUR 1,930/m<sup>2</sup> in 2014 to EUR 1,420/m<sup>2</sup>, and in Maribor from EUR 980/m<sup>2</sup> to EUR 970/m<sup>2</sup>.

Urban tourism as a cause	Ljubljana	Maribor
<b>3 - largely due to growth in urban tourism</b>	<b>Increase in tourist capacities (total number of beds)</b> Increase in tourism capacity (number of beds in hotels and similar facilities) Increase in prices of pubs	Increased use of space for tourism <b>Increase in tourism capacity (number of beds)</b>
<b>2 - to a lesser extent due to the growth of urban tourism</b>	<b>Increase in collected waste</b> Increase in the prices of apartments Increase in users of bike rental systems <b>Growth in the share of JPP in the "modal split" (private car)</b> <b>Growth in the share of JPP in the "modal split" (public transport)</b> <b>Increase in the share of tourists travelling by plane</b>	<b>Increase in collected waste</b> Increased income from the rental of public spaces Increase in tourist capacity (total number of beds) Growth in prices of apartments (average price per m <sup>2</sup> sold for €/m <sup>2</sup> for apartments in the city) Increase in apartment sales Increase in prices of pubs Increase in sales of pubs <b>Growth in the share of JPP in the "modal split" (private car)</b> <b>Growth in the share of JPP in the "modal split" (public transport)</b> <b>Increase in the share of tourists travelling by plane</b>
<b>1 - not a consequence of urban tourism</b>	Increased emissions Increase in housing sales Increase in sales of real estate for business Increase in prices of pubs (average price per m <sup>2</sup> sold for for pubs in the city)	Increasing apartment prices <b>Growth in prices of real estate for business (average price per m<sup>2</sup> sold for for pubs in the city)</b> Increase in users of bicycle rental systems

The territorial governance impacts showed the most differences between Ljubljana and Maribor, with Ljubljana identifying significantly more links between tourism development and impacts. In Maribor, however, the identified governance changes seem to have depended more on other factors than tourism or no major changes were observed. This was the case for the number of air passengers, the price per parking hour, UNESCO applications that were not submitted, and so on. The strengthening of strategic planning was seen in both cities as having had impact but was due to the growth in urban tourism to a lesser extent. Ljubljana and Maribor had tourism development strategies in place in both years, and in assessing the impact as a consequence of growth, discussions

**Table 5.14**  
Evaluation of the growth of environmental and spatial impacts for Ljubljana and Maribor in relation to the growth of urban tourism as a development objective

with various stakeholders led to the conclusion that implementation in the tourism sector did not follow the strategies. The second comparable impact, rated 1 - the impact was not due to the growth of urban tourism, was the increase in the number of scheduled air destinations. The number of air destinations has not changed significantly in Ljubljana, despite the airport, nor in Maribor, which is still without scheduled air connections despite the existing airport. When the impacts in category 3 - the impact was largely due to the growth of urban tourism were compared, it was shown that in Ljubljana we have placed in this category mainly the impacts related to the tourist tax, employment in the tourism sector, promotion and sustainability of tourism, while in Maribor the impacts are more related to the planning of tourism infrastructure. The impacts rated as 2 in Ljubljana were mainly focused on the development of potential tourism products (UNESCO) and events, and public transport, while in Maribor the increase in the tourist tax was considered to be to a lesser extent due to the growth in tourism, as the increase was not large. The new inscriptions on the cultural heritage list in Ljubljana were identified as an effect that was not due to the growth of urban tourism, but probably stemmed from a desire to raise the profile of cultural heritage. In the category of management effects, the sustainable orientation of tourism was identified as an effect that could not be assessed and was linked to the number of certificates and awards that had been received; Maribor has not received any.

**Table 5.15**  
Evaluation of the growth of territorial governance impacts for Ljubljana and Maribor in relation to the growth of urban tourism as a development objective

Urban tourism as a cause	Ljubljana	Maribor
3 - largely due to growth in urban tourism	Increase in tourist tax Increase in the amount of tourist tax collected Increase in the number of employees at the TIC and LTO Increased expenditure on tourism promotion Increase in the number of air passengers Sustainable orientation of tourism	More events in public spaces Building new tourist facilities
2 - to a lesser extent due to the growth of urban tourism	Increase in dedicated spending of tourist tax Strengthening strategic planning Increase in the number of multiple days of music/cultural festivals New UNESCO entries (number of UNESCO entries) New entries on UNESCO lists (number of applications for UNESCO inscriptions) Increase in the number of JPP products for tourists Increase in the price of an hour of parking in the centre (street) Increase in the price of an hour of parking in the centre (parking house) Increase in the number of international rail connections per day	Increase in tourist tax Strengthening strategic planning
1 - not a consequence of urban tourism	New entries on the cultural heritage list Increase in the number of scheduled flight destinations (flights, winter)	New entries on UNESCO lists (number of entries on UNESCO list) New entries on UNESCO lists (number of applications for UNESCO list entries) Increase in the price of an hour of parking in the centre (street) Increase in the price of an hour of parking in the centre (parking garage) Increase in the number of scheduled flight destinations (summer, winter) Increase in the number of air passengers Increase in the number of international rail connections per day
0 - impact cannot be assessed		Sustainable tourism

## 5.4 Conclusion

In this chapter on assessing the impacts of urban tourism, we provide an example of the use of Territorial Impact Assessment as an integrated method for assessing impacts. It is a robust assessment method that allows the evaluation of thematically diverse impacts (social, economic, spatial and territorial governance) and the use of different types of methods - qualitative and quantitative, and mixed methods. An additional advantage of the method is the easy involvement of different stakeholders and the ability to collect their views on impacts. We did not involve the residents in the assessment as they did not respond to our invitation through the local community.

The weaknesses of this approach lies in the lack of publicly available data that would have given a more rounded picture of tourism. Particularly problematic is the environmental-spatial domain, for which there is a lack of publicly available data at a municipal level. Equally problematic is the governance domain, for which data needs to be "hand-collected" from municipalities or competent institutions, not all of which were equally responsive. While the City Municipality of Maribor provided us with the requested data on public space management (rental prices, fees) within two days, we had still not received (at the time of writing) this data from the City Municipality of Ljubljana. Data on crime, accessibility and use of public transport was also lacking. The police do not keep separate data for crimes committed against tourists; they only have data on the identities of perpetrators. We also did not get data on international bus connections and passenger numbers. It was not provided to us by the service providers, nor is it publicly available.

In terms of substance, at least in the case of Ljubljana and Maribor, the assessment debunked some of 'myths' about urban tourism impacts. These include the emptying of the city centre (the population numbers have not really changed) and increased crime (the data provided by the police did not confirm this). At the same time we were able to confirm positive social impacts in the direction of the globalisation of Ljubljana, in terms of the origins of foreign tourists, Erasmus students, applications for UNESCO recognition of cultural heritage, and others. In the economic field, the assessment was impoverished, as an accurate assessment of the economic effects would require modelling and calculation of the contribution of tourism to GDP at a municipality level; these aspects are not calculated by the national statistical office. A substantive comparison between Ljubljana and Maribor showed that there are several strong negative impacts in Ljubljana, which were not detected in Maribor. This concluded was evidence in both the qualitative assessment (smaller set of impacts) and the quantitative assessment. The growth of urban tourism appeared to be an obvious impact factor in about one third of the identified impacts, while for the others there is a need to investigate more broadly which factors had an impact. This could be a starting point for further research. A more detailed assessment of the individual measures could also be carried out and linked



to indicators; such an approach would give us an even more detailed assessment of the cause-effect links that exist between tourism development policies and the impacts of urban tourism.

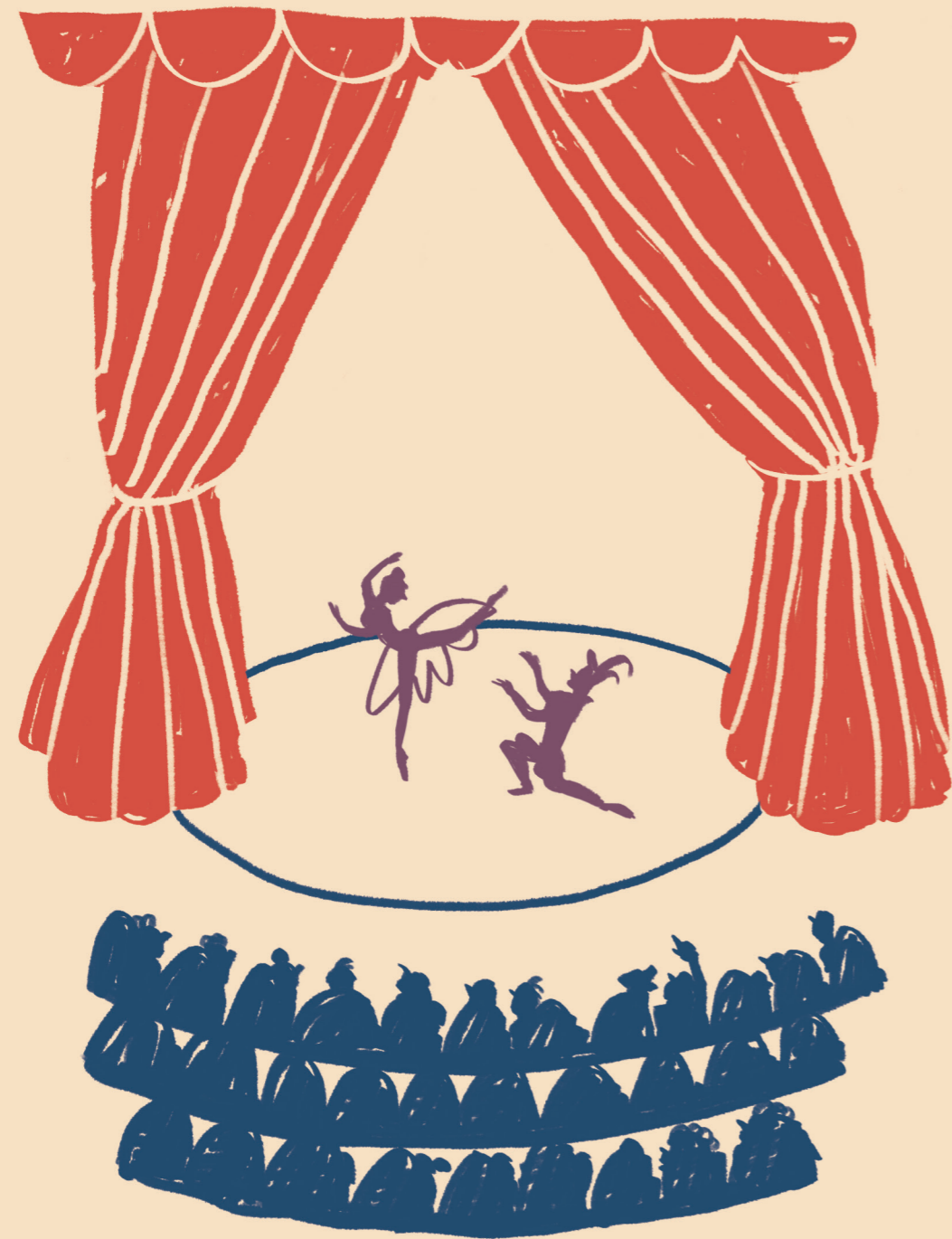
The experience of the audit can be seen as positive, as it offered the opportunity for a comprehensive impact assessment, a validation of existing datasets in tourism, and the possibility to involve different stakeholders in the audit. The example we have described in this chapter is useful for subsequent assessments and could be tested further in the case of tourism in natural areas or as an ex-ante assessment in the preparation of future tourism policies.

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## Chapter 6

### **Spatial aspects of the development and promotion of urban tourism**

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## 6.1 Introduction

According to the World Tourism Organisation (UNWTO, 2014; UNWTO and Ipsos, 2019), urban tourism is one of the fastest growing types of tourism and a common denominator for other types of tourism present in cities. As highlighted in Chapter 2 of this monograph, urban tourism is a multidimensional phenomenon within which human and spatial factors intersect, manifesting themselves, *inter alia*, as tourism flows, services, or offerings in an area. The spatial dimension of urban tourism, which is the subject of this chapter, was described in the 1990s by Burtenshaw (1991), who defined in more detail the functional areas in which visitors look for certain characteristics that make them visit a city and with which inhabitants also identify in their daily lives. He stressed that a tourist city is a multifunctional area which includes different elements in the outlined zones with which tourists identify themselves to a greater or lesser extent. Despite pioneers such as Ashworth (1989, 2003, 2009), Ashworth and Page (2011) and Edwards et al. (2008), who were the first to explore the spatial development and planning aspects of urban tourism, this research field has only started to develop more in recent years, as the effects of this activity on cities have become increasingly visible. The fact that cities are increasingly becoming tourist destinations is also reflected in the Global Destination Index (MasterCard, 2019), which has recorded remarkable growth in international arrivals (76%) and tourism spending (91%) in the largest global city destinations between 2009 and 2018. Most research has focused on the largest city destinations such as London, Paris, Barcelona, Berlin and Prague (Colomb and Novy, 2016; Maitland and Newman, 2009; Shoval, 2018); this prompted us to examine the spatial aspect of city tourism in smaller city destinations in Central Europe and Slovenia.

The rapid development and associated increasing environmental and social impacts of urban tourism have recently brought the subject matter increasingly under the scrutiny of researchers. Among the identified impacts, as described in more detail in Chapter 5, we can report changes in the provision of services, an increase in pedestrian flows in the most touristic areas of cities, e.g. city centres, and the development of tourism infrastructure that takes precedence over the development of infrastructure that would otherwise be more beneficial to locals. All of these effects have a spatial dimension in common and they also materialise as physical elements of urban space (e.g. urban design, regulation of public space, traffic areas, use of buildings and facilities). In addition to the study of the spatial distribution of tourism and tourism infrastructure, researchers are increasingly studying the behaviour and spatial flows of tourists in cities and their motives and reasons for visiting particular tourist attractions and urban areas (Božič et al., 2017; Pulido-Fernández, Rodríguez-Díaz and Cárdenas-García, 2020; Caldera and Kastenholz, 2020; Mahboob et al., 2021).

Spatial analyses of tourism in cities often follow the analysis of the presence of tourist establishments and attractions, comparing them with the services provided to local populations and their number over time. Using the historic centre of Venice as an example, Bertocchi and Visentin (2019) added to this data a survey of local residents on their attitudes towards tourism and the reasons for their potential out-migration. Between 2008 and 2019, the number of tourist beds in the city increased fivefold and the number of restaurants increased significantly, while the number of local inhabitants decreased by 13%. Inhabitants also pointed to the growth of tourism as one of the reasons for their departure. Batista e Silva et al. (2018) calculated the density, seasonality, and vulnerability of tourism for the whole of the European Union using a combination of official statistics and data from online booking portals. Their analysis showed that European capitals are among the biggest hotspots for European tourism, with the largest cities in particular not having a pronounced problem with the seasonality of tourist arrivals. Further demonstrating the link between space and tourism, a study on the most important determinants of urban tourism attractiveness for tourists (Boivin and Tanguay, 2019), based on a survey of visitors to Quebec City and Bordeaux, gave the highest importance to elements related to the urban environment and public space (architecture, urban atmosphere, pedestrian areas, monuments, public spaces, and parks).

The question of how tourists behave at a destination and what influences this is becoming increasingly interesting. Kádár (2013) analysed the impact of morphological differences between Vienna and Prague on tourists' spatial behaviour by analysing geolocated photographs of tourists. The analysis showed that morphology and the ways in which tourist infrastructure is developed have a strong influence on this; despite the similar number of tourists in Prague, there is excessive crowding - a key cause is the monofunctional use of the city centre - a scenario that is not present in Vienna. The impact of morphology on tourism is also discussed in more detail by Xie and Gu (2018) who, amongst other things, point out that not only does morphology influence tourist behaviour, but that tourism also co-shapes the morphology of cities over time. Often, researchers use GPS trackers to help them analyse routes. GIS analysis of data on the routes and movement speeds of tourists visiting Tarragona, Catalonia, as a stopover during a cruise showed that, apart from the time limitations of visits, the visibility and presence of tourist attractions and the type of economic activities (presence of commercial activities and restaurants) had the greatest influence on them. The location of accommodation also has a strong influence on tourists' behaviour (what they visit and at what time of day), as found by Shoval, McKercher, Ng, and Birenboim (2011). They have tracked guests of four different hotels in Hong Kong and found out the tourists tend to visit attractions in the vicinity of the hotel, and that accessibility strongly impacts the journeys they made.

The literature review has shown that official statistics, data on tourist bookings through online portals, GPS trackers and various question-



naires are often used in spatial analyses of tourism. It is clear that the length of visits, the morphologies of cities, and the locations of accommodation, attractions and (tourist) services have a strong influence on tourists' behaviour. Based on this, we decided to also use the example of Ljubljana and Maribor to examine the current spatial dimensions of tourism in the two cities, i.e. where tourism infrastructure and offers in the cities exist and where they are being developed. Furthermore, we were interested in how the cities target tourists at the destination through different promotional channels and how this is reflected in the actual patterns of behaviour and the journeys made by tourists within the two destinations.

## 6.2 Methodology

The research consisted of several methodological steps. In the first part, a comparative spatial analysis of the occurrence of urban tourism in selected Central European cities was carried out in order to better understand the development of urban tourism in Slovenian cities. A review of basic tourism and demographic statistics for ten selected cities (Bratislava, Graz, Leipzig, Ljubljana, Maribor, Padua, Poznan, Turin, Zagreb and Zurich) was complemented by a cartographic analysis of their morphology, as well as tourist attractions and tourism infrastructure in a narrower area of 2,000 × 1,600 metres of the old city centre. As the main attractions we identified the town hall, the castle, the theatre, the opera, the galleries and museums (city museum, city gallery, and so on) and the city cathedral. In addition, we schematically presented the city centre areas, the main green areas, the transport nodes (main bus station, railway station and airport), the road network and the river, which are common features of the morphology of most Central European cities. To this – and based on an assessment of the cartographic data of accommodation on Booking.com and Trip Advisor and our own knowledge of the destination – we added an outline of the area of the tourist-business district, where tourism is one of the key economic activities. We have also shown the spatial distribution of the main tourist attractions and cultural quarters. This was done to determine the extent to which cities in Central Europe are similar in terms of their spatial incidences of tourism and to also enable us to assess the extent to which this European context is transferred to Ljubljana and Maribor. We were interested to see how many of the top ten tourist attractions promoted on official tourism websites are concentrated in the city centre, what the distance is from the town hall to them, and what type of attractions they are in relation to the physical spatial elements of the city they represent. We used the categories: buildings, public spaces, green areas, and events.

The Central European context was built upon with a more detailed spatial analysis of the distribution of tourist attractions and services in Ljubljana and Maribor at several levels (Stubičar and Marot, 2022). The first level was based on an analysis of accommodation and catering

services, which were first displayed according to the category of offer (hotels, hostels, campsites, etc. for accommodations, and restaurants, cafés, etc. for services), and then according to the satisfaction or ratings of tourists (data acquired from the Trip Advisor web portal). As a basis for the spatial analysis, we used publicly available data (Open Street Map, 2021), which was then analysed in the QGIS geoinformation environment. The second level was based on an analysis of the occurrence of tourist attractions in promotional channels, which was made from an inventory and the sum of the occurrences in printed guidebooks and online guides or blogs. We obtained and analysed 17 guidebooks in foreign languages (English, German and Italian). Of these, five focused exclusively on Ljubljana, two on Maribor, and the rest covered both tourist destinations. The blog analysis covered 41 blogs for Ljubljana and 19 for Maribor. We took into account the blogs on the first three pages of Google search hits, and the Maribor Tourist Board provided us with six blogs with which they had directly collaborated. The blogs were linguistically slightly more diverse; English was the predominant language, but there were also blogs in Italian, French and Polish.

The dataset was initially categorised into three basic groups according to the type of attraction: cultural institutions, open spaces, and religious and historical sites. Cultural institutions included: galleries, museums and exhibition centres and venues. Open spaces included not only parks and squares but also streets, bridges and quays, while historic and ecclesiastical sites included not only architectural buildings but also monuments, statues and historical remains. The data was first presented on overview maps so as to bring together all the sites regardless of source. For these categories of attractions, we then separately mapped the frequency of mentioned occurrence for each attraction (a higher number of mentions is represented by a darker shade) to identify more and less promoted attractions. This analysis allowed us to compare the two promotional channels in question, to identify the representation of the tourism offer, and to evaluate how it changes according to the types of promotional channel used.

The third level of insight into urban tourism in Ljubljana and Maribor was based on a survey conducted in both cities in July and August 2021. 581 tourists with an average age of 33.7 years took part in the questionnaire in Ljubljana, and 63 in Maribor, where the average age was 34.5 years. In Ljubljana 59% of the sample were female tourists and 41% were male tourists, while in Maribor the picture was reversed (28 females and 35 males). The majority of tourists were from abroad (531 out of 581 in Ljubljana), mostly from countries close to Slovenia (Germany, Italy, Austria and others). The questionnaire contained 26 questions. The first part of the questionnaire was used to identify the profile of the urban tourists in general and on their current trips, the second part was used to check their knowledge of the destination, and third part was used to check their experiences at the destination. Within the spatial dimension of urban tourism, the subject of this chapter, we focused mainly on the recognition and visitation of the selected

tourist attractions. We were also interested in the ways in which tourists obtained information about the visited destination and its offers, and whether there was a link between the information obtained and their movement around the city. We supplemented this by asking tourists to map their movement at the destination, which we then analysed in QGIS to create maps of tourists' movements in Ljubljana and Maribor.

### 6.3 Tourism in the space of Central European cities

#### 6.3.1 Basic tourism statistics

To illustrate the Central European context, we compared Ljubljana and Maribor as tourist destinations with eight other Central European cities with similar spatial dimensions, populations of between 110 and 880 thousand inhabitants (Eurostat, 2021), and tourism volumes (up to 5.1 million registered tourist nights per year (ECM, 2019)). Among the selected cities are three national capitals (Bratislava, Ljubljana and Zagreb), four regional or provincial capitals (Graz, Poznan, Turin and Zurich) and three cities without a major political role (Leipzig, Maribor and Padua). All of them had experienced growth in tourist arrivals in the years preceding the Covid-19 pandemic, as shown by the number of registered overnight stays (see Table 6.1), but the rate of this growth varied between the cities. This is clearly illustrated by the case of Graz and Ljubljana which recorded similar numbers of overnight stays in 2014. In the period up to 2018, Graz recorded a 10% growth in overnight stays, while in Ljubljana the number of tourist overnight stays more than doubled; its status as a national capital city contributed to this.

By comparing the number of tourists overnight stays with the number of inhabitants, we estimated the volume and intensity of tourism in cities. Zurich had the highest number of overnight stays per capita (12.0), followed by Padua (7.9), Ljubljana (7.5), Bratislava (6.2), Leipzig and Turin (both 5.8). This index suggests that these cities are more susceptible to the phenomenon of overtourism. Graz (4.2), Maribor (4.1), Zagreb (3.2) and Poznan (2.7) had fewer than five overnight stays per inhabitant. Comparing the number of tourist beds per 100 inhabitants is another indicator that can be used to show the extent and intensity of tourism in cities. Again, Zurich had the highest value (5.7), followed by Turin (3.4), Padua (3.2), Zagreb (3.2), Leipzig (3.1) and Graz (2.8). The lowest values were found in Poznan and Ljubljana (1.7 and 2.2 respectively). Despite the growth in tourist arrivals, the occupancy rates of tourist beds in the selected cities remained relatively low, with only Zurich, Ljubljana and Leipzig exceeding 50%. For Bratislava and Maribor this data was not available in the ECM Report. Although most of the indicators for the Slovenian cities are somewhere in the average of the other Central European cities considered, Ljubljana and Maribor stood out for their exceptionally high shares of foreign tourists, as well as high growth rates of tourist arrivals in the years preceding the Covid-19 pandemic; both factors thus highlighted the need for closer monitoring of the development and impact of tourism in these cities.

City	Population (000)	Overnight stays (000)	Growth of own. stays 2014-2018 (%)	Foreign overnight stays (%)	Tourist beds (per 100 inh.)	Overnight stays (per 100 inh.)	Occupancy of tourist beds (%)
Bratislava	430	2,692	50	61	-	6.4	-
Graz	289	1,129	10	55	2.8	4.2	41.2
Leipzig	582	3,376	22	16	3.1	6.3	52.6
Ljubljana	290	2,180	113	95	2.2	7.7	51.6
Maribor	111	452	89	88	-	4.0	-
Padua	210	1,650	25	45	4.6	7.9	47.1
Poznan	536	1,484	26	26	1.7	2.7	42.9
Turin	883	5,110	26	25	3.4	5.8	46.7
Zagreb	804	2,522	62	84	3.2	3.2	27.3
Zürich	409	4,898	20	74	5.7	12.0	60.0

**Table 6.1**

Population and tourism indicators for selected cities in 2018 (ECM, 2019; Eurostat, 2021, Statistics Poland, 2021; Statistik Austria, 2021)

#### 6.3.2 Spatial analysis of tourism presence

The graphical analysis of the urban fabric of the selected cities (Figure 6.1) shows that the urban structures of all the cities are strongly influenced by natural features. The first such spatial determinant are rivers, as most cities are located directly on the river, with the exception of Leipzig, Turin and Zagreb, which are located a short distance from their respective rivers. Bratislava, Maribor, Padua and Poznan are located on the riverbank, while the river runs through the urban core of Graz, Ljubljana and Zurich; all Alpine cities. Elevated (hilly) terrain was identified as the second determinant shaping cities. Bratislava, Graz, Ljubljana and Zagreb have their city centres directly below the escarpment, while Maribor and Zurich are more distant from them. Leipzig, Padua, Poznan and Turin are located in flatlands; enabling a more dispersed development of their urban fabric. Areas with higher slopes make up the bulk of the green areas in the cities; most noticeable in Bratislava, Graz, Ljubljana, Maribor and Zagreb. Leipzig is the only city that has a larger flat green area close to the city centre; the riverside forest. Padua, Poznan, Turin (all flatland cities) and Zurich are cities without major green areas. In terms of the spatial distribution of their main transport nodes, half of the cities have their main bus and train stations located close to their city centres (Leipzig, Ljubljana, Maribor, Turin and Zurich), while in the other cities they are too far away to be accessible on foot. The airports of the selected cities are located up to about 20 kilometres from the respective city centres. The morphological and spatial characteristics of the urban structures are further reflected in the levels of concentration of tourist offers in the selected cities; most evident in the cases of Bratislava, Graz, Ljubljana and Maribor.

Figure 6.1

Analysis of the urban fabric and basic tourism infrastructure in the wider area of old towns of the selected cities

Legend

Tourist sites:

- Town hall
- Castle
- Cathedral
- Tourist information centre
- Congress centre
- Gallery, museum
- Theatre, opera

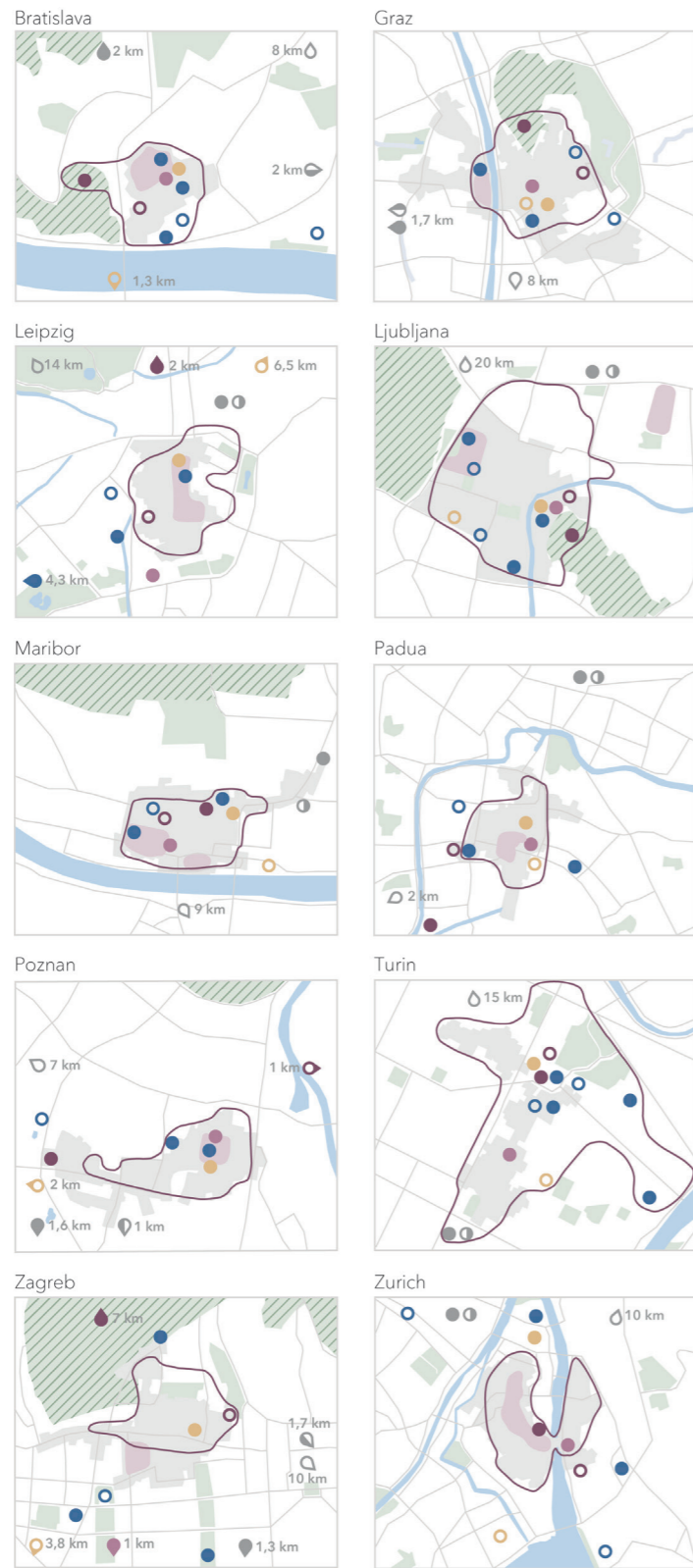
Transportation hubs:

- Main train station
- Main bus station
- Airport
- Direction from town hall
- Main road network

Type of Urban Area

- City centre
- Cultural quarter
- Tourist business district
- Green area
- Elevated green area
- River, water area

Scale: 1 km



6.3.3 Spatial analysis of the promotion of tourist attractions

Cities are increasingly active in developing and marketing their own tourist destinations. Precisely planned promotion is one of the key reasons why urban tourism has experienced high levels of growth in recent years. Cities are undertaking such promotion through a variety of tourism attractiveness factors and promotional tools. These may include, for example, the status of being a capital city of a country or region, and titles awarded by UNESCO (inclusion in a network of creative cities or heritage sites) or by the EU (European Green or Cultural Capitals). The various titles and awards are often seen as promotional tools that can put a city on the global tourism map; e.g. Barcelona as an Olympic city (Monclús, 2003; Hiller, 2006), Liverpool as a European Capital of Culture (Garcia, Melville and Cox, 2010). However, beyond their promotional potential, it is crucial that the award of such titles most often also brings about changes in the (given city's) urban environment. Such changes are often closely linked to spatial planning. Among the selected Central European cities, two cities have been awarded the title of European Capital of Culture (Graz in 2003 and Maribor in 2012), one city was awarded the title of European Green Capital (Ljubljana in 2016), and one hosted the Olympic Games (Turin in 2006).

As official promotion is also important for tourists' sightseeing decisions, we analysed the top 10 attractions promoted by the selected Central European cities on their official tourism websites. The results of the analysis are presented in the form of a spider web (Figure 6.2). We found that the majority of attractions are located in the (historic) city centres or their immediate vicinities. Poznan is the only city that has most of its top 10 attractions outside the city centre; though they are still within the city limits. Turin and Zurich are the only cities that promote attractions in the wider surrounding of the city (ie outside the area of urban settlement).

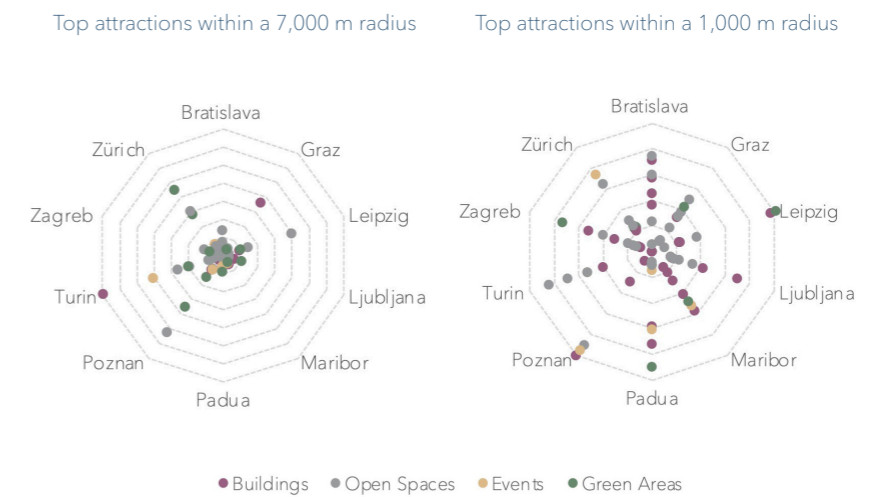


Figure 6.2

Spatial distribution of the top 10 attractions as listed on the destination's official tourism website and categorised as facilities, open spaces, events, and green areas. All attractions are shown on the left (1,000 m grid) and those within 1,000 m of the Town Hall are shown on the right (200 m grid).



## 6 Spatial aspects of the development and promotion of urban tourism

Cities most often promote objects or buildings; among them the most religious buildings (churches, cathedrals, etc.), castles, and town halls (Figure 6.3). Some cities also promote a greater number of open spaces (Bratislava, Graz, Ljubljana, Padua and Zagreb), while green areas and events appear on the top attractions lists of a smaller number of cities.

**Figure 6.3**  
Spatial categories of top 10 attractions, as listed on official urban destination tourist websites



### 6.4 Spatial analysis of tourist infrastructure in Ljubljana and Maribor

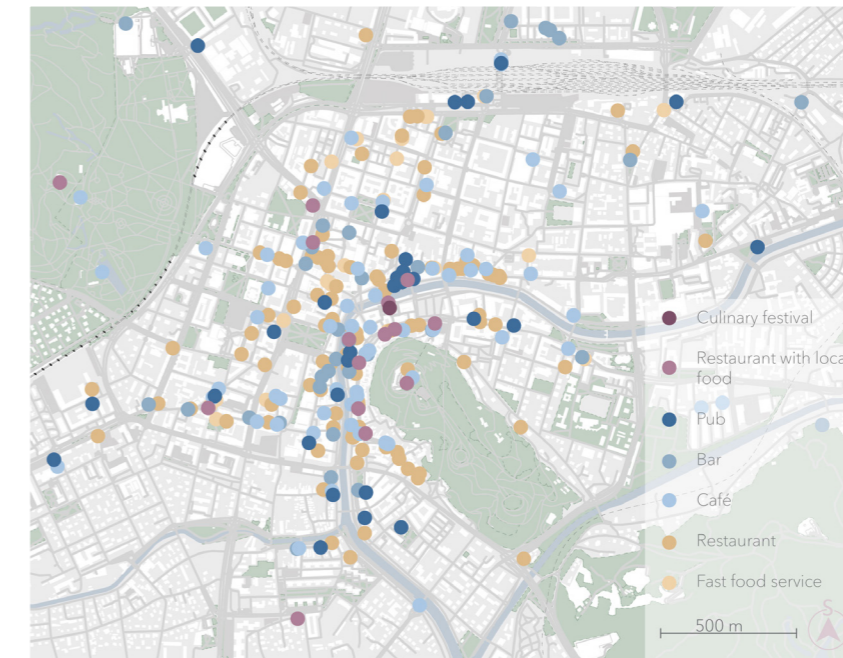
By comparing Ljubljana and Maribor with selected cities in Central Europe, we found that they largely follow European and global trends in terms of the development of urban tourism and its promotion, a facet further evidenced by an analysis of the official tourism websites of the selected cities. As we wanted to answer the question of where tourism is developing and occurring in cities, in the following steps we first looked in more detail at the state and development of tourism infrastructure in Ljubljana and Maribor. In addition to attractions and different types of open spaces (more below), the overview of tourism offers also included an overview and presentation of the spatial distribution of the catering and accommodation infrastructure in Ljubljana and Maribor.

In mapping the data, we considered traditional accommodation categories (hotels, hostels, guesthouses or caravan parking) and catering services, which include culinary festivals, restaurants, fast food establishments, pubs, cafés and bars (see Figure 6.4). In Ljubljana, restaurants and fast food establishments, pubs and cafés dominate, while prevailing among accommodation facilities - which are fewer in number than services - are hostels and guesthouses. In Maribor, hotels are the most frequently used accommodation facilities, while restaurants, fast food establishments and cafés are the most frequently used venues amongst services.

## Urban Tourism in Slovenia: Characteristics and Governance

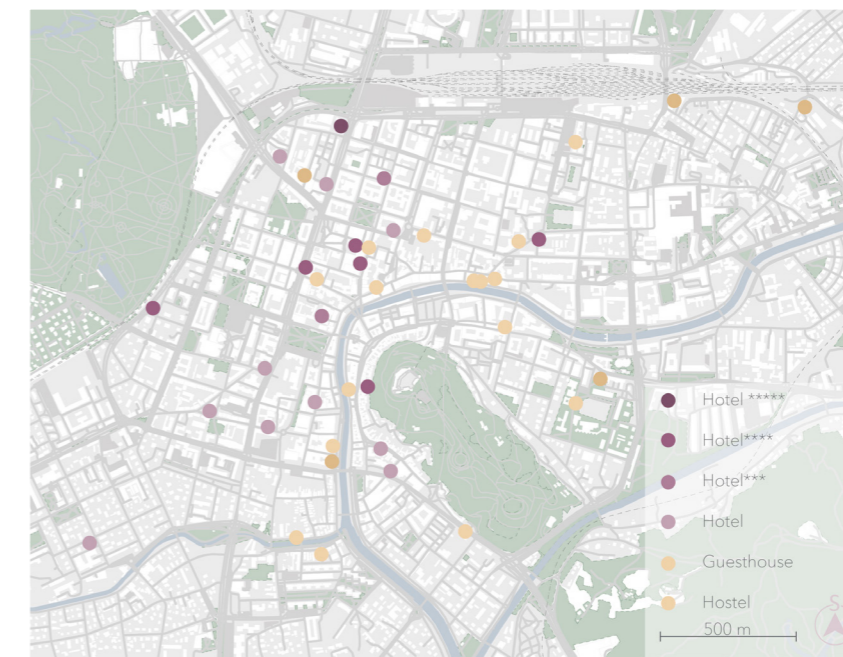
## Section B

The tourist offers of both cities are predominantly concentrated in the two city centres (or the old towns) and near the main attractions and on the riverbanks (Figure 6.4). In Ljubljana, accommodation is most concentrated in the area of Slovenska and Miklošičeva Streets, and services are most concentrated on the banks of the Ljubljanica River and under the Castle Hill, while in Maribor they can be found between the Castle Square and the Freedom Square, in the area of the Slomškov Square and the Main Square, and in Lent, on the banks of the Drava River.



**Figure 6.4**  
Spatial distribution of catering and accommodation establishments in Ljubljana and Maribor

Catering establishments in Ljubljana

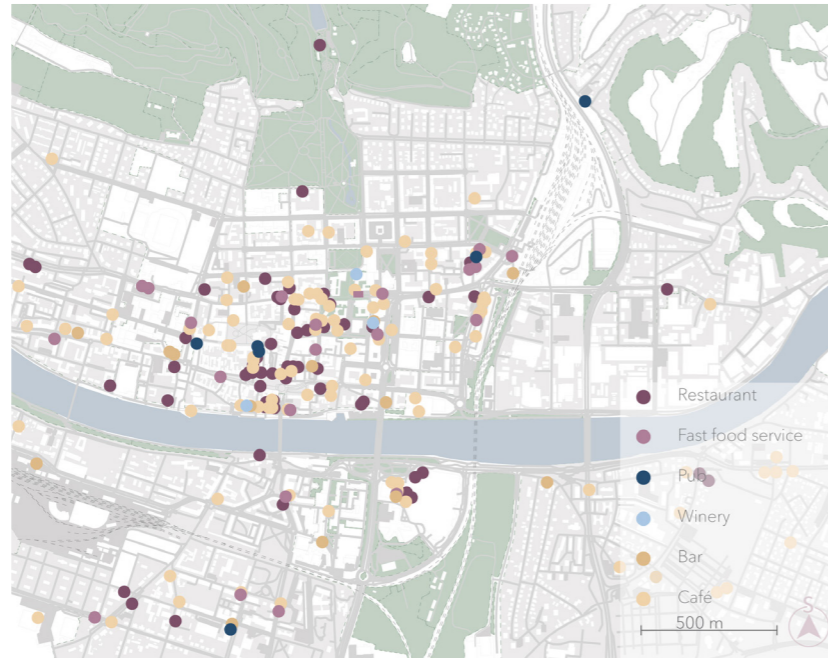


Accommodation establishments in Ljubljana

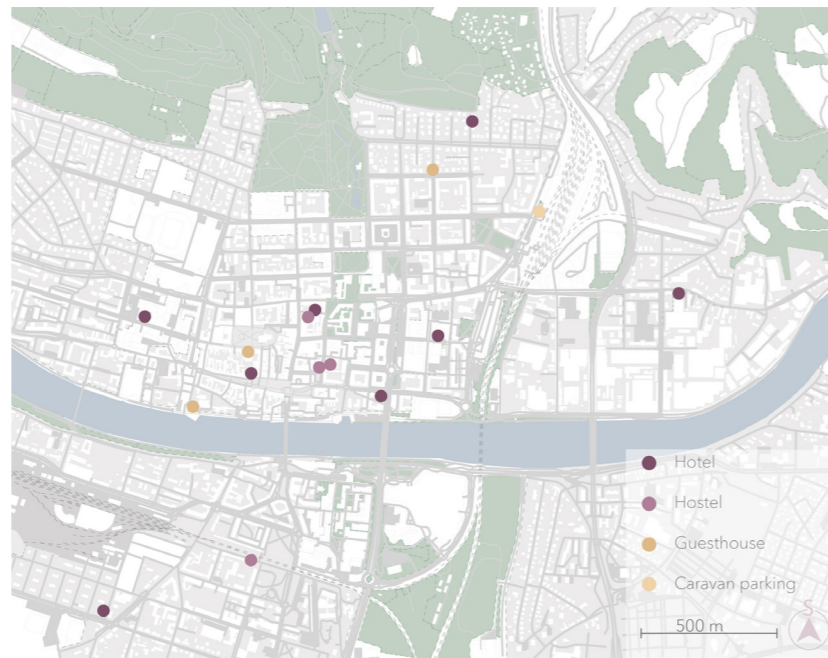


Figure 6.4

Spatial distribution of catering and accommodation establishments in Ljubljana and Maribor



Catering establishments in Maribor



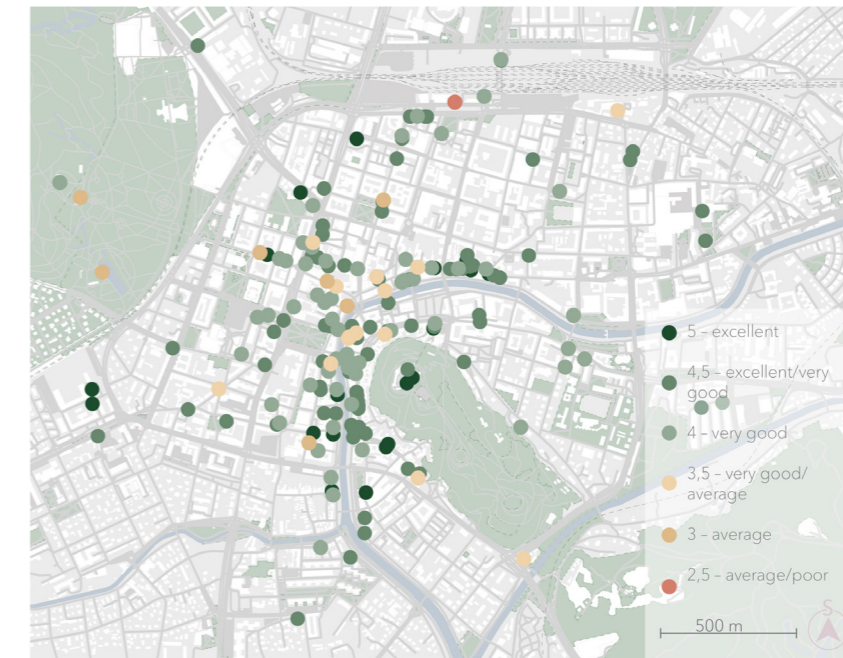
Accommodation establishments in Maribor

The obvious difference is reflected in the number of services and accommodation providers, which is much lower in Maribor; another indicator that Ljubljana is a more developed tourist destination and spatially larger. At the same time, this difference can also be attributed to the intensity of promotion and the fact that Ljubljana is the capital of the country and a model example of a developed tourist destination.

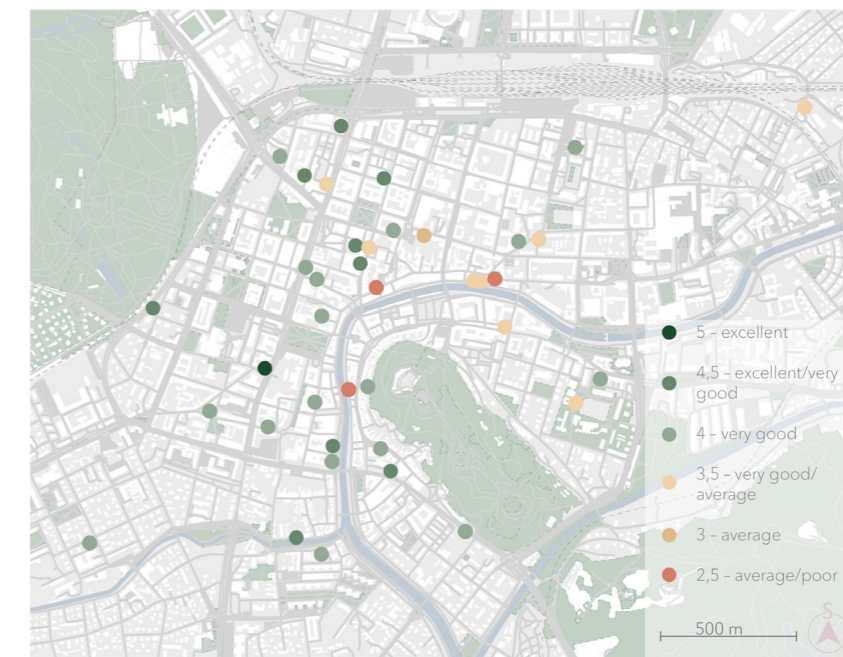
The visibility and quality of individual ratings for catering establishments is also reflected in ratings on the Trip Advisor website. The most obvious difference between the two cities is in the range of ratings. In Ljubljana, the ratings range from 2.5 - average/poor to a maximum rating of 5, while in Maribor, in addition to these ratings, there is also a rating of 1.5 - terrible/poor and unrated (Figure 6.5). For accommodation, the range of ratings is smaller, from a rating of 3 - average to a maximum rating of 5 and unrated.

Figure 6.5

Trip Advisor ratings in Ljubljana and Maribor



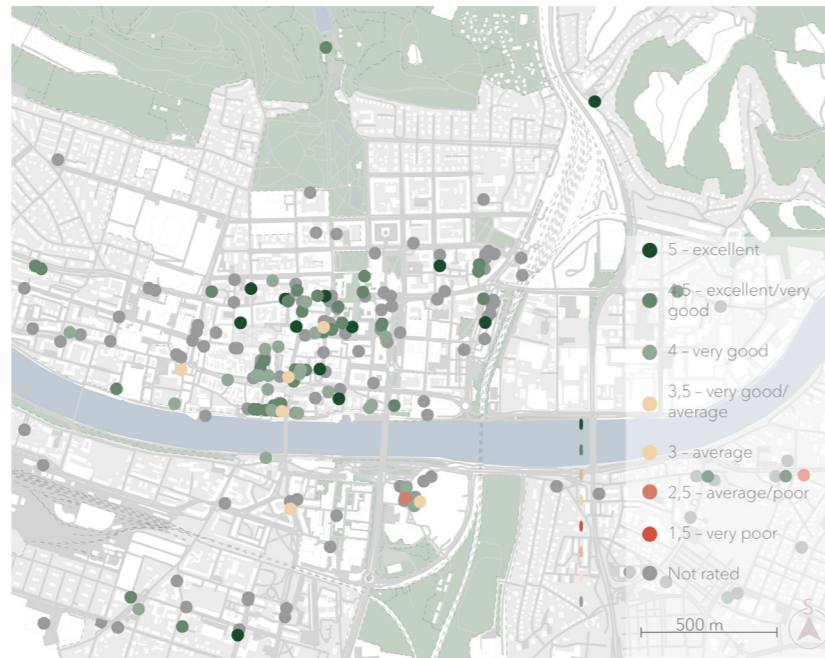
Catering establishments in Ljubljana



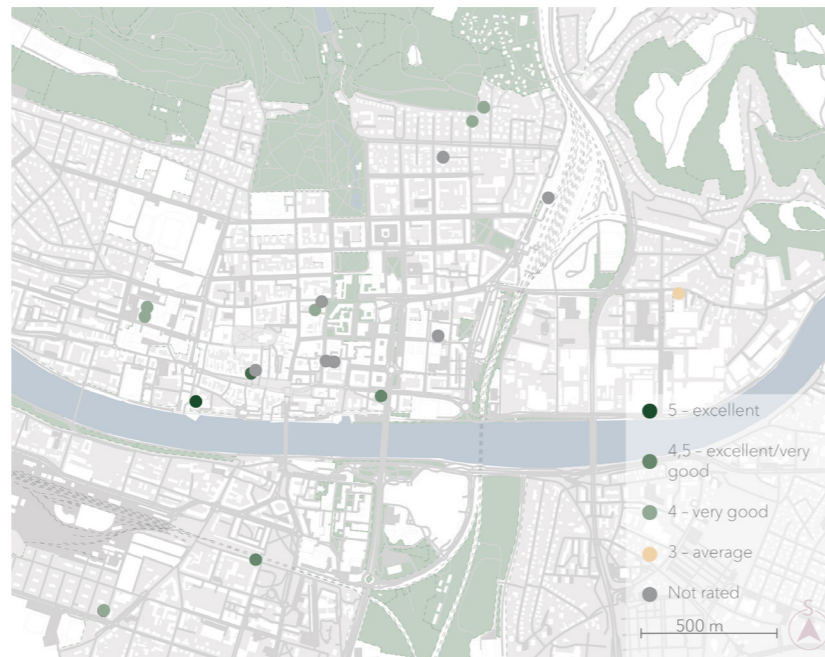
Accommodation establishments in Ljubljana



**Figure 6.5**  
Trip Advisor ratings in  
Ljubljana and Maribor



Catering  
establishments in  
Maribor



Accommodation  
establishments in  
Maribor

In Maribor, most catering and accommodation services are unrated, as they are under-visited and under-rated by platform users. In Ljubljana, positive reviews dominate, while in Maribor, positive reviews are very similar, but fewer in number. Comparing these ratings with the catering and accommodation categories in Figure 6.4, it can be seen that it is mainly pubs and cafés (Figures 6.4 and 6.5) and hotels (Figures 6.4 and 6.5) that are rated positively.

The results of the analysis of traditional accommodation showed that these are scattered around the old towns in both cities. AirDNA data shows that in both cities the number of available renting on sharing economy platforms is higher than those of traditional accommodation establishments and that, despite their prevalence in the wider urban area, they are also highly concentrated in the two city centres. In Ljubljana, private accommodation in other districts of the city can be found mainly along the main traffic arteries, while in Maribor it is also found in the vicinity of the City Park and the Piramida, and south of the River Drava in Tabor and in Nova vas districts.

### 6.5 Spatial analysis of tourist attraction promotion in Ljubljana and Maribor

Via previous analysis we have shown that Ljubljana and Maribor are active in the field of promotion and use similar contemporary marketing tools to other European urban destinations for advertising their tourist offers. The fact that they are relatively successful in this respect is shown not only by the growth in tourist arrivals, but also by various awards. Ljubljana is ranked among the most sustainable destinations, the best culinary destinations, the best congress cities, and the best European destinations (Visit Ljubljana, 2022a), while both cities have also been certified as green and safe destinations (Visit Maribor, 2022). In addition to printed and online guides, which may or may not be part of the official tourism promotion, there are various online platforms and networks that tourists and visitors use to make decisions about visiting destinations. As urban destinations are characterised by shorter lengths of stay, tourists often use different lists of the most interesting attractions to visit at such destinations. Given this, and as already mentioned in Section 6.3.2, cities create different lists, which are one of the key tabs of official tourism websites, and include different buildings, open spaces or events/experiences. In Ljubljana and Maribor, the main attractions highlighted are those that are part of the two cities' identities and histories. Ljubljana highlights Ljubljana Castle, the Dragon Bridge and the Tromostovje, while Maribor emphasises the importance of the wine-growing destination with the oldest vine in the world and the Vinag winery under the city, as well as various museums and churches.

#### 6.5.1 Basic map of tourist attractions by type of offer

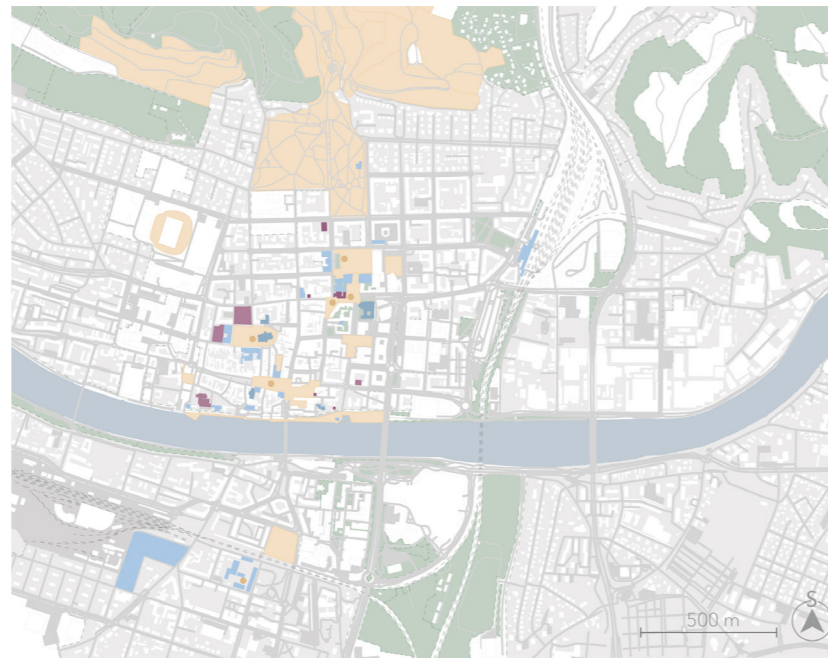
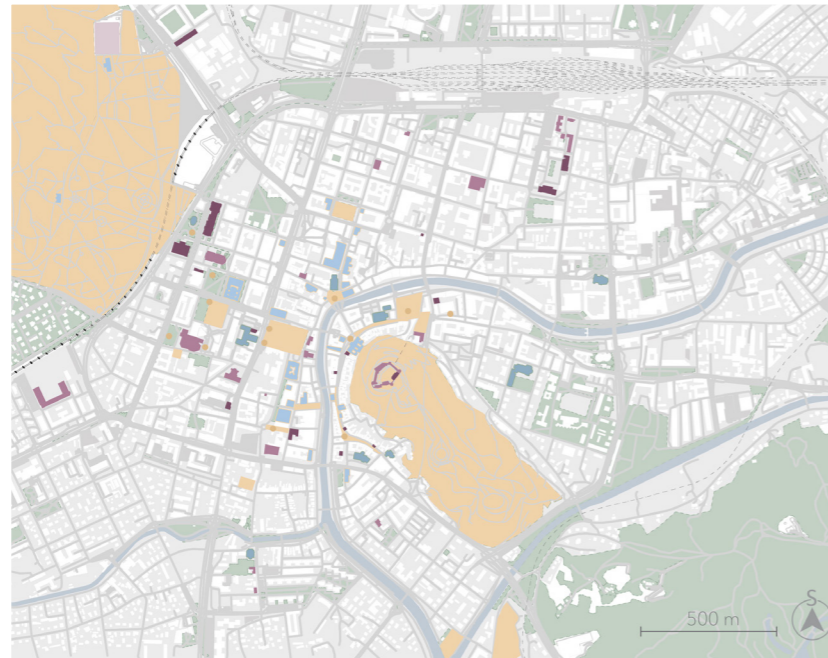
In this subsection, we first provide a basic map based on the more detailed types of tourism offers, such as: galleries and museums, cultural institutions, exhibition centres, squares and parks, statues and remains, and religious and architectural buildings. The categories established form the basis for the analysis of guidebooks and blogs. The graphical representation was narrowed down to the wider area of the city centres, as almost all of the perceived attractions are located here (Figure 6.6). In both cities, architectural buildings dominate in terms of the number of appearances, while squares and parks dominate in terms of surface area, with the majority of squares in Maribor being linked to

architectural buildings; such links were not detected in Ljubljana (Figure 6.6). The other categories are represented in a smaller number of the detected attractions, with the exception of Ljubljana, where there are slightly more galleries, museums and cultural institutions, which are more dispersed in the city centre than the architectural buildings that are of interest to tourists.

**Figure 6.6**

Tourist, cultural and natural attractions in Ljubljana and Maribor

- Gallery, museum
- Cultural institution
- Exhibition venue
- Park, square
- Sculpture, remains
- Religious building
- Architectural building



**6.5.2 Presence of tourist attractions in printed and on-line guidebooks**

Through our analysis of the printed guidebooks and online guides, we identified three dominant categories of tourist attractions in addition to the information about frequency of mention: attractions, open spaces, and religious and historical buildings. These categories are comparable to those of the analysis of online promotion (Section 6.3.2), as we have used the category of open spaces (including green spaces) in both cases, while facilities appear within the categories of attractions or religious and historical sites. We have illustrated our findings on a cartographic basis, that clearly show the difference between the marketing of the tourist offers in printed (Figure 6.7) and online (Figure 6.8) guides. In Ljubljana, the tourism offers in the printed guidebooks are more detailed and more widely presented, as the guidebooks include not only the key attractions but also other potential points of interest. Interestingly, streets, bridges and embankments do not only appear as tourist attractions, but often also as landmarks on the way to other attractions. Blogs, on the other hand, are more likely to highlight only key attractions, i.e. those that are usually also featured on the official tourism website as part of the top attractions list.

The analysis of printed guidebooks (Figure 6.7) in Ljubljana shows a similar representation among all three categories, while the analysis of blogs (Figure 6.8) shows a predominance of the category of historical and religious buildings. The offers noted in the printed guidebooks extend in area from the Castle Hill to Tivoli Park, while the offers from blogs are more concentrated along the banks of the Ljubljanica River and below the Castle Hill. An analysis of the offers in Maribor in printed guidebooks and blogs shows similar differences to those observed in Ljubljana. As in Ljubljana, attractions and open spaces (streets, parks, embankments, etc.) in the printed guidebooks (Figure 6.7) are spread out between the riverbank and the city's largest park. In both cases, historical and religious buildings predominate, while open spaces, i.e. parks and squares, stand out in terms of surface area in both cities.



**Figure 6.7**

Cartographic analysis of printed guidebooks for Ljubljana and Maribor by category of attractions: cultural institutions, open spaces, historic and religious buildings

Cultural institutions in Ljubljana (left) and in Maribor (right)



**Figure 6.7**

Cartographic analysis of printed guidebooks for Ljubljana and Maribor by category of attractions: cultural institutions, open spaces, historic and religious buildings

Open spaces in Ljubljana (left) and in Maribor (right)



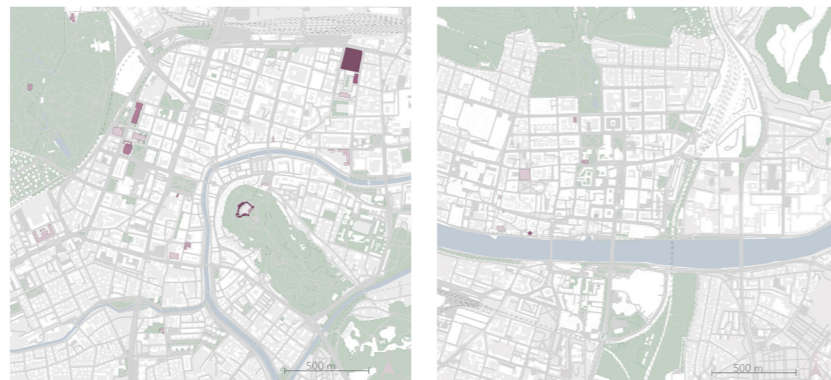
Historical and religious buildings in Ljubljana (left) and in Maribor (right)



**Figure 6.8**

Cartographic analysis of online guides (blogs) for Ljubljana and Maribor by category of attractions: cultural institutions, open spaces, historic and religious buildings

Cultural institutions in Ljubljana (left) and in Maribor (right)



Open spaces in Ljubljana (left) and in Maribor (right)



Historical and religious buildings in Ljubljana (left) and in Maribor (right)

### 6.5.3 Comparison of the occurrence of tourist attractions in printed guidebooks and online guides

Our analysis of destination promotion looks at different sources of information which address different types of tourists and visitors. Printed guidebooks are more thorough in promoting the offers and often present not only the key attractions but also the history of the area and those attractions that are, respectively, part of the official promotions run by Ljubljana Tourism and Maribor Tourist Board. Although online guides take a similar approach, they are usually shorter in length and less comprehensive. Due to the nature of this type of promotion, it is desirable to provide information quickly and concisely. They are also based on visitors' experiences, which has the effect of making the information less factual and diverse, and instead more focused on personal experiences.

Furthermore, our analysis also showed differences in the spatial representation of the offers (Figure 6.9). The same or similar attractions are described and promoted, but in the printed guidebooks they are not only presented on a larger scale but also cover a wider area outside the city centre. According to the results of the analysis, promotion in Ljubljana and Maribor mainly focuses on the tourist offers concentrated in the city centres, which, together with the increase in the number of visitors, contributes to the touristisation of the two city centres.

Our analysis of the guides confirmed that the city centres are indeed touristised, i.e. that the tourist offers are most concentrated in the narrower areas of Ljubljana's and Maribor's city centres, while this was not the case in the other city districts. In Ljubljana, the following attractions outside the city centre occasionally appear in printed guidebooks: Kino Šiška, Žale Cemetery and the BTC shopping centre, while in Maribor it is mainly sporting events in the Tabor and Radvanje districts (the latter is located at the foot of Pohorje). It is clear that in both cities the promotion of historical and religious buildings is predominant, and to a lesser extent galleries, museums and cultural institutions in the city centre area. The predominant attractions and facilities are the main tourism products of both city destinations and the driving force of cultural



tourism, which is why tourists and visitors visit the city centre districts in greater numbers. At the same time, the squares and parks, which stand out in terms of their surface area and which also link into other districts, encourage the diversion of visitor flows away from the two centres. Maribor's various sporting events also direct them there.

**Figure 6.9**

Overview maps of the tourism offer in Ljubljana and Maribor in printed and online guides



Printed guidebooks for Ljubljana (left) and for Maribor (right)

Online guides (blogs) for Ljubljana (left) and for Maribor (right)

Attractions, cultural institutions, open spaces outside the map

- North
- Kino Šiška
- Cerkev Sv. Frančiška
- Asiškega
- Cvetličarna
- Railway museum
- East
- SiTi Teater
- Shopping centre
- BTC
- Cemetery Žale
- Španski borci

Frequency categories:  
1-2 3-5 6-8 9-11 > 12

Scale: 1000m

Attractions, cultural institutions, open spaces outside the map

- West
- Mariborski otok
- Pohorje

Frequency categories  
1-2 3-5 6-8 9-11 > 12

Scale: 1000m

## 6.6 Analysis of the routes taken and visited tourist attractions in Ljubljana

Existing tourism infrastructure, offers, and marketing also influence the movement of tourists to the two destinations. Therefore, in summer 2021, we conducted a survey among tourists in Ljubljana (n = 581), asking them, among other things, about their recognition of, and visits to, main and alternative attractions, sources of information about their visits, and to draw on a city map the routes they had taken so far during their visits. The analysis of collected information provided us, on the one hand, with a tool for assessing the density of tourism and, on the other hand, with a basis for designing measures for a more spatially balanced development of tourism in the urban area in the future.

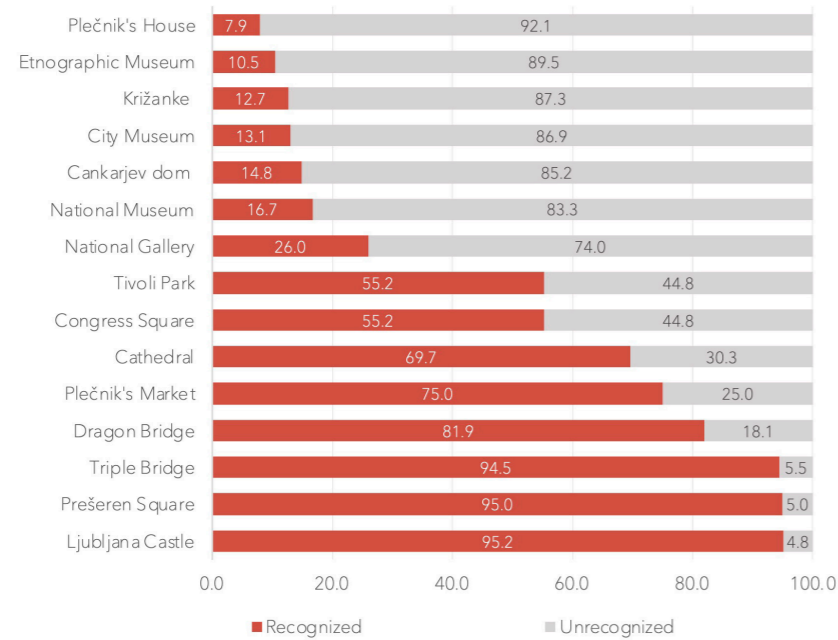
### 6.6.1 Recognition of tourist attractions

The results of the survey of tourists in Ljubljana on the recognition of (Figure 6.10), and visits to (Figure 6.11) tourist attractions clearly show which are the most recognised and visited attractions in the city. Ljubljana Castle, the Dragon Bridge and the Triple Bridge (Tromostovje) were the most popular tourist attractions, with more than 90% of tourists recognising them. This was followed by other open urban spaces (Congress Square and Tivoli) and the Cathedral. At the other end of the spectrum were individual museums and cultural institutions; sites which are known by a very small proportion of visitors and visited by even fewer (somewhere between 10 and 20%).

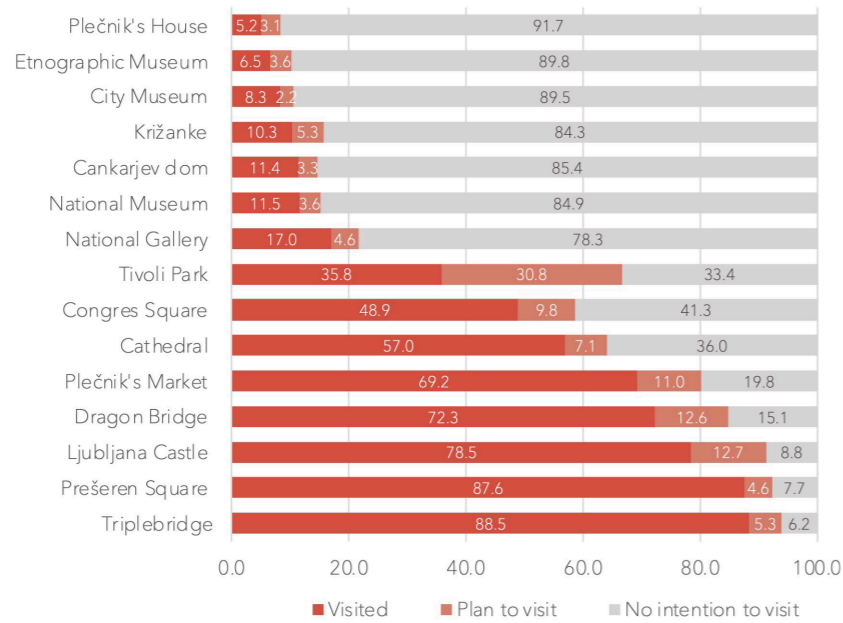
The recognition of alternative tourist attractions were also very low, with most of them below 10%. Positive standouts were the AKC Metelkova, Tivoli Castle, and Špica (Figure 6.12, Figure 6.13), which are located outside the Old Town and spatially distant from each other. AKC Metelkova is close to the main bus and train stations and therefore completely removed from the otherwise content-rich city centre, but it is one of the more recognised and visited attractions precisely because of its rich and varied content and appearance. A little further away from the most visited part of the city centre are Špica, also known to residents and local visitors as the Ljubljana Beach, and Tivoli Castle, located in a slightly remote part of Tivoli Park, the largest green space, which extends almost all the way to the city centre. These and the other alternative attractions considered in the survey are not as well targeted and strongly promoted, and they are more distant in space both from each other and from the old centre. Both factors have strong impact on their visibility and the likelihood of tourists visiting them. This is particularly evident in the case of the Barje Golf Club, the Tobačna Cultural Centre, the Fužine Castle, the Kino Šiška and some of the other least-recognised and least-visited attractions that are not located in the Centre district.

6 Spatial aspects of the development and promotion of urban tourism

**Figure 6.10**  
Recognition of Ljubljana's main tourist attractions (%)



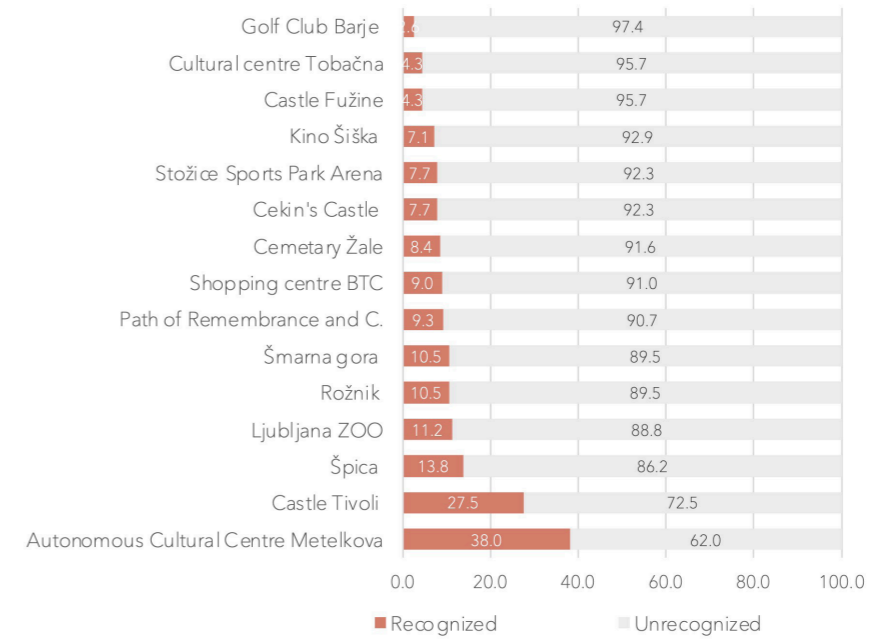
**Figure 6.11**  
Percentage of tourists who have visited, plan to visit or have no intention to visit Ljubljana's main attractions (%)



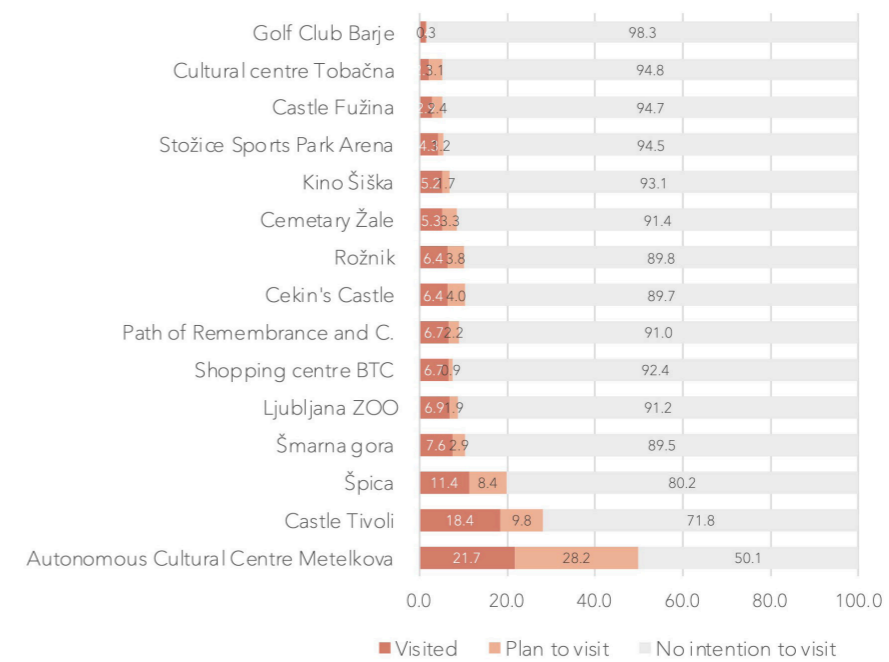
Urban Tourism in Slovenia: Characteristics and Governance

Section B

**Figure 6.12**  
Recognition of alternative tourist attractions in Ljubljana (%)



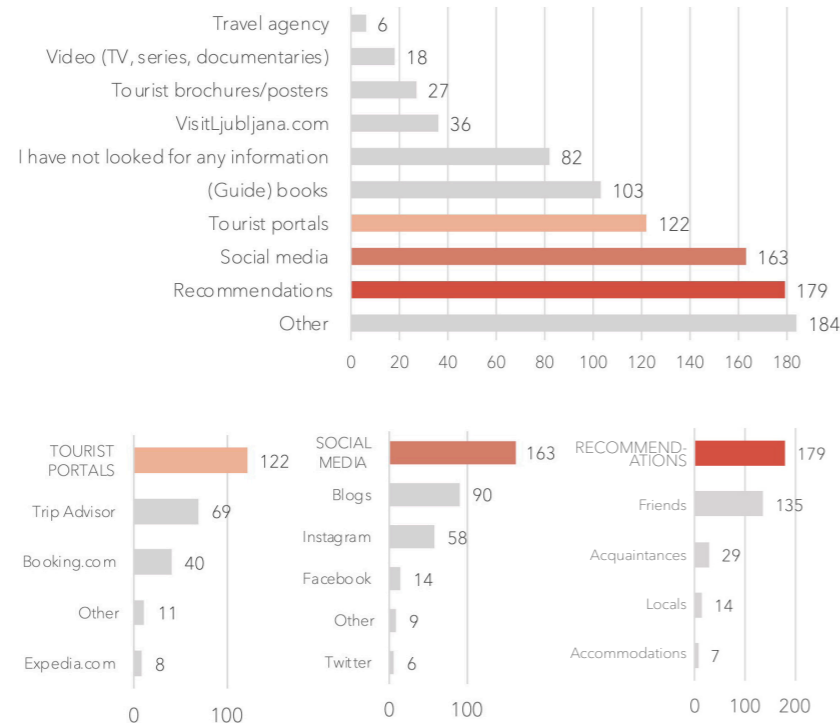
**Figure 6.13**  
Percentage of tourists who have visited, plan to visit or have no intention to visit Ljubljana's alternative attractions (%)



6.6.2 Sources of information

In examining the recognition of attractions and the decisions made by tourists to visit them, we were also interested in the information sources used by tourists to enquire about the destinations they visit. The results of the survey we carried out in Ljubljana showed that tourists most often find out more about the city through recommendations from friends and from social media (especially blogs and tourist portals, and among which Trip Advisor stood out) (Figure 6.14). Interestingly, the least used sources of information were travel agencies, various video content, tourist brochures and, more surprisingly, the official Visit Ljubljana website, which was used by only a third of respondents. It is important to note that the different sources of information do not affect the existing spatial distribution of the offers, but they do affect its visitors' numbers and recognition. The review and comparison of the promotion of individual attractions in printed guidebooks and online guides in the second part of this chapter showed that printed guidebooks contain more information, while the advantage of online guides lies in the possibility of quickly updating the information and thus changing the flow of promotion. Regardless of this, both sources of information like other promotional channels present similar tourist attractions. Recommendations from friends, blogs and Trip Advisor are highly influenced by promotional channel of Ljubljana Tourism, which determines the distribution of the offers in the area.

Figure 6.14 Sources of information used by tourists, the charts below shows in more detail which tourist portals, social media and recommendations were used by tourists



6.6.3 Routes travelled

The completed surveys of tourists in Ljubljana were mapped in the QGIS environment, with all the routes plotted and graphically processed to obtain a map of the density of completed routes. Similar to previous spatial and graphical analysis, this showed an increased concentration of tourism in city centre. In Ljubljana (Figure 6.15), tourists move most along the Ljubljanica River, on the paths to the Ljubljana Castle, and along the streets of the Old Town. Outside these areas, walking through Tivoli, to Metelkova and to Špica is also popular. Longer trips out of the city centre were made mainly because of their location of accommodation, but some tourists also went to the Zoo, the Žale cemetery and the BTC shopping centre. The analysis suggests that tourists are overwhelmingly confined to the city centre, and we assume that they are less successfully motivated by city tourism managers or stakeholders to visit other districts of the city.



Figure 6.15 Cartographic representation of the routes taken by tourists in Ljubljana

The map of the routes taken is consistent with the results pertaining to the recognition of, and visits to, main and alternative attractions. Thus, the routes were made where the most recognised and visited attractions were also located, e.g. the Tromostovje, Prešeren Square, Ljubljana Castle and the Dragon Bridge. Open spaces such as Congress Square, Tivoli and the Cathedral were slightly less recognised and visited, while individual museums and cultural institutions were among the least recognised and visited, despite their classical roles as cultural attractions in the city. The latter are part of the narrower city centre, but not necessarily the Old Town, which is where a majority of the most promoted attractions are located and where the tourist flow is concentrated.

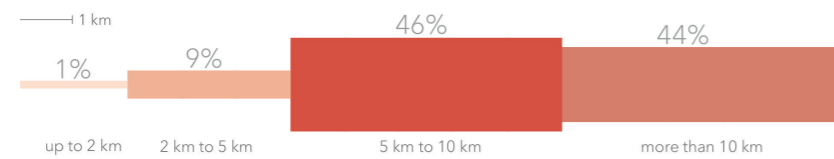


#### 6.6.4 Length of routes taken in an urban destination

Although Ljubljana and Maribor are relatively small city destinations, which predominantly focus their promotional activities on the (two) inner cities, tourists obviously travel longer distances within the cities which can be covered in about half an hour with basic knowledge of the destination. Tourists told us that in urban destinations, 10% of tourists typically walk up to five kilometres in a day, and almost half of tourists (46%) walk between five and ten kilometres, over 40% walk more than ten kilometres during their visits (Figure 6.16). These tourists are mainly those who are not only interested in visiting the city centres, but also wish to experience city life outside the city centre.

Figure 6.16

Daily distance typically covered by a tourist walking in an urban destination



#### 6.7 Conclusion

There are different approaches to analysing the presence and development of tourism in urban areas. In this chapter, we have graphically presented the distribution of tourism infrastructure and the frequency of promotion of individual tourist attractions, and based on a survey of tourists, we have examined the recognition of, and visits to, individual attractions in the destinations and mapped the tourist routes taken. The analysis showed that all the selected Central European cities have a high concentration of tourist infrastructure, offers and attractions in or close to the historic part of their respective city centres; a consequence also of their geomorphological features, urban design and historical development.

The examples of Ljubljana and Maribor, where we looked in more detail at the spatial context of tourism in the two cities, once again confirmed the thesis that urban tourism is (too) concentrated in old city centre areas. The location of catering establishments coincides with the promotion of tourism offers, and within these two cities they are, developed in the areas between the river banks and the major urban parks and green spaces. Accommodation establishments (mostly hotels) are also found in and around this area. Private accommodations rented out on sharing economy platforms (e.g. Airbnb) are more numerous than traditional accommodation; and, due to their nature - mostly individual units - spatially more dispersed over the wider urban areas. The concentration of tourist flows is further supported by the evaluation of the offers publicised through different channels; as the best rated providers are most often found in a smaller area of the two city centres. For example, we have seen from tourist satisfaction ratings (Trip Advisor) that Ljubljana, as a more developed and more visited destination, has a higher number of feedbacks and also better service ratings than Maribor. In both

cities, the most interesting tourist areas have the highest number of ratings, and these are also the best rated; majority of providers have a very good or excellent rating.

Cities use different promotional channels to reach different types of potential visitors when it comes to destination development. A comparative analysis of the official websites of the 10 cities shows that similar themes (history, architecture, etc.) are represented, and that they are mainly related to cultural tourism. While green and open urban spaces have not traditionally been ranked among the key attractions of destinations, the analysis of the top 10 attractions shows that they are being promoted by an increasing number of cities, including Ljubljana and Maribor. Events are the least prominent aspect in these lists, as they are in principle only of interest to visitors who are in the destination when they are held. The mapping of attractions according to their distance from town halls shows a remarkable concentration of the most promoted tourist attractions in or around the (historic) city centre, with the vast majority of them within two kilometres of the Town Halls. Some cities, such as Bratislava, Zurich, Graz and Maribor, even have the majority of their attractions within a 600m radius of their Town Halls. In such instances, tourists can hardly be expected to visit other parts of the (given) city.

A more detailed analysis of the promotion of Ljubljana and Maribor in printed and online tourist guides shows that the cities promote similar types of tourist attractions. The latter - regardless of the form of promotion - are often repeated and, as in the selected Central European cities, are concentrated in city centres. Thus, the promotion itself tends to emphasise attractions that are centrally located and more easily accessible to tourists. If more attractions outside city centres were added to the printed and online guides and promoted in an innovative way, a partial reorientation of tourist flows could be expected; a process that would also influence the development of the tourist infrastructure and the urban fabric of the two cities.

The spatial distribution of infrastructure, services and tourism promotion in cities is further reflected in tourist behaviour. This is confirmed by the analysis of the recognition of, and visits to, attractions and the analysis of tourist routes. Here, we have only shown these in more detail with regard to Ljubljana. The tourist itineraries, as shown by the results of the previous analysis, further confirm that tourists mostly or almost exclusively stay and move around in the narrower area of Ljubljana's city centre. It is also where the most promoted attractions, identified on websites, and in printed and online guides are sited. These are also the same attractions that are most recognised and visited by tourists. Promotion is, therefore, one of the most powerful tools for informing and guiding tourists. It is a tool for directing tourist flows and (unfortunately) also a factor for centralising tourist offers in the urban centres of selected cities, including Ljubljana and Maribor. Although both city centres are already relatively touristised (Ljubljana more so than Maribor), their

existing urban structures restrict the outward expansion of tourist offers and flows from the two city centres whilst also hindering, due to their, spatial constraints, the development of new tourism infrastructure in the two cities' wider area. In the further development and promotion of tourism, it is therefore essential to pay more attention to the spatial dimension of tourism in cities, and to target tourism towards whole city areas so as to mitigate against the emergence of overtourism in narrower urban centres.

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## Chapter 7

### Limits of urban tourism in Ljubljana: the views of different social groups

Matjaž Uršič





## 7.1 Introduction

City managers, the state, other national and local actors, and interest groups in Slovenia are often aware of the importance of tourism and the development potential it brings to urban areas. At the same time, they often try to use the potential of tourism in ways that are predominantly consistent with economic needs, while social components are only briefly mentioned in plans. From this perspective, areas that contain various forms of potentially exploitable 'tourism capital' (e.g. physical cultural heritage, distinct natural features and so on) try to be prepared and to develop as forms of a scientific-cultural curiosity that will attract visitors, consumers, and investors. In accordance with the processes of identification of suitable tourism capital, cities not only initiate processes of protection for specific locations with such potential, but also adapt and change them in ways that are congruent with the standards that apply in global tourism. Urry (1995) states that by resorting to the principle of consumption, cities often try to reinterpret local cultures in order to make them more attractive to global flows of people and capital. For example, many European cities boast historical or cultural quarters, streets and areas with medieval, baroque, and art nouveau architecture, which are legally protected as important parts of their cultural heritage. During various phases of the protection of this architecture and historical urban design, new processes appear that try to modify their original use and the aesthetic-symbolic characteristics of these spaces. Often, they are replaced by more socially sterile environments that exclude locally specific social practices, rituals, and events which possess strong symbolic importance for residents. The way in which the process of tourism development within cities is carried out can have a significant impact on the organization and functioning of local spaces. On the one hand, city districts, historic buildings, and streets might be able to retain parts of their original "material" value in the form of ambient, aesthetic, and architectural features. On the other hand, during the process of adaptation to tourist use such places can lose part of their "intangible" or immaterial value; that which is represented by the local population, various segments of spatial users, their social networks, informal events, habits, knowledge and other spatial practices (Thornton, 1997; Uršič and Imai, 2020).

This chapter discusses the process by which urban areas undergo touristic transformation, and the role that touristically important areas play in the further development of cities, regions, and the country. More specifically, this chapter analyses the impact of urban tourism development from the perspective of Ljubljana's residents and visitors. Ljubljana has in the last period transitioned to an area heavily burdened by tourists (data show a large increase in tourist overnight stays - from 841,220 in 2010 to 2,227,669 in 2019 (SURS, 2022)). It should be noted that urban transformation based on tourism can also indicate harmful

processes of city 'impoverishment' i.e. the homogenization of activities in touristic areas. In extreme cases, such processes lead to processes of urban "gentrification" (Smith, 1996; Hamnett, 1984; Downs, 1981), whereby larger population movements and city-building activities occur due to increases in living costs, rents, reductions in the functionality of public services, and so on. In our analysis, we particularly focus on the effects of tourism development from the perspective of various users of urban areas. In doing so, we limit ourselves to the 'quality' rather than the 'quantity' of the effects of tourism development and analyse how tourism has changed the socio-cultural basis of urban activities in Ljubljana and what this means for the long-term development of the city.

One of the key dilemmas of the city's tourist development relates to the issue of establishing appropriate relationships between the processes of commodification, upgrading or development of services, and the protection of historical heritage and the heterogeneous socio-cultural character of urban areas. In this context we discuss how to find the right balance between the interests of tourism developers and other heterogeneous actors, and involved stakeholders without reducing the long-term development capacity of urban areas. The current conditions of the postmodern, globalized environment in which cities are literally competing for resources, suitable labour and capital, make this task even more difficult. Nevertheless, this chapter tries to give some starting points about possible approaches to tourism development in Slovenian cities, and in doing so, integrates economic, social and cultural aspects in order to find guidelines for an optimal solution.

## 7.2 Developing tourism on the basis of material or immaterial cultural assets?

Tourism can be described as a form of individual necessity, a strong desire to be physically present in a certain place that helps the individual to gain experiences that are radically different from their everyday routine. Seen from this perspective, tourism is based on the certain 'exceptionality' of spaces; this makes the selected spaces a rare commodity. Being "there" is the key motto of tourist agencies, and they base for visiting a certain tourist destination precisely on "compulsion to be close" (Urry, 2001, p. 4), i.e. they highlight the importance of a direct, immediate experience. A tourist should therefore actually visit the location if he wants to gain an authentic experience that will move him, at least for a short time, to a different reality from that which he inhabits as part of the everyday life of his home environment. Exceptional spaces that tear us out of routinized everyday life are usually geographically and ontologically distant from our work and living spaces. These unique "spaces of enjoyment and experience" (Urry, 2001, p. 4) are economically important locations and attract a large number of visitors. Local communities in different parts of the world are becoming more and more aware of the need to possess some form of spatial exceptionality and are, as a result, trying to raise their level of tourist offers by emphasizing their uniqueness, and authenticity in confront to other places.

In tourism, the exceptionality of a place is often associated with authenticity, or the authenticity of the experience i.e. something that cannot be experienced elsewhere due to the offerings specific socio-cultural, historical and physical structure. It should be emphasized here that authenticity is not a static category, but a dynamic concept that is formed over and over again. Many places compete with each other in offering cultural specialties and attractions, and in doing so, they often emphasize historically completely insignificant local characteristics or even re-design, or re-make historical artefacts and events to attract visitors. A good example of such a re-creation of authenticity are the many renovations and reconstructions of city centres that have occurred through the use of neoclassical architectural elements, (see Figures 7.1 and 7.2, which represent the renovation of the city centre of Skopje (De Launey, 2014)). In many cases, it is a literal "reconstruction of ethnicity" or "staged authenticity" (MacCannell, 1999, p. 91). The growing number of such artificial and planned spatial organizations which are focused on spectator (tourist) gaze is becoming an important economic factor that directs the development of many cities and even countries. The spectacle has become part of the tourist industry and is an important element when trying to recreate appealing ambient designs that are intended to attract as many people as possible.

The spatial organization of perception is complemented by the concept of "urban scenery" (Hočevar, 2000, p. 24). Viewed ideally, "sceneries at the level of the system and in the context of the localization of network flows have different representational functions with a predominantly (transnational) economic background. Therefore, their distinctness (difference) in comparison with the sceneries of other cities is decisive" (Hočevar, 2000, p. 24). In other words, cities are increasingly looking for their unique distinguishing characteristics and seek, by emphasizing their sceneries and the spatial organization of perception, to show their comparative advantage in relation to other cities. At the same time, cities are aware that new technologies accelerate the processes of time-space densification, whereby information is accessible to everyone. Consequently they try to build their offers on uniqueness; a concept that should capture or attract as many people as possible, at least for a short time. Locations in the city centre of Ljubljana and some other Slovenian cities that have elements of cultural heritage are typical examples that have exceptional potential to increase the attractiveness of the city and to bring to it new visitors and capital. Through so doing, the development of tourism is further promoted (see Figures 7.3 and 7.4). At the same time, it should be emphasized that the construction of a successful spatial organization of perception is a risky business, as it often has the opposite effect to that which is desired. The production of spaces intended to attract as many people as possible often requires major interventions in urban centres or the wider area of a city. With interventions in space, the formation of new social relations simultaneously occurs; this can have either positive or negative effects on the development of a city.



**Figures 7.1 and 7.2**  
Renovation display of  
the city centre in Skopje  
(Author: Jörn Harfst)

The need to produce exceptional spaces has encouraged many cities to create special tourist environments and to transform existing urban areas so as to emphasize their touristic value. This has, at the same time, influenced the organization of services and the daily life of various user groups within such areas. From this point of view, the renovation of Ljubljana's city centre has combined new urban, architectural, functional and content elements with different results. The dimension of the protected 'material' value or physical cultural heritage is relatively well represented in the existing city centre renewal plan. On the other hand, the role of 'intangible' values present in the area is rather vague and undefined. Indeed, Bourdieu (1986) thinks that "cultural capital" can be found in various forms and can also be manifested through intangible values. According to Bourdieu, cultural capital exists in an "objectified" as well as "embodied and institutionalized state" (1986, pp. 248-250).



Objectified cultural capital is represented by material things, i.e. artefacts, works of art or, in the case of a city centre, specific historical features of the urban-architectural heritage of the area. Cultural heritage, represented in physical form, can be translated into economic capital and today represents an established form of tourism and the cultural offer of cities. The other two dimensions of cultural capital are much more closely related to the notion of intangible value. Cultural capital in its embodied form is represented by an individual with his/her personality characteristics and way of thinking. These originate from a certain environment and are formed through processes of socialization. Embodied cultural capital is related to institutionalized cultural capital, and is represented by an individual's knowledge and educational qualifications, i.e. stocks of knowledge, qualifications, experience, and information accumulated in the process of education, and operates in specific environments and institutions.

The concept of cultural capital raises questions about the possibility of the existence of special, more complex forms of intangible cultural values in certain areas of the city. Until recently these have been primarily understood as locations with distinct physical, visual, ambient and architectural cultural values. Taking into consideration the concept of multidimensional intangible cultural capital one must ask whether in the area of the city centre of Ljubljana these forms of capital have been sufficiently preserved or protected. The preservation of new, perhaps still unrecognized local knowledge, creative potential and cultural and artistic content could be of exceptional importance in the process of further transformation of the area. This opens a question whether current tourist transformation of central city areas applied the right criteria, tools for identifying, measuring, and assessing the adequacy of intangible values, contents, and functional characteristics of locations?

#### Figures 7.3 and 7.4

Display of typical urban sceneries in Ljubljana  
(Author: Matjaž Uršič)



Do the evaluation tools tied to the evaluation of intangible values, produce data that is relevant to assessing the short-term and long-term effects of implemented changes to Ljubljana's urban environment. Evaluation tools that predominantly try to assess the capacity of multiplication of economic surpluses on tourism locations, seem to have the greatest weight at the moment. It is possible that, in the context of Ljubljana and other Slovenian cities, too much weight has been put on the rapid development of tourist activities, economic flow, instrumentalization of spaces, and the general commodification of the tourist offer. Due to these assumptions, we will examine different views and value orientations regarding the tourist offers of the city centre and try to present some overlooked socio-cultural highlights of the city. The purpose is to show whether there is a need for the development of different tourist offers, and to see whether development is possible through the use of different evaluation tools that are able to more appropriately evaluate the importance of local contents for the quality of life in the mentioned areas.

### 7.3 Analysing perception of urban tourism in Slovenia

The data included in the analysis of how various groups perceive the development of urban tourism in Slovenia originated from three surveys and are partially linked to the fifth chapter of this book, which deals with how to "measure the effects of urban tourism" (see Marot and Stubičar, 2022). In the first SPOT survey (Social and innovative platform for cultural tourism and its potential for strengthening Europeanization, Horizon 2020), the field sample included both 100 tourists in the city centre of Ljubljana (N = 100; 85 foreign/15 domestic tourists) as well as 300 inhabitants of Ljubljana outside the city centre (N = 300; around 80% of them live within a radius of up to 4 km from the city centre) and additionally 40 employees in companies engaged in tourism (see Klepej et al., 2021 etc.). A series of semi-structured interviews with a specially prepared questionnaire was conducted with each of the mentioned groups. In the second research, which was carried out as part of the MESTUR project in 2021 (Analysis and management of the spatial and social effects of urban tourism in the case of Ljubljana, Graz and Maribor, 2019-2022, ARRS), 600 tourists answered a semi-structured questionnaire (N = 600; of which approximately 85% are foreign tourists) (see Marot et al., 2021). The third longitudinal research Spatial and Environmental Values 2004-2018 survey (Hočevár et al., 2018) complemented the first two surveys. The data in the research from 2018 was extensive and included 2,000 Slovenian residents (N = 2,000; the sample was weighted and stratified by 12 regions and 6 settlement size types (these include urban, suburban and rural areas).

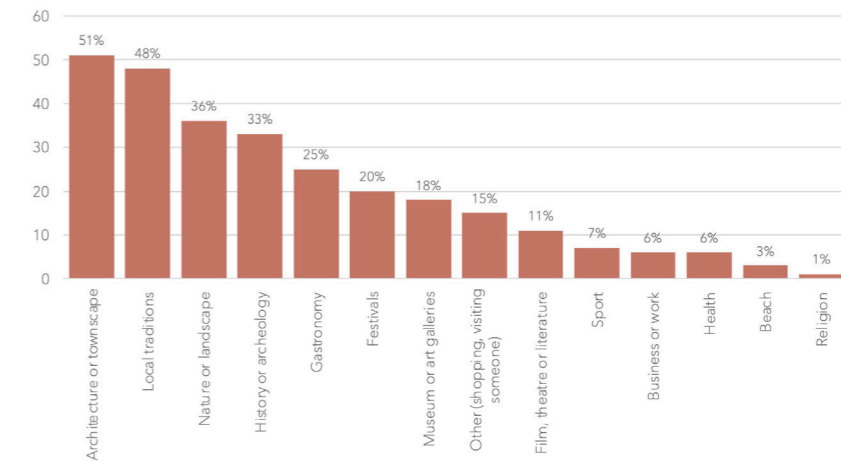
The analysis of the data from the three surveys enabled insights to be gained into how different groups of users see urban tourist services and facilities. The analysis focused especially on the city centre of Ljubljana, which represented the key (micro) unit of study from which in-

dividual broader (macro) trends were extrapolated with regard to the development of urban tourism in Slovenia. To a lesser extent, we will occasionally rely on data that covers broader samples of the population in Slovenia and will supplement the micro location data. It is the possibility of combining and supplementing data from various sources that enables additional dimensions to be added to analysis of urban tourism. Although we cannot talk about the complete consistency of the data due to the different data collection processes (in terms of time periods, different groups of interviewers, and slightly different field boundaries etc.) it still makes sense to compare the data to increase the interpretation capabilities of analysis.

### 7.3.1 Tourists' opinions of the urban tourism offers in Ljubljana

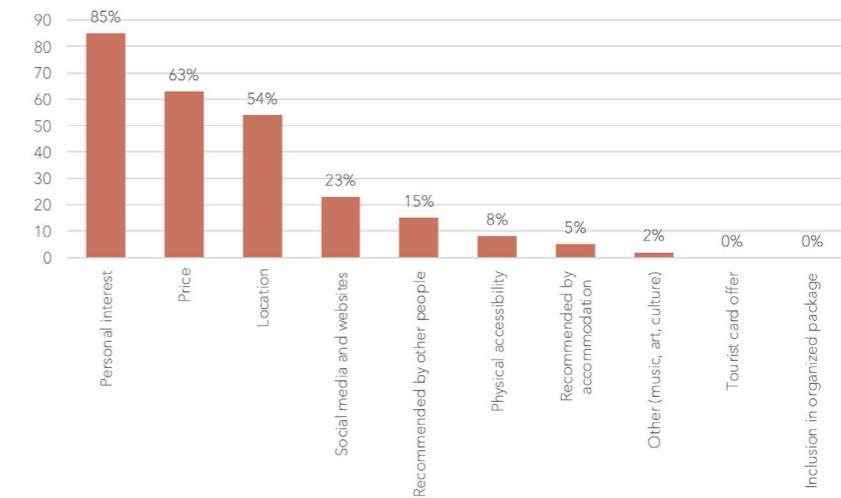
In the research Klepej et al. (2021) presented several sets of data regarding how tourists perceive the tourist offer in the city centre of Ljubljana. Different data is used to identify how they perceive the heterogeneity of the offer in Ljubljana. From the presented data it is possible to extrapolate the motives and reasons for tourists for visiting Ljubljana (see Figures 7.5 and 7.6) and their interest in and satisfaction with various aspects of its cultural tourism offers in Ljubljana (see Figures 7.7 and 7.8).

While motives focus on the aspect of attractiveness and the internal motivations of the individual, reasons are related to the practical implementation of tourist trips and are also connected with so-called external stimuli or carry-out factors. The data show that the key motives for a tourist visiting Ljubljana are features related to specific material cultural and historical heritage of the city centre. For example, the 'the beautiful city centre with its corresponding architecture and compact streets'. Other features complement these primary motives and represent important secondary aspects that upgrade the tourist offer of the city centre. Among reasons for visiting, it is important to highlight the aspects of personal interests and the price and the location of Ljubljana, which all significantly contribute to the choice of Ljubljana as a tourist destination. The location significantly complements the data in Figure 7.6, as well as the data which shows that a significant proportion of tourists (according to research by Klepej et al., 2021, approximately one third) combine their visits to Ljubljana with a visit to other foreign destinations in the vicinity (for example locations in Italy, Croatia, Austria and Hungary). In this context, for approximately a third of the tourists questioned, Ljubljana is just one stop on a longer tourist route. This partially reduces the importance of Ljubljana as a primary tourist destination. In the context of the analysis of heterogeneity of tourist offers, special attention should be paid to tourists' (dis)satisfaction with aspects of the cultural tourism offers available in Ljubljana (see Figures 7.7 and 7.8).



**Figure 7.5**

Key motives for a tourist visit to Ljubljana (Source: Klepej et al., 2021, p. 28)



**Figure 7.6**

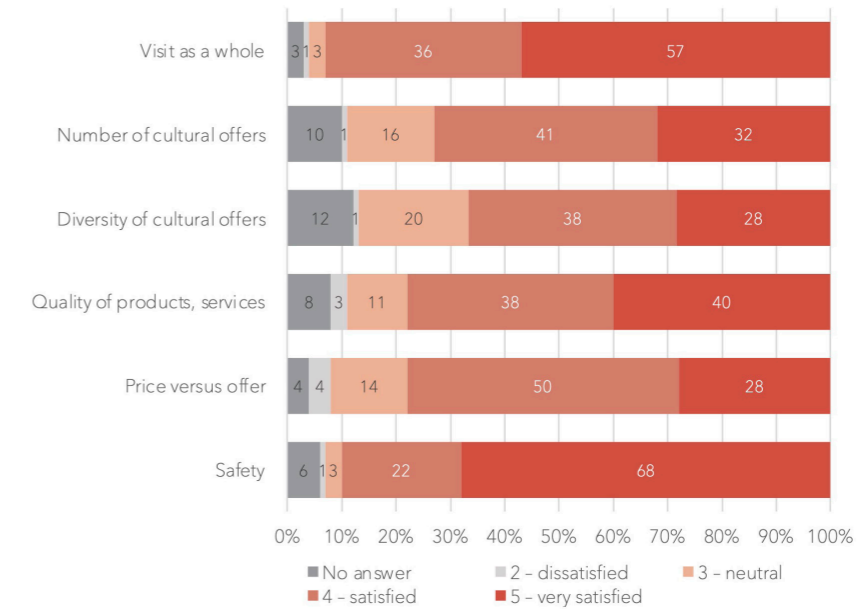
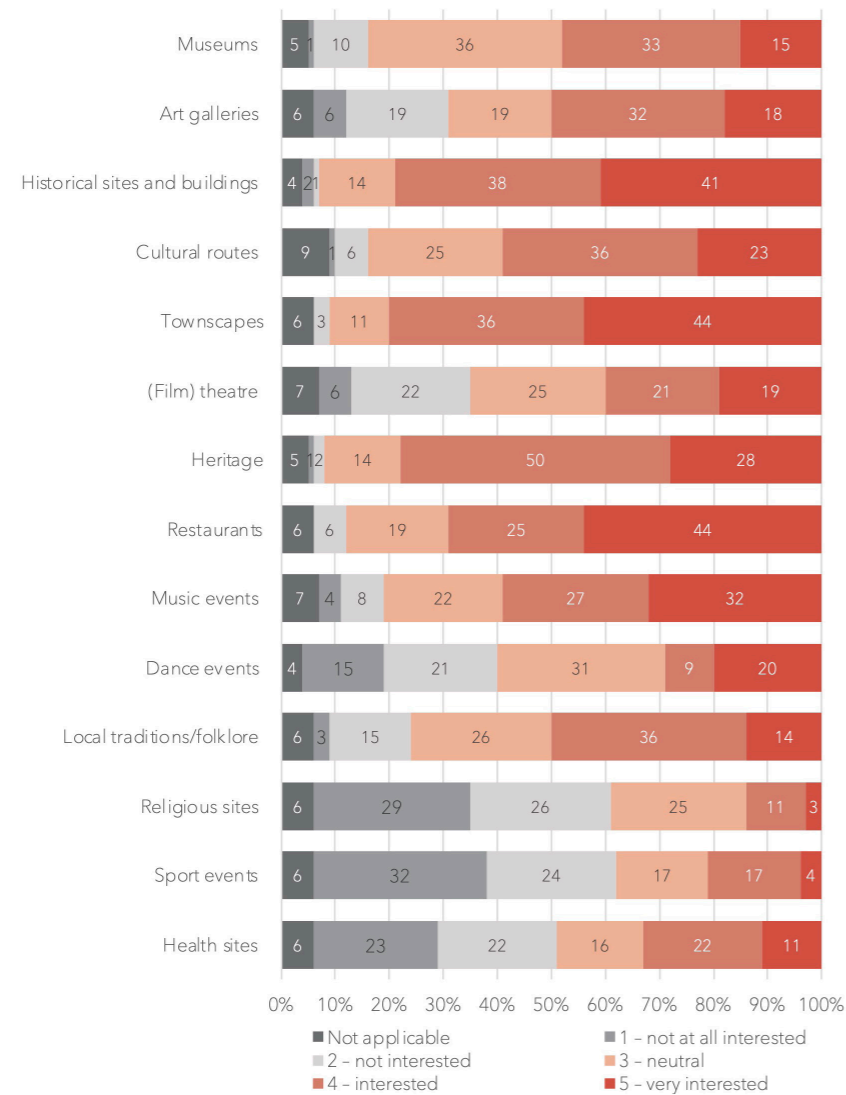
Reasons for a tourist visit to Ljubljana (Source: Klepej et al., 2021, p. 36)

The data reveals certain gaps in Ljubljana's tourism offer. Despite general satisfaction with visiting Ljubljana, tourists also detect elements of mediocrity with regards to Ljubljana's cultural offers (approximately one fifth of the interviewees were in this category (Klepej et al., 2021). In Figure 7.8, among the individual dimensions of cultural tourism that are rated somewhat worse, the most prominent are "the diversity of cultural offers" and "the (small) volume of cultural offers" of Ljubljana. In order to determine the scope and importance of the slightly lower evaluation of the cultural diversity offers of Ljubljana, this data must be supplemented with the data from Figure 7.7, which shows the most interesting cultural offers according to individual aspects of the city's cultural tourism. A review of the data shows that the most interesting aspects of this are related to material (static or in situ) characteristics, and mainly include built cultural heritage, with other aspects of the cultural diversity offer being less attractive to tourists. The combination of data from Figures 7.7 and 7.8 allows us to interpret tourists' expectations regarding Ljubljana's tourist offers and to contrast these expectations with what they 'actually got' when they visited. A majority of tourists in Ljubljana were satisfied with the tourist offers, as they mostly expected



a well-preserved/renovated city centre with an appropriately designed architectural heritage - and that is what they get. However, higher expectations with regards to the greater heterogeneity of the cultural offers (especially in terms of intangible heritage and culture) are, from the view of foreign tourist, not realized and are characterized as "average at best" by one fifth of tourists. It follows that Ljubljana's tourism cultural offers in the current context are relatively limited and do not show development potential with regard to planning more complex tourism strategies that would enable upgraded services or new forms of sustainable tourism. Current tourism in Ljubljana is mainly based on the exploitation of current potentials which originates from the city's material cultural and historical heritage which has been accumulated over hundreds of years.

**Figure 7.7**  
Tourists' interest in specific aspects of cultural tourism in Ljubljana by individual category (Source: Klepej et al., 2021, p. 35)



**Figure 7.8**  
Satisfaction with aspects of cultural tourism offer in Ljubljana in relation to other influencing factors (Source: Klepej et al., 2021, p. 34)

**7.3.2 Analysis of the differential advantages of Ljubljana's urban tourism compared to other cities - overlooked aspects of Ljubljana's urban tourism offers**

Analysis of the differential advantages of Ljubljana's urban tourism compared to other cities provides similar findings as other data (see Klepej et al., 2021). They point to the relatively limited offer of urban tourism in Ljubljana. In the framework of existent research (ie Marot et al. 2021), the key dimensions of urban tourism were first analysed via a sample of 600 tourists. In doing so, they were first asked if they could describe the key features of Ljubljana in a few words. Thereafter, they were asked to briefly describe why they chose Ljubljana as the main destination of the trip. Subsequent to this, respondents were asked to describe what made Ljubljana different to other cities.

Enabling the respondents to freely formulate answers, this type of data collection resulted in an extensive set of descriptions of different dimensions of urban tourism, which had to be filtered via subsequent analysis into individual categories according to individual phrases and word structure. To analyse the mentioned data, we used "pragmatic text analysis" (Verschuere, 1995), whereby we explained the analysed dimensions of urban tourism by individual categories on the basis of semiotic connections in sentences. For these purposes, we used Text-STAT 2.9c software tool for text analysis (FUB, 2021) and, based on the frequency of individual words and phrases, came to form individual categories of answers that were important for our analysis. In doing so, we focused in particular on differences between the individual dimensions of the tourism characteristics of Ljubljana in relation to the questions posed. The data showed the following relationships between individual categories of answers according to the questions asked.

**Table 7.1**

Distribution of the descriptive categories of Ljubljana by individual descriptors (Source: Marot et al., 2021)

No.	Name of category	Descriptors (keywords in a category)	No. of citations
1	CHARM	Beautiful + friendly + cozy + charming + lovely + atmosphere + cute + pretty + pleasant + picturesque)	413
2	SMALLNESS	Small + little + compact + concentrated)	126
3	GREEN SYSTEM (NATURE)	Green + nature + water + greener)	118
4	CALMNESS	Quiet + peaceful + relaxed + calm + serenity)	112
5	MATERIAL (CULTURAL-HISTORICAL) HERITAGE	Architecture + historical + old + buildings + historic + history + Castle + Medieval + monuments)	99
6	CLEANLINESS	Clean	84
7	GASTRONOMY	Food + bars + restaurants	44

For the first open question: "How would you describe Ljubljana in a few words?" a set of most common descriptive categories were identified after the text analysis. Table 7.1 lists the categories that were identified. It should be noted that a significantly larger number of categories were identified in the analysis, but due to their low frequency they were not included in more detailed analysis. In the more detailed analysis, we only included the seven most frequently mentioned categories.

In tourists' descriptions of Ljubljana, the categories "charm" and "cuteness" with regard to the city centre stood out extremely strongly. This description also as an important register in a number of other answers that referred to the peculiarities and advantages of Ljubljana. The outstanding charm and cuteness of Ljubljana can be justified by the specific structure of the city centre and its associated material cultural heritage. The ambient effect of material cultural heritage further relates to other important categories of descriptions and include the city's small size, green system, cleanliness and, in the final, third stage of mentions, also other accompanying service offerings such as gastronomy. The combination of charm associated with a specific, relatively green system, which allows for nice, calm walks with the occasional use of accompanying catering services, seems to most tourists to be a key part of the description of Ljubljana (see Figures 7.9 and 7.10). Charm and cuteness as key descriptors of Ljubljana is not surprising, as many authors state that cuteness is "a strong affective register, the social proliferation of which has been on the rise since the turn of the millennium" (Dale et al., 2017). The culture of cuteness is also often associated with the so-called 'kawaii culture' (Harris, 2001; Carpi et al., 2012; Ohkura, 2019) and the aesthetics of mannerism, excessive affection for things, people, food, clothes and also spaces that evoke empathy, and emotional stimuli in individuals. Until recently, the culture of cuteness, which is extremely important for the operation of the tourism sector, was too often perceived as a trivial, superficial category for the study of tourism offers. Even in the context of Ljubljana, the culture of cuteness was perceived as a secondary, self-evident component

of the city centre, which should include a wider range of tourist offers. With regard to Ljubljana, the presence of key attractive factors such as charm and cuteness is often taken for granted. They represent very complex factors that connect a multitude of different characteristics which co-create the conditions for the aforementioned descriptions of the city. This sensible and also vulnerable structure is crucial for establishing the foundations of cuteness and charm in the city. This was also reflected in the answers to the second question, where we asked tourists: "Why did you choose Ljubljana as a travel destination?" (see Table 7.2).

**Figure 7.9**

Romantic Ljubljana - the charm of Ljubljana as an attractive factor in tourism (Author: Mankica Kranjec, photo library Ljubljana Tourism, 2022)

**Figure 7.10**

A walk through Old Ljubljana - the charm of Ljubljana as an attractive factor in tourism (Author: Dunja Wedam, photo library Ljubljana Tourism, 2022)

The answers show that Ljubljana is interesting for tourists especially as a novelty, a new form of touristic unexplored location that needs to be seen. In this case, a visit to Ljubljana is connected in particular to the strongly observed charm and particular geo-location that allows the visitor to combine their visit to Ljubljana with other locations, places, cities or countries in the vicinity. The remaining descriptors had a relatively low frequency of mention and there are large differences between them in Table 7.2. Nevertheless, we included them in the list because



they connect or complement and explain the higher positioned three key descriptors in the question. Charm or cuteness as a key dimension appeared again in the third question, in which tourists were asked: "What do you think makes Ljubljana different compared to other cities?" (see Table 7.3).

**Table 7.2**

Reasons and motives for choosing Ljubljana as a travel destination (Source: Marot et al., 2021)

No.	Name of category	Descriptors (keywords in a category)	No. of citations
1	NOVELTY, NEW DESTINATION	Slovenia + new + capital city + interesting + EU	158
2	CHARM	Nice + good + heard + beautiful + small	86
3	TRANSIT POSSIBILITIES DUE TO LOCATION	Croatia + Austria + Zagreb + Budapest + Germany + Italy + Trieste + Vienna	71
4	STARTING POINT FOR THE REST OF SLOVENIA	Bled + near + Triglav + park + hiking	46
5	VISITING FRIENDS AND FAMILY	Friends + visiting	43
6	GREEN SYSTEM (NATURE)	Nature + green	35
7	MATERIAL (CULTURAL-HISTORICAL) HERITAGE	Architecture + city center	10

**Table 7.3**

Categories of perceptions of Ljubljana as a comparative travel destination (Source: Marot et al., 2021)

No.	Name of category	Descriptors (keywords in a category)	No. of citations
1	CHARM	Nice + river + vibe + interesting, lively + places + comfortable + charming + polite + pretty	178
2	GREEN SYSTEM (NATURE)	Green + nature + greener + water	160
3	PEDESTRIAN FRIENDLY	Walkable + pedestrian + walk + walking + no cars + no traffic	152
4	SMALLNESS	Small + smaller + little + size + tiny	142
5	MATERIAL (CULTURAL-HISTORICAL) HERITAGE	Architecture + historical + old + compact + streets	118
6	CALMNESS	Quiet + calm + relaxed + peaceful + safe	118
7	CLEANLINESS	Clean + cleaner	86

The dominance of the charm category in tourist perceptions of the city centre shows the specificity of the structure of urban tourism in Ljubljana, and could be speculatively linked to the entire tourism offer of Slovenia. This structure is based on the characteristics of beautiful nature, greenery, safety, peace and cleanliness within the framework of the small and extremely dispersed settlement system of Slovenia. Along with the advantages of charm as a primary pull factor, it is also necessary to mention the limitations of this type of 'kawaii tourism'. Such a dominant mono-functional type of tourism is tied to very fragile, sensitive relationships and can quickly lose its attractiveness due to excessive tourism, or its overloading with similar homogeneous offers of service and activities. Ironically, it is precisely the crowds of tourists that are steadily but gradually undermining this romantic "tourist view" (Urry, 2001) of a calm, clean, charming, cute city centre (see Figure 7.11). If these categories represent the key surplus of the city's tourist offer and other categories like gastronomy, galleries, museums, collections and other cultural offers are to a lesser extent noticed just as supportive quality forms of offer, then it is difficult to speak of a branched, heterogeneous, unique, outstanding, long-term sustainable and resilient tourist offer in Ljubljana.

**Figure 7.11**

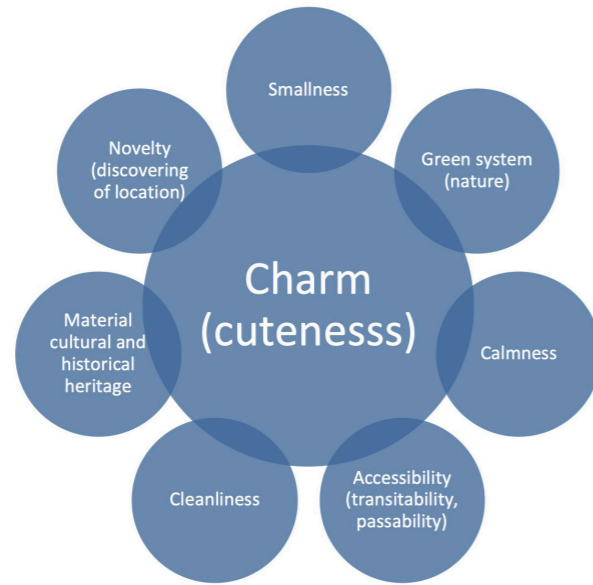
Charm as a combination of green system, small size and material historical heritage (Author: Andrej Tarfila, photo library Ljubljana Tourism, 2022)

Apart from rare exceptions (e.g. visiting friends and family), most descriptors of the tourist offers in Ljubljana were repeated again and again. Based on all the descriptors from Tables 7.1, 7.2 and 7.3, the following phrase could be compiled that illustrates Ljubljana key tourist characteristics: "Charming, cute, small, green, calm and clean Eastern European capital with a beautiful city centre and quick access to other nearby destinations." The phrase well captures the perceived key advantages as well as the current limited tourist potential of Ljubljana.



**Figure 7.12**

Connecting key descriptors of urban tourism in Ljubljana (Author: Matjaž Uršič)



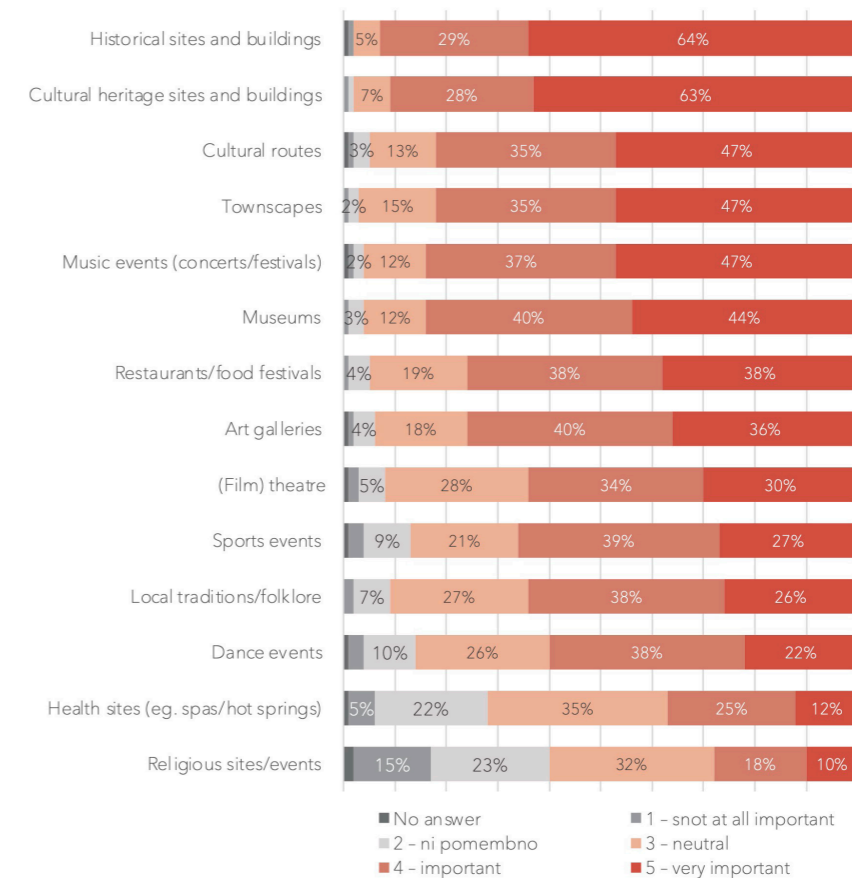
### 7.3.3 Residents' views on the tourist offer and development of Ljubljana

Data from the survey (Klepej et al., 2021) show that the city's residents have a relatively favourable view of the impact of tourism and tourist offers in Ljubljana. Approximately 42% of respondents in the survey were satisfied with the number of tourists in Ljubljana, and 17% were very satisfied. About 10% were dissatisfied with the number of tourists, and 3% were very dissatisfied. Despite this relatively positive attitude, it should be noted that in the context of Slovenia, - and before the outbreak of the covid-19 pandemic that significantly reduced the number of tourists - a trend of decreasing residents' satisfaction with the development of urban tourism was observed. For example, in the research of Hočevar et al. (2018; N = 1,000), about 42% (home town) and 45% (Slovenia) of the respondents answered yes when they were asked whether more space should be allocated for tourism in your place or in Slovenia, but a longitudinal comparison between the years 2004 and 2018 showed that support e decreased by 4% and 7%, respectively, during the said period.

Despite the gradual decline of support towards the development of tourism, existent research (Klepej et al., 2021; Marot et al., 2021; Hočevar et al., 2018) shows that residents still see the benefits of tourism. This can be seen from the data (Klepej et al. (2021)) which shows that services related to the development of tourism significantly complement other characteristics related to the quality of life in urban areas. In the research by Klepej et al. (2021), residents state that the services and features of Ljubljana's cultural and tourist offer are important or very important to them (see Figure 7.13).

Particularly important are live cultural events (concerts, festivals), which are noticeably more important to residents than to tourists. A similar importance of eventfulness is also observed in the research of Hočevar et

al. (2018), in which longitudinal data between 2004 and 2018 showed an increase in the importance of cultural events for local residents in relation to tourists. In response to the question: "Are cultural events mainly important for tourists, but not so much for the local population?", approximately 50% of residents expressed disagreement, and approximately 30% strongly disagreed in 2018. In 2004, both mentioned categories were approximately 4% higher. Similar conclusions can be reached when reviewing the added values of cultural tourism in Table 7.4, which were covered in the research by Klepej et al. (2021). This table is complemented by the data from Figure 7.14, in which the frequency of attendance at cultural events by the inhabitants of Ljubljana is displayed on the basis of the size and thickness of the words.

**Figure 7.13**

Importance of cultural attractions/locations/offers for the cultural offer of Ljubljana (Source: Klepej et al., 2021, p. 52)

**Table 7.4**

Added value of the cultural tourism for the city and its inhabitants (Klepej et al., 2021, p. 58)

	Most frequent answers	Least frequent answers
<b>General development</b>	Better promotion and recognisability of the city (16) Enriched gastronomy (12) Renovation projects and more respect for the local tradition and history (9)	Building renovations (1) Safer town (2)
<b>Economic development</b>	Employment opportunities (17) Richer local offer of services (9)	Higher prices of properties (1) Higher value of collected taxes (3)
<b>Tourism development</b>	Various cultural events (29) Increase in cultural offer (25)	Increase in visitor numbers (1) Promotion of local food (2)
<b>Social life</b>	Higher quality of life (11) Openness and friendliness of local inhabitants (10)	Increased Europeanisation (1) Broadening horizon (4)
<b>Spatial development</b>	Accessibility of the city (information, areas) (27) Diverse city (16) Walkable city (16)	Decreased quality of landscape (1) Closeness of the natural areas (2)

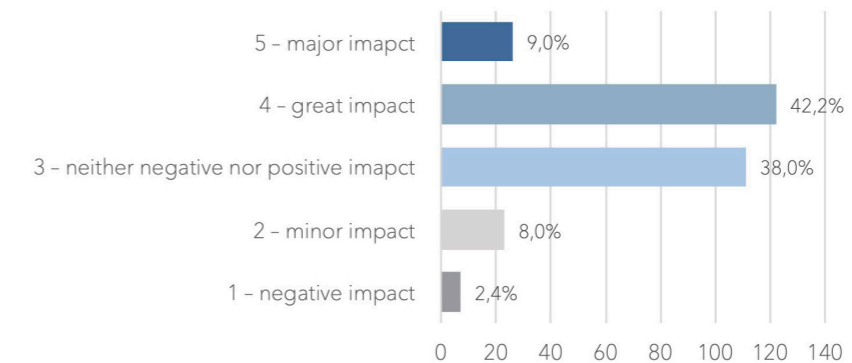
**Figure 7.14**

Frequency of attended cultural events by residents of Ljubljana (Source: Klepej et al., 2021, p. 50)



The inhabitants use the aforementioned offers in different ways to groups of tourists. As such, it is not surprising that the inhabitants of Ljubljana value the cultural events in Ljubljana significantly higher than groups of tourists do. In the case of Ljubljana, tourism events, i.e. events related to tourist services represent the base of the artificially re-created "urban scenery" (Hočevar, 2000). Ljubljana, due to its proverbial small size, cannot produce urban scenery in the same manner as large cities with millions of inhabitants. Due to this lack of urban volume the typical urban scenery, where events spontaneously occur in a more dynamic, sustainable and unplanned form, cannot be permanently produced (see e.g. Evans, 2001; Zuki, 2011; Urry, 1995). From this point of view, occasional artificial urban scenery, which is promoted by state and city authorities through the planning of events and activities in the city, represents a certain quality of cultural offer for inhabitants; as observed in the research data.

Despite these positive aspects of urban tourism, residents also noticed a number of negative impacts of tourism. Residents noticed the great influence of cultural tourism on the city centre, with 83.2% of respondents believing that cultural tourism has in some way influenced the functioning of the city. Also, a large proportion of them (about 80%) believed that urban tourism changed local traditions. Despite the relatively positive acceptance of the effects of tourism, it is not surprising that inhabitants notice the inconveniences that appear as a side effect of tourism activities (see Figure 7.15).



**Figure 7.15**

Inconveniences that occur as a side effect of tourist activities (Source: Klepej et al., 2021, p. 54)

The data shows that approximately half of the population notices a number of inconveniences associated with the development of cultural tourism. In doing so, they most often pointed out issues relating to noise, street parties, disrespect for rules, inappropriate handling of waste, and the like. Combining the beneficial and harmful effects of urban tourism creates a complex situation in the context of Slovenian cities. Research data shows that residents oscillate between supportive and critical opinions on urban tourism in Ljubljana. This suggests that, in the context of Slovenian tourism, we have not yet developed suitable tools for preparing long-term tourism strategies and even less for evaluating, studying and filtering the various effects of the development of urban tourism. In consequence, the lack of concurrent adequate tools may bring certain advantages but may also lower the quality of life of certain groups of inhabitants within Slovenian cities.

#### 7.4 Discussion - the complex balance between long-term and short-term effects when developing urban tourism

If we take Ljubljana as a typical example of the development of urban tourism in Slovenia, we can say that the collected data (Klepej et al., 2021; Marot et al. 2021 and Hočevar et al., 2018), show a very complex picture of Slovenian urban tourism. After the period of political-economic transition and the identification of interesting locations for the development of urban tourism, it seems that Slovenian cities have not been able to establish appropriate conditions that would indicate the upgrading of existing guidelines in urban tourism. More complex forms of urban tourism, which would build on a tourist offer that goes beyond the existing material features, based on either cultural-historical heritage or greenery (natural features), do not appear as an important player in the urban tourism offer for now. To illustrate this complexity of the situation, we can also use the presentation of the effects of the transformation of city centres by Dupagne and Dumont (2006), who, based on the analysis of a large number of historical heritage renovation projects in cities, present a complex combination of positive and negative effects of the renovation of individual urban areas. Ljubljana is going through a similar transformation, and it is possible to find many parallels between the effects they mention and the effects we are seeing and will potentially see in the future. Characteristics highlighted by Dupagne and Dumont (2006) were supplemented by the individual sets of characteristics that originate from the effects of physical renovation of Ljubljana for the needs of urban tourism and were identified in the research of Klepej et al. (2021) and Marot et al. (2021). The presented table 7.5 is therefore adapted on the basis of multidimensional data from various researches, which focus on the effects of the transformation of urban areas, and shows the possibilities and directions of the potential development of urban tourism.

Table 7.5 clearly shows the range of possible spatial effects based on development of urban tourism with all the advantages and disadvantages that this brings. The goal of any long-term oriented development is to optimize the relationship between the harmful and beneficial effects of urban tourism. In the Ljubljana context, individual beneficial and also harmful effects are mirrored, whereby it is difficult to notice systematic shifts in terms of faster optimization of relationships in favor of beneficial effects. In the post-independence period and especially in the pre-pandemic period, some centres of Slovenian cities experienced pronounced processes of 'touristification' in the sense of excessive emphasis on mass tourism, homogenization of functions and services for the needs of tourism development. In doing so, many temporary users and contents, programs, activities and services, which offered a range of cultural, artistic and social contents and perhaps represent an important element of the intangible cultural capital in the city, were neglected, turned away, marked as less important or even excluded from the tourist areas. Such types of intangible cultural capital can serve the needs of long-term revitalization of the city and especially help in sup-

port, upgrade of elements related to the development of the creative and cultural programs in cities. The high degree of heterogeneity, variety of venue bases, socio-cultural diversity is an important aspect of urban scenery that affects the development of local production, creative industries, consumption and also the future development of tourism.

During the process of renewal of central urban areas, more complex definitions of the city's content offer, heterogeneity and cultural capital were often ignored for various reasons. It is true that the processes of globalization and, in particular, the increasing competitiveness between cities, along with the demands for effective economic regeneration, require rapid renovation, supported by short-term and clearly visible effects in space. Nevertheless, at the same time, it should be noted that there are situations in which interest groups and investors are often not aware of the long-term consequences of a short-term and predominantly economically-oriented renovation strategy, which takes too little account of the various social aspects of renovation. During the renovation process, the protection and safeguarding focuses mainly on the characteristics of the historical heritage and consequently only on the physical protection of the objectified cultural capital, leaving out the elements of the non-materialized cultural capital. As a consequence, there may occur a reduction in the functional, social, service, content, cultural heterogeneity that has accumulated over a certain period of time, and the loss of potentials that already exist in the area. A lot of such examples have been evidenced in locations where the processes of "spectalization" (Debord, 1999) or "disneyfication" (Zukin, 1991) occur and the emphasis is on aesthetic and physical ambient qualities, while broader social connections and placement in the local context are lacking. Ljubljana is of course not an exception in this context and particularly worrisome are the experiences from several world cities (see e.g. Jacobs 1994; Zukin 1991, 1995; Featherstone, 1991) that show that the attempts to subsequently re-establish social and cultural heterogeneity in the area where the complete radical physical transformation or renovation already took place, are not completely successful. When attempts are made to reintegrate an appropriate mix of different socio-cultural elements into the renovated areas, the new urban structure usually does not support immediate close coexistence or mixing of different social groups like for example luxurious and cheap shopping areas, shops or interweaving high-profit (corporate) and non-profit socio-cultural activities. The collateral damage of such renovation projects can be manifested in spatial separation (segregation), adapted forms of zoning, gentrification processes, a general reduction of socio-cultural heterogeneity and in diminished long-term development potentials or "creative capacities" (Lazzaretti, 2012, p. 2).



**Table 7.5**

Possible effects of tourism transformation of urban areas (Sources: Dupagne and Dumont, 2006; Klepej et al., 2021; Marot et al., 2021)

Influences on the diversity of urban spaces	Impacts on urban cultural practices and spatial use	Impacts on urban economies
<b>BENEFICIAL aspects</b>		
Urban regeneration	Diversification, exchange of influences, identity	Jobs, financial resources
Greater concern for urban spaces	Preservation of local values and traditions	Creation of new jobs (additional employment)
High valuation of cultural heritage	Diversification, expansion and improvement of cultural offers	New economic activities (diversification of tourist services)
Requalification, revitalization of neglected spaces - re-arrangement of public spaces	Development and promotion of short-term events - increasing the "eventfulness" of space	New sources of income (tourism)
Production of new infrastructures (information boards, mobility schemes)	Greater opportunities for cultural exchanges and complementing cultural practices (openness to the EU, global)	Attracting new companies based on (soft) influence or location effect
<b>HARMFUL aspects</b>		
Degradation of space, standardization (physical), destruction of spatial identity	Standardization (content), loss of spatial authenticity, alienation in space	Mono-sectoral economy, higher expenditures, gentrification
Degradation of cultural heritage	Conflicts between the local population and visitors	The risk of the emergence of mono-sectoral economy - dependence on tourism
The impact of mass tourism on the environment	Loss of sense of local community	Exponential rise in real estate prices (gentrification processes)
Touristification - creation of mono-functional spaces	Changing the purpose of public urban spaces	General increase in prices due to tourism
Crowding, problem of parking spaces, limited mobility	Constructing Alternative Histories (Urry, 1999)	Rising rent costs lead to content impoverishment
"Conservation" of urban spaces - reducing the importance of public spaces	"Theatricalisation" of local values, rituals, customs	

## 7.5 Conclusion - transition from short-term to sustainable tourism strategies?

Analysed data from researches by Klepej et al. (2021), Marot et al. (2021) and Hočevár et al. (2018) point to the extraordinary importance of material cultural heritage for the development of urban tourism in Ljubljana and Slovenia. On the other hand, foreign tourists in contrast to domestic tourists significantly less favourably evaluate intangible values and cultural offer that appears in urban areas. In particular, the observations of tourists stand out that indicate a homogeneous structure of the urban tourism offer, which is based on the exploitation of the ambient, aesthetic and spatio-physical potential of the city centre without added, surplus values in terms of touristic diversification of services and contents. Data analysis shows that charm or cuteness in relation to the material characteristics of the space (i.e. heritage protected as monuments, low heterogeneity of spaces, low population density, green system, nature) in this context stands out as an extremely strongly key feature of the urban tourism offer. The analysis of poorly developed differential advantages of urban tourism in Ljubljana compared to other cities actually points to the blind spot of Slovenian urban tourism, which is unwilling or unable to identify the limited reach of current tourism development strategies. The data show that the current mechanisms of tourism development focus mainly on the preservation of material values, i.e. what we see in front of us, while we are significantly worse at assessing immaterial, more complex forms of value that bring potential added surplus value to tourism.

In doing so, one must ask whether Ljubljana and Slovenia as tourist destinations can in any way surpass the category of cuteness and charm. A bit more provocative and in other words - can Slovenia and Ljubljana as tourist destinations go further than just cuteness and charm? Although the majority of tourists in Ljubljana are satisfied with the tourist offer, this satisfaction must be placed in the context of the expectations of tourists, who to the greatest extent expect a well-preserved/renovated city centre with an appropriately designed architectural heritage, and that is what they get. The excess of this offer in terms of greater heterogeneity of the offer (especially intangible heritage and culture) is not noticed or it is characterized as average at best by one fifth of tourists. The tourism offer of Ljubljana is therefore relatively limited in the current context and does not show development potential for planning long-term tourism strategies, but mainly relies on the spontaneous exploitation of current potentials originating from the material cultural-historical heritage that has accumulated in past periods. Tourists notice the vagueness and lack in development of more complex, intangible values of urban tourism and express this also through the use of a specific vocabulary that focuses on very specific (homogeneous) characteristics and values of urban tourism in Ljubljana and Slovenia. The analysis of tourists' descriptions of Ljubljana based on text analysis shows that, apart from 'beautiful city centre' and 'greenery', there are no noticeable surpluses in Ljubljana's urban tourism offer. In this light, it is particularly sympto-

matic that certain segments of tourists (e.g. selected groups of tourists from Austria, Germany, Italy) have been very dissatisfied with the offer of nightlife for several years in a row. These groups of tourists in general assessed entertainment possibilities in Ljubljana as very poor (SURS, 2020).

Furthermore, the more complex development of urban tourist destinations in Slovenia is questionable in terms of content production, as no mechanisms have been developed to assess the impacts of short-term and mainly economically oriented urban tourism development guidelines. It is not clear how the offer of services is supposed to serve tourists, residents of Ljubljana, residents of the city centre or other users of the city on the long-term scale. The spontaneous, inertial development of urban tourism in Ljubljana and Slovenia was reflected in individual beneficial and also harmful effects, which were well described by Dupagne and Dumont (2006) and supplemented by data from research by Klepej et al. (2021), Marot et al. (2021) and Hočevar et al. (2018). The problem of this complex picture of the development of urban tourism in Slovenia, in which different influences mix, is the current inability of civil society, politics, economy to form consistent criteria, tools, evaluation mechanisms, through which it would be possible to judge between elements that are redundant or necessary for the future development of tourism.

The wide range of possible socio-spatial effects of urban tourism cited by researches (Dupagne and Dumont, 2006; Klepej et al., 2021; Marot et al., 2021; Hočevar et al., 2018) point out that before processes, during processes and after the processes of urban tourism development, it is of utmost importance to thoroughly analyse not only the physical changes in the space, but also the social context with all the social functions, services, networks that are present in the area and indirectly affect the functioning of the city. Examples of the instrumentalization of material cultural values for the needs of urban tourism can be found in many cities, in which competitive (global) urban policies try to create otherwise economically successful and aesthetically attractive spaces, but which are culturally sanitized and cleaned of all potentially interesting but short-term unprofitable impurities. Such a model of cultural and economic development of global cities is based on efficient models of production and consumption, intended to promote standardized tourist products that can be quickly commodified and offered to the tourist consumer market (Bianchini and Parkinson, 1993). This raises the question of how resistant are local spaces to such strategies that weaken heterogeneity and implement sudden changes in the operation of the local tourist market. This is clearly visible with the phenomenon of covid-19 pandemic and the problems associated with the sudden decline in numbers of foreign tourists and consumption of the tourist offer, which is mainly tied to one type of clientele. In the context of Slovenia, the criteria for determining the importance of intangible cultural qualities in city centres and wider city areas are very fluid, unclear and cannot be simply defined. Therefore, it might be worth paying more

attention to methods that try to measure the "material and immaterial" cultural values of areas that are under the pressure of touristification (Olsson, 1999; Bianchini, Parkinsson, 1993). The most attractive, interesting scenes and services in the city are usually found in the premises or in places with the highest contrast between seemingly incompatible ingredients that create differential advantages or unique elements that are more difficult to notice in other places. Such a concentration of extremes and diversities is undoubtedly very complex and potentially limiting from the point of rapid extraction of economic benefits (monetization), but may in the long run bring more resilient and more sustainable forms of urban tourism.

The data from the analysis clearly show that if Ljubljana and Slovenia want to take a step forward in the development of urban tourism, they urgently need to integrate additional forms of intangible cultural capital into tourism development strategies. In the context of global and European urban tourism, Slovenia is currently developing and marketing generic tourist offers that are based on material cultural values (in the form of a classic offer of the ambient, physical heritage and nature), while those spaces that offer different, deviating, perhaps less commercial content are increasingly being degraded i.e. pushed out of tourism planning strategies. This in the long run reduces the resilience of Slovenian urban tourism. One must be aware that Slovenian tourism has gone through a period of transition, during which various short-term development strategies and orientations, which were necessary for the consolidation of this sector, were tested. Maybe now is the time for a new wave of revitalization of different forms of non-material socio-cultural offer in Slovenian urban tourism, which is not only based on processes of economization (commodification), but also on the development of content for all users of the city and especially - in relation to foreign tourists - relatively neglected city dwellers who, in light of the covid-19 pandemic, represent key supporting elements on which the future tourist offer should be built.

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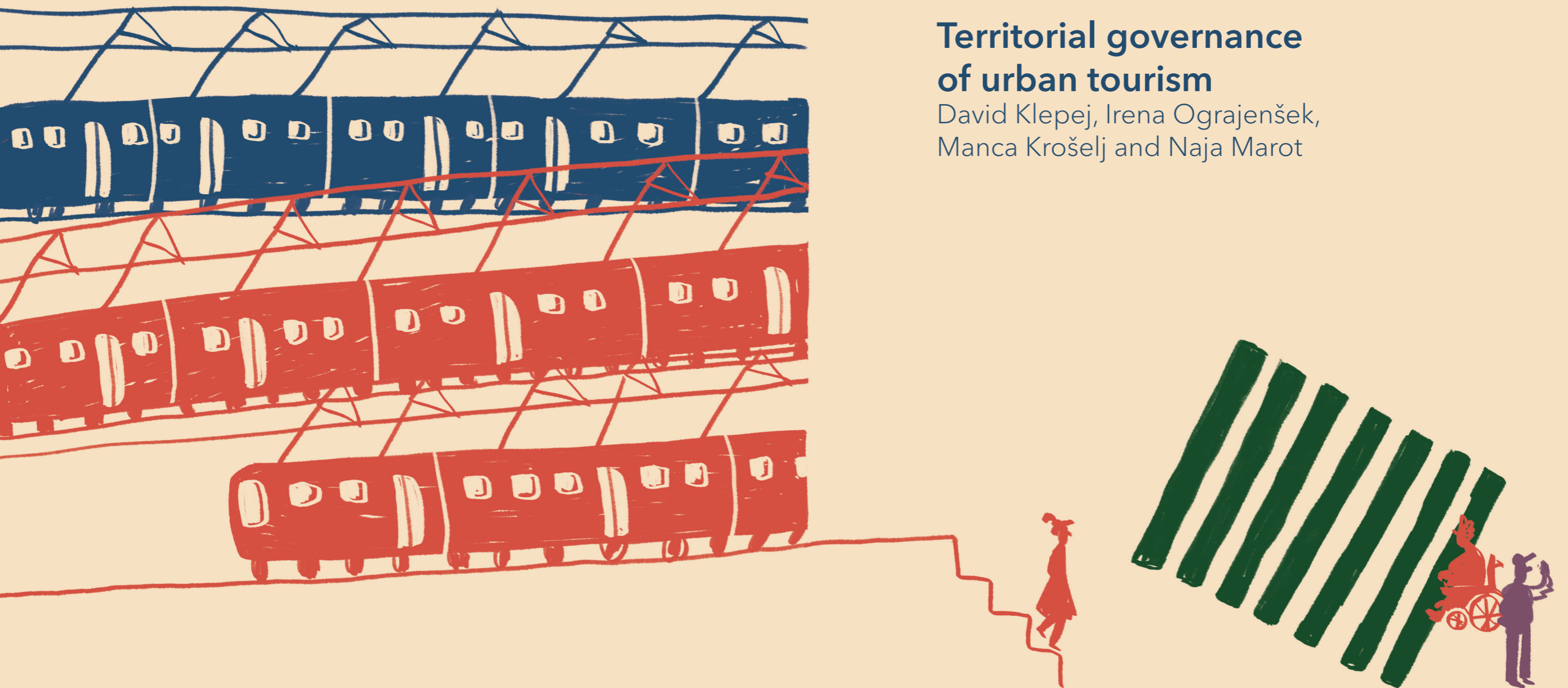
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## Chapter 8

### Territorial governance of urban tourism

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## 8.1 Introduction

People have been travelling ever since prehistoric times. While the reasons and motives for travelling may differ, most of them are rational: either they reflect a specific need (related to health, education, cultural or spiritual enlightening, and similar), or they may be economically relevant (promotion, sale or acquisition of specific products and/or services; promotion of an event, and similar). In both cases, such travelling represents a means to an end. While it may include some elements of tourism, it lacks the irrationality reflected in the fact that travelling is not just a means to an end, but *per se* the goal; that money spent on travelling may qualify as a 'sunk cost' (Čomić, 1990). This irrationality is also strongly related to hedonic travel motives, putting pleasure first and completely disregarding environmental and other bad consequences of 'globetrotting for pleasure'. In this regard, people seem to forget they are supposed to act as *homo oeconomicus* far too quickly.

Urban tourism has been under constant and persistent observation and specifically with regard to its damaging effects on local environments and local populations (see also Table 8.1). These negative effects include but are not limited to: increased pollution and use of scarce resources (Gössling, 2002; Russo et al, 2020; Rutt, Hall et al, 2015); increased mobility (Albaladejo & Bel, 2010); touristification as a change in service offerings (Freytag and Bauder, 2018; Nofre et al, 2018); changes in physical urban environments and their characteristics along with gentrification in the form of changed land use (Amore, 2019; Frenzel, 2019; Gössling, 2002; Kelly, 2008; Larsen, 2019; Maitland and Newman, 2008; Spirou, 2011); as well as reduced housing availability and increased housing prices (Garza and Ovale, 2019).

The effects of urban tourism on local environments and population can, without doubt, also be positive. However, especially with uncontrolled growth, they can also result in overtourism; a direct consequence of which is a reduction in the quality of life of local citizens. This, in turn, can increase negative sentiments towards tourism in the local community (Colomb and Novy, 2016; Füller and Michel, 2014; Mihalič, 2020; Milano, 2017; Novy, 2018; Smith et al., 2018; Stors et al., 2019). Both spatial and urban landscape dimension are common underlying threads of these effects. Consequently, they should not only be systematically addressed in the framework of tourism planning, but also in the framework of spatial planning. Strategic spatial plans should address tourism development (Ashworth and Page, 2011; Rahmafritria et al., 2020) and territorial governance should concern itself with measures that seek to reduce negative tourism effects.

One of the key motivators for cities to foster tourism development is increased financial inflows. Tourist spending is defined as both the origin and framework of those tourism functions which we label 'economic'. Not just the multiplicative effect of every Euro that tourists spend in a location either directly on accommodation and subsistence, but also in support industries (such as transportation, retail, communication) should be mentioned in this context, as well as the accelerative, exchange, developmental, balancing, employment, and other functions of tourism. All of them either directly or indirectly influence the income of individuals, (tourist) companies, cities, communities, regions and countries.

	Advantages	Disadvantages
<b>Economy</b>	Income generation (possibly also income increase) for local businesses and population Jobs creation (in general and specifically in tourism) Increase in standard of living for local population Improved infrastructure at the destination	Price increase and inflation Less opportunities for local and traditional jobs Local population cannot live in tourist areas Higher local population taxation to cover investments in new infrastructure Most of generated income from the local area is transferred to large tourism companies
<b>Environment</b>	Building renovation Space restoration A larger number of better spatial projects Improved local landscape Increased awareness of necessity to protect environment Environmental education Waste management	Destruction of natural resources and landscapes Increased pollution Traffic jams Increased waste
<b>Society and culture</b>	Better quality of life Increased pride of local population Increased equality of different population groups (according to gender, age ... ) A larger number of better public services Development of communal buildings Development of local population's language, cultural, communication, and societal skills Increased respect towards other cultures	Increased infrastructure taxation Increased crime rates Youth emigration from traditional local communities Trivialisation of local customs and religion Increased conflicts among tourists and local population
<b>Political life</b>	Increased cooperation among local population Increased power of the local community Assurance of rights in (natural) resources management	

**Table 8.1**  
Advantages and disadvantages of tourism development per thematic areas (Source: Kunasekaran and Kumar, 2021)

Several illustrative examples of less-than-optimally managed relationship between tourism growth and spatial planning are given by Ograjenšek (1994):

- increased cost of infrastructure (re)construction along with the provision of public services (a tourist destination needs more policemen, firemen, medical doctors, etc. in order to cater for both visitors and local population);
- decreased economic benefits of the destination, should the tourist infrastructure be foreign-owned and every Euro earned flows abroad;
- increased budget spending to help tourism workers survive outside the tourist season;
- increased cost of upkeep for cultural and historic monuments; museums, galleries, libraries, etc.;
- increased budget spending for education, health insurance, housing subsidies and other needs of local population growing to accommodate destination's tourism development needs;
- changed land use to accommodate additional tourism-related infrastructural needs (starting with additional accommodation).

Tourism studies in the decades that immediately followed WWII were mostly focused on documenting the positive developmental effects of tourism. Thereafter, and towards the end of the 20<sup>th</sup> century, Kasper and Kasper (1986) started emphasizing the cost of tourism development. Before the Covid-19 pandemic, citizens in tourism hubs while appreciating rich cultural offerings, the development of critical infrastructure, jobs creation, and GDP growth, also became painfully aware of higher housing prices, overcrowded city centres, pollution, and other negative effects (Andriotis and Vaughan, 2013; Novy and Colomb, 2016). This prompted decision-makers to try and plan further tourism development in line with the wishes and needs of local populations in an integral instead of a partial manner. Their goal was to prevent potential conflicts between tourist and local populations, and between those in charge of spatial planning and those in charge of tourism development at the urban destination (Philips and Roberts, 2013; Walia, 2021).

This chapter addresses the territorial governance challenges that arise from urban tourism with an especial emphasis on the model of integral urban tourism governance and its use in the quality assessment of urban tourism governance in practice. We developed this model within the framework of the MESTUR project.

The absence of territorial governance solutions from tourism and spatial planning strategies both abroad and in Slovenia is visible at all decision-making levels. The Slovenian tourism development strategy for the period 2012-2016 does mention sustainability. Its primary focus, however, is on the growth paradigm with its main goal being the strengthening the tourism sector: income from accommodation and other services, increased numbers of tourists, and an increased number of overnight stays. Tourism is supposed to have a positive effect on

balanced regional development and local population's quality of life. While there are already several measures in place for natural spaces and habitats, cities lag behind. The national tourism development strategy does not even mention urban tourism; it is 'hidden' under the label of cultural tourism via reference to attractions such as cultural heritage and festivals. Compared to this 'old' approach, the newer Strategy for sustainable tourism growth (2017-2021) emphasizes Ljubljana and its surroundings as one of the major Slovenian destinations and recommends better utilization of cultural heritage for tourism purposes.

In a very similar way, cities and their development are only given a passing node in the strategic documents of the tourism sector. Tourism itself is very poorly represented in the spatial planning documents. Neither municipal spatial plans nor the national level strategy (Strategy of Slovenian Spatial Development, MOP, 2004) cover tourism as an individual sector of the economy. They also do not provide any related goals and/or guidelines apart from the indirect ones which aim to protect cultural heritage and historical city centres. Tourism was only a minor issue in the drafting of the new strategy of spatial development (from December 2018). This is the reason we need a new approach to territorial governance – and is an approach that is in line with Boivin and Tamguay (2019) who claim that cities should include tourism in their spatial planning deliberations. How they could do so is described in this chapter.

To this end, we first provide the theoretical foundations of territorial governance. This is followed by a presentation of territorial governance principles in Central European cities with an emphasis on the governance framework in Ljubljana. Discussion of our integral urban tourism governance model also includes the model's application to the cases of Ljubljana and Maribor, along with selected good practice examples in support of its practical implementation.

## 8.2 Theory of tourism governance and spatial planning

### 8.2.1 The spatial governance of tourism in cities

Given its complex interactions with society, economy, space and the environment, tourism demands broader development guidelines and a systematic approach. Any one-sided efforts (for example a focus on only on growth) could end in the creation of catastrophic negative side effects. Urban governance and development are, per definition, closely intertwined with spatial planning which either determines or reflects the relationships that exist betwixt and between activities and the rules that govern their implementation within cities. Tourism governance, on the other hand, is very results-focused, and seeks to activate all relevant spatial and other resources to facilitate growth. It is imperative that it should concurrently take into account the broader (including negative) effects that such unchallenged growth might cause.



The classic planning approach is based on key development documents. Decision-makers at the destination prepare them every few years with the help of relevant stakeholder groups. Middle-range planning is focused on planning periods from 5 to 10 years; and long-range planning on planning periods of more than 10 years. The key starting point of every plan is an analysis of the current state of affairs in tourism (both in terms of supply and demand) and its broader (economic, political, social, etc.) environment. In the subsequent process, discussions of the vision, developmental concept and strategy help to specify key development goals along with possible ways and means to facilitate their achievement. Each goal is then tied to relevant measures and deadlines; these, together with the identification of process owners are the basis of development programme which explain in detail how a development policy could and should be implemented. Monitoring is based on an *ex ante* definition of key indicators for each goal. In parallel, promotion of the goals to and within relevant stakeholder groups can take place, along with the design of the (given) tourism product.

The planning process can be integral and take into account common goals as well as the direct and indirect effects of different activities. If partial, it is deemed irrational because it deals separately with elements of tourism offering and infrastructure such as accommodation, catering, transport, retails, tourist attractions, safety, education, and so on. Such separate treatment greatly reduces the legitimacy of the strategy as a whole.

Another key difference in possible approaches to policy formation and implementation is stakeholder inclusion. If a *top-down* approach is used, goals are formed at the national level or within institutions. They are then communicated to stakeholders who have no real means of modifying them. If the *bottom-up* approach is used, the opinions, wishes and needs of the local population are used as a starting point for any policy deliberations.

**Table 8.2**

Examples of (spatial) development concepts in cities (Source: Hatuka et al., 2018)

Concept	Definition	Spatial measures
<b>Global city</b>	City as metropolis with global economic influence	Integrated large city center, banking, shopping, entertainment, international airport or harbour, integrated railway system, traffic jams
<b>Sustainable city</b>	City as ecosystem of society, economy and environment	Dense and heterogeneous use of space, space greening, passive solar energy
<b>Resilient city</b>	City resilient to dangers and threats	Physical elements (roads, buildings, infrastructure) resilient to dangers and changes
<b>Creative city</b>	City as hub of innovation and growth	Development in city centres, postindustrial areas, networks of specialized companies, aesthetic urban development
<b>Smart city</b>	City as a complex network of information flows	Efficient infrastructure, IT services, wireless and other advanced technologies

The influence of various stakeholder groups differ within the different steps of the planning process. Such interactions may also be affected by the type of investment involved (public, private, or public-private partnership).

Planning and governance are also dependent on those guidelines that are provided at any specific time in the process along with (global and local) trends. At the moment, the key concepts are those of global, resilient, creative and smart cities (see Table 8.2) and the related processes of revitalisation, gentrification, active and sustainable mobility, green technologies, climate change, sharing economy, digitalisation, and so on. All of them can be applied to both tourism and cities.

One of the classic top-down planning approaches in tourism follows from spatial planning and urbanism. Here, different governance levels interact (local, regional, nationwide or state, international). By default, cities and states have a specific spatial planning cohabitation which is reflected in both integrative environmental planning and policy analysis (Weingarten, 2010; Fischer et al., 2013), whereas spatial planning emphasises the necessity of communicative (Innes and Booher, 2004), participative (Healey, 2006) and co-evolutionary (Boelens and de Roo, 2016; Mees et al., 2016) planning approaches. All emphasize the necessity to connect stakeholders so as to enable constant stakeholder dialogue – in our case a dialogue among stakeholders from tourism and spatial planning sectors.

The ESPON COMPASS project report (ESPON, 2018) indicates that tourism sector currently has a neutral effect on spatial planning. At the same time, most EU member states claim that, at the local level, tourism and spatial planning already go hand in hand. For both Austria and Slovenia the level of integration is low, with the spatial component in tourism almost completely non-existent. Yet some authors (Stanley, 2014; Stead and Meijers, 2009; Waterhout, 2012) deem integration important; from their deliberations, Marot and Kolarič (2019) formed the following three meanings of integral spatial planning:

- 1) the integration and use of different approaches such as strategic spatial planning, stakeholder participation, co-creation, evaluation;
- 2) the combination of topics such as sustainability, resilience, climate change, renewable energy resources, landscape;
- 3) the vertical (among governance levels) and horizontal (among different sectors, e.g. tourism, spatial planning, environment protection, retailing) collaboration of stakeholders in 'grey areas' which significantly exceeds the current collaborative scope.

### 8.2.2 Disturbances in urban tourism planning and governance processes

Tourism in general, and urban tourism in particular, are critically dependent on weather, as well as political, security, economic, and health conditions, and often irrational inexplicable factors (such as the possi-

## 8 Territorial governance of urban tourism

bility of any destination becoming ‘fashionable’ for a specific period of time) as well as administrative limitations (for example very strict customs formalities, currency exchange regulations, etc.). This makes tourism planning and governance more of a challenge (Ograjenšek, 1994).

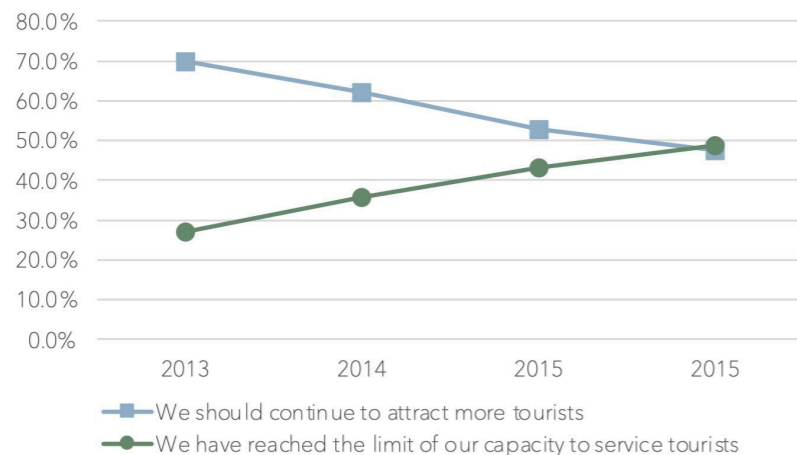
The most frequent disturbances to urban tourism planning and governance processes are:

- The duality that exists in markets for most tourism activities: for example, both local residents and tourists use hotels (for business and leisure meetings, banquets, shopping, visits to hair stylists, and so on).
- A misunderstanding pertaining to the tourism product, which originates in suppliers’ perceptions. For instance, suppliers believe they are selling accommodation. Yet their ability to sell accommodation also depends on nearby attraction(s), promotion and accessibility of both the attraction(s) and the accommodation.
- Legal limitations imposed on tourism development by public institutions from other sectors (given the power of those institutions at local, regional and national levels these can be quite significant, and often contradictory).
- The non-existent cooperation of micro and small tourism companies at the destination.
- Ideological “wars” among ‘modernizers’ and ‘traditionalists’ at the destination.

The study carried out in Barcelona between 2013 and 2015 shows how quickly local residents’ sentiment towards tourism can change (Figure 8.1). Within three years, the share of those who believed that tourism had reached the carrying capacity increased from 27 % to 49 % and became larger than the share of further tourism growth supporters (Alvarez-Sousa, 2018). Ada Colau, who was elected Mayor of Barcelona in 2015, made this one of the critical campaign issues. Similar results for other cities (for example Amsterdam and Lisbon) are shown in the UNWTO (2018) study (Figure 8.2). In Ljubljana, Ninamedia (2019) reported similar negative sentiments amongst the residents of Ljubljana for the last pre-pandemic year.

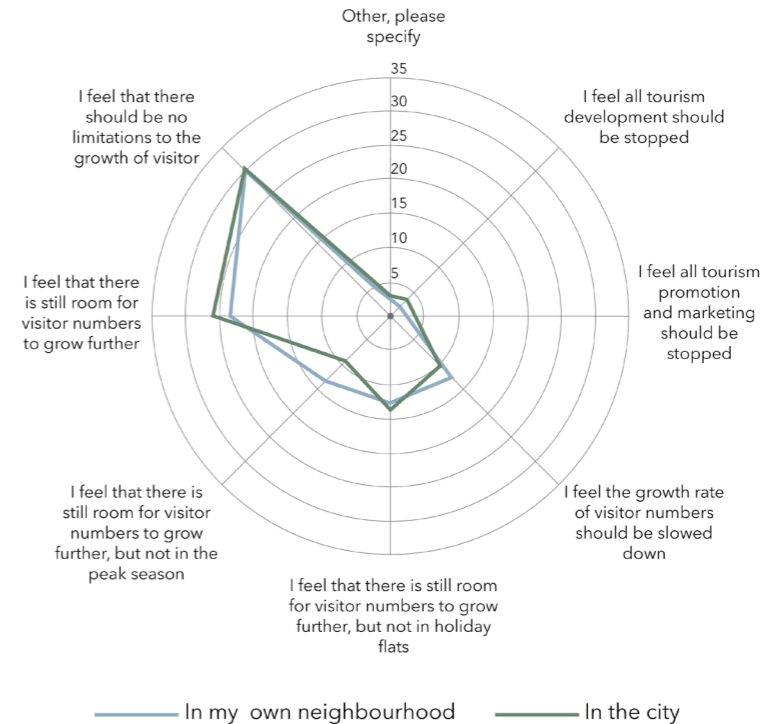
**Figure 8.1**

Attitudes of Barcelona residents towards development of urban tourism (Adapted after Alvarez-Sousa, 2018)



**Figure 8.2**

Residents’ views on tourism development in the cities of Amsterdam, Barcelona, Berlin, København, München, Salzburg in Tallin (Adapted after UNWTO, 2018)



### 8.2.3 Sustainable planning and governance of urban tourism as post-pandemic challenge

The definition of sustainable tourism is a major challenge. UNWTO (2014) states that it is tourism “that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities”.

When defining sustainable tourism, we can also provide a list of what such tourism should not be – the exact opposite of so-called overtourism. However, understanding of overtourism is also related to understanding its subjective, local, and contextual nature (Koens, Postma and Papp, 2018). Nevertheless, as indicated in Figure 8.3, some agreement on its key aspects does exist.

From a spatial distribution perspective, overtourism appears, in general, at selected urban hotspots. In other words: its effects on a city are selective (Pearce, 2001; Koens, Postma and Papp, 2018). The interpretation of what is ‘too large a number of tourists’ is by default subjective (both of managers and residents) which is why Koens, Postma and Papp (2018) indicate how difficult it is to operationalize the concept of overtourism and develop a general set of indicators for it.

Table 8.3

Effects of overtourism and their spatial distribution (Source: Koens, Postma and Papp, 2018, p. 5)

Issue	Type of impact	Spatial distribution
Overcrowding in city's public spaces	Overcrowding on streets and pavements, as well as public transport, heavy traffic, loss of local identity	Tourist hotspots and newly developing tourist areas
Pervasiveness of visitor impact due to inappropriate behaviour	Noise, disturbance, loss of local identity	Tourist hotspots and newly developing tourist areas
Physical touristification of city centres and other often-visited areas	Loss of amenities for residents due to mono-culture of tourist shops and facilities	Tourist hotspots and city centres
Residents pushed out of residential areas due to AirBnB and similar platforms	Less availability of housing, loss of sense of community and security	Throughout the city, mainly near tourist hotspots
Pressure on local environment	Increased waste, water use, air pollution	Throughout the city, near specific sites (harbour, road junctions)

### 8.3 (Territorial) governance of tourism in selected Central European cities

Before the Covid-19 pandemic, Central European cities experienced growth in urban tourism. Consequently, we decided to analyse their approaches to spatial/territorial planning with regards to urban tourism governance. We analysed one strategic spatial planning document for each selected city (City of Zagreb, 2018; Degani et al., 2011; Heinig et al., 2018; Inninger et al., 2013; Kilian et al., 2010; Kochalski et al., 2013; Kos et al., 2015; Mangili, 2015; MOL, 2018; Zurich City Council Office for Urban Development, 2016). We retrieved these documents from official city websites. Some of them were available in English (for Leipzig, Poznan, Turin, Zagreb and Zurich), others in Italian (Padua), German (Graz), Slovak (Bratislava) and Slovenian (Ljubljana and Maribor). If available, we analyzed the strategic spatial plan, if not, we analyzed the strategy of urban development (which were usually less comprehensive and had a lower level of spatial detail, e.g. zoning). Given that there are no European guidelines for spatial planning exist, the approaches used by cities differ not just among countries but also within them as shown by our 'pairwise' comparison of two Italian cities (Padua and Turin) and two Slovenian cities (Ljubljana and Maribor).

All of the analyzed cities include tourism in their strategic documents, yet the level of inclusion differed enormously. Four out of the ten analyzed cities mentioned tourism development as one of their strategic priorities, three partially dealt with it, three barely mentioned it. None of the documents dedicated an individual chapter to tourism. Only three cities (Bratislava, Maribor and Poznan) dedicated an individual subchapter. Most of them viewed tourism as part of the strategic direction of other sectors: five saw it as part of the economic sector (Bratislava, Ljubljana, Turin, Zagreb and Zurich), three as part of culture

and/or sports (Maribor, Padua and Poznan), and two as key to internationalization (Graz and Leipzig).

The key goals for tourism development are quicker development and better recognisability of the destination (Leipzig, Ljubljana, Zagreb and Zurich), better use and valorization of tourism and cultural potentials (Bratislava and Turin) as well as multiplicative effects (tourism as an integrative force in urban development processes) (Maribor and Padua, see Figure 8.3).

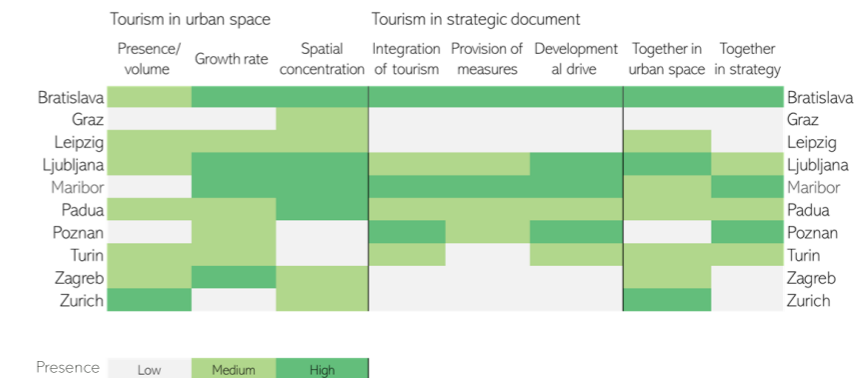


Figure 8.3 Analysis of tourism presence in urban space and spatial strategic documents of selected Central European cities: presentation of results

The different developmental directions of the analysed cities are also reflected in the different measures they have implemented to improve tourism infrastructure and attractions - and in general make the cities more attractive to tourists. Interestingly, new accommodation is only planned in Bratislava (focused on areas with excellent public transportation and in the immediate vicinity of tourist attractions) and partly in Graz (although Graz does emphasize the need to create both one tourism destination out of a broader region and the necessity of tourism valorisation for existing cultural, recreational and other tourism offerings in the area). Four cities are planning development and valorization of natural resources: thermal water (Padua), river (Ljubljana and Maribor), forest (Ljubljana and Zagreb), and farming (Padua and Zagreb). Sports infrastructure in Ljubljana, Maribor, and Poznan is recognized as an important factor of tourism development - these cities plan either reconstruction, upgrades, or the development of new sports facilities for visitors and residents. Poznan is also planning to develop new attractions (University park of Earth history and a military museum). Bratislava, Poznan, and Turin are planning to develop or improve existing services, events, and promotional activities. Graz, Padua, and Turin want to better utilize their urban characteristics (architecture, culture, diversity, gastronomy and other city centre offerings) while at the same time emphasizing local spatial characteristics and endowments. Maribor would like to develop its airport, while Bratislava aims to better integrate its airport into the existing public transportation network. The Leipzig and Zurich documents are the only ones that do not specify any particular tourism infrastructure or attraction that needs development.



Our findings confirm our working hypothesis that strategic spatial planning does not appear sufficiently equipped to formulate measures targeted at tourism growth and its effects on urban spaces. However, this confirmation is only based on the preliminary analysis of (limited) written resources, without field research. Further research challenges also included determining stakeholder inclusion in the strategic documentation preparation process, and how strategic guidelines are actually practically implemented in given urban situations.

#### 8.4 Starting points for development of integral urban tourism governance: case of Ljubljana

There are many different types of stakeholders participating in tourism sectors. They can be divided into private and public organisations as well as individuals. From the viewpoint of the roles they play, we differentiate between suppliers, promoters, and managers/operators/governors.

In Ljubljana, the core public organisations dealing with tourism governance are Ljubljana Tourism (sector promotion and tourism product development), and the City Municipality of Ljubljana (Bureau of development projects and investments, Department of culture, Department of spatial planning). Key suppliers are cultural-tourism institutions with their programmes (for example Museum and Galleries of the City of Ljubljana, Festival Ljubljana, Kino Šiška Centre for Urban Culture, National Gallery, Museum of Modern Art, etc.) as well as the accommodation and gastronomy sectors (Tourism and Hospitality Chamber of Slovenia). Further participating in tourism governance in Ljubljana are 17 local communities of the City Municipality of Ljubljana, which collaborate with non-profit organisations in a range of areas including of sports, culture and social services when it comes to the design and upkeep of urban public spaces.

Formally, urban tourism governance in Ljubljana started in 2001, when Ljubljana Tourism was established to develop and promote the tourism offerings of not just for the city of Ljubljana but also the broader (Central Slovenian) region. Since its establishment, Ljubljana Tourism has prepared five strategic documents on tourism development for the City Municipality of Ljubljana:

- Strateške usmeritve razvoja turizma v Ljubljani in akcijski načrt nalog za obdobje 2001–2004 (eng. Strategic Guidelines for the Development of tourism in Ljubljana and action plan for the period 2001–2004; Ljubljana Tourism, 2019);
- Strategija Zavoda za turizem Ljubljana za obdobje 2005–2008 (eng. Tourist Destination Ljubljana for the period 2005–2008; Ljubljana Tourism, 2019);
- Strateški razvojni in marketinški načrt turistične destinacije Ljubljana za obdobje 2007–2013 (eng. Strategic Development and Marketing Plan of the Tourist Destination Ljubljana for period 2007–2013; Lju-

- bljana Tourism, 2006);
- Strategija za razvoj turistične destinacije Ljubljana 2014–2020 (eng. Strategic Development Tourist Destination Ljubljana 2014–2020; Ljubljana Tourism, 2014);
- Strategija razvoja turistične destinacije Ljubljana in ljubljanske regije 2021–2027 (eng. Strategic Development of the Tourist Destination Ljubljana and Ljubljana Region 2021–2027; Ljubljana Tourism, 2021).

It is noteworthy that the foundations for the project of urban tourism governance have already been established in the second strategic document (“Tourist Destination Ljubljana” for the period 2005–2008). The organisational structure of the public institution reflects this fact, along with the network of 27 stakeholders (key pillars of tourism supply in Ljubljana – representatives of hotels, gastronomy, cultural institutions, etc.) established in line with the strategic guidelines. With the formal confirmation of the “Strategic Development and Marketing Plan of the Tourist Destination Ljubljana” for the period 2007–2013, the long-term vision and development perspectives have been articulated, which were also adopted by subsequent documents emphasizing principles of inclusive governance.

Strategic developmental policy measures for the period 2014–2020 addressed five areas: stakeholder partnership, competitiveness, intensive promotion, innovation, as well as quality, knowledge and sustainable development (Ljubljana Tourism, 2014). Personified identities with the goal of Ljubljana’s international diversification from similar destinations were developed to foster marketing and promotion. Basically, the strategy adopted identity promotion and tourism offerings development in two key tourism segments: congress and leisure. The first one was defined as key one already in 2011 (in the policy document Congress Ljubljana 2020). The latter one uses the concept of ‘active romance’ to address cultural-tourism values of Ljubljana such as experiencing the atmosphere, space, gastronomy, music, etc., as defined and described in more detail in Strateške smernice kulturnega turizma v Ljubljani za obdobje 2017–2020 (eng. Strategic Guidelines for Cultural Tourism development in Ljubljana for period 2017–2020; Ljubljana Tourism, 2016).

These strategic guidelines (Ljubljana Tourism, 2016) are the first in line of more inclusive tourism development documents, as they represent a joint inter-sectoral effort of Ljubljana Tourism and City Municipality of Ljubljana’s Department of Culture. They prepared the document called Strategija razvoja kulture v MOL 2016–2019 (eng. Strategic Development of culture in the City Municipality Ljubljana 2016–2019) and foresaw a formal development programme to include cultural institutions of the city into the urban tourist offerings. While this is a good starting point, practical implementation as well as pandemic-generated crisis in the tourism sector disclosed several downsides and imperfections (Figure 8.4).

## 8 Territorial governance of urban tourism

Figure 8.4

Selected interview excerpts on the topic of urban tourism governance (Source: Krošelj et al., 2021)

*Ljubljana is very active when it comes to its presentation and brand development. Yet it leaves little space for the local cultural scene to grow and prosper in alignment with this tourist image. This results in both lack of audience and non-institutional production spaces. This became very evident during the pandemic.*  
(Local tourist guide)

*Everything is centralized at the local level – City Municipality of Ljubljana and Ljubljana Tourism are financed by the same institution, which leads to a very singular image of identity and capitalist idea of tourism as a profit-generating machine. In a long term, this cannot be sustainable for the local population.*  
(Local tourist guide)

*Strategic approach to cultural tourism governance and development of a more sustainable tourism is well managed. Both Slovenian Tourist Board and Ljubljana Tourism are very good at it. They are successfully connecting numerous tourist suppliers and companies. However, they could increase their efforts to support local initiatives of cultural and creative industries.*  
(Representative of the Centre for Creativity)

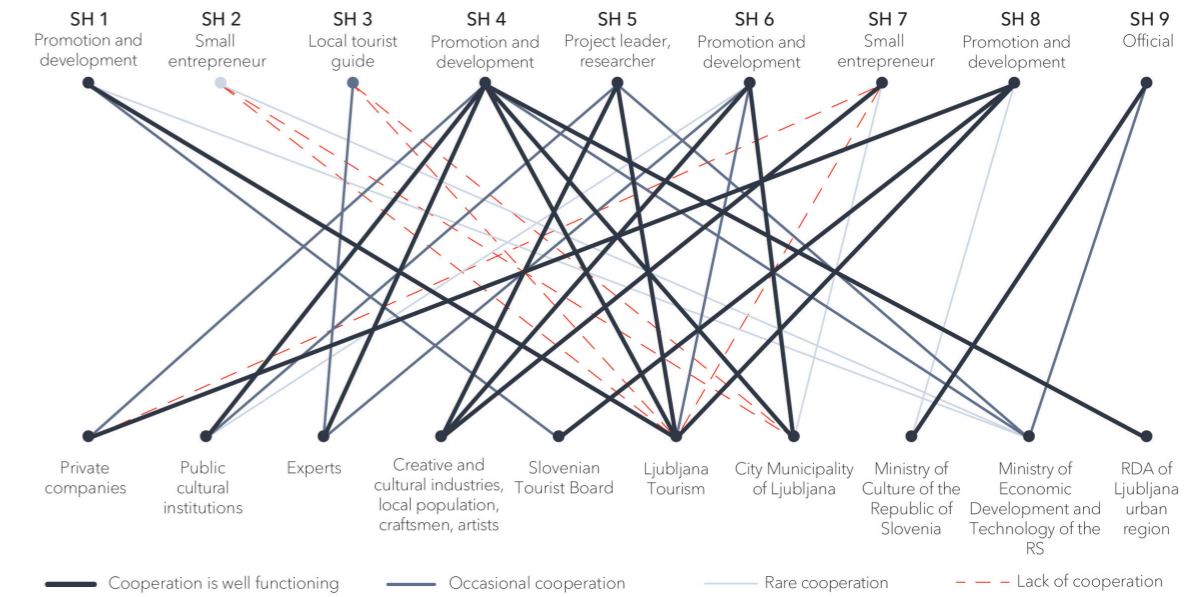
Following on from the SPOT project research (Krošelj et al., 2021), and based on interviews with cultural tourism stakeholders in Ljubljana on the topic of cultural tourism governance, interviewees seem to believe the road towards higher-quality inter-sectoral collaboration is still rather long and difficult (Figure 8.5).

Several critical findings of this research need to be specifically emphasized:

- Policies which are more directly supported by local communities are more successful. This is especially the case in the growing sector of micro and small companies as well as local cultural and creative industries which are often interdisciplinary.
- More investment opportunities are needed for inter-sector collaboration. There seems to be a certain lack of communication between sectors, as well as growing scepticism, and lack of readiness to collaborate – and yet, especially in the digital age, collaboration is essential.
- Too much focus is given to the promotion of exclusive boutique tourism which indirectly excludes all other tourism segments and the local community, and only focuses on the promotion of tourism offer that is solely available in the city centre.
- Better inclusion and expansion of existing partner networks in the area of cultural tourism offer in Ljubljana is needed as the private sector is often completely neglected (especially in the framework of larger projects).
- Ljubljana needs policies which will better activate, empower, and promote the development of cultural tourism offer.

## Urban Tourism in Slovenia: Characteristics and Governance

### Section B



## 8.5 Integral model of urban tourism's territorial governance

Figure 8.5

According to interviewees, stakeholders in the public sector collaborate more successfully while stakeholders from the private sector are very often not included in larger projects and are thus neglected (Source: Krošelj et al., 2021)

### 8.5.1 Initial explanations

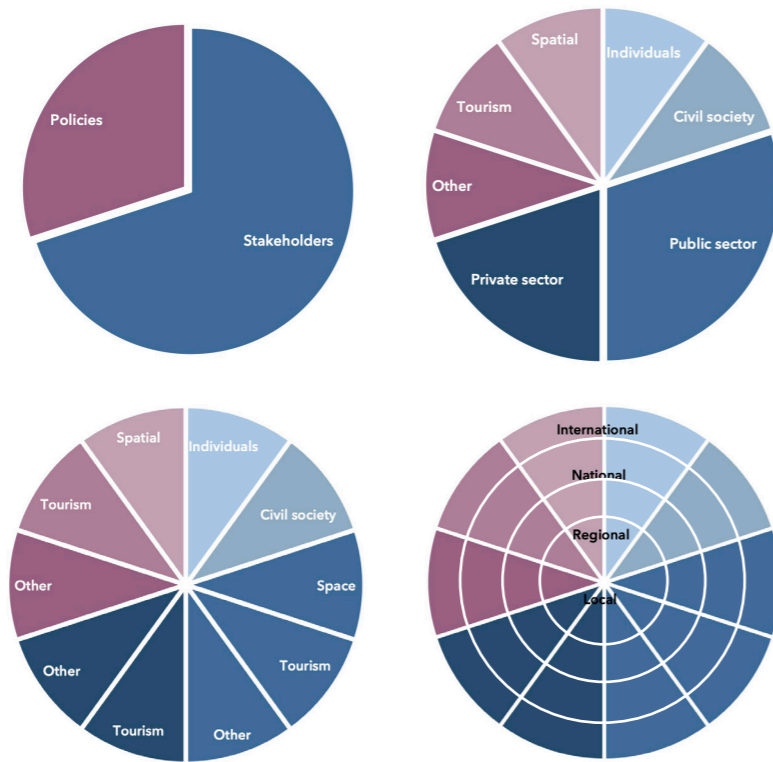
When developing the integral model of urban tourism's territorial governance we built on two pillars: stakeholders and policies. Policies were divided into tourism, spatial, and other (targeting economy, sustainable development, culture, etc.). Stakeholders were divided into individuals, civil society (networks), the public sector, and the private sector. Stakeholders from the private sector were further divided into those that are active in the area of tourism and others. Stakeholder from the public sector were further divided into those that are active in the area of tourism, those that are active in the area of spatial planning, and others. The model aimed to assess the strength of ties among and between the policy areas and thereby identify those segments, which need to be better integrated.

Policies and stakeholders in the model are dealt with at the governance level at which they actually have impact: local, regional, national, and international. The model also aims to assess the quality of stakeholder activities as well as the strength of their inclusion into tourism governance.

In order to facilitate the easier use of model, its key components are presented step-wise in Figure 8.6

**Figure 8.6**

Integral model of urban tourism's territorial governance: development in four steps: identification of policies and stakeholders (upper left-hand corner) and division into areas of activity (upper right-hand corner); areas of activity specified in more detail (lower left-hand corner) and governance levels (lower right-hand corner)



### 8.5.2 Integral model of urban tourism's territorial governance: practical application

Our integral model of urban tourism's territorial governance can be applied either in the process of self-evaluation or in the formal external evaluation of governance quality.

In the first step, all policies and stakeholders at the destination should be identified and placed into the relevant model segment.

Assessment of individual segments is next, followed by assessment of the quality of inter-segment collaborations in the processes of urban tourism's territorial governance within the (given ) destination. Both secondary resources (policy documents, written reports, clippings, etc.) and primary data (from interviews with stakeholders etc.) are instrumental in all steps.

The key model output is the identification of areas (model segments) which need improvement either in terms of policy formulation or stakeholder collaboration - or both. The model also supports numerical evaluation of the relationship that exists between any chosen segment and tourism (1 - working relationship; 2 - room for improvement; 3 - defunct relationship; and 4 - non-existent relationship).

Our theoretical model was practically verified for the Slovenian cities of Ljubljana and Maribor at two workshops (on 8 November 2021 in Maribor; and 26 November 2021 in Ljubljana). Our deliberations were based on our knowledge and practical experience of tourism governance in both destinations.

### 8.5.3 Case of Ljubljana

As the capital city of Slovenia, Ljubljana is a key urban destination and plays an important role in development of Slovenian tourism (Figure 8.7). Stakeholders and policies at local and national level are represented in all model areas (segments). The regional (which is currently not established in Slovenia) and international levels (as tourism does not have a supranational governance level like other European sectors) are neglected. The best working relationships among model areas and tourism were found to be at the local level. Tourism governance is good, spatial governance is poor and should be improved. Civil society's inclusion could also be better (in the area of tourism it is currently non-existent). The same goes for the inclusion of local residents.

### 8.5.4 The Case of Maribor

Maribor is the second largest city in Slovenia, but it is not among key tourist destinations in the country. This is reflected in our identification of a lower share of identified relationships (Figure 8.8). The only functioning level is the local one. Civil society and non-tourism private sector have no relationship with tourism. Consequently, all model areas (segments) need improvement, while civil society needs to be established and activated.

### 8.5.5 Comparison of Ljubljana and Maribor

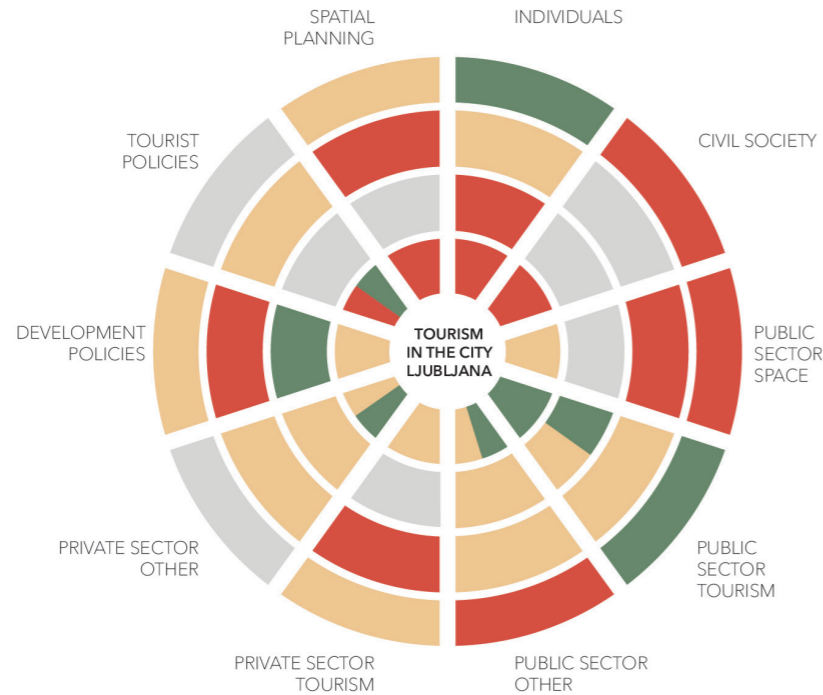
As shown in Figure 8.9, the only similarity between Ljubljana and Maribor is at the local level - in Ljubljana the local public sector in tourism functions best; in Maribor the local spatial planning.

Maribor has significantly less presence at the international level and its civil society and non-tourism private sector have no relationship with tourism. Both cities display a lot of potential for improvement in all areas, with Maribor also having a lot of catching-up to do if it is to reach a level that is comparable to that which Ljubljana already enjoys.

Finally, with integral models for Ljubljana and Maribor developed and some additional verifications carried out for smaller Slovenian cities (we chose Celje, Velenje and Žalec and addressed their tourism and spatial planning challenges in a workshop carried out on May 13<sup>th</sup>, 2022) we can conclude that the model can be used for any urban destination regardless of their individual current tourism development level.



**Figure 8.7**  
Integral model of urban tourism's territorial governance: practical application in the case of Ljubljana



**INDIVIDUALS**

Local tourism organisations and suppliers address **foreign tourists** with custom-tailored offerings, new products and marketing. Their numbers for the time-being do not have a negative impact on urban quality of life.

Low level of **domestic tourists'** interest in destination; they are not specifically strongly targeted anyway.

**Daily visitors** primarily come to participate in activities, which are not part of tourism. This causes and aggravates the problem of non-sustainable mobility.

**Local inhabitants**, especially those living in the city centre, already experience dissatisfaction with overtourism, but not yet to such extent that they would want to actively participate in tourism governance.

**CIVIL SOCIETY**

Ljubljana does not participate in development and activities of **international, national and regional non-profit organizations** as well as civil and cultural communities in the broader sense. Some individual initiatives do exist, but they are not necessarily related to tourism. Increased interest of non-profit organizations in housing policy as well as AirBnB challenge has been noted.

Ljubljana is a hub for numerous national non-profit organisations, but none of them deals with issues related to urban tourism and its development.

**Local non-profit organisations along with civil and cultural communities** to a certain extent do try to raise attention for effects of overtourism, but do not act in a proactive manner in the tourist destination development activities (only minor tourism offerings are created with the participation of cultural processes and urban quarters' societies).

**PUBLIC SECTOR-SPACE**

At the **international level of spatial planning** Ljubljana figures as a (primarily highway and railway) traffic hub; tourism is not represented.

Urban tourism is poorly represented at the **national level of spatial planning**.

Spatial planning **at the regional level** is non-existent.

Tourism is represented in **local spatial plans** but not in an integral manner; negative effects of tourism are particularly poorly reflected.

**PUBLIC SECTOR-TOURISM**

Ljubljana is an important **European destination**, also included in ECM.

As the nation's capital, Ljubljana is recognized as **one of the key destinations in the country**. Despite that fact, the Slovenian Tourism Board is not a strong partner in development and marketing activities.

Local tourism organization is leading the **regional promotional activities**. However, the tourism offerings could be more decentralized.

Local tourism organization is very successfully leading the **destination marketing activities**, with continuous development of new products which are internationally recognized and awarded as innovative.



**PUBLIC SECTOR-OTHER**

City does not have a department or office dedicated to acquisition of European and other **international funding**.

Tourism is poorly represented, which is specifically demonstrated in the area of education.

The regional level in Slovenia is non-existent. This deficit is, to a certain extent, addressed by the regional development agency, which is leading tourism-related activities at the regional level.

Tourism is relatively well represented in the framework of the **City Municipality of Ljubljana**, yet not well addressed in the framework of municipal development policies.



**PRIVATE SECTOR-TOURISM**

Interest of **international companies** to invest in the destination is slowly increasing; primarily among hotel chains and providers of transport services.

Larger Slovenian tourism companies (hoteliers) are poorly represented in the city. Providers of transport services are present but could do better in improving Ljubljana's connectivity nationwide.

At the regional level, there are no tourism companies.

**Local (service) businesses** are proactive and co-creative both in tourism development and governance. The number of short-term tourist leases providers is increasing, but they are too poorly connected and barely participate in destination development.



**PRIVATE SECTOR-OTHER**

In the international setting, the fact that Ljubljana is not an internationally important/influential city has to be recognized. Consequently, relatively few **international corporations** decided to open smaller representations here and those do not influence urban development in any important way.

Numerous **Slovenian companies** operating nationwide which are not active in the areas of tourism development and governance have their headquarters in Ljubljana.

Numerous **small and medium-sized companies** operating at the regional level have their headquarters in Ljubljana but are not active in the areas of tourism development and governance.

A large number of innovative **micro companies** in the city positively influence the number of business tourists. However, these companies are poorly connected and not active in the areas of tourism development and governance.



**DEVELOPMENT POLICIES**

Participation in international tenders and projects could be more frequent.

National development strategy does not emphasize urban tourism.

At the regional level, development strategies covering urban tourism do exist and aim at expanding the tourism offerings from the city of Ljubljana to Ljubljana urban region as a whole.

Sustainable urban development strategy at the local level does not deal with the challenges of tourism development in an adequate manner.



**TOURISM POLICIES**

At the international level, no tourism policies mention tourism in Slovenia or Ljubljana.

National tourism strategy does not deal with the challenges of urban tourism development in an adequate manner. Despite its apparent 'sustainable' focus it primarily aims to generate tourism growth.

There is no tourism strategy at the regional level.

While the local strategy mentions measures to deal with tourism challenges, its narrow qualitative goals include increase in number of tourists and daily visitors as well as increased demand for tourist services.



**SPATIAL PLANNING**

In the international spatial plans Ljubljana only figures as (highway and railway) hub. Tourism is not mentioned.

Presently valid national spatial development strategy (a new one is being prepared as we write) only sparsely addresses urban tourism; the same goes for other related planning documents.

There is no spatial planning at the regional level.

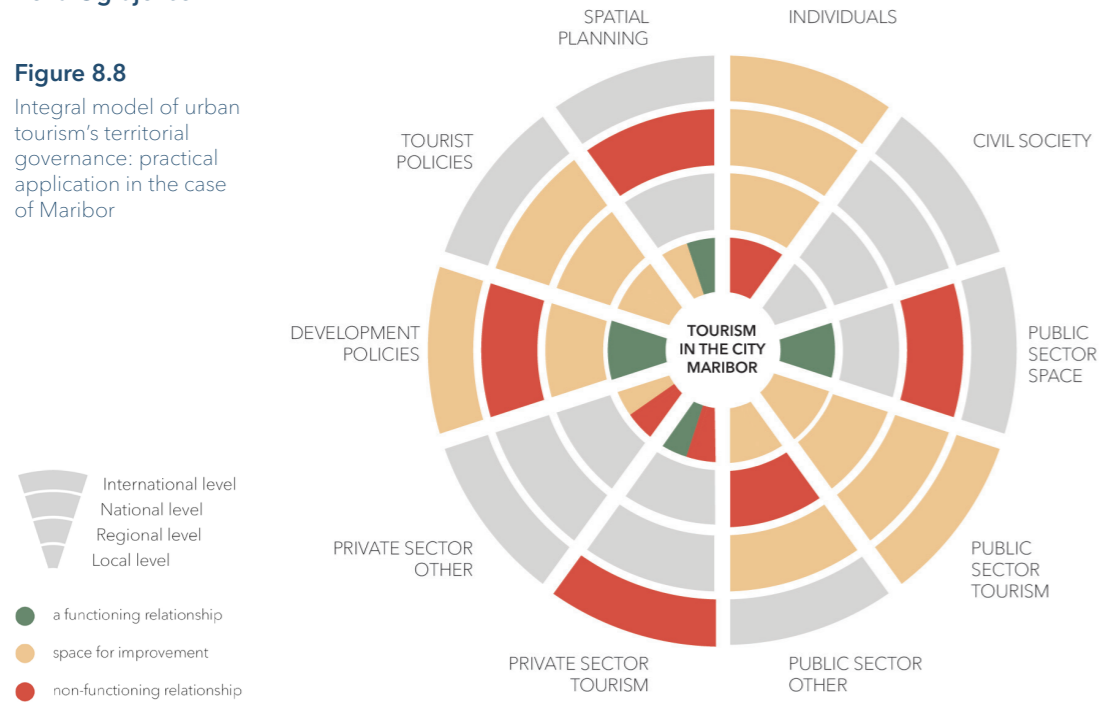
While the local spatial plans mention tourism, the approach is far from integral and negative effects of tourism remain almost entirely unacknowledged.



## 8 Territorial governance of urban tourism

Figure 8.8

Integral model of urban tourism's territorial governance: practical application in the case of Maribor



### INDIVIDUALS

Internationally, destination is poorly known. **Foreign tourists** come predominantly for daily visits and shorter stays.

Low level of **domestic tourists'** interest in destination unless related to exceptional (sports or local customs) events.

**Daily visitors** primarily come to participate in activities, which are not part of tourism. This causes and aggravates the problem of non-sustainable mobility.

**Local inhabitants** have no sentiments towards, and do not participate in governance of, urban tourism.

### CIVIL SOCIETY

Civil society is sparsely active (and even then only at the local level), and does not participate in tourism development activities.

### PUBLIC SECTOR–SPACE

Maribor does not participate in spatial planning at the international level.

**National economic stakeholders** are poorly engaged in dealing with the spatial effects of urban tourism.

Spatial planning at the **regional level** is non-existent.

Tourism is addressed in **local spatial plans**.

### PUBLIC SECTOR–TOURISM

Although a poorly known small tourism destination, Maribor is included in the ECM.

Slovenian Tourism Board does not pay special attention to Maribor.

At the regional level, the focus is on the development of micro-destinations instead of increasing collaborative efforts.

Destination marketing activities are successful; there is still room for improvement.

## Urban Tourism in Slovenia: Characteristics and Governance

## Section B

### PUBLIC SECTOR–OTHER

No specific initiatives at the international level.

Tourism is poorly represented; specifically demonstrated in the area of education.

The regional level in Slovenia is non-existent. This deficit is, to a certain extent, addressed by the regional development agency, but it fails to lead more prominent integral tourism-related activities at the regional level.

Digitalisation activities are starting to gain in importance; there is room for improvement.

### PRIVATE SECTOR–TOURISM

Private ownership and management have a negative effect on collaborative efforts in the area of tourism; interests of international and national companies to invest in the destination is non-existent.

At the regional level, there are no tourism companies.

Private sector functions in a partial manner; consequently, any synergetic effects are non-existent.

### PRIVATE SECTOR–OTHER

There are no large and influential private companies co-creating (tourism) urban development.

Local micro companies are not collaborative and they participate poorly in destination development efforts.

### DEVELOPMENT POLICIES

Participation in international tenders and projects could be more frequent.

National development strategy does not emphasize urban tourism.

At the regional level, (draft) regional development programme for Podravje recognizes the issue of poor collaboration among municipalities and destinations; mentions no relevant development measures.

Sustainable urban development strategy at the local level does exist and deals with the challenges of tourism development in an integrative manner.

### TOURISM POLICIES

At the international level, no tourism policies mention tourism in Slovenia or Maribor.

National tourism strategy does not deal with the challenges of urban tourism development in an adequate manner. Despite its apparent 'sustainable' focus it primarily seeks to generate tourism growth.

Tourism strategy at the **regional and local level** is older but still relevant for some aspects of spatial development related to urban tourism (sports infrastructure, hotel accommodation capacities).

### SPATIAL PLANNING

Maribor does not figure in any international spatial plans.

Presently valid national spatial development strategy (a new one is being prepared as we write) only sparsely addresses urban tourism; the same goes for other related planning documents.

There is no spatial planning at the regional level.

Spatial planning at the local level needs newer strategies and policies; the existing ones do not deal with tourism in an adequate manner.

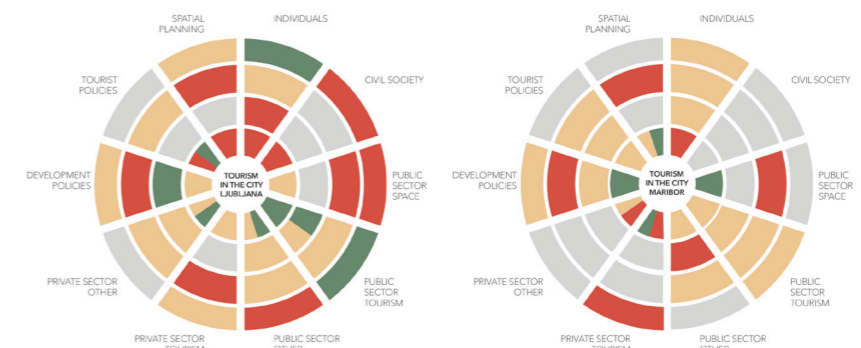


Figure 8.9

Integral model of urban tourism's territorial governance: comparison of Ljubljana and Maribor

### 8.6 Selected examples of good practices

How should stakeholders approach dealing with the weak points defined in our integral model of urban tourism's territorial governance? One sensible way forward would be for them to adopt and implement governance strategies and measures for the sustainable development of their locality. Table 8.4 summarizes WTO's (2018) measures to deal with both overtourism (a hot pre-pandemic topic), and improving the quality of life of residents via targeted infrastructural improvements. A lot of emphasis is given to the dispersal of visitors within cities and beyond their borders as many European historic city centres are overcrowded and have, as a result, become very uncomfortable living spaces for their local residents. Other measures promote a time-based dispersal of visitors, the development of new tourist itineraries, and the adaptation of regulations. It is also important to promote measures that will facilitate the peaceful co-existence of tourists and residents.

**Table 8.4**

Selection of governance strategies and measures targeted at unwanted growth of urban tourism (Adapted after UNWTO, 2018)

	Strategy	Measures
I	Promote the dispersal of visitors within the city and beyond	01 Host more events in less visited parts of the city and its surroundings 02 Improve capacity of and time spent at attractions 03 Create joint identity of city and its surroundings 04 Implement travel card for unlimited local travel 05 Mark entire city as inner-city to stimulate visitation of less visited parts
II	Promote time-based dispersal of visitors	06 Promote experiences during off-peak months 07 Promote dynamic pricing 08 Set timeslots for popular attractions and/or events aided by real-time monitoring 09 Use new technologies (apps and others) to stimulate dynamic time-based dispersal (real time display of waiting lines for attractions, average duration of visit for any specific attraction, suggestions for visits of alternative attractions)
III	Stimulate new visitor itineraries and attractions	10 Promote new itineraries at the city entry points and through the visitor's journey, including at tourist information centres and along the usual visitor paths 11 Offer combined discounts for new itineraries and attractions 12 Produce city guides and books highlighting hidden treasures 13 Create dynamic experiences and routes for niche visitors 14 Stimulate development of guided tours through less-visited parts of the city 15 Develop virtual reality applications to famous sites and attractions to complement onsite visits
IV	Review and adapt regulation	16 Review opening times of visitor attractions 17 Review regulations on access for large groups to popular attractions 18 Review regulations on traffic in busy parts of the city 19 Ensure visitors use parking facilities at the edge of the city (promote visitors' use of park-and-ride facilities) 20 Create specific drop-off zones for coaches in suitable places 21 Create pedestrian-only zones 22 Review regulation and taxation on new platform tourism services (sharing economy, apps) 23 Review regulation and taxation on hotels and other accommodation 24 Define the carrying capacity of the city and of critical areas and attractions etc. (number of tourist beds, visitors, pre-defined zones and attractions, number of companies from different categories, etc.) 25 Consider an operator's licence system to monitor all operators (agencies, travel organizers, tourist guides, etc.) 26 Review regulations on access to certain areas of the city for tourist related-activities

V	Enhance visitors' segmentation	27 Identify and target visitor segments with lower impact according to the specific city context and objectives 28 Target repeat-visitors 29 Discourage visitation of the city of certain visitors segments
VI	Ensure local communities benefit from tourism	30 Increase the level of employment in tourism and strive to create decent jobs 31 Promote the positive impacts of tourism, create awareness and knowledge of the sector amongst local communities 32 Engage local communities in the development of new tourism products 33 Conduct an analysis of supply-demand potential of the local communities and promote their integration in the tourism value chain 34 Improve quality of infrastructure and services considering residents and visitors 35 Stimulate development of impoverished/less developed/neglected neighbourhoods through tourism
VII	Create city experiences that benefit both residents and visitors	36 Develop the city to fit with residents' needs and desires, and consider tourists as temporary residents 37 Develop tourism experiences and products that promote the engagement of residents and visitors 38 Integrate visitor facilities within local festivities and activities 39 Create and promote local city ambassadors 40 Promote art and culture initiatives such as street art to provide fresh perspectives on the city and expand visitation to new areas 41 Extend opening times of visitor attractions
VIII	Improve city infrastructure and facilities	42 Create a city-wide plan for a well-balanced, sustainable traffic management 43 Ensure that major routes are suitable for extensive tourism activity and that secondary routes are available at peak times 44 Improve urban cultural infrastructure 45 Improve directional signage, interpretation materials and notices 46 Make public transport better suited for visitors 47 Set up specific transport facilities for visitors during peak periods 48 Provide adequate public facilities (for example public toilets, Wi-Fi) 49 Set up specific safe and attractive walking routes, create safe cycling routes and stimulate bicycle rentals 50 Ensure that routes are suitable for the physically impaired or elderly visitors in line with accessible tourism principles 51 Safeguard quality of cultural heritage and attractions 52 Ensure cleaning regimes fit with tourism facilities and with peak times
IX	Communicate with and engage local stakeholders	53 Ensure that a tourism management group (including all stakeholders) is set up and is regularly convened 54 Organize professional development programmes for partners (for example taxi drivers, hotel employees, etc.) 55 Organize local discussion platforms for residents 56 Conduct regular research among residents and other local stakeholders 57 Encourage locals to share interesting content about their city on social media 58 Communicate with residents about their own behaviour 59 Unite disjointed communities (for example with creation of inter-quarter communities)
X	Communicate with and engage visitors	60 Create awareness of tourism impact amongst visitors 61 Educate visitors as to local values, traditions, and regulations 62 Provide adequate information about traffic restrictions, parking facilities, fees, shuttle bus services, specific characteristics of public transportation, etc.
XI	Set monitoring and response measures	63 Monitor key indicators such as seasonal fluctuations in demand, arrivals and expenditures, patterns of visitation to attractions, visitor segments, etc. 64 Advance the use of big data and new technologies to monitor and evaluate tourism performance and impact 65 Create contingency plans for peak periods and emergency situations (for example to deal with enormous numbers of visitors)



Further good practices which decision-makers could embrace include those from the European cities which competed for the title European Smart Tourism Capital in 2019 and 2020 (European Commission, 2022). Innovative measures were divided into four categories: accessibility, sustainability, digitalisation, and cultural heritage and creativity.

Good practice examples in sustainable development include:

- The city of **Breda (the Netherlands)** which was the first European city to use smart city lights to create the wanted (event-related) atmosphere, minimize light pollution, and save energy.
- The city of **Karlsruhe (Germany)** is famous for its 64.4 % green surfaces and its Energy Hill with solar cells. It plans to expand into wind energy, and to create a visitor pavilion with great vistas of the city and its surrounding areas.
- The city of **Gothenburg (Sweden)** uses rain as a means of cultural and artistic expression and also seeks to create public spaces (playfields and public pools).
- The city of **Lyon (France)** managed to successfully transform itself from a congress destination into a cultural, sports, and leisure destination within only a decade.
- The city of **Poznan (Poland)** successfully battles seasonality with its tourism initiatives "Poznan 50 % off" and "Summer at the Fair Compound" with free workshops for children that seek to boost their creativity.
- The city of **Tallin (Estonia)** successfully battles seasonality in a joint effort with Lonely Planet, and launched the campaign "Winter Tallin" in 2017.
- The city of **Turin (Italy)** prepared special guidelines for different categories of tourism suppliers (hotel, gastronomy, tourist guides, etc.) with some obligatory measures (such as serving tap water) and some additional non-obligatory ones (such as free bike parking).

Another series of good practices stem from cities which earned the title Green Capital of Europe (European Commission, 2022a). Stockholm was the first in 2010, followed by Hamburg, Vitoria - Gasteiz, Nantes, København, Bristol, and - in 2016 - Ljubljana. The latter being awarded the title both for its *Vision Ljubljana 2025* which targeted local residents' increased environmental awareness, and for greening the city (limiting traffic in certain areas, actively searching for green alternatives - measures which have also been critically discussed, see e.g. Poljak Istenič in 2016 and Maior in 2019).

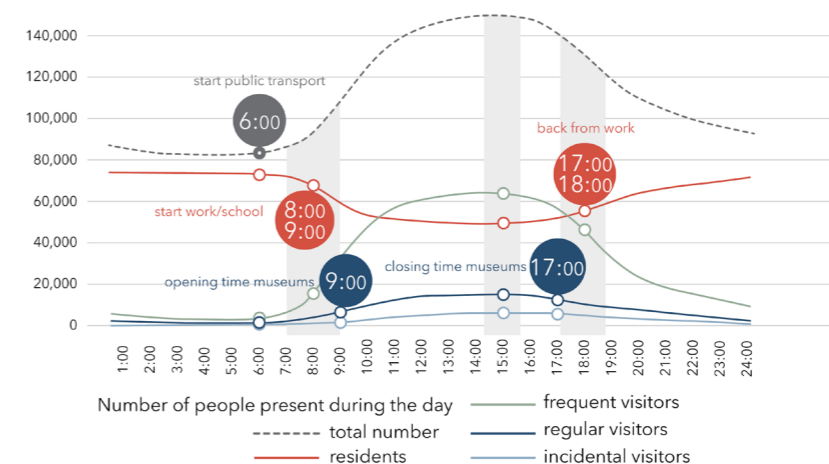
Further to the previously mentioned categories, others such as accessibility, local residents inclusion (at least information-wise), and management of tourism flows have to be mentioned. Some good practices in the area of accessibility include:

- the city cards of **Köbenhavn** (access to public transportation network and over 80 tourist attractions) and **Lyon** (all museums, all main tourist attraction, public transportation including access to the airport, guided tours in four languages and a series of further discounts);

- city helpers of **Helsinki** (youngsters speaking over 14 languages available to tourists for questions in tourist hotspots);
- as well as a dynamic and collaborative platform for impaired persons, developed in collaboration between Vodafone and PREDIF for the city of **Valencia**.

Also important is the management of tourist flows. Good practice examples include:

- the city map of **Turin** (which not only includes the distances between key tourist attractions, hotels, and other tourist facilities, but also calories burnt walking between them - see Commune di Torino, 2021);
- the targeted limitation of number of visitors allowed on a (given) premise at a specific time (already implemented in **Paris** for the Louvre and in Rome for the **Vatican** before the pandemic);
- virtual accessibility of tourist attractions (not just museums and churches but also theatre and other performances - streamed live or per demand, for example from Burgtheater and Staatsoper in **Vienna**);
- active campaigns for respectful cohabitation of tourists and residents (for example **#EnjoyRespectVenezia**);
- the targeted redirection of tourist flows (e.g. from the city centre of **Bruxelles** to all of the city's 19 districts via the MIXITY Walks initiative);
- tourist flow management in **Amsterdam** with adjustments of opening hours for key tourist attractions in order to avoid disruption of commuter flows to and from work (Figure 8.10).



**Figure 8.10** Number of people present in selected (museum) area of interest to tourists - focus of analysis is facilitation of an even flow of people throughout the day (Adapted after Municipality of Amsterdam, 2019)

## 8.7 Conclusion

There exist several documents that focus on approaches to territorial governance in urban communities (European Commission, 2000; WTTC and JLL, 2019; WTTC and MyKinsey, 2017; UNWTO, 2014; WTTC, 2019). Our research concludes that while the need for comprehensive territorial governance of (urban) tourism has been recognised and emphasized at different governance levels, this has not been followed up with targeted actions in practice. Newer urban management concepts such as the smart city and sustainability need to be embedded in tourism management. To date, they are recognized in theory but not yet implemented in practice. The same goes for the concept of resilience; there is a need for better risk management and targeted crisis response based on predeveloped scenarios.

In second-tier European urban destinations, concepts such as these should be seriously discussed by stakeholders, and a better system of co-operation between urban planning and the tourism sector e put in place. While integrative strategic planning seems to offer the right solutions for better connectivity of the sectors, participative planning is needed for the better integration of local inhabitants in tourism-related decision-making processes. Urban development should be managed in a more sustainable and responsible manner from the viewpoint of both local inhabitants and tourists.

Application of our integral model of urban tourism territorial governance to selected Slovenian urban destinations has also shown that national, regional and local authorities need to act in a more integrative manner and to develop realistic measures in cooperation with supply-side tourism stakeholders. This is important because there are companies of different size on the supply side: from self-employed entrepreneurs (e.g. tourist guides) to global tour operators. These individuals and organizations have completely different styles of operation and their ability to survive the stresses of the pandemic are also different.

Both top-down and bottom-up approaches are necessary, with authorities at all levels (national, regional, and local) needing also to understand the heterogeneity of supply-side tourism stakeholders and implement stimulating measures that target as many as possible and not just the selected few which might be too large to fail. When preparing for tomorrow, the best way forward for the tourism sector is to be proactive. The best preparation for tomorrow would appear to be to develop strategic plans for urban destinations which will make them attractive for tourists while at the same time facilitating sustainable living for residents. In this process, our integral model of urban tourism's territorial governance could be used to facilitate a comprehensive analysis of the current state of affairs before urban destinations move forward to first determine and then (hopefully successfully) implement their performance targets.

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## Chapter 9

### **Towards new urban tourism**

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## 9.1 Introduction

Since the first project application on the topic of urban tourism in 2016, research on urban tourism has made significant progress, both at European and global scales. This is evident from the vast list of topics and innovative approaches that have been used to tackle research questions in the field. In particular, new forms of digitalised tourist offers and promotion via social media have facilitated new sources of data (Ahas et al., 2008; Bander, 2015; Van der Zee et al., 2020; Vu et al., 2020). The research idea that Slovenian urban tourism also requires in-depth research, especially concerning Ljubljana as a major destination, was confirmed as an appropriate one. This has also been illustrated in the increase in the number of articles on urban tourism in Ljubljana published over the last five years (Božič et al., 2017; Grah et al., 2020; Kerbler and Obrč, 2021). The launch of the MESTUR project in 2019 and the SPOT project in 2020 provided good starting points for observing and monitoring the situation of urban tourism during the pandemic. Both projects financially supported surveys of visitors in 2020 and 2021, residents in 2020, and surveys and interviews with tourism service providers in 2020 (Klepej et al., 2021). These surveys provided the first and therefore very important snapshot of the situation in urban tourism before the changes (in the record year of 2019) and after the changes that arose as a consequence to the pandemic. A time plan of project activities in both cases provides insight into the dynamics of the pandemic's impacts and also helped in the identification of the weak(ened) links in the development of urban tourism, as well as the possibilities that existed with regard to the promotion and upgrading of activities which were identified as valuable and important.

Furthermore, the MESTUR and SPOT projects were examples of good practice in interdisciplinary approaches to surveying urban tourism, and brought together researchers from various fields, both during methodology selections and the creation of conclusions. Projects have relied on knowledge from various fields including the economy, sociology, landscape architecture, geography, as well as wide ranging data resources (tourists, residents, local communities and other users of space), and a plethora of methodological approaches (a mixture of quantitative and qualitative methods, with a multitude of different locations and spaces of inquiry). The projects were able to create multilevel and multi-structured answers to questions about individual research topics. These answers were derived from various scientific approaches, and offered comprehensive/holistic settings for building on existing policy documents; including their objectives and guidelines. To best summarise the outcomes of both projects, we used six theses and subchapters in accordance with the topics addressed by the two projects.

## 9.2 Urban tourism presents a well distinguished and rapidly changing type of tourism

The second chapter of this monograph confirms the hypothesis that in the 21<sup>st</sup> century, urban tourism has established itself as one of the most important types of tourism. With its clearly defined characteristics, tourist profiles, stakeholders, multiple impacts, and rapid growth - abruptly interrupted in the record year of 2019 - it presents a relevant segment of travel at global, European, and Slovenian levels. In a way, urban tourism is a superset of the types of tourism that derive from the destination itself - cities; within it, we define a number of sub-segments including: cultural, congress, culinary, festival, dark, and other types of tourism.

While the pattern of short, weekend trips to cities as one of the main forms of travel for this type of tourism has been maintained, the motives and demands of urban tourists have changed in last 10 years. We are no longer talking about classical cultural tourists who visit cities to see cultural sights and heritage, but about urban tourists who want to 'become residents' and enjoy an authentic experience in the (given) city. Most often, this experience is connected with authenticity, experience, and place-based tourism. Nientid (2020) has named this type of tourism "new urban tourism" which was also among the main focus of the SPOT project. Although, in theory, authors are not yet sure whether this is indeed a new type of urban tourism or just a different naming for local offers and tourists' motives, this departure from previous travel patterns can be confirmed by existing surveys. In these surveys, tourists mentioned their interest in seeing architecture, enjoying quality open spaces, experiencing the city, and exploring the "non-touristy" parts of cities. In a way, such experiences have also been further facilitated by the sharing economy, whereby the tourist enters the 'local's apartment' and thus increases the authenticity of their experience. Changes in urban tourism have also been brought about by the pandemic; it has led, in particular, to a shift from group to individual travel, as well as to a rise of new tours that offer outdoor experiences. It can be concluded that urban tourism is subject to constant changes that arise from various, not necessarily just tourism factors, but in particular the very characteristics of the destination itself and its urban development as well as related global trends.

## 9.3 Urban tourism has established itself as an important type of tourism in Slovenia

Both cities' profiles and the comparison of Ljubljana and Maribor with other Central European destinations have revealed that urban tourism is statistically competitive with other types of tourism, such as spa, mountain, and seaside tourism. According to the national statistical office (SURS), tourist municipalities are categorised into six categories: Ljubljana, health (spa) resorts, mountain resorts, seaside resorts, urban municipalities and other municipalities. This can be seen in Figure 9.1,

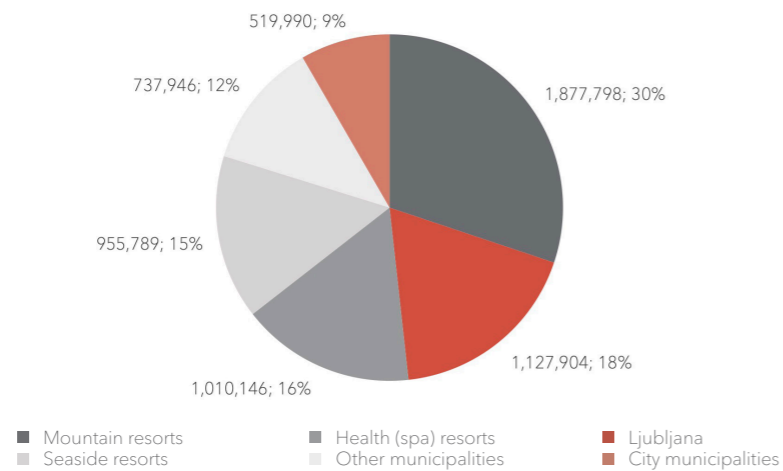


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where Ljubljana's share of tourist arrivals is 18.1%, or 1.1 million in absolute numbers. This share is even higher than the one for health (spa) resorts, which traditionally had one of the highest shares. Slovenia as a whole recorded 6,229,573 tourist arrivals in 2019. If we add together the numbers who visited Ljubljana and other urban municipalities, we obtain a share of 26.5% which is almost equal to that of the mountain resorts which are in the first place with 30.1% share. The statistics pertaining to overnight stays show a different picture; urban municipalities lag behind health resorts and accounting for only 20.7% of all overnight stays, of which Ljubljana generated 14.1% and other urban municipalities 6.6% (SURS, 2022; Figure 9.2). In total, there were 15,775,331 overnight stays in Slovenia in 2019.

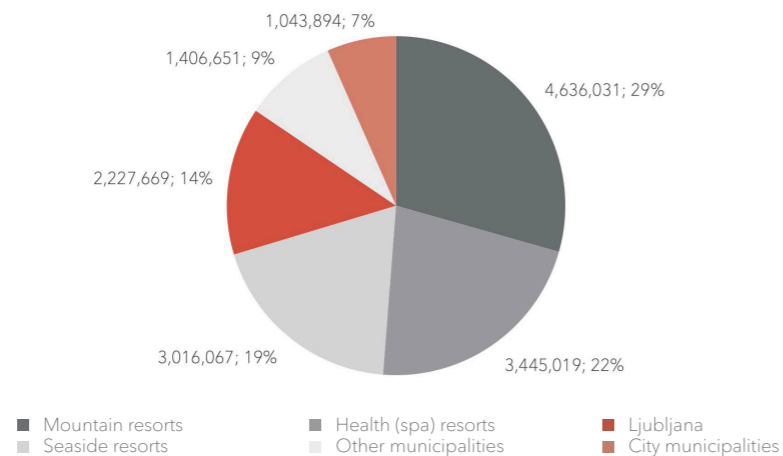
**Figure 9.1**

Share of Ljubljana and other urban municipalities in tourist arrivals in 2019 (SURS, 2022)



**Figure 9.2**

Share of Ljubljana and other city municipalities in overnight statistics in 2019 (SURS, 2022)

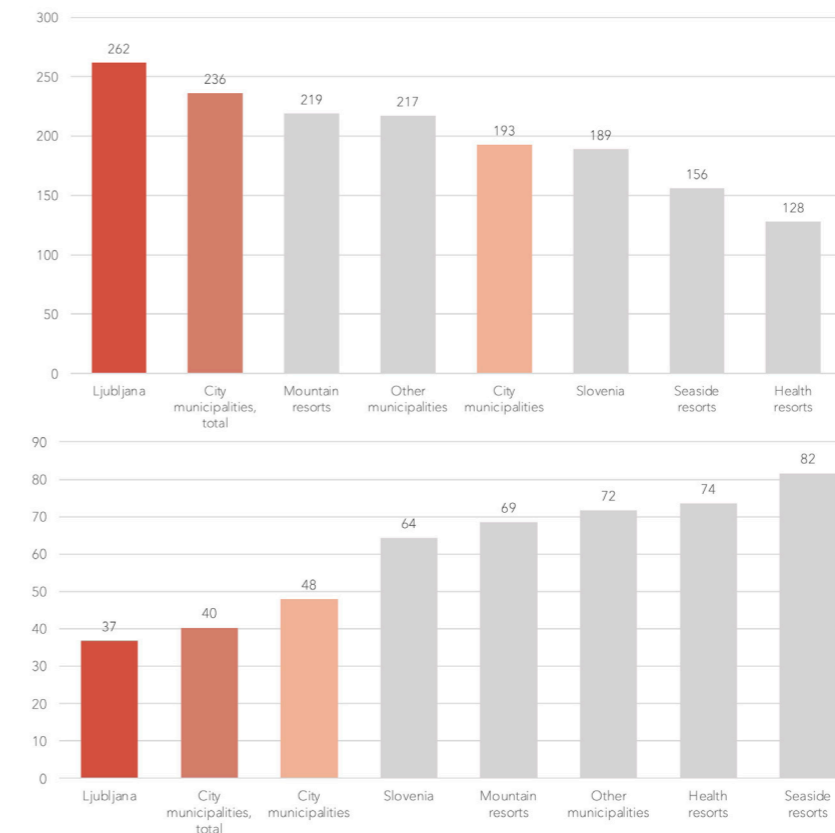


A look at the statistics for individual municipalities also shows that the City Municipality of Ljubljana was in first place in terms of tourist arrivals and overnights stays. In 2019, the City Municipality of Ljubljana accounted for 7.6% of all bed capacity in Slovenia, 8.3% of all tourists' arrivals, and 6.6% of all overnight stays (SURS, 2022). Urban tourism is

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## Section B

a winner as well with regards to the number of tourist arrivals in the period 2010 to 2019 (see Figure 9.3), with the capital city again standing out. The index of arrivals to Ljubljana reached a value of 262, while other urban municipalities reached a score of 193. At a Slovenian level, the index score was 189. If the growth of tourism in urban municipalities in the ten-year period before the pandemic was record-breaking, then the index calculated for the period 2019-2021 showed a corresponding decline. The index of arrivals for the period 2019-2021 is devastating. As shown in Figure 9.3, the index for Ljubljana was 37, and for other urban municipalities it was 48. The latter had a higher index because they were less dependent on foreign tourists than the capital city.



**Figure 9.3**

Index of arrivals according to the type of destinations in the period 2010 to 2019 (SURS, 2022)

**Figure 9.4**

Index of arrivals according to the type of destinations during the pandemic, 2019-2021 (SURS, 2022)

Another distinctive feature of urban tourism in Slovenia is that it is dominated by foreign tourists, while domestic visitors most likely come to cities for day trips. Foreign tourists in 2019 accounted for 91% of all tourists and 92% of all overnight stays, with both numbers being well above both the national average (75% arrivals, 72% overnight stays) and shares in other categories of tourist municipalities. Shares were even higher in the City Municipality of Ljubljana, where foreigners represented 94.8% of tourists and 95.6% of overnight stays. This proved to be a particular weakness later on during the pandemic. In the light of the statistical analysis, it can be concluded that, before the pandemic, urban municipalities experienced rapid growth in tourism and through so doing established themselves as important Slovenian tourism destinations.

#### 9.4 Urban destinations are developing at different rates, regardless of their size

The activities from both projects enabled us to gain insights into the development of different urban destinations in Slovenia as well as in Central Europe and the rest of Europe. We found that these destinations are at very different stages of development in terms of the number of arrivals that they receive, the structure of tourists, their tourist offers, the planning of tourist development, and the scale of the impacts of tourism activity. We could distinguish between destinations that primarily target domestic tourists, e.g. Torino and Nitra, and those where a majority of tourists are foreign (e.g. Ljubljana and Barcelona). Furthermore, there is also a difference in tourist offers – some cities are still promoting their cultural attractions and heritage, while others have successfully refocused their approach to emphasise the urban atmosphere and the lifestyle which a tourist should encounter in the most authentic way.

In a European context, Ljubljana and Maribor belong to the category of medium-sized cities; this does not limit them with regard to their development of tourist offers. The offers available in both cities cover the main tourist attractions related to the culture and the history of the two cities, while at the same time developing other types of urban tourism. Congress and business tourism are two such types that both cities are seeking to build on, however, capacities presently limit their further development. Despite existing hotel and other capacities for larger events existing, even new accommodation developments do not offer competitiveness with larger urban destinations. The same can be said of culinary tourism, for which intensive promotional activities (events, other activities) have been carried out, however, global recognition in the form of Michelin stars has only latterly been forthcoming.

The size of individual cities has not been recognised as limiting the quality of tourist offers available. Data analysis shows that listed protected heritage, the small heterogeneity of spaces, population density, and green systems (natural features) create an effect of exceptional attractivity (very often described as charming or 'cute') for different groups of tourists. In this context, tangible cultural heritage (in terms of architecture, urbanism, urban equipment) stands out as a key feature of urban tourism offer.

The MESTUR project analysis revealed that foreign tourists in particular perceive non-material cultural offers as a less attractive element of Slovenian cities. For example, foreign tourists are significantly less favourable towards the offer of events which definitely increase the quality of life in the city for local residents. They also observe the urban tourism offer as extremely homogeneous. As a result, exploitation of the ambient, aesthetic and physical potentials of the city (centre) should be emphasised to a greater extent in promotional material.

In both projects we investigated Ljubljana in detail, in the MESTUR project was also deeply investigated as was, to a lesser extent, Graz in Aus-

tria. According to Butler's life cycle of destinations, Ljubljana and Maribor are certainly in two different phases of development (Butler, 2006), which is also reflected in the different spatial extent of the cities' touristification. While Ljubljana can be identified as a mature destination which, in 2019, almost reached the tipping point into overtourism (see Chapter 3 for more detail), Maribor can be identified as a developing city destination (see, for further, Chapter 4). For Ljubljana, this phase can be confirmed by the 2019 survey, and the general discussion (also in the media) about the measures needed to address the overtourism issue. In addition, public opinion about the contribution of urban tourism to the quality of life in Ljubljana was not necessarily only positive from 2019 onwards. In contrast, the tourist offer in Maribor is still being developed and attempts are being made to adapt the city to the demands and needs of the tourism market.

#### 9.5 Urban tourism causes impacts on the society, economy, environment and spatial planning, and (territorial) governance

Impact assessment, performed based on Territorial Impact Assessment (see Chapter 5), addressed four thematic fields; namely, society, economy, environment and spatial planning, and governance. First, a qualitative analysis was carried out through brainstorming, which was then supported by indicators and numeric assessment. While the qualitative assessment provided a wide list of potential impacts, the numeric assessment confirmed or denied the presumptions. The most positive impacts were detected in the fields of society and economy, and the most negative ones in the fields of environment and spatial planning. Since urban tourism interferes with the complex urban system, it has the most multiplicative impacts of all types of tourism on the economy; both positively and negatively.

Among the negative impacts, the high prices of rental or purchasing real estate have been the most problematic from the point of view of residents. In particular, the intensive development of the shared economy and the possibility of renting apartments on AirBnB contributed to this problem, and at the same time limited rental options for residents. With regard to environmental problems, emissions from car traffic are most alarming since residents and tourists still use cars as their main means of transport to/within Ljubljana. The underdeveloped public transport system outside of the city's core areas also contributes to this and further discourages tourists from using it.

Impacts were assessed not only for the period before pandemic, but also during it. Previously identified impacts were re-evaluated in the light of the pandemic. It was found that during and immediately after the pandemic, the reduction of tourism activity improved the negative impacts in the arena of environment and spatial planning. However, the positive economic and social impacts of tourism were reduced.

## 9.6 Cultural tourism is significant to the local community

In the SPOT project we looked in more detail as to the extent to which inhabitants of Ljubljana are connected to cultural tourism, to what extent they benefit from the tourist offers, and what is its added value to their life quality. We discovered that the local community has an extremely positive attitude to cultural tourism since all who participated in the survey were positive in this regard in their responses. The knowledge of local inhabitants is mostly limited to classical cultural offers, museum, galleries and events; architecture and open spaces were not mentioned much. According to their opinions, cultural tourism contributes to a livelier city atmosphere and increases the possibilities for work as well as the variety of cultural offers available. 22% of participants in the survey claimed that the contribution of cultural tourism to the city was very big; in addition, 56% were of opinion that the impact is big. Only 2% of inhabitants marked the impact as being negative. As very beneficial to their quality of life they have claimed also spontaneous exchange between the inhabitants and tourists in connection to the cultural exchange between the local and global. Locals emphasised that they are willing to help tourists who are stopped on streets with regard to providing some advice and/or directions. Until now, this was only undertaken frequently by one quarter of participants in the survey, and very frequently, by one tenth of them. Only 12.8% were not content with the fact that tourists are part of the city's life (Klepej et al., 2021).

As a downside to the cultural offers, they reported that cultural offer suppliers do not offer any special discounts for the local community; 59% of participants have not received any discount to visit a cultural institution or event. In this way, inhabitants do not really benefit from the spatial accessibility of the cultural offers. Local inhabitants are only eligible for the same type of discount as tourists if they fall under one of the general categories such as: students, pensioners, school groups, functionally disabled and unemployed, and not because of their domesticity. This did however change during the pandemic, when the cultural institutions discovered they only had the locals left as potential visitors. As a result, in the summer of 2020, they established a package ticket with which the locals were able to visit 11 museums for the price of 8EUR (an individual ticket) or for the price of 16EUR (family ticket).

As Table 9.1 shows, the relationship between cultural tourism and inhabitants can be evaluated as positive. The relationship is symbiotic since not only inhabitants enjoy cultural offers, but also communicate and promote it in a peer-to-peer manner to the tourists. Concerning the price offers for inhabitants, some improvements are still possible, especially concerning night life and festivals. Even closer to inhabitants is the current project focused on the Ljubljana's cultural quarters which is seeking to decentralise cultural offers into those neighbourhoods which surround the city centre, including Šiška, Bežigrad and Metelkova. These quarters would also form a hub for artists, and inhabitants, as well as domestic and foreign tourists.

	Most frequent answers	Least frequent answers
<b>General development</b>	Better promotion and recognisability of the city (16) Enriched gastronomy (12) Renovation projects and more respect for the local tradition and history (9)	Building renovations (1) Safer town (2)
<b>Economic development</b>	Employment opportunities (17) Richer local offer of services (9)	Higher prices of properties (1) Higher value of collected taxes (3)
<b>Tourism development</b>	Various cultural events (29) Increase in cultural offer (25)	Increase in visitor numbers (1) Promotion of local food (2)
<b>Social life</b>	Higher quality of life (11) Openness and friendliness of local inhabitants (10)	Increased Europeanisation (1) Broadening horizon (4)
<b>Spatial development</b>	Accessibility of the city (information, areas) (27) Diverse city (16) Walkable city (16)	Decreased quality of landscape (1) Closeness of the natural areas (2)

**Table 9.1**

Added value of the cultural tourism for the city and its inhabitants (Klepej et al., 2021, p. 58)

## 9.7 Urban destinations are not prepared and resilient for crisis events like pandemics

As we have learnt in the last two years, urban tourism represents one of the types of tourism that, in short- to middle-term period, is most exposed to crisis events. The Covid-19 pandemic has left the largest impact on the group of city municipalities in Slovenia, since visitor numbers decreased most in this category (Marot et al., 2021). Between the years 2019 and 2021 the number of tourists visiting urban municipalities decreased by 59.7%, and the number of overnight stays by 55.6%; largest decrease among all types of tourist municipality. An even larger decrease occurred in the City Municipality of Ljubljana, where the number of tourists decreased by 63.2%, and the number of overnight stays by 61.1%. Because of this decline Ljubljana lost its 'first place' position among municipalities for both of the indicators.

Before the pandemic, urban tourism development was not so much focused on sustainable tourism, instead constant growth of the sector was in focus. During the pandemic it became evident that most business models of urban tourism (and especially congress and event tourism in this context) are unsustainable and non-resilient. Such models are, in the long term (especially in the Slovenian context which does not benefit from frequent flight connections to the rest of the world), almost destined to fail. In addition, measures of economic policy connected to the objective of increasing demand for tourist products and services were recognised as unsustainable for urban destinations. Furthermore, analysis of existing strategies has shown that cities do not, with the exception of issues pertaining to terrorist attacks, have strategies which enable them to adapt to sudden changes. During the pandemic, the tourism sector lost educated staff, individuals with competences, and suppliers of the special tourist products and services. As the interviews with suppliers revealed, the crisis brought positive solutions, among



which the renovation of hotel accommodation and infrastructure, the digitalisation of cultural offers, and consideration of the future development of tourism and tourist infrastructure may be emphasised.



**Figure 9.5**  
Ljubljana before the state closure, in between and afterwards (above) and Maribor before the state closure, in between and afterwards (below) (Author: David Klepej)

### 9.8 In cities, tourism activities are highly spatially concentrated due to a gap in comprehensive territorial governance

Primary analysis done before start of the project has shown that spatial aspects of tourism have, until now, only been investigated in a limited manner. While individual studies, dedicated to the analysis of site visits with different methods (surveys, social data analysis) are pretty common, studies connecting spatial planning and tourism are rare. Among such studies one should mention Rahmoun, Zhao and Hassan (2019) who elaborated regional and integrative approaches to plan seaside tourist paths, and Hatt (2022) who addressed the gap of integrating tourism into spatial planning in France. Furthermore, Uğur (2016) claimed that the main challenge of the integrative approach is to discover why there is a gap between tourism development and urban planning practice. This topic has also been addressed by de Noronha Vaz and others (2011), López Sánchez, Linares Gómez del Pulgar and Tejedor Cabrera (2021) and Tsilimigkas, Gourgiotis and Derdemezi (2022).

Due to this gap one of the main objectives of the MESTUR project was to analyse the spatial dimension of urban tourism and its territorial governance. By applying the concept of territorial governance we wanted to address the question of the extent to which the two sectors co-operate with each other and how well they consider each other in planning and implementing development policies.

Analysis of the spatial characteristics of the urban tourism was performed using various approaches. For both cities we analysed the spatial distribution of tourism promotion (printed guidebooks, blogs) and via a workshop we evaluated the touristification of the individual quarters of Ljubljana and Maribor. It was revealed that tourist offers are densest in the two city cores; also the most touristified parts of the two cities. Analysis of the spatial paths revealed tourists who visit solely the city centre and the tourist who, besides the centre, visit also other parts of the city. Overflows of tourist activities into the neighbourhoods outside the two city centres only happens to a limited extent in both Ljubljana and Maribor with the latter also exhibiting greater unused potential.

Tourism development is also measured via the dynamics of constructing new infrastructure. According to the overview of projects in the field of infrastructure both cities are especially active in the development of new capacities. New accommodation capacities are mostly in the category of hotels and similar units which provide not only beds but also venues for larger events or tourist services such as souvenir shops. One of the issues related to the integration of tourism and spatial planning is urban renovation efforts where debate mostly revolves around 'what the target is': are these projects aimed at raising the quality of life of local inhabitants or are they planned to beautify the city primarily for tourists.

Our policy analysis has shown that tourism is included into spatial plans development documents to only a limited extent; predominantly as objectives of other sectors (culture, the economy). Additionally, we identified objectives of other cities according to what scale of tourist infrastructure they plan, what growth of tourism they aspire to, and what role they believe that tourism should play in their urban development. Development policies do not stress enough that on one side tourism needs space for its development, while on the other, urban space, as the surveys have shown, at the same time represent one of the key tourist attractions of the city.

To conclude, inhabitants should be more actively integrated into spatial and tourism development. Further on, the added value of tourism for the quality of life of inhabitants should be more emphasised, both, in the policy making and implementation of the tourism-related projects.

### 9.9 Concluding thoughts

The MESTUR and SPOT projects started at just the right time during the record tourist year of 2019. After that a sectoral crisis arrived in 2020 which brought challenges for both the research and management of urban tourism. Both aspects, the growth and decline, we have addressed in the two projects, however, the research plans have needed to be adapted due to the situation in a way that still allowed fulfilling the primarily objectives of the project. In MESTUR, the main idea was to investigate and learn about the spatial dimensions of urban tourism by using statistics, descriptive and spatial analysis; whereas in SPOT we



revealed the new realities of cultural tourism which could not really be seen before the projects started.

Most of our conclusions are introduced in this book intended for researchers, students, employees in tourism, policy makers and others, anyhow involved with urban tourism. The character of the book strongly reflects the multidisciplinary and multidimensionality nature of the tourist sector. In the performed analysis we have aspired to analyse the potential impacts of the development of overtourism in the city and what this means for urban development. In the field of territorial governance we have tried to disclose connections between the proportionally non-connected stakeholders, services, institutional actors and other mechanisms and integration methods (focus groups, workshops, interviews, visual analysis of the movement, cognitive maps) to prepare the governance model that would help to boost the role of actors in the direction of integrative and resilient operation of tourism sector. As stakeholders' analysis has shown, not only should the roles of some of the stakeholders be strengthened, but also the vertical co-operation between them. Integrative planning and better territorial governance can result in more effective and sustainable solutions for the cities.

Whilst a range of research questions have been answered in this work, the research has also raised new ones. One of these questions is relevant for the development of urban tourism in other urban destinations such as Kranj, Celje and Koper. Field observations and analysis of web pages demonstrate that these cities are renewing their tourist offers and promotion to address the needs of the so-called urban tourist who is aiming for experience of authentic urban life. One of the co-authors of this publications has suggested that there is a need for detailed analysis of the attraction factors of urban tourism for foreign tourists as this would help to identify weaknesses within the homogeneous tourist-cultural offers presently advanced by Ljubljana and, potentially, other Slovenian towns. In addition, several new research questions arose as a consequence of the pandemic including, for example, what is the impact of urban tourism on virus spread, what are the characteristics of urban tourist in times of crisis, and what are the characteristics of successful crisis management in urban tourism. Furthermore, good practices of tourism management should be listed and exchanged, new business models of (urban) tourism should be described, so should be the digitalisation process of urban tourism, sped up because of the pandemic, and how this will impact cultural, congress and fair tourism in the future. All these questions were identified and could serve as fertile ground for future research endeavours.

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# Summaries of the chapters

## 1 Introduction

Naja Marot  
Matjaž Uršič

Urban tourism has been one among the fastest growing types of tourism in the 21<sup>st</sup> century. However, tourists are no longer only interested in cultural tourism, they also like to undertake authentic urban tourism experiences. As a result, they have oriented themselves from primary destinations in Europe such as Paris, London, Vienna and so on, to second level cities such as Ljubljana and Maribor. Prior to the pandemic, these two cities, encountered one of the highest and fastest growths of arrivals and bednights within central Europe. Whilst cities have worked heavily on their self-promotion through titles such as the Green Capital of Europe, they have not considered tourism development comprehensively. As a result, the rapid development which they have experienced has not only resulted in a higher number of tourist arrivals, but also had a wide range of impacts that affected local society, economy, environment and territorial governance.

The impacts of urban tourism and the new realities of the cities have intrigued researchers and has led them to refocus their research on the cities as well on urban tourism. As several of them have argued, urban tourism research requires multidisciplinary approaches and can address several different issues including, but not limited to: the spatial occurrences of urban tourism, cultural tourism in cities, tourism and inhabitants, and renovation projects and their influence on cities. Some of these topics can be best addressed by experts from the spatial planning field or other territory-related fields. In 2019 we receive a grant from the Slovenian Research Agency for a three-year project entitled 'Analysis of territorial and social impacts on the urban tourism and its territorial governance: the cases of Ljubljana, Graz, and Maribor'. Although the primary project idea was to compare the Slovenian situation with the nearby Austrian city of Graz, the Austrian research agency did not support the project. As a result, the research was continued but focused solely on the case studies of Ljubljana and Maribor.

The Slovenian research project, presented in this monograph, consists of four work packages. The first was dedicated to statistical analysis and describing the characteristics of urban tourism in selected cities. In this research, we looked at and analysed the wider situation (statistics, tourism offer, type of visitors) in Ljubljana, Maribor, and an additional eight Central European cities. The later analysis is presented in the report, while the results of the in-depth case study analysis of the situation in Ljubljana and Maribor are presented in the separate 'city profiles'. The first work package also included a survey with tourists in which basic information about the tourists, their interest and knowledge about tourist offers and walked routes in both cities was gathered.

The second work package was dedicated to the spatial analysis of the urban tourism phenomenon. First, we mapped the tourist offers of both cities, second, a detailed analysis was undertaken with regard to the occurrences of tourist attractions in printed guidebooks and on-line blogs. In addition, the routes tourist undertake in the city were mapped. This information was also gathered by the survey that was, mentioned as part of WP1. The third work package was dedicated to the territorial governance of tourism. Here we were mostly interested in how tourism and spatial planning interact, more precisely, to what extent the tourism is integrated and managed via the spatial planning strategic documents and plans and vice versa. This research was done, again, in the context of ten selected cities. On the basis of the results of all three work packages, a sustainable tourism governance model was prepared as part of WP4. The model is represented in a general form, and applied to Ljubljana and Maribor as well as to some other Slovenian towns.

In addition to representing the results of the MESTUR project, the book also focuses on cultural tourism and its impacts on the cities. Cultural tourism was closely inspected in the project SPOT - the Social and innovative Platform On cultural Tourism and its potential towards deepening Europeanisation was financed via the h2020 programme. The project started in January 2020 and will continue until the end of December 2022. The project contributed results of three surveys which were undertaken in the summer of 2020. One survey targeted cultural tourists and their experiences in Ljubljana; the second, inhabitants of Ljubljana; and the third survey questioned tourism suppliers and focused on their role in cultural tourism as well as the struggles they had faced during the Covid-19 pandemic. The research also focused on governance and policy; an overlay with the MESTUR project - both projects fed into each other's results.

Both projects were affected by the Covid-19 pandemic which, in addition to influencing of lives, also significantly damaged the tourism sector. This new reality was inspected in both projects. In MESTUR, we conducted interviews with tourism suppliers in May 2020, while in SPOT we inserted questions about the covid tourism experience of tourists, inhabitants, and suppliers. The results of the covid-related research have been integrated into individual chapters; there is no separate chapter within the monograph on urban tourism and Covid-19.

All in all, the editorial gives an introduction to both projects on which the monograph is based on, depicts the content of individual chapters, and describes the methodological background of the research on which the book is based.

The origins of urban tourism date back to when tourism started. Then, for example, people travelled to Babylon or other urban centres to admire cultural achievements, presented both in built objects and non-materialised culture (theatre, and so on). In the middle ages, urban tourism was not so common, however, the 19<sup>th</sup> century witnessed a tourism rebirth with world exhibitions, the development of transport networks and, later the production of the automobile. Immediately after the Second World War, coastal and mountain tourism rose in popularity; at the same time, cultural tourism attracted visitors to cities. At the end of the 20<sup>th</sup> century, the outlines of contemporary urban tourism were set: business and congress tourism gained importance as did the attraction of cities for a wider population and longer stays instead of just one day visits. The further rapid development of travel at the beginning of the 21<sup>st</sup> century including low-cost airlines has changed the way we travel and have enabled shorter stay vacations as well as shared economy solutions for accommodation and transportation. The digitalisation of the tourism sector has also contributed to the accelerated development of urban tourism. Today, this type of tourism increases at a rate of between 5 and 10 % per annum; top world urban destinations such as London welcomed around 20 million visitors in the period immediately before the pandemic.

In Slovenia, development of urban tourism mostly started in the 1960s and 1970s. Cities became attractive because of new functionalist buildings which were constructed for service purposes, and there was also notable investment in tourism infrastructure. Among the activities that tourists pursued in the cities were cultural tourism, based on cultural heritage and museum, and business. A strong emphasis on cultural heritage was still evident at the beginning of the 21<sup>st</sup> century when Slovenian cities promoted their museums, galleries, folk culture related events. Not much later, Ljubljana established its major office for tourism promotion and management; since then, this office has put the city on the global map of tourist destinations. Where the city once lagged behind its neighbours like Graz, it has now overtaken them in terms of the quantity of visitors who visit and in terms of the variety of tourist offerings that it provides. Due to the pandemic and the high concentration of tourism activities in the city centre, the city now also promotes attractions as well-outside the city, and focuses more on providing authentic experiences for tourists. By authentic, we have in mind tours that cannot be experience in other cities, and that are not available for large numbers. In this way urban tourism has tried shift more towards "new urban tourism" in which tourists are motivated to consume the city in a manner akin to its inhabitants.

Knowing this, it is not difficult to define the type of tourism one finds in the city. While the term urban tourism is used as an umbrella term for all tourism in the city, other types of tourism should be listed, such as cultural, shopping, culinary, and sports tourism; to name but a few. All of these types of tourism depend on the offers available in the city and its attractions. Lately, additional new types of tourism such as dark, medical, art and others have been developed and recognised. It follows, that we can define different types of urban destinations, among which there also exists cities that were built solely for touristic purposes; such as Las Vegas. As important attractors in the city, one also needs to mention cultural quarters where cultural offerings are commonly intensified, and which offer tourists a comprehensive cultural experience. The cultural experience of tourists may interfere with the cultural experience of local residents as they are using the same space and engaged in similar activities. Among all types of tourism, urban tourism is the most interlinked with the local population and services provision for two reasons. First, it is difficult to differentiate between the users of urban public spaces and other services.

## 2 Urban tourism in the 21<sup>st</sup> century

Naja Marot  
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Second, due to a lot of daily visitors who come to the city, e.g. daily commuters, daily business or tourist visitors, it is impossible to approximate the right amount of services needed on the level of the city since the daily visitors are not counted in any statistics nor are they registered as inhabitants.

Of all types of tourism, urban tourism has been most impacted by the Covid-19 crisis. The negative impacts were particularly felt by those cities which rely on foreign visitors and overnight stays, among which is Ljubljana; 95 % of overnight stays recorded within the city are made by foreign tourists. In general, the drop in the number of tourist arrivals to European countries was between 70 to 80 % for the year 2020, while in 2021 the number was lower and more tourism activities occurred. The surveys and interviews that we carried out showed that tourism suppliers were not prepared at all for the crisis. Suppliers also did not want to predict what would happen during the crisis or how long it would last. In the survey, which was carried out later in 2020, they explained about the measures that they had undertaken and how difficult it was for them to overcome the losses to their incomes. The government did offer some support; however, in the first year it completely ignored the struggles of the cultural sector – including cultural tourism.

All in all, the chapter gives an overview on urban tourism as one of the more relevant tourism types of the 21<sup>st</sup> century. It describes its characteristics, types of tourists, and urban destinations, and sheds light on the experiences of cities during the Covid-19 pandemic period.

### 3 Urban destination Ljubljana Nina Stubičar

Urban tourism is one of the most important development impulses of modern cities. Along with other things it affects residents and interferes with urban space. The modern phenomenon of visiting cities, which is generally defined as a multidimensional phenomenon that attracts different types of visitors to tourist destinations, has become the subject of detailed research only in recent decades. Research upon urban tourism was initially focused on world renowned tourist destinations, but in recent years other non-metropole cities have gained importance; we attribute this to changed perceptions of holidaying and different ways of traveling. Among these types of cities is Ljubljana, the capital of Slovenia, which has also become more recognised because of the European and other titles that it has held (such as Green Capital of Europe), and a pro-active tourism campaign which has targeted visitors from new markets such as Asia. The city, small in area and population, but not in its content has, like other cities succumbed to the growing development of technology and digitalisation; enabling the development of many other human-dictated activities in the city. Awareness that urban tourism is a phenomenon of several dimensions has opened questions about history and the development of urban tourism in Ljubljana and its impact on residents and tourists. In the chapter, we present a comprehensive view of Ljubljana as an urban destination, and explore the causes, impacts, and connections with other fields that have been affected by the phenomenon of urban tourism. Findings on why and how Ljubljana has developed in the field of tourism are supported by a review of statistical data, types of visitors, and other aspects of urban tourism. By including the results of different research, we also present in more detail the impact of tourism on the residents in terms of employment.

To understand how Ljubljana became an increasingly visited destination, it is necessary to understand its context. Ljubljana, one of the medium-sized cities in Central Europe in terms of tourism and spatial dimension, has developed under the influence of common European history which has left its mark on urbanism and the cultural sphere. Imprints of antiquity and the middle ages are reflected in the narrow streets, while Baroque, Renaissance and Art Nouveau influences are reflected in the city's strong and recognizable architecture. The strong preservation of cultural heritage and awareness of its value has earned many medium-sized European destinations UNESCO titles. In the last year, Ljubljana has successfully included the works of Jože Plečnik on the UNESCO World Heritage List, and prior to that, Ljubljana won the title of Green Capital of Europe. Those titles are one of the many reasons that Ljubljana has become a recognizable tourist destination. In Slovenia, Ljubljana has built its recognition on its locational, economical, and administratively central location from which both residents and tourists can access other cultural and natural tourist attractions in Slovenia and neighbouring countries. According to SURS's statistical data, the continuous development of the destination is reflected by the upgrading of the city's tourist infrastructure as well as the growing number of tourists.

The surplus of tourist overnight stays in the 1980s was linked to the increase in the capacity of hotels and similar establishments, and during the downfall of the former Yugoslavia and the war in the Western Balkans, we can talk about the tourism crisis that impacted this part of the Europe.

The new millennium and the establishment of the umbrella tourist organization Javni zavod Turizem Ljubljana, were key factors in the restart of tourism in the city; this further upgraded existing tourist infrastructure and established Ljubljana as a transit and business destination. Ljubljana has become a notable 'city break' destination, suitable for short city breaks or as a stop on a wider European trip; its tourist offerings attract different types of visitors regardless of the time of the year. In the study Segmentation – Identification of target Groups in Slovenian Tourism (2016), the Slovenian Tourist Board identified four types of tourists who visit Ljubljana: for the experience of cultural attractions; local life; culture; and gastronomy. According to SURS's research, tourists' impressions of the destination are better than expected, and in addition to developed cultural, business, and gastronomy tourism, they are also attracted to the city's nature, the friendliness of local residents, and the feeling of personal safety that they experience whilst in the city. It is important to emphasize that for the development and existence of tourism in the city, the satisfaction of all those affected by tourism is relevant. Residents, who are part of the city through their activities, mostly recognize the positive effects of tourism; most evident in various work opportunities. On the one hand, the developed seasonality of tourism offers temporary work to the students, whilst on the other, the ever-present services used by residents and tourists, and the development of cultural tourism, enable new job opportunities. The increase in the number of employees, which is most evident in culinary services and other tourism fields such as tourism providers, sightseeing, museums and galleries and the creative sector, has stemmed from the increased number of tourists and visitors who come to the city.

The overall conclusion is that urban tourism is a layered phenomenon of various fields and contents and that it has helped to establish Ljubljana as a recognized tourist destination. Regardless of its size, the city can compete with other more renowned destinations in terms of contents, preservation of identity, and overall ability to adapt to new trends. Its rich set of history, architecture and cultural heritage attracts tourists, develops new tourist products, and mostly meets the economic needs of residents whilst posing new challenges for the formulation of strategies focused upon the expansion and management of tourism. Many changes and upgrades are also strongly visible at the physical level of space. The development of tourism and city infrastructure is striving to be sustainable and green. A comprehensive view of Ljubljana as a city destination not only offers an insight into tourism, but also provides an overview of otherwise strongly intertwined economic, social, and spatial fields, and through so doing recognizes both the potentials and the problems related to the development of urban tourism in Ljubljana.

With around 97,000 inhabitants, Maribor is the economic, cultural, and educational centre of north eastern Slovenia and the second largest city in the country. In the city and its surroundings we can find varied and well-developed sports and recreational offers. However, according to the typology of tourist visits, tourist, it is primarily an urban tourism destination. After the Second World War, the city experienced intensive economic and spatial development, followed by intensive tourism development. The peak of tourist visits was recorded in the late 1970s and 1980s (around 235,000 overnight stays per annum). In this period Maribor was regularly included in the list of the top ten tourist destinations in Slovenia with the highest number of overnight stays.

The war in the other republics of former Yugoslavia, and the collapse of large industrial companies in Maribor, led to a sharp decline in tourist visits in the 1990s (to around 40,000 overnight stays in 1995). With the accession of Slovenia to the European Union in year 2004, the re-establishment of transit flows to South-Eastern Europe, the restructuring of the economy, and the expansion and greater diversity of tourist infrastructure, tourism in the new millennium has once again become an important economic sector in the city. The period between 2010 and 2019 represents the period of fastest growth in tourist visits; they peaked in 2018 with around 466,000 overnight stays, whilst in 2019 there were around 218,000 tourist overnight stays. These figures once more placed Maribor again in the list of Slovenia's most important tourist destinations.

### 4 Urban destination Maribor Uroš Horvat

The data shows that a tourist visit to Maribor lags far behind a visit to nearby major cities. In the triangle between Ljubljana, Zagreb and Graz, it is the smallest urban destination, both in terms of population and number of overnight stays. Both capitals recorded several times more overnight stays in 2019; Zagreb 5.8 times more, Ljubljana 4.9 times more, and Graz only 2.6 times more. However, if we convert the absolute data into relative measurements, we find that, according to some indicators, Maribor does not lag behind these cities. For example, intensity of tourist visits, which is expressed by the ratio between the number of overnight stays and inhabitants in a tourist place. When this measure is calculated for 2019, Ljubljana stands out with 7.7 overnight stays per inhabitant, while the values in Graz and Maribor are similar (4.3 and 4.0), and in Zagreb the figure is only 1.8.

The average length tourist stays are also similar. In 2019 and 2021, Maribor had the longest length stays (2.1 overnight stays per tourist in 2019 and 2.4 in 2021), while the values in the other cities were between 1.8 and 2.2 days. Maribor also does not lag behind with regards to its percentage of overnight stays by foreign tourists. In 2019 recorded figures for Zagreb, Maribor and Ljubljana ranged between 83-96 as a percentage of the total number of overnight stays while Graz stood out with the lowest percentage share (52%). Compared to Ljubljana, Maribor has a significantly smaller gravitational area from which tourists visit. The city is more appealing to tourists from Central and Eastern European countries, such as Germany, Croatia, Poland, the Czech Republic, Hungary, Romania and Ukraine; their overnight stays in Maribor are, in percentage terms, at least twice as high as those recorded in Ljubljana. The number of tourists from non-European countries in Maribor is also much lower, since 2019 tourist numbers from such countries have only recovered by about 9% whereas the corresponding figure for Ljubljana is in the region of 25%. The Covid-19 pandemic has had a strong impact on tourist visits and numbers to Maribor. In 2020, the city was visited by only one third of the number of visitors who visited in 2019. The recorded numbers for 2020 were, therefore, at a level lower than those recorded in 1970.

The basic tourist potential of Maribor is represented by the city centre with its historical and cultural heritage, cultural offers, numerous festivals and sports events, and the Drava River. The city has a favourable transport location with good motorway connections with neighbouring countries, and at the same time its transit location at the crossroads of two important European corridors has allowed the development of transit tourism. Aggravating factors are the relatively poor international railway connections that the city enjoys and the lack of scheduled airlines to domestic airport; these factors mean that the city's great potential for connectivity is not fully tapped.

Maribor has a relatively rich historical and cultural heritage. Unfortunately, this is not realised in terms of international tourist potential. However, it is worth highlighting the area of Lent with the oldest vine in the world, should become one of the most important elements of the city's tourist promotion and part of the recognizable identity of the city. A further important aspect of tourist potential in the city is its internationally renowned cultural institutions and events, including mass cultural events. From such events, cultural and event tourism could be further developed. From this point of view, the fact that Maribor was named the European Capital of Culture in 2012 is extremely important.

For sport and recreational tourism the leading position in the country is held by the Pohorje Mountain area which boasts the country's largest ski area. This is sited upon the city's outskirts. The city has a modern football stadium and other sports facilities which host many internationally renowned sporting events; cumulatively, these contribute significantly to international recognition of the city. The city also has a spring of thermal water, but its use for recreational and medical purposes is very limited. In the future, there is a need to intensify this offer and, through so doing, develop modern spa tourism. It will also be necessary to better regulate the area along the Drava River and intensify its use for recreational purposes. Last but not least, the surroundings of Maribor are known for their excellent wine-growing locations and top-quality wines, wine cellars and associated offerings are, therefore, a further important element of the city's tourist offerings. It follows, that an attractive and integrated tourist gastronomic and oenological offer, adapted to modern trends in culinary demand, should be developed in the future.

With regards to tourism infrastructure, the city has modern and diverse accommodation facilities that offer good conditions for business tourism and the hosting of both meetings and congresses. With targeted marketing and the specialization of individual tourism

providers, as well as goal-oriented capacity expansion, Maribor could develop into one of the most important event and congress destinations in Slovenia. Unfortunately, the situation related to the Covid-19 pandemic has severely weakened the financial situation of tourism development leaders (especially the leading company) and has further contributed to the closure of some accommodation facilities.

When designing further tourism development and strategies, it is necessary to take into account the positive attitude of the people of Maribor who are in favour of tourism development and believe that it has a positive impact on local identity, culture and heritage, and nature protection and conservation. The expert workshop on strategic tourism management and spatial planning, conducted within this project, showed that spatial planning supports or follows the development of tourism, while also providing appropriate measures with regard to issues of spatial restriction and/or the monitoring of tourism.

In the end, we conclude that the tourist potential and capacities of Maribor and its surroundings have not yet been sufficiently exploited either in terms of tourist flow or tourist offerings. The results of the survey confirmed that the majority interest of tourists is to see the main tourist attractions and locations in the city centre along with the single area outside of the city at the foot of Pohorje Mountain. Interest in alternative tourist locations was very low. In the future, it would be necessary to improve the management and planning of accommodation capacities, and to also ensure that they are better used including during the off-season period. Given Maribor's comprehensive offers, this should not be a major problem but rather, a challenge for the future.

As various items of research report, the latest pre-pandemic increase of urban tourism resulted in multiple impacts in the fields of economy, society, environment and territory, and governance. Before this latest development, researchers had already been curious as to how to best measure the impacts of tourism and how to address them before they caused more significant damage. The methods used to measure the impacts can be roughly divided into three groups: qualitative approaches, quantitative approaches, and mixed methods. The first group of assessment approaches mostly rely on participative investigation techniques such as interviews and focus groups, while the second group uses numeric data - indicators that are available to measure tourism and related characteristics. The quantitative methods then take the data and process it via modelling, multi-variate statistics and so on, in order to calculate the best approximations of the impacts. In the mixed methods approach quantitative data and the opinion of participants in the assessment was relied upon. Participants can include anybody; from experts to the general population; a broad mix being especially important if a comprehensive assessment is sought. The overview of existing approaches to the assessment of urban tourism impacts has revealed that all three groups of assessments are equally used and that, lately, GIS data has become an important input for assessment.

In Chapter 5 of the monograph we present out attempts at applying the Territorial Impact Assessment approach to the field of urban tourism. The Territorial Impact Assessment method is a method that was introduced by the European Union at the beginning of the 21<sup>st</sup> century as an assessment approach that would support the regulation and policy making of the European Commission to become more territorially sensitive and aware. It was first introduced in the European Spatial Development Perspectives in 1999, and then later methodologically developed by ESPON (the European Spatial Planning Observatory Network). Nowadays, the approach is regularly used by the Commission and occasionally by member states; depending on their individual regulatory cultures. Although initial attempts were focused on quantitative assessments, today, qualitative approaches are more favoured by policy makers and researchers alike.

The approach used in our case relied on a participatory approach, and started with a workshop in which we brainstormed about the potential impacts of urban tourism growth. Ahead of both workshops, one organised in Ljubljana and one in Maribor, we prepared logical chains of tourism and planning strategies to represent the policy framework supporting tourism growth in both cities. At the workshops participants from tourism, planning, and research listed various impacts. These were grouped into four categories: society, economy, environment and spatial planning, and (territorial) governance. While the economic impacts were considered to be the most direct and obvious

**5 Territorial impact assessment as approach to evaluate impacts of urban tourism**  
Naja Marot  
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ones, the first step of the assessment also revealed a wider list of social and spatial impacts, of which, especially for Ljubljana, participants were more critical. In the field of spatial development, tourism has mostly caused negative impacts including, for instance, congestion, the use of public space for tourism purposes, and increased pollution. In the governance category there was a lot of discussion about tourist taxes, how they are spent, and existing and necessary strategies.

On the basis of the qualitative assessment of the impacts we then prepared a numeric assessment. Provided that data was available, indicators were assigned to the listed impacts. Altogether, we gathered data for 78 indicators in the field of economy, society, environment and spatial planning, and governance. The indicators enabled us to calculate the trends and changes in the value of overnight stays, arrivals etc., for the period 2019/2021 for which we then, specifically, assessed impacts using a 5-score scale: -2 very negative impact to +2 very positive impact. This assessment was first done individually, the impact for which we were disagreeing about the scores, a group discussion was organised to level the contradictory scores out. Besides the numeric assessment of the impacts, participating experts also needed to decide if the individual impact was caused mostly by urban tourism or whether some other factors were also influential. This was the last phase of the assessment; the evaluation.

The results of the assessment showed that we need to look at urban tourism comprehensively. While we can depict, with regards to the economic sector, mostly positive impacts, in the sectors pertaining to society, environment and spatial planning this was not necessarily the case. Moreover, in the social sphere, it was noted that whilst participants put emphasis on e globalisation, internationalisation, and the increased quality and greater vibrancy of life in Ljubljana, they also complained about the loss of Slovene language in, amongst others, gastronomy sector. The assessment also addressed some of the "myths" of urban tourism, namely, that it causes more crime and demographic changes in city centres, e.g. people moving out. We were not able to confirm either of these presumptions because the data supported contrary conclusions. To conclude, we report that the exercise of performing a Territorial Impact Assessment was useful and contributed to the garnering of a broader picture of the impacts of urban tourism. In the event that such an exercise was performed again in the future, some improvements should be considered with regard to the provision of, and access to, the data necessary to carry out such assessments.

## 6 Spatial aspects of the development and promotion of urban tourism

David Klepej  
Nina Stubičar  
Naja Marot

Urban tourism has been amongst the fastest growing types of tourism in recent times; thus, it is shaping cities more and more intensively. It represents a multidimensional phenomenon within which human, economic, and spatial factors intertwine. These characteristics and a plethora of impacts lately caused by urban tourism have attracted researchers from within several fields, including planning, to put urban tourism on their research agenda. Among recorded impacts, one can report an increase in house prices, a change in the provision of services in the most touristified areas, e.g. urban centres which have, for instance, experienced increasing flows of pedestrians within their core areas as well as traffic jams, and the development of tourist infrastructure which takes precedence over development that would otherwise be more for local residents. What these influences have in common, is that they have an important spatial dimension and materialize as a physical element in urban space. Researchers are increasingly addressing not only the development and impacts of urban tourism, but also the behaviour of tourists in cities. Among issues addressed have been motives and reasoning for their decisions to visit a given destination, what points of interest they visit, and how/where they move around within the given destination.

Spatial analyses of urban tourism are often based on the analysis of the presence of tourism infrastructure (accommodation, services etc.) and attractions; enabling comparison with services for local populations. Spatial analyses use official statistics, data about tourist reservations via web portals, GPS trackers, geolocated photos or social media posts, and various questionnaire surveys. Results of previous studies show that the behaviour of tourists is strongly influenced by the length of their visits, the morphology of the city, and the location of accommodation, selected by tourists, as well as attractions and (tourist) services. Based on this, we decided to check the current spatial dimension of the urban tourism infrastructure and offers in Ljubljana and Maribor, and see where and how touri-

sm in these cities is developing. Furthermore, we were interested in how the promotion of the destination through different channels (printed guidebooks, blogs, official tourism websites and so on) directs tourists around the city and how this then reflects in their actual patterns of behaviour and the paths that the tourists take in the destination.

To depict characteristics of spatial dimension of urban tourism more in general, we started with comparative spatial analysis of urban tourism in selected Central European cities. The overview of basic tourist and demographic statistics for ten selected cities was upgraded with a cartographic analysis of their morphology and a location depiction of tourist infrastructure in the historic city centres. Through so doing we attempted to assess the delimitation of the tourist business district in each of the cities, i.e. the part of the city where tourism is one of the key economic activities. In this way, we determined the extent to which cities in Central Europe are similar with regard to their spatial aspects of tourism, and we then further assessed the extent to which this European context is transferable (and has been transferred) to Ljubljana and Maribor. In order to analyse the behaviour of tourists in the destination, we also analysed the type and spatial characteristics of the top 10 attractions advertised by cities via their official tourist portals.

We upgraded the Central European context with a more detailed spatial analysis of tourism in Ljubljana and Maribor in two phases. The first phase was based on an analysis of occurrences of tourist attractions in promotional channels; this was undertaken from a set of descriptive data and the total occurrences of identified tourist attractions in printed and online guides. The data set was initially categorized according to types of attractions into three basic groups; cultural institutions, open spaces, and historical buildings. We then mapped the three categories of sites separately and determined the level of occurrence of individual sites within each cartographic display. Based on this analysis, we gained insights into the spatial dimension of tourist offers in Ljubljana and Maribor and found out how cities market and develop their offer. At the same time, we were able to compare the promotional channels used and determine the representations of the offers or attractions in the promotions as well as the impact of one or other type of promotion. The second level of insight into urban tourism in Ljubljana and Maribor was based on a survey conducted in both cities in July and August 2021. The survey questionnaire was intended to determine the number of visitors as well as recognizability of key and alternative tourist attractions promoted by Ljubljana Tourism and Maribor Tourism on their websites. Altogether, around 600 tourists participated in the survey. One of the questions was dedicated to identifying the routes which tourists take within the destination. The completed routes, which the tourists drew in the survey, were digitized and further processed using GIS. Through mapping routes, we tried to find out how tourists move around the city and to establish whether we could detect and identify the most visited points in the city. In the survey, we were also interested in how tourists obtain information about the visited destination and its offerings, and how this information affects either the visibility of the sites or the routes which they take around the city.

Altogether, we conclude that both the promotional materials and the tourists contribute to the centralization of the tourist offerings, as well as activities and tourist flow. In both cities, most of tourist offerings are in the city centres; this is also where tourists "are sent" by the promotional channels. In order to change this pattern, the cities need to provide alternative tourist products or better promote existent tourist offers or, as is the case of Maribor, work on the tourist potentials of the city's surroundings.

City managers, the state, and other national as well as local actors and interest groups are often aware of the importance of tourism and the development potential that it represents in Slovenian urban areas. The same actors often try to transform these potentials in ways that are in line with economic needs, while disregarding wider social needs. In this regard, they seek to valorise and transform areas containing various forms of 'tourism capital' (e.g. physical and cultural heritage, distinct natural features) into a form of scientific and cultural curiosity that is intended to attract visitors, consumers, and investors. When initiating the processes of valorisation of relevant tourist capital, cities not only start to protect the locations with such goods, but also try to adapt and change them in ways congruent with the standards applicable in global tourism. For example, many European cities boast historical or cultural quarters, streets, and areas of medieval, Baroque, and Art Nouveau architecture which are legally protected as important parts of their cultu-

## 7 Limits of urban tourism in Ljubljana: the views of different social groups

Matjaž Uršič

ral heritage. Yet, during the process of protection of historical architecture, urban form, and design, the original use and aesthetic-symbolic characteristics of these spaces are, on occasions, replaced by more socially sterile environments that exclude unforeseen, locally specific social practices, rituals, and events. The way in which the process of tourism development of cities is carried out can thus significantly affect the organization and functioning of local spaces. While urban neighbourhoods, historic buildings, and streets retain part of their original "material" value with respect to their ambient, aesthetic, and architectural features, they may also lose part of their "intangible (intangible)" value; that which is represented by the strong symbolic-identity that they possess for, amongst others, local populations, daily users, and their social networks.

The chapter deals with the processes of tourist transformation of urban areas and the role that tourism should play in the further development of cities, regions, and the country. More precisely, we analyse the impact of the development of tourism activities from the perspective of tourist visitors and the inhabitants of the city of Ljubljana. It should be noted that the processes of changing urban areas for and due to tourist activities also indicates, in certain cases, negative processes of 'impoverishment' and a form of tourism-based homogenization of activities in specific areas. In extreme cases, such processes lead to urban "gentrification" processes (Smith, 1996; Hammett, 1984; Downs, 1981), where major population movements and city-building activities occur due to increased living costs, rents, reduced public service functions and so on. In our analysis, we focused in particular on the detailed definition of impacts caused by tourism development as seen from the point of view of different users of urban areas. We preferred to limit ourselves to the 'quality' of the effects of tourism development rather than 'quantity' and chose therefore to analyse how tourism has changed the socio-cultural basis of urban activities and what this means for the long-term development of the city of Ljubljana.

One of the key dilemmas of urban tourist development is related to establishing appropriate relationships between the processes of commodification, the development of services, the protection of historical heritage, and the preservation of the heterogeneous socio-cultural orientation of urban areas. Accordingly, the text discusses how it is necessary to reconcile the interests of different groups in such way that the city, local community, cultural-artistic creative groups and other production in the city can develop and co-exist in a more sustainable form of. The current situation of a postmodern globalized environment in which cities are literally competing for resources, adequate labour force and capital makes this task even more difficult.

The findings from our analysis of the researched data shows that material cultural heritage is of exceptional importance for urban tourism in Ljubljana. It also shows that tourists are much less sympathetic to intangible values that are also part of urban areas. In this context, intangible values are those form of events that significantly enrich the quality of life of residents, but do not enter the discourse of urban tourism as important actors in tourism development. It is important to mention that tourists particularly indicated the existence of an extremely homogeneous structure of urban tourism offers in Ljubljana and suggested that this is based on the exploitation of the ambient, aesthetic, and physical potentials of the city centre without noticeable surplus value in terms of tourism diversification of services and tourism content. Analysis of the data shows that Ljubljana's "cuteness", "charm" or "loveliness" in relation to the material characteristics of space (i.e. monuments, protected heritage, low heterogeneity of spaces, low population density, green system (nature, and so on) stands out as a key feature of the city's urban tourism. Our analysis of the poorly developed differential advantages that Ljubljana's urban tourism possesses in relation to other cities further points to a 'blind spot' within Slovenian urban tourism which either refuses or is unable to identify the limited reach of current tourism development strategies. The data show that the current mechanisms of tourism development focus mainly on preserving material values, i.e. what we see in front of us. In this text, we tried to build on the observed shortcomings of the development of urban tourism and give some starting points on possible approaches to the further tourism development of cities in Slovenia. The intent was to integrate economic, social, and cultural aspects so as to find guidelines for an optimal solution, which would also provide incentives for improving the quality of life of the population in the city and the wider region.

One of the key reasons for cities to provide incentives for tourism development are increased financial inflows. However, the fact that tourism does not only have positive impacts also has to be acknowledged. Numerous studies have focused on the negative consequences of tourism development which can be seen in economic, societal, environmental, and public spaces: from the increased costs of building and maintaining infrastructure as well as public services (a tourist destination has to employ more policemen, firemen, medical professionals, and other such persons, than a non-tourist destination); decreased economic benefits at the destination level (in cases where the tourist infrastructure belongs to foreign investors and the money made in the destination flows out it instead of being reinvested in situ); increased public expenditure to help tourist workers survive out of season; increased costs associated with the upkeep of cultural and historic monuments, museums, galleries, libraries, and so on; increased public expenditure for education, medical cases, housing and similar for the local population which tends to grow alongside with tourist growth in the (given) destination; and changed use of land due to the expansion of accommodation and hospitality facilities.

All of these negative consequences (separately and cumulatively) are tangible proof of a problematic relationship between tourism management and spatial planning. And yet it is precisely because of them that tourism management and spatial planning should work hand in hand, especially during time periods of either growth or crisis (such as that witnessed during the Covid-19 pandemic). Unfortunately, our analysis of the spatial planning documentation of selected Central European cities shows that only 3 out of 10 cities actually include tourism development and its (positive and negative) consequences in their strategic deliberations; and only 4 briefly mention tourism as one of possible future developmental path.

The lack of comprehensive integral managerial solutions is also evident in tourism strategies both abroad and in Slovenia; at all decision-making levels.

Yes, the Slovenian tourism development strategy for the period 2012-2016 does mention sustainability, yet at the same time it negates its own comments because it primarily focuses on the growth paradigm with the main goal being to further increase the share of the tourism sector in GDP: income from accommodation and related services, the number of tourists, the number of nights spent in Slovenian destinations and so on. According to this strategy, tourism should contribute to the three main goals of sustainable development and at the same time also positively influence regional development (which, in turn, should be better balanced) as well as the quality of life of the local population. It is not clear, however, how these goals are supposed to be achieved. Whilst there are numerous measures defined for natural habitats in which tourism has to be sustainable, these measures do not exist for cities. The national tourism strategy does not even identify city tourism as important; city tourism is, in effect, hidden under the label of cultural tourism which envelops tourist attractions such as cultural heritage and festivals.

In comparison, the newer Slovenian tourism development strategy for the period 2017-2021 (labelled 'Strategy for the Sustainable Tourism Growth of Slovenian tourism for 2017-2021') emphasises Ljubljana and its surroundings as one of the Slovenia's major tourism destinations and suggests better and more efficient utilization of cultural heritage for tourism purposes.

And spatial planning? Both at municipal and national level the only items which indirectly pertain to tourism in relevant strategic documents are guidelines for cultural heritage and historic city cores' preservation. Even the key document - 'Spatial Development Strategy of the Republic of Slovenia' from 2004 - does not include any more. The same also goes for the draft of the new spatial development strategy which was available in the winter 2022.

Having established that tourism development strategies tend not to include cities and spatial planning documents tend not to include tourism, there is only one logical conclusion for us to make: a new approach to urban spatial planning and development is badly needed. A solution which could bridge the gap between tourism and spatial planning is integrative spatial planning. Our idea seems to be more than confirmed by numerous (more or less spurious bottom-up rather than top-down) examples of good practice which force us to explore the avenue of knowledge and experience exchange. Several of these examples of good practice are presented in the framework of our chapter and provide a solid base for sustainable tourism management, including the management of

## 8 Territorial governance of urban tourism

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spatial flows of tourists when they are at a destination. They represent the basis for development of our integrative tourism management model which enables decision-makers in cities to access current levels of stakeholder activation across different relevant management segments and formulate measures for the further activation of stakeholders and/or segments which seem dormant.

The proposed integrative tourism management model could be used to assess the quality of urban tourism management in both self-evaluation and external evaluation contexts. We foresee three steps:

- Identification of all relevant stakeholders and policies at any chosen destination and placing them into a relevant segment within the model.
- An assessment of how the stakeholders and policies within any given segment function separately.
- An assessment of how stakeholders and policies within any given segment interact when managing tourism at the destination level.

Key in all three of the steps is just good-quality secondary data and information resources (policy documents, reports, etc.) but also a good working knowledge of the destination (e.g. personal experiences, qualitative data from in-depth interviews, and so on).

Our model provides stakeholders with a framework to develop policy goals using a clear methodology which can measure any relevant category. It shows that tourism planning only makes sense in the framework of the spatial planning (and *vice versa*). Only this systemic interdisciplinary approach can deliver sustainable tourism results at all relevant levels, and guarantee a high quality of life for local populations.

The last chapter of the book is dedicated to a reflection upon the content of monograph and conclusions. It is structured in seven subchapters according to the main topics and statements. The first such statement is that urban tourism is undisputedly a special and rapidly changing type of tourism. This has been proven by the facts presented in several chapters, but mostly by the rapid growth that has occurred within both major and secondary urban destinations in Europe. In addition to that, the motives of tourists, as well as the style and type of travel to the cities is constantly changing. This all needs to be taken into account when promoting and managing urban destinations.

Second, urban tourism has established itself as a significant type of tourism. Both the growth of arrivals and overnight stays has been rapid, as has been the percentage Ljubljana and urban destinations hold among the other tourist destinations. In 2019, Ljubljana accounted for 18% of tourist arrivals, with all urban municipalities combined accounting for 27%. This percentage almost equals the number of mountain municipalities which have so far held the first position in regards to the arrivals. Regarding overnight stays, the percentage is lower and accounts for only 21% of all overnight stays registered in Slovenia. In addition, and compared to some other Central European destinations, in Slovenia, foreign tourists predominantly account for overnight stays. This is due to the fact that the country is too small for Slovenians to travel specifically to the cities for an overnight stay, instead they go for a day visit.

The third fact that we would like to share is that urban destinations develop at different speeds and they do so in a manner that is not related to their size (of population or area). Mostly, the development is a result of their promotion efforts and campaigns, including social media trends and travel books. Furthermore, the cities can be divided into cities which attract mostly domestic tourists, and those which attract solely foreign tourists. The later strategy has, during the period of the pandemic, not been so successful and, as a result, the nature of their promotions and campaigns have been adopted; this has resulted in bringing the cities, their tourists, and their local populations closer together.

Fourth, the impacts of urban tourism are multifaceted. They extend to fields including: the economy, the environment and territory, and management. While the most obvious impacts are in the field of economy, one needs to also take into account society and territory. Social impacts include globalisation, internationalisation, and improvements of urban life livelihoods. However, there are also negative impacts such as house prices, conflicts between tourists and the locals and so on. For spatial planning, planning and

developing tourist infrastructure can cause clashes between public needs for infrastructure, and solely tourism focused infrastructure such as hotels. The pandemic has shown that the impacts can be also mitigated; some of them disappeared whilst others were tackled simply by tourism activity disappearing from the area.

Fifth, cultural tourism is an important element of city life. It is not only important because of benefits that it can bring to locals and tourists, but also because of cultural exchange which happens on many levels. One such example are tourist visits from different continents which allow for cultural exchange between locals and tourists, another one would be the arrivals of performer to the city. Residents have also mentioned economic benefits and a strong will for interaction with tourists. Although, in the case of Ljubljana, cultural offer was not so accessible to the locals (no discounts were offered to them), this has change with the pandemics.

Sixth, and as has already been argued multiple times in the monograph, cities were not prepared to face the pandemic. Their strategies did not include, with the exception of terrorist attacks, measures for managing unforeseen crises, and the central state has also not provided much help in this regard. After focusing on medical aspects of the crisis, the state provided the so-called vouchers which were first specifically focused on the providers of accommodation. Only in 2021 were these also allowed to be used for cultural offerings as well. Apart from that, the state offered financial support for employment in the sector, but measure was also subject to some restrictions and did not, therefore, benefit everybody in the sector equally. Although the crisis has offered a good opportunity to integrate such measurements in new strategies, little change has been noted to date. Seventh, with regard to urban tourism we mostly talk about spatial concentration. Most of the infrastructure, as well as the attractions and their promotion are focused on very small parts of cities. This channels and densifies where tourists stay and move around in the cities, and also results in the heavy touristification of certain urban parts. This phenomenon has progressed to an alarming phase in some of the cities, and has forced them to address such issues by changing their planning and tourism management strategies and approaches. Chapter 8 offers different options by which such work can be furthered, and also describes a model for a more sustainable and integrated management of tourism which takes into account both tourism and spatial planning aspects.

To conclude, the monograph, has, for the first time in Slovenia, addressed the research topic of urban tourism, and as such represents an important source for students, researchers, professionals, and policymakers as well. It provides basic information about urban tourism as one type of tourism, and focuses not only on two major Slovene destinations but also the spatial, social and governance aspects of tourism management. Therefore, the monograph also serves as important reflection of the situation in Slovenia, and calls for better integration between the sectors of tourism and spatial planning.

## 9 Towards new urban tourism

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# Glossary

<b>Adventure tourism</b>	A form of tourism in natural areas that involves an element of risk, a higher level of physical exertion and the need for specialised skills (GDRC, 2020).	<b>Green tourism</b>	A type of tourism that promotes and supports sustainable ways of traveling with respect to the protection of space and the environment (Authors' own definition).
<b>Backpacker tourism</b>	A global social phenomenon with significant economic impacts, an integral part of contemporary mass tourism (Gams, 2016).	<b>Mass tourism</b>	Traditional, large-scale tourism commonly used but loosely referring to popular forms of leisure tourism that became established in Southern Europe, the Caribbean and North America in the 1960s and 1970s (GDRC, 2020).
<b>Business tourism</b>	A type of tourism that includes business events and business meetings organised by the client for its employees or business partners; this can include symposiums, congresses, trade fairs, cultural and artistic events, and so on (Mikolič et al., 2021).	<b>Motivation/motifs of tourists/visitors</b>	A need, a state of being that directs an individual to take a particular action to bring him satisfaction (Authors' own definition).
<b>City branding</b>	The overall image of the city. The perception of a city influences its attractiveness to tourists, foreign investors, and potential students amongst others (Herget, Petrù and Abrhám, 2015).	<b>Overtourism</b>	Overtourism is the impact of tourism on a destination or parts of a destination. Such tourism has an excessively negative impact on residents' perceptions of the quality of life and/or the quality of the visitor experience (Koens, Postma and Papp, 2018).
<b>City tourism, urban tourism</b>	A type of tourism activity which takes place in urban spaces with its inherent attributes characterized by non-agricultural based economy such as administration, manufacturing, trade and services and and by being nodal points of transport. Urban destinations offer a wide and heterogeneous range of cultural, architectural, technological, social and natural experiences and products for leisure and business (UNWTO, 2020).	<b>Revitalisation</b>	Urban revitalisation: revitalising, transforming economically and socially deprived urban areas into attractive urban districts by improving the conditions for carrying out and introducing new activities, the social structure, and modernising the city environment (Urban terminology glossary, 2020).
<b>Cultural quarter</b>	A district within a city primarily defined by culture (customs, beliefs, art, lifestyles and the organisation of social groups) and artistic activities such as: film, literature, music and art (Oxford English Dictionary, 2020).	<b>Tourism destination</b>	A physical location where a tourist spends at least one night. It includes the tourist products and attractions available to the tourist taking into account the return trip within one day. The area has physical and administrative boundaries, defined management and marketing strategy (destination branding) (Authors' own definition).
<b>Cultural tourism</b>	Travelling to experience and learn about cultures or aspects of cultures (Bujdoso et al., 2015).	<b>Tourism experience</b>	A set of activities in which individuals engage on their own personal terms, such as pleasant and memorable places, allowing each tourist to build his or her own travel experiences so that they satisfy a wide range of personal needs, varying from pleasure to a search for meaning (IGI Global, 2020).
<b>Day visitor</b>	A visitor arriving to the destination and departing from it on the same day, regardless of the motivation for his/her trip (GDRC, 2020).	<b>Tourism infrastructure</b>	Roads, railways, harbours, airports, water, electricity and other energy and utility services that serve not only the local population but also the tourism sector (adequate accommodation, restaurants, and passenger terminals) (GDRC, 2020).
<b>Dark tourism</b>	A type of tourism which involves visiting the sites/destinations/places of various types of disasters and tragedies (Authors' own definition).	<b>Tourism supply</b>	The tourism supply of a destination is formed by natural and cultural heritage as well as the touristic infrastructure of a destination (IGI Global, 2020).
<b>Ecotourism</b>	A type of tourism based on the concept of limited (not mass) travel to natural, sensitive, authentic, remote, and protected areas. This tourism responsibly protects nature and promotes the well-being of the local population and in this way fosters respect for different cultures and human rights (Mikolič et al., 2021).	<b>Tourist area/ tourist region</b>	A settlement area with a developed primary and secondary tourist offer. The two interact geographically and economically and form homogeneous units (Mikolič et al., 2019).
<b>Gentrification</b>	A process of moving of middle- and upper-class residents to redeveloped areas, usually in or near urban centres, and out-migration of the socially deprived population due to the rising costs of living (Urban terminology glossary, 2020).		



<b>Tourist attraction</b>	Tourist attractions are defined as destinations for visitors that are accessible at a specific time. Visitors include local residents, daily visitors on excursions, and people travelling for business or leisure. Formal definitions exclude shops, sports stadiums, theatres, and cinemas, although tourists may consider and use the excluded services as tourist attractions (GDRC, 2020).
<b>Tourist business district</b>	An area of the city mainly dedicated to the business tourism sector (Oxford English Dictionary, 2020).
<b>Tourist cooperatives</b>	A business model for the organisation of alternative forms of tourism, focusing on the provision of accommodation and business networking (SOS, 2017).
<b>Tourist demand</b>	The number of people who travel or wish to travel and use facilities and services in a location unrelated to their work and residence (Matthieson and Wall, 1982); the relationship between an individual's motivation and their ability to travel (Authors' own definition).
<b>Tourist destination management</b>	Management of all elements that contribute to the functioning of a destination, including the management of attractions and amenities, accessibility, marketing, and price setting (Authors' own definition).
<b>Tourist facility</b>	A building created for tourism needs and purposes (GDRC, 2020).
<b>Tourist flow</b>	Movement of tourists first from home areas to destinations, and then within a destination (GDRC, 2020).
<b>Tourist product</b>	Different things for different tourism sectors. For hotels it is 'guest night', for airports it is 'airline seats' and passenger miles, for museums, galleries, archaeological sites and so on, the product is measured by the number of visitors. For a tourist, the product is the whole experience resulting from a purchase from a tourist facility, from the moment they leave home until they return (GDRC, 2020).
<b>Tourist/visitor/temporary resident</b>	A person travelling for leisure, relaxation, business or other purpose, but not for paid employment (the tourist does not receive payment or a reward for his or her travel). The person stays for at least one night (not more than 365 consecutive nights) in an establishment or other accommodation in a place outside his or her usual environment (Statistical Office of the Republic of Slovenia, 2019).
<b>Touristification</b>	The impact of tourism on the environment, socio-cultural changes in a given place, and changes in the habits and customs of local people (Zgrinskić, 2019).
<b>Urban centre</b>	Densely built-up central and usually oldest part of a city with a high concentration of administrative, commercial, retail and tertiary activities (Urban terminology glossary, 2020).

### Visiting friends and relatives

A type of tourism that involves visiting relatives and friends, or having them provide accommodation for the visitor, while the visitors uses the trip for other purposes (Marot et al., 2020).

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# Table of indicators

IMPACT GROUP	IMPACT DESCRIPTION	INDICATOR SUGGESTION	Ljubljana			Maribor			Source
			2014	2019	2019/2014	2014	2019	2019/2014	
SOCIAL IMPACTS DIVERSITY OF SOCIETY	Increase in the number of tourists	Number of tourists (arrivals)	621,994	1,127,904	181	132,942	217,817	164	SURS SI-STAT, statistical data
	Increase in the number of foreign tourists	Number of foreign tourists (arrivals)	587,653	1,068,887	182	113,266	188,754	167	SURS SI-STAT, survey
	Increase in the share of foreign tourists	Share of foreign tourists (arrivals)	94.5%	94.8%	100	85.2%	86.7%	102	SURS SI-STAT, survey
	Increase in the number of foreign tourists from other continents	Number of foreign tourists from other continents (arrivals)	140,721	291,059	207	8,829	17,025	193	SURS SI-STAT, statistical data
	Increase in the share of foreign tourists	Share of foreign tourists from other continents (arrivals)	25.0%	25.8%	103	7.3%	7.8%	107	SURS SI-STAT, statistical data
	Change in the origin of foreign tourists	Top 6 countries of tourist arrivals (share of arrivals) (yes = number of countries whose ranking has changed is at least 2)	Italy (11,5), Germany (7,5), USA (5,0), GB (4,7), France (4,3), Austria (4,2)	Italy (10,9), Germany (8,6), USA (5,4), VB (4,9), Austria (4,1), France (4,0)	No	Germany (11,9), Austria (8,6), Italy (8,3), Poland (7,2), Croatia (5,3), Serbia (4,1)	Germany (11,5), Poland (8,2), Austria (7,1), Italy (5,4), Croatia (5,3), Serbia (4,1)	No	SURS SI-STAT, survey
STRUCTURE OF TOURISTS	Change in the structure of tourist types	Share of group tourists by organisation of the trip (trips organised by an agency or other organiser)	25%	20%	82	9%	20%	213	SURS SI-STAT, survey
OPENNESS, CULTURAL EXCHANGE	Increase in foreign exchange students	Number of Erasmus students per year	1,228	1,445	118	432	451	104	Cmepius, on demand
	Increase in foreign exchange students	Total number of all exchanges	1,613	2,158	134	-	-	-	Cmepius, on demand
	Increase in native exchange students	Number of countries of origin of students on exchange	31	35	113	14	29	207	Cmepius, on demand
	Change in the structure of countries of origin of students	First five countries of origin of students (change at least two countries from the list)	Spain, Czech Republic, Germany, Poland, Turkey	Spain, Germany, Czech Republic, France, Portugal	Yes	Spain, Czech Republic, Poland, Turkey, Portugal	Spain, Germany, Czech Republic, France, Portugal	Yes	Cmepius, on demand
CREATIVE INDUSTRIES	Increasing the number of modern/digital nomads	Number of coworking spaces (number of foreigners living and working in the city)	1	9	900	1	4	400	Nekotracija, online media
SAFETY	An increase in theft	Number of thefts	42,292	25,038	59	11,360	7,086	62	Slovenian Police, on demand
	High level of safety compared to other destinations	Improvement of Slovenia's ranking in the Global Peace Index indicator	14 <sup>th</sup> place	8 <sup>th</sup> place	Yes	14 <sup>th</sup> place	8 <sup>th</sup> Place	Yes	Global Peace Index
TOLERANCE	Increase in intolerance in society	Total number of incidents of disturbing the public peace (June, July, August, December)	826	627	76	-	-	-	Slovenian Police, on demand
	Increase in intolerance in society	Total number of incidents of disturbing the public peace in public areas (June, July, August, December)	603	506	84	-	-	-	Slovenian Police, on demand
SATISFACTION	Increase in satisfaction with life in the city	Share of residents who consider that tourism contributes positively to the quality of life	66%	49%	74	-	-	-	Ljubljana Tourism, survey
	Improvement of services in the city	Share of residents who think that tourism improves the level of services (shopping, restaurants, entertainment) in the city	43%	72%	167	-	-	-	Ljubljana Tourism, survey
OPENNESS	Positive attitudes of the residents towards tourism	Share of residents who think that tourism contributes to the development of the city	91%	90%	99	-	-	-	Ljubljana Tourism, survey
GENTRIFICATION	Decrease in the number of residents in the city centre	Number of residents in the city centre	25,729	25,861	101	8,063	8,402	104.2	SURS SI-STAT, statistical data

IMPACT GROUP	IMPACT DESCRIPTION	INDICATOR SUGGESTION	Ljubljana			Maribor			Source
			2014	2019	2019/2014	2014	2019	2019/2014	
<b>SOCIAL IMPACTS</b>									
<b>EDUCATION</b>	Increase in interest in working in tourism	Number of graduates of tourism education programmes by municipality of residence	48	34	71	26	32	123	SURS SI-STAT, on demand
		Share of tourism graduates in the total number of graduates by municipality of residence	1.8%	2.2%	124	5.9%	6.6%	111	SURS SI-STAT, on demand
		Number of secondary school graduates by municipality of residence	16	33	206	34	41	121	SURS SI-STAT, on demand
<b>RECOGNITION AND INFLUENCE</b>	Increase in the city's international connectivity	Number of sister towns	19	19	100	12	14	116,67	Wikipedia Ljubljana, Maribor
	Increase in the city's international influence	Improvement in GaWCRN ranking (only for LJ)	Gama +	Gama	Yes	-	-	-	Globalization and World Cities (GaWC)
	Increase in the city's international visibility	Improvement in Mercer ranking	76 <sup>th</sup> place	74 <sup>th</sup> place	Yes	-	-	-	Mercer, Quality of living city ranking
<b>ECONOMIC IMPACTS</b>									
<b>JOB</b>	Increase in number of people working in tourism	Number of people employed in tourism (by year)	12,007	15,631	130	3,811	4,727	124	SURS SI-STAT, on demand
	Increase in number of people employed in tourism during the peak season	Ratio of number of employees (August vs. January)	1.02	1,01	134	1.02	1.02	42	SURS SI-STAT, on demand
	Increase in share of employees in tourism	Share of total employment	5.9%	6.7%	113	6.9%	6.7%	97	SURS SI-STAT, on demand
	Increase in seasonal and precarious work in tourism	Number of advertisements for student jobs in tourism and catering	-	2,333	-	-	2,044	-	SURS SI-STAT, on demand
	Increase in seasonal and precarious work in tourism	Price per student hour for tourism work (net pay per hour)	-	6,1	-	-	5,8	-	SURS SI-STAT, on demand
	Increase in jobs in managerial positions in tourism	Number of employees in managerial positions	748	788	105	179	185	103	SURS SI-STAT, on demand
<b>GDP</b>	Growth in share of tourism in the GDP of the city (region)	Share of tourism in gross value added by industry, basic prices, region (GHI activity - trade, gastronomy and transport)	21.3	22.2	104	17.3	17.7	102	SURS SI-STAT, on demand
	Growth in gross value added of activities	Gross value added for the activity GHI - trade, gastronomy and transport, million EUR	2,545	3,502	138	737	948	129	SURS SI-STAT, on demand
	Increase in income of people living in the city centre	Average gross income per recipient in the city centre	16,362,00	19,321,00	118	12,795,00	15,065,00	118	SURS SI-STAT, on demand
	Growth in daily consumption	Average daily consumption of foreign tourists (high season)	149,57	150	100	105	103	98	SURS SI-STAT, survey
<b>TOURIST OFFER</b>	Increase in visits of the main attractions	Annual number of visitors to the most visited attractions (Ljubljana Castle/Old Vine)	1,129,049	1,336,190	118	52,310	56,488	108	Annual report Ljubljana Castle, Maribor Tourism Organisation
	Increase in prices of museum ticket	Price of a one-day ordinary ticket to the City Museum (EUR)	6	6	100	3	5	100	Museum and Galleries of Ljubljana
	Growth in purchases of city tourist cards	Number of tourist cards sold	1,656	8,494	513	-	-	-	Annual report Ljubljana Tourism Organisation
<b>PRICES</b>	Increase of prices	Annual consumer price index (for SI)	100.2	101.6	101	100.2	101.6	101	SURS SI-STAT, statistical data
	Decrease in purchasing power	Local purchasing power (personal inflation)	83	89	107	83	89	107	SURS SI-STAT, statistical data
<b>TOURIST RENTAL OF APARTMENTS</b>	Increase in tourist use of housing stock	Number of active advertisements (last quarter of the year, i.e. Q4)	1,341	2,102	157	87	150	172	AirDNA
	Increase in tourist use of housing stock	Share of dwellings advertised for more than 3 months	-	75	-	-	70	-	AirDNA
	Increase in tourist use of housing stock	Share of properties being fully let	-	79	-	-	77	-	AirDNA
	Increase in tourist use of housing stock	Share of dwellings occupied for more than 3 months	-	54	-	-	41	-	AirDNA

IMPACT GROUP			Ljubljana			Maribor			Source
ENVIRONMENTAL - TERRITORIAL IMPACTS	IMPACT DESCRIPTION	INDICATOR SUGGESTION	2014	2019	2019/2014	2014	2019	2019/2014	
WASTE	Growth in collected waste	Total waste collected per capita	350	382	109	321	351	109	SURS STAGE
POLLUTION	Increase in noise	Noise level	-	-	-	-	-	-	Slovenian Environment Agency
	Increase in emissions	Number of days per year with exceeded values of the PM10 emission limit	55	51	93	-	-	-	Slovenian Environment Agency
LAND USE	Increase in land use for tourism	Total area for gastronomy in public areas (m <sup>2</sup> )	-	-	-	3,327	5,758	173	City Municipality of Maribor
	Increase in income from the rental of public spaces	Revenue of the municipality from the letting of public areas (EUR)	-	-	-	413,000	432,920	105	City Municipality of Maribor
	Increase in tourism capacity	Number of total beds	18,089	20,945	116	4,083	6,160	151	SURS SI-STAT, statistical data
Number of beds in hotels and similar establishments		5,555	6,197	112	2,192	-	-	SURS SI-STAT, statistical data	
REAL ESTATE MARKET	Rising house prices	Average rental price per m <sup>2</sup> for flats in the city (41 to 70 m <sup>2</sup> flats)	6,3	6,5	103	4,3	€4,4	102	Surveying and Mapping Authority of the RS
		Average price per m <sup>2</sup> sold for dwellings in the city €/m <sup>2</sup>	2,040	2,800	137	1.050	1.340	128	Surveying and Mapping Authority of the RS
	Increase in housing sales	Number of purchase contracts concluded for apartments in the city	1,522	1,759	116	788	868	110	Surveying and Mapping Authority of the RS
	Increase in prices of pubs	Average rental price per m <sup>2</sup> for premises in the city	12,8	15	117	8,2	9,8	120	Surveying and Mapping Authority of the RS
		Average price per m <sup>2</sup> sold for premises in the city	1,930	1,420	74	980	970	99	Surveying and Mapping Authority of the RS
Increase in sales of pubs	Number of purchase contracts concluded for premises in the city	81	78	96	34	36	106	Surveying and Mapping Authority of the RS	
MOBILITY	Increase in users of bicycle rental systems	Number of users of bicycle rental systems	750,000	1,100,000	147	-	-	-	Uporabna stran, spletni medij
	Growth in the share of public passenger transportation in the modal split	Share of tourists travelling by private car (2015, 2019)	33	43	130	62	59	95	SURS SI-STAT, statistical data
		Share of tourists travelling by public transport	7.7	4.47	58	12.41	2	16	SURS SI-STAT, statistical data
Increase in the share of tourists travelling by plane	Share of tourists travelling by plane	57.6	47	82	19.01	32	168	SURS SI-STAT, statistical data	
GOVERNANCE IMPACTS	IMPACT DESCRIPTION	INDICATOR SUGGESTION	2014	2019	2019/2014	2014	2019	2019/2014	
TAX	Increase in tourist tax	The amount of the tourist tax	1.27	3.13	247.4	1.01	2.5	248	Ljubljana Tourism
	Increase in earmarked spending of the tourist tax	Share of the tourist tax collected to be used for tourism development	84.4	25.75	30.5	-	-	31	Ljubljana Tourism
	Increase in the amount of tourist tax collected	Total funds collected	861,395	5,150,854	598	-	-	598	Ljubljana Tourism
TOURIST ORGANISATION	Increase in the number of staff at the tourist information centres and Ljubljana Tourism	Number of employees at tourism information centres and Ljubljana Tourism	30	36	121.2	-	-	121	Ljubljana Tourism
	Strengthening strategic planning	Current tourism development strategy	Yes	Yes	Yes	Yes	Yes	Yes	Ljubljana Tourism, Maribor Tourism
	Increased expenditure on tourism promotion	Ljubljana Tourism's annual promotion budget	953,623	1,278,208	134	-	-	-	Ljubljana Tourism
TOURIST PRODUCTS	Increase in the number of multi-day music/cultural festivals	Number of multi-day music/cultural festivals	58	66	113,8	-	-	-	Culture.si, online media



IMPACT GROUP	IMPACT DESCRIPTION	INDICATOR SUGGESTION	Ljubljana			Maribor			Source
			2014	2019	2019/2014	2014	2019	2019/2014	
HERITAGE PROTECTION	New entries on the cultural heritage list	Number of new entries on the cultural heritage list	0	0	0	-	-	-	Ministry of Culture RS
	New entries on UNESCO lists	Number of entries on UNESCO lists	1	1	100	0	0	0	UNESCO World Heritage
	New entries on UNESCO lists	Number of applications for UNESCO entry list	0	1	Yes	0	0	0	UNESCO World Heritage
PUBLIC SPACE	More events in public spaces	Number of consents for events in public spaces	-	-	-	29	48	166	City Municipality of Maribor
INFRASTRUCTURE	Construction of new tourist facilities	Number of building permits for tourist facilities	-	-	-	8	9	113	City Municipality of Maribor
MOBILITY AND ACCESSIBILITY	Increase in the number of public transportation products for tourists	Number of public transportation products for tourists	3	4	133,3	-	-	-	Public Company Ljubljana Parking and Markets (JP LPT)
	Increase in the price of an hour of parking in the city centre	Price per parking hour in the city centre, street	0,7	0,8	114,3	0,8	0,8	100	Uporabna stran, online media
	Increase in the price of an hour of parking in the city centre	Price per parking hour in the city centre, garage	1,2	1,5	125	1	1	100	Uporabna stran, online media
	Increase in the number of scheduled flight destinations (summer, winter)	Number of regular destinations (winter timetable)	19	16	84,2	0	0	0	Uporabna stran, online media
	Increase in the number of passengers traveling by plane	Number of passengers traveling by plane	1,338,619	1,727,136	129	0	0	0	EX_YU Aviation News, online media
	Increase in the number of international rail connections per day	Number of international rail connections per day	13	15	115,4	6	6	100	Annual report Slovenian Railways
CERTIFICATES	Sustainable orientation of tourism	Number of certificates, awards for sustainable tourism	1	3	300	0	0	100	City Municipality of Ljubljana, Maribor Tourism Organisation

## About the authors



**Uroš Horvat**, PhD in Geography, is an Assistant Professor at the Faculty of Arts, University of Maribor. His main areas of expertise are population geography and tourism geography. His main research interests are the development and demographic characteristics of the population in Slovenia, especially in Maribor, and in demographically deprived areas in north-eastern Slovenia. Another area of interest is the study of the characteristics of tourism development and tourist arrivals to Slovenia, particularly in cities and especially health resorts. His research work has been published in numerous scientific journals and other publications, among which two independent scientific monographs stand out: *The Population of Maribor - Development and Characteristics of the Population* (University of Maribor, 2020) and *Development and Effects of Tourism in Rogaška Slatina* (Research Centre of the Slovenian Academy of Sciences and Arts, 2000). He is a lecturer at the Department of Geography of the Faculty of Arts, University of Maribor, where, in addition to the above-mentioned topic areas, he also covers the field of regional geography of America. He has been a guest lecturer at the geography departments of several European universities, in Prague, Krakow, Frankfurt, Olomouc, Pecs, and Istanbul. He is a member of the editorial boards of two scientific journals and is an active member of the Association of Slovenian Geographers. In the monograph he contributed to Chapters Four and Nine.



**David Klepej** is a Junior Researcher at the Department of Landscape Architecture, Biotechnical Faculty, and a PhD student in the field of social sciences and humanities - the Environmental and Spatial Studies at the Faculty of Social Sciences, both members of University of Ljubljana. His dissertation focuses on the responsiveness of spatial planning to the growth of urban tourism. Previously, he obtained a Bachelor's Degree in Geodesy and a Master's Degree in Spatial Planning at the Faculty of Civil Engineering and Geodesy, University of Ljubljana, and is completing a Master's Degree in Sustainable Development Management at the Faculty of Management, University of Primorska. At the Department of Landscape Architecture, he is currently carrying out research work on the Horizon 2020 SPOT project - *Innovative Social Platform for Cultural Tourism and its Potential for Enhancing Europeanisation* and the Slovenian Research agency's MESTUR project - *Analysis and Management of the Spatial and Social Impacts of Urban Tourism on the Case of Ljubljana and Maribor*. He has experience in the private and public sector in Slovenia and abroad, where he has been a visiting researcher at the University of Graz, the University of Vienna, the German Institute for Urban Planning and the Icelandic Planning Agency, and has held a traineeship at the European Commission. His work focuses on sustainable development, planning, social and regional policy, mobility and tourism. He contributed to Chapters Seven and Nine of the monograph.

**Manca Krošelj** studied Landscape Architecture at the Biotechnical Faculty, University of Ljubljana, where she obtained her Master's degree in Landscape Architecture in 2017 and was awarded the Faculty's Prešeren Prize for her Master's thesis. She gained work experience abroad, in Berlin, where she worked in a landscape architecture office, and in Slovenia, at the Department of Landscape Architecture at the Biotechnical Faculty, where she has been working as a researcher since 2018. At the department, she has been involved in projects such as trALLS - *Transformation of Alpine Industrial Landscapes* (ERDF, 2018-2021), SPOT - *Innovative Social Platform for Cultural Tourism and its Potential to Enhance Europeanisation* (H2020, 2020-2022) and TIA-SI - *Development and proposal for implementation of the instrument to support the harmonisation of the sectoral and other development policies with the Spatial Development Strategy of Slovenia* (Slovenian Research Agency, 2021-2023). Her research covers topics such as the transformation of degraded urban areas, policy analysis, spatial governance, and the territorial impact assessment of policies and cultural tourism. She is also active in the field of illustration and graphic design, and has exhibited her work at home and abroad. She contributed to the monograph in Chapter Eight, Nine and as designer and illustrator of the monograph.



**Naja Marot** obtained her PhD in 2010 at the Faculty of Civil Engineering and Geodesy, University of Ljubljana, on the topic of Regulatory Impact Assessment. Assessment was performed on Slovenian spatial planning legislation. Her research topics include spatial planning, regional development, policy analysis, Territorial Impact Assessment, post-industrial areas and cross-sectoral research between spatial planning and other sectors. Recently, her research has focused on urban and cultural tourism. Since 2015, she has been teaching Tourism and Recreation and Regional Planning at the Department of Landscape Architecture, Biotechnical Faculty, University of Ljubljana. She has been involved in numerous national and international projects funded by the INTERREG programme, such as: Alpine Space, Central Europe, and other programmes, such as: ESPON, COST and Horizon 2020 programmes. She has been a visiting researcher at the University of Michigan in the USA, the German Federal Institute for Research on Building, Urban and Spatial Development, the Leibniz Institute of Ecological Urban and Regional Development in Dresden, the University of Seville, the Hafencity University Hamburg - HCU and, most recently, the Politecnico di Torino in Italy. She edited the monograph and contributed to the introductory and concluding chapters as well as Chapters Two, Five, Eight and Nine.





**Irena Ograjenšek** is a Professor of statistics at the School of Economics and Business, University of Ljubljana, and since 2014 has been a visiting professor at the Wirtschaftsuniversität Vienna (WU Wien). She studied upon the PhD programmes of the University of St. Gallen, Switzerland, and Emory University, USA. Her research focuses on the challenges of measuring employee and customer satisfaction and service quality at an individual organisational level. At the industry/economy-wide or regional/state levels, her main research focus in recent years has been on competitiveness, economic growth, urban revitalisation, labour markets, and local community development, applying qualitative and survey research methodologies in her analysis. She is the author or co-author of numerous articles published in scientific journals at home and abroad. She was President of the European Network for Business and Industrial Statistics (ENBIS) from 2009 to 2011 and continues to participate as a member of its Council, having been appointed an Honorary Member in 2020. She was Vice-President of the International Association for Statistical Education (IASE) from 2009 to 2013. She was elected Council Member of the International Society for Business and Industrial Statistics (ISBIS) at the World Statistical Congress held in Hong Kong in August 2013, and became Vice-President of the ISBIS (with a focus on scientific research) at the World Statistical Congress held in Marrakech in July 2017. During the 2015-2019 term of office, she also served as an elected member of the Council of the International Statistical Institute (ISI), the oldest and most respected international association of statisticians. Since then, she has again intensified her focus on the challenges of statistical education and the synergistic effects of qualitative and quantitative research methods. Her conceptual and research contributions on these topics have been discussed in eminent scientific journals such as the Harvard Data Science Review, the International Statistical Review, the American Anthropologist and the American Statistician. She contributed to Chapter Eight and Nine of the monograph.



**Nina Stubičar** as a student participated in the Student Innovative Project for Social Benefit programme, called V-Kultur – *Evaluation of the Cultural Tourism Offer in Ljubljana* (2016–2020). Later, she continued to pursue her research interest in the project MESTUR – *Analysis and Management of the Spatial and Social Impacts of Urban Tourism in the Case of Ljubljana, Graz and Maribor* (financed by Slovenian Research Agency, 2019–2022). In 2021, she joined the Department of Landscape Architecture as a researcher, where she is involved in the project SPOT – *Social and Innovative Platform on Cultural Tourism and its Potential Towards Deepening Europeanisation* (H2020, 2020–2022). Her research work includes collecting and analysing statistical data and visual and graphic design. In her masters thesis she studies urbanism and alternative art in the autonomous space of Metelkova in Ljubljana. She contributed to the monograph as a designer and as an author to Chapters Two, Three, Five, Six and Nine.



**Matjaž Uršič** is an Associate Professor and Research Fellow in sociology at the University of Ljubljana. His primary research interests are the processes of socio-cultural transformation of cities and contemporary urban phenomena in the context of globalisation processes. His current research focuses on comparative studies of spatial and environmental changes in the introduction of new technologies in European and East Asian cities. In particular, it focuses on a multi-faceted analysis of social and physical-spatial phenomena of urban development through the study of interactions, and influences between different stakeholders, users and services involved for an adequate quality of life in cities. He is involved in a number of national and international research and development projects dealing with the revitalisation and changing roles of urban centres, such as: H2020, Smart Urban Futures, ERA NET EU - JPI Urban Europe, NRF Joint Research Programme South Korea - EU, ERDF - Central Europe, European Regional Development Fund (ERDF - MED), MSCA-RISE etc. He lectures at the Faculty of Social Sciences, Faculty of Architecture, Biotechnical Faculty and Faculty of Civil Engineering and Geodesy at the University of Ljubljana. He has worked as a researcher and lecturer at a number of East Asian universities, such as: Tokyo Metropolitan University, University of Seoul, Soongsil University, Kwangwoon University, and Kyungpook National University, and is a member of a number of editorial boards of international scientific journals. He is active as an author of publications in the field of urban sociology. A selection of recent books include: *Creativity in Tokyo - Revitalising a Mature City* (Palgrave Macmillan, Springer 2020), *The role of traditional marketplaces in the post-industrial city - A comparative analysis of influences of urban renewal in Korea and Europe* (Trinity College Dublin, Trauben Turin, 2013), *Anti-urbanism as a way of life* (Faculty of Social Sciences, University of Ljubljana, 2007), *Creative urban regeneration* (Institute for spatial policies - IPoP, 2012), and *Urban spaces of consumption* (Faculty of Social Sciences, University of Ljubljana, 2003). He contributed to the introduction and Chapter Nine, wrote Chapter Seven, and helped to edit the book.

# About the projects

## Project group

Naja Marot  
David Klepej  
Nina Stubičar  
Matjaž Uršič  
Uroš Horvat  
Irena Ograjenšek  
Lejla Perviz

## Partners

Biotechnical Faculty (UL),  
Faculty of Economics  
(UL), Faculty of Social  
Sciences (UL), Faculty of  
Arts (UM)

## Duration

July 2019 - June 2022

## Value

150,000 EUR

## Programme

Basic project, financed  
by the Slovenian  
Research Agency, ARRS

## Role

Biotechnical Faculty (UL)  
as lead partner



## MESTUR: Analysis and Management of the Spatial and Social Impacts of Urban Tourism in the Case of Ljubljana, Graz and Maribor

Cities and urban areas are an important tourist attraction and the number of visitors to cities has been steadily increasing in recent years. The steady growth in the number of urban visitors contributes to the economic well-being of cities, but also generates a number of spatial, social, environmental and economic impacts. Although urban tourism as a topic of research has become well established over the last decade, cities have only recently started to develop measures to adapt to and mitigate the impacts of tourism; the absence of management solutions is clearly evident in tourism and spatial strategies at all levels of governance. The spatial dimension of urban tourism is thus the main theme of the project, which we have addressed through two research questions: 1) what are the spatial and social impacts of urban tourism in cities; 2) what solutions do spatial planning and territorial governance offer to mitigate these impacts. The answers to the two research questions were sought through a combination of qualitative and quantitative methods (analysis of tourism statistics in the cities, survey with tourists, workshops with representatives of public institutions and the profession, and cartographic analysis). The research was carried out in the area of the City Municipality of Ljubljana and the Municipality of Maribor; the work was organised in four work packages. The key outcome of the project is a model for sustainable urban tourism governance and planning.

More at: <https://www.bf.uni-lj.si/sl/raziskave/raziskovalni-projekti/56/analiza-in-upravljanje-prostorskih-in-druzbenih-ucinkov-mestnega-turizma-na-primeru-ljubljane,-gradca-in-maribora>



## SPOT: Social and Innovative Platform on Cultural Tourism and its Potential Towards Deepening Europeanisation

The forms of (cultural) tourism and the characteristics of tourist destinations are evolving. Tourists are no longer just passive observers of tourist attractions, but tend to actively experience the culture of a destination. Modern tourism trends bring new opportunities for the economic development of less developed rural areas, while at the same time posing challenges for the preservation of local cultural values and identity. The main objective of the project was to explore new ways of understanding cultural tourism, such as authentic and media tourism, and to use this as a basis for promoting the development of less developed areas. Based on modern digital technologies, and statistical and spatial data, the project developed an innovative tool to identify the potential of different types of cultural tourism and address the importance of tourism as a development opportunity and development challenge for local stakeholders. We have described in detail the state-of-the-art of cultural tourism in 15 selected case study areas and also addressed the challenges posed by the pandemic for cultural tourism. We took a closer look at the stakeholders in the field of cultural tourism, their roles, and their good practices in product development and/or marketing of cultural offers.

More at: <http://www.spotprojecth2020.eu/>



The project is funded by the European Union's Horizon 2020 research and innovation programme under contract number 870644.

## Project group

Naja Marot  
Manca Krošelj  
David Klepej  
Nina Stubičar

## Partners

Partners from the 14 EU countries and Israel

## Datum trajanja

January 2020 -  
December 2022

## Value

3,000,000 EUR

## Programme

Horizon 2020

## Role

Biotechnical Faculty (UL)  
as project partner





