



ARE TOURISM STRATEGIES RESPONSIVE TO CRITICAL EVENTS? COPING WITH THE COVID-19 PANDEMIC IN SLOVENIAN URBAN DESTINATIONS LJUBLJANA AND MARIBOR

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Abstract

In 2020, the COVID-19 pandemic brought tourism to an abrupt halt. Supply-side stakeholders suddenly found themselves in a lockdown with unusable assets, unprofitable investments and jobs in jeopardy. Using qualitative research, we take a closer look at how they dealt with this unprecedented crisis in the Slovenian urban destinations of Ljubljana and Maribor. Our results show that existing policy and strategy mechanisms did not equip the supply-side stakeholders to tackle the pandemic challenges. However, both institutional ad hoc responses were quick and to some extent adequate.

Keywords: COVID-19 pandemic, crisis management, governance, qualitative research, policy making, middle-sized European cities, strategic planning, urban tourism

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SO TURISTIČNE STRATEGIJE ODZIVNE NA KRITIČNE DOGODKE? ODZIV NA PANDEMIJO COVIDA-19 V SLOVENSКИH MESTNIH DESTINACIJAH LJUBLJANA IN MARIBOR

Izvleček

V letu 2020 je pandemija covid-19 nenadoma zaustavila turizem. Turistični ponudniki so se znašli sredi zaprtja z neuporabnimi sredstvi, nedonosnimi naložbami in ogroženimi delovnimi mesti. S kvalitativno raziskavo smo podrobneje proučili, kako so se s to krizo brez primere spopadli v slovenskih mestnih destinacijah Ljubljana in Maribor. Naši rezultati kažejo, da obstoječe politike in strateški mehanizmi deležnikov niso opremili za uspešno spopadanje z izzivi pandemije, vendar so bili tako institucionalni kot ad hoc odzivi hitri in do neke mere ustrezni.

Ključne besede: pandemija covid-19, krizni management, upravljanje, kvalitativne raziskave, priprava politik, srednje velika evropska mesta, strateško načrtovanje, mestni turizem

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1 INTRODUCTION

The last twenty years were crucial for development of the urban tourism both in research (Ashworth, Page, 2010; 2011; Edwards, Griffin, Hayllar, 2008; Shoval, 2018) and in practice. The focus of urban tourists moved from classical motivation of cultural tourists to niche tourists interested in the urban lifestyle, open spaces, architecture and vibrant atmospheres of urban destinations (Boivin, Tanguay, 2019; Fuller, Michel, 2014; Marot, Stubičar, 2022); from the primary European urban destinations such as London, Berlin or Paris, to second-tier ones, like Bologna, Ljubljana, and Turin. For better understanding of this phenomenon, Šauer et al. (2021) inspected Central European tourist flows. Enablers like low-cost airlines, shared economy accommodation and others have made cities accessible to tourists as never before. In consequence, many urban destinations became overcrowded and overtouristed. Tourists have brought with them conflicts with, and provoked opposition from the residents (Klepej, Stubičar, Marot, 2022; Martín Martín, Guaita Martinez, Salinas Fernandez, 2018; Milano, Novelli, Cheer, 2019; Novy, Colomb, 2019). Similar development path also occurred in the capital city of Slovenia, Ljubljana (Horvat, 2019; Kuščer, Mihalič, 2019; Stubičar, 2022), which has found itself on the global tourist map with one of the fastest increase of arrivals in Central Europe (+10% per year) and heavily promoted diversification of the tourists' origin

markets. Our second showcase, the city of Maribor, on the other hand, faced a modest (low in absolute numbers) increase (Horvat, Stubičar, 2021; Horvat, 2022).

Amidst this maturing phase of the two destinations according to the Butler's cycle (Getz, 1992), the COVID-19 pandemic happened. Tourism, which was in Ljubljana strongly integrated into the local economy and social environment, and in Maribor moderately so, has practically disappeared over night, and empty city centres have suddenly become proof of the vast spatial and social effects of this economic sector. In Koh's words (2020): "the pandemic has turned the state of tourism in many cities from 'over-tourism' to 'no tourism'".

So far, researchers focused on different impacts COVID-19 caused in the cities. Liang et al. (2021) analysed impact and changes in vacations rentals, Frago (2021) on retail industry, Pasquinelli et al. (2021) on social media city branding and Kunzmann (2020) on smart cities. Anguera-Torrell et al. (2021) have calculated the urban tourism performance index to evaluate an overall performance of the cities in the challenging period. Further to that, Seraphin and Dosquet (2020) illustrated that pandemic caused the urban population exodus as was the case in Paris where 10% of population have left the city and fled to their second homes in rural and mountainous areas of France. The same patterns of behaviour were discovered in Sweden. The increased time people spent in their secondary homes put pressure on existing infrastructure and services (Åberg, Tondelli, 2021).

In Slovenia, the last recorded crisis of similar proportions began in 1991. The decrease in the number of foreign tourist arrivals which started with the declaration of national independence, lasted for over ten years. The current crisis, which started only a few months before the main tourist season of 2020, has forced tourism providers into adjusting their offer and governments into stronger intervening in this otherwise predominantly market-oriented economic sector (Fong, Law, Ye, 2021; Koh, 2020). Various authors (e.g. Jones, Comfort, 2020; Yeoman, 2020) claim that crisis represents a great opportunity for rebranding the sector and, especially, a push for implementation of alternative, more sustainable and mostly more resilient governance practices as well in this sector. Discussions on both sustainable development and risk management for tourism in Ljubljana have started a decade ago (Dwyer et al., 2012). How well a city or destination can act in this regard, depends also on its responsiveness. By responsiveness we understand the ability of (public) actors and policies to sense and adjust to both foreseen and unforeseen changes (Degner, Leuffen, 2020; Rauws, 2017; Salet, 2006; Salet, Woltjer, 2009). Improved responsiveness of public governance on all levels is seen as one of the priorities and a facilitator of future tourism development also by the OECD (2018), especially considering quick technological development both in the tourism sector and in general.

In this paper, we examine the urban tourism strategies and supply-side stakeholders' response to the COVID-19 pandemic in the Slovenian urban destinations Ljubljana and

Figure 1: Ljubljana in April 2020, during the lockdown (Photos: D. Klepej).



Figure 2: Maribor in April 2020, during the lockdown (Photos: D. Klepej).



Maribor. We apply the Sigala (2020) categorisation when addressing the tourism management issues such as existing strategies for crisis management, responses to pandemic in this manner, impact of public interventions on functioning of the sector, and professional perception of the crisis by the supply-side tourist services providers. In order to do this, we start with a short overview of the COVID-19 effects on urban tourism in Slovenia and the existing tourism strategies at the time when the pandemic hit. We then present both the qualitative methodology we used (based on the semi-structured interviews) and the results of the interviews. The aim of our discussion in the final part of this paper is to evaluate how responsive the current strategies are to critical events and how much, if at all, pandemic contributed to improving their responsiveness.

2 EFFECTS OF THE COVID-19 PANDEMIC ON URBAN TOURISM AND POLICY RESPONSE IN SLOVENIA

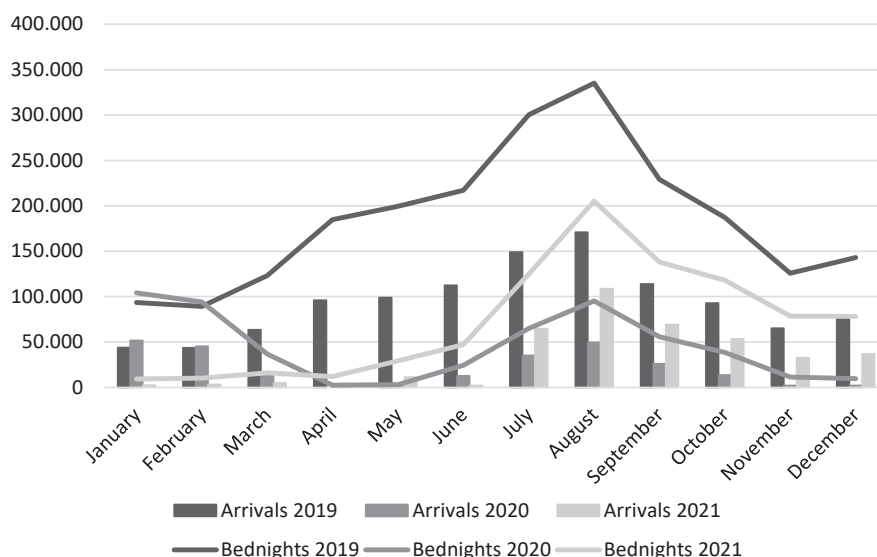
Similar to other EU countries, the COVID-19 pandemic was declared in Slovenia on March 12th, 2020. On April 24th, 2020 the Slovenian Tourist Board (STB) and the Ministry of Economic Development and Technology (MEDT) established a consultative Council for Tourism consisting of the major national tourism stakeholders and associations (MEDT, 2020a). The Council discussed important tourism issues and offers proposals, formulated legal measures, opinions and positions regarding strategic guidelines, financial incentives and proposals for changes in the development and promotion of tourism, especially in the light of mitigating the effects of the coronavirus epidemic on Slovenian tourism, all this in cooperation with the health care professionals (MEDT, 2020a). The measures were announced in several steps, always as part of the COVID-19 measures packages prepared by the government. The analysis of the then-existing national policy (Strategija trajnostne rasti slovenskega turizma 2017–2021; Strategy of sustainable growth of Slovenian tourism 2017–2021) showed lack of any measures prepared to be put in place in case of a crisis. And this despite the fact that the same document recognises the huge impacts that the economic crisis of 2009–2012 had on the Slovenian tourism sector (also due to lack of its preparedness and lacklustre response) as well as possible impacts the potential other economic, political or safety (terrorist) crises in Slovenia or wider region might have on Slovenian tourism. Other than general goals (such as pursuing good financial structure of companies or maintain a high level of safety in the country) there are no specific measures prepared to tackle these foreseen discrepancies. As such, in 2020, the response to the new reality needed to be prepared *ad hoc*.

Two major measures marked the year 2020: the first one is launching the campaign “*Now is the time for you, my Slovenia*” on May 14th, with intention to give the domestic tourism a major push, and the second one the introduction of the so-called tourist vouchers on May 29th. Every permanent resident of Slovenia over the age of

18 received 200 EUR, while those under the age of 18 received 50 EUR. In 2020, the vouchers were to be spent on accommodation in registered Slovenian tourism facilities; in 2021 it was also possible to use the money for cultural activities, e.g. buying books. The total value of this measure was estimated at 345 million EUR. It was expected that tourists would spend an additional 172 million EUR in selected destinations (RTV SLO, 2020). By the end of September 2020, 833 thousand vouchers were used. Of these 114 million EUR, only 1.2% were spent in the city of Ljubljana and 0.7% in the city of Maribor (FORS, 2020); a total of only 2.15 million EUR “subsidies” to help urban tourism in these two cities survive the pandemic. In addition, STB, MEDT, the Tourism and Hospitality Chamber of Slovenia, and the National Institute of Public Health published Responsible Travel Standards of Slovenian Tourism (STB, 2020). These contain a collection of hygienic recommendations for tourism and hospitality activities, identify tourism business opportunities in the post-corona period and provide guidelines for communication between hosts and guests. Furthermore, the government financed the payment of furlough for the employees in the sector.

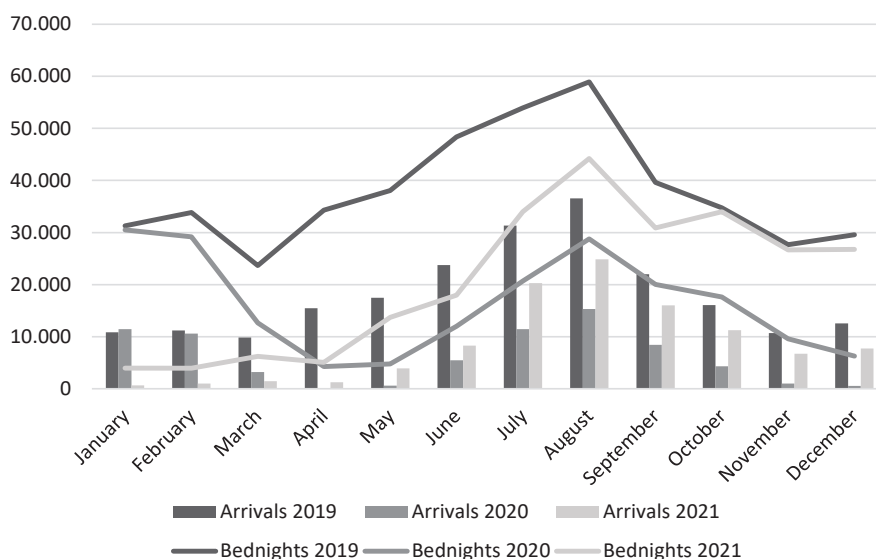
In the second half of 2022, we were better equipped to assess the effects of the pandemic on the tourism sector. Compared to the pre-pandemic year 2019, 71% less registered overnight stays by foreign tourists were recorded in Slovenia in 2020. In 2022, this number was still down by 58% (SURS, 2022a). The total decrease was smaller as the number of overnight stays by domestic tourists, largely due to tourist vouchers, increased. Compared to 2019, the decrease in overnight stays of foreign tourists in Ljubljana was significant: –79% in 2020 and –65% in 2021. The same goes for Maribor, –62% in 2020 and –52% in 2021. In 2019, the overnight stays in Ljubljana accounted for 10.5% of the Slovenian total. Of this total, only 2.2% were attributed to domestic and 97.8% to the foreign tourists’ overnight stays. Taking into account (1) the average tourist spending of 160 EUR daily in Ljubljana and 122 EUR daily in other Slovenian urban municipalities (SURS, 2020b), and (2) the 2.2 million overnight stays recorded in Ljubljana and a little over a million in other city municipalities in 2019; in the last ‘normal’ year the daily urban tourist expenditures represented almost 500 million EUR of tourism revenues in Slovenia. With the recorded pandemic-related decline in overnight stays, the loss of the Slovenian tourism sector in 2020 amounted to approximately 270 million EUR in Ljubljana and 30 million EUR in Maribor.

Figure 3: Tourist arrivals and bednights in Ljubljana from 2019 to 2021.



(Source: SURS, 2022a).

Figure 4: Tourist arrivals and bednights in Maribor from 2019 to 2021.



(Source: SURS, 2022a, c).

3 METHODOLOGY AND DATA COLLECTION PROCESS

Our empirical data were collected in the framework of the national research project *MESTUR – Analysis of Territorial and Social Impacts on the Urban Tourism and Its Territorial Governance: The Cases of Ljubljana, and Maribor*. The project started in 2019 with the purpose to evaluate the (at that point in time more and more prevalently negative) impacts of urban tourism in a comprehensive manner. However, in the wake of the COVID-19 pandemic, we partially adjusted our research design in 2020.

As a consequence, we decided to apply qualitative methodology based on a sample that can be characterized both as convenience and expert sampling: we conducted a series of semi-structured interviews with supply-side stakeholders who have already participated or expressed their willingness to participate in workshops and other activities of the MESTUR project (see Table 1). This is in line with the approach of Paraskevas et al. (2013) who explore crisis knowledge in tourism and van der Zee et al. (2017) who explore governance networks in tourism. We attempted to obtain an assessment of the institutional readiness to respond to the COVID-19 pandemic and the current strategies in place to address the issue (see Marot et al., 2020, for more details). The interview guide contained seven open-ended questions. These were dedicated to the evaluation of the current pandemic situation, the institutional approach towards adaptation of activities planned before the pandemic, institutional and personal strategies on tackling the crises, relationships between the state and the tourism sector, and the expected duration of the pandemic impact on their institution as well as the tourism sector as a whole.

Table 1: Interviewed tourism and planning stakeholders in Ljubljana and Maribor according to their role.

Administrative level	Ljubljana	Maribor
National level	<ul style="list-style-type: none"> • Tourism and Hospitality Chamber of Slovenia (TGZS) • Faculty of Tourism Studies, Turistica, University of Primorska (FTŠ) • Sava Tourism (national hotel chain) 	
Regional level	/	<ul style="list-style-type: none"> • Maribor Development Agency (MRA)
Local level (management)	<ul style="list-style-type: none"> • Tourism Ljubljana • City Municipality of Ljubljana (MOL), planning department 	<ul style="list-style-type: none"> • City Municipality of Maribor (MOM), planning department • Maribor Tourist Board
Local level (suppliers)	<ul style="list-style-type: none"> • Ljubljana Castle • Museums and Galleries of the City of Ljubljana (MGML) • Poligon Creative centre 	<ul style="list-style-type: none"> • Hotel City Maribor • Sava hotel

The interviews were carried out in May and June 2020. This needs to be taken into account when interpreting the results. Thus, some of the stakeholders were approached before the major government measures for tourism were introduced, and some of them later on when the summer season, although significantly modified, has already started. Altogether, we interviewed four representatives of tourism providers, two representatives of local and one of national tourism organizations, two representatives of municipalities, one representative of a regional development agency, one representative of the research sphere and one representative of the creative sector. This makes a total of 13 interviewees. Due to lockdown in progress at the time, the interviews were conducted either by telephone or via video call. The key findings are reported in the next section.

4 OVERVIEW OF KEY FINDINGS

The key findings from our interviews are organized by topics. Selected verbatim quotes are provided where relevant. Firstly, the stakeholders' view of the tourism sector vulnerability and their forecast of what would happen in the pandemic are given. Secondly, relevance of existing strategic documents and contingency measures is assessed and commented upon. Thirdly, the responsibility for policy-making and action-taking is evaluated. Finally, possible positive effects of COVID-19 on urban tourism are discussed.

4.1 Vulnerability of the sector

At the beginning of the interview, each interviewee was asked about his or her personal opinion on the early 2020 UNWTO forecasts of a 30% reduction in international arrivals at the global level in 2020. Only two interviewees agreed with this UNWTO's forecast, while the rest predict a much larger decline in international arrivals with numbers going up to 80%. The decline was expected to vary greatly across different markets depending on the origin (domestic to foreign ratio) of guests and the period of validity of measures banning international travel. The representative of Ljubljana Castle thus estimated that Slovenia, as a destination with a large share of foreign guests, would have a larger decline than predicted in these forecasts, and two other interviewees saw domestic guests as saviours of the 2020 summer season. More of them mentioned that it would be necessary to change the functioning of the sector since it is very sensitive to crisis events and consequently needs to react quickly when facing a crisis situation.

Three months into the pandemic and just before the start of the tourist season, only one of the stakeholders (TGZS) actually performed a comprehensive destination assessment of losses due to the coronavirus crisis. With their larger members, they conducted an analysis of loss estimates in 2020, based on which they estimated

a 50 to 70% decrease in turnover compared to 2019. The estimates differ by destination: a larger loss was expected in internationally well-known Slovenian destinations (Bled, Ljubljana), and a smaller one in spas, where traditionally there is a larger share of domestic guests and which need to stay operational because of the health services they provide. In Maribor, the decrease was estimated at 30%. The Ljubljana tourism mostly predicted losses due to the lower demand of guided tours, excursions, lower sale of the tourist card and souvenirs. The rest of the stakeholders had at that point in time yet to evaluate their potential losses; this was mostly due to their lack of relevant knowledge, human and/or financial resources.

While the individual numeric forecasts about pandemic impacts were not unified across the interviewees, they did agree that tourist attraction and event organizers will take the most direct and profound hit. The interviewees further agreed that catering industry will get over the crisis the easiest since they could operate even in the lock down (take-away and delivery options). Hotel businesses and other accommodation providers would need longer than catering, however, they could valorise the vouchers incentive. What might represent a challenge is the new regulation and standards concerning the hygiene and disinfection. On the one hand, the hotels should have an easier job to recover than shared economy providers because of their existing standard operating procedures; on the other, tourists might prefer apartments as accommodation type due to better distancing and isolation possibilities. The impacts on the hotel business would also differ according to the ownership status and investment power of the accommodation owner. When comparing the private and public sectors, both would feel the consequences, however to a different extent. The public sector would suffer less (and for a shorter period of time) because of the public funding. The impact would be more visible in cultural institutions and tourism attractions closed for visitors because of the pandemic.

A spokeswoman for Tourism Ljubljana pointed out that the prices for (service) offer in the city have not decreased. Instead, there was concern they might go up, which would certainly not be good for local inhabitants. The COVID-19 situation has, however, not affected investments in the sector, as investment projects in the tourist infrastructure (e.g. hotel construction) in Ljubljana to this day continue as planned.

Table 2: Overview of negative pandemic effects along with mitigation measures by stakeholder groups.

Stakeholders	Negative effects of pandemic	Mitigation measures	Impact size
Tourist agencies, services providers	<ul style="list-style-type: none"> • Less turnover, less consumers 	<ul style="list-style-type: none"> • Change in the products on the market 	The largest
Event organisers	<ul style="list-style-type: none"> • Event cancellations 	<ul style="list-style-type: none"> • Events moved to 2021 • Vouchers in the sums of sold tickets • Business models with on-line offer 	
Congress tourism	<ul style="list-style-type: none"> • Event cancellations 	<ul style="list-style-type: none"> • Organisation of on-line events 	
Tourist attractions	<ul style="list-style-type: none"> • Closed, no visitors 	<ul style="list-style-type: none"> • New offer, new type of tickets, discounts 	Large
Cultural institutions	<ul style="list-style-type: none"> • Closed, no visitors 	<ul style="list-style-type: none"> • Design of new offer (web) 	
Air line companies	<ul style="list-style-type: none"> • No flights operation 	<ul style="list-style-type: none"> • Changed protocols • Some connections permanently closed down 	
Hotels	<ul style="list-style-type: none"> • Closed • Problem of travel to the destination, cleaning, deinfection, airing and serving the food and drinks <p>*Size matters.</p>	<ul style="list-style-type: none"> • Longer closure • Acting according to the hygiene standards • Benefiting from the vouchers 	Large/medium
Accommodation via shared economy options	<ul style="list-style-type: none"> • Lower trust in cleaning protocols • Illiquidity does not allow for paying of the loans 	<ul style="list-style-type: none"> • Acting according to the hygiene standards • Transfer of the offer from tourism to the real-estate market 	Medium
Catering (restaurants, ...)	<ul style="list-style-type: none"> • Closed • Smaller capacities due to the required distance 	<ul style="list-style-type: none"> • Delivery service • New services (Wolt, eHrana) • Different tables setting 	Smaller
Souvenir sellers	<ul style="list-style-type: none"> • Closed 	<ul style="list-style-type: none"> • Closed permanently. 	

4.2 Relevance of strategic documents and contingency measures

In 2020, none of the institutions included into the study could rely on strategic documents or any other measures helping them to deal with occurrence of a major crisis like pandemic. Potential safety threats such as terrorist attack were given a very low priority due to the fact that Slovenia, compared to other European countries, has always prided itself as a safe and secure destination. The possibility of an epidemic was not viewed as a potential safety issue at all. During the outbreaks of Zika, Ebola, bird flu, or SARS, Slovenia had never been directly at larger risk.

The only measures already in place were those for an event of economic and/or financial crisis similar to that in the period 2009–2012. The City Municipality of Maribor (MOM), which had faced its share of economic crises before, had a regulation of procedures for the adoption of measures should one segment of the economy be affected; in this framework, intervention measures and transfers of funds are possible. Thus, in May 2020, MOM adopted some such measures, for example city parking fee exemptions and restaurant rental deferrals.

Tourism Ljubljana postponed the adoption of the Sustainable Development and Marketing Strategy of the Tourist Destination Ljubljana and the Ljubljana Urban Region 2020–2025 due to the coronavirus to the autumn 2021. While they did not add additional measures to the document, they adjusted the indicators and reduced the growth forecasts, as financially they largely depend on tourist tax and concession fees. During the crisis, several offers for domestic tourists and special tourist programmes (the so-called Ljubljana experience) were designed for different target groups. Tourism Ljubljana also further intensified cooperation with tourist providers, e.g. Ljubljana hotels, and prepared special packages that include the benefits of various tourist services. A City Municipality of Ljubljana (MOL) spokesman reported that they actually have instructions for providers based on response scenarios in the event of a critical events such as earthquakes or terrorist attacks.

The Tourism and Hospitality Chamber of Slovenia, shorter TGZS, too, had no measures in place to deal with the pandemic, but since March 2020, in cooperation with its members and with 12 tourism associations, they co-drafted proposals for crisis mitigation measures to be forwarded to the government and responsible ministries. Most of the proposals for measures are of economic, financial and legal nature, and address specific segments of tourism, e.g. spas, gambling. The TGZS was also involved in the adoption of the third set of State aid in the event of a crisis targeting tourism. Several stakeholders (FTŠ, TGZS, Ljubljana Castle, MOL) pointed out that current tourism development strategies with orientations towards sustainable and green tourism are also appropriate in light of the pandemic. All that is needed is further and accelerated work on their proper implementation.

4.3 Responsibility for taking action in the field of urban tourism

Key issue here is the question whether tourism can be viewed exclusively as a commercial activity or not. An interviewee from FTŠ certainly did not agree with the view that tourism is exclusively a commercial activity. Although it has economic effects and needs to be promoted, it also has a socio-cultural function, in addition to environmental, which concerns the local population and the local community. According to the FTŠ interviewee, the state should first understand the complexity of tourism and the whole system of its management, which is based on different (non)formal structures and several management levels. Local and regional level are relevant at first, then national and transnational level follow. A state should understand this complexity and properly promote integration, co-operation and networking mechanisms between tourism stakeholders.

Her view was strongly opposed by a representative of the Maribor Development Agency who had a completely different opinion on state interventions in tourism:

“Tourism is an economic activity which has been closed down temporarily by the state's commanded measures, which is why the state must act responsibly after the end of these measures.”

The government's systemic approach to assisting tourism was also cited as the most important measure by representatives of MGML, MOM, Poligon Creative Centre and the Maribor Tourist Board. Several interviewees have described the measures so far as “clumsy” or “incontinual” because they did not target everyone involved in the tourism industry. Many tourism workers did not qualify at all to receive a subsidy – e.g. tour guides without income outside of the tourist season. In particular, these interviewees highlighted the urgent need for understanding of seasonality and other specifics of work in tourism and the need for overarching cooperation and communication of stakeholders in the tourism industry.

Among the criticisms of the implemented measures, stakeholders such as Poligon Creative Centre, MOL, or Maribor Tourist Board highlighted their short-term impact and their focus on primarily saving large hotel services providers. They also pointed out other governmental misunderstandings of the tourism sector, including the full nationwide lockdown instead of implementation of less stricter rules for areas with lower numbers of COVID-19 infections.

4.4 Possible positive effects of COVID-19 on urban tourism

All stakeholders agreed that the coronavirus crisis will also have positive effects. Most of them pointed out that the crisis is an opportunity to reflect on the direction of tourism towards greater sustainability as well as environmental and social responsibility of the

sector which is also related to policy-making. Stakeholders already highlighted existing green initiatives such as the green scheme of the Slovenian tourism (TGZS) and direction of the promotion of Slovenia as a green and sustainable destination. Due to the pandemic, the lower number of incoming tourists would reverse the negative effects of tourism on the environment and society; the experience of visitors would also improve due to the lower quantities of tourists altogether. In order to change the values of local population and their attitude towards fellow city inhabitants and tourists, one of the interviewees pointed out that orientation towards the niche tourism is the right choice:

“While it is necessary to develop the exclusive boutique tourism, this does not mean we go in the direction of elitist tourism. Tourism must be accessible to all people, like all other goods and services. There is much we can do in the future to develop tourism in a better direction.”

(Representative of the Faculty of Tourism Studies Turistica)

Maribor Tourist Board saw the pandemic as an opportunity for less developed and less recognizable destinations and tourist providers. They expected the domestic tourists to cash in tourist vouchers in less known regions like Podravje instead of traditional summer holiday destinations such as Croatia, the Greek islands and alike. Tourism Ljubljana expressed a will to refocus research efforts into studies calculating the carrying capacity of the environment or investigate tourist flows management practices. Generally, our interviewees believed the pandemic would result in closer cooperation of tourism providers in both the development and the promotion of tourism with the goal of better preparing themselves for possible future critical events. The expectations seemed to be that after the normalisation of the situation, tourism will eventually return to its pre-crisis scale and form. This is best illustrated in the following statement:

“Tourism has picked up after every crisis. The only difference is that, after previous crises, it has picked up faster than estimates of this crisis predict. But I am sure the sector will return to the previous level.”

(Representative of the Tourist Hospitality Chamber of Slovenia)

And the effects of the pandemic on policy-making? Firstly, one stakeholder stated that COVID-19 is not the only transformational factor for tourism, but that tourism is also more strongly influenced by other global changes, such as global population growth, ageing, internet-based solutions and digitalisation which should be taken into account in the transformation process. Secondly, a caution was advised with regard to adopting the most severe measures like mandatory quarantine, border closures and restrictions on border crossings and travel bans in the face of further waves of

coronavirus infections. Thirdly, promotional campaigns were recognised as one way of managing the tourist flows also in the times of pandemic.

Besides the overall sector adaptations, individual adjustment were also made by the stakeholders in question, although not necessarily supported or initiated by the policies or government. The inconclusive list included:

- maintenance work done on the accommodation buildings;
- promotional activities via different channels (on-line meetings, e-news for business partners and tourist agencies);
- preparation of new tourist products or adaptation of the old ones that they are more financially accessible to the domestic visitor;
- digitalisation of the cultural offer and cultural events;
- documentation of the pandemic period by the citizens as an art project;
- on-line meetings, events and seminars for tourism providers;
- adapted communication strategies of the tourism sector and its economic and social importance.

Many supply-side stakeholders also used the pandemic-induced lockdowns for team-building activities and employee skills enhancement.

5 DISCUSSION

From the 2022 perspective, what we have learnt so far about the pandemic is that the most pessimistic forecasts about the large decrease of international arrivals were correct. Some of the origin markets like Asia will need a much longer time to bounce back to normality and in terms of tourism travels to Europe (and in this framework also to Ljubljana). The optimistic forecast of the Tourism Economics from 2020 that urban tourism will recover in 2021 has not materialised, however, in 2022 the prospects looked, and got empirically confirmed, as good. Most likely the forecast of the OECD from 2020 that urban destinations will fully recover by 2024 will actually become reality in two years time.

As far as our target Slovenian urban destinations are concerned, the data presented in the second section of this paper shows that Ljubljana and Maribor were hit in a different way. Before the pandemic, 95% of overnight stays in Ljubljana were generated by the foreign tourists (SURS, 2022a). Hence, Ljubljana lost big time. On the other hand, Maribor profited both by increased number of overnight stays due to the domestic tourists and voucher spending due to its tourism offer characterized by largely outdoor activities.

This is in line with the DuBois (2020) prediction that non-urban destinations and those city destinations with a higher share of domestic tourists, which applies to cities both in the USA as well as in Europe, will recover faster.

Our analysis of mid-2020 interview data shows that the tourism sector stakeholders did not have capacity, both in knowledge as well as human and financial resources, to adequately address the challenge of a pandemic. Furthermore, the cities and the sector were not digitally prepared to move the services, including tourism on-line, and offer digitally supported solutions, although the smart city concept has been rapidly entering the urban management in 21st century (Kunzmann, 2022). In this way, the pandemic has sped up innovation, both in the urban tourism and urban planning sectors. Citizens and tourists are now more inclined and skilled to use digitalised services.

At the institutional level, the situation is different. The pandemic has forced tourism suppliers to think out of the box and develop both products and campaigns that dive in greener directions and require less travel: for example travelling shorter distances, capitalising on the virtual tourism offer, develop hidden destinations and improve the management of the number and behaviour of tourists. While the crisis exposed the role of individual stakeholders and the lack of their co-operation in tourism management, it also revitalized the relationship between the government and tourism, or in other words, between the public and private sector. Although some of our interviewees recognised tourism as a strictly commercial activity, many highlighted the wider positive impacts of tourism on society and the environment and, consequently, greater responsibility the state should take in the management of the industry. Ambiguity in relationships and responsibilities is also reflected at local level, where on one side, local tourism organisations primarily act as promoters of the destination, but on the other, they are asked by the cities to manage tourism in a comprehensive manner for which they have no allocated resources. Cristiano and Gonella (2020) who discuss resilience and sustainable tourism development in Venice after the pandemic, also talk about systemic thinking. More precisely, only addressing the overtourism and tourism decrease issues in urban destinations is not enough. The quality of life in the city should be primarily secured for its inhabitants, and only secondarily for tourists. Therefore, an effective use of available urban resources should be considered in this framework

Governmental intervention analysis also indicates that national, regional and local authorities need to act in a more integrative manner and develop realistic measures in cooperation with supply-side tourism stakeholders (Marot et al., 2022). 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 of possibilities to survive a long-term pandemic-related dry patch. The pandemic has also confirmed that human capacities and governance approaches of the cities are only partially adapted to today's needs of urban management, including concepts such as resilience, smart cities etc., and that the cities vary great deal in regard to that.

6 CONCLUSION

In view of our research findings, we can conclude that while the need for comprehensive strategic management of tourism and application of newer urban management concepts such as smart city and sustainability has been recognised, this is not followed up with targeted actions in practice. The same goes for the concept of resilience, which calls 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 the stakeholders, and a better system of co-operation between stakeholders, including the ones from urban planning, should be put in place.

Furthermore, crisis management should acquire better recognition both in the urban and tourism management, and together with the measures find a place in urban and tourism strategies, instead of, as so far noted going back to “business as usual”, except for some exceptions or good practice tourist products and promotional campaigns. As for stimulation and promotion recovery, both top-down and bottom-up approaches are necessary, though the authorities at all levels (national, regional, and local) should understand the heterogeneity of supply-side tourism stakeholders and implement stimulating measures that target as many as possible and not just 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. Barandiaran et al. (2019) argue that Spanish tourism recovery after the economic crisis in 2008 was successful because the tourism sector took a leadership role in the economic recovery and applied a collaborative governance approach.

According to what we have learnt so far, the best preparation for tomorrow seems to be to develop strategic plans and responses for critical events like the pandemic and also to reconcile the tourism offer with the needs and expectations of local inhabitants. As pointed out by one of our interviewees, the tourism always manages to rejuvenate itself. The question that needs to be answered rather quickly is just to what extent do we want it rejuvenated (we certainly should not want to fall back into over-tourism) and in what manner.

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SO TURISTIČNE STRATEGIJE ODZIVNE NA KRITIČNE DOGODKE? ODZIV NA PANDEMIJO COVID-19 V SLOVENSKIH MESTNIH DESTINACIJAH LJUBLJANA IN MARIBOR

Povzetek

Zadnjih dvajset let je bilo ključnih za razvoj mestnega turizma tako v raziskovalni sferi (Ashworth, Page, 2011; Edwards, Griffin, Hayllar, 2008; Shoval, 2018) kot tudi v praksi. Fokus urbanih turistov se je premaknil od klasičnega, s kulturno ponudbo motiviranega turista k takšnim, ki jih zanimajo urbani življenjski slog, javni prostori, arhitektura in destinacijska atmosfera (Boivin, Tanguay, 2019; Fuller, Michel, 2014; Marot, Stubičar, 2022); zaznaven je tudi premik od primarnih evropskih mestnih destinacij, kot so London, Berlin ali Pariz, k sekundarnim, kot so Bologna, Ljubljana in Graz. Za boljše razumevanje tega fenomena so Šauer in sod. (2021) raziskovali srednjeevropske turistične tokove. Le-te spodbujajo različni dejavniki, od nizkocenovnih letalskih prevoznikov do delitvene ekonomije in skupnostnih namestitvev, ki so napravili mesta dosegljiva turistom kot nikoli poprej, kar je imelo za posledico tudi prenapolnjene in s turističnimi obiskovalci prenasočene mestne destinacije. Takšen razvoj je povzročil precej nejevolje in odpora med lokalnim prebivalstvom (Klepej, Stubičar, Marot, 2022; Martín Martín, Guaita Martinez, Salinas Fernandez, 2018; Milano, Novelli, Cheer, 2019; Novy, Colomb, 2019). Podoben razvoj je doživelo tudi glavno mesto Slovenije, Ljubljana (Horvat, 2019; Kuščer, Mihalič, 2019; Stubičar, 2022), ki se je ob intenzivni promociji diverzifikacije izvornih turističnih trgov znašlo na svetovnem turističnem zemljevidu z eno najbolj hitro rastočih stopenj rasti števila prihodov turistov v Srednji Evropi (+ 10 % in več letno). Drugo mesto, katerega odziv na pandemijo analiziramo v tem članku, tj. Maribor, je pred pandemijo uživalo relativno visoko, v absolutnih številkah pa nizko rast števila prihodov (Horvat, Stubičar, 2021; Horvat, 2022).

V času, ko je faza dozorevanja po Butlerjevem ciklu (Getz, 1992) še trajala, se je zgodila pandemija covida-19. Tako v Ljubljani (kjer je bil turizem močno integriran v lokalno gospodarsko in družbeno okolje) kot tudi v Mariboru (kjer je bila raven integracije nižja) je turizem praktično čez noč izginil; prazne mestne ulice so bile najboljši dokaz velikih prostorskih in družbenih učinkov tega sektorja gospodarstva.

Številni raziskovalci so se ukvarjali z različnimi vidiki in učinki pandemije v okviru urbanih turističnih destinacij: Liang in sod. (2021) so analizirali učinke in spremembe v počitniških najemih; Frago (2021) učinke in spremembe v trgovini na drobno; Pasquinelli in sod. (2021) znamenje mest v socialnih omrežjih in Kunzmann (2020) pametna mesta. Anguera-Torrell in sod. (2021) so izračunali poseben indeks poslovanja na področju urbanega turizma. Seraphin in Dosquet (2020) sta se ukvarjala s

problematiko urbanega eksodusa zaradi pandemije (število pariškega prebivalstva se je zmanjšalo za 10 %, saj so cele družine iz mesta zbežale v ruralne in gorske predele Francije, na svoje sekundarne domove). Enak vzorec so zaznali tudi švedski raziskovalci, kjer je zaradi eksodusa urbanega prebivalstva celo prišlo do motenj v kritični infrastrukturi in oskrbi (Åberg, Tondelli, 2021).

Zadnje kritično krizno obdobje podobnih razsežnosti je Slovenija na področju turizma doživela ob svoji osamosvojitvi v letu 1991. Upad števila prihodov tujih turistov je takrat beležila celo desetletje. Kriza zaradi pandemije, ki se je pričela le nekaj mesecev pred glavno turistično sezono v koledarskem letu 2020, je turistične ponudnike prisilila v velike in hitre modifikacije njihove ponudbe, vlade in odločevalce pa k intenzivnejšemu interveniranju v tem sicer predominantno tržno orientiranem sektorju gospodarstva (Fong in sod., 2021; Koh, 2020).

Ob tem je treba poudariti, da so različni avtorji (npr. Jones, Comfort, 2020; Yeoman, 2020) takoj pričeli opozarjati na dejstvo, da je mogoče krizne razmere prepoznati tudi kot priložnost za repozicioniranje turističnega sektorja; za obrat v smeri trajnostnega razvoja ob upoštevanju ukrepov kriznega managementa; za izboljšanje odpornosti mest na krizne šoke (to diskusijo so Dwyer in sod. v Ljubljani načeli že leta 2012). O tem, kako naj bi se odzivali mesto, urbana destinacija oziroma pristojni odločevalci, je bilo že veliko napisanega (glej npr. Degner, Leuffen, 2020; Rauws, 2017; Salet, 2006; Salet, Woltjer, 2009). Že pred pandemijo je izboljšanje odzivanja javnih akterjev in politik OECD (2018) izpostavil kot prioriteto v prihodnjem razvoju turizma, ne nazadnje tudi zaradi hitrega tehnološkega razvoja, ki je že pred pandemijo povzročal tektonske premike tako v splošnem kot še posebej v turističnem sektorju.

V tem prispevku naslavljamo vprašanje primernosti strategij mestnega turizma in odzivanja deležnikov na strani turistične ponudbe na epidemijo covida-19 v dveh slovenskih mestih: Ljubljani in Mariboru. Pri diskusiji upravljalških izzivov, vezanih na pandemijo, izhod iz nje ter sistematično pripravo na čas po njej, se opiramo na kategorizacijo, ki jo je razvila Sigala (2020).

V prispevku najprej na kratko prikažemo učinke pandemije na mestni turizem v Sloveniji, nato predstavimo uporabljeno kvalitativno raziskovalno metodologijo, rezultate delno strukturiranih intervjujev s ključnimi deležniki v obeh preučevanih mestih ter na njihovi osnovi pridobljena ključna spoznanja.

Kot je pokazalo dogajanje zadnjih dveh let, je med vsemi vrstami turizma mestni turizem na kratek in srednji rok najbolj občutljivejši na krizna dogajanja. Pandemija je v Sloveniji najbolj prizadela skupino mestnih občin, saj se je v njih turistični obisk najbolj zmanjšal. Med letoma 2019 in 2021 je število turistov v skupini mestnih občin upadlo za 59,7 % in število nočitev za 55,6 %, kar je bilo največje zmanjšanje med vsemi skupinami turističnih občin. Še večje zmanjšanje je zaznala Ljubljana, v kateri se je število turistov zmanjšalo za 63,2 %, število nočitev pa za 61,1 %. Glavni razlog za tolikšno zmanjšanje je velik izpad obiska tujih turistov.

Pred pandemijo je bila glavna značilnost mestnega turizma v najbolj obiskanih destinacijah njegova masovnost, ki je v diametralnem nasprotju z različnimi vidiki trajnosti. Med pandemijo se je izkazalo, da je večina obstoječih poslovnih modelov mestnega turizma (v tem kontekstu še posebej kongresnega in sejemskega turizma) netrajnostna in neprožna in da so kot takšni na dolgi rok (sploh v slovenskem kontekstu z zelo majhnim številom stalnih letalskih povezav s svetom) skoraj gotovo obsojeni na neuspeh. Za netrajnostne so se izkazali tudi ukrepi ekonomske politike, implementirani s ciljem dviga povpraševanja po turističnih proizvodih in storitvah – uspešni so bili v okviru morskih in zdraviliških destinacij, ne pa mestnih. Prav tako je analiza obstoječih strategij pokazala, da mesta niso pripravljena na krizne situacije in nimajo strategij, ki bi omogočile prilagodljivost na nenadne spremembe. Tako smo bili med pandemijo priča izgubi šolanega kadra, posameznikov s posebnimi spretnostmi, ponudnikov posebnih turističnih proizvodov in storitev. Kot so nam razkrili intervjuji s ponudniki, je kriza prinesla tudi nekatere pozitivne rešitve, med katerimi velja poudariti prenovu hotelskih zmogljivosti in infrastrukture, digitalizacijo (kulture) ponudbe, razmislek o prihodnji smeri razvoja turizma in povezanih dejavnosti.