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SPOT (860744) – Social and innovative Platform On cultural Tourism and its potential towards deepening Europeanisation

Deliverable 1.4a: Case study report, The City Municipality of Ljubljana, Slovenia, year 2020

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Project Partner: University of Ljubljana, Biotechnical Faculty, Department of Landscape Architecture

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Thank you note:
We thank everybody who dedicated some time and good will to fill in one of the questionnaires and has in this way contributed to the report as well.

Ljubljana, Slovenia, January 29th 2021

TABLE OF CONTENTS

FOREWORD

This report is a result of a half-year of work of our project team. It represents one of the deliverables of the WP1, dedicated to collect the data and documentation on cultural tourism. While the aim of the work package might sound very technical, it has included a lot of nuances. Firstly, it consisted of formulating the surveys which in the 15 partners' project team was quite challenging. The aim was to get the surveys ready so they correspond to different cultural backgrounds, differently experienced research teams in the surveying and, as this was not already enough, the pandemics took its toll on the whole process. As it is common in research, that we most likely cherish new challenges, among which we can certainly recognise COVID-19, in this case we have not found this challenge partially entertaining.

After almost one year of observing how the pandemic influenced the world in general, but the tourism sector, the subject of our research, in particular, the topic and the impact cannot simply be neglected. One of the first problems with the surveys we encountered was in what form we will be able to conduct the surveys, and even more importantly, are there going to be any tourists at all or not. As we experienced in some of the partners' countries, universities have forbidden the field work fully which disabled these partners to come through with the surveys. Secondly, the cultural offer of year 2020 was due to the cancellations of big events impoverished and in their judgement they needed to rely on their memories about the past events, cultural offers they enjoyed in. Thirdly, the tourism business sector, also one of our targeted groups in the surveys, has encountered a lot of turmoil in the past year. The accommodation providers were not in operation for at least half of the year, the culinary providers needed to adapt their offer to focus delivery as on-site dining was prohibited, which also forced some of the providers to seize down their operation. Cultural institutions like galleries and museum were also closed, however, they adapted their shows to the on-line ones, digitalised some of the offers, but as well cancelled exhibitions, concerts etc. In these conditions, we tried to carry out the survey in the best and most sensitive way possible.

With the tourists we focused on the field work and interviewed foreign and domestic tourists in different Ljubljana public space in the second half of August. Some of the domestic tourists we reached on-line. Due to the previous year experience – we did similar surveys focused on cultural tourism, both with the residents and tourists via another project – we interviewed residents only on-line, since for the field work we did not have the capacities. The businesses we only managed to motivate in the limited way, mostly due to the fact that we carried out survey in the period of the second lock down and it was difficult to even contact them.

Not to go too much into the details, the results presented in this report show a team effort to best illustrate the situation of the cultural tourism in Ljubljana in the summer of 2020. As introduction we have added a general description of Ljubljana, its tourism offer and statistics. Then, the individual reports of the surveys reflect different views and aspects of what is already well done and what could be improved in the future. In comparison to the previous studies, what is new, is the integration of the businesses as one of the target groups. While this might be a try at such of a study, there is certainly a need for a much deeper research on the tourism businesses in Ljubljana. These could be done from various points of view: economic, spatial, but as well social, as in what role these businesses (accommodation, service providers) have in contributing to the development of cultural tourism. The aspects of co-operation and integration and the need to enhance them were mentioned among the respondents. And with this note, we wish you a pleasant reading and to get back to us with the reflections on the findings.

SUMMARY

Survey with the tourists

For the survey with tourists we would like to highlight and summarise the following points:

Considering methodology of the survey, the questionnaire was carried out on several frequently visited locations by tourists, such as The City Museum of Ljubljana, Old town of Ljubljana, Prešeren and Kongres square. The sample method was random at selecting the respondents in the area of surveying. The sample of the survey consisted altogether 100 respondents, of which the majority respondents were foreign tourists visiting Ljubljana (74%).

The profile of the responding tourists shows the sample is equally distributed between females (53%) and males (45%), of which the age of almost half of the respondents is under 30 years old (43%). The respondents have various nationalities and residences. Prevailing are Germans (33%), Slovenians (23%) and French (17%). Considering education, a quite high frequency of respondents claimed to have spent 15 years (38%) or even more years (37%) for education and acquired Bachelor, Master's degree or even higher level of education. Thus, almost half (42%) of the respondents stated to be in the category of professionals when asked about their occupation. Amongst the respondents we have also identified students (16%), albeit this is not considered as a category of occupation. However, this also explains the total gross household income per year of the respondents, as almost half of the respondents stated to have a lower income, estimating to be between 10.000 EUR and 60.000 EUR (47%). According to the prior results of the profile of the respondents, it is also not surprising for a third of respondents (33%) to be living in a household with another person. Some are living alone (15%) or in a shared household/family of three (14%), or four (12%).

Travel characteristics of the respondents shows the prevailing type of travel to be as a pair (36%) or as a self-organizing group of friends (26%). Some have been visiting Ljubljana as a family (21%) as well. The average stay of tourists visiting Ljubljana seems to be 1,8 days and proves that Ljubljana is a city destination as most answers show the respondents visiting Ljubljana only as a daytrip (29%). Those who have stayed in Ljubljana overnight, stated to have been accommodated mainly in a hotel (23%), hostel (14%) or AirBnB (13%). The main motivation of the respondents visiting Ljubljana in August 2020 proved to be because of the architecture or townscape of the city (51%) and local traditions and culture (48%). Traditional categories of cultural offer, such as visiting museums and galleries, were a main motivation of only every fifth tourist visiting Ljubljana. This result confirms the change of notion from traditional cultural tourism to a more place-specific or place-based tourism.

Almost half of the respondents (41%) have visited other areas in Slovenia as well. The visited areas are popular tourists destinations, promoted either for its high natural or/and cultural qualities of the alpine mountain region (such as Bled, Bohinj, Triglav National Park and Bovec, Kobarid in the Soča Valley) or Adriatic coastline with its maritime towns and cities (such as Piran and Koper). A third of the respondents (34%) have visited other countries while en-route to Slovenia as well. These were mostly neighbouring countries, namely Italy, Croatia, Austria and Hungary. Almost half of the respondents (40%) spends between 40 EUR and 60 EUR per person per day. This is not surprising as the results of the average profile of the respondent shows a younger person at the start of their career and having main interest in the architecture and townscapes of Ljubljana, which is part of the open and public space and, unless it is part of a tour, it is free of charge.

Considering accessibility of Ljubljana, the respondents almost unanimously state that Ljubljana is quite easy or very easy to travel to and within the city. When asked about one's type of transportation used to travel to and within Ljubljana, the results show that the respondents used mainly their own transportation to travel to Ljubljana (53%) and were by foot when sightseeing the city (61%). Without a doubt these results reflect higher health precautions due to the Covid-19 virus. The respondents identify search engines as the most applied method of obtaining information about Ljubljana (71%), word-of-mouth (36%) and social media (24%). Interestingly, none of the respondents claim to obtain information about Ljubljana from travel agencies or other promotional prints, such as brochures and leaflets from tourist information centres and tourism fairs.

On general, the respondents have positive opinions about cultural tourism in Ljubljana. They are satisfied or very satisfied with the aspects of visiting Ljubljana, especially with the safety (68%) and visit as a whole (57%). Around one fifth (16-20%) of the respondents think that the number of cultural offers and their diversity is mediocre. The respondents are mostly intrigued by Ljubljana's townscapes, historical sites, heritage, restaurants and music events, less interested are by sport and dance events, religious sites, health sites and theatres (28% of tourists show no interest), assumingly due to the language barrier. Most of the respondents (88%) would recommend visiting Ljubljana to others. Some of the respondents (14%) recommend the following improvements to the cultural offer of Ljubljana:

_ more music events during weekdays and open air events;
_ more water activities, especially the availability to swim in Ljubljanica river;
_ better variety of cultural events and a more contemporary approach to cultural offer;
_ more quiet nature places;
_ better transport and service systems with more visible information signs at cultural sights;

Every fourth respondent claims that due to Corona effects on tourists visiting Ljubljana their visit has been affected very much (25%). In this open question, the respondents attributed the most obvious adaptation to the travel style to following higher health precautions, such as wearing masks, keeping minimal distance and avoiding crowded places (20 responses), visiting closer and safer countries and/or destinations (11 responses), to travel less (9 responses) and to use their own transportation, such as car, instead of a public one (9 responses). Out of 100 respondents, only 35 have already been to Ljubljana before, mainly in the last two years, from 2018 to 2020 (27 respondents). The results of satisfaction with earlier visit of Ljubljana in comparison with the most current visit does not deviate substantially (the respondents are mostly very satisfied with the safety aspect of Ljubljana), moreover, the prevailing responses show that the respondents believe there is no difference in their satisfaction in comparison to previous visits to Ljubljana.

As circumstances of the Covid-19 crisis has affected tourism sector as never before, one has to accept limitation of the surveys' results accordingly. Although for a short period of time in the summer months (during which the survey was conducted) many of tourism activities and cultural offers continued and in majority unaffected to some extent. However, not all cultural offer in Ljubljana was available like in 2019. Among such we can list music events, festivals and clubs, or other activities, locations and organized tours, which involve large crowds and indoor places without enough space to keep a minimal distance according to the regulations and restrictions of the Government of the Republic of Slovenia and the Ministry of Health.

Survey with the residents

Survey of residents has provided some interesting results regarding residents' attitude towards cultural tourism in the case study of the City of Ljubljana.

The analysis in the first part of report – basic information for profiles of the residents – showed the results that match the statistics at the national level. The ration between men and women is almost the same, with a slightly predominant share of females (51%). Regarding the age groups of the sample, the survey shows a higher share of inhabitants in the age groups of 30–40 years (20%), 40–50 years (19,7%) and 50–60 years (20%), which incorrectly represents age structure of population. Almost all residents were born in Slovenia, with exception of 2 persons, who were born in Russia and Cuba and 4 persons who did not provide us with an answer. As for education, more than 60% of respondents have completed at least 14 years of education or more, although it is interesting that almost a third of the respondents completed general high school which does not coincide with occupation. The later shows higher share of respondents in a field of professionals (31,8%), and almost a third of answers combined in a field of service and sales workers (8,7%), clerical support workers (8,7%), managers (8,2%), craft and related traders workers (2,4%) and technicians and associate professionals (2,4%). Employment structure, unlike education, coincides with the total gross household income per year, as almost 90% of respondents earn below 60.000 EUR. Regarding residence of respondents, postcodes were used as a tool for determining the distance between inhabitants. Most of the respondents live in a radius of 2 to 4 km (69,3%), and only 3 respondents live in a radius of more than 8 km (1%) from the city centre.

According to research results, cultural tourism is well received among residents of the case study Ljubljana. Despite mentioning generic names for cultural offer such as museums and galleries, Ljubljana festival, Ljubljana Castle, Drama and Opera and Ballet are among most frequently mentioned. These results are similar to the outcomes of the 2019 survey, where residents also highlighted generic names for cultural offer such as concerts, museums, theatre and more. Residents were more specific in ranking cultural offer by importance, and as important – very important, historical sites and buildings, cultural heritage sites, cultural routes, townscapes and music events were ranked, proving city's strong cultural and historical note. On the question of visiting the same cultural offer in Corona crisis, respondents mostly ranked it with 1 – I visit much less or 2 – I visit less, which reverses the order of cultural offer from question about its importance to residents. Film or theatre, dance events, music events and sport events are some of the categories that were visited much less during Corona crisis.

Residents generally cultivate a positive attitude towards cultural tourism. More than 50% of respondents is satisfied with the number of tourists and almost the same amount of persons will give tips to visitors regarding the cultural offer. At the same time, almost three quarters of them will very likely recommend visiting Ljubljana to others. Residents also believe that the impact of cultural tourism on the city is above all positive, resulting in a greater city promotion, enriched gastronomy, the revival of local traditions, employment opportunities, a richer general and cultural offer, an increased quality of life and the opportunity for social networking.

Among the negative impact, residents mentioned the lack of discounts as locals visiting cultural offer and inconveniences of increased tourism such as noise, crowded spaces, garbage disposal and increased conflicts between residents and visitors. However, these numbers were generally lower compared to the other responses we obtained.

Survey with the businesses

The survey of businesses in tourism and cultural sector of Ljubljana was highly marked by the Covid-19 pandemics, which forced us to conduct only the online version of the survey and has limited our outreach to businesses. Despite these circumstances, we managed to receive answers from 40 businesses, numerus of which slightly changed throughout the questions of the survey, also because some of the questions were aimed only at specific types of businesses (e.g. accommodation providers or tourist attractions). More importantly, we managed to reach a wide spectrum of target groups, ranging from accommodation providers, cultural and tourist attractions, tourist service provider to more specific business, such as an open-air culinary festival or concert and art venue. Unfortunately, however, only two respondents from restaurants, bars and cafes service are insufficient for any statistical analysis and do not reflect the scale and importance of this type of tourist service in Ljubljana.

Already the location of businesses points out on of the major problems of tourism, which is high concentration in the city centre, where vast majority of businesses operates. While most of businesses were private (especially accommodation providers), a quarter were in public sector (museums, galleries). In addition, we also recorded responds from NGOs and various clubs or associations. Only a smaller share of respondents is part of national or international chains, as these are not really present in the destination. Majority of business has also a long history, the oldest dating at the beginning of 19th century, and only a few respondents started the business in the last three years. Seasonally, contrary to the data that the summer is by far the busiest time of the year, businesses do not change the numbers of full-time employees much. Partly this can be connected to the un-flexibility of Slovene employment legislation. Almost all respondents evaluate the number of received visitors is high and that their performance trend in the last five year was positive or even very positive. However, none of them think the number of their visitors is too high, indicating capacities for further growth of tourism.

Among the accommodation providers majority represent hotels, though we also got responds from Airbnb providers and hostels. Most of them have over a hundred permanent beds and only two respondents have less than ten bed. This is also a reflection of a more difficult outreach to smaller providers, including Airbnb, and at the same time our will we reach the bigger players in the hospitality sector. However, all respondents are providing accommodation throughout the year and have the highest occupancy rates in the summer. While autumn and spring record roughly same occupancy rates, winter seem to be the least busy season for tourists visits to Ljubljana.

Among the visitor attractions, museums were the most represented, but closely followed by galleries, cultural heritage and entertainment sites. Families (and children) are their most important target groups, while adults are not important visitor segment. Additionally, students were pointed out several times. Tickets are in comparison to other same size EU cities of lower price, mostly between 5 to 10EUR for a daily ticket, yet mostly visitors do not spend plenty of time for the visit, only around 1 to 2 hours per site.

A wide range of cultural themes are offered by the surveyed business, as all themes but religion were presented and only a small share of them provide no cultural offer. History, artwork, heritage, architecture and gastronomy were the most represented cultural themes. When asked about the most important cultural theme they provide, heritage had clearly the highest share, followed by gastronomy, architecture and history. All but three themes (religion, literature and film) were represented, indicating a wide and diverse cultural offer of surveyed businesses. Businesses estimate that tourism in Ljubljana still has a lot of unutilised potential to further grow, develop new attraction and attract more visitors. Similarly, they evaluate that there is a certain level of cooperation between businesses in tourism sector in the area, they mostly participate in joint activities and lobbying, but still they see potential in more cooperation.

Foreign visitors, especially from EU, represent the most important segment of visitors for the surveyed businesses. Among domestic local visitors from Ljubljana and its urban region are still much more important that visitors from other parts of Slovenia. Most of their visitors represent individual tourists, couples, special interest tourist and families. Share of mass tourism and large groups is very low which could score differently if not for the pandemic, similarly also the share of eco tourists. Respondents estimate that their visitors want to experience local culture and traditions, and also ask them about recommendations for cultural attractions. However, they do not believe their visitors are prepared to spend extra in order to support the local economy.

To reach potential visitors, businesses use a wide range of promotional channels, though it seems that internet and word-of-mouth recommendations are the most important ones. Promotion and marketing are the tourism related activities respondents see as the most important for further development of tourism in Ljubljana. High share of respondents also wants to see more investments in events, information provision to tourists, new attractions and public transportation. In addition they suggested improvements in tourism destination management, decentralisation of tourist activities, cultural offer and public transport.

Covid-19 pandemic has impacted all surveyed businesses, especially with reduction of international visitors, cancelled events, cancelled or postponed booking and forced closures. Smallest, yet still strong, was the impact on recued numbers of domestic visitors. Businesses had to react to this challenge, to which they focused on maintain connections with their customers, focusing on digital services, new products and exploring new markets. Despite many changes in their employment policies (e.g. furlough, redirection to new positions, smaller hiring), only a third of businesses laid off some of their employees. This is also evident in the number of FTE which has not changed at all in over a half of the responding businesses. However, those business that laid off their employed, had to let go up to 80% of their workforce. Governmental assistance seems to have helped business a lot, as almost all of them received some sort of help (mostly financial assistance with furloughs) and majority of them estimate that they cannot survive such circumstances (without help) for more than three months. It is therefore crucial, that the sector receives the assistance needed to survive this troublesome period and can continue to further develop in the future.

AN INTRODUCTION TO LJUBLJANA AS THE CASE STUDY AREA

1. Historical development

The first forms of tourism (travel, pilgrimage) appeared throughout the history of Ljubljana, as the city served as the central settlement area inhabited for the Slovenes. In the 20th century, the emphasis of the city as tourism destination was on classical cultural tourism which encompassed visiting museums and cultural events. Also, traditionally for Slovenia, due to its small size, Ljubljana has always served as a one-day destination for domestic tourists. Ljubljana began with intensive and organised development of the urban tourism industry around year 2001 when Tourism Ljubljana, the public institute for the tourism promotion, was established. Their main tasks are support for tourism providers, destination promotion and management of tourism network of all stakeholders in the field of tourism. The Tourism Ljubljana has established two official tourist information points, where tourists obtain information on the tourist offer and products. Together with the Congress Office of Slovenia, they have paid special attention to the development of urban tourism, which is based on the promotion of urban way of life and urban public space as tourist attractions. The emphasis has been also in developing Ljubljana as a destination for congress and business tourism (MOL, 2020). Since they are aware of the concentration of tourists in the old city centre of Ljubljana, the institute has in recent years been trying to redirect visitors to other city districts. They are doing so by developing the offer in these city areas and providing alternative tours to show tourists a different Ljubljana. For this purpose, they have developed products that represents the greatest personalities in Ljubljana's history such as 'Brko Tura' and 'With bicycle through Plečnik's Ljubljana'.

Figure 1: The city centre of Ljubljana from the castle hill (author: David Klepej).

2. Geographical characteristics

Ljubljana lies in the Ljubljana Basin at an average altitude of 298m. It is a part of the Osrednjeslovenska region (one of the twelve Slovenian statistical and development regions), the crossroad of many important transportation routes and confluence of the Ljubljanica and Sava rivers. Altogether, 294,054 people lived in Ljubljana in the year 2020 which accounted for 14 percent of all Slovenian population. The share of youth population accounts for 14% (0–14 years) and the share of elderly 20% (65+ years) (SORS, 2020). The rate of unemployment is 9,3% (ZRSZ, 2020). As the rest of population in Slovenia, also in Ljubljana, the population is ageing which reflects in the average age of people and the life expectancy, currently at 78,7 for men and 84,5 for women (SORS, 2020c).

In addition to being the political centre of Slovenia, Ljubljana is also a national economic centre. Through activities such as pharmacy, food industry, banking, transport, construction, crafts and services, it contributes to the GDP of the Osrednjeslovenska region, which is by far the highest in Slovenia and amounts to 31,169 EUR per person in 2018 (Slovenian average: 22.083 EUR per person, SORS, 2020c). Especially in the last two decades, the trade and tourism industries have developed strongly. Currently, the tourism employs around 6.7% of all persons employed. The results of the development of the tourism sector show an almost constant growth not only in the number of tourists (doubled 2019/2014), but also in the number of overnight stays (doubled in last five years), expansion of tourist infrastructure and improvements in general services intended for residents and tourists.

Historically, Ljubljana still has visible traces and remains of prehistoric dwellings on Ljubljana marshes, also listed on UNESCO World Heritage list, Roman Emona, medieval parcelling and new directions of 19th and 20th century urbanism in the city plan. Its structure reflects both planned and unplanned urban fabric, primarily based on open public spaces and physical accessibility. Many parts of Ljubljana have been renovated and renovation of city's public spaces and traffic regulation has focused on more vulnerable road users, such as pedestrians and cyclists, with a greater emphasis on the use of public passenger transport. For this purpose, measures were taken, such as the expansion of the street levelling and closing areas for motor traffic in the very centre of the city (Slovenska cesta, Kongresni trg). Together with the renovated facades, the construction of new buildings and the installation of new urban equipment, the city offers spaces that can be used both by residents and visitors of Ljubljana.

3. Basic tourism statistics

In the last twenty years Ljubljana has put itself on the map as destination for short tourist travel of foreign tourists which register 95% of all overnights stays in the city. The overnight stays in 2019 reached peak with 2,22 million overnight stays; the arrivals accounted for 1.13 million tourists. The overnight stays doubled from 2014 (1,17 million) to 2019 (see Figure 2). The city is a so-called »short city break destination« but at the same time serves as well as starting point for visiting other main tourist attractions in Slovenia or, additionally, presents only a stop on the cross-Europe travel. Also, the share of Ljubljana tourist arrivals in the overall number for Slovenia increased from 15,9% in 2014 to 18,1% in 2019 (SORS, 2020a).

For the long-term period between 1995 and 2019 the average stay in Ljubljana was 1,8 to 2,0 days. A slight increase can be noticed in regards to the period before 1980, mostly due to the foreign tourists who on average stay 2 nights. Longer stays of 3 to 4 days can be reported for the foreign tourists from more distant EU countries, such as Malta, Finland, Israel, Island, while the tourists from neighbour countries and the Asian tourists stay on average for only 1,6 days (SORS, 2020a).

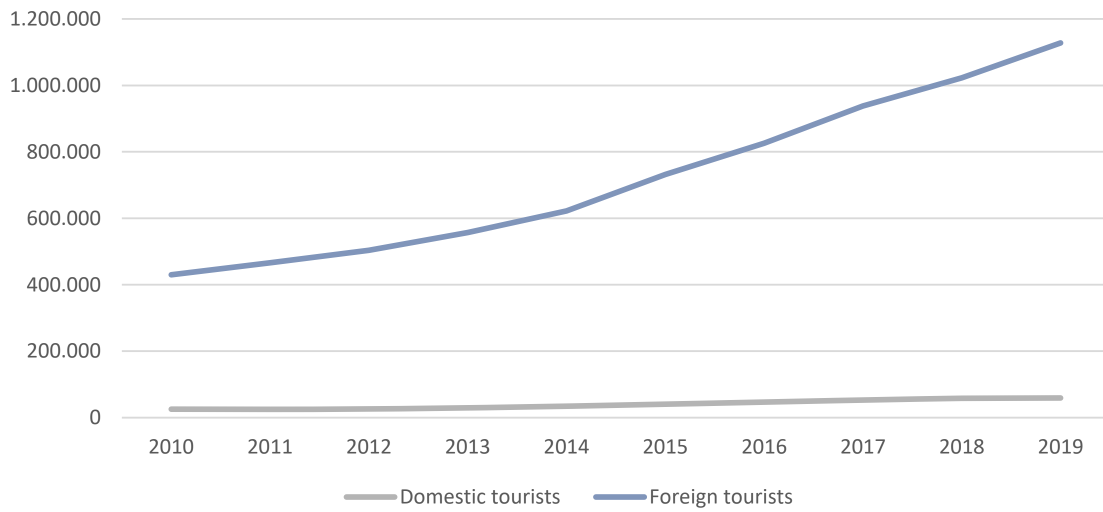

Figure 2: Increase of tourist arrivals between 2010 and 2019 (source: SORS, 2021).

In general, the main origin markets for Ljubljana in 2019 were: Italy (11%), Germany (9%), Other Asian countries (7%), USA (5%), UK (5 %), Austria (4%), followed by France (4%), Croatia (4%), China (4%) and Serbia (3%). It is necessary to say that other European countries, including Balkan ones, account for additional 12%. The categories for country of origin are 53 which tells us about the variety of the foreign tourists in Ljubljana.

Regarding seasonality, the peak of arrivals is certainly in the summer, however, we can see increase also in the months before and months after the summer. As you can see in the Figure 3, seasonality is very explicit for the foreign tourists, however, for domestic there is literally no seasonality to be observed. In addition, Ljubljana is known for its December Christmas market and events which is also visible in the number of visits.

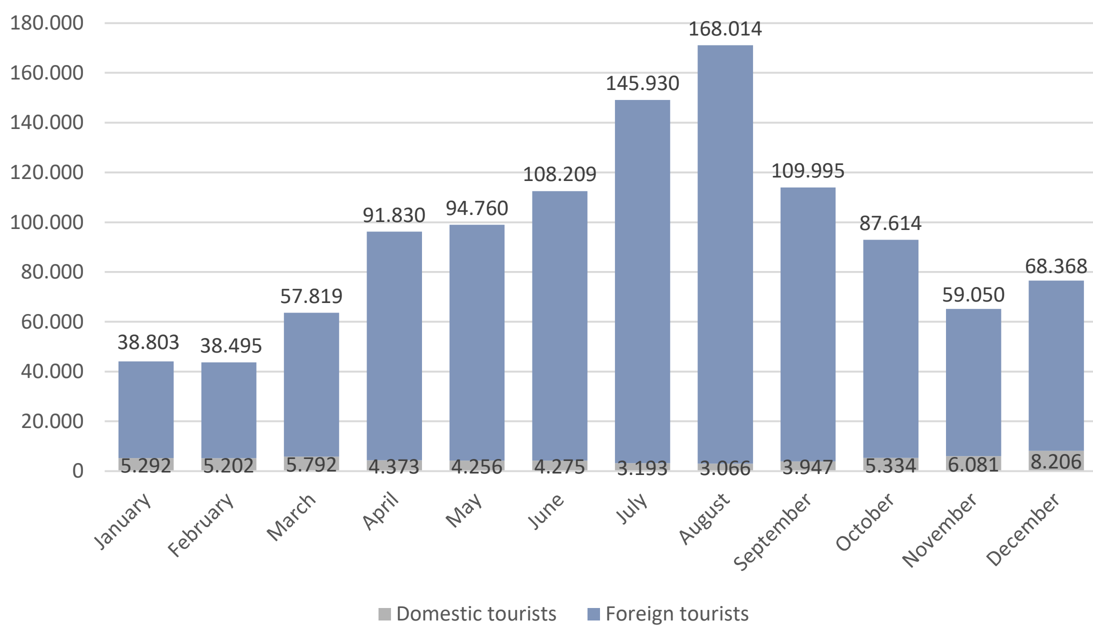

Figure 3: Seasonality of arrivals in year 2019, domestic vs. foreign tourists (source: SORS, 2021).

4. Tourist infrastructure

Tourist infrastructure planning in Ljubljana has started in the 1960s, but has lagged behind the growth of tourism in the last decade. From the mid-1960s to the end of the 1980s, the number of all tourist beds in Ljubljana increased from around 2.700 to around 4.500 beds. With intensive development in 1970s and 1980s, the share of beds in hotels and similar accommodation facilities increased to 60-70% (the number of these beds ranged between 1.900-2.400). In the crisis of the mid-1990s, when the number of tourist visits to Slovenia collapsed, the share of hotels and similar facilities even increased to 70-85%, as a significant part of supplementary accommodation facilities were closed (the number of all beds decreased to around 3.500 during this period).

The new millennium was followed by an intensive restructuring of the tourist infrastructure in Ljubljana and the modernization and development of hotel and non-hotel accommodation capacities. Thus, after year 2000, the number of tourist beds gradually increased from about 4.000 to about 6.200 in 2006, to 8.100 in 2010, to 10.000 in 2015 and eventually to 11.500 in 2017. The share of beds in hotels and similar facilities decreased to 50–60 % and has stabilized at around 55% in recent years. There were about 6000 beds in camps and about 4.7000 beds in other accommodation facilities. Unfortunately, more detailed data for the last period is not available due to the changed methodology.

The new SORS methodology from year 2018 also included beds in private rooms and apartments which are rented out through various online providers and shared economy (such as AirBnB), so the new data completely deviate from the previous ones and cannot be compared. In 2019, there were 18.274 tourist beds in Ljubljana (SORS, 2019) which include both, the official accommodation and the shared economy providers. The price of accommodation capacities changes in accordance with the tourist demand, the improvement of tourist offer and the general market conditions. Compared to previous years, when Ljubljana had a distinct summer season, the recent years brought the festive December due to festive decoration of the city and events, and at the same time the remaining months are filled on the basis of business tourism.

According to Trivago (2020) the average price of accommodation in Ljubljana in 2014, was 94 EUR, and the most expensive month was September, when the price of the accommodation was 106 EUR. The price was slightly lower in 2018 (93 EUR, only 9 months were taken into account), while the most expensive month was December, which with its price of 111 EUR exceeded the price from 2014. The average price of the accommodation in 2019 was the lowest, namely 83,5 EUR (Trivago took into account only 8 months), which was also reflected in the price of accommodation in the most expensive month of the same year, which amounted to 100 EUR. At the average price of overnight stays, Ljubljana is comparable to Berlin, Lisbon and Athens.

Table 1: The average accommodation price in years 2014, 2018, 2019 (source: Trivago, 2020).

Year	Average price (EUR)	The most expensive month	Basis for data calculation
2014	94	September, 106EUR	12 months
2018	93	December, 111 EUR	9 months
2019	83,5	September, 100 EUR	8 months

Tourist accommodation in Ljubljana also includes the possibility of staying overnight with private providers according to the principle of shared economy. In the last few years, the capacity of private accommodation offered through various online providers, such as AirBnb, FeWo, Hollidalettings and other, has greatly increased. In 2020, there were 1.664 such units in Ljubljana, of which 1.330 were larger residential units (apartments in residential buildings), 298 were private rooms, and additionally there were 36 common rooms. The average price for one night per unit is 70 EUR, the cheapest unit is rented for about 10 EUR and the most expensive for a little more than 700 EUR per day. As can be seen from Table 1, capacities are not necessarily available throughout the year, and their occupancy also varies. Occupancy and availability information is available on the AirDNA website for four time periods. Most units (64%) are occupied for up to 90 days, and most units (35%) are available for the maximum possible period.

Figure 4: Average monthly earning, occupancy and average prices, period August 2019 to June 2020 (source: AirDNA, 2020).

Spatially, the density of accommodation units decreases with the distance from the city centre. Most units are available directly in the old town centre along the Ljubljanica and Castle Hill. Outside the ring road, accommodation units occur mainly in the northern part of Ljubljana, i.e. Šiška, Šentvid, Bežigrad and the Posavje district. It is expected that COVID-19 will reduce the number of accommodation units, as quite a few owners have invested in apartments with the help of bank loans, which they can no longer repay due to the poor tourist season. The review of the units offered in June 2020 shows their reduction by at least a third, from 1.600 to 1.000 units.

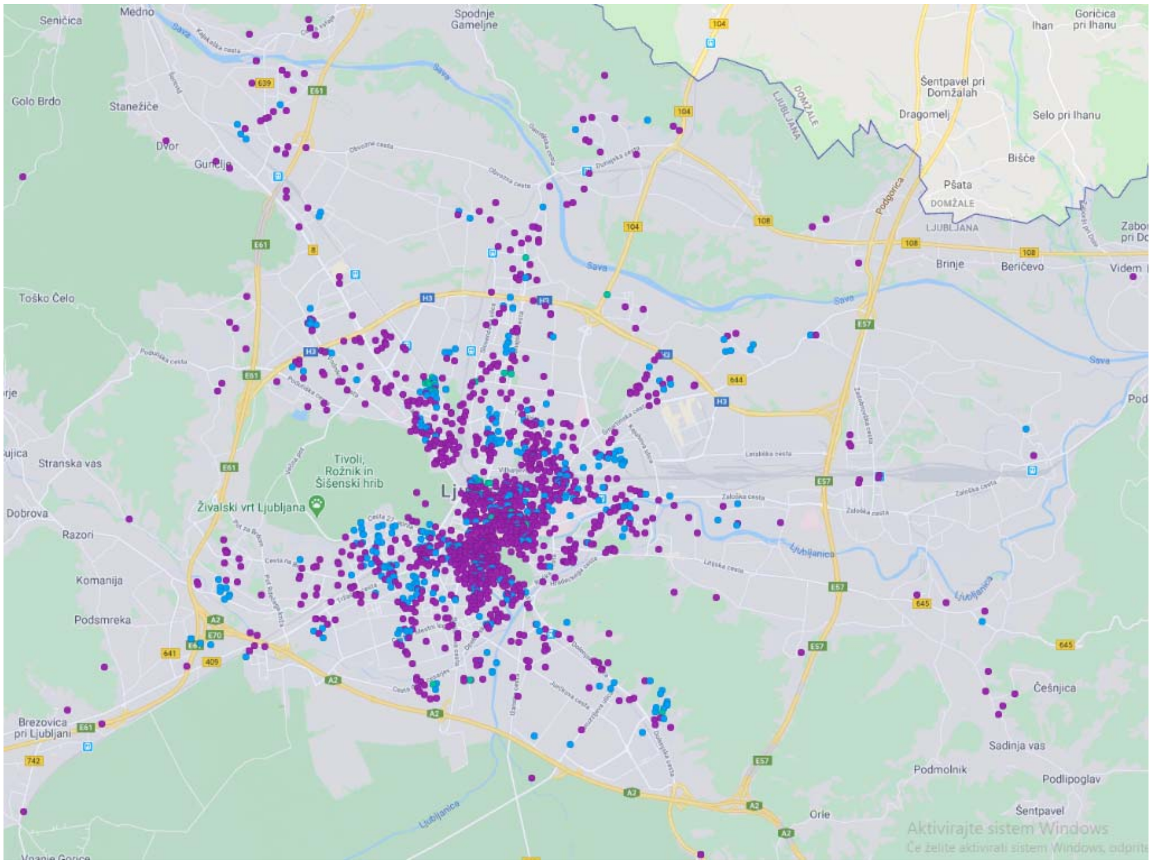

Figure 5: Accommodation units available via shared economy (source: AirDNA, 2020).

5. Development of tourism infrastructure

The tourism sector in Ljubljana is developing rapidly, which is reflected in new tourist products, new forms of offer and the construction, renovation and expansion of accommodation facilities, among which, hotel accommodation stands out (Tourism Ljubljana, 2020). Forecasts of investments in new accommodation facilities are currently quite some. Consequently, several construction and renovation projects took off before the pandemic and are planned to increase the hotel capacity of Ljubljana to 4,100 hotel rooms by 2023 (Tourism Ljubljana, 2021a). The increase in accommodation capacities is the result of economic interest, the annual increase in tourist visits and at the same time the unmet needs of congress tourism, as Ljubljana can currently only organize small to medium-sized conferences and congresses. Increasing tourist visit means better financial possibilities for the development of tourism, but at the same time it reflects increasing the price of rents for private and rental housing. This causes a change in the structure of tenants in the city and the migration of middle-class families or the population to the countryside. The new accommodation brings not only new rooms for tourist, but also an opportunity for residents with new catering and event spaces designed to hold various events and, in particular, according to many sources, major congresses.

Figure 6: Example of the hotel construction in the city centre (author: David Klepej, 2020).

6. Accessibility and mobility in the city

Ljubljana is the capital city of Slovenia which gives the city as well a role of the major transportation node. The international airport is located 20 minutes-ride North-West of the city in Zgornji Brnik. It is connected to the city via the bus services and several shuttle services (which were now heavily impacted because of pandemic). The major problem regarding the flight connection is the bankruptcy of the national carrier in October 2019 which significantly limited flight connection to and out of Slovenia. Currently, there are three connections running, namely, to Frankfurt, Istanbul and Belgrade. It is difficult to predict which lines will be re-established after pandemic is over. Ljubljana is also up to 2h away from other international airports, namely Venice, Graz, Trieste and Zagreb.

Not much better is the international train services: in normal operations there are three daily connection to Munich, two to Vienna, two to Zagreb, one to Belgrade. Flixbus was running several lines before pandemic (Vienna, Milan, Munich, etc.).

In Ljubljana public passenger transport consists of city and suburban buses of the Ljubljana Passenger Transport (LPP), intercity railway transport, the BicikeLJ bike sharing system (developed by JCDecaux) and Kavalir electric vehicle. Public buses connect all city districts and almost all surrounding towns. LPP services can be used by residents as well as visitors and tourist with the help of the Urbana card which can be recharged if necessary. Urbana costs 2 euro and 90 minute ride costs 1.30EUR. Tourists and visitors can buy it at the tourist information centres, and with it, they can pay a ride for several people. By purchasing the Ljubljana Tourist Card, tourists and visitors can take advantage of free rides of the LPP system, the Ljubljana tourist boat and the wooden Ljubljana tourist boat, the funicular to Ljubljana Castle and the circular train ride Urban (Visit Ljubljana, 2020). However, not many tourists use this service. Mostly, they explore the town on foot.

The tourist card is a product of the Ljubljana Tourist Board and serves as a help to visitors and tourists. The tourist card is intended primarily for the promotion of the tourist offer, such as cultural institutions, public transport and also to promote sights outside of Ljubljana. It includes a free visit to more than 20 sights, free transport by city buses, free guided city tours, free wireless internet access. The content of the tourist card changes and adapts annually according to the interest of tourist or the wishes of providers who want to communicate promotions in this way as well.

The tourist card duration varies from 24 hours to 72 hours and the price ranges are even adapted to younger tourists, defined by the age group between 6 and 14 years.

Table 2: Time of duration and prices of Ljubljana Tourist card.

Adults		**Children (6-14 years**	
Duration	**Price**	Duration	**Price**
24h	31EUR	**24h**	18EUR
48h	39EUR	**48h**	23EUR
72h	45EUR	**72h**	27EUR

For tourist, especially those in transfer, parking lots are also important, which are classified into four tariff classes according to the distance from the city centre. In addition to public company's car parks, there are quite a few private garages and car parks in the city. The city centre has streets equipped with short-term parking zones, parking prices are adjusted to the distance from the centre. The outskirts of the city offers P+R parking spaces As the Green Capital, Ljubljana especially encourages the use of bicycles and has thus created a bicycle rental system called BicikeLj. Tourist can rent bicycles for free by purchasing a Tourist Card. According to the data, there were 1.094.144 bicycles rentals in 2018 (MOL, 2019).

A greener form of transport, aimed primarily at a vulnerable social groups and tourists, is the Kavalir. The electric vehicle offers a free rode in the old town, where other forms of traffic are not allowed. The speed of the vehicle is low enough that tourist can stop it on the way, and two closed vehicles enable tourist rides even in the colder part of the year (Tourism Ljubljana, 2020).

7. Cultural tourism

The City of Ljubljana, as a tourist destination, has traditionally developed as the cultural centre of Slovenia, as it includes its national theatre, gallery and other important cultural institutions. In the 21st century, Ljubljana also attracts tourists as one of the European capitals, in which the Mediterranean and continental way of life intertwine and which at the same time represents a ''convenient'' stop to transfer route between the north, Central Europe and Mediterranean.

As a synonym for established types of tourism, we must first highlight urban tourism, a type of tourism conditioned by the type of settlement as a destination. The characteristics of urban tourism is that it takes place in an urban space and that tourists are equally interested in the way of life in the city as well as architectural, technological, social and natural experiences, and products intended for leisure, education or business (UNWTO, 2020). Through the term ''city break'', urban tourism is also mentioned as the main product for the Slovenian macro destination Osrednja Slovenija and Ljubljana, and the scenario of its development is described as ''culture and art, thousands of top street events, shopping and dynamic urban culinary scene, only a few steps away from nature with various activities and authentic rural offer (Vlada RS, 2017, str. 42).

Table 3: Major and secondary/support products for destination Central Slovenia and Ljubljana (Government of Republic of Slovenia, 2017, p. 42.

Primary products	Secondary/ support products
BUSINESS MEETINGS & EVENTS (year-round business tourism – business guests at conferences, meetings, motivational meetings and exhibitions, together with support events that attract multi-day guests)	_ Outdoor
	_ Shopping
	_ Special interests
CULTURE (city break, rich history, festival and events, contemporary and alternative art, city discovery)	_ Nature adventures
	_ Gambling
CIRCULAR TRAVEL (Ljubljana as a place to discover macro destinations and Slovenia)	_ Sport Tourism
GASTRONOMY (interplay of urban cuisine and cuisine in the countryside)	

Within urban tourism, we can define several types of tourism related to each type of offer. These are cultural, culinary, sports, business or congress and shopping tourism.

Cultural tourism is based on the history and culture of the visited place and in addition to the historical view of the city, such as sights, museums, archaeological sites, architecture, offers the opportunity to learn about modern art and current cultural trends. It this way, it attracts tourists and visitors who are not only interested in a holiday, but also in learning about a culture that is not theirs (Konakoglu, 2018). Cultural tourism in Ljubljana offers a cultural, historical and artistic experience, both to foreign and domestic tourists as well as to one-day visitors. The City of Ljubljana cooperates with three major public institutions (Museums and Galleries of the City of Ljubljana, Ljubljana Castle, International Centre of Graphic Arts), the Ministry of Culture and the Institute for the Protection of Cultural Heritage of Slovenia in formulating guidelines and preserving tangible, immovable and intangible cultural heritage. Together they take care of the entry of heritage to the register, coordinate maintenance and restoration work and when we talk about tourism, connect with the Public Institution Tourism Ljubljana (MOL, 2020).

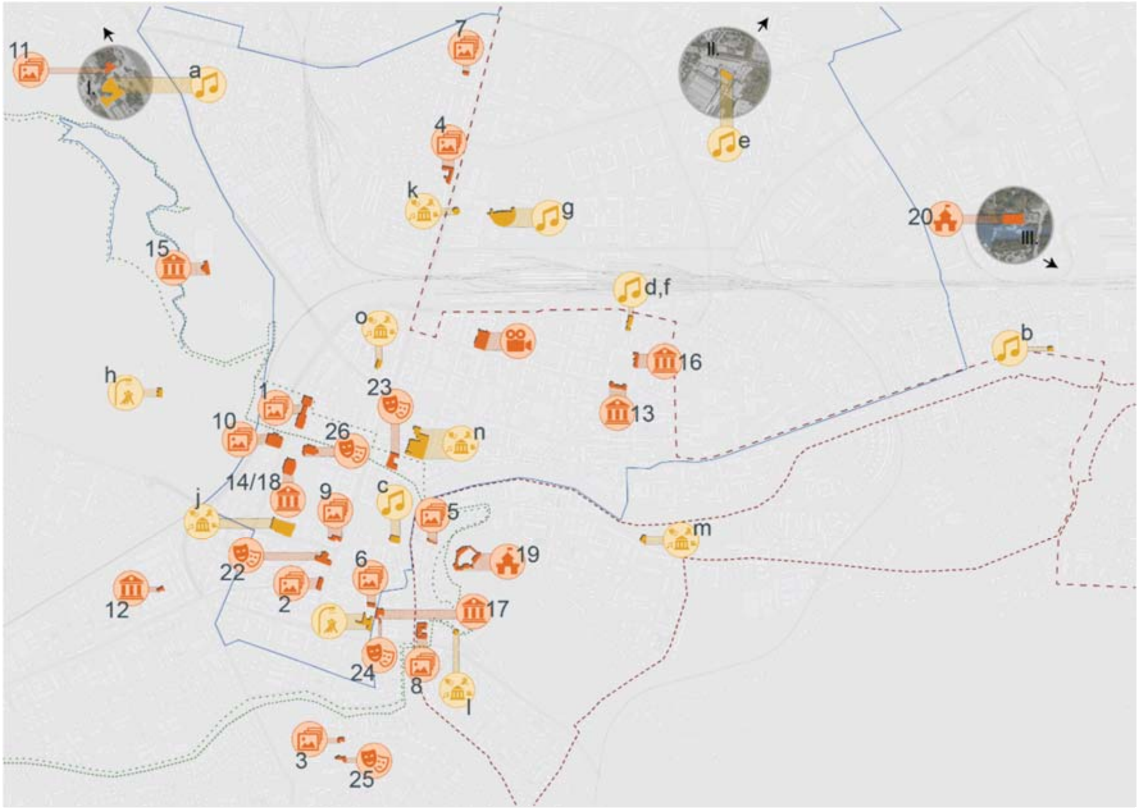

Figure 7: Locations of existing cultural offer in the city centre of Ljubljana (author: Nina Stubičar).

Cultural tourism, which is otherwise traditional type of tourism in Ljubljana, does not have globally known sights, so it is necessary to look for individual attractions that can be used to attract foreign tourists to cultural institutions. The Figure 7 implies concentration of the cultural offer in the city centre in which most of the museums, galleries, theaters and concert venues are located. As the survey by Marot at. Al. (2019) showed, the ratio between domestic and foreign visitors to cultural institutions is 7 to 3, thus in favour of domestic visitors. The fact that the cultural offer is not well known to foreign visitors was also confirmed by the promotional campaign of Tourism Ljubljana ''5 minutes to culture'', with which they started promoting the cultural offer last year.

Figure 8: Poster for the "Cultural walk" promotion action (source: TAM-TAM).

Ljubljana's tourist offer is being upgraded every year, new and innovative product and tours appear, e.g. in 2020 Ljubljana Castle has added a vineyard as one of their tourist products. With the increased number of foreign visitors, Ljubljana has also acquired the generic attractions that can be found in many European cities, such as the House of Illusion and the Escape room. To better promote the cultural offer, the main cultural providers in Ljubljana participate in the network and jointly design the promotion and approach to the marketing of the cultural offer. This year, they also introduced a single ticket for Ljubljana's museums, which costs 8 to 11 EUR per person or 16 EUR per family.

The Tourism Ljubjlana is currently preparing a project of cultural districts of Ljubljana as part of the development of sustainable tourism in the city, with which they want to improve the offer, which is focused not only on the city centre, but also in the outside. The project is being prepared in cooperation with the residents of the city districts and the creative sector. With this, they want to strengthen the quality of life of local residents and the arrival of tourist in an environment away from the strict city centre (Tourism Ljubljana, 2020). Also, due to the annually published public tenders for the events Tourism Ljubljana motivates local and other artists to create, refurbish the existing offer into new products which attract domestic and foreign tourists and local residents.

Figure 9a-h: Mosaic of cultural offer sights in Ljubljana (author: David Klepej, 2020).

SURVEY WITH THE TOURISTS

1. Methodology

Used method of sampling

The survey with the tourists was carried out in the field on August 14th and on August 26th in year 2020. The time periods of performing the questionnaire were 11am to 4pm and 10am to 9pm to cover in best way the time when the tourists were seeing the city. Three interviewers were performing the surveys on each of the field days. We selected several locations such as The City Museum of Ljubljana, Breg, Čevljarski most, Old town of Ljubljana, in front of the City Hall, the Tourist Information Centre, Ljubljana market, Prešeren and Kongres square as the most frequently visited by the tourists and thus also a good spots to attract the respondents. Most of the surveys (77 out of 100) we gathered on Prešeren square and at Ljubljana castle. The sample method was random picking the visitors in the areas of surveying. We found out that the public transport hubs, e.g. main railway station, were not good spots for surveying since the tourists due to the pandemic public transport only operated in the limited scope and most of the tourists travelled to Ljubljana by car. In addition, 23 survey were filled in on-line, predominantly by the domestic tourists. This sample was also random.

Figure 1: Map of the areas in which we interviewed tourists.

Introduction of the survey to target groups

Introduction of the survey to target groups was done solely in the field. We had prepared both, the on-line version of the questionnaire in the portal 1ka (University of Ljubljana own service for on-line surveys) and the printed version. In addition we offered as well a QR code to the tourists to scan and directly reach the survey. Hence, the tourists were offered to either fill in the printed/on-line questionnaire themselves or by the interviewer who was asking questions and noting down the answers. The ones who responded were offered a token of appreciation in the form of the postcards of Ljubljana (the promotional gift of the Department of Landscape Architecture) or the tickets for the free entry to the City Museum of Ljubljana. Most of the tourists selected the postcards which can imply that the tourists are not so much attracted by the offer of Ljubljana museums or the simply did not have enough time to include the visit into their stay.

Number of respondents per target group

Altogether, we gathered 100 surveys. The sample of the August 2020 arrivals represents 0,2% of all visitors to Ljubljana - 49,633 altogether, of which 42,400 were foreign tourists and 7,233 were domestic tourists (Statistical Office of the Republic of Slovenia, shorter SORS, 2021). The ratio between the foreign and domestic tourists in the sample is similarly in favour of foreign tourists (74%) as in the population (85%). If we examine the daily average of number of visitors – 1,600 and the fact we did the field work on two days, the percentage is higher and accounts for 3%. The sample is representative for the monthly number of visits only if we consider the 9.79% margin of error with the 95% confidence level. To gather the responses was not so difficult, the burdening factors on the days of the fieldwork were the heat and lower number of visitors in comparison to previous years. Thus, it happened as well that the interviewers met the same tourists multiple times a day.

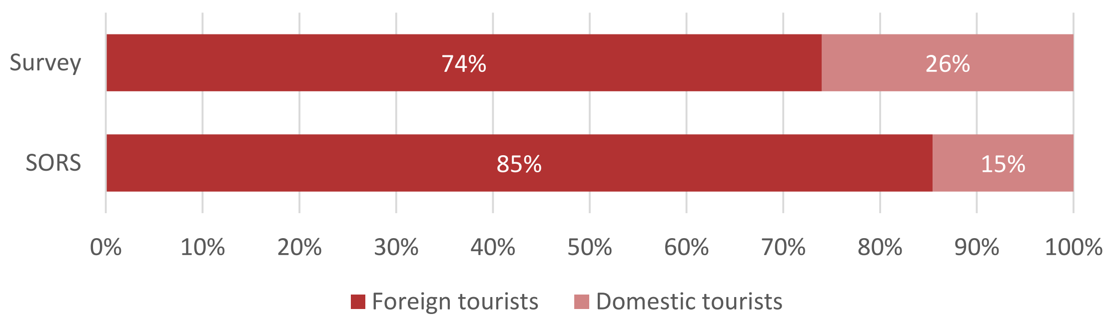

Figure 2: Ratio of foreign and domestic tourists visiting Ljubljana in the survey in comparison to the arrivals in August 2020 as measured by the Statistical Office of the Republic Slovenia (SORS, 2021).

For the purpose of comparison analysis (see the deliverable 1.4) we reported 40 as was agreed among the project partners, however, in this report we present results for the whole sample. For the reporting we have selected each second case in the sample and then evaluated it in regards to the percentage of the filled in questions, so that we came to the number of 40.

For this report we need to add a short disclaimer to the reporting of the results. Since our numerous is 100 we decided not to put both, the absolute value and the percentage in the charts since the numbers are the same. We selected either one or another, depending on the context. Furthermore, if applicable, we have compared the results with the previous surveys performed with the same purpose. One was performed by the Statistical Office of the Republic of Slovenia in year 2019 (more info) and one was done by the Department also in 2019 (Marot et al., 2019).

2. Results of the surveys for tourists

I Profiles of tourists – basic information

1. Gender

The total number of tourists participating in the survey is 100, out of which 53 are females and 45 males, so gender-wise the sample is equally distributed. Only two of the respondents identify themselves as other or have not stated their gender.

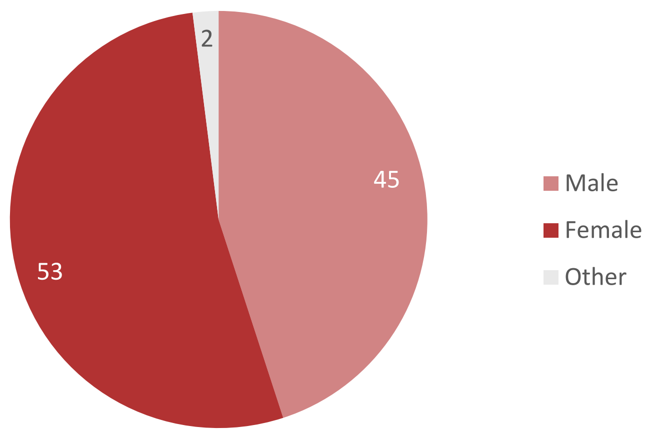

Figure 3: Gender distribution of the tourists (N=100).

2. Age

The total number of tourists participating in the survey is 100, almost half of the respondents are considered as young tourist by being in the age group under 30 years old (48%). The youth is followed by 31% of respondents from age group 30-40 years old. 12 respondents or 12% of the quota, are aged from 40 to 50 years old. We got only 3 respondents we can classify as senior tourists. For one respondent we have no data on the age.

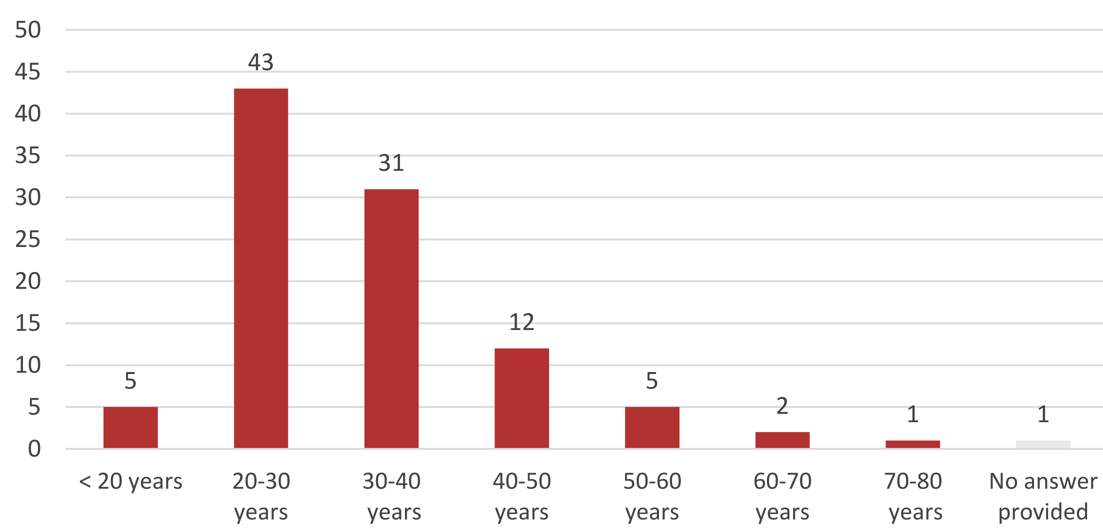

Figure 4: Age distribution of the tourists (N=100).

3. Country of residence and other countries

The total number of respondents is 100, out of which 26 were born in Slovenia and have a residence in Slovenia as well. These 26 tourists can be thus considered as domestic tourists. For the foreign tourists prevailing countries of residence are Germany (32), France (17), followed by a few tourists from the Netherlands (4) and Italy (4). Tourists from Austria, Croatia and Hungary represent the category Others (4 respondents). In comparison to the previous years for which in Ljubljana we were able to note the increase of tourists from Asian countries of origin, USA and Canada, the recent turn as result of pandemic shows the refocus again on the European market.

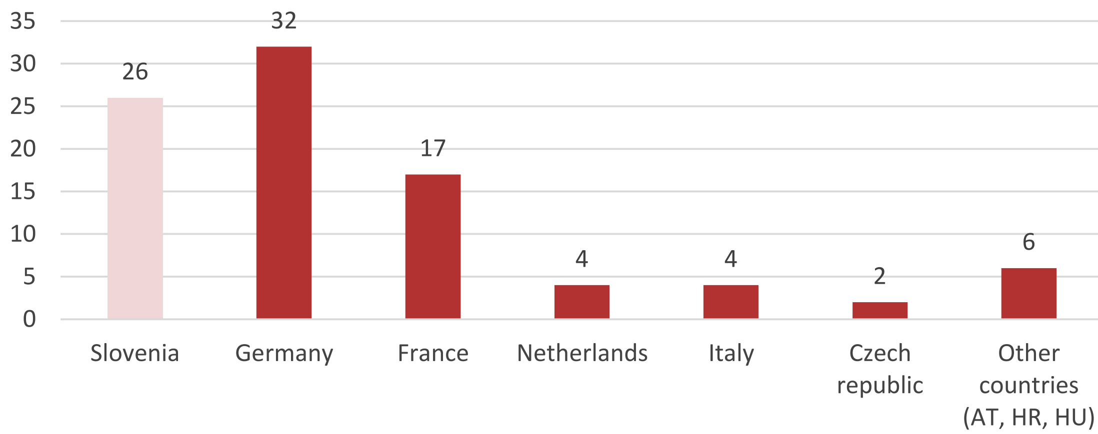

Figure 5: Tourists according to their country of residence (N=100).

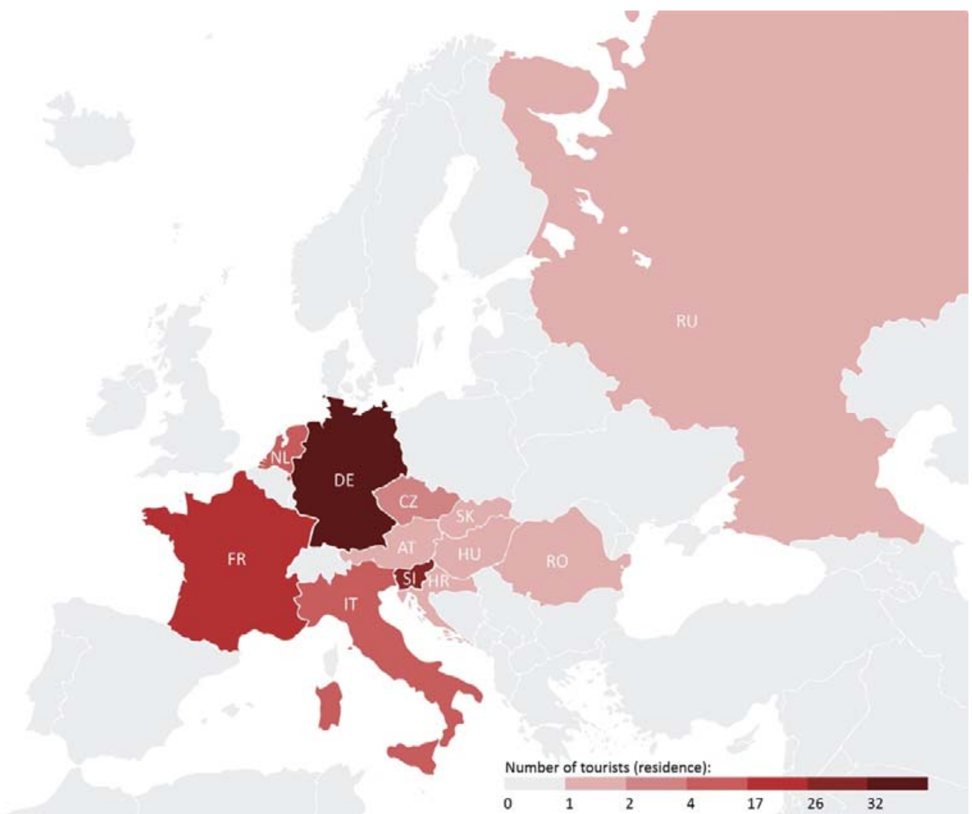

Figure 6: Map of countries of residence of tourists. The values on the scale resemble numbers acquired in the survey.

4. Country of birth and other countries

The total number of respondents is 100, out of which 23 were born in Slovenia. 33 respondents claim Germany as their country of birth. 17 are French and some were born in United Kingdom (4), Netherlands (4) and Italy (4). In the category of other multiple countries can be named including Czech republic (3), Austria (1), Croatia (1), Hungary (1), Pakistan (1), Romania (1), Slovakia (1), Spain (1) and Switzerland (1). As for the country of birth, we can comment that due to the pandemic Ljubljana lost the international – out of Europe – tourists for whom they have put a lot of promotional effort to attract them in the last five years. Due to the closure or limitations of the flight travel and the expansion of the pandemic, the tourist market is shrunk again to the European one.

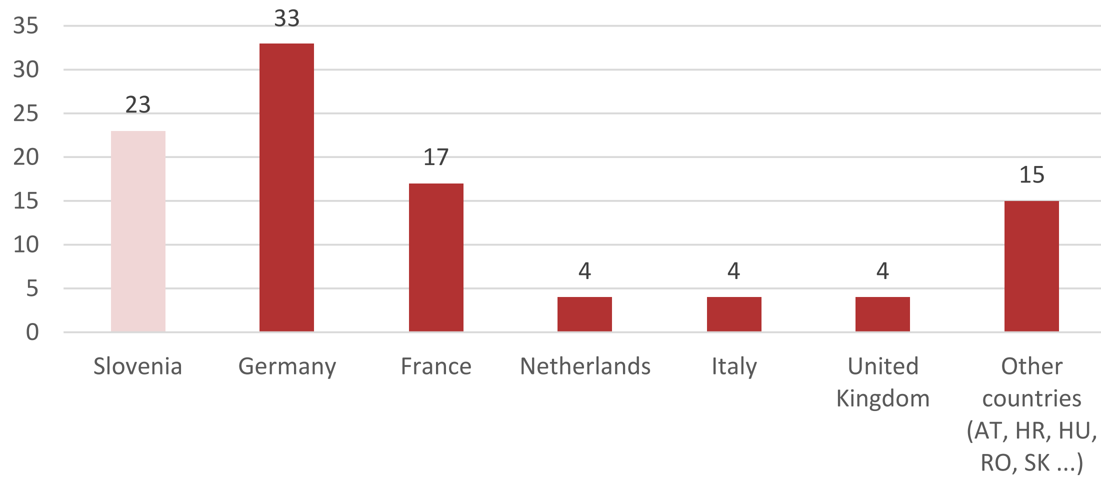

Figure 7: Country of residence of tourists visiting Ljubljana (N=100).

5. Education

The total number of responses is 100. Since calculating the sum of the education period is not common in Slovenia and could be stressful for tourists, we offered them categories of level of education and then calculated them back to years. How we did this, is explained in the footnote[1]. 21 tourists have finished at least high school. 10 of those visited technical high school and 10 of them general high school. Nobody was schooled 10 or 13 years, so we omitted these two numbers from the charts. 38 tourists report to have spent 15 years for education meaning that they acquired at least Bachelor diploma and 37 reports to have spent even 16 or more years for education and acquired Master's degree or even higher level of education. One tourist did not submit years of education.

[1] The calculated years of education are classified in the following way: 5 years = none completed (at the class 5 most of the pupils who do not finish grammar school usually fall out), 8 years =primary school, 11 years = technical high school, 12 years = general high school, 14 years = technical diploma, 15 years = bachelor's degree, 18 years = master's degree, 22 years = doctorate degree.

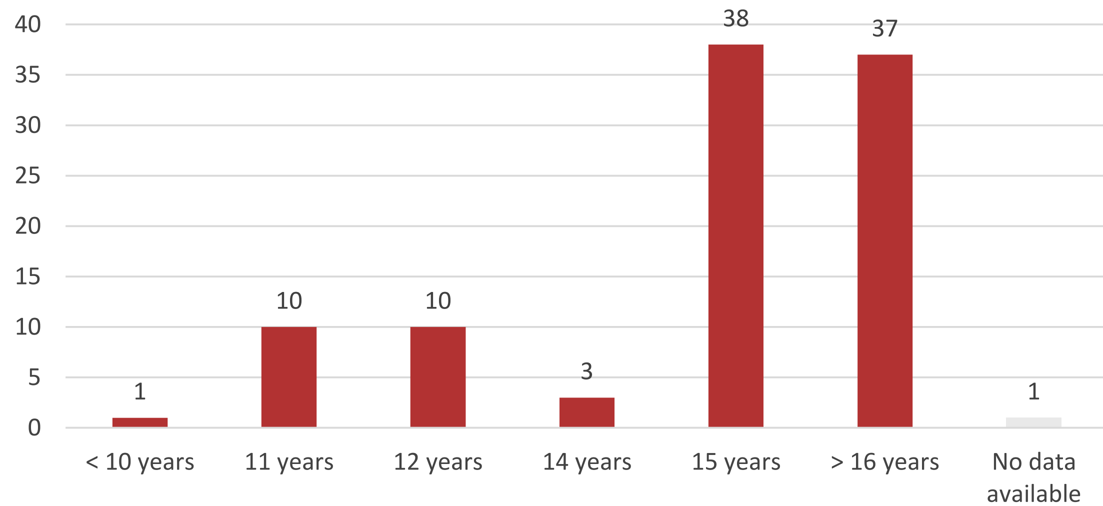

Figure 8: Education of tourists visiting Ljubljana (N=100).

6. Occupation

The total number of respondents is 100, out of which 42 are in the category of professionals. 7 are technicians and associate professionals. Respondents stated to be also managers (2), clerical support workers (2), service and sales workers (2) and craft or related trades' workers (2). For 25 cases there is no data available. Interestingly, the third prevailing answer is student (16), however that is not a category of occupation. Two respondents also state to be retired or unemployed.

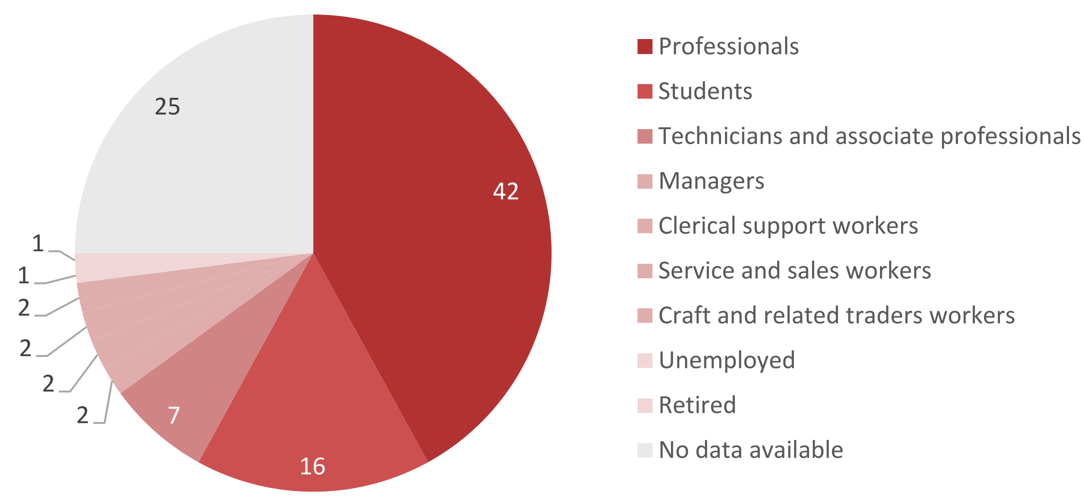

Figure 9: Occupation of the tourists visiting Ljubljana (N=100).

7. The total gross household income per year

The total number of respondents is 100. Almost a quarter of respondents (22%) stated to have between 20,000 EUR to 40,000 EUR of total gross household income per year, 13% between 40.000 EUR and 60.000 EUR and 12 between 10.000 EUR and 20.000 EUR of total gross household income per year. We could summarise that tourists coming to Ljubljana as average earners. Given the fact, the majority of the respondents have a higher educational degree and thus should take soundly paid jobs. However, if one compares these results to the age of the respondents, we can argue the average respondent is at a beginning of his/her career and thus have a smaller income for now. In addition, it might be that majority of youth live in one-person households (according to the answer on the household structure 15 altogether), thus the lower average. 17 of the respondents did not provide us with the data on their annual household income. 7 respondents can be classified as higher social class tourists since they earn more than 120,000 EUR per year.

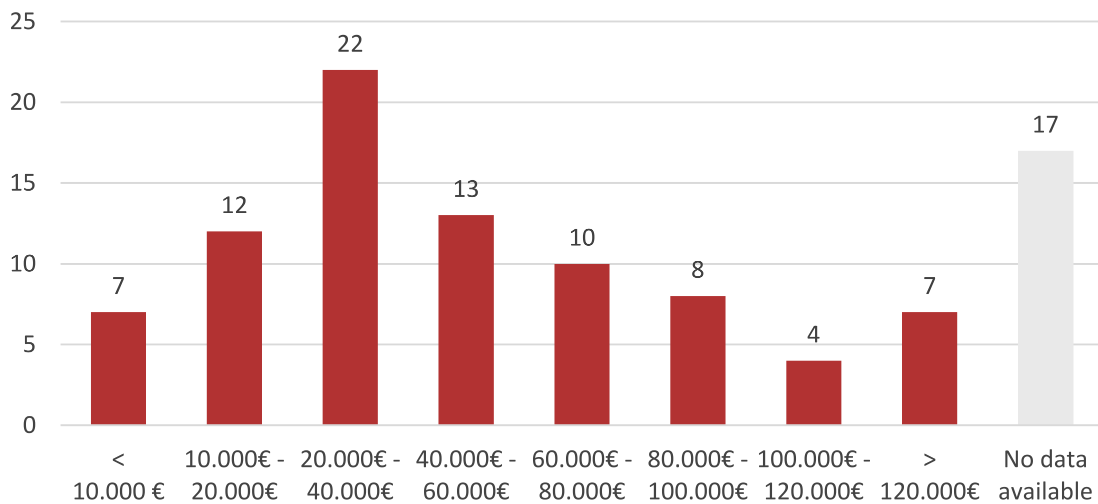

Figure 10: Total gross household income per year of a tourist visiting Ljubljana (N=100).

8. Household composition

The total number of respondents is 100, out of which one third of respondents live in a household with another person (33). 15 reports to live alone and 14 reports to live in a family of three people or in a shared household. 12 respondents live in a household of four people and 15 respondents declare to have a household with 5 and more persons. 11 respondents did not wish to answer this question.

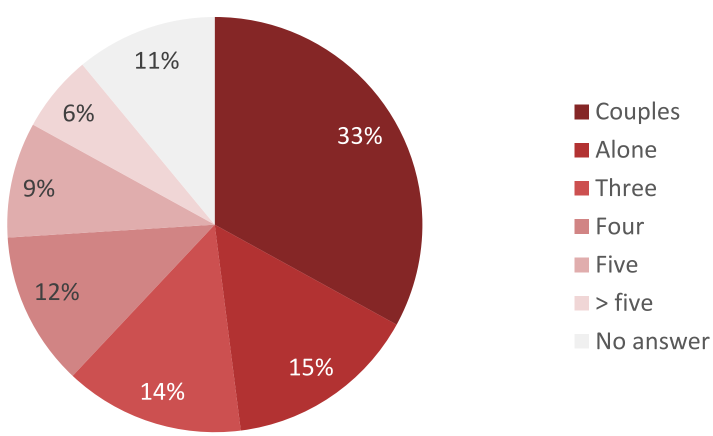

Figure 11: Household composition of tourists visiting Ljubljana (N=100).

II Travel characteristics

9. Tour group

The total number of respondents is 100, out of which more than a third is travelling in the pair of two persons (36), 26 are travelling in a self-organised group, mostly consisting of friends, 21 respondents are travelling with their family and 14 are travelling alone. Two respondents did not answer. In comparison to the previous year, similar results can be seen. In 2019, 40% of respondents stated they were traveling in the pair of two persons, little less were tourists traveling in self-organized groups (18%), 14% were traveling alone and there were more travels for business purposes (6%).

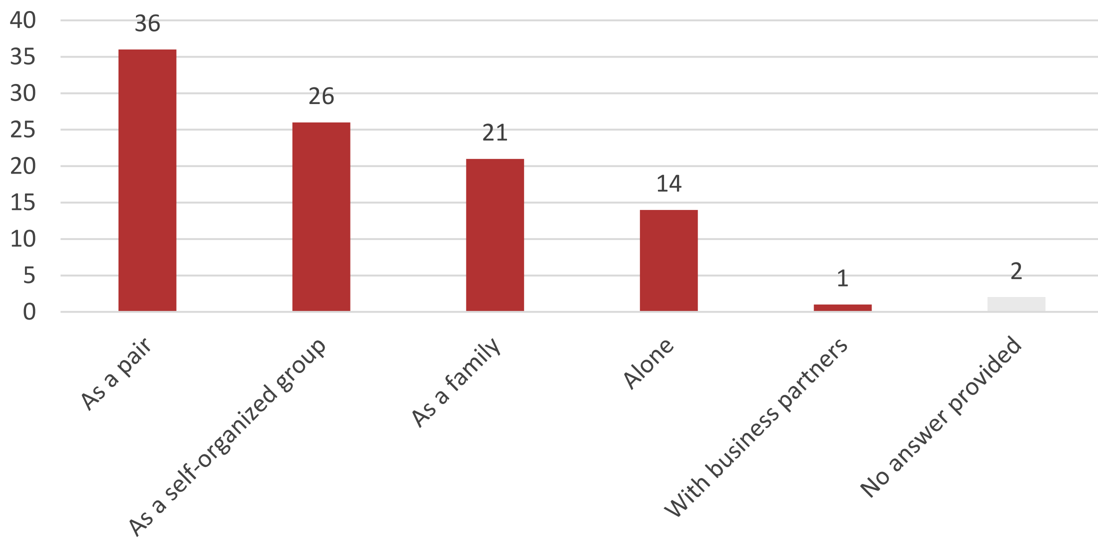

Figure 12: Type of travel for tourists visiting Ljubljana (N=100).

10. Motivations to visit the area

All 100 respondents answered this question. More than half of the visitors claim their motivation to visit Ljubljana is the architecture or townscape of the city (51%) which confirms the change of notion from the classical cultural tourism to the place-based tourism. The architecture is followed by local traditions and culture (48%) and landscape or nature of the city and municipality (36%). The least represented motivation of the offered answers is a religious purpose (less than 1%). Other reasons for visiting Ljubljana, the respondents state is to visit a friend or relative (VFR – visiting friends and relatives' tourism) or to go shopping (5%; shopping tourism). Traditional categories like visiting museums, festivals are featured were the reason to come only for one fifth of tourism. On one side this illustrates the shift in the types of tourism prevailing in urban tourism, on the other this can also confirm the fact that Ljubljana has no globally attractive museums or festival offer which was proven in another study (Marot et al., 2019). In addition, results have shown that the visitors of museums are predominantly domestic tourists, the ratio is 7 to 3, thus the city has been trying to promote better the traditional cultural offer via the promotional campaigns, such as "Five minutes to the culture".

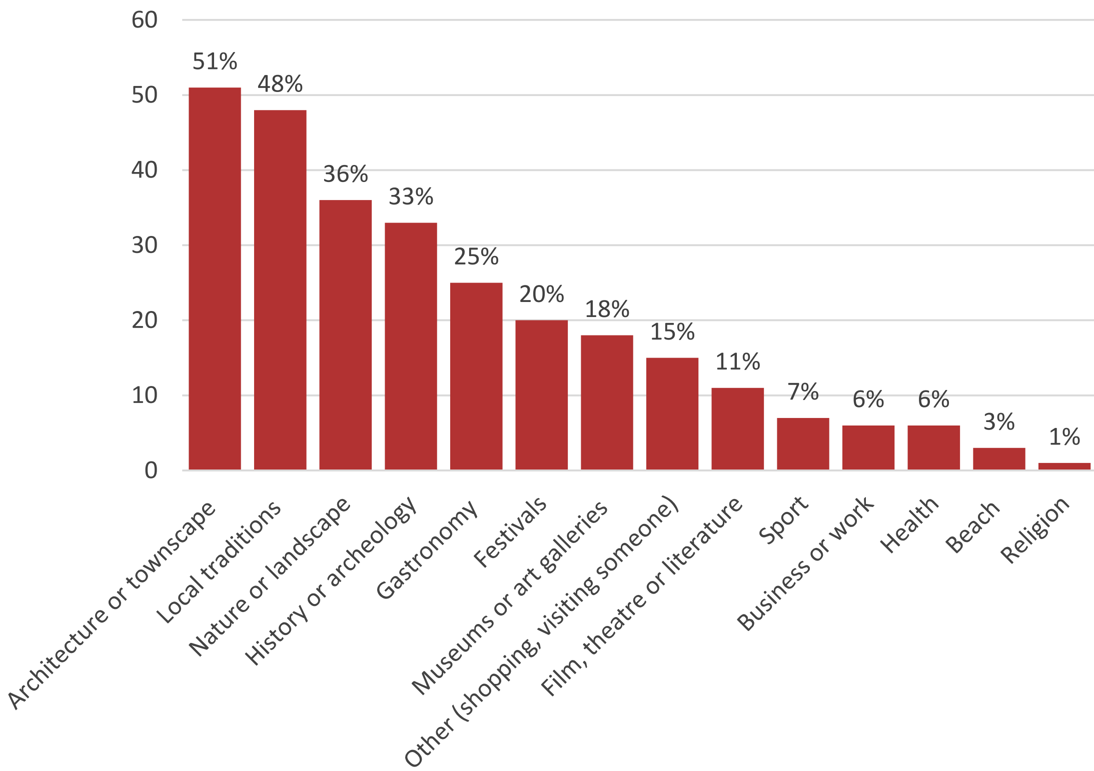

Figure 13: Motivations of tourists to visit Ljubljana (N=100).

11. Daytrips or overnight stays

The total number of respondents is 100. 29 respondents stated to have visited Ljubljana only for a daytrip. Another 25 have spent two nights in Ljubljana whereas 19 respondents claimed to have stayed overnight in Ljubljana for three nights, so the average stay of tourists in Ljubljana is 1,8 days. This confirms that Ljubljana as destination can be classified as the city break destination. Only 7 respondents said to have stayed overnight in Ljubljana for more than 5 days, 2 respondents did not provide answer.

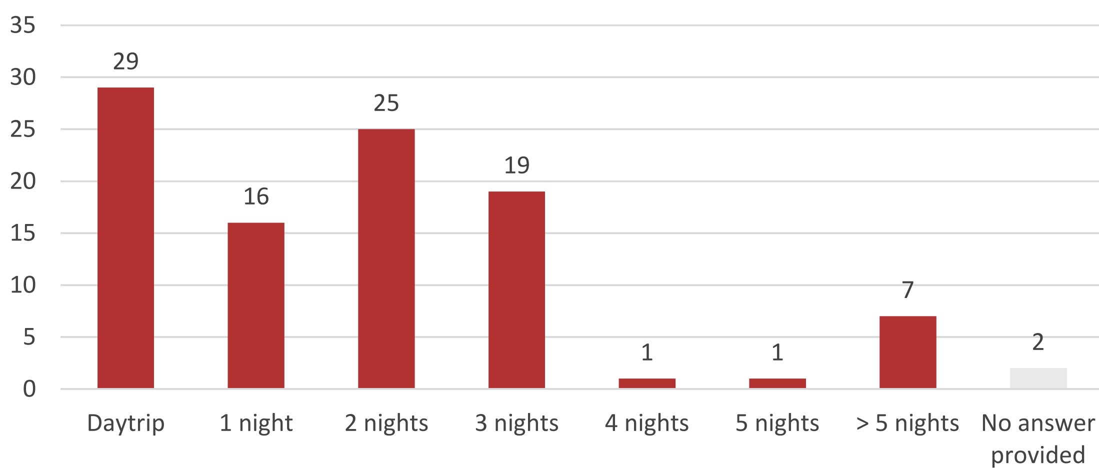

Figure 14: Daytrips and overnight stays of tourists visiting Ljubljana (N=100).

12. Use of accommodation

The total number of collected responses is 70 since 29 came for the daytrip and one has not provided the answer. 23 out of 70 (33%) respondents stay in a hotel while visiting Ljubljana. Another 14 (20%) respondents stay in a hostel, whereas 13 (19%) of the respondents selected an Airbnb accommodation. 10 out of 70 tourists have stayed with friend or relatives and have not used a tourist supplier of accommodation. Only one respondent is staying in a camp and none of the respondents are staying on a farm or mountain cottage which is due to the fact that Ljubljana is a city destination.

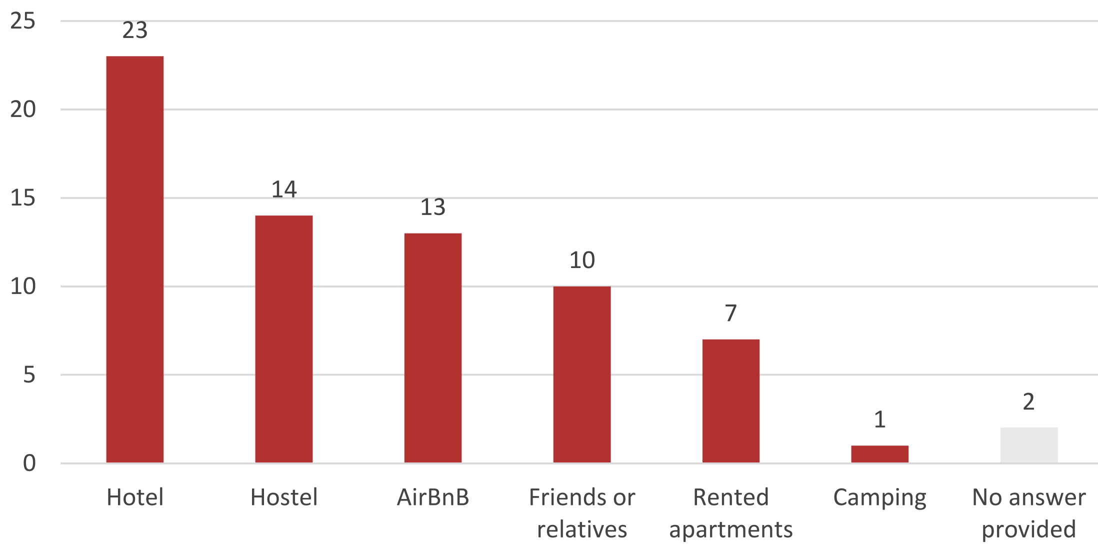

Figure 15: Type of accommodation used by tourists visiting Ljubljana (N=70).

13. Combining visit to other areas

Out of 100 respondents, 41 respondents also visit other sites and regions besides Ljubljana, however, 28 respondents did not provide answers. Among the areas visited, were the most popular Slovenian destinations such as Bled (8 visits), Piran on the Adriatic coast (4 visits), places in the Alps such as Triglav National Park (2 visits), Bovec (2 visits) and others: Bohinj (1 visit), Kobarid (1 visit), Koper (1 visit), Slovenian coast (1 visit), Soča valley (1 visit) and Maribor (1 visit). Altogether tourists made 81 daytrips to other areas.

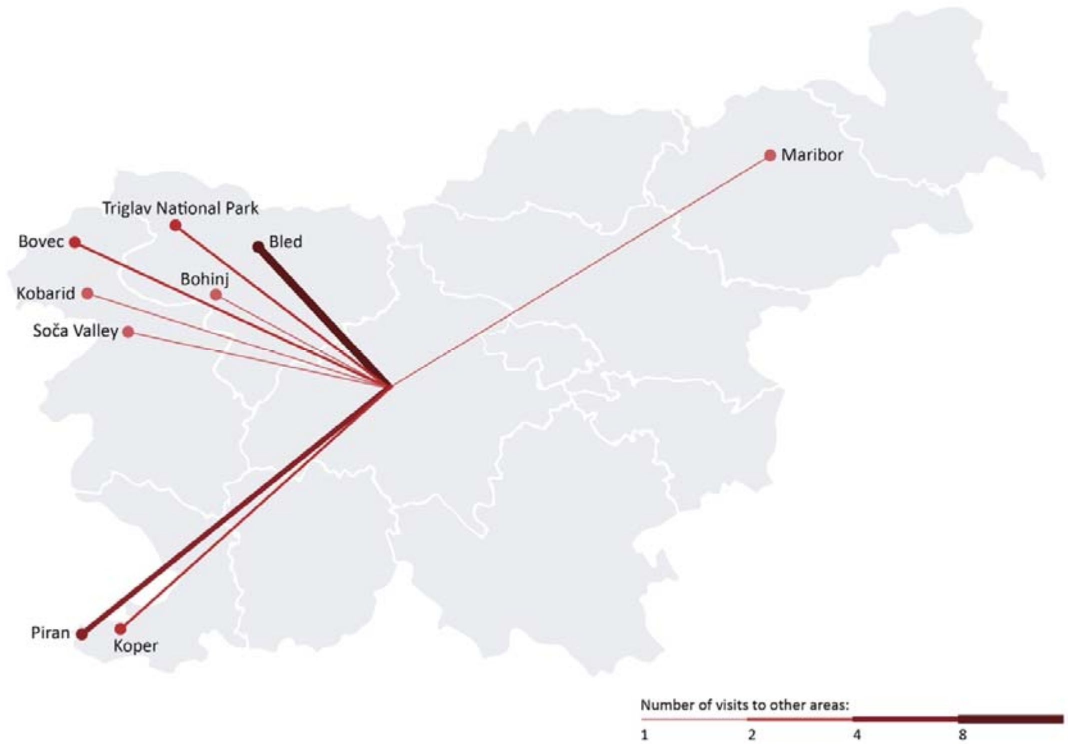

Figure 16: Number of respondents who have visited other destinations in Slovenia besides Ljubljana (N=13).

14. Combining visit to other countries

Out of 100 respondents, 34 respondents also visit other countries while en-route to Slovenia. The most prevailing visited countries are the countries which share borders with Slovenia, such as Italy (19 visits), Croatia (13 visits), Austria (9 visits) and Hungary (8 visits). Countries such as Poland or Belgium indicate that this person is making a cross-Europe trip which is not limited to one macroregion, e.g. Alpine or Central Europe. Altogether respondents made 69 trips to other countries.

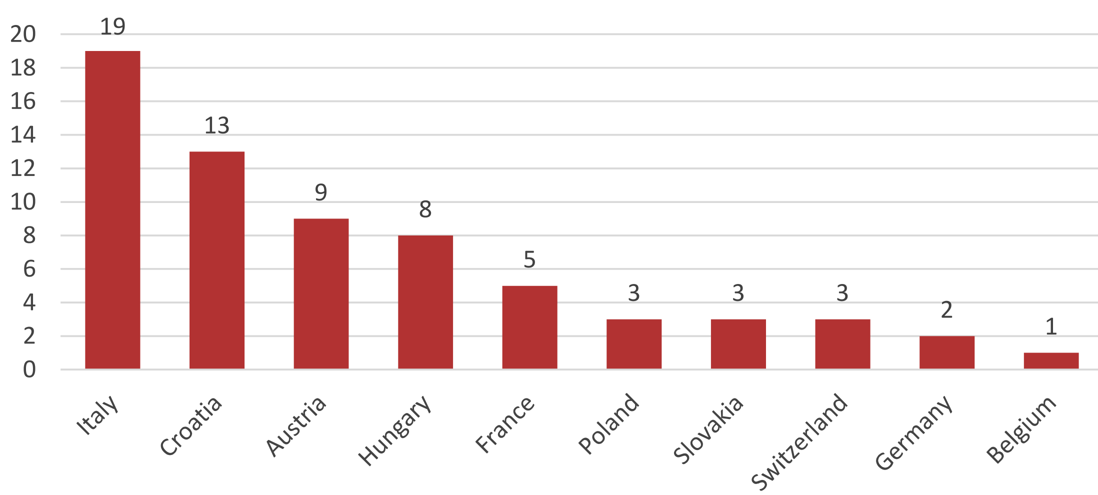

Figure 17: Frequency of visits to other countries (N=34).

16 respondents visited more than just Slovenia, 7 state to have visited more than 3 countries while en-route and 6 have visited 2 more countries.

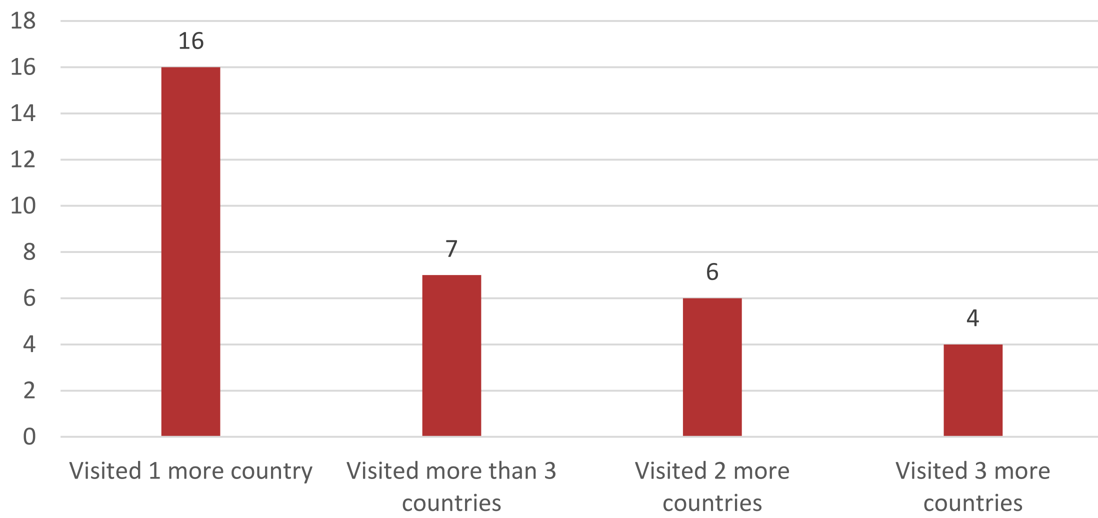

Figure 18: Frequency of combining visit to Ljubljana with visits to other countries (N=34).

15. Estimated costs per person per day

Out of 100 respondents, almost half of respondents spends between 40 EUR and 60 EUR (40), the following is the category of 10 EUR and 20 EUR (13) per person per day, however, closely are following tourists who spend from 0 EUR to 40 EUR (30) and between 60 EUR and 100 EUR (21). One of the respondents did not provide the data about their expenditure. This illustrates that on average tourists in Ljubljana in summer 2020 did not spend much. Especially if compared to the spending they did in 2019 according to the survey. The number was 140 EUR per day per person (the estimated costs in 2019 included costs for accommodation, food and beverage, shopping items, costs for cultural and recreational activities). Such low expenditure could be also result of the fact that youth has important share among the travellers and that hotels might have lowered the prices this summer due to the pandemic. Only 6 tourists spend more than 120 EUR per day.

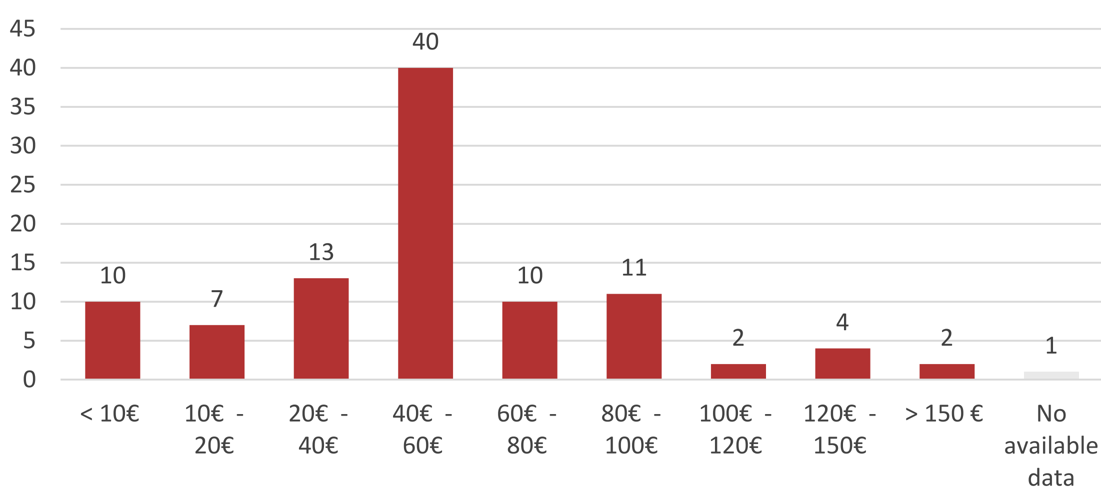

Figure 19: Estimated costs per tourist per day visiting Ljubljana (N=100).

16. Accessibility of the area

The total number of respondents is 100. The answers show that the accessibility of Ljubljana from outside and within is relatively good, though one needs to mention that the flight travel has become during pandemic and after the bankruptcy of national carrier quite obstructed. Half of the respondents states it is very easy to access Ljubljana (50%), little less state the travelling within the city is very easy as well (46%). Only few respondents find Ljubljana very difficult to travel from outside (6%) and within the city (5%). This can be explained best by the fact that mostly tourists came by car and car travel around Ljubljana can be navigated quite easily. All in all the results show homogeneously rated accessibility to reach Ljubljana from outside and to travel within.

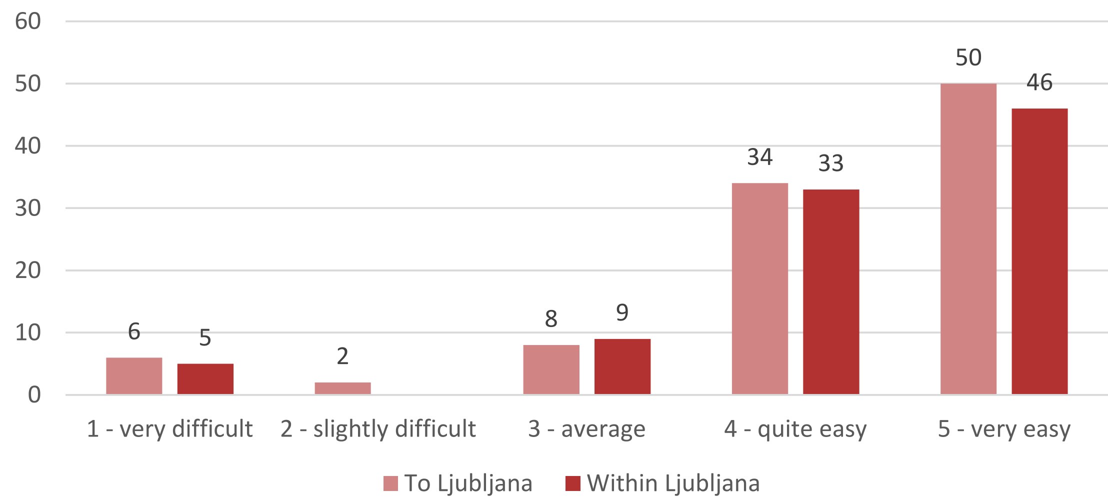

Figure 20: Accessibility of Ljubljana (N=100).

17. Type(s) of transportation

The total number of respondents is 94, out of which 53 respondents state to use their own transport when travelling to Ljubljana. Further, 18 tourists used train and 14 used other type of public transportation which is most likely the bus. Only 6 travelled by airplane. In comparison to the year 2019, this number is significantly lower. In 2019, almost half (47,5%) of the responding tourists travelled to Ljubljana by airplane, being the main type of transportation. The city centre of Ljubljana is small and easy to navigate on foot, therefore 61 respondents explored it on foot. Another prevailing option is by bicycle (17 tourists), only 2 of the tourists took part in the organized tours. Five respondents have not provided the answer to this question.

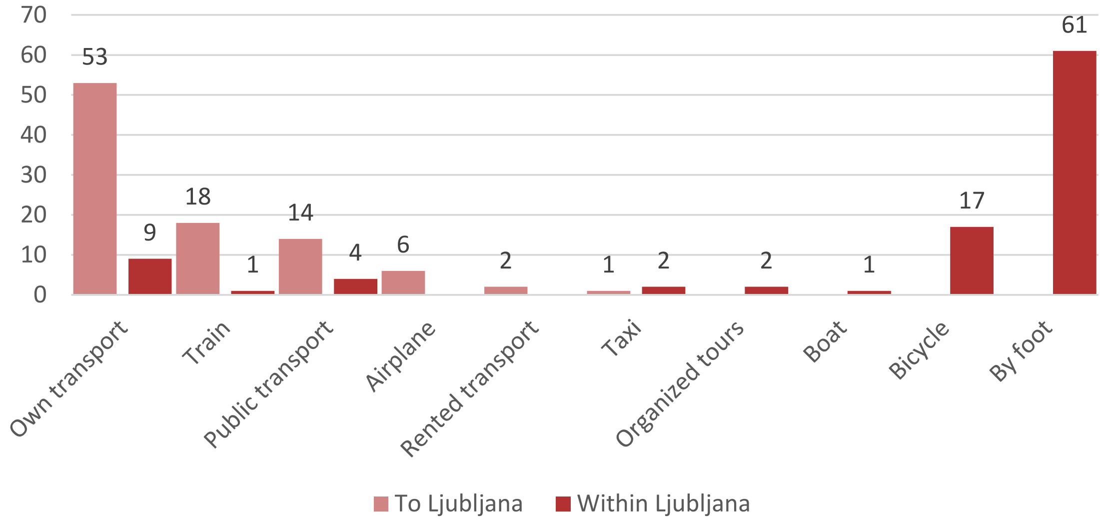

Figure 21: Types of transportation used to travel to Ljubljana and within Ljubljana (N=95).

18. Kind of methods to obtain information about the area

The total number of respondents is 100, which gave 212 answers. 71 out of 212 responses identify search engines as the most applied method to obtain information about Ljubljana. The second prevailing method is recommendation from other people (36), the so-called peer to peer promotion, and the third one is the social media (24). Interestingly, none of the respondents claim to obtain information about Ljubljana from travel agencies, less common way of information retrieving is also via brochures and posters, tourist information centres and tourism fairs.

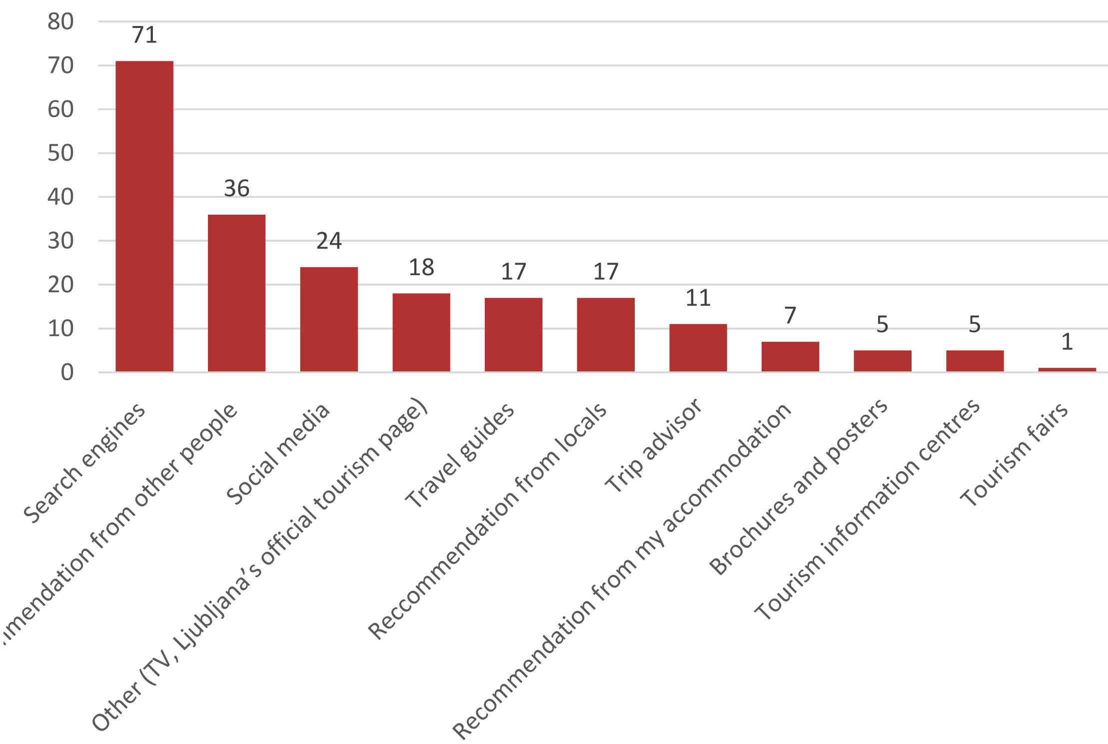

Figure 22: Methods of obtaining information about Ljubljana (N=100).

III Opinion about cultural tourism in the area

19. Satisfied with cultural tourism aspects

The total number of respondents is 100. On general, the respondents are satisfied or very satisfied with the aspects of visit to Ljubljana, especially with the safety of Ljubljana (68) and visit as a whole (57). They are satisfied with price of offers (50) and number of cultural offers (41). On average, Ljubljana was also evaluated as price friendly since 80% think the price versus offer is satisfying or very satisfying. Around one fifth think that number of cultural offers and their diversity is mediocre. If we compare this to the results of the survey on cultural tourism from 2019 it shows similar results. The respondents from 2019 were mostly very satisfied with the quality of green and open areas, personal safety and welcoming residents, locals of Ljubljana. None of the respondents is very dissatisfied (grade 1) with cultural tourism aspects.

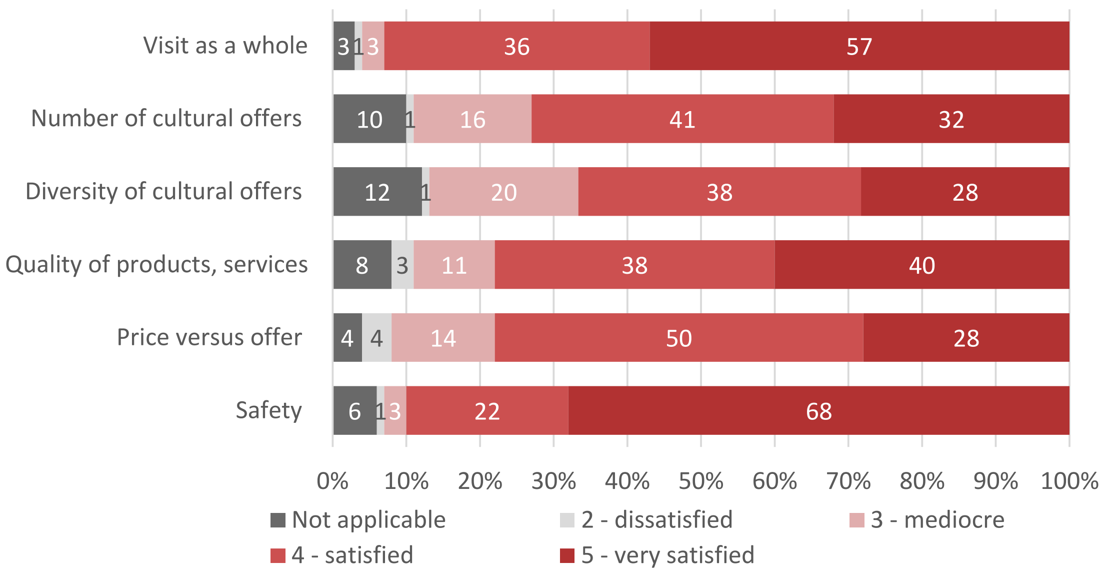

Figure 23: Tourists' satisfaction with cultural tourism aspects of Ljubljana (N=100).

20. Interest in cultural tourism attractions, events, sites

The total number of respondents is 100. When looking at tourists' interest for cultural offer in Ljubljana, the respondents are mostly intrigued by Ljubljana's townscapes, historical sites, heritage, restaurants and music events (Figure 21). The respondents have the least interest (graded with 1 and 2) in the cultural offer of Ljubljana that is not well developed or occurring which includes sport events, religious and health sites, dance events and (film) theatre (Figure 22). In addition, the theatre for which 60 tourists show no interest also has limitations due to the language barrier.

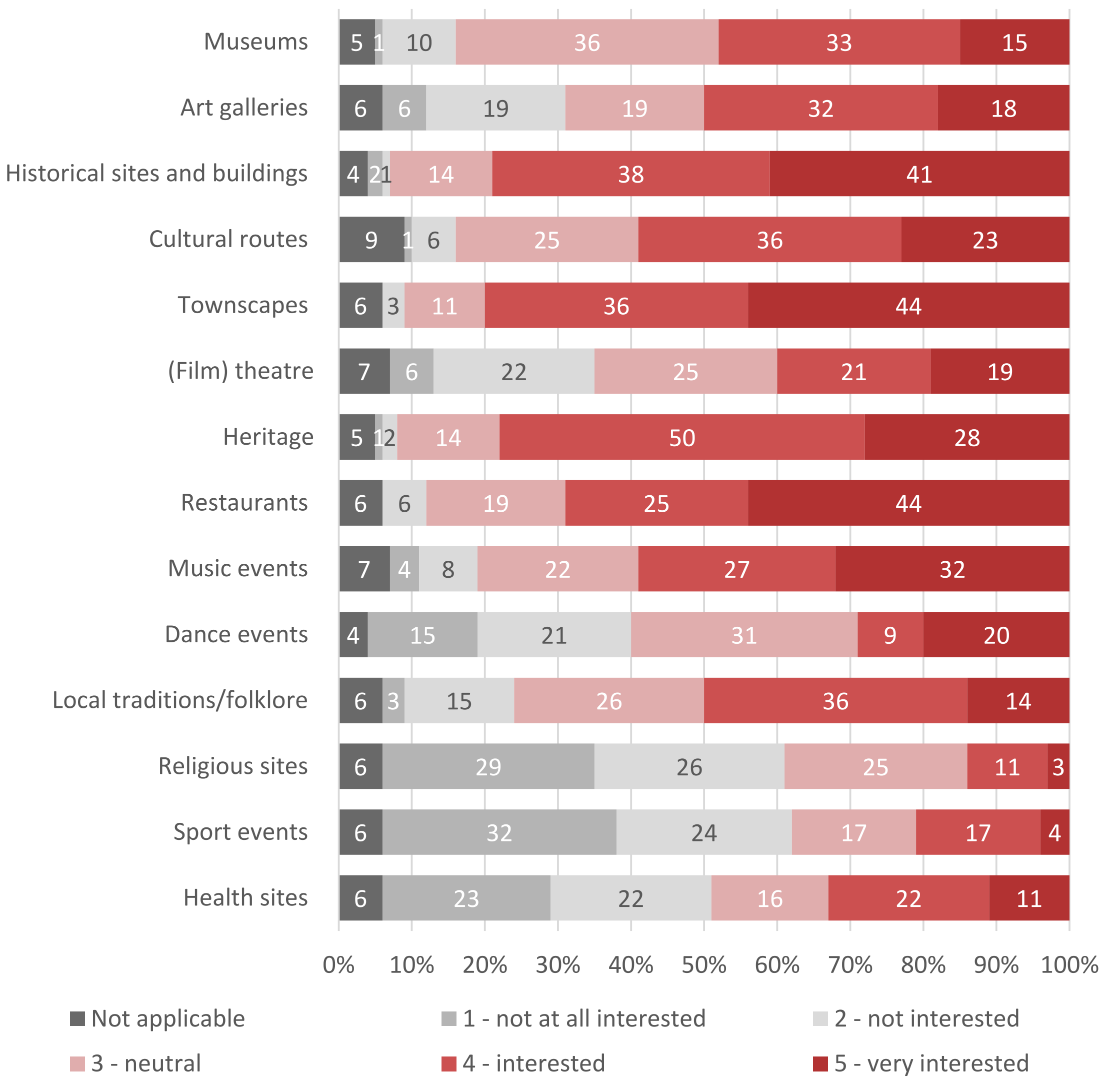

Figure 24: Level of interest in cultural tourism offer by tourists visiting Ljubljana (N=100).

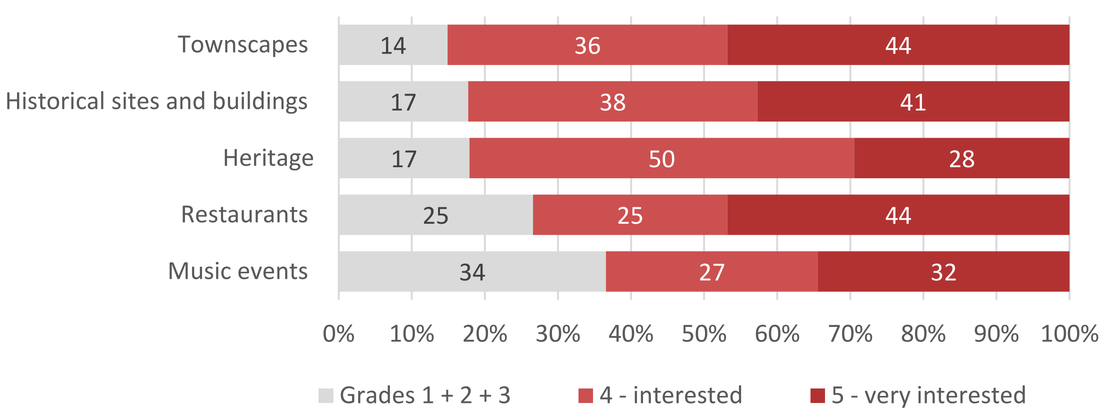

Figure 25: Level of interest in cultural tourism offer - five cultural offer categories with the highest scores (N=100).

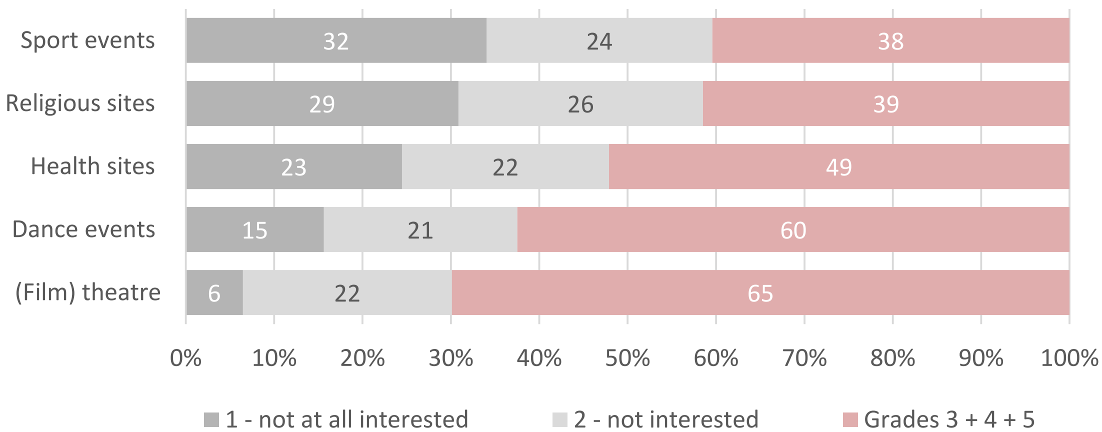

Figure 26: Interest in cultural tourism offer - five cultural offer categories with the lowest scores (N=100).

21. Three most important factors to visit the area

The total number of respondents is 100. 85 out of 100 respondents mention personal interest as the most important factor to visiting Ljubljana. The second prevailing answer are the low prices (63) and its location (54). The least relevant factors for visiting Ljubljana are third parties offers, such as inclusion of Ljubljana in a touristic offer by tourist offices and agencies or a tourist card offer as a pull factor. None of the two options were selected by the respondents.

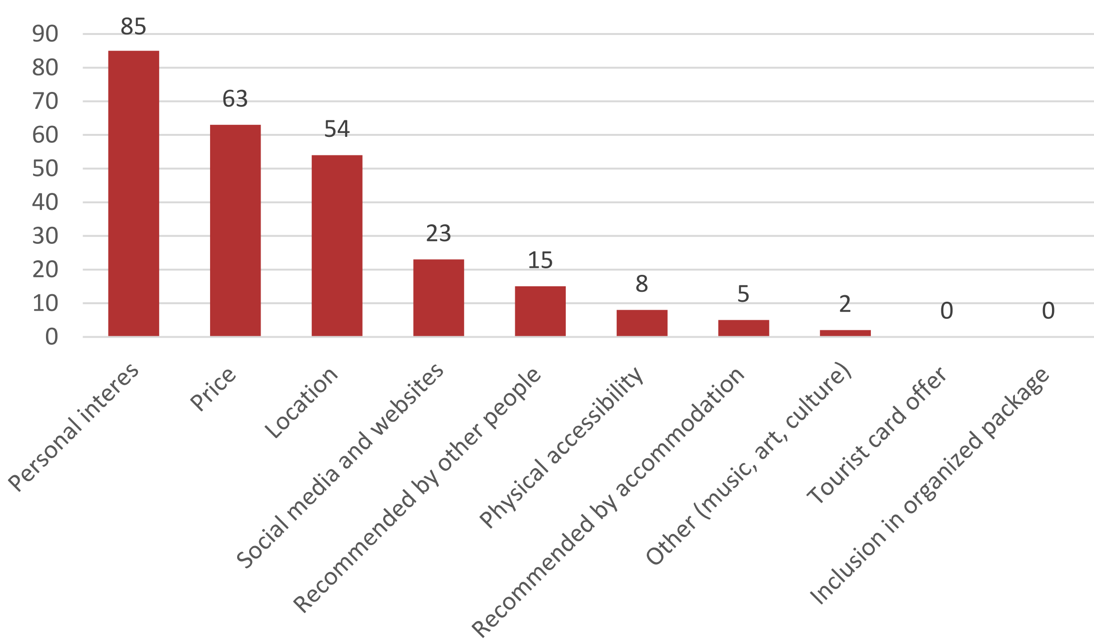

Figure 27: Most important factors enticing tourists to visit Ljubljana (N=100).

22. Willingness to recommend visiting the case study area to others
The total number of respondents is 100, out of which more than a half (53%) respondents state it is very likely they would recommend Ljubljana to others and more than a third (35%) say it is likely they would recommend Ljubljana to others. 10 respondents did not provide an answer and nobody said they would not recommend Ljubljana to somebody else.

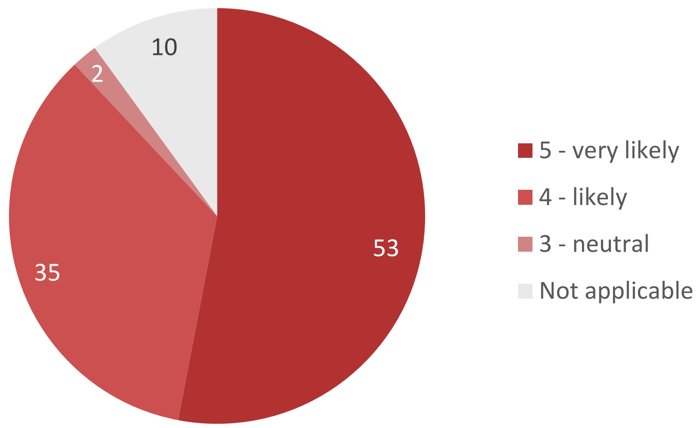

Figure 28: Willingness to recommend visiting Ljubljana to the others (N=100).

23. Missing tourist facilities and improvements in the area
The total number of responses to this open question is 14, out of which three respondents are missing more music events during weekdays, especially from Monday to Wednesday and open-air events. Two respondents also report unavailability to swim in Ljubljanica river and no other water activities available. Other suggestions for improvements of Ljubljana touristic offer are better variety of events, quiet nature places, better transport and service systems, information signs at cultural sights, nightclubs and a more contemporary approach to cultural offer in Ljubljana.

IV Cultural tourism and Corona

24. Corona and way of travelling

The total number of respondents is 100, out of which almost half of all responses show the respondents' way of traveling was affected very much (25) or much (23), due to the pandemic. 22 respondents have not provided an answer.

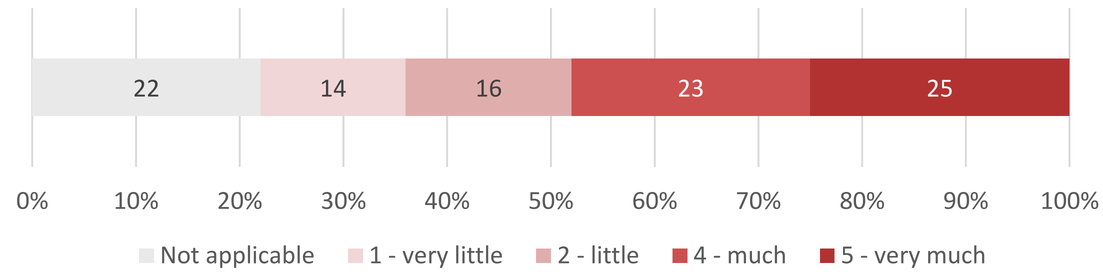

Figure 29: Changes in way of travelling due to Corona (N=100).

25. Description change in travelling

Out of 73 responses to this open question, the respondents say they follow higher health precautions, such as wearing masks and avoiding crowded events and sites or not using public transportation due to requirements to keep a minimal distance (20 responses). Respondents also visit closer and safer countries (11), travel less (9), use their own transportation, a car (9), and pay more visits to touristic sites in close proximity to their residence (8). Some state there has been few cancelations of pre-booked accommodations and events, especially 'couch-surfing' and organized touristic trips (6). Three responses also touch on the uncertainty of booking a flight and another three respondents stress on the annoyance of more expensive visits, due to booking a safer option of an accommodation. Some respondents also feel their touristic visits are replaced by going in to nature more (1), experience more difficulties in meeting new people due to social distancing (1) and to have lost the spontaneity of a site-seeing due to a careful planning every visit instead (1).

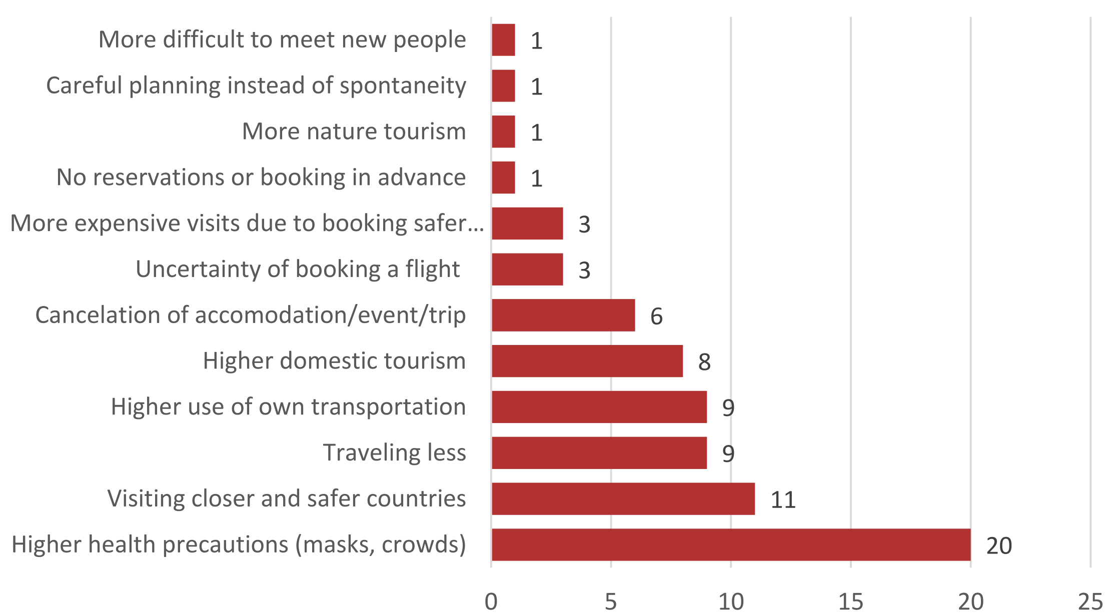

Figure 30: Changes in traveling habits of tourists visiting Ljubljana due to Corona (N=73).

26. Earlier visit to area

The total number of respondents is 100, out of which 64 state they have not been in Ljubljana yet and 35 of them say they have already been in Ljubljana. The later are most likely the domestic, Slovenian tourist. One response is not applicable.

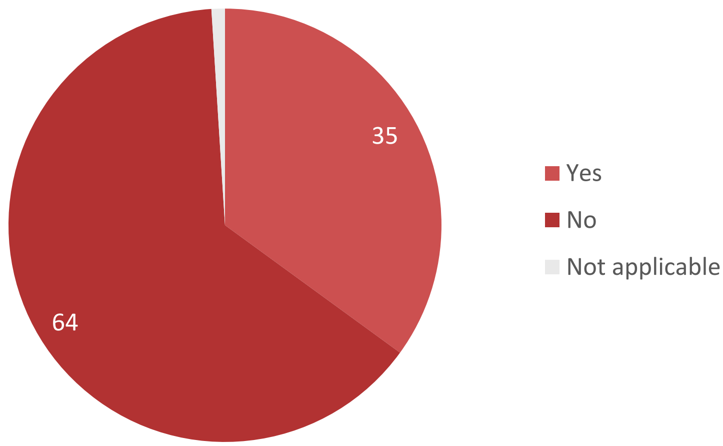

Figure 31: Ratio of tourists who have been to Ljubljana before (N=100).

27. Last visit to the area

The total number of responses is 35, out of which 27 show the respondents have already visited Ljubljana in 2018-2020. Three respondents have visited Ljubljana in 2015 or previous years and one has visited Ljubljana in 2016-2017. Four responses are not applicable.

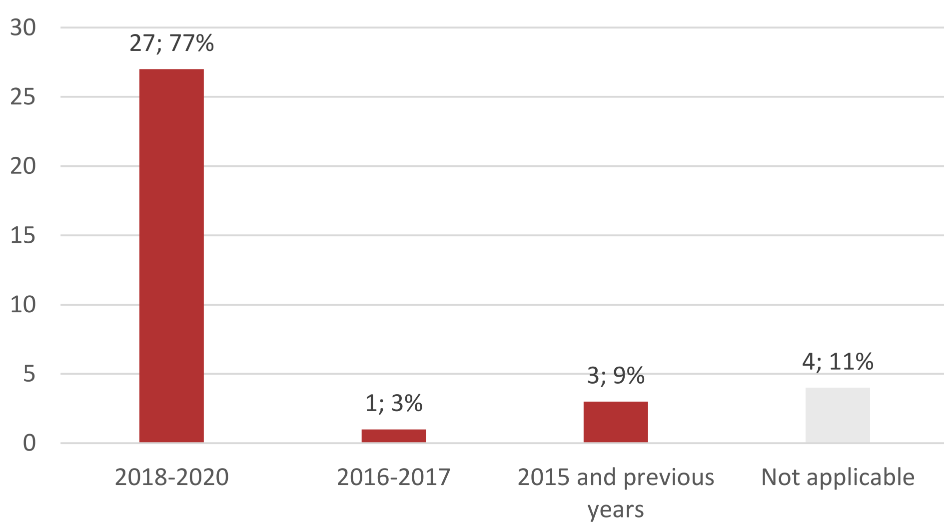

Figure 32: Time period of the previous visit(s) of tourists to Ljubljana (N=35).

28. Satisfaction with earlier visit

The total number of responses is 35. The respondents are generally very satisfied with earlier visit of Ljubljana (17), especially with the safety of the area (24) and the other elements of visits, including number of cultural offers, its diversity, quality of products, services and price versus offer.

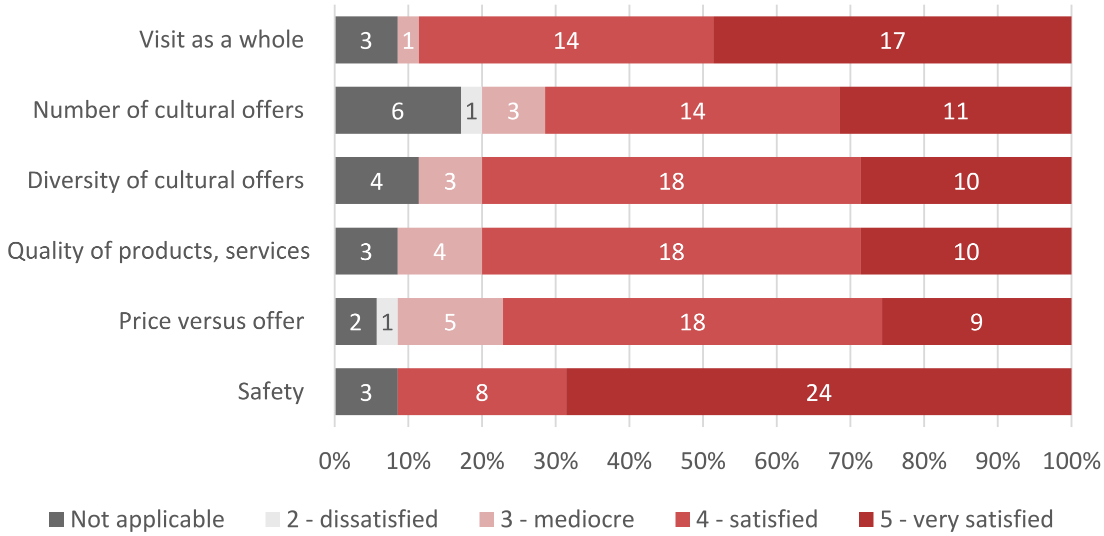

Figure 33: Satisfaction with earlier visits of Ljubljana (N=35).

29. Difference in satisfaction before and during Corona

The total number of responses is 35, out of which the most responses (13) show there is no difference in satisfaction in comparison to previous visits to Ljubljana. 9 tourists think it was better before, whereas 8 cannot say if there is a difference. Only 5 respondents say their current visit is better.

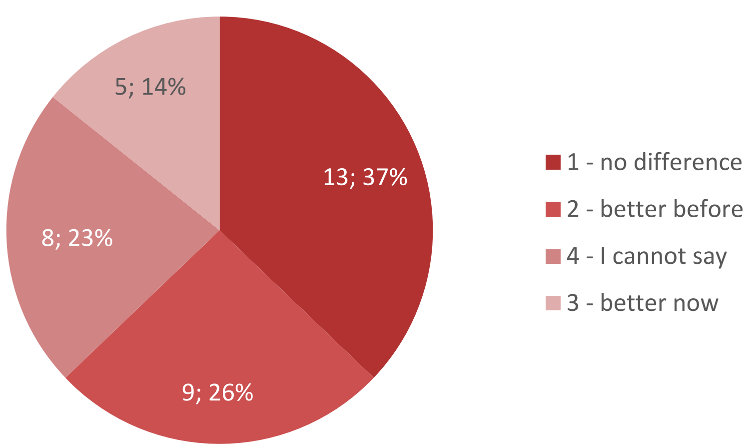

Figure 34: Difference in satisfaction of visiting before and during Corona (N=35).

SURVEY WITH THE RESIDENTS

1. Methodology

Used method of sampling

The survey with the residents of the City municipality of Ljubljana was performed in the period from August 12th until September 10th, so altogether 30 days. Data gathering was done via on-line platform 1KA and via service (VALICON) specialising in data gathering by administering questionnaires via the on-line panel. We have started with an on-line survey by distributing it via different channels, e.g. FB of the Department of Landscape Architecture, FB of a group interested in Ljubljana city development, via e-mails to personal acquaintances and to the people who showed interest in the topic already last year and filled in a similar survey in 2019. In this way the sample was partially random and partially targeted. Since this approach proved in two weeks inefficient (only 49 respondents) and we were not able to reach the targeted size of the sample which was 300 inhabitants, we used the survey service, provided by a company specialised for polling. We gathered three offers and selected the most experienced.

Introduction of the surveys to target groups

The survey was introduced to the target groups via an e-mail or via a FB message in which we explained the aim of the survey, a few words about the SPOT project and how long the research is going to take. The VALICON company did the same, sending to their on-line panel explanation about the survey and its aims. All surveys were filled in on-line.

Number of respondents per target group

The intention was to have a representative sample of 300 inhabitants. This accounts for a representative sample of population of 294.054 (2020) with a margin of error of 1% and the confidence level of 99%. With the e-mail distribution it was difficult to reach the population, thus the selection of the service. They have sent it out to around 1.000 potential respondents of whom 261 responded. The intermediate company said that regarding the age they are not able to provide the representative sample due to the fact that participation in the on-line panel is voluntary and a knowledge of internet use is required. The later can be difficult for the elderly, thus it is less likely they participate in such a sample. Regarding the comprehension of the questionnaire there were no complaints since the cultural tourism or cultural offer is something everyone can relate to without a deeper knowledge. Altogether we collected 306 responses, so the numerous for our report is 306.

For the comparison report (deliverable 1.4) a random sample was retrieved by selecting 20 fully-answered surveys from 1KA and 20 fully-answered surveys from VALICON. After selecting 40 surveys, we checked the basic demographic information of the sample such as gender, employment, age, residency, to make sure the gender was well-balanced and that employment, age, residency etc. was distributed according to the population characteristics of the City Municipality of Ljubljana. Finally, we have re-sorted the categories as instructed by the WP1 excel template and translated the text answers into English language and sent them over to the Dutch team.

2. Results of the surveys for residents

I Profiles of residents – basic information

1. Gender

For the question about gender, 306 answer in total were obtained. Slightly more than half of the respondents, which is 156 people, were women (51%), less than half of the respondents, 144 persons, were men (47%). 6 persons did not answer this question (2%). This fully corresponds to the whole population of Ljubljana in 2020 (Statistical Office of Republic of Slovenia) in which 150.664 (51%) is female population and 143.390 (49%) is male population.

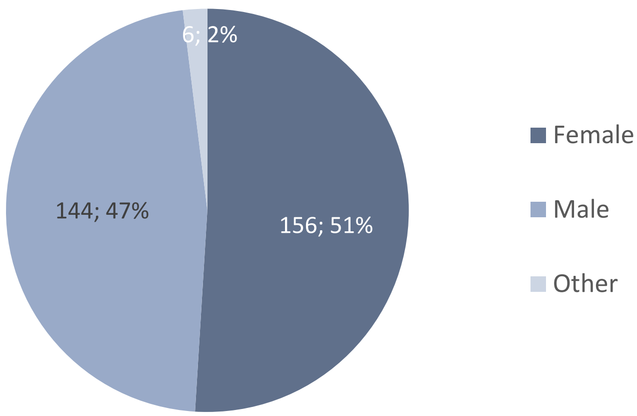

Figure 35: Gender distribution (N=306).

2. Age

Total number of respondents for the question of age was 300, for 6 of the respondents we did not get the information. The figure below shows three prominent age groups in which more than half of the respondents belong. These are age groups: 50–60 years (21,0%), 30–40 year (20%) and with a little lower percentage of 19,7% 59 respondents come from age group of 40–50 year. The lowest share shows the age groups of less than 20 years (1,7%; the respondents needed to reach an adult age, thus 18 years and more) and with the age of more than 80 years (1,3%). This groups is represented by only 4. The table 1 shows that in the sample the population in the age between 30 to 70 years is overrepresented, the age groups 20 to 30 and 70 to 80 years old are correctly represented and the elderly and the youth under 20 years old are underrepresented.

Table 1: Comparison of the representation of the age groups in the sample and in the whole population.

Age group / **Number of inhabitants**		**<20**	**20-30**	**30-40**	**40-50**	**50-60**	**60-70**	**70-80**	**80<**
Sample	306	1,7	13,3	20,0	19,7	21,0	14,0	9,0	1,3
Population	294,054	3,4	13,5	14,5	14,7	13,0	11,8	8,0	5,8

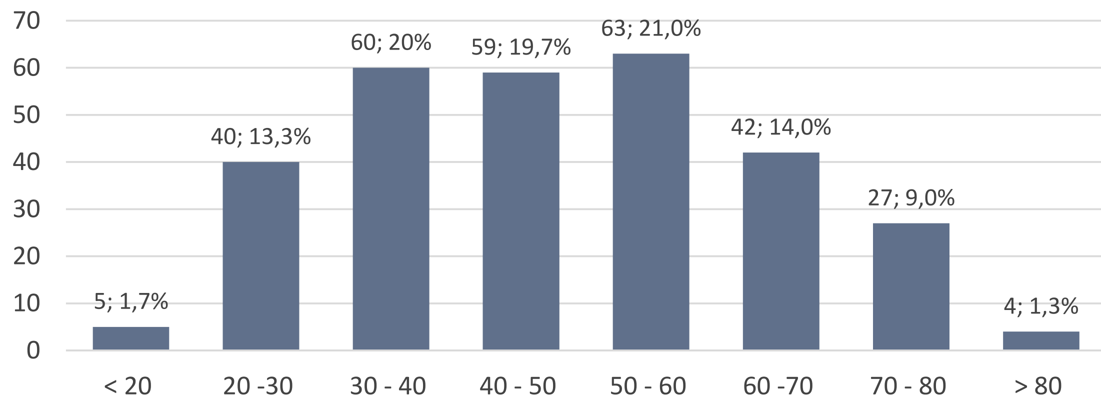

Figure 36. Age distribution of the residents (N=300).

3. Country of origin

300 respondents have the country of the case study as their country of birth, which is 98% of all respondents. Only 2 residents, which is 0,7% have been born in other countries, namely these are Cuba and Russia, and 4 residents (1,3%) did not answer this question. The total number of respondents is 306.

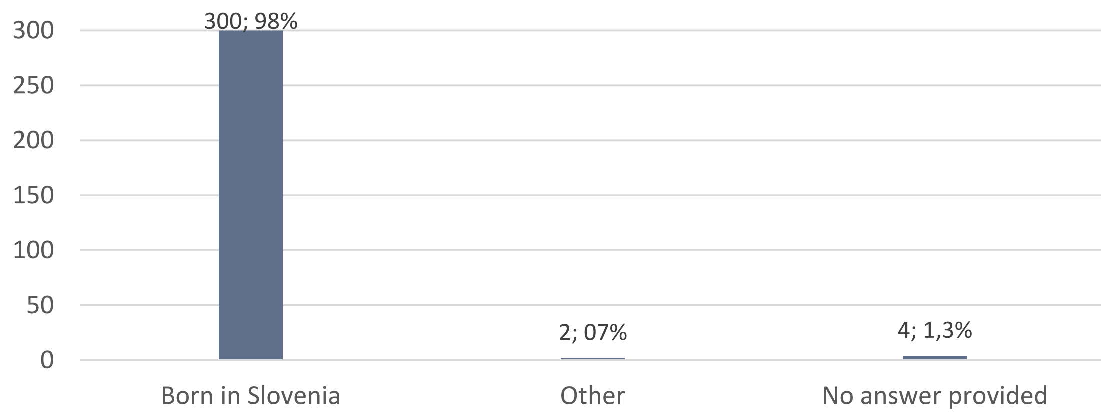

Figure 37: Residents' country of origin (N=306).

4. Education

Since in Slovenia it is common to talk about finished level of education (VIII altogether) and not about attained years of education, we offered in the survey question levels of education and then calculated them back to years. How we did this, is explained in the footnote[2]. Two categories, 10 and

13 years have no data because they do not correspond to any of the official levels of education in Slovenia, therefore are not represented in the chart.

Of the total number of 300 respondents, almost a third of them have completed 15 years of education which stands for Bachelor's degree. General high school, 12 years of education, was completed by 78 respondents (26%). Similar shares are shown in categories of 14 years of education or Technical diploma (16%) and more than 16 years of education or Master's/Doctorate degree (14,7%). The lowest

[2] The calculated years of education are classified in the following way: 5 years = none completed (at the class 5 most of the pupils who do not finish grammar school usually fall out), 8 years =primary school, 11 years = technical high school, 12 years = general high school, 14 years = technical diploma, 15 years = bachelor's degree, 18 years = master's degree, 22 years = doctorate degree.

percentage show in category of less than 10 years (3%), which in our case study combines primary school (8 years) and not completed school (5 years). In conclusion, more than 60% of respondents combined have completed at least 14 years of education, thus have a college or university level of education.

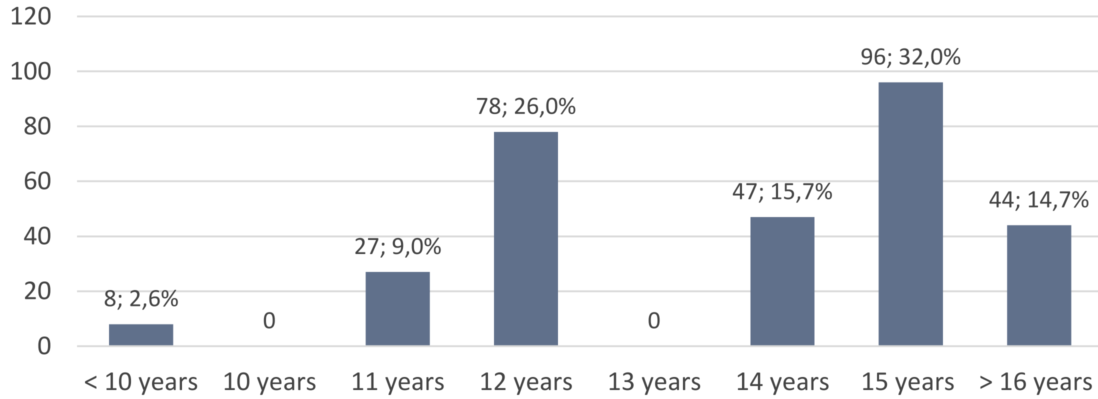

Figure 38: Number of years of education (N=300).

5. Occupation

Question about occupation has the lowest number of responses, compared to other questions, 280 respondents in total. In addition to prescribed categories, four categories emerged such as retired (25%), students (4%), unemployed (4%) and self-employed (1%). A good third of persons belong to occupational group of professionals (32%). Among these professionals we can list engineers, architects, designers, health professionals, university and higher education teachers and administration professionals. More than a tenth of the persons work as services and sales workers (9%). Clerical support workers accounts for the same share of 9% as services and sales workers and managers with 23 respondents cover 8%. Only one respondent falls into the category of plant and machine operators and assemblers (0,4%) which illustrates the lack of the blue collar workers in the sample, and only 2 respondents belongs to a skilled agricultural, forestry and fishery workers category. The later is not so surprising since Ljubljana has a service-oriented economy in which agriculture does not play an important role at all. This category is more often represented in a rural setting.

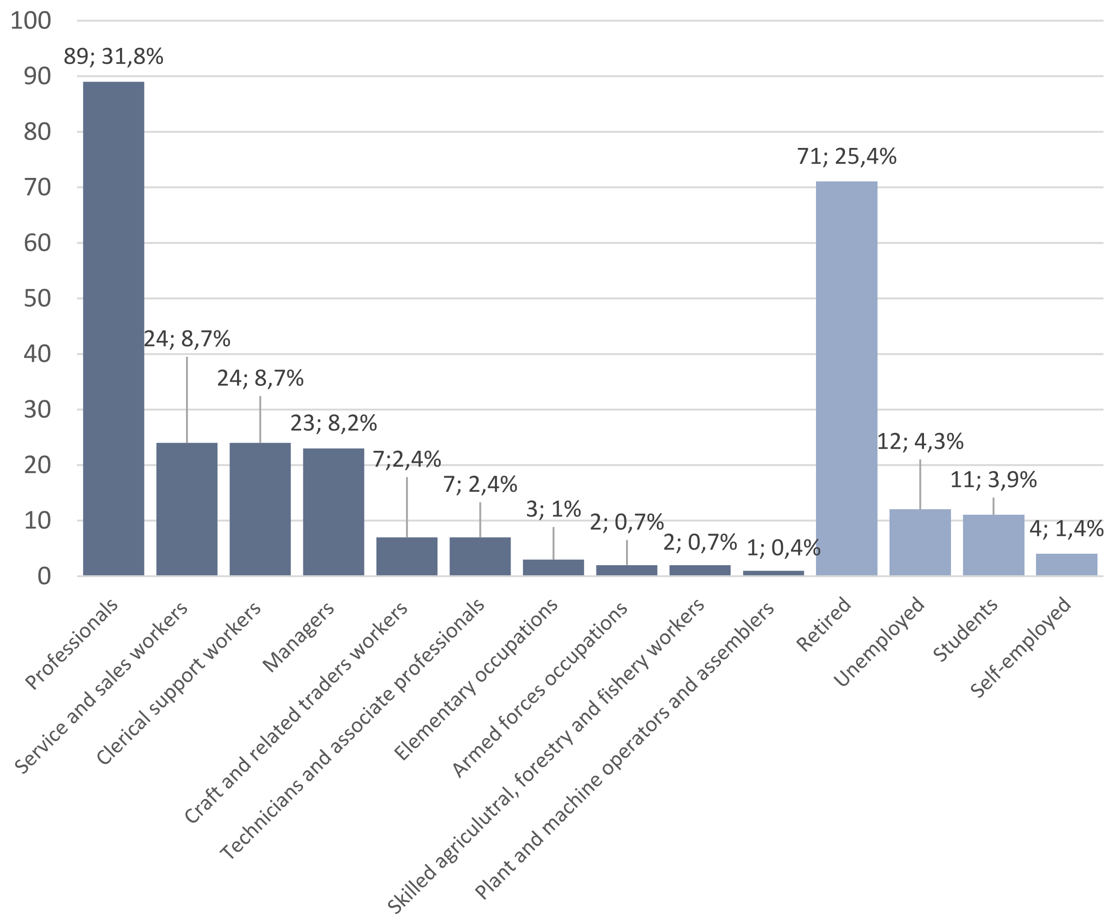

Figure 39: Occupation of residents (N=280).

6. The total gross household income per year

The information about the total gross household income per year has been provided by 231 respondents, 75 have declined to answer this question. Almost a third of the respondents (26%) falls into the category of 20.000–40.000 EUR and 72 respondents (23%) fall into the category of 11.000–20.000 EUR. Lower were the numbers for category of less than 10.000 EUR(8%) and 40.000-60.000 (11%). A tenth of the total number of residents belong to a higher household income per year, namely 3% of respondents' households earn 60.000–80.000 EUR and only 1% of households 100.000–120.000 EUR or more than 120.000 EUR per year. Figure 6 below shows that almost 90% of the total number of respondents have the total gross household income per year below 60.000 EUR.

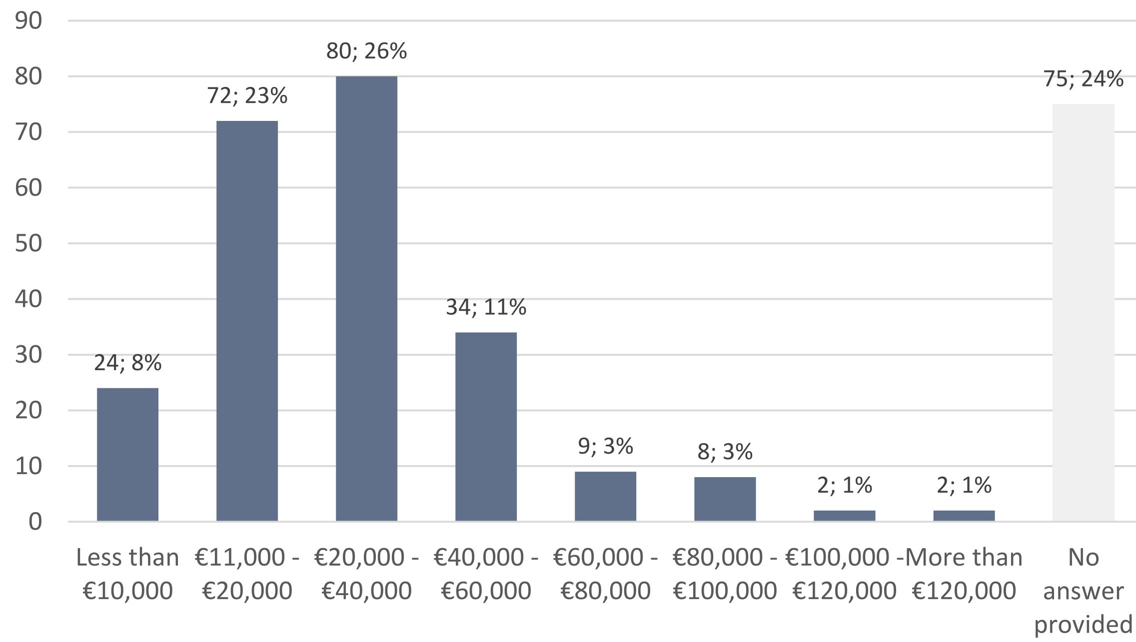

Figure 40: Total gross household income per year (N=306).

7. Household composition

The total number of respondents for household composition was 306. Figure shows that a third of respondents (36%) lives as a couple, 21% as a unit of three people, 15% of respondents live alone and 20% of respondents live in a unit of four people. With increasing number of people living in the same household, the number of such households decreases. Only 12 respondents (4%) live in a household of five people and 3 respondents (1%) as more than five people. 3% of the total number of respondents did not answer this question. In conclusion, households with one to three persons per household predominate.

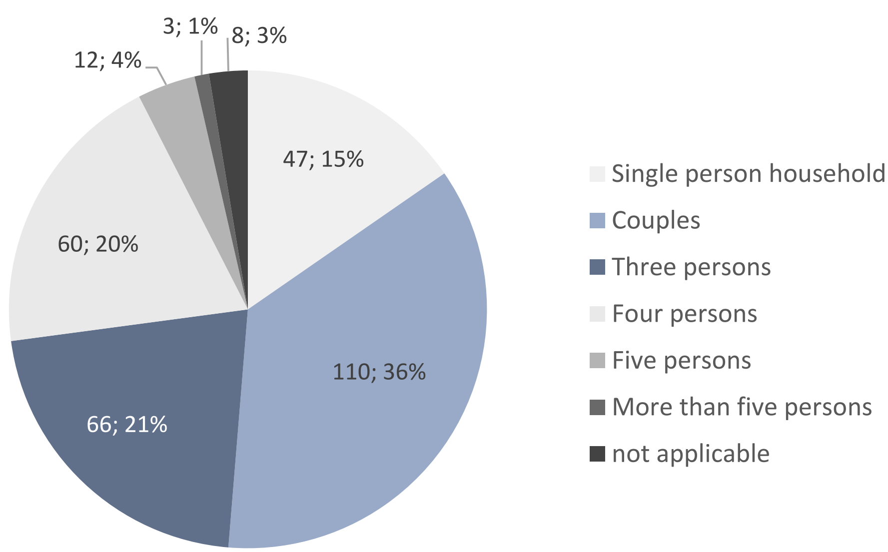

Figure 41: Share of household types according to the number of persons in it (N=306).

8. Postcode

Total number of respondents answering this question is 298. For the purpose of showing the results, we had to approach it somewhat different. Our case study is the City of Ljubljana which has one general post code. However, its city quarters have each their own postcode number (shown on a map below), so we assigned the respondents the postcodes on the basis of the quarter in which they live. To properly classify postcodes in prepared categories we roughly measured the distance from Town hall as centroid to the most distant point of concentrated settlements (the last point of the urban area at the transition into the dense green areas) in a singular quarter by using cartographic tool Google Maps. Based on measurements we have classified postcodes in categories and sum the number of respondents from different postcodes, which allowed us to create the required chart. Figure shows that more than a half of respondents live in the radius of 2 to 4 km (69%) and 54 respondents in the radius of 4 to 8 km (18%). Lower were the numbers for categories of radius less than 2km (12%) and for radius of more than 8 km (1%).

Table 2: Number of respondents living in different postcodes – city quarters of Ljubljana.

City quarter	Golovec	Sostro	Posavje	Šmarna gora	Črnuče	Rožnik	Jarše	Dravlje
Number	2	3	4	7	8	10	11	13
% in the sample	0,7%	1%	1,3%	2,3%	2,7%	3,5%	3,7%	4,3%
Cultural quarter	**Rudnik**	**Trnovo**	**Polje**	**Moste**	**Vič**	**Center**	**Bežigrad**	**Šiška**
Number	14	14	22	27	31	35	47	50
% in the sample	4,7%	4,7%	7,4%	9%	10,4%	11,7%	15,8%	16,8%

Table 3: Number of respondents according to their city quarter and its distance to the city centre.

Radius	< 2 km	2 – 4 km	4 – 8 km	< 8 km
City quarters	Center	Šiška, Bežigrad, Jarše, Moste, Golovec, Rudnik, Trnovo, Vič, Rožnik	Posavje, Črnuče, Polje, Dravlje, Šmarna gora	Sostro
Number of residents (sum)	35	206	54	3
Percentage	11,7%	69,3%	18,0%	1%

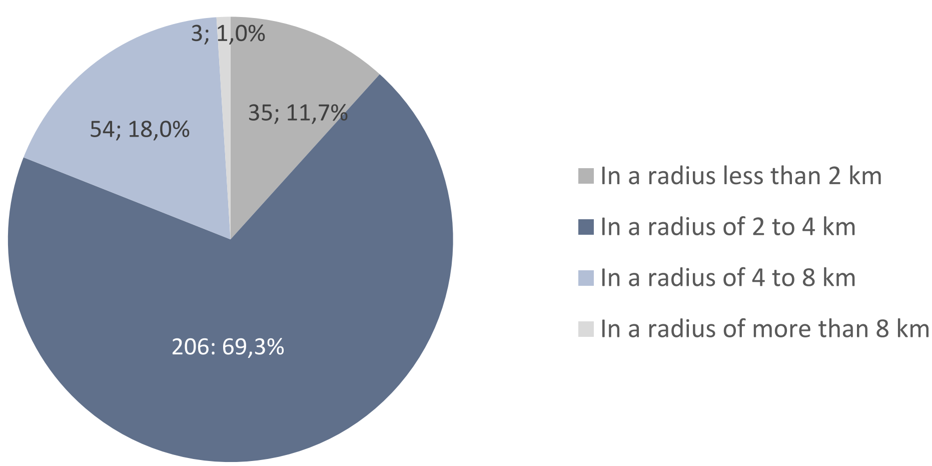

Figure 42: Postcodes combined based on residents' distance from each other (N=298).

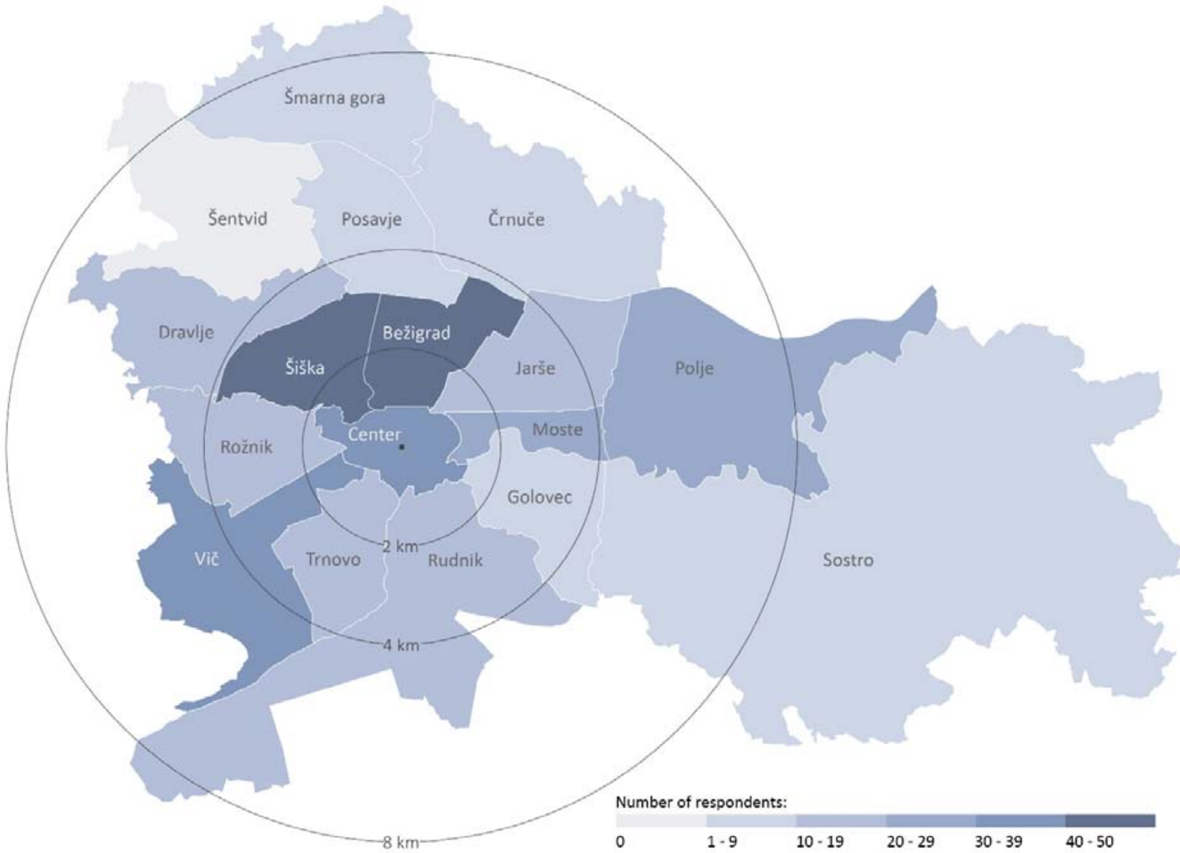

Figure 9: Number of respondents in different postcodes and distance of respondents from each other.

9. Cultural activities/sites in this area

Analysis has shown mostly positive attitude towards cultural tourism in the case study area Ljubljana. Residents have most often exposed generic names for the cultural offer such as are museums, galleries, theatre, events etc, thus different cultural activities, suitable for both residents and tourists. Amongst specific cultural activities, present and characteristic for Ljubljana, the following ones were mentioned: Ljubljana Festival, Drama (the national theatre), Ljubljana Castle, Opera, Trnfest (a street festival), LIFFE (Ljubljana Film Festival) and some others as presented in the Figure 10. The architecture and open spaces were not so highly featured by the residents, the most mentioned one is the park Tivoli and Ljubljana Castle which as well has a public square.

Regarding the connotations of the answers to this question, no negative connotation was detected. All statements were positively oriented, showing residents positive attitude towards cultural tourism. Cultural offer is improving in parallel with increasing number of tourists, providing not only better promotion but also more diverse and more accessible offer for residents.

Figure 10: The most common associations residents had about the cultural offer in Ljubljana.

Table 4: Connotations of the cultural offer in Ljubljana.

	Mentioned the most frequently	Mentioned the least frequently
General offer	museums (93) theatre (58) galleries (54) events (38) cinema (35)	tourist boat (3) outdoor (4) cultural monuments (5) art (5) architecture (5)
Specific Offer, events	Ljubljana Festival (94) Opera and Ballet (55) Ljubljana Castle (41) Ljubljana City Theatre (40) Cankarjev dom (21)	ŠKUC (3) Mini Theatre (3 Museum of Architecture and Design (3) City Gallery (3) Španski Borci (4)
Open spaces*	Križanke (13) Šiška Cultural Center (12) Tivoli (12) Tromostovje (9) Dragon Bridge (7)	Žale (3) Botanical Garden (3) Plečnik's stadium (4) Plečnik's Market (4) Rožnik (5)

** This category is relevant for the UL team and our focus on the place-based tourism.*

In comparison to the connotations we got in the survey in 2019 (N=596), we can again see residents' positive attitude towards cultural tourism. Some differences are evident between figure 10 and 11. The first one focuses on specific offer, such as Ljubljana Festival, Drama, LIFFE and similar, while the second figure shows more generic based offer such as concerts, theatre, museums, cinema. Survey from 2019 was based on the frequency of visits to the cultural offer, which, in addition to the residents' positive attitude towards cultural tourism, also showed the structure and diversity of the offer. The most frequently mentioned categories were ranked among the main attractions of Ljubljana, which coincides with the results shown in figure below.

Figure 11: The most frequently visited cultural offer by residents in Ljubljana in 2019 (Marot et al., 2019).

10. Importance of cultural attractions/sites/events

Importance of cultural attractions, sites or events was measured on a scale from 1 – not important at all to 5 – very important. Total number of respondents is 306. The five categories which were rated highest (scored with 4 and 5) are in descending order: Historical sites and buildings with more than a half of responses being “very important” (94%), Cultural heritage sites and buildings (92%), cultural routes with 82%, townscapes with 82,4% and music events such as concerts and festivals with 84%. Categories rated lowest in ascending order (scored with 1 and 2) are religious sites an events (39%), health sites such as spas or hot springs (27%), dance events with 12%, local traditions and folklore with 9% and lastly sports events with one tenth of responses (12%). Figure below shows a strong note of culture, history and music in the case study Ljubljana and mostly favours offer which is related to the classical cultural tourism. It shows city’s urbanity and relatively small size in which other activities, based on natural resources, such as spas, are not really present. Five lowest rated categories further support previous statement about the city as an urban area not providing conditions for some of the activities and confirm Ljubljana is not among globally important religious cities nor the spa tourism destinations.

Figure also shows potential of enabling the further development of otherwise lower rated cultural offer which should be in an urban area strongly represented, such as film theatre, dance events etc. Museums, galleries and film production are present in Ljubljana, but apparently not promoted enough or interesting enough to the residents. More to that, very likely the current COVID-19 crisis has influenced how well certain categories scores. In comparison in 2019 study, restaurants, food festivals and more “lifestyle oriented activities” scored high but with 2020 situation, most of the listed offer was not available or did not take place.

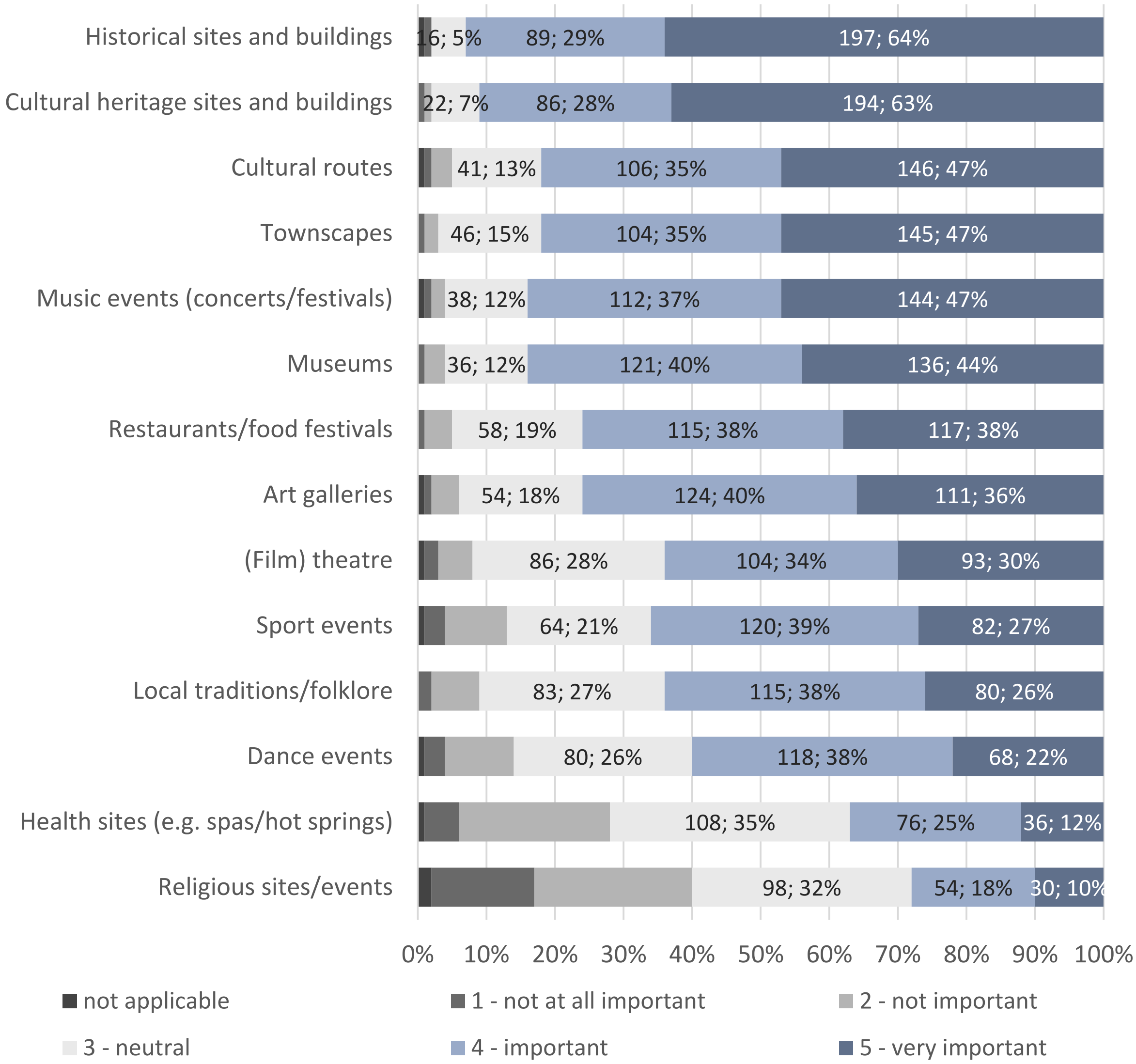

Figure 12: Importance of cultural attractions/sites/events for the cultural offer of Ljubljana (N=306).

11. Accessibility of the area

Chart shows accessibility to and within Ljubljana. Total number of respondents is 306. We can see better results in terms of accessibility within Ljubljana. Almost 60% of respondents rated accessibility as very good taking into account both categories: very easy (20%) and quite easy (39%). Results for accessing Ljubljana from outside are very similar, 15% of respondents think Ljubljana is very accessible from outside and 42% agree it is accessible quite easy. Only 1% of respondents rated accessibility of Ljubljana from outside as very difficult, although the accessibility was quite worsened in 2020 due to the broken-down flight connections and a minimal number of transnational bus and railway connections.

In conclusion, Ljubljana is a very accessible city. Traveling to Ljubljana is possible with all sorts of motorized transport, such as car, train or a bus, only flying is currently very limited which is mostly due to the bankrupt national carrier (October 2019). The same goes for travelling within Ljubljana, where public transport in a form of bus or the public rent-a-bike system in general allow for an easy travel.

Even more, the Ljubljana city centre is entirely walkable, its size allows residents to walk from one part of the city to other, though for daily errands they might use also other means of transportation.

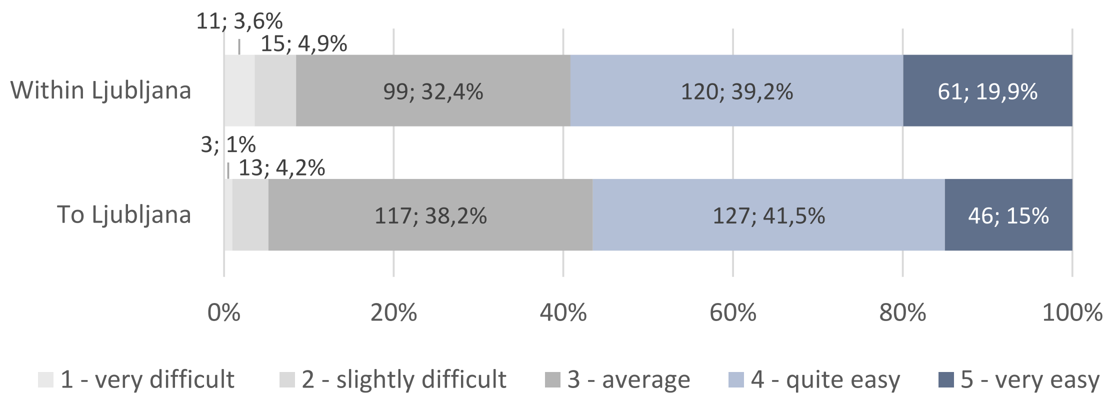

Figure 13: Accessibility of the area (N=306).

12. Perception of the number of tourists by residents

Total number of respondents answering a question about their perception of the number of tourists is 306. Chart shows that almost a half of respondents rated the number of tourists as 4 – satisfying (41,8%) and additional 17% as very satisfying. Only 39 out of 306 residents complained about the number of tourists and either evaluated as 1 – very dissatisfying (3%) or 2 -dissatisfying (10%). If we compare this with the results of the surveys about inhabitants' perception of urban tourism and tourists done annually by the Tourism Ljubljana, the results are similar. Namely, the residents have in general positive attitude towards the tourism, though in the year before COVID-19 a slight change towards negative perceptions could have been noted. Since pandemic emptied the city or return the tourist number to numbers at least five and more year ago, the results are also more positivistic in our survey.

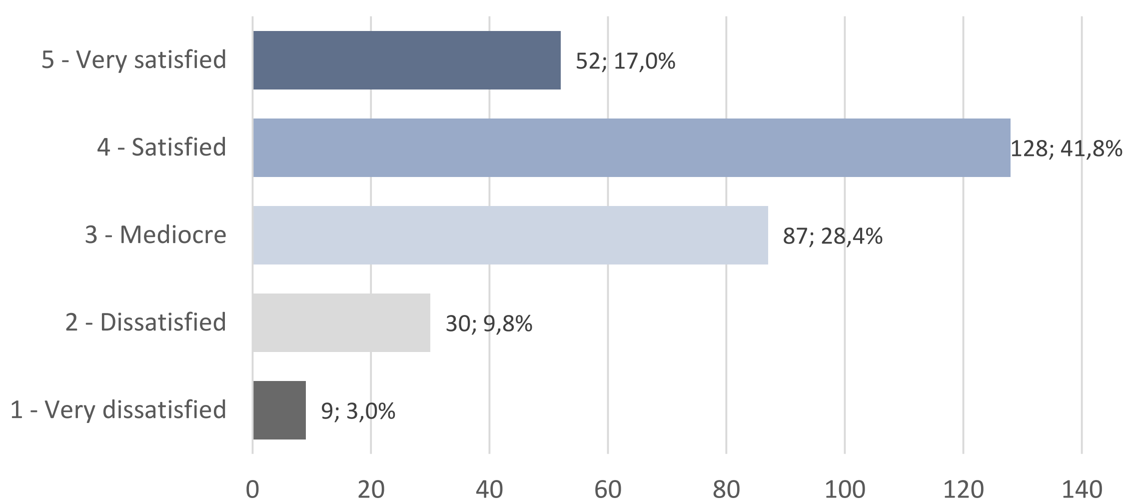

Figure 14: Residents perception on the number of tourists (N=306).

13. Perception of the impact of cultural tourism has on the case study area

For the question on perception of the increased impact of cultural tourism on the area, the total number of respondents is 297. The combined answers of great or major impact of tourism account for 70% of all answers of which 60% claim that increase in cultural tourism has inflicted great impact on the area, and 22% states it has a major impact on the area. 17% of respondents are sceptic about the connection between the cultural tourism and the development of Ljubljana since they selected the answer "neither negative not positive impact" and 7% altogether selected either a minor or negative impact.

The negative impact of cultural tourism could be explained by the increased use of infrastructure by the tourists, by a higher demand for services, impact on the quality of life and employment opportunities. All in all, also in line with the survey done in 2019 residents are in majority convinced that the cultural tourism provides more employment (though mostly student jobs), increase the number of events and variety of cultural offer in the case study area, brings global flavours to the local environment and enables a cultural exchange between the locals and the visitors.

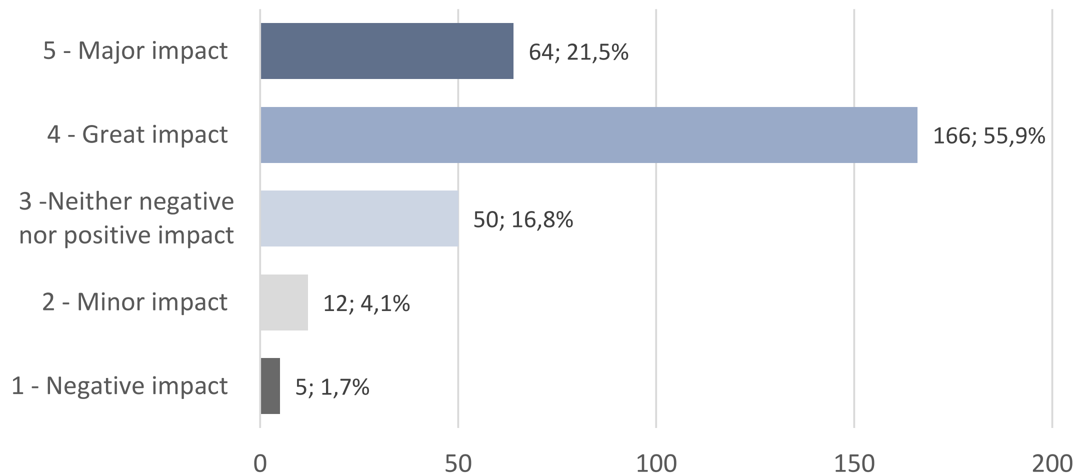

Figure 15: Impact of increased cultural tourism on the area (N=297).

14. Receive of discounts as a local to attend cultural attractions/events/sites

Total number of respondents is 306. Chart clearly shows two predominant categories regarding existing discount for residents for visiting cultural attractions, cultural sites or events. The residents are of prevailing opinion they do not receive any discounts to enjoy the cultural offer of Ljubljana (59%), In addition, another third (32%) claims they receive minor discount. Only 10% of all profit from moderate to major discount. Shown also in our last year research the residence in Ljubljana does not give you any special advantage besides the spatial proximity to the offer. Same discounts apply to residents and to the tourists which are categorised according to the tourist target groups: youth, families with pre-school children, elderly, disabled or unemployed. However, we also must report that the ticket prices in Ljubljana are in comparison to the other attractions in the Central Europe comparatively cheap. The single entrance ticket to the most of museums is around 10EUR. The only more expensive offer is the Festival of Ljubljana, the Opera and Ballet and the events in Cankarjev dom, the major cultural house in Ljubljana. According to our research in 2019, these institutions, besides Šiška Cultural Centre and Slovenian Philharmonic do not have uniformed ticket prices, such as museums or galleries, as the prices are based on the type of offer or event taking place (eg. Šiška Cultural Center offers music, film and theatre events, meaning the prices vary). Also, listed institutions do not offer different types of discount, such as Ljubljana castle which offers family ticket, regular ticket, student ticket and senior ticket, but they do offer a certain percentage of event-dependent discount, such as Šiška Cultural Centre, which offer a 20% discount valid for children and disabled on certain events.

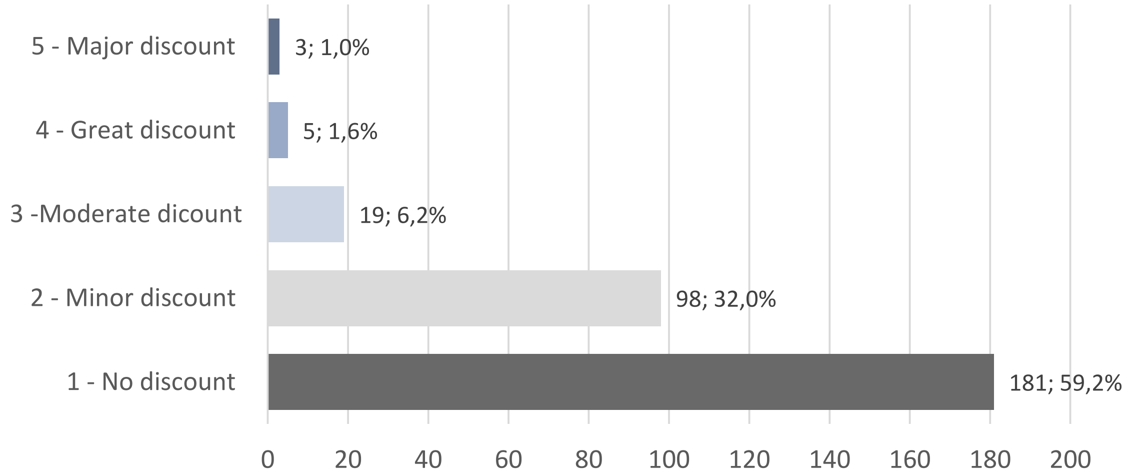

Figure 16: The rate of discount you can enjoy as a local inhabitant visiting cultural attractions/events/sites (N=306).

15. Tips to visitors about cultural attractions/events/sites

The question about the frequency of providing tips to visitors about cultural attractions, sites or events has a total number of 306 respondents. Almost a third of respondents (24%) is often providing tips to visitors and a tenth of respondents (10%) is providing tips very often. A half of respondents (47%) only sometimes provide tips to visitors. Ljubljana has multiple tools (VisitLjubljana, etc.) for providing tourist information about cultural attractions, sites or events (schedule, offer) to visitors. Tips to visitors from residents are usually intended for visitors' spatial orientation for finding cultural attractions, sites or events, and are most likely provided by resident living in close proximity to the city centre, where most of the cultural offer is located. In year 2019 and 2020 Ljubljana also posted the street billboards "5-minute walk to the culture" by which they wanted to promote the museums and galleries. Those are known as to be less known to the foreign visitors since they only seldom enter any of the Ljubljana museum and galleries. Instead they prefer to enjoy the street life of Ljubljana.

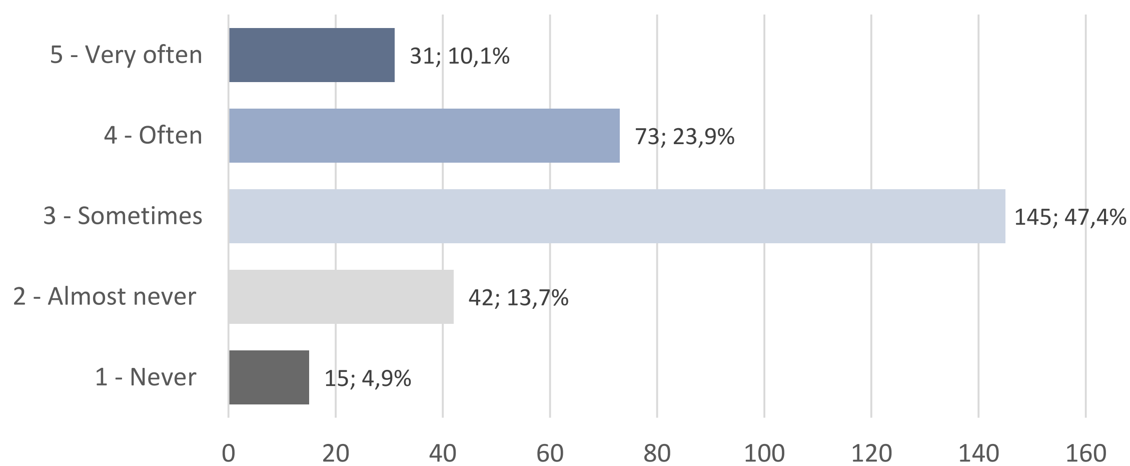

Figure 17: Frequency by which residents provide tips to the visitors about cultural attractions/events/sites (N=306).

16. Impact of tourism on local traditions

Total number of respondents is 302. Around 6% of residents (combined) of total number states that impact of tourism on local traditions is great (53%) or major (15%). 21% of residents is undecided about the impact of tourism onto the traditions. 8% argue the minor impact and only 3% of residents state tourism has a negative impact on local traditions.

Although Ljubljana is not so well known for folklore tradition, there are traditions, mostly connected to every-day life that can be perceived as important. Among those is the local market, also an architecture gem designed by Jože Plečnik, the gastronomy offer named 'Okusi Ljubljane' or the culinary festival 'Odprta Kuhna'. These locations or events attract both, domestic and foreign visitors, and provide the foreign tourists with the insight into the local lifestyle. The impact can be both positive or negative. Positive impact of tourism on local traditions shows in their maintenance and conservation, while negative impact shows in too many tourists attending such events.

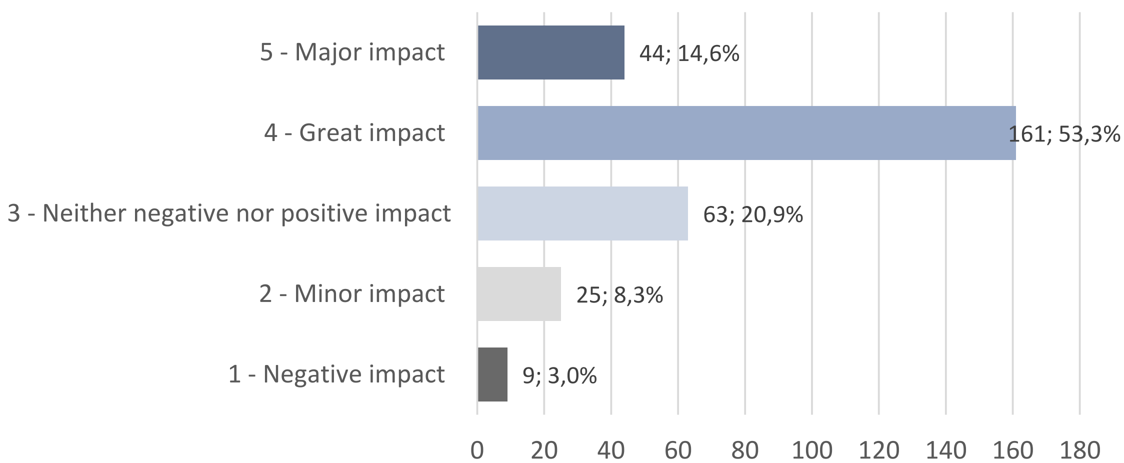

Figure 18: Impact of tourism on local traditions (N=302).

17. Impact of tourism-related nuisance

Impact of tourism-related nuisance has a total number of respondents 289. Respondents predominantly selected two categories, firstly, the category great impact (42%) and secondly neither negative nor positive impact (38%) of tourism-related nuisance. Only 9% of respondents state that tourism-related nuisance has major impact and the similar percentage of respondents (8%) selected category minor. Tourism-related nuisance, such as loud tourists, parties, disrespectfulness, garbage and so on have according to the annual surveys with inhabitants moderate impact on the local life. In a survey "Relationship of the residents towards tourism in Ljubljana" (CPOEF and JETL, 2018) residents in general reported a positive impact of tourism, but a few negative consequences were stated, such as crowded open spaces and squares (37%), crowded bars and shops (27%), garbage problem (13%), increasing conflict between residents and visitors (15%) and night noise as a result of tourism (19%). In our survey, half of the residents think that tourists in a major way interfere with their daily life. Mostly Ljubljana City Centre is the neighbourhood in which most of such "accidents" occur which is due to the fact that most music events, open street events, shows, and culinary offer takes place there. Hereby, we also need to state that Ljubljana is known for notoriously poor night life, e.g. clubs, bars. This is most commonly also one of the rarest elements of cultural offer of which quality is rated as poor (SURS, 2020).

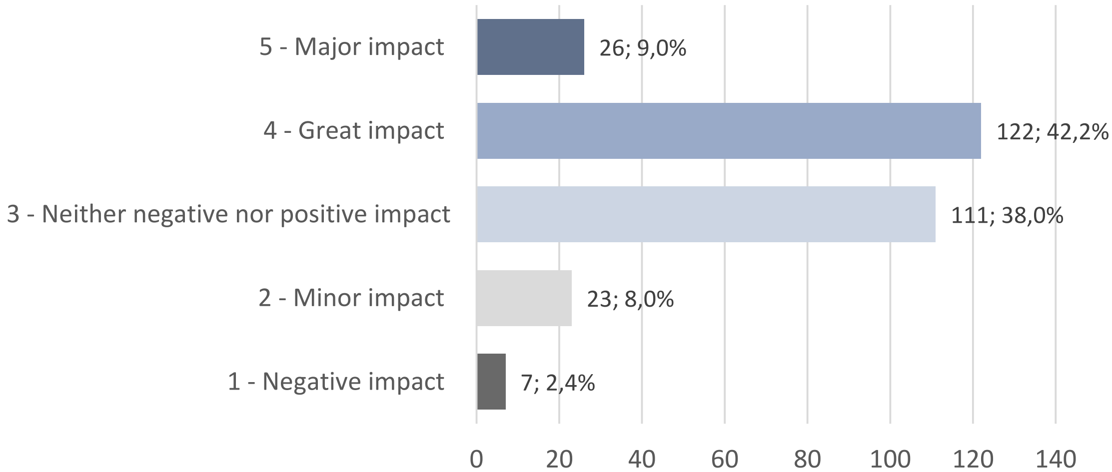

Figure 19: Impact of tourism-related nuisance (N=289).

18. Willingness to recommend visiting the case study area to others

Total number of respondents is 304. Residents are overall willing to recommend visiting Ljubljana to the others, altogether 79% would likely or very likely commit to it. Only 2% of respondents would not do that, however, we do not know the reason for that. The category "probably" was selected in 14% of the cases and "unlikely" in 5% of the cases. Overall, figure below emphasizes positive attitude when it comes to promoting the city by the residents.

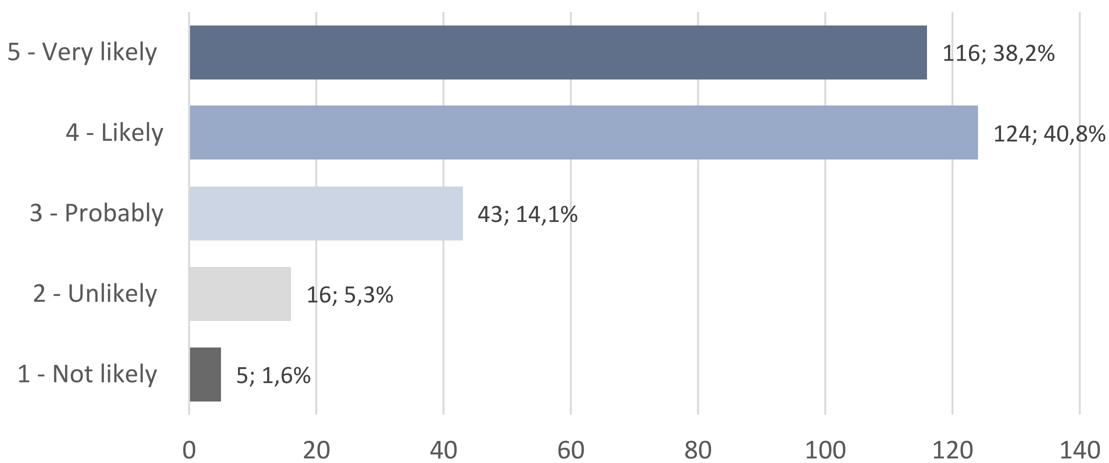

Figure 20: Willingness to recommend visiting the case study area to others (N=304).

19. Profit from cultural tourism by residents

In line with the question 11, also this question confirms generally positive perception and added value of cultural tourism for the city and its inhabitants. The tourism-specific characteristics of the city were most often mentioned such as increased diverse cultural offer and the fact that city would become more vibrant, diverse, lively, walkable and recognisable. Residents have also exposed added value of tourism such as more diversity, enriched gastronomy, city's wider European or even global recognition and higher quality of life, mostly connected to enriched knowledge of language, local offer, clean environment and socializing and networking. Some positive impact has been detected in economic aspect, namely increasing investments, employment and business opportunities and overall general tourism development. Some of the residents (34) had no opinion at all, showing possible lack of interest in cultural tourism and its positive or negative effects on social, economic and spatial aspect of development.

Table 5: Added value of cultural tourism for the city and its inhabitants.

	Highest frequencies	Lowest frequencies
Development in general	- better city promotion and recognition (16) - enriched gastronomy (12) reviving and respecting local - traditions and history (9)	- renovation of the buildings (1) - safer city (2)
Economic development	- employment opportunities (17) - enriched local offer of services (9)	- higher real estate prices (1) - higher value of collected taxes (3)
Tourism-specific development	- diverse cultural events (29) - increase and diversification of the cultural offer (25)	- increase in number of visitors (1) - promotion of the local food (2)
Social life	- higher quality of life (11) - openness and friendliness of the people in the city (10)	- increased sense of belonging to Europe (1) - broadening horizons (4)
Spatial development	- accessibility of the city (information, sites) (27) - diverse city (16) - walkable city (16)	- decreased quality of landscape (1) - proximity to natural areas (2)

Figure 21: Added value of the cultural tourism for the city as perceived by the residents.

20. Cultural tourism and Covid-19

306 respondents answered to the question about effects of Corona on cultural tourism or their taking part in cultural tourism. Figure below shows a significant decrease in visiting listed cultural attractions. Respondents were much less visiting (in descending order) theatre (54%), dance events (53%); nearly a half of respondents were much less visiting music events (51%), sport events with 49% and health sites with 48%. Only one tenth of residents enjoy cultural offer more than they did before Corona crisis. Lowest rated categories in descending order are townscapes (14%), Cultural heritage sites and buildings (12%), Historical sites and buildings (10%), cultural routes (7%) and restaurants and food festivals (5%).

Current Corona crisis had a major impact on tourism sector, resulting in decreasing number of tourists and visitors. Constantly changing measures for controlling medical crisis, disabled a variety of cultural activities or moved their activities on-line. One fifth of the population has not change the pattern of their behaviour regarding enjoying the cultural offer, lesser negative change was concerning the outdoor cultural activities, such as visiting cultural routes and townscapes; or admiring the cultural heritage sites and buildings. As shown in the interviews we did for another project about the impact of COVID-19 on urban tourism, the cultural offer providers are adapting their offer, e.g. galleries offer on-line exhibitions, theatres put their shows on-line as videos (live or archived), culinary offer can be enjoyed at home if offered as delivery service etc. For some population who enjoys better in the safe heaven of their home, can enjoy now more variety in the offer, e.g. opera shows are available from the home couch at a cheaper rate than on location. However, for people who prefer live experience in the proper environment, this of course, is a huge downside.

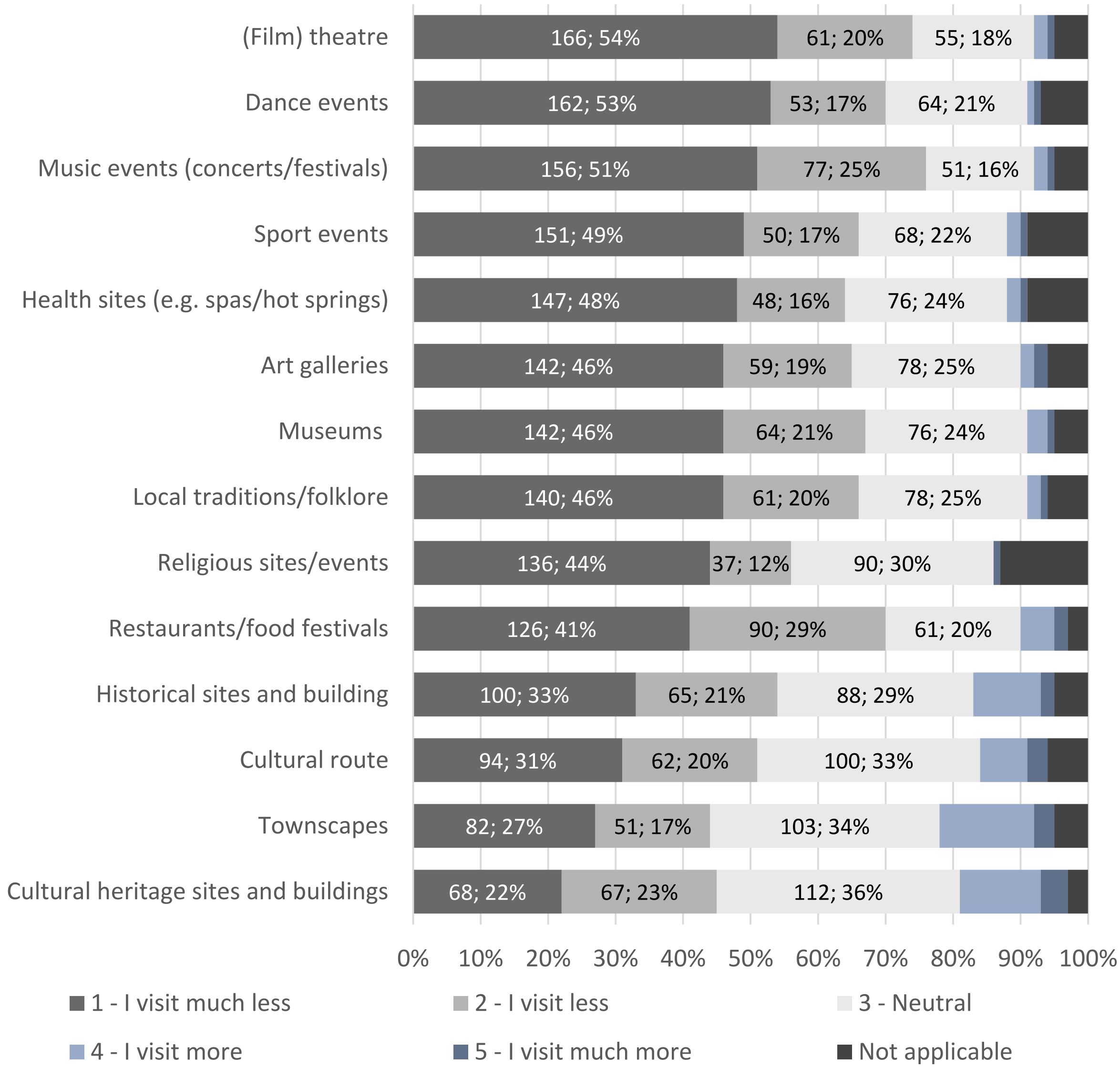

Figure 22: Effect of COVID-19 on visiting the cultural sites (N=306).

SURVEY WITH BUSINESSES/ENTREPRENEURS

1. Methodology

Used method of sampling

The survey with the companies was carried out after we finished the surveys with the residents and the tourists. This was done due to the following reasons: the capacities of the SPOT team are limited, thus we were not able to carry out all three surveys at once, especially, since we planned the field work for two of them. In addition, we have also spent quite significant time to translate and adapt the questionnaire to Slovene language due to its complexity and length. We have created on-line questionnaire on the 1ka portal and a printed version of questionnaire, the later in four different versions: for tourist service providers in general, for cultural attractions and institutions, for hospitality sector (bars, restaurants) and accommodation providers.

Introduction of the survey to target groups

We published the questionnaire on-line in October 2020 when the COVID-19 pandemic started to worsen. Thus we have cancelled the field work which was anyway impossible after the mitigation measures became stricter (temporal closure of bars and restaurants, a night curfew from 21:00-6:00, prohibition of public gatherings and events, limited number of people in public and private space (for now only up to 6 persons), restricted movement to one's municipality borders). Finally, the lock down started at the last week of October. Altogether we have sent e-mail invitation to the survey to approximately 150 potential respondents, in addition, we also asked for assistance the Tourism Ljubljana, the sector, responsible for cultural tourism, and the Tourism and Hospitality Chamber of Slovenia (TGZS).

Number of respondents per target group

Since the initial response to the questionnaire was minor (the link was opened 60 times, only 10 respondents finished the survey in full) in the first four days, we have boosted the responses via the phone contacts. To gather more answers, we have called the respondents to make sure they have received the invitation and to invite them again or remind them of the ongoing online questionnaire. Due to the circumstances of the virus crisis, many of the potential respondents are currently not operating and are thus unavailable. As of the current stance (latest data of the November 6th), the intro page was opened 157 times (131 times through direct link, 16 times through Facebook) and the questionnaire was opened 64 times. Most of the surveys are fully filled until page 3, this is until half of the questions which focus on cultural tourism. Altogether we have selected 40 surveys (out of 43) of which 27 are fully filled in and the rest are half filled. Some of them skipped the questions about COVID-19, some of them found all the questions about the cultural tourism overwhelming. Regarding the target groups, 13 respondents are accommodation providers, 13 are a cultural or tourist attraction, 2 are restaurants and bars and 13 fall under category “other”. Among those are tourist guides and travel organisers souvenir shops, a conference venue and a culinary market organiser.

2. Results of the survey for businesses

I General characteristics

1., 2. Location and type of the business

Half of the respondents (20) operate only in the city centre of Ljubljana, where the tourism activities are most concentrated. Further four (10 %) operate both in the city centre and other city district(s) and only one (2.5 %) is based outside of the city centre. Among 40 respondents, 24 (60 %) operate in the Center district, two in Šiška and Vič and one in districts of Bežigrad, Trnovo, Rožnik and Šentvid. The exposed districts correlate with our findings about the most touristified quarters in Ljubljana from the project MESTUR (Marot et al., 2020). Two providers (8%) secure services at any requested location in the city. 15 (38%) did not provide the data (postcode) on their location as they either do not have a location-based business (mostly tourist guides) or have not answered to the question. We have additionally asked the respondents on the number of locations they operate and ten out of 40 respondents operate in more than one location.

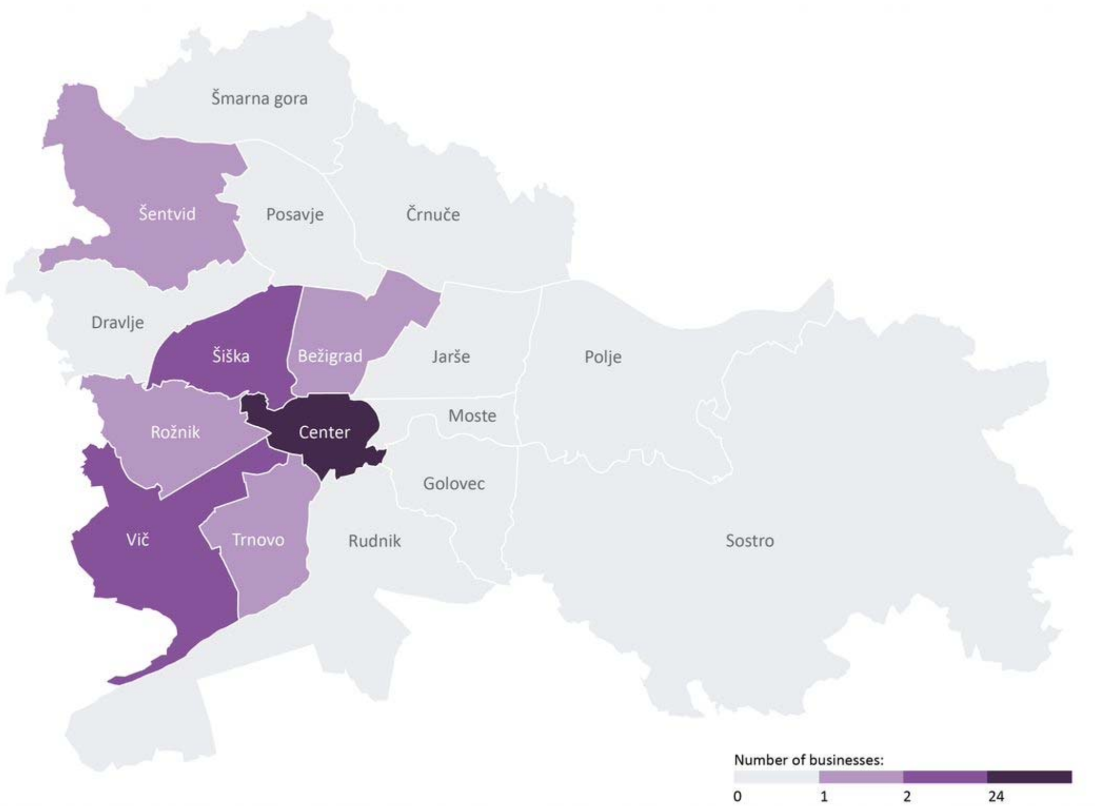

Figure 43: Location of the businesses (N=40).

Among surveyed businesses only two respondents are a restaurant, café or bar. This is due to the Covid-19 lockdown which did not allow for the on-site performance of the survey. Instead, the survey was only performed online and many of targeted facilities were not operating and/or were difficult to contact, motivate and engage on-line. Other categories of the business relevant for the survey are evenly distributed; 13 (33%) respondents represent visitor attractions, sites or activities (32%), further 12 (30%) are accommodation providers and the rest (13; 33%) categorised themself as 'Other'. Among 'Other' were five tourist service providers (e.g. tourist guide, tour organizer), three shops, a culinary market and a conference centre.

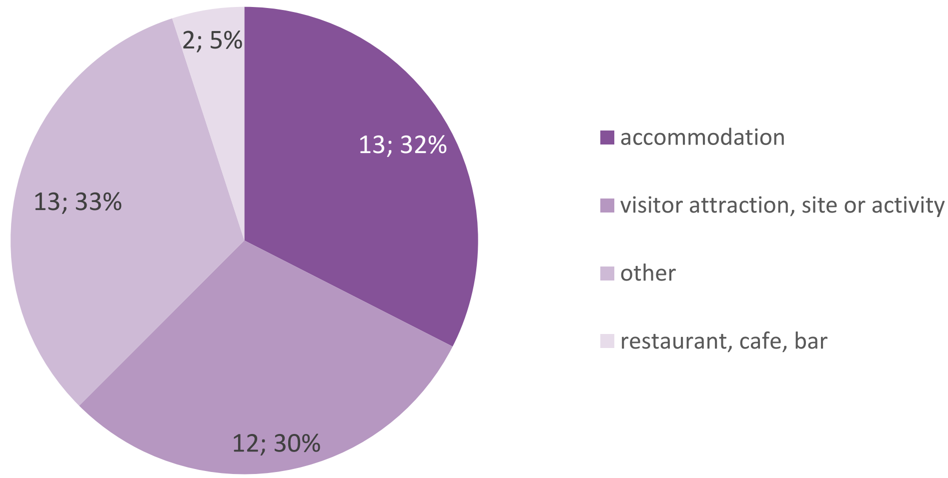

Figure 44: Respondents according to the type of business (N=40).

3.-11. Information about visitor attractions[3]
In this section of the questionaire only visitors' attractions were targeted. Among thirteen respondents that answered the question of how they would best describe their business, 8 choose museum, followed by art gallery, cultural heritage site and other (5 respondents each). None of the respondents in our survey were representing a visitor centre, theme park, religious site, farm or vineyard.

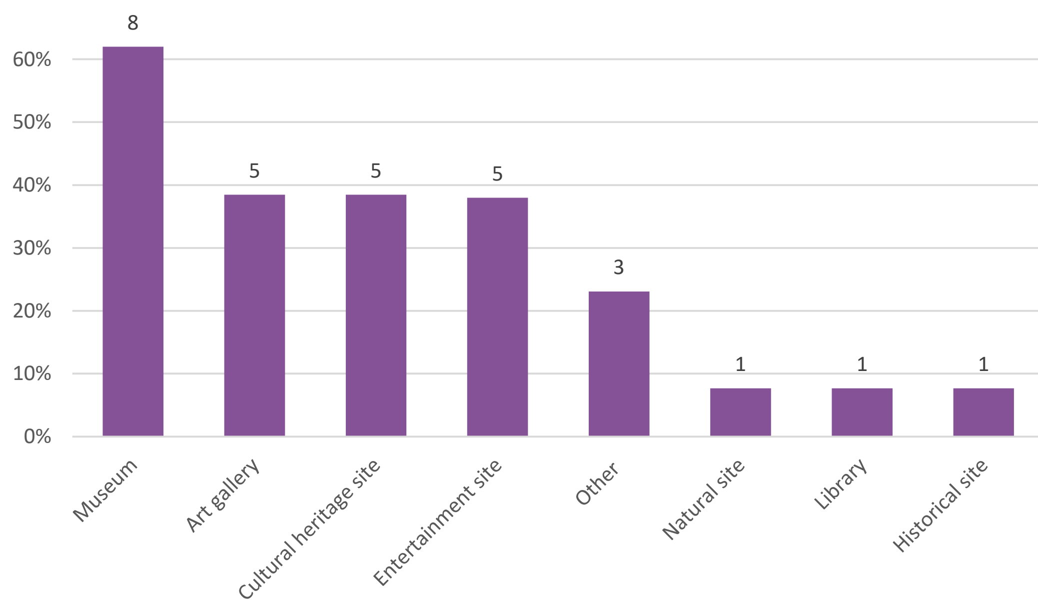

Figure 45: Types of visitors' attractions included in the survey (N=13).

For all the tourist attractions (8) that reported their admission fees, the cost for a day ticket visit is below 25EUR. One site has free admission, five attractions can be visited by purchasing the ticket in a value between 5 and 7 EUR, one 10 EUR and one 13.2 EUR. The latter is the most expensive admission

[3] Due to the low number of respondents for these questions we have not prepared charts for all questions. Instead we report results only in the text.

among all visitors' attractions included in the survey. Based on our knowledge, otherwise, the most expensive cultural offer in Ljubljana are tickets for concerts of the world reknown musician at the Ljubljana festival and tickets to the Opera and Ballet which costs between 10 to 45EUR per show. Only two respondents told us about their estimated revenue per visitor. Both attractions reported the values 4.5 EUR and 5.0 EUR which both belong to the lowest category of visitors' revenue.

As the questionnaire had several questions intended only to a part of respondents, the already small sample in some cases provided result that are insufficient for further statistical analysis. Only two answers were collected about the average annual number of visitors (5,000; 110,000) and three answers about total visitor capacity (35,000; 110,000; 150,000). Only two answers were collected on the size of facilities (150m^2; 200m^2) and size of the site's open area (gardens, parks) (300m^2; 100 m^2). This data does not allow any statistical generalisation.

The average time spent at as tourist attraction is relatively short, as it is just one hour in the case of 4 respondents, and two hours for 2 respondents. This means an average visit of 1h 20min.

Families and children are the most targeted types of visitors, as these categories placed on first two spots of most important target group of 75 % of respondents. Adults were not selected as important category in most of the business. Among 'other' important visitor attractions' representatives most often mentioned students (5) and pensioners (2).

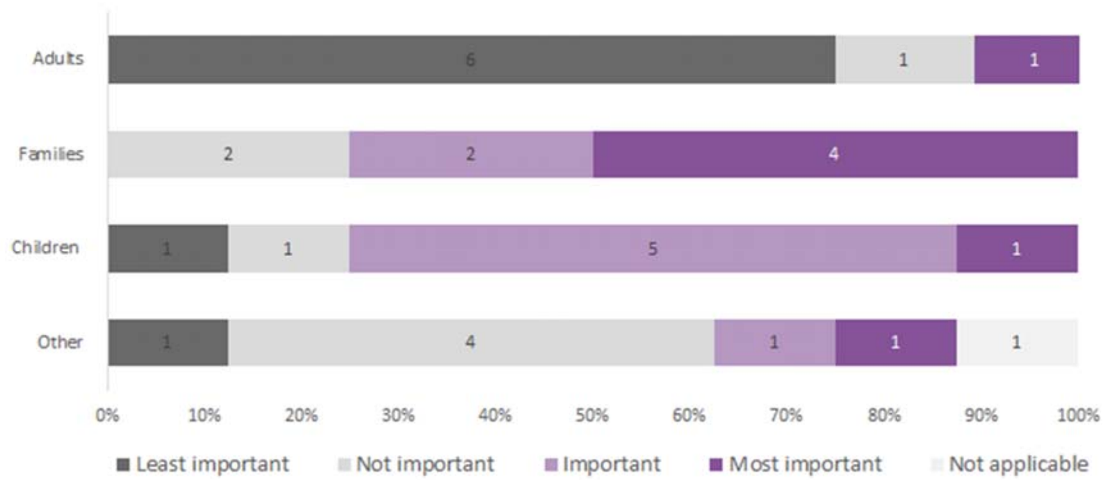

Figure 46: Importance of an individual type of visitors for the attractions (N=8).

12.-15. Information about accommodation

Eleven accommodation providers answered this part of the questionnaire. Among them majority are hotels (4 high and 4 mid-range), followed by Airbnb (3) and hostels (2) (question permitted multiple answers). Other categories are not represented, which is expected as there is only one camping facility in Ljubljana and there are no tourist farms and only one mountain lodge which did not respond to the questionnaire. Share of Airbnb is smaller than that of hotels also because such facilities are much harder to contact and were also not among the main target groups of the survey.

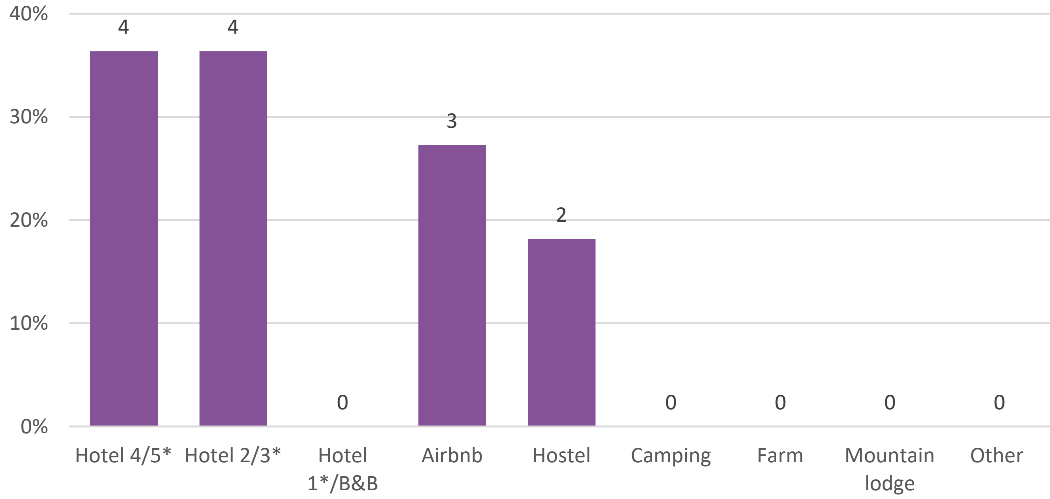

Figure 47: Accommodation type (N=11).

Total number of beds provided in the accommodations is evenly distributed from small venues like apartments turned into Airbnb to large hotels with more than 200 permanent beds. In comparison to other same size city tourist destination, Ljubljana does not have so many larger accommodation venues (the number of big hotels is less than 10) which makes it problematic in the case of the congress tourism. Together, there are 23 hotels inside and further 20 outside the city centre of Ljubljana. Together they have less than 3,000 hotel rooms or on average 70 rooms per hotel. Consequently, several construction and renovation projects took off before the pandemic and are planned to increase the hotel capacity of Ljubljana to 4,100 hotel rooms by 2023 (Tourism Ljubljana, 2021a).

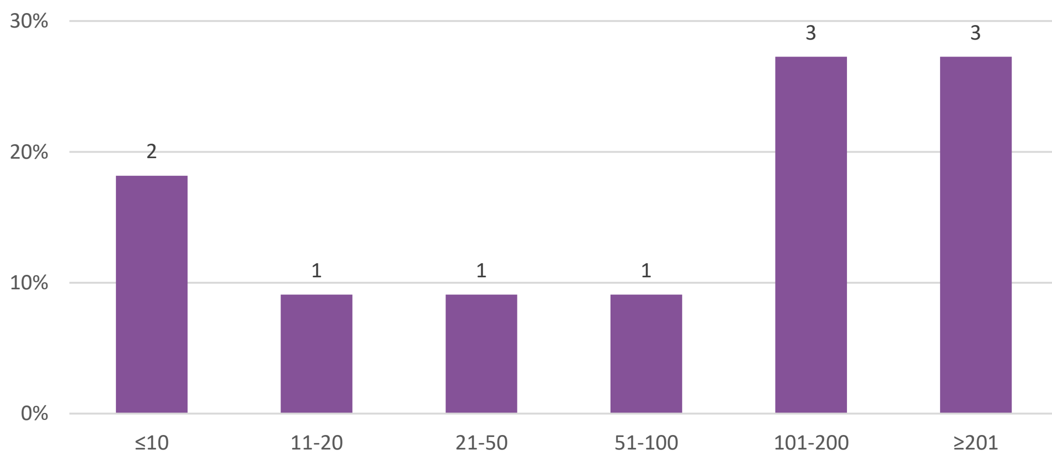

Figure 48: Total number of permanent beds (N=11).

All accommodations are open year-round and roughly half of them have good occupancy rates in all seasons. It is evident though, that Ljubljana is visited the most in the summer, when all 11 accommodation providers record occupancy rates above 70%. The average duration of tourist stay however is quite short, which is not surprising for an urban destination. Most (80%) accommodations reported an average stay of at least two nights (seven report 2-night and one report 3-night stays) and the rest bellow two-night stays (1.2; 1.5 nights). Average stay of tourist in Ljubljana, calculated using this data, is 1.97 nights, so rounded up accounts for 2 full nights. This is very close to the average stay in city of 2.0 nights as measured and reported by Statistical Office of Slovenia and Ljubljana Tourism (2021b).

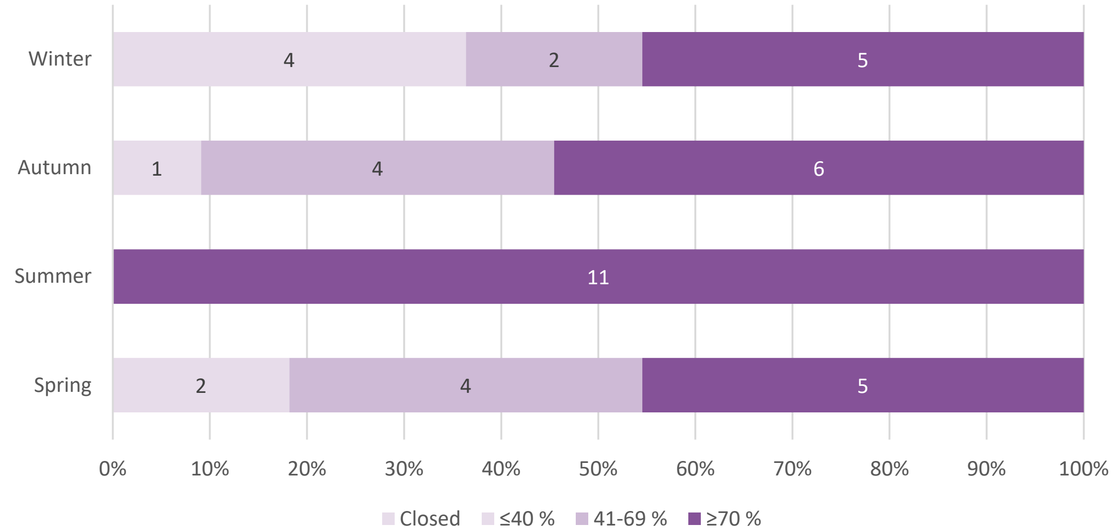

Figure 49: Estimated occupancy rate at different seasons (N=11).

16. Ownership of business

Ownership of surveyed businesses is very diverse. Question allowed multiple answers and largest share represent private businesses (38%), followed by public sector (21%) and family businesses (18%). 10% of companies are part of an international and 5% of a national chain. Six respondents (14%) categorise themselves as 'other', they represent NGO's, clubs, cultural societies or independent workers in culture. Among the public businesses which participated in the survey are mostly cultural institutions, like museums, galleries, among private ones are the hotels and accommodation suppliers. As visible from the survey, Ljubljana does not have many hotels that are part of the international chains, such are only Austria Trend (Austria Trend), InterContinental and Holiday Inn Express (IHG), Mons (Four Points by Sheraton; Marriott), Radisson Blu Plaza (Radisson) and Slon (Best Western).

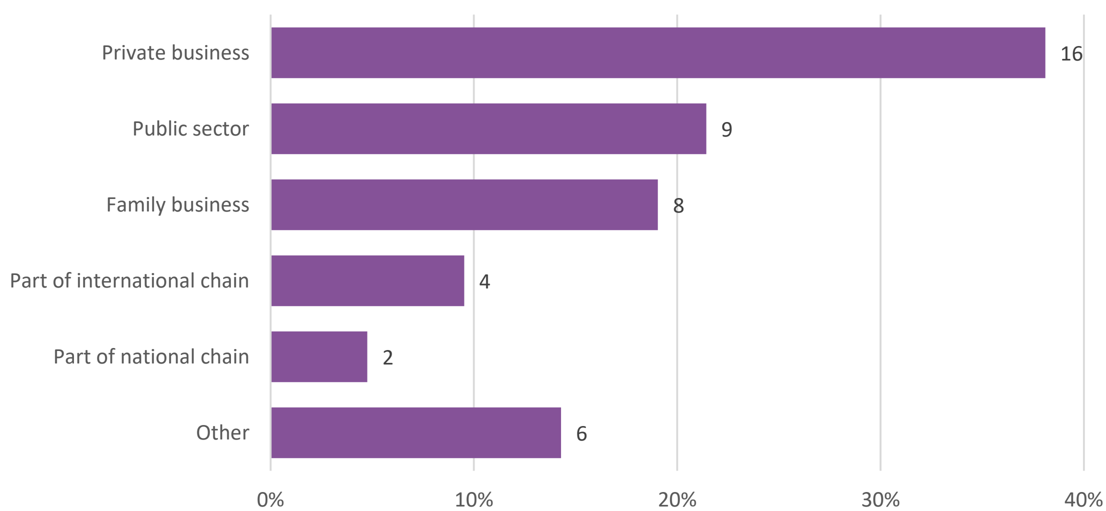

Figure 50: Ownership of business (N=40).

17. Foundation of business

Most of the businesses (55%) are over 10 years old, the oldest being established in 1821. Only a tenth are less than three years old, youngest being established in the same year in which the survey was conducted, thus in 2020.

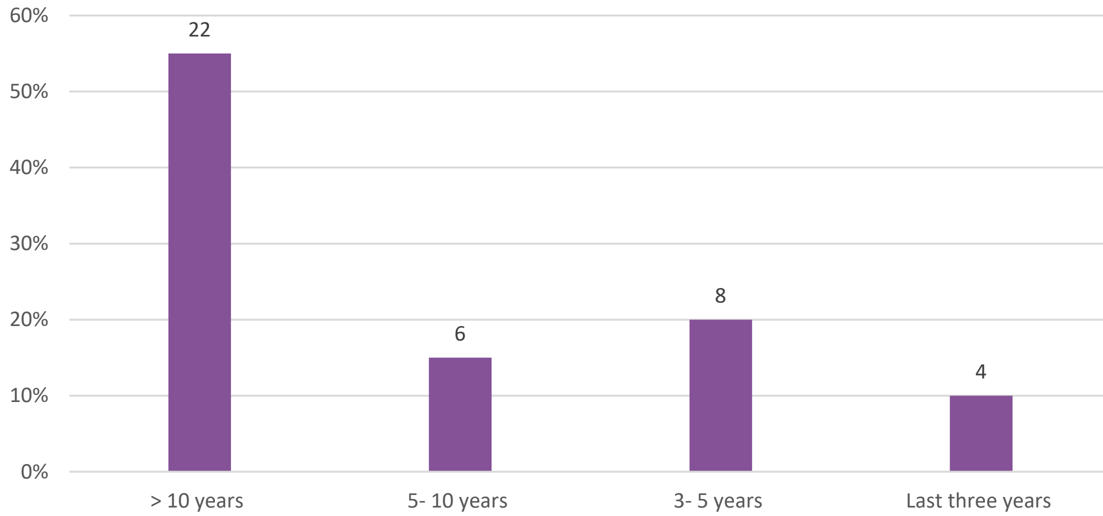

Figure 51: Foundation of business (N=40).

18., 19. Seasonal performance of business

Contrary to the hypothesis about the seasonality of urban tourism, number of employees remains mostly stable throughout the year. Only three businesses out of forty change the number of full-time employees (FTE) between seasons and the number of FTE only slightly decreases in winter. Around 40% of business have less than five employees, 30% between five and 15 FTE and another 30% employ more than FTE. Three largest businesses employ between 100 and 120 FTE. However, one needs to take into account that these numbers do not present the student work force which is employed via the special labour law arrangement and does not account into FTEs.

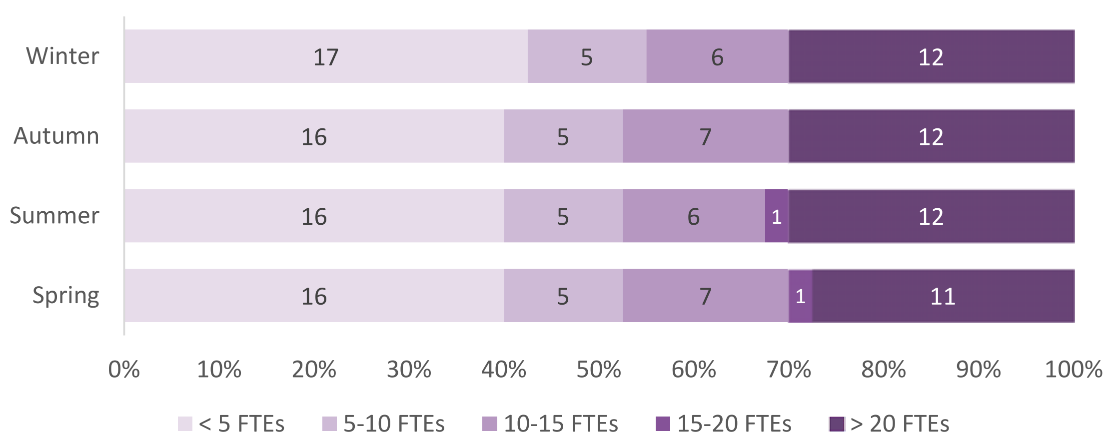

Figure 52: FTEs (Fulltime-Equivalents) work in business (including family members) during the different seasons in a normal year (N= 40).

Large majority (83%) of businesses records busiest period in summer which is followed with spring as a distant second (53%). Less than a quarter of businesses chose winter as a busy period and only one chose school holidays. Namely, Ljubljana is not a typical school holiday destination since families prefer to other go skiing in the winter or to the coast in the summer. Indeed, winter period, except for the December, is the only season which does not attract many visitors to Ljubljana. In the years up to 2019 the number of visitors was slowly increasing also out of the summer period, and before COVID-19, there were a sound number of visitors in Ljubljana between March and October, the off-season months being filled-in by the congress tourists.

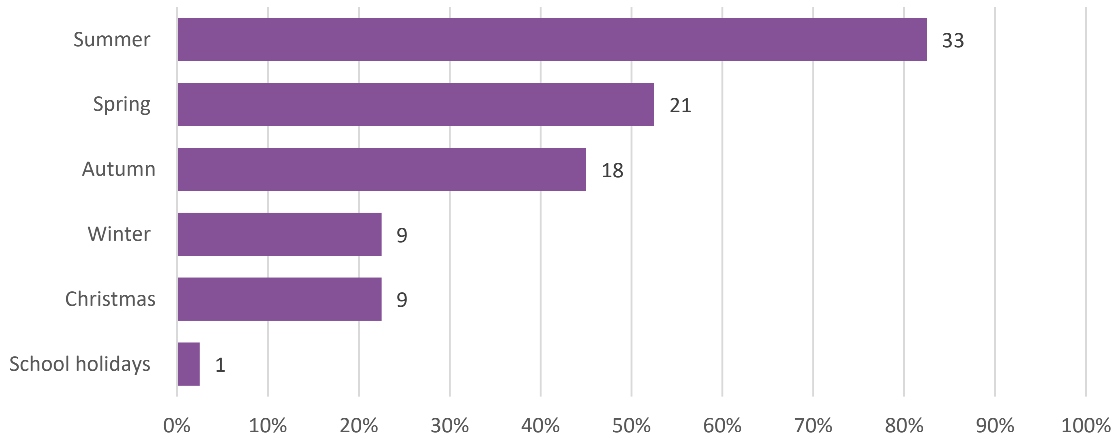

Figure 53: Busiest times for business (N=40).

20.-21. Origin of visitors

International visitors are the most important visitors for surveyed businesses. Visitors from EU countries are considered as the most important foreign tourists (ranked so by 30% respondents), followed by non-EU visitors (22%) and international visitors from neighbouring countries (10%). Last category might be confusing though, as all of the neighbouring countries of Slovenia are in the EU. Among visitors from Slovenia, local visitors from Ljubljana Urban Region are significantly more important than other domestic visitors (30% ranked local visitors and 10% ranked domestic visitors as most important), but on the other side this category of visitors also has the highest share of rankings as least important (47%).

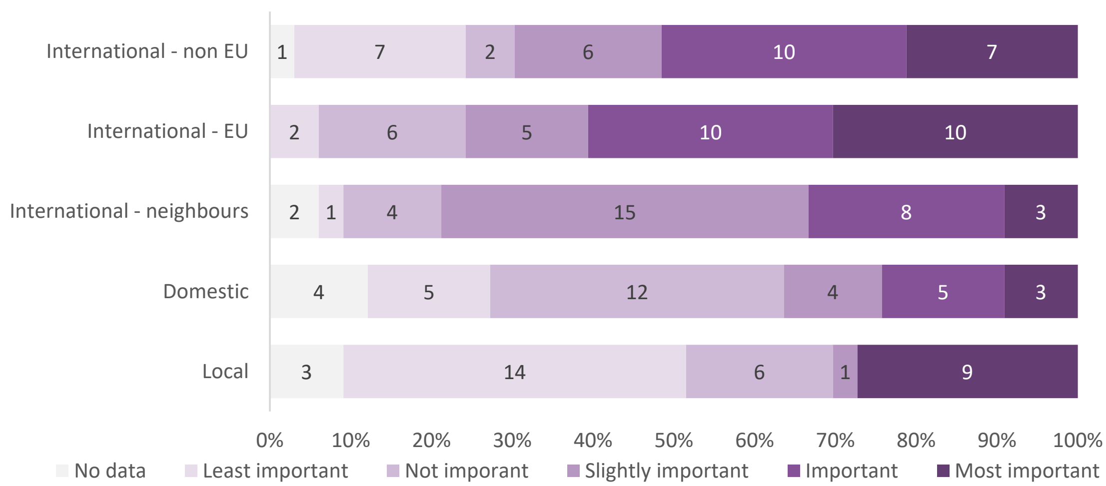

Figure 54: Origin of visitors, ranked from least to most important (N= 33).

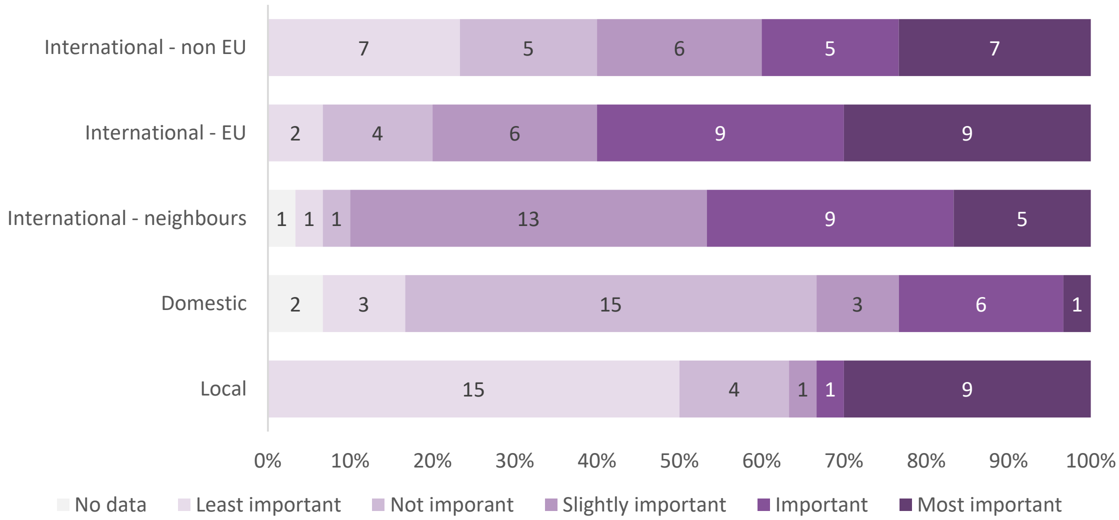

Figure 55: Origin of targeted visitors, ranked from least to most important (N=30).

One can say that Ljubljana as destination is attracting more international visitors, which is also seen in the ratio of income between domestic and foreign tourism. Around 60% of businesses (27 answered the question) make majority of income by foreign visitors. While 30% of business make revenue almost exclusively from foreign visitors, this share is only 7% for businesses focusing on domestic visitors.

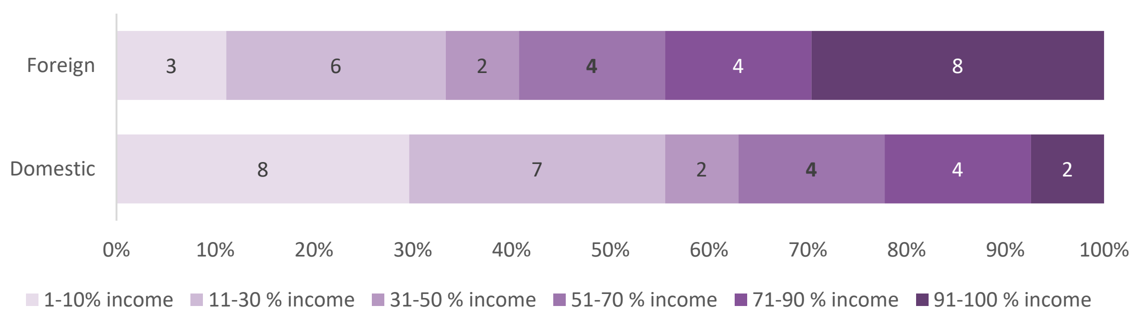

Figure 56: Share of income from foreign and domestic visitors (N=27).

22. Promotion channels

Businesses use multiple promotion channels as all of the proposed categories recorded usage by at least 30% of surveyed businesses. The most popular are social media (76%) and word of mouth (73%). We also asked for the type of word of mouth promotion businesses take advantage of, and results show that recommendations from friends and acquaintances are the most important (64%), followed by recommendations from locals (48%), while recommendations in accommodations only had a small share (12%). This corresponds with the conclusion from previous research in which we noticed that accommodation and tourist offer/attractions provides are not well connected to benefit from each other promotions. High share of businesses also promotes using internet websites, partner website and TripAdvisor. In the category 'other', respondents mentioned the official website of Ljubljana Tourism, video promotion, tourist fairs, regional and national associations of tourist guides, printed flyers and event programmes.

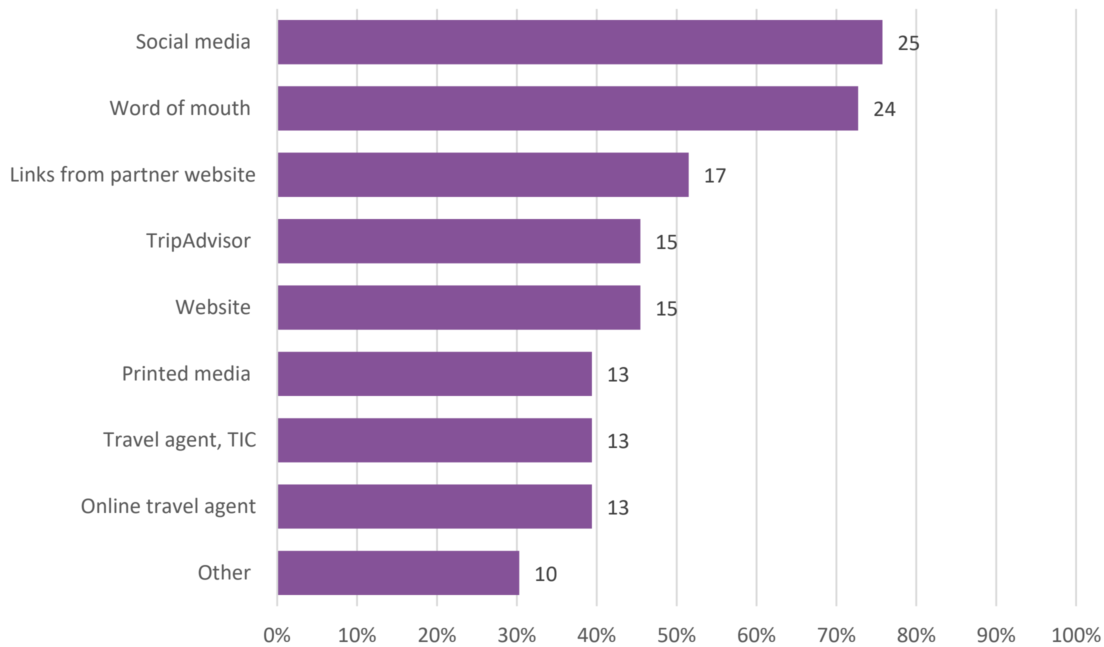

Figure 57: Promotion channels of business (N=33).

23., 24. Performance of businesses

The good performance of tourism in the City of Ljubljana, and the constant growth of urban tourism in the last few years is also evident in the trend of performance of businesses as only 1 respondent had a negative and none had a very negative performance trend in the last five years. A high share of 14 out of 33 businesses that answered the question (representing 44%) estimate its performance trend as very positive and further 13 (41%) as positive, so altogether 85% businesses accounted good business performance. Most business feel the number of tourists visiting them is high (13 out of 23 or 57%), however none of them feels it is too high, by which we can indicate there is still potential for further growth.

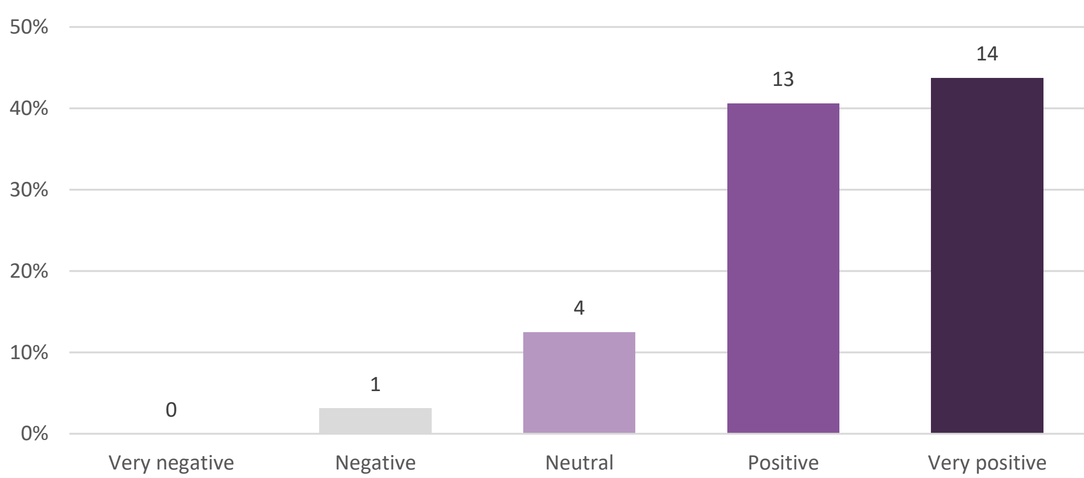

Figure 58: Business performance trend in the last five years (N=33).

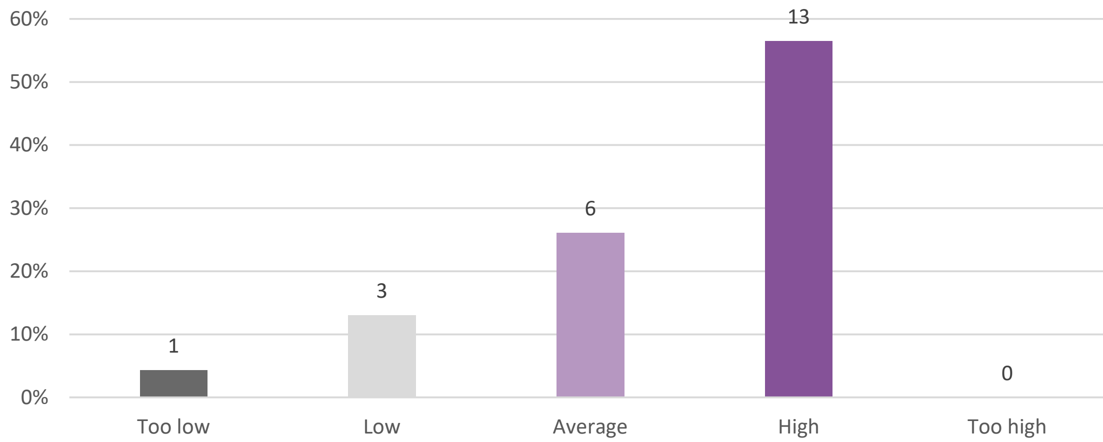

Figure 59: Feelings about the number of tourists visiting business every year (N=23).

II Cultural tourism

25. Cultural tourism themes in business

Surveyed businesses (27 answered the question) cover a wide range of cultural themes, as all themes but religion are offered from at least one of them. Most represented are history (11 respondents), heritage, artwork (both 10) and architecture, urbanism and townscapes (9). Low share of businesses offers folklore and local traditions (3), film (4) and dance contents (5) and 4 respondents offer no cultural activities at all.

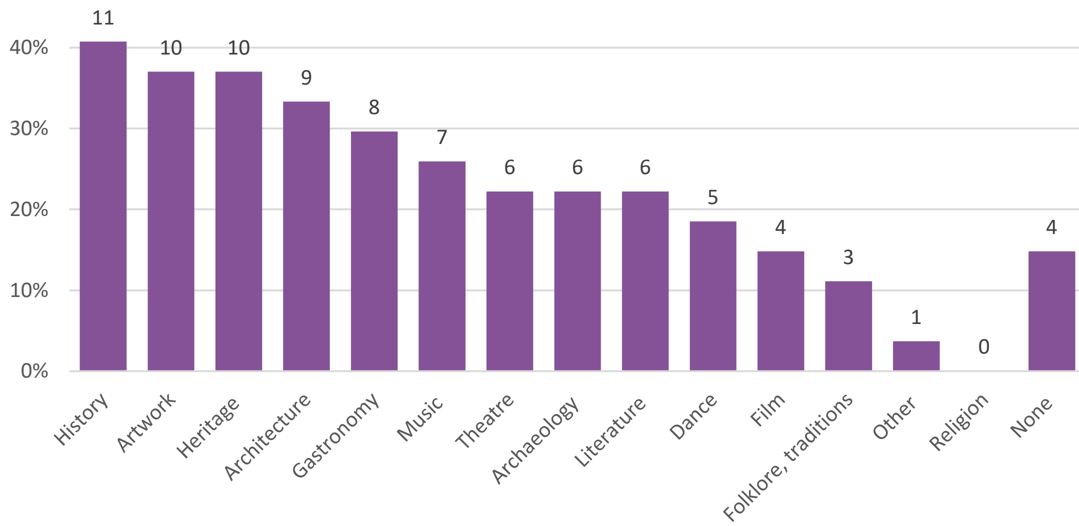

Figure 60: Cultural themes business offers (N=27).

Interestingly, the data on the most important cultural theme of the businesses provides a different view on the cultural offer. Heritage represents the most important offer in largest share of businesses (7 out of 23 respondents), followed by gastronomy (4), architecture, urbanism and townscapes (2) and history (2). This mostly corresponds with the concept of the classical cultural tourism. Only religion, literature and film were not selected as the most important cultural themes, indicating a wide and diverse cultural offer by surveyed businesses. This can be confirmed by the fact that 27 of respondents selected at least once one of the 14 categories.

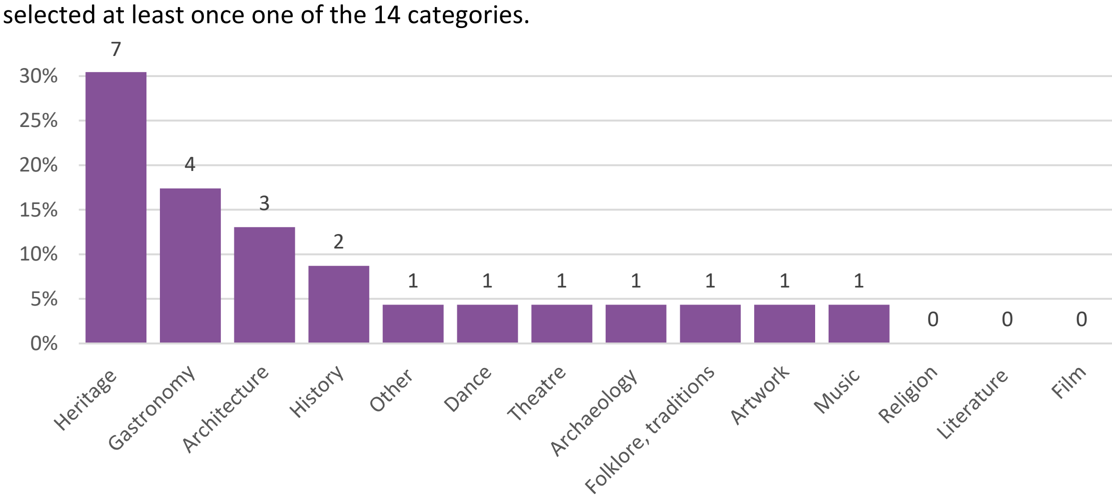

Figure 61: Most important cultural theme business offers (N=23).

26. Cultural tourism themes to be further developed

The question about which cultural themes should be (further) developed was of open nature. Businesses themselves want to develop topics as gastronomy (5 answers), music (2 answers), dance and art. Five businesses want to expend their geographical area coverage of operating or improve their offer. As cultural themes that should be further developed in Ljubljana, businesses suggested gastronomy, music, prehistoric heritage, festivals, industrial heritage, urban culture and cultural activities in public space. Two answers want to see cultural offer more developed in the centre of the city while two other want to see it developing throughout the city.

27. Statements on cultural tourism in Ljubljana

Respondents (27) mostly agree with all ten statements on cultural tourism in Ljubljana. The largest number (23 out of 27) agree or strongly agree that Ljubljana has a lot of potential for further development of cultural tourism. This is also the only statement no one disagreed with. With further five statements around 20 respondents agreed, those are: "It is important cultural tourism in present in the area", "Government should invest in cultural tourism", "Government should businesses developing cultural tourism", "There are still unutilised potential cultural attractions" and "Tourist numbers should be higher". On the last statement four out of 24 respondents disagreed. With the rest of the statements roughly half of respondents agreed or strongly agreed, however only a few have disagreed with them. These statements are: "Tourist flows should be regulated", "There is a good diversity of cultural attractions in the area", "There are enough cultural attractions" and "Cultural tourism is well developed". We can conclude that respondents are aware of the potential the area has and are mostly focused on its further development. They are less impressed by current cultural offer and do not see the need to downsize or regulate the growth of tourism in the area.

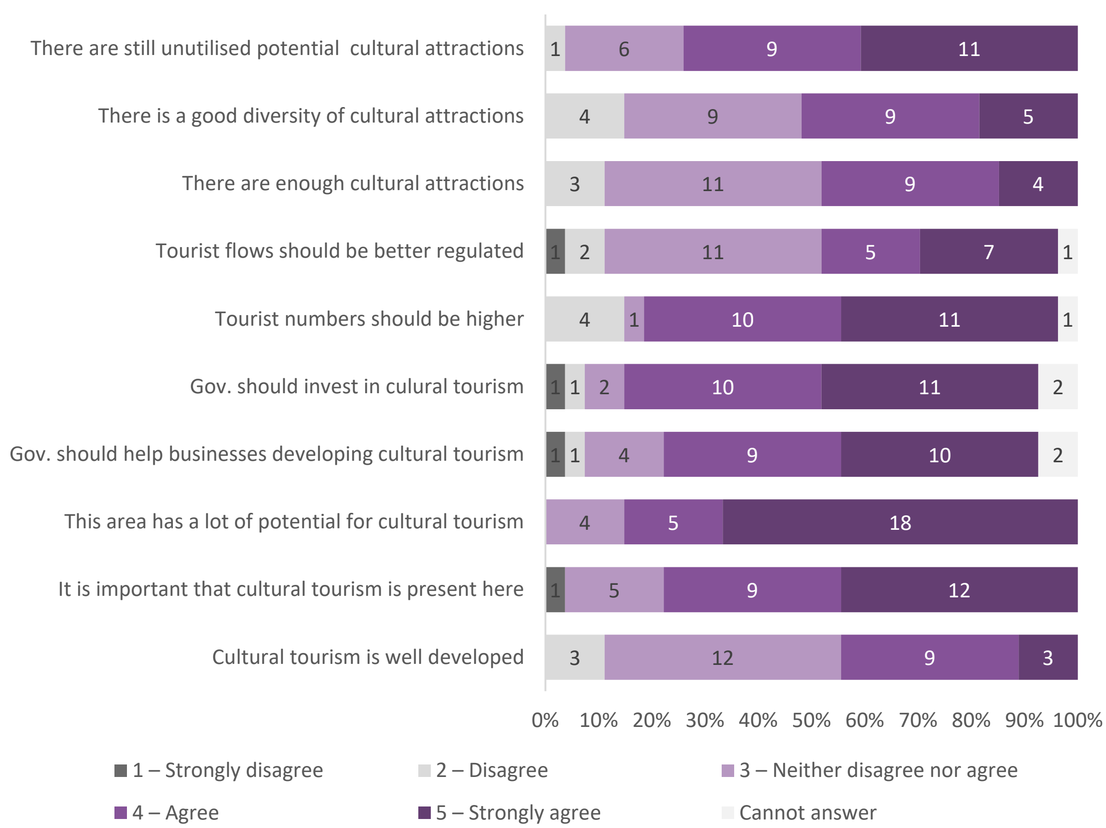

Figure 62: Dis-agreement with statements about cultural tourism in Ljubljana (N=27).

28. Types of tourism and visitors received

Couples, solo travellers and special interest tourist are the most likely visitors of the surveyed businesses. First group recorded 97% and second 89 % of combined votes to 'likely' or 'very likely visit' the respondents. High share of special interest tourists might also be result of the survey sample, as most of the businesses offer theme of visitor group specific content. Following are families (62 %) and business and work travellers (54 %). Eco-tourism has a very low share of likeliness to visit (23 %). On one side, this is not surprising since urban tourist destinations are usually not among the eco-tourism destinations, on the other, there has not been much done in regard to eco-tourism development in Ljubljana. Surprisingly, also mass and group tourism (16 %) have not scored high, having a very high share of very unlikely or unlikely probability to visit them (69 % combined).

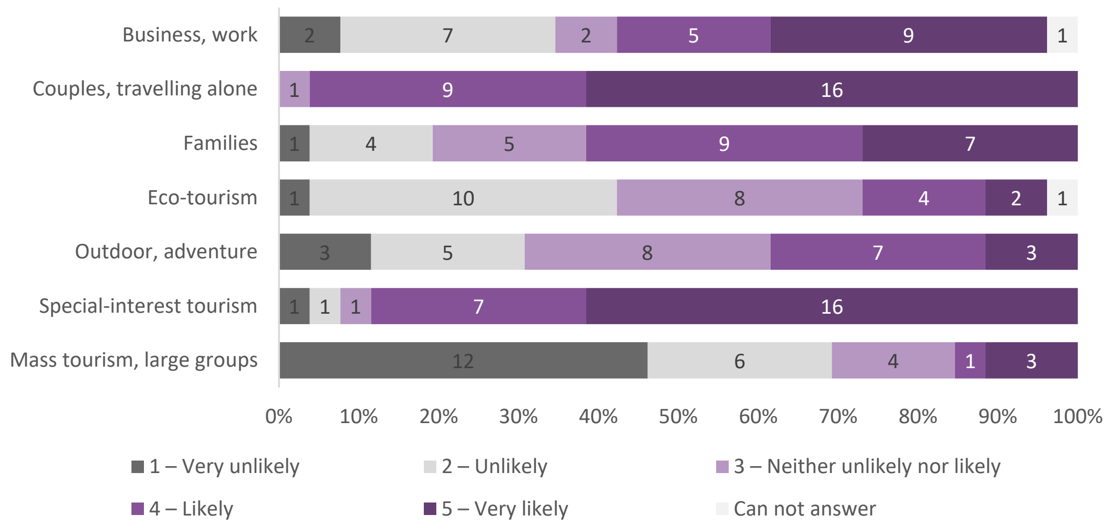

Figure 63: The likelihood the business is visited by specified types of tourists (N=26).

29. Characteristics of received visitors

Respondents (27) in general agree with the importance of cultural offer for their visitors, especially in regard to experiencing the local culture and traditions. Visitors also ask businesses about recommendations on cultural attractions. Most respondents (17) also agrees or strongly agrees that the visitors visit Ljubljana because of its cultural appeal. However, only 11 believe their visitors spend considerable time visiting cultural attractions and even less believe that they are prepared to spend extra money to support the local economy. Last statement is the only one that more respondent disagreed (10) than agreed to (6).

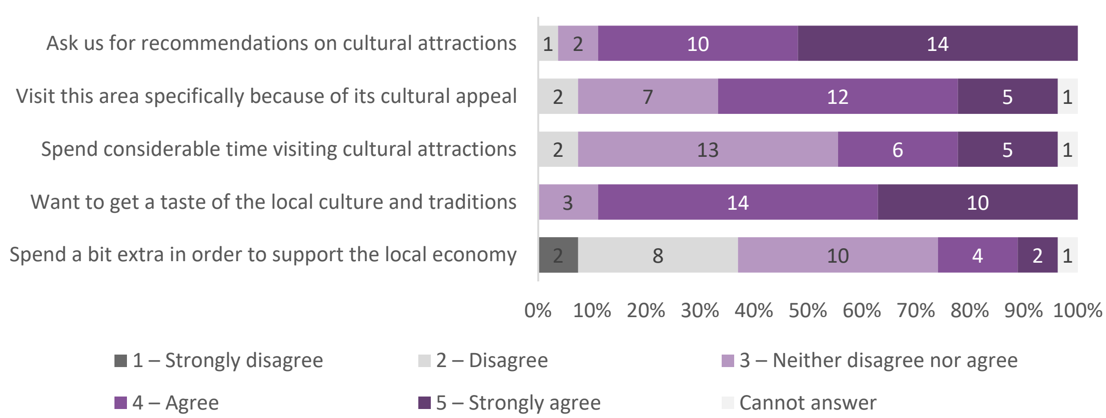

Figure 64: Dis-agreement with statements about characteristics of their visitors (N=27).

30. Most important development areas for destination

Businesses (26 of them) ranked the three most important investment areas of the eight proposed ones regarding how much economic improvement of cultural tourism in Ljubljana they can achieve. Results clearly shows that promotion and marketing is currently underperforming and is seen as the most important by the business. 81 % has ranked it in top three and 23 % as the most important. Same share ranked information provision to tourist as the most important, but combining all rankings events achieved a higher share of top three placements (62 %; 53 %). Other investment areas received fewer top placings and are seen as something to be immediately improved. These categories include attractions, public transport (both 31%), infrastructure (24%) and gastronomy (16%). For the selection of the answer "other" we got no specific explanation.

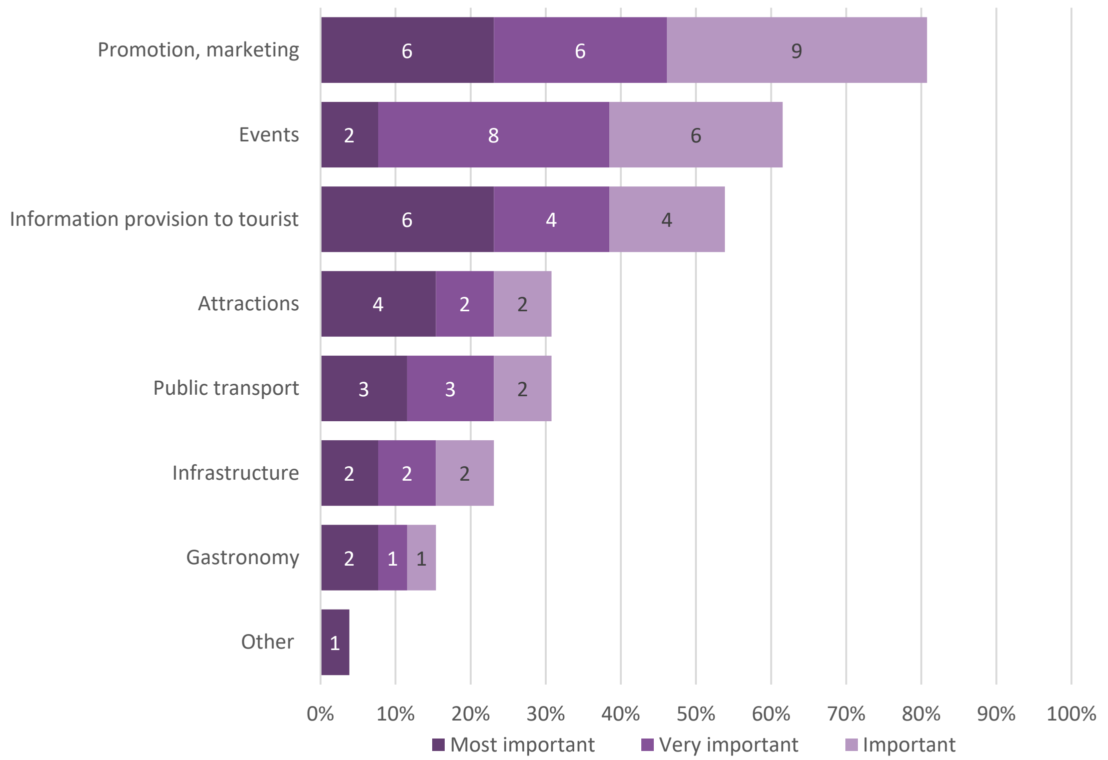

Figure 65: Most important economic investment areas to improve cultural tourism in Ljubljana (N=26).

31. Cooperation with other tourism businesses

Most of the 26 businesses cooperate with other tourism businesses in the area, as only 23 % of respondents reported no cooperation. Most common types of cooperation are joint activities (38 %) and lobbying at public authorities (27 %). Other activities, like joint purchases or buffering tourist flows are done only by some of the businesses. One respondent has provided that among other activities they do jointly with other businesses is provision of a platform for promotion and presentation. This was reported under category "other".

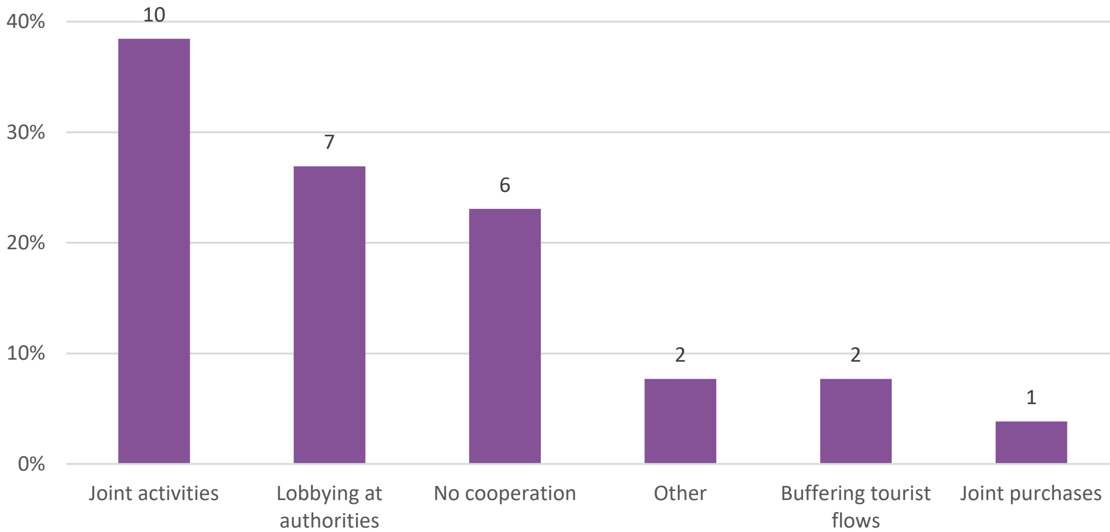

Figure 66: Cooperation with other (tourist) businesses (N=26).

32. Cooperation between business, tourist businesses in general, and the cultural sector

The 26 respondents evaluate that there is moderate level of cooperation between them and the cultural sector (53 % agree or strongly agree with the statement and 27 % disagree) as well as there is general cooperation between tourist businesses in Ljubljana and the cultural sector (39 % agree and 16 % disagree). This corresponds to our knowledge we gained in the project on cultural tourism stakeholders in 2019 in which most of them expressed the wish that cooperation should be increased. One of such instruments of co-operation is the interest group of cultural tourism supplier that was established and is managed by the Tourism Ljubljana. It has about 50 members. Businesses stated that they see a lot of potential in enhancing both, the co-operation between the tourist businesses in general and concretely their own business.

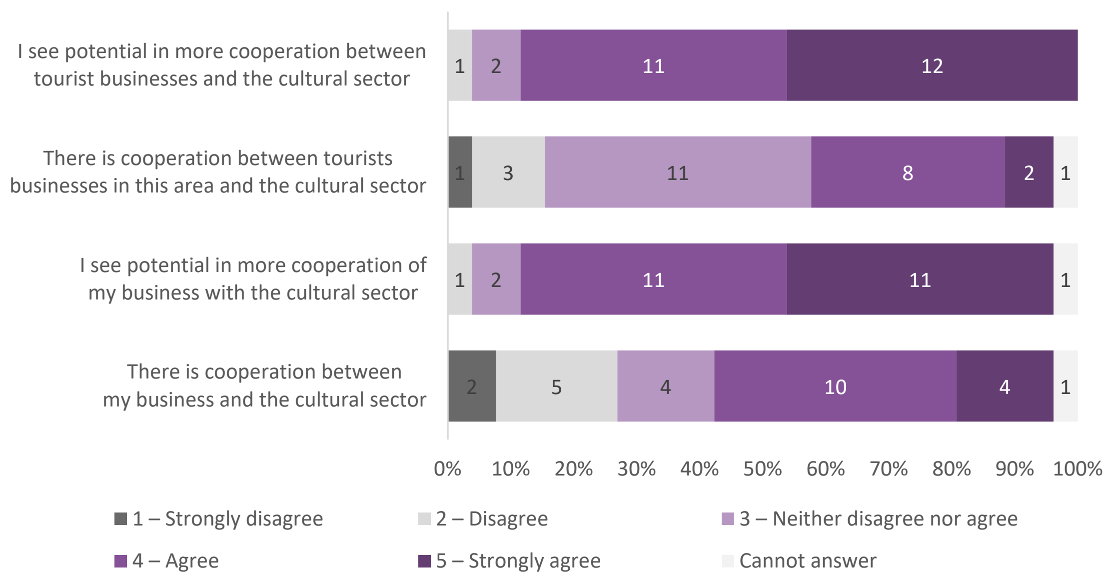

Figure 67: Dis-agreement with statement on current and potential cooperation of own business and tourist businesses in Ljubljana with the cultural sector(N=26).

33. Proposed improvements in the area (open question)

Among 26 respondents asked to propose improvements to the area to improve the experiences of both tourists and businesses, nine provided the suggestions summarized in the Table 1 (some of the respondents wrote multiple proposals). Among these, four are focused on the redistribution of tourism to other districts and into the wider urban region, four on the transport infrastructure and services, three on the work of tourism organization and two on the promotion and development of culture.

Table 1: Suggestions for the improvement of the cultural sector.

Topic/area	Suggestions
Tourism destination management	_ Enhanced role of the main umbrella tourism organization. _ Tourism Ljubljana should be more active, pervasive, confident and use more modern (digital) approaches and methods. _ Tourist providers should promote also other offer not just theirs. _ City Municipality and Tourism Ljubljana should regulate the tourist traffic flows (control of the work of foreign tour operators in our country, group size, group behaviour).
Decentralisation of tourist activities	_ Expansion of tourism to the wider area of Ljubljana, both within the city or urban area as well as outside. Establishment of specific cultural points – tourist attractions - within individual neighbourhoods. (2x)
Cultural offer	_ Creating new stories and thus new tourist sights and attractions. _ Better promotion of cultural attractions. (2x)
Transportation	_ The state must help co-finance new flights and destination accessibility through its airport. _ Better accessibility of the airport – train. _ It is necessary to improve public transport in the urban region (modernize the vehicle fleet, enable fast and frequent use of buses, without congestion) to improve traveling to the surrounding municipalities. _ A unified taxi system (Barcelona could be a role model). _ City transport more available for a foreign visitor (pricing and requirement of the Urbana card). (2x) _ Regulation or prohibition of cycling in the city centre, where the lines/streets are quite narrow. _ Missing garage house. Tourists cannot go to the center because they have nowhere to park.

III Covid-19 pandemic

34., 35. Impacts of Covid-19 on business

All of the 27 businesses surveyed in the questionnaire, were somehow affected by the Covid-19 pandemics. The question on FTE during the Covid-19 pandemic was answered by a considerably smaller sample than the one on the number of FTE in a regular business year but still the results did not change much. Big businesses have a somehow smaller share (23 % compared to 30 % in a normal year) and share of small (under five FTE) and medium business (10 to 15 FTE) slightly increased (from 40 to 45 % and 18 to 23 % respectively), because the share of large companies decreased.

Analysing the data these businesses provided on the number of FTE in a regular year we have prepared a graph to observe the change with previous year. Out of 22 businesses eight recorded a change in number of FTE. Six (27 %) of business has lower number of FTE after the outbreak of Covid-19 pandemics and some of them have reduced number of FTE up to 80 %. One business had a decline in number of FTE, but has since than raised it, and one business had no decline and only a (slight) rise in the number of FTE. Thirteen (60 %) of businesses had a stable number of FTE throughout this period. The companies with the change in FTE cannot be classified as one type companies but all kind of tourist providers can be found among them.

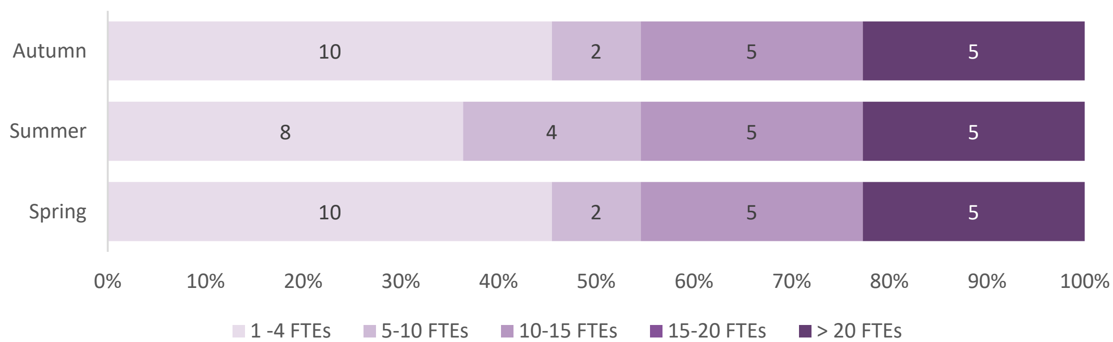

Figure 68: Number of full-time employees during the Covid-19 pandemics (N=22).

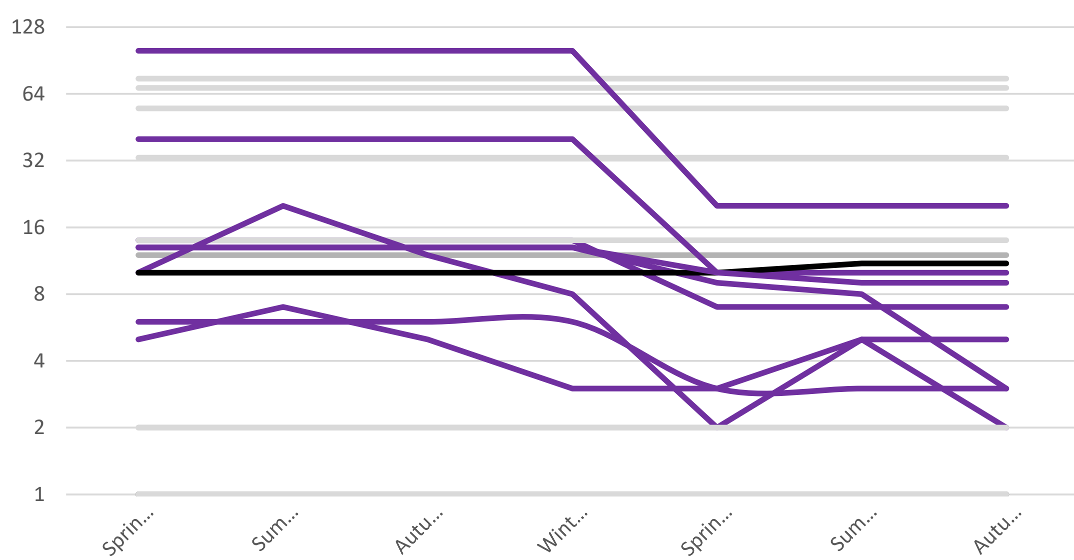

Figure 69: Number of FTE in business before and after Covid-19 pandemics. The violet ones are the ones with the change in FTEs (10 companies), the grey ones are without (12 companies; N=22).

All of the 27 respondents affected strong impact of reduced international visitor number, which comes as no surprise, as for a while Slovenia closed its borders for non-essential travels. Cancellation of events had the second strongest impact, but other impacts (cancellations, postponements, and reduced levels of bookings, forced closure) followed closely, recording big or strong impact in at least 70% of businesses. Smallest, yet still strong with above 50% respondents recoding big or strong impact, are reduced numbers of domestic visitors.

Figure 70: Rating the impacts of Covid-19 on business (N=27).

36.-38. Measures to offset the negative impact of COVID-19

During pandemics 26 businesses introduced measures to offset the negative impact of Covid-19 pandemics. Large majority (88 %) of the maintained connections with customers and business partners, 77 % enhanced their existing digital services and 50 % developed new ones, 54 % came up with new initiatives and products and 42 % explored new markets. 31 % businesses continued with advertising as normal. Two respondents provided details on other measures they introduced; first focused on providing more activities and events in public space and second expended its activities to the neighbourhoods outside of the city centre and their usual area of operation.

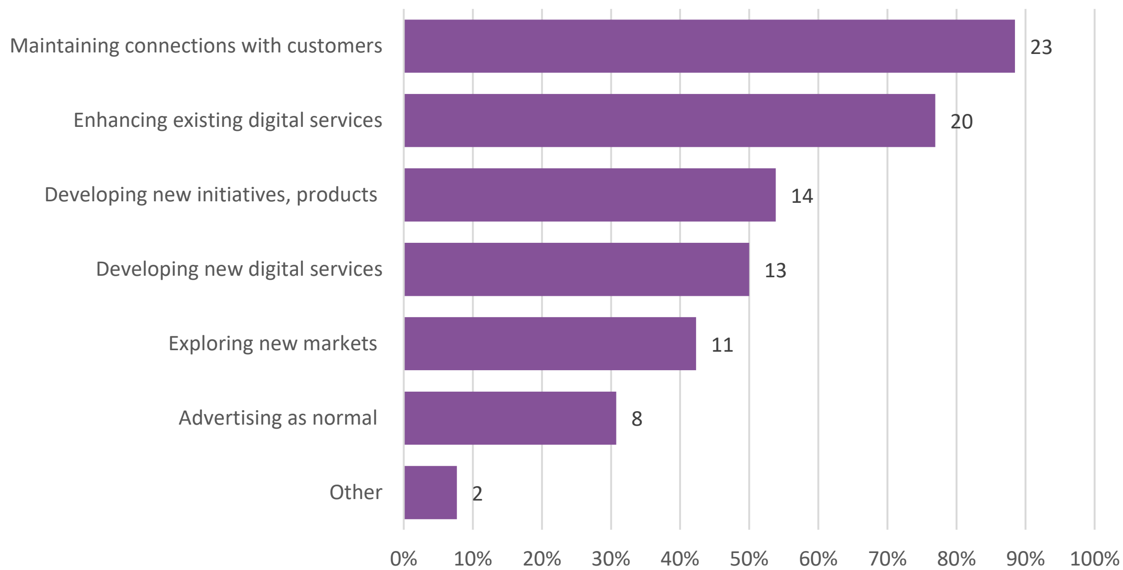

Figure 71: Measures business introduced due to the impacts of Covid-19 (N=26).

Businesses also change their employment policies in respond to the pandemics. Two thirds of businesses put its employees on furlough (38 % with full and 29 % with partial pay), a third redirected employees to other tasks and same share of business laid some of its workers off. 17 % kept workers on contract with zero-hour contracts or decided not to hire more staff which was otherwise planned to be hire before the pandemic. Only 17 % (4) businesses) had no change in their employment policies.

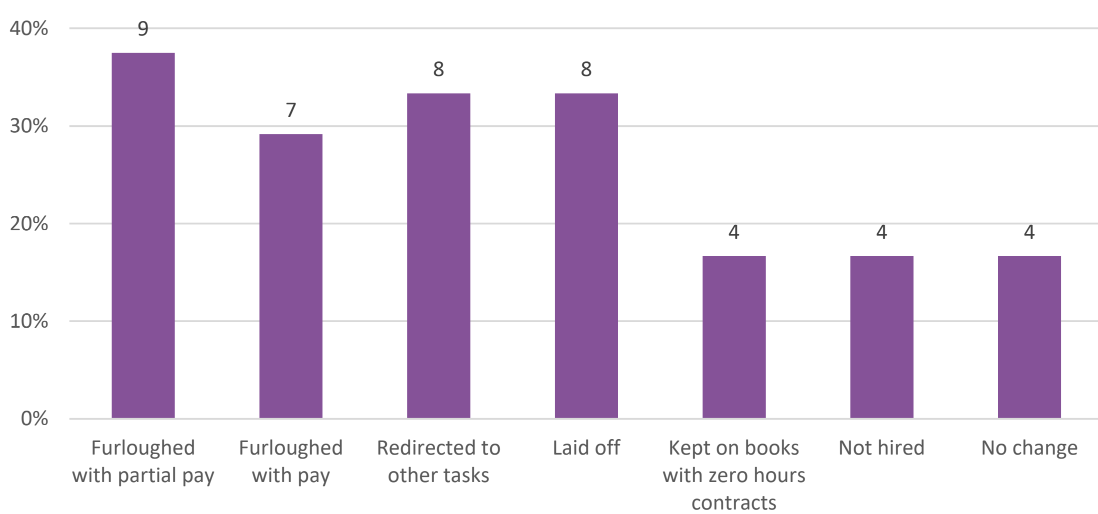

Figure 72: Changes in employment policies due to Covid-19 pandemics (N=24).

39. Governmental assistance

Large majority (21 out of 24) of business received assistance from the government to offset any impact of Corona. Most of them (20) received financial assistance with furloughs while smaller share also received loans or general advice (3 for each). Only three business received no assistance from government or had not applied for it. In addition to the measures, mentioned in the survey, Slovenian government also introduced additional measures. Among them were the so-called vouchers which belong to each resident of Slovenia; the adults have received 200EUR and the children up to 18 years 50EUR. These vouchers can be used for accommodation, a selection of restaurants or other offers, and are valid until end of 2021. While this might be one of Slovenian specific measures, it has not targeted much the cultural sector which was significantly impacted by the pandemic.

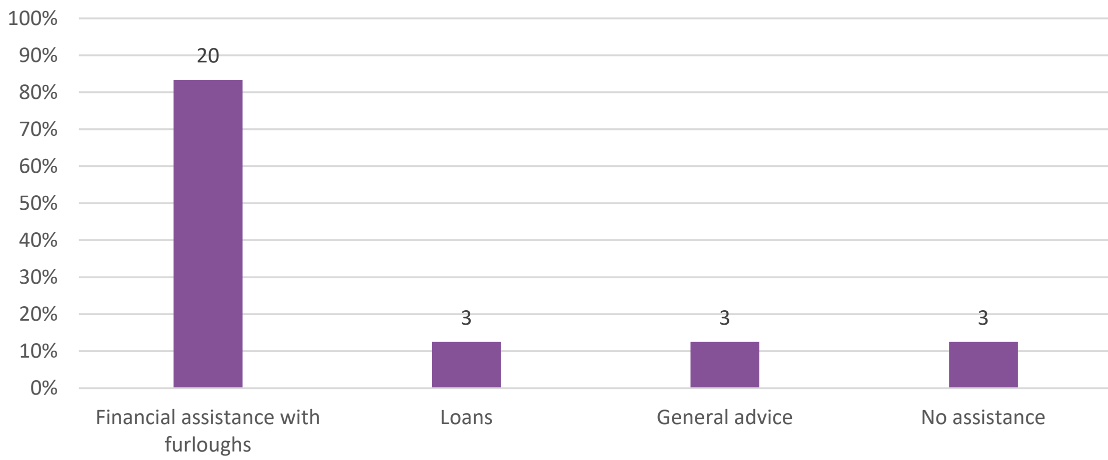

Figure 73: Received assistance from the government (N=24).

40. Sustaining of businesses

Asked about how long businesses can sustain their operation under the current situation of pandemics most of them predict that they will shortly be forced to cease operation. A quarter think they cannot withstand additional three months of pandemics (guides, two restaurants, three accommodation providers and two visitor attractions) and two thirds think they cannot withstand more than half a year of it. Only 4 out of 24 respondents can continue to operate in such conditions for over one year among which were 2 accommodation providers and one visitor attraction. This indicates that assistance from the government (or other address) is critical in the effort to maintain the tourism sector in Ljubljana during the ongoing pandemics and to redevelop the destination when the situation normalises.

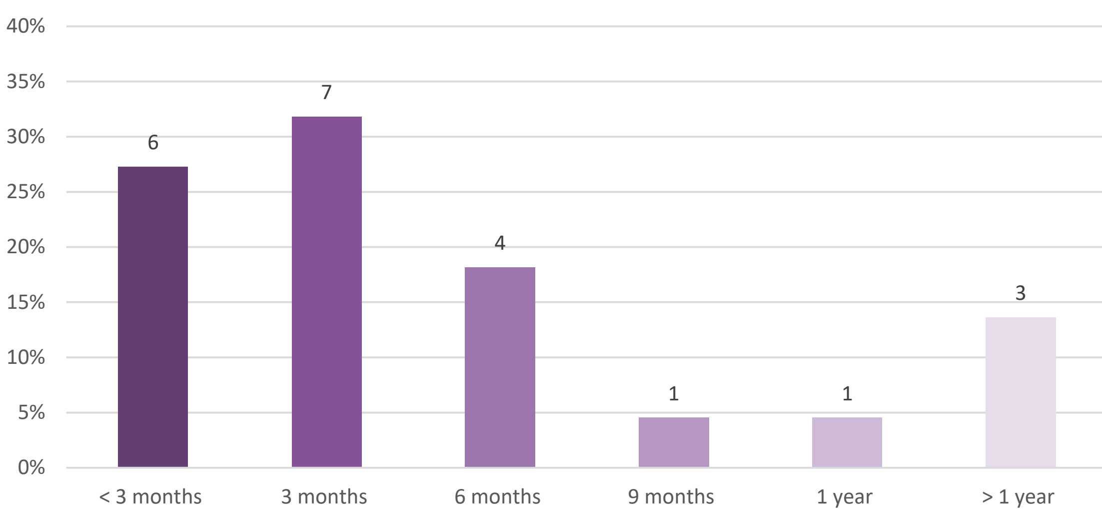

Figure 74: Estimate period of sustaining business with continuation of pandemics (N=22).

CONCLUSION

As already implied in the Foreword, the surveys were done in the challenging times, however, there still are some conclusions we can derive from them.

Firstly, no matter how bad the tourism industry is hit, the tourists will always return. The motive to travel, to explore, to experience something new, is one of the human motives that drives us to travel to other places. Having this in mind, our worries if there would be any tourists in Ljubljana, were unnecessary. As soon as the limitations to travel were lifted to some extent, tourists returned. However, not all the tourists returned, mostly only European ones and individual tourists. This structure resonates in the results of the survey with tourists, especially in the motives for which they have come to Ljubljana (architecture, life style, townscapes) which corresponds with the so-called tourists with special interest and tourists who are more explorers than mass visitors of the most popular tourist sights. The cultural offer was as well limited due to the cancellation of the events which mostly influenced Slovenian tourists. As proven in previous studies, Ljubljana is struggling with attracting foreign tourists to enter and visit cultural institutions such as museums, galleries, since the ratio is 7:3 in the benefit of domestic tourists. The reason for this is probably that none of these institutions are globally renown and thus present a major reason/pull factor for the tourist to come to Ljubljana. The results about the basic data on tourists are not surprising, also the length of the stay is typical for the city break stay. Regarding the bigger picture and the fact that Ljubljana also serves as starting point for exploration of the rest of Slovenia, one third of the tourists chose this option. They have selected the most visited Slovenian tourist destinations like Piran, Koper on the coast or Bled in the Alpine area.

Most appealing results in the surveys were the ones in which the residents reported on the added value of the cultural tourism to the City of Ljubljana. They agree that tourists bring life and excitement to the city and because of them the city has become more diverse, vibrant, more beautiful. The cultural and the service offer have been upgraded, a lot has been done also with the beautification of the urban space, the green areas and the accessibility of the city. Additional benefits are economical which should be especially emphasised since a lot of residents were before 2020 prospering from letting their real estate properties via portals like AirBnB. Not surprisingly, residents are predominantly positive about the influence of the tourism on the city, some of them reported some disturbances as well. Regarding improvements, most of them would like to see more concerts and live events which for now due to the situation are difficult to organise.

The results of the survey with the businesses contradict our hypothesis about the big seasonality of the sector. Despite summer being the busiest season for all respondents, the companies have not reported many changes in the numbers of employees throughout the year and also regarding seasonality before the crisis managed to stretch the season to the period between March and October, plus December as the festive holidays period. The only months without larger influx of tourists were thus January, February and November which proves that the tourism managers of Ljubljana did a good job stretching “the main season” and promote the city also out of the core summer season. Right in the pandemic year, Ljubljana was supposed to host two major international conference in the spatial planning alone.

Although the number of respondents in the survey was low, we managed to get a representative mix of the accommodation, cultural institutions, tourist guides and other service providers. In comparison to other urban destinations, these ventures, especially accommodation ones, cannot be compared to big chains (the number of hotel beds in Ljubljana was in the last years before crisis not matching the demand of the congress tourism), and most of the companies could be ranked as small- to middle-size companies. Business evaluate that, despite very positive trend in the last few years, there is a lot of unutilised potential to further develop tourism and cultural tourism offer of Ljubljana. To achieve this, they propose more investments in promotion and marketing, new attractions, spreading of tourist offer outside the city centre and improvements of public transportation to better address tourists.

Ljubljana as destination is attracting mostly foreign visitors, with a focus on families and special interest tourists. While visitors from EU countries are the most important to the businesses, local visitors from Ljubljana urban region rank highly among some cultural tourism providers. Especially, the traditional cultural institutions like museums and galleries are predominantly visited by domestic visitors. In 2019 there were different type of activities to change this, e.g. individual providers offer new products, some of the offer was digitalised etc. However, our experience from the survey in which we offered free entry to the City museum of Ljubljana as a token after the tourists answered the questionnaire, again confirmed that foreign tourists are not enticed by Ljubljana museums. Or we found the type of tourist personas interested in different kind of city exploration.

Last but not least, we need to comment on the impact of COVID-19 on all three groups of respondents. With the prohibition on most of non-essential travel throughout 2020 and different regulations among countries, this reflected in the survey of both tourists (most of them were from Slovenia or neighbouring countries) and business. Later reported very high decrease of foreign visitors, cancellation and postponements of booking and events. However, to stay afloat, business in tourism and cultural sector desperately need the financial and other support during the ongoing pandemics. Cultural institutions also adopted their offer, e.g. some of the exhibitions were offered as an on-line tourist product. This somehow signals that apart from the devastation pandemic brought to the tourism statistics of arrivals and overnight stays, we can also expect some positive changes to the cultural offer, and above all to the tourism management practices. Cities, which were the ones most affected by the pandemic, should integrate the risk management measures into the strategies and every day practices as well. Only like this they will ensure to develop as green city destination with reach and diverse cultural offer.

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