

SLOVENIA

Policy BRIEF



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Cultural tourism in Ljubljana

Guidelines for improvements of cultural tourism management in the city

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Introduction

Ljubljana has experienced a tourism boom in the last decade. The growth rate of tourist arrivals in the Slovenian capital has been among the highest in Europe (even reaching over 20% annual growth of arrivals in 2018/2017) and the number of tourist overnight stays has more than doubled between the years 2014 and 2018. Several factors have contributed to this, but one of the most influential is the destination's intensive promotion abroad. Foreign tourists account for an extremely high share of tourists, on average accounting for more than 90% of all overnight stays, the highest among Slovenian municipalities. Ljubljana, by far the most developed urban destination, on average, generates around 15% of all overnight stays in Slovenia (SURS). However, the rapid development of the destination also brings along challenges to ensure that tourism benefits the city as much as possible and that its negative impacts are kept to a minimum.



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If on one hand we see active promotion of Ljubljana as an urban tourist destination, on the other hand, the city has not been as active in drawing up measures and guidelines for managing the development of this activity in the city. This is also reflected in the growth of dissatisfaction of the local population with the presence of tourists and the touristification of the city centre (Ninamedia, 2019), mostly connected to the change of the service offer and the growth of renting out apartments on short-term rental portals (e.g. Airbnb).

Ljubljana has thus become one of the more popular and well-known urban destinations, where tourism strongly co-shapes the development of the urban space. Urban tourism encompasses all forms of tourism in cities, both in terms of the reason for the trip (business, leisure, visiting friends and family), the motives for the visit (purposeful visit to a destination, secondary destination on the way, random stopover) or the areas of interest (culture, architecture, sport, entertainment, shopping, etc.). In Ljubljana, cultural tourism is at the heart of destination development, as it can benefit a wider range of providers in the city, and such tourists are also associated with higher levels of education and higher spending during their visit. To fortify the promotion, the city also applied for the title of European Capital of Culture for 2025 but was unsuccessful at this attempt. However, regarding the UNESCO branding, the city has been a UNESCO Creative City of Literature since 2015 and has two inscriptions on the UNESCO World Heritage List (Prehistoric pile dwellings around the Alps since 2011 and the works of Jože Plečnik in Ljubljana – Human Centred Urban Design since 2021).

When it comes to traditional cultural tourism (visits to museums, galleries and cultural heritage sites), Ljubljana is characterised by the fact that, compared to other developed city destinations, a large proportion of cultural providers and stakeholders are public, thus operate directly under the municipality or the state supervision. The largest cultural institution is the Museums and Galleries of Ljubljana, a public institution that brings together 11 museums, galleries and cultural spaces. There are also a large number of state museums in the city, which operate directly under the auspices of the Ministry of Culture, e.g. Modern Gallery, Museum of Architecture and Design, Slovenian Ethnographic Museum, or other ministries like Slovenian School Museum. The state and the municipality also play an important role in other areas of cultural tourism, such as managing venues (Cankarjev dom, Križanke, Kino Šiška, Drama, SNG Opera and Ballet, MGL), organising events and festivals (Ljubljana Festival, Liffe). This offer is complemented by a few (smaller) stakeholders and tourism suppliers, such as private galleries, museums and venues (Cvetličarna, Equrna, Hest, MAK), as well as NGOs and other organisations active in the field of culture (Metelkova mesto, ŠKUC, Imago Sloveniae, Španski borci).

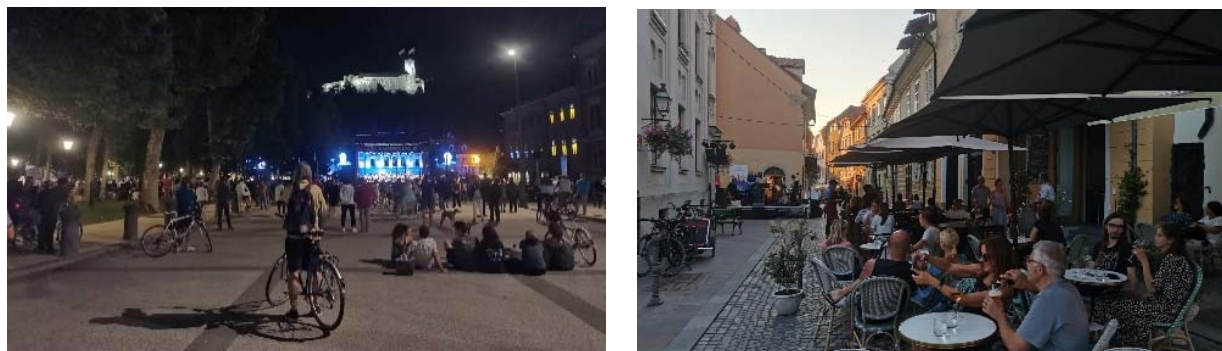


Figure 1: Ljubljana's cultural pulse in 2021. (Author: David Klepej)



1. Evidence and Analysis

The SPOT project addressed the analysis of the development and management challenges of cultural tourism by conducting an institutional analysis, a survey with tourists, residents and various (cultural) tourism providers, and in-depth interviews with nine cultural tourism stakeholders.

Out of the 100 tourists interviewed, the majority (51 and 48% respectively) cited architecture or townscape and local traditions as the key motivation for visiting the destination (Figure 2). A high proportion of tourists is also interested in nature, history and gastronomy. Festivals, museums, film and theatre were motivators for less than a fifth of tourists.

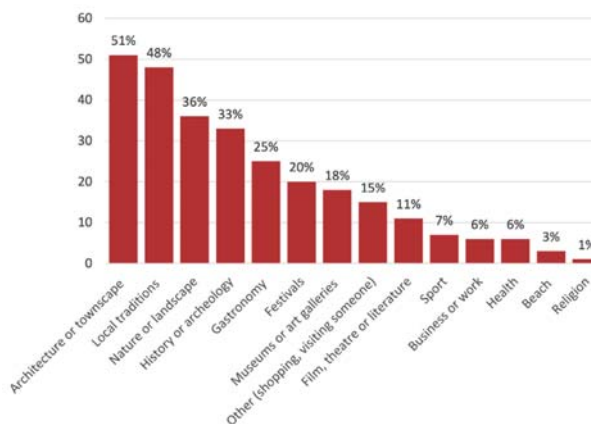


Figure 2: Tourists' key motives for visiting Ljubljana.

Cultural tourism providers consider there is a lack of cooperation between stakeholders in Ljubljana. According to the results of the survey of 40 companies we conducted in autumn 2021, the greatest amount of cooperation is currently in the design of cultural itineraries and routes and the joint implementation of promotional activities (Figure 3). The least cooperation is in the area of managing tourist flows and joint or group purchases or orders. More than one-fifth of the companies do not carry out any activities in cooperation with others, which shows the great potential and need for improving cooperation between providers in the destination. However, 30% of the companies pointed out that cultural heritage is the most important part of their cultural tourism offer and 67% strongly agreed with the statement that Ljubljana has great potential for cultural tourism development. On the other hand, only 11% strongly agreed and 33% agreed with the statement that cultural tourism in Ljubljana is well-developed.

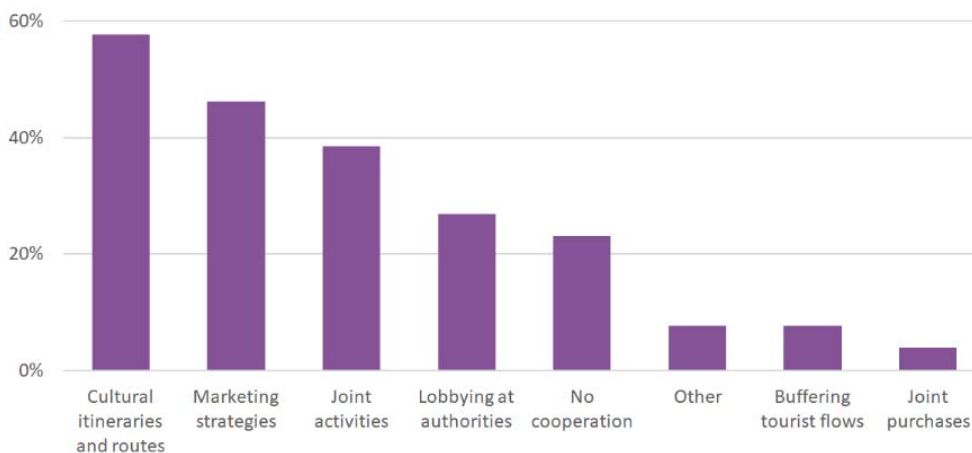


Figure 3: Areas of co-operation between companies.



"Ljubljana is working hard on its presentation and brand. It leaves little room for the local cultural scene to thrive in this tourist image. In return, they lack audiences and non-institutional production spaces. The pandemic has shown this"
 - Local Tourist Guide

"At the local level, everything is centralised - the Municipality of Ljubljana and Ljubljana Tourism - are financed by the same institution, which consequently leads to a representation of Ljubljana with a very one-sided brand identity and a capitalist idea of tourism as only a profitable activity. In the long term, this cannot be sustainable for the local population"
 - Local Tourist Guide

"The strategic approach to managing cultural tourism and developing more sustainable tourism is well managed. The Slovenian Tourist Board and Tourism Ljubljana are doing a really good job. They are good at guiding the development of cultural tourism and bringing together different tourism providers and businesses. More support could also be given to local initiatives in the cultural and creative industries."
 - Representative of the Centre for Creativity

According to the interviews conducted with cultural tourism stakeholders on the topic of cultural tourism management in Ljubljana, there is still a long way to go towards better intersectoral cooperation and communication (Figure 4). Some interviewees felt that there is a growing need for policies that more directly support local communities and their efforts to succeed in the tourism sector. In particular, the growing sector of micro and small enterprises and local cultural and creative industries, which often operate at the crossroads of different economic sectors. They believe that too much policy attention is focused on promoting exclusive boutique tourism, which indirectly excludes other segments of tourism and the local community, and focuses on over-promoting offers only in the centre of Ljubljana. Furthermore, they consider that the private sector is often ignored or excluded from major project collaborations compared to public sector providers. The existing partnership network of cultural and tourism providers in Ljubljana, led by Tourism Ljubljana, should be expanded. Some also believe that there is a need for more flexible policies, ones that would better empower the autonomous development of innovative cultural tourism offerings in the city.

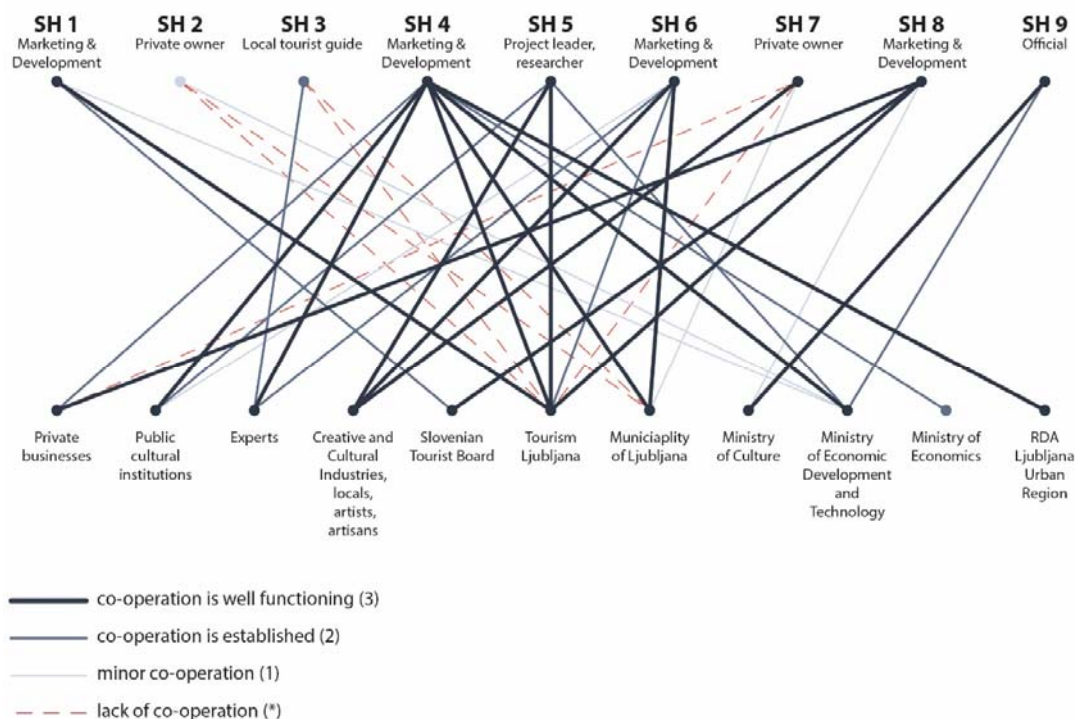


Figure 4: Interviewees have evaluated current cooperation between public sector stakeholders works well, while individual private sector stakeholders are often ignored and left out of larger project collaborations.



Based on the results of the previous analyses and knowledge of the destination, the management of cultural tourism in destination Ljubljana was analysed using an assessment wheel addressing 18 indicators in 6 areas of cultural tourism management. We assess that the destination's management performance is relatively good and that its managing bodies are at least partially addressing all of the performance indicators, but we also assess the potential for improvement in all areas. Most notably in the areas of sustainable management (which is at least active in the area of promotion) and the engagement and benefits to the local people and environment. The lack of the latter is also evident in the survey we carried out among residents. For example, the common vision of the destination development is clearly led by Tourism Ljubljana (with the support of the MOL and public institutions), but it does not reflect the needs and opinions of all stakeholders, nor does it go beyond the conventional strategic planning. Despite the many qualitative objectives of the city's tourism strategy, the key indicators of development monitoring are still qualitative and pursue the objectives of increasing the volume of tourism. The lack of cooperation is also evident in the formulation of policies at different levels, especially this is evident for the relationship between the local and the national level. The best-managed areas are sanitation infrastructure and the provision of services that also benefit the local economy and communities.

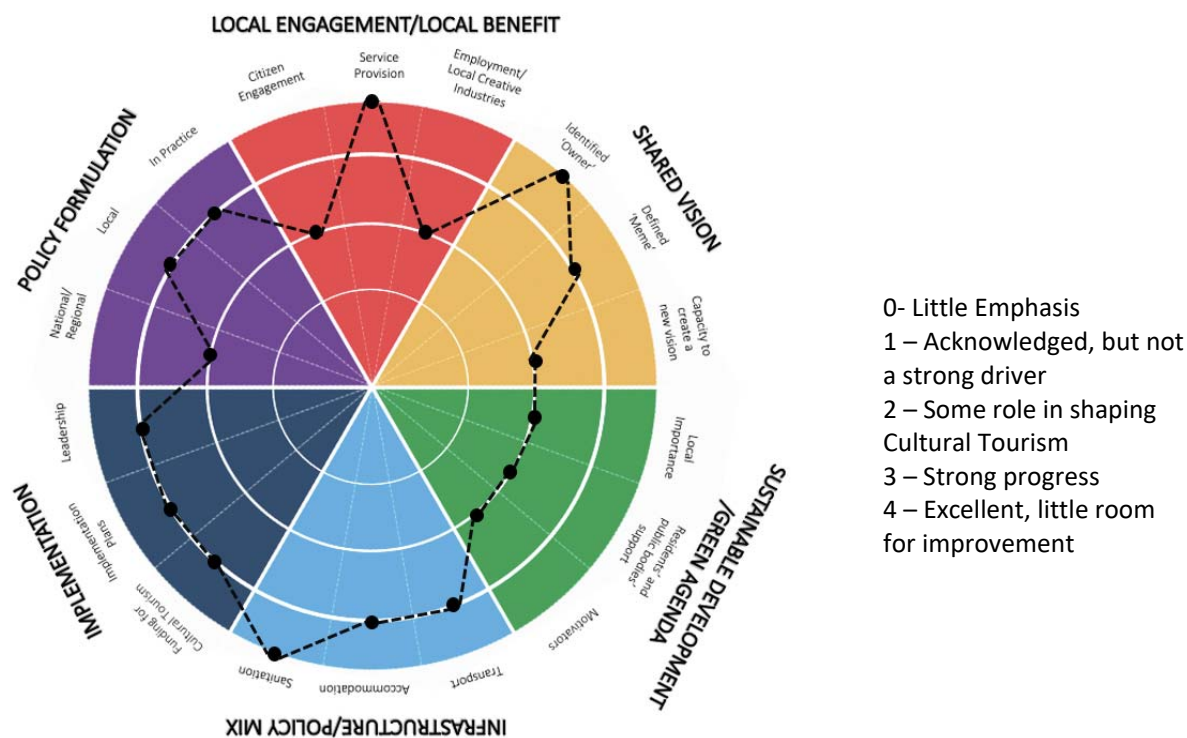


Figure 5: Assessment of the current management of cultural tourism in Ljubljana.



2. Policy Implications and Recommendations

Cultural tourism is an important economic sector at the intersection of tourism and culture in the **local environment**, but it can also help to build **European identities**, helping to overcome cultural misunderstandings and differences between European nations. If the development of cultural tourism in a destination is inclusive of the **local population**, it can also encourage them to become more active citizens, participate in the development and management of the city and take part in various cultural activities. In the case of Ljubljana, we believe that the further development of cultural tourism is certainly welcome, but managers and stakeholders need to ensure that its development is carried out in cooperation and coexistence with the local population.

In addition to the involvement of the local community, it is necessary to ensure the creation of **responsible and sustainable development objectives** that steer the development of cultural tourism away from the over-commercialisation of culture and urban space, and build the resilience of the destination and cultural tourism providers to (un)predictable events, such as was the Covid-19 pandemic. The offer should appeal more to visitors from the city, the region and the country, as domestic visitors are less vulnerable to crises than foreign visitors. We identify a key challenge in the field of cultural tourism as the high concentration of providers is directly managed by the municipality or state authorities and therefore, we propose a financial and **support framework** for the establishment of larger and more diverse offer, possibly by including NGOs and private initiatives. Support should be given not only to new products but also to new and alternative forms of cultural tourism rooted in the local environment and culture (e.g. storytelling, urban exploration, gastronomic tourism). Furthermore, there is a serious lack of **cooperation between the stakeholders**, which could lead to a number of optimisations and synergy effects. In all areas, the monitoring of the development of activities and the implementation of policies could also be improved to pursue qualitative rather than quantitative development objectives towards sustainable and responsible destination development, a good visitor experience and an increase in the quality of life in the city.

5 key directions for the development of cultural tourism in Ljubljana:

- embeddedness in the local environment and openness to the European cultural space
- involvement of the local community in the design and development of culture and tourism offer
- responsible and sustainable development objectives that will lead to a higher quality of life in the city
- a supportive environment for the development of small, new and innovative providers
- networking and cooperation between stakeholders and providers



Project Identity

Project name	Social and innovative Platform on Cultural Tourism and its potential towards deepening Europeanisation (SPOT)
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