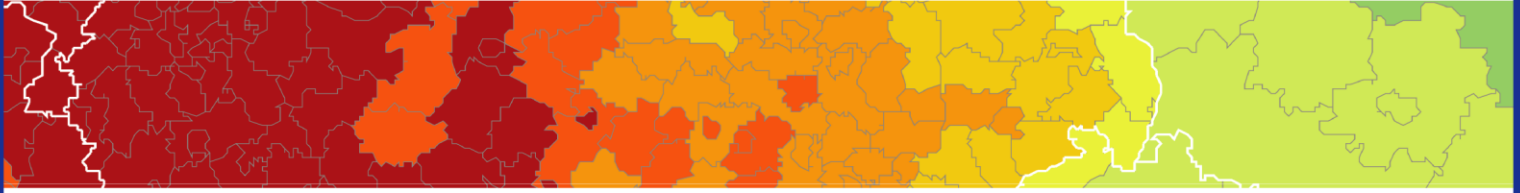


Inspire policy making by territorial evidence



Carrying capacity methodology for tourism

Targeted Analysis

Case study annex

Case study annex

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Case study annex

Carrying capacity methodology for tourism

Version 11/11/2020

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The final version of the report will be published as soon as approved.

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I Case study Bled

I.1 Step 1

I.1.1 Overall context

Destination definition

The destination Bled covers the area of the Municipality Bled¹. The destination boundaries have been defined by the following sources: the interviewees, strategic development and tourism documents of the Municipality Bled, and Green Scheme of Slovenian Tourism.

Bled is a town located on the Lake Bled and it is the administrative seat of the Municipality Bled (Figure A.1, left). Other settlements in the municipality are Bodešče, Bohinjska Bela Koritno, Kupljenik, Obrne, Ribno, Selo pri Bledu, Slaminiki and Zasip. Bled is most known for the Lake Bled, which has an island and a church in the middle, and a castle perched on a cliff above the lake. This tourist gem of global dimensions on the edge of the Triglav National Park was nominated one of the seven new wonders of the world. It is distinguished by a mild, healing climate and thermal springs of lake water.

The Municipality Bled was established in October 1994. It was greatly reduced in size with the establishment of the Municipality Gorje in June 2006. Bled has through this secession retained only 38% of its previous territory.

In terms of perceiving it as a destination, the municipality boundaries are not strictly followed and Bled comprises natural visitor attractions beyond the municipality, such as Vintgar Gorge, which is positioned in three municipalities; next to Bled also in Jesenice, but primarily in Gorje. It is positioned and marketed as a part of the wider destination of Julian Alps.

Destination location

Municipality Bled is located in the Upper Carniolan (Gorenjska²) region in north-western Slovenia. The region is comprised of 18 municipalities – besides Bled these are Bohinj, Cerklje na Gorenjskem, Gorenja vas-Poljane, Gorje, Jesenice, Jezersko, Kranj, Kranjska Gora, Naklo, Preddvor, Radovljica, Šenčur, Škofja Loka, Tržič, Železniki, Žirovnica (Figure A.1, right). Bled Municipality borders the municipalities of Radovljica, Žirovnica, Jesenice, Gorje, and Bohinj.

Bled is a part of Alpine Slovenia, one of the four tourist “macro destinations” in Slovenia, as defined by Strategy for the Sustainable Growth of Slovenian Tourism 2017-2021 (MGRTRS, 2017); presented in Figure A.2 (left). Within Alpine Slovenia, Bled is one of 10 “leading destinations”, who are defined as key subjects of Slovenian tourism at the level of individual destination (Figure A.2, right).

¹ ISO 3166-2:SI code for Bled is SI-003.

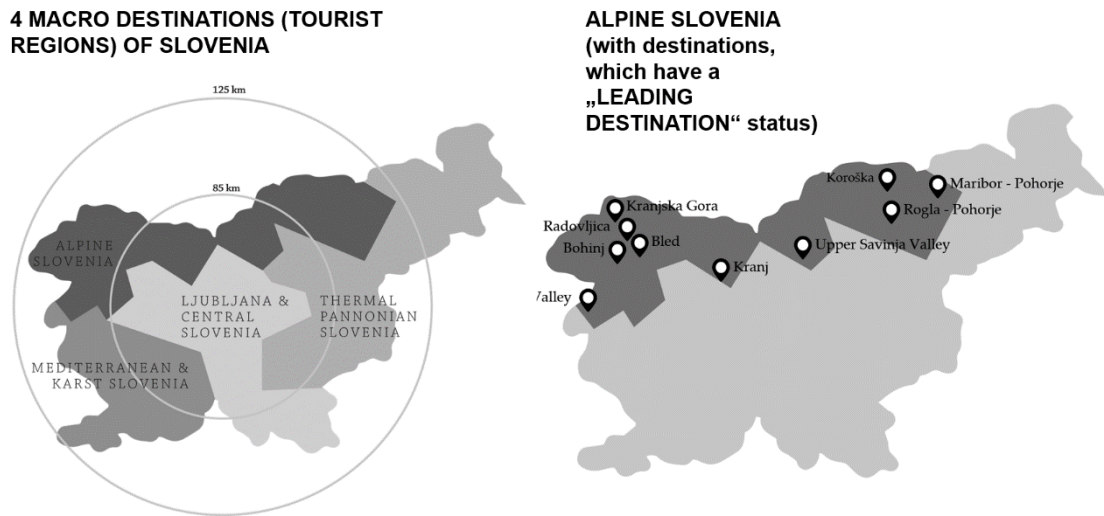
² NUTS-SI04 (Western Slovenia) is SI042 – Gorenjska Statistical region (comprised of 18 municipalities: Bled, Bohinj, Cerklje na Gorenjskem, Gorenja vas-Poljane, Gorje, Jesenice, Jezersko, Kranj, Kranjska Gora, Naklo, Preddvor, Radovljica, Šenčur, Škofja Loka, Tržič, Železniki, Žirovnica).

Figure A.1: The position of the Municipality Bled in Slovenia (left) and in Gorenjska region (right)



Source: OB, 2009

Figure A.2: Four tourist macro destinations (regions) of Slovenia and position of Bled in Alpine Slovenia



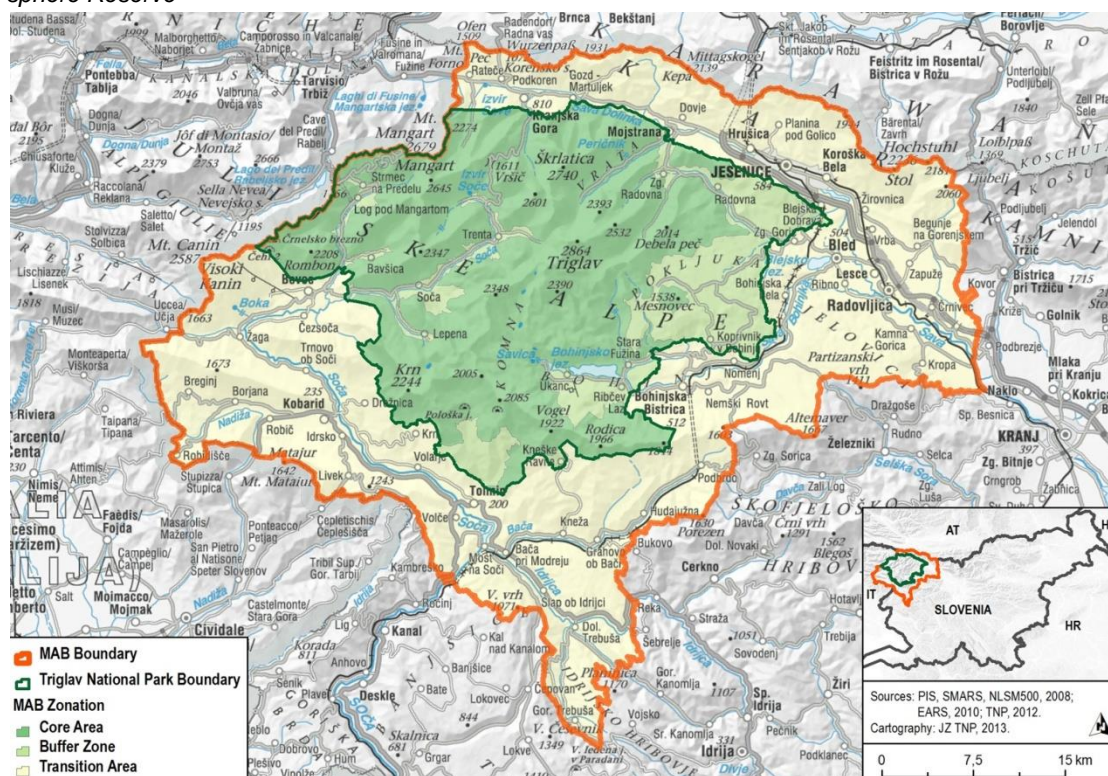
Source: STO, 2020

Bled is located in the Julian Alps, one of the 4 mountain ranges in Alpine Slovenia. Next to Julian Alps, these are Karawanken, Kamnik-Savinja Alps, and Pohorje. Bled is together with nine other municipalities a partner in the Julian Alps Association, an area with a status UNESCO MAP Biosphere area – Julian Alps Biosphere Reserve (Figure A.3). Other municipalities are Bohinj, Bovec, Gorje, Jesenice, Kobarid, Kranjska Gora, Radovljica, Tolmin and Žirovnica. The 10 municipalities contribute 25.7% of all overnight stays in Slovenia (data for 2019).

The Julian Alps Biosphere Reserve spans three administrative units: Tolmin, Radovljica, and Jesenice, located in two statistical regions. Next to Gorenjska it is located also in Goriška region. It covers about 10% of Slovenia’s territory. Its most important asset is Triglav National Park, which is the only Slovenian national park and one of the oldest European parks. The area covers 195,723 ha, of which the central zone of the Park is 63,900 ha, marginal zone 20,082 ha, and transitional zone: 111,741 ha – where the majority of the tourist centres (and environmental impacts) are.

The partners of Julian Alps Biosphere Reserve are Public Institute Triglav National Park (who manages the Biosphere Reserve) and the tourist boards of Bled, Bohinj, Soča Valley, Kranjska Gora, Radovljica and Žirovnica, whereas Jesenice and Gorje are represented by municipalities' administration. The programme also includes the transboundary cooperation with Italian Natural Park Prealpi Giulie. The marketing organisation of Julian Alps comprises also destinations Brda (the municipality north of Nova Gorica) and Kanal ob Soči (a new partner in Soča Valley). The area of Julian Alps is the region with highest growth rates in the last few years in Slovenia (next to the capital). Overtourism has been brought into the spotlight in the last couple of years. 8 out of 10 municipalities in the region already have a Slovenia Green destination label. At the same time, it is an area with the only national park (Triglav National Park). Because of the high pressures on local nature and social environment that tourism is bringing into this delicate space, there is fortunately a very high understanding of the need to develop the area in a sustainable manner – putting the quality of life for residents first.

Figure A.3: Map showing the relation between the borders of Triglav National Park and Julian Alps Biosphere Reserve



Source: TNP, 2016

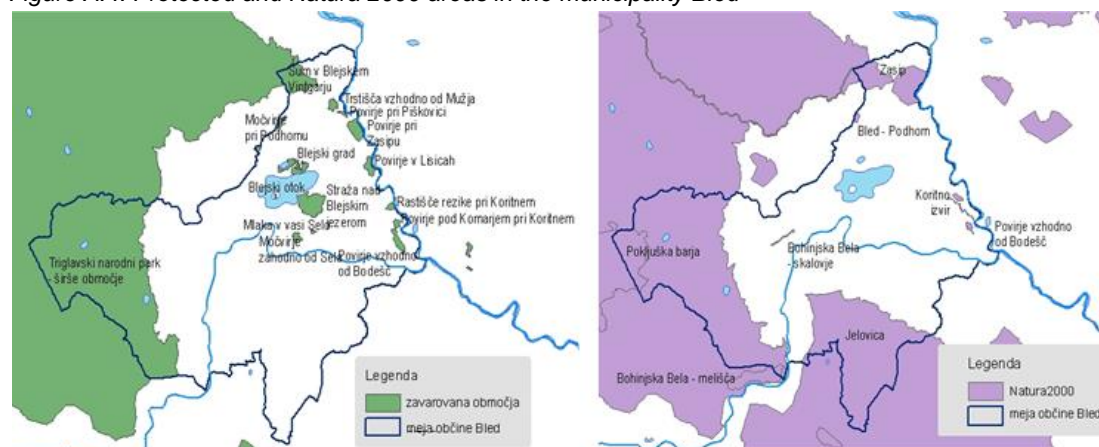
There is a strong consensus among all tourism partners (tourism DMOs- Destination Management Organisations) about the importance of sustainable development for the region. These challenges go well beyond the usual roles of tourism organisations. In line with the new paradigm of management roles of DMMOs (Destination MANAGEMENT and MARKETING Organisations – and not only marketing), the tourism organisations need to work closely with bodies who regulate and manage agriculture policies, mobility, infrastructure development, etc. The tourism organisations in the area have therefore established active cooperation with

municipalities, development agencies and other relevant bodies. As interviewees stated, today more than ever, tourism needs to be seen as a cross-sector policy, and not an independent industry.

Socio-economic situation of the municipality and the region

Municipality Bled measures 72.30 km², which ranks it 96th among Slovene municipalities and represents 3.4% of Gorenjska region, and 0.4% of Slovenian territory. 36.4% of the territory is in Natura 2000 (Figure A.4, right), and a considerable part is protected (Figure A.4, left). The western part of the municipality is located in Triglav National Park.

Figure A.4: Protected and Natura 2000 areas in the municipality Bled



Source: OB, 2009

In 2018, about 8,000 people were living in the municipality, which ranks Bled 66th among Slovene municipalities, but represents only 3.9% of the Gorenjska region population of 203,636. Around 5,000 people live in the area of Lake Basin. The trend in the municipality population number is negative. Furthermore, the municipality's ageing index is higher than the national average, and the mean age of people in Bled is growing more rapidly than in Slovenia as a whole. This makes it demographically endangered municipality.

The population density in the municipality was 108 people per square kilometre, which was higher than the national average of 102 people per km². It was also higher than in Gorenjska region (95). The concentration rose through the process of succession of Municipality Gorje.

Among people aged 15-64 (i.e. working age population) about 67% were persons in employment (i.e. persons in paid employment or self-employed persons), which is more than the national average (65%). However, the municipality is below the Slovenian average in terms of many economic indicators. The average monthly gross earnings per person employed by legal persons were about 4% lower than the annual average of monthly earnings for Slovenia; and net earnings about 4% lower.

The educational structure of the population of the municipality and the region was rather good. The share of population in the region with basic education or less was lower than the national average, while the share of population with tertiary education was higher than the national

average. Another important SORS sourced indicator shows that on average, people living in the Gorenjska statistical region were among the most satisfied in Slovenia (average assessment was 7.6 out of 10).

Average monthly net earnings of persons employed in the region were slightly below the national average (EUR 1,091). The region had more than 20,000 enterprises, of which Bled Municipality had 1,256, with almost 78,000 persons employed. In 2018, GDP per capita in the region was EUR 19,833 and thus lower than the national average. According to internal data of the Association of Julian Alps, 13.3% of all enterprises revenue was generated in tourism (with hotels). 20.1% of all people employed in the municipality were in tourism and hospitality industry. The data, however, does not include the biggest hotel company Sava Hotels & resorts, since it is registered outside the municipality.

The residents in the Gorenjska statistical region are careful about waste management. The share of separately collected municipal waste was the highest in the country (78%), but in 2018, 546 kg of municipal waste per person was collected in Bled, which is 185 kg more than on average in Slovenia.

The data that summarise Municipality Bled from the socio-economic point of view is presented below in Table A.1, together with comparison to Gorenjska region and Slovenia.

Table A.1: Data and indicators for Municipality Bled, with comparison to Gorenjska region and Slovenia

Data for year 2018	Municipality Bled	Gorenjska Region	Slovenia
Area km ²	72.30	2,137	20,273
Population	7,835	203,568	2,070,050
Population men	3,830	101,124	1,030,234
Population women	4,005	102,444	1,039,816
Population density	108	95.3	102
Natural increase	-2	150	-900
Total increase	-37	1,035	14,028
Live births per 1,000 population	8.4	9.9	9.5
Deaths per 1,000 population	8.7	9.2	9.9
Natural increase per 1,000 population	-0.3	0.7	-0.4
Total net migration per 1,000 population	-4.5	4.3	7.2
Total increase per 1,000 population	-4.7	5.1	6.8
Mean age (years)	45.4	42.9	43.4
Ageing index	171.2	124.3	130.6
Ageing index for men	134.2	101.5	107.2
Ageing index for women	212.8	148.9	154.8
Number of kindergartens	2	88	968
Number of children in kindergartens	321	8,664	87,147
Number of pupils	625	19,436	184,101
Number of upper secondary school pupils (by residence)	242	7,458	73,110
Number of tertiary students (by residence)	279	7,199	75,991
Tertiary students (per 1,000 population)	36	35	37
Tertiary graduates (per 1,000 population)	7	8	8

Data for year 2018	Municipality Bled	Gorenjska Region	Slovenia
Number of persons in employment (by residence)	3,284	89,133	872,772
Number of persons in employment (by work place)	2,999	76,223	872,772
Number of persons in paid employment (by work place)	2,513	67,000	780,203
Number of self-employed persons (by work place)	486	9,224	92,569
Employment rate (%)	67.2	68	64.2
Average monthly gross earnings per person (EUR)	1,612.65	1,673.34	1,681.55
Average monthly net earnings per person (EUR)	1,051.54	1,091.38	1,092.74
Average monthly gross earnings (index, SI=100)	95.9	99.5	100
Average monthly net earnings (index, SI=100)	96.2	99.9	100
Number of enterprises	1,262	20,029	200,174
Turnover of enterprises (EUR 1,000)	276,325	8,405,345	117,040,613
Number of dwellings, Dwelling Stock	3,636	79,731	852,181
Number of dwellings (per 1,000 population)	462	392	412
Number of dwellings with three or more rooms (%)	73	65	62
Average useful floor space, Dwelling Stock (m ²)	96.7	85.7	81.5
Number of passenger cars	4,496	112,008	1,143,150
Number of passenger cars (per 100 inhabitants)	57	55	55
Average age of passenger cars	9.4	9.8	10.1
Municipal waste collected by public waste removal scheme (ton)	4,279	80,183	747,535
Municipal waste collected by public waste removal scheme (kg/per person)	546	394	361
Export of goods (EUR mio.)	/	2,684	30,858
Import of goods (EUR mio.)	/	2,042	30,706
Investment in fixed assets	/	477,131	5,941,739
Regional gross domestic product (EUR mio.)	/	4,041	45,755
Regional gross domestic product per capita (EUR, current rate)	/	19,833	22,083
Current expenditure for environmental protection (EUR 1,000)	/	36,835	595,296
Gross fixed capital formation for environmental protection (EUR 1,000)	/	11,891	237,766

Source: SORS. (n.d.b.)

A wider socio-economic analysis of the Gorenjska region, in comparison to other region in Slovenia and a selection of regions from Austria and Italy is provided in Table A.2.

Table A.2: Comparison of Gorenjska region to other regions in Slovenia and a selection of region in Austria and Italy

REGION	Area (KM2)	Population (2018)	Population density (2018)	Aging index (2019)	Share of population of 25-64 age, with tertiary education (2018)	Level of working activity (2017)	Index of job migration (2018)	GDP per capita (2017)
NUTS 2 Zahodna Slovenija	7.839	977.163	124,7	125,1	34,6	64,3	112,2	24.919
NUTS 3 Gorenjska	2.137	203.636	95,3	125,4	31,0	65,6	85,9	18.507
NUTS 3 Goriška	2.325	117.260	50,4	151,1	29,6	63,7	93,5	19.131
NUTS 3 Osrednje-slovenska	2.334	542.306	232,4	115,1	38,1	64,1	128,6	29.371
NUTS 3 Obalno-kraška	1.043	113.961	109,3	150,3	29,8	63,1	98,4	21.242
NUTS 2 Vzhodna Slovenija	12.432	1.089.717	87,7	138,0	28,7	60,2	89,6	17.144
NUTS 3 Primorsko-notranjska	1.456	52.334	35,9	134,3	28,1	65,4	72,4	15.005
NUTS 3 Jugovzhodna Slovenija	2.675	142.819	53,4	114,1	27,1	64,6	90,3	20.467
NUTS 3 Savinjska	2.301	254.760	110,7	127,3	26,5	62,6	95,4	19.045
NUTS 3 Posavska	968	75.359	77,9	138,6	25,1	62,3	77,0	17.326
NUTS 3 Podravska	2.170	322.058	148,4	148,9	27,2	57,6	96,7	16.840
NUTS 3 Zasavska	485	57.061	117,7	143,9	24,5	61,0	59,2	10.910
NUTS 3 Koroška	1.041	70.550	67,8	140,7	24,7	58,9	87,6	16.561
NUTS 3 Pomurska	1.335	11.776	8,8	166,8	22,1	53,6	89,5	13.978
NUTS 2 Kärnten/ Avstrijska Koroška	9.538	560.898	58,8	158,9	30,6			
NUTS 3 Klagenfurt-Villach/ Celovec-Beljak	2.030	286.579	141,2	156,6				
NUTS 3 Unterkärnten/ Spodnja avstr. Koroška	3.376	149.930	44,4	154,5				
NUTS 2 Friuli-Venezia Giulia/ Furlanija Julijska krajina	7.858	1.215.538	154,7	212,2	21,1			
NUTS 3 Udine	4.904	529.381	107,9	217,6				
EU28	4.475.757	512.379.225	114,5	126,8				

Source: BSC, 2019

Tourism statistics

Bled is one of the three Slovenian destinations with over one million overnight stays (next to the coastal municipality Piran and the capital Ljubljana, with the latter being the only one with over 2 million), with 95.41% of foreign overnights and 2.22 days average stay in 2019 (SORS 2020c).

The number of overnight stays doubled from 2008 to 2019, from 540,480 in 2008 to 1,132,574 (index 2019/2008 is 209), whereas the number of arrivals more than doubled, from 214,558 in 2008 to 509,247 in 2019 (index 2019/2008 is 237) – see Table A.3. However, Bled in the year 2019, recorded 1.7% less overnights stays than 2018, but 2.5% more arrivals (SORS data for 2019 is provisional). The trend in average stay is negative – it has dropped from 2.52 days in 2008 to 2.22 in 2019 (the Slovene average in 2019 is 2.53 days).

Bled has, according to the data from Municipality Bled, in 2018 8,747 beds (7,483 with camping places excluded), an increase from 5,297 in 2009 (OB, 2019). The number has exceeded 9,000 beds in 2019 (the data is provisional, and stated by Bled Tourist Board). The number of registered accommodation providers (AJPES, 2020) is 677, as of January 2020. The number of hotel beds stayed nearly the same in the period from 2009 to 2018 (an increase from 2,379 in 2009 to 2,578 in 2018), but the number of private rooms and apartments nearly tripled, from 1,485 in 2009 to 3,989 in 2018 (OB, 2019).

Bled is considered to be the strongest brand in Slovenian tourism, with often higher brand recognition than Slovenia itself. It is considered a “must-see number one destination” in

Slovenia for all first-time visitors to Slovenia. When considering the impacts of the number of visits to Bled, it is not only about the tourists staying in Bled, but more about the tourists visiting Bled for a few hours within their Slovenia and wider Central European tour, and tourists staying in other parts of Slovenia and visiting Bled on a daily tour. On beautiful warmer days, especially over the weekend, there is an additional influx of domestic visitors, coming for a stroll or a swim. According to Bled Tourist Board estimates, the numbers of day visitors to Bled in high season is 10,000, next to some 10,000 tourists spending the night there. This means that there are approx. 4 to 5 tourists per one local in the lake basin (with 5,000 people are living in the lake basin). Furthermore, with tourism growth in the wider area of Julian Alps, tourism numbers and beds have increased in the neighbouring destinations (especially in the neighbouring Municipality Radovljica) and all these tourists gravitate to Bled. A good indication of the latter is the camping place in Radovljica with a capacity of 1,000 guests to open in the Municipality Radovljica in 2020, located only a couple of kilometres from the Bled centre (the name will be Bled River Camping).

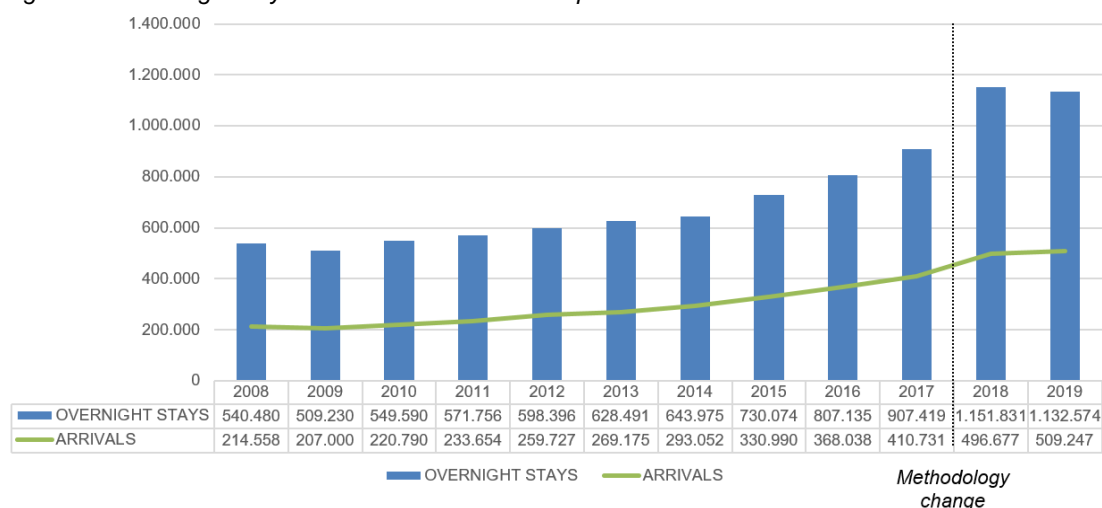
The tourist tax inflow to the municipality was EUR 2.5 mio. in 2019. The municipality has the highest possible tourist tax value of EUR 2.5 (to which an extra 25% is paid as a promotion tax by the tourist; which is then directly transferred to Slovenian Tourist Board).

Table A.3: Overnight stays and arrivals in Municipality Bled in 2018 and 2017

	Tourist arrivals 2018	Overnight stays 2018	Tourist arrivals 2017	Overnight stays 2017
Countries – Total	496,677	1,151,831	410,731	907,419
Domestic	24,287	50,848	22,031	42,576
Foreign	472,390	1,100,983	388,700	864,843

Source: SORS

Figure A.5: Overnight stays and arrivals in Bled in the period 2008 to 2019



Source: SORS, 2020c; SORS, 2020d

I.1.2 Needs assessment

Interviews and analysis of the destination's tourism, carrying capacity, as well as overall socio-economic development shows the following key needs (challenges, threats, problems, as well as strengths and opportunities) that are relevant for the scope of the project.

The need for dedicated and coordinated sustainability planning and stricter measures

Bled has a sound sustainability platform, working on several levels. Bled municipality holds the gold Slovenia Green label, indicating the destination's compliance with requirements defined by the Green Scheme of Slovenian Tourism (GSST), which is based upon Green Destinations standard. There are two accommodation providers in the municipality, which have Slovenia Green Accommodation certificate (Hotel Savica – owned by Sava Hotels & resorts; and the school hotel Astoria). Since 2011, Bled municipality has been a member of the Alpine Pearls group, the objective of which is to promote sustainable mobility. Bled is also a ZERO WASTE municipality. All these platforms give a good direction, as well as represent a good quality platform for measuring different sustainability indicators and taking measures accordingly, but there is a need for more coordinated approach and most importantly, for stricter measures, especially in one of the most pressing areas – the quality of Lake Bled water, flora and fauna.

Sustainable development of the nature & environment is a high priority of Bled – with Lake Bled being nature value number one. The lake water quality is of prime importance, for tourism and for the vitality of nature, which is the main attractor of the destination. The water quality (and the state of the lake basin, with flora and fauna state) is regularly monitored, but the high pressure on the lake (especially from 2016 onwards) has taken toll. The quality of the water has been only “moderate” in recent years (and to “good”), which shows that one of the main goals of the municipality development strategy (OB, 2009) has not been fulfilled. The data for February 2020 is, according to the Slovenian Environmental Agency, alarming, with very high levels of phosphorus, resulting in unattractive reddish colour of the lake. There is a mixture of contributing factors that need to be urgently addressed such as fish food, swimmers, outdated cleaning and unfinished sewage systems. This issue has been top priority since February/March 2020. A dedicated body of professionals has been appointed for this topic by the Municipality Bled mayor, comprised of different stakeholders and professionals. However, these problems call for a stronger, coordinated planning and implementation of measures increasing environmental sustainability of the destination.

The need to find a balance between tourist inflow and satisfaction of residents

Bled is one of destinations in Slovenia which have come to acknowledge the importance and urgency of competent and active destination management and governance, visitor experience management, tourism flows management and working to establish a balance between tourism and a local community. However, the growth in the recent 2 to 3 years has been – in terms of demand and new accommodation facilities – too quick. Despite the destination's sustainability practices and active municipality governance, the destination has not efficiently addressed the

growth, and even more so the “invisible burden of tourism” (the author of the concept is Travel Foundation). There are several related issues; for example, the costs of tourism on destination assets are not being met/accounted for (resulting in deficits), lack of sufficient infrastructure to deal with tourism demand (especially in peak times). However, the most pressing matter is that the attitude of local residents towards tourism in Bled has shifted. There have been tensions since around 2018, with local people experiencing daily traffic jams, increase of real estate prices, high density of Airbnb rentals, local residents moving out of the Bled centre in order to let out the apartments, high concentration of hostels and other budget accommodation, resulting in late night drinking and peace disturbance, etc. This shows an urgent need to find a better balance between tourist inflow and satisfaction of residents as well as the sustainable development of the destination.

The need for carrying capacity measures in the destination as a whole, and especially in some of the destination’s hotspots

The carrying capacity of the destination has so far not been systematically and strategically addressed. Two to three hotspots in the destination are already facing the need for carrying capacity evaluations and respective measures, but only in certain periods of the year. These are the Vintgar Gorge, the Bled Island and the Bled Castle. The latter is managing the visits very well, especially with the shuttle system established with the new northern bypass, which enabled new parking places at the foot of the castle. New investments are planned, which will further increase the capacity and enhance the experience, such as the lift from the lake to the castle, and the entrance visitor centre. Public Institute Triglav National Park has recently prepared a carrying capacity methodology for Vintgar Gorge, which defines that the total annual number of the visits should be reduced from some 400,000 to approx. 250,000, in order to assure nature preservation and good quality visitor experience. The methodology has not yet been confirmed, since there is still discussion between the local stakeholders, Public Institute Triglav National Park and the Ministry of the Environment and Spatial Planning.

However, there is a need for a holistic approach. Reducing the number of visits in certain hotspots has a direct impact on the tourist flows and there is a need for communication strategy and new places promotion (redistribution of visit to other spots in the wider area). Public Institute Triglav National Park is currently preparing a development and action plan for management of the hotspots in the Triglav National Park.

The need to accelerate key infrastructure projects in the field of mobility

Bled is only a few kilometres from the Gorenjska highway (A2, from Croatian border pass Obrežje to Karawanken tunnel, which is a part of the European E61 and E70, as well as the X. Pan European corridor Salzburg–Solun). There is also a railway connection through the municipality. Bled has a good accessibility, but the municipality faces severe traffic jams, due to its transitory status, and suffers from lack of parking places.

In 2018, Bled acquired the long-awaited north bypass road, which halved the traffic pressure in the direction of the Bled Castle and Pokljuka Plateau. However, the all-inclusive solution for the vigorous traffic problem will come only with the norther bypass, which is needed to decrease the traffic to Bohinj. Namely, now all the traffic to the neighbouring lake destination of Bohinj passes the centre of Bled and goes along the Bled Lake. This bypass has been planned for decades and the works were about to be started at the beginning of 2020s, but the Government postponed this vital infrastructural project for another 10 years (towards the year 2030). The Municipality Bled had been working actively in the past few months and managed to push the deadline back again – the project is to start in 2020/2021 and to be finished by 2023/2024. The project is also of the utmost importance, because only with this bypass the road along the lake can be closed for urgent sewer system reconstruction.

The need for tourism infrastructure and services improvement

As stated by the interviewees, another key challenge is to improve the quality of tourism infrastructure as well as services. Measures need to be taken across the sector to upgrade the quality of services in hospitality industry and, importantly, to direct future investments, especially into higher quality, full-service and more boutique accommodation. Presently, the majority share in accommodation facilities is in private rooms and apartments (the number tripled in the last 10 years), but these are of often lower quality. The owners are predominantly running the business as their second business, lacking important hospitality industry competences, with little interest in collaboration in destination management activities, resulting in lower quality and poorer visitor experience. An additional challenge relates to the increasing presence of alternative and often illegal rental apartments and other types of accommodation, that through platforms, such as Airbnb, provide unfair competition with the regulated apartment or hotel sector. Furthermore, in certain areas of the destination (Lake Basin area), there is a high concentration of hostels, which further undermines the endeavours of the destination to be a high-quality destination. Despite the importance of private small tourism accommodation, this sector is presently a weak link and the challenges urgently needs to be addressed.

Another issue related to quality of service is human resources related. The key issues are: the lack of qualified staff at both operational and managerial levels, often also high staff turnover rates, the unwillingness of university graduates to enter the food and beverage sector, and the gap between what is taught in school, college, and the realities and needs of the industry itself.

The need for strengthening cooperation in the region of Julian Alps, in order to support prolonging the length of stay and changing the status of the destination from “must see” to “must experience”

As defined in the tourism strategy challenges, Bled is today primarily a “must see” destination, but the vision is to be a “must experience” destination – in order to prolong the stay, attract high value visitors, increase daily spend, and redirect the flows. Visitors, who stay longer, tend to experience more authentic and local products, go beyond the hotspots and leave more money in the process. Bled is addressing this aspect also through joint developmental and marketing

activities within Julian Alps cooperation, where the destinations are developing joint tourism products (such as recently opened Juliana Trail – encircling the Triglav National park, to ease the pressure on the mount Triglav itself; joint ski pass, cycling trails, etc.), mobility, and strongly build on the local identity and natural & cultural heritage conservation.

Carrying capacity needs summary

The carrying capacity of the destination has so far not been systematically and strategically addressed. There are no calculations in process or in place. The present tourism strategy (prepared in 2017 and confirmed in 2018) did not address this topic.

The need for carrying capacities assessment and measures came into the spotlight only in 2018 and especially in 2019. All key stakeholders in the destination agree that there is an urgent need for a structured process, in which Bled would define the carrying capacity in some of the hotspots within the destination – and Bled as a whole – and further, to define what activities the destination would like to pursue in certain locations, in order to preserve nature, biodiversity and – importantly – liveability of Bled.

The new development strategy for the municipality was to address this topic (see I.1.3), but with the new COVID-19 related situation this will be re-evaluated. This is being presently extensively discussed within the association of Julian Alps, of which Bled is a part. With expected drop in overnights in Bled in 2020 to be some 70%, the rebuilding of tourism will be a process. The stakeholders agree (the source is a Skype video conference of the 12 mayors for the Julian Alps Association in April 2020), that the situation will give all a once-in-a-generation opportunity to rebalance tourism, and to re-think how to develop tourism in future. As they agreed, destinations should not go backwards to the previous paradigm, with a focus on ever-growing visitor numbers and tourism receipts, but to put more focus on establishing a balance between economic, environmental and social factors.

I.1.3 Policy and strategic orientation

Overview of relevant policy and strategic documents

Most relevant strategic documents defining strategic and policy orientation with regard to tourism and wider socio-economic framework in the destination are:

At local/municipality level:

- Strategy of Sustainable Development of Tourism in Bled, prepared in 2018, for the period of 2018 to 2020;
- Developmental Program of the Municipality Bled, prepared in 2009 for the period of 2009 to 2020 (the process to prepare a new one has just started in February 2020);
- At regional level (these regional strategic documents are in the process of preparation in 2020);
- Integrated Transport Strategy for Julian Alps (the process is led by Posočje Development Agency; Bled Tourist Board and Municipality of Bled are active in the process; a strategic draft prepared in December 2018);
- Regional Development Plan for 2021-2027 for Gorenjska region (being prepared by BSC Kranj Development Agency);
- Local Action Plan LAS 2021-2027 (CLLD).

Analysis of relevant policy and strategic documents and information from interviews

The Strategy of sustainable development of tourism in Bled (TB, 2018) defines as the key strategic goal for Bled to become “the leading Alpine green meeting place”, with a 2025 vision for Bled to become a “unique Alpine pearl”. The strategy defines the key strategic guidelines to be: (1) decreasing the seasonality (increasing visit in winter and shoulder months, and decreasing the pressure in summer months); (2) increase of quality, (3) activation of local resources, and (4) focused tourism promotion and Bled brand use.

The strategy has not adequately covered the challenges of fast growth and increasing pressure on natural (predominantly the pressure on the Bled lake basin and the quality of the lake water) and social-cultural environment (the inhabitants are moving out from the centre, putting their houses and flats for apartments, increasingly for short term rentals). The challenges of over-tourism were brought to attention in the year after the confirmation of the strategy, when the destination recorded 1 million overnight stays.

Following the strategic guidelines, the priorities of Bled Tourist Board in 2020 and 2021 are:

- Further upgrade of the Bled mobility/guest card, with focus on winter;
- Development of trademark Bled Local selection;
- Quality upgrade across the sector;
- Development of 5-star experiences (in line with Strategy for Sustainable Growth of Slovenian Tourism 2017-2021 and Slovenian Tourist Board’s criteria for Slovenia Unique Experiences);
- Promoting knowledge, and building of competences of stakeholders;
- Increasing the destination management activities (further shift from marketing to management, in line with new roles of European DMOs);
- Developing a new concept of events (in line with the targeted position and vision);
- Marketing activities are to support the following segments: 5-star experiences, Bled Local selection, winter and outdoor activities;
- Developing outdoor infrastructure (hiking and biking);
- Soft mobility promotion;
- Implementing Slovenia Green action plan;
- Support for bigger sports events (rowing, winter swimming, biathlon, chess).

The second important strategic document is the Development program of the Municipality Bled (OB, 2009). The document is structured in 4 pillars: (1) Efficient management, reorganisation and financial stability of the municipality; (2) Green Alpine municipality (preservation of the lake and lake basin; sustainable mobility; quality space planning and nature conservation); (3) Top quality tourist destination (development of cultural and natural resources; development of relax and outdoor programs, development of MICE tourism), and (4) Vital municipality (quality living conditions and access to services for the young, families and the old; developing health, education and living programs; and entrepreneurship promotion).

The existing development strategy of the Bled Municipality is to expire in 2020, and the Municipality has just started the process of preparing a new one: Sustainable Strategy Bled 2030. Evaluation of the measures set for 2020, performed by the Municipality, shows, that 80% of the

projects were implemented. According to the interviews, the important goal that was not achieved but is relevant to tourism and the project, is that the quality of the lake water did not reach the status “good”, but remained in the “moderate” status.

The Municipality of Bled has confirmed to address this aspect in the new municipality strategy Bled 2030. The municipality councillors have in February 2020 briefly discussed three possible draft scenarios (1-Maximising potentials in tourism and minimising impacts, 2-Regulating development and active destination management, 3-Regulating, managing, limiting). The scenario that is seen as a best fit is number 2, whereas limiting should be addressed through smart and active management. It needs to be emphasised that the process of preparing the strategic document has just started and that this is just a draft working view.

As communicated through the interviews, the destination will have to: firstly, better understand and measure the costs of tourism on destination assets and infrastructure (natural, social, public, and municipal) and develop strategies to ensure these costs are “covered”. Secondly, the destination will have to calculate capacities of these assets, to efficiently manage supply and demand across the destination, in all seasons. It is also important that the destination is able to anticipate future risks and develop the destination in a way to benefit from tourism for local businesses as well as for residents.

There are some other important strategic processes in place in the destination and wider region:

- (1) The partners of the Julian Alps Biosphere Reserve, with Public Institute Triglav National Park leading the initiative, have been preparing a development plan with the aim for tourism in the area to become short-term the first industry without single use plastic (and single use articles), and transform from linear into circular economy.

Single use plastics acts in this process as a first and very important piece of the whole process. Single use plastics become an issue people can easily relate to, have an opinion about and are ready to act. They prepared an action plan defining the steps to be taken – not only in tourism industry but also in local community and other areas. Bled already has many best cases in this respect (zero waste municipality, zero waste festivals, zero waste hotel). Activities have already started.

- (2) The Association of Julian Alps is at the time of the report preparing a new development plan for Julian Alps as a sustainable tourist destination 2025, to identify the priority developmental projects for the years up to 2025.

The focus is to improve and connect sustainable mobility systems in the whole area, develop products that would disperse tourist flows in the region (such as recently opened Juliana Trail – encircling the Triglav National park, to ease the pressure on the mount Triglav itself; joint ski pass, cycling trails, etc.), increase off-season visits, prolong the stay, promote local green supply chains, and build on the local identity and natural & cultural heritage conservation.

- (3) Furthermore, Municipality Bled is active in sectoral and developmental strategies, that are being prepared (are in process in 020) and will address many of the challenges the destination is facing. These are:

- Integrated Transport Strategy for Julian Alps (the process is led by Posočje Development Agency; Bled Tourist Board and Municipality of Bled are active in the process);
- Regional Development Plan for 2021-2027 for Gorenjska region (being prepared by BSC Kranj Development Agency);
- Local Action Plan LAS 2021-2027 (CLLD).

Summary of policy and strategic priorities

Bled as a tourist destination is striving for a better balance between environmental, socio-cultural and economic pillars through new strategies that are in process.. As defined in the tourism strategy challenges, Bled is today primarily a “must see” destination, but the vision is to be a “must experience” destination – in order to prolong the stay, attract high value visitors, increase daily spend, and redirect the flows to better manage capacities. Visitors, who stay longer, tend to experience more authentic and local products, go beyond the hotspots and leave more money in the process. Bled is addressing this aspect also through joint developmental and marketing activities within Julian Alps cooperation, where the destinations are developing joint tourism products (such as recently opened Juliana Trail – encircling the Triglav National park, to ease the pressure on the mount Triglav itself; joint ski pass, cycling trails, etc.), mobility, and strongly build on the local identity and natural & cultural heritage conservation. Liveability of Bled and a superb visitor experience are top priorities.

I.1.4 Interviews

Stakeholders who are most capable of answering interview questions were identified, and interviewed. They possess knowledge of the destination’s situation, problems, needs and policies, with regard to tourism and carrying capacity as well as regional development. These interviewees are presented in the anonymised Table A.4 below.

Table A.4: Overview of interviewed stakeholders

Interviewee	Institution/organisation	Position	Contact details
Interviewee 1	DMO Tourism Bled Organisation	Director	Upon request
Interviewee 2	Municipality Bled	Director of Municipal Administration	Upon request
Interviewee 3	DMO Tourism Bled Organisation	One of 2 Green team coordinator at DMO Tourism Bled	Upon request
Interviewee 4	The Julian Alps Association and DMO Tourism Bohinj	Coordinator of The Julian Alps Association and Director at DMO Tourism Bohinj	Upon request

Source: Consortium, 2020

Interviews covered general questions related to the destination formulation, destination strategy, and the sustainable tourism approach, as well as more specific questions related to the carrying capacity dimension and to sustainability challenges. The information collected during interviews has been integrated into the overview of the destination provided in step 1.

I.2 Step 2

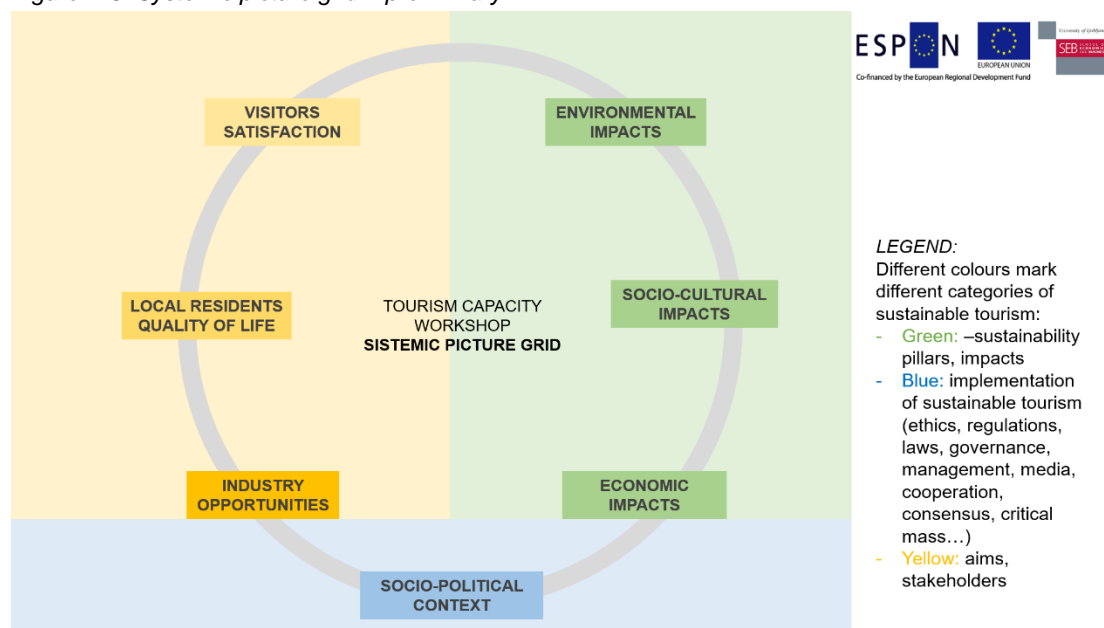
I.2.1 Development of a systemic picture

Preliminary systemic picture

For the destination workshop SEBLU operationalised the carrying capacity methodology and prepared the systemic picture grid and indicators catalogue for destination’s experts. Experts have been trained to use the same methodological approach in all four destinations. All experts participated at the first workshop, held for Bled pilot destination. After the meeting, the

evaluation confirmed the proposed methodological approach. All elements of systemic grid (systemic picture) have been well addressed.

Figure A.6: Systemic picture grid – preliminary



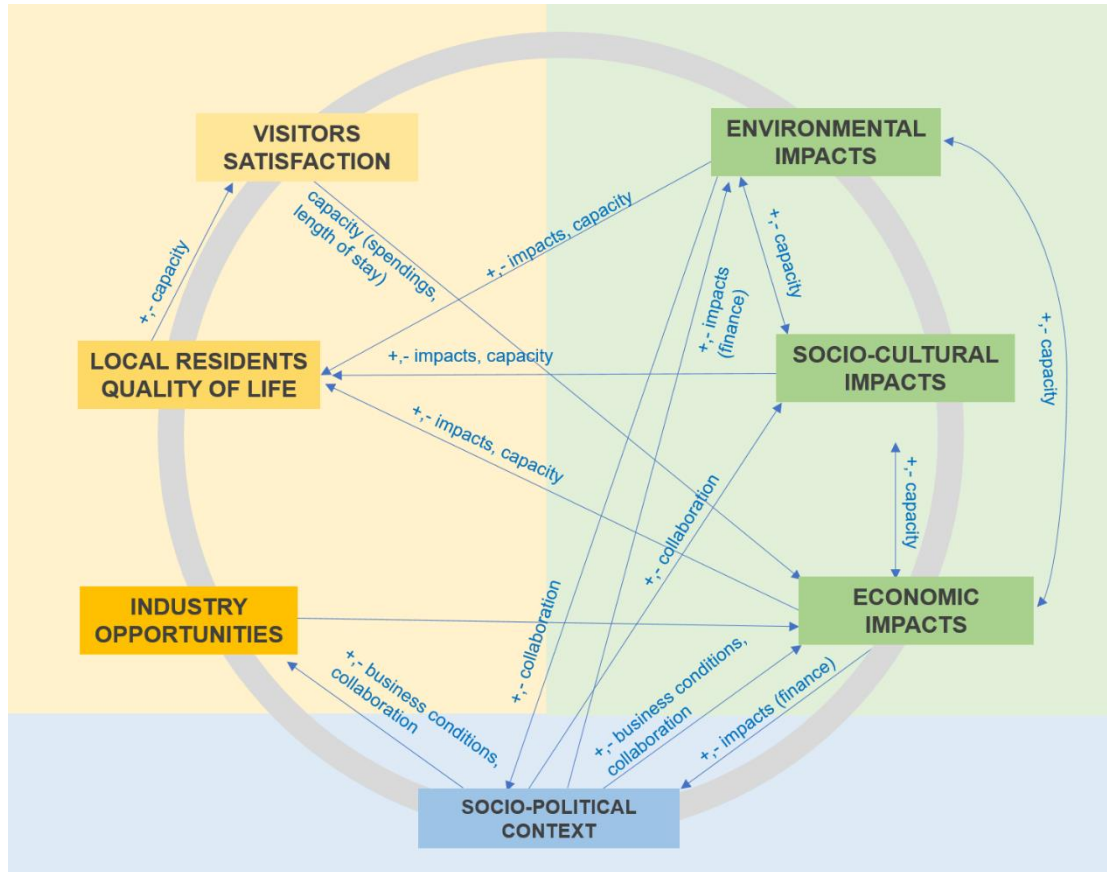
Source: Consortium, 2020.

The systemic picture grid offers a platform for discussion areas for destination’s stakeholders to focus on capacity, impacts and challenges, from different perspectives. Green elements refer to sustainability pillars and impacts of tourism in the area of each (environmental, socio-cultural and economic). Yellow fields mark the destination’s main participants and their satisfaction with tourism presence and opportunities in the given destination. The socio-political context, coloured blue, captures the whole dimension of destination’s management (including governance and leadership), collaboration among destination’s stakeholders, consensus building, strategy, legislation, sustainability awareness, etc.

Figure A.7 represents the preliminary systemic picture grid, showing interlinkages between individual categories.

Before the workshop, the expert prepared a specific preliminary systemic picture for the destination Bled. However, the systemic picture (with defined categories) was not shared with participants in the form of systemic picture (filled in systemic grid), but only through introduction to the workshop, in order to give an informed and structured inputs for the work on the systemic picture (in the first part of the workshop) and indicators (in the second part of the workshop).

Figure A.7: Systemic picture grid – example



Source: Consortium, 2020.

I.2.2 Identification of context indicators

The indicators catalogue has been prepared prior to the workshop, to inform the expert workshop moderators (Consortium, 2020; ESPON SEBLU, 2020). The catalogue consists of the Consortium, 2020, ETIS, GSST, CRP and national and destination tourism statistical data (and calculations).

The appropriate context indicators, selected for Bled based on the systemic picture, are presented in Table A.5.

Table A.5: Overview of availability of context indicators – proposal for Bled

Indicator	Source	Territorial unit	Time	Comments
Area km ²	SORS, destination	Municipality	Annually	Available
Population	SORS, destination	Municipality	Annually	Available
Number of persons in paid employment	SORS, destination	Municipality	Annually	Available
Turnover of enterprises (EUR 1,000)	SORS, destination	Municipality	Annually	Available
Number of enterprises	SORS, destination	Municipality	Annually	Available
Density of population (per km ²)	SORS, destination	Municipality	Annually	Available
Registered unemployment rate (%)	SORS, destination	Municipality	Annually	Available
Natural increase (per 1,000 population)	SORS, destination	Municipality	Annually	Available
Ageing index	SORS, destination	Municipality	Annually	Available
Average monthly gross earnings (index, SI=100)	SORS, destination	Municipality	Annually	Available
Employment/population ratio (%)	SORS, destination	Municipality	Annually	Available

Indicator	Source	Territorial unit	Time	Comments
Municipal waste collected (kg/person)	SORS, destination	Municipality	Annually	Available
WIFI access	Tourism 4.0	Municipality	Annually	If available
Mobile data access	Tourism 4.0	Municipality	Annually	If available
Bus tickets sold	Public/private authorities	Municipality	Annually	If available
Railway tickets sold	Public/private authorities	Municipality	Annually	If available
Fishing permits sold	Fishing association	Municipality	Annually	Available
Air quality data	ARSO	Municipality	Annually	If available
Lake water quality	ARSO	Municipality/ lake	Annually	Available

Source: Consortium, 2020 and SEBLU ESPON project, 2020

1.2.3 Identification of tourism indicators and data

During the workshop, the best fitting indicators for Bled with regards to tourism were identified and are presented in Table A.6.

Table A.6: Overview of availability of tourism indicators – proposal for Bled

Indicator name	Source	Territorial unit	Time	Comments
Importance of tourism (1): % of tourism in GDP of the destination	Municipality data/ AJPES	Municipality	Yearly	If available
Importance of tourism (2): % of tourism employees in total employment in the destination	Municipality data/ AJPES	Municipality	Yearly	If available
Amount of tourist tax paid	Municipality data	Municipality	Yearly	Available
Amount of concessions paid	Municipality data	Municipality	Yearly	Available
Percentage of tourism enterprises taking actions to reduce water consumption	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises separating different types of waste & reducing the amount of total waste	Municipality data	Municipality	Yearly	If available
Number of zero waste tourism providers	Municipality data	Municipality	Yearly	If available
Number of zero waste events	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises that take actions to reduce energy consumption	Municipality data	Municipality	Yearly	If available
Number of tourism providers with SLO- VENIA GREEN certificate	Tourist Board data	Municipality	Yearly	Available
Tourism density – destination	SORS	Municipality	Yearly, monthly	Available
Tourism intensity – destination	SORS	Municipality	Yearly, monthly	Available
Visitation concentration per day or season – on identified hotspots needing management	Municipality data	Municipality	Yearly	If available
Residents' satisfaction with tourism – in different seasons	Municipality data	Municipality	As per conducted survey	Available, GSST (every 3 years)
Visitors' satisfaction with visitation	Municipality data, data on Tripadvisor and booking portals	Municipality	As per conducted survey	Available, GSST, available on Trip Advisor and booking portals

Indicator name	Source	Territorial unit	Time	Comments
Arrivals seasonality	SORS	Municipality	Yearly, monthly	Available
Number of tourists/visitors per 100 residents	Municipality data	Municipality	yearly	If available
Visitors – per attraction	Attraction operator	Attraction	Yearly, monthly	If available
Arrivals: Number	SORS	Municipality	Yearly, monthly	Available
Overnights: number	SORS	Municipality	Yearly, monthly	Available
Average length of stay	SORS	Municipality	Yearly, monthly	Available
Arrivals growth: %	SORS	Municipality	Yearly, monthly	Available
Overnights growth: %	SORS	Municipality	Yearly, monthly	Available
Visitors – destination	SORS	Municipality	Yearly, monthly	Available
Average length of stay	Municipality data	Municipality	Yearly	If available
Number of beds in hotels per resident	Municipality data	Municipality	Yearly	If available
Growth in number of beds in hotels in the last 5 years in %	Municipality data	Municipality	Yearly	If available
Number of beds in tourist farms per resident	Municipality data	Municipality	Yearly	If available
Growth in number of beds in tourist farms in the last 5 years in %	Municipality data	Municipality	Yearly	If available
Tourism industry satisfaction with tourism opportunities	Municipality data	Municipality	As per conducted survey	Available, GSST (check confirmed that quantitative data is not available)
Number of new businesses and persons involved in tourism	Municipality data	Municipality	Yearly	If available
Number of visitors from Bled joining the regional products	Municipality data	Municipality	Yearly	If available
Number of visitors trying Local Bled Selection	Tourist Board data	Municipality	Yearly	If available
Number of visitors buying/having Julian Alps/Bled Guest Card	Tourist Board data	Municipality	Yearly	Available

Source: Consortium, 2020

I.2.4 Systemic Picture Workshop

Participants

The workshop brought together most important key stakeholders in the destination, because the topic is of high priority and relevance. Various stakeholders have not confronted their views in a safe and facilitated environment recently. The workshop provided the circumstances for discussing many challenges and for finding solutions. The key stakeholders, from different public, private and non-government organisations, discussed this topic and its relevant aspects. The expert had to actively facilitate the workshop, establish safe space, and manage different views – in order to be able to cover all seven aspects of the systemic picture, and not stay only with the most pressing ones. The atmosphere of the workshop was very positive and all

stakeholders understand the importance to be unified in their strategy and measures. In general, the workshop was very productive, but the time was limited.

Table A.7: Overview of participants present in the workshop, Bled, 10 March 2020

Participant	Institution/organisation	Position
Participant 1	Municipality Bled	Mayor
Participant 2	Municipality Bled	Director of Municipality Administration
Participant 3	Bled Tourist Board	Director
Participant 4	Bled Tourist Board	Green Coordinator
Participant 5	Slovenian Environmental Agency	Person responsible for the quality of lake waters
Participant 6	Parish Bled (manager of the Bled island)	Priest
Participant 7	Association Let's respect Bled/Spoštujmo Bled	President
Participant 8	Association Let's respect Bled/Spoštujmo Bled	Member
Participant 9	Association of Caves Bled	President
Participant 10	Association for Nature Protection Bled	President
Participant 11	School Hotel Bled Astoria	Director
Participant 12	K&Z Consulting	Project Manager for the new Bled 2030 strategy
Participant 12	NGO Bled	Member
Participant 13	Tourist Association Bled	President
Participant 14	Agency for Nature Protection Kranj	Director
Participant 15	ESPON SEBLU expert	ESPON SEBLU expert
Participant 16	ESPON SEBLU expert	ESPON SEBLU expert
Participant 17	ESPON SEBLU expert	ESPON SEBLU expert

Source: Consortium, 2020

Please note: due to the coronavirus situation, some of the participants were not able to participate (but who previously confirmed cooperation): Sava Hotels & resorts, as the representative of bigger accommodation providers.

Outcomes of the Systemic Picture Workshop

Discussion of destination's needs as well as policy and strategic orientation

Validation of needs assessment

How did the participants assess expert assessment of destination's needs? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

At the beginning of the workshop, the expert briefly outlined the main aspects of the destination analysis (tourism statistics and challenges), as a starting point for more informed discussion.

In the subsequent discussion, the most highlighted issues by stakeholders, as expected from understanding the destination's most pressing challenges (outlined also in the Step 1 interviews), were the quality of the lake water and the socio-political aspect. The issue of lake water quality has been top priority since February/March 2020. A dedicated body of professionals had

been appointed for this topic by the Municipality Bled Mayor in February 2020, comprised of different stakeholders and professionals, and the first meeting on lake water quality was held just a few days prior to the ESPON workshop. Many stakeholders attended both workshops.

However, the methodological approach in the ESPON workshop approached the topic from all aspects: not only environmental, but also socio-cultural, economic, and political-participative, as well as from the perspective of the quality of residents' life and the quality of experience (see the systemic picture methodology).

Validation of policy and strategic orientation

How did the participants assess expert assessment of destination's policy and strategic orientation? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

The ESPON SEBLU expert's assessment in the introductory part of the workshop was appropriate and well informed (the expert has been present in the closed advisory body discussion on the quality of lake water just a few days prior to the workshop; and the expert is also working with the destination in the Sustainable Strategy Bled 2030 project, and with the destination Julian Alps on their new sustainable strategy 2025).

The participants agree that there is a need for a structured policy process, in which Bled would define the carrying capacity in some of the hotspots within the destination – and, importantly, for Bled as a whole – and further, to define what activities the destination would like to pursue in certain locations, in order to preserve nature, biodiversity and liveability at Bled. This process will be led through the new Bled 2030 strategy. The biggest challenge is to balance different stakeholders and their needs, which most evident in the case of Lake Bled (activities in the lake/in the lake basin, which have an impact on the quality of water).

Final systemic picture

What was particularly striking/interesting difference between expert systemic picture and those prepared by participants?

The ESPON SEBLU expert had a very well-informed insight into the destination (its situation, challenges, needs, stakeholders' views, strategies, projects, etc.), which enabled good preparation of the systemic picture and efficient and focused work .

However, it became evident that not all stakeholders have all necessary information and often tend to jump to wrong or unknowledgeable conclusions. The expert has mitigated rush conclusions by presenting data and leading evidence-based discussions.

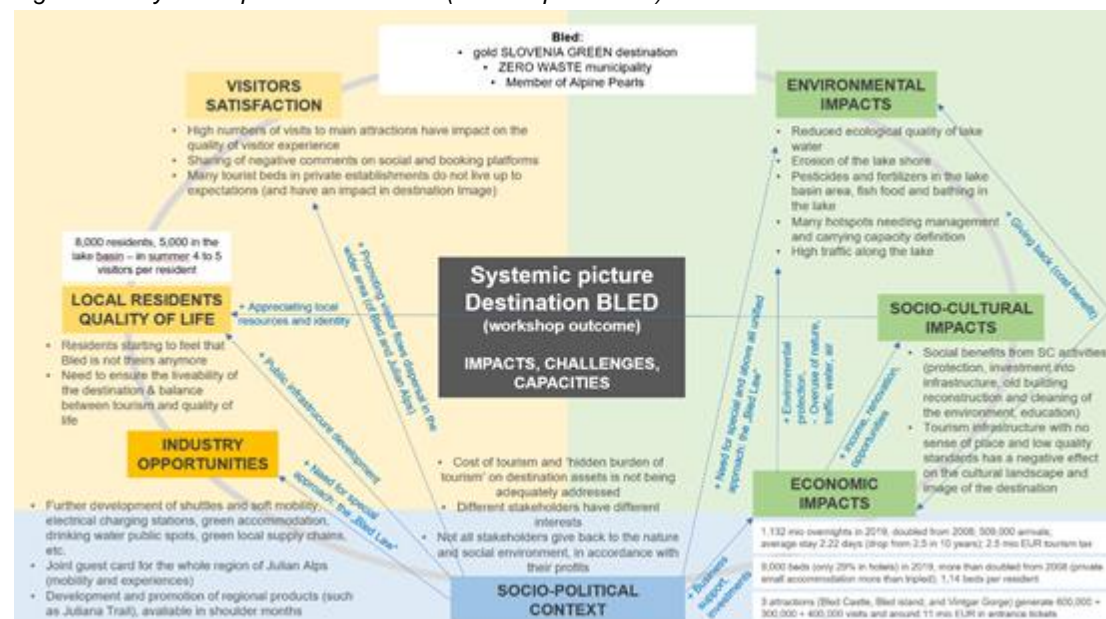
What important points about the systemic picture did the group work and discussions centre around?

Workshop's participants addressed all the elements of the proposed systemic picture grid (Figure A.6) and discussed the interlinkages and impacts between different categories (Figure A.7). The categories are, as expected, interdependent and often certain situations (impacts, challenges, and capacities) have impacts on various categories. No irrelevant or new issues or topics, relative to expert's proposal, have been identified at the workshop.

The discussion has been moderated by design thinking approach and resulted in a number of observations, comments, views, challenges, and impacts, as presented in Figure A.8. Participants discussed capacities, impacts and challenges for the seven categories – first through individual work (preparing ideas/views on stick-it posts), and then through group discussion: commenting views, adding to them, supporting them. In the third phase, all stick-it posts were attached to the wall and were grouped. When all impacts/challenges were documented, a coordinated plenary discussion was facilitated.

The destination specific characteristics have been discussed and new information and clarifications have been added in the discussion. For example, the stakeholders for the first time evaluated and documented the visitor numbers for all important spots/attractions (paid attractions as well as visits to certain locations that are not monitored and managed). However, due to the time limit, the discussion had to be focused and often stakeholders had to be reminded to stay on track. The final systemic picture presented is presented below.

Figure A.8: Systemic picture Bled – final (workshop outcome)



Source: Bled destination workshop, 10.3.2020

Analysis of the systemic picture

What important points about the systemic picture did the group work and discussions centre around?

The following points, impacts and challenges with regards to different dimensions of the destination's development and tourism management are presented below:

Environmental impacts	<p>Impacts</p> <ul style="list-style-type: none"> - The reduced ecological quality of lake water (high level of phosphorus, reduced transparency of the water, oxygen situation – overburden of organic substances, visually changed colour to the lake from blue to red/brown) - Noise and light pollution - Swimming in the lake takes place outside dedicated zones and bathing areas; destruction of the lake soil and of biodiversity - Erosion of the lake shore - Use of pesticides and fertilizers in the lake basin area (they are being washed into the lake) - Construction projects around the lake taking place (e.g. at the fish farm); with negative direct impact on the water quality - Carp fishing in the lake (and impact that the activity has on the shores, despite reductions in number of permits to 10 a day; prohibition of tents, cooking in the open space, etc. - Fish food (around 10 tons of fish food is put into the lake annually) - Around 300,000 bathers annually have an effect on the water (sunbathing creams and sweat) - Carrying capacities for hotspots are still not determined and managed (but methodology is being prepared for Vintgar Gorge, together with TNP) - Too many activities going on in the Sava Dolinka valley (zipline Dolinka, rafting) - The swans that have always been a symbol of Bled are nearly gone (only one swan still living in the area) - Inappropriate construction interventions and landscape planning of the lake shore - Out of date lake hydraulic system (the so called “natega”), with not sufficient capacity; build in 1981, but has not been updated since - High traffic along the lake, from Bled to Bohinj - The municipality sewer system has still not been fully updated - Parking places still remain in prime locations (lake basin) - Increased pressures (visitation) on new nature spots that are emerging, with many being overcrowded already (problem of parking places that are not being arranged, ticketing) - Limiting capacity in one hot spot has an impact on another – the flows need to be redistributed (limitation in one spot establishes higher visitation in another) - Around 250 buses daily in the centre of Bled in high season (who travel/encircle the destination a few times) - Climate changes (green winters, higher temperatures – the lake does not freeze anymore, nature has no opportunity to recuperate) <p>Challenges</p> <ul style="list-style-type: none"> - Visitor management and carrying capacity definition for hotspots and understanding the interdependence - Increasing the quality of water from “moderate” to “good” - Management of new nature points of visits/tourist public infrastructure construction at nature points of interest and its maintenance - Private land – how to prohibit the use fertilizers - Access to the island for the manager of the island infrastructure (for deliveries) - Southern bypass construction and other important infrastructure projects (dependency on the government for some major projects) - Implementing zero waste and no single-use plastic approach in tourism and in other sectors
Socio-economic impacts	<p>Impacts</p> <ul style="list-style-type: none"> - Social benefits from SC activities (protection, investment into infrastructure, old building reconstruction and cleaning of the environment, education) - Tourism infrastructure with no sense of place and high quality standards has a negative effect on the cultural landscape and image of the destination - Promoting local identity through projects like Local Selection Bled - Defining the social carrying capacity for Bled (4 tourist/visitors per one resident in the lake basin in high season) <p>Challenges</p> <ul style="list-style-type: none"> - Cultural landscape that appreciates the identity of Alpine space and is not based only upon economic factors; need for clear monument protection guidelines, but this increases costs of reconstruction - Tourism as a catalyst for better quality cultural building heritage reconstruction - Improving the local identity (of place, people, buildings)

Economic impacts	<p>Impacts</p> <ul style="list-style-type: none"> – Substantial money from tourism tax (around EUR 2.5 mio. in 2019), casinos concessions, and tourist attractions (Bled Castle 600,000 visits, Vintgar Gorge 400,000 visits, Bled lake 200,000 visits, Straža 50,000 visits, to name the biggest ones) – Lack of transparency in terms of numbers of attraction visits <p>Challenges</p> <ul style="list-style-type: none"> – Need for quality upgrading of small accommodation providers (green, boutique, 4* and more) – Prolonging the stay (from present 2.2 days) – Balancing the needs and impacts of one-day visitors (who are important visitor attractions generators), versus overnight tourists and locals – Reducing dependency on tour operators/tourist agencies <ul style="list-style-type: none"> – Reducing dependency on booking platforms (promoting direct bookings)
Socio-political aspect	<p>Impacts</p> <ul style="list-style-type: none"> – Costs of tourism and “hidden burden of tourism” on destination assets is not being adequately addressed – Lack of sufficient infrastructure to deal with tourism demand (especially in peak times) – Different stakeholders have different interests – Not all stakeholders give back to the nature and social environment, in accordance with their profits – Exploitation of nature and culture – unbalance in terms how much is given/invested back – Various stakeholders have not confronted their views in a safe and facilitated environment recently (with many challenges being more pressing), focused on finding solutions – Ideological discrimination, felt by the manager of the Bled island (Bled Parish) – Media often writes about problems with overtourism – often poorly managed communication <p>Challenges</p> <ul style="list-style-type: none"> – Being unified in solutions – need to step together to be able to come to solutions – Acknowledgement of those tourism providers that dedicate themselves to guests and provide individual and higher-quality service – the destination cannot prosper through any other approach – Agencies and professionals at ministries are not being heard by those preparing legislation and measures – Increasing the visibility of Bled – also through the “Bled law” (“Zakon o Bledu”)
Local residents quality of life	<p>Impacts</p> <ul style="list-style-type: none"> – Residents starting to feel that Bled is not theirs anymore – Traffic jams, which triple the time of commuting from work in Ljubljana in high season – High concentration of hostels (late night drinking and noise) – Increase of real estate prices – High density of Airbnb rentals (and local residents moving out of the Bled centre for the benefit or renting out their apartments/houses) – In high season there is an increasing negative attitude to tourism (different results of questionnaires, dependant on the time of the year in which it is performed) – Decreasing the quality of cultural landscape – Visual pollution of the destination <p>Challenges</p> <ul style="list-style-type: none"> – Liveability & balance between tourism and quality of life
Tourism industry opportunities	<ul style="list-style-type: none"> – Prolonging the stay at Bled – Co-dependence in the region (more cooperation and understanding of the impacts) – High-value traveller – Tourist flows dispersal (time and geography wise) – Further development of shuttles and soft mobility, electrical charging stations, green accommodation, drinking water public spots, green local supply chains, etc. – Joint guest card for the whole region of Julian Alps (mobility and experiences) – Development and promotion of regional products (such as Juliana Trail) and local products

Visitor satisfaction	<p>Impacts</p> <ul style="list-style-type: none"> – High numbers of visits to main attractions have impact on the quality of visitor experience – High number of tourist beds in private establishments which do not live up to expectations and are lower quality have a negative impact on the image of the destination – Sharing of negative comments on social and booking platforms <p>Challenges</p> <ul style="list-style-type: none"> – Increasing the image of destination from 3/4* to 5*
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Identification and verification of indicators and data sources

How did the participants assess the expert suggestion on indicators and data sources?

The carrying capacity indicators (from the indicators catalogue, as prepared by the ESPON SEBLU experts) have proven relevant. Bled is already a member of GSST – with all GSST indicators already being monitored.

Additional comments and observations

The challenges discussed will be further addressed within the process of preparation of Sustainable Strategy Bled 2030.

The new development strategy for the municipality was to address this topic (see Step 1, I.1.3), but with the new COVID-19 related situation this will be re-evaluated. This is being presently extensively discussed within the association of Julian Alps, of which Bled is a part.

With expected drop in overnights in Bled in 2020 to be some 70%, the rebuilding of tourism will be a process. The stakeholders agree (the source is a Skype video conference of the 12 mayors for the Julian Alps Association in April 2020), that the situation will give all a once-in-a-generation opportunity to rebalance tourism, and to re-think how to develop tourism in future. As they agreed, destinations should not go backwards to the previous paradigm, with a focus on ever-growing visitor numbers and tourism receipts, but to put more focus on establishing a balance between economic, environmental and socio-cultural factors.

I.3 Step 3

I.3.1 Data collection

The data collection is based on Table A.5 and Table A.6 (see step 2) which include the identified context and tourism indicators. The suggested indicators are based on the municipality level with one exception the lake water quality which is an indicator for Lake Bled. In order to identify the most important indicators from the stakeholder perspective the involved stakeholders indicated 16 indicators upon their availability and importance for their tourism destination which represent their preferences (see Table A.9).

Table A.8: Most important indicators for the stakeholders in Bled

Indicator name	Source	Territorial unit	Time	Access to the data ³	Data integrated in the Dashboard
Arrivals	SORS	Municipality Bled	Yearly, monthly	yes	yes
Overnights	SORS	Municipality Bled	Yearly, monthly	yes	yes
Length of stay	SORS	Municipality Bled	Yearly, monthly	yes	yes
Arrivals growth	SORS	Municipality Bled	Yearly, monthly	yes	yes
Overnights growth	SORS	Municipality Bled	Yearly, monthly	yes	yes
Visitors at attractions	Attraction operator	Municipality Bled	Yearly, monthly	no	no
Tourism density	SORS	Municipality Bled	Yearly, monthly	yes	yes
Tourism intensity	SORS	Municipality Bled	Yearly, monthly	yes	yes
Arrivals seasonality	SORS	Municipality Bled	Yearly, monthly	no	no
Number of tourism providers with Slovenia Green certificate	Tourist Board Data	Municipality Bled	Yearly	yes, but only for the year 2020	yes
Lake water quality	ARSO	Lake Bled	Annually	yes	no
Visitation concentration per day or season – on identified hotspots	Municipality data	Municipality Bled	Yearly	no	no
Residents' satisfaction with tourism – in different seasons	Municipality data	Municipality Bled	As per conducted survey	no	no
Number of tourists/visitors per 100 residents	Municipality data	Municipality Bled	Yearly, monthly	yes (but only for tourists, not visitors)	yes (but only for tourists, not visitors)
Number of visitors from Bled joining the regional products in Julian alps	Municipality data	Municipality Bled	Yearly	no	no
Number of visitors buying/having Julian Alps/Bled Guest Card	Municipality data	Municipality Bled	Yearly	no	no

Source: Consortium 2020

Overall, data for eight of the pre-selected indicators in Table A.9 were collected by the project team and seven are integrated in the database (Water quality is the indicator which is not integrated in the database for the Dashboard since it is location specific and is therefore not a

³ Access to the data is only given if the data is open access data.

benchmarking indicator). Table A.10 provides an overview of the 24 indicators included in the database for all Slovenian municipalities. The eight selected indicators which are based on the stakeholders preferences are included in Table A.10.

Table A.9: Indicators in the database (alphabetical order)

Indicator	Time series for Bled
Ageing	2008-2019
Population >=65/Population <=14	
<Methodological Explanations: Slovenia>	
Arrivals	2008-2019
Tourist Arrivals	
<Methodological Explanations: Slovenia>	
Arrivals Change, Overnights Change	2008-2019
Annual Change in %, Base Year is Previous Year	
Bedspaces	2008-2017
Number of Indivisible Units and Bedspaces that are Available to Tourists	
<Methodological Explanations: Slovenia>	
Bedspaces Change	2008-2017
Annual Change in %, Base Year is Previous Year	
Bedspaces Intensity	2008-2017
Bedspaces/Population	
Employment	2005-2019
Persons in Employment by Municipalities of Employment	
<Methodological Explanations: Slovenia>	
Employment Ratio	2002-2016
% of Labour Force within the Working Age Population	
<Methodological Explanations: Slovenia>	
Enterprises	2008-2018
Number of registered legal or natural person, which had either turnover or employment or investments during the reference year.	
<Methodological Explanations: Slovenia>	
Green Certificate	2020
Tourism Providers with Slovenia Green Label	
<Methodological Explanations: Green Scheme of Slovenian Tourism>	
Income	2005-2019
Average Monthly Cross Earnings	
<Methodological Explanations: Slovenia>	
Length of Stay	2008-2019
Overnights/Arrivals	
Natural increase	1995-2018
Difference between the Number of Births and Deaths	
<Births – Methodological Explanations: Slovenia> <Deaths – Methodological Explanations: Slovenia>	
Overnights	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Overnights change	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	

Indicator	Time series for Bled
Population	2008-2019
<Methodological Explanations: Slovenia>	
Population density	2008-2019
Population/Square Kilometer Surface	
Seasonality	2008-2019
Gini Coefficient based on Monthly Bednights	
Surface	2020
Square kilometre surface covered by the municipality's borders	
Tourism Density	2008-2019
Arrivals/Square Kilometer Surface of the Municipality	
Tourism Intensity	2008-2019
Arrivals/Population	
Turnover	2008-2018
<p>...of enterprises (1,000 EUR) is the total amount that the enterprise settled with sale of goods, material and performed services in the reference year. It is measured on the basis of selling prices stated on invoices and other documents less discounts at sale or later on and the value of returned quantities. It includes all costs and charges linked to the buyer and excludes all duties and taxes on the goods or services invoiced by the unit and value added tax, possible sale of fixed assets, financial turnover, subsidies and other extra turnover. Data on turnover of enterprises from 2013 also included turnover of banks and savings banks.</p>	
<Methodological Explanations: Slovenia>	
Unemployment	2005-2016
% of Registered Unemployed within the Active Population	
<Methodological Explanations: Slovenia>	
Waste	2008-2018
Municipal Waste Collected by Public Waste Removal Scheme (kg/capita)	
<Methodological Explanations: Slovenia>	

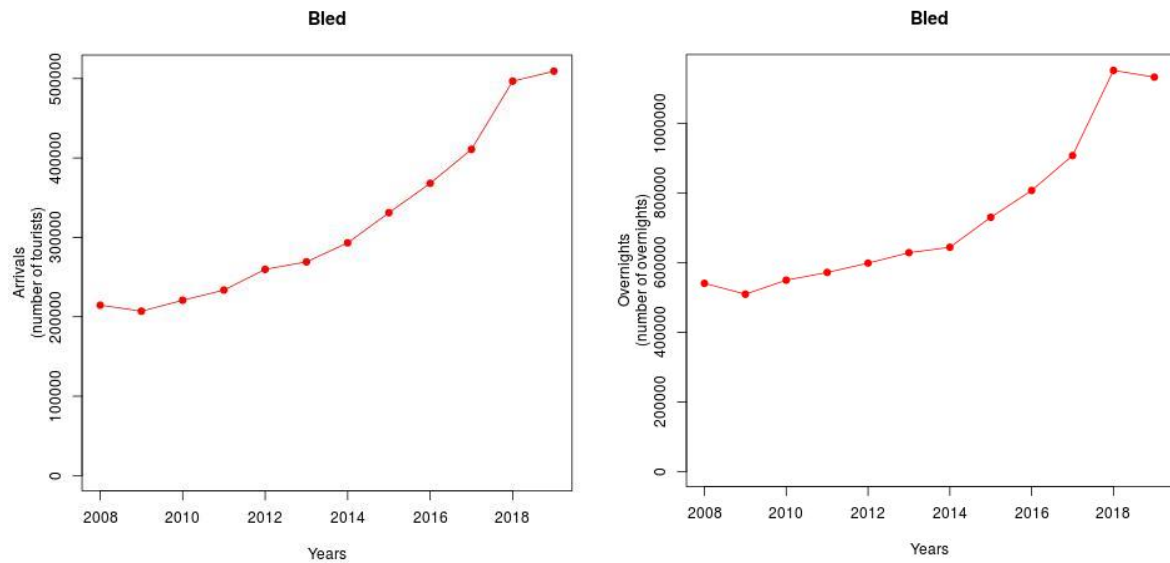
Source: *Consotium 2020*

I.3.2 Tourist flow estimation

The tourist flow estimation can be based on a variety of available indicators in the database, i.e. arrivals, arrivals change, length of stay, seasonality. Note: scale of y-axis may differ between the plots for two municipalities, so one should take that into account in interpretations.

The development of arrivals over time is after the consequences of the economic crisis in 2008 characterized by a steadily increase from originally 214,558 arrivals to more than 509,247 in 2019 (see Figure A.9 left). The years 2013 -2018 show steep increases. However, there are structural changes in tourism visible since the number of overnights dropped between 2018 and 2019 (see Figure A.9 right). There is a general trend towards one day visits and shorter stays which will affect the accommodation infrastructure and logistics (see Figure A.11). More tourists who stay on average shorter in the destination often around the weekend will lead to crowding effects over the weekend and vacancy during the rest of the week and will lead to capacity limits.

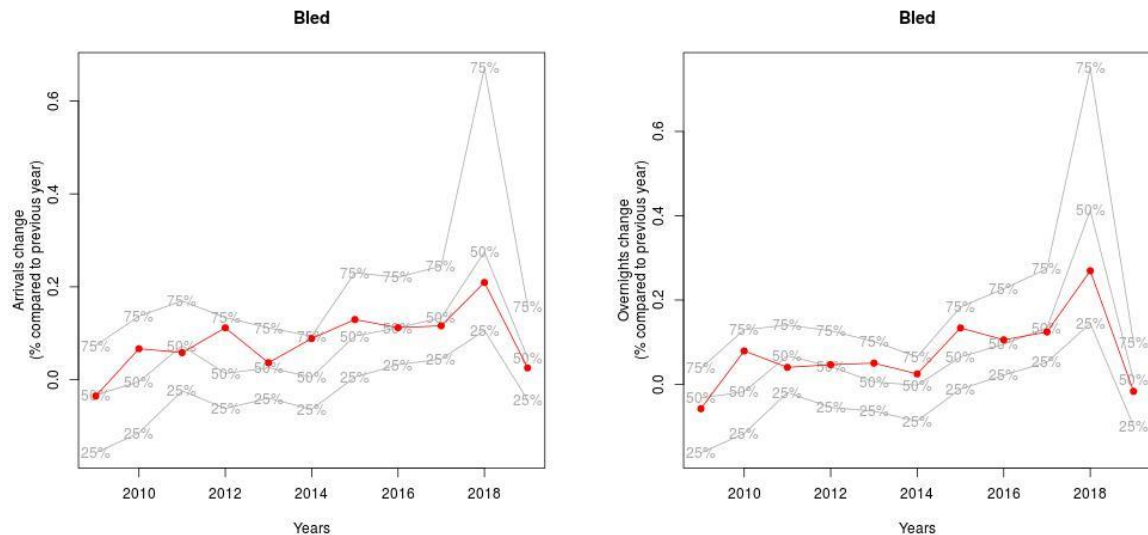
Figure A.9: Arrivals and Overnights in Bled 2008-2019



Source: Consortium 2020

Figure A.10 visualizes arrivals and overnight change in Bled and shows that Bled’s development corresponds to the Slovenian national average as its trend is in line with the most typical Slovenian destination along the 50% markers splitting destinations above-average from those below average.

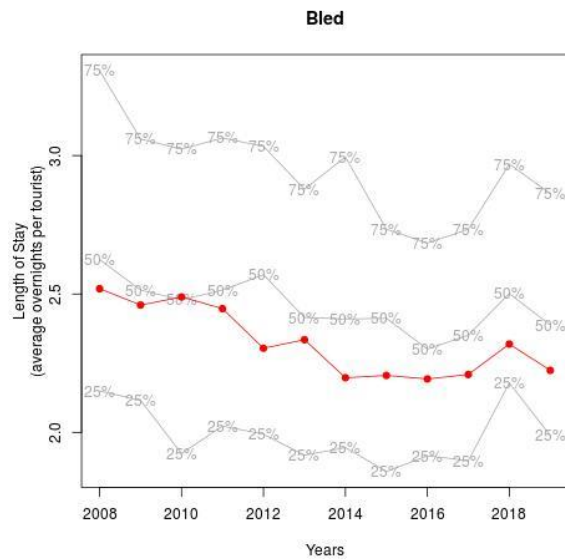
Figure A.10: Arrivals change in Bled benchmarked with all other municipalities in Slovenia



Source: Consortium 2020

The average length of stay in Bled is characterized by a constant decline from 2008 to 2019 which is only interrupted in 2013 and 2018 by a slight increase (see Figure A.11). This indicates a trend towards shorter trips where tourists stay only for two to three days. Such shorter stays demand capacity related flexibility if the trips are located around the weekend. Special offers during the week might help to attract tourists outside the crowded weekend days.

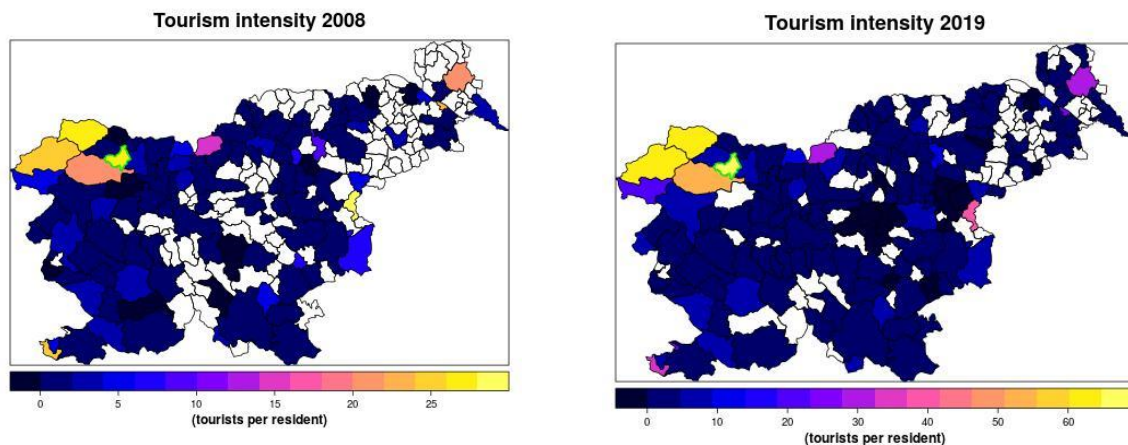
Figure A.11: Length of stay in Bled benchmarked with all municipalities in Slovenia



Source: Consortium 2020

Overall Bled is a tourism hotspot in Slovenia as can be seen in Figure A.12 which visualizes the tourism intensity (arrivals/population) for the years 2008 and 2019. Bled (highlighted with a green border) always belonged to the destinations with the highest tourism intensity however the increase over time exploded in Bled between 2008 (26.4) and 2019 (64.9) which definitely impacts local residents negatively and has to be monitored in terms of sustainability.

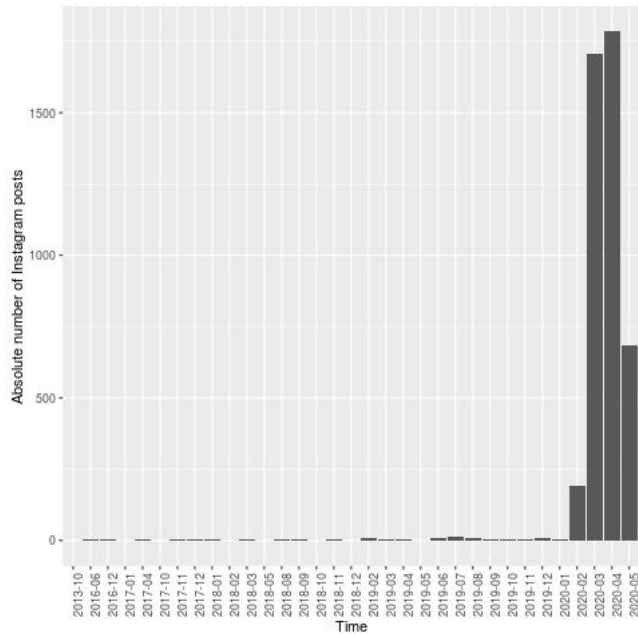
Figure A.12: Tourism intensity 2008 and 2019



Source: Consortium 2020

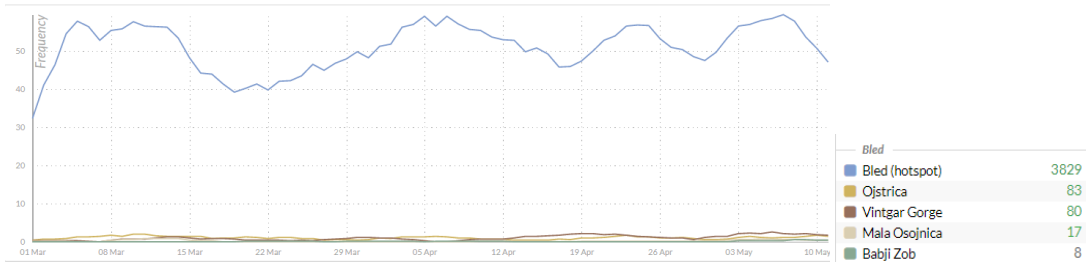
In order to find a proxy for the indicator visitor per attraction Instagram posts were used and analysed. Figure A.13 provides an overview of the most current 10,000 Instagram posts over time for Bled (advertisements etc. have been deleted to stress the focus of the tourists' opinion).

Figure A.13: Instagram posts over time (Bled)



Source: Consortium 2020

Figure A.14: Frequency of Instagram posts for POIs in Bled



Source: Consortium 2020

Figure A.14 visualizes the frequency of Instagram posts (7 day moving average) for each POI (Top Bled municipality POIs: Bled (hotspot) aggregates posts from the town, lake, island and castle; Ojstrica mountain; Vintgar Gorge; Mala Osojnica hill; Babji Zob rock) since 1/3/2020 until 11/5/2020. Bled itself (blue line) is by far the main source of Instagram posts. Main associations in posts with each POI are visualized in Figure A.15. The colour code is based on Figure A.14. It shows that Bled (blue colour) is strongest associated with the lake.

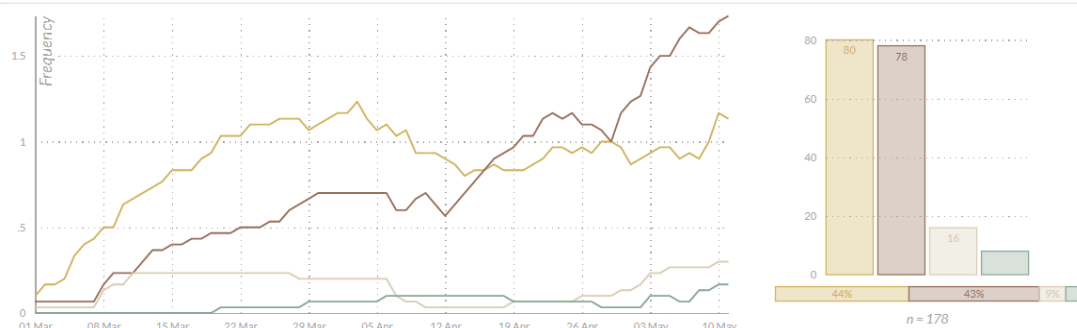
Figure A.15: Main associations in posts with each POI



Source: Consortium 2020

A comparison of frequency of posts of all non-Bled POIs is visualized in Figure A.16. As can be seen Ojstrica and Vintgar Gorge are roughly equal in number of posts (although both far behind Bled itself). There are much less posts from Mala Osojnica and Babji Zob.

Figure A.16: Frequency of post of all non-Bled POIs



Source: Consortium 2020

This Instagram posts analysis clearly shows that there is an issue to better distribute tourism in Bled municipality away from only the lake area. Both Vintgar Gorge and Ojstrica have potential for nature lovers (note associations with terms like “landscapes”, “pictures”, “sunrise” and “view-point”) but may need more promotion to incoming visitors to be perceived as attractive additional POIs.

I.3.3 Tourist flow prediction

Out-of-sample annual forecasts for arrivals and overnights for the next three years are produced using the “forecast” package for R and its “forecast” function). In more detail, point and interval forecasts (80% and 95% confidence intervals) are calculated for a forecast horizon of three periods ahead, while being robust against missing values and outliers in the forecast variable. The forecast model employed is selected automatically from a range of 30 different forecast specifications.

Figure A.17 visualizes a three years prediction for the indicator arrivals which increased steeply between 2008 and 2019. The forecast shows that arrivals will most likely remain the same within the next three years which would allow the destination to balance between tourist inflow and satisfaction of residents. However, since historical data are only available until 2019, the COVID-19 pandemic of 2020 cannot be depicted in this forecast.

In comparison overnights will further increase according to the three years forecast (see Figure A.18). However, since historical data are only available until 2019, the COVID-19 pandemic of 2020 cannot be depicted in this forecast.

Figure A.17: Arrivals forecast (Bled)

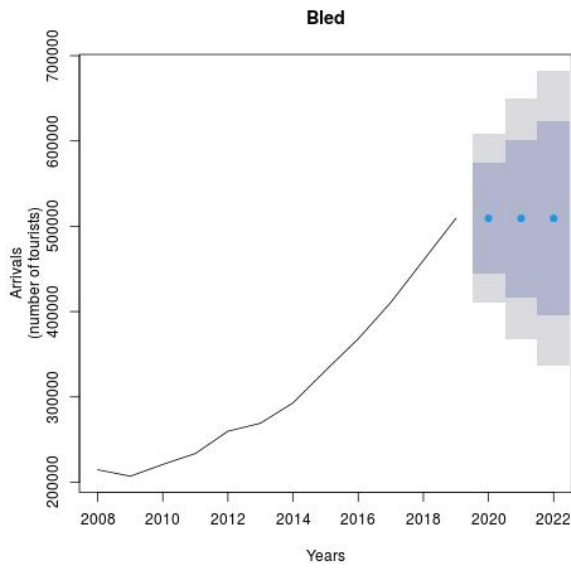
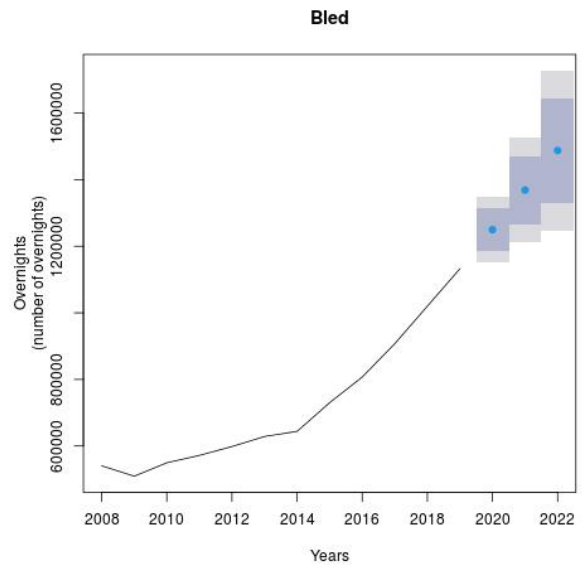


Figure A.18: Overnights forecast (Bled)



Source: Consortium 2020

Source: Consortium 2020

A forecast for tourism intensity provides an indicator for the development of tourism pressure and needs to be considered for meeting the need of balancing tourism inflow and residents' satisfaction. For Bled tourism intensity is predicted to increase within the next three years (see Figure A.19). Arrivals forecasts did not reveal an increase (Figure A.17) but the number of tourists per resident does (Figure A.19). Hence, the relative increase (percentage increase) of arrivals is stronger than the one of population.

Figure A.19: Tourism intensity forecast (Bled)

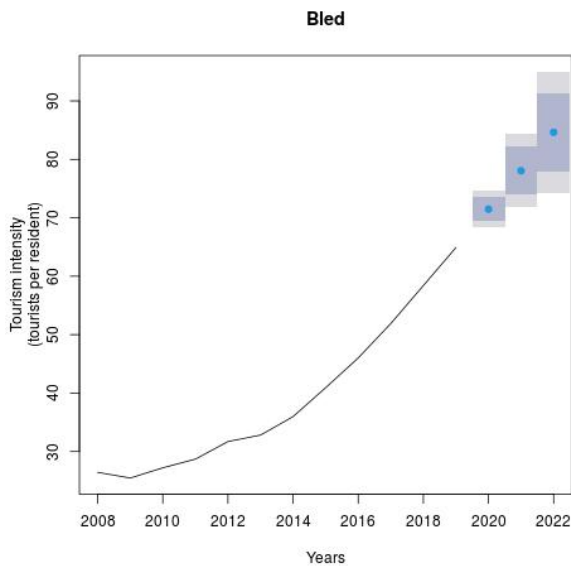
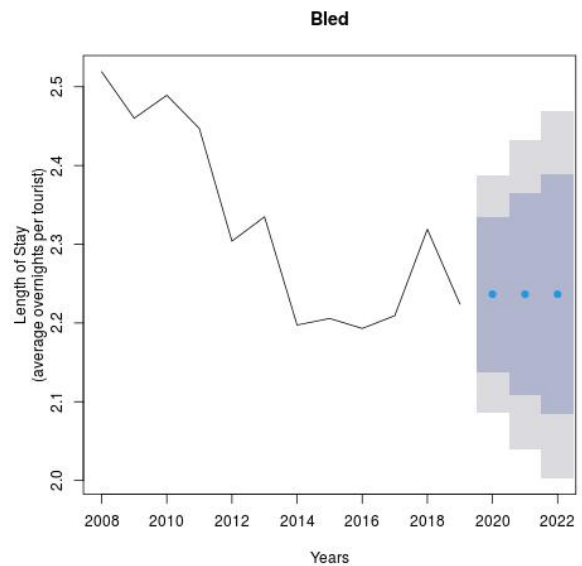


Figure A.20: Length of stay forecast (Bled)



Source: Consortium 2020

Source: Consortium 2020

Another interesting indicator is length of stay and its prediction for the next three years which shows for Bled a rather constant development with a slight decrease between 2008 and 2019 (see Figure A.20).

I.4 Step 4

I.4.1 Combining tourism and territorial context indicators into tourism impact (carrying capacity)

Based on desk research five key needs for Bled have been identified (see step 1), which were later assessed and confirmed through interviews by four stakeholders: the Director of the DMO Tourism Bled Organisation, the Director of Municipal Administration in the Municipality of Bled, the Green team coordinator at the DMO Tourism Bled Organisation, and the Coordinator of the Julian Alp Association and director at DMO Tourism Bohinj. Concerning possible pairs of tourism performance and territorial context indicators to be analyzed jointly, the following suggestions can be made to assess the needs:

- 1. The need for a dedicated and coordinated sustainability planning and stricter environmental measures:** Stakeholders identified the highest priority for water quality of Lake Bled. The dashboard does not include water quality data, but there is ARSO data available for Lake Bled – the data shows a “good” condition of the water quality over time. This lake specific data cannot be analyzed directly with the data in the dashboard which is municipality based. However, the dashboard includes data for municipal waste (kg/capita) which will be selected for the combined tourism performance and territorial context analysis. The following pairs will be jointly analyzed for the identified coordinated sustainability planning need: Arrivals (growth) AND/OR overnights (growth) AND/OR length of stay AGAINST green certificate AND/OR waste
- 2. The need to find a balance between tourist inflow and satisfaction of residents:** Bled experienced fast tourism growth within the last two to three years which led to a challenge in developing the accommodation sector accordingly. Overall stakeholders identified a need to further develop the whole tourism infrastructure to manage the growing tourism demand. The following pairs will be jointly analyzed for the identified coordinated sustainability planning need: (1) in terms of tourism infrastructure: length of stay AND/OR overnights AGAINST bedspace intensity; arrivals AGAINST bedspace; (2) in terms of residents’ satisfaction: tourism intensity AGAINST income AND/OR enterprises AND/OR ageing index AND/OR employment and arrivals AGAINST population
- 3. The need for carrying capacity measures in the destination as a whole, and especially in some of the destination’s hotspots:** In order to see destination hotspots and how this influences the destination as a whole Instagram and POI data will be visualized. But there are no statistical indicators in the dashboard.
- 4. The need to accelerate key infrastructure projects in the field of mobility:** There are no statistical indicators in the dashboard.
- 5. The need for strengthening cooperation in the region of Julian Alps:** In order to see how Bled and the neighboring municipalities in Gorenjska region developed over time,

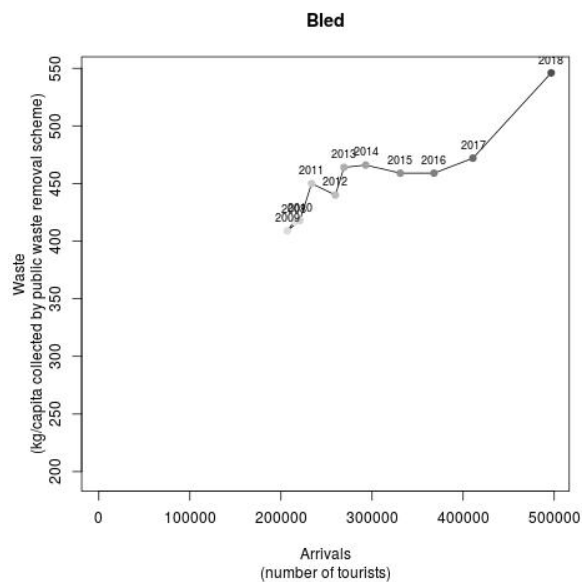
comparisons with neighboring municipalities like Bohinj, Gorje, etc. and other municipalities in the closer surrounding like Kranjska Gora are presented below.

All suggested indicator pairs can be downloaded from the dashboard for each year that is available for the destination (see Table A.9). The indicator pairs are visualized for the available time series and offer a detailed insight about the development of both indicators.

Need for a dedicated and coordinated sustainability planning and stricter environmental measures

Stakeholders identified water quality monitoring as the most important environmental measure, however the Dashboard does not include water quality data which is available for lakes and rivers. The Dashboard includes data at the municipal level and visualizations are only useful for this territorial unit for comparison purposes.

Figure A.21: Waste against arrivals 2008-2018



Source: Consortium 2020

A second-best analysis of environmental measures is related to municipal waste collected by the public waste removal scheme (kg/capita). Bled collected 417kg/capita in 2008 and 546 kg/capita in 2018 which is a moderate increase within ten years. Given the sharp increase of arrivals from 214,558 in 2008 to 509,247 in 2018 in combination with a decrease in the population of Bled during the same timespan (2008: 8,118; 2018: 7,835) it seems that waste could become an environmental problem in the future.

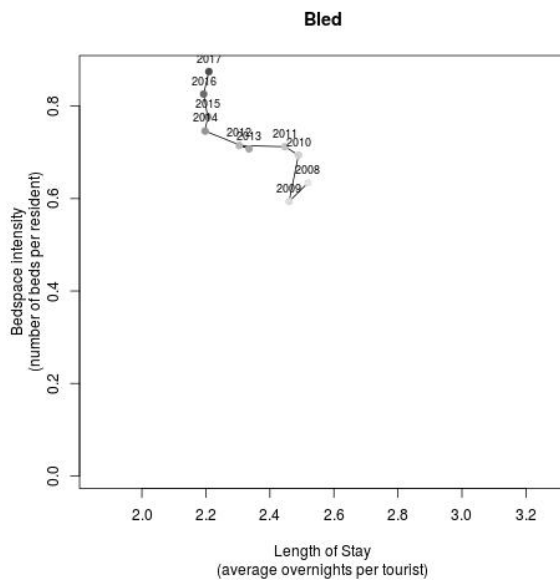
Need to find a balance between tourist inflow and satisfaction of residents

(1) In terms of tourism infrastructure

The balance between tourist inflow and satisfaction of residents can be depicted by the indicator pair length of stay (average overnights of tourists) and bedspace intensity (number of beds per resident) which shows for Bled that the decrease of overnights per tourist impacts the tourism

infrastructure negatively, since more beds per residents are needed (see Figure A.22). The decrease in population boosts this burden (beds vs. residents) even more.

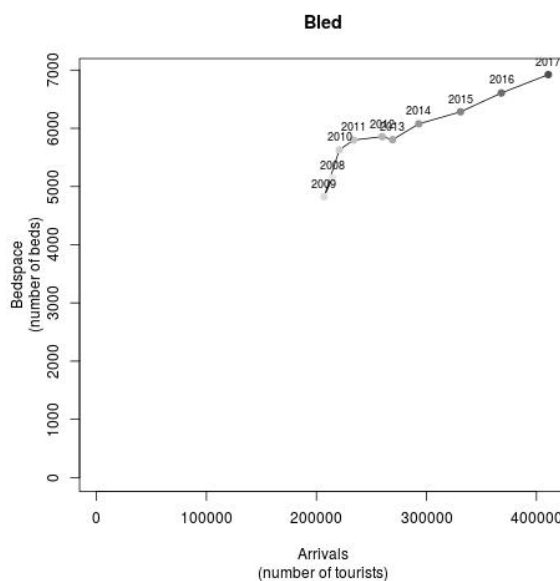
Figure A.22: Bedspace intensity against length of stay 2008-2017



Source: Consortium 2020

Another indicator pair is arrivals against bedspace (number of beds) which shows an increasing pressure on the tourism infrastructure due to steep increases of tourists in Bled. In conjunction with the indicator pair visualized in Figure A.22 it becomes clear that Bled reacted on the explosive increase of arrivals with additional bedspace capacity (2008: 5149 number of beds; 2017: 6923 number of beds) which is for a relatively small municipality (72 km²) quite a lot (see Figure A.23).

Figure A.23: Arrivals against bedspace 2008-2017

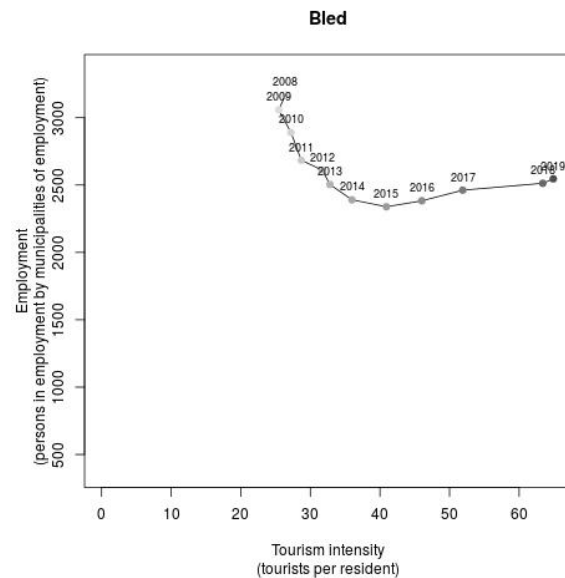


Source: Consortium 2020

(2) In terms of residents' satisfaction

The need to find a balance between tourist inflow and resident’s satisfaction can be depicted on the basis of a couple of socioeconomic indicators in comparison with tourism intensity (tourists per residents). Figure A.24 visualizes the development of tourism intensity over time in a direct comparison with the development of employment in Bled and shows that tourism intensity increases over time while employment decreases. It seems that more arrivals do not necessarily open windows of opportunity for new jobs.

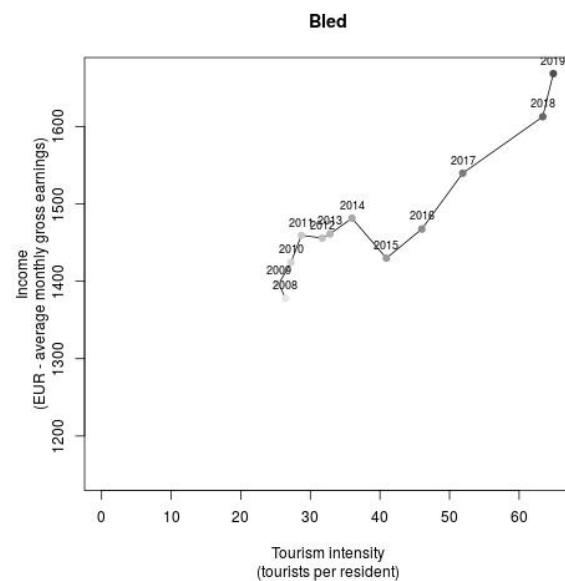
Figure A.24: Tourism intensity against employment 2008-2019



Source: Consortium 2020

Another indicator pair is tourism intensity against income (average monthly gross earnings in Euro) visualized in Figure A.25. It shows that income and tourism intensity steadily increased over time which can be interpreted positively.

Figure A.25: Tourism intensity against income 2008-2019

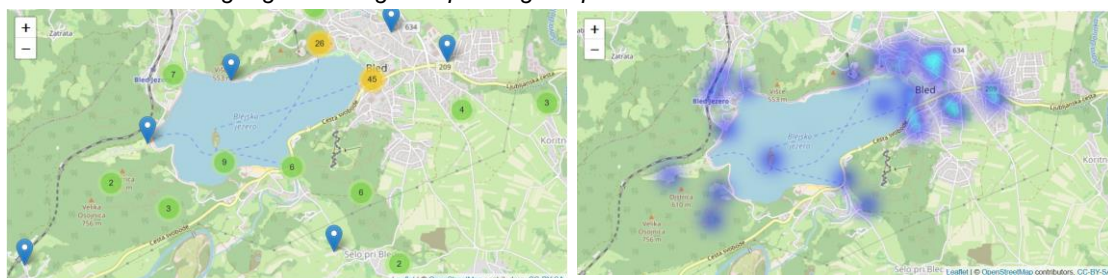


Source: Consortium 2020

The need for carrying capacity measures in the destination as a whole, and especially in some of the destination’s hotspots

Bled as a destination is definitely well known for Lake Bled. Almost every tourist likes to see the lake and wants to drive along the lake, however this leads to overcrowding along the lakeside especially because of the car and bus traffic. The closest area around the lake experiences a lot more pressure compared with the farther surrounding. The visualizations in Figure A.26 go hand in hand with each other. From the number of POIs representing the touristic offers on sight (plot on the left side) as well as from the number of posts representing the tourists’ interests (plot on the right side) affected areas are clearly visible.

Figure A.26: Hotspots – left map Touristic Open Street Map (OSM) Points-of-Interest (POIs) Locations in Bled and surrounding region and right map Instagram posts

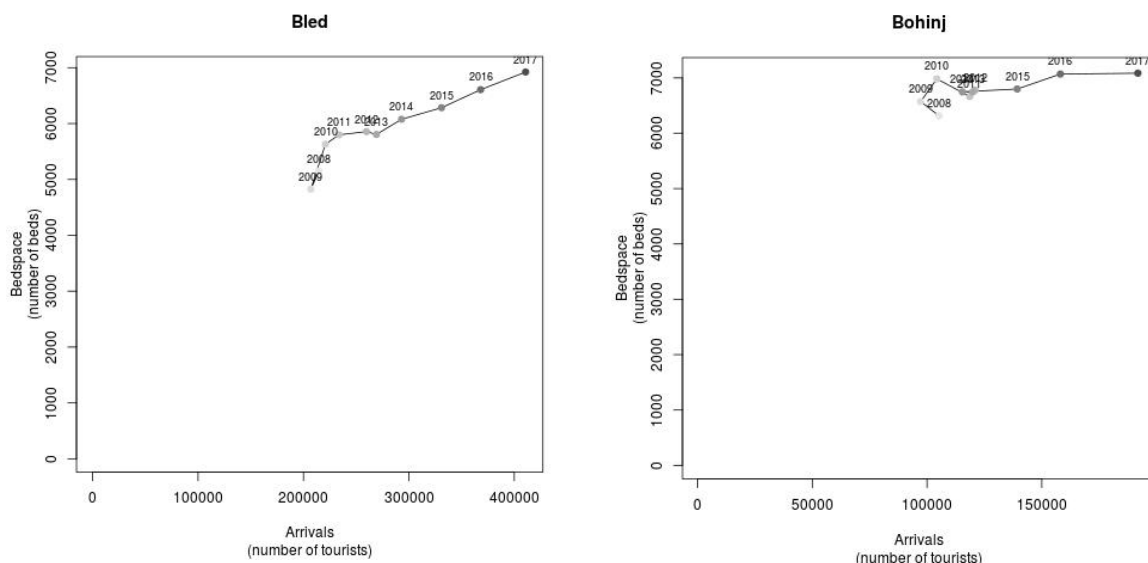


Source: Consortium 2020

Need for strengthening cooperation in the region of Julian Alps

Since the dashboard includes data at the municipal level (LAU2), single municipalities in the region Julian Alps need to be compared individually with each other to see how the different destinations perform.

Figure A.27: Arrivals against bedspaces – left graph Bled and right graph Bohinj 2008-2017



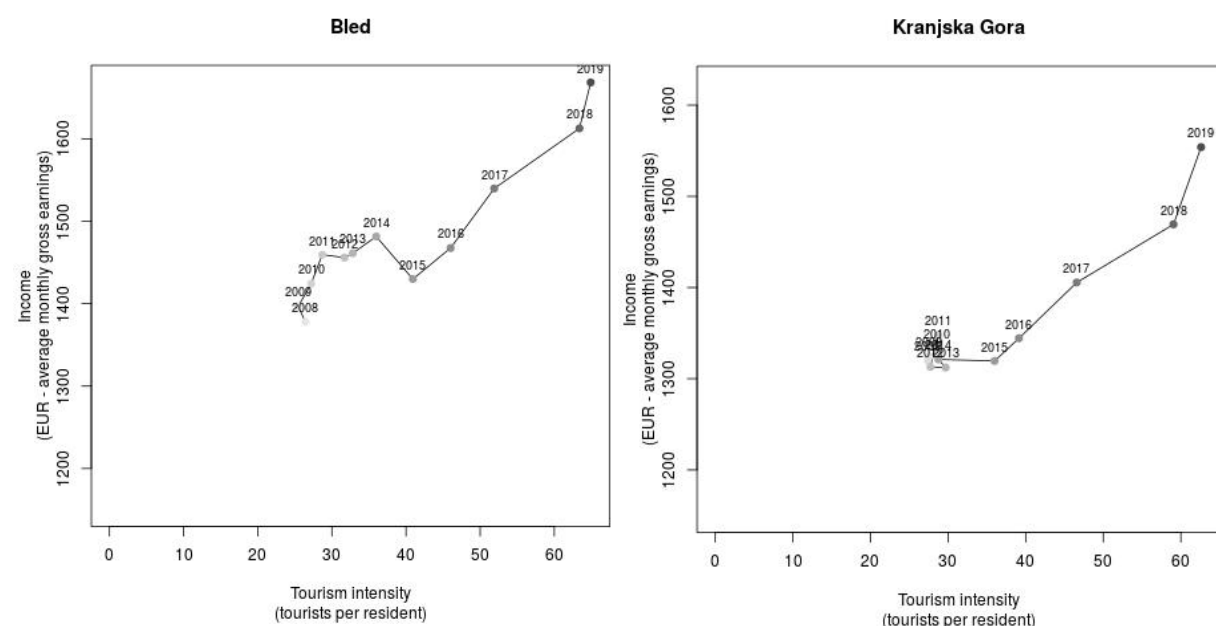
Source: Consortium 2020

The direct comparison between Bled and Bohinj for the indicator pair arrivals against bedspace (see Figure A.27) shows that Bohinj (right graph) and Bled (left graph) offer almost the same

number of beds in 2017 (Bled: 6,923; Bohinj: 7,085). But Bled started from a much lower bed-space infrastructure in 2008 (Bled: 5,149; Bohinj: 6,314). Both destinations experienced increases in arrivals however Bled (plus 410,731-214,588=196,143 arrivals 2008-2017) to a much bigger extent than Bohinj (plus 191,873-105,242=86,631 arrivals 2008-2017).

Another indicator pair for comparing the performance of destinations in the region Julian Alps is tourism intensity against income. Both destinations are characterized by high pressure of tourism and both experienced increases over time. Bled shows a higher income level than Kranjska Gora but both destinations are characterized by a steady increase of income especially 2015-2019. The region seems to follow a similar socioeconomic trend over time however Bled is characterized by a more dynamic development than other destinations in the region.

Figure A.28: Tourism intensity against income 2008-2019



Source: Consortium 2020

1.4.2 Interpreting tourism impact with benchmarking

In order to perform benchmarking, the different pairs of tourism performance and territorial context indicators need to be compared to the values from other Slovenian municipalities. In the following, the latest year for which data were available is analysed. Each blue dot in those density graphs represents the combination of the two selected indicators of all municipalities available in the database for the displayed year. The big black dot represents the selected municipality. Red areas highlight dense areas of municipalities, yellow ones are sparsely populated. A municipality located within/outside the red area is similar/different compared to all other to municipalities.

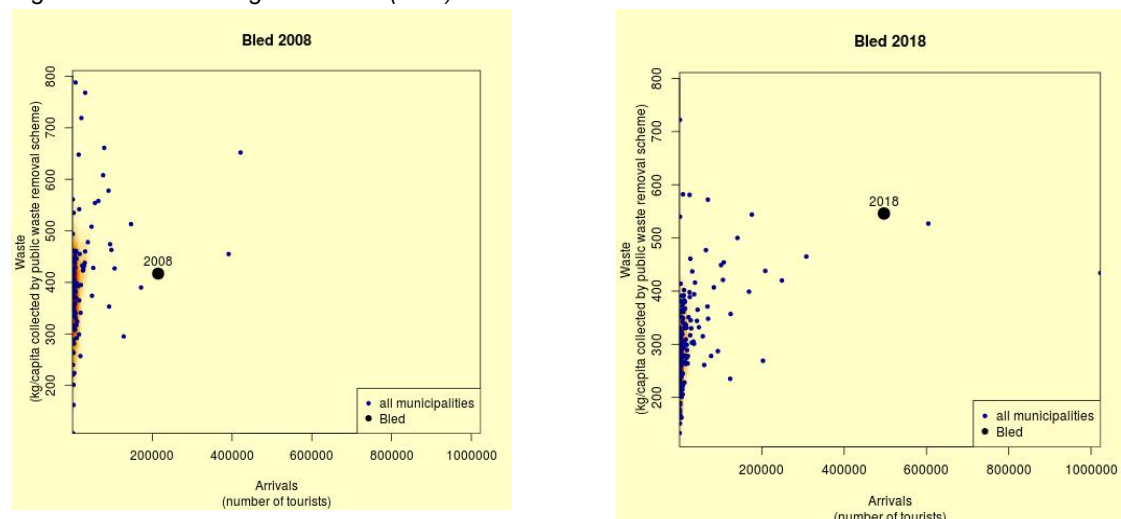
Additional insights into tourism impact can be gained by using the “quartile benchmark” option. If this option is selected, the 25%, 50%, and 75% quartiles are determined (out of all municipalities for which data is available for the respective year) and these values are displayed over the years. The darker the grey coloration of the percentage value, the more current its observation.

Quartiles are determined by ranking all municipalities according to the selected indicator and determining the threshold that separates the 25% of those municipalities scoring lowest on the selected indicator from the rest, the 50% threshold that cuts the ranked indicator in the middle and in this way splits all municipalities half-half (the so-called median), and the 75% threshold separating the highest scoring 25% from the rest.

Need for a dedicated and coordinated sustainability planning and stricter environmental measures

Figure A.29 visualizes an indicator pair which illustrates the arrivals in comparison to the waste in kg per capita collected in the respective year. In terms of the collected waste Bled collected 417kg/capita in 2008 which corresponds with the Slovenian average between the maximum and the minimum as can be seen in the left graph (Figure A.29). The Slovenian average over all Slovenian municipalities' average values in 2008 over all municipalities was 344kg/capita. The amount of collected waste (546 kg/capita) in 2018 benchmarked with all Slovenian municipalities' average values in 2018 of 302 kg/capita which might be an effect of the sharp increase of arrivals from 214,558 arrivals in 2008 to 509,247 in 2018. In terms of a dedicated and coordinated sustainability planning Bled should analyze further how waste originated from tourism can be reduced effectively to avoid pressure on Bled's carrying capacity. This includes a detailed analysis of the waste composition and the precise origin.

Figure A.29: Arrivals against waste (Bled)



Source: Consortium 2020

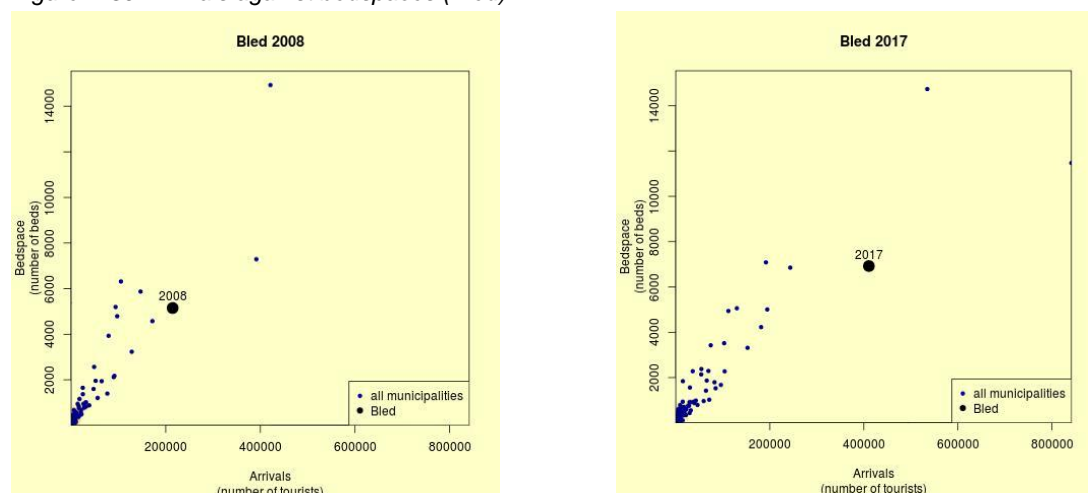
Need to find a balance between tourist inflow and satisfaction of residents

(1) In terms of tourism infrastructure

Figure A.30 demonstrates that Bled is compared to all other municipalities exceptional in terms of the selected indicator pair bedspaces against arrivals and developed from 2008 until 2017 to one of the three most important tourism destinations in Slovenia. Only Ljubljana (2017: 841,320 arrivals) and Piran/Pirano (2017: 534,874 arrivals) registered more arrivals than Bled

(2017: 410,731 arrivals). Kranjska Gora ranked 5 falls far below the top three (2017: 243,415 arrivals). However, Ljubljana (ranked 2nd behind Piran) invested more in their bedspace infrastructure than Bled (ranked 4th behind Bohinj) (Ljubljana 2008: 7,290 and 2017: 11,469; Bled 2008: 5,149 and 2017: 6,923). Ljubljana showed an increase of 57.3% between 2008 and 2017, Bled scored 34.5%. In terms of Bled's carrying capacity it seems that the dynamic tourism development needs a more intense dedication of tourism infrastructure development.

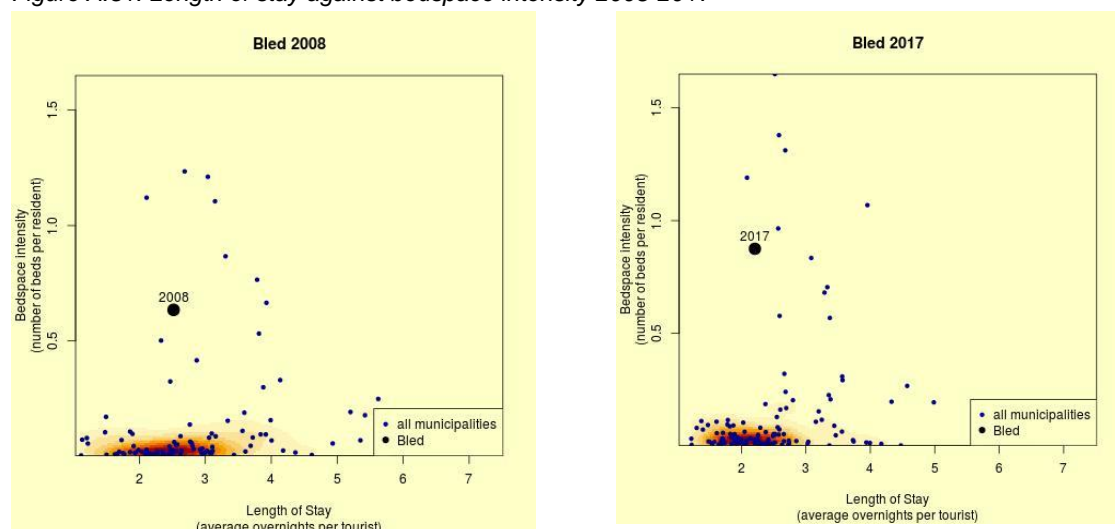
Figure A.30: Arrivals against bedspaces (Bled)



Source: Consortium 2020

Figure A.31 benchmarks Bled against all other municipalities and shows clearly that Bled is characterized by an increasing bedspace intensity and a decreasing length of stay. In terms of this indicator pair Bled shows compared to all other municipalities a different characteristic and seems to be more exposed to tourism than most of Slovenian municipalities.

Figure A.31: Length of stay against bedspace intensity 2008-2017

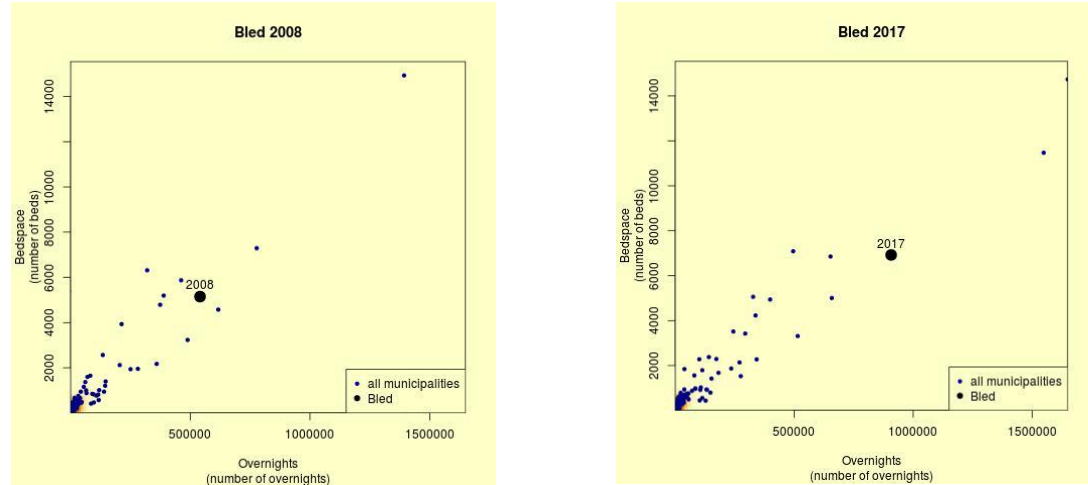


Source: Consortium 2020

Figure A.32 illustrates overnights against bedspace for the years 2008 and 2017 and demonstrates a striking increase of overnights (2008: 540,480; 2017: 907,419; 2019: 1,132,574) with a moderate increase of bedspace in Bled which can be clearly interpreted as an existing

pressure on Bled's carrying capacity. Bled belongs next to Piran/Pirano and Ljubljana to the three most dynamic destinations in Slovenia and needs to carefully monitor its tourism infrastructure development not to exceed their carrying capacity.

Figure A.32: Overnights against bespace (Bled)

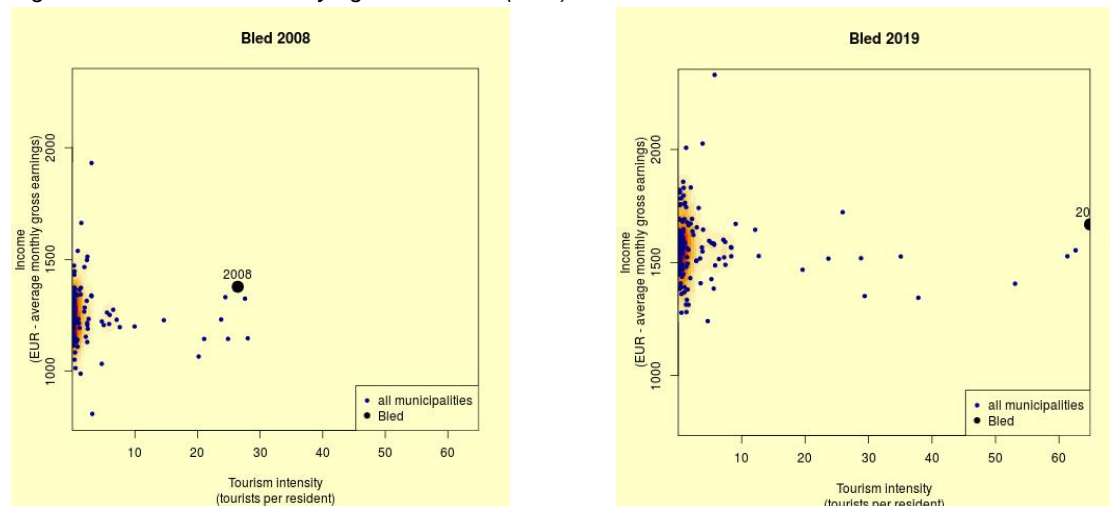


Source: Consortium 2020

(2) In terms of residents' satisfaction

Figure A.33 visualizes an indicator pair which might provide a deeper insight into the dynamic tourism development and its pressure on Bled's population – income against tourism intensity. As can be seen in both graphs, the one for 2008 and the other for 2019, Bled ranges within the Slovenian average in terms of income but is affected by a high and extraordinary pressure or tourism in both years. The dynamic tourism development obviously does not correspond with a direct income effect which might lead to a negative carrying capacity effect.

Figure A.33: Tourism intensity against income (Bled)

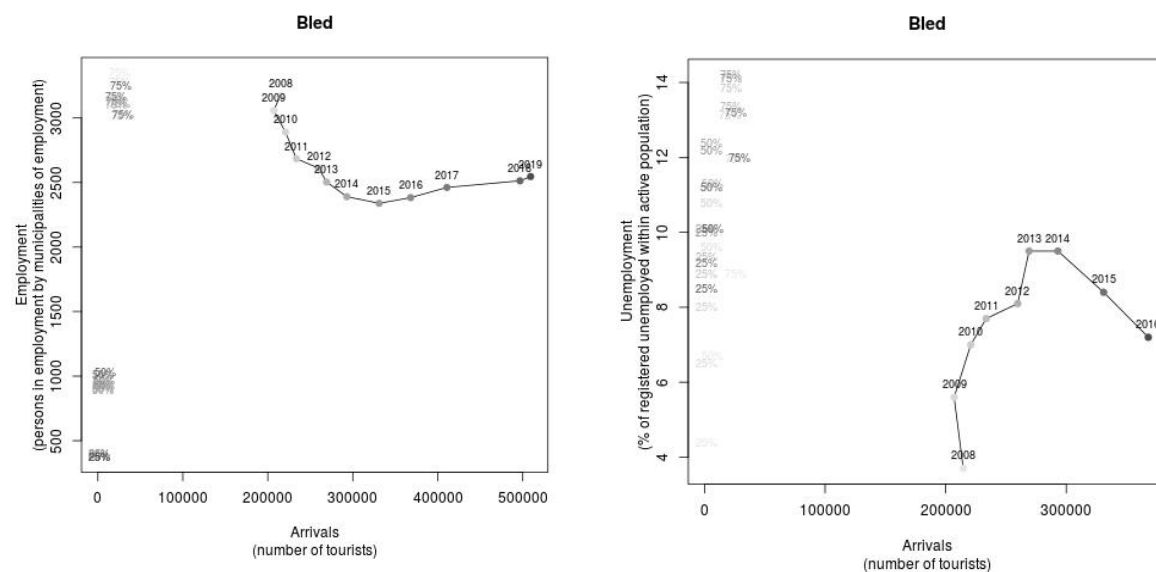


Source: Consortium 2020

Figure A.34 visualizes employment and unemployment over time for Bled in comparison to all other municipalities and shows that Bled lost employment opportunities compared to all other municipalities (see left graph). The top ranked 25% of Slovenian municipalities did not move

dramatically between 2008 and 2019, as can be seen from the 75% quartile just slightly moving downwards. Bled shows a more dramatic decrease between 2008 and 2015 but seems to recover since then. Unemployment seems to be relatively low compared to all other municipalities as it is positioned below the 25% quartile that indicates the threshold between the lowest scoring Slovenian municipalities and the rest. But it shows an increasing trend between 2008 and 2013 after the economic crisis (see right graph) and corresponds also with the employment reduction.

Figure A.34: Arrivals against employment (left graph) and unemployment (right graph)

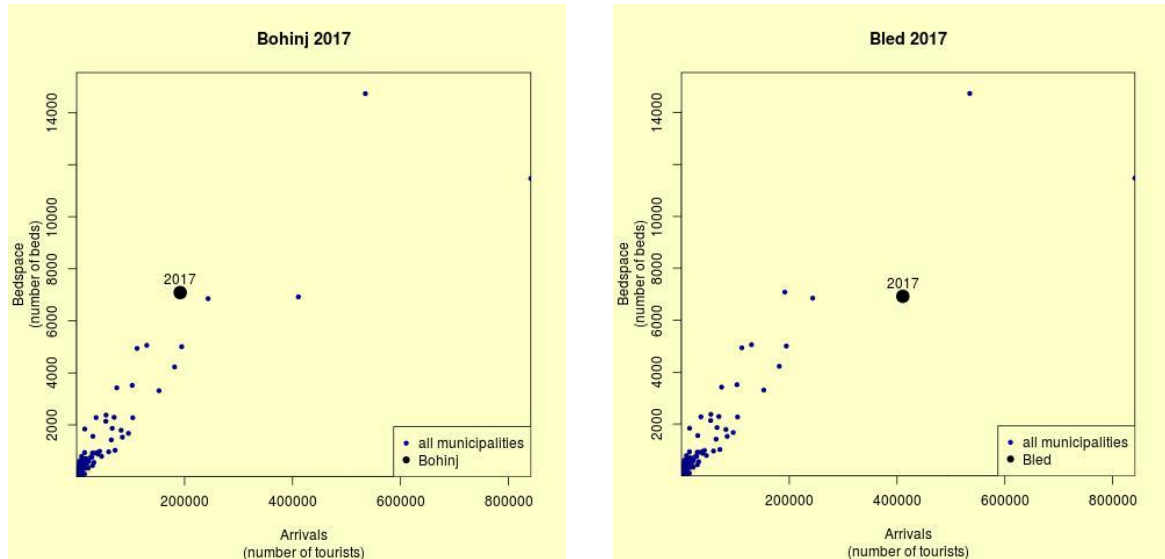


Source: Consortium 2020

Need for strengthening cooperation in the region of Julian Alps

The benchmarking visualizations for 2017 (see Figure A.35) show a similar picture for the two destinations Bled and Bohinj in terms of bedspace infrastructure. Both destinations offer more beds than most of the Slovenian municipalities (only Ljubljana and Piran/Pirano show more bedspaces). In conjunction with the number of arrivals and the extreme growth of arrivals over time, Bled seems to be extremely exposed to tourism infrastructure challenges. More cooperation with the surrounding destination would offer options for balancing out the growing number of tourists.

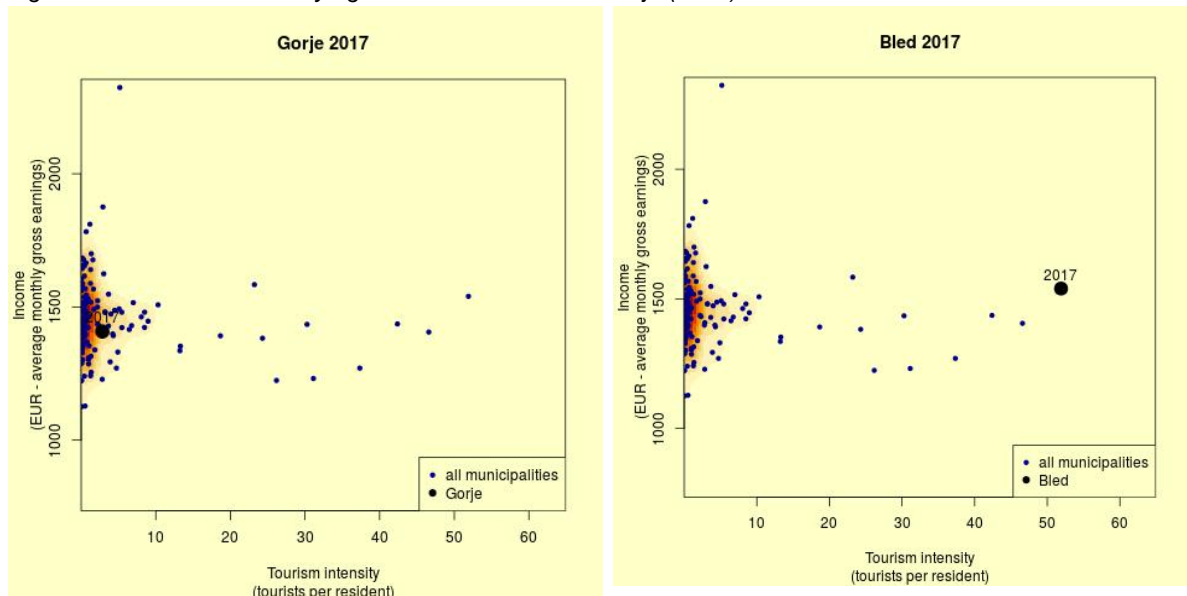
Figure A.35: Arrivals against bedspace comparison between Bohinj and Bled (2017)



Source: Consortium 2020

When it comes to direct pressure of tourism on residents, destinations in the region Julian Alps seem to face similar problems with one exception the destination Gorje. Figure A.36 visualizes the indicator pair tourism intensity and income and it becomes clear that Bled (right graph) is much more exposed to the pressure than Gorje (left graph). Gorje shows a similar income level than Bled but much less pressure (tourism intensity). The three blue dots next to Bled are Kranjska Gora, Bovec and Bohinj with 46.6, 42.4 and 37.34 arrivals per resident. These are all destinations within the Julian Alps and all of them equally exposed to tourism pressure as Bled, with 51.9 arrivals per resident,. Given this evidence it would be good to further strengthening cooperation in the region as foreseen in the need.

Figure A.36: Tourism intensity against income Bled and Gorje (2017)



Source: Consortium 2020

I.5 Step 5

I.5.1 Carrying Capacity Workshop

Table A.10: Overview of workshop participants

Interviewee name	Institution/organisation	Position
Špela Remec-Rekar	ARSO	Water quality expert
Janez Fajfar	Municipality Bled	Mayor
Anja Kolbl	TD Gorje	Representative of the Tourist Association Gorje (the manager of Vintgar Gorge)
Srečko Kunčič	NGO Spoštujmo Bled	President
Marija Ferjan	Občina Bled	Investments department – senior consultant
Blaž Pretnar	Sava-Turizem D.D.	General Manager Assistant
Saša Kek	SOS – Slovenian Municipalities Association	Head of Tourism
Kir Kuščer	SEBLU	Assistant professor
Tanja Mihalič	SEBLU	Professor Researcher
Misa Novak	Alohas	Director
Tomaž Rogelj	Turizem Bled	Director
<i>Romana Purkart</i>	Turizem Bled	PR manager and Green coordinator
Špela Hartman	Sava Turizem	Head of Animation
Eva Štraus Podlogar	RAGOR Development Agency for Upper Gorenjska	Director of RAGOR Development agency
Robert Klinar	Občina Bled	Director of the Municipality Bled
Sabine Sedlacek	Modul University Vienna	Vice-President
Christian Weismayer	Modul University Vienna	Assistant Professor
Bernd Schuh	ÖIR GmbH	Managing Director
Lyndon Nixon	Modul University Vienna	Assistant Professor

Source: Consortium, 2020

I.6 Outcomes of the Carrying Capacity Workshop

Discussion of the case study specific results

The systemic picture was presented to the participants and those who attended the first workshop agreed that COVID-19 has not essentially changed the picture of the growing trend of Bled's tourism. There was the general notion that Bled will still be perceived as leader in Slovenian tourism. However, there was a common notion that the structure of tourism will change due to the external shock after COVID-19 but the elements in the systemic picture will stay the same. Some consequences will be that the public household income may fall. In addition, stakeholders were concerned that infrastructure investments both from national and EU sources may be lacking which might impact for example the development of transportation capabilities.

After the selection of indicators was presented and stakeholders have been made aware that not all indicators from their wish list are included in the dashboard, the results for Bled were presented. Stakeholders would like to see lake water quality data in the dashboard. The problem that a lake water quality indicator cannot be compared with statistical indicators at the municipal level was clarified.

The presentation focused on the five needs however only four indicator needs were covered in the dashboard. The overview of indicator combinations was perceived as helpful but it became clear that the destination started already a regional development process where all destinations in the region Julian Alps are involved. Major parts of the discussion focused on the whole region and not solely on the destination Bled.

Discussion about the implications of results

Forum 1: Setting the frame (poster session/mindmapping)

Forum 1 aimed at setting the frame and was structured along the needs. Overall, three needs were addressed and the stakeholders were invited to bring in their experiences with the existing activities.

- **Need for dedicated and coordinated sustainability planning and stricter environmental measures**

The discussion started from the presented indicator pairs and the stakeholders informed the experts about the “Zero Waste” activities which started with a visit of the Zero Waste Europe Cities team in 2019. According to the NGO “Zero Waste Europe” Bled committed to Zero Waste by implementing waste management and waste prevention measures. Therefore, all stakeholders agreed that waste is not a pressing challenge and the municipality has already lots of activities to tackle any existing waste challenge. However, stakeholders also identified the challenge of daily tourist flows since waste finds its way into the water (→ the chemical substance status shows a negative impact of the growing tourist numbers). The discussion addressed a lack of regional planning which causes problems mainly in the areas of mobility, camping outside the community borders of Bled, and regional risk plans.

The lake water quality was addressed mainly by the experts from ARSO and the Mayor who both argued that there is existing knowledge about pressure on littoral zones (fisheries, tourism) evident since 2016 which led to swimming zone restrictions.

- **Need to find a balance between tourist inflow and satisfaction of residents**

The discussion started with the perception of a visible change of tourist behaviour due to COVID-19 – tourists now stay longer in the destination (increase of length of stay) which is interpreted as a positive change where hotels and the municipality would benefit. Challenges related to the traffic infrastructure were pinpointed but the Mayor argued that a parking guide is in place. However, there was a general notion that parking seems to be one of the major problems in Bled.

Another discussion point was related to tourism hotspots which leads to a very specific behavior of residents who are trying to avoid the hotspots not to be affected by the perceived overcrowding. Related to that the aspect of seasonality was addressed and the Mayor argued that there are five to six weekends around the year which are perceived as being problematic. The main overcrowding is caused by international tourist flows which are currently interrupted due to COVID-19. This discussion led directly to a desired image change where Bled would develop

to an exclusive destination where tourists would come for certain experiences to Bled. Stakeholders also mentioned that there is a need to initiate a dialogue between residents and tourists which should help to create more respect.

- **Need for carrying capacity measures in the destination as a whole, and especially in some of the destination's hotspots**

The starting point of this discussion was tied to the argument of defining location specific experiences addressed under need two and headed towards a more strategic bundling of experiences and activities that seem to be more oriented towards future activities and not so much based on existing activities. But stakeholders also provided insights into existing activities which are listed below:

- Sports activities (climbing, cycling)
- Nature experience
- Disentangling flows → magic forest (one way path)
- Handicrafts → local souvenirs (e.g. jewellery line honey etc.)
- Local handicraft experience: needs to be developed, cooperation

Other existing activities were added under the already started regional development process Julian Alps where the Julian trail was identified as a common product.

A more general topic, the one of spatial planning restrictions, came into discussion and stakeholders discussed the strict state permits affecting local measures which need to meet national law.

At the end of the discussion the focus shifted more towards Bled centre where stakeholders identified activities targeting at increasing the attractiveness of the centre to accommodate different tourist needs.

Forum 2: Discussion of potential actions per destination

In forum 2 stakeholders were asked to go back to each discussed need and to commonly identify what can be done to initiate change and to help the destination to meet the needs.

- **Need for dedicated and coordinated sustainability planning and stricter environmental measures**

In terms of waste, stakeholders agreed that the initiated steps towards a zero waste municipality are the right steps to reach the goal for stricter environmental measures. However, information and education for tourists can always be improved. Stakeholders handed over a newly developed leaflet for tourists which focuses on both waste and water aiming at awareness raising (Figure A.37).

Figure A.37: Slovenia Green Destination leaflet for Bled



Source: Slovenia Green Destination

Future activities could include zero plastic tourism initiatives for the Julian Alps.

For tackling the water quality problem stakeholders agreed that tourists and locals need to be addressed equally and the future could lead to more experience-based initiatives to make the lake more attractive. The discussion stressed the problem of different competences where water falls under national competence but the banks fall under municipal competence which makes it relatively hard to come up with strict measures for the whole lake area. This led to a general public good debate where restrictions are needed but controlling the measures is a problem.

- **Need to find a balance between tourist inflow and satisfaction of residents**

The general tenor was that COVID-19 as an external shock can be used to change the structure of tourism however stakeholders would need to bundle their interests. The summer season 2020 offered insights into different tourist segments, i.e. more individual tourists and more domestic tourists who are willing to stay longer in the destination. There was a general agreement that this should be further developed and the destination should offer more specific products and packages supporting these types of tourists.

Future activities for improving the traffic infrastructure were discussed under the Alpine Pearl initiatives targeting at soft mobility. Bled is dedicated to these measures and sees here a lot of projects that would need to be initiated. The discussion also stressed the problem of land ownership which prevents a more efficient parking space management.

Related to hotspots more information material about other sites, ideas for a hop on/hop off bus and better managed timeslots were discussed. For Vintgar Gorge a specific channelling process was mentioned.

Activities for tackling the seasonality problem were discussed around options for sports activities in winter which could bring other tourist segments to Bled. In parallel, an improvement of infrastructure would be needed to attract other types of tourists.

- **Need for carrying capacity measures in the destination as a whole, and especially in some of the destination's hotspots**

The discussion focused more on ideas for experience tourism and stakeholders have been asked how they define experience and how this experience approach can be used for strengthening the destination's carrying capacity. Here are some examples:

- Swimming in the sunset, dinner at the sunset terrace (only if not crowded)
- More than you would expect(!)
- Individual experience/perception(!)
- How to make promoted experiences more visible? → website covers all
- How to bring tourists back after the 1st visit? → 2nd time activities

Table A.11 provides an overview of the discussion in Forum 1 (left column) and Forum 2 (right column).

Table A.11: Overview of the discussion in Forum 1 and 2

(1) Need for dedicated and coordinated sustainability planning and stricter environmental measures	
Waste	What can be done?
<p>The challenge of daily tourist flows is closely related to environmental issues, e.g. waste deposit into the water has implications on the chemical substance status of the lake. With increasing tourist numbers this becomes a problem.</p> <p>There is a lack of regional planning which impacts the environment negatively, e.g. mobility, camping outside Bled, regional risk plans</p>	<p>Bled should become a zero waste municipality</p> <p>More information and education on e.g. waste separation</p> <p>There are not enough single baskets available so with the increase a better distribution this might help to tackle tourism related waste problems.</p> <p>The region Julian Alps focuses on zero plastic tourism.</p>
<p>Water quality of lake Bled: 2016 pressure on littoral zones (fisheries, tourism) This led to swimming zone restrictions which are needed in order to tackle the problem.</p>	<p>Both stakeholder groups tourists and locals need to be addressed.</p> <p>Voluntary steps are initiated but need to be coerced.</p> <p>Introduction of experience based measures (make it more attractively)</p> <p>Via green scheme an educational info folder which leads to awareness raising will help to inform and educate all stakeholder groups.</p>
(2) Need to find a balance between tourist inflow and satisfaction of residents	
<p>One perceived COVID-19 effect is the increase of length of stay.</p> <p>There are lots of activities needed in order to build up a modern and up-to-date traffic infrastructure but there is already a parking guide in place</p> <p>Specific hotel infrastructure is perceived to be "old" and not up-to-date, e.g. indoor parking lot, number of parking lots, age of hotels (younger, 40 years old)</p>	<p>This is seen as a chance to change the structure of tourism which would need to be initiated.</p> <p>Traffic infrastructure could be combined with Alpine Peaks initiatives which is tackling soft mobility.</p> <p>Establish a parking space management (land ownership problem)</p> <p>Hotel infrastructure: initiatives for locals & tourist</p>

Tourism hot spots are avoided by locals.	Provision about information of other sites or offering a hop on/hop off bus. Vintgar Gorge is one of the hotspots where channelling access could help.
Seasonality is only a problem during five to six weekends around the year. International tourist flows due to promotion which is not induced locally. This is a challenge. There is a need for an image change in order to promote Bled as an exclusive destination. 'Experience the destination' need which implies launch a dialogue between residents and tourists in order to develop mutual respect.	Organisation of sports activities in winter Improvement of infrastructure would help to attract other types of tourists.
(3) Need for carrying capacity measures in the destination as a whole, and especially in some of the destination's hotspots	
Bundling experiences/activities	
Sports activities (climbing, cycling) Nature experience activities help to disentangle flows, e.g. the magic forest (one way path) offer Need to promote handicrafts for producing local souvenirs (e.g. jewellery line, honey etc.)	Next steps: bring tourists there → showcase local handicraft experience: needs to be developed, cooperation
The regional development process Julian Alps promotes the Julian trail including infrastructure plans, cross-sectional cooperation There is a common communication strategy which makes the region to a must experience.	Develop regional brands Initiate intermunicipal cooperation → soft measures
Spatial planning restrictions (→ state permits local measures need to meet national law)	Need to focus on other spatial levels than the municipal level.
Need to increase attractiveness of Bled Center	Improve specific hotel infrastructure (to accommodate different tourist needs)
Discussion about experience – how to define, how can it be used: – positive vs. negative – swimming in the sunset, dinner at the sunset terrace (only if not crowded) – more than you would expect(!) – individual experience/perception(!) How to make promoted experiences more visible? → website covers all How to bring tourists back after the 1 st visit? → 2 nd time activities	

1.6.1 Formulation of policy recommendations

The policy recommendations are based step 1-5 in the methodology and have to be seen as the overarching product of the methodology.

The case study process for Bled can be concluded as a very intensive process where especially in step 1 and 2 stakeholders contributed actively. In the course of a new regional development process Bled is connected with all other destinations in the Julian Alps. This process forces the destination to develop strategies in cooperation with destinations showing similar pressures and being exposed to similar challenges.

The analysis in step 3 and 4 confirmed quite a lot of concerns having been raised in step 1 and 2 where the needs for the destination have been identified. Therefore, the data analysis offered

insights into already known challenges but also identified insights into the broader territorial context which has not been considered for the narrower tourism strategy. Visualizations helped stakeholders in the stakeholder workshop to understand how important monitoring of certain indicators is and how territorial context indicators need to be considered for tourism development.

The main conclusion for the destination Bled is that its carrying capacity already reached the area of tourism infrastructure since arrivals steeply increased within the last couple of years while overnights decreased. Overall, this led to a situation where more tourists stay for a shorter period of time in the destination. In turn this has consequences on the bedspace capacity if crowding effects are mainly experienced during the weekend as pointed out in the workshop. This leads to the following policy recommendation:

Defining specific experience packages especially for tourists coming during the week. This opens windows of opportunities within the greater region Julian Alps where “cooperation” was identified as a pressing need.

Another conclusion from the workshop discussions is that Bled sees the external shock of COVID-19 as a possible chance to re-structure tourism. The destination seems to suffer from bus tourism which impacts the whole traffic infrastructure and here the carrying capacity seemed to be reached before COVID-19. The “new” situation shows that tourists stay longer in the destination, enjoy the city centre and demand new services. This leads to the following policy recommendation:

Providing specific services for tourists who want to experience Bled aside the hotspots. This includes specific infrastructure which invites tourists to linger at spots which allow for example a relaxing view to the lake.

If one of the needs focuses on balancing tourist inflows and residents satisfaction then one conclusion must be to start a citizen participation process where residents are invited to bring in their concerns but in turn also think about solutions from their point of view. This leads to the following policy recommendation:

Initiating a broader stakeholder participation process where especially residents are invited to bring in new ideas and work together with the tourism industry and the municipality. This should be designed as a particular resident circle which should be ideally independent from already existing activities and processes like for example the Alpine Pearl activities.

II Case study Brežice

II.1 Step 1

II.1.1 Overall context

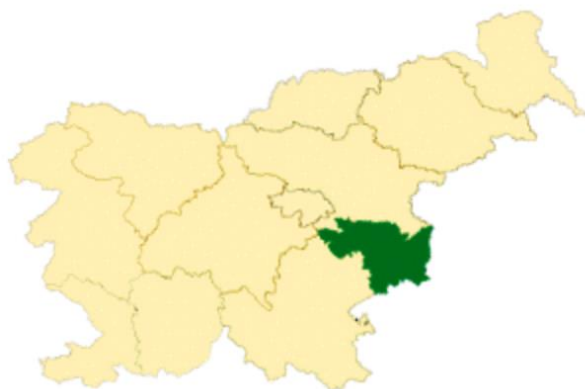
Destination definition

The destination of Brežice covers the area of the Municipality Brežice, the municipality is a part of Posavje Region (Figure A.38) and a part of Thermal Pannonian Slovenia Macro Destination (Figure A.39). The destination boundaries have been defined according to the interviews conducted. In 2019, the Municipality of Brežice and the Entrepreneurship, Tourism and Youth Organisation of Brežice (ETYO) presented a pilot project at the regional level to establish a regional office of destination management. The aim of this structure is to provide comprehensive planning, organisation, management, monitoring and evaluation of tourism development, and marketing in all municipalities of the Čatež and Posavje destinations – Bistrica ob Sotli, Brežice, Kostanjevica na Krki, Krško, Radeče and Sevnica. The project has not yet been completed to date and there are extensive planned activities by the Brežice office of destination management in the next two years. Since all the other municipalities did not participate, only the municipality of Brežice is taken into account.

Destination location

As mentioned, Municipality Brežice is a part of the Posavje Statistical region and it is located in eastern Slovenia, near the Croatian border. Posavje region (figure A.10) is a NUTS3 (SI036) Statistical region (Spodnje-posavska statistična regija: Krško, Brežice, Bistrica ob Sotli, Kostanjevica na Krki, Sevnica). The name of the Local Administrative Unit of the municipality is Brežice with LAU code of 009.

Figure A.38: Posavje Region



Source: GZS, 2020

The below figure presents the case study region in the relevant Slovenian touristic macro-destination (MGRT, 2017).

Figure A.39: Thermal Pannonian Slovenia Macro Destination



Source: MGRT, 2017

The area of municipality Brežice has changed. Parts of settlements Gregovce, Jesenice, Loče and Obrežje from municipality Brežice were eliminated from the national territory of the Republic of Slovenia and joined the national territory of the Republic of Croatia, while a part of settlement Loče was eliminated from the national territory of the Republic of Croatia and joined the national territory of the Republic of Slovenia (Eurostat, 2020). The municipality has an area of 26,806,4650 m² with a degree of urbanisation of 3⁴ within which 24,084 people live.

Socio-economic data for the municipality, region and Slovenia

As of 2018, about 24,000 people live in the municipality, which represent 11,63% of the national population. In general, the natural increase in the municipality (per 1,000 population) is negative. The municipality's ageing index for men and women is higher than the national average, and the mean age of the population in Brežice is slightly higher than Slovenia, which puts the municipality demographically at risk. In addition, the population density in the municipality is 90 people per km², which is lower compared to the national average of 102 people per km².

With regards to employment, Brežice has more than 1,900 enterprises with about 7,100 persons employed. Among the working age population of 15-64, 10% are registered as unemployed, which is 2% higher than the national average. In addition, the municipality is below the national average in terms of average monthly net earnings per person employed, by about EUR 100.

The educational structure of the population of the municipality and the region is rather good. The share of population in the region with basic education or less is lower than the national average, while the share of population with tertiary education is nearly the same as the national

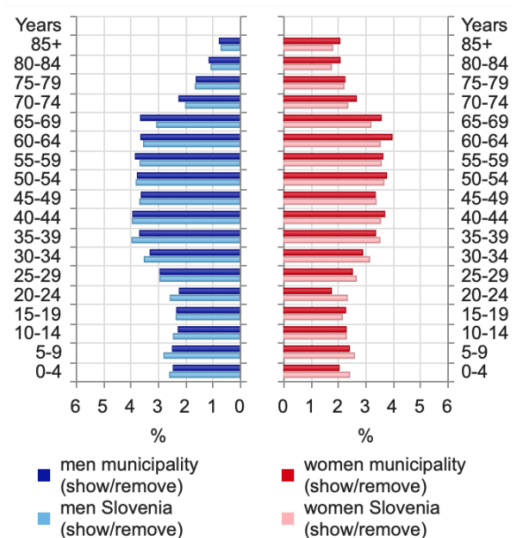
⁴ The Degree of Urbanisation consists of 3 categories:

- 1) Cities (Densely populated areas: at least 50% of the population lives in urban centres),
- 2) Towns and suburbs (Intermediate density areas: less than 50% of the population lives in rural grid cells and less than 50% of the population lives in urban centres),
- 3) Rural areas (Thinly populated areas: more than 50% of the population lives in rural grid cells) (European Commission, 2018).

average. In terms of waste management, the share of municipal waste per person collected in Brežice is lower than average waste per person collected in Slovenia (SORS, n.d.b.).

The data that summarises Municipality Brežice from the socio-economic point of view is presented below in Figure A.40 and Table A.12 to Table A.14. Figure A.40 presents the population in Brežice, Table A.12 presents the main social, economic, and environmental indicators, Table A.13 presents the main statistical data for Brežice, and Table A.14 presents the tourism data for Brežice.

Figure A.40: Population pyramid in Brežice in 2018



Source: SORS. (n.d.b.)

Table A.12: Indicators for Brežice

Indicators for year 2018	Municipality	Slovenia
Density of population (per km ²)	90	102
Total increase (per 1,000 population)	-0,2	7
Mean age of population (years)	45	43
Registered unemployment rate (%)	10	8
Live births (per 1,000 population)	9	10
Deaths (per 1,000 population)	11	10
Natural increase (per 1,000 population)	-2,9	-0.4
Net migration (per 1,000 population)	3	7,2
Ageing index	158	131
Ageing index for men	130	108
Ageing index for women	187	155
Children in kindergartens (as % of all children aged 1-5)	78	83
Number of students (per 1,000 population)	29	37
Number of tertiary graduates (per 1,000 population)	7	8
Average monthly gross earnings (index, SI=100)	89	100
Average monthly net earnings (index, SI=100)	91	100
Registered unemployment rate for women (%)	11	9
Registered unemployment rate for men (%)	9	9
Number of dwellings, Dwelling Stock (per 1,000 population)	431	412
Dwellings with three- or more rooms, Dwelling Stock (% of all dwellings)	63	62

Indicators for year 2018	Municipality	Slovenia
Average useful floor space, Dwelling Stock (m ²)	86	82
Number of passenger cars (per 100 population)	57	55
Municipal waste collected (kg/person)	269	361

Source: SORS. (n.d.b.)

Table A.13: Data for Brežice

Data for year 2018	Municipality	Slovenia
Area km ²	268	20,273
Population	24,089	2,070,050
Number of persons in paid employment	7,123	872,772
Average monthly net earnings per person in paid employment (EUR)	988	1,093
Turnover of enterprises (EUR 1,000)	569,539	117,040,613
Men	11,893	1,030,234
Women	12,196	1,039,816
Natural increase	-69	-900
Total increase	-6	14,028
Number of kindergartens	10	968
Number of children in kindergartens	858	87,147
Number of elementary school pupils	1,993	186,328
Number of secondary school pupils (by residence)	822	73,110
Number of students (by residence)	709	75,991
Number of persons in employment (by residence)	9,732	872,772
Number of self-employed persons	1,156	92,569
Number of registered unemployed persons	1,101	78,474
Average monthly gross earnings per person in paid employment (EUR)	1,491	1,681
Number of enterprises	1,914	200,174
Number of dwellings, Dwelling Stock	10,388	852,181
Number of passenger cars	13,616	1,143,150
Municipal waste collected (tons)	6,660	804,811

Source: SORS. (n.d.b.)

With respect to tourism, in 2018, Brežice recorded a 4,2% increase in arrivals and 3,3% increase in overnight stays, compared to 2017. This increase is attributed to the foreign arrivals (16,4% increase) and overnight stays (14,4% increase). On the other hand, the trend in domestic arrivals and stays is negative. Brežice in the year 2018, recorded 8,8% less domestic arrivals and 9,6% less domestic overnight stays compared to 2017. (SORS, 2020a; 2020b).

Table A.14: Tourist arrivals and nights spent for Brežice

	Tourist arrivals 2018	Overnight stays 2018	Tourist arrivals 2017	Overnight stays 2017
Countries – Total	202,780	680,003	194,527	657,992
Domestic	85,345	274,917	93,615	303,952
Foreign	117,435	405,085	100,912	354,040

Source: SORS, 2020a; SORS, 2020b

II.1.2 Needs assessment

Interviews and analysis of the destination's tourism, carrying capacity, as well as overall socio-economic development, shows the following key needs (challenges, threats, problems, as well as strengths and opportunities) that are relevant for the scope of the project.

The need to better manage impact of tourism on environment via waste and water management

In general, there is a need for management in seasonal impact of tourism on drinking water consumption as well as managing the increased volume of wastewater treatment and seasonal municipal waste collection. Mainly, the environmental impacts are reflected in the large amount of waste collected and congested in the area of Terme Čatež. The destination needs to reduce the negative effects of high water consumption in the accommodation facilities, pollution of the rivers, erosion of the riverbanks and air pollution due to traffic.

More specifically, tourism providers need to separate the waste, inform their visitors/tourists about the necessity to reduce the amount of water consumed, educate their visitors to use less towels, use eco cleaning fluids and seek eco-labels for accommodations. There is a need for more investment in time and money in order to implement these measures, within which any bureaucratic obstacles need to be solved.

The need for an increased cooperation between economic actors

Within the municipality, economic actors need to engage in a more effective cooperation. Terme Čatež is by far the biggest provider in tourism in the municipality. It also plays an important role for the entire region in terms of attracting tourists. They are present in several foreign markets, and have accumulated knowledge of nearby markets, promotional channels and management functions. However, tourists staying in Terme Čatež spend most of their time there and do not explore other activities available in the municipality. Thus, there is a need for a better promotion of other activities outside the spa. There are many other attractions, yet they all represent unutilised tourist potential, with the exception of thermal water, the castle and museum of Brežice. Hence, in addition to cooperation with the Faculty of Tourism in monitoring tourist arrivals and tourist demand, there is a need for cooperation with other institutions, services and associations in the field of tourism in order to strengthen the promotion of local tourism potential.

As means of developing the marketing strategy, the website requires further development, including photo and video updates. This promotional strategy would also benefit from advertising Brežice as a year-round destination. Moreover, there is a requirement for additional camping/glamping areas together with implementation of events and promotional activities. Although in recent years, the quality in the area of gastronomy in Brežice has gradually improved, with consumers being more conscious, perceiving food as an experience and a compulsory element in the local environment in which they are staying, there is still need for improvement in this area. The accommodations need to cooperate more with local farmers to buy food from them.

While the wine offer is of better quality and more diverse on the Styrian side of the municipality, Brežice can explore synergies in attracting tourists who are interested in the wine experience.

Over time, however, the strategic need for joint cooperation of all municipalities in the region Posavje comes into play in order to act on the market as a single destination with a single brand. Moreover, further development of the destination requires strengthening of the cooperation with the Regional Development Agency, the Ministry of Economic Development and Technology and the Slovenian Tourist Organisation.

The need to counteract the ageing of the society and to attract young people

The municipality is experiencing a trend of rapid aging of the population, which is a result of negative natural growth, migration of the adult population and unsatisfactory life quality. The aging index exceeds the Slovenian average by more than 23 index points, with an even greater difference in the female part of the population. In recent years, there has also been a trend of negative net migration from abroad, while inter-municipal net migration has been positive. The share of young people and persons of working age is also lower than the Slovenian average, so it is expected that the population will age even faster.

The need for improvement of economic framework conditions and provision of services of general interest for residents and tourists alike

The high level of unemployment also indicates that the environment is not youth friendly. As a result, the destination also needs to focus on providing favourable socio-economic conditions in an effort to retain its youth. Moreover, a need for more attractive employment is identified. Many jobs, especially in the hospitality industry, are poorly paid. They are characterised by unfavourable working conditions, and influx of labour force from abroad is detected.

There are also needs connected to improvement of SGI provision. For example, the hospital Brežice needs to be improved, especially with regards to the emergency services, as during the summer, many tourists from Terme Čatež demand their services, yet there is no consideration with respect to this, from the government's side.

The need for a better mobility management

In the summertime, a bus line connects Brežice and Terme Čatež. However, in order to strengthen Brežice as a year-round destination, this line needs to be operational throughout the year.

Every September, the municipality of Brežice is included in the project European mobility week and organises a day without cars in the main street of the city. The interest in this event indicates that the municipality also feels greater needs with respect to mitigation of noise caused by public events in locations close to residential buildings and in the old town. This can be solved by better mobility management as well as cooperation and consensus-seeking with the residents.

Carrying capacity needs summary

The impact of tourism in Brežice is becoming very pronounced on the environment, residents as well as its infrastructure. There is also a substantial mismatch between provided services and infrastructure as well as the needs of local residents and tourists. Also, the lack of exploration of synergies between different stakeholders and economic actors prevents exploration of its full tourism potential. In addition, further needs are expected to arise due to the Covid-19 pandemic.

While the destination is interested in developing tourism throughout the year, there is several needs areas that need to be addressed, such as taking into account needs of the local economy, community, culture and environment. Awareness raising on the topic of water use, wastewater management, waste reduction methods, as well as modern digital marketing for tourist providers, digitisation of tourist offer and design of joint tourist packages need to be explored.

In order to seek sustainable and balanced development of the tourism offer, the strategic orientation of Brežice needs to be directed towards a green boutique destination for visitors seeking active/healthy experiences, peace and personal growth. Hence, establishing a collective branding system can be beneficial.

II.1.3 Policy and strategic orientation

Overview of relevant policy and strategic documents

The most relevant strategic documents defining strategic and policy orientation with regard to tourism and wider socio-economic framework in the destination are:

At local/municipality level:

- Integrated Transport Strategy;
- Spatial development strategy;
- Tourism Strategy of Municipality of Brežice 2017-2021.

Analysis of relevant policy and strategic documents and information from interviews

In 2017, the Municipality of Brežice accepted an Integrated Transport Strategy (OB, 2017a), which aims for a sustainable transport in the municipality for a period of five years. This strategy emphasises on the solution to traffic problems and the reduction of negative effects of transport on the environment. The five pillars of future traffic development, set forth by the strategy are walking, cycling, public passenger transport, optimising passenger car use, and sustainable planning and public awareness.

In general, there are various institutions involved in the field of environmental protection. During spring, the municipality of Brežice engages in activities such as encouraging waste collection campaigns; encouraging the separation of waste; helping local food producers in the marketplace, through various leaflets and initiatives on social networks and other websites. These measures precisely focus on local problems such as promoting the reduction of the number of grave candles.

The Spatial development strategy (UL, 2006) strives to determine the intended use of land, in other words more details about the specific land use, i.e. for education, etc. In addition, it seeks to identify protection areas such as cultural heritage, nature, water resources, agricultural land, etc. The strategy attempts to further direct the expansion of land equipped with communal infrastructure. Moreover, it aims to determine the spatial measures with the use of instruments by the municipality (or the state) to be able to implement the arrangements including temporary measures, legal pre-emption rights, expropriations and restrictions on property rights, land consolidation, reconstruction measures, etc. The strategy also work towards determining the criteria and conditions for construction in each spatial unit.

As for the field of tourism, in October 2019, a destination management office was established for the destination Brežice – that is, for the municipality of Brežice. In the recent years, tourism management has developed to become one of the central goals in tourism. The purpose of the destination management office is to focus on comprehensive planning, organisation, management, monitoring and evaluation of tourism development, and marketing.

The Table A.15 and Table A.16 below, represent the most relevant aspects of strategic and policy orientation with regards to tourism, carrying capacity as well as related socio-economic development aspects and issues, based on a review of strategic documents and conducted interviews. In particular, policies, measures and goals from the Tourism Strategy of Municipality of Brežice 2017-2021(OB, 2017b) are presented. This document is “a strategy for a better quality of life and a better authentic experience of guests in the municipality of Brežice”. Taking this into account, the operational objectives and actions created by the municipality, are presented in Table A.15. In addition to competitiveness and sustainable tourism development, these priority objectives include managing the destination in the direction of integration and synergies, and partnership between stakeholders; quality and innovation; intensive and digital marketing, etc.

Since the strategy is very focused on sustainability issues, it also includes 12 sustainable tourism development goals, which are presented below in Table A.16. These sustainable tourism development goals range from economic feasibility and social justice to biodiversity, resource efficiency, etc. It is important to note that policies and strategic orientation are expected to change due to Covid-19 pandemic.

Table A.15: Priority i.e. operational objectives and actions

Priority or operational objective	Measures
Priority objective 1: Managing the destination of Brežice in the direction of integration and synergies, and partnership between stakeholders	Action 1: Establish a system of continuous partnership communication between the public, private and civil (non-government) sector and within the private sector Action 2: Establishing a Destination Management Model Action 3: Setting up a system for monitoring the implementation of the strategy Action 4: Collaboration and networking with other municipalities, region and national level

Priority or operational objective	Measures
Priority Objective 2: Sustainable concept of tourism development	<p>Action 1: Brežice – a fully organised green destination with a recognised destination brand – DMO3 Brežice</p> <p>Action 2: Overall sustainable orientation of the municipality of Brežice</p> <p>Action 3: Brežice, an accessible destination</p> <p>Action 4: Brežice brand for raising the quality and visibility of the local offer</p>
Priority objective 3: Qualifications of all stakeholders in the hospitality and tourism industry	<p>Action 1: Informing residents and suppliers about projects, training to understand the needs of tourists and to promote hospitality</p> <p>Action 2: Measuring tourism performance (physical and financial indicators)</p>
Priority objective 4: Intensive and digital marketing	<p>Action 1: Complete overhaul of the most important printed communication materials</p> <p>Action 2: Content refresh and optimisation of the website www.discover-brežice.com</p> <p>Action 3: Establishing active work on social networks</p> <p>Action 4: Development and active management of customer relations ("Customer Relationship Management")</p> <p>Action 5: Strengthening the network of indirect distribution partners</p>
Priority objective 5: Quality and innovation	<p>Action 1: Designing a new waterfront tourism product</p> <p>Action 2: Innovative ways of marketing the most important attractions at the destination</p> <p>Action 3: Innovative souvenirs (from stories and benefits of offer to souvenirs)</p> <p>Action 4: Environmental quality labels and labels for quality and specialisation</p>
Priority objective 6: Competitiveness	<p>Action 1: Renovation and establishment of a strong tourist brand with a clear identity</p> <p>Action 2: Achieve rapid brand recognition and provide broad brand support</p> <p>Action 3: Increase tourist mobility between Brežice and Terme Čatez (cycle paths, bicycles, electric bicycles, green electric vehicles (scooters) and other transport options)</p> <p>Action 4: Additional investments and marketing of sports tourism</p> <p>Action 5: Supply planning and marketing of a new water center (HE Brežice)</p>

Source: OB, 2017b

Table A.16: 12 sustainable tourism development goals in Brežice

Goals	Description
1. Economic Feasibility	To build tourism in Brežice on a real economic basis so that it will be able to survive and develop. It is necessary to understand the market demands and expectations of visitors, to build a good destination concept, to provide favorable conditions for the development of activities and entrepreneurship considering recognised local capacities.
2. Local prosperity	Increase the contribution of tourism to enhancing prosperity in the municipality of Brežice by increasing business connections (business arrangements), building a diversified supply for identified target markets and segments, extending length of stay, increasing visitor spending and reducing leakages.
3. Quality of employment	Through the development of tourism and tourism-related activities, increase employment opportunities, respect and enforce labor laws, encourage companies to provide employee education and career opportunities, and to provide social security for those who have lost their jobs due to occasional entrepreneurial problems.
4. Social justice	Ensure that the economic and social benefits of tourism are also channeled to support social programs, and encourage tourists and tourists alike to sponsor and support projects "for the common good", developing income opportunities for people with disabilities, etc.

Goals	Description
5. Visitor satisfaction	Ensure visitors' expectations are fulfilled by monitoring the quality of services and monitoring their experience and satisfaction, by providing useful information, by providing accessibility to mobility impaired visitors, and by providing opportunities for visitation also to socially or economically disadvantaged groups.
6. Local control	Involvement and empowerment of the local community in planning, managing and deciding on tourism development in Brežice, promoting partnerships and effective decision-making, respecting and taking into account the specific features of individual areas or population groups within Brežice.
7. Community well-being	Maintain and improve the quality of life in Brežice by appropriately allocating visitor volumes, schedules and site loads, by carefully planning and managing tourism businesses and infrastructure, promoting the sharing of supply and services by both residents and visitors, promoting a responsible visitor attitude to the rules and destination lifestyle.
8. Cultural wealth	Respect and enhance cultural and historical heritage, ensure proper management and protection of monuments, appropriate inclusion and treatment of heritage in the wider (influential) area of individual sites, provide education and awareness of the local community about the importance and ways of presenting cultural heritage, traditions and customs.
9. Landscape coherence	To provide an appropriate way of placing tourism projects in the local environment, to ensure the proper appearance and integration of tourist buildings and activities, to prevent the physical and visual deterioration of the environment; maintain the cultural landscape as one of the long-term foundations of tourism.
10. Biodiversity	Support the conservation of natural areas, habitats and wildlife and minimise the damage caused to them.
11. Resource efficiency	Ensure rational use of natural resources, take into account the actually available capacities of natural and other resources in planning tourism development, reduce water consumption in tourism and energy, especially from non-renewable sources, ensure rational and efficient use of raw materials, promotion of "reduce – reuse – recycle".
12. Environmental cleanliness	To reduce air, water and land pollution and the amount of waste generated by tourism companies and visitors, to increase and promote the use of sustainable forms of transport, to reduce the use of environmentally hazardous chemicals, to prevent the discharge of effluents into waterways, to reduce and sort waste, to carefully plan and develop new tourist capacities in accordance with the Green Scheme of Slovenian Tourism (Green destination in accommodation).

Source: OB, 2017b

Summary of policy and strategic priorities

On the whole, Brežice has been striving for improvements, specifically in the field of spatial planning, transport and mobility, and sustainable development in order to consider and advance social and environmental needs to a higher standard. For this purpose, there has been a stronger focus and emphasis on a more integrated tourism management. This has been done through establishment of a tourism destination management office, which aims to concentrate on different tourism strategies. This is reflected in the adoption of the Tourism Strategy of Municipality of Brežice 2017-2021.

II.1.4 Interviews

Altogether, interviews cover general questions related to the destination and the sustainable tourism approach, as well as more specific questions associated with the carrying capacity dimension and perceived obstacles. The information provided in the interviews supplement the studies and the data collected by regional authorities and organisations as well as the data collected from statistical offices. The information collected during interviews has been

integrated into the overview of the destination provided in step 1.. The stakeholders who were most capable of answering the interview questions were identified and presented in Table A.17. They possess the knowledge of the situation of the destination, in addition to issues, needs and policies, with regards to tourism and carrying capacity as well as regional development.

Table A.17: Overview of interviewed stakeholders

Interviewee name	Institution/organisation	Position	Contact details
Interviewee 1	Entrepreneurship, Tourism and the Youth Organisation Brežice	Entrepreneurship, Tourism and the Youth Organisation Brežice	Upon request
Interviewee 2	Entrepreneurship, Tourism and the Youth Organisation Brežice	Entrepreneurship, Tourism and the Youth Organisation Brežice	Upon request
Interviewee 3	SEBLU	Project leader of a project of Slovenian Research Agency	Upon request

Source: Consortium, 2020

II.2 Step 2

II.2.1 Development of a systemic picture

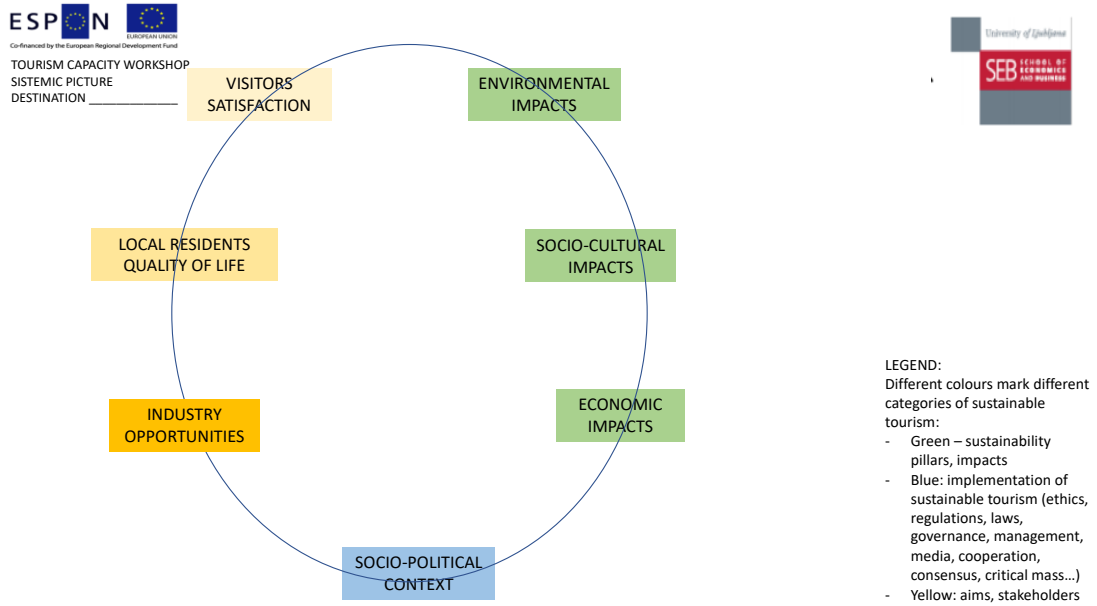
Preliminary systemic picture

In the destination workshop, the case study authors have followed the ESPON Carrying capacity methodology. Prior to the workshop, a systemic picture and indicator catalogue for destination has been prepared. Experts have been trained to use the same methodological approach in all four destinations. After the meeting, the evaluation by the case study authors has confirmed the proposed methodological approach, which has been very successful. All elements of systemic picture model (see figure below) have been well addressed.

The systemic picture grid offers possible discussion areas for workshop participants with regards to capacity, impacts and challenges. Green elements refer to sustainability pillars and impacts of tourism in the area of each. Yellow fields denote the destination's stakeholders subjective impressions on the satisfaction with tourism presence and opportunities. The socio-political context, coloured blue, captures the dimension of destination's management (including governance and leadership), collaboration among destination's stakeholders, consensus building, strategy, legislation, sustainability awareness, etc. Figure A.42 represents the systemic picture with possible connections already in place, developed by experts as a basis for the workshop.

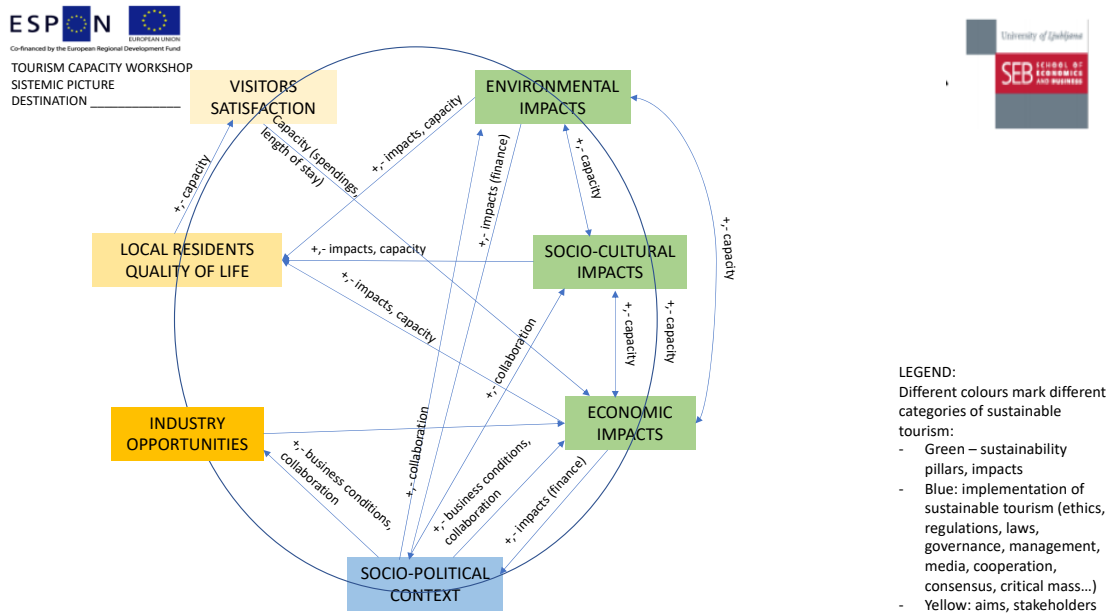
Interactions among the main boxes address the capacities, impacts and challenges. Example of such connections are pollution stemming from tourism, resident's dissatisfaction with the development of tourism presence, financial flow from tourism attractions for the communal infrastructure in the destination, collaboration between the community and tourism earnings for development of the community, etc.

Figure A.41: Systemic picture model prepared prior to the workshop



Source: Consortium, 2020.

Figure A.42: Systemic picture grid



Source: Consortium, 2020.

This proposal of preliminary systemic picture was shared with the participants during the introduction to the workshop, in order to give an informed and structured basis for its further elaboration (in the first part of the workshop) and for the reflection on indicators (in the second part of the workshop).

II.2.2 Identification of context indicators

Prior to the workshop, an indicator catalogue concerning the socio-economic context of the destination was composed. The appropriate context indicators, selected in order to capture main features of the preliminary systemic picture for Brežice, are presented in the table below.

Table A.18: Overview of availability of context indicators

Indicator	Source	Territorial unit	Time	Comments
Area km ²	SORS, destination	Municipality	Annually	Available
Population	SORS, destination	Municipality	Annually	Available
Number of persons in paid employment	SORS, destination	Municipality	Annually	Available
Turnover of enterprises (EUR 1,000)	SORS, destination	Municipality	Annually	Available
Number of enterprises	SORS, destination	Municipality	Annually	Available
Density of population (per km ²)	SORS, destination	Municipality	Annually	Available
Registered unemployment rate (%)	SORS, destination	Municipality	Annually	Available
Natural increase (per 1,000 population)	SORS, destination	Municipality	Annually	Available
Ageing index	SORS, destination	Municipality	Annually	Available
Average monthly gross earnings (index, SI=100)	SORS, destination	Municipality	Annually	Available
Employment/population ratio (%)	SORS, destination	Municipality	Annually	Available
Municipal waste collected (kg/person)	SORS, destination	Municipality	Annually	Available
WIFI access	Tourism 4.0	Municipality	Annually	If available
Mobile data access	Tourism 4.0	Municipality	Annually	If available
Bus tickets sold	Public/private authorities	Municipality	Annually	If available
Railway tickets sold	Public/private authorities	Municipality	Annually	If available
Air quality data	ARSO	Municipality	Annually	If available
Air pollution: PM10	Municipality data	Municipality	Yearly	If available
Water quality: parameters	Municipality data	Municipality	Yearly	If available

Source: Consortium, 2020 and SEBLU ESPON project, 2020; SORS, n.d., c

II.2.3 Identification of tourism indicators and data

The indicator catalogue concerning the most important tourism-related aspects of the destination has been prepared prior to the workshop. This selection has been based on indicators selected by the consortium, as well as ETIS, GSST, CRP, and national destination tourism statistical data. During the workshop, the best fitting indicators for Brežice were identified and are presented in the table below.

Table A.19: Overview of availability of tourism indicators

Indicator name	Source	Territorial unit	Time	Comments
Percentage of tourism enterprises taking actions to reduce water consumption	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises separating different types of waste	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises that take actions to reduce energy consumption	Municipality data	Municipality	Yearly	If available
Tourism density – destination	SORS	Municipality	Yearly, monthly	Available
Tourism intensity – destination	SORS	Municipality	Yearly, monthly	Available
Visitation concentration per day or season	Municipality data	Municipality	Yearly	If available

Indicator name	Source	Territorial unit	Time	Comments
Residents' satisfaction with tourism	Municipality data	Municipality	As per conducted survey	Available, GSST
Visitors' satisfaction with visitation	Municipality data, data on Tripadvisor and booking portals	Municipality	As per conducted survey	Available, GSST, available on TripAdvisor and booking portals
Arrivals seasonality	SORS	Municipality	Yearly, monthly	Available
Number of tourists/visitors per 100 residents	Municipality data	Municipality	yearly	If available
Visitors – per attraction	Attraction operator	Attraction	Yearly, monthly	If available
Importance of tourism 1: % of tourism in GDP of the destination	Municipality data	Municipality	yearly	If available
Importance of tourism 2: % of tourism employees in total employment in the destination	Municipality data	Municipality	yearly	If available
Arrivals: Number	SORS	Municipality	Yearly, monthly	Available
Overnights: number	SORS	Municipality	Yearly, monthly	Available
Average length of stay	SORS	Municipality	Yearly, monthly	Available
Arrivals growth: %	SORS	Municipality	Yearly, monthly	Available
Overnights growth: %	SORS	Municipality	Yearly, monthly	Available
Visitors – destination	SORS	Municipality	Yearly, monthly	Available
Average length of stay	Municipality data	Municipality	yearly	If available
Number of beds in hotels and hostels per resident	Municipality data	Municipality	yearly	If available
Growth in number of beds in hotels and hostels in the last 5 years in %	Municipality data	Municipality	yearly	If available
Tourism industry satisfaction with tourism opportunities	Municipality data	Municipality	As per conducted survey	Available, GSST (check confirmed that quantitative data is not available)
Number of new businesses and persons involved in tourism	Municipality data	Municipality	yearly	If available

Source: Consortium, 2020 and SEBLU ESPON project, 2020; SORS, n.d., c

II.2.4 Systemic Picture Workshop

Participants

Table A.20: Overview of invited participants

Participant	Institution/organisation	Position
Participant 1	Regional Development Agency Posavje	Project leader
Participant 2	Posavje Museum Brežice	Director
Participant 3	Terme Paradiso	Head of sales
Participant 4	Terme Čatež	Marketing and public relations
Participant 5	Regional Park Kozjansko	Head of general affairs
Participant 6	Public utilities Brežice	Head of the utilities sector

Participant	Institution/organisation	Position
Participant 7	Integral Brežice	Head of commercial activities
Participant 8	Municipality Brežice	Head of department of space
Participant 9	Entrepreneurship, Tourism and the Youth Organisation Brežice	Coordinator
Participant 10	School of Economics and Business, Ljubljana University	Researcher

Note: Full list by names available from ESPON SEBLU

Outcomes of the Systemic Picture Workshop

Discussion of destination's needs as well as policy and strategic orientation

Validation of needs assessment

How did the participants assess expert assessment of destination's needs? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

The participants fully agreed with expert findings that strategic orientation of Brežice needs to be directed towards a green boutique destination for visitors seeking active and healthy experiences, peace and personal gain. For this purpose, there is a need for establishment of a collective branding system. Also, requirements for additional camping/glamping areas, better cuisine and implementation of events and promotional activities have been identified. It was further emphasised that the destination needs a cooperation between different providers, so that they can put together packages and present different possibilities of leisure time in the Brežice area to the tourists. One of the most important needs is the cooperation with the Faculty of Tourism for monitoring tourist arrivals and tourist demand as well as cooperation with other institutions, services and associations in the field of tourism. Participants also agreed with respect to the focus on the digitisation of the website; photo and video updates on the website as necessary to attract tourists. It is important to also bear in mind that the destination needs to focus on out-of-season tourists as well and manage the impact of tourism on drinking water consumption. That is to say, it is crucial to manage increased volume of wastewater treatment and seasonal municipal waste collection activity.

However, the experts did not anticipate that severe problems regarding the seasonality are perceived as very important by the destination stakeholders. Participants noted large quantities of collected waste and high water consumption during high season. As a result, it is necessary to manage the seasonal impact of tourism on drinking water consumption, increased volume of wastewater treatment and seasonal municipal waste collection.

Moreover, it was emphasised that social conditions in Brežice are less than favourable. That is to say, population in the destination is very old and there is a high level of emigration and unemployment.

All in all, there is a lack of cooperation between companies as well as between the destination and regional and national authorities. There is a need for the private sector to put together packages and present different possibilities of leisure time in the Brežice area to the tourists.

Validation of policy and strategic orientation

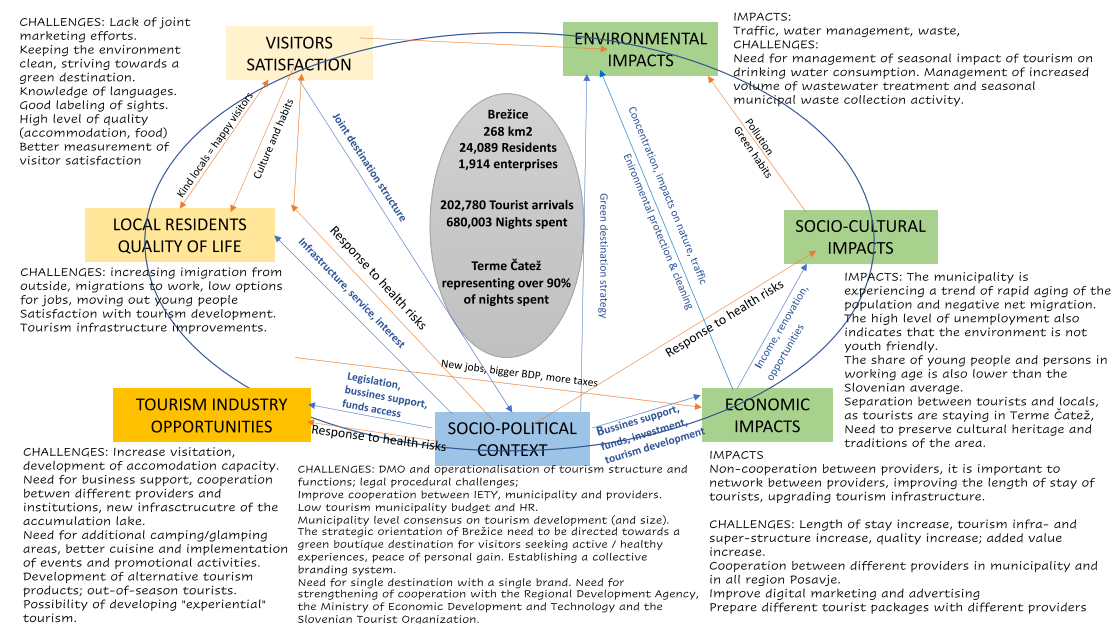
How did the participants assess expert assessment of destination's policy and strategic orientation? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

Overall, the picture emerged from the Municipality of Brežice as a health resort municipality with the dominance of the main tourist provider Terme Čatež, which aims to develop the destination to attract Terme Čatež tourists to see other sights. Participants agreed with the developed policy overview, as well as many additional suggestions for improvement. The exchange with the destination stakeholders revealed that real-life situation as perceived by the local stakeholders shows additional issues that are present in the destination.

Final systemic picture

The figure below presents the final outcome of the systemic picture, developed with the workshop participants.

Figure A.43: Systemic picture Brežice – final (workshop outcome)



Source: Brežice destination workshop, 12.3.2020

Analysis of the systemic picture

What was particularly striking/interesting difference between expert systemic picture and those prepared by participants? What important points about the systemic picture did the group work and discussions centre around? What important points about the systemic picture did the group work and discussions centre around?

The issues raised by the participants covered all elements of the systemic picture. Therefore, the socio-political context was well addressed and industry opportunities in terms of cooperation have been put forward. The need to protect the natural environment was further identified and socio-cultural aspects of the destination were thoroughly discussed. Moreover, the economic dimension was connected to industry opportunities and was linked to the social characteristics of the destination. Aspects of the systemic picture, including various challenges and impacts, are presented below.

Visitor satisfaction	<p>Challenges</p> <ul style="list-style-type: none"> – Lack of joint marketing efforts. – Keeping the environment clean, striving towards a green destination. – Knowledge of languages. – Good labelling of sights. – High level of quality (accommodation, food). – Better measurement of visitor satisfaction.
Local residents quality of life	<p>Challenges</p> <ul style="list-style-type: none"> – increasing immigration from outside, migrations to work, low options for jobs, young people moving out. – Satisfaction with tourism development. – Tourism infrastructure improvements.
Tourism industry opportunities	<p>Challenges</p> <ul style="list-style-type: none"> – Increase visitation. – Development of accommodation capacity. – Need for business support, cooperation between different providers and institutions. – New infrastructure of the accumulation lake. – Need for additional camping/glamping areas, better cuisine and implementation of events and promotional activities. – Development of alternative tourism products; out-of-season tourists. Possibility of developing “experiential” tourism.
Socio-political context	<p>Challenges</p> <ul style="list-style-type: none"> – DMO and operationalisation of tourism structure and functions. – Legal procedural challenges. – Improve cooperation between IETY, municipality and providers. – Low tourism municipality budget and HR. – Municipality level consensus on tourism development (and size). – The strategic orientation of Brežice need to be directed towards a green boutique destination for visitors seeking active/healthy experiences, peace of personal gain. Establishing a collective branding system. – Need for single destination with a single brand. Need for strengthening of cooperation with the Regional Development Agency, the Ministry of Economic Development and Technology and the Slovenian Tourist Organisation.
Economic context	<p>Challenges</p> <ul style="list-style-type: none"> – Non-cooperation between providers, it is important to network between providers, improving the length of stay of tourists, upgrading tourism infrastructure. – Length of stay increase, tourism infra- and super-structure increase, quality increase; added value increase. – Cooperation between different providers in municipality and in all region Posavje. Improve digital marketing and advertising. – Prepare different tourist packages with different providers.
Socio-cultural context	<p>Challenges</p> <ul style="list-style-type: none"> – The municipality is experiencing a trend of rapid aging of the population and negative net migration. – The high level of unemployment also indicates that the environment is not youth friendly. – The share of young people and persons in working age is also lower than the Slovenian average. – Separation between tourists and locals, as tourists are staying in Terme Čatež. – Need to preserve cultural heritage and traditions of the area.

Environmental context	Challenges <ul style="list-style-type: none"> – Traffic, water management, waste. – Need for management of seasonal impact of tourism on drinking water consumption. Management of increased volume of wastewater treatment and seasonal municipal waste collection activity.
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Identification and verification of indicators and data sources

How did the participants assess the expert suggestion on indicators and data sources?

The participants have identified the key indicators to be used for measuring the carrying capacity from the selection provided by experts. Brežice is already a member of the Green Scheme of Slovenian Tourism and they measure many relevant indicators. All the collected indicators were discussed, and the important ones for Brežice were included in the proposed context and tourism indicators' list. The availability of indicators is limited to statistical indicators and indicators from the GSST, which also provides the tourism stakeholders' satisfaction studies.

Additional comments and observations

The workshop was conducted electronically due to the COVID-19 crisis. The cooperation was nevertheless very successful and participants contributed many great ideas and offered the destination-specific information, including relevant indicators for the destination and guidance on the issues that Brežice is currently facing.

II.3 Step 3

II.3.1 Data collection

The data collection is based on Table A15 and A16 (see step 2) which include the identified territorial context and tourism indicators. The suggested indicators are based on the municipality level with one exception – water quality for Sava and Krka. In order to identify the most important indicators from the stakeholder perspective the involved stakeholders indicated 19 indicators upon their availability and importance for their tourism destination which represent their preferences (see Table A.11).

Table A.21: Most important indicators for the stakeholders in Brežice

Indicator name	Source	Territorial unit	Time	Access to the data ⁵	Data integrated in the Dashboard
Population	SORS	Municipality Brežice	Yearly	yes	yes
Number of persons in paid employment	SORS	Municipality Brežice	Yearly	yes	yes
Turnover of enterprises (1,000 EUR)	SORS	Municipality Brežice	Yearly	yes	yes
Number of enterprises	SORS	Municipality Brežice	Yearly	yes	yes

⁵ Access to the data is only given if the data is open access data.

Indicator name	Source	Territorial unit	Time	Access to the data ⁵	Data integrated in the Dashboard
Density of population (per km ²)	SORS	Municipality Brežice	Yearly	yes	yes
Registered unemployment rate (%)	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Natural increase (per 1,000 population)	SORS	Municipality Brežice	Yearly	yes	yes
Ageing index	SORS	Municipality Brežice	Yearly	yes	yes
Average monthly gross earnings (index, SI=100)	SORS	Municipality Brežice	Monthly	yes	no
Employment/population ratio (%)	SORS	Municipality Brežice	Annually	yes	yes
Municipal waste collected (kg/person)	SORS	Municipality Brežice	Yearly	yes	yes
Water quality: parameters: Chemical conditions	ARSO	Sava and Krka	Yearly	yes	no
Number of tourists/visitors per 100 residents (arrivals/residents)	Tourist Board Data	Municipality Brežice	Yearly, monthly	yes	yes
Arrivals: Number	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Overnights: number	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Average length of stay	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Arrivals growth: %	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Overnights growth: %	SORS	Municipality Brežice	Yearly, monthly	yes	yes
Number of beds in hotels and hostels per resident (1=nr. of bed places, 2=per resident)	Tourist Board Data	Municipality Brežice	Yearly, monthly	yes	no

Source: Consortium 2020

Table A.12 provides an overview of the 24 indicators included in the database for all Slovenian municipalities. The 14 selected indicators which are based on the stakeholders preferences are included in Table A.11.

Table A.22: Indicators in the database (alphabetical order)

Indicator	Time series for Brežice
Ageing	2008-2019
Population >=65/Population <=14	2008-2019
<Methodological Explanations: Slovenia>	

Indicator	Time series for Brežice
Arrivals	2008-2019
Tourist Arrivals	
<Methodological Explanations: Slovenia>	
Arrivals Change, Overnights Change	200-2019
Annual Change in %, Base Year is Previous Year	
Bedspaces	2008-2017
Number of Indivisible Units and Bedspaces that are Available to Tourists	
<Methodological Explanations: Slovenia>	
Bedspaces Change	2009-2017
Annual Change in %, Base Year is Previous Year	
Bedspaces Intensity	2008-2017
Bedspaces/Population	
Employment	2005-2019
Persons in Employment by Municipalities of Employment	
<Methodological Explanations: Slovenia>	
Employment Ratio	2002-2016
% of Labour Force within the Working Age Population	
<Methodological Explanations: Slovenia>	
Enterprises	2008-2018
Number of registered legal or natural person, which had either turnover or employment or investments during the reference year.	
<Methodological Explanations: Slovenia>	
Green Certificate	2020
Tourism Providers with Slovenia Green Label	
<Methodological Explanations: Green Scheme of Slovenian Tourism>	
Income	2005-2019
Average Monthly Cross Earnings	
<Methodological Explanations: Slovenia>	
Length of Stay	2008-2019
Overnights/Arrivals	
Natural increase	1995-2018
Difference between the Number of Births and Deaths	
<Births – Methodological Explanations: Slovenia> <Deaths – Methodological Explanations: Slovenia>	
Overnights	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Population	2008-2019
<Methodological Explanations: Slovenia>	
Population density	2008-2019
Population/Square Kilometer Surface	
Seasonality	2008-2019
Gini Coefficient based on Monthly Bednights	
Surface	2020
Square kilometre surface covered by the municipality's borders	
Tourism Density	2008-2019
Arrivals/Square Kilometer Surface of the Municipality	
Tourism Intensity	2008-2019
Arrivals/Population	
Turnover	2008-2018

Indicator	Time series for Brežice
...of enterprises (1,000 EUR) is the total amount that the enterprise settled with sale of goods, material and performed services in the reference year. It is measured on the basis of selling prices stated on invoices and other documents less discounts at sale or later on and the value of returned quantities. It includes all costs and charges linked to the buyer and excludes all duties and taxes on the goods or services invoiced by the unit and value added tax, possible sale of fixed assets, financial turnover, subsidies and other extra turnover. Data on turnover of enterprises from 2013 also included turnover of banks and savings banks.	
<Methodological Explanations: Slovenia>	
Unemployment	2005-2016
% of Registered Unemployed within the Active Population	
<Methodological Explanations: Slovenia>	
Waste	2008-2018
Municipal Waste Collected by Public Waste Removal Scheme (kg/capita)	
<Methodological Explanations: Slovenia>	

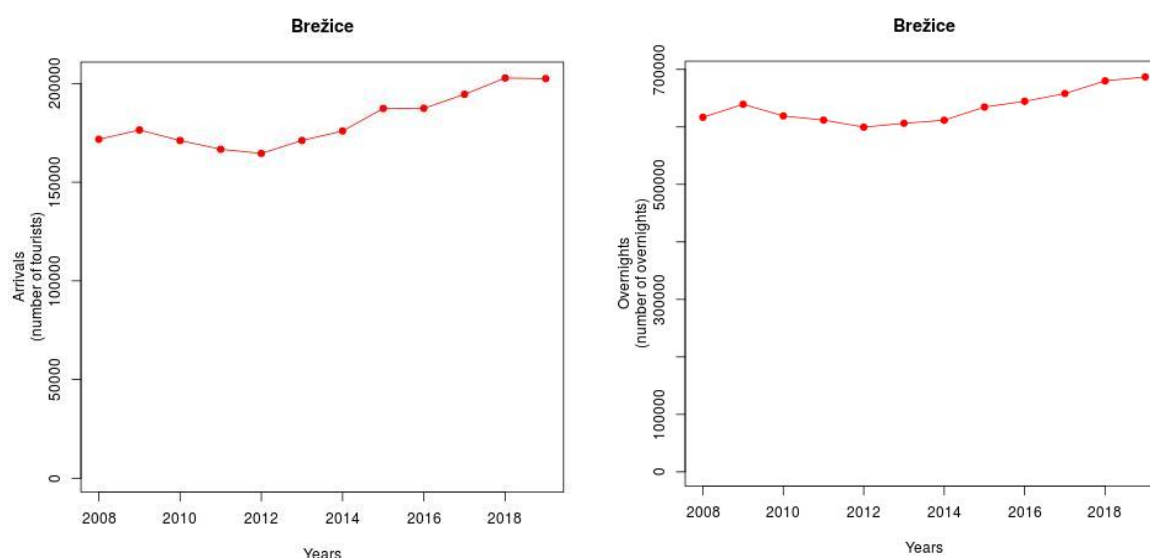
Source: Consortium 2020

II.3.2 Tourist flow estimation

The tourist flow estimation can be based on a variety of available indicators in the database, i.e. arrivals, arrivals change, length of stay, seasonality. Note: scale of y-axis may differ between the plots for two municipalities, so one should take that into account in interpretations.

In order to analyse the development of tourist flows over time the dashboard allows a selection of different indicators. The most meaningful indicators for such an analysis are arrivals and overnights as well as length of stay. Figure A.44 shows that both arrivals and overnights increased over time but only moderately.

Figure A.44: Arrivals and Overnights in Brežice 2008-2019

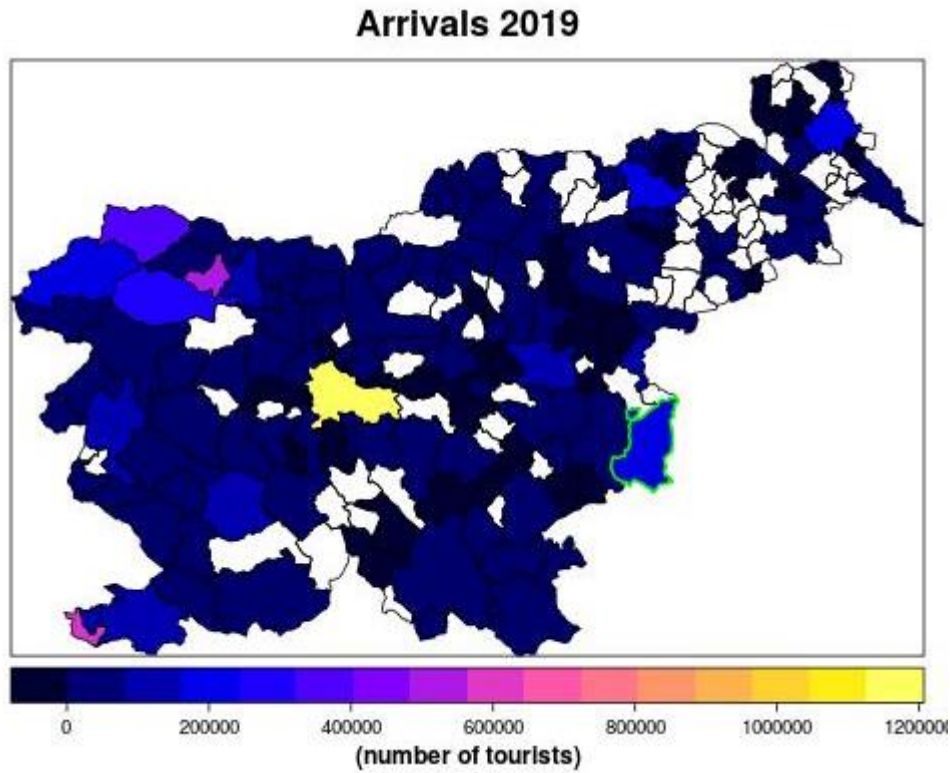


Source: Consortium 2020

Compared to other Slovenian municipalities, Brežice ranges within the group of municipalities belonging to the group of destinations well above the Slovenian average. Figure A.45 provides an overview of arrivals in 2019 for all Slovenian municipalities. The spatial benchmark helps to

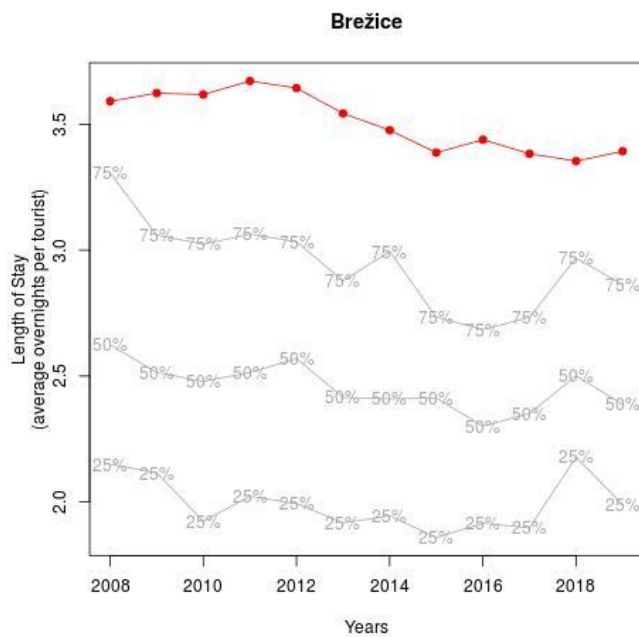
see how Brežice is exposed to tourism in comparison to all other municipalities. Brežice, the municipality with the green border, shows similar arrival figures like for example Bohinj a neighbouring municipality of Bled in the Julian Alps or Moravske Toplice which is also a destination with a thermal bath.

Figure A.45: Spatial Benchmark – Arrivals



Source: Consortium 2020

Figure A.46: Length of stay 2008-2019

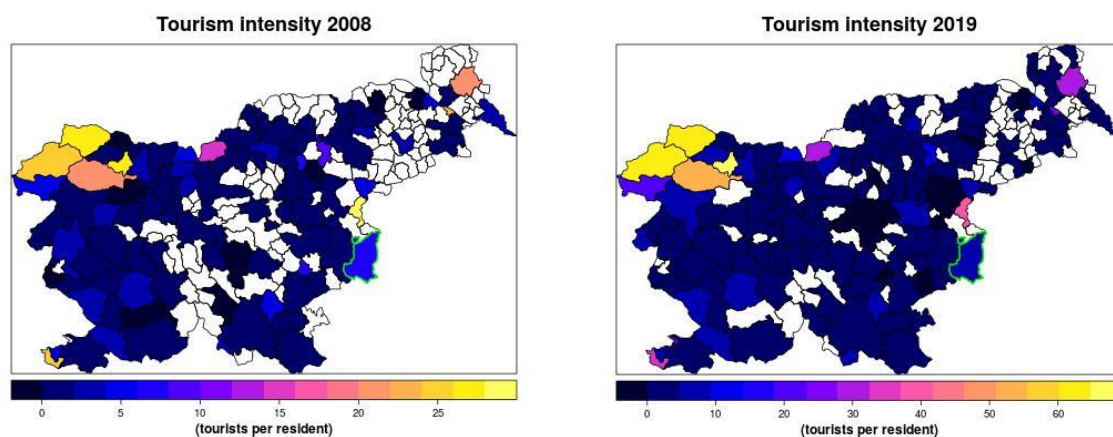


Source: Consortium 2020

The indicator length of stay follows a relative stable trend over time (see Figure A.46) and Brežice has also constantly been above the 75% quartile compared to other municipalities of Slovenia. Until 2012 tourists stayed longer than three and a half nights in Brežice and from 2013 a slightly declining trend is visible but overall tourists stay for example much longer than the Slovenian average, ranging within the top 25% out of all Slovenian municipalities in terms of the length of stay. One of the reasons might be the thermal bath where tourists seem to stay longer than in other types of destinations. With a combined package of other regional attractions, the destination can possibly increase the number of tourists as well as their length of stay.

In order to measure the pressure on local residents, tourism intensity (arrivals/population) can be taken as an indicator. Figure A.47 visualizes Slovenian municipalities for the years 2008 and 2019. Brežice is the municipalities with green borders. Compared to other destinations, the ratio of seven arrivals per population in 2008 and eight in 2019 is relatively low. Therefore the pressure on residents is still smaller compared to other destinations for example in the Julian Alps or in Moravke Toplice.

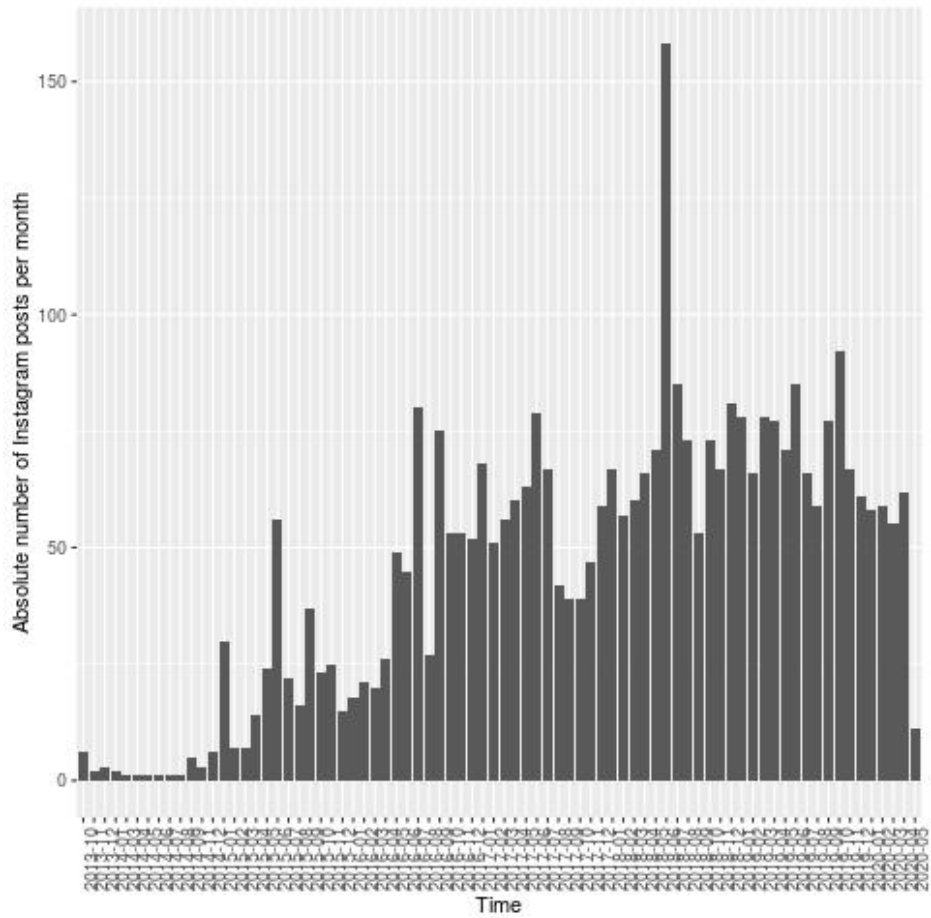
Figure A.47: Tourism intensity 2008 and 2019



Source: Consortium 2020

In addition, Instagram data can provide additional insights into the specific tourist flows. Figure A.48 provides an overview of the available Instagram posts in the Dashboard steadily increasing since 2014.

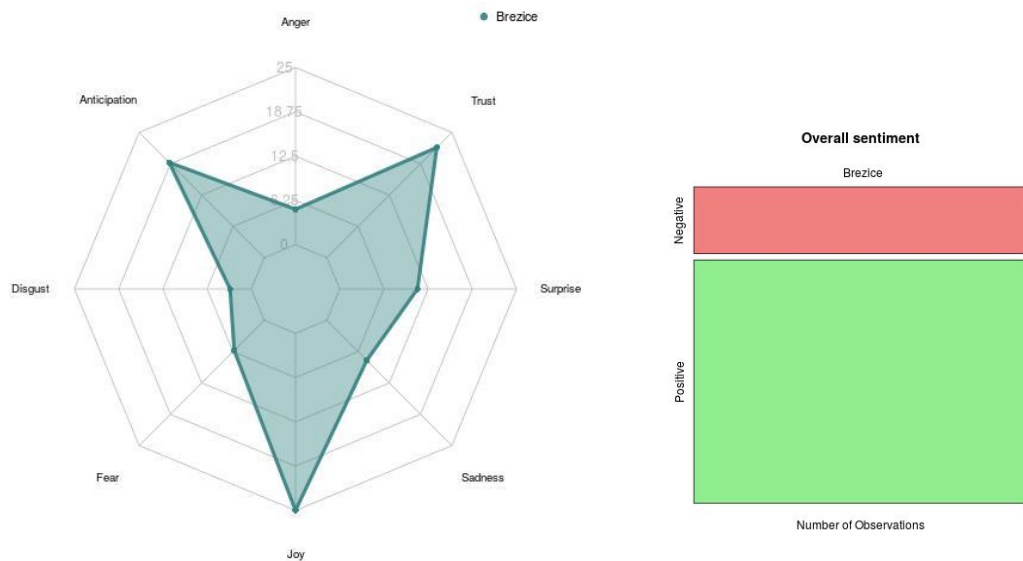
Figure A.48: Time series of Instagram posts for Brežice



Source: Consortium 2020

Figure A.49 provides an overview of the overall sentiment which seems to be quite positive and mainly related with emotions like joy, trust, and anticipation.

Figure A.49: Instagram posts



Source: Consortium 2020

II.3.3 Tourist flow prediction

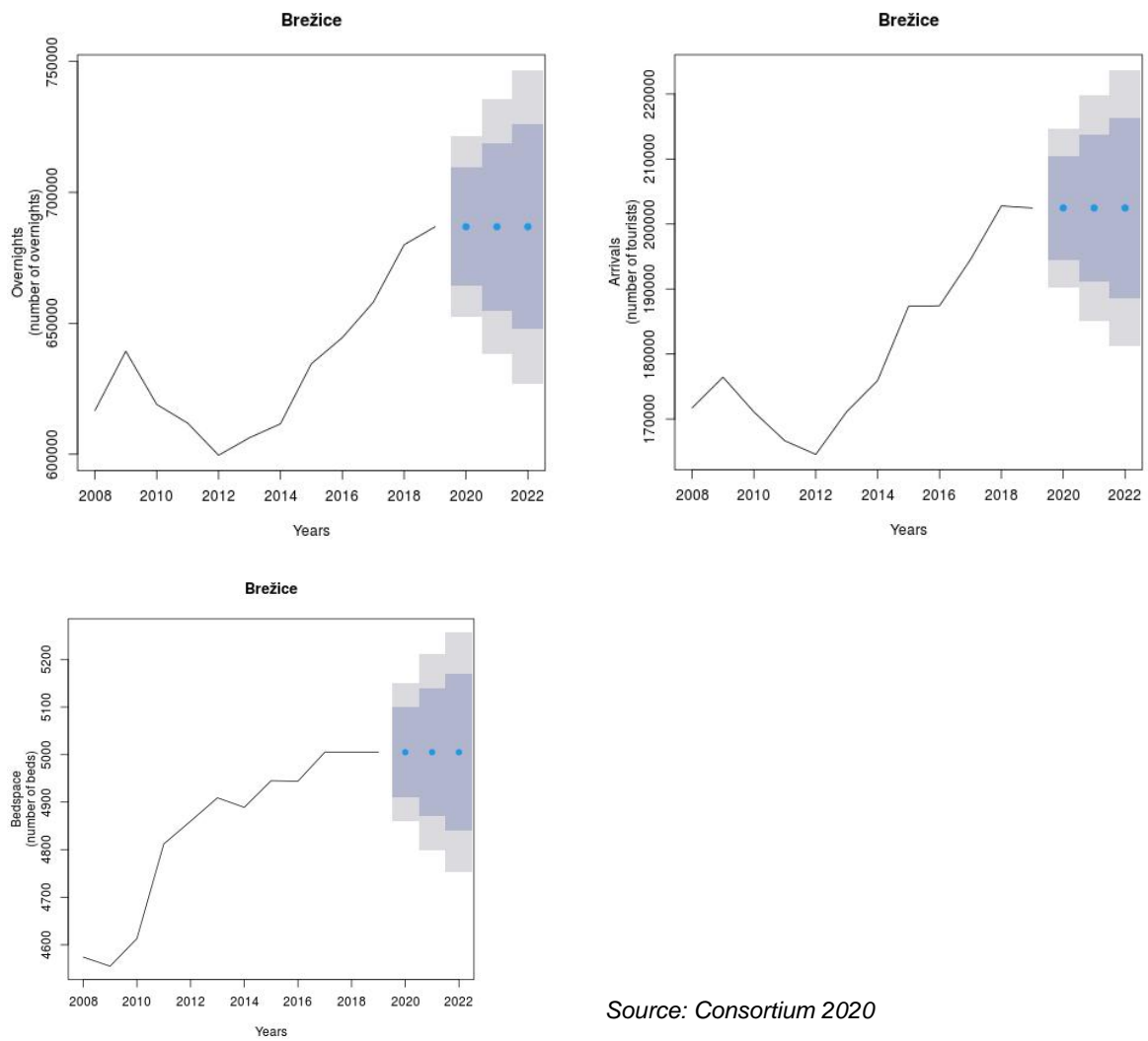
Out-of-sample annual forecasts for arrivals and overnights for the next three years are produced using the “forecast” package for R and its “forecast” function). In more detail, point and interval forecasts (80% and 95% confidence intervals) are calculated for a forecast horizon of three periods ahead, while being robust against missing values and outliers in the forecast variable. The forecast model employed is selected automatically from a range of 30 different forecast specifications.

All forecasts are based on historical data which is only available until 2019, therefore the COVID-19 pandemic of 2020 cannot be depicted in this forecast, which has to be taken with a grain of salt.

Figure A.50 visualizes the prediction for the three indicators arrivals (=tourist arrivals), overnights (=tourist overnights), and bedspaces (=Number of indivisible units and bedspaces that are available to tourists). The positive trend of the last eight years will not continue. The destination might consider to re-evaluate the existing infrastructure and to further develop specific packages for the next years. The forecasts are based on historical data which means that the COVID-19 effects are not even included. However, the data clearly shows that Brežice suffered heavily after the economic crisis in 2008.

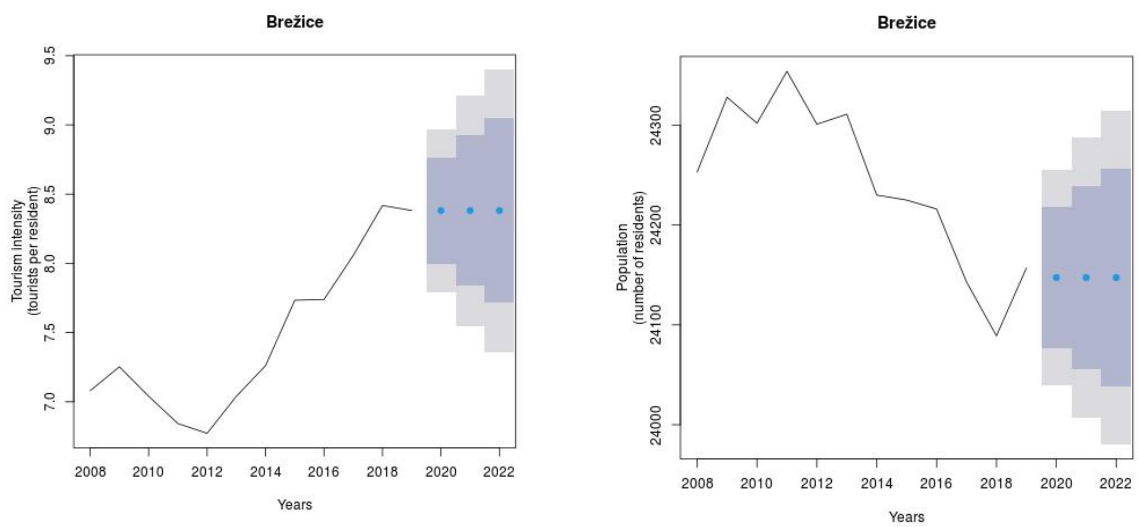
Brežice experienced an increasing pressure of tourism between 2012 and 2018 which led to problems of residents' well-being. This pressure will not continue according to the three years forecast in Figure A.51 (left graph). It is interesting to compare tourism intensity with the development of population over time. Population (absolute number) shows a negative trend between 2012 and 2018 and only recently a slightly positive trend between 2018 and 2019. The three years forecast leads therefore to a stagnate development. A decrease in population as well as an increase in arrivals both increase the pressure of the number of tourists per resident over time.

Figure A.50: Three years forecast for the indicators arrivals, overnights and bedspaces



Source: Consortium 2020

Figure A.51: Three years forecast for the indicator tourism intensity and population



Source: Consortium 2020

II.4 Step 4

II.4.1 Combining tourism and territorial context indicators into tourism impact

Based on desk research five key needs for Brežice have been identified (see Step 1), which were later assessed and confirmed through interviews by three stakeholders: two employees of the entrepreneurship, tourism and the Youth Organization and one SEBLU project leader of a project of the Slovenian Research Agency. Concerning possible pairs of tourism performance and territorial context indicators to be analyzed jointly, the following suggestions can be made to assess needs:

- 1. The need to better manage the impact of tourism on the environment via waste and water management:** Stakeholders perceive a negative impact of tourism due to seasonality especially for the environmental sectors drinking water, wastewater and waste. The Dashboard includes data for waste which can be analysed in combination with the core tourism indicators, like arrivals (growth) AGAINST waste; or overnights AGAINST waste
- 2. The need for an increased cooperation between economic actors:** There are no indicators in the Dashboard.
- 3. The need to counteract the ageing of the society and to attract young people:** Brežice is negatively impacted by its aging population which increases the risk of a negative vicious circle where a lot of young people will further out-migrate which will reduce the economic capacities that would be needed for a more innovative tourism offer. The following indicator pairs will be jointly analysed for the identified negative social sustainability trend: arrival AGAINST ageing; arrivals AGAINST employment AND/OR employment ratio (persons in employment by municipalities of employment)
- 4. The need for improvement of the economic framework conditions and provision of services of general interest for residents and tourists alike:** Due to high unemployment the need for more employment opportunities is identified. Tourism provides new employment opportunities, but many jobs are less paid compared with other industries. The following indicator pairs will be jointly analysed for the identified negative economic sustainability trend: arrivals AGAINST unemployment AND/OR income
- 5. The need for a better mobility management:** There are no indicators in the Dashboard.

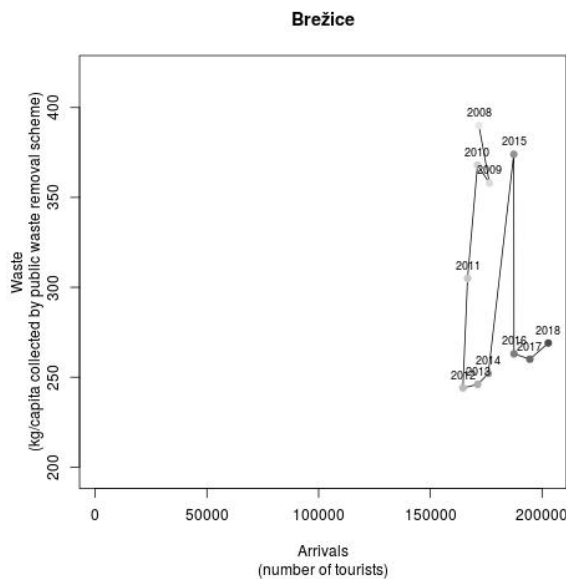
All suggested indicator pairs can be downloaded from the dashboard for each year that is available for the destination (see Table A.22). The indicator pairs are visualized for the available time series and offer a detailed insight about the development of both indicators.

Need to better manage the impact of tourism on the environment via waste and water management

Stakeholders indicated the importance to monitor water quality for the river Save and Krka which is available in ARSO databases and shows a relatively good status over time. However, the data is river-based and therefore not included in the dashboard. Waste management is also mentioned as an important need and therefore analysed as follows. Figure A.52 visualizes the indicator pair arrivals against waste to evaluate the correlation between increase of arrivals especially in the period 2012 – 2018 and the collected waste. The amount of waste is not

dramatically increasing but there is a slight positive trend visible and one major outlier which was discussed at the stakeholder workshop (see step 5)

Figure A.52: Arrivals against waste 2008-2018

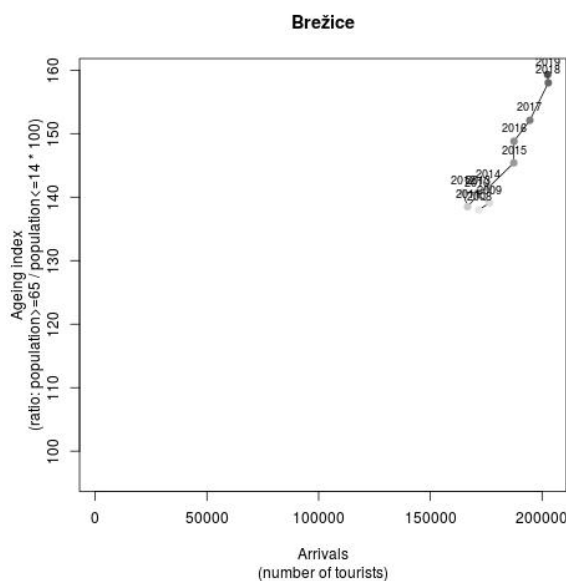


Source: Consortium 2020

The need to counteract the ageing of the society and to attract young people

Brežice is facing a challenge with its demographic situation since many young people are leaving the region and the remaining population is getting older due to structural problems in the region where not many jobs are offered. Figure A.53 shows a clear carrying capacity limit since tourism is growing and at the same time Brežice’s population is rapidly getting older. One of the consequences might be that the destination will not be able to fill tourism jobs which will impact its socioeconomic situation.

Figure A.53: Arrivals against ageing index

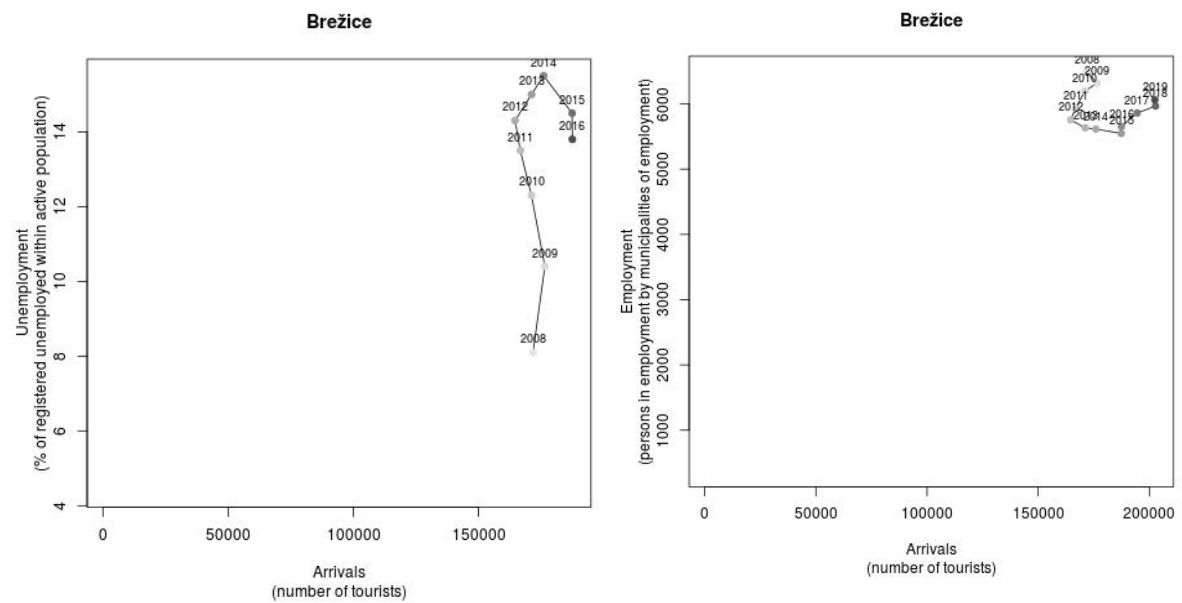


Source: Consortium 2020

The need for improvement of the economic framework conditions and provision of services of general interest for residents and tourists alike

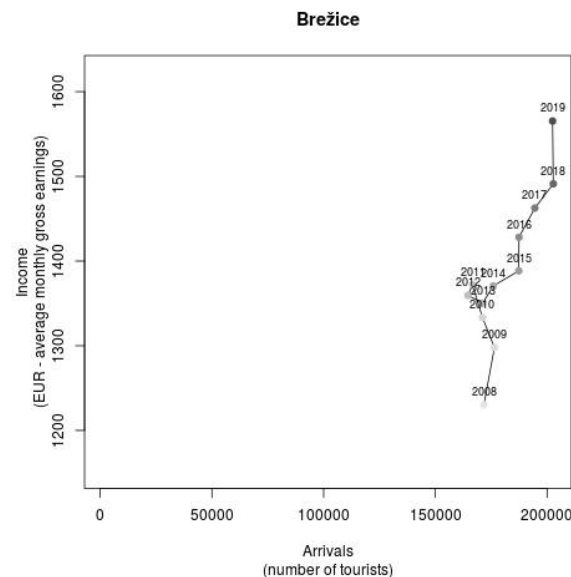
The dashboard covers currently only indicators for the economic framework conditions, for example employment, unemployment, or income. Unemployment can be visualised as one example which also connects to the need to counteract the rapid ageing of the population.

Figure A.54: Arrival against unemployment and arrivals against employment 2008-2018



Source: Consortium 2020

Figure A.55: Arrivals against income



Source: Consortium 2020

Figure A.54 (left graph) visualizes the indicator pair arrivals against unemployment for the period 2008 – 2016 where a steep increase of unemployment from 2008 directly after the economic crisis until 2014 is visible. The right graph shows in comparison employment data which

nicely confirms that Brežice improved its employment situation especially in the years 2015-2019. Brežice obviously managed to offer employment in a period where arrivals increased.

A third socioeconomic indicator is income which is visualized in Figure A.55 and shows an overall positive trend.

II.4.2 Interpreting tourism impact with benchmarking

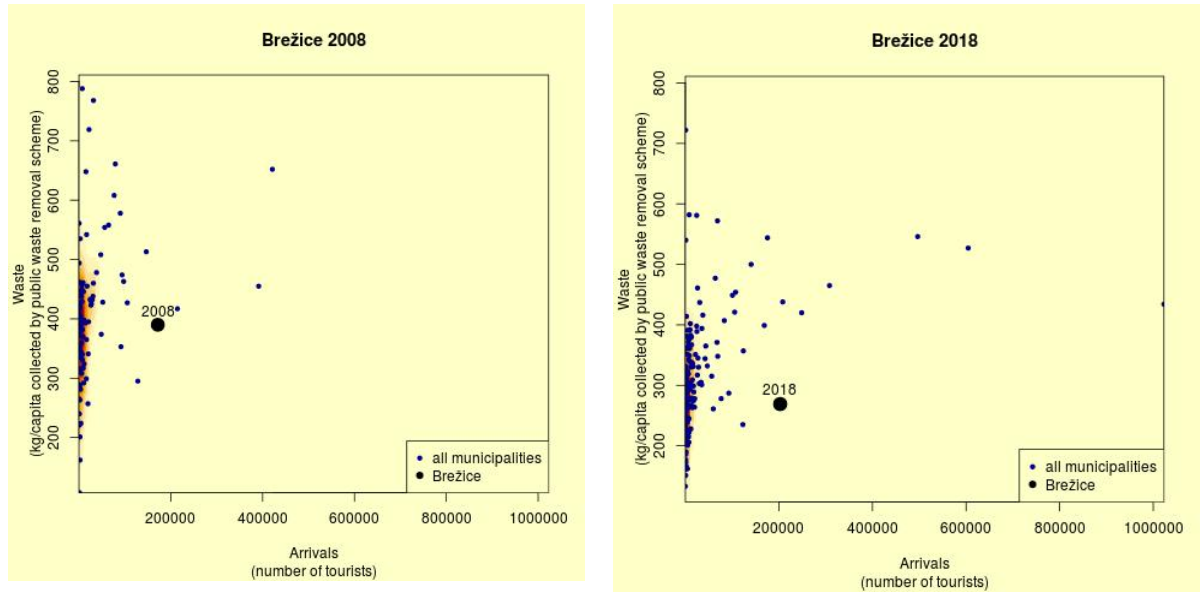
In order to perform benchmarking, the different pairs of tourism performance and territorial context indicators need to be compared to the values from other Slovenian municipalities. In the following, the latest year for which data were available is analysed. Each blue dot in those density graphs represents the combination of the two selected indicators of all municipalities available in the database for the displayed year. The big black dot represents the selected municipality. Red areas highlight dense areas of municipalities, yellow ones are sparsely populated. A municipality located within/outside the red area is similar/different compared to all other municipalities.

Additional insights into tourism impact can be gained by using the “quartile benchmark” option. If this option is selected, the 25%, 50%, and 75% quartiles are determined (out of all municipalities for which data is available for the respective year) and these values are displayed over the years. The darker the grey coloration of the percentage value, the more current its observation. Quartiles are determined by ranking all municipalities according to the selected indicator and determining the threshold that separates the 25% of those municipalities scoring lowest on the selected indicator from the rest, the 50% threshold that cuts the ranked indicator in the middle and in this way splits all municipalities half-half (the so-called median), and the 75% threshold separating the highest scoring 25% from the rest.

Need to better manage the impact of tourism on the environment via waste and water management

The indicator pair waste against arrivals was selected for measuring the impact of tourism on the amount of collected waste. In order to see how Brežice is performing in comparison with all other municipalities in Slovenia the indicator pair is benchmarked. The left graph shows benchmarking data for 2008 and the right for the year 2018. As can be seen there is a clear improvement in the amount of collected waste between 2008 and 2018 and Brežice managed to reduce waste better than many other Slovenian municipalities however there was only a slight increase in arrivals evident within the same period. Altogether there is no carrying capacity risk evident for Brežice.

Figure A.56: Benchmarking for the indicator pair arrivals against waste

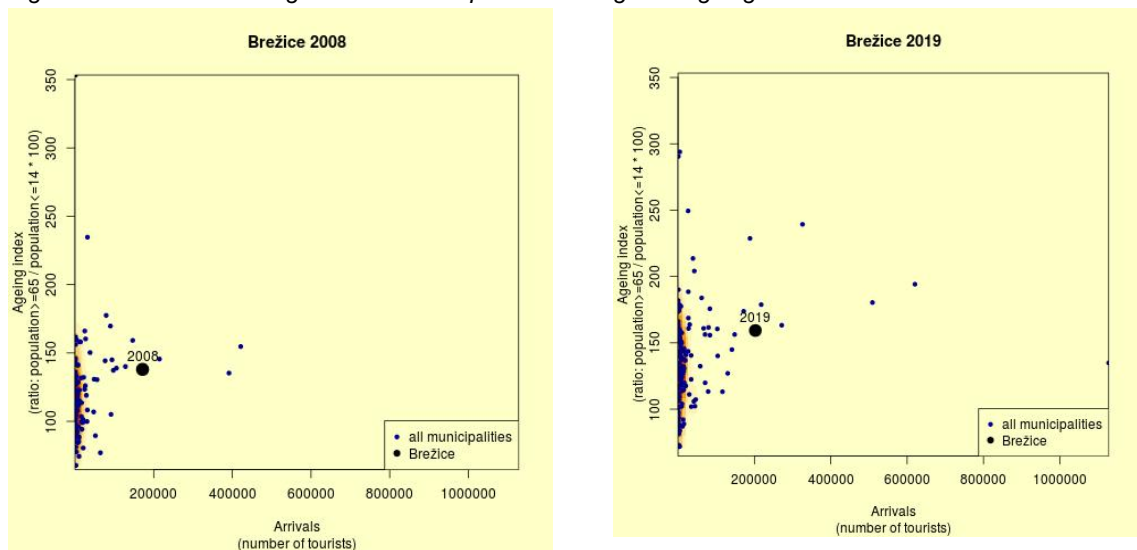


Source: Consortium 2020

Need to counteract the ageing of the society and to attract young people:

The benchmarking visualization for the indicator pair arrivals against ageing index visualized in Figure A.57 shows that Brežice is in terms of ageing more exposed than many other municipalities in Slovenia and the municipality would have to develop counteracting strategies. In the context of the growing tourist numbers depicted with the indicator arrivals Brežice will face challenges in its socioeconomic development and the delivery of services and therefore will lose the chance to counteract the trend of a decreasing population by means of tourist related job opportunities. However, ageing is a phenomenon all over Slovenia and Europe but some regions suffer more under these demographic changes than others.

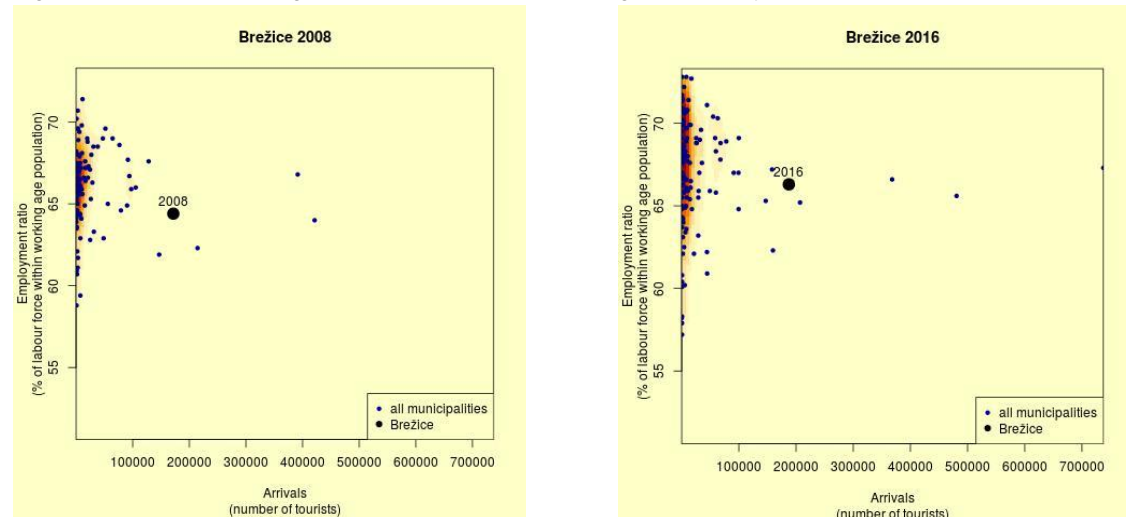
Figure A.57: Benchmarking of the indicator pair arrivals against ageing index



Source: Consortium 2020

A similar picture is visualized for the benchmarking of the indicator pair arrivals against employment ratio (% of labour force within working age population). Brežice is not able to offer more employment due to the growth in tourism.

Figure A.58: Benchmarking of the indicator pair arrivals against employment ratio

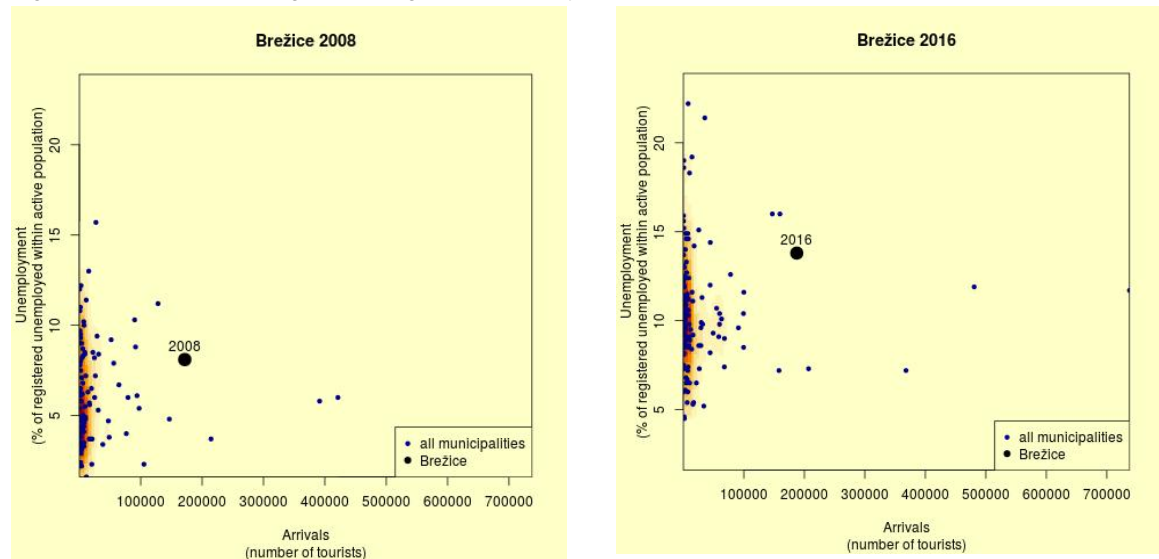


Source: Consortium 2020

Need for improvement of the economic framework conditions and provision of services of general interest for residents and tourists alike

Benchmarking the indicator pairs arrivals against unemployment and against income provides an overview how Brežice copes with challenges of the economic framework conditions compared to all other municipalities. Unemployment seemed to be a major problem for Brežice in the period 2008-2014, therefore a direct comparison of the benchmarks for 2008 and 2016 (the last data point in the database) as visualized in Figure A.59 seems interesting. The left graph for 2008 depicts already the more exposed situation of Brežice, belonging to the municipalities with a substantial share of tourism (depicted with the indicator arrivals) and higher unemployment than many other municipalities. This becomes even more severe in 2016 when Brežice suffered from even more unemployment than most of the Slovenian municipalities.

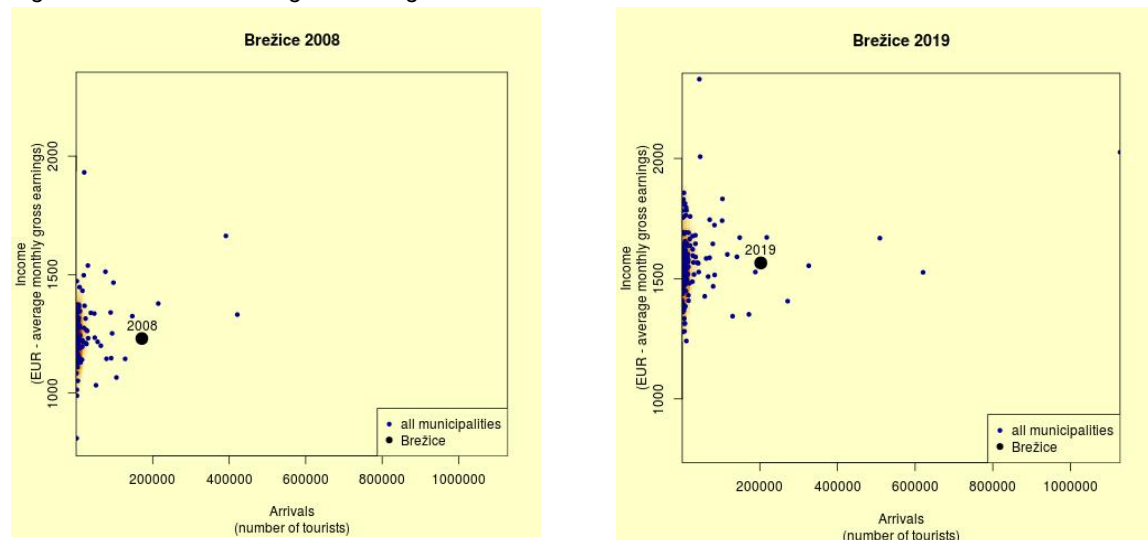
Figure A.59: Benchmarking arrivals against unemployment



Source: Consortium 2020

Finally benchmarking the indicator pairs arrivals and income provides some insight into the broader economic framework conditions and as can be seen in Figure A.60 Slovenia's income level improved over time. Brežice followed the same trend.

Figure A.60: Benchmarking arrivals against income



Source: Consortium 2020

II.5 Step 5

II.5.1 Carrying Capacity Workshop

Table A.23. Overview of workshop participants

Interviewee name	Institution/organisation	Position
Alenka Pogacar	Terme Čatež	Assistant to the Director for Sales and Marketing
Marko Ogorelc	University Maribor	Researcher
Bojana Zevnik	Kommunala Brežice	
Ana Ponikvar	ZPTM Brežice	
Ana Jurečič Martinčič	RRA Posavje	
Sabine Sedlacek	Modul University Vienna	Vice-President
Christian Weismayer	Modul University Vienna	Assistant Professor
Bernd Schuh	ÖIR GmbH	Managing Director
Lyndon Nixon	Modul University Vienna	Assistant Professor

Source: Consortium, 2020

II.6 Outcomes of the Carrying Capacity Workshop

Discussion of the case study specific results

The systemic picture was presented to the participants but only one participant who attended the first workshop participated in the second one and knew the systemic picture. Therefore, the systemic picture was discussed in more detail and the overview mainly addressed the following aspects:

- Tourism is primarily going to the spas, underusing the castle to promote cultural tourism
- Residents aging
- Dependency on EU infrastructure funds (majority of investments)

The discussion was then shifted towards any anticipated changes due to COVID-19 and the following aspects were mentioned:

- Currently the majority of tourists are domestic (there is a marketing focus on Croatia, dependent on the openness of the border)
- Large events are cancelled (they do tend to draw mainly local people)

After the selection of indicators was presented and stakeholders have been made aware that not all indicators from their wish list are included in the dashboard, the results for Brežice were presented. The presentation focused on the selection of indicators which was perceived as very helpful since the stakeholders were not included in Step 1 and 2. The observation of an absence of a strong seasonality in incoming tourism was discussed in a lengthier manner mainly by the representative of Terme Čatež since incoming tourism is dominated by the spa which balances well visitor numbers since business conferences or sports teams fill weaker periods of wellness tourism.

The carrying capacity analysis was based on the five identified needs. However, only indicators tackling three needs were covered in the dashboard. The overview of indicator combinations was perceived as helpful and stakeholders started already a reflection process in the discussion part. The main tenor was that stakeholders of the municipality Brežice and stakeholders in the

Terme Čatež should more closely work together and develop common strategies. Stakeholders came to the conclusion that the workshop was very helpful especially because of this dialogue.

Discussion about the implications of results

Forum 1: Setting the frame (poster session/mindmapping)

Forum 1 aimed at setting the frame and was structured along the needs. It had been decided to address all five needs in Forum 1 even though only three had been addressed in the data based carrying capacity analysis. Stakeholders were invited to bring in their experiences with the existing activities.

- **Need to better manage the impact of tourism on the environment via waste and water management**

The common tenor of the discussion was that awareness raising is top on all stakeholders' agenda and the participants discussed that Terme Čatež is following environmental best practices but the tourists are still the problem (esp. larger groups from abroad may lack the same cultural sensitivity). The spa is dealing with 20% group tourism and the outlier in the data in 2015 might have resulted of a specific international tourism tender where tourists from a completely different cultural background visited all the hotels in Terme Čatež. Overall tourists are much more behaved than this specific composition of tourists in 2015. The discussion touched also upon food waste and the problem in Slovenia that the food and beverage industry cannot donate leftover food due to strict laws. Another aspect discussed recurrent tourists which come from year to year with the same mindset which is hard to change.

- **The need for an increased cooperation between economic actors**

Stakeholders discussed to create specific tourism offers which should involve packages where different economic actors would have a chance to contribute (intersectoral approaches):

- Promotion of regional culture, gastronomy
- Lack of an integrating force (sort of umbrella tourism promotion agency)
- Cost of "boutique" offers too high for mass tourism venue like the spas, which limits the promotion of regional products

The importance of public and private sector collaboration was discussed in more detail since there seems to be the notion that the private sector does not trust in public sector's willingness to move forward and be willing to change processes. Stakeholders would like to see a better balance between public and private decision making which falls under the domain of new governance structures with clearly defined power divisions and specific roles of the different governance actors (i.e. classical governance indicators). Altogether there was consensus that there is a need for a facilitator with a moderating function (institution) in order to build up trust, initiate activities and to make them alive. The participating stakeholders clearly identified a potential for such a function.

Stakeholders mentioned weekly meetings which are in place between different municipalities and tourism related actors in the region to emphasize the importance of the broader region. It

seems that each destination is focussing on the local level without identifying potentials for a broader regional cooperation.

- **The need to counteract the ageing of the society and to attract young people**

The region and the destination more specifically suffer under out-migration (domestic) since the younger generation lacks employment opportunities as a consequence of the weak economy which functions as a push factor especially to Ljubljana. Even start-up opportunities are weak and young people in the region do not have a solid personal economic basis which makes it hard if no regional and/or national supporting mechanisms are in place. There is also no risk capital available in the region which can be seen as an obstacle for entrepreneurial activities. In addition, a lot of bureaucratic barriers prevent more innovative activities for making the region/municipality more attractive for young people, e.g. specific activities at the river etc.

The question if local employers would be willing to hire and support young local people was discussed under the lead of the representative of Terme Čatež who made clear that the salary level in tourism is far too low and that working conditions like for instance long working hours and weekend working hours are not very attractive for young people and young families.

- **The need for improvement of the economic framework conditions and provision of services of general interest for residents and tourists alike**

The discussion started with a question targeted at the stakeholders since the need includes provision of services of general interest and tourists alike which did not seem to be clear. Stakeholders confirmed that there is only one service not available and reported about a lack of health services in high season times for emergency cases.

- **The need for a better mobility management**

Mobility seems to be a perceived challenge especially since Terme Čatež is disconnected from the municipality centre and there is only a bus connection available. There are some projects focusing on bicycle (and hiking) rentals, paths and trails which would need to be expanded and be integrated into the destination development. One challenge is that tourists come by car to Terme Čatež and there are enough parking lots but it would be great to bring tourists more into the centre. Terme Čatež offers e-bikes and bikes but a more general city bike system with a rental system which is not too complicated would be one of the projects for the future.

Forum 2: Discussion of potential actions per destination

In forum 2 stakeholders were asked to go back to each discussed need and to commonly identify what can be done to initiate change and to help the destination to meet the needs.

- **Need to better manage the impact of tourism on the environment via waste and water management**

Stakeholders discussed certain educational measures that could be developed collectively, e.g. brochures. In addition, welcome videos were mentioned where all different attractions in the destination would be introduced. One specific activity mentioned were tailored workshops for

children at Terme Čatež and the goal of such an initiative would be to help to change tourists' mind set but there was common sense that there is the need to get the willingness of the hotel sector and there was also common sense that there is a need to change the industries mind set.

- **The need for an increased cooperation between economic actors**

This includes new activities aiming at awareness raising on the side of different economic entities including public sector initiatives which would show the private sector how they could benefit from initiatives in the city. This is related to the lack of trust between private and public sector.

There was also an understanding to use limitations of COVID-19 of indoor pools in Terme Čatež to develop alternative packages together with the municipalities, i.e. alternative activities which would present other attractions to thermal tourists.

The lack of communication could be overcome by building up a network of actors who take care to develop common interest and to develop common strategies.

- **The need to counteract the ageing of the society and to attract young people**

There is a skill raising initiative starting in fall which is education based (municipal and national initiative). In the future the use of incubator initiatives at the national level could help to overcome the lack of specific support for young people.

- **The need for a better mobility management**

Future projects could focus on building up shuttle busses from train stations to bring tourists in a more environmental manner into the destination. For those tourists still coming by car a specific infrastructure provision would be needed including particular paths and corridors. For all activities related to the biking infrastructure digitalization would help to provide more information, e.g. maps are already in the production.

Besides the needs discussion stakeholders were invited to assess the situation of Brežice in terms of its visibility within the region and the value of a more regional destination branding for the Posavje region.

Table A.24 provides an overview of the discussion in Forum 1 (left column) and Forum 2 (right column).

Table A.24: Overview of the discussion in Forum 1 and 2

(1) Need to better manage the impact of tourism on the environment via waste and water management	What can be done?
<p>Awareness is seen as the key for need 1</p> <p>The destination is shaped by group tourism of specific groups (there is 20% only based on group tourism).</p> <p>The outlier in the data in 2015 might have resulted of a specific international tourism tender where tourists from a completely different cultural background visited all the hotels in Terme Čatež not perceived to be a tourism induced problem.</p>	<p>Improving education, e.g. the provision of brochures</p> <p>Producing welcome videos</p> <p>Tailored workshops for children at Terme Čatež</p> <p>Initiatives that might help to change tourists' mind set</p> <p>An additional need: willingness of hotel sector → change their mind sets</p>

(2) The need for an increased cooperation between economic actors:	What can be done?
<p>Creating specific tourism offers is seen as a necessity, e.g. offering packages (intersectoral)</p> <p>Need for public & private sector collaboration, since the private sector does not have trust in public sector's willingness to change.</p> <p>Overall there is a lack of a balanced public & private decision making (governance) which refers to power and the role of actors (= classical governance indicators).</p> <p>A facilitator with a moderating function (institution) is needed in order to build up trust and to initiate activities and to make them alive but there is no idea how to set it up.</p> <p>There is the potential for using regional products but there are price issues involved for the Terme Čatež hotels which cannot afford it.</p> <p>Need for a common understanding of medium and long-term projects</p> <p>Differentiation between regional and local interests</p>	<p>Awareness raising on the side of different economic entities</p> <p>Public sector initiatives which would show private sector how they would benefit from initiatives in the city</p> <p>Integrate the multipliers</p> <p>Use limitations of COVID of indoor pools in Terme Čatež to develop alternative packages together</p> <p>Build up a network of actors who take care to develop common interest</p>
(3) The need to counteract the ageing of the society and to attract young people	What can be done?
<p>Out-migration (domestic) is seen as a major challenge due to the weak economy (→ less employment opportunities (push factor))</p> <p>Start-up opportunities are weak (weak personal economic basis)</p> <p>Bureaucratic barriers that prevent more innovative activities, e.g. at the river</p> <p>Low salary level in the tourism industry</p> <p>Lack of risk capital</p>	<p>There is a project starting in fall – an education based (municipal and national initiative) skill raising initiative.</p> <p>Use incubator initiatives from the national level</p>
(4) The need for improvement of the economic framework conditions and provision of services of general interest for residents and tourists alike	What can be done?
<p>Health services in high season times (only for emergency cases) are needed</p>	
(5) The need for a better mobility management	What can be done?
<p>A better traffic connection between Terme Čatež and the center. There are busses running but this could be improved.</p> <p>Lack of bicycle (& hiking) paths & trails</p> <p>Tourists come by car to Terme Čatež → enough parking lots</p> <p>Terme Čatež offers e-bikes & bikes</p> <p>City bikes are available but the rental system is too complicated (sign-up process is too long etc.).</p>	<p>→ build up shuttle busses from train stations</p> <p>→ infrastructure provision: paths & corridors</p> <p>digitalization → maps (is already on its way)</p>

II.6.1 Formulation of policy recommendations

The policy recommendations are based step 1-5 in the methodology and have to be seen as the overarching product of the methodology.

The case study process for Brežice can be concluded as a divided process where different stakeholders were included at different stages in the project which turned out at the end as beneficial since the key-stakeholder of Terme Čatež was very active in the second workshop and addressed quite a lot of issues which are of major importance for the whole destination. One major conclusion is that stakeholder communication needs to be improved in the future and a lot more cooperation is needed between the different stakeholders.

The analyses in steps 3 and 4 followed the identified needs and confirmed some of the barriers that prevent Brežice of becoming a more balanced tourism destination. The destination so far benefits from the thermal bath and the very professional specific tourist segment but lacks a clear profile besides this spa tourism. The municipality of Brežice with the Castle offers quite more than spa tourism but does not manage to benefit from the pool of tourists coming regularly to Terme Čatež.

The main conclusion for the destination Brežice is that a better destination management is needed which could promote the whole Posavje region to reach a critical mass. In order to reach this level the stakeholders within the destination Brežice would need to start a regular dialogue ideally accompanied by a facilitator. This leads to the following policy recommendation:

To create a facilitator role with a moderating function (institution) to build up trust and to initiate activities and to make them alive.

Another conclusion from the workshop discussions is that Brežice suffers a lot from out-migration which in turn weakens the destination's economic basis. The data in the dashboard nicely confirmed the ageing process of the population which leads to substantial structural problems. The workshop confirmed these structural problems. After lengthy discussions the following policy recommendation can be formulated:

Tailor-made contest where young people in the region can contribute to the development of the destination would open windows of opportunities for innovative and creative ideas for broadening the scope of tourism in Brežice.

Since the stakeholder workshop brought a clear lack of communication between the stakeholders to the attention of the participants and the discussions within this short period of time designated to the second workshop showed all participants how valuable information exchange and communication is for the development of the municipality, a policy recommendation targeting at improving the governance mechanisms needs to be formulated:

In order to balance public and private decision making, efficient governance mechanisms need to be build up which would help to define power relations and particular roles of single actors. This would help to define one common strategy and to see a benefit of having a strong tourism basis in the Terme Čatež and a great potential for cultural tourism with the Castle in Brežice at the same time.

III Case study Divača

III.1 Step 1

III.1.1 Overall context

Destination definition

Consulting the main tourism authorities from Divača (Interviewee 1, Divača, 27.2.2020) and supported with the field analyses of relevant strategic documents and networks, tourist destination Divača can only be defined as Divača municipality. Currently, the only tourism socio-political and organisational structure for Divača tourist destination is municipality's Divača Development Centre, responsible for tourism. The Green Scheme of Slovenian Tourism (GSST) by the Slovenian National Tourism Board (STB) that provides a sustainable tourism development framework, also defines Divača municipality as a tourist destination. Future destination vision is broader in geographical terms and refer to construction of a broader destination territory and association of more municipalities. Some attempts have already been made. For example, one attempt to join destination Karst is currently in the process, awaiting final legal steps by municipalities to be taken (for more see point 1.1.3. "Policy and Strategic Orientation").

Destination location

Divača municipality is a NUTS 3 region region Obalno-Kraška located in the area of Karst, where the flysch Brkini Hills meet the Karst's limestone area. The magnificent Škocjan Caves, which are on the UNESCO World Heritage List, were formed in this area (Green Collection, n.d.). In terms of global geographical context, the municipality Divača is part of the Sea – Karst (Obalno-kraška) statistical region. It measures 145 km² and ranks 45th in terms of size among Slovene municipalities. The distance to the capital of Ljubljana is 59 km to the East. Towards South-West, the distance to the Adriatic coast (Koper) is 24 kms and to the sea destination Portorož is located 46 km away. Distance to the main Slovenian airport, Brniki, is 72 km. Trieste airport is only 54 km away while the distance to Venice airport is 200 km. The highroad Ljubljana – Koper used to be the main transit route for automobile passenger from Europe towards the Adriatic. Railway connections are poor and slow, public buses are not frequent.

Figure A.61: Divača destination map from municipality Figure A.62: Divača destination map from GSST



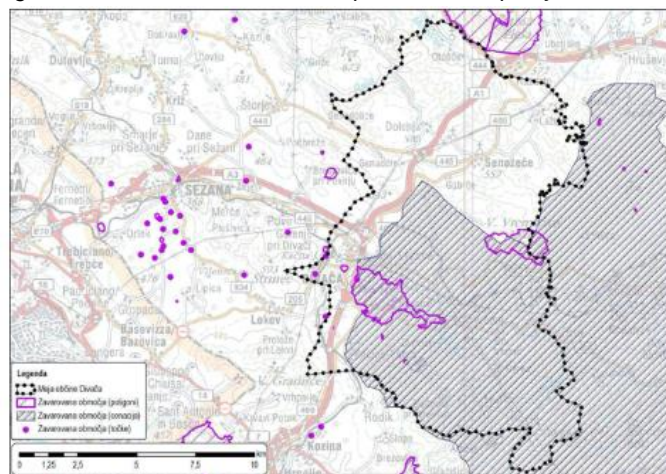
Source: Municipality of Divača, n.d.



GSST – Green Scheme of Slov. Tourism
Source: Municipality of Divača (n.d.)

Divača is partly located in the protected area of Škocjan Caves Regional Park. The Škocjan Caves and their surroundings entered the UNESCO's list of natural and cultural world heritage sites in 1986. In 1999, the Caves joined the Ramsar Directory of Wetlands of International Importance and in 2004. The Škocjan Caves Park was included in the world network of biosphere reserves called MAB – "Man and the Biosphere" an initiative of UNESCO. The Škocjan Caves are a prominent characteristic of the Karst area and are considered to be one of the natural treasures of our planet. It is necessary to preserve this area of global importance and world heritage.

Figure A.63: Protected areas and points, municipality of Divača



Source: Municipality of Divača, n.d.

Socio-economic data for the municipality, region and Slovenia

According to national statistics data (SORS, n.d.,c). Divača has a population of about 4,093 (about 2,141 men and 1,952 women). Data on population rank Divača 128th among Slovene municipalities. The population density is 28 people per square kilometer, compared to national average 102 people per square kilometer. Municipality's area is 145 square kilometers (Table A.25 and Table A.26).

The Obalno-kraška region, which also involves other touristic destinations such as Ankaran, Izola, Koper and Piran, stood out with the highest share of foreign nationals in total population (10.5%). It also has the highest number of people who immigrated from abroad (19 per 1,000 population). GDP per capita was the second highest in the country (EUR 22,627) behind the Osrednjeslovenska statistical region. The region also generates the highest amount of municipal waste per capita, namely 575 kg (80 kg more than average in Slovenia). 62% of municipal waste was collected separately, which was the second lowest share among regions.

Table A.25: Data for Divača, Obalno-kraška region and Slovenia, 2018

Data	Municipality	Obalno-kraška region	Slovenia
Area km ²	145	1,044	20,273
Population	4,093	114,085	2,070,050
Number of persons in paid employment	855	41,479	780,203

Data	Municipality	Obalno-kraška region	Slovenia
Average monthly net earnings per person (EUR)	1,001.75	1,064.94	1,092.74
Turnover of enterprises (EUR 1,000)	90,766	6,229,948	117,040,613
Men	2,141	56,558	1,030,234
Women	1,952	57,527	1,039,816
Natural increase	0	-152	-900
Total increase	73	1,060	14,028
Number of kindergartens	2	55	968
Number of children in kindergartens	183	4,512	87,147
Number of elementary school pupils	355	9,536	184,101
Number of secondary school pupils (by residence)	108	3,392	73,110
Number of students (by residence)	112	3,259	75,991
Number of persons in employment (by residence)	1,839	48,754	872,772
Number of self-employed persons	201	4,418	92,569
Employment rate (%)	67.1	65.5	64.5
Average monthly gross earnings per person in paid employment (EUR)	1,507.38	1,637.61	1,681.55
Number of enterprises	350	14,295	200,174
Number of dwellings, Dwelling Stock	1,927	55,266	852,181
Number of passenger cars	2,624	67,336	1,143,150
Municipal waste collected (ton)	1,124	50,255	747,535
Regional gross domestic product (EUR mio.)	-	2,584	45,755

Source: SORS, n.d., c

Divača's population density is far below the national or regional average (28 compared to 109 and 102 people per km² in the region and Slovenia). Also the average monthly gross earning index and employment are some percentage points below the regional and national numbers. (see Table A.26 for more indicators).

Table A.26: Indicators for Divača, Obalno-kraška region and Slovenia 2016

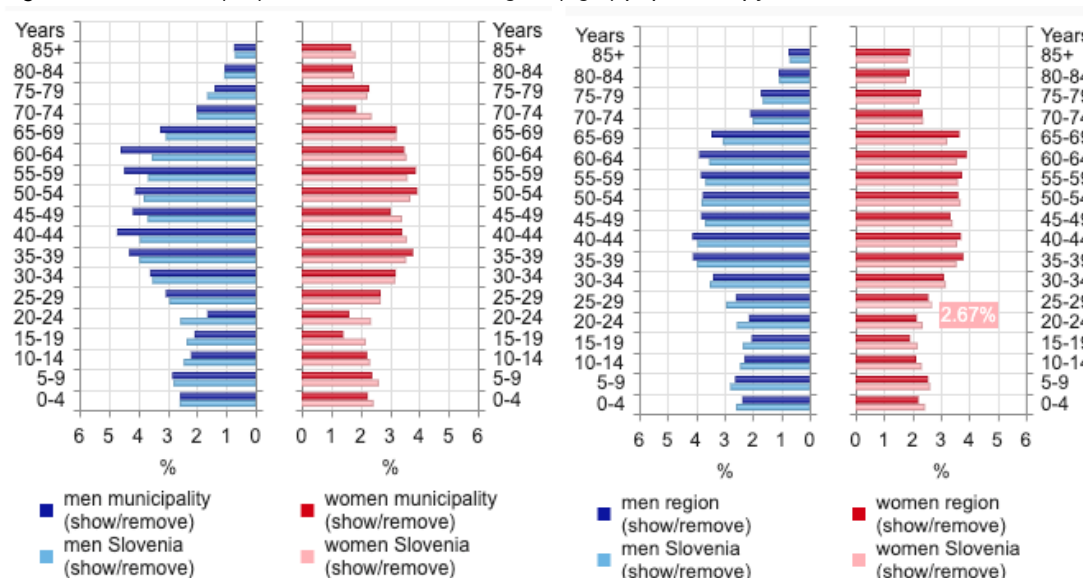
Indicators	Municipality	Obalno-kraška region	Slovenia
Density of population (per km ²)	28	109	102
Total increase (per 1,000 population)	9.5	8.6	9.5
Mean age (years) – 1 July	44.2	44.6	43.3
Employment rate (%)	67.1	65.5	64.5
Average age of passenger cars (years)	11.1	10.5	10.1
Live births (per 1,000 population)	9.5	8.6	9.5
Deaths (per 1,000 population)	9.5	10	9.9
Natural increase (per 1,000 population)	0	-1.3	-0.4
Net migration (per 1,000 population)*	9	-	1
Ageing index	132.6	149	131
Children in kindergartens (as % of all children aged 1-5)	73	80	8/
Number of students (per 1,000 population)	27	28	37
Number of tertiary graduates (per 1,000 population)	7	6	8
Average monthly gross earnings (index, SI=100)	89.6	97.4	100
Average monthly net earnings (index, SI=100)	91.7	97.5	100

Indicators	Municipality	Obalno-kraška region	Slovenia
Employment rate (%)	67.1	65.5	64.5
Number of dwellings, Dwelling Stock (per 1,000 population)	472	485	412
Number of passenger cars (per 100 inhabitants) – 31 December	63	59	55
Municipal waste collected by public waste removal scheme (kg/person)	275	441	361
Regional gross domestic product per capita (EUR, current rate)	-	22,627	22,083

Source: SORS, n.d., c

As in most Slovene municipalities, in Divača the old – young people ratio is above 100. More specifically, there are 132 people aged 65 or more, per 100 people aged 0–14. The mean age of people in Divača is lower than in the region, difference is 0.4 percentage points (Figure A.64).

Figure A.64: Divača (left) and Obalno-kraška region (right) population pyramid, 2018



Source: SORS, n.d., c

Tourism data

The latest data on tourism in Divača shows 15,836 tourist total arrivals and 26,339 overnight stays (Table A.27). The average length of stay is 1.66 days per visitor. There are 6.6 overnight stays per inhabitant. Tourism density in terms of overnights per square kilometre is 182.

Table A.27: Tourist arrivals and nights spent in Divača, 2017 and 2018

	Tourist arrivals 2018	Overnight stays 2018	Tourist arrivals 2017	Overnight stays 2017
Total	15,836	26,339	12,915	19,125
Domestic	1,405	2,571	999	1564
Foreign	14,431	23,768	11,916	17,561

Source: SORS, 2020

Divača is a small municipality in the Karst region of Slovenia, with around 4,000 inhabitants and only 26 thousands of overnight stays, 378 tourist beds (SORS, n.d., data 2017; 121 beds in

hotels, 100 beds in camps and 157 beds in other types of accommodation) and with a UNESCO site Škocjan caves with around 200,000 visits annually (Škocjan caves, 2020). Other tourist attractions are of a small scale; they include Divača caves and Museum of actors, other natural and cultural attractions. Divača as a tourist destination is outside the main tourist flows in the region. In terms of scale, Škocjan caves are exception and also have the highest tourism potential in the destination and in the Karst region.

The municipality of Divača is as a local authority has rather low capacities in terms of finance and human resources. It has eight employees, the mayor and the director of the municipality. There is one senior advisor employed in the field of “economy, agriculture and tourism”. Also relevant to tourism is the area of work “environment, space and spatial planning”, as well as the area of “development and application for EU calls”, which are in the responsibility of the other two advisers.

Still emerging tourist destination, Divača has a strong tourism civil sector. There are six tourism related associations: TKŠD Urbanščica, TD Škocijan, Razvojno društvo Bandera, Razvojno društvo Lipa, Laže, TD Kraški Turist, Divača, TKŠD ME Jame, Dane pri Divači. Some civil organisations strongly participate in tourism development, event management and provide a link between tourism and interested residents.

III.1.2 Needs assessment

Interviews and analysis of the destination’s tourism, carrying capacity, as well as overall socio-economic development shows the following key needs (challenges, threats, problems, as well as strengths and opportunities) that are relevant for the scope of the project.

The need to progress towards sustainability and life quality

According to Development report 2018 (IMAD, n.d.) Slovenian municipalities are moving towards an inclusive society and have also reduced pressures on the environment. In some areas, development deviates from the sustainable development principles and poses a risk to the achievement of the sustainable development central objective. In order to achieve sustainability, more responsible development strategy is needed, including balancing economic, social and environmental sustainability. These improvements are also expected to impact economic development and competitiveness, as well as living standards and wellbeing of the population (e.g. life quality of residents). The challenges identified in the report, which refer to Slovenia but are also valid for Divača, are relatively low productivity growth and slow adjustment to demographic changes as well as high labour market segmentation of young people and low economic and social inclusion of older people. Environmental sustainability is challenged by high greenhouse gas (GHG) emissions and waste management which is a considerable challenge in Divača, and in the entire region.

The need to connect tourism development in Divača with its hot spot Škocjan Caves

In terms of presence of tourists and its economic benefits, Divača experiences a rather small impact (apart from visitation to Škocjanske Caves). The new Strategy for Sustainable Growth

of Slovenian Tourism for 2017-2020 (MGRTRS, 2017) has diagnosed tourism in general and in some destinations as being too small-scale (in absolute and relative terms). Tourism in such destinations is less competitive than other destinations in the region and abroad. This applied to Divača, where the tourism intensity is 6.6 overnight stays per inhabitant, much lower than other municipalities in the region. For comparison, Sežana's tourism intensity is 7.5 and Anakaran's or Piran's above 100 (SORS, n.d.).

The data and, as well as interviews, clearly indicate that Divača does not need planning models with regards to over-capacity. Addressing this issue is a strategic need with regards to carrying capacity. In order to sustainably increase tourist numbers, action on tourism infrastructure, superstructure (attractions and accommodation), as well as tourism product development and quality and prices should be undertaken. The opportunities for Divača arise from its resources and vicinity of tourism flows. Divača as a tourist destination lies on the strong tourist flows route towards the Adriatic. Yet, it receives only 26,300 overnight stays per year, majority by foreign tourists. The absolute number is low, however, the receiving tourist capacities of Divača are also low, due to low numbers of accommodation on offer and low number of commercial tourist attractions.

However, the situation is very different in Škocjan caves, located on the ground of Divača community. Škocjan caves manages its visitation capacities. In 2019, a system in place, which limits the number of people visiting the cave at one time (from 300 to 130) and enables visitors to make an on-line reservation of the time slot. Until 2019 there were only two entrances a day, with two to three hours waiting time in high season. However, as of autumn 2019, visits are scheduled every half an hour. The caves are based on the underground river Reka and play an important role in improving the quality of river Reka and waste disposal rehabilitation in the area. For this reason, responsible management of the park is of utmost importance. Škocjan caves have been already working on carrying capacity calculations for years. Nevertheless, according to the interviews, there is little interest in exploring the natural site's carrying capacity a framework of regional destination Karst, where Divača is partner.

In total, the destination is underdeveloped in terms of tourism infrastructure and tourism supply, and still struggles with basic public infrastructure. They strive for visitors who would stay longer in the destination but do not have adequate offer and infrastructure. Lack of cooperation with the nearby Škocjan caves is also a factor in the under-exploitation of touristic capacities in Divača. The destination needs model, that would help them to take steps towards more efficient visitor flows and destination management. There is an awareness that increasing tourism capacity must be followed and carefully planned from the beginning of tourism development. The interviewees mentioned that learning from relevant best-case studies would be very welcome and efficient. At the same time, the human resources of municipality are very limited. Here, again, connecting and exploring synergies with Škocjan caves could help Divača to attract some tourists and act as a surrounding to the attraction even with limited capacities of local authorities.

The need to address the destination management functions and organisation

In order to attract more visitors, Divača needs to partner more strongly not only with Škocjan Caves but also with different surrounding municipalities. The municipality resources for destination management, including human resources and finance, are very limited. Joining forces with neighbouring destinations and Škocjan Caves can unlock the spill-overs from its presence near tourist destinations. As described in the next section, many such initiatives are already ongoing. Their de-facto implementation is a necessary step.

The need to address the environmental quality and pollution

The destination faces environmental threats stemming from pollution. Interviewers point out that there is a number of same-day visitors from Italy who visit Karst for lunch and dispose their domestic waste in the Karst natural environment (possibly due to the fact that waste disposal prices in Italy are high). The disposals of waste in the past has been affecting the River Reka (a subject of monitoring by UNESCO) and action to clean the environment is already in progress, strongly supported by Park Škocjan Caves.

The negative tourism impacts highlighted by the local authorities (Občina Divača, n.d.) are: noise from visitors which causes disturbance to animals, performing recreational, sports, cultural or other activities, leaving dogs or other pets off the leash, presence in the reserve at a time when animals need peace, damage to plants, the construction and maintenance of facilities causing noise and pollution, the negative effects of the road use on the nature reserve. The document recognises that tourism and its implications such as noise, lighting, physical damage can pose a threat to biodiversity. The Karst landscape, and especially its parts such as dry walls, borders, meadows, mounds are attractive to visitors. However, at the same time, they require preservation as they are important elements of the biodiversity

Carrying capacity needs summary

The results provided above are based on the desk research and interviews with Divača stakeholders. It is evident that the destination needs to define the strategy of increasing tourism capacity by using the synergies with nearby attractions. Data on Divača destination tourism, such as available capacities, number of beds or number of attractions shows small scale of tourism capacities. The high visitation numbers of the main spot attraction do not bring sufficient tourism benefits to the wider destination, including Divača. Moreover, regular financial benefits to the community are practically non-existent, due to legal status of Park Skocjanske cave. Stronger vision and cooperation of all relevant stakeholders is needed in order to ensure governance towards tourism development despite limited capacities of the municipality. At the same time, as an emerging destination, it is necessary to reflect on the optimum numbers of tourists given the available infrastructure, superstructure. This vision and strategy should be developed commonly with residents who would be directly affected by increased tourism. Residents should be willing to accept presence of tourists as well as support necessary measures such as development of tourism infrastructure.

Better organisation of destination management, in order to take over the management, governance and leadership role in the field of tourism development, is needed. Rethinking of the destination in a wider geographical perspective and joining the broader destination management is already planned and can be expected to lead to a stronger position on the tourism market for the entire area.

The low visitation size importance is gaining even stronger momentum in the COVID-19 and new challenges related to the pandemic will need to be addressed in the light of the present strategy.

III.1.3 Policy and strategic orientation

Overview of relevant policy and strategic documents

Most relevant strategic documents defining strategic and policy orientation with regards to tourism and wider socio-economic framework in the destination (at local, regional and national level) are the following:

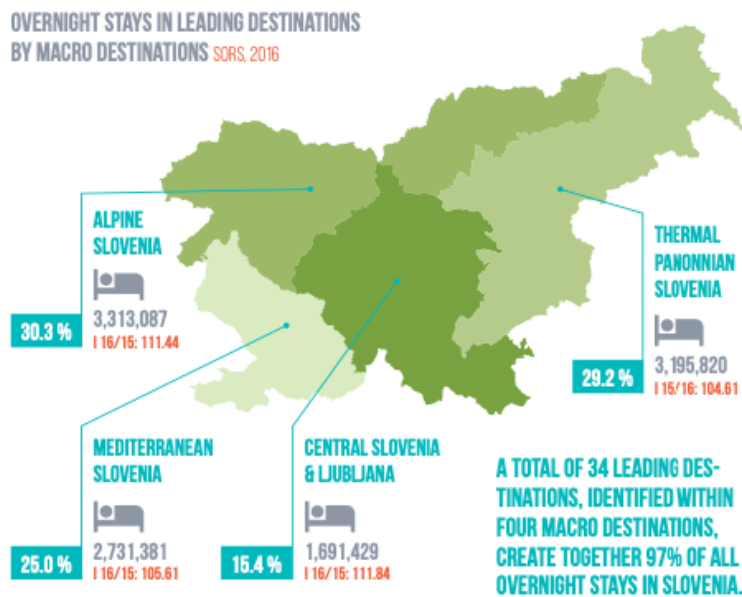
- Analysis of strategic tourism flows for destination Karst with development and marketing plan for Kras for 2019-2024
- IMAD (n.d.) Development report 2018
- Strategy for Sustainable Growth of Slovenian Tourism for 2017-2020
- Environmental report for Divača municipality

Analysis of relevant policy and strategic documents and information from interviews

In order to analyse policy and strategic orientation of Divača, the relevant strategic documents have been studied at regional and national level. In addition, relevant official data on the web pages from STB, MGRTRS and Park Skočjan Cave have been surveyed; and interviews with destination's relevant stakeholders have been conducted. The analysis shows that the policy and strategic orientation for tourism in Divača is a subject of different organisational structure, schemes and network that partially support destination governance and management. We have identified six different such alliances; each positions Divača as a different tourist destination, in different partnerships with neighbouring municipalities. Their relevance for policy and strategic orientation are presented below.

First, policy and strategy framework for Slovenian tourist destinations is determined by the national Strategy for Sustainable Growth of Slovenian Tourism for 2017-2020 (MGRTRS, 2017). The strategy suggests four tourism macro regions which are already operational and are coordinated by the respective bodies (see the figure below). Macro regions are based on geographical units, the similarity of the tourism products, and potential visibility on tourism market. In order to make a meaningful brand for tourism market, the geographical name "Mediterranean & Karst Slovenia" has been chosen for the region where Divaca is located.

Figure A.65: Mediterranean & Karst macro tourism region of Slovenia⁶



Source: MGRTRS, 2017, STB, n.d.

As already presented, Slovenian macro tourist destination scheme is based on leading tourist destinations that belong to certain area with similar tourism potential and products. In this scheme “Lipica and the Škocjan Caves” present one of the leading destinations (with Portorož, Izola, Koper, Ankaran, Postojna Cave (Postojna), Nova Gorica, the Vipava Valley and Brda). Leading destinations are defined as important subjects of Slovenian tourism at the level of local destination and define the macro destination in terms of tourism offer.

25% of total overnight stays belong to Mediterranean & Karst macro destination, mainly on the account of coastal destinations. Divača municipality is not a sea destination and its share in Mediterranean overnight stays is only 1% of total macro destination overnights. The strategic products, promoted by national body coordinating the scheme, in the macro region are business meetings and events, sun and sea tourism, health, well-being and gastronomy. The last two categories are of special interest and potential for Divača. Strategic orientation in development on an all year-round products focuses on wellness, relaxation, selfless and mindfulness programmes. Health themes such as preventive therapies using natural therapeutic elements combined with the Mediterranean climate and speleotherapy (a therapy based on cave visits) can be particularly relevant in Divača.

Second destination governance and management structure, relevant for destination’s policy and strategy, is a Green Scheme of Slovenian Tourism (GSST). In line with the mentioned national tourism strategy, GSST offers a green policy and strategy framework for member destinations, and tourism indicators for sustainable governance. Divača holds the bronze Slovenia Green label, indicating the destination’s compliance with requirements defined by the GSST

⁶ The full name for Mediterranean Slovenia is “Mediterranean & Karst Slovenia”.

(STB, 2019). With Green Scheme participation Divača, interviewees agree that the destination is committed to sustainable tourism development and local resource-based tourism model. Divača also committed to green policy of Slovene tourism and to considering the satisfaction of all main stakeholder groups: tourism industry, visitors and local residents. In addition, destination promotes green certification for local providers (EU eco label, EMAS, Green Key, Green Globe, Bio Hotels, Travelife).

The third structure of destination's strategic thinking is Divača membership in Green Karst (Zeleni Kras) (Figure A.66). Although Divača is not a member, the municipality cooperates and carries out tourism joint activities, related to European projects and marketing.

Fourth, there have been also other project-based attempts for joint tourism governance or management, such as EDEN destination, as part of the EDEN EU network. However, attempts to enter this network have so far not been successful.

Fifth, there are local strategic and political orientations of Divača itself. At this governance level, experts were not able to identify a clear tourism vision, strategy and supported policy for Divača, defined as a municipality. The only valid document is the Environmental report for Divača municipality (Občina Divača, n.d.). The document addresses standards, networks and legislation on protected areas as well as the link to positive and negative impacts of tourism.

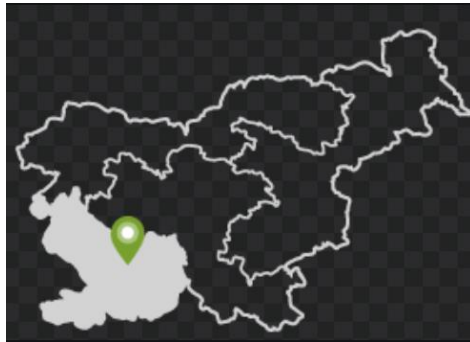
The sixth structure of tourism destination management is Divača's integration into tourist destination Karst association and brand. In order to increase a developmental critical mass and market power, Divača municipality undertakes measures to connect into wider Karst based tourism network with more strategic potential. This more long-term strategic alliance has been achieved with four other destinations: Sežana, Komen, Miren-Kostanjevica, Hrpelje-Kozina (Figure A.67). According to interviews, all involved hope that association will start as a joint destination soon. More specifically, it is expected that a Karst Destination Management Organisation (DMO) will be legally and fully established in the near future as its legal establishment is at the moment in progress. The obstacles to this process stem from the socio-political context, financial burden and the autonomy of five municipalities. Sežana based Regional Development Agency ORA for Kras and Brkini is planned to transform into Karst Destination Management Organisation. This will result in Kras being an operational tourist destination also for Divača community. The joint document Analysis of strategic tourism flows for destination Karst with development and marketing plan for 2019-2024 for Karst has already been prepared.

The relative weight of Divača in destination Karst, in terms of population, is 13%, relative weight of overnight stays is 15% and relative weight in terms of visitors is 53% (this number is higher due to the inclusion of Škocjan caves).

From the perspective of stakeholders and their satisfaction with tourism presence and development, Divača developed a strategic framework for monitoring. Tourism satisfaction surveys show that one third of local residents agree that tourism improves the quality of life in the Divača destination, another third share the opinion that there is no impact. Almost 95% of total visitors

declared that they are happy with the destination experience (CPOEF, 2018). Direct data on business opportunity satisfaction is not available and is not directly addressed in a conducted business survey. In terms of broader sustainability and tourism impacts, only the employment opportunities have been surveyed in one hotel in the destination.

Figure A.66: Map of tourist destination Kras – tourist destination, municipalities Divača, Sežana, Komen, Miren-Kostanjevica, Hrpelje-Kozina



Source: CPOEF, 2018

Figure A.67: Map of tourist destination Zeleni Kras – tourist destination, municipalities Bloke, Cerknica, Ilirska Bistrica, Loška Dolina, Pivka in Postojna



Source: <https://www.zelenikras.si/>

Summary of policy and strategic priorities

According to the above discussed strategic and policy issues, the following strategic tourism capacity issues have been defined for Divača:

- It is evident that Divača is underdeveloped in terms of tourism infrastructure and tourism supply, and still struggles with basic public infrastructure. Tourism is perceived as a positive force, but spill-over linked to the popularity of Škocjan Caves are not entirely exploited. In general, potential destination Karst (and Divača municipality) would like to increase the tourist attractiveness, visitation, average length of stays, and (positive) tourism impacts.
- In terms of economic sustainability, interviewees reported that Divača strategically addresses sustainability through 19 indicators within the Slovenia Green label that Divača holds (Bronze). The destination has a GSST sustainability action plan, that is revised every 3 years.
- Environmental sustainability is strongly supported by the protected areas, most notably by Škocjan Caves. As a UNESCO site, environmental sustainability has a top priority in the municipality.
- The strategic aims are to develop basic tourism infrastructure: gastronomy suppliers, tourist accommodation (small boutique facilities); and to increase the length of stay in the destination, as well as average daily spending.
- Finally, cooperation towards establishing a common DMO for the Karst region as well as efforts to strengthen its touristic prominence of the region and Divača are being undertaken.

It is evident, and also mentioned by the interview correspondents, that the destination is too small and not recognised, although it holds a very strong attraction Škocjan Caves. Except for interviews, this issue together with the lack of tourism infrastructure, are not addressed in documents at the local level. However, these strategy and policy issues may receive a better attention when the Karst DMO is created. The Divača municipality needs a model that would help

undertake steps towards more efficient visitor flows and destination management as well as support future tourism development.

III.1.4 Interviews

Interviews, following the ESPON interview grid template questions and topics have been conducted with stakeholders. An overview is provided in the table below. The material collected from the correspondents has been discussed with director of Divača Developmental Center (Razvojni center Divača) and internally reviewed by other experts from SEBLU. The information collected during interviews has been integrated into the overview of the destination provided in step 1.

Table A.28: Overview of interviewed stakeholders

Interviewee name	Institution/organisation	Position	Contact details
Interviewee 1	Public stakeholder, Divača municipality and agency – tourism governance and management, destination	Leading position in tourism governance and management, destination	Upon request
Interviewee 2	Public stakeholder Institution/organisation: Divača municipality	Adviser, Divača municipality tasks	Upon request
Interviewee 3	Public stakeholder, Divača municipality and agency – tourism management, Green Scheme of Slovenian tourism coordinator destination	Position in tourism management, Green scheme coordinator, reference to strategy Karst	Upon request

Source: Consortium, 2020

III.2 Step 2

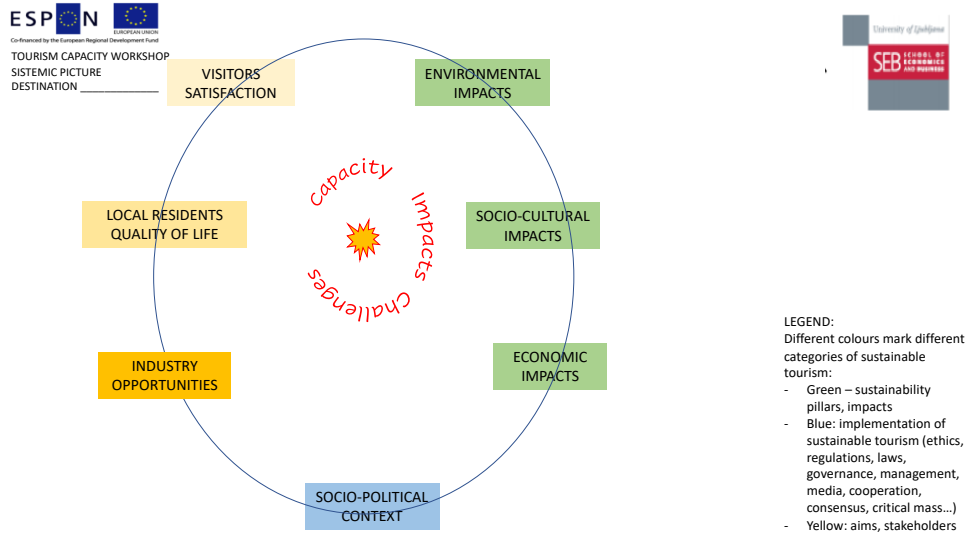
III.2.1 Development of a systemic picture

Preliminary systemic picture

In the destination workshop, the case study authors have followed the ESPON Carrying capacity methodology. Prior to the workshop, a systemic picture and indicator catalogue for destination has been prepared. Experts have been trained to use the same methodological approach in all four destinations. After the meeting, the evaluation by the case study authors has confirmed the proposed methodological approach, which has been very successful. All elements of systemic picture model (see figure below) have been well addressed.

The systemic picture grid offers possible discussion areas for workshop participants with regards to capacity, impacts and challenges. Green elements refer to sustainability pillars and impacts of tourism in the area of each. Yellow fields denote the destination's stakeholders subjective impressions on the satisfaction with tourism presence and opportunities. The socio-political context, coloured blue, captures the dimension of destination's management (including governance and leadership), collaboration among destination's stakeholders, consensus building, strategy, legislation, sustainability awareness, etc. Figure A.69 represents the systemic picture with possible connections already in place, developed by experts as a basis for the workshop.

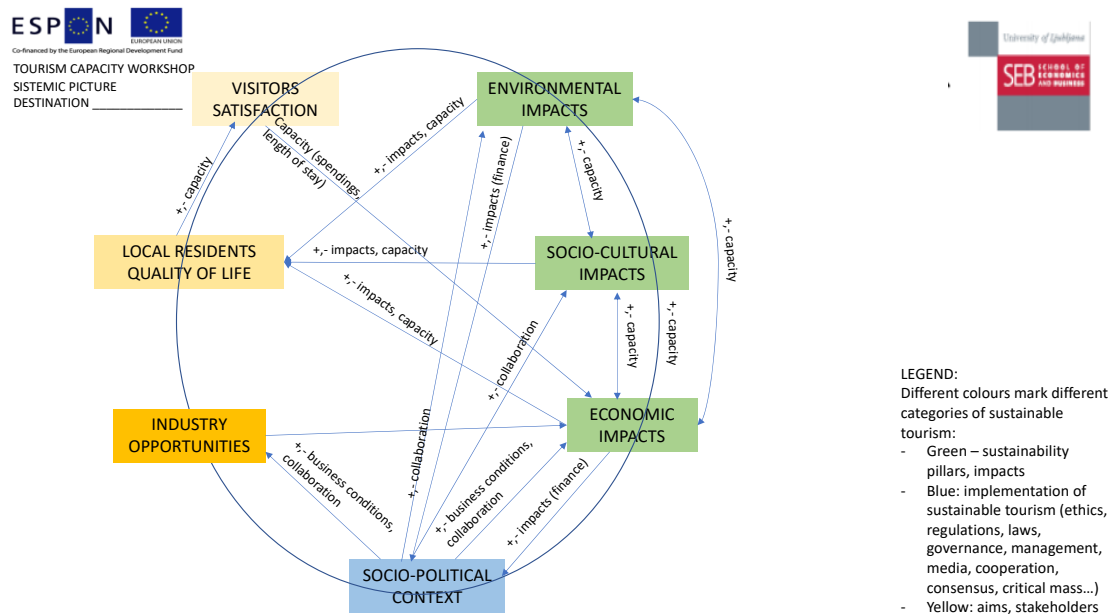
Figure A.68: Systemic picture grid – preliminary



Source: Consortium, 2020.

Interactions among the main boxes address the capacities, impacts and challenges. Example of such connections are pollution through tourism, resident’s dissatisfaction with tourism presence and development, financial flow from tourism attractions for the communal infrastructure in the destination, collaboration between the community and tourism earnings for community development, etc.

Figure A.69: Systemic picture grid – example



Source: Consortium, 2020.

This preliminary systemic picture proposal was shared with participants during the introduction to the workshop, in order to give an informed and structured basis for its further elaboration (in the first part of the workshop) and for the reflection on indicators (in the second part of the workshop).

III.2.2 Identification of context indicators

Before the workshop, an indicator catalogue concerning the socio-economic context of the destination was composed. Appropriate context indicators, selected in order to capture main features of the preliminary systemic picture for Divača, are presented in the table below.

Table A.29: Overview of availability of context indicators

Indicator	Source	Territorial unit	Time	Comments
Area km ²	SORS, destination	Municipality	Annually	Available
Population	SORS, destination	Municipality	Annually	Available
Number of persons in employment (by residence)	SORS, destination	Municipality	Annually	Available
Number of self-employed persons	SORS, destination	Municipality	Annually	Available
Employment/population ratio (%)	SORS, destination	Municipality	Annually	Available
Average monthly gross earnings per person in paid employment (EUR)	SORS, destination	Municipality	Annually	Available
Number of enterprises	SORS, destination	Municipality	Annually	Available
Number of dwellings, Dwelling Stock	SORS, destination	Municipality	Annually	Available
Municipal waste collected (ton)	SORS, destination	Municipality	Annually	Available
Density of population (per km ²)	SORS, destination	Municipality	Annually	Available
Registered unemployment rate (%)	SORS, destination	Municipality	Annually	Available
Natural increase (per 1,000 population)	SORS, destination	Municipality	Annually	Available
Net migration (per 1,000 population)	SORS, destination	Municipality	Annually	Available
Air pollution: PM10	Municipality data	Municipality	yearly	If available
Water quality: parameters	Municipality data	Municipality	yearly	If available
Number of beds (per accommodation type)	SORS, destination	Municipality	Annually	Available
Municipal waste collected (kg/person)	SORS, destination	Municipality	Annually	Available
WIFI access	Tourism 4.0	National	Annually	Available
Mobile data access	Tourism 4.0	National	Annually	Available
Air quality data	ARSO	National	Annually	Available

Source: Consortium, 2020, SEBLU, 2020; SORS, n.d., c.; 2020

III.2.3 Identification of tourism indicators and data

The indicator catalogue concerning the most important tourism-related aspects of the destination has been prepared prior to the workshop. This selection has based on indicators selected by the consortium, as well as ETIS, GSST, CRP and national and destination tourism statistical data. During the workshop, the best fitting indicators for Divača were identified and are presented in the table below.

Table A.30: Overview of availability of context indicators

Indicator name	Source	Territorial unit	Time	Comments
Importance of tourism 1: % of tourism in GDP of the destination	Municipality data	Municipality	yearly	Not available
Importance of tourism 2: % of tourism employees in total employment in the destination	Municipality data	Municipality	yearly	Not available
Arrivals: Number	SORS	Municipality	Yearly, monthly	Available
Overnights: number	SORS	Municipality	Yearly, monthly	Available

Indicator name	Source	Territorial unit	Time	Comments
Average length of stay	SORS	Municipality	Yearly, monthly	Available
Arrivals growth: %	SORS	Municipality	Yearly, monthly	Available
Overnights growth: %	SORS	Municipality	Yearly, monthly	Available
Visitors – destination	SORS	Municipality	Yearly, monthly	Available
Visitors – per attraction	Attraction operator	Attraction	Yearly, monthly	If accessible
Tourism density – destination	SORS	Municipality	Yearly, monthly	Available
Tourism intensity – destination	SORS	Municipality	Yearly, monthly	Available
Visitation concentration per day or season	Municipality data	Municipality	yearly	If available
Arrival seasonality	SORS	Municipality	Yearly, monthly	Available
Residents' satisfaction with tourism	Municipality data	Municipality	As per conducted survey	Available, GSST
Visitors satisfaction with visitation	Municipality data, data on TripAdvisor and booking portals	Municipality	As per conducted survey	Available, GSST, available on Trip Advisor and booking portals
Tourism industry satisfaction with tourism opportunities	Municipality data	Municipality	As per conducted survey	Available, GSST (check confirmed that quantitative data is not available)
Number of Škocjan Caves visitors	SORS, destination	Municipality	Annually, monthly	Available

Source: Consortium, 2020

III.2.4 Systemic Picture Workshop

Participants

Table A.31: Overview of invited participants

Participant	Institution/organisation	Position
Participant 1	Divača municipality	Adviser
Participant 2	ORA Krasi in Brkinov (future DMO)	Director
Participant 3	Farm	Farmer
Participant 4	Tourist association TKŠD Urbanščica	Civil society
Participant 5	Development Centre (Razvojni center) Divača	Director
Participant 6	Parc Škocjan Caves	Commercialist
Participant 7	Sloactive d.o.o.	Tourist Agency
Participant 8	Parc Škocjan Caves	Director
Participant 9	Municipality Divača	Mayor
Participant 10	SEBLU	SEBLU ESPON expert

Note: Full list by names available from ESPON project documentation

Outcomes of the Systemic Picture Workshop

Discussion of destination's needs as well as policy and strategic orientation

Validation of needs assessment

How did the participants assess expert assessment of destination's needs? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what

has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

The participants were in agreement with expert needs assessment. There was a consensus with regards to the assessment that the main attraction are Škocjan caves. It was acknowledged that Divača is a small-scale destination, in terms of general and tourism infrastructure, superstructure and variety of tourism products. The possibilities for tourism development, based on natural and heritage products are many; however, the transformation process towards tourism market is slow. In addition, the potential of the railway tradition as a tourism attraction has been emphasised by workshop participants and can represent an additional tourism product development opportunity.

Validation of policy and strategic orientation

How did the participants assess expert assessment of destination's policy and strategic orientation? How does expert assessment need to be modified? What are the most highlighted issues by stakeholders: what has been particularly emphasised and what has been assessed as less important? What are experts' further comments and impressions based on discussions?

The participants validated the policy and strategic issues. They were committed to municipality territory of Divača and also aware and inclined to the emerging destination Karst which will join Divača and the four neighbouring municipalities into a larger destination. They were aware and supportive of the joint strategic document produced by the emerging Karst destination. The stakeholder from Development Agency for Karst and Brkini from Sežana explained the process and the obstacles in the process of establishing DMO for destination Karst. However, the stakeholder was positive and expects the DMO to be fully established and to start performing DMO tasks soon. Financial aspect has also been mentioned as a possible challenge. This discussion has been placed into systemic picture grid into box "socio-political context" of the destination. The mentioned box fitted well for discussed structural and organisational, as well as political and financial issues in relation to tourism developmental challenges.

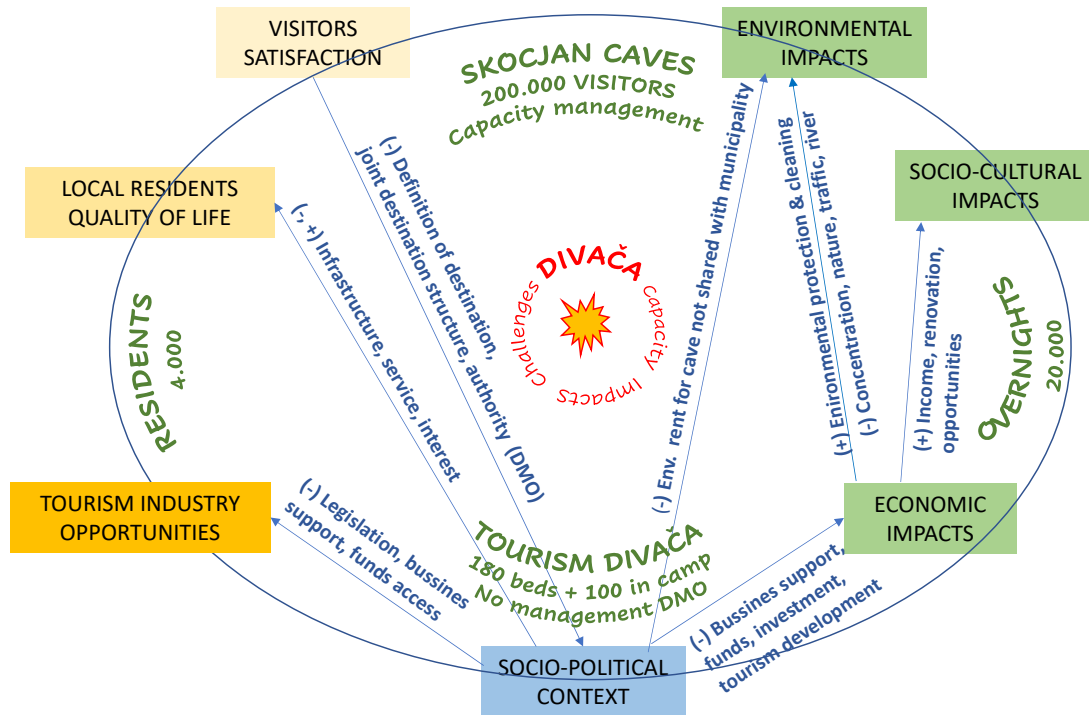
Final systemic picture

What was particularly striking/interesting difference between expert systemic picture and those prepared by participants?

Participants worked successfully with the systemic picture model. The destination specific characteristics have been discussed and information and clarifications have been added in the discussion. Discussed aspects are presented in Figure A.70 and do not significantly differ from the information that the expert gathered during interviews.

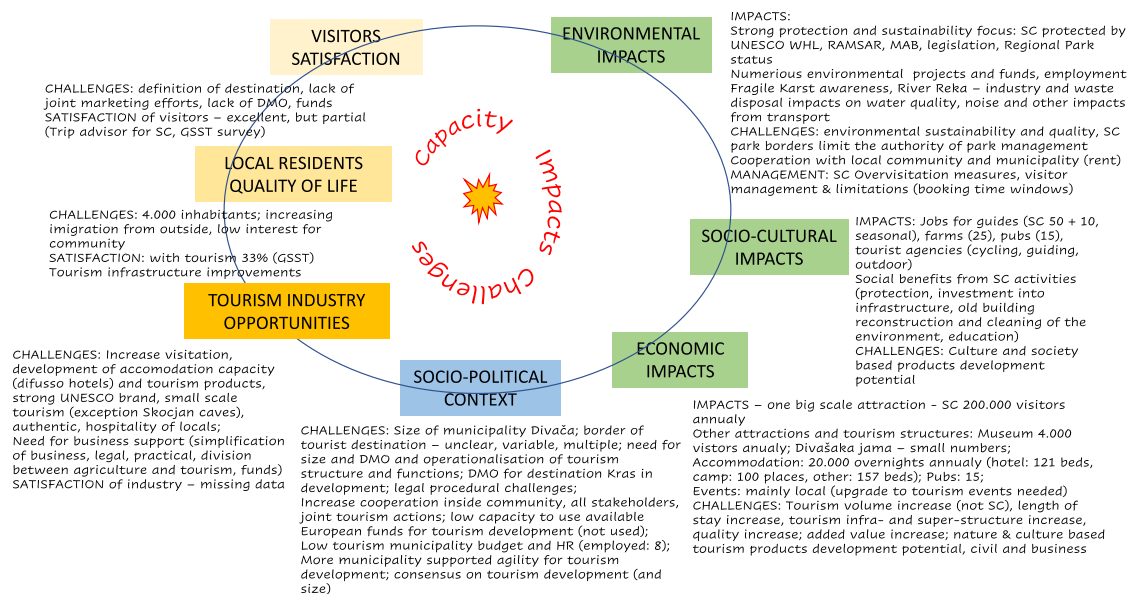
Workshop's participants addressed all the elements of the proposed systemic picture grid, no irrelevant boxes have been found. Participants discussed capacities, impacts, challenges and opportunities with regards to each dimension. The discussion has been moderated by design thinking approach and resulted in 32 different joint issues, related to one or more topics of the proposed systemic picture model. These elements are captured in Figure A.71.

Figure A.70: Systemic picture Divača – final workshop outcome



Source: Designed from the workshop results for destination Divača

Figure A.71: Comments and analyse outcome of Divača workshop



Source: Designed from the workshop results for destination Divača

Analysis of the systemic picture

What important points about the systemic picture did the group work and discussions centre around?

The following points, impacts and challenges with regards to different dimensions of the destination's development and tourism management are presented below:

Sustainability pillars

Environmental pillar workshop discussion/results	<p>Impacts</p> <ul style="list-style-type: none"> – Tourism brings positive impacts in terms of strong protection and sustainability focus: SC protected by UNESCO WHL, RAMSAR, MAB, legislation, Regional Park status – Tourism brings positive financial impacts: numerous environmental projects and funds, employment – Negative tourism impacts refer to fragile environment, pollution of River Reka, industry and waste disposal impact on water quality, noise and other impacts from transport <p>Challenges</p> <ul style="list-style-type: none"> – To improve environmental sustainability and quality, – to extend the positive tourism impact on the environment by Škocjan Caves, as it is limited by SC park borders that limit the authority of park management – to intensify the cooperation with local community and municipality (rent) – to further implement SC Over visitation measures, visitor management & limitations (booking time windows)
Socio-cultural impacts workshop discussion/results	<p>Impacts</p> <ul style="list-style-type: none"> – Tourism brings positive impacts, such as jobs for guides (SC 50 + 10, seasonal), farms (25), pubs (15), tourist agencies (cycling, guiding, outdoor) – Other positive tourism impacts are social benefits from SC activities (protection, investment into infrastructure, old building reconstruction and cleaning of the environment, education) <p>Challenges</p> <ul style="list-style-type: none"> – To develop culture and society-based products, based on the destination's resources
Economic impacts workshop discussion/results	<p>Impacts</p> <ul style="list-style-type: none"> – Tourism brings high volume of visitors (and its positive and negative impacts) for one big scale attraction only – SC 200,000 visitors annually – Other attractions are too small tourism scale and impacts (capacities are museum 4,000 visitors annually; Divaška jama – small numbers; accommodation: 20,000 overnights annually (hotel: 121 beds, camp: 100 places, other: 157 beds); Pubs: 15 establishment) – Tourism and visitation bring too small positive impacts for the events, events are mainly local (upgrade to tourism events needed) <p>Challenges</p> <ul style="list-style-type: none"> – To increase tourism volume and impacts (not SC), length of stay increase, tourism infra- and super-structure increase, quality increase; added value increase; nature & culture-based tourism products development potential, civil and business

Stakeholders

Visitors satisfaction workshop discussion/results	<p>Challenges</p> <ul style="list-style-type: none"> – To establish a proper destination by DMO (in progress) – lack of joint marketing efforts – lack of DMO, funds <p>Satisfaction</p> <ul style="list-style-type: none"> – of visitors – excellent, but partial (Trip advisor for SC, GSST survey)
Tourism industry opportunities discussion/results	<p>Challenges</p> <ul style="list-style-type: none"> – Increase visitation and industry opportunities – Development of accommodation capacity (difusso hotels) and tourism products, strong UNESCO brand, small scale tourism (exception SC), authentic, hospitality of locals; – Need for business support (simplification of business, legal, practical, division between agriculture and tourism, funds) <p>Satisfaction</p> <ul style="list-style-type: none"> – of industry with business opportunities – missing quantitative data
Local residents quality of life discussion/results	<p>Challenges</p> <ul style="list-style-type: none"> – municipality is a small size (4,000 inhabitants), influx of new residents from outside for homes is increasing, newcomers have low interest for community events, activities, collaboration, contribution

Satisfaction

- Of local residents with tourism presence: 33% (GSST)
 - Satisfaction with tourism infrastructure improvements
-

Systemic picture category

Socio-political context workshop discussion/results

Challenges

- Size of municipality Divača; border of tourist destination – unclear, variable, multiple; need for size and DMO and operationalisation of tourism structure and functions; DMO for destination Kras in development; legal procedural challenges;
 - Increase cooperation inside community, all stakeholders, joint tourism actions; low capacity to use available European funds for tourism development (not used);
 - Low tourism municipality budget and HR (employed: 8);
 - More municipality supported agility for tourism development; consensus on tourism development (and size).
 - Stakeholders highlighted the role and impacts of Park Škocjan Caves on the entire destination. It became evident that Park has a strong structure, finance and projects for sustainable development and management and is responsibly addressing many relevant environmental issues in the municipality (infrastructure cost participation, waste disposal, quality of water of river Reka, employment of guides, etc.) On the other hand it has been clarified that there are no systemic channels to guarantee financial cooperation between the Park and municipality, such as regular payments in a form of concession fee (as per national Environmental protection law), due to different management model of the Park Škocjan Caves, compared to Postojna cave (natural attraction is managed by a private company and through the concession, which is partially the income of the Postojna community). In this context the finance of destination's DMO could be improved.
 - The destination seems to have no strong issues in regard to stakeholder's satisfaction. The discussion findings are summarised below.
-

Environmental impacts and challenges

According to workshop participants, tourism brings positive impacts in terms of strong protection and sustainability focus: Škocjanske Caves are protected by UNESCO WHL, RAMSAR, MAB, by national legislation; and by the Regional Park status. Tourism brings positive financial impacts: numerous environmental projects and funds, employment. Many of these effects are strongly connected to the activities and management of Park Škocjanske Cave. Negative tourism impacts refer to fragile environment, pollution of River Reka, industry and waste disposal impact on water quality, noise and other impacts from transport. High environmental and social sustainability awareness of the park has been noted.

The challenges are to further improve environmental sustainability and quality of the environment as well as to extend the positive tourism impact on the environment by the protection status of Škocjan Caves. Currently, it is partially limited by Parc Škocjan Caves borders that limit the authority of park management. The cooperation with local community and municipality needs to be intensified and financial contribution should be increased. In case of Park Škocjanske Cave, concession deed and concession fee do not exist, due to different management model (compared to Postojna Cave). Another challenge, or a future task, is to further develop and adjust Škocjan Cave's over-visitation measures, visitor management & limitations (booking time windows).

Socio-cultural impacts and challenges

Tourism brings positive impacts, such as jobs for guides. Škocjan Caves employ 50 to 60 guides, some of them are seasonal. Moreover, there are 25 tourism farms, 15 pubs and tourist agencies for cycling, guiding and outdoor activities. Various events are organised by local initiatives and by tourism and cultural associations. Other positive tourism impacts are social benefits from Parc Škocjan Caves activities (protection, investment into infrastructure, old building reconstruction and cleaning of the environment, education).

There is a need and challenge to develop new culture and society-based products, based on the destination's resources and offer them on tourism market.

Economic impacts and challenges

Tourism brings high volume of visitors in Škocjanke Caves. The impact of other attractions is limited. More specifically, museum capacity is 4,000 visitors annually; Divaška jama can accept small numbers of guided visitors. The available accommodation accepts only 20,000 overnights annually. There are 121 hotel beds, 100 places in camps, 157 beds in other establishments; and 15 pubs. Local events do not have the capacity to attract tourists.

Thus challenge is to increase tourism volume and impacts outside of Škocjanske Caves and to increase length of stay, to develop tourism infra- and super-structure. At the same time, it is necessary to increase the quality and to develop a nature and culture-based tourism products. Supporting civil and business cooperation and private – public partnerships should be a tool to accelerate this.

Stakeholders and satisfaction

Visitor satisfaction

Surveys of visitor satisfaction on TripAdvisor and by Green Scheme demonstrate high satisfaction. However, they need to become regular.

In order to measure and manage visitor satisfaction, the implementation of the DMO is needed, which is in a process of establishment. Currently the destination lacks the marketing approach and funds for marketing.

Tourism industry opportunities

The data on the satisfaction of business partners is not available. A qualitative study on business exists, but the business opportunities have not been addressed.

Tourism industry satisfaction and opportunities are challenged by too small business volume that reduces the potential synergies and opportunities, The correspondents suggested to further develop the accommodation capacity (such as difusso hotels) and tourism products, build on strong UNESCO brand, focus on small scale tourism (exception Škocjan Caves), authenticity and hospitality of locals. There is evident need for wider support for small business

(simplification of business procedures, legal assistance and advice, sharing practical best cases, division between agriculture and tourism, funds and access to funds).

Local residents' quality of life

According to Green Scheme data, around 33% of local residents declared satisfaction with tourism presence and development in the Divača destination. They also noticed tourism infrastructure improvements.

However, the relationship between the quality of life for residents and tourism is challenged by the changing structure of the population. New residents are moving into a small community of 4000 residents, to live there, but do not integrate into the community issues, such as activities or (tourism) events. Further, non-existent DMO weakens the relationship, as some tourism destination's functions are not performed.

Socio-political context

The socio-political box in the systemic grid captured many socially or politically relevant issues in regard to tourism presence and development in destination. Among others, poor competences of Divača municipality to perform functions and activities of a tourist destination has been noted.

There are many challenges that workshop participants have pointed out in relation to tourism in Divača. The main challenge is the understanding of tourism competences of Divača municipality. Size and resources of municipality are small, borders of "Divača destination" are unclear, variable, multiple. This is due to the fact that the municipality is entering various associations and projects to perform destination functions, such as marketing, promotion, development. A clearer understanding of cooperation structures is needed. There is a need for a DMO and for an operationalisation of tourism structure and functions.

There is a need to increase cooperation inside the municipality, to involve all stakeholders and to perform joint tourism actions. The capacity to use available European funds for tourism development is low (due to too small municipality resources, including human) and such sources are not used. The financial and human resources of the municipality are low. More political agility for tourism development consensus on tourism development and size is needed.

Stakeholders highlighted the role and impacts of Park Škocjan Caves on the entire destination. It became evident that Park has a strong structure, finance and sustainable development projects as well as good management. It responsibly addresses many relevant environmental issues under its competences, such as infrastructure cost participation, waste disposal, quality of water of river Reka, employment of guides, etc. However, it has been clarified that there are no systemic channels to guarantee financial cooperation between the Park and municipality, such as regular payments in a form of concession fee (as per national Environmental protection law). This is due to different management model of the Park Škocjan Caves, compared to Postojna cave (natural attraction is managed by a private company and through the concession, which is partially the income of the Postojna community).

Identification and verification of indicators and data sources

How did the participants assess the expert suggestion on indicators and data sources?

Participants agree that key indicators for Divača tourism have already been developed by their tourism strategic document for destination Karst and have related these to the municipality of Divača. The carrying capacity indicators (from the indicators catalogue) are relevant for addressing tourism development. They also emphasised the GSST and the indicators that are suggested by the scheme of which destination Divača is already a member. The availability of indicators is limited to statistical indicators and indicators from the GSST, which also provide the tourism stakeholders' satisfaction studies.

Additional comments and observations

In general, the workshop was productive and the participants were competent and motivated. As this workshop was held shortly before the lockdown due to the coronavirus crisis, some invitees have not attended.

III.3 Step 3

III.3.1 Data collection

The data collection is based on Tables 5 and 6 (see Step 2) which include the identified context and tourism indicators. The suggested indicators are based on the municipality level in order to identify the most important indicators from the stakeholder perspective. The involved stakeholders indicated 10 indicators upon their availability and importance for their tourism destination:

Table A.32: Stakeholder selection of indicators in Divača

Indicator name	Source	Territorial unit	Time	Access to the data ⁷	Data integrated in the Dashboard
Arrivals	SORS	Municipality Divača	Yearly, monthly	Yes	Yes
Overnights	SORS	Municipality Divača	Yearly, monthly	Yes	Yes
Length of stay	SORS	Municipality Divača	Yearly, monthly	Yes	Yes
Arrivals growth (arrivals change)	SORS	Municipality Divača	Yearly, monthly	Yes	Yes
Overnights growth (overnights change)	SORS	Municipality Divača	Yearly, monthly	Yes	Yes
Visitors		Municipality Divača		No	No (geotagged photos from Instagram as proxy; source: Picodash)

⁷ Access to the data is only given if the data is open access data.

Indicator name	Source	Territorial unit	Time	Access to the data ⁷	Data integrated in the Dashboard
Visitors at attractions	Attraction providers	Municipality Divača		No	No (geotagged photos from Instagram as proxy; source: Picodash)
Tourism density	SORS	Municipality Divača	Yearly	Yes	Yes
Tourism intensity	SORS	Municipality Divača	Yearly	Yes	Yes
Seasonality	SORS	Municipality Divača	Yearly (based on monthly data)	Yes	Yes

Source: Consortium 2020

All of these indicators are to be considered tourism performance indicators and are to be considered statistical data and available from SORS (except for the two indicators visitors and visitors at attraction) at monthly and annual frequencies and seem, from a general point of view, commensurate with the identified major needs in Step 1. In total, the dashboard developed by the project team features 24 indicators to be considered as statistical data – both tourism performance and territorial context indicators (see Table A.33).

Table A.33: Indicators in the database (alphabetical order)

Indicator	Time series for Divača
Ageing	2008-2019
Population >=65/Population <=14	
<Methodological Explanations: Slovenia>	
Arrivals	2008-2019
Tourist Arrivals	
<Methodological Explanations: Slovenia>	
Arrivals Change	2008-2019
Annual Change in %, Base Year is Previous Year	
Bedspaces	2008-2017
Number of Indivisible Units and Bedspaces that are Available to Tourists	
<Methodological Explanations: Slovenia>	
Bedspaces Change	2008-2017
Annual Change in %, Base Year is Previous Year	
Bedspaces Intensity	2008-2017
Bedspaces/Population	
Employment	2005-2019
Persons in Employment by Municipalities of Employment	
<Methodological Explanations: Slovenia>	
Employment Ratio	2002-2016
% of Labour Force within the Working Age Population	
<Methodological Explanations: Slovenia>	
Enterprises	2008-2018
Number of registered legal or natural person, which had either turnover or employment or investments during the reference year.	

Indicator	Time series for Divača
<Methodological Explanations: Slovenia>	
Green Certificate	2020
Tourism Providers with Slovenia Green Label	
<Methodological Explanations: Green Scheme of Slovenian Tourism>	
Income	2005-2019
Average Monthly Cross Earnings	
<Methodological Explanations: Slovenia>	
Length of Stay	2008-2019
Overnights/Arrivals	
Natural increase	1995-2018
Difference between the Number of Births and Deaths	
<Births – Methodological Explanations: Slovenia> <Deaths – Methodological Explanations: Slovenia>	
Overnights	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Overnights change	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Population	2008-2019
<Methodological Explanations: Slovenia>	
Population density	2008-2019
Population/Square Kilometer Surface	
Seasonality	2008-2019
Gini Coefficient based on Monthly Bednights	
Surface	2020
Square kilometre surface covered by the municipality's borders	
Tourism Density	2008-2019
Arrivals/Square Kilometer Surface of the Municipality	
Tourism Intensity	2008-2019
Arrivals/Population	
Turnover	2008-2018
...of enterprises (1,000 EUR) is the total amount that the enterprise settled with sale of goods, material and performed services in the reference year. It is measured on the basis of selling prices stated on invoices and other documents less discounts at sale or later on and the value of returned quantities. It includes all costs and charges linked to the buyer and excludes all duties and taxes on the goods or services invoiced by the unit and value added tax, possible sale of fixed assets, financial turnover, subsidies and other extra turnover. Data on turnover of enterprises from 2013 also included turnover of banks and savings banks.	
<Methodological Explanations: Slovenia>	
Unemployment	2005-2016
% of Registered Unemployed within the Active Population	
<Methodological Explanations: Slovenia>	
Waste	2008-2018
Municipal Waste Collected by Public Waste Removal Scheme (kg/capita)	
<Methodological Explanations: Slovenia>	

Source: Consortium 2020

Concerning the indicators visitors and visitors at attraction the project team suggests to evaluate hotspots in terms of points of interest (POI) and Instagram density instead as proxies, which are also available on the dashboard.

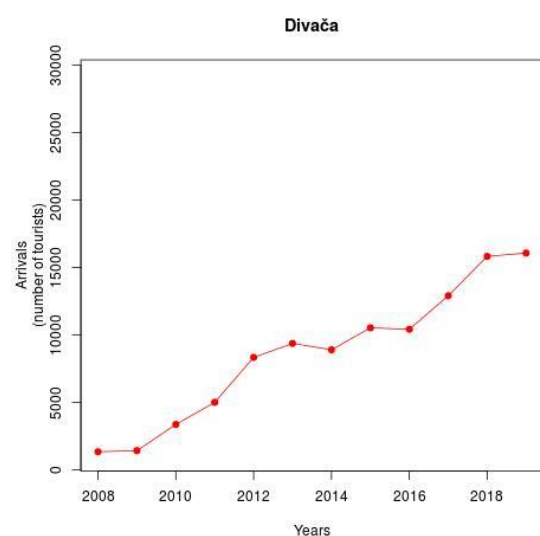
III.3.2 Tourist flow estimation

Using the data available on the dashboard, tourist flows can be estimated in various way. Taking into account the preferences of the stakeholders, evaluating the evolution of the all indicators seems to be of particular importance. Note: scale of y-axis may differ between the plots for two municipalities, so one should take that into account in interpretations.

For the period 2008 to 2019, arrivals have grown continuously, reflecting an increasing interest in Divača as a tourist destination. However, growth of arrivals was stronger at the beginning of the observed period than at the end.

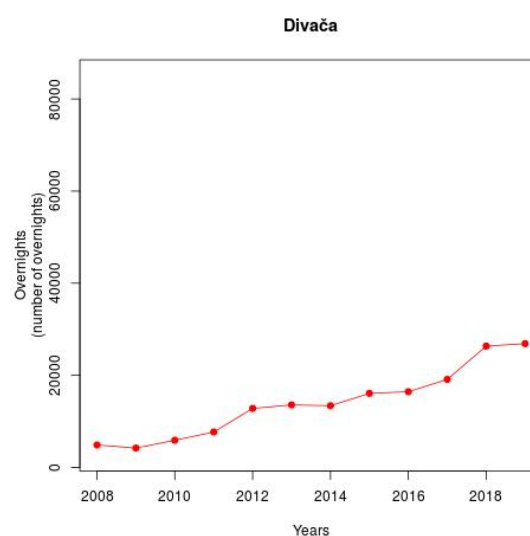
Overnights have also grown steadily (see Figure A.73), but in a more moderate way than arrivals. This has also resulted in a decrease in the average length of stay of tourists in Divača. A decreasing length of stay, which is depicted in Figure A.74, implies more tourists who only stay for one night and also more excursionists. This also implies less value added generated and more traffic (and higher CO₂ emissions) per trip, which typically have a negative impact on the economic and the environmental pillar of sustainability, respectively.

Figure A.72: Arrivals 2008-2019



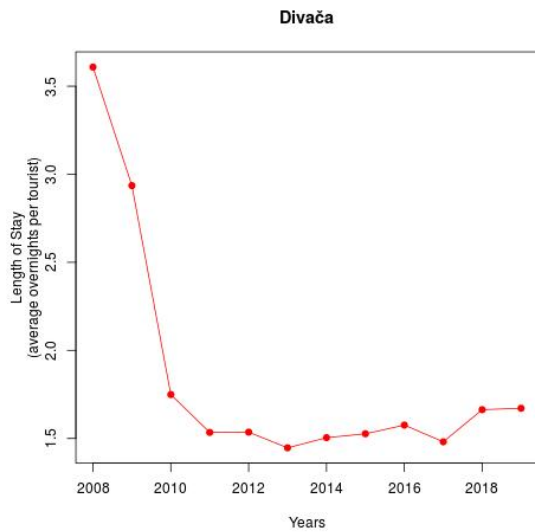
Source: Consortium (2020)

Figure A.73: Overnights 2008-2019



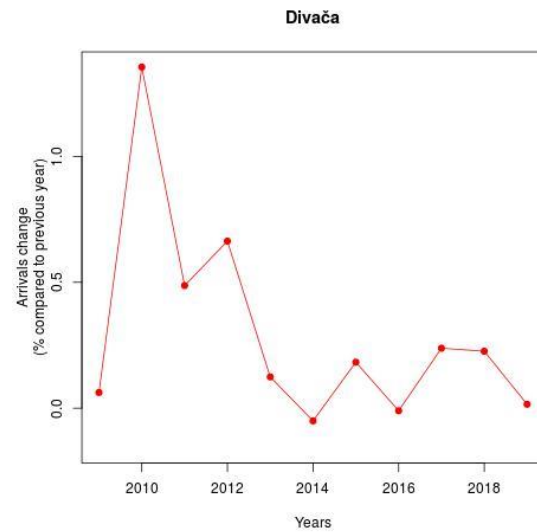
Source: Consortium (2020)

Figure A.74: Length of stay (overnights/arrivals) 2008-2019



Source: Consortium (2020)

Figure A.75: Arrivals change 2009-2019

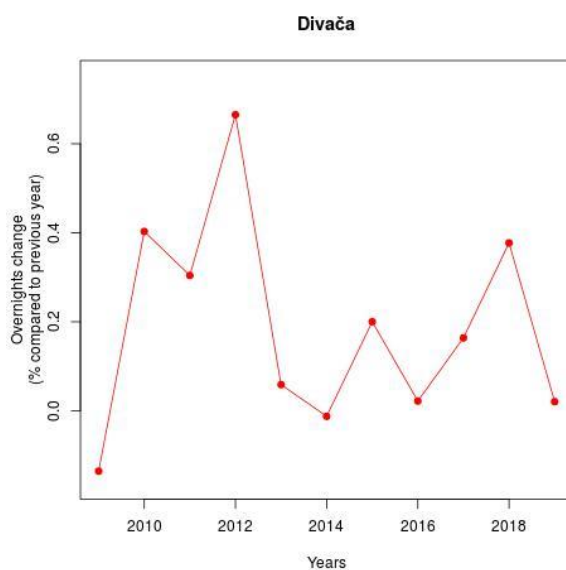


Source: Consortium (2020)

The positive but declining growth of arrivals can also be seen more directly in terms of the change of arrivals from year to year (see Figure A.74). The fact that overnights have only been growing moderately, thus resulting in a decreased average length of stay can also be seen when plotting the change of overnights from year to year.

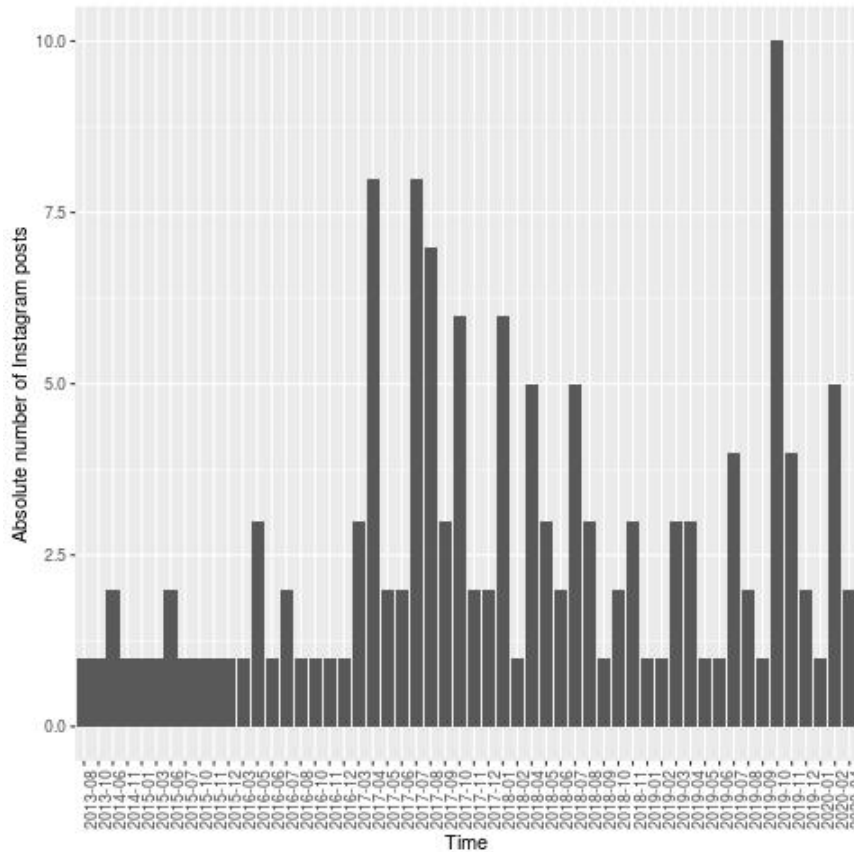
The following indicators are very closely related – arrivals, overnights, length of stay, arrivals change, overnights change, whereby length of stay, arrivals and overnights change are derivatives of the indicator arrivals and/or overnights. Thus, arrivals and overnights, will also be employed for sub-step III.3.3. Overnights change is visualized in Figure A.76 for the period 2009-2019.

Figure A.76: Overnights change 2009-2019



Source: Consortium (2020)

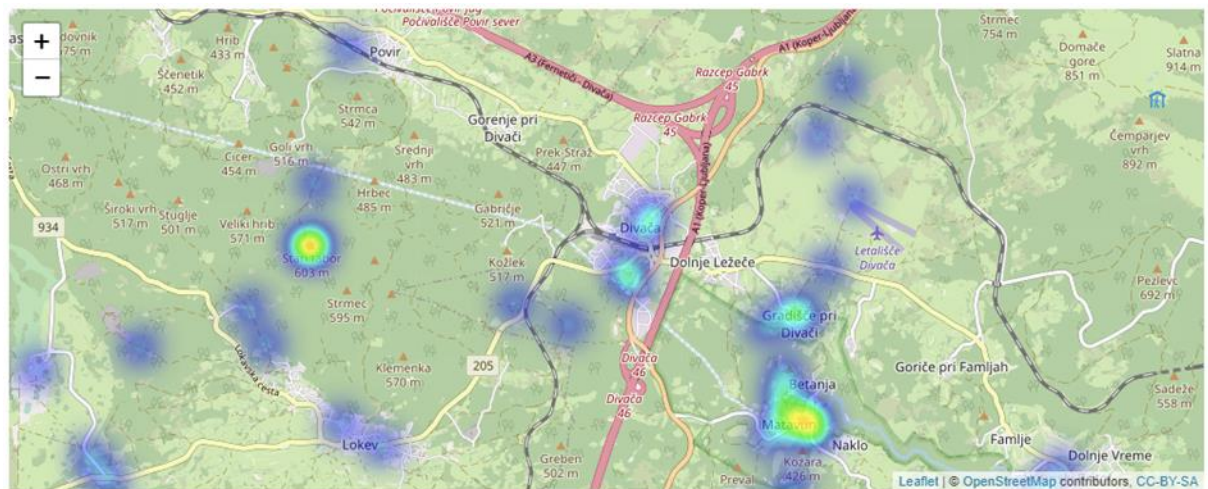
Figure A.77: Instagram posts over time (Divača)



Source: Consortium (2020)

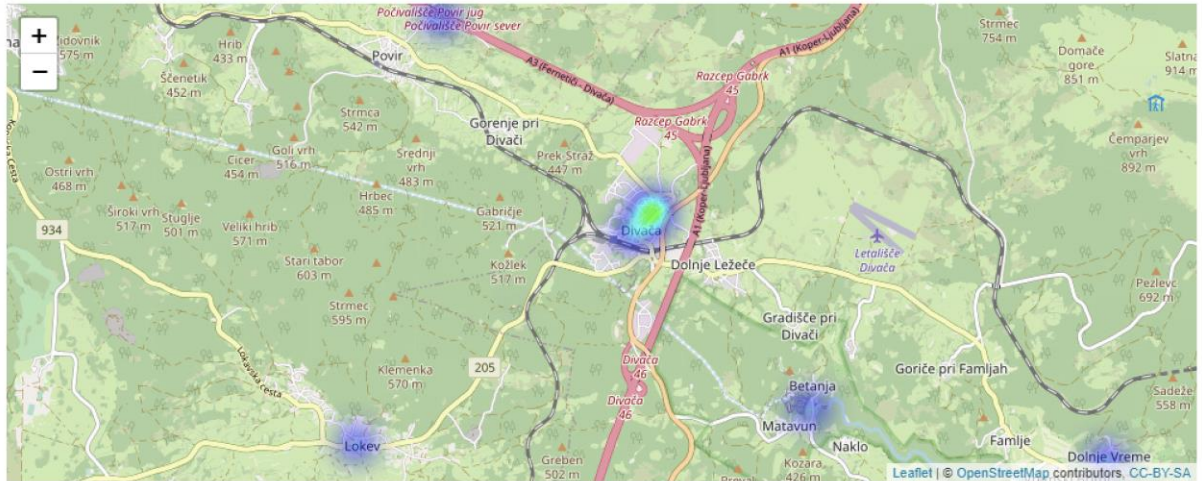
When evaluating the number of Instagram posts in combination with the POIs as proxies for the indicators visitors and visitors at attraction in the indicator wish list (see Table A.32), one can see that Divača has only raised moderate interest among Instagram users to date over the past three years (see Figure A.77).

Figure A.78: POI density (Divača)



Source: Consortium (2020)

Figure A.79: Instagram density (Divača)



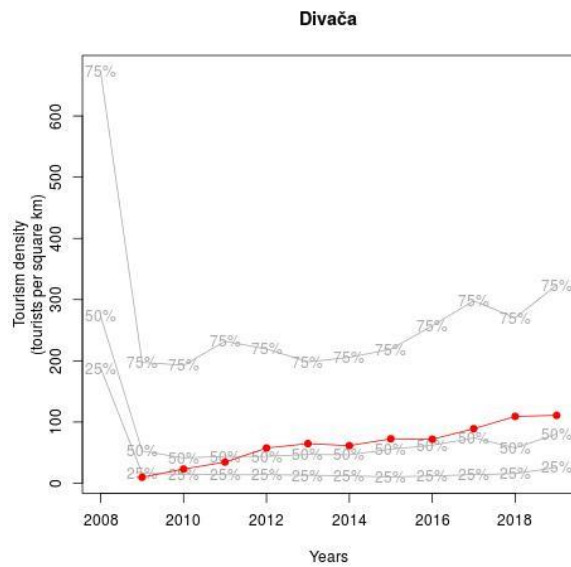
Source: Consortium (2020)

This finding is also mirrored when comparing POI (see Figure A.78) and Instagram density (see Figure A.79) in terms of heat maps. Yellow areas highlight more dense areas of POIs or Instagram posts, respectively, than green or blue areas. Apart from Divača's town center and the Škocjan Caves, there seems to be only little spatial overlap between these two variables. To make Divača more popular among young travelers (who are typically overrepresented on Instagram), Divača could maybe take up specific online marketing measures such as a "best picture competition" using specific hashtags of the so far underrepresented POIs.

The indicators tourism density, intensity and seasonality are displayed using the "time series quartile benchmark" option. If this option is selected in the dashboard, the 25%, 50%, and 75% quartiles are determined (out of all municipalities for which data are available for the respective year) and these values are displayed over the years. Quartiles are determined by ranking all municipalities according to the selected indicator and determining the threshold that separates the 25% of those municipalities scoring lowest on the selected indicator from the rest, the 50% threshold that cuts the ranked indicator in the middle and in this way splits all municipalities half-half (the so-called median), and the 75% threshold separating the highest scoring 25% from the rest.

Tourism density, which is defined as arrivals/square kilometer surface of the municipality has been moderately increasing between 2008 and 2019, indicating only a moderate pressure on Divača's carrying capacity. It has also been only slightly above the 50% quartile over the year, thus also showing a moderate pressure on Divača's carrying capacity compared to other municipalities of Slovenia (see Figure A.80). However, Divača moved several rank places upwards from the 25% threshold to the 50% threshold over the years indicating an increase in tourism pressure from low to moderate.

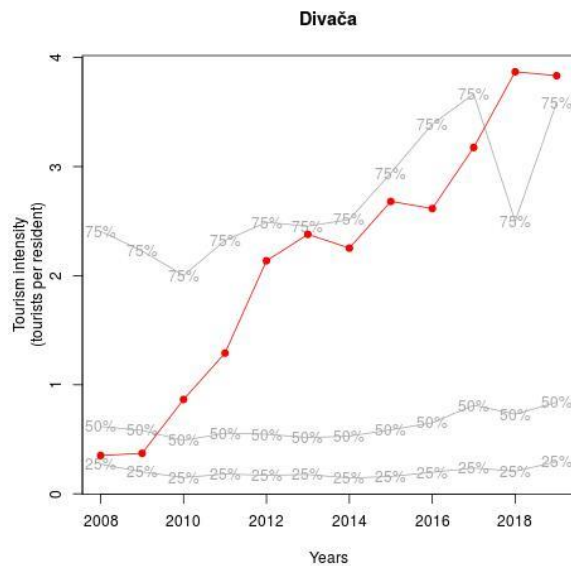
Figure A.80: Tourism density (arrivals/surface area) quartiles (Divača)



Source: Consortium (2020)

Tourism intensity, which is defined as arrivals/population, in turn, shows a strongly increasing pressure on carrying capacity over time, also in comparison to other municipalities of Slovenia, with values ranging above the 75% quartile in 2018 and 2019. A shift from the 25% threshold above the 75% threshold is visible over time (see Figure A.81). This is a result which is suggested being monitored once tourism will have picked up again after the COVID-19 pandemic.

Figure A.81: Tourism intensity (arrivals/population) quartiles (Divača)



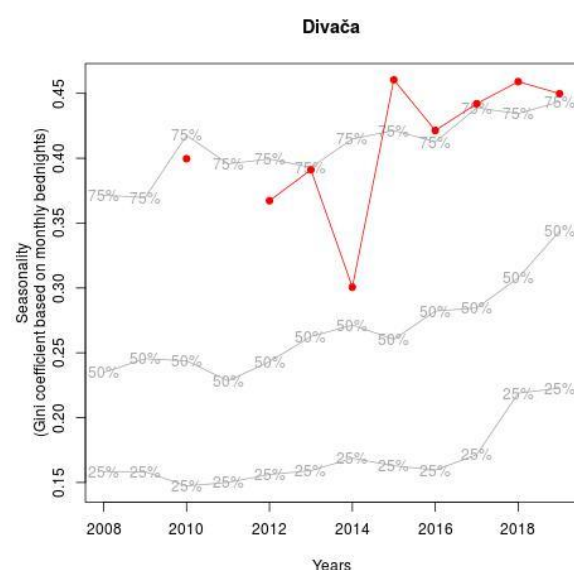
Source: Consortium (2020)

A similar reasoning hold for seasonality, which is defined as the Gini Coefficient based on monthly overnights, The Gini Coefficient, G, is a measure of statistical dispersion, which is defined for the range: $0 \leq G \leq 1$, with the extreme value $G = 0$ representing a completely equal distribution of monthly overnights throughout a year (i.e., no seasonality) and the extreme value

G = 1 representing a completely unequal distribution of monthly overnights throughout a year (i.e., “absolute” seasonality with tourists coming in only one month of year).

With Gini Coefficient values ranging around 0.45 over the past five years, seasonality is definitely not negligible for Divača (see Figure A.82). During these five years, Divača has also constantly been above the 75% quartile compared to other municipalities of Slovenia indicating an unbalanced number of arrivals throughout the years. Seasonality has negative implications on touristic turnover, employment, infrastructure costs, etc., and should therefore also be monitored once tourism will have picked up again after the COVID-19 pandemic.

Figure A.82: Seasonality (Gini coefficient based on monthly overnights) quartiles (Divača)



Source: Consortium (2020)

As they stand, an isolated analysis of the tourism performance indicators should only be seen as a necessary condition yet not a sufficient condition for analyzing the development of Divača’s carrying capacity, which is carried out in sub-steps III.4.1 and III.4.2.

III.3.3 Tourist flow prediction

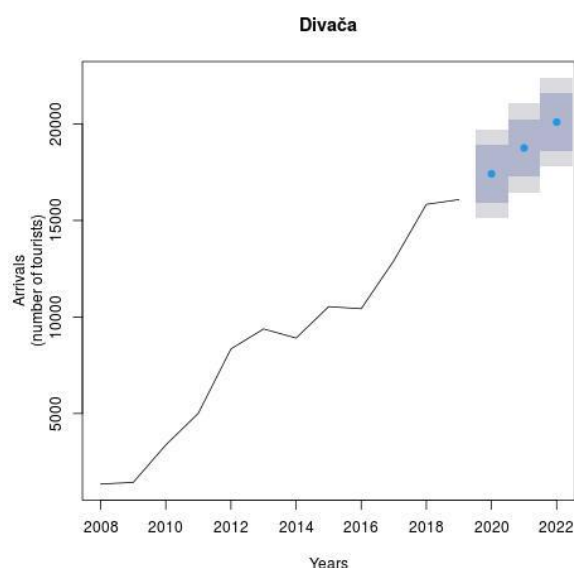
Out-of-sample annual forecasts for arrivals and overnights for the next three years are produced using the “forecast” package for R and its “forecast” function). In more detail, point and interval forecasts (80% and 95% confidence intervals) are calculated for a forecast horizon of three periods ahead, while being robust against missing values and outliers in the forecast variable.

The forecast model employed is selected automatically from a range of 30 possible specifications of the univariate Error Trend Seasonal (ETS) forecast model class by minimizing the Corrected Akaike Information Criterion (AICc), which is suitable for small samples. The ETS forecast model class, which comprises all traditional exponential smoothing models, is a state-space framework consisting of one signal equation for the forecast variable, as well as of one

up to three state equations for the unobservable components of the forecast variable. The parameters of the different ETS specifications are estimated using maximum likelihood methods.

All forecasts are based on historical data which is only available until 2019, therefore the COVID-19 pandemic of 2020 cannot be depicted in this forecast, which has to be taken with a grain of salt.

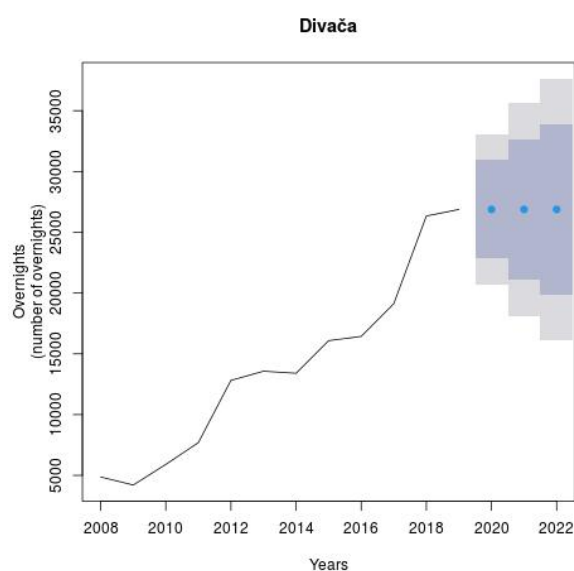
Figure A.83: Arrivals forecast (Divača)



Source: Consortium (2020)

Arrivals are forecast to continue increasing over the next three years (see Figure A.83).

Figure A.84: Overnights forecast (Divača)



Source: Consortium (2020)

Overnights, in turn, are forecast to remain constant over the next three years (also to be taken with a grain of salt given the COVID-19 pandemic of 2020) as can be seen in Figure A.84. This

implies an even stronger pressure on the average length of stay and the resulting distress on sustainability.

III.4 Step 4

III.4.1 Combining tourism and territorial context indicators into tourism impact

Based on desk research, the project team of SEBLU had identified four key needs of the destination/municipality Divača (see Step 1), which were later assessed and confirmed through interviews by three public stakeholders from the municipality and agency of Divača.

- I. **The need to progress towards sustainability and life quality** (i.e., reduced pressure on the environment, a more responsible development strategy, an increased quality of life of the local population) as Divača is characterized by low productivity growth, slow adjustment to demographic changes, high labour market segmentation of the youth, low economic and social inclusion of older people, high greenhouse gas emissions, thereby also facing challenges in waste management;
- II. **The need to connect tourism development in Divača with its hot spot Škocjan Caves** (i.e., more cooperation with the nearby Škocjan Caves, more efficient visitor flow and destination management, increased financial and human resources for the municipality) as Divača does not yet benefit from the high visitor numbers of the caves despite lying on the strong tourist flows route towards the Adriatic, for instance, since it only offers very low numbers of bed spaces and own tourist attractions (neither breaching Divača's carrying capacity nor assessing the carrying capacity of the Škocjan Caves are deemed issues of great importance);
- III. **The need to address the destination management functions and organization** (i.e., more cooperation not only with the Škocjan Caves but also with all other surrounding municipalities to unlock potential spill-over effects);
- IV. **The need to address environmental quality and pollution** (i.e., reduction of pollution, waste, and noise caused by same-day visitors from Italy to the Karst region traveling by car) as the natural environment, including the river Reka, have been suffering from negative developments and bus and railway connections are poor, slow, and infrequent.

In general, more cooperation is deemed necessary to make the visitors of the Škocjan Caves also visit Divača and its surrounding municipalities. More regular financial means are necessary for both the creation of (tourism) infrastructure and the implementation of a common tourism development strategy for the region in cooperation with the local population.

Based on a more recent e-mail from Prof. Tanja Mihalic (July 1st, 2020), the official establishment of the DMO Karst including its financing was reported, thus partially alleviating need III. On the downside, the number of tour guides in Divača had to be reduced from 70 to 7 due to the COVID-19 pandemic.

Pertaining to the single needs in particular, need III is somewhat difficult to address in terms of quantitative indicators due to its qualitative nature. While not explicitly mentioned as important

by the stakeholders, the following indicators that are already available on the dashboard are recommended for the remaining three needs:

- **Need I:** Ageing index, employment ratio, employment, income, natural increase, population density, population, and unemployment (all territorial context indicators);
- **Need II:** Bedspace, bedspace change, bedspace intensity, and enterprises (all territorial context indicators);
- **Need IV:** Waste (territorial context indicator).

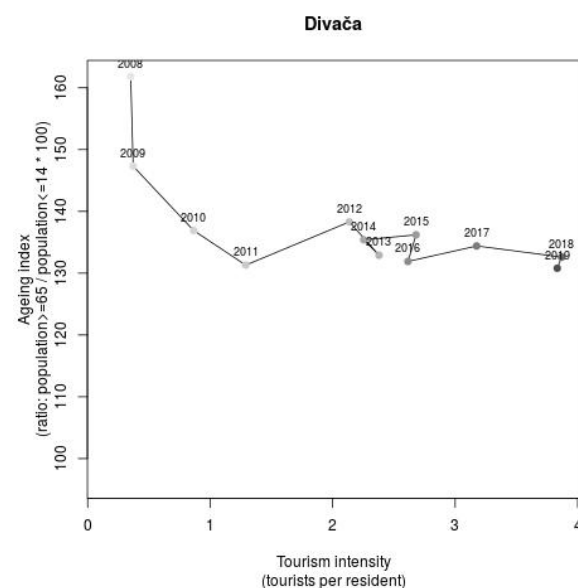
Some of these are employed in an exemplary fashion in the following. Combining tourism and territorial context indicators into tourism impact for the territorial context dimension of the graphs. Any other indicator (pairs) can be easily downloaded from the dashboard and analysed, provided that data are available.

Concerning possible pairs of tourism performance and territorial context indicators to be analyzed jointly, the following suggestions can be made to assess needs I, II, and IV as identified by the stakeholders:

- a) Tourism intensity AGAINST ageing index OR employment ratio OR income → **Need I**;
- b) Arrivals (growth) OR overnights (growth) OR length of stay AGAINST bedspace OR bedspace change OR bedspace intensity OR enterprises → **Need II**;
- c) Arrivals (growth) OR overnights (growth) OR length of stay AGAINST waste → **Need IV**.

All these pairs can be downloaded from the dashboard for Divača for each year. Each point in the following graphs shows the combination of the two selected indicators for the selected municipality through all years available in the database. The darker the grey coloration of the year, the more current its observation. Changes along the horizontal/vertical axis depicts changes on the tourism performance/territorial context indicator.

Figure A.85: Tourism intensity against ageing index

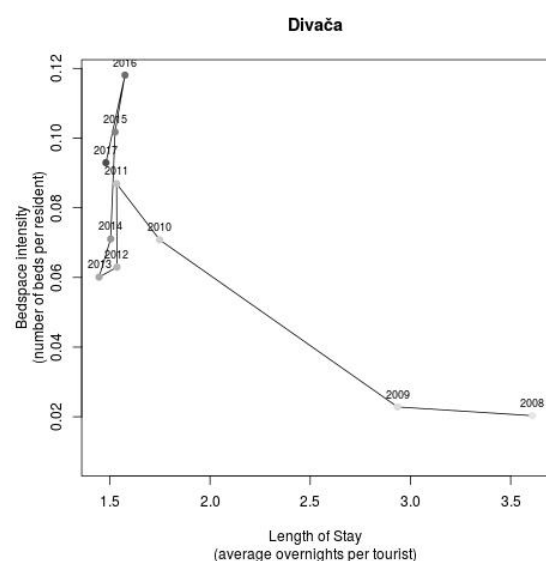


Source: Consortium (2020)

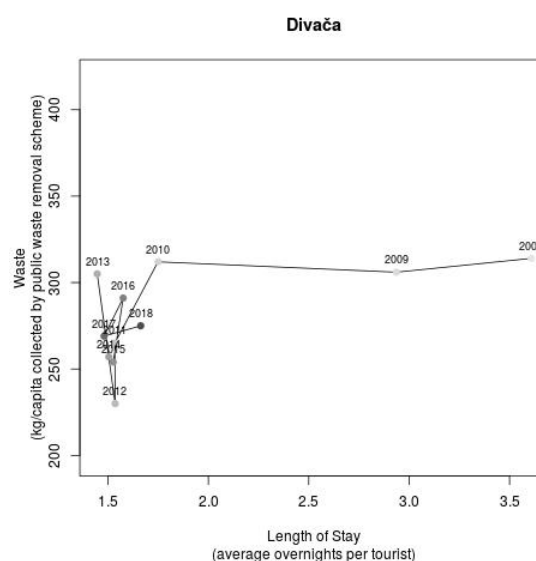
Concerning an example for a), Divača's tourism intensity is plotted against its ageing index from 2008 to 2019 (see Figure A.85). From this graph, one can conclude that while there has been some relaxation in terms of the territorial context dimension over the past decade, carrying capacity has become under increased pressure from a tourism performance perspective.

As an example for b), on the other hand, length of stay (i.e., the tourism performance dimension) has decreased for Divača over the past decade representing increased pressure on Divača's carrying capacity, while bedspace intensity (i.e., the territorial context dimension) has shown some alleviation (see Figure A.86).

Figure A.86: Length of stay against bedspace intensity Figure A.87: Length of stay against waste



Source: Consortium (2020)



Source: Consortium (2020)

Finally, as an example for c), length of stay is plotted against waste (see Figure A.87). While length of stay contributes to the aforementioned increased pressure on Divača's carrying capacity from a tourism performance point of view, waste production in the municipality has hovered around the same values over the observation period. This implies that lower length of stay of tourists has not resulted in increased waste production in Divača. Having a look at the development of arrivals, short trips in particular do not seem to play a big role here.

III.4.2 Interpreting tourism impact with benchmarking

In order to perform benchmarking, the different pairs of tourism performance and territorial context indicators need to be compared to the values from other Slovenian municipalities. In the following, the latest year for which data were available is analysed. Each blue dot in those density graphs represents the combination of the two selected indicators of all municipalities available in the database for the displayed year. The big black dot represents the selected municipality. Red areas highlight dense areas of municipalities, yellow ones are sparsely populated. A municipality located within/outside the red area is similar/different compared to all other to municipalities.

Concerning possible pairs of tourism performance and territorial context indicators to be analysed jointly, the following suggestions can be made to assess needs I, II, and IV as identified by the stakeholders also in a benchmarking context:

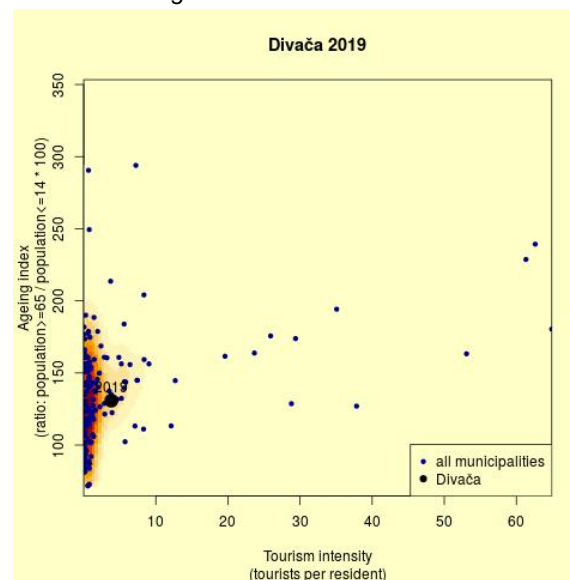
- a) Tourism intensity AGAINST ageing index OR employment ratio OR income → **Need I**;
- b) Arrivals (growth) OR overnights (growth) OR length of stay AGAINST bedspace OR bedspace change OR bedspace intensity OR enterprises → **Need II**;
- c) Arrivals (growth) OR overnights (growth) OR length of stay AGAINST waste → **Need IV**.

To be in line with sub-step III.4.1, the same exemplary pairs of tourism performance and territorial context indicators are presented and discussed.

As an example for a), tourism intensity is plotted against aging index for 2019 (see Figure A.88). As can be seen, Divača cannot be interpreted as a common Slovenian municipality and an ageing population together with increasing tourism intensity imposes some pressure on the carrying capacity of Divača as identified by the stakeholders.

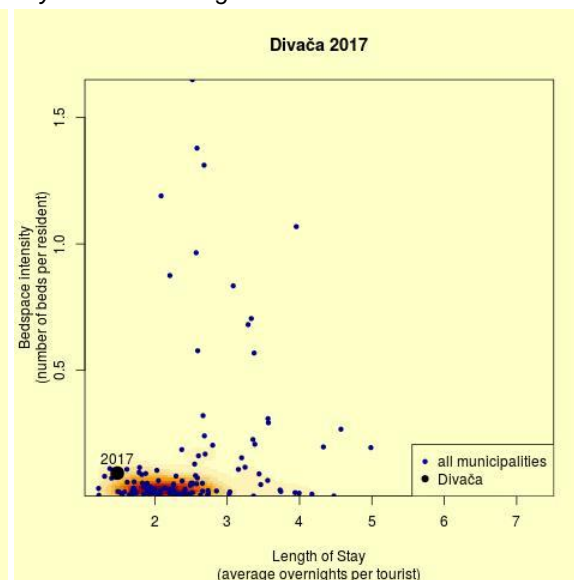
As an example for b), length of stay is plotted against bedspace intensity for 2017 (see Figure A.89). Also, according to this indicator pair, Divača cannot be interpreted as a common Slovenian municipality. Compared to its benchmarks, Divača's bedspace intensity is higher than the national average, while its length of stay is lower.

Figure A.88: Tourism intensity against ageing index – benchmarking



Source: Consortium (2020)

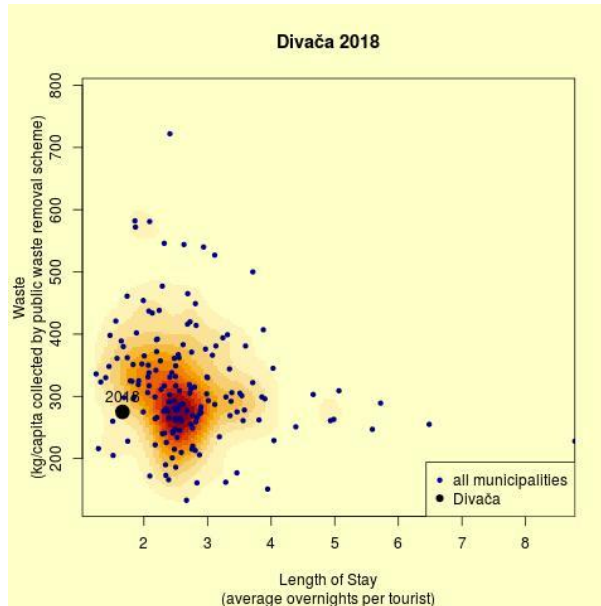
Figure A.89: Length of stay against bedspace intensity – benchmarking



Source: Consortium (2020)

Finally, as an example for c), length of stay is plotted against waste for 2018 (see Figure A.90). Again, Divača's length of stay is below the national average, while waste, more or less, corresponds to the national average. Again, short trips do not dramatically increase the waste burden.

Figure A.90: Length of stay against waste – benchmarking



Source: Consortium (2020)

III.5 Step 5

III.5.1 Carrying Capacity Workshop

Table A.34: Overview of workshop participants

Interviewee name	Institution/organisation	Position
Nataša Matevljič	Razvojni center Divača	Director
Jana Martinčič	Komerciala Parka Škocjanske jame	Commercial director
Irena Iskra Miklavčič	Turistična kmetija Vrbin	Entrepreneur
Mirjam F.Franetič	TKŠD Urbanščica, svetnica, turistična in planinska vodnica	President Tourism and Culture Association and guide
Nataša Macarol,	Odgovorna za turizem občina Divača	Tourism sector
Bogdan Macarol	Predsednik društva turističnih vodnikov Krasa in Brkinov	President Tourist Guide Association
Aleš Vodičar	ORA-skupna DMO	Director
Tanja Mihalič	SEBLU	SEBLU professor
Sabine Sedlacek	Modul University Vienna	Vice-President
Christian Weismayer	Modul University Vienna	Assistant Professor
Bernd Schuh	ÖIR GmbH	Managing Director
Bozana Zekan	Modul University Vienna	Assistant Professor
Ulrich Gunter	Modul University Vienna	Associate Professor

Source: Consortium, 2020

III.6 Outcomes of the Carrying Capacity Workshop

Discussion of the case study specific results

The systemic picture was presented to the participants in a more detailed manner since not many of the participants had attended the first workshop. There was a more detailed discussion about environmental impacts since tourism in Divača is mainly nature-based and built upon the karst, the caves and the landscape. With a constant increase of tourism until 2020, the destination faced pressure since the region is protected under the protection status of UNESCO,

RAMSAR Convention, Natura 2000. With COVID-19, the situation has changed since 80% of tourists are international and therefore the region faced a complete drop out. Also, with COVID-19, domestic tourists compensated the drop to some extent due to the 200 Euro accommodation voucher launched by the Slovenian government. Stakeholders discussed that 90% of all tourists in 2020 are domestic tourists but they are not spending as much as international tourists and they seem to have less information about the region. As a consequence, a lot more interaction with domestic tourists is needed. The discussion touched upon the opportunities of this development where the destination could invest more into visitor satisfaction vis-à-vis residents' satisfaction as a small municipality with only 4,000 residents.

After the selection of indicators was presented and stakeholders have been made aware that not all indicators from their wish list are included in the dashboard, the results for Divača were presented. Stakeholders were extremely interested and contributed a lot to the discussion of each single indicator pair. Stakeholders left the impression that they learned a lot and they were all interested in relating the results to their own working environment and stakeholders also started a dialogue with the other participating stakeholders. The interpretation of the economic and the social impacts was always linked to the environmental impacts since tourism in the destination is dependent on the nature-based elements. The specific situation of the Škocjan Caves with their high protection status falls under the competences of the Slovenian government, which touches upon the question of who is responsible for what and how suitable governance structures and mechanisms can be set up in order to best support the destination. In addition, the new DMO is a new governance actor, which could help to set up coordinated efforts that should also include a wider definition of the destination in order to cope with the carrying capacity challenges.

Discussion about the implications of results

Forum 1: Setting the frame (poster session/mindmapping)

Forum 1 aimed at setting the frame and was structured along the needs. Overall, four needs were addressed and the stakeholders were invited to bring in their experiences with the existing activities.

- **Need I: Need to progress towards sustainability and life quality**

As a follow up of the systemic picture discussion, stakeholders emphasized the importance to integrate the environmental impacts with the socioeconomic impacts. With the Green Scheme approach Divača is following an integrated sustainability approach where the nature-based structure of tourism needs to be complemented with visitor and residents' satisfaction. Residents are often commuters working in other cities like Koper and often across the border in Trieste or other Italian cities. This was perceived as a challenge since residents are not directly connected to local tourism which impacts the identification with the touristic activities. People are not so well connected to the municipality but the social infrastructure costs are relatively high since many young families with children are residents of Divača.

Stakeholders also agreed that job creation outside tourism is needed. Agricultural value added is one opportunity where regional products could be directly merchandised in tourism. Related to that regional identity is something that would need to be developed together. One example might be the “spirit of the place”, where for example the importance of the river Reka for the karst region and therefore water could be the bonding factor.

- **Need II: Need to connect tourism development in Divača with its hot spot Škocjan Caves**

This part of the discussion linked to the specific situation of the **Škocjan** Caves, where the caves park organisation is a unique small entity under the control of the Slovenian government. There are certain responsibility issues between the municipality of Divača and the park organisation that would need better governance structures taking into account the importance of a coordinated development of tourism where for example regional products could be promoted under the regional identity banner. There are some good ideas for example in nuts production which could compensate for the challenges with the plum trees, which are impacted negatively by insects and more and more plums needs to be purchased from Croatia. However, it seems that entrepreneurship is a big challenge since many people in the region produce for example a local juniper-based spirit somewhat related to gin, which is currently internationally sold as a trendy product but they do not officially register their product, which in turn does not allow them to sell it as a high quality product. If these activities should lead to a better regional branding, where culinary experiences (also including locally produced wines, hams, etc.) could be integrated into specific tourist packages than more professional processes would need to be launched. Open questions in the round were: Where do we have to start? How do we have to start? Better education and more specific skills development would be needed.

Another aspect is the one of scale since Divača is relatively small and does not reach a critical mass. Therefore, the new DMO could facilitate a broader regional development process which would help many small destinations in the karst region to overcome their local challenges. This could lead to a “boutique production”, where producers would have a chance to sell at higher prices and tourists would be willing to purchase at higher prices. This seems to be a problem with domestic tourists who are not spending that much money in the destination. But with a coordinated marketing process in the region, which could also be linked to a “workshop” style promotion where producers invite tourists to their production sites, more interest might be generated.

- **Need III: Need to address the destination management functions and organization**

Currently, the newly established DMO is starting to work and to connect its activities with the surrounding DMOs in order to set up cooperation at the regional level. The overall goal is a common development strategy, which should be launched ideally by the end of 2020. The overall tenor of the discussion was the lack of funding and support and the challenge that the DMO would need to find ways to make profit. This is perceived as one of the major challenges since there would be enough potential to set up, for example, processes for skill enhancing activities, like entrepreneurship skills in tourism but there is hardly any financial support available. The

Škocjan Caves do not support the municipality but the DMO. If the **Škocjan** Caves were organized differently, the money coming in could be distributed in a different way. Due to the UNESCO world heritage designation etc., the core caves are completely controlled and disconnected from the local setting. This is organized in a different way in Postojna, where the community around Postojna profits from their local caves. Due to the different competences, the destination Divača sees itself a bit disadvantaged. Therefore, the discussion focused on alternatives, for example, to also develop the Divača Cave in a more touristic way, which is not well developed for such a purpose to date. One scenario could be a small version of a “show cave” with educational programs and events. Such a scenario is more realistic for the less protected Divača Cave. This could be an option to balance the tourist flows. Thus would open the opportunity to spread tourists more evenly in Divača and its surroundings. A model like at Postojna caves where the ticket for the caves is connected with the castle could be a similar scenario for Divača. **Škocjan** caves could help Divača caves to grow and become more popular. **Škocjan** caves finance the lift of Divača caves. One of the main actions of the DMO will be to spread the word of the common product. But it is not fully operational at the moment, especially this year (due to COVID-19), so bigger plans have had to be postponed for the time being.

- **Need IV: Need to address environmental quality and pollution**

In terms of environmental quality and pollution, the discussion started again at the protection level of the Škocjan Caves since a lot of knowledge about environmental issues is bundled at the park organisation and there is already an ongoing support mechanism in place for the Divača Cave, where guides are also working for both caves. Another aspect is a well working tourist flow management in order to disentangle tourists from hotspots and to evenly distribute tourist flows, which would help to balance the carrying capacity.

Moreover, the Green Scheme helps the destination to become more aware in terms of water quality since water quality indicators need to be included into the reporting.

Finally, the newly founded DMO is working on a sustainable transportation strategy, where for example shuttle busses are projected and a concept for e-mobility will be included. There is a need to set up cooperation with hotels, which could support these sustainable transportation ideas. In the past, people had come by train from Ljubljana but this changed over time. Specific packages, where the accommodation sector would cooperate with the DMO, could be offered, maybe in conjunction with organic farming where organic products would nicely fit. However not so many farmers are currently certified.

Forum 2: Discussion of potential actions per destination

In forum 2, stakeholders were asked to go back to each discussed need and to commonly identify what can be done to initiate change and to help the destination to meet the needs.

- **Need I: Need to progress towards sustainability and life quality**

In order overcome the discrepancy of residents being commuters who are not well connected to the municipality, ideas for more common events for families and the municipality were

discussed. Core events could be organized by schools and kindergartens. In addition, more family-oriented infrastructure could be initiated since there is obviously a lack of specific family-based infrastructure. This could also include a better information and communication strategy of the existing associations which seem to be not well known by the families.

More on the business side, tailor-made support mechanisms for start-up and entrepreneurs were brought into the discussion. There is also the EU co-financing option available. When it comes to agricultural support mechanisms, the region has already quite well-coordinated services offered by the LAG (Local Action Group) and the regional development agency.

Finally, the shift from service to “experience economy” was discussed and stakeholders brought in ideas for Divača, which could be used for experience-based tourism. For example, traditional boats – take them to the water, old water mills, railway → facilitated if offered in packages. Boat along the river + food markets + jumping 10 meters from the bridge into the water, etc.

- **Need II: Need to connect tourism development in Divača with its hot spot Škocjan Caves**

In order to better distribute tourist flows, a more coordinated tourism supply is needed and here stakeholders identified the need for regional boards to reach a critical mass. This is also related to the idea of focusing on experience tourism, where sustainability, local food, boutique production, nature, and culture could be relevant keywords. The newly founded DMO, which is also a regional development organisation, could set-up cooperation with farmers and entrepreneurs. What seems extremely important is to build up suitable structures.

- **Need III: Need to address the destination management functions and organization**

The future task for the DMO is to become a facilitator for coordinating all relevant stakeholders and to provide a platform for brainstorming and discussing needs and changes. In order to initiate such activities more support is needed in form of financial and human resources. Therefore, it is important that the DMO becomes an independent economic actor.

- **Need IV: Need to address environmental quality and pollution**

To initiate an awareness raising process for residents in order to bring to their attentions that their community is something special (UNESCO world heritage site). Residents should, in principle, be proud of that designation. There was a common understanding that there would need to be done more, for example an additional benefit for domestic people/residents of the community to motivate them for another visit of the caves (e.g., an event in combination with the entrance to the cave, exhibitions, etc.). This could run under specific themes, like water, species in the caves, minerals/geology, etc. These activities would help to create a stronger identification and awareness and people would take over ownership.

Furthermore, residents need to become more aware that it is their own responsibility to take care of the Škocjan Caves and the river Reka. It is all about making people see this opportunity. One problem discussed is that people might not be interested and it might be that stakeholders are not able to attract especially young people. Already existing activities that can be combined:

schools cooperating with the caves for 15 years to raise awareness (elementary schools); network of universities doing fieldwork in the area → more people from Ljubljana than from Divača (due to Divača being too close).

Table A.35 provides an overview of the discussion of Forum 1 (left column) and Forum 2 (right column).

Table A.35: Overview of the discussion in Forum 1 and 2 Divača

(1) Need to progress towards sustainability and life quality	What can be done?
The environment is only one component. Stakeholders would like to see a more integrated approach.	
The destination has lots of residents working in other cities e.g. Koper, Trieste etc. (commuting problem). These commuters do not have a direct connection to local tourism (they are not involved). This leads to a lack of integration (increasing costs of social infrastructure)	Organizing more common events for families and the municipality (→ kindergarten, schools) Providing more family-oriented infrastructure (lack of offers) Provide more information about associations
A need for job creation outside tourism which would lead to value added in agriculture/products. In order to success here more cooperation at the regional level is needed.	Support for business creation At the regional level: EU co-financing options (→ more information would be needed) Agriculture: LAG & regional development agency cooperate already but this could be better coordinated.
The "spirit of the place" in the context of the Karst region needs to be defined by regional stakeholders together which would lead to regional identity [e.g. the river Reka ≙ water ≙ bonding factor]	A focus on experience based tourism, e.g. use traditional boats and bridges, water mills water + regional products (this refers also to need 2)
There are currently responsibility issues between municipality and the caves park organisation (= unique entity/= small) existing. There is a need to address these governance issues (→ also refers to need 2)	
(2) The need to connect tourism development in Divača with its hot spot Škocjan Caves	What can be done?
The value of regional products: e.g. nuts production new ideas in order to compensate for the environmental problems with plumbs in the region [plumbs → insects harm trees]	To establish regional boards for coordination efforts. Refers also to need 1 where experience tourism has been suggested. Regional products: organic farming (see also need 4), "boutique production" Regional Development Organisation/Destination Management Organisation (DMO) Cooperation with farmers, entrepreneurs etc.
There is a Gin production in the region but farmers do not have official licences. There is a burdensome bureaucracy involved which prevents farmers in applying for official licenses. This leads to the problem that these products cannot be marketed and used. Many open questions: where to start? how to start?*	Building up structures
Municipality is too small scaled in the area of tourism (→ question of critical mass)	
Awareness raising for young entrepreneurs to see opportunities to create new products/services in relation to tourism*	
Small initiatives which direct into the direction of "boutique production" where products could be sold at higher prices. Stakeholders identified a lack of spirit on the side of the producers	Further efforts to develop "boutique production"
* matter of education and skill development	

(3) Need to address the destination management functions and organization		What can be done?
DMO is already established and links to other DMOs are also initiated and established.		DMO must become a platform bringing all stakeholders together for brainstorming and discussing needs and changes (→ catalyst for change)
At the moment structures are under development and first activities are launched. Amongst others a common development strategy by the end of the year 2020.		More support is needed: especially financial resources, human resources DMO has to become an independent economic actor
Education and skill development		DMO should offer seminars/workshops
A proper governance structure needs to be developed. Opportunities for pre-financing projects (public money) At the municipality level there are not enough resources available for tourism The caves park organisation is a public agency. Therefore all revenue flows back to Ljubljana.		
(4) Need to address environmental quality and pollution		What can be done?
Škocjan Caves (SC) are protected by UNESCO WHL, RAMSAR etc. SC are managed by a public agency reporting to the national level. (governance structure limits local and regional cooperation)		Every citizen/resident should be proud to have SC but there should be a common effort in defining the carrot, for example for events free entrance or organising specific family events Offer of specific themes: water, species in the cave, minerals/geology
SC is a knowledge holder and supports Divača cave (e.g. guides are working there etc.). This could be maybe extended to specific packages, e.g. culinary packages of the DMO (problem: lack of financial support)		All these activities would create identity and awareness and people would develop ownership. However it seems hard to motivate/activate residents.
A need for a proper tourist flow management		
Monitoring water quality (Green Scheme)		
A sustainable transport strategy is under way e.g. e-mobility → need to develop cooperation with hotels		
Potential for organic farming but everything would need to be developed		
SC park cooperates with schools		Extend this cooperation to residents and families

III.6.1 Formulation of policy recommendations

The policy recommendations are based step 1-5 in the methodology and have to be seen as the overarching product of the methodology.

The case study Divača is a very interesting one since there are different governance levels involved but there is hardly any coordination existing. The contribution of stakeholders in the workshop was outstanding and the effect of the workshop was visible – stakeholders saw a chance to start a dialogue and to express their own stances and compare them with other stakeholders' views. It also became clear that the newly established DMO will have a core role and act as a facilitator for future sustainable tourism and socioeconomic development.

The analysis of Steps 3 and 4 pointed out clearly, where the destination would need to become more active. The presentation of the indicator pairs was perceived as very helpful and it immediately initiated an intense discussion process. Stakeholders in their different functions argued from their institutional perspectives and tried to understand the point of view of other stakeholders. The results of the data analysis were clearly used for starting a communication process.

Stakeholders asked quite a lot of questions and tried to understand how the destination's carrying capacity could be improved.

The main conclusion for the destination is clearly that there is a strong need for better communication and coordination between the different stakeholders often at different spatial levels, for instance the national level with the **Škocjan Caves park, the regional level, and the local level**. This leads to the following policy recommendation:

To establish a platform for stakeholders to directly communicate and to initiate projects for the destination and the surrounding region. The newly established DMO could take over the role of a facilitator launching different processes with the involvement of different stakeholders.

Another important conclusion from the workshop discussions is that the destination needs to become aware of the different experiences that the region offers for visitors and residents. There is a lot of potential to educate and train both residents and visitors to see the natural beauty as a regional peculiarity. Especially due to COVID-19 pandemic, stakeholders identified the need to activate common forces to connect and coordinate efforts. This leads to the following policy recommendation:

To define regional identity on the basis of Karst tourism and to create specific experience-based products for tourists and visitors alike.

Stakeholders concluded that one of the weaknesses in the destination is a lack of existing interlinkages between tourism and other sectors, which in turn leads to a lack of identification of residents with tourism products, a lack of knowledge of existing products on the side of non-residents as well as a lack of entrepreneurial ideas for tourism. This leads to the following policy recommendation:

To foster a stronger integration of the tourism sector with other sectors (e.g. local farmers), where local (e.g. organic, sustainable) agricultural products could be integrated into the experiences, in order to make them better known for non-residents and to foster entrepreneurship.

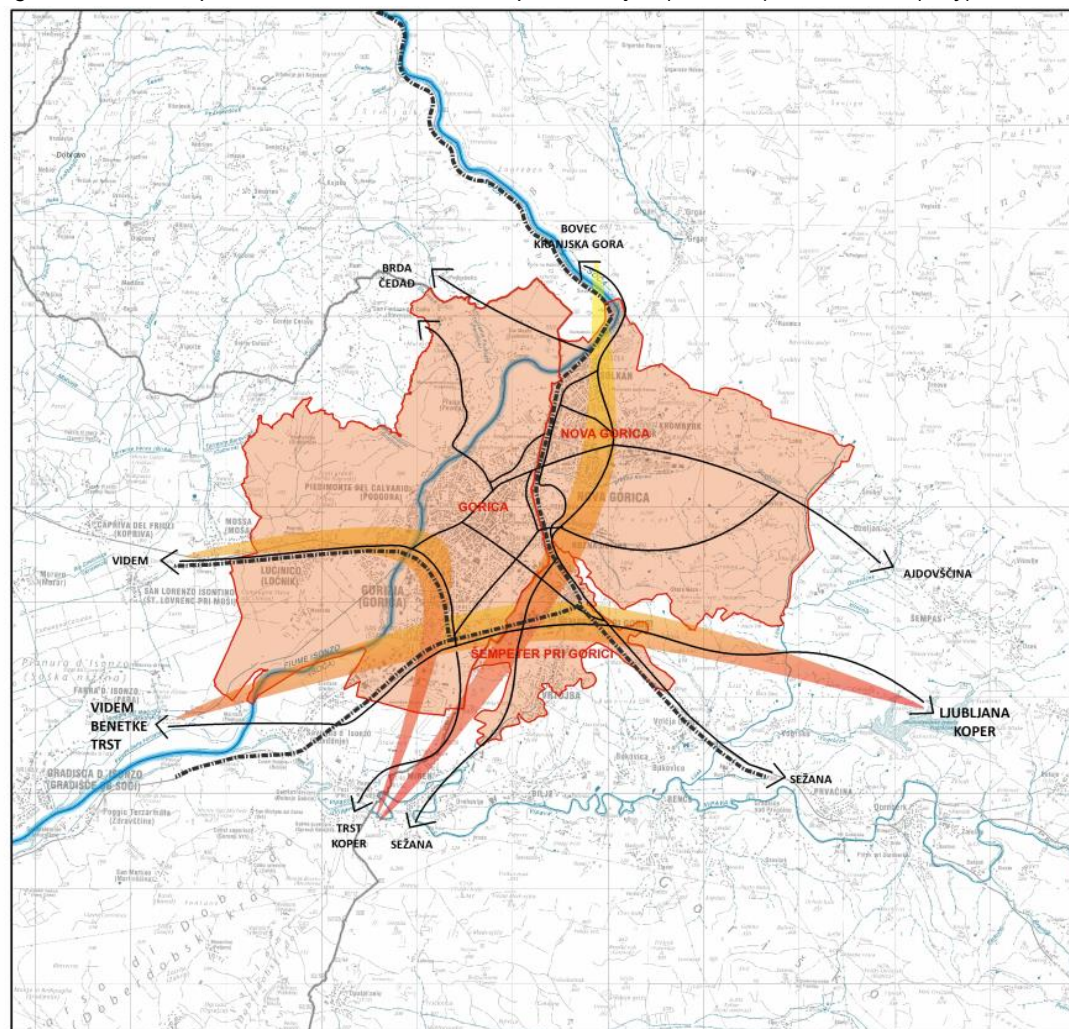
IV Case study Gorizia – Nova Gorica

IV.1 Step 1

IV.1.1 Overall context

The case study is dedicated to the cross-border city Gorizia – Nova Gorica which is characterized by a cross-border urban agglomeration with the two municipalities Gorizia in Italy and Nova Gorica in Slovenia, as illustrated in Figure A.91.

Figure A.91: Municipalities Nova Gorica and Šempeter-Vrtojba (Slovenia), and Gorizia (Italy)



Merilo 1 : 120 000 | Viri TK50, GURS I DMR, GURS I Locus d.o.o., 2015

Legenda

Vsebina

- območje EZTS
- Soča
- prometne osi
- železnica
- prometne povezave

Podlaga

- državna meja
- upravičeno območje TUS

Source: MONG, 2016.

Even though the two cities appear as one territorial unit, the case study is a cross-border case study of two independently developed destinations. Especially the tourism development in

Nova Gorica is shaped by a very specific and for Slovenian destinations atypical development process and organization. There was no destination management organization (DMO) involved in developing the destination, which led to shortcomings after Slovenian destinations were selected as “leading destinations” in the Strategy for Sustainable Growth of Slovenian Tourism 2017-2021 (see more details under the destination definition Nova Gorica).

Gorizia was facing a turbulent history after belonging to the Austrian empire (1815-1918) and after World War I being assigned together with the western part of Slovenia to Italy. Finally, the city was divided after World War II in 1947 (Gorizia in Italy and Nova Gorica in Slovenia) and the train station and some other parts of the city were reallocated to Yugoslavia. After Slovenia’s EU accession in 2004 (and Schengen in 2007), the hard international border and border controls were removed in this cross-border city area, but the two names Gorizia and Nova Gorica remained. The square next to the train station (Italian: Piazza Transalpina; Slovenian: Trg Evrope) marks the former hard borderline and has also two different names. The historical development has strongly influenced the identity of the cross-border city, its residents and therefore the understanding and definition of the two destinations.

Figure A.92: The landmark indicating the international border between Italy and Slovenia on Piazza Transalpina/Trg Evrope in Gorizia – Nova Gorica



Source: TU Wien Future Lab (<https://www.futurelab.tuwien.ac.at/blog/category/nova-gorica/>)

The cross-border case study of Gorizia – Nova Gorica is the most complex case in this project as the two cities and their stakeholders act in terms of the destination development in two different organisational and marketing realities. The project defines the case-study as a cross-border destination and tries to identify the potentials and challenges for the stakeholders in the two cities. The interviews and the workshops identified quite a lot of commonalities in terms of the stakeholders’ perception of the cross-border aspects but with different foci. In Nova Gorica stakeholders see a potential for cross-border cooperation but they do not see it as one destination, whereas in Gorizia stakeholders see the potential for cross-border cooperation and define the city already as one destination with a rich hinterland offering in both countries.

Thus, even though the city appears as one spatial entity, the stakeholders across the border perceive the destination differently. The Slovenian stakeholders defined the destination in the interviews as Nova Gorica, which covers the area of the City Municipality Nova Gorica⁸ (Mestna občina Nova Gorica, MONG). The Italian stakeholders, in turn, defined the destination Gorizia – Nova Gorica as a cross-border destination which has a great potential due to the two surrounding regions. However, the Italian stakeholders also emphasized that this great potential is not used yet. It has to be added that the Slovenian and the Italian stakeholders were not able to discuss their own definitions in a common workshop due to the outbreak of the COVID-19 pandemic and the resulting comprehensive lockdown in early March 2020. Since the destination was defined differently, the following paragraphs will provide separate overviews about the situation in the case study destination.

Gorizia

The Gorizia (GO) province (NUTS3: ITD43/LAU code: 031007), is located in North East Italy (NUTS1: ITD) – within the Autonomous Region Friuli-Venezia Giulia (NUTS2: ITD4) at the Slovenian border. Friuli-Venezia Giulia is comprised of four provinces (Pordenone, Udine, Gorizia, and Trieste). The province of Gorizia is comprised of the following municipalities (municipalities surrounding Gorizia city are underlined for a broader definition of the region): Capriva del Friuli, Cormons, Doberdò del Lago, Dolegna del Collio, **Farra d'Isonzo**, Fogliano Redipuglia, Gorizia, Gradisca d'Isonzo, Grado, Mariano del Friuli, Medea, Monfalcone, Moraro, **Mossa**, Romans d'Isonzo, Ronchi dei Legionari, Sagrado, San Canzian d'Isonzo, **San Floriano del Collio**, San Lorenzo Isontino, San Pier d'Isonzo, **Savogna d'Isonzo**, Staranzano, Turriaco, and Villesse.

How is the destination defined and perceived?

As pointed out earlier, the Italian stakeholders defined the destination Gorizia – Nova Gorica as a cross-border destination which has a great potential due to the two surrounding regions. However, from an Italian destination point of view, the city of Gorizia is part of the Italian destination management and marketing and is promoted by the destination management organization (DMO) PromoTurismo FVG as any other destination in the region Friuli-Venezia Giulia (FVG). There is a tourism information agency located in Gorizia.

The cross-border city is today a focal point of cross border activities but in the past, common developmental projects were rather an exception; the same was applicable to any attempt of joint promotional activities and collaboration. Stakeholders articulated that the overall area does not have a strong dependency on tourism and currently is in no danger of exceeding its carrying capacity. Thus, no major tourist flows and no negative impacts of tourism (e.g., traffic congestions, pollution) can be reported yet. According to the interviewed stakeholders, one important attraction is the railway station of Nova Gorica that is located right beside the famous Piazza Transalpina/Trg Evrope, also called Europe Square at the Slovenian-Italian border, which does

⁸ ISO 3166-2:SI code for Nova Gorica is SI-084.

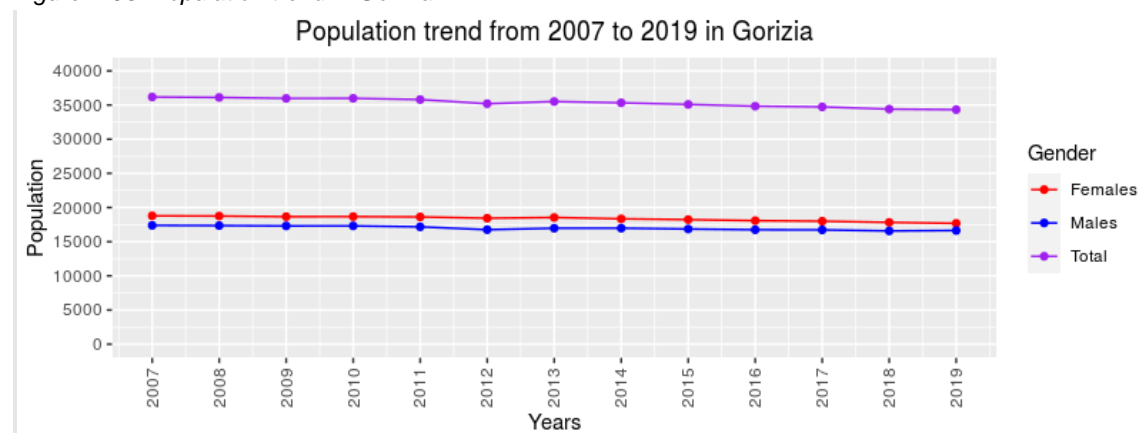
not keep many tourists in either of the cities, but rather only day visitors who are driving through on their way to Bled, for instance.

Stakeholders emphasized that this is also in line with the limited (yet currently sufficient) offer of accommodation options: hostels and B&Bs are more common on the Italian side, whereas bigger hotels can be found on the Slovenian side. Another discouraging factor is that the demographic picture of Gorizia is changing due to many young people leaving after having completed their studies as the employment opportunities they have at home are limited. This had led to a further closure of various shops and resulted in keeping the (tourist) infrastructure at minimum.

Population trend

The population of the municipality of Gorizia counts 34,336 (2019) residents, while the province with the same name 139,403 (31st December 2018). Gorizia city's density is of 832.1 inhabitants per km² (2018) while the province holds 299 inhabitants per km² (31st December 2018). The city spreads over 41,2632 km², while the province over 466.02km². The municipality of Gorizia reflects the national Italian trend of an ageing population and a steady economic struggle. The average age is 48.1 (rank 2,109 among the 7,914 municipalities in Italy). Data show a slow but constantly decreasing population trend in the municipality of Gorizia.

Figure A.93: Population trend in Gorizia



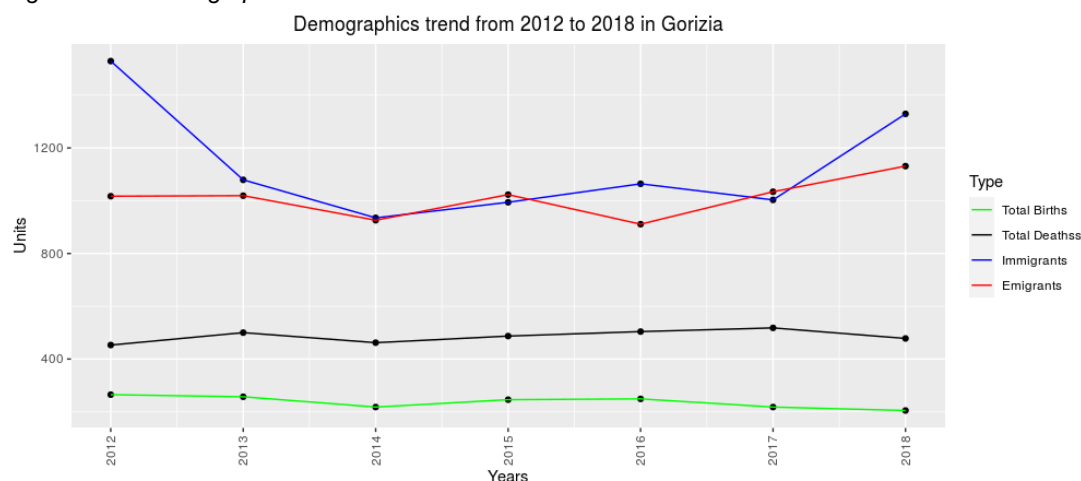
Source: Italian National Statistics Institute Open Data

All data is based on the municipality General Register Office. In 2011, there was a census and the data were confronted with the registers and, as such, 2012 is the year where the data were checked. This discrepancy that appears in the graph (Figure A.93) was explained by the fact that some people emigrated elsewhere and did not cancel their residency. This means that the real number of residents measured by the census is lower than the one found in the registers. Either way, the interpretation of the situation does not change.

Demographics

The total number of deaths over time exceeds the number of births. The former has a slightly increasing trend while the latter a decreasing one. The immigrants to emigrants ratio does not compensate for the discrepancy between births and deaths.

Figure A.94: Demographic trend in Gorizia

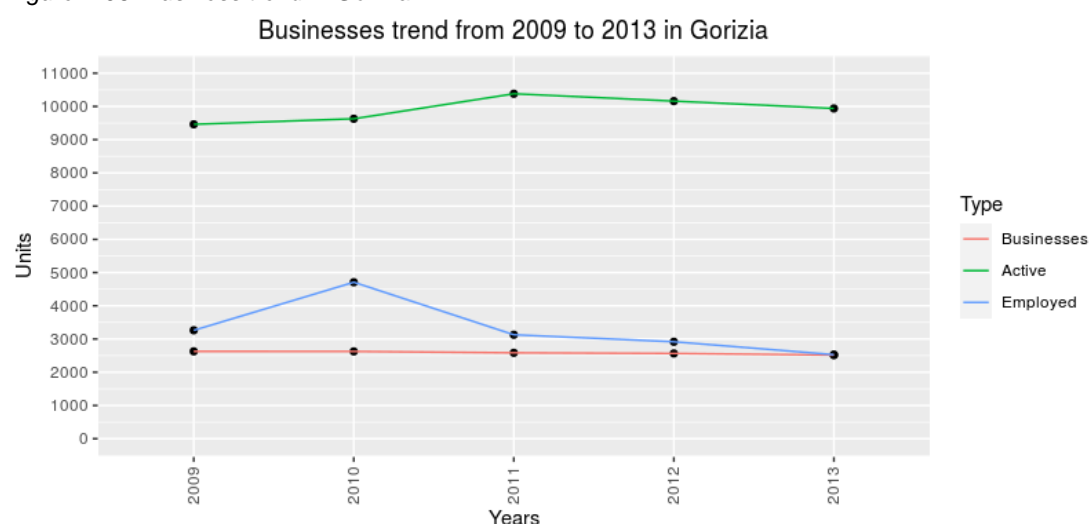


Source: Demographics Italian Database of the Italian National Statistics Open Data

Businesses trend

The business development in Gorizia is characterized by a slow but steady decrease in absolute numbers (2009: 2,629; 2013: 2,517). Although this is just a four-year glimpse, the trend is downwards.

Figure A.95: Business trend in Gorizia



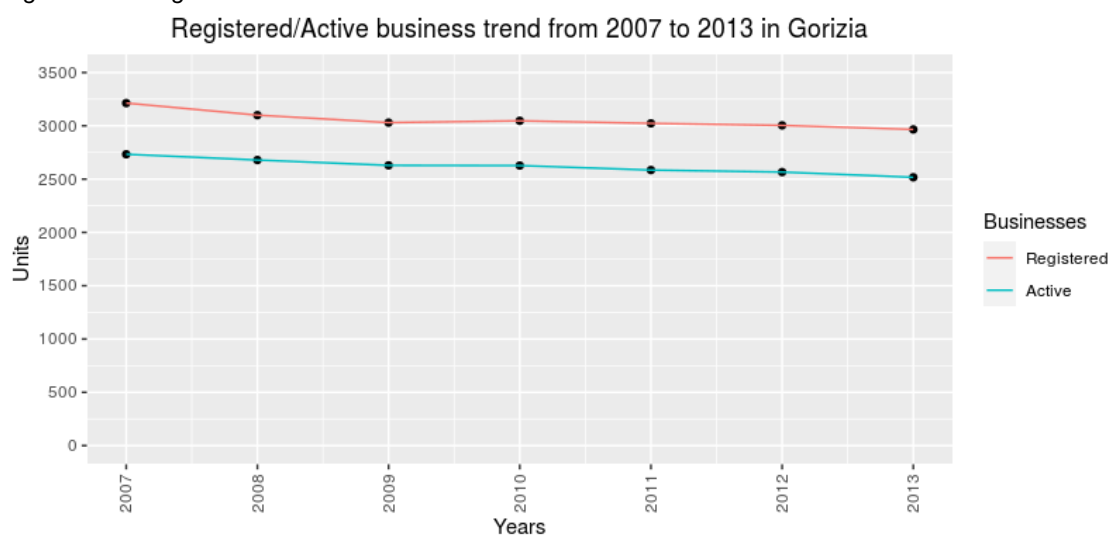
Source: Italian Chamber of Commerce Open Data

Between 2009 and 2010, more people were employed due to governmental laws to defeat the 2008 economic crisis; employers were facilitated to hire personnel but after that, the number of newly employed people and those who were actively working kept on decreasing.

Registered/active businesses

There is also a discrepancy between the registered businesses and the active ones, meaning that there are less businesses active than the ones registered as such. The descending trend over a seven-year span is also noticeable.

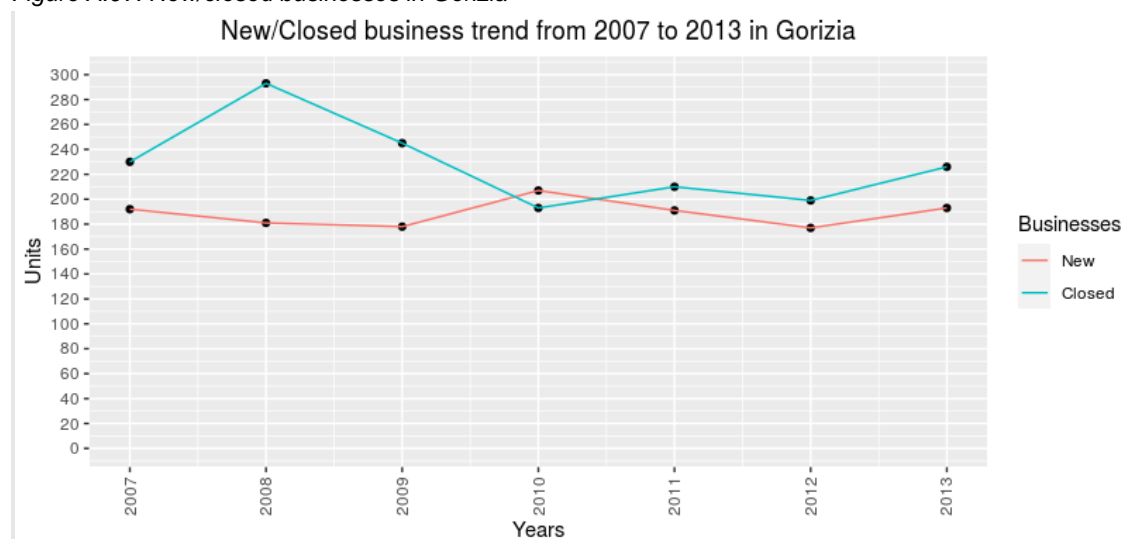
Figure A.96: Registered/active businesses in Gorizia



Source: Italian Chamber of Commerce Open Data

Besides that, the number of businesses that had been closed exceeds the number of newly founded businesses within the same period, which is an indicator for a rather stagnant business location. After the financial crisis in 2008, more than 100 businesses closed, which affected the business location negatively. In 2009 and measured in 2010, again the government created an environment to encourage opening of new businesses, but these laws were not as successful as intended since after 2010 a reverse trend is visible. Altogether, Gorizia did not fully recover from the economic crisis in 2008, which has also impacted tourism-related businesses negatively.

Figure A.97: New/closed businesses in Gorizia

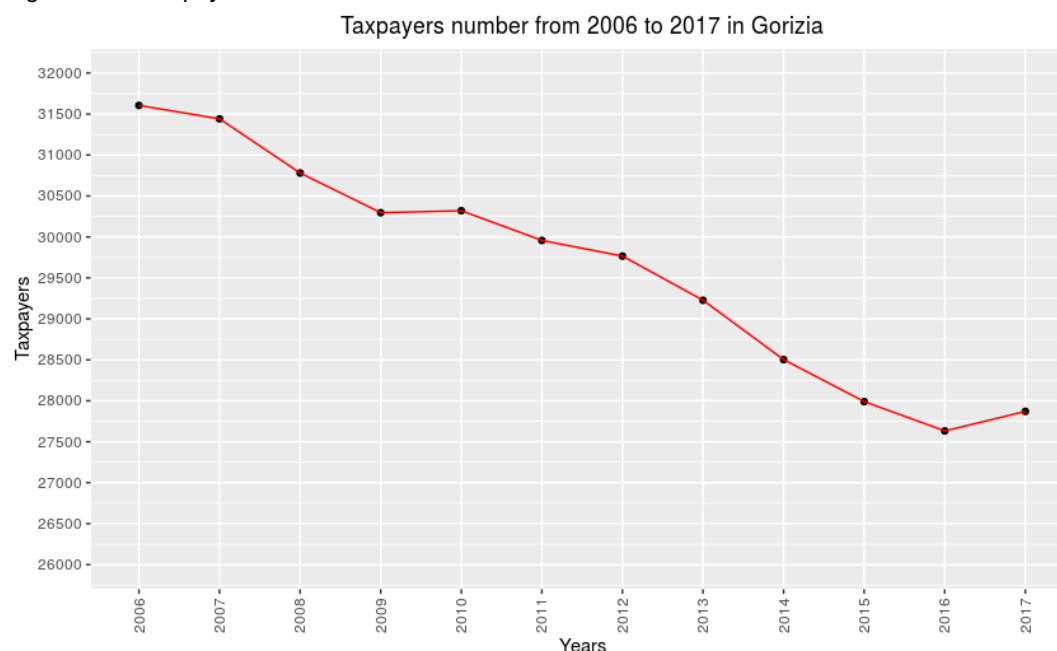


Source: Italian Chamber of Commerce Open Data

Taxpayers

The number of the contributors declaring their income follows the general descending trend. A decreasing number of residents is coherent with a decreasing number of income declarations.

Figure A.98: Taxpayers in Gorizia



Source: Italian Chamber of Commerce Open Data

Tourism statistics

In 2019, 24,353 domestic and foreign tourists arrived at Gorizia spending 51,489 overnight stays altogether (all annual data for 2019 include observations until November 2019 only). This resulted in an average duration of stay of 2.1 nights. While this number was approximately the same for all tourists (2.1 nights for domestic tourists and 2.2 nights for foreign tourists, respectively), with 74% of arrivals and 73% of overnights, the domestic Italian market consisted by far the most important source market of Gorizia. Although the average duration of stay rose slightly from 2017 to 2018, the share of domestic tourists has been equally high in the past, with domestic overnights representing “only” 69% of all overnights in 2018 being somewhat of an exception. Given the shortness of the time series, it is, however, not possible to judge whether this was a one-off effect or not. Table A.36 can be consulted for more detailed numbers on the overall development from 2017 to 2019.

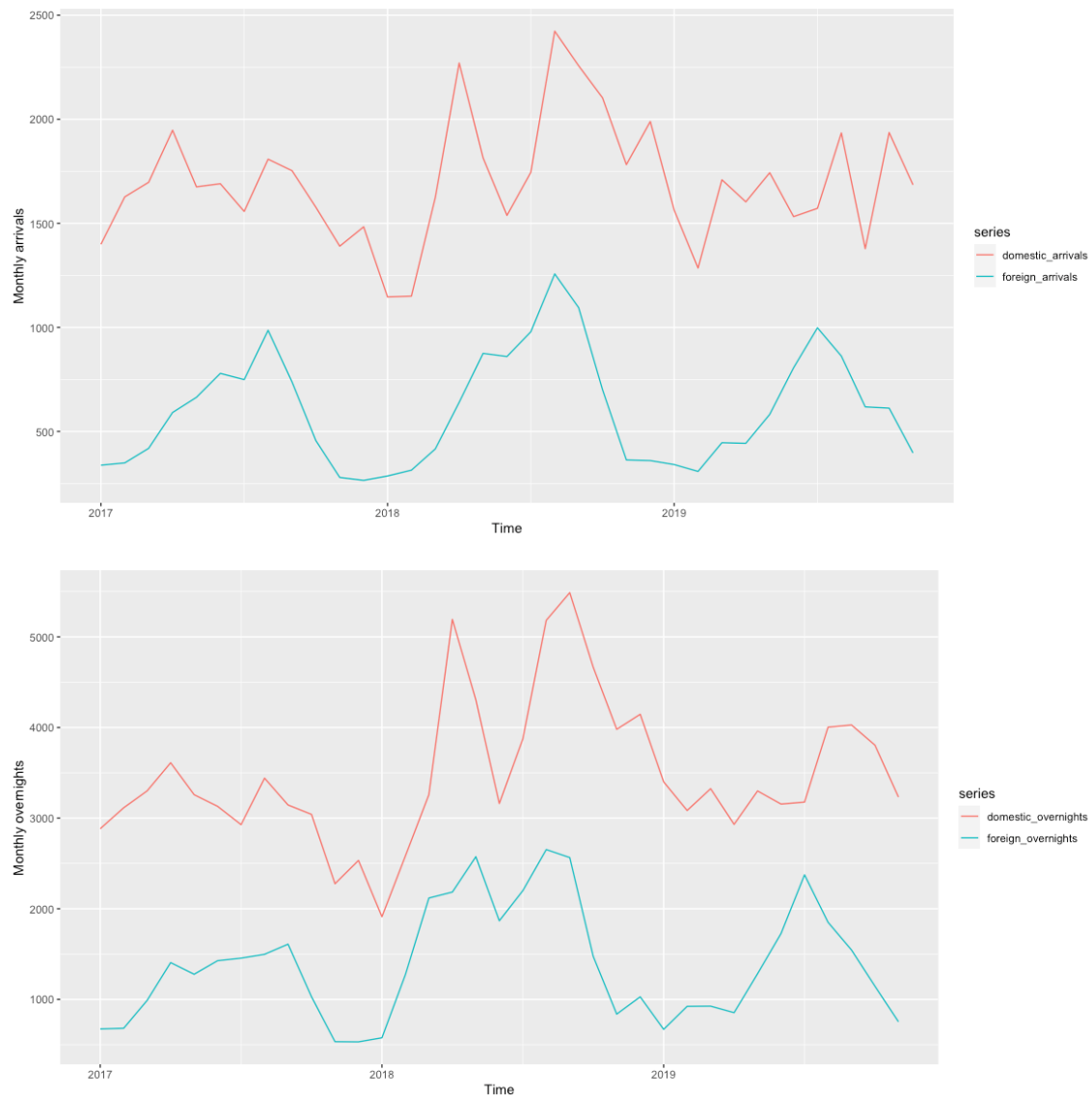
Table A.36: Tourist arrivals and overnight stays in Gorizia from 2017 to 2019

	Tourist arrivals 2019 (until 11/2019)	Overnight stays 2019 (until 11/2019)	Tourist arrivals 2018	Overnight stays 2018	Tourist arrivals 2017	Overnight stays 2017
Countries – Total	24,353	51,489	29,987	69,097	26,216	49,769
Domestic	17,940	37,441	21,841	47,749	19,603	36,662
Foreign	6,413	14,048	8,146	21,348	6,613	13,107

Source: Insiel, Regione Autonoma Friuli Venezia Giulia.

As can be seen from Figure A.99 for monthly arrivals and overnights, there was a peak in both tourist arrivals and overnight stays in 2018, representing a growth rate of +14% for arrivals from 2017 to 2018 and a growth rate of +39% for overnights from 2017 to 2018, respectively, whereby the latter number was largely influenced by a sharp increase in foreign overnights. Even though data for December 2019 are missing, the peak of 2018 did not seem to have been reached again in the year after.

Figure A.99: Monthly tourist arrivals and overnight stays in Gorizia from 2017 to 2019

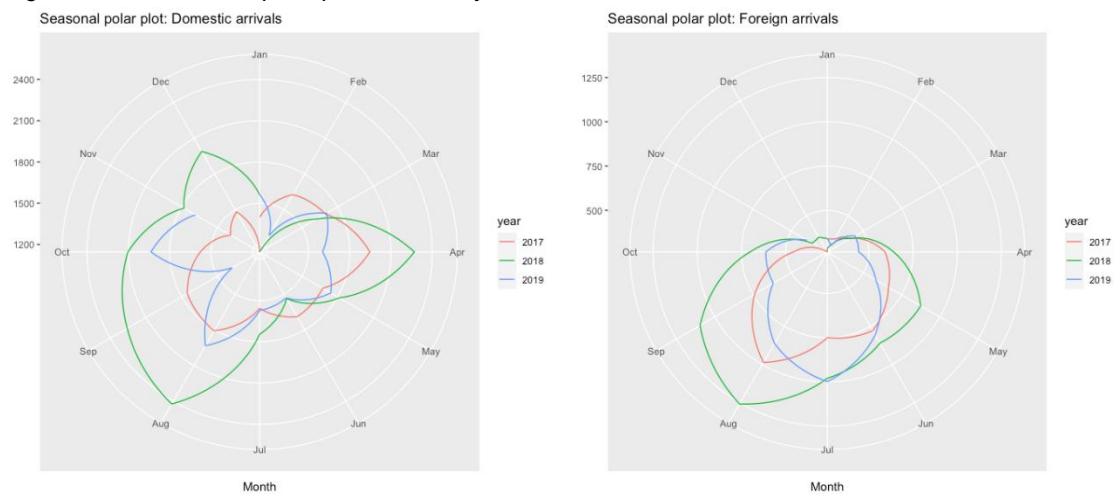


Source: Insiel, Regione Autonoma Friuli Venezia Giulia, and Consortium.

Besides the aforementioned peak in 2018, also seasonal patterns are visible for both arrivals and overnights from the above graph with some similarities between domestic and foreign tourists. A more detailed inspection in terms of a seasonal polar plot of domestic and foreign arrivals (see Figure A.100) reveals that for domestic tourists, the months of August to October and, to a lesser extent, also April and December could be considered high season, at least in 2018.

For foreign arrivals, in turn, the months July to September and, to a lesser extent, also May to June could be considered high season in 2018.

Figure A. 100: Seasonal polar plot for monthly tourist arrivals in Gorizia from 2017 to 2019



Source: Insiel, Regione Autonoma Friuli Venezia Giulia, and Consortium.

Nova Gorica

Destination definition

The destination Nova Gorica, as defined in the interviews for the needs of the project, covers the area of the City Municipality Nova Gorica⁹ (Mestna občina Nova Gorica, MONG).

However, the destination in the tourism market functions at different levels, which is explained as follows:

Until recently (2019), tourism at the destination level in the City Municipality Nova Gorica has been organised through the Tourist Association of Nova Gorica. This non-governmental civil organisation performed destination management and product development roles for the area of the City Municipality Nova Gorica, which are not otherwise typically managed by tourist associations as non-government entities in other Slovenian destinations. The organisation also led the process of entering the Green Scheme of Slovenian Tourism and acquiring the certificate Slovenia Green destination – Gold for the City Municipality Nova Gorica.

The shortcomings of the fact that the destination had no professional and competent DMO function had been made very clear in the recent few years, especially with the new organisational system of Slovenian tourism, as defined by the Strategy for Sustainable Growth of Slovenian Tourism 2017-2021 (MGRTRS, 2017). The strategy defined and assigned the status of so-called “leading destinations” to 35 Slovenian destinations altogether. The “leading destination” status was given to Nova Gorica, together with Vipava Valley. The wider destination as defined in the strategy (MGRTRS, 2017) is, besides the City Municipality Nova Gorica,

⁹ ISO 3166-2:SI code for Nova Gorica is SI-084.

comprised by the municipalities of Renče-Vogrsko, Ajdovščina, Vipava, Šempeter – Vrtojba and Miren – Kostanjevica (six altogether). This wider understanding of the “leading destination” had been promoted and supported by the tourism and other stakeholders in the area.

It needs to be noted that Vipava Valley (the above stated six municipalities) had started developing joint tourism activities before that, around 2016, when partners prepared an umbrella marketing brand identity Vipava Valley and a web portal (www.vipavskadolina.si/en/). The partnership was at that time not organised as a formal entity. One of the six municipalities (Miren – Kostanjevica) then founded their own DMO and started to cooperate more actively with the Karst region (municipalities of Divača, Sežana, Komen, and Hrpelje – Kozina). Therefore, the City Municipality Nova Gorica attempted to establish a joint DMO with the remaining four municipalities, but in the end the new Public Institute Nova Gorica and Vipava Valley was founded only by three municipalities in 2018: Nova Gorica, Ajdovščina, and Renče-Vogrsko. Others have not joined so far. This organisation now manages the destination Nova Gorica and Vipava Valley (the area of three municipalities), but marketing-wise the DMO defines and promotes the destination as the whole Vipava Valley. The reason behind this is that it is logical from a geographical point of view, as well as from the perspective of a visitor.

Destination location

The City Municipality Nova Gorica lies in the western part of Slovenia, along the border with Italy (Figure A.91, above on the left). It is a part of wider destination Vipava Valley (Figure A.101, below on the left). The municipality is divided into 19 local communities with 44 settlements (of which five are in the urban area and 39 in the countryside). The neighbouring municipalities are: Brda, Kanal, Tolmin, Idrija, Ajdovščina, Komen, Miren – Kostanjevica, Šempeter – Vrtojba, Renče – Vogrsko, and Gorizia (Italy).

Nova Gorica is a part of Goriška Statistical region¹⁰ (Figure A.101, right), comprised of 13 municipalities: Ajdovščina, Bovec, Brda, Cerklje, Idrija, Kanal, Kobarid, Miren – Kostanjevica, Nova Gorica, Renče – Vogrsko, Šempeter – Vrtojba, Tolmin, and Vipava. It is the largest municipality in the Goriška Statistical Region. The municipality size changed in 1998, when the area was divided and Municipality Šempeter – Vrtojba was founded as an independent municipality (with 15 km² it is one of the smallest municipalities in Slovenia).

Nova Gorica is a part of the Mediterranean & Karst Slovenia, one of the four tourist “macro destinations” in Slovenia, as defined by the Strategy for Sustainable Growth of Slovenian Tourism 2017-2021 (MGRTRS, 2017); presented in Figure A.102 (left). Within the Mediterranean & Karst Slovenia, Nova Gorica and Vipava Valley is one of seven “leading destinations”, which are defined as key subjects of Slovenian tourism at the level of individual destination (Figure A.102, right).

¹⁰ NUTS-SI04 (Western Slovenia): SI043 – Gorizia/Goriška Statistical Region.

Figure A.101: Maps showing the City Municipality Nova Gorica and the position of Vipava Valley in Slovenia (left), and Goriška region

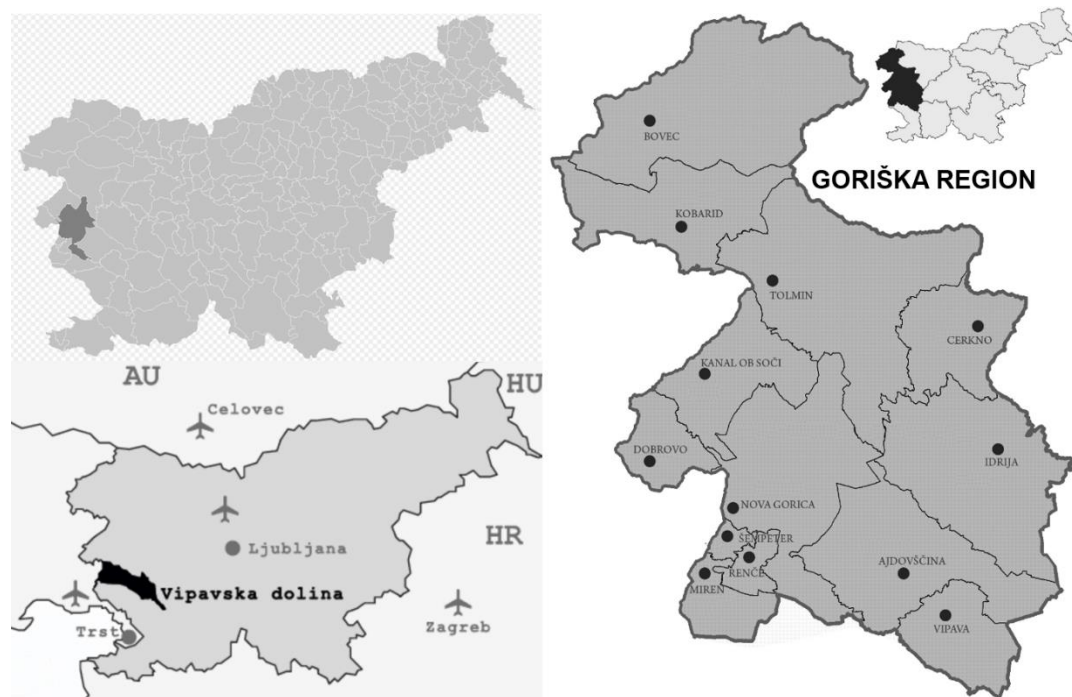
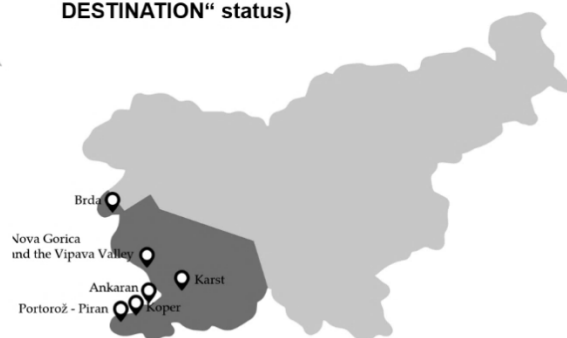


Figure A.102: Map showing the 4 regions of Slovenia and position of Nova Gorica and Vipava Valley in Mediterranean & Karst Slovenia

4 MACRO DESTINATIONS (TOURIST REGIONS) OF SLOVENIA



MEDITERRANEAN & KARST SLOVENIA (with destinations, which have a „LEADING DESTINATION“ status)



Source: STO, 2020.

Since May 2011, Nova Gorica has been joined together with Gorizia (Comune di Gorizia) in Italy and Šempeter – Vrtojba in a common trans-border metropolitan zone, administered by a joint administration board European Grouping of Territorial Cooperation (EGTC GO/EZTS GO). The EGTC GO was established to identify and cope with common challenges in order to strengthen the cross-border territory.

In more detail, the strategic plan of the EGTC GO was adopted through a joint effort that involved also citizens and experts in many fields such as transportation, energy, healthcare,

culture and education, city planning, and sport. The strategic plan is based on three pillars: (1.) Promotion of the tourism heritage and cross-border natural resources; (2.) Sharing of health services; (3.) Gorizia – Nova Gorica-Šempeter Vrtojba railway line. The common trans-border metropolitan zone covers 73,750 inhabitants in a 365 km² area.

Socio-economic situation of the municipality and the region

Nova Gorica is one of the eleven city municipalities of Slovenia and the seat of all the major regional institutions (the condition to acquire this status is the threshold of 20,000 residents and 15,000 working places).

The population is currently 31,691 (which ranks Nova Gorica 9th among Slovenian municipalities). The population density was 113 people per square kilometre, which was higher than the national average of 102 people per square kilometre, and high above the regional average of 55.5. The Goriška statistical region had 6% of Slovenia's population in 2018. It is the second least densely populated region. The municipality faces stagnation of population and above average aging. It measures 280 km² (which represents 12% of Goriška Statistical Region and 1.4% of Slovenia), which ranks it 10th among Slovenian municipalities.

Among people aged 15–64 (i.e., working age population) about 66% were persons in employment (i.e., persons in paid employment or self-employed persons), which is more than the national average (65%). In Nova Gorica, average monthly gross earnings per person employed by legal persons were about 1% lower than the annual average of monthly earnings for Slovenia; and net earnings the same as the national average. 17% of the employed population in the region worked outside the region of residence. Only two regions had lower rates, namely Podravska (16%) and Osrednjeslovenska (10%).

In 2018, 454 kg of municipal waste per person was collected in Nova Gorica, which is 93 kg more than on average in Slovenia and less than in the region (in 2018, 535 kg of municipal waste per capita was generated, which was 40 kg over the national average; 67% of municipal waste was collected separately). Households in the region were supplied 51.8 m³ of water per capita. As regards the share of waste water treated before discharge from the sewage system, with 77% the region was ranked slightly above the national average.

Table A.37: Data and indicators for City Municipality Nova Gorica, with comparison to Goriška region and Slovenia

Data for year 2018	City municipality Nova Gorica	Goriška region	Slovenia
Area km ²	280	2,325	20,273
Population	31,691	117,353	2,070,050
Population men	15,711	58,858	1,030,234
Population women	15,980	58,495	1,039,816
Population density	113	50.5	102
Natural increase	-51	-188	-900
Total increase	157	358	14,028
Live births per 1,000 population	8.2	9	9.5

Data for year 2018	City municipality Nova Gorica	Goriška region	Slovenia
Deaths per 1,000 population	9.8	10.6	9.9
Natural increase per 1,000 population	-1.6	-1.6	-0.4
Total net migration per 1,000 population	6.6	4.7	7.2
Total increase per 1,000 population	5	3.1	6.8
Mean age (years)	45.1	44.7	43.4
Ageing index	157	150	130.6
Ageing index for men	128	126	107.2
Ageing index for women	188	175	154.8
Number of kindergartens	16	57	968
Number of children in kindergartens	1,175	4,456	87,147
Number of pupils	2,840	10,391	184,101
Number of upper secondary school pupils (by residence)	1,183	4,061	73,110
Number of tertiary students (by residence)	37	4,439	75,991
Tertiary students (per 1,000 population)	36	38	37
Tertiary graduates (per 1,000 population)	7	9	8
Number of persons in employment (by residence)	13,129	49,283	872,772
Number of persons in employment (by work place)	14,903	46,235	872,772
Number of persons in paid employment (by work place)	13,319	40,175	780,203
Number of self-employed persons (by work place)	1,584	6,060	92,569
Employment rate (%)	66	66,5	64.2
Average monthly gross earnings per person (EUR)	1,666.01	1,608.06	1,681.55
Average monthly net earnings per person (EUR)	1,096.87	1,061.28	1,092.74
Average monthly gross earnings (index, SI=100)	99.1	95.6	100
Average monthly net earnings (index, SI=100)	100.4	97.1	100
Number of enterprises	3,599	11,876	200,174
Turnover of enterprises (EUR 1,000)	1,433,665	4,725,204	117,040,613
Number of dwellings, Dwelling Stock	13,338	50,757	852,181
Number of dwellings (per 1,000 population)	422	433	412
Number of dwellings with three or more rooms (%)	72	74	62
Average useful floor space, Dwelling Stock (m ²)	82.4	87.1	81.5
Number of passenger cars	19,712	72,242	1,143,150
Number of passenger cars (per 100 inhabitants)	62	61	55
Average age of passenger cars	11.7	11.5	10.1
Municipal waste collected by public waste removal scheme (ton)	14,379	47,036	747,535
Municipal waste collected by public waste removal scheme (kg/per person)	454	401	361
Export of goods (EUR mio.)	/	1,440	30,858
Import of goods (EUR mio.)	/	1,142	30,706
Investment in fixed assets	/	261,319	5,941,739
Regional gross domestic product (EUR mio.)	/	2,341	45,755
Regional gross domestic product per capita (EUR, current rate)	/	19,930	22,083
Current expenditure for environmental protection (EUR 1,000)	/	22,060	595,296
Gross fixed capital formation for environmental protection (EUR 1,000)	/	5,306	237,766

Source: SORS. (n.d.b.)

Nova Gorica was built according to the principles of modernist architecture after 1947, when the Paris Peace Treaty established a new border between Yugoslavia and Italy, leaving nearby Gorizia outside the borders of Yugoslavia and cutting off the Soča Valley, the Vipava Valley, the Gorizia Hills and the north-western Karst Plateau from their traditional regional urban centre. Since 1948, Nova Gorica has replaced Gorizia as the principal urban centre of the Gorizia region.

Tourism statistics

The number of overnight stays in Nova Gorica has slowly grown from 2008 to 2019, from 146,367 in 2008 to 193,824 in 2019 (index 2019/2008 is 132). The same was with arrivals, which grew from 76,505 in 2008 to 102,981 in 2019 (index 2019/2008 is 132) – see Figure A.103. However, the year 2019 recorded 9.5% less overnight stays than 2018.

The trend in average stay has remained rather constant – it has only slightly decreased, from 1.9 days in 2008 to 1.88 in 2019 (the Slovenian average in 2019 was 2.53 days). The percentage of foreign overnight stays was 91.5% (in 2019).

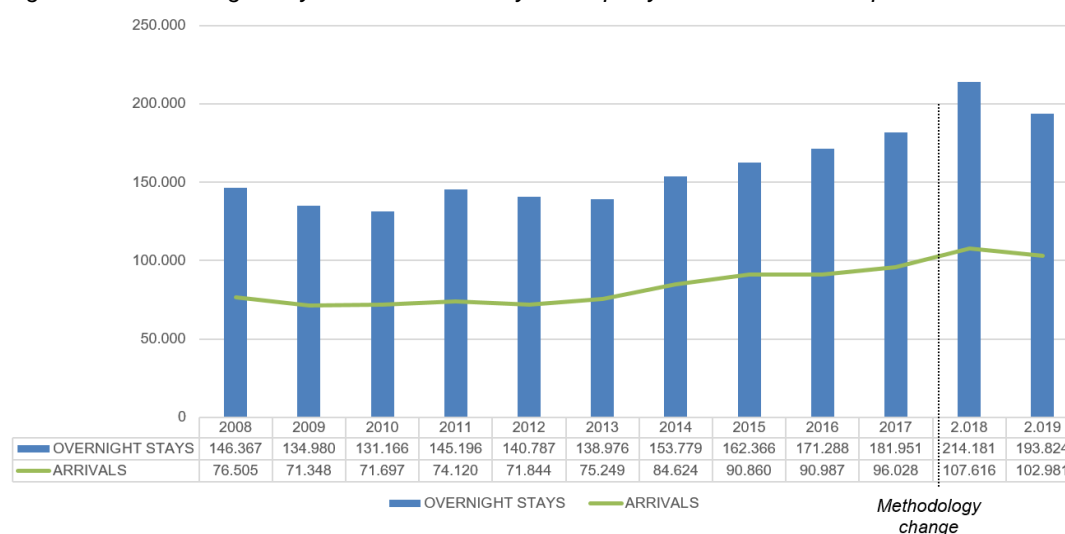
The whole Vipava Valley had 248,454 overnight stays and 130,137 arrivals in 2019 (Table A.38). This means that 80% of the whole Vipava Valley visits were generated by the City Municipality Nova Gorica alone. Nova Gorica had, according to SORS 2017 data, 1,675 beds, whereas the whole Vipava Valley had 2,583 beds. Data for 2018 and 2019 is not available due to a new methodology.

Table A.38: Overnight stays and arrivals in City Municipality Nova Gorica in 2018 and 2017

	Tourist arrivals 2018	Overnight stays 2018	Tourist arrivals 2017	Overnight stays 2017
Countries – Total	107,616	214,181	96,028	181,951
Domestic	10,335	19,874	7,504	13,453
Foreign	97,281	194,307	88,524	168,498

Source: SORS. (n.d.b.)

Figure A.103: Overnight stays and arrivals in City Municipality Nova Gorica in the period 2008 to 2019



Source: SORS

Table A.39: Overnight stays and arrivals in Vipava Valley (6 municipality), in 2019 (provisional data)

		2019M01	2019M02	2019M03	2019M04	2019M05	2019M06	2019M07	2019M08	2019M09	2019M10	2019M11	2019M12	2019
Ajdovščina	ARRIVALS	779	672	903	1.237	1.570	1.627	1.725	2.615	1.338	977	869	696	15.008
	OVERNIGHT STAYS	1.639	1.349	1.601	2.462	2.423	2.690	3.795	6.023	2.282	2.092	1.946	1.296	29.598
Miren - Kostanjevica	ARRIVALS	239	120	282	246	289	203	366	499	239	198	191	142	3.014
	OVERNIGHT STAYS	438	236	664	477	764	514	940	1.870	765	388	415	390	7.861
Nova Gorica	ARRIVALS	6.645	6.741	7.666	7.920	8.478	9.580	10.054	13.214	9.122	8.040	8.188	7.333	102.981
	OVERNIGHT STAYS	13.109	12.766	13.880	14.234	14.500	16.512	21.578	26.504	16.301	14.797	15.128	14.525	193.824
Renče - Vogrsko	ARRIVALS	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z
	OVERNIGHT STAYS	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z
Šempeter - Vrtojba	ARRIVALS	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z
	OVERNIGHT STAYS	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z	Z
Vipava	ARRIVALS	28	55	125	528	891	1.281	1.827	2.346	1.204	463	223	163	9.134
	OVERNIGHT STAYS	86	81	193	913	1.580	2.195	3.679	4.964	1.967	798	364	351	17.171

Source: SORS.

Destination profile

To understand the tourism profile and the positioning and product challenges of the destination, the background behind the cross-border character of the area needs to be further explained. This dates back to the end of World War II, when Gorizia became a part of Italy, whereas Posočje region and Vipava Valley lost its urban centre. The idea of developing Nova Gorica (the “new” Gorica city) started to come to life in 1947, with ambitious building plans. With opening up the borders and loss of a big proportion of the old industrial and logistic systems, Nova Gorica, together with Šempeter and the Italian Gorizia, needed to find a path to shape the new identities.

The main tourist product of Nova Gorica, which contributed vastly to its quick development and business prosperity in the transitional years, has been casinos. Therefore, there was no need at the time to actively pursue and exploit other potentials of the area. The gambling industry enabled to establish Nova Gorica as a gambling destination, with high brand recognition in the neighbouring Italian market.

The industry still generates about 1,400 jobs and remains an important part of the city strategy. But with the changes in the market in Slovenia and Italy and with the product coming into the “mature” product phase, the stakeholders (including the main casinos and hotels company HIT) have acknowledged the need for and potential of outdoor products (e.g., hiking, biking), gastronomy, MICE tourism, countryside tourism, and well-being.

Furthermore, the structure of tourism in wider Vipava Valley is very versatile and in different development stages, but with great potentials. The destination has also gained visibility through the Lonely Planet top 10 destinations list in 2018.

IV.1.2 Needs assessment

General overview of destination’s needs

Gorizia

Need for developing slow tourism

Although the area has been described as underexploited and underdeveloped and that more tourists are wanted, it is also emphasized that mass tourism should be avoided. Job opportunities in Gorizia decreased and the economy as a whole deteriorated after the fall of the Eastern Block and the adoption of the Schengen treaty since the military personnel was not present

anymore after these events and all customs-related activities regarding personal goods came to a halt. In other words, the main argument is that tourism per se should be developed in order to revive the overall economy of Gorizia (especially in terms of the employment opportunities and an overall positive economic spill-over effect), but rather than going on the path towards mass tourism, the focus should be on slow tourism. The destination develops e.g. with their cycling path a rather slow mobility image. The region is also well known for their white wine and the soft rural landscape. Altogether, the image of the destination should be based on a slow pace which attracts visitors who are not interested in famous attractions but rather in enjoying their life in a cosy atmosphere. Similarly, joint ticketing would attract people to travel by means of railway instead of their private car. Therefore, investments into the transport infrastructure could lead to attract visitors being interested in slow tourism but this requires a lot of investments which are currently not available.

Need for new tourism infrastructure

The approach of developing slow tourism calls for additional investments and changes in infrastructure that need to be introduced (e.g., common transportation infrastructure, more accommodation capacities, more shops besides convenience stores to attract visitors, common areas for working and leisure activities) along with repositioning and promoting the common destination (e.g., a small city with the cross-border image, “border taste”, slow mobility/slow pace, enjoying life, rural landscape, wine). In addition, this will entail changing the image of twin cities being merely a major transit point for trucks on their European routes. Local products and cuisine should also be integrated into the overall tourism experience and not only mentioned upon request. A commonly developed tourism infrastructure would help to increase the tourist flows and bring people into this region as overnight tourists and not just same day visitors. However, except from tourism infrastructure, there are also other investments necessary in order to become more attractive.

Need for coordinated efforts with other provinces in Friuli-Venezia Giulia (FVG)

Further collaboration with the other three big provinces in Friuli-Venezia Giulia (FVG), Udine, Trieste, and Pordenone is needed in fully optimizing the events calendar in order to motivate people to attend several events and visit more than one city but without overlapping important events at the same time in different cities. The same type of collaboration can and should be done with Slovenian cities. However, all of the above is subject to the efforts invested by both municipalities. Overall, such coordinated efforts would help the whole cross-border region to use the full potential for new tourism demands especially in the area of food, culture, and nature.

Need for cross-border governance

The stakeholders identified a change of behaviour within the group of Italian residents since there has not been any interest in the past to get in contact with the Slovenian residents but this has changed. More and more people are becoming interested in visiting “the other side” and there seems to be a positive response on the Slovenian side. Therefore, stakeholders are very

optimistic when it comes to residents' mind-set but are more critical about the political implementation. There is an identified need for cross-border governance which includes decision-makers, institutions, and people on both sides of the non-existent border within the city. Making the city to an attractive cross-border destination is a governance issue and the involved stakeholders need to set up suitable governance structures and mechanisms in order to succeed.

Nova Gorica

The analysis of the destination's tourism, carrying capacity, as well as overall socio-economic development shows the following key needs (challenges, threats, problems, as well as strengths and opportunities) that are relevant for the scope of the project:

Need for a competent body in tourism, dedicated to destination management and governance

The destination does not have yet a fully functioning DMO, as explained in sub-step IV.1.1. There are various levels of understanding of the destination. Firstly, the newly established DMMO organisation of Nova Gorica and Vipava Valley also covers the municipalities of Ajdovščina and Renče – Vogrsko (these municipalities were co-founders, together with Nova Gorica) – the destination is presently named Nova Gorica and Vipava Valley. The brand is to be Vipava Valley; however, the process of brand definition is still in place. Secondly, the destination DMMO markets the whole area of Vipava Valley, under the brand Vipava Valley (that means six municipalities all together). Thirdly, the major part of the destination Nova Gorica and Vipava Valley constitutes the city of Nova Gorica, which together with the neighbouring city Gorizia (in Italy) constitutes a joint cross-border city and develops cross-border products and activities, also in the field of tourism.

In order to speed up the process of destination management and governance and cross-border cooperation, the destination needs a competent and fully functioning DMO. The new public institute is only starting to work fully in 2020, and the year 2020 will be dedicated to forming the strategic framework, certain priorities, and an action plan.

Need for product diversification of the destination

Despite the predominant gambling profile of Nova Gorica, the Tourist Association Nova Gorica understood the need for product diversification years ago and developed a sound product portfolio system in the destination – on the top level the positioning of the city has been towards New Adventures, with five sub-products being GoGreen, GoCulture, GoLocal, GoCulture, GoActive.

The destination has a need and substantial potential for development of outdoor products (e.g., hiking, biking), gastronomy, MICE tourism, countryside tourism, and well-being. The urban character of the destination needs to be further interlinked and connected with the countryside and green surroundings. Nova Gorica is not only an urban destination and it needs to open to its green spaces. In addition, tourism in the wider Vipava Valley is very versatile and in different

development stages, but with great potentials, especially in wine, gastronomy, and outdoor products.

In the first step, the destination needs to define its product potentials and strategic product portfolio, priorities, and measures. This needs to be done through a well-coordinated and inclusive strategic process. A good indication of these needs is the leading destination's hotel and casinos company, which understands that in order to stay competitive, they need to offer their casino visitor an authentic destination experience (next to the casino product).

Need for strengthening cooperation and developing joint cross-border products

Because of the divide and resulting political history, Nova Gorica and Gorizia need to overcome significant cross-border obstacles. Since May 2011, Nova Gorica has been joined together with Gorizia and Šempeter – Vrtojba in a common trans-border metropolitan zone, administered by a joint administration board. There is a cultural cooperation with Gorizia taking place, but not so much yet in day-to-day tourism promotion – the destinations of Gorizia and Nova Gorica do not work as one; their cooperation is mainly project-based, as stated by the interviewees (see sub-step IV.1.4). With the joint candidacy for the European Capital of Culture 2025, the cooperation between the cities has a strong potential to increase in the future.

Cooperation in the field of tourism for a better-connected cross-border destination needs to become an integral part of destination management, product development, and governance. For its realization, a platform needs to be incorporated into the new Nova Gorica and Vipava Valley tourism strategy.

Good sustainability measures, but need to transfer sustainability actions into more value and incentives for visitors

Nova Gorica municipality holds the gold Slovenia Green label, indicating the destination's compliance with requirements defined by the Green Scheme of Slovenian Tourism (GSST), which is based upon the Green Destinations standard. Within the Slovenia Green destination label, the destination has a sustainability action plan, which is revised every three years. Next to Nova Gorica, the municipalities Vipava and Ajdovščina also hold Slovenia Green labels (silver), whereas Renče – Vogrsko is starting the process in 2020. The positive trend is that the biggest hotel provider in the municipality Nova Gorica (HIT Hotels & Casinos) has fully embraced the sustainability concept (it already has two hotels with a green label in Nova Gorica – Hotel Sabotin and Hotel Lipa), green local chains in gastronomy, and motivating guests to explore a wider destination. Through entering GSST, the platform gave the destination a very clear strategy and direction and they embraced sustainability as their core philosophy, but this needs to be transferred into the new tourism strategy. The destination has a Green Team, comprised of different stakeholders in the destination, but when the DMO becomes fully functioning, there should be a more active cooperation in the field of sustainability between the municipality and the tourism industry.

Obstacles and challenges in the process of improving sustainability in the destination as seen by the municipality, are: (1.) not enough active cooperation of tourist stakeholders in the process of developing the destination vision and development; (2.) different views and disagreements among the stakeholders; and (3.) lack of financial resources for sustainable development at all levels (e.g., tourist offer, training, accommodation facilities, mobility, and other tourist infrastructure).

Need for active visitor flow management and spread of the flows in Vipava Valley, and in a wider region

The majority of tourist visits in Nova Gorica is presently still generated by its leading gambling product. Due to its strategic location (good connections towards Gorizia, Brda, Soča Valley, and Karst), Nova Gorica needs to make a better use of its position and develop products that motivate visitors to stay longer and explore the area.

Summary of carrying capacity needs

Gorizia

Carrying capacity has to be assessed on a broader socio-economic scale and is therefore relevant for the whole cross-border region and should not be estimated only at the municipality level. Stakeholders in Gorizia constantly reflected upon the whole cross-border region and identified the need to develop a unified destination (stakeholders also confirmed it in the systemic picture which is presented in step 2). It has also been emphasized that the region has a huge potential but is currently underexploited and underdeveloped. There are no major tourist flows in the region and there is the perception that more people could come if the carrying capacity of the whole region would be considered. This would include the need for tailored investments into public transportation such as improving the railway accessibility.

Carrying capacity-relevant needs are the long-term plans of developing common infrastructure, including transportation as well as tourism business-related infrastructure to be prepared to spread tourists evenly throughout the cross-border region. This includes both directions: the whole Friuli-Venezia Giulia region, where a lot of potential had been identified in terms of designing specific packages around the topic of culinary, cultural, and nature tourism under the defined slow tourism strategy, as well as the inclusion of the Slovenian Vipava Valley. Especially here a need for a more integrated bilingual strategy had been identified by the stakeholders. There are many young Italian people who are interested in learning Slovenian language, but this would need to be integrated into the educational system which is a governance-related issue. There are lots of opportunities in promoting a bilingual destination, but there is a lack of embedding it into the societal system.

Stakeholders identified the need for a close cooperation to use the full potential of the joint application for the European Capital of Culture (ECC) 2025. The ECC application clearly has a carrying capacity implication and stakeholders see a need to incorporate sustainable and slow tourism planning aspects. One of the foreseen projects is the urban regeneration of Piazza

Transalpina/Trg Evrope, with the construction of a transcultural centre to be located exactly on the state border and with the foundations in both states. This project plays an essential role in the candidacy of Nova Gorica and Gorizia¹¹. If the candidacy will be successful, then the most pressing issue will be the lack of accommodation in Gorizia.

Nova Gorica

The destination does not have challenges in exceeding carrying capacity – not as a destination, and presently also not at one of the most frequented hills over the city, called Sabotin (estimation of the Tourist Association of Nova Gorica is that there are some 70,000 visitors annually).

However, hotspots are emerging. Visits are increasing, especially in: Solkan, home of the world's longest stone arch railroad bridge, which works as an entrance point into the Soča Valley and as a starting point for the Sabotin hill above Nova Gorica, and also for Sv. Gora, Vodice and Preški vrh; and especially in Vipavski križ, as well as at some other spots, such as Otiško okno, Nanos.

Furthermore, there is a need for more active and strategic visitor flows management. Stakeholders see potentials for Nova Gorica to better connect the urban area with its green surroundings and motivate the visitors to engage in experiences beyond the city centre.

The stakeholders from Nova Gorica also acknowledge the importance of the joint candidacy for the European Capital of Culture 2025 for strengthening cooperation and developing joint cross-border products.

IV.1.3 Policy and strategic orientation

Overview of relevant policy and strategic documents

Gorizia

At the local/municipality level:

- Municipal Master Plan;
- Environmental Regulations:
 - Regulation of the local landscape commission;
 - Regulation of the management of municipal waste;
- Local Agenda 21.

At the regional level:

- Italian Constitution law and through the Regional Law 26/20146, enforced its legislative power on the local governments by establishing 18 UTIs ("The Inter-Municipal Territorial Unions are local bodies with legal personality, having the nature of unions of municipalities, established by the regional law for the co-ordinated exercise of municipal, supra-municipal and wide area functions and services, as well as for territorial, economic and social development."- Regional Law 12 December 2014, n. 26 – Reorganisation of the

¹¹ See: <https://euro-go.eu/en/notizie-ed-eventi/eventi/concorso-internazionale-di-idee-la-riqualificazione-urbanistica-dellarea-della-piazza-transalpina/>

Local Region-Autonomy system in Friuli Venezia Giulia. Ordinance of Inter-Municipal Territorial Unions and reallocation of administrative functions);

- Tourism Plan of the Autonomous Region of Friuli-Venezia Giulia, 2014- 2018;
- Strategic Plan of the Autonomous Region of Friuli-Venezia Giulia, 2018-2023;
- Rural Development Programme of Friuli-Venezia Giulia, 2014-2020.

Nova Gorica

The most relevant strategic documents defining the strategic and policy orientation with regard to tourism and wider socio-economic framework in the destination are the following:

At local/municipality level:

- Strategy of Development of Tourism in Nova Gorica (prepared in 2001, but not relevant anymore); a new strategy is planned for 2020;
- Strategy of tourism development of Vipava Valley in the area of municipalities of Ajdovščina and Vipava 2016-2030, prepared in 2016;
- Sustainable Urban Strategy Nova Gorica 2020 (MONG, 2016);
- Integrated Mobility Strategy City Municipality Nova Gorica (MONG, 2017).

At the regional level:

- Regional Development Plan for 2014-2020 for Goriška region (prepared by Regional Development Agency of Northern Primorska Ltd Nova Gorica); a new strategy for the period 2021-2027 is being prepared.

Analysis of relevant policy and strategic documents and information from interviews

Gorizia

At the moment, this is at the local level probably the most challenging part as there is no shared strategic tourism orientation in place. Whilst it is true that the mayors and the clerks of both cities work together, which indicates a strong political wish for a joint development, there could be done much more in this respect. The Cultural Information Touchpoint (KIT) had been founded four years ago and is the only stakeholder which acts as a cross-border cultural information centre but is not an official tourism organization. This organization lacks financial support, which limits it in putting activities into practice. KIT promotes both Nova Gorica and Gorizia, and as such, is one of the key (yet still informal) stakeholders in tourism of one unique destination: Nova Gorica –Gorizia. However, KIT needs support from both sides. One way to bridge this gap would be to encourage common exhibitions and cultural events, which they are already attempting by giving visibility through their Facebook page. The idea is to create a common space like in a co-working space. So little steps that could make a difference in a long run. In the interview the problem of outmigration of especially young people had been addressed and here a proper tourism development would help to provide new perspectives for the younger generation.

Other examples of venturing into a more sustainable and common future are: (1) the bike trails that are already in a development phase and are a joint effort between Nova Gorica and Gorizia through the European Grouping of Territorial Cooperation (EGCT); (2) a joint application for the European Capital of Culture 2025 and for becoming a UNESCO World Heritage site; (3) the

Interreg Europe as an instrument supporting the cross-border cooperation; (4) attempts to unify some medical services such as a common maternity unit; and (5) transportation system plans that point towards a joint ticketing system, to name a few initiatives. As is evident, some progress is being made, yet all these opportunities are still to be unified into a shared strategic approach. In the interviews it had also been mentioned that there is more motivation for cross-border cooperation visible at the Slovenian side. There seems to be a lack of communication and exchange which leads to different perceptions.

The FVG region within the Italian state enjoys a special status that derives from historical paths in which many cultures have followed one another on its territory. It has always been a borderland because of its physical borders (the Alps and the Mediterranean Sea make three quarters of its borders), its linguistic borders (a good part of the territory is identified with Friulian, a Ladin language, intertwined with vast areas where there are present and active Slavic and Germanic languages), and the political borders that meet Austria and Slovenia towards the north and the east. Together with these two countries of notable tourism development, the FVG region has realized many common and cross-border projects. The tourism policies of the FVG region have shown considerable development over the last few decades. The FVG region is defined as a destination by the DMO PromoTurismoFVG which is responsible for developing a regional tourist system. Thus, PromoTurismoFVG provides guidelines and cooperation documents where all active stakeholders are integrated for promoting the region. As such, the DMO develops specific tourism products on the basis of the regional tourism plan.

Autonomous Region of Friuli-Venezia Giulia: Tourism Plan, 2014-2018

The 2014-2018 Tourism Plan of the Autonomous Region of Friuli-Venezia Giulia, approved by the Regional Council on May 30, 2014, is the strategic planning document for the entire territory and for the overall tourism sector of the region, in a system logic that allows to combine tourism, history, culture, food, transport, crafts, and industry. The objective of the plan is to make Friuli-Venezia Giulia a slow tourist destination capable of offering thematic tourism with high added value. The important goal the plan is aiming at is the transformation of the territory into an integrated tourism system. The tourist model to be achieved is based on three key concepts: competitiveness, attractiveness, and sustainability. By creating a performing and dynamic tourist economy, the perception of individual tourism suppliers should be improved and renewed and the tourist destinations of Friuli-Venezia Giulia are to be relaunched. With the increasing recognition of Friuli-Venezia Giulia, tourism's contribution to the regional economy is to be improved.

Autonomous Region of Friuli-Venezia Giulia: Strategic Plan, 2018-2023

The Strategic Plan, 2018-2023 approved by the Local Government on February 8, 2018, includes at point 7 the directives regarding tourism and culture, which blend together in a common strategy: rediscover the roots and strengthen the identity through the enhancement of cultural heritage and regional traditions. The region contributes to stimulate the promotion of the territory and its multiple riches through projects shared between neighboring countries and regions

(Veneto, Austria, Slovenia, and Croatia) or similar, linked by a central annual theme. Investments will be supported for the recovery, preservation, and enhancement of the assets of the archaeological heritage.

To favor the influx of visitors, the focus is on a quality offer, for which the traditional cities of the sea and the mountains are joined by the cities of art. FVG aims to be a 360 degree tourist destination, open to reception 365 days a year. This service will be provided for the new strategic tourism plan 2019-2023. The region aims at the development of slow tourism, ecotourism, wellness and fitness, and more generally of experiential tourist routes. Tourist facilities, with specific attention to the ski areas, the cycle network, and the spas will be a part of the development plan on sustainable hospitality. The use of social tools will be consolidated since they are increasingly pervasive and decisive in the choice of vacation locations.

There are several calls for tender on the FVG PromoTurismo website, and some ongoing projects are actually being set up, developed or in phase of finalization, but in all other resources, only one project includes a common project with Slovenia, the SONZO-SOČA Cross-Border park.

Nova Gorica

There is no tourism strategy in place presently in Nova Gorica. The last one (Strategy of Development of Tourism in Nova Gorica) was prepared in 2001 and is not relevant anymore. The process for the new strategy for Nova Gorica and Vipava Valley will take place in 2020.

The municipalities of Vipava and Ajdovščina have, however, a joint tourism strategy, entitled Strategy of tourism development of Vipava Valley in the area of municipalities of Ajdovščina and Vipava 2016-2030, prepared in 2016. This was a necessary strategic basis for their Slovenia Green label for Vipava and Ajdovščina. The strategy defines guidelines for tourism in a wider area of Vipava Valley, defining three pillars: development of tourism, which is based on (1.) sports and outdoor products; (2.) wine and gastronomy; and (3.) heritage (culture and nature).

Big potential and future orientation of the municipality in the field of tourism is establishing connections with the destinations of Brda (Goriška Brda), Soča Valley (Bovec, Tolmin, Kobarid and Kanal ob Soči, and wider region of Julian Alps, since there is a natural connection of the Soča River, which connects the Mediterranean and Karst region with the Alps), and Gorizia.

Nova Gorica has worked within its product portfolio system (with products GoGreen, GoCulture, GoLocal, GoCulture, GoActive) for many years now. Through entering GSST, the platform gave them a very clear strategy and direction and they embraced sustainability as their core philosophy. They are considered to be one of the most dynamic green teams in the scheme.

According to the interview with the Nova Gorica Municipality, the year 2020 will be dedicated to formulating strong joint foundations and priorities for sustainable development and marketing of tourism in all three founding municipality members.

Tourism in Nova Gorica is integrated into the Sustainable Urban Strategy Nova Gorica 2020 (MONG, 2016), as one of the measures within the priority number [1]: economically dynamic

and innovative city. In tourism, the goal for the next two years is to get more accommodation providers, tourist agencies and wineries to get green labels and to establish local green chains. The strategy defines the potentials in tourism as follows: (1.) developing the product of the “young city and cross-border cooperation with Gorizia” (the joint market square Europe, development of a visitor centre and positioning of the TIC into the railway station, in order to serve as an entrance point into the city); (2.) valorisation of the industrial, cultural and architectural heritage (Bohinj railway, Solkan, Ravnikar), and World War I; and (3.) development of outdoor products (Soča river, paragliding, hiking and biking).

Other priorities within the sustainable urban strategy are: [2] efficient city (smart city, energy management, sustainable mobility); [3] dynamic living community (public spaces, recreation and spaces for leisure activities, urban culture and quarter initiatives, housing policies, social activities for vulnerable groups); and [4] urban development management (management of the transformation process). The vision of the municipality is: “young and green centre of creative energies”.

An important strategic document which will shape the future activities and the image of Nova Gorica is the Integrated Mobility Strategy for the City Municipality Nova Gorica. This strategic document places quality of residents’ life and sustainability at its core and structures its measures around three pillars: (1.) establishing integral mobility planning; (2.) walking as the core mobility; and (3.) better cycling possibilities.

Summary of policy and strategic priorities

Gorizia

Policy and strategic priorities for tourism are mainly driven by the Autonomous Region of Friuli-Venezia Giulia. The DMO FVG PromoTurismo is responsible for promoting the whole region. There is one cross-border project promoted the SONZO-SOČA Cross-Border park.

At the local level, the mayors of both cities Gorizia (Rodolfo Ziberna) and Nova Gorica (Klemen Miklavič) are cooperating intensively for the candidacy of European Capital of Culture 2025 which is also in place during the COVID-19 crisis. There is a "**Virtual Cafe with GO! 2025 Nova Gorica – Gorizia**" installed where the two mayors meet daily. Both mayors have an agreement to cooperate within the European Grouping of Territorial Cooperation (EGTC), the joint economic zone (zona economica speciale (ZES)), and in tourism and culture.

Nova Gorica

Policies and strategic priorities are directed to develop Nova Gorica as an economic and cultural centre of the Goriška region, and a vital part of the cross-border co-cities with Šempeter and Gorizia. Furthermore, Nova Gorica is striving to become a centre of creative energies and connections in the triangle of Ljubljana, and the three Italian cities: Venice, Trieste, and Udine. Tourism is one of its strategic economies and Nova Gorica's strategic priority is to better connect the urban character of the city (also together with Gorizia) with its green surroundings in a wider area of Vipava Valley and beyond.

IV.1.4 Interviews

Altogether, interviews cover general questions related to the destination and the sustainable tourism approach, as well as more specific questions associated with the carrying capacity dimension and perceived obstacles. The information provided in the interviews supplement the studies and the data collected by regional authorities and organisations as well as the data collected from statistical offices. The information collected during interviews has been integrated into the overview of the destination provided in step 1. The stakeholders who were most capable of answering the interview questions were identified and presented in tables below.

Table A.40: Overview of interviewed stakeholders in Gorizia

Interviewee name	Institution/organisation	Position	Contact details
<i>Kristina Markova</i>	<i>KIT – Cultural Information Touchpoint Nova Gorica/Gorizia</i>	<i>Owner</i>	<i>Area5717@gmail.com</i>
<i>Ivan Curzolo</i>	<i>Informest</i>	<i>Head of Informest</i>	<i>ivan.curzolo@informest.it</i>
<i>Fabrizio Oreti</i>	<i>Municipality of Gorizia</i>	<i>Councillor of Tourism</i>	<i>fabrizio.oreti@comune.gorizia.it</i>

Source: Consortium, 2020

Table A.41: Overview of interviewed stakeholders in Nova Gorica

Interviewee name	Institution/organisation	Position	Contact details
<i>Interviewee 1</i>	<i>Nova Gorica Tourist Association</i>	<i>Green Coordinator of Nova Gorica</i>	<i>Upon request</i>
<i>Interviewee 2</i>	<i>DMO Tourism Nova Gorica and Vipava Valley</i>	<i>Deputy director</i>	<i>Upon request</i>
<i>Interviewee 3</i>	<i>HIT Casinos & resorts</i>	<i>Director of Sales Department</i>	<i>Upon request</i>
<i>Interviewee 4</i>	<i>City Municipality Nova Gorica (MONG)</i>	<i>Vice-mayor for Sports and Tourism</i>	<i>Upon request</i>

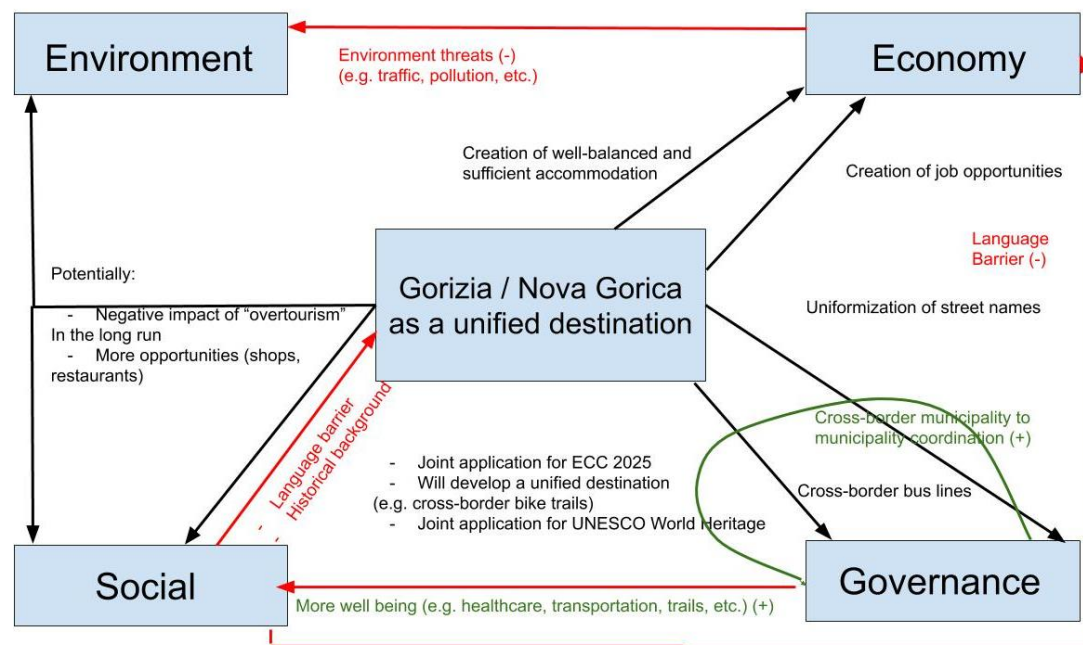
Source: Consortium, 2020

IV.2 Step 2

IV.2.1 Development of a systemic picture

Gorizia

Figure A.104: Preliminary systemic picture Gorizia – draft compiled by the research team (2 March 2020)



Source: Consortium, 2020

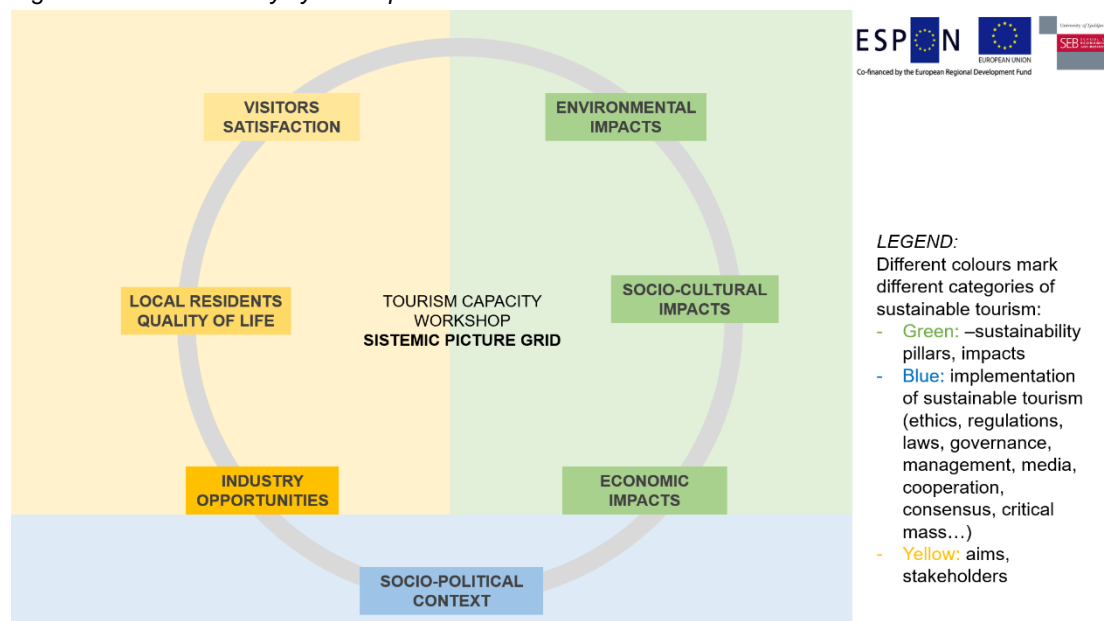
After the three interviews with the stakeholders from Gorizia the research team had an internal workshop with the aim of drafting a systemic picture based on the information retrieved from the policy documents as well as the interviews. Thus, the resulting preliminary systemic picture for Gorizia is shown in Figure A.104.

Nova Gorica

For the destination workshop, SEBLU prepared the systemic picture grid and indicators catalogue for destination's experts. Experts have been trained to use the same methodological approach in all four destinations. All experts participated at the first workshop, held for Bled as the pilot destination. After the meeting, the evaluation confirmed the proposed methodological approach. All elements of the systemic grid have been well addressed.

The systemic picture grid (Figure A.105) offers a platform for discussion areas for destination's stakeholders to focus on capacity, impacts and challenges, from different perspectives. Green elements refer to sustainability pillars and impacts of tourism in the area of each (environmental, socio-cultural, and economic). Yellow fields mark the destination's main participants and their satisfaction with tourism presence and opportunities in the given destination. The socio-political context, coloured blue, captures the whole dimension of destination's management (including governance and leadership), collaboration among destination's stakeholders, consensus building, strategy, legislation, sustainability awareness, etc.

Figure A.105: Preliminary systemic picture Nova Gorica



Source: Consortium, 2020

IV.2.2 Identification of context indicators and data

Table A.42: Overview of availability of context indicators – Gorizia

Indicator name	Source	Territorial unit	Time	Comments
Area	ISTAT	Municipality		
Population	ISTAT	Municipality and FVG region	2007-2019	
Number of births	ISTAT	Municipality and FVG region	2007-2019	
Number of deaths	ISTAT	Municipality and FVG region	2007-2019	
Immigrants	ISTAT	Municipality	2007-2019	
Emigrants	ISTAT	Municipality	2007-2019	
Number of businesses	Italian Chamber of Commerce	Municipality	2007-2013	
Estimated number of cars transiting	ISTAT	Municipality		There are data on commuting for studying and working based on the General population and housing censuses
WIFI access data	Free WIFI net	Municipality		
Click stream data	City of Gorizia	Municipality		
Waste production per tourist night compared to general population waste production per person	ISTAT	Municipality	2007-2019	
Water consumption per tourist night compared to general population water consumption per resident night	ISTAT	Municipality	2007-2019	

Indicator name	Source	Territorial unit	Time	Comments
Energy consumption per tourist night compared to general population energy consumption per resident night	ISTAT	Municipality	2007-2019	
Closeness to next airport	ISTAT	Municipality		
Closeness to next cruise port	ISTAT	Municipality		

Source: Consortium, 2020.

Table A.43: Overview of availability of context indicators – Nova Gorica

Indicator	Source	Territorial unit	Time	Comments
Area km ²	SORS, destination	Municipality	Annually	Available
Population	SORS, destination	Municipality	Annually	Available
Number of persons in paid employment	SORS, destination	Municipality	Annually	Available
Turnover of enterprises (EUR 1,000)	SORS, destination	Municipality	Annually	Available
Number of enterprises	SORS, destination	Municipality	Annually	Available
Density of population (per km ²)	SORS, destination	Municipality	Annually	Available
Registered unemployment rate (%)	SORS, destination	Municipality	Annually	Available
Natural increase (per 1,000 population)	SORS, destination	Municipality	Annually	Available
Ageing index	SORS, destination	Municipality	Annually	Available
Average monthly gross earnings (index, SI=100)	SORS, destination	Municipality	Annually	Available
Employment/population ratio (%)	SORS, destination	Municipality	Annually	Available
Municipal waste collected (kg/person)	SORS, destination	Municipality	Annually	Available
WIFI access	Tourism 4.0	Municipality	Annually	If available
Mobile data access	Tourism 4.0	Municipality	Annually	If available
Bus tickets sold	Public/private authorities	Municipality	Annually	If available
Railway tickets sold	Public/private authorities	Municipality	Annually	If available
Air quality data	ARSO	Municipality	Annually	If available

Source: Consortium, 2020.

IV.2.3 Identification of tourism indicators and data

Table A.44: Overview of availability of tourism indicators – Gorizia

Indicator name	Source	Territorial unit	Time	Comments
Absolute number of bednights	ISTAT	Municipality	2008-2019	
Absolute number of arrivals	ISTAT	Municipality	2008-2019	
Average length of stay	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Distribution of demand	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Same day visitors/total number of visitors	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Tourism density	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Tourism intensity	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Distribution of bedspaces (Moran's I)	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019	
Share of Airbnb bedspaces		Municipality	2008-2019	

Absolute number of bedspaces in commercial accommodation establishments	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019
Change of absolute number of bedspaces in commercial accommodation establishments	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019
Tourism revenues of product & service providers	ISTAT or PROMOTURISMO FVG	Municipality	2008-2019
Share of tourism contribution to GDP	ISTAT	Municipality	2008-2019
Occupancy rate	PROMOTURISMO FVG	Municipality	2008-2019
Instagram data	Instagram	FVG region and Municipality	
Tourist related open street map points-of-interest	Open Street Data	FVG region and Municipality	
Closeness to next World Heritage Sites (WHS)	ISTAT	Municipality	
Overall satisfaction of visitors and residents with tourism	PROMOTURISMO FVG	Municipality	
Negative TripAdvisor reviews	TripAdvisor	Municipality and FVG region	

Source: Consortium, 2020.

Table A.45: Overview of availability of tourism indicators – Nova Gorica

Indicator name	Source	Territorial unit	Time	Comments
Importance of tourism (1): % of tourism in GDP of the destination	Municipality data/AJPES	Municipality	Yearly	If available
Importance of tourism (2): % of tourism employees in total employment in the destination	Municipality data/AJPES	Municipality	Yearly	If available
Amount of tourist tax paid	Municipality data	Municipality	Yearly	Available
Amount of concessions paid	Municipality data	Municipality	Yearly	Available
Percentage of tourism enterprises taking actions to reduce water consumption	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises separating different types of waste	Municipality data	Municipality	Yearly	If available
Percentage of tourism enterprises that take actions to reduce energy consumption	Municipality data	Municipality	Yearly	If available
Tourism density – destination	SORS	Municipality	Yearly, monthly	Available
Tourism intensity – destination	SORS	Municipality	Yearly, monthly	Available
Visitation concentration per day or season – on identified hotspots needing management	Municipality data	Municipality	Yearly	If available
Residents' satisfaction with tourism	Municipality data	Municipality	As per conducted survey	Available, GSST (every 3 years)
Visitors' satisfaction with visitation	Municipality data, data on Tripadvisor and booking portals	Municipality	As per conducted survey	Available, GSST, available on TripAdvisor and booking portals
Arrivals seasonality	SORS	Municipality	Yearly, monthly	Available

Indicator name	Source	Territorial unit	Time	Comments
Number of tourists/visitors per 100 residents	Municipality data	Municipality	yearly	If available
Visitors – per attraction	Attraction operator	Attraction	Yearly, monthly	If available
Arrivals: Number	SORS	Municipality	Yearly, monthly	Available
Overnights: number	SORS	Municipality	Yearly, monthly	Available
Average length of stay	SORS	Municipality	Yearly, monthly	Available
Arrivals growth: %	SORS	Municipality	Yearly, monthly	Available
Overnights growth: %	SORS	Municipality	Yearly, monthly	Available
Visitors – destination	SORS	Municipality	Yearly, monthly	Available
Average length of stay	Municipality data	Municipality	Yearly	If available
Number of beds in hotels per resident	Municipality data	Municipality	Yearly	If available
Growth in number of beds in hotels in the last 5 years in %	Municipality data	Municipality	Yearly	If available
Number of beds in tourist farms per resident	Municipality data	Municipality	Yearly	If available
Growth in number of beds in tourist farms in the last 5 years in %	Municipality data	Municipality	Yearly	If available
Tourism industry satisfaction with tourism opportunities	Municipality data	Municipality	As per conducted survey	Available, GSST (check confirmed that quantitative data is not available)
Number of new businesses and persons involved in tourism	Municipality data	Municipality	Yearly	If available
Number of joint cross-border projects and initiatives	Municipality data	Municipality	Yearly	If available
Number of visitors on cross-border tours/packages	Municipality data	Municipality	Yearly	If available

Source: *Consortium, 2020.*

IV.2.4 Systemic Picture Workshop

Gorizia

The workshop was held as an online workshop due to the outbreak of COVID-19 and the closed borders between Austria, Italy, and Slovenia. All workshop participants were connected via Skype conference call with a shared screen.

Participants

Table A.46: Overview of workshop participants

Participant	Institution/organisation	Position
Kristina Markova	KIT – Cultural Information Touchpoint Nova Gorica/Gorizia	Owner
Ivan Curzolo	Informest	Head of Informest
Bozana Zekan	Modul University Vienna	Assistant Professor, Expert in the project
Ulrich Gunter	Modul University Vienna	Associate Professor, Expert in the project

Participant	Institution/organisation	Position
Daniel Dan	Modul University Vienna	<i>Assistant Professor, Expert in the project, Moderator of the Workshop</i>
Christian Weismayer	Modul University Vienna	<i>Assistant Professor, Expert in the project</i>
Sabine Sedlacek	Modul University Vienna	<i>Associate Professor, Expert in the project</i>

Source: Consortium, 2020

Outcomes of the Systemic Picture Workshop

First, it needs to be added here that due to the outbreak of the COVID-19 pandemic the workshop with stakeholders from the cross-border destination Gorizia – Nova Gorica could not be held in Nova Gorica as initially planned. Therefore, the Austrian team organized an online workshop with the Gorizia stakeholders via Skype conference call and after the first part, the plan was to connect to the Nova Gorica workshop which was held with physical presence. Unfortunately, due to the COVID-19 pandemic with restrictions in Slovenia and Italy, the Slovenian stakeholders were no longer present during the online connection with Misa Novak, the Slovenian expert. Therefore, the Italian stakeholders attended the Skype call with Misa Novak and the MU workshop team.

Discussion of destination's needs as well as policy and strategic orientation

Gorizia

Validation of needs assessment

The needs assessment had been briefly presented at the beginning of the workshop and the two stakeholders expressed their individual needs in the context of the cross-border destination. Both stakeholders had been also interviewed and therefore confirmed the expert assessment. However, both emphasized during the workshop their institutional view from their individual stakeholder perspective.

KIT had been founded four years ago with the clear-cut goal to build up cross border information and to represent both parts of the city. Therefore, KIT defines itself as a facilitator which acts with the support and help of both governments but has no official status or official mandate to help to unify the region with the purpose of gaining cohesion. Therefore, KIT underlines the cross-border governance need and here more particularly the need to integrate KIT into the EGTC with the support of the two mayors (political initiation). In addition, a more regular stakeholder dialogue would help to bring organizational and individual stakeholders together.

Validation of policy and strategic orientation

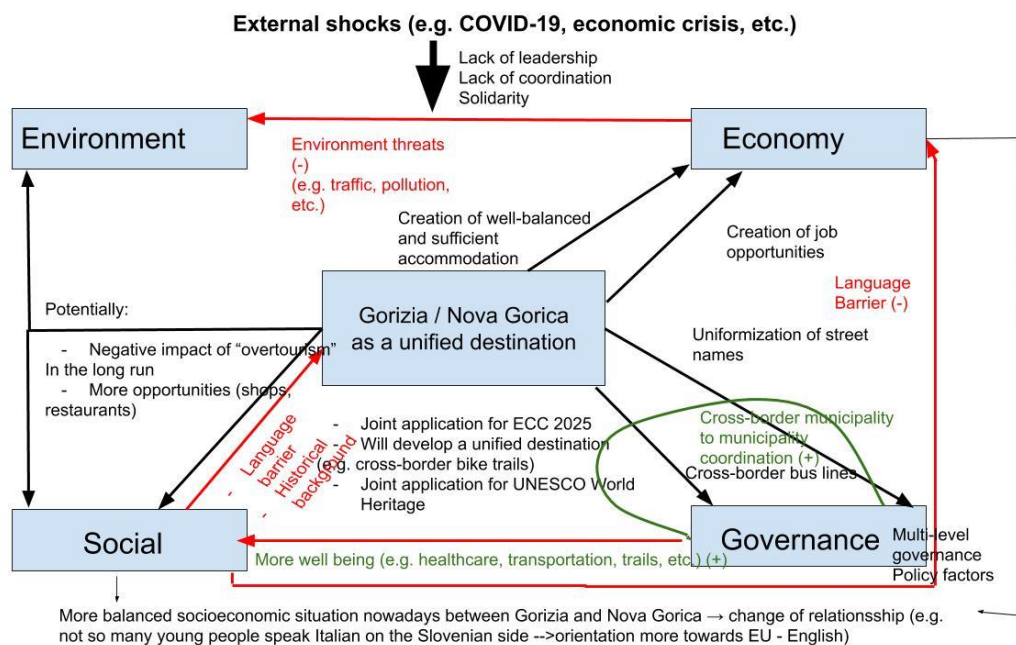
Especially the policy and strategic orientation had been discussed with the two stakeholders and both agree with the experts' assessment. Details have been integrated into the systemic picture discussion.

Systemic picture revisited

Final systemic picture

The systemic picture included here (Figure A.106) is the result of the virtual Gorizia workshop organized by the Modul team on Friday, 13 March 2020. The two stakeholders Kristina Markova (KIT) and Ivan Curzolo (Informest) discussed the single dimensions included already in the preliminary systemic picture from their individual institutional stakeholder perspective and highlighted the main obstacles and barriers as well as the potential they identified for developing a unified destination Gorizia – Nova Gorica. These two individual perspectives led to a group discussion about the main elements illustrated in the preliminary version of the systemic picture developed by the Modul team in an interactive internal workshop. Those elements were: environment, economy, social, governance, and the positive and negative interlinkages between those elements.

Figure A.106: Final systemic picture Gorizia



Source: Consortium, 2020.

In the workshop, the two stakeholders emphasized the importance of external factors, like external shocks which affect the destination and lead to a sustained change of behaviour. Therefore, external shocks such as the COVID-19 pandemic have been added to the systemic picture.

Analysis of the systemic picture

The discussion started with a focus on the negative impact of overtourism. Both stakeholders claimed that there is no negative impact at the moment and that tourism is not perceived as an environmental problem. However, the environmental dimension has to be monitored, especially if the unified destination will develop more coordinated activities in cooperation with the Italian and Slovenian surrounding regions which will definitely induce more traffic. The social dimension is perceived as the challenging factor when it comes to the development of a unified

destination and here more particularly the language barrier which is perceived as a real problem where both stakeholders see the European Commission (EC) in a moderating role. The idea of developing Gorizia – Nova Gorica as a bilingual destination had been addressed and here the EC would be seen as important initiator and supporter for this idea. The stakeholders also identified a cross-border governance issue since a bilingual destination could only be supported if the two mayors would introduce the two languages as official school languages in both parts of the city. The COVID-19 pandemic has been identified as external shock where this separation is perceived even more badly since the border was closed (see Figure A.107). Without COVID-19, mingling was always possible and it felt natural. There are also quite a lot of mixed families across the border, which are a proof of a well working societal acceptance.

Figure A.107: Closed border at Piazza Transalpina/Trg Evrope in May 2020



Source: KIT 2020

The governance dimension has been mentioned as the core factor, which would need to be changed in the future in order to promote and implement a unified destination. The need for multi-level governance, which would help to harmonize national and local decisions had been addressed in the context of a lack of leadership and the wish for more coordination at the EU level. There are quite a lot of local political changes currently going on, but overall policy has been perceived as the critical dimension due to the historical factors of this history-charged region. The two countries Italy and Slovenia had experienced completely different political developments characterizing their societal stances. In the past, Slovenian schools offered Italian as foreign language since there was the interest in participating in the Italian socio-economic

supremacy during the era of the former Yugoslavia, which had been perceived as part of the “Western World”. Residents of Nova Gorica also watched Italian TV, but this all changed with Slovenia’s accession to the EU, which can be defined as switch towards Europe and, language-wise, towards English. Today, the socio-economic situation between the two countries is more balanced than before, which is a positive effect but there is also a negative impact visible in terms of solidarity across the border.

Identification and verification of indicators and data sources

The indicators and data sources have been addressed mainly in the interview with the representative of the municipality Gorizia who had not been able to attend the workshop due to the COVID-19 pandemic. The stakeholders who attended the workshop did not feel competent to verify the indicators and data sources that had been discussed with the municipality. Therefore, this part had been moved towards the period after the workshop.

Nova Gorica

At the beginning of the workshop, the expert briefly outlined the main aspects of the destination analysis, as a starting point for more informed discussion.

The most highlighted issue by stakeholders was the need for accelerated development of leisure products (outdoor, sports tourism, wine and gastronomy) and MICE tourism (incentives and smaller conference/congresses) in the destination, and the potential of wider destination of Vipava Valley.

Negative impacts of tourism are not present yet in the area and are being evaluated through the Slovenia Green process.

Hotspots are emerging, however – increasing number of visits especially in Solkanas an entrance point into the Soča Valley and as a starting point for the Sabotin hill above Nova Gorica, also at Sv. Gora, Vodice and Preški vrh, and in Vipavski križ and at some other spots, such as Otliško okno and Nanos.

An important part of the discussion was dedicated to the cross-border aspect of a joint destination Gorizia – Nova Gorica. Participants claimed that even though there are no more physical borders between the cities of Gorizia – Nova Gorica, they still exist in people’s minds. However, they all strongly agreed about the potential of cross-border joint products of Gorizia-Nova Gorica – especially culture and history (tours, trails, stories, products, packages). They mentioned that people/organisations in tourism do not know each other and do not work together yet. Furthermore, there is too little cooperation on a day-to-day basis in tourism (especially outside the EU funded projects). They believe the joint candidacy for ECC 2025 has been an important step forward and can bring many benefits in the future.

The expert showed good understanding of the challenges the destination Nova Gorica-Vipava Valley has today: they are only starting to kick-off the destination management and marketing organisation as of 2020. They still have to define the priorities to work on, prepare the tourism

strategy, formulate the brand, etc. As stressed in the interviews in Step 1, important work was done in the destination with entering the Green Scheme of Slovenian Tourism. This process gave the destination a clear focus and tools.

During the whole process of performing the interviews and the workshop, it was made very clear that the basic condition for strengthening the cooperation of Nova Gorica with Gorizia, as well as other destinations (Beda, Soča Valley, and Vipava Valley), is the constitution of a professional DMO organisation, which will lead this process.

Validation of policy and strategic orientation

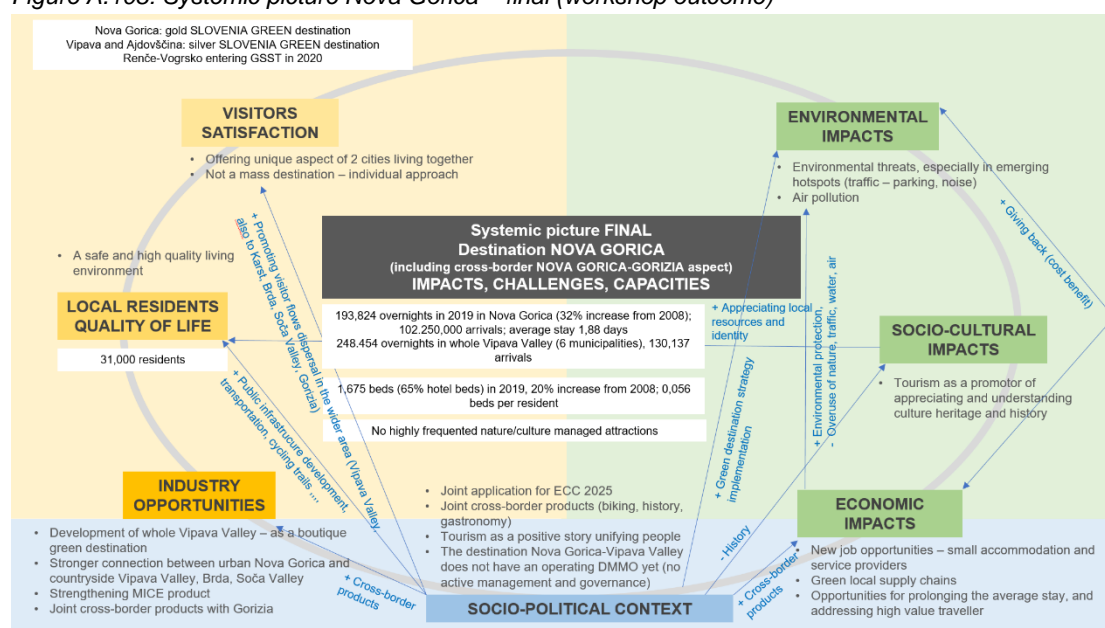
The ESPON SEBLU expert's assessment in the introductory part of the workshop was appropriate and well informed (the expert had been in charge of the destination organisation model of Slovenian tourism at Slovenian Tourist Board from 2017 to 2019, and was in this period in contact with Nova Gorica-Vipava Valley many times) – but did not cover the cross-border aspect. This was an open discussion.

Systemic picture revisited

Final systemic picture

There was no striking difference. However, what SEBLU found interesting was that the stakeholders do not understand/know Gorizia as a tourist destination very well: neither the organisational structure of tourism, the people in charge, nor the number of visitors, etc. They all acknowledged that this should improve and that there are big potentials for stronger cooperation in the future.

Figure A.108: Systemic picture Nova Gorica – final (workshop outcome)



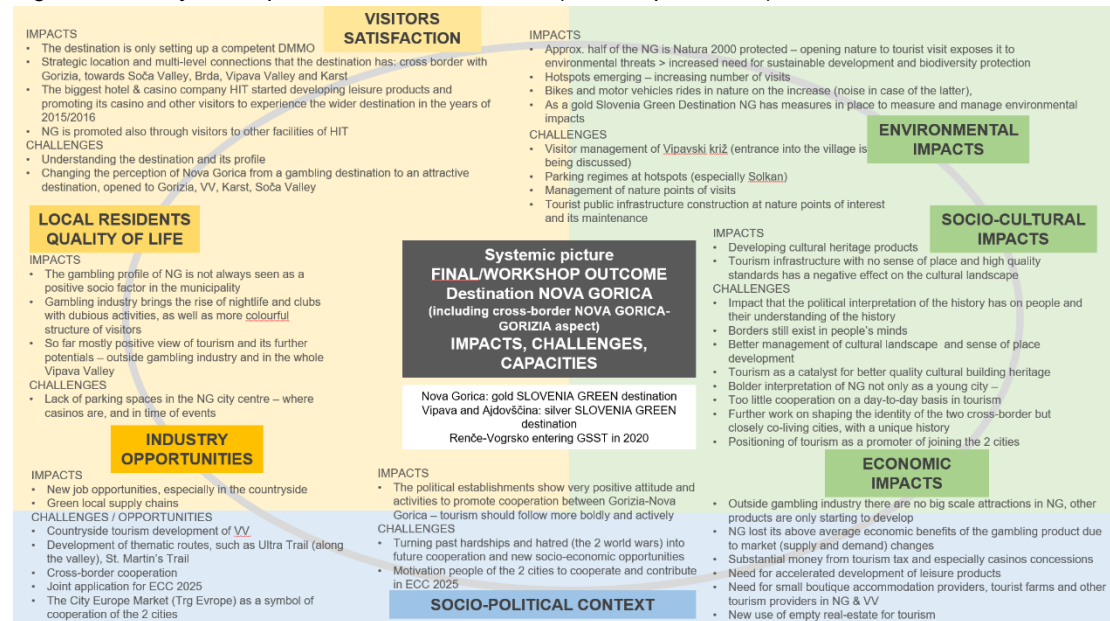
Source: Nova Gorica destination workshop, 13.3.2020

The workshop participants addressed all the elements of the proposed systemic picture grid and discussed the interlinkages and impacts between different categories (Figure A.108). As

expected, the categories are interdependent and often certain situations (impacts, challenges, and capacities) have impacts on various categories. No irrelevant or new issues or topics have been identified at the workshop.

The discussion has been moderated by a design thinking approach and resulted in a number of observations, comments, views, challenges, and impacts, as presented in Figure A.108 and in more details in Figure A.109.

Figure A.109: Systemic picture Nova Gorica – final (workshop outcome), in more details



Source: Nova Gorica destination workshop, 13.3.2020

Participants discussed capacities, impacts, and challenges for the seven categories – first through individual work (preparing ideas/views on stick-it posts), and then through group discussion: commenting views, adding to them, and supporting them. In the third phase, all stick-it posts were attached to the wall and were grouped. When all impacts/challenges were documented, a coordinated plenary discussion was facilitated.

Analysis of the systemic picture

The following describes the outcomes of the systemic picture exercise.

Category	Impacts
Environmental impacts	<ul style="list-style-type: none"> Approx. half of the Nova Gorica Municipality is Natura 2000 protected – opening nature to tourist visit exposes it to environmental threats > increased need for sustainable development and biodiversity protection Hotspots emerging – increasing number of visits (especially 1-Solkan, home of the world's longest stone arch railroad bridge, as an entrance point into the Soča Valley and as a starting point for the Sabotin hill above Nova Gorica, and also for Sv. Gora, Vodice and Preški vrh; and 2-Vipavski križ, 3-some other spots, such as Otliško okno, Nanos) Bikes and motor vehicles rides in nature on the increase (noise in case of the latter), but in overall there is not a negative impact of outdoor activities on nature Negative effects on the environment are being managed and avoided when possible – the New Year's fireworks were cancelled already some years ago As a gold Slovenia Green Destination Nova Gorica has measures in place to measure and manage environmental impacts

	<p>Challenges</p> <ul style="list-style-type: none"> – Visitor management of Vipavski križ (entrance into the village is being discussed) – Parking regimes at hotspots (especially Solkan) – Management of nature points of visits – Tourist public infrastructure construction at nature points of interest and its maintenance
Socio-cultural impacts	<p>Impacts</p> <ul style="list-style-type: none"> – Developing cultural heritage products has a positive impact for the locals on the understanding of the identity of the place and people – Social benefits from SC activities (protection, investment into infrastructure, old building reconstruction and cleaning of the environment, education) – Tourism infrastructure with no sense of place and high-quality standards has a negative effect on the cultural landscape and undermines the potential that Nova Gorica (and whole Vipava Valley) has <p>Challenges</p> <ul style="list-style-type: none"> – Impact that the political interpretation of the history has on people and their understanding of the history – There are no more physical borders between the cities of Gorizia-Nova Gorica, but they still exist in people's minds – Better management of cultural landscape and sense of place development – Tourism as a catalyst for better quality cultural building heritage reconstruction – Bolder interpretation of Nova Gorica not only as a young city (youngest in Slovenia), but a city with rich history and as a joint cross-border destination Gorizia-Nova Gorica – Cross-border joint products of Gorizia-Nova Gorica – culture and history (tours, trails, stories, products, packages) – Too little cooperation on a day-to-day basis in tourism (also outside EU funded projects) – people/organisations in tourism do not know each other and do not work together – Further work on shaping the identity of the two cross-border but closely co-living cities, with a unique history – Positioning of tourism as a promoter of joining the 2 cities
Economic impacts	<p>Impacts</p> <ul style="list-style-type: none"> – Outside gambling industry, which enabled the development of tourism in Nova Gorica, there are no big scale attractions in Nova Gorica and whole Vipava Valley – other products (outdoor, MICE, wine & gastronomy) are only starting to gain visibility and generate visitation – Nova Gorica lost its above average economic benefits of the gambling product due to market (supply and demand) changes – there has a decrease in casinos' visits in the city (from some 2,000-3,000 to 1,000-2,000) – Substantial money from tourism tax and especially casinos concessions <p>Challenges</p> <ul style="list-style-type: none"> – Need for accelerated development of leisure products (outdoor, sports tourism, wine & gastronomy) and MICE (incentives and smaller conference/congresses) – there is a rather big backlog in comparison to other Slovenian destinations, due to Nova Gorica leading gambling position – Need for small boutique accommodation providers, tourist farms and other tourism providers in Nova Gorica and whole Vipava Valley – New use of empty real estate for tourism
Visitors satisfaction	<p>Impacts</p> <ul style="list-style-type: none"> – The destination is only setting up a competent DMMO – no destination management and governance so far – Strategic location and multi-level connections that the destination has: cross border with Gorizia, towards Soča Valley, Brda, Vipava Valley and Karst – The biggest hotel & casino company HIT started developing leisure products and promoting its casino and other visitors to experience the wider destination in the years of 2015/2016 – highly individual approach and high satisfaction – The destination Nova Gorica is promoted also through visitors to other facilities of HIT (in Kranjska Gora and Maribor/Šentilj) <p>Challenges</p> <ul style="list-style-type: none"> – Understanding the destination and its profile

	<ul style="list-style-type: none"> – Changing the perception of Nova Gorica from a gambling destination to an attractive destination, opened to Gorizia, Vipava Valley, Karst, Soča Valley – with great outdoor opportunities, wine and gastronomy specialities
Local residents quality of life	<p>Impacts</p> <ul style="list-style-type: none"> – The gambling profile of Nova Gorica is not always seen as a positive socio factor in the municipality – Gambling industry brings the rise of nightlife and clubs with dubious activities, as well as more colourful structure of visitors – So far mostly positive view of tourism and its further potentials – outside gambling industry and in the whole Vipava Valley <p>Challenges</p> <ul style="list-style-type: none"> – Lack of parking spaces in the Nova Gorica city centre – where casinos are, and in time of events
Tourism industry opportunities	<p>Impacts</p> <ul style="list-style-type: none"> – New job opportunities, especially in the countryside – Green local supply chains <p>Challenges/opportunities</p> <ul style="list-style-type: none"> – Countryside tourism development of Vipava Valley – Development of thematic routes, such as Ultra Trail (along the valley), St. Martin's Trail – Cross-border cooperation – Joint application for ECC 2025 – The City Europe Market (Trg Evrope) as a symbol of cooperation of the 2 cities
Socio-political context	<p>Impacts</p> <ul style="list-style-type: none"> – The political establishments show very positive attitude and activities to promote cooperation between Gorizia-Nova Gorica – tourism should follow more boldly and actively <p>Challenges</p> <ul style="list-style-type: none"> – Turning past hardships and hatred (the 2 world wars) into future cooperation and new socio-economic opportunities – Motivation people of the two cities to cooperate and contribute in ECC 2025

Identification and verification of indicators and data sources

The carrying capacity indicators (from the indicators catalogue, as prepared by the ESPON SEBLU experts) have proven relevant. It needs to be highlighted that the Nova Gorica Municipality, as well as Vipava and Ajdovščina already are a member of GSST – with all GSST indicators already being monitored. Renče-Vogrsko Municipality has just started the process in 2020. The availability of indicators is limited to statistical indicators and indicators from the GSST, which also provide the tourism stakeholders' satisfaction studies. Thus, actually very few indicators could be used for calculations.

Additional comments and observations

The expert covered the destination Nova Gorica (with a wider marketing aspect of Vipava Valley, as explained in Step 1). Therefore, participants from the Slovenian side only were invited: key public, non-governmental and business stakeholders from the municipalities of Nova Gorica, Ajdovščina, Renče-Vogrsko, who together founded DMMO Nova Gorica and Vipava Valley.

The participants of the workshop Nova Gorica discussed the individual categories from the perspective of Nova Gorica (and Vipava Valley), but also added the cross-border aspect of the joint destination Gorizia – Nova Gorica. It is important to stress that this was actively integrated into the discussion and was not discussed as a separate category.

At the start of the project there was supposed to be a joint workshop with participants of Nova Gorica as well as Gorizia (in one location), but due to the COVID-19 pandemic, the joint workshop was not possible due to travelling restrictions. The two experts in charge of individual destinations (Nova Gorica and Gorizia) agreed to do the workshops separately, but to have a joint Skype/virtual meeting at the end of the workshop, to exchange views on the cross-border aspect. This is included in the final systemic picture (Figures 20 and 21).

The participants from the Slovenian side agreed that despite the fact that the project attempts to perceive the destination as a cross-border Gorizia-Nova Gorica destination, we could not ignore the fact that presently the destinations are managed separately.

Overall, one of the key components of any destination is a competent DMO/DMMO, with high level of governance in the day-to-day business. If there is no such organisation, we can only be talking about the project-based cooperation, developing joint products, seeking synergies, developing new joint opportunities – which is presently the case with Gorizia and Nova Gorica (e.g., the joint candidacy for ECC 2025). This can be regarded as the main takeaway from the workshops.

IV.3 Step 3

IV.3.1 Data collection

Gorizia

Three stakeholders of Gorizia who were interviewed and who participated in the workshop as documented in the previous steps were approached again by the project team, yet this time with the list of indicators. They were asked to mark those indicators that they deem important for their destination, as well as to indicate the level of importance of the individual indicator using the 5-point Likert scale (1 = not important at all, 5 = extremely important). This step enabled the project team to calculate the mean value for each indicator. Quite a few of the proposed indicators were ranked towards “extremely important” end of the Likert scale (i.e., values 4 and 5). More specifically, indicators with mean value ≥ 4 are as follows: (1) Instagram data, (2) tourist related open street map points-of-interest, (3) absolute number of bednights, (4) absolute number of arrivals, (5) average length of stay, (6) distribution of demand, (7) same day visitors/total number of visitors, (8) tourism density, (9) tourism intensity, (10) tourism revenues of product & service providers, (11) share of tourism contribution to GDP, (12) occupancy rate, (13) closeness to next airport, (14) closeness to next World Heritage Sites (WHS), (15) overall satisfaction of visitors and residents with tourism, and (16) number of residents. This information is also shown in Table A.47.

Table A.47: Most important indicators for the stakeholders in Gorizia

Indicator name	Source	Territorial unit	Time	Access to the data ¹²	Data integrated in the dashboard
Instagram data	Picodash	Gorizia and surrounding	Varies	No	Yes
Tourist related open street map points-of-interest	Open-StreetMap	Municipality	Static	Yes	Yes
Absolute number of bednights	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Absolute number of arrivals	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Average length of stay	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Distribution of demand	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Same day visitors/total number of visitors	X	Municipality	Annual, monthly	X	No
Tourism density	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Tourism intensity	PromoTurismo FVG	Municipality	Annual, monthly	Yes	Yes
Tourism revenues of product & service providers	X	Municipality	Annual	X	No
Share of tourism contribution to GDP	X	Municipality	Annual	X	No
Occupancy rate	X	Municipality	Annual, monthly	X	No
Closeness to next airport	X	Not applicable	Static	X	No
Closeness to next World Heritage Sites (WHS)	X	Not applicable	Static	X	No
Overall satisfaction of visitors and residents with tourism	X	Municipality	Varies	X	No
Number of residents	Municipality of Gorizia	Municipality	Annual	Yes	Yes

Source: Consortium (2020).

Most of the selected indicators are economic by nature, yet for instance, occupancy rate can be classified as both economic and environmental; seasonality as economic, environmental, and social, etc. Interestingly, purely environmental indicators (footprint, waste, water, energy) did not seem to be of a major importance to the stakeholders in Gorizia. The project team attempted to collect the data for all listed indicators and for multiple years; however, in the end this was possible for nine indicators due to unavailability of data and limited time. All collected

¹² Access to the data is only given if the data is open access data.

data have been integrated in the dashboard (i.e., the column “data integrated in the dashboard” in Table A.47 marks for which indicators data were collected). Along the same lines, fields marked with “X” denote information that is not available as data for the listed indicator were not collected. As is evident, the majority of the indicators are tourism performance indicators. In order to get a full picture of tourism impact on Gorizia, the project team also collected a number of territorial context indicators (e.g., ageing index, bedspace (plus change and intensity), enterprises, natural increase, population density, population, surface area, and waste). It should be noted that not all indicators are available in dashboard for all years that were of interest to the project team (i.e., 2008-2019). Thus, the list of indicators and corresponding time series for Gorizia can be found in Table A.48.

Table A.48: Indicators in the database (alphabetical order)

Indicator	Time series for Gorizia
Ageing Index	2008-2019
Population ≥ 65 /Population $\leq 14 * 100$	
<Methodological Explanations: Slovenia>	
Arrivals	2008-2019
Tourist Arrivals	
<Methodological Explanations: Slovenia>	
Arrivals Change, Overnights Change	2009-2019
Annual Change in %, Base Year is Previous Year	
Bedspace	2008-2019
Number of Indivisible Units and Bedspaces that are Available to Tourists	
<Methodological Explanations: Slovenia>	
Bedspace Change	2009-2019
Annual Change in %, Base Year is Previous Year	
Bedspace Intensity	2008-2019
Bedspace/Population	
Enterprises	2012-2017
Number of registered legal or natural person, which had either turnover or employment or investments during the reference year.	
<Methodological Explanations: Slovenia>	
Length of Stay	2008-2019
Overnights/Arrivals	
Natural increase	1999-2019
Difference between the Number of Births and Deaths	
<Births – Methodological Explanations: Slovenia> <Deaths – Methodological Explanations: Slovenia>	
Overnights	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Population	2008-2019
<Methodological Explanations: Slovenia>	
Population density	2008-2019
Population/Square Kilometer Surface	
Seasonality	2008-2019
Gini Coefficient based on Monthly Bednights	

Indicator	Time series for Gorizia
Surface area	2020
Square kilometer surface covered by the municipality's borders	
Tourism Density	2008-2019
Arrivals/Square Kilometer Surface of the Municipality	
Tourism Intensity	2008-2019
Arrivals/Population	
Waste	2008-2012
Municipal Waste Collected by Public Waste Removal Scheme (kg/capita)	
<Methodological Explanations: Slovenia>	

Source: Consortium (2020).

Nova Gorica

In this case again, the project team was responsible to collect data for Nova Gorica. The focus was placed on the indicators that were marked as important for their destination by the stakeholders of Nova Gorica: (1) number of tourists/visitors per 100 residents, (2) visitors per attraction, (3) arrivals, (4) overnights, (5) average length of stay, (6) arrivals growth in %, (7) overnights growth in %, (8) growth in number of beds in hotels in the last five years in %, (9) number of beds in tourist farms per resident, (10) number of joint cross-border projects and initiatives and lastly, (11) number of visitors on cross-border tours/packages. This information is also summarized in Table A.49 and provides therefore an overview of the stakeholders preferences.

Table A.49: Most important indicators for the stakeholders in Nova Gorica

Indicator name	Source	Territorial unit	Time	Access to the data ¹³	Data integrated in the dashboard
Number of tourists/visitors per 100 residents	Municipality	Municipality	Annual	Available	Yes
Visitors per attraction	Attraction operator	Attraction	Annual, monthly	X	No
Arrivals	SORS	Municipality	Annual, monthly	Available	Yes
Overnights	SORS	Municipality	Annual, monthly	Available	Yes
Average length of stay	SORS	Municipality	Annual, monthly	Available	Yes
Arrivals growth in %	SORS	Municipality	Annual, monthly	Available	Yes
Overnights growth in %	SORS	Municipality	Annual, monthly	Available	Yes
Growth in number of beds in hotels in the last 5 years in %	Municipality	Municipality	Yearly	Available	Yes
Number of beds in tourist farms per resident	Municipality	Municipality	Yearly	X	No
Number of joint cross-border projects and initiatives	Municipality	Municipality	Yearly	X	No

¹³ Access to the data is only given if the data is open access data.

Indicator name	Source	Territorial unit	Time	Access to the data ¹³	Data integrated in the dashboard
Number of visitors on cross-border tours/packages	Municipality	Municipality	Yearly	X	No

Source: Consortium (2020).

As is evident, the predominant nature of the indicators is economic. Same as in the case of Gorizia, the project team attempted to collect data for multiple years (i.e., 2008-2019) and for as many indicators as possible. In the end, 7 of out of 11 indicators selected by the stakeholders of Nova Gorica were collected and integrated in the dashboard (i.e., the column “data integrated in the dashboard” in Table A.49 marks for which indicators data were collected). Fields marked with “X” denote information that is not available as data for the listed indicator were not collected. As almost all (6 of 7) indicators are tourism performance indicators, the project team also opted to collect a number of territorial context indicators, as only then one can discuss the overall tourism impact on Nova Gorica. Such indicators include for instance: ageing index, bedspace (plus change and intensity), employment (and employment ratio), enterprises, green certificate, income, natural increase, population (and population density), surface area, turnover, unemployment, and waste. In summary, the list of both tourism performance and territorial context indicators and corresponding time series for Nova Gorica can be found in Table A.50 below. This table considered the stakeholders preferences in Table A.15 but only indicators where data is available could be integrated into the database.

Table A.50: Indicators in the database (alphabetical order)

Indicator	Time series for Nova Gorica
Ageing Index	2008-2019
Population ≥ 65 /Population $\leq 14 * 100$	
<Methodological Explanations: Slovenia>	
Arrivals	2008-2019
Tourist Arrivals	
<Methodological Explanations: Slovenia>	
Arrivals Change, Overnights Change	2009-2019
Annual Change in %, Base Year is Previous Year	
Bedspace	2008-2017
Number of Indivisible Units and Bedspaces that are Available to Tourists	
<Methodological Explanations: Slovenia>	
Bedspace Change	2009-2017
Annual Change in %, Base Year is Previous Year	
Bedspace Intensity	2008-2017
Bedspace/Population	
Employment	2005-2019
Persons in Employment by Municipalities of Employment	
<Methodological Explanations: Slovenia>	
Employment Ratio	2002-2016
% of Labour Force within the Working Age Population	
<Methodological Explanations: Slovenia>	

Indicator	Time series for Nova Gorica
Enterprises	2008-2018
Number of registered legal or natural person, which had either turnover or employment or investments during the reference year.	
<Methodological Explanations: Slovenia>	
Green Certificate	2020
Tourism Providers with Slovenia Green Label	
<Methodological Explanations: Green Scheme of Slovenian Tourism>	
Income	2005-2019
Average Monthly Cross Earnings	
<Methodological Explanations: Slovenia>	
Length of Stay	2008-2019
Overnights/Arrivals	
Natural increase	1995-2018
Difference between the Number of Births and Deaths	
<Births – Methodological Explanations: Slovenia> <Deaths – Methodological Explanations: Slovenia>	
Overnights	2008-2019
Tourist Overnights	
<Methodological Explanations: Slovenia>	
Population	2008-2019
<Methodological Explanations: Slovenia>	
Population density	2008-2019
Population/Square Kilometer Surface	
Seasonality	2008-2019
Gini Coefficient based on Monthly Bednights	
Surface area	2020
Square kilometer surface covered by the municipality's borders	
Tourism Density	2009-2019
Arrivals/Square Kilometer Surface of the Municipality	
Tourism Intensity	2008-2019
Arrivals/Population	
Turnover	2008-2018
...of enterprises (1,000 EUR) is the total amount that the enterprise settled with sale of goods, material and performed services in the reference year. It is measured on the basis of selling prices stated on invoices and other documents less discounts at sale or later on and the value of returned quantities. It includes all costs and charges linked to the buyer and excludes all duties and taxes on the goods or services invoiced by the unit and value added tax, possible sale of fixed assets, financial turnover, subsidies and other extra turnover. Data on turnover of enterprises from 2013 also included turnover of banks and savings banks.	
<Methodological Explanations: Slovenia>	
Unemployment	2005-2016
% of Registered Unemployed within the Active Population	
<Methodological Explanations: Slovenia>	
Waste	2008-2018
Municipal Waste Collected by Public Waste Removal Scheme (kg/capita)	
<Methodological Explanations: Slovenia>	

Source: Consortium (2020).

IV.3.2 Tourist flow estimation (Gorizia and Nova Gorica)

There are different ways one can estimate tourist flows (e.g., by inspecting arrivals, bednights, average length of stay, distribution of demand (i.e., seasonality), etc.). From the lists of indicators that were deemed important by the stakeholders in both Gorizia and Nova Gorica, it is evident that a lot of emphasis has been put on tourist flows. Therefore, a closer look at tourist flows can be taken by using the data that is already available in the dashboard. Note: scale of y-axis may differ between the plots for two municipalities, so one should take that into account in interpretations.

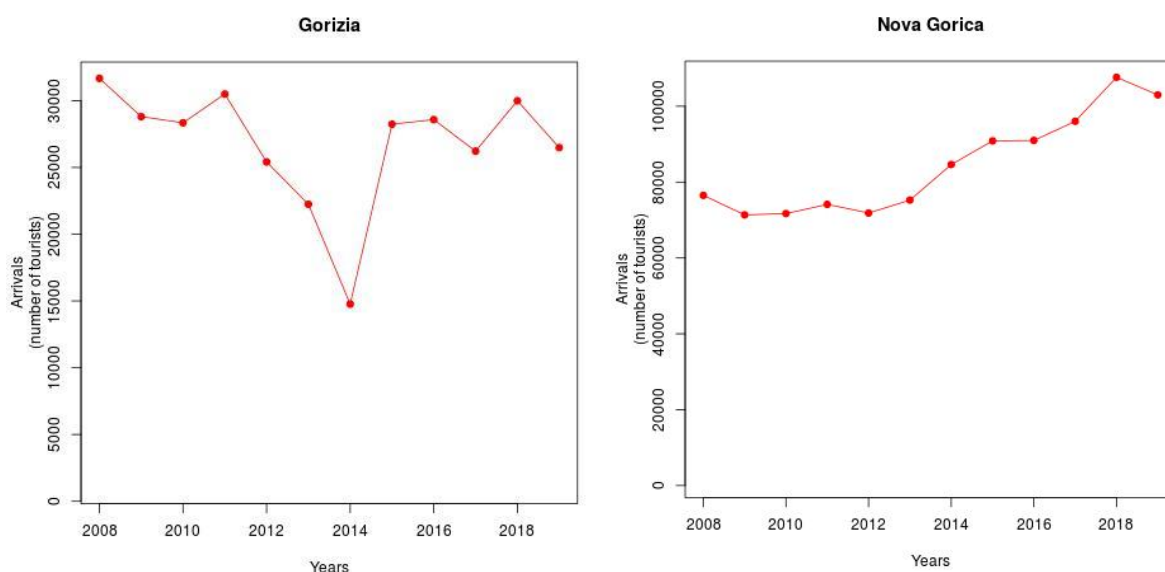
For the period 2008 to 2019, arrivals in Gorizia were at the peak in 2008 (see Figure A.110). Since then, one can observe a major decrease until 2014 (with the exception of 2011), followed by a steep increase in 2015. This signals a re-discovery of interest in Gorizia as a tourist destination at the time, which could have been triggered by various reasons (e.g., marketing campaigns, more offers for visitors, etc.). However, the figure from 2008 was not reached again in the observed period. Regarding Nova Gorica, the absolute number of arrivals was much higher than in Gorizia throughout the whole period. The lowest number of arrivals was recorded in 2009, whereas the highest was reached in 2018. So unlike Gorizia, arrivals in Nova Gorica have grown steadily, thus, one should keep an eye on the development of this particular indicator but with a different focus for each of the two.

Regarding overnights, similar trends can be detected in both municipalities (see Figure A.111): on one hand, in Gorizia, the highest number of bednights was recorded in 2008, which continued to decrease until 2014 (again, with the exception of 2011, when the second highest peak was reached regarding number of overnights). The lowest numbers of overnight stays in Gorizia were recorded in 2014 and 2017, respectively. On the other hand, in Nova Gorica, 2010 and 2018 are the two years with the lowest and the highest number of overnights. As with arrivals, one can observe a steady growth in bednights in Nova Gorica, especially after 2013.

Furthermore, the average length of stay in Gorizia was at its highest in 2008 and 2014, whereas the lowest length of stay was recorded in 2017 (see Figure A.112). As is evident, quite a different situation again in Nova Gorica: length of stay was relatively stable, at its lowest in 2015 and at its highest in 2018. Taking into account the insights gained from inspecting arrivals, overnights, and length of stay, it can be said that Gorizia is a typical example of a destination that is still in its turbulent development stages struggling with building up a solid number of tourist inflows, whereas trends in the case of Nova Gorica are far steadier, settled and constantly increasing. The same is true when it comes to the length of stay. Nova Gorica is settled in terms of the length of stay, whereby Gorizia lost several rank places in comparison to all other municipalities contained in the database. A decreasing length of stay means higher number of visitors who stay only for one night. Such short visits, especially when combined with daily visitors (=excursionists), do not generate much economic value for destinations, whilst at the same time cause more pressure on the environment. Such scenarios are not desirable for any destination. Given that Gorizia in particular wants to develop slow tourism (→need 1, discussed

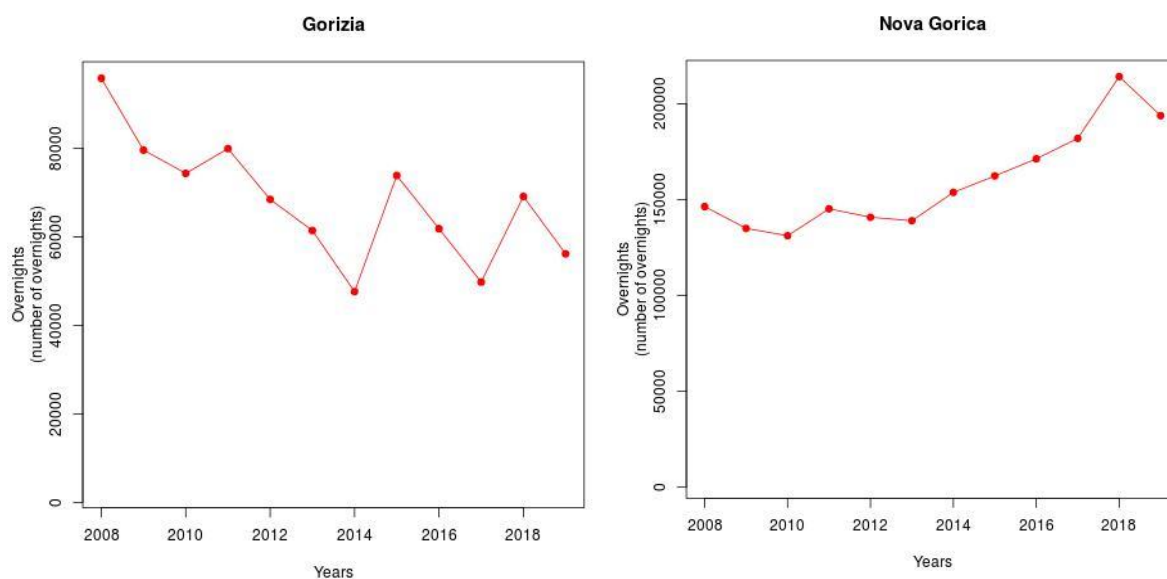
in step 4), length of stay (derivative of two core indicators of tourism demand: overnights and arrivals) would be one of the typical indicators to observe over time.

Figure A.110: Arrivals 2008-2019



Source: Consortium (2020).

Figure A.111: Overnights 2008-2019

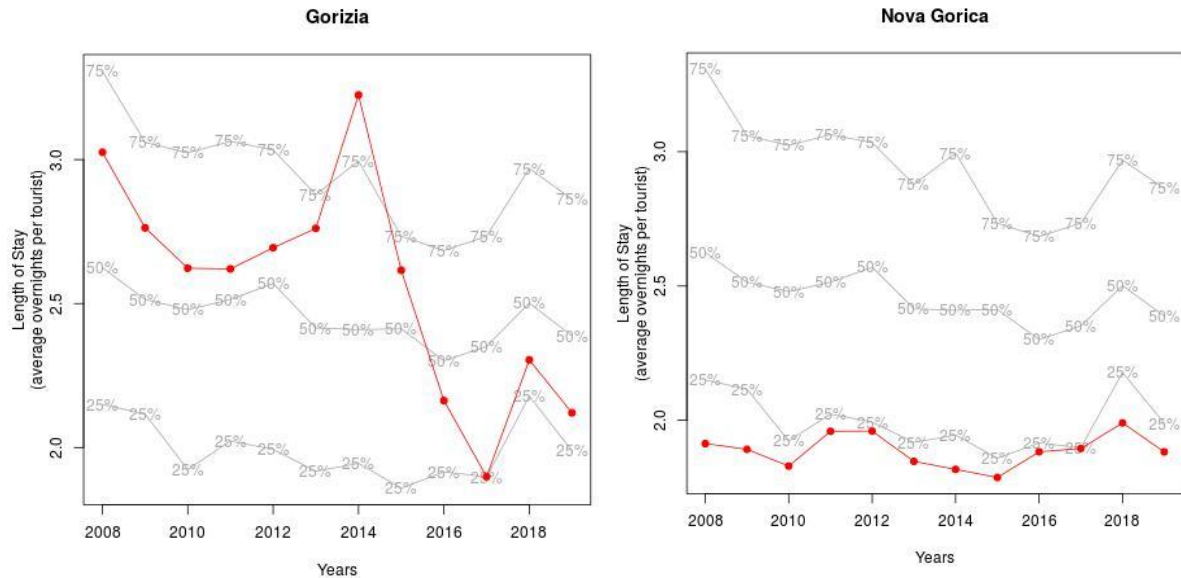


Source: Consortium (2020).

Distribution of demand (i.e., seasonality) should also be inspected when looking into tourist flows. Seasonality is defined as the Gini Coefficient based on monthly overnights. The Gini Coefficient, G , is a measure of statistical dispersion, which is defined for the range: $0 \leq G \leq 1$, with the extreme value $G = 0$ representing a completely equal distribution of monthly overnights throughout a year (i.e., no seasonality) and the extreme value $G = 1$ representing a completely unequal distribution of monthly overnights throughout a year (i.e., “absolute” seasonality with tourists coming in only one month of year). Regarding seasonality in both municipalities (see

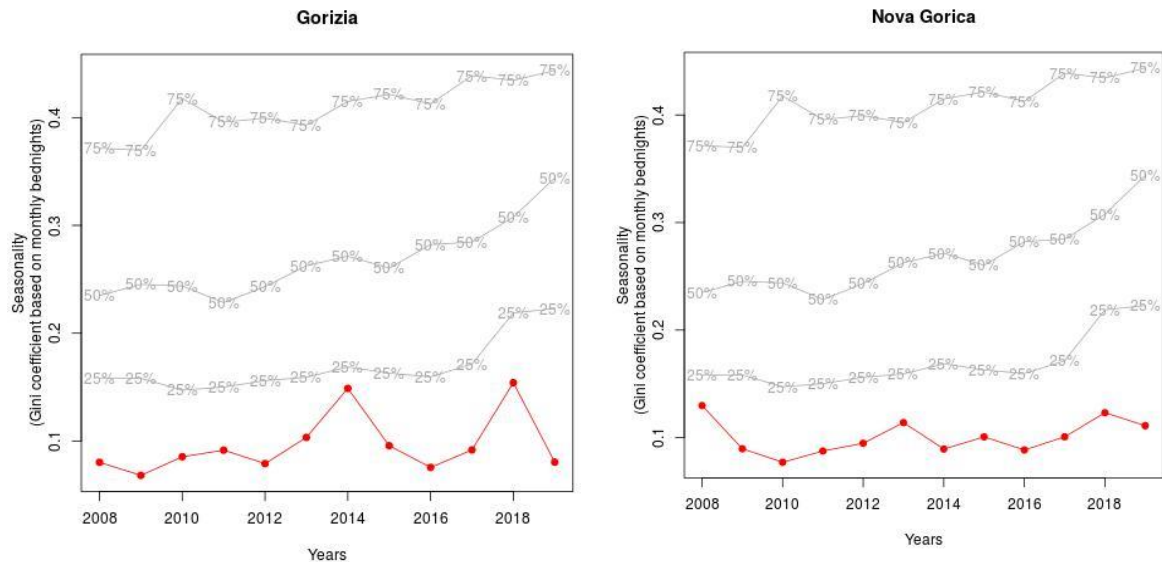
Figure A.113), it can be observed that the Gini Coefficient values have been on the lower end (Gorizia: the highest value in 2018 = 0.15; Nova Gorica: the highest value in 2008 = 0.13). This would imply that both destinations do not really have major problems with distribution of demand throughout the year and is certainly a positive aspect in the discussion on carrying capacity.

Figure A.112: Length of stay 2008-2019



Source: Consortium (2020).

Figure A.113: Seasonality 2008-2019

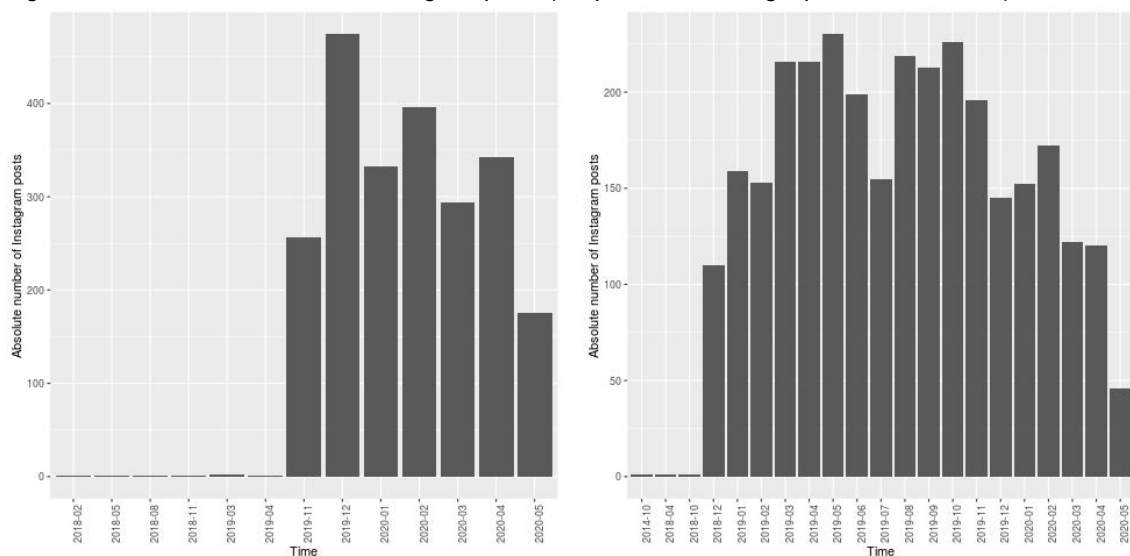


Source: Consortium (2020).

Additional insights about both length of stay and seasonality can be gained using the “quartile benchmark” option. If this option is selected in the dashboard, the 25%, 50%, and 75% quartiles are determined (out of all municipalities for which data are available for the respective year) and these values are displayed over the years. Quartiles are determined by ranking all

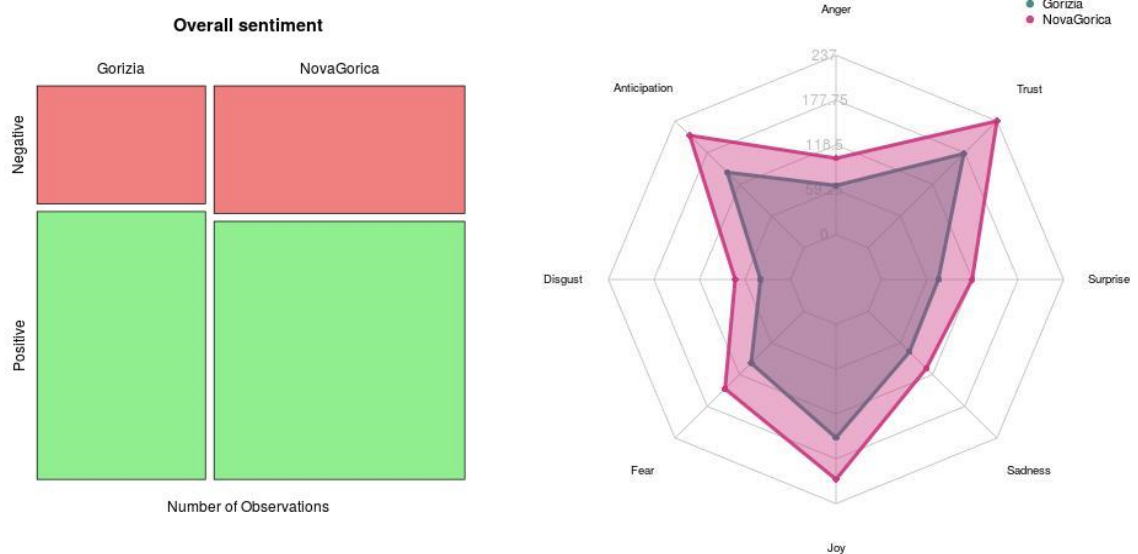
municipalities according to the selected indicator and determining the threshold that separates the 25% of those municipalities scoring lowest on the selected indicator from the rest, the 50% threshold that cuts the ranked indicator in the middle and in this way splits all municipalities half-half (the so-called median), and the 75% threshold separating the highest scoring 25% from the rest. Hence, regarding length of stay in Gorizia, it is evident from the above plot that the values of this indicator were varying over the observed period, ultimately ending in 2019 just above the 25% quartile compared to the Slovenian municipalities. The opposite holds true for Nova Gorica: values of this indicator values have been consistently way below the 25% quartile compared to the Slovenian municipalities. The latter (i.e., below the 25% quartile) is also the case when inspecting the seasonality in both municipalities.

Figure A.114: Absolute number of Instagram posts (left plot = Gorizia, right plot = Nova Gorica)



Source: Consortium (2020).

Figure A.115: Instagram-based overall sentiment and basic emotions

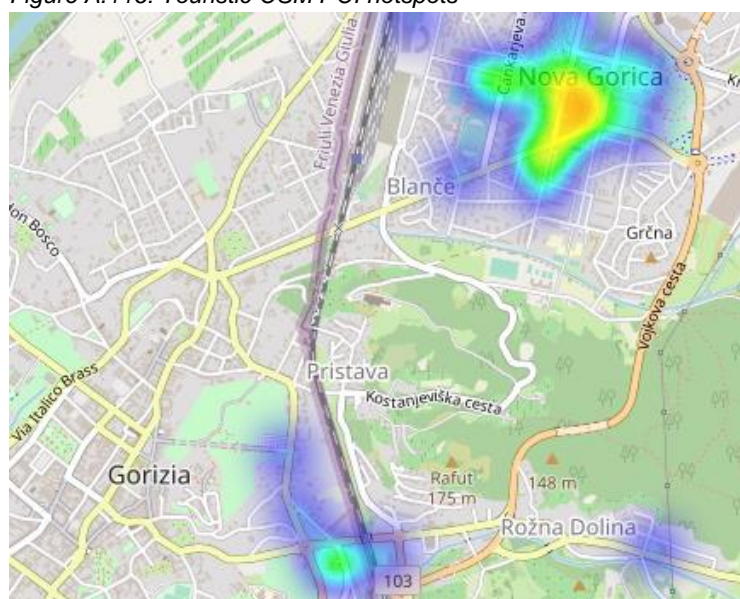


Source: Consortium (2020).

In addition, Instagram data and tourist related open street map points-of-interest can give some indication of what is happening at the destination regarding the tourist flows at specific locations within the destination. These two variables were also marked as important by the stakeholders in Gorizia. Figure A.114 and Figure A.115 bring additional insights into more recent tourist flows in Gorizia and Nova Gorica. First, it can be observed that the time series for Instagram posts is rather short, especially in the case of Gorizia, yet very recent (i.e., also covers the months of COVID-19 pandemic). Interest among the Instagram users has been moderate even through the first months of pandemic, but then it started to decline sharply for both destinations after the Easter holiday. Overall sentiment detected in these posts was mostly positive (plot below displays the ratio between positive and negative statements for each municipality). The broadness of each bar (each municipality) represents the number of emotive terms. The broader the bar, the more emotive terms were detected by the sentiment algorithm in the Instagram posts (the ratio between Gorizia and Nova Gorica is similar to the number of posts contained in the database, assuming that posts for both destinations contain a similar number of emotive terms). Moreover, if looking deeper into emotions detected in these posts, it can be observed that the majority of posts contain terms that relate to trust, joy, and anticipation. This type of analysis could help in detecting any problem areas at destinations (e.g., disgust with waste, anger with long queues, fear from Corona, etc.).

The density of tourism-related OpenStreetMap (OSM) Points-of-Interest (POIs) as well as of Instagram hotspots is displayed in the heat maps depicted in Figure A.116 and Figure A.117. When compared to blue and green areas, yellow ones highlight more dense areas of POIs or Instagram posts. Based on these maps, people seem to “talk” about Gorizia and Nova Gorica (i.e., Instagram hotspots), yet tourist locations in Gorizia are not communicated in contrast to those of Nova Gorica (hotspots based on OSM POIs).

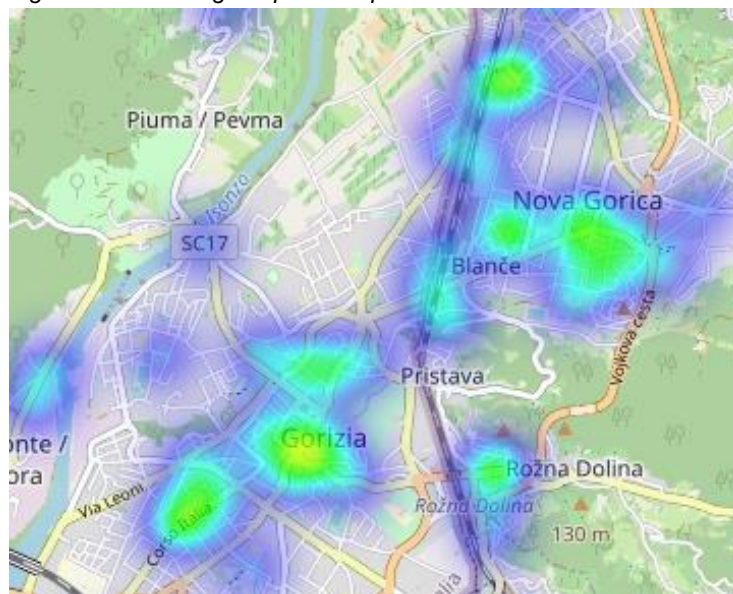
Figure A.116: Touristic OSM POI hotspots



Source: Consortium (2020).

In line with the desk research and the interviews, it is evident from these heat maps that currently there are no problems with tourist flows, no areas that are marked in red, which would be one of the signals that the carrying capacity may be endangered due to overcrowding. Further analyses are needed though (step 4), as inspection of single indicators is not sufficient to get a full grasp of tourism impact on either of destinations. Before moving onto step 4, tourist flow prediction can give insights into developments over the next three years. With that goal in mind, a brief preview of forecasts of arrivals and overnights, two core indicators of tourism demand, is presented in continuation.

Figure A.117: Instagram post hotspots



Source: Consortium (2020).

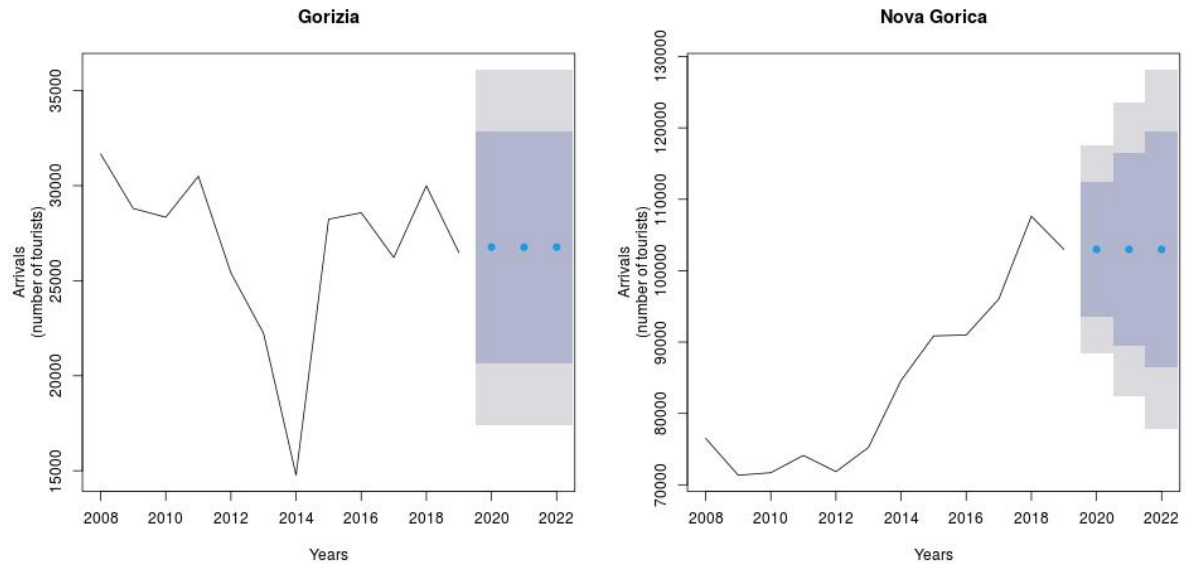
IV.3.3 Tourist flow prediction (Gorizia and Nova Gorica)

Out-of-sample annual forecasts for arrivals and overnights for the next three years are produced using the “forecast” package for R and its “forecast” function. In more detail, point and interval forecasts (80% and 95% confidence intervals) are calculated for a forecast horizon of three periods ahead, while being robust against missing values and outliers in the forecast variable.

The forecast model employed is selected automatically from a range of 30 possible specifications of the univariate Error Trend Seasonal (ETS) forecast model class by minimizing the Corrected Akaike Information Criterion (AICc), which is suitable for small samples. The ETS forecast model class, which comprises all traditional exponential smoothing models, is a state-space framework consisting of one signal equation for the forecast variable, as well as of one up to three state equations for the unobservable components of the forecast variable. The parameters of the different ETS specifications are estimated using maximum likelihood methods.

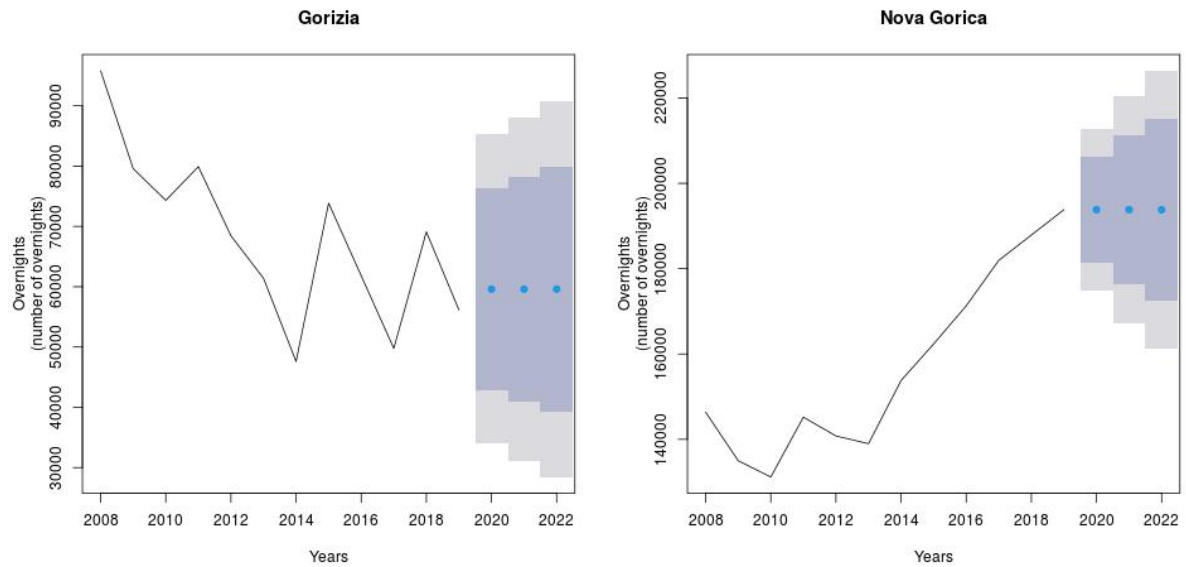
All forecasts are based on historical data which is only available until the end of 2019, therefore the COVID-19 pandemic of 2020 cannot be depicted in this forecast, which has to be taken with a grain of salt.

Figure A.118: Forecasts of arrivals



Source: Consortium (2020).

Figure A.119: Forecasts of overnights



Source: Consortium (2020)

Both arrivals (see Figure A.118) and overnights (see Figure A.119) are forecast to start levelling off, remain constant over the next three years. However, as already mentioned, a word of caution is in order here: forecasts for both indicators are based on historical data that go until the end of 2019. This means that the impact of COVID-19 could not be considered in forecasts. The more likely scenario will be a short-term decrease in arrivals and overnights, as it was the case during the financial crisis (2008-2010). Given the strong domestic market in Gorizia in general, the impact of COVID-19 crisis on tourism in Gorizia may not turn out to be substantial, in contrast to Nova Gorica that relies heavily on foreign source markets. Yet, one should not disregard the encouragement of many governments for citizens to vacation within their home countries, which may turn out to be a remedy for both destinations.

IV.4 Step 4

As detailed in steps 1 and 2, different sets of needs were identified for Gorizia and Nova Gorica based on desk research and interviews with the key stakeholders. For that reason, destinations are analysed separately in the forthcoming sub-steps before concluding this step by pointing towards the overlaps in needs between the two.

Gorizia

IV.4.1 Combining tourism and territorial context indicators into tourism impact

The following four key needs were identified for Gorizia:

- (1) Need for developing slow tourism;
- (2) Need for new tourism infrastructure;
- (3) Need for coordinated efforts with other provinces in FVG;
- (4) Need for cross-border governance.

Concerning possible pairs of tourism performance and territorial context indicators to be analysed jointly, the following suggestions can be made to assess the needs as identified by the stakeholders in Gorizia (note: underlined indicators are not currently available in the dashboard for Gorizia):

- Arrivals or arrivals change/bedspace or bedspace change or enterprises → needs 1 and 2
- Overnights or overnights change/bedspace or bedspace change or enterprises → needs 1 and 2
- Length of stay/bedspace or bedspace change or enterprises → needs 1 and 2
- Arrivals/population (i.e., tourism intensity) → needs 1 and 2
- Arrivals/surface area (i.e., tourism density) → needs 1 and 2
- Tourism intensity/bedspace or enterprises → needs 1 and 2
- Tourism density/bedspace or enterprises → needs 1 and 2
- Number of joint cross-border projects and initiatives/population or surface area → needs 3 and 4
- Number of visitors on cross-border tours/packages/population or surface area → needs 3 and 4

As is evident, there are several indicators/indicator pairs that could be used to address the aforementioned needs 1 and 2 on slow tourism and new tourism infrastructure. However, that is not the case with needs 3 and 4 (coordinated efforts with other provinces in FVG, cross-border governance). None of the currently available indicators in the dashboard go into this direction (nor were they mentioned by the stakeholders in Gorizia). In general, one could propose two indicators that were mentioned by the stakeholders in neighbouring Nova Gorica: (1) number of joint cross-border projects and initiatives and (2) number of visitors on cross-border tours/packages. Events should also be considered in the category of projects and initiatives. One could attempt to obtain this data either from KIT or directly from the municipality (if available). If data for these indicators is collected, then these indicators could be plotted against population or surface area in order to inspect the needs 3 and 4.

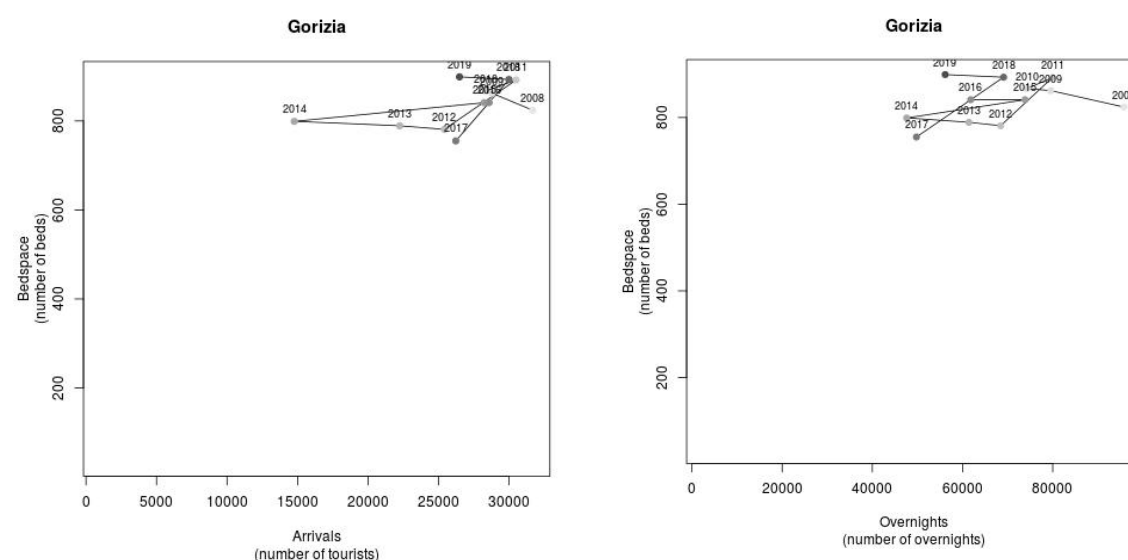
All suggested indicator pairs for needs 1 and 2 can be easily downloaded from the dashboard for each year that is available for the destination. Several such examples can be found in the

continuation, for some of which density graphs are used, both in this sub-step and in IV.4.4 (due to the possibility to benchmark).

Each blue dot in density graphs represents the combination of the two selected indicators of all municipalities available in the database for the displayed year. The big black dot represents the selected municipality (i.e., Gorizia). The density is calculated using a two-dimensional kernel density estimation. Red areas highlight dense areas of municipalities, yellow ones are sparsely populated. A municipality located within/outside the red area is a common/uncommon municipality.

In the first example, the arrivals and overnights indicators are plotted against bedspaces. As can be seen throughout the observed period, in spite of differences (primarily declines) in arrivals and overnights, changes in bedspaces were moderate and at its peak in 2019. Thus, this would imply that according to these indicator pairs, so far there has been no indication of major pressures on Gorizia's carrying capacity.

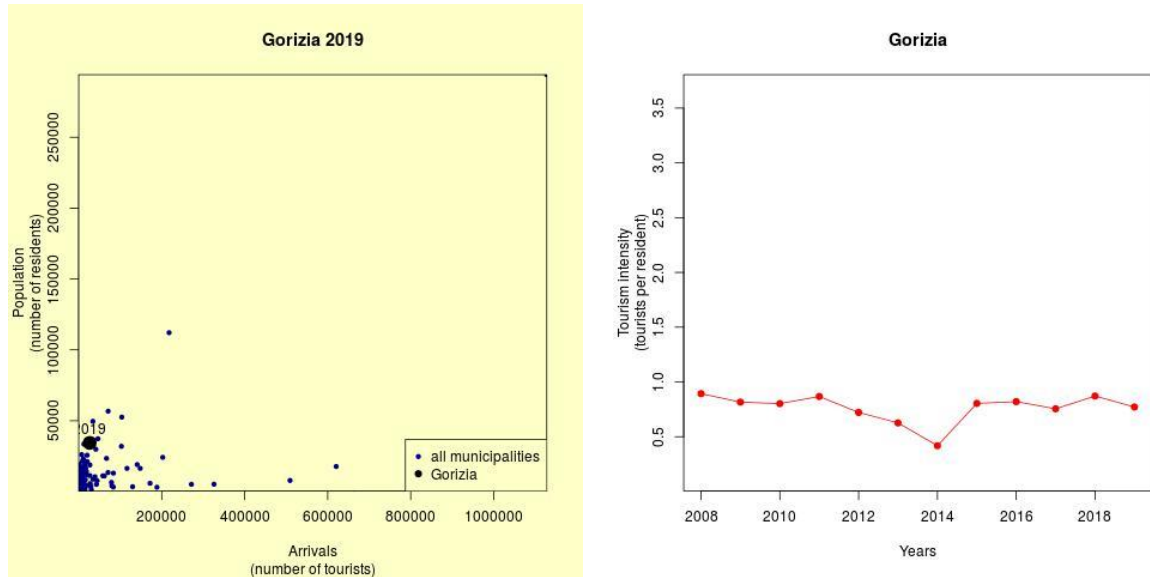
Figure A.120: Arrivals/bedspace, overnights/bedspace Gorizia → needs 1 and 2



Source: Consortium (2020).

Same applies when plotting arrivals against population for 2019 (see Figure A.121). Plot on the left implies relatively high population and arrivals figures. This per se could sound somewhat alarming regarding the discussion on carrying capacity. Therefore, it is of utmost importance to look into development over time (plot on the right). Inspection of tourism intensity (derivative of arrivals and population) does not point towards significant changes over time (the highest intensity was in 2008). If tourism intensity starts increasing in the coming years, this will be a signal towards increasing pressure on the destination, thus, leading to endangering its carrying capacity. However, based on forecasts, this is not to be expected in a short-term period (forecast to level off).

Figure A.121: Arrivals/population, tourism intensity Gorizia → needs 1 and 2

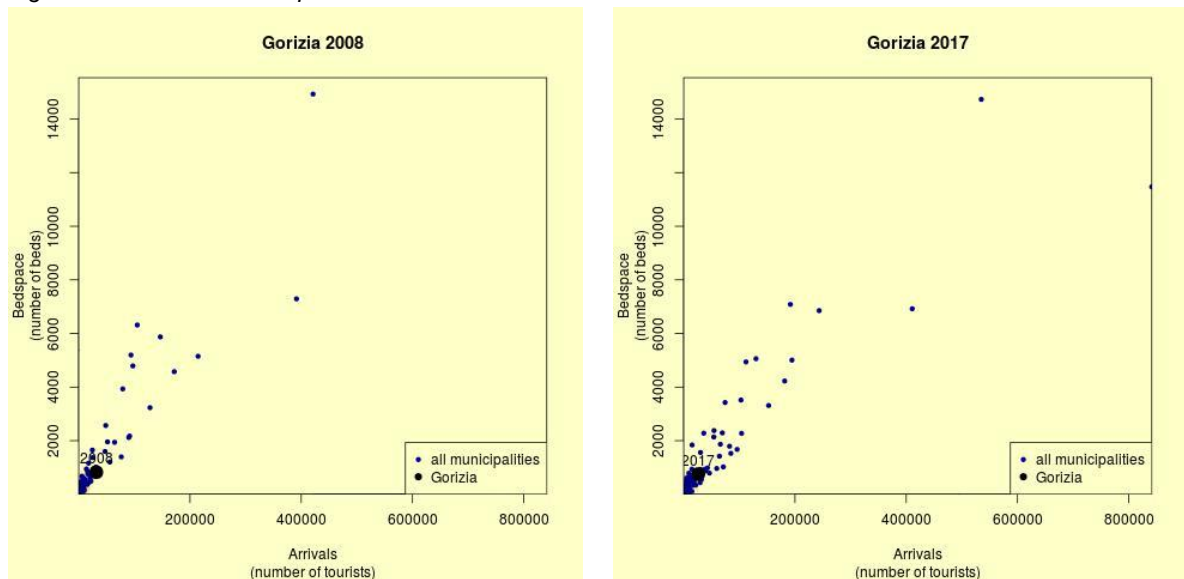


Source: Consortium (2020).

IV.4.2 Interpreting tourism impact with benchmarking

Additional insights into tourism impact can be gained by further inspecting the aforementioned density graphs, which depict the position of Gorizia in relation to the Slovenian municipalities over time. In the example below, the arrivals indicator is plotted against bedspaces for 2008 and 2017 (Figure A.122). As can be observed, the position of Gorizia in the two plots does not differ much when comparing these two years. Gorizia does differ somewhat from the municipalities in Slovenia: its arrivals and bedspaces are slightly higher than the Slovenian average. According to this indicator pair, it can be argued that so far there has been no indication of major pressures on Gorizia’s carrying capacity.

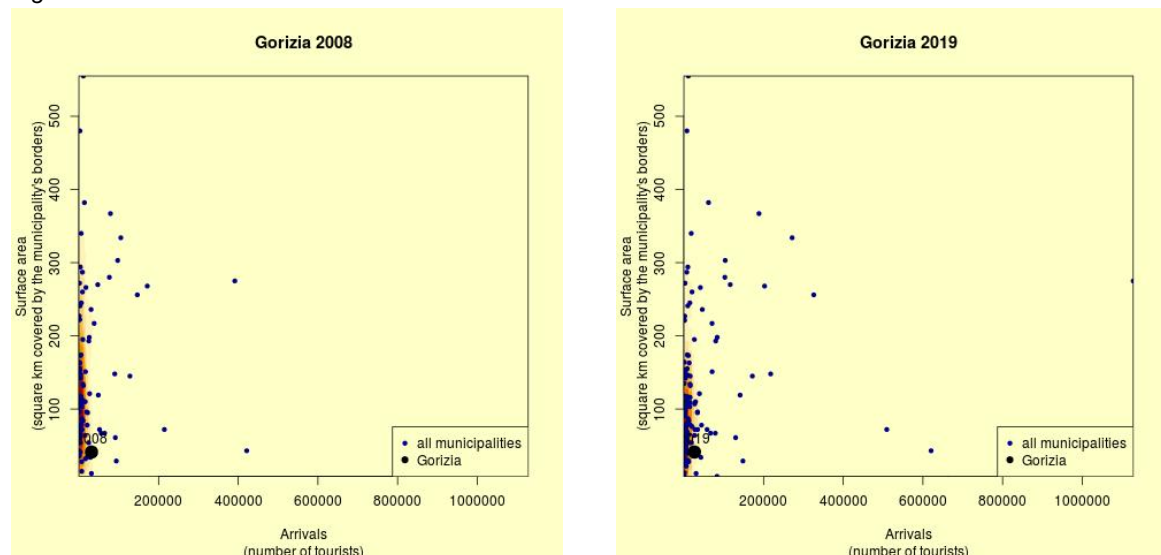
Figure A.122: Arrivals/bedspace Gorizia → needs 1 and 2



Source: Consortium (2020).

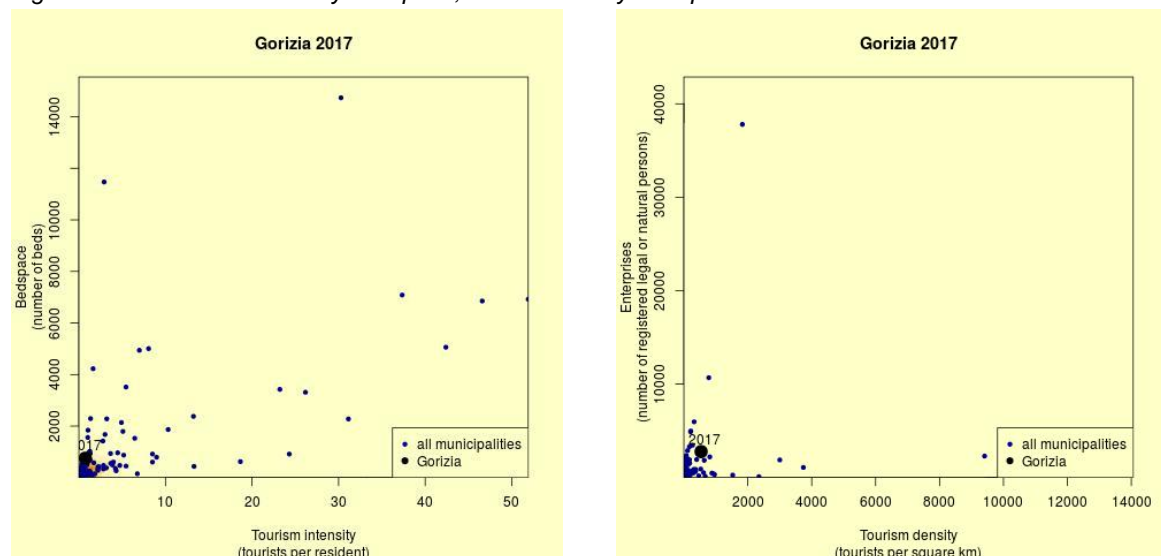
Furthermore, plotting of arrivals and surface area indicator pair also demonstrates that Gorizia differs somewhat from other municipalities in the sample (see Figure A.123): its arrivals may be a bit higher than the average, yet its surface area is on the lower end, irrespective of the year of the analysis. Yet, inspection of time series for tourism density (derivative of arrivals and surface area; forecast to level off) does not point towards any major problem here. Lastly, Figure A.124 below depicts two more indicator pairs: tourism intensity/bedspaces and tourism density/enterprises, as they can give more insights into the status quo regarding tourism impact on infrastructure. Yet again, Gorizia is not a common municipality (bedspaces are higher than the average; same is applicable to its tourism density and enterprises). The problematic future scenario for the carrying capacity of Gorizia would be a decrease or no change in bedspaces and enterprises, combined with the increasing tourism intensity and density. Based on historical data, this scenario does not seem likely though.

Figure A.123: Arrivals/surface area Gorizia → needs 1 and 2



Source: Consortium (2020).

Figure A.124: Tourism intensity/bedspace, tourism density/enterprises Gorizia → needs 1 and 2



Source: Consortium (2020).

Nova Gorica

IV.4.3 Combining tourism and territorial context indicators into tourism impact

The following five key needs were identified for Nova Gorica:

- (1) Need for a competent body in tourism, dedicated to destination management and governance;
- (2) Need for product diversification of the destination;
- (3) Need for strengthening cooperation and developing joint cross-border products;
- (4) Good sustainability measures, but need to transfer sustainability actions into more value and incentives for visitors;
- (5) Need for active visitor flow management and spread of the flows in Vipava Valley, and in a wider region.

Concerning possible pairs of tourism performance and territorial context indicators to be analysed jointly, the following suggestions can be made to assess the needs as identified by the stakeholders in Nova Gorica (note: underlined indicators are not currently available in the dashboard for Nova Gorica):

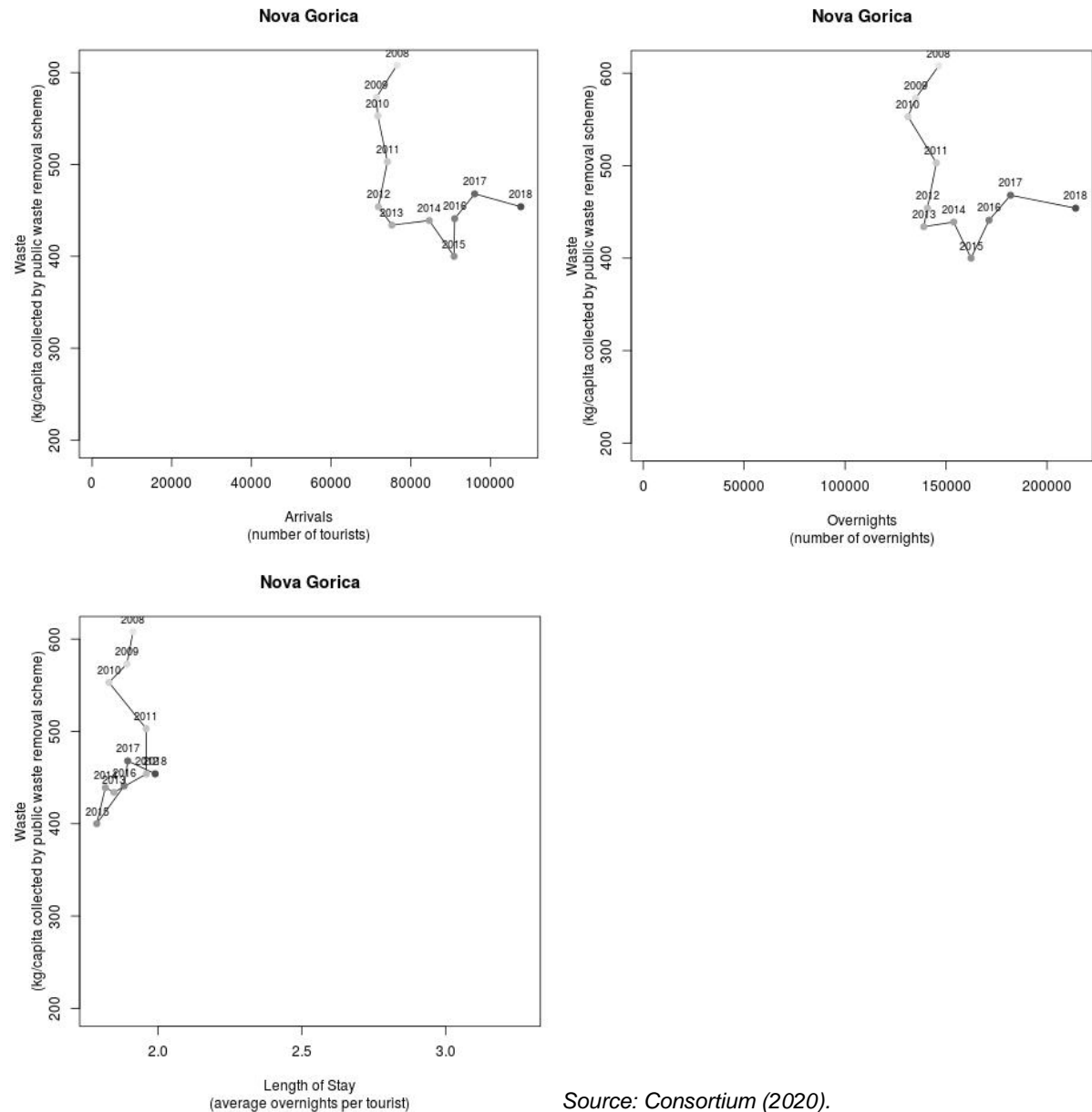
- Number of joint cross-border projects and initiatives/population or surface area → need 3
- Number of visitors on cross-border tours/packages/population or surface area → need 3
- Arrivals or overnights or length of stay/green certificate → need 4
- Arrivals or overnights or length of stay/waste → need 4
- Arrivals/population (i.e., tourism intensity) → need 5
- Arrivals/surface area (i.e., tourism density) → need 5
- Length of stay/surface area → need 5
- Arrivals or arrivals change/bedspace or bedspace change → need 5
- Overnights or overnights change/bedspace or bedspace change → need 5

As is evident, there are several indicators/indicator pairs that could be used to address the aforementioned needs 4 and 5 on good sustainability measures and active visitor flow management. This is not the case though with the needs 1-3 (competent body in tourism, product diversification, strengthening cooperation). None of the currently available indicators in the dashboard go into this direction. As already noted in the case of Gorizia, one could propose two indicators that were actually mentioned by the stakeholders of Nova Gorica: (1) number of joint cross-border projects and initiatives and (2) number of visitors on cross-border tours/packages. Events should also be considered in the category of projects and initiatives. One could attempt to obtain this data either from KIT or directly from the municipality (if available). If data for these indicators is collected, then these indicators could be plotted against population or surface area in order to inspect the need 3 (strengthening cooperation). No indicator pair can be proposed for addressing the first two needs in the context of carrying capacity, which is also understandable as not every need can be translated into indicators and quantified.

All suggested indicator pairs for needs 4 and 5 can be easily downloaded from the dashboard for each year that is available for the destination. A few examples can be found in the continuation, for some of which density graphs are used, both in this sub-step and in IV.4.4 (due to the possibility to benchmark).

Each blue dot in density graphs represents the combination of the two selected indicators of all municipalities available in the database for the displayed year. The big black dot represents the selected municipality (i.e., Nova Gorica). The density is calculated using a two-dimensional kernel density estimation. Red areas highlight dense areas of municipalities, yellow ones are sparsely populated. A municipality located within/outside the red area is a common/uncommon municipality.

Figure A.125: Arrivals/waste, overnights/waste, length of stay/waste Nova Gorica → need 4



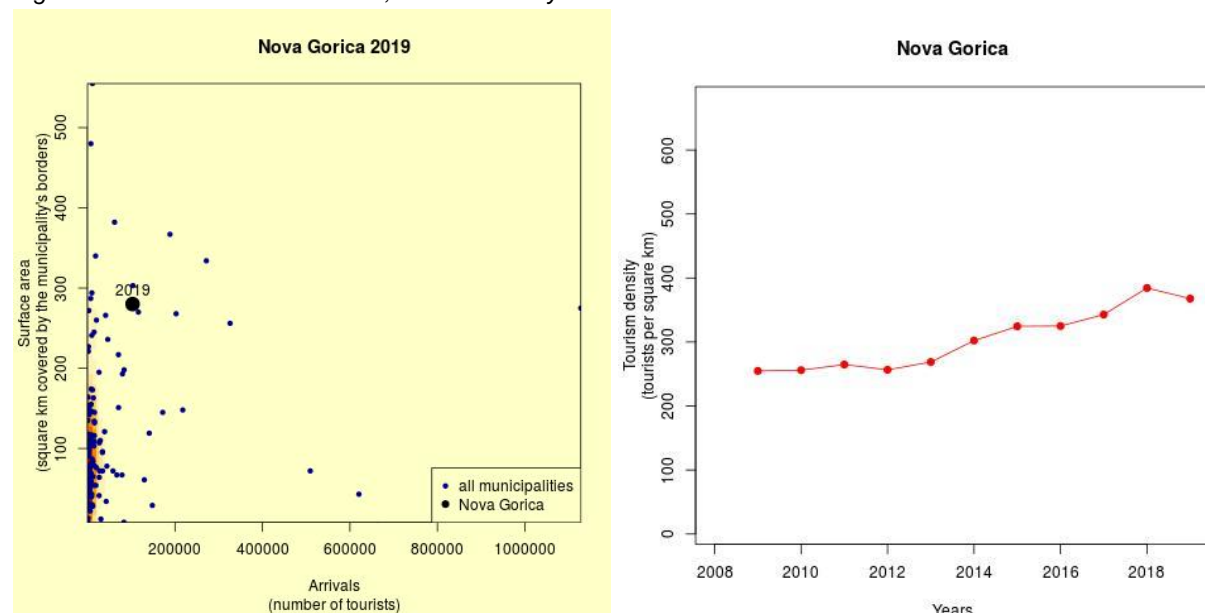
Source: Consortium (2020).

In the first example (see Figure A.125), arrivals, overnights, and length of stay indicators are plotted against waste (municipal waste collected by public waste removal scheme (kg/capita)). As can be seen throughout the observed period (2008-2018), there is a rather positive trend where in spite of the predominant increases in arrivals and overnights, waste had a decreasing

trend. This can serve as an indication that more visitors at the destination do not necessarily generate more waste, as is evident in Nova Gorica.

Another example which can be visualized is the combination of arrivals and surface area, with the purpose of investigating pressures on the environment (see Figure A.126). As is shown in the left plot for 2019, Nova Gorica is atypical destination compared to other Slovenian municipalities, with relatively high visitor numbers and relatively large surface area. This, however, is one moment in time (i.e., 2019) and requires a deeper inspection of development of tourism density (derivative of arrivals and surface area) over time, which points towards an increasing trend (right plot). As per forecast, tourism density is to level off though, however, one should still keep an eye on the future development of this indicator to counteract an upcoming pressure of tourism density.

Figure A.126: Arrivals/surface area, tourism density Nova Gorica → need 5



Source: Consortium (2020).

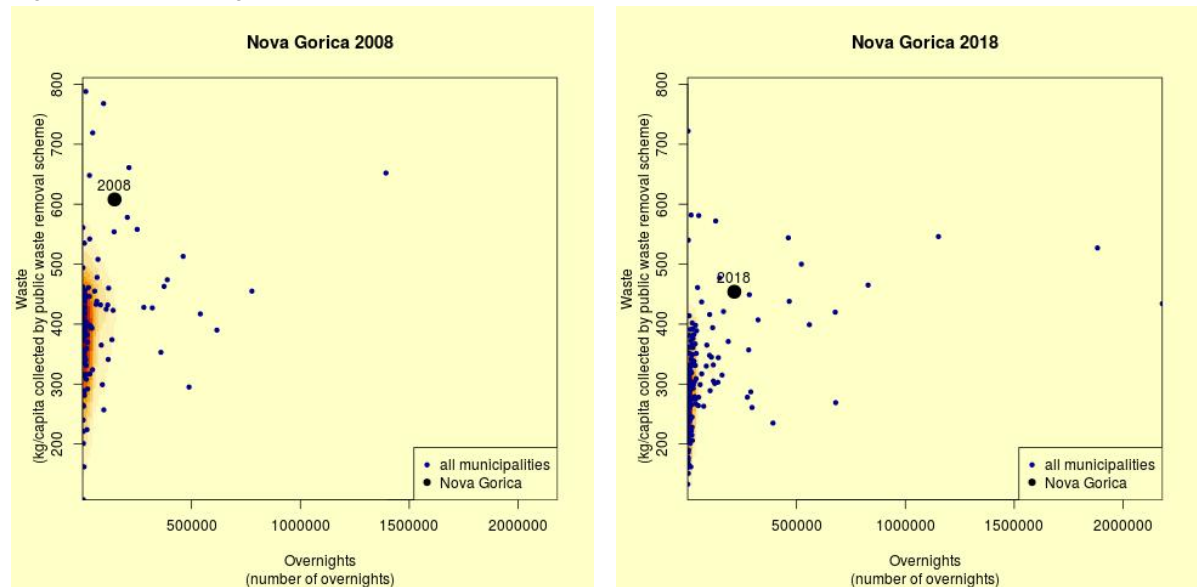
IV.4.4 Interpreting tourism impact with benchmarking

Additional insights into tourism impact can be gained by further inspecting the aforementioned density graphs, which depict the position of Nova Gorica in relation to other Slovenian municipalities over time. In the example below, the overnights indicator is plotted against waste for 2008 and 2018 (see Figure A.127). As can be observed, the position of Nova Gorica in the two plots has improved when comparing these two years. Moreover, Nova Gorica differs from other municipalities in Slovenia: its overnights and waste are higher than the Slovenian average. However, the positive note here is that the waste indicator values have decreased (i.e., improved) in spite of the increase in overnights over time.

Second example depicts arrivals/population indicator pair and compares the situation in 2008 to the one in 2019 (see Figure A.128). These two plots reaffirm again that Nova Gorica is atypical destination also when it comes to this indicator pair as it has higher arrivals and greater

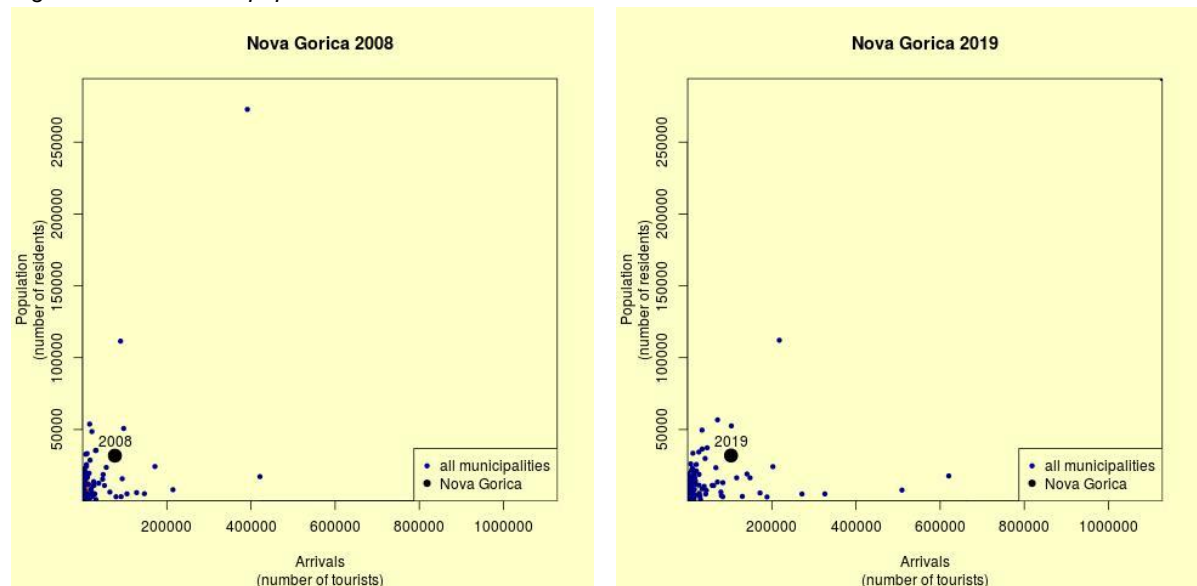
population than the majority of Slovenian destinations. What is interesting is that the position of Nova Gorica does not differ much when comparing these two years. The final example in this section (overnights/bedspace in 2008 and 2017) can be interpreted in the same way (see Figure A.129). Yet, with both bedspace and overnights values having increased since 2008, one could argue that based on this indicator pair, the carrying capacity was not in danger of being exceeded.

Figure A.127: Overnights/waste Nova Gorica → need 4



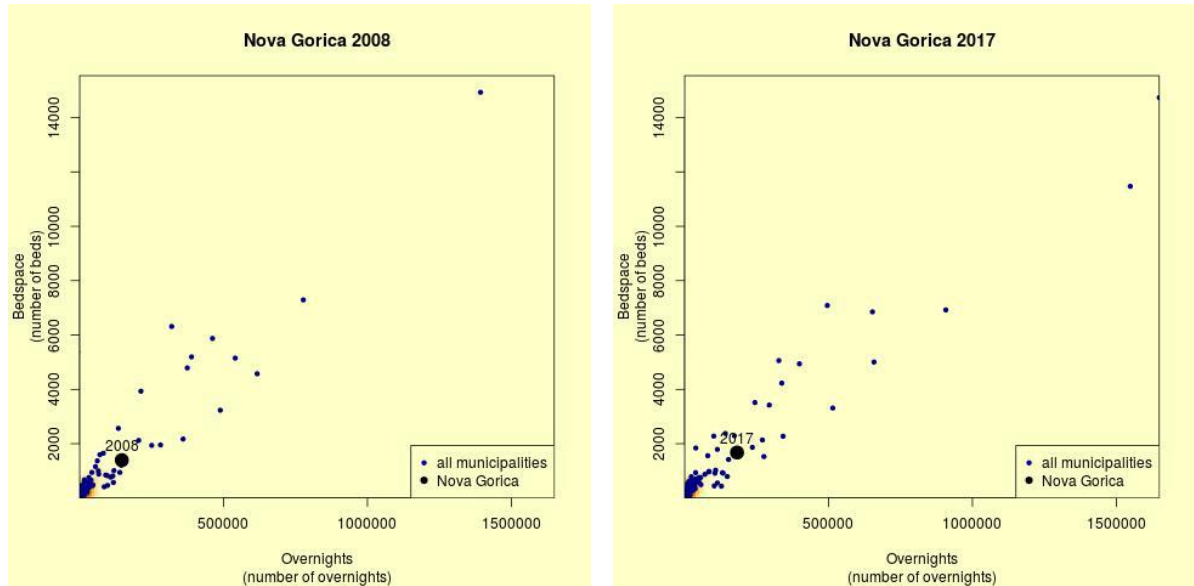
Source: Consortium (2020).

Figure A.128: Arrivals/population Nova Gorica → need 5



Source: Consortium (2020).

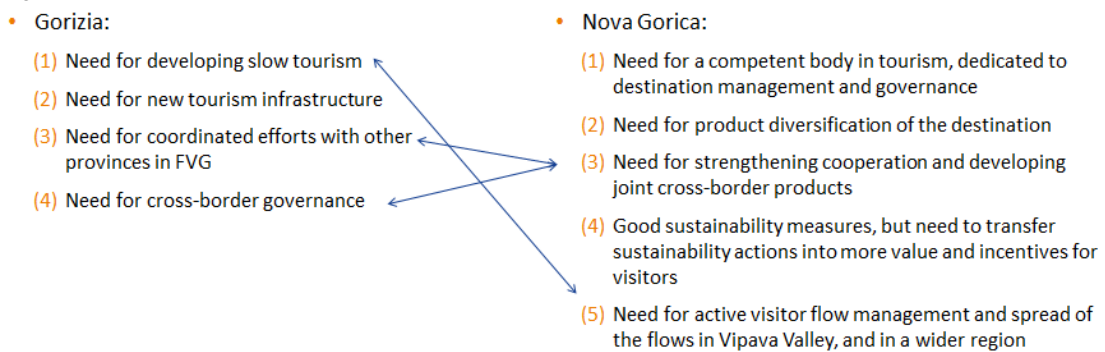
Figure A.129: Overnights/bedspace Nova Gorica → need 5



Source: Consortium (2020).

In summary of step 4, a brief reflection can be made regarding the needs of two destinations, Gorizia and Nova Gorica. In spite of different stakeholders being interviewed, one can argue that there are certain overlaps when it comes to the needs of the two destinations:

Figure A.130: Overlaps between the two different sets of needs



Source: Consortium (2020).

Slow tourism is in line with the active visitor flow management and spread of the flows. Moreover, coordinated efforts with other provinces in FVG and cross-border governance go hand in hand with strengthening cooperation. Thus, recognition of the commonalities between the two destinations can serve as a starting point of the discussion for a unified, cross-border destination.

IV.5 Step 5

IV.5.1 Carrying Capacity Workshop

Table A.51: Overview of workshop participants

Interviewee name	Institution/organisation	Position
Peter Daksobler	Marsky Business Consulting; Biking specialist and entrepreneur	Regional Chamber of Commerce – a working group SMS representative
Tea Podoponik	MONG	Project Officer
Suzana Pavlin	Hit d.d.	Sales Manager
Matjaž Zgonik	Občina Renče-Vogrsko	Senior Consultant for EU projects, investments and tourism
Erika Lojk	Javni Zavod Za Turizem Nova Gorica in Vipavska dolina	Director
Vane Urh	Razvojni Center Novo Mesto	Project Manager
Ivan Curzolo	EGTC Gorizia	Director
Erika Zuodar	MONG	Project Office
Misa Novak	Alohas	Director
Sabine Sedlacek	Modul University Vienna	Vice-President
Christian Weismayer	Modul University Vienna	Assistant Professor
Bernd Schuh	ÖIR GmbH	Managing Director
Bozana Zekan	Modul University Vienna	Assistant Professor
Ulrich Gunter	Modul University Vienna	Associate Professor
Daniel Dan	Modul University Vienna	Assistant Professor

Source: Consortium, 2020

IV.6 Outcomes of the Carrying Capacity Workshop

Discussion of the case study specific results

Was there a need to revise or update the systemic picture and the captured needs, policy and strategic orientation? If yes, why was an update necessary and what did it concern?

The two systemic pictures (Gorizia and Nova Gorica) were presented to the participants. Overall, two participants, one from Gorizia and one from Nova Gorica, were involved in the first workshops which were virtual workshops due to the outbreak of COVID-19 in early March. All other participants were not involved in steps 1 and 2. The discussion was opened with the question: What stayed the same compared 2019? There was an overall tenor that especially the tourism flows changed and it was interpreted as a drift towards more sustainable tourism. Mountain biking and mountain hiking have been observed as the strongest activities in Gorizia and Nova Gorica. In Nova Gorica there is still a strong casino tourism observable; the hotel reported an occupancy rate of 45% but besides that, strong cuts are observable in both parts of the city. There is a strong trend towards daily visitors visible.

What feedback did participants give on the combination of indicators? Did they find these combinations and their justifications appropriate? How should the carrying capacity results be interpreted based on indicator combinations and their justification?

The presentations followed the logic of comparing single indicators for Gorizia and Nova Gorica (step 3) in order to understand the differences and commonalities in the cross-border destination. However, both parts of the city define their destination independent from the other which leads to a different perception of needs (see step 2). Since the indicator pairs were selected for the identified needs, which are quite different for both destinations, the analysis followed a separated approach (step 4). This was presented to the audience and stakeholders perceived this as a very informative and interesting setting.

The presentation focused on two needs for Gorizia (needs 1 and 2) and two needs for Nova Gorica (needs 4 and 5).

Discussion about the implications of results

Forum 1: Setting the frame (poster session/mindmapping) and Forum 2: Discussion of potential actions per destination were merged at the workshop since the group had no common systemic picture.

The cross-border elements of Gorizia and Nova Gorica are not considered in the stakeholders' perception of their destination. In order to better understand how tourism development is perceived, the two planned Fora (Forum 1 and 2) were merged in order to provide more room for the cross-border elements. The focus of the discussion was based on the question: What can be done in order to develop one cross-border destination?

The discussion started with the topic **coordination** which had been identified as the missing link. There is a common cross-border strategy but tourism is not included in this strategy. Stakeholders agreed that a cross-border destination needs far more coordinated efforts than any other destination. So, there would be a need at the DMO level to define a functional area on both sides – the Italian and the Slovenian, and to define a room for collaboration. For the EGTC stakeholders discussed also the need for a common strategy where the cross-cutting field of tourism would need to be better embedded. Currently, there are tourism aspects but only at the project level, for example cross-border bike trails.

The ECC 2025 application is seen as a common project, which also offers added value for other municipalities in the surrounding region. However, stakeholders agreed that there is also a lack of collaboration which hinders a coordinated strategic development.

The workshop participants discussed the need to develop a common understanding about the territorial level, including questions such as where does one destination start and end. This would lead to a better identification of the common territory. There was consensus that this is an ongoing process which requests including more stakeholders.

A first idea was to define cycling destinations but at a bigger geographical scale, which would mean to include Italy, Slovenia, Austria and Croatia. It had been mentioned that there is a cross-border cycling board and a specific section in the Chamber of Commerce in Nova Gorica for tourism providers (more generally, not only cycling).

The second topic was **infrastructure** which was identified as a need. The discussion started from developing infrastructure and using infrastructure as incentive for visitors. Examples were discussed related to the fascinating story of the city from an historical point of view that two countries are involved and visitors could be directed to certain infrastructure elements including markets, churches, etc. and the story behind all these places. Other aspects were more oriented towards specific tourism segments like conference tourism, sports tourism in combination with culture where Gorizia and Nova Gorica could collaborate. One example brought into the discussion was bigger boxing events where Gorizia provides the sports infrastructure and Nova Gorica provides accommodation. The region has experience in the area of MICE (Meetings Incentives Conventions Exhibitions/Events) tourism but is competing with many other surrounding cities and would need to define its unique selling point.

Sustainability as a common interest of Gorizia and Nova Gorica was the third topic in the discussion. Sustainable tourism either in form of slow tourism as defined by Gorizia or the Green Scheme in Nova Gorica as a chance for creating one common cross-border destination was perceived as a core topic. Stakeholders discussed the importance of responsible tourism products which would request more coordination between producers and suppliers in the common region. A selection of specific products from the region for example craftwork, traditional products, cultural products could lead to sustainable product lines. Within this context stakeholders argued for more private sector involvement and incentives which would help to motivate the provision of sustainable services.

The final discussion point focussed more on the tourist side: **Incentives for visitors**

Incentives for visitors were defined as specific packages which would attract certain groups of tourists. This was identified as a clear lack in the destination. Stakeholders also argued that there would be a need to encourage entrepreneurship which would then lead to tailor-made packages which would sell a specific experience in the destination. Some examples for experiences are:

- Historical witness walk (World War I)
- King of France in combination with other castles etc.
- Dinner/Lunch at Square of Europe
- Dinner tour 3 countries (Austria, Italy, Slovenia)
- Cross-border smuggler stories (bike trails)

The following table is an overview of the discussion topics mentioned above, including **coordination, infrastructure, sustainability, and incentives for visitors**. The arguments in the table are inputs from the audience and the discussion led to future needs.

Table A.52: Overview of the discussion

Coordination: cross-border/regional
Coordination at DMO level One identified common need is collaboration and defining the functional area on both sides.
Coordination around the ECC 2025 (European Cultural Capital) application. In the context of the ECC 2025 application also other municipalities see added value. One identified common need is collaboration between stakeholders.
Coordination within the EGTC (European Grouping of Territorial Cooperation) One identified common need is the development of a common strategy. Tourism is integrated as a cross-cutting field in the EGTC and at the project level some tourism aspects are included (e.g. bike trails).
Coordination is needed in the context of creating a common understanding about the territorial level (e.g. where does one destination start and end). One identified common need is a process that would lead to the identification of the common territory which has to be understood as an ongoing process (including more stakeholders).
Coordination between cycling destinations (geographically bigger) One identified common need is the instalment of a cross-border cycling board.
Communication as an important tool to exchange info, develop common goals etc.
Infrastructure
Focus on the city and its historical development
Building up infrastructure for conference tourism
Building up infrastructure for sports tourism – example boxing: Nova Gorica (accommodation) + Gorizia (infrastructure) cooperation
Transport infrastructure: bike trails
Sustainability
Need for responsible tourism products
Need to build up coordination mechanisms between producers and suppliers in the common region There was common sense that this works with Austria quite well and also with Italy. The products are demanded.
Need for specific products from the region besides food. Need to concentrate more on craftwork, traditional products, cultural products (→ more can be done here)
Need for monitoring pollution
Need for private sector involvement and private sector incentives This would help to motivate private sector to offer sustainable services and make them more active and aware of sustainable tourism.
Incentives for visitors
Need for encouragement of entrepreneurship which would lead to better tailor-made packages
What about experience? – Historical witness walk (World War I) – King of France in combination with other castles etc. – Dinner/Lunch at Square of Europe – Dinner tour 3 countries (Austria, Italy, Slovenia) – Cross-border smuggler stories (bike trails)

IV.6.1 Formulation of policy recommendations

The policy recommendations are based on steps 1-5 in the methodology and have to be seen as the overarching product of the methodology.

The case study process of the cross-border case study Gorizia – Nova Gorica was divided into two processes with two different groups of stakeholders on each side of the border. The analysis showed that both parts of the cross-border city define their destination as an independent destination, one on the Italian and one on the Slovenian side. This was one of the major

conclusions after step 1 and 2 and resulted in two different sets of needs. The analysis in step 3 intended to work out the commonalities and differences of the tourist flows while step 4 focused again on the different needs. As a concluding step, all needs were contrasted and stakeholders were confronted with the potential linkages between needs 1, 3, and 4 on the Italian side and need 3 and 5 on the Slovenian side (see Figure A.130).

The stakeholder workshop was used to confront stakeholders with the two different perceptions of the potential cross-border destination and the visualizations helped stakeholders to understand how important monitoring of certain indicators is, but it also helped to understand the lack of cooperation and coordination which weakens the potential of tourism development. Therefore, the main conclusion is that stakeholder involvement especially in a “divided” cross-border setting can help to initiate more coordinated processes but it remains open if and how stakeholders will put that into practice. This leads to the following policy recommendation:

Initiating a moderated stakeholder involvement process with the aim of defining areas for tourism coordination. This process should be guided by an accepted cross-border institution, which would function as a bridging institution.

Another conclusion from the workshop discussions is that there are already cross-border projects existing which are not explicitly defined as tourism projects but focus on certain tourism-related activities, e.g. cross-border cycling paths which could potentially be used as basic infrastructure for broader tourism packages including culinary, cultural, and nature-based elements. This could easily be combined with historical elements emphasizing the specific position of Gorizia – Nova Gorica in the region. This leads to the following policy recommendation:

Developing specific tourism packages for cross-border experiences to emphasize the historically sensitive position of the region. A similar process would need to be initiated for MICE tourism in order to strengthen Gorizia – Nova Gorica’s position in this highly competitive market.

Sustainability was identified as a bridging element and offers many opportunities for cross-border activities. This leads to the following policy recommendation:

The coordinated stakeholder process should be used to develop specific areas for developing sustainable tourism in a cross-border region. A selection of specific products from the region for example craftwork, traditional products, cultural products could lead to sustainable product lines. Certain form of private sector participation would need to be developed in order to provide a solid financial basis.

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Appendix 1: Potential Divača tourism attractions and accommodation

Table A.53: Natural and cultural attractions, Divača

Area	Natural sights	Cultural sights
Divaški prag	The Škocjan caves Regional Park	Jurjeva domačija homestead
		Postcards of Divača
		Škrateljnova domačija homestead
		Museum of Slo. Film Actors
		The Airfield of Divača
		The chapel of St. Helen in Gradišče
		The ice-pit at Kačiče
		The renovated barn J'kopinov skedenj
		The rich archaeological sites
		The steam locomotive engine in Divača
Senožeče Valeys	Diverse landscape around Senožeče	Villages in the Škocjan caves regional park
		The Adria brewery
		The castle hill in Senožeče
		The church of St. Anthony of Padua in Gabrče
		The defensive tower in Dolenja vas
		The restored stone trough (Fontana)
Brkini	The side valley of Padež	The tollhouse in Senožeče
		The church of St. George
		Brkini slivovec – the local fruit brandy
		The Švarcenek castle
Vremščica	Wonderful slopes of Vremščica	The village Barka
		The airfield of Divača
The hidden face of Karst	The Divača Cave	Vremščica Centre for Co-natural Recultivation
	The Škocjan Caves	The airfield of Divača
Allong Velika Voda	The gorge of the Reka River	
		The brothers Bogomir and France Magajna – writers
		The castle of Školj
		The church of St. Thomas
		The church of the Assumption
		The Dekleva House in Vremški Britof

Source: Municipality Divača, n.d.

Table A.54: Accommodation facilities and events, Divača

Area	Where to eat	Where to slip	Events
Divaški prag	Domačija Vrbin, Kačiče-Pared	Apartments Zenja	Kačišnica in Kačiče
	Godina restaurant, Kačiče	Domačija Jankovi	New Year concert in Divača
	Malovec restaurant and lodging	Domačija Vrbin, Kačiče-Pared	Škocjan festival
	Pri Bzku pizzeria	Hotel Malovec	Traditional holiday in Divača
	Pri Čotniku restaurant	Malovec restaurant and butchers	
	Restaurant Na'Planinci	Restaurant Na'Planinci	
	Risnik restaurant and lodging	Risnik restaurant and Malovec Valter lodging	
	Turistična kmetija Pr'Betanci	Turistična kmetija Pr' Betanci Žnidarčič Apartments	
Senožeče Valeys	Na ravni restaurant	Apartmaji Turist-Domačija Lojtrnik	Herders games in Senožeče
	Pri mlinu restaurant	Stari Grad restaurant and lodging	Local festival in Senožeče
	Stari Grad restaurant and lodging		
Brkini	Dujčeva domačija	Dujčeva domačija	Village festival – Saint's Day celebration at Barka
	Tourist farmhouse and accommodation Ambrožič		
	Turistična izletniška domačija Benčič		
Allong Velika Voda			Cultural and sports festival in Vremski Britof
			Village festival (Saint's Day) in Vremski Britof

Source: Municipality Divača, n.d.

Appendix 2: Indicator ideas

Context indicator ideas

The question about which data can be processed highly depends on the willingness of the respective institutions on sight to cooperate with the project partners (classified as “upon availability” in column three), as well as their price (classified as “free” vs. “commercial” in column three). In the optimal case they are available on a daily basis for several years (if not static, e.g. actual infrastructure related data). A minimum of 10 years should allow for the inclusion of yearly variations. Longer time periods increase the accuracy of e.g. prediction models. Primary data, secondary commercial data, and free secondary data will be used to develop a common model framework tackling carrying capacity.

- **Primary** and **secondary commercial data** will be used to present tailor-made results addressing specifically the stakeholders’ requests on sight. They are solely collected/bought to deliver case study relevant information for the destinations being part of the project.
- **Primary data:** Decisions on which data will be collected on sight will be made at a later stage as soon as the “indicator matrix” is completed and the necessary items are identified.
- **Secondary commercial data:** The project budget reserved for data acquisition will be allocated to the different sources upon their usability for the tasks at hand. Decisions will be made after testing the usefulness of the identified data sources of the “indicator matrix” on comparable samples.
- **Free secondary data sources:** In general, the focus lies on open data sources as well as data sources that can be delivered by public institutions for free, as this guarantees for the widest possible application of the developed approach.

Table A.55: Possible context indicators to be researched

Data	Data source	Availability
Overnights	Public authorities	Upon availability
Arrivals	Public authorities	Upon availability
Tourist tax income	Public authorities	Upon availability
Past and future weather records	Public/private authorities: e.g. National weather station – https://meteo.arso.gov.si/met/en/	Commercial (past time series)/free (weather forecasts)
Automatic highway traffic counters	Tourism 4.0	Upon availability
WIFI access	Tourism 4.0	Upon availability
Mobile data access	Tourism 4.0	Upon availability
Bus tickets sold	Public/private authorities	Upon availability
Railway tickets sold	Public/private authorities	Upon availability
Entry tickets sold (e.g. Skocjanske jame caves in Divača)	Public/private authorities	Upon availability
Google trends for case study destination related terms (terms to be selected in the course of the project)	https://trends.google.de/trends/?geo=EN	Free
Holidays (national holidays calendar, weekend for monitoring day tourists)	https://www.officeholidays.com/countries/slovenia/	Free
Click stream data from local tourist websites or other attractions (Destination Management Organizations, tour operators, etc.)	Public/private authorities: Bled – Slovenia – https://www.bled.si/en/ , Nova Gorica – Slovenia – http://www.vipavskadolina.si/de/splosno/novagorica , Gorizia – Italy – https://www.lifeinitaly.com/tourism/friuli/gorizia , Brežice – Slovenia – https://www.brezice.si/ , Divača – Sloveni – https://www.divaca.si/	Upon availability
Instagram posts	https://www.instagram.com/	Commercial
Restaurant, accommodation and attraction reviews	Tripadvisor – https://www.tripadvisor.com/ , Airbnb – https://www.airbnb.com/ , Yelp – https://www.yelp.com/ , Booking – https://www.booking.com/ , further user-generated content (UGC) from social media platforms	Free
Air quality data	Public/private authorities: e.g. https://aqicn.org/ , https://www.arso.gov.si/en/air/data/	Upon availability
Infrastructure data: restaurants, pubs, cafes..., hotel, models, and other places to stay the night..., supermarkets, bakeries..., tourist information, sights, museums, places of worship such as churches, mosques..., natural features, lakes, forests..., traffic related information, parking lots, petrol (gas) stations, roads, tracks, paths, railway, subways, light rail, trams, rivers, canals, streams..., building outlines, residential areas, industrial areas...	OpenStreetMap (OSM) https://www.openstreetmap.org/	Free
Price levels of ticket entries for different attractions on sight	Public/private authorities	Upon availability
Primary data sources	Interviews, questionnaires, etc.	Commercial

Source: Consortium, 2020.

Tourism indicator ideas

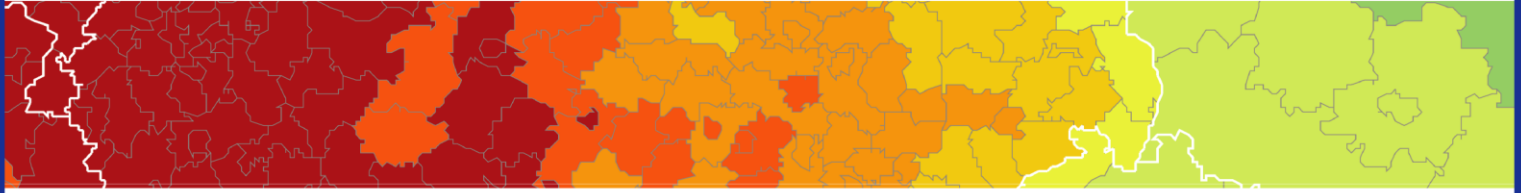
Table A.56: Possible tourism indicators to be researched

Study	Strengths	Weaknesses	Potential degree of applicability	Suggested indicators ¹⁴
Jurado et al. (2012)	Carrying capacity assessment : 24 indicators (9 physical, 9 socioeconomic, 6 social)	– Focus on the coastal area – Data availability/collection effort	Medium	1. bednights (absolute value and percentage change) 2. arrivals (absolute value and percentage change)
UNWTO (2014)	Density (explicitly labeled as carrying capacity in this report), CO ₂ emissions, water consumption, solid waste generation, visitor load (number of tourists per day per 100 residents), resident satisfaction, congestion and intrusion, use of essential services	– Focus on cities – Data availability/collection effort	Medium	3. average length of stay 4. tourism revenues 5. share of tourism contribution to GDP 6. occupancy rate 7. number of bedspaces available in commercial accommodation establishments (absolute value and percentage change)
Gössling et al. (2015)	Travel distance and estimation of CO ₂ emissions	Focus on countries, no focus on modal split, source-market weighting, number of destinations visited	Low	8. share of Airbnb bedspaces 9. distribution of bedspaces 10. distribution of demand (seasonality) 11. tourism density 12. tourism intensity
European Union (2016); European Commission (n.d.)	– 43 core indicators – Supplementary indicators for specific types of destinations – Slovenia as one of the case studies	Data availability/collection effort	High	13. percentage of same day visitors to total number of visitors 14. CO ₂ emissions (during traveling to/from and at the destination)
González-Guerrero, Robles, Pérez, Ibarra, and Martínez (2016)	– Overview of the carrying capacity studies – Evaluation of visitor management models	NA	Low	15. waste production per tourist night compared to general population waste production per person (kg) 16. water consumption per tourist night compared to general population water consumption per resident night
Green Destinations (2017)	– 6 main themes – 100 criteria	Data availability/collection effort	Medium	
McKinsey & Company and World Travel & Tourism Council (2017)	– 9 metrics for a diagnostic development – 5 tactics with specific sets of actions	Focus on cities	High	17. energy consumption per tourist night compared to general population energy consumption per resident night
Önder, Wöber and Zekan (2017)	An overview of potential objectives and indicators for destinations and their policy-makers (classified as economic, social, and/or environmental)	Focus on cities	High	18. closeness to airports, cruise ports and World Heritage Sites 19. negative TripAdvisor reviews 20. overall satisfaction of visitors and residents with tourism
University of St. Gallen (2017)	– 6 steps for understanding visitor flows	NA	High	

¹⁴ Based on the literature review on carrying capacity of tourism destinations.

Study	Strengths	Weaknesses	Potential degree of applicability	Suggested indicators ¹⁴
Lenzen et al. (2018)	<ul style="list-style-type: none"> – Bilateral embodied CO₂ emissions – Breakdown of the tourism carbon footprint into purchased commodities and emitting industries 	<ul style="list-style-type: none"> – Focus on countries – Analytical complexity 	Low	
Peeters et al. (2018)	<ul style="list-style-type: none"> – 6 indicators of over-tourism – Applicable to various types of destinations – Bled as one of the case studies 	NA	High	
Roland Berger (2018)	<ul style="list-style-type: none"> – Quality versus quantity – 4 proactive measures (short term, mid term, long term) – 3 reactive measures 	Focus on cities	Medium	
UNWTO (2018, 2019)	<ul style="list-style-type: none"> – 11 strategies – 68 measures 	<ul style="list-style-type: none"> – Focus on cities – Data availability/collection effort 	Medium	
Gunter and Wöber (2019)	Travel distance, modal split, source-market weighting, number of destinations visited, and estimation of CO ₂ emissions	Focus on cities	High	
Önder and Ze-kan (2019)	Recommendations	Focus on cities	Medium	
WEF (2019)	Variables from the pillars on environmental sustainability and natural resources	<ul style="list-style-type: none"> – Focus on countries – Data availability/collection effort 	Medium	

Source: Consortium, 2020.



ESPON 2020 – More information

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