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SOME CHANGES IN THE SPATIAL CHARACTERISTICS OF TOURISM IN SLOVENIA SINCE ITS INDEPENDENCE

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Abstract

The paper discusses the processes and changes in Slovenian tourism in the last three decades, after the disintegration of Yugoslavia. They have been related to the influence of factors both within the field of tourism and outside of it (external factors, such as geopolitical events, economic changes and shocks, etc.). Empirical analysis is focused particularly on the spatial characteristics of tourism, with the emphasis on the geographical origin of tourist flows and, on the other hand, stability/variability of geographical distribution of tourism within Slovenia. In regard to the latter, especially a very intense growth of tourist numbers in Slovenian capital (Ljubljana) is worth mentioning. The most evident change regarding inbound tourist flows is a strongly increased number of non-European tourists. The observed changes point out the fact that Slovenian tourism is increasingly embedded into globalization processes. Despite the growth in non-European tourist arrivals, the relatively short-distance tourist flows still prevail in the majority of Slovenian tourist destinations. They are also less sensitive to economic and political shocks and they will most probably remain crucial for Slovenian tourism.

Key words

tourism, tourism development, Slovenia, tourist flows.

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1. Introduction

In the territory of the present-day Slovenia several tourism resorts developed already in the 19th century, but their number remained very limited. Throughout the history tourism development was closely related to the events in the countries/states whose part was the Slovenian ethnic territory (Austrian Empire, Austria-Hungary, Yugoslavia). Since 1991, Slovenia is an independent state with its own tourism policy. Due to its modest size and a lack of

tradition as an independent state the tourism identity of Slovenia is still relatively weak. Guidebooks situate Slovenia within the Eastern and Central European sub-regional frameworks. Despite its inclusion in Eastern European travel guides, Slovenia is consistently defined as Central European (Nelson, 2012).

Within the European context, Slovenia is moderately developed tourist destination. According to ESPON study (ESPON ..., 2006) Slovenia was "medium-high penetrated" destination. In 2016 it ranked 23rd among 28 EU member states (EUROSTAT, 2019) in

regard to the number of tourist nights. The picture is considerably different if taking into account number of tourist nights per country area; according to this indicator Slovenia ranked 17th (545.4 tourist nights/km²). If number of tourist nights is compared with the population number, than Slovenia ranked even higher – 15th (5.4 nights spent per inhabitant).

In the last decade, Slovenia experienced a marked tourism growth. In the period 2010–2017 number of tourist nights increased by 47.9% (EUROSTAT, 2019). In the same period, increase in EU (28 member states) was just 32.85%. Tourism is becoming an important (or even crucial) industry in many Slovenian regions. Even at the national level it is an important economic activity: its total contribution to GDP in 2017 was, according to World Economic Forum (Travel & Tourism..., 2017), 11.9% and to total employment 12.3%, i.e. 101,500 working places. Visitor exports generated EUR 2,488.7 million, what was 7.7% of total exports in 2017 (Travel & Tourism..., 2017). Tourism decisively transformed the appearance of many Slovenian regions and changed their economic and social structure.

Tourism development is influenced by many factors (accessibility, changes in economic conditions, environmental situation, government policies, political environment, fashion, etc.). Its study can be approached from various perspectives (e.g. McKercher, 1999; Butler, 2004) and at various spatial levels. Although tourism development at the national level is often the focus of research (e.g. Formica, Uysal, 1996; Petrevska, Collins-Kreiner, 2017), this necessarily means a high level of generalization. This could be questionable since there are often very divergent development paths in various tourism places/resorts within a single country. This is the case also in Slovenia (Cigale, 2012).

Tourism as an economic and social phenomenon is much diversified. It has an inherently spatial nature. As a consequence, it is of traditional interest for geography. In the 1970s, D.G. Pearce (1979) identified six major areas of geographical interest in tourism: spatial aspects of supply, spatial aspects of demand, the geography of resorts, patterns of movements and flows, the impact of tourism, and models of tourist space. Tourism necessarily involves movements in space, including the ones between the place of residence and tourism destination or between several destinations. Distance is one of the most important determinants, affecting tourist flows. Nevertheless, its influence is mediated by numerous other factors. On the other hand, tourism is an integral part of the globalization process and tourist flows are increasingly internationalized and globalized.

This paper discusses the processes and changes in Slovenian tourism in the last three decades, after the disintegration of Yugoslavia. They have been related to the influence of factors both within the field of tourism and outside of it (external factors, such as geopolitical events, economic changes and shocks, etc.). The aim of the paper is not to offer a holistic picture of tourism in Slovenia since its independence. Instead it pays attention to several relevant, and inter-related, aspects of tourism development. It takes into account the influence of various factors, related to social and environmental changes. These factors are relevant at various spatial scales – from local to global.

Empirical analysis is focused particularly on the spatial characteristics of tourism demand (with the emphasis on the geographical origin of tourist flows and, on the other hand, stability/variability of geographical distribution of tourism within Slovenia), which are a reflection of broader social and economic processes.

Generally, distance is a factor which, to a large extent, influences the volume of tourism demand. Tourist travel requires an input of time, money and effort. This input increases with a distance; consequently, demand diminishes (McKercher, Lew, 2003). 80% of international travel is directed to destinations located within a 1000 km radius from the country of origin (McKercher et al., 2008). Although distance is an objective, measurable spatial characteristic, its role and perception change. Furthermore, distance is only one of many factors influencing tourist movements. In this paper, attention is paid to the changes of inbound tourist flows through time in relation to the distance travelled (tourists' countries of origin) and to the question, how has the role of distance changed through time and which are the factors that have influenced these changes.

For the analysis of tourist flows, available data, collected by the Statistical Office of the Republic of Slovenia (SURS), have been used. In order to make out more general patterns, data on tourist nights spent in regard to tourists' country of origin (see chapter 4.1.) have been aggregated into five groups: Slovenia, neighbouring countries (Italy, Austria, Hungary, Croatia), nearby European countries (i.e. countries which are wholly or to a considerable extent within a 500 km radius, excluding neighbouring countries), the other European countries (including only partly European countries, i.e. Russia and Turkey) and non-European countries. Additionally, tourism policy documents were used and available tourism literature has been synthesised.

2. Slovenian tourism within Yugoslavia

Before the breakup of Yugoslavia, Slovenia was moderately popular tourist destination. However, numbers of tourist visits were much smaller than the ones on the (Croatian) Adriatic coast. Slovenia used to be a transit area for tourist flows toward the Adriatic coast (Mihalič, 1999). Despite this, it received many foreign and national overnight visitors. The largest number of tourist arrivals and tourist nights was registered in 1986 (2,821,396 and 9,213,434). Afterwards, a decline of the numbers of "domestic" tourists (i.e. tourists from Slovenia as well as other Yugoslav republics) and tourist nights followed while the number of foreign tourist nights was still increasing and was the highest in 1989. This was the last year with "normal" tourist flows, since the effects of political instability in the country had not yet been obvious. In this year, the number of foreign tourist arrivals was higher than any time during the post-World War II period. Slovenia received 13.0% of all tourist arrivals in the country but only 8.5% of tourist nights.

The largest numbers of tourists came from nearby areas (fig. 1). In 1990, 32.8% of tourist nights were spent by Slovenian tourists, 9.7% by German and 9.0% by Italian tourists. Among the tourists from other Yugoslav republics, the most numerous were tourists from the neighbouring Croatia (8.6% of tourist nights).

Tourism industry was an important part of Slovenian economy. Slovenian tourism industry played a major middleman role in distributing foreign visitors to the Adriatic (mostly Croatian) seaside resorts. The former Yugoslavia's largest travel agencies,

Kompas and Globtour, with their headquarters in Slovenia, had in the 1980s a share of close to 50% of package tours and organized leisure stays in the Northern Adriatic (Gosar, 1999, 2001, 2004). Slovenian companies also invested into tourist accommodation and infrastructure in several republics of the former federation (Gosar, 1999). The breakup of Yugoslavia interrupted these connections.

3. Slovenian tourism after independence

In 1991, with the disintegration of the former common federal Yugoslav state, Slovenian tourism experienced an unprecedented shock and decline in tourist visits. In June, after Slovenia declared independence, armed conflict in Slovenia broke out but it was soon finished and the country was spared much of the bloodshed and violence. Nevertheless, in 1991 only 4,885,842 tourist nights were registered (61.4% of the 1990 number, i.e. 38.6% drop).

Although Slovenia became an independent state, tourism demand remained under strong influence of the events in the territory of former Yugoslavia throughout the 1990s. Ethnic violence and war in the neighbourhood stopped most of international arrivals. Wars in Croatia (1991–1995) and in Bosnia and Herzegovina (1992–1995) resulted in very small numbers of foreign tourists visiting Slovenia.

Till 1997 number of tourist nights increased to 6,384,062 (fig. 2), what is, in comparison with 1991, only 30.7% growth. Despite considerable spatial distance even the influence of the events in Kosovo (1998–1999) was strongly felt in Slovenian tourism: in

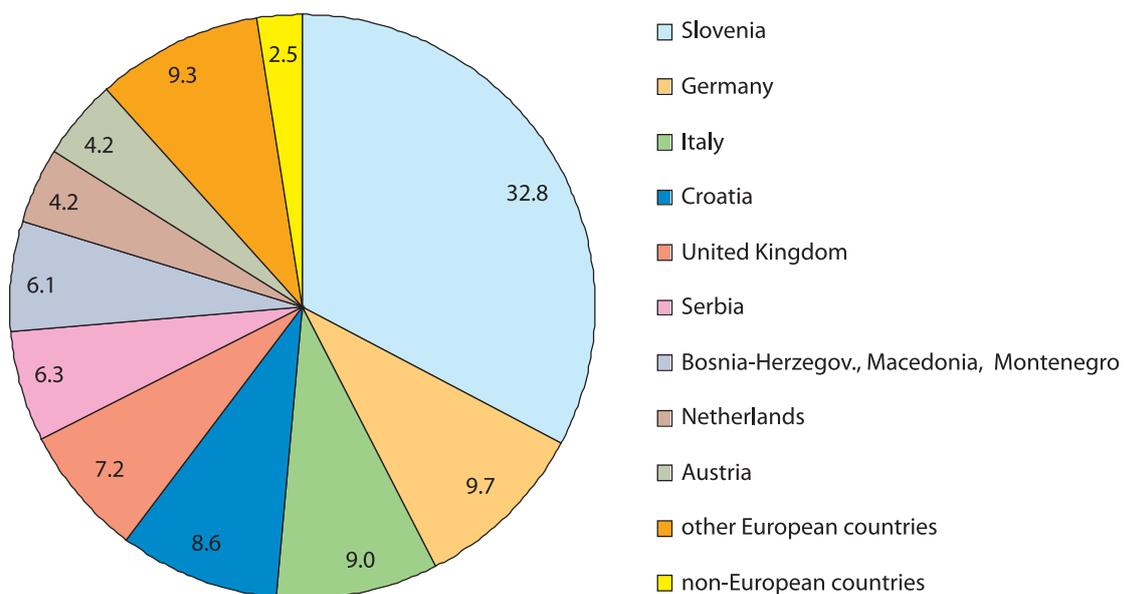


Fig. 1. Share (%) of tourist nights in 1990 by tourists' country/place of origin

Source: Letni pregled turizma 1990, 1992.

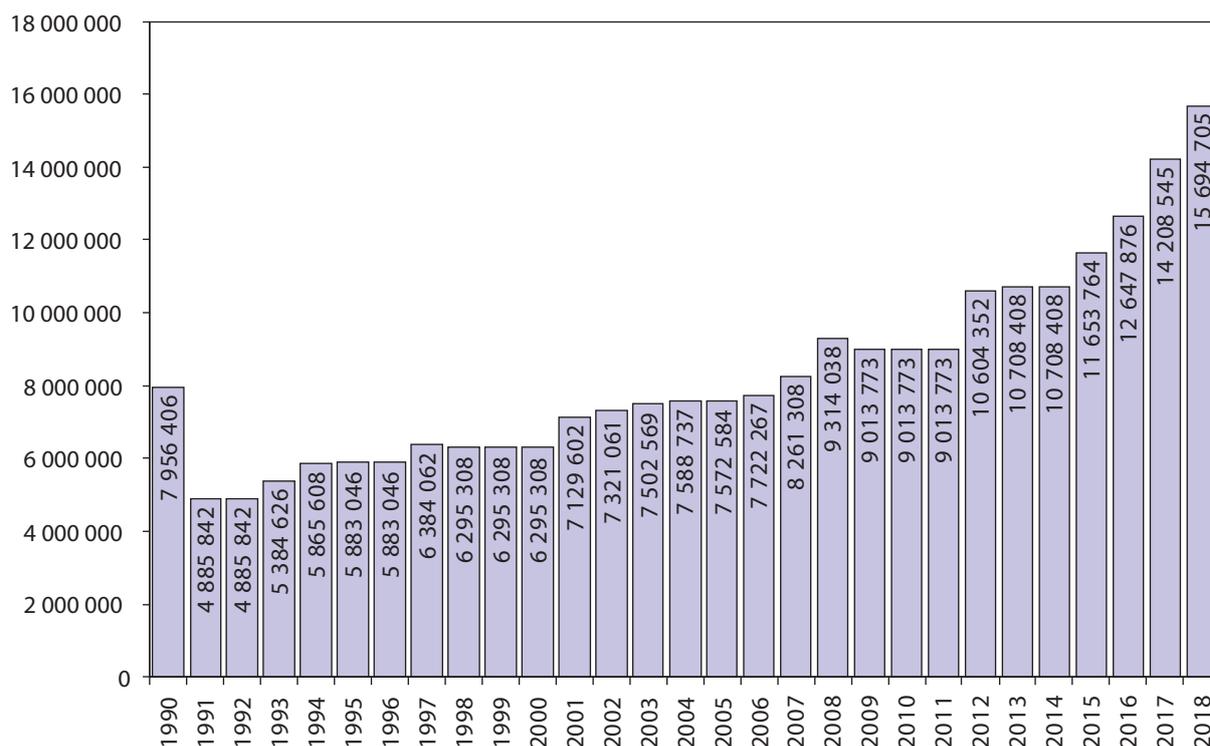


Fig. 2. Tourist nights in Slovenia in the period 1990–2018

Source: Statistical Office of the Republic of Slovenia, 2019; Letni pregledi turizma, 1990–2002.

1998, number of tourist nights dropped to 6,295,308 and in 1999 to only 6,056,563.

Changes in the volume of tourism demand were, above all, related to the decline in foreign tourist visits, while domestic tourism remained stable or even slightly increased. Many Slovenian tourists who were used to spending their holidays in the Croatian coastal areas stayed in their home country as a result of war in Croatia. In 1996, after the end of the war, they returned to Croatia (Mihalič, 1999) and domestic tourism dropped 5 per cent, compared to 1995.

Foreign tourism demand grew only gradually and hesitatingly. In 1992, share of foreign overnights was just 39.5% and in 1995 it increased to 41.1%. Publicity in the mass media was negative, while even more enduring were the consequences of the fact that Slovenia as a tourist destination was put on the black list of tour operators (Mihalič, 1999).

Many tourism businesses were negatively affected by the disintegration of the former common state, in particular, travel agencies (Globtour), tour bus enterprises (Kompas Hertz, Slavnik), airlines (Adria Airways) and excursion resorts (Postojna, Lipica) (Gosar, 1999; 2001). Political events triggered various changes in the Slovenian tourism industry, e.g. a reduction of available beds and the increase of quality of tourist amenities (Gosar, 2004). Besides, there were changes in the travel agencies sector. Previously, within Yugoslavia, a limited number of travel agencies have had a sole control of the

market. Afterwards, several dozen smaller enterprises controlled similar shares of the market (Gosar, 1999). Instead of serving as a middleman for the foreign (predominantly German) market, the Slovenian travel agencies increasingly served domestic demand (Gosar, 1999).

In the new millennium, tourism in Slovenia has been marked by several events. In 2004, Slovenia joined European Union, in 2007 adopted the euro as the national currency and in 2009 it joined the Schengen Area. The direct impacts of these events were not very evident while the indirect ones were doubtlessly much more important. E.g. joining EU meant also the influx of EU funds (Butowski, 2010), which were used also for many tourism related projects. The introduction of the euro eliminated exchange-rate transaction costs, facilitated price comparisons in the Euro zone, and caused higher prices (Nemec Rudež, Bojnec, 2008). Joining the Schengen Area eliminated border formalities and consequently entirely simplified cross-border tourist flows. In 2008, Slovenia was hard hit by the global economic and financial crisis. The consequences were felt also by tourism industry and resulted especially in decline of foreign tourist visitation in 2009 and 2010.

Tourism has been affected also by environmental processes. In the last couple of decades, the most salient of them is global warming which is of relevance especially for winter tourism resorts

(Vrtačnik Garbas, 2008, 2009). Snow conditions have changed significantly, especially at lower elevations (Ogrin et al., 2011). The main adaptation strategy of Slovenian ski resorts has been introduction of snow-making facilities (Vrtačnik Garbas, 2008).

In the decades since the independence, Slovenian tourism policy experienced fundamental changes. In the 1990s, Slovenian tourism industry struggled to survive and this was reflected also in tourism policy with its emphasis on competitiveness and "quality tourism products" (Strategija razvoja turizma..., 1994). In 2002, in the strategy of that time, it was for the first time stated, that the new development paradigm of Slovenian tourism follows »the concept of **sustainable socio-economic development**« (Kovač et al., 2002). Tourism strategy for the period 2012–2016 was even titled Partnership for the **sustainable development** of Slovenian tourism (Strategija razvoja slovenskega..., 2012). Similarly, the recent strategy is named Strategy for the **sustainable growth** of Slovenian tourism for 2017–2021 and gives "the utmost emphasis on development of innovative, **sustainable** [all emphases by the author] and integral tourism products, services and solutions" (Mihalič et al., 2017, p. 33). Therefore, in the 21st century, Slovenian tourism policy is, at least formally, focused on sustainable tourism. The leading discourse is the discourse of sustainable development.

In 2018, 5,933,266 tourist arrivals and 15,694,705 tourist nights were registered. In comparison to 2010, when the effects of economic crisis could still be felt, this was 76.2% increase. The majority of foreign tourist nights were spent by Germans (8.7% of all tourist nights) and Italians (8.5%), while Slovenian citizens spent 31.9% of tourist nights.

4. Some spatial characteristics of Slovenian tourism and their changes

Slovenia as a tourism space performs various roles. For the majority of tourists, Slovenia is only a transit space while their destinations are located on the Adriatic coast. Even for tourists, who spend at least one night in the country, Slovenia is only partly an independent destination. In the summer season 2012 the share of foreign tourists for whom Slovenia was the only destination, was just 57.5%, while 42.5% of foreign tourists had at least one travel destination in some other country (Statistical Office..., 2019). This can be attributed, among other things, to Slovenia's modest territorial size and to the fact that many tourists prefer to link within a single journey

visits to several countries. Such behaviour is especially characteristic for tourists from more distant (non-European) countries who choose Europe or a part of Europe (and not exclusively Slovenia) as their travel destination. These data show that a considerable share of all tourist travel to Slovenia is multi-destination travel (Slovenia and at least one other country). Even numerous journeys with Slovenia as the only visited country are in fact multi-destination journeys. Because of Slovenia's modest territorial size, the number of such journeys is comparatively limited. According to the SURS surveys among foreign tourists (Anketa o tujih turistih..., 2004), in 1994 45.2% of foreign tourists stayed in Slovenia for only 1–3 nights, while in the place, where a tourist was interviewed, this share was 62.7%. The difference between both numbers is the result of tourists spending their time in Slovenia in more than one place. In the first decade of the 21st century (in 2003), situation was a similar one: 41.7% of foreign tourists spent in Slovenia just 1–3 nights while in the place of the interview this share was 54.0%.

4.1. Tourists' countries of origin

Data on tourism demand have been already briefly presented in chapter 3. In Slovenia tourists from nearby regions (neighbouring and other nearby countries, together with Slovenia) traditionally prevailed. In the ten year period 2008–2017 the total share of nights spent by tourists from Slovenia and from four neighbouring countries varied between 68.3% and 54.5%.

Beside the changes in the size of tourist flows, one of the most obvious changes in tourism demand in the decade after Slovenia's independence was the spatial shift of the origins of the inbound tourist flows. Spatial proximity not only remained an important factor of influence but has even gained in importance. Thus, the biggest drop of tourist numbers was characteristic of non-European tourists and tourists from the more distant European countries (»the other European countries«; tab. 1). This was to a large extent related to the quantity of the available information on Slovenia and its interpretation. Tourists from nearby countries were more familiar with the situation in Slovenia; as a result, they returned to Slovenia sooner and in greater numbers. Another important factor was the behaviour of the various actors (e.g. tour operators, tourists, etc.).

In the more distant markets the image of Slovenia remained negative throughout the 1990s; the demand was at least till 1995 influenced by the wars in nearby Croatia and Bosnia and Herzegovina and later by events in Kosovo (1998–1999). The reaction of tourists from more distant countries was

stronger because many of them used to visit Slovenia by charter flights organised by tour operators. Not all destinations were equally affected. Spas were not particularly linked to large tour operators (Mihalič, 1999). Therefore, decline of foreign tourism was less obvious. In some (eg. mountain) destinations, the war caused shift from “package tourism” organised by tour operators to non-organised, individual tourism. Tourists from nearby countries, e.g. Germany and Italy, came to Slovenia individually, by cars. They started to come back after the war sooner than the others (Mihalič, 1999).

The situation at the beginning of the 21st century gradually returned to normality. Tourists from the previously key inbound markets to a large extent returned to Slovenia. The exception was the area of the former Yugoslavia.

The dissolution of Yugoslavia caused a drastic decline in the numbers of tourists from the other areas of the former common state. In 1990, these tourists spent 21.0% of all tourist nights in Slovenia. In the middle of the 1990s (in 1995) their share was just 6.3%. The decline was in a long-term perspective even greater than with other foreign tourists.

Tourists from the territory of former Yugoslavia failed to appear not only during the time of military conflict, which effectively precluded their visits, but also later on (in 2000, the share of tourist nights spent by them was just 6.0%). Partly, this can be attributed to the economic problems, related to the chaotic socio-economic and geopolitical situation in the area, and consequently low purchasing power of the majority of the population, and partly, this can be seen as a consequence of the increased perceived distance related to the fact that Slovenia was no longer a part of the same country. The entrance into Slovenia required increased effort (currency exchange, visa requirements, border formalities). Additionally, relations among countries were often rather tense.

In 2010, the abolition of visa requirements for tourists from Montenegro, Macedonia (now North Macedonia) and Serbia resulted in a more obvious increase in the number of tourists from these countries. The number of nights spent by tourists from Macedonia, Montenegro, and Serbia increased from 167,167 in 2009 to 251,534 (50.5 % increase) in 2010. Similar, although more moderate, increase was a consequence of the visa abolition for the

Tab. 1. Shares of tourist nights (in %) by regions in the period 1990–2018

	1990	1991	1992	1995	2000	2005	2010	2015	2018
Slovenia	32.8	55.4	60.5	58.6	49.3	41.9	44.0	35.8	28.8
Neighbouring countries	22.2	23.1	21.5	18.7	22.5	25.1	22.3	22.3	21.4
Nearby European countries	22.4	12.5	11.9	13.4	15.0	13.0	12.3	14.1	17.2
Other European countries	20.1	7.8	5.1	8.0	10.6	16.1	16.5	18.9	22.7
Non-European countries	2.5	1.2	1.0	1.4	2.4	3.9	4.8	8.9	9.9
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Note: *Nearby European countries* include Bosnia and Herzegovina, Czechia, Germany, Montenegro, Serbia, Slovakia, and Switzerland. *Other European countries* include also partly European countries (Turkey and Russia). 1990 data include other Yugoslav republics in other groups of countries (*neighbouring countries*, *nearby European countries*, *other European countries*), although they were part of the same country as Slovenia.

Source: Statistical Office of the Republic of Slovenia, 2019; Letni pregledi turizma, 1990–2002.

Tab. 2. Nights spent by tourists from the countries with the fastest growth of tourist visitation to Slovenia in the period 2008–2017

Country	Tourist nights 2008	Tourist nights 2017	% increase
Republic of Korea (South Korea)	8,373	163,289	1850.2
China	10,159	89,080	776.9
Other Asian countries	27,313	203,894	646.5
Malta	5,761	27,121	370.8
Brazil	6,315	24,165	282.7
Other countries of South and Middle America	10,827	34,068	214.7
South Africa	2,428	7,527	210.0
Turkey	20,352	51,901	155.0

Source: Statistical Office of the Republic of Slovenia, 2019.

citizens of Bosnia and Herzegovina. Thus, number of their nights spent increased from 66,611 in 2010 to 70,478 in 2011 (5.8 % increase). Irrespective of this, the share of nights spent by tourists from all of the countries in the area of former Yugoslavia (excluding Slovenia) remains below 7% (6.7% in 2017).

On the other hand, increasingly obvious are the changes in the number of arrivals of tourists from the most distant countries. Previous focus of Slovenian tourism on the European tourists has gradually started to diminish. They have been partly replaced by tourists from other continents.

When Slovenia was still a part of Yugoslavia, the share of non-European tourists was almost negligible. In 1990, the total share of tourist nights of all non-European tourists was 2.5%. In 1992, this share dropped to just 1.0%. Likewise, in the middle of the 1990s, this share – because of various reasons (perception of Slovenia as a potentially dangerous, politically unstable country, vicinity of war areas, etc.) – remained very low: in 1995 total share of overnights of all non-European tourists was 1.4% (the share of Asian overnights just 0.15%).

In the last decade, the growth of non-European tourist visits has been gradual, but very evident. In 2010, only 4.8% nights were spent by non-European tourists, while in 2018 this share increased to 9.9%. The increase is not just a consequence of an outstanding growth in only one important

non-European market or in a small group of them but is linked to the growth in large number of non-European countries (tab. 2). Thus, in the ten year period 2008–2017 number of nights spent by tourists from South Africa increased by 210% (from 2,428 to 7,527), tourists from Brazil by 283% (from 6,315 to 24,165), tourists from China by 777% (from 10,159 to 89,080) while the nights spent by tourists from South Korea increased by even 1850% (from 8,373 to 163,289).

Trends, related to the increase in numbers of tourists from the most distant countries, are reflected also in the data on means of transportation used by foreign tourists. Traditionally, the vast majority of tourists came by car. In 1994, among the tourists in the summer season, the share of tourists coming by plane was just 8.5% (Anketa o tujih..., 2004). Growth of the non-European tourist arrivals (and arrivals of tourists from a more distant European countries) resulted in the increase of tourists coming by plane to 24.4% in 2015 (Statistical Office..., 2019).

4.2. Spatial distribution of tourist flows within Slovenia

Another aspect of the spatial changes in the Slovenian tourism is related to the spatial distribution of tourist flows within the territory of Slovenia. In the second half of the 20th century – apart from some relatively isolated tourist resorts dispersed

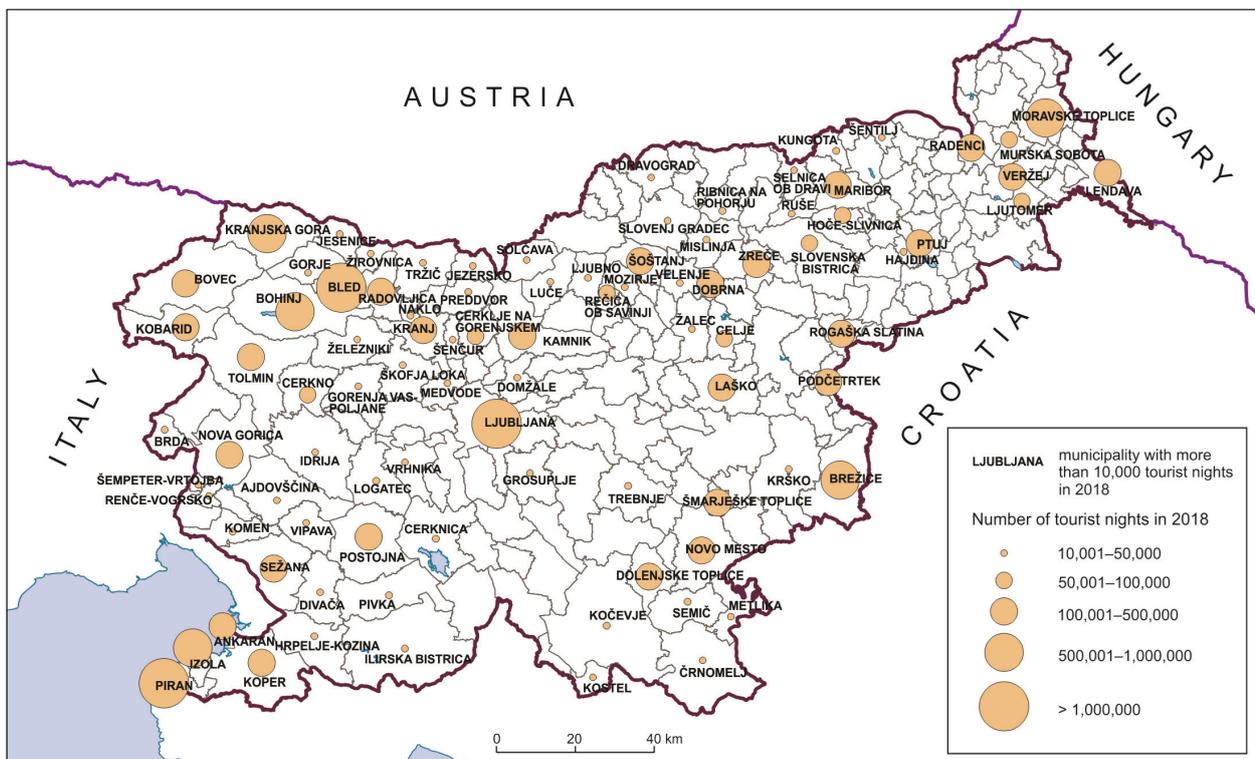


Fig. 3. Tourist nights by municipalities in 2018

Source: Statistical Office of the Republic of Slovenia, 2019.

throughout Slovenian territory (especially spas in the eastern half of Slovenia) – three distinct concentrations of tourism demand were easily recognisable (fig. 3). The first, spatially the least extensive, was the area of the Slovenian capital of Ljubljana, while the other two were more extensive: the Julian Alps area in north-western Slovenia and Slovenian Istria, i.e. the seaside municipalities. The popularity of these places was linked to especially attractive natural settings (Alpine mountains, Adriatic Sea) or urban tourism attractions.

The popularity of particular areas has been constantly changing, although the changes were very gradual. In 1990, the relative majority (26.4%) of all tourist nights was spent in **Slovenian Istria** (tab. 3). Its main attraction was, of course, the Adriatic Sea coast. To a lesser extent, the area was attracting tourists by its entertainment opportunities (especially in Portorož) and cultural heritage (Piran). The majority of tourist nights was spent by foreign (non-Yugoslav) tourists (in 1990 66.0%), followed by Slovenian (25.6%) and (other) Yugoslav tourists (8.4%). In 1991, the number of foreign tourists drastically fell. As a result, the share of Slovenian Istria in the total number of tourist nights in Slovenia dropped to just 20.5%. At the beginning of the 21st century the tourism image of Slovenia was no longer associated with war and political instability and foreign tourists returned to Istria. The share of nights spent in seaside resorts increased to the pre-war level and even exceeded it a little. Afterwards, another drop (tab. 3) could be observed – primarily as a consequence of higher growth in several regions in the interior of Slovenia. In the last years, numbers of tourists are still moderately increasing, but Slovenian Istria is already a mature tourism area and there are limited growth possibilities.

Julian Alps were attracting tourists because of visually attractive mountain scenery, outdoor recreation opportunities, and winter tourism offer, related to Alpine skiing. Even to a larger extent than Slovenian Istria, some municipalities in the Julian Alps depended on foreign tourism (Bled in the first place). After the breakup of Yugoslavia, the share of

Julian Alps in Slovenian tourism declined from 23.4% tourist nights in 1990 to 17.8% in 1992. Till 2010, the share of tourist nights, spent in this region, was around 20%. The changes in the last decade caused very explicit growth of the share of Julian Alps: in 2018, it was even 24.5%. Winter tourism remains stable despite the problems, related to unreliable snow cover. Its survival has been made possible by investments into snow-making equipment and by the fact that in the majority of cases summer season was traditionally of equal (or even greater) importance as the winter season (Cigale, 2013). In summer, various forms of outdoor recreation (adventure tourism) are gaining in importance. Bled as probably the most recognisable Slovenian tourist destination (along with Ljubljana) has also become a frequent part of European travel itineraries. In 2017, in Bled the largest number of nights was spent by tourists from the United Kingdom (11.9%), followed by Germans (9.2%), Italians (8.5%), tourists from the United States (6.3%) and tourists from “other Asian countries” (i.e. the sum of all Asian countries, with the exception of Israel, China, Japan and Republic of Korea, and, of course, Russia and Turkey; 5.9%).

The most marked growth has been experienced by the Slovenian capital of **Ljubljana**. Ljubljana has been traditionally Slovenian cultural, administrative and economic centre; therefore, a typical urban tourism has been developed. In 1990, 7.2% of tourist nights in Slovenia were registered in Ljubljana. The capital's share remained small throughout the 1990s (tab. 3) and in 2000 it was just 5.5%. In the last two decades, many changes (numerous events, introduction of pedestrian zones, old city centre renewal, etc.) have contributed to the increase of tourism attractiveness of Ljubljana. In 2018, after several years of constant increase of tourist numbers, 13.9% of all tourist nights were spent in Ljubljana. For the first time after 1991 it was the most visited Slovenian tourist destination.

Therefore, the data show that a spatial reconfiguration of Slovenian tourism took place, but only to a limited extent. The growth of the significance of the Slovenian capital should be mentioned in the

Tab. 3. Tourist nights by regions in % (1990–2018)

	1990	1991	1992	2000	2010	2018
Slovenian Istria	26.4	20.5	24.8	28.0	22.2	19.2
Julian Alps	23.4	21.8	17.8	19.8	19.9	24.5
Ljubljana	7.2	6.6	7.8	5.5	8.3	13.9
Slovenia	100	100	100	100	100	100

Note: *Julian Alps area*: the present-day municipalities Bled, Bohinj, Gorje, Kranjska Gora, Jesenice, Radovljica, Bovec, Kobarid, Tolmin, Žirovnica; *Slovenian Istria*: the present-day municipalities Piran, Izola, Koper, Ankaran.

Source: Statistical Office of the Republic of Slovenia, 2019; Letni pregledi turizma, 1990–2002.

first place. It is becoming a very popular destination of “global tourists”, who are visiting Europe or Central Europe (and not just Slovenia). On the other hand, strengthening of mountain destinations of the Julian Alps took place as well. Nowadays, their attraction is not related solely to aesthetic qualities of the mountain landscapes, but to an increasing extent to a numerous outdoor recreation opportunities, including artificial ones (e.g. bike parks, zip-line, etc.). It should also be pointed out that, since 1991, the concentration of tourist visits to these three areas has even intensified: the share of nights spent increased from 48.9% in 1991 to 57.6% in 2018.

5. Conclusions

Slovenian tourism after the independence underwent numerous changes, related to various factors. Its development was partly influenced by processes within the country and partly by more general social and environmental processes. This paper has focused only on some aspects of these changes. Among them are, in the first place, the ones, which are reflected in the changes of spatial characteristics of tourism.

Spatial distribution of tourist flows within Slovenia in the last three decades has been relatively stable. Concentrations of tourism have been related to spatially fixed place attributes, especially attributes of natural environment. Despite changing tastes and fashions, these attributes retain their importance, although their role can be changed or re-evaluated.

Inbound tourist flows to Slovenia have been more dynamic and affected by a wide array of factors. The most evident change is a strongly increased number of non-European tourists. On the one hand, it is influenced by Slovenian tourism policy, marketing and promotion activities, increasing diversity and richness of tourism offer, etc. On the other hand, it is affected by numerous interrelated events and processes on the global level, e.g. an increase of intercontinental tourist flows, especially from Asia, increasingly simplified travel planning and preparation (growing availability of information, ease of booking of various tourism services, etc.), which facilitate travel also for independent travellers, redirection of tourist flows to Europe (including Slovenia) because of deteriorating security and safety situation in several previously popular tourist destinations, etc.

The observed changes point out the fact that Slovenian tourism is increasingly embedded into globalization processes. These processes are, of course, not limited just to the increased share of tourists from non-European countries. Globalization related

processes include the foreign ownership of tourism enterprises (accommodation facilities, transport companies, both major airports, etc.), increasingly international workforce in tourism, or the increasing role of web sites, such as Booking.com and Airbnb.

Although “time-space compression” is very evident also within tourism, the role of distance is still very important and it greatly affects the nature of tourist flows in Slovenia. The majority of tourists still come from relatively nearby areas. This is especially true for short vacation trips, which are growing in importance. The regional tourist flows in the majority of Slovenian tourist destinations still prevail. They are also less sensitive to economic and political shocks and they will most probably remain crucial for Slovenian tourism.

The nature of inbound tourist flows affects the characteristics of spatial distribution of tourism in Slovenia. The growth is the strongest in a few places which are of special interest for long distance tourists. On the other hand, general growth of tourism results in spatial dispersion of tourist flows and tourism supply. As a consequence, even in many regions, which have been previously on the tourism periphery, tourism is appearing as a relevant force of change.

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