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CHINESE TOURISTS IN WESTERN BALKAN: FACTS AND FORECAST

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Chinese tourists in Western Balkan: facts and forecast

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1 INTRODUCTION

Tourism industry has became one of the most important and fastest-growing economic sectors in the world, according to some figures such as: 10.2 % of total world GDP, 9.7 % of total world employment (direct, indirect and induced impact)(WTTC, 2017), and 7 % of world exports with average growth rate at 3.3 % a year between 2010 and 2030 (UNWTO, 2016).The growth rate of tourism is higher than international trade concerning the period 2012 – 2016 (3.3 % in comparison to 3 %), and tourism as export category is on the third place after fuels and chemicals and ahead of food and automotive product (United Nations World Economic Situation Prospects, 2017).

The world most emerging source market, in this regard, is China[1]as world top tourism spender, since 2012. If the number of outbound Chinese tourists in 2008 was just over 20 millions, this number increased to 135.1 million in 2016, an increase of 5.7 % compared with the same period in 2015. There has been also exceptional increase in how many Chinese tourists spend abroad – in 2016 they've spent a USD 261.1 billion which is greater consumption at USD 139.6 billion than USA citizens spend traveling abroad, and it is 11.7 % growth rate (in local currency) in comparison to previous year, also China got over 1/5 market share (21.4 %) at world source market (UNWTO, 2017b).

In new one COTRI Market Report (Arlt & Deng-Westphal, 2017), it was stated a few travel attributes concerning Chinese outbound tourism in Europe.

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[1]Chinese different sources are treated differently. Thus, according to one methodology, it is only the region of the LR of China, others include Macao and Hong Kong. In particular, Taiwan may be considered. This is due to the fact that statistics on arrivals, overnight stays and consumption of Chinese tourists and from these countries are then mixed.

Europe, as destination, is accepted by 11.5 % of all outbound traveling beyond Hong Kong SAR or Macau SAR.

There is higher demand for variety of travel products including offerings in sports, health, wedding and cruise travel. Chinese football fans are increasingly more interested in, for example, UK, Spain and Germany. By exploring not just the world but themselves, Chinese travelers are, especially the new generation, asking for intellectual and artistic ideals. Still pursuing in experience of local culture when they traveling, Chinese also require China-friendly service and appreciate a feeling of home (Ibid).

Total international tourist arrivals (overnight visitors) increased by 3.9 % in 2016, reaching a record 1,235 million, up from 1,189 million in 2015 which means that 46 million more tourist traveled abroad or 300 million more tourists comparing the pre-crisis record in 2008. Demand for international tourism remained robust, with growth rate exceeding the long-term average rate in period 2010 – 2030 (3.3 %) for the seventh year in a row, following the 2009 global economic crisis and slightly above average rate in period 2010 – 2020 (3.8 %). The main travel region in 2016 is Europe (615 million travelers or 49.8 %), following by Asia and the Pacific (308.6 million travelers or 25 %), Americas (200.2 million or 16.2 %), Africa (57.8 million or 4.7 %) and Middle East (53.6 million or 4.3 %). By achieving yearly growth rate the leading region is Asia and the Pacific (+ 8.6 %), followed by Africa (+8.2 %), Americas (+ 3.9 %), Europe (+ 2.1 %), and Middle East (- 4 %). In 2017 there is forecast about yearly growth rate of international arrivals at + 3 % to + 4 % in world and + 2 % to + 3 % in Europe, + 5 % to + 6 % in Asia and Pacific and Africa both, + 4 % to + 5 % in Americas, and + 2 % to + 5 % in the Middle East(UNWTO, 2017d).

The most popular destinations, according to number of the international tourist arrivals, in 2016 were: France (82.6 million), United States (75.6 million), Spain

(75.6 million), China (59.3 million), Italy (52.4 million), Turkey (25.3 million), Germany (35.6 million), United Kingdom (35.8 million),Mexico (35.0 million) and Thailand (32.6 million). Comparing to the previous year in these destinations were achieved different growth rates: France (– 4.0 %), United States (– 2.3 %), Spain (+ 10.3 %), China (+ 4.2 %), Italy (+ 3.7 %), Turkey (–28.5 %), Germany (+ 1.7 %), United Kingdom (+ 3.4 %), Mexico (+ 8.9 %) and Thailand (+ 8.9 %) (UNWTO, 2017b).

Changes in hotel's occupancy rates comparing 2016 to 2015 are much minor than growth rates in regions: Asia and the Pacific + 1.0 %, Africa & Middle East – 1.6 %, Americas 0 % and Europe + 0.4 % (Ibid). That could point on variety of choice in accommodation establishments and main share of business travel in hotels.

In air transport sector, in 2016, there is stable growth rate in Europe concerning Revenue Passenger per Kilometers (RPK) (+ 4.2 %) which is below world growth rate (+ 6.1 %) and much below the highest growth rate in the Middle East with more than 10 % growth. The robust growth in airline capacity in Europe continued at + 4.2 %, which is in line with previous years and will be support for expected demand grows. European Airlines Passenger Load Factor is in line with demand growing in 2016 (80.3 %). The air traffic on European–Asian routes seems to continue to slow down due to security concerns and some slowdown in emerging markets. The air traffic between Europe and America continued to grow, mostly due to United States outbound travel (European Travel Commision, 2017).

In UN WESP (United Nations World Economic Situation Prospect) report (United Nations World Economic Situation Prospects, 2017) is described the main global frame regarding tourism flows. In 2016 world gross product expanded by 2.2 % with forecast to expand by 2.7 % in 2017 and 2.9 % in 2018 which is more indicator of economic stabilization than robust and sustained revival of global demand. In economies in transition is projected expand by 1.4 % of gross domestic product in 2017. East and South Asia will be region growing more rapidly comparing to others due to strong domestic demand and more accommodating macroeconomic policy (Ibid).

World trade volume grew up by 1.2 % in 2016, which is one of the three lowest rates in last 30 years, with projection to expand by 2.7 % in 2017 and 3.3 % in 2018 (Ibid).

There are three main factors, stated in report, which strongly shaped the tourism flows in 2015 and 2016, such as: strong exchange rate fluctuations, the decline in price of oil and other commodities and ongoing global concern about safety and security. Which means that those factors influenced on destination choice and consequently the size and direction of specific tourism flows rather than the size of overall tourism volume as stated in figures before (Ibid)?

Due to that reasons it could be expected that region with strongest growth rates regarding tourism flows will be Asia and Pacific at the moment on the second place (beyond Europe) in structure of tourism regional market shares. Changes in exchange rates influenced the shift of the purchasing power in many source markets and the competitiveness of many destinations. The appreciation of the US dollar, for example, fostered departure from USA, Euro area destinations and number of emerging economies benefitted for weaker currencies (Ibid).

Fall of oil, transport service and other commodity prices fostered tourism growth indubitably left more income in importing countries but lowered up demand from commodity exporting markets (Ibid).

The security and geopolitical tensions as main global challenge still remains and redirecting the travel flows. Terrorist actions in Belgium, Egypt, France, Tunisia and Turkey had obvious consequences regarding tourism industry but in other hand many destinations experienced double-digit growth such as Canada, Japan, Spain and Thailand (Ibid).

In that global frame, tourism industry realized very strong effects in domain of receipts and spending.

Total international tourism receipts reached USD 1,220 billion in 2016, up 2.6 per cent in comparison to 2015.

The bigger earner in 2016 in world is region Europe (USD 447.3 billion), followed by Asia and Pacific (USD 366.7 billion), Americas (USD 313.2 billion), Middle East (USD 57.6 billion) and Africa (USD 34.8 billion) (UNWTO, 2017b).

These regions achieved growth rates in earnings according to last year, as follows: Europe (+ 0.9 %), Asia and Pacific (+ 4.8 %), Americas (+ 2.7 %), Middle East (– 2.0 %) and Africa (+ 8.3 %) (Ibid).

United States are leading one in tourism receipts in 2016 getting USD 206.8 billion, followed by Spain USD 60.3 billion, Thailand USD 49.4 billion, China USD 44.4 billion, France USD 43.1 billion, Italy USD 40.6 billion, United Kingdom USD 39.6 billion, Germany USD 37.4 billion, Hong Kong (China) USD 32.7 billion, and Macao (China) USD 29.9 billion.

By growth rate in comparison to previous year the highest growth in first ten earners is recorded in Thailand (+ 14.7 %), followed by Spain (+ 7.1 %), Italy (+ 3.3 %), Germany (+ 1.7 %), United States (+ 1.1 %), China (– 1.2 %), United Kingdom (– 1.4 %), France (– 6 %), Macao (China) (– 3.4 %) and Hong Kong (– 9.3 %) (UNWTO, 2017d).

In area of tourism international expenditure and number of departures it is already mentioned China as leading one source market.
Second world source market is United States which spent in 2016 USD 123.6 billion and realized 100.3[2] million departures.
Other main world source markets in 2016 are: Germany (USD 79.8 billion and 119.5 million departures), United Kingdom (USD 63.6 billion and 70.8 million departures), France (USD 40.5 billion and 75,3 million departures), Canada (USD 29.1 billion and 53.0 million departures), Korea (ROK) (USD 26.6 billion and 22.4 million departures), Italy (USD 25.0 billion and 62.6 departures), Australia (USD 24.9 billion and 9.9 million departures) and Hong Kong (China) (USD 24.2 billion and 91.8 million departures) (UNWTO, 2017a;UNWTO, 2017).

The top spenders, concerning first ten source markets, in 2016, were tourists from Australia who spent USD 2,555 per departure. Chinese spent USD 1,932 and Koreans USD 1,187 per departure. Other travelers spent less per departure: United Kingdom (USD 903), Canada (USD 549), and Italy (USD 394), Hong Kong (China) (USD 262).
The top risers in 2016 (in local currency), regarding growth rate in first ten source markets in comparison to 2015, were United Kingdom (+ 13.8 %), China (+ 11.7 %), United States (+ 7.8 %), Australia (+ 6.0 %), Korea (ROK) (+ 5.4 %), Hong Kong (+ 5.1 %) France (+ 3.3 %), Germany (+ 3.2 %), Italy (+ 2.4 %) and Canada (+ 0.0 %) (Ibid).

Tourism industry is recognized as important tool in concept of sustainable development. The United Nations (UN) General Assembly at its 70th session declares the 2017 as "International Year of Sustainable Tourism for

[2] The number of departures in United States, Germany and France is not final due to lack of data in UNWTO statistics

Development (IY2017)”. In International Year resolution, it will be promoted tourism’ role in five areas, such as (UNWTO, 2017d):

- Inclusive and sustainable economic growth,
- Social inclusiveness, employment and poverty reduction,
- Resource efficiency, environmental protection and climate change,
- Cultural values, diversity and heritage,
- Mutual understanding, peace and security.

That means that tourism have to contribute in economical, social and environmental dimensions of sustainable development through creating new decent jobs and generating new revenues in accordance to declared goals. Tourism is the most recognizable, effective and sustainable opportunity for many developing and least developed countries to achieve faster development and poverty alleviation (United Nations World Economic Situation Prospects, 2017).

In 2016,10.2 million Chinese visited Europe which is 11.8 % of all outbound travel from China, and that is up 2 % from 2015 (European Travel Commision, 2017). The modest growth rate showing "a higher sensitivity to adverse events than other markets" (ETC Bulletin, 2018). More the 80 % of Chinese travelers visited Western (48.74 %) and Central/Eastern Europe (35.92 %), and less than 20 % visited Northern (8.61 %) and Southern Europe (6.73 %). In 2021 travel to Europe is projected at 14.0 % of all outbound travel from China. The highest growth rate in Chinese arrivals in 2016 comparing to 2015 was achieved in Latvia (+ 89.6 %) despite the fall in Turkey (– 49.1 %), Monaco (– 37.4 %) and Belgium (– 28.2 %) (European Travel Commision, 2017).

In West Balkan region the most attractive country (Figure 1: Western Balkan Countries and China), regarding Chinese travelers, is Croatia, followed by Slovenia, Serbia, Montenegro, Bosnia and Herzegovina and Macedonia.

Figure 1: Western Balkan Countries and China

How these countries fare with regard to attracting Chinese tourists? The review of statistical data showed a positive trend in the growth of Chinese arrivals, albeit perhaps slow in comparison to some other regions. It also showed substantial decrease in the average length of stay in some countries of West Balkan region, which should alarm the tourism planners as well as tourism providers. Why is the length of stay getting shorter by each year and which regions are profiting? What are the prospects concerning the number of Chinese arrivals? All this remains unknown due to lack of any research in this area.

The report prepared by three authors working on topic of Chinese outbound tourism attempts to provide at least some answers regarding the phenomena of Chinese tourists in West Balkan countries.

The main purpose of this report was to point on basic trends and to form recommendations how to market these destinations more efficiently. It is thus our hope the report will provide a vantage point for future research on the topic and will be in this regard of use for academics as well as practitioners in the field of tourism marketing and tourism planning.

2 WORLD TOURISM

2.1 General information

Not only the ranking of destinations has changed dramatically over the years, but also the sheer number of countries visited by tourists has increased tremendously. Here are some interesting observations about the number of international arrivals at the most popular destinations (Table 1: Top tourist destinations by international arrival in period 1950-2016):[3]

- The top 5 countries in the ranking accounted for 71 % of all arrivals in 1950, 31 % in 2010 and only 28 % in 2016.
- The “Other” category, which represents the all other countries beyond the first fifteen destinations in the ranking, accounted for only 3% of arrivals in 1950, but rose to 34 % in 1990, 44 % in 2010, and to48 % in 2016.
- Yugoslavia’s[4] ranking dropped from 9th in 1970 (3 % of total arrivals) (Kobašić, 1987) to 14th in 1990 (2 % of total arrivals) (Ibid), and finally to 19th in 2016[5] (1,45 % of total arrivals) (Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017).
- China is not only a very active outbound market; it has also become an extremely popular destination.

[3] http://tourismintelligence.ca/2011/07/26/global-ranking-of-destinations-and-source-markets/

[4] All Yugoslav countries together

[5] Total arrivals in countries in former Yugoslavia in 2016 (without mutual arrivals) was: 17.994.547

- Malaysia, Turkey and Hong Kong have made major inroads into the tourism market.

The tourism sector has been demonstrating its resilience for over 60 years (Levasseur, 2011).

Table 1: Top tourist destinations by international arrivals in period 1950 – 2016

Rank	1950		1970		1990		2000		2010		2016	
1	United states		Italy		France		France		France		France	
2	Canada		Canada		United States		United States		United States		United States	
3	Italy	71%	France	43%	Spain	39%	Spain	36%	China	31%	Spain	28%
4	France		Spain		Italy		Italy		Spain		China	
5	Switzerland		United States		Austria		China		Italy		Italy	
6	Ireland		Austria		Mexico		United Kingdom		United Kingdom		United Kingdom	
7	Austria		Germany		Germany	18%	Mexico		Turkey		Germany	
8	Spain	17%	Switzerland	22%	United Kingdom		Canada	15%	Germany	14%	Mexico	14%
9	Germany		Yugoslavia		Canada		Germany		Malaysia		Thailand	
10	United Kingdom		United Kingdom		China		Austria		Mexico		Austria	
11	Norway		Hungary		Greece		Poland		Austria		Malaysia	
12	Argentina		Czechoslovakia		Portugal		Greece		Ukraine		Hong Kong (China)	
13	Mexico	9%	Belgium	10%	Switzerland	9%	Portugal	9%	Hong Kong	11%	Turkey	10%
14	Netherlands		Bulgaria		Yugoslavia		Malaysia		Russian Federation		Greece	
15	Denmark		Romania		Malaysia		Netherlands		Canada		Russian Federation	
	Other	3%	Other	25%	Other	34%	Other	40%	Other	44%		48%
Total	25 million		166 million		436 million		683 million		880 million		1235 million	

Source: (Levasseur, 2011; UNWTO, 2017a; Wikipedia, 2017a)

The tourism flow in world during period 2000 to 2016 (

Table 2: Ten most visited tourist destinations countries (in millions of tourists)[6] could be presented by, using traffic light rating system and trends (In presented trend line there is possibility to convergence in arrivals among France and United States and Spain and China, what will be interesting if happened in future. Arrivals in United States are in sharp growth since 2008 and after fall from 2001. Also it could be noticed same line in Spain after fall in 2009 but its trend line diverge from United States (

[6]A traffic light rating system is a system for indicating the status of a variable using the red, yellow or green of traffic lights to indicate the positive or negative dynamics of particular variable.

Figure 2: Trend line in the top five destinations (in millions arrivals)).

Figure 2: Trend line in the top five destinations (in millions arrivals)

Table 2: Ten most visited tourist destinations countries (in millions of tourists)

Country	2000	2005	2010	2014	2015	2016
The world	**674**	**809**	**953**	**1,137**	**1,186**	**1,235**
France	77.2	75.0	77.6	83.7	84.5	82.6
USA	51.2	49.2	60.0	75.0	77.5	75.6
Spain	46.4	55.9	52.7	64.9	68.2	75.6
China	31.2	46.8	55.7	55.6	56.9	59.3
Italy	41.2	36.5	43.6	48.6	50.7	52.6
United Kingdom	23.2	28.0	28.3	32.6	34.4	35.8
Germany	19.0	21.5	26.9	33.0	35.0	35.6
Mexico	20.6	21.9	23.3	29.3	32.1	35.0
Thailand	9.6	11.6	15.9	24.8	29.9	32.6
Turkey	9.6	24.2	31.4	39.8	39.5	25.4

Source: (UNWTO, 2017b)[7]

The most attractive destinations are France and United States, which accept 10 to 20 million arrivals more than Spain. In first ten destinations there are half of them from Europe as most popular visiting region. It is worth to mention that first five countries in rank, account in average on 32 % of the total arrivals in world.

In presented trend line there is possibility to convergence in arrivals among France and United States and Spain and China, what will be interesting if happened in future. Arrivals in United States are in sharp growth since 2008

[7]UNWTO uses separate categories for tourists from PR China, tourists from SAR Macao, tourists from SAR Hong Kong and tourists from Republic of China (Taiwan).

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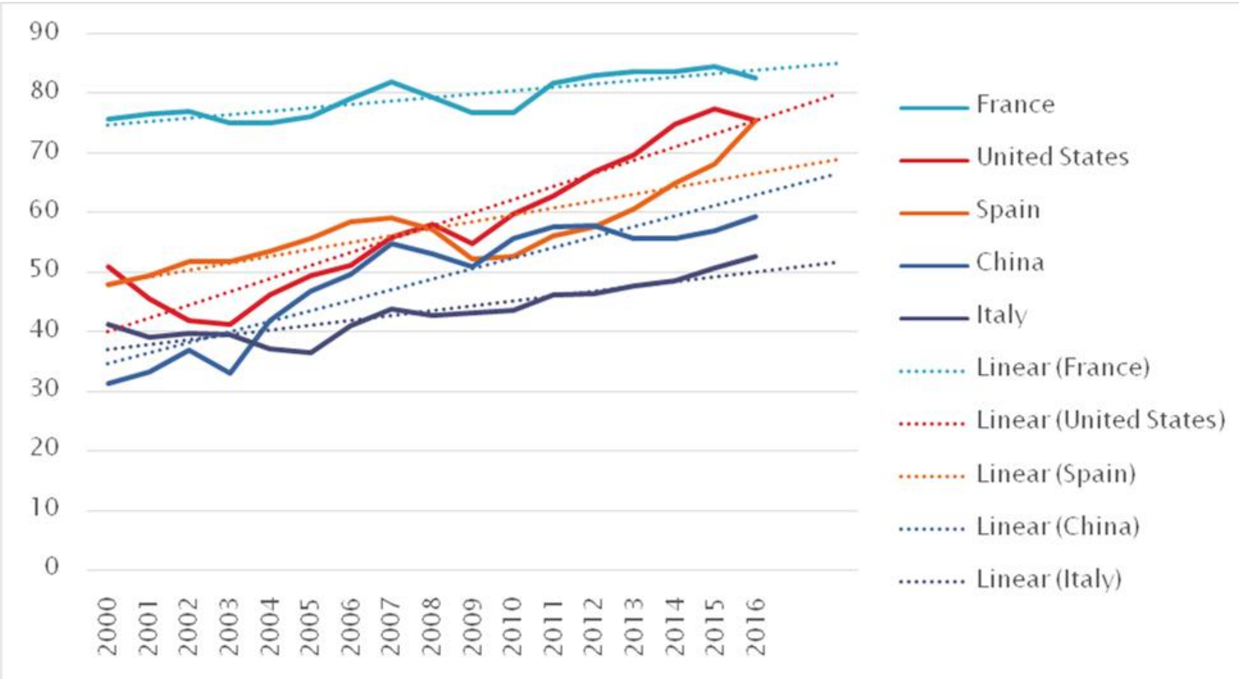


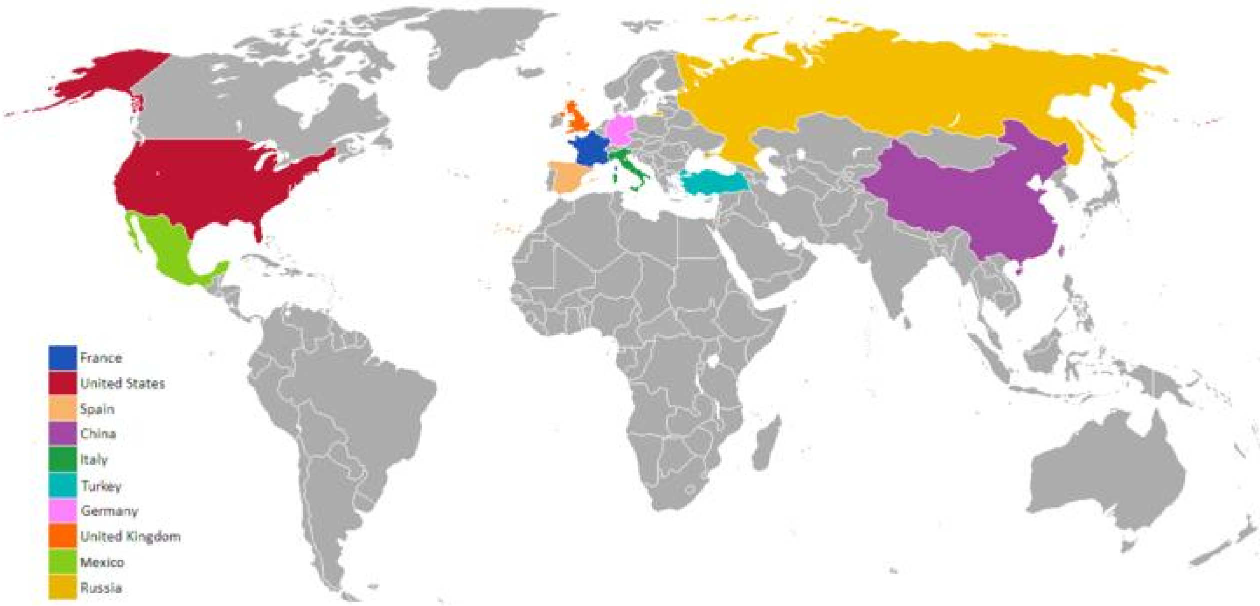
Source: (UNWTO, 2017b)

Since 2004 China became the 4th world destination by number or arrivals, ahead of Italy from that year.

These ten countries achieved very different average growth rate (geometric growth rate) in period 1995-2016 (The World Bank, 2017b). The Thailand achieved the most highest growth rate (7.63 %), followed by Turkey (6.26 %), China (5.30 %) and Germany (4.25 %) which all above world average growth rate in that period (4.15 %), and other countries below world average rate such as: Spain (4.03 %), USA (2.69 %), Mexico (2.64 %), Italy (2.54%), United Kingdom (2.42 %) and France (1.53 %) (Ibid).

The figure (World's Top 10 Tourism Destinations) presents 10 Most Visited Countries in The World 2014. Situation in 2016 is practical the same.

Figure 3: World's Top 10 Tourism Destinations



Source: (World Atlas, 2017)

There is a very interesting question: What makes some countries to be popular and to an attractive lot of visitors? Very comprehensive presentation of some countries as the most popular tourist destinations in the world is made by one interesting report, which follows (World Atlas, 2017)

10. Turkey

By its rich cultural heritage and ethnic diversity, Turkey is one of the very popular destinations. There are numerous historical, cultural and archaeological sites and charming seaside resorts along the Mediterranean and Aegean coasts (Ibid). Due to a lot of unfortunate incidences like attacks from the Islamic State (ISIS), the alleged shoot down of a Russian jet by Turkey, and the ensuing tension between the two countries, tourism industry suffers a very lot. The capital of Turkey is Ankara (Ibid).

9. Thailand

Thailand is a global tourist hotspot by its sunny, sandy beaches, tropical islands, rich wildlife, archaeological sites, temples and monasteries. There are many attractions in the country such as the vibrant and lively festivals of the country, the thriving nightlife, world-class shopping facilities, and delectable Thai cuisine. In its, directly and indirectly, manner, the tourism generated revenue contributes nearly. Medical tourism in Thailand is recognizable through world-class treatment at relatively lower costs for patients comparing to their homeland (Ibid).

8. Mexico

Since the 1960s its tourism has been heavily promoted by the Mexican government, as "an industry without smokestacks." (Ibid). According to the World Tourism Organization, Mexico is one of the most visited countries in American region, on the second place after the United States. Also, Mexico as a destination, has a significant number of UNESCO World Heritage sites which include ancient ruins, colonial cities, and natural reserves, and numerous of works of modern public and private architecture. In the early nineteenth century, Mexico has attracted foreign visitors thanks to cultural festivals, colonial cities, nature reserves and the beach resorts. A mix of the European and the Mesoamerican culture and very nice local temperate are attractive to tourists. The high seasons are during December and the mid-Summer, with "brief surges during the week before Easter and Spring break" (Ibid), when “many of the beach resort sites become popular destinations for college students from the United States” (Ibid).

7. Germany

Germany is considered as one of the safest tourist destinations globally and has a lot of tourists all over the world as well as domestic tourists. In the cities such as Berlin, Munich and Hamburg are the most popular cultural tourism and visitation in educational and business purposes, also. The Saxon Switzerland National Park, the Western Pomerania Lagoon Area National Park, and the Jasmund National Park as protected areas in Germany are visited by millions of tourists every year.

6. United Kingdom

The United Kingdom is ranked, by tourist arrivals, at 8th place in the world, thanks to "a long, interesting history, rich culture and well-developed tourism facilities and infrastructure" (Ibid). The main source markets are other parts of Europe and the United States and Canada. Domestic tourism is also very important. The most popular city is London with Tower of London as the most popular attraction in the country.

5. Italy

At the 5th place in the world, by a number of international arrivals, for many of the tourists is Italy, "of the dream destinations" (Ibid). There are "50 UNESCO World Heritage Sites, innumerable cultural artifacts, buildings, and archaeological sites from the Roman Empire and the Renaissance periods, along with the quaint Alpine villages and towns in the north of the country and fascinating Mediterranean coasts to the south" (Ibid), which describe this destination in the best way. The most visited cities are Rome, Venice, Florence, and Milan, "each with their unique attractions, history, culture and cuisine" (Ibid).

4. China

China as one of the most desired country in the world is recognizable by "the land of the Great Wall of China, the Fiver Sacred Mountains, the Shaolin Temple, the Huangguoshu Waterfall, the Forbidden City, the Three Gorges, and another natural, culturally and historically important site". By the estimation of the UNWTO, China will become the first one in world tourism industry, by 2020.

3. Spain

The main source markets for one of the most popular world destination, such as Spain, are United Kingdom, France, Italy and Germany. Tourism attractions in this destination are worldwide known, which include: "historical cities and towns of the country like Barcelona and Madrid, the world-class resorts at the Mediterranean and Atlantic coasts of the country, the popular festivals like the Carnival and the Running of the Bulls, 15 national parks, well-developed winter tourism facilities, and a bustling nightlife" (Ibid). Among these attractions, there are 13 cities which are regarded as UNESCO World Heritage Sites.

2. United States

As the vast country with numerous attractions, United States are globally known tourist destination. U.S. cities such as New York, Los Angeles, and Las Vegas are full of tourist all year around. Worldwide known natural attractions in this country are: "Grand Canyon, Yellowstone National Park, the Alaskan subarctic wonders the Hawaiian beaches" (Ibid). The tourism sector is in third place among other industries in 29 states in the country, generating a lot of employment opportunities. The main source markets are Mexico, Canada, and the United Kingdom and domestic tourism.

1. France

The France is one of the first destination in the world by a number of arrivals. The variety of natural and cultural attractions includes: "Paris, Lyon, Strasbourg, the Alpine mountains, ski resorts, beaches, picturesque French villages, spectacular gardens and parks, and more" (Ibid). This destination posses "37 UNESCO World Heritage Sites, that are well recognized globally for their outstanding universal value" (Ibid). Travel and tourism industry make 9.7 % of the national GDP (Ibid).

MasterCard has released its Global Destination Cities Index, which provides a ranking of the 132 most visited cities around the world(World Economic Forum, 2016).

Measured by the number of international overnight visitors, the study, now in its seventh year, predicts which countries will be the most visited in 2016.

From the Asia-Pacific region to Europe to the Middle East and Africa, here are the 20 cities set to see the most visitors this year (Ibid):

- 20) Prague, Czech Republic - 5.81 million international visitors
- 19) Shanghai, China - 6.12 million international visitors
- 18) Vienna, Austria - 6.69 million international visitors
- 17) Osaka, Japan - 7.02 million international visitors
- 16) Rome, Italy - 7.12 million international visitors
- 15) Taipei, Taiwan - 7.5 million international visitors
- 14) Milan, Italy - 7.65 million international visitors
- 13) Amsterdam, Netherlands - 8 million international visitors
- 12) Barcelona, Spain - 8.20 million international visitors
- 11) Hong Kong, China - 8.37 million international visitors
- 10) Seoul, South Korea - 10.20 million international visitors
- 9) Tokyo, Japan - 11.70 million international visitors
- 8) Istanbul, Turkey - 11.95 million international visitors
- 7) Kuala Lumpur, Malaysia - 12.02 million international visitors
- 6) Singapore - 12.11 million international visitors
- 5) New York City, USA - 12.75 million international visitors
- 4) Dubai, United Arab Emirates - 15.27 million international visitors
- 3) Paris, France - 18.03 million international visitors

- 2) London, England – 19.88 million international visitors
- 1) Bangkok, Thailand – 21.47 million international visitors.

2.2 Income from tourism

Next table (Table 3: Income from tourism by country (in billion USD)) presentes data about income from tourism industry.

Table 3: Income from tourism by country (in billion USD)

Country	2000	2005	2010	2014	2015	2016
The world	495.0	701.0	961.0	1,250.0	1,194.0	1,220.0
USA	100.2	101.5	137.0	191.3	204.5	206.8
Spain	30.9	49.7	54.6	65.1	56.5	60.3
Thailand	7.5	9.6	20.1	38.4	44.6	49.9
China	16.2	29.3	45.8	44.0	45.0	44.4
France	33.0	44.0	47.0	58.1	45.9	43.1
Italy	27.5	35.4	38.8	45.5	39.4	40.6
United Kingdom	22.2	31.1	32.4	46.5	45.5	39.6
Germany	18.7	29.2	34.7	43.3	36.9	37.4
Hong Kong (China)	5.9	10.3	22.2	38.4	36.2	32.7
Macao (China)	3.2	6.9	22.3	42.7	31.0	29.9

Source: (UNWTO, 2017b)

The main earner in world tourism industry are United States taking part at 13.5 % of all income and receiving income USD 140 billion more than Spain. In these ten countries are receiving nearly 50 % of total world income in tourism industry. It could be noticed that in most attractive destination such as France according to number of arrivals there is no the highest income which point on less revenue per arrival than in United States or Spain for example (Table 4: Income per arrival by countries (in USD), Figure 4: Trend line in the top five earners in tourism (in billion USD))).

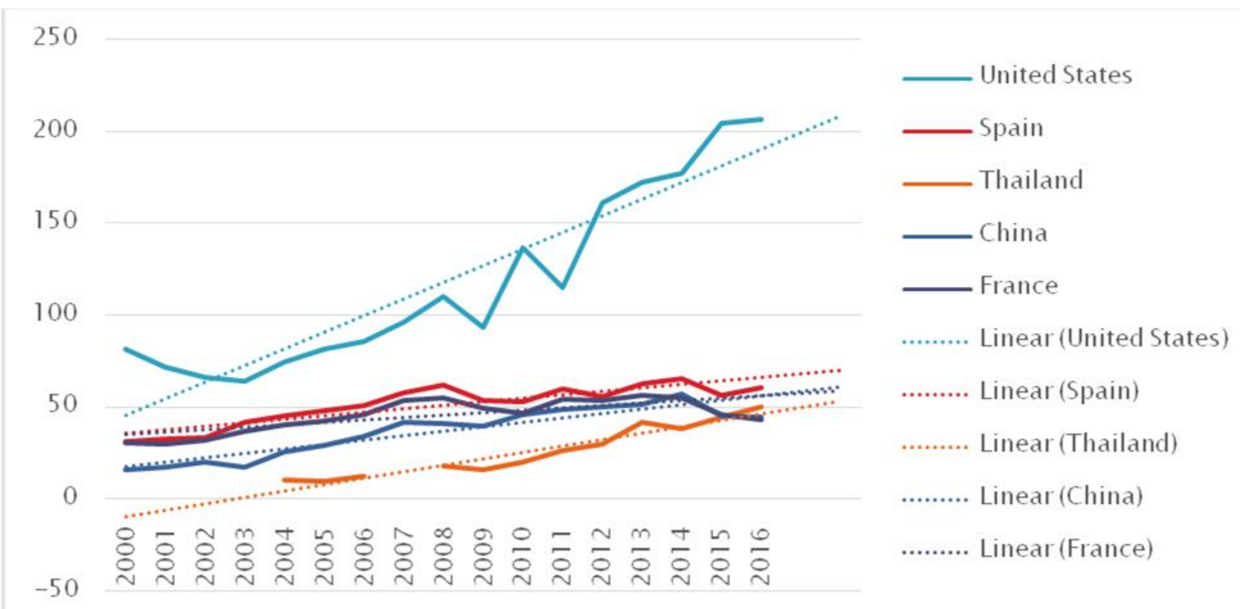
Table 4: Income per arrival by countries (in USD)

Country	2000	2005	2010	2014	2015	2016
The world	720.21	869.73	1,022.34	1,102.29	1,006.75	987.85
USA	1,968.57	2,054.66	2,294.81	2,557.49	2,638.71	2,735.45
Macao (China)		766.67	1,873.95	1,541.52	2,167.83	1,904.46
Thailand			1,261.77	1,548.39	1,491.64	1,530.67
Hong Kong (China)	450.38	700.68	1,110.00	1,386.28	1,355.81	1,233.96
United Kingdom	880.95	1,036.67	1,153.02	1,426.38	1,322.67	1,106.15
Germany	984.21	1,358.14	1,289.96	1,312.12	1,054.29	1,050.56
Spain	645.09	893.88	1,036.05	1,001.54	828.45	797.62
Italy	667.48	969.86	889.91	936.21	777.12	771.86
China	519.23	626.07	822.26	791.37	790.86	748.74
France	436.51	578.95	611.98	694.15	543.20	521.79

Source: (UNWTO, 2017b)

United States, Thailand, Macao (China), Germany, United Kingdom and Hong Kong (China) earn per arrival above world average (USD 987). The lowest income per arrival in first ten earners is in France.

Figure 4: Trend line in the top five earners in tourism (in billion USD)



Source: (UNWTO, 2017d)

When it comes about achieved average growth rate (geometric growth rate) in these first ten countries in period 1995-2016 (The World Bank, 2017b) it is noticed that the Macao SAR (China) achieved the most highest growth rate

(11.17 %), followed by Thailand (7.60 %), China (7.47 %) and Hong Kong SAR (China) (6.01 %) which all above world average growth rate in that period (4.47 %), and other countries below world average rate such as: Spain (3.87 %), USA (3.83 %), Italy (2.38 %), Germany (2.33 %), United Kingdom (1.86%) and France (1.68 %) (Ibid).

2.3 International tourism expenditure

International tourism expenditure signs on most attractive source markets and best spenders per capita (Table 5: Tourists' consumption by the country of origin (in billion USD)).

Table 5: Tourists' consumption by the country of origin (in billion USD)

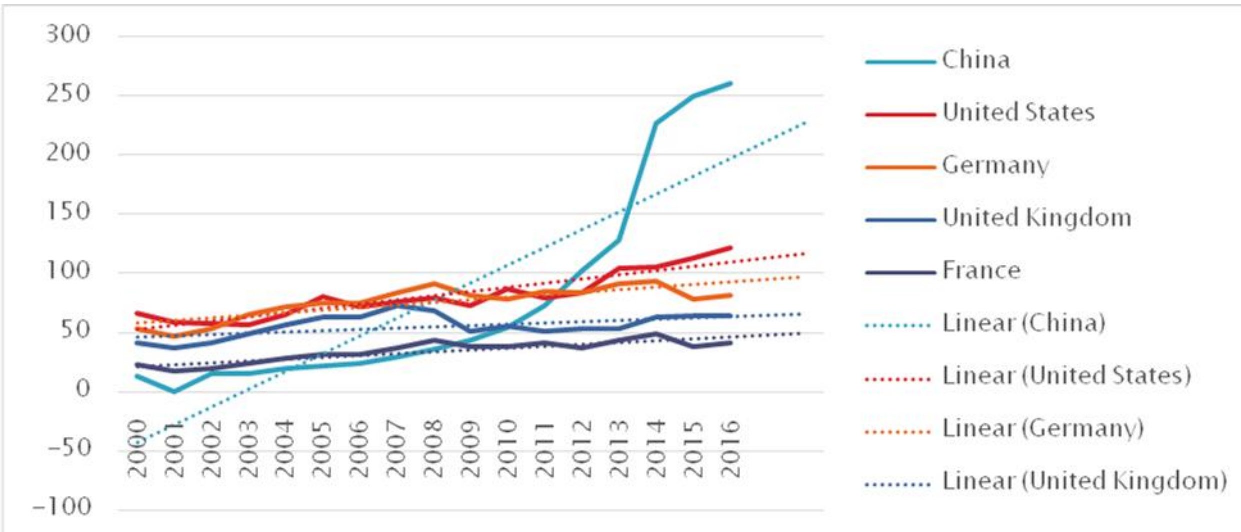
Country	2000	2005	2010	2014	2015	2016
The world	495	701	961	1,250	1,194	1,220.0
China	13.1	21.8	54.9	227.3	249.8	261.1
USA	65.8	80.0	86.0	105.5	114.7	123.6
Germany	53.0	74.4	78.1	93.3	77.5	79.8
United Kingdom	40.3	62.6	54.9	62.6	63.3	63.6
France	22.6	31.8	38.5	48.7	39.3	40.5
Canada	12.4	18.0	29.7	34.4	30.1	29.1
Korea (ROK)	7.1	15.4	18.8	23.2	25.3	26.6
Australia	6.4	11.8	22.5	26.9	23.8	24.9
Italy	15.7	22.4	27.1	28.8	24.4	25
Hong Kong (China)	12.5	12.3			23.1	24.2

Source: (UNWTO, 2017b)

Although United States are the best earners in tourism industry, their citizens also have spent the most in the world till 2010, for traveling abroad.

Even more striking is the growth of Chinese tourists' expenditure abroad (Table 5: Tourists' consumption by the country of origin (in billion USD), Figure 5: Trend line in first five top tourism spenders (in billion USD). If Chinese tourists abroad in 2000 spent »only« 13 billion USD, their consumption increased to 261,1 billion in 2016 which is almost 22 % of total tourist expenditure in world, and it is a forecast for more than 300 billion USD in 2017 by far the highest increase among 10 largest tourism spenders(UNWTO, 2017b).

Figure 5: Trend line in first five top tourism spenders (in billion USD)



Source: (UNWTO, 2017d)

The growth of Chinese tourism spending indicates on increasing difference to United States as second one spender in world. In 2016 Chinese tourists spent USD 139.6 billion more than travelers from United States.

By using average growth rate (geometric growth rate) in these first ten countries in period 1995-2016 (The World Bank, 2017b) it is very clear that China realized the most highest growth rate (22.47 %), almost quadruple than growth rate of Korea (ROK) at the second place (6.60 %), followed by Australia (6.04 %), Italy (5.35 %), and Hong Kong SAR (China) (5.20 %), all of them above world average growth rate (4.71 %), and other countries from the list of first ten spenders such us Canada (4.04 %), United Kingdom (3.70 %), USA (3.42 %), France (3.41 %) and Germany (0,87 %).

It is important to notice, concerning first five spenders, that China, Germany and United Kingdom have negative and United States and France have positive score in balance among tourism receipts and tourism spending, calculating in average in period 1995 to 2016, which could mean that negative scored countries are more source than receptive tourist destinations.

In 2016, Chinese tourists spent 12 % more in travelling abroad (UNWTO Press Release, 2017).

In this UNWTO press release is stated that *"2016 results on expenditure from major outbound markets reflect increasing demand for international tourism across the world, as reported in the latest UNWTO World Tourism Barometer. With a 12 % increase in spending, China continued to lead international outbound tourism, followed by the United States, Germany, the United Kingdom and France as top five spenders."* (Ibid)

In 2016, China made another strong year in the growth of outbound tourism, as the world's leading outbound market. The growth of international tourism expenditure from US$ 11 billion to US$ 261 billion points on increase by 12 % (in the local currency). 135 million Chinese travelled abroad in 2016, which is 6 % more than the previous year. Since 2012, China is number one source market in the world with the trend of double-digit growth in tourism expenditure in every year since 2004. Many destinations in Asia and Pacific such as Japan, the Republic of Korea and Thailand, and long-haul destinations such as the United States and a few in Europe benefited from such growth. The other Asian destination in first ten outbound destination in the world are: the Republic of Korea (US$ 27 billion) and Australia (US$ 27 billion) both realized 8 % growth in 2016 and Hong Kong (China) with growth at 5 % and US$ 24 billion of international tourism expenditure (Ibid).

The United States, as the world's second largest source market, rise up tourism spending in 2016, and realized US$ 122 billion, up US$ 9 billion on 2015, which is growing at 8 %. Strong outbound travel growth in the third consecutive year is mostly caused by a robust US dollar and economy. The number of U.S. international departures rose 8 % through November 2016 (74 million in 2015) (Ibid).

In contrary, in the second source market from the Americas, Canada, was recorded "flat results" (Ibid) with US$ 29 billion in international tourism spending and decline in international departures in 2016 by 3 % to 31 million (Ibid).

The four most important European source markets, Germany, the United Kingdom, France and Italy recorded growth in international tourism expenditure in 2016. Germany realized US$ 81 billion of international tourism spending in 2016, which is 5 % growth in comparison to previous year. Outbound demand in the United Kingdom in 2016 was up by 7 % than in 2015 and reach 70 million departures who spent close to US$ 64 billion, "despite the significant depreciation of the British pound in 2016" (Ibid). France realized US$ 41 billion in international tourism expenditure which is 7% growth than in 2015. In Italy, in 2016, was reported US$ 25 billion of international tourism spending (1 % growth) made by 29 million overnight trips (3 % growth) (Ibid).
Another fast-growing source markets in first 50 in the world, with double-digit growth in spending in 2016 are: Vietnam (+28 %), Argentina (+26 %), Egypt (+19 %), Spain (+17 %), India (+16 %), Israel and Ukraine (both +12 %), Qatar and Thailand (both +11 %). Due to weaker economies and currencies in some countries which are commodity exporters, outbound tourism continued to decline in 2016. International tourism expenditure in Russian Federation decreased in 2016 to US$ 24 billion, and also declined in Brazil to US$ 14.5 billion and Nigeria to US$ 1.1 billion(UNWTO, 2017d).

2.4 The most/Least countries overrun by tourists in world

It is very interesting to present some facts about most/least countries overrun by tourists in the world, using data from Priceonomics report (Kopf, n.d.). and his report is supplemented by new data from UNWTO(UNWTO, 2017b), World Bank ((The World Bank, 2017a),(The World Bank, 2017c)).

These data point to the carrying capacity of tourism in the destination.

Priceonomics report from 2014 was supplemented by new data and it is presented two lists of countries, as follows.
In the table (Table 6: The countries with the least tourist arrivals per inhabitant in world in 2016) are presented the countries with the least tourists per inhabitant in the world.
In another table (In next table are presented countries with most arrivals per inhabitant in the world in 2016.

As it is presented, in countries such as Bangladesh, Guinea and Niger, there are the smallest number of tourists per inhabitant and at this list, there is the greatest dispersion of tourists per km^2 in Chad, Niger and Mali.
In Andorra, Aruba and Monaco there are the most tourists per inhabitant in the world, and on that list, there is the highest intensity of tourists per km2 in Monaco, Hong Kong and Malta.

Table 7: Countries with most tourist arrivals per inhabitant in world in 2016) are presented the countries with most tourists per inhabitant in the world.

Table 6: The countries with the least tourist arrivals per inhabitant in world in 2016

Rank	Country	International arrivals	Population	Area (sq km)	Arrivals per capita	Arrivals per sq km
1	Bangladesh (2014)	125,000	162,951,560	130,170	0.000767	0.960283
2	Guinea (2015)	35,000	12,395,924	245,720	0.002824	0.142439
3	Niger (2015)	135,000	20,672,987	1,266,700	0.006530	0.106576
4	Sierra Leone	54,000	7,396,190	72,180	0.007301	0.748130
5	Chad (2015)	120,000	14,452,543	1,259,200	0.008303	0.095299
6	Ethiopia (2015)	864,000	102,403,196	1,000,000	0.008437	0.864000
7	Mali (2015)	159,000	17,994,837	1,220,190	0.008836	0.130308
8	India	14,569,000	1,324,171,354	2,973,190	0.011002	4.900124
9	Madagascar	293,000	24,894,551	581,800	0.011770	0.503609
10	Moldova	121,000	3,552,000	32,870	0.034065	3.681168

***Remark**: In some countries are presented data for arrivals in previous years due to data from UNWTO

Source: (UNWTO, 2017a; The World Bank, 2017a; The World Bank, 2017c)

In next table are presented countries with most arrivals per inhabitant in the world in 2016.

As it is presented, in countries such as Bangladesh, Guinea and Niger, there are the smallest number of tourists per inhabitant and at this list, there is the greatest dispersion of tourists per km^2 in Chad, Niger and Mali.

In Andorra, Aruba and Monaco there are the most tourists per inhabitant in the world, and on that list, there is the highest intensity of tourists per km2 in Monaco, Hong Kong and Malta.

Table 7: Countries with most tourist arrivals per inhabitant in world in 2016

Rank	Country	International arrivals	Population	Area (sq km)	Arrivals per capita	Arrivals per sq km
1	Andorra	2,831,000	77,281	470	36.63	6,023.40
2	Aruba	1,102,000	104,822	180	10.51	6,122.22
3	Monaco	336,000	38,499	2	8.73	168,000.00
4	Palau	138,000	21,503	460	6.42	300.00
5	Iceland	1,792,000	334,252	100,250	5.36	17.88
6	Malta	1,966,000	436,947	320	4.50	6,143.75
7	The Bahamas	1,482,000	391,232	10,010	3.79	148.05
8	Bermuda	244,000	65,331	50	3.73	4,880.00
9	Hong Kong	26,553,000	7,346,700	1,050	3.61	25,288.57
10	Maldives	1,286,000	417,492	300	3.08	4,286.67

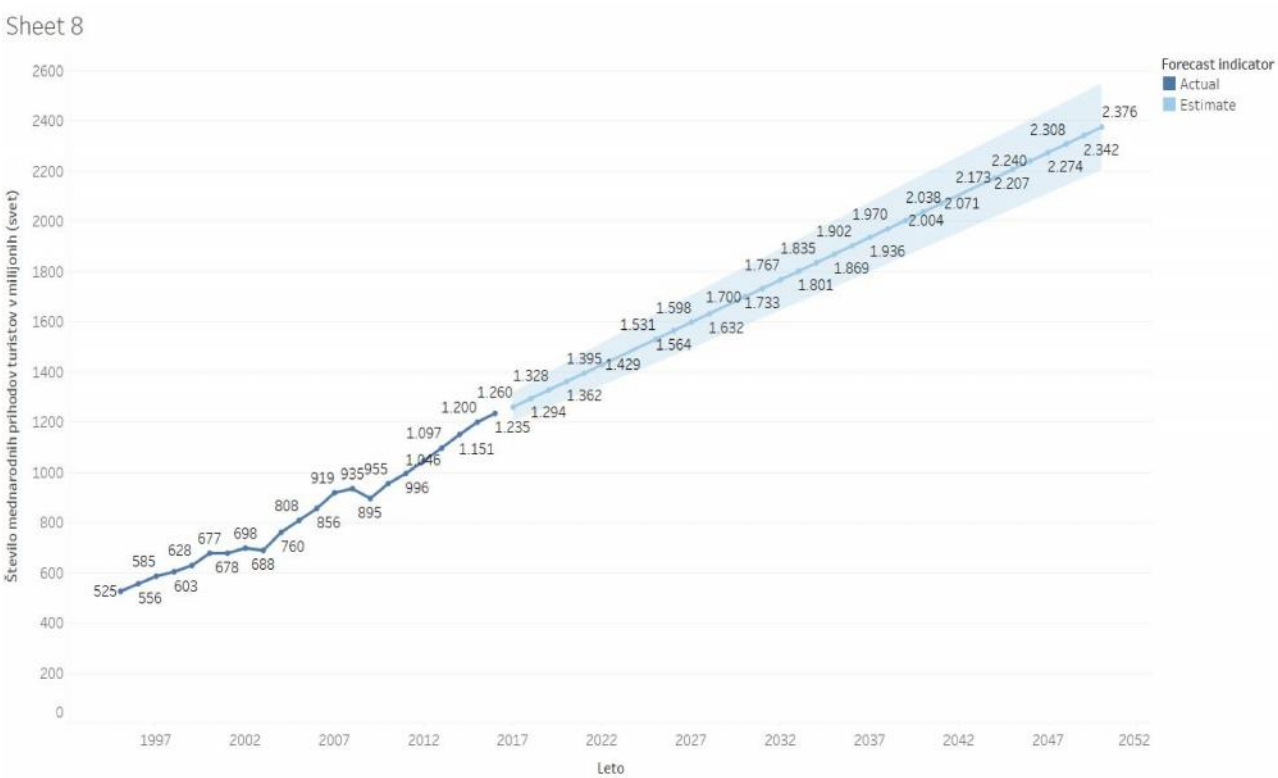
Source: (UNWTO, 2017a; The World Bank, 2017a; The World Bank, 2017c)

2.5 Long-term trends and predictions

As it was previously discussed, forecasts of international tourist arrivals predict an average of 3.3 % increase until 2030 (UNWTO, 2017b) In absolute numbers, international tourist arrivals are expected to increase by almost 43 million per year on average between 2010 and 2030 compared with an increase of 28 million per year during the period from 1995 to 2010. At this rate, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020 and 1.8 billion by the year 2030. From a regional perspective, Asia and the Pacific is expected to witness the strongest growth in tourist arrivals, where the forecast suggests an increase by 331 million over the 2010-2030 period to reach 535 million in 2030 with a growth of 4.9 % per year (Ibid). Tourist arrivals are also expected to double in the Middle East (from 61 million to 149 million) and Africa (from 50 million to 134 million) in the period from 2010 to 2030 (Ibid). In contrast, projections suggest that growth in Europe (from 475 million to 744 million) and the Americas (from 150 million to 248 million) will be slower compared with the projections for other regions (Ibid). Moreover, emerging economy destinations are expected to experience nearly twice as much growth in international tourist arrivals (þ4.4 % a year) as advanced economy destinations (þ2.2 % a year), exceeding the total number of arrivals in advanced economies before 2020. As a result, it is expected that in 2030, 57 % of international arrivals will be in emerging economy destinations (versus 30 % in 1980) and the remaining 43 % in advanced economy destinations (vs. 70 % in 1980) (Ibid).

In next figure are presented actual data and forecast concerning international tourist arrivals in world, in period 1997-2050.

Figure 6: Actual trend and forecast of international tourist arrivals in period 1997 - 2050



Source: (UNWTO, 2017b; own processing)

By probability at 90 %, it could be expected 2,376 million of international arrivals in the world in 2052. Expected number of international arrivals would be realized by the average growth rate (GRR) at (1.9 %) which is calculated per period from 2018 to 2050).

3 EUROPA

In this section we present a tourism flows in Europe.

In Southern/Medit.Europe is realized 35.40 % and in Western Europe 33.56 % of all arrivals (in average in period 1995-2016), followed by Central/Eastern Europe (19.56 %) and Northern Europe (11.47 %). Balkan countries take part at 2, 68 % of all arrivals (Table 8: International tourist arrivals in Europe countries in period 2000-2016 (in thousands of tourists)).

Table 8: International tourist arrivals in Europe countries in period 2000-2016 (in thousands of tourists)

Country	2000	2005	2010	2014	2015	2016
Denmark	3,535	9,587	9,425	10,267	10,424	
Finland	1,971	2,080	2,319	2,731	2,622	2,789
Iceland	303	374	489	997.6	1,289	1792
Ireland	6,646	7,333	7,134	8,813	9,528	
Norway	3,104	3,824	4,767	4,855	5,361	
Sweden	3,828	4,883	5,183	5,660	6,482	
United Kingdom	23,212	28,039	28,295	32,613	34,436	35,184
Northern Europe	**44,599**	**58,125**	**59,622**	**67,950.6**	**72,157**	**39,765**
Austria	17,982	19,952	22,004	25,291	26,719	28,121
Belgium	6,457	6,747	7,186	7,887	8,355	7,479
France	77,190	74,988	76,647	83,701	84,452	82,600
Germany	18,983	21,500	26,875	32,999	34,970	35,579
Liechtenstein	61,6	49.8	49.8	53.7	48.6	69
Luxembourg	852	913	805	1,038	1,090	1,054
Monaco	300	286	279	329	331	336
Netherlands	10,003	10,012	10,883	13,925	15,007	15,007
Switzerland	7,821	7,229	8,628	9,158	9,305	10,402

Country	2000	2005	2010	2014	2015	2016
Western Europe	**139,650**	**141,677**	**153,357**	**174,382**	**180,278**	**180,647**
Armenia	45	319	684	1,204	1,192	1,260
Azerbaijan	0	693	1,280	2,160	1,922	2,045
Belarus	60	91	119.3	136.8	102	
Bulgaria	2,785	4,837	6,047	7,311	7,099	8,252
Czech Republic	4,773	6,336	6,334	8,096	8,707	12,090
Estonia	1,220	1,917	2,372	2,918	2,989	3,143
Georgia	387	560	2,032	5,516	5,901	2,175
Hungary	2,992	3,446	3,462	4,618	4,929	15,256
Kazakhstan	1,471	3,143	2,991	4,560		
Kyrgyz Republic	59	319	855	2,849	3,051	
Latvia	509	1,116	1,373	1,843	2,024	1,793
Lithuania	1,083	2,000	1,507	2,063	2,071	2,296
Poland	17,400	15,200	12,470	16,000	16,722	17,463
Moldova	18	67	64	93.9	94.4	121
Romania	5,264	5,839	7,498	8,442	9,331	2,471
Russian Federation	21,169	22,201	22,281	32,421	33,729	24,551
Slovak Republic	1,053	1,515	1,327	1,475	1,721	
Tajikistan	7.7		160	213	414	
Turkmenistan	3.4	11.6				
Ukraine	6,431	17,631	21,203	12,712	12,428	13,333
Uzbekistan	302	242	975			

Country	2000	2005	2010	2014	2015	2016
Central/Eastern Europe	**67,032**	**87,484**	**95,034**	**114,632**	**114,426**	**106,249**
Andorra	2,949	2,418	1,808	2,363	2,670	2,831
Cyprus	2,686	2,470	2,173	2,441	2,659	3,187
Greece	13,096	14,765	15,007	22,033	23,599	24,799
Israel	2,417	1,903	2,803	2,927	2,799	2,900
Italy	41,181	36,513	43,626	48,576	50,732	52,372
Malta	1,216	1,171	1,339	1,690	1,783	1,966
Portugal	5,599	5,769	6,756	9,092	9,957	11,423
San Marino	43	50	120	75	54	60
Spain	46,403	55,914	52,677	64,939	68,215	75,563
Turkey	9,586	20,273	31,364	39,811	39,478	25,352.21
Balkan Countries[8]	7,633	11,185	15,795	21,047	23,377	25,141
Southern/Medit.Europe	**132,809**	**152,431**	**173,468**	**214,994**	**225,323**	**225,594**
Europe total	**384,090**	**439,716**	**481481**	**571,958**	**592,184**	**552,255**

Source: (The World Bank, 2017;UNWTO, 2017a)

Looking at the average growth rate (geometric growth rate) in period 1995-2016, it could be seen that Southern/Medit. Europe has the highest average growth rate (4.26 %), followed by Central/Eastern Europe (3.51 %), Northern Europe[9] (3.4%), which is above Europe average growth rate (3.05 %), and Western Europe (2.29 %). Balkan countries have an extremely high average growth rate in that period (11.05 %).

[8] Detailed data about international arrivals in individual Balkan countries are presented in chapter 5 Balkan region

[9] Average growth rate is calculated in period 1995-2015 due to lack of data.

The highest (Table 9: International tourism receipts in Europe in period 2000–2016 (in million USD)) average growth rate[10] in period 1995–2015[11] is achieved in Armenia (25.85 %), followed by Kyrgyz Republic (24.85 %), Georgia (23.62 %), Montenegro[12] (19.57 %), Albania (13.93 %), Croatia (11.32 %), Serbia[13] (10.61 %) and Bosnia and Herzegovina[14] (10.57 %).

France took the most part of structure of all arrivals in 2016 (14.96 %), followed by Spain (13.68 %), Italy (9.48 %), Germany (6.44 %), United Kingdom (6.37 %), Austria (5.09 %), Turkey (4.59 %), Greece (4.49 %), Russian Federation (4.45 %), and Poland (3.16 %).

[10] It is important to note that the number of arrivals in 1995 in these countries was extremely low than in 2015/2016 due to well known political and economic facts in those regions of Europe.

[11] It is calculated in that period due to lack of data in 2016 for these countries.

[12] Average growth rate is calculated in period 2002–2016 due to lack of data.

[13] Average growth rate is calculated in period 2002–2016 due to lack of data.

[14] Average growth rate is calculated in period 1997–2016 due to lack of data.

Table 9: International tourism receipts in Europe in period 2000-2016 (in million USD)

Country	2000	2005	2010	2014	2015	2016
Denmark	3,671	5,293	5,704	7,617	6,685	6,877
Finland	2,035	3,069	4,510	3,679	2,560	2,717
Iceland	386	635	562	1,375	1,618	2,415
Ireland	3,517	6,780	8,187	11,093	10,802	5,186
Norway	2,521	4,243	5,299	7,503	6,385	5,205
Sweden	4,825	7,628	10,674	11,846	11,307	12,614
United Kingdom	29,978	39,684	40,138	58,935	60,744	39,615
Northern Europe	**48,933**	**69,337**	**77,084**	**104,062**	**102,116**	**74,629**
Austria	11,382	18,471	18,758	20,907	18,273	19,300
Belgium	6,592	10,881	11,395	15,235	13,084	11,839
France	38,534	52,139	56,187	66,803	54,003	42,481
Germany	24,943	40,531	49,128	55,939	47,393	37,433
Liechtenstein						
Luxembourg	1,686	3,770	4,519	6,153	4,875	4,292
Monaco						
Netherlands	11,285	8,770	11,653	18,632	19,320	14,054
Switzerland	8,988	11,949	17,617	21,417	19,588	15,937

Country	2000	2005	2010	2014	2015	2016
Western Europe	**103,410**	**146,511**	**169,257**	**205,086**	**176,536**	**145,336**
Armenia	52	243	694	994	956	968
Azerbaijan	68	100	792	2,713	2,535	2,714
Belarus	188	346	665	1,230	1,016	710
Bulgaria	1,364	3,063	3,807	4,518	3,583	3,634
Czech Republic	2,973	5,772	8,068	7,614	6,758	6,309
Estonia	657	1,229	1,065	2,231	1,818	1,536
Georgia	107	287	737	1,972	2,117	2,166
Hungary	3,809	4,761	6,595	7,487	6,944	5,653
Kazakhstan	403	801	1,236	1,701	1,734	1,549
Kyrgyz Republic	20	94	212	468	481	432
Latvia	172	446	640	1,244	1,133	867
Lithuania	430	920	958	1,383	1,310	1,185
Poland	6,128	7,161	10,037	12,924	11,354	10,977
Moldova	57	138	222	322	285	245
Romania	394	1,324	1,631	2,225	2,097	1,729
Russian Federation	3,429	7,805	13,239	19,451	13,249	7,788
Slovak Republic	441	1,282	2,335	2,619	2,411	2,748
Tajikistan		9.1	32	220	146	4
Turkmenistan						
Ukraine	563	3,542	4,696	2,264	1,656	1,078
Uzbekistan	63	28	121	0	0	0

Country	2000	2005	2010	2014	2015	2016
Central/Eastern Europe	**21,318**	**39,351**	**57,782**	**73,580**	**61,583**	**52,292**
Andorra						
Cyprus	2,098	2,618	2,424	2,920	2,489	2,762
Greece	9,262	13,453	13,858	19,481	17,260	14,618
Israel	4,611	3,427	5,824	6,348	6,061	5,722
Italy	28,706	38,374	38,438	45,547	39,420	40,246
Malta	731	924	1,066	1,521	1,367	1,447
Portugal	6,027	9,042	12,985	17,723	15,819	14,036
San Marino						
Spain	32,656	49,565	54,305	65,100	56,426	60,346
Turkey	7,636	20,760	26,318	38,766	35,413	18,743
Balkan Countries[15]	4,619	11,380	15,376	18,236	16,570	16,819
Southern/Medit.Europe	**96,346**	**149,543**	**170,594**	**215,642**	**190,825**	**174,739**
Europe total	**270,007**	**404,742**	**474,717**	**598,370**	**531,060**	**446,996**

Source: (The World Bank, 2017; UNWTO, 2017a)

The highest stake in income distribution, has Western Europe 36.49 % and Southern/Medit.Europe with 35.97 % of all international tourism receipts (in average in period 1995-2016), followed by Northern Europe (16.89 %) and Central/Eastern Europe (10.65 %). Balkan countries realized 2,59 % of all international tourism receipts.

The highest growth rate, by average growth rate (geometric growth rate) in period 1995-2016, has Central/Eastern Europe (4.64 %), followed by Southern/Medit.Europe (3.70 %), which is above Europe average growth rate (2.93 %), Northern Europe (2,57 %) and Western Europe (1.89 %). Balkan countries have an extremely high average growth rate in that period (9.93 %).

The highest average growth rate[16] in period 1995-2015[17] is achieved in Kyrgyz Republic (25.65 %), followed by Armenia (23.51 %), Serbia[18] (21.3 %), Belarus

[15] Detailed data about international arrivals in individual Balkan countries are presented in chapter 5 Balkan region

(19.67 %), Georgia[19] (19.36 %), Latvia (18.66 %), Azerbaijan (18.36 %), Albania (16.99 %), Macedonia (14.19 %) and Lithuania (13.61 %).

In structure of all international receipts in 2016 the highest portion has Spain (13.50 %), followed by France (9.50 %), Italy (9.00 %), United Kingdom (8.86 %), Germany (8.37 %), Austria (4, 32 %), Turkey (4.19 %), Switzerland (3.57 %), Greece (3, 27 %) and Netherlands (3.14 %).

The highest income per arrival in 2016 was achieved in Liechtenstein (US$ 4,072.11), followed by Poland (US$ 2,024.79), Greece (US$ 1,973.10), Austria (US$ 1,582.97), Netherlands (US$ 1,532.11), Finland (US$ 1,347.66), Armenia (US$ 1,327.14), Montenegro (US$ 1,228.75), Sweden (US$ 1,125.94), France (US$ 1,052.11), which is all above average income per arrival in Europe (US$ 809.40).

Western Europe (

Table 10: International tourism expenditure in Europe in period 2000-2015 (in billion USD)) is far away from other European regions with 46.88 % of all international tourism expenditure (in average in period 1995-2015), followed by Northern Europe (26.44 %), Southern/Medit.Europe (15.03 %) and Central/Eastern Europe (11.65 %). Balkan countries spent just 0.85 % of total.

Looking at the average growth rate (geometric growth rate) in period 1995-2015, in the first place is Central/Eastern Europe (6.15 %), followed by Northern Europe (4,80 %), Southern/Medit.Europe (3,82 %), which is above Europe

[16] It is important to note that the international tourism receipts in 1995 in these countries was extremely low than in 2015/2016 due to well known political and economic facts in those regions of Europe.

[17] It is calculated in that period due to lack of data in 2016 for these countries.

[18] Average growth rate is calculated in period 2002-2016 due to lack of data.

[19] Average growth rate is calculated in period 1997-2016 due to lack of data.

average growth rate (3.63 %), and Western Europe (1.89 %). Balkan countries have an extremely high average growth rate in that period (7.82 %).

Table 10: International tourism expenditure in Europe in period 2000-2015 (in billion USD)

Country	2000	2005	2010	2014	2015
Denmark	4,669	6,850	9,082	10,443	8,918
Finland	2,293	3,622	5,267	5,286	4,772
Iceland	471	991	599	972	998
Ireland	2,626	6,186	7,178	6,173	5,774
Norway	4,893	10,400	14,658	20,166	17,090
Sweden	8,959	11,088	13,973	15,823	14,410
United Kingdom	47,009	74,659	65,875	77,429	79,602
Northern Europe	**72,920**	**115,801**	**118,642**	**138,306**	**133,579**
Austria	7,001	11,077	10,122	10,849	9,100
Belgium	9,429	16,771	18,866	26,438	21,118
France	26,703	38,643	46,704	59,377	46,835
Germany	57,601	84,537	90,883	106,663	88,843
Liechtenstein					
Luxembourg	1,309	3,015	3,626	3,948	3,369
Monaco					
Netherlands	13,649	13,724	19,044	22,417	21,110
Switzerland	7,360	10,550	13,460	19,941	18,495

Country	2000	2005	2010	2014	2015
Western Europe	**123,052**	**178,317**	**202,705**	**249,633**	**208,870**
Armenia	56	255	641	1,101	1,057
Azerbaijan	138	188	856	3,163	2,743
Belarus	247	516	748	1,308	1,004
Bulgaria	764	1,858	975	1,459	1,346
Czech Republic	1,276	2,603	4,354	5,173	4,913
Estonia	253	530	633	1,338	1,125
Georgia	129	237	329	563	609
Hungary	1,722	2,721	2,897	2,712	2,468
Kazakhstan	483	940	1,489	2,163	2,155
Kyrgyz Republic	28	94	275	568	445
Latvia	281	655	648	908	801
Lithuania	261	743	849	1,058	1,131
Poland	3,417	5,894	9,100	9,540	8,523
Moldova	86	170	298	450	366
Romania	447	1,071	1,897	2,636	2,330
Russian Federation	8,848	17,963	30,169	55,383	38,436
Slovak Republic	341	1,122	2,146	2,622	2,260
Tajikistan		3.8	25	35	25
Turkmenistan					
Ukraine	561	3,078	4,134	5,470	4,750
Uzbekistan				0	0

Country	2000	2005	2010	2014	2015
Central/Eastern Europe	**19,338**	**40,642**	**62,463**	**97,650**	**76,487**
Andorra					
Cyprus	533	988	1,611	1,771	1,439
Greece	4,564	3,045	3,401	4,001	3,537
Israel	3,733	3,780	4,725	5,583	6,244
Italy	18,169	26,774	26,908	28,857	24,417
Malta	224	311	309	397	359
Portugal	2,754	3,742	4,692	5,379	4,782
San Marino					
Spain	7,710	15,175	16,930	17,969	17,347
Turkey	1,713	3,563	5,817	5,475	5,686
Balkan Countries[20]	1,618	3,128	5,245	5,539	4,844
Southern/Medit. Europe	**41,018**	**60,506**	**69,638**	**74,971**	**68,655**
Europe total	**256,328**	**395,266**	**453,448**	**560,560**	**487,591**

Source: (The World Bank, 2017; UNWTO, 2017a)

By individual average growth rate[21]in period 1995-2015in international tourism expenditure there is the highest rate in Armenia (23.10 %), followed by Albania (23.58 %), Kyrgyz Republic (23.07 %), Ukraine (16.87 %), Azerbaijan (15.09 %), Latvia (13.65 %), Lithuania (12.17 %), Belarus (12.17 %), Estonia (11.797 %) and Kazakhstan (10.437 %).

The highest portion of structure of all international tourism expenditure in 2015 has Germany (18.30 %) followed by United Kingdom (16.39 %), France (9.65 %), Russian Federation (7.92 %), Italy (5.03 %), Belgium (4.35 %), Netherlands (4.35 %), Switzerland (3.81 %), Spain (3.57 %) and Norway (3.52 %).

[20] Detailed data about international arrivals in individual Balkan countries are presented in chapter 5 Balkan region

[21] It is important to note that the international tourism receipts in 1995 in these countries was extremely low than in 2015/2016 due to well known political and economic facts in those regions of Europe.

Iceland realized the highest tourism expenditure per departure in 2015[22] (US$ 2,217.78), followed by Luxembourg (US$ 1979.44), Moldova (US$ 1,970.92), Belgium (US$ 1949.05), France (US$ 1757,54), Tajikistan (US$ 1,562.50), Belarus (US$ 1496,27), Switzerland (US$ 1359.83), Cyprus (US$ 1,285.97), United Kingdom (US$ 1211.23), which is all above average income per arrival in Europe (US$ 983.45).

In terms of balance among arrivals and departure (calculating in average in period 1995-2016), there are positive scores (first ten countries) in France, Spain, Italy, Turkey, Greece, Austria, Croatia, Andorra, Ireland and Montenegro; and negative scores (first ten countries) in Germany, United Kingdom, Poland, Hungary, Sweden, Netherlands, Russian Federation, Finland, Switzerland and Portugal.

Looking at balance among international tourism receipts and expenditure (calculating in average in period 1995-2015), there are positive scores (first ten countries) in Spain, Turkey, Italy, France, Greece, Austria, Portugal, Croatia, Hungary and Czech Republic; and negative scores (first ten countries) in Germany, United Kingdom, Russian Federation, Norway, Belgium, Netherlands, Sweden, Denmark, Finland and Kazakhstan.

Concerning these data it could mean that positive scored countries are more receptive than source tourist destinations and vice versa.

[22] Ibidem

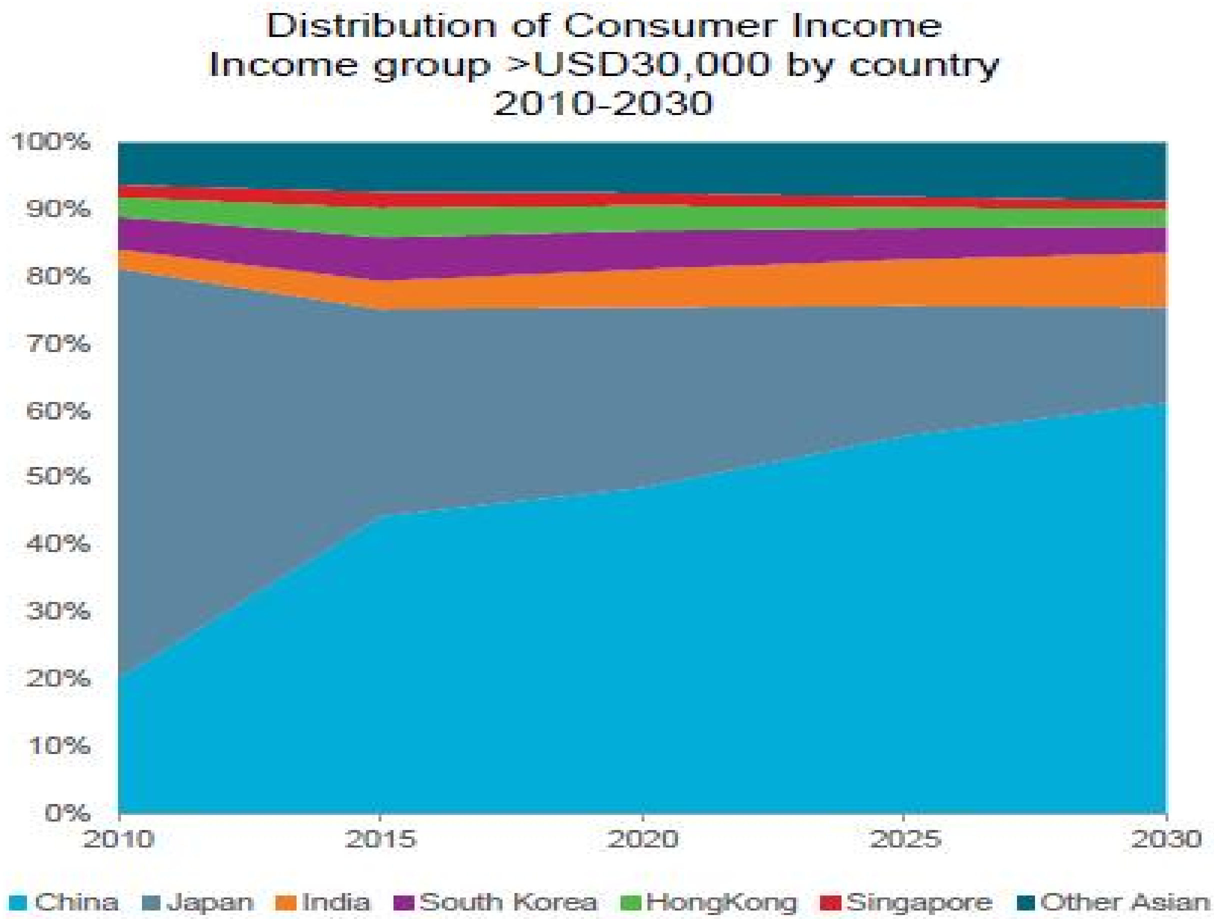
4 CHINA

4.1 General economic information

China is the fastest growing economy in the world by the growth of the gross domestic product. In Statistic report (Statista The Statistics portal, 2018) is stated data about past, actual and future trend line of that growth on the base of year-on-year change. In 2010 the growth rate was 10.61 %, in 2011 9.46 %, in 2012 and 2013 7.7 %, in 2014 7.3 %, in 2015 6.9 % and in 2016 growth rate was 6.7 %. The growth rate was projected in 2017 6.2 % and in 2018, 2019, 2020 and 2021 6 % per each year. In this report is forecasted that average annual growth rate of the gross domestic product will be in period 2015-2020 7 %, in the period 2021-2025 5.9 % and in period 2016-2030 5 % which is considerably lower than 9.9 % in period 1995-2010 and 8.6 % in period 2011-2015.

Looking at the distribution of consumer income groups (income group > USD 30,000) by countries in Asian region in period 2010-2030 it could be noticed the some changes.

Figure 7: Distribution of Consumer Income Groups in Asia in period 2010-2030

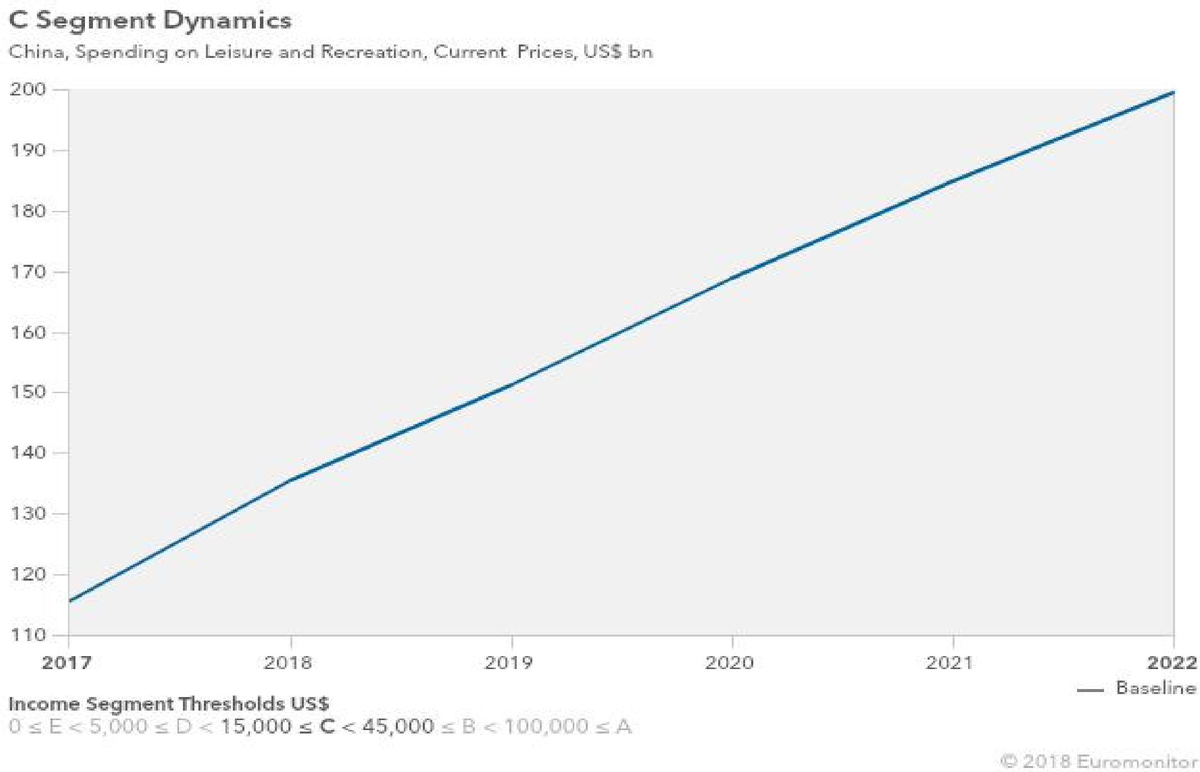


Source: (Euromonitor International, 2018b)

As it is presented, China is projected to make the greatest shift from 20 % to more than 50 % share in income distribution in 2030.

Another point of view is household consumption (The medium income segment household "C": USD 15,000 ≤ C < USD 45,000) in China concerning the leisure and recreation in period 2017-2022.

Figure 8 Household spending on Leiusure and Recreation, Current Prices (in billion USD)



Source: (Euromonitor International, 2018a)

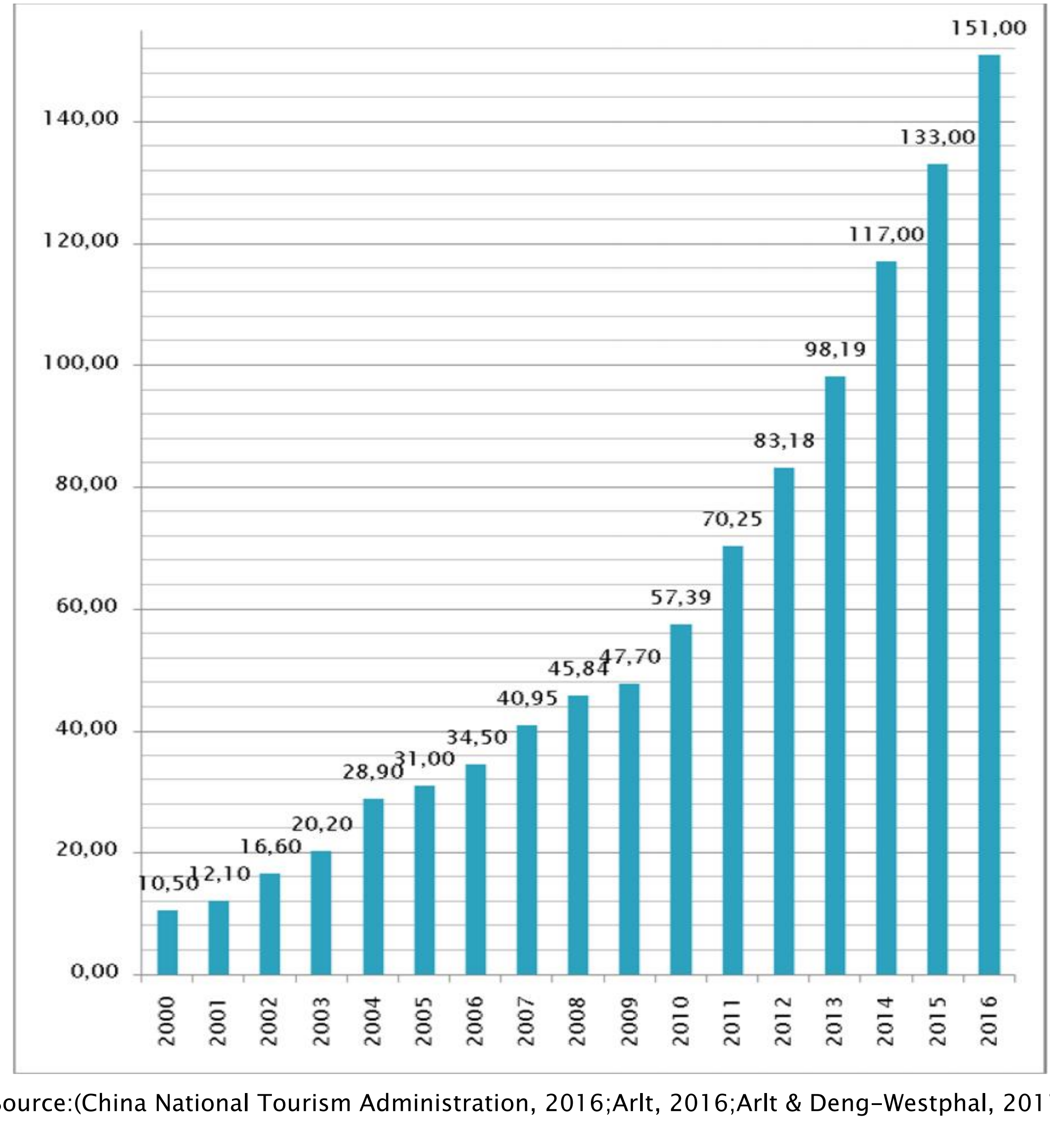
The stated household consumption which could be related to travel industry shows significant growth and points on long-term orientation to the greater need for consumption for leisure and recreation products.

This observation points on expected slow-down of the Chinese economy in the future period in one hand, but with stable growth in consumption on leisure and recreation product in other hand, which sign on some consequences on outbound tourism flows which will be discussed later (Section 7: Forecast).

4.2 Review of Chinese outbound tourism

Next figure (Figure 9: Border crossings from Mainland China in millions 2000-2016) presents border crossing from Mainland China in period 2000-2016.

Figure 9: Border crossings from Mainland China in millions 2000-2016



Source:(China National Tourism Administration, 2016;Arlt, 2016;Arlt & Deng-Westphal, 2017)

It is very clear that cross boarding of Chinese tourists growing up and strong influence on world tourism flows with the observation from the previous chapter concerning economic trends in the future period.

Regarding to Hotels report (Hotels.com, 2016), it could be noted that the most popular countries/regions for Chinese travelers from Mainland China in 2015 were United States, Thailand, Japan, Hong Kong, Taiwan, Australia, South Korea, France, Italy and United Kingdom and most popular cities in same year, were Hong Kong, Bangkok, Phuket, Tokyo, Taipei, Las Vegas, New York, Seoul, Los Angeles and Chiang Mai. As it could be seen European countries are in the lower part of the preferred list and on the other list there are not any European cities.

In same report (Ibid) is suggested that most popular shopping destinations were Hong Kong, Japan, South Korea, Australia and Macau; for local gastronomy the most popular were Japan, Hong Kong, South Korea, Taiwan and Australia; regarding resort/beach the most popular were Maldives, Australia, Japan, Fiji and Hong Kong; most popular destinations for backpacking were Australia, Hong Kong, Japan, Cambodia and Macau; for adventure the most popular destinations were Australia, Cambodia, Japan, India and Nepal; the most popular destination for local culture exploration were Japan, Australia, India, Cambodia and Brunei. The most popular destinations for sightseeing were Australia, Japan, Hong Kong, Maldives, South Korea, Singapore, Thailand, Macau, Malaysia and France. As it is seen, European countries are not among the most popular, except France (Ibid).

The most valued criteria for Chinese travelers in choosing destinations are(Ibid): safety (18 %), historical sites (14 %), cuisine (8 %), ease of visa application (7 %), value for money (7 %), shopping (6 %), reputation (6 %), political situation (6 %), climate (5 %), good public transport (3 %), local festivals (3 %),quality of accommodations (3 %), hospitality of locals (3 %), hygiene (2 %), currency (2 %), inspired by drama/film (2 %), nightlife (2 %), medical facilities (1 %) and sports event (1 %) (Ibid).

In this report (Ibid) is indicated that Chinese travelers spend in average US$ 3,455 on travel per year and that is ca. 25 % of their yearly income (US$ 14,610). The Chinese travelers born post 60s have highest yearly income (US$ 17,750) and spend in average US$ 4,577 on travel per year. Chinese travelers spend in average, beyond hotel (local expense) US$ 306 and in hotel US$ 130.

The most preferred type of hotel is independent hotel with local flavor (34 %), international chain hotel (32 %), Chinese style hotel (16 %), boutique hotel (10 %), and eco friendly hotel (8 %). The most important hotel facilities for Chinese travelers are Internet access (23 %), restaurant (21 %), room service (14 %), in-room movies (9 %), shops (6 %), gym, business centre, swimming pool (5 %), spa, casino/gaming area, bar (3 %), The most wanted type of digital equipment which are used by Chinese travelers are smart phone (84 %), digital camera (54 %), tablet computer (50 %), laptop (22 %), Wi-Fi dongle (8 %), feature phone (7 %) and e-readers (5 %). The main reasons for travel for Chinese tourists are leisure (93 %), business (40 %), visiting friends and relatives (16 %), cruise (14 %), education (6 %) and beauty treatment (5 %). Five main activities for Chinese travelers during holiday are dining (56 %), sightseeing (56 %), shopping (42 %), resort/beach (32 %) and eco/green tours (27 %). Five main source of information were online accommodation websites (44 %), friends & colleagues (44 %), travel guides (43 %), online review sites (43 %) and travel agents (42 %). Chinese travelers most preferred to book his travel through online travel agent (74 %), hotel (16 %) and travel agency (10 %) (Ibid).

By this report there are five market segments concerning Chinese travelers such as detailed explorers, cautious connectors, experience seekers, indulgers, basic pleasure seekers ranged by size on market (Ibid).

In another report which has been made by Resonance Consultancy Ltd (Resonance Consultancy Ltd., 2016), is also stated the preferable list of destinations visited by Chinese travel in 2015 such as Hong Kong & Taiwan, Thailand, France, Japan, United States, United Kingdom, Italy, South Korea, Spain and Germany. There are more European countries on this list in comparison to the previous report. The most popular activities during the holiday are sightseeing, cultural experiences, food, shopping, entertainment, adventure sports and wellness. September, April, February and July are the most wanted months for Chinese to travel (Ibid).

Top sightseeing spots are Musée du Louvre (France), La Tour Eiffel (France), Victoria Harbour (Hong Kong, China), Victoria Peak (Hong Kong, China), Ocean Peak (Hong Kong, China), The Grand Palace (Thailand), La Sagrada Familia (Spain), Cathédrale Notre-Dame de Paris (France) The Stars Avenue (Hong Kong, China) and La Seine (France) (Ibid).

The most interesting shopping segments are the mall, luxury shopping, cultural/outdoor shopping chains, outlet shopping and tobacco/alcohol. Average spending per shoppers in Europe in first six months was US$ 1,112. (Ibid).

The most popular hotels are Sheraton Macao Hotel, Cotai Central (Macau), The Venetian Macao Resort Hotel (Macau), The Royal Pacific Hotel and Towers (Hong Kong), Regal Riverside Hotel (Hong Kong), Harbour Plaza Metropolis (Hong Kong), Lotte Hotel Seoul (Seoul), PJ Hotel Seoul (Seoul), Pullman Bangkok King Power (Bangkok), Mandarin Hotel Managed by Centre Point (Bangkok) and The Palmer House Hilton (Chicago). In the report is also observed that "top hotel brands like Hilton and Marriott are attracting Chinese travelers with amenities and services that make Chinese guests feel at home", such as for example Hilton's Huanying program ("Welcome" in Mandarin) (Ibid).

In Expedia report (Expedia MediaSolutions, 2017) it was signed that Chinese spend in their travel budget 18 % per hotel, 15 % per flight, 16 % per food, 11 % per attractions/tours 15 %, per shopping 11 %, per alternative accommodations 1% and other 3 %.

One of the analysis in COTRI report (Arlt & Deng-Westphal, 2017) signs on globally and Europe destinations which achieved the most growth and the most drop of Chinese travelers in 2016 on YoY comparison. It points to growth in Nepal (+56 %), Vietnam (+51 %), Chile, Egypt, South Africa, Philippines and Mexico (+30 %). In Europe as mostly FIT destinations the most growth achieved Georgia, Bosnia & Herzegovina, Iceland, Norway, Poland and Serbia (+40 %) (Ibid). Also, it is highlighted that “terrorist events and exaggerated news about problems created by refuges kept some safety-conscious Chinese from travelling to Spain, Italy, France, Greece and Switzerland which all suffered double-digit percent losses” (Ibid). Germany recorded small drop down due to reason that the most of Chinese travelers were business travelers. Turkey recorded the highest drop in Chinese arrivals (-47 %) (Ibid).

There are few important notes about Chinese online travel market.
The major share on Chinese OTAs (online travel agencies) market, nearly 80 %, have Ctrip (36 %), Qunar (30 %) and Alitrip (15 %) yet all other OTAs have 19 % (Arlt & Deng-Westphal, 2017).
It is very often emphasized that the representation of social media types in China is significantly different from the usual acceptability. Facebook (facebook.com), Twitter (twitter.com), Tumblr (tumblr.com) and other popular social media sites have limited access to China (Mainland China). Instead, they developed a series of local social media such as Renren (renren.com), Sina Weibo (weibo.com), and Tencent Weibo (t.qq.com) that cover almost 91% of Chinese Internet users (Go-Globle.com).
The leading social media in China have a large number of users, such as Qzone (600 million users), Sina Weibo (500 million users), Wechat (438 million active users at the monthly level) and Tencent QQ (800 million active users per month level) (“Social Media influences Chinese travellers,” 2015).
The most important online information sources for Chinese travelers in trip planning are official WeChat (48 %), WeChat Moments (47 %), specialized travel

websites (42 %), app push messages (37 %) and WeChat shares by travel advisers (35 %) (The Momentum Group TMG Worldwide, 2016; in: Raspor & Lacmanović, 2017).

In one already mentioned report by Resonance Consulting Ltd., it is claimed that social media is the most important factor in the decision-making process when choosing a tourist destination and that Chinese bloggers are powerful means of sharing travel experiences. Particular importance to the social media is given by independent travelers / FIT's (Free Independent Travelers) who use platforms such as Weibo and WeChat with more than a billion users. Buying sites Ctrip, Qyer, Quanr and Elong enabled young educated, technologically high-visibility and global travelers to create their own travel arrangements(Resonance Consultancy Ltd., 2016).

Some characteristics about Chinese outbound tourism is presented in following report through five facts(Lehr, 2017).

Firstly, number of Chinese tourists in one decade is more than tripled making that one out of every ten international tourists is coming from China. The most popular destinations are Thailand, Japan and South Korea, with raising interest in other countries which relax their visa policies. Egypt, the UAE, Morocco and Tunisia as popular destinations, among others, establish visa-free travel for Chinese tourists.

Secondly, Chinese source market is young and growing. It is projected 234 million departures in 2020. It is expected growth of "travel-hungry millennial fresh from university and eager to explore the world is helping drive the surge" (Ibid) and middle class in China. It is estimated that Chinese travel abroad when household income reach US$35.000 (240.000 yean) and in last ten years 21 million of households get on this level, with projections that 61 million households will reach that line in 2023. Another fact is that only four percent of Chinese population holds a passport.

Thirdly, Chinese tourists spend more than any other tourists in world. In 2019 they will spend US$ 264 million, which is in size of Finland's economy and larger than Greece's. Half of spending budget is aimed to shopping activities mostly on luxury goods.

Fourthly, Chinese tourists change behavioral pattern away from shopping. Travel programs based on longer trips, with museums visits, spa packages and natural sights become more popular such as "High-End Travel around the World for 80 Days" trip. Another trip which is very popular is Antarctic, visited by one-third of luxury travelers. Business leaders promote adventure travel such as Mount Everest, including "China Vanke Founder and Chairman Wang Shi, Antaeous Group Executive President Wang Qiuyang, Sohu Inc. CEO and Chairman Zhang Chaoyang, and Beijing Zhongkun Investment Group Co. Founder and Chairman Huang Nabo" (Ibid).

Fifthly, tourism companies are still not quite ready for Chinese travelers. For example, "most American museums have yet to offer Chinese speaking guides or even self-guided tours narrated by native Chinese speaker" (Ibid).It is suggestion that in hotels could be offered, for instance, Union Pay terminals in order to attract more Chinese tourists. Another emerging segment is young Chinese business travelers with projections that 74 million will graduate college in the next decade. Unique experiences such as music tourism, themed adventure trips could bring the next generation of Chinese travelers.

In new Sabre Asia Pacific report "The Evolving Chinese Traveller" (Goh, 2017; (Toh, 2017)it is emphasized some of the key findings about behavior of Chinese travelers.

Almost 90 % of Chinese travelers have sufficient fund for travel and want to travel more frequently in comparison to the period five year ago. Additional drivers for more travelling are "higher disposable income (20 %), technologies making travel more convenient (17 %) and easy access to relevant travel information (15 %)" (Ibid).

The travel motivations of Chinese travelers are due to relax (25 %), to have good time with friends or family (22 %), to seek a better understanding of foreign cultures (17 %), to self-discovery (10 %), for an adventure (9 %), due to religious purposes/pilgrimage (8 %), business purposes (8 %) and others (1 %).

There are two main attitudes of modern Chinese travelers concerning travel: 49 % of them understand travel as means of personal improvement and 51 % see it as the new form of social currency. This new form of social currency means that travel becomes a way to connect and build stronger emotional bonds (57 %) and mod to enrich life experiences sharing it with friends and relatives (56 %) (Ibid).

In a new era of Chinese "mass tourism," it becomes more important quality of travel and personalized travel experiences.

The flexibility of independent planning is more often request which mean that 74 % of respondents stated that they are ready to spend time and energy to plan their journey (Ibid).

The key planning preferences of Chinese travelers are joint planning with external support (36 %), rely on myself with some external support (24 %), rely solely on myself (22 %), rely on external support with some inputs for me (12 %) and rely solely on external support (6 %) (Ibid).

In travel planning process, Chinese travelers are looking at the support and information from travel agencies for more information on local culture and history on destinations (64 %), more information on famous local attractions and places to visit (56 %) and more relevant and personalized travel information (52 %); from airline flight and travel details that can be easily accessed from airports and local destinations (55 %); on demand access to customer services and information (37 %) and streamlined booking service e.g. one-stop portal (35 %); from hotel/accommodation services personalized services (44 %), on demand access to customer service and information (43 %) and more opportunities for cultural exchange e.g. cultural immersion through accommodations (Ibid).

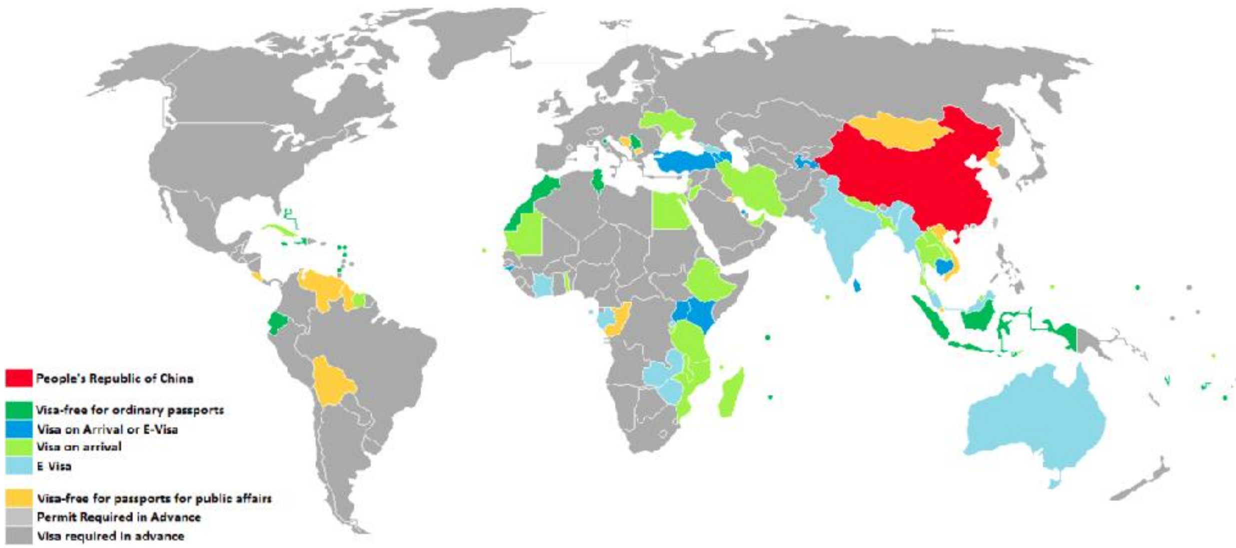
4.3 Viza sistem

4.3.1 Visa requirements for Chinese citizens

In this chapter the visa requirements of Chinese citizens is discussed, with the right of abode in Mainland China, as well as Visa requirements for Chinese citizens of Hong Kong and Visa requirements for Chinese citizens of Macau for the visa requirements of Chinese citizens with the right of abode in Hong Kong and Macau respectively. Visa requirements for Taiwanese citizens for visa requirements for travelers from the Republic of China, too (Taiwan) (Wikipedia, 2017b).

Visa requirements for Chinese citizens are administrative entry restrictions imposed for citizens of China by the authorities of other states. According to the January 1st 2017 Henley visa restrictions index, holders of a Chinese passport are granted visa free or visa on arrival access to 51 countries and territories, ranking the Chinese passport 85th in the world (tied with the Bhutanese, Chadian, Malian and Rwandan passports). The Ministry of Foreign Affairs of the People's Republic of China, however, listed Chinese citizens as having visa-free or visa on arrival access to 58 countries and territories as of November 22, 2016 (Figure 10: Visa requirements for Chinese citizens). Before February 2014, Chinese immigration authorities did not generally allow mainland Chinese citizens to board outbound flights without a valid visa for the destination country even if the destination country granted a visa on arrival to Chinese passport holders unless the exit was approved by the Ministry of Public Security. Exceptions were possible if the traveler had a third country's visa and a connecting flight from the destination country to the third country (Wikipedia, 2017b).

Figure 10: Visa requirements for Chinese citizens



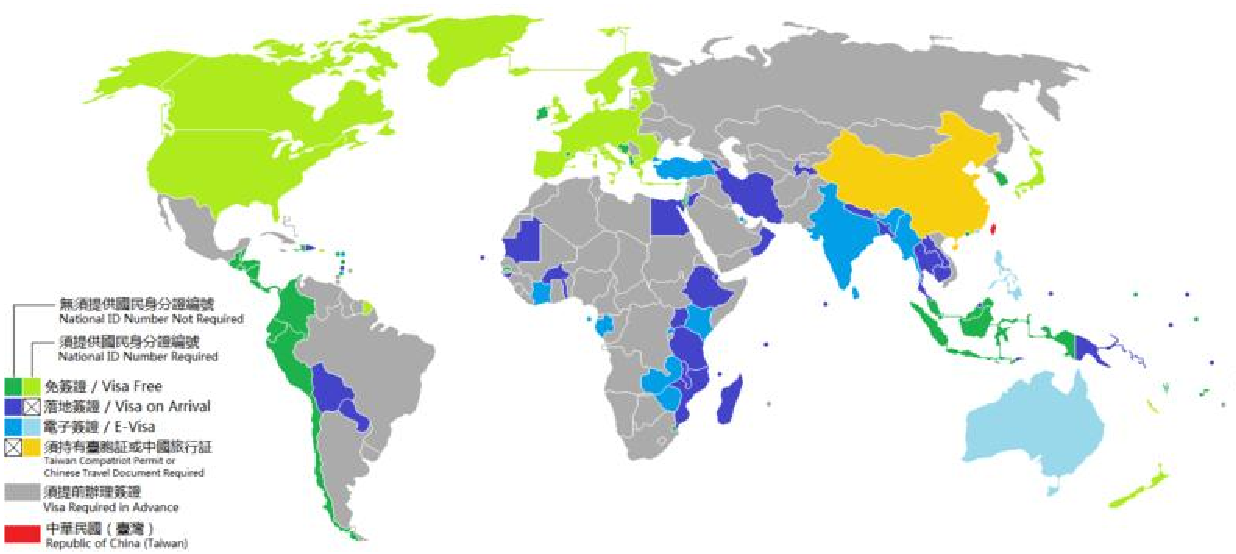
Source:(Wikipedia, 2017b)

4.3.2 Visa requirements for Taiwanese citizens

Visa requirements for Taiwanese passport holders are administrative entry restrictions by the authorities of other states placed on nationals of Republic of China (ROC), commonly known as Taiwan. Although the ROC has only one type of nationality under its nationality law, its nationals' right of abode in Taiwan is based on whether they have established household registration in Taiwan, hence ROC nationals are divided into two categories: nationals with household registration ("NWHRs"), with right of abode in Taiwan; and nationals without household registration ("NWOHRs"), without right of abode in Taiwan. Only NWHRs are entitled to a National Identification Card, and the National ID number is imprinted on the passport's biodata page to signify the holder's status as an NWHR. Holders of such passports can travel to more countries and territories without visas than holders of passports without National ID number, as NWOHRs using ROC passports to enter Taiwan require an entry permit and are subject to immigration controls(Wikipedia, 2017c).

Taiwanese passport is one of the five passports with the most improved rating globally since 2006 in terms of number of countries that its holders may visit without a visa. As of 1th January 2017, nationals of Republic of China with rights of abode in Taiwan had visa-free or visa on arrival access to 134 countries and territories, ranking the ordinary Taiwan passport 31st in terms of travel freedom (tied with Costa Rican and Vatican passports) according to the Henley visa restrictions index. The Taiwanese Ministry of Foreign Affairs, however, listed 164 countries with visa-free or visa on arrival access, which included a large number of countries requiring pre-arrival documentations such as invitations or visa approval letters (such as Kazakhstan, Uzbekistan and Vietnam). Such countries are not considered as providing visa-free or visa-on-arrival access, since the visa is usually approved before arrival and during the process of obtaining such documentations (Figure 11: Visa requirements for Taiwanese citizens). The graph below only lists those countries which provide visa-free or visa on arrival without additional documentations prior to travelling as per international-accepted definitions (Wikipedia, 2017c).

Figure 11: Visa requirements for Taiwanese citizens



Source: (Wikipedia, 2017c)

5 BALKAN REGION

5.1 General data

Not with standing some countries' apprehension to be subscribed under the »Balkan« label, the countries of former Yugoslavia together with few neigbouring countries are frequently lumped together to an entity called »The Balkans«. This is particularly true in the case of Asian tour operaters. Although the region has some common historic traces, the characteristics of destinations, the development of tourism sector as well as the overall infrastructure differ profundly.

For the purpose of this report, it will be used determination »Selected countries of Balkan region« which includes: Albania, Bosnia and Herzegovina, Croatia, Macedonia, Montenegro, Slovenia, Serbia and Kosovo which in general means the countries of former Yugoslavia plus Albania.

By using a few indicators such as large scale privatization, small scale privatization, governance and enterprise restructuring, price liberalization, trade and foreign exchange system and competition policy, in report made by TuTech Innovation GmbH/Hamburg University of Technology (TuTech Innovation GmbH/Hamburg University of Technology, 2017) in purpose for Workshop in Montenegro in 2017, there are several important notes about economic situation in West Balkan (WB) countries.

The country with the highest transition rate is Croatia, followed by Macedonia, Albania, Montenegro, Serbia, Bosnia and Herzegovina and Kosovo.

The highest GDP per capita in 2015 is also in Croatia (USD 11,535), than in Montenegro (USD 6,406), Serbia (USD 5,235), Macedonia (USD 4,852), Bosnia and Herzegovina (USD 4,249), Albania (USD 3,945) and Kosovo (USD 3,561).

Growth rate GDP in 2015 in comparison to 2014, is the highest in Kosovo (3.9 %), than in Macedonia (3.7 %), Montenegro (3.2 %), Bosnia and Herzegovina (3.0 %), Albania (2.8 %), Croatia (1.6 %)

Unemployment rate in these countries is very high in comparison to EU average unemployment rate (10.2 % in 2014). In 2014 the highest unemployment rate is in Kosovo (35.3 %), followed by Bosnia and Herzegovina (27.9 %), Serbia (22.2 %), Montenegro (19.1 %), Croatia (16.7 %) and Albania (16.1 %). The unemployment rate of young people in these countries is much higher (30 – 58 %).

Measuring the social aspect of the development of country (health and lifetime, level of education and standard of living) through the human development index (0 to 1) it is stated the highest value for Croatia, and the lowest value for Albania and Bosnia and Herzegovina. The highest proportion of the population below national poverty line is in Kosovo and Macedonia and the lowest proportion is in Montenegro. Measuring the deviation of income through Gini Index it is stated that it highest unequal distribution of income in Macedonia and the lowest unequal distribution of income in Serbia and Albania.

Foreign direct investment net inflow, in 2015, is the highest in Serbia (USD 2.345.2 million), than in Albania (USD 981.5 million), Montenegro (USD 699.7 million), Kosovo (USD 360.3 million), Bosnia and Herzegovina (USD 267.3 million), Macedonia (USD 192.7 million) and Croatia (USD 159.0 million). The main investors were Austria, Netherland and Greece, mainly investing in industry, trade and communication structures (TuTech Innovation GmbH/Hamburg University of Technology, 2017).

Yugoslavia was the freest of the communist states: while large industry was nationalized, Tito’s system allowed for small businesses to take place. This experience with market economy benefited Yugoslavs when Eastern Europe’s communist regimes eventually fell. And even during the communist era, Yugoslavia remained a popular tourist destination, keeping its standards more in line with the West than the Soviet states (“Understanding Yugoslavia: Why did it break up in the 1990s?,” n.d.).

Slovenia was the first Yugoslav republic to hold free elections, in the spring of 1990. The voters wanted the communists out — and their own independent nation. Along with being the most ethnically homogeneous of the Yugoslav nations, Slovenia was also the most Western-oriented, most prosperous, and a minimum of geographically isolated ("Understanding Yugoslavia: Why did it break up in the 1990s?," n.d.). Border between Slovenia and Italy is renowned as one of the most open borders. On the territory of former Yugoslavia in two following decades, there was the process of establishing the new political reality through civil war and imposing political solutions by the international community, which was ended by the proclamation of independence of Croatia, Bosnia and Herzegovina, Macedonia, Montenegro, Serbia and Kosovo.

Yugoslavia's rich cultural heritage and natural resources had very high tourism potency.

Three years before the collapse in 1991there was recorded record of arrivals with 8,907,000 foreign tourist who passed 52,299,000 night (Gosar, 1989), and in 1985 there were 8,450,000 international arrivals in Yugoslavia (Kobašić, 1987).

In 1989, Yugoslavia achieved total tourism turnover of 20.5 million tourists and 100.3 million overnight stays, out of which 42.4% were made by foreign tourists. That year, Yugoslavia ranked in the top 25 tourist countries (Hristov, 2014). Most foreign tourists go to coastal places (almost two thirds of all tourists); sustainably fewer go to republic and provincial administrative centres, winter sports and mountain resorts, spas, and other tourist areas. In 1985 the following pattern was observed (Gosar, 1989).

In 2016, all countries of former Yugoslavia together[23] recorded 21.154.710 international arrivals (UNWTO, 2017b), but if it is excluded mutual visitation it was realised 17.994.547 arrivals and 94,358,164 overnights (Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of

[23] Slovenia, Croatia, B&H, Serbia, Kosovo, Montenegro, Macedonia.

Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017)
Looking in general in all countries of former Yugoslavia + Albania (Selected countries of Balkan region) it could be stated the positive tourism flows.

One point of view is relation between the number of international arrivals and number of inhabitants and intensity of arrivals per km2.
In next table (Table 11: Selected countries of Balkan region by international tourist arrivals per inhabitant and per km^2 in 2016) are presented data about it.

Table 11: Selected countries of Balkan region by international tourist arrivals per inhabitant and per km^2 in 2016

Country	International arrivals	Population	Area (sq km)	Arrivals per capita	Arrivals per sq km
Croatia	13,809,000	4,170,600	55,960	3.311034	246.765547
Montenegro	1,662,000	622,781	13,450	2.668675	123.568773
Slovenia	3,032,000	2,064,845	20,140	1.468391	150.546177
Albania	4,070,000	2,876,101	27,400	1.415110	148.540146
Macedonia	510,000	2,081,206	25,220	0.245050	20.222046
Bosnia and Herzegovina	777,000	3,516,816	51,200	0.220938	15.175781
Serbia	1,281,000	7,057,412	87,460	0.181511	14.646696
Kosovo	83,710	1,816,200	10,887	0.046091	7.688987

Source: (UNWTO, 2017a; (The World Bank, 2017a); The World Bank, 2017)

It could be seen that in Croatia, Montenegro and Slovenia there are the most tourists per inhabitant and in Croatia, Slovenia and Montenegro there is the highest intensity of tourists per km^2. And in opposite in Kosovo, Serbia and Bosnia and Herzegovina there are the smallest number of tourists per inhabitant and in some countries there is the greatest dispersion of tourists per km2. These data points are by overall intensity of tourism industry and actual problem of sustainability of tourist destinations.

With following data is presented overview of general international tourism flows in countries of West Balkan (Table 12: International tourist arrivalsin selected countries of Balkan region (in millions of tourists).

Table 12: International tourist arrivalsin selected countries of Balkan region (in millions of tourists)

Country	2000	2005	2010	2014	2015	2016
Croatia	6,20	8,50	9,80	11,60	12,68	13,81
Albania	0,32	0,75	2,19	3,34	3,78	4,07
Slovenia	1,10	1,60	1,90	2,41	2,70	3,03
Montenegro	0,07	0,70	1,09	1,35	1,56	1,66
Serbia	0,24	0,73	0,68	1,03	1,13	1,28
B&H	0,17	0,21	0,39	0,54	0,68	0,77
Macedonia	0,22	0,20	0,26	0,42	0,49	0,51
Kosovo			0,03	0,06	0,08	0,08

Source: (UNWTO, 2017c)

Not suprisingly, Croatia is the leading destination in the region according to the number of tourists as well as income generated by tourism (Table 13: International tourism receipts in selected countries of Balkan region (in billion USD). It is followed by other countries with access to the Adriatic sea: Albania, Slovenia and Montenegro. However, in comparison to Croatiathese countries have substantially less tourist arrivals and more modest income from tourism. These are followed by landlocked countries of Serbia, B&H, Macedonia and Kosovo. Although the access to the sea and coastal tourism still plays an important role in the destination attractivness in this area, countries without access to the sea (e.g. Serbia) are catching up fast.

Table 13: International tourism receipts in selected countries of Balkan region (in billion USD)[24]

Country	2000	2005	2010	2014	2015	2016
Croatia	2,80	7,50	7,60	9,87	8,83	9,63
Slovenia	1,00	1,80	2,60	2,73	2,32	2,42
Albania			1,62	1,70	1,50	1,69
Serbia	0,03	0,31	0,80	1,14	1,04	1,15
Montenegro		0,27	0,73	0,91	0,90	0,95
B&H	0,23	0,53	0,59	0,71	0,66	0,72
Macedonia	0,04	0,09	0,19	0,29	0,27	0,28

Source: (UNWTO, 2017c)

According to achieved international tourism receipts the highest value in 2016 is recorded in Croatia, Slovenia and Albania, but looking at receipt per arrival the highest ratio is in Bosnia and Herzegovina (US$ 935.06), Montenegro (US$ 742.19), Croatia (US$ 697.32) and Serbia (US$ 692.77); and the smallest rate is realized in Macedonia (US$ 549.02), Albania (US$ 557.76) and Slovenia (US$ 594.599. All countries record growth in receipts through the observed period which is in line with arrivals. In general economic context it is interesting to note that the highest international tourism receipts per capita is realized in Montenegro (US$ 3,885.80), Croatia (US$ 2,309.02) and Slovenia (US$ 818.46) and the lowest receipts is achieved in Serbia (US$ 39.67), Bosnia and Herzegovina (US$ 204.73) and Albania (US$ 399.85). In Macedonia is realized US$ 456.47 international tourism receipts per capita in 2016. This economical context could point to the level of impact of the tourism industry in those societies.

[24] There is no data for Kosovo

5.2 Chinese tourists in overall international tourism flows in selected countries of Balkan region

In the next few subchapters the share of Chinese outbound tourism in overall international tourism flows in selected countries of Balkan will be presented, with some differences in the period of observation due to lack of data in some countries. Also, the growth index will be presented with purpose to point the direction and intensity in the change of Chinese tourism flows. In some countries, there will be presented the dispersion of arrivals on monthly bases, as one of the indicators of Chinese tourist's behavior in concerning the preferable period of going on holiday.

5.2.1 Albania

In Albania (Table 14: Number of arrivals and accommodations of foreign tourists in Albania between 2000 and 2016), there was a period of very close political relationship with China, during the Enver Hoxha era (former leader of Albanian Communist Party) which had some implications also on present Chinese tourism flows.

Table 14: Number of arrivals and accommodations of foreign tourists in Albania between 2000 and 2016

		Foreign tourists	Chinese tourists	China's tourists share	Chinese tourists base index 2003	Chinese tourists base share index 2003	Foreign tourist length of stay	Chinese tourists length of stay
2000	Arrivals	317,149	379				3.06	
	Accommodations	971,269						
2001	Arrivals	354,000	331				2.71	
	Accommodations	957,882						
2002	Arrivals	470,574	688				3.97	
	Accommodations	1,869,225						
2003	Arrivals	558,057	562				1.93	
	Accommodations	1,079,520						
2004	Arrivals	645,409	1,189				2.65	
	Accommodations	1,708,436						
2005	Arrivals	747,837	1,233	0.165%		1.00	2.28	1.70
	Accommodations	1,705,593	2,096	0.123%		1.00		
2006	Arrivals	937,038	1,005	0.107%	0.82	0.65	2.16	1.70
	Accommodations	2,022,812	1,709	0.084%	0.82	0.69		
2007	Arrivals	1,126,514	880	0.078%	0.71	0.47	2.57	1.70
	Accommodations	2,891,946	1,496	0.052%	0.71	0.42		
2008	Arrivals	1,419,191	1,267	0.089%	1.03	0.54	2.32	1.70
	Accommodations	3,294,551	2,154	0.065%	1.03	0.53		
2009	Arrivals	1.855.634	1.347	0..073%	1.09	0.44	2.62	1.70
	Accommodations	4.853.197	2.290	0.047%	1.09	0.38		
2010	Arrivals	2,417,337	1,718	0.071%	1.39	0.43	2.50	1.70
	Accommodations	6,043,343	2,921	0.048%	1.39	0.39		
2011	Arrivals	2,932,132	1,967	0.067%	1.60	0.41	2.62	1.70
	Accommodations	7,675,287	3,344	0.044%	1.60	0.35		
2012	Arrivals	3,513,666	3,129	0.089%	2.54	0.54	2.35	1.70
	Accommodations	8,268,827	5,319	0.064%	2.54	0.52		
2013	Arrivals	3,255,988	3,961	0.122%	3.21	0.74	1.82	1.51
	Accommodations	5,932,521	6,000	0.101%	2.86	0.82		
2014	Arrivals	3,672,591	3,882	0.106%	3.15	0.64	1.61	1.67
	Accommodations	5,930,892	6,500	0.110%	3.10	0.89		
2015	Arrivals	4,131,242	4,307	0.104%	3.49	0.63	1.88	1.63
	Accommodations	7,766,735	7,000	0.090%	3.34	0.73		
2016	Arrivals	4,735,511	4,800	0.101%	3.89	0.61	1.80	1.58
	Accommodations	8,523,920	7,600	0.089%	3.63	0.73		

Source: (Republic of Albania Instat The Institute of Statistics, 2017)

In 2015 and 2016 it was recorded 4,307 and 4,800 arrivals and 7,000 and 7,600 overnights of Chinese travelers in Albania which is almost the smallest number of arrivals and overnight comparing to other observed countries. This is only 1.46-1.55 % of total arrivals and 1.72-1.71 % of total overnights, regardless previous statement about the long-term relationship between Albania and China.

The share of Chinese tourists in overall international tourism flow is among 0.045 % to 0,165 % through observed period, but the index of growth is above 3 points. This point is about the number of Chinese arrivals that will be in rise in future but still as very small market segment. Length of staying of Chinese tourists is smaller than 2 days (from 1.58 to 1.70) which is less than a length of staying of foreign tourists in total (from 1.61 to 2.65) except in 2000 (3.06 days) and 2002 (3.95 days). In both cases, the length of staying has been reducing from 2000 to 2016. The length of staying could, in general, indicate the main purposes of visiting in sense that longer staying inclines to holiday and shorter to business reasons which are in case of Albania may have meant that business trips or short visits to other destinations are prevailing.

5.2.2 Bosnia and Herzegovina

In Bosnia and Herzegovina (Table 15: Number of arrivals and accommodations of foreign tourists in B&H between 2003 and 2016), it was recorded 9,948 and 13,266 arrivals and 12,779 and 16,592 overnights of Chinese travelers in 2015 and 2016 which is 3.38-4.29 % of total arrivals and 3.15-3.74 % of total overnights and that is lower share than most other observed countries.

Table 15: Number of arrivals and accommodations of foreign tourists in B&H between 2003 and 2016

		Foreign tourists	Chinese tourists	China's tourists share	Chinese tourists base index 2003	Foreign tourist length of stay	Chinese tourists length of stay
2003	Arrivals	169,860	315	0.185%		2.46	1.51
	Accommodations	417,574	477	0.114%			
2004	Arrivals	194,425	277	0.142%	0.88	2.45	1.64
	Accommodations	476,230	454	0.095%	0.95		
2005	Arrivals	217,273	281	0.129%	0.89	2.23	2.51
	Accommodations	484,545	706	0.146%	1.48		
2006	Arrivals	255,764	182	0.071%	0.58	2.32	2.13
	Accommodations	594,380	387	0.065%	0.81		
2007	Arrivals	306,452	497	0.162%	1.58	2.27	2.04
	Accommodations	694,507	1,015	0.146%	2.13		
2008	Arrivals	321,511	534	0.166%	1.70	2.24	2.48
	Accommodations	718,750	1,322	0.184%	2.77		
2009	Arrivals	310,942	478	0.154%	1.52	2.16	1.95
	Accommodations	671,128	934	0.139%	1.96		
2010	Arrivals	365,454	770	0.211%	2.44	2.11	1.63
	Accommodations	772,754	1,255	0.162%	2.63		
2011	Arrivals	391,945	2,244	0.573%	7.12	2.13	1.73
	Accommodations	836,005	3,874	0.463%	8.12		
2012	Arrivals	438,585	3,369	0.768%	10.70	2.12	1.45
	Accommodations	931,081	4,880	0.524%	10.23		
2013	Arrivals	528,579	5,642	1.067%	17.91	2.10	1.26
	Accommodations	1,108,905	7,121	0.642%	14.93		
2014	Arrivals	536,354	6,549	1.221%	20.79	2.03	1.46
	Accommodations	1,088,472	9,573	0.879%	20.07		
2015	Arrivals	678,271	9,948	1.467%	31.58	2.10	1.28
	Accommodations	1,425,761	12,779	0.896%	26.79		
2016	Arrivals	776,889	13,266	1.708%	42.11	2.11	1.25
	Accommodations	1,641,421	16,592	1.011%	34.78		

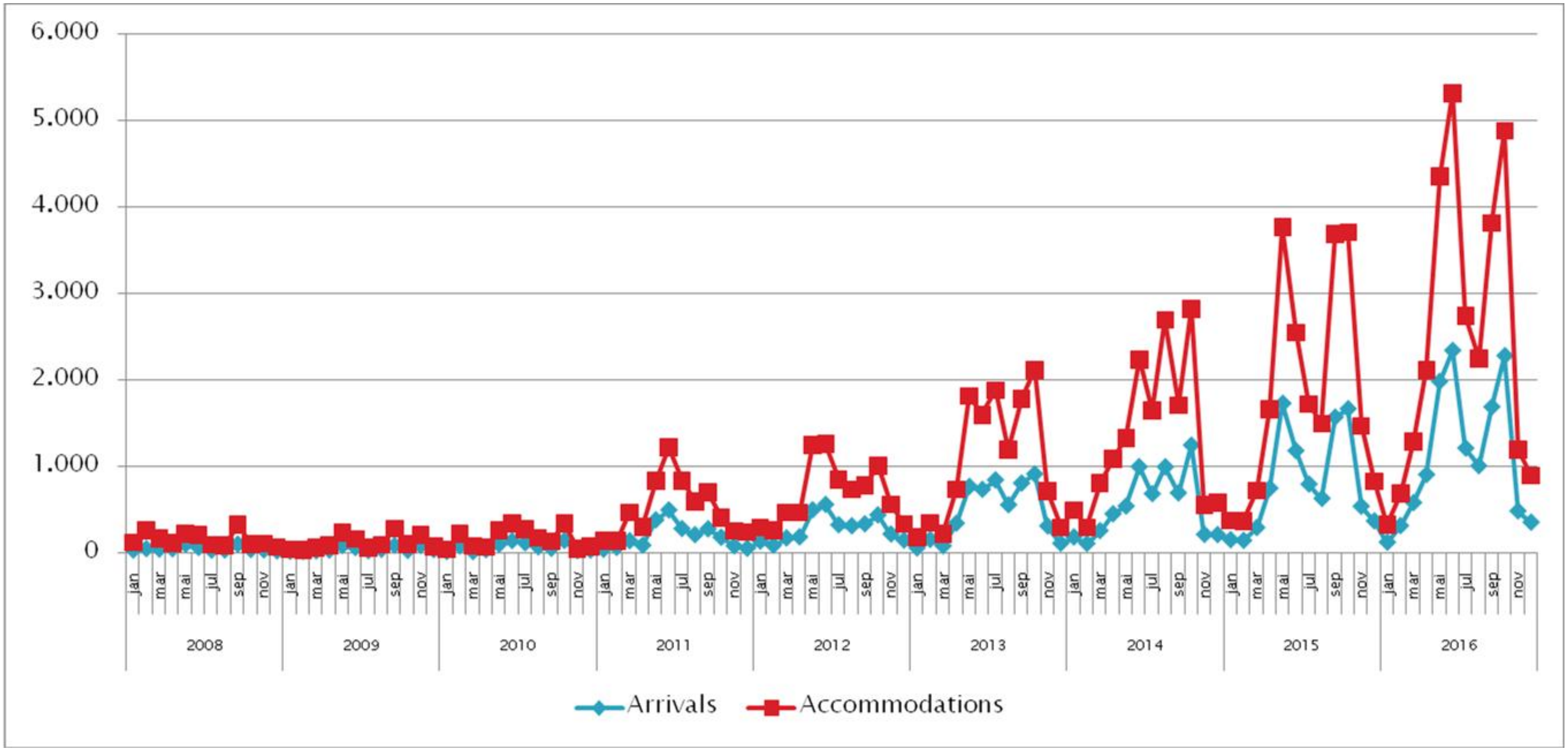
Source: (Agencija za statistiku Bosne i Hercegovine, 2017)

Chinese tourists took part in overall international arrivals and accommodations in the range from 0.065 % to 1.71 %, in period 2003-2016, which is rather high according to other observed countries. Index of growth is enormously high, 34, 78 points in 2016 in relation to the base year 2003, the highest in comparison to other selected countries of Balkan region. This sign on the very strong position of Chinese market segment in future.

In observed period Chinese tourist realized the length of staying 1.25 days in minimum and 2.48 in maximum which is less than a length of staying of foreign tourists in total (2.03 days in minimum and 2.46 days in maximum).The length of staying is slightly higher than in Albania but lower than in other observed countries an in both cases, the length of staying have been reducing from 2000 to 2016.

During the period from 2008 to 2016 it could be observed that in general the most visited month per year are May (2009, 2015), June (2012, 2016), September (2008, 2011), October (2010, 2013, 2014) and November (2009) with almost same number of arrivals as in most visited month in June (2010), July (2011). This monthly dispersion of arrivals points on that the summer season and postseason are an important period for visitation during the year (Figure 12: The distribution of Chinese tourists in B&H according to a month of arrival between 2008 and 2016).

Figure 12: The distribution of Chinese tourists in B&H according to a month of arrival between 2008 and 2016



Source: (Agencija za statistiku Bosne i Hercegovine, 2017)

5.2.3 Croatia

The data regarding Chinese tourist flows in Croatia (Table 16: Number of arrivals and accommodations of foreign tourists in Croatia between 2005 and 2016) is structured by resident destination such as Mainland China, SAR Hong Kong, SAR Macao and Taiwan which is consistent with UNWTO data evidence and this data presentation is done only in case of Croatia[25].

In Croatia in 2015 and 2016, it was recorded 208,104 and 209,603 arrivals and 271,141 and 285,701 overnights of Chinese travelers which is the largest number of arrivals and overnight comparing to other observed countries. This is 70.66-67.81 % of total arrivals and 66.74-64.44 % of total overnights, which is dominant share regarding total Chinese incoming.

Chinese tourists take a part in overall international tourism flow, with 0.069 % to 1, 52 % in the observed period, realizing the index of growth at 15.9 points. This very high index points that the number of Chinese arrivals will be very higher in future, but as in other observed countries, it is still small market segment. Chinese tourists stay less than 2 days (in the range from 1.30 to 1.89 days) except in 2007 (2.39 days) and 2009 (2.09 days) which is much less than a length of staying of foreign tourists in general (in the range from 5.66 to 5.19 days). Although in both cases, the length of staying have been reducing in the observed period it could notice that there is smaller variation in case of foreign tourists in general. This could indicate that Chinese tourists prefer shorter holidays in Croatia than other foreign tourists due to combining arrangement of visitation two or more destinations.

[25]This was possible due to that kind of evidence in Statistical Office of the Republic of Croatia.

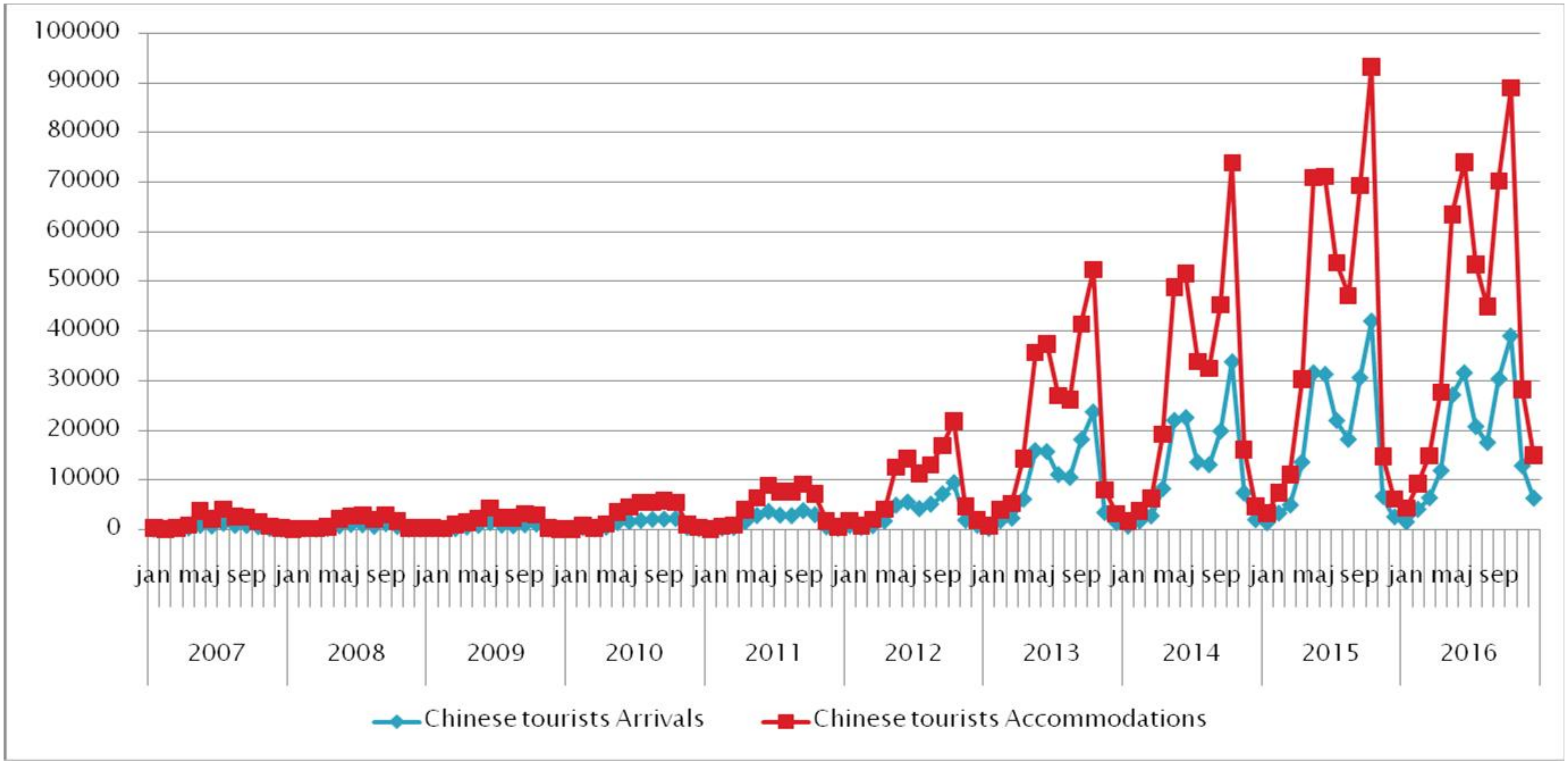
In next few figures (Figure 13: The distribution of all Chinese tourists in Croatia according to a month of arrival between 2007 and 2016; Figure 14: The distribution of all Chinese tourists from PRC in Croatia according to a month of arrival between 2007 and 2016; Figure 15: The distribution of all Chinese tourists from Hong Kong in Croatia according to a month of arrival between 2013 and 2016; Figure 16: The distribution of all Chinese tourists from Taiwan in Croatia according to a month of arrival between 2013 and 2016; Figure 17: The distribution of all Chinese tourists from Macao in Croatia according to a month of arrival between 2007 and 2016) are presented the distribution of Chinese travelers in Croatia by month of arrival.

Table 16: Number of arrivals and accommodations of foreign tourists in Croatia between 2005 and 2016

		Foreign tourists	PRC tourists	Hong Kong tourists	Macao tourists	Taiwan tourists	Chinese tourists	China's tourists share	Chinese tourists base in. 2007	Foreign tourist length of stay	PRC tourists length of stay	Hong Kong tourists length of stay	Macao tourists length of stay	Taiwan tourists length of stay	Chinese tourists length of stay
2005	Arrivals	8,466,886								5.43					
	Accommodations	45,986,517													
2006	Arrivals	8,658,876								5.43					
	Accommodations	47,021,944													
2007	Arrivals	9,306,691	6,416				6,416	0.069%		5.33	2.39				2.39
	Accommodations	49,574,630	15,365				15,365	0.031%							
2008	Arrivals	9,415,105	6,375				6,375	0.068%	0.99	5.38	1.89				1.89
	Accommodations	50,625,522	12,018				12,018	0.024%	0.78						
2009	Arrivals	8,693,796	7,534				7,534	0.087%	1.17	5.66	2.05				2.05
	Accommodations	49,229,508	15,479				15,479	0.031%	1.01						
2010	Arrivals	9,110,742	15,479				15,479	0.170%	2.41	5.60	1.50				1.50
	Accommodations	50,992,321	23,143				23,143	0.045%	1.51						
2011	Arrivals	9,926,674	22,459				22,459	0.226%	3.50	5.52	1.54				1.54
	Accommodations	54,751,305	34,578				34,578	0.063%	2.25						
2012	Arrivals	10,369,226	43,249				43,249	0.417%	6.74	5.55	1.48				1.48
	Accommodations	57,522,137	64,092				64,092	0.111%	4.17						
2013	Arrivals	10,948,366	41,973	13,491	149	55,841	111,454	1.018%	6.54	5.45	1.50	1.29	1.92	1.18	1.31
	Accommodations	59,679,630	63,066	17,379	286	65,670	146,401	0.245%	4.10						
2014	Arrivals	11,622,961	61,215	14,449	186	72,187	148,037	1.274%	9.54	5.28	1.46	1.28	1.87	1.15	1.29
	Accommodations	61,323,572	89,462	18,482	347	83,178	191,469	0.312%	5.82						
2015	Arrivals	12,683,179	87,884	23,507	365	96,348	208,104	1.641%	13.70	5.19	1.48	1.21	2.01	1.17	1.30
	Accommodations	65,862,680	129,700	28,384	732	112,325	271,141	0.412%	8.44						
2016	Arrivals	13,808,532	102,044	23,693	328	83,538	209,603	1.518%	15.90	5.23	1.51	1.33	1.58	1.19	1.36
	Accommodations	72,193,352	154,391	31,570	518	99,222	285,701	0.396%	10.05						

Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

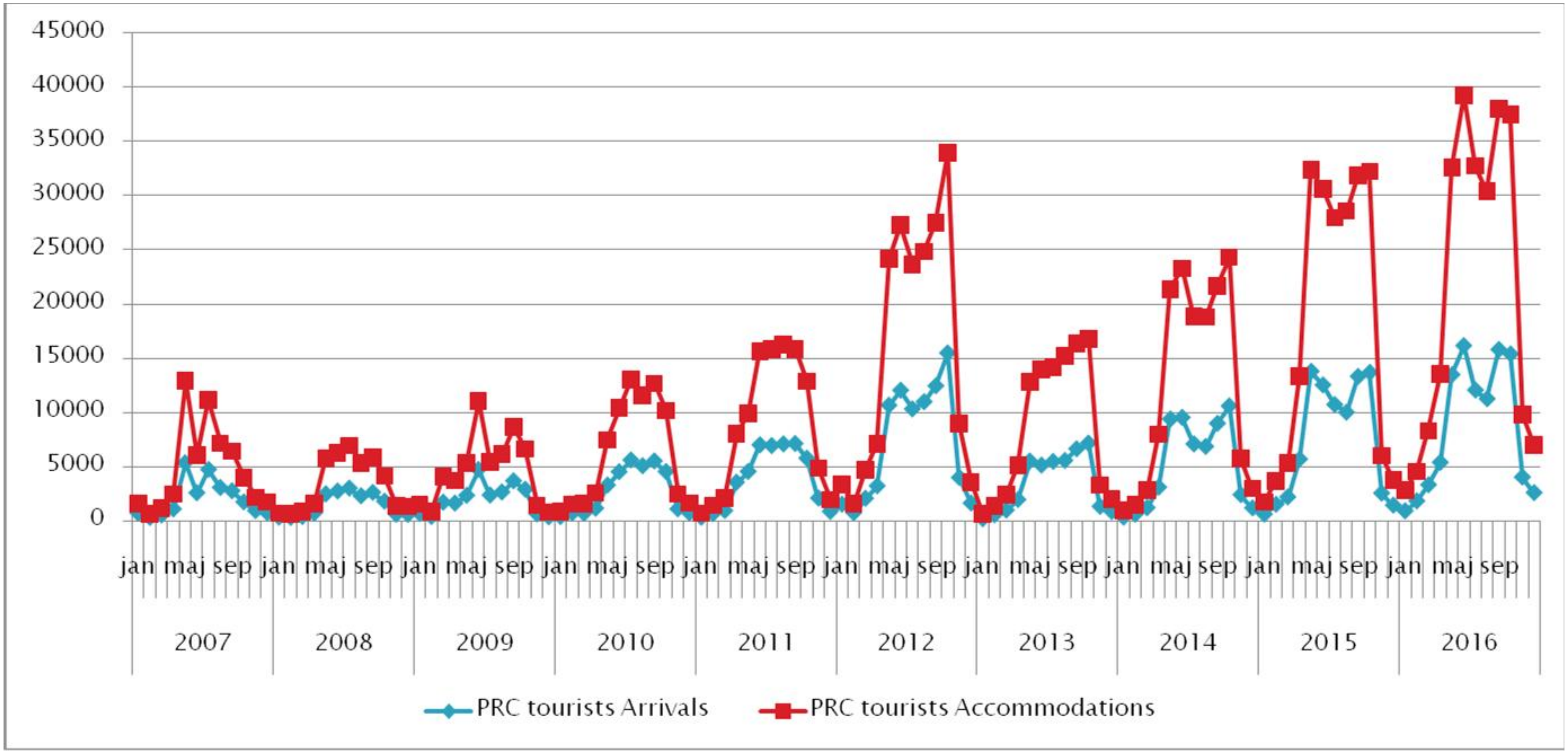
Figure 13: The distribution of all Chinese tourists in Croatia according to a month of arrival between 2007 and 2016



Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

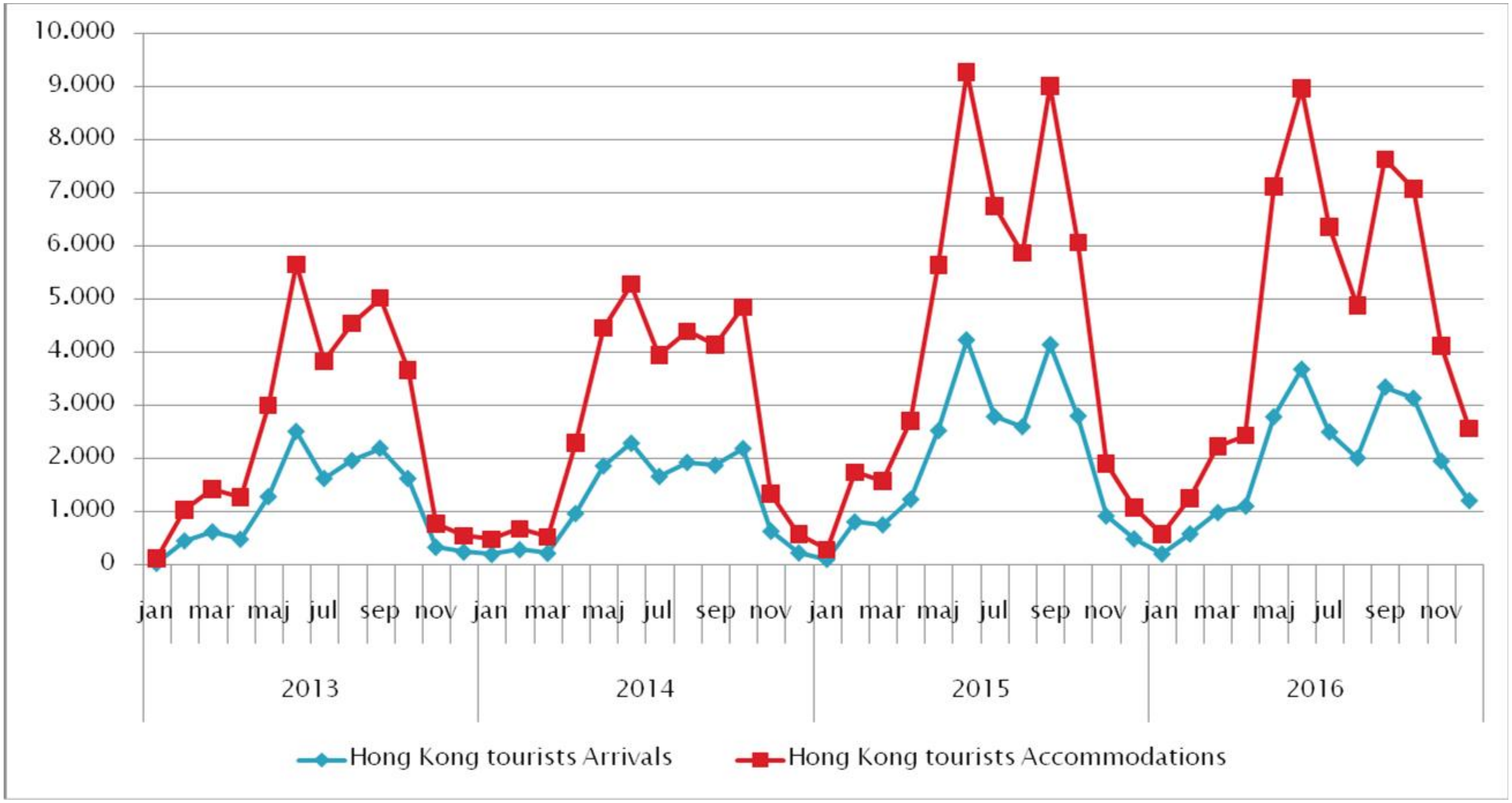
Chinese tourists visit Croatia in largest number in May (2015), June (2009, 2016), July (2007), August (2011), September (2008), October (2010, 2012, 2013, 2014). The most preferred month is October which is in four years in the observed period the most visited month. It is clear that holiday season and postseason are an important period in a year for visiting Croatia and that is partly in accordance with Chinese travel behavior (Resonance Consultancy Ltd., 2016) concerning July, September and October.

Figure 14: The distribution of all Chinese tourists from PRC in Croatia according to a month of arrival between 2007 and 2016



Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

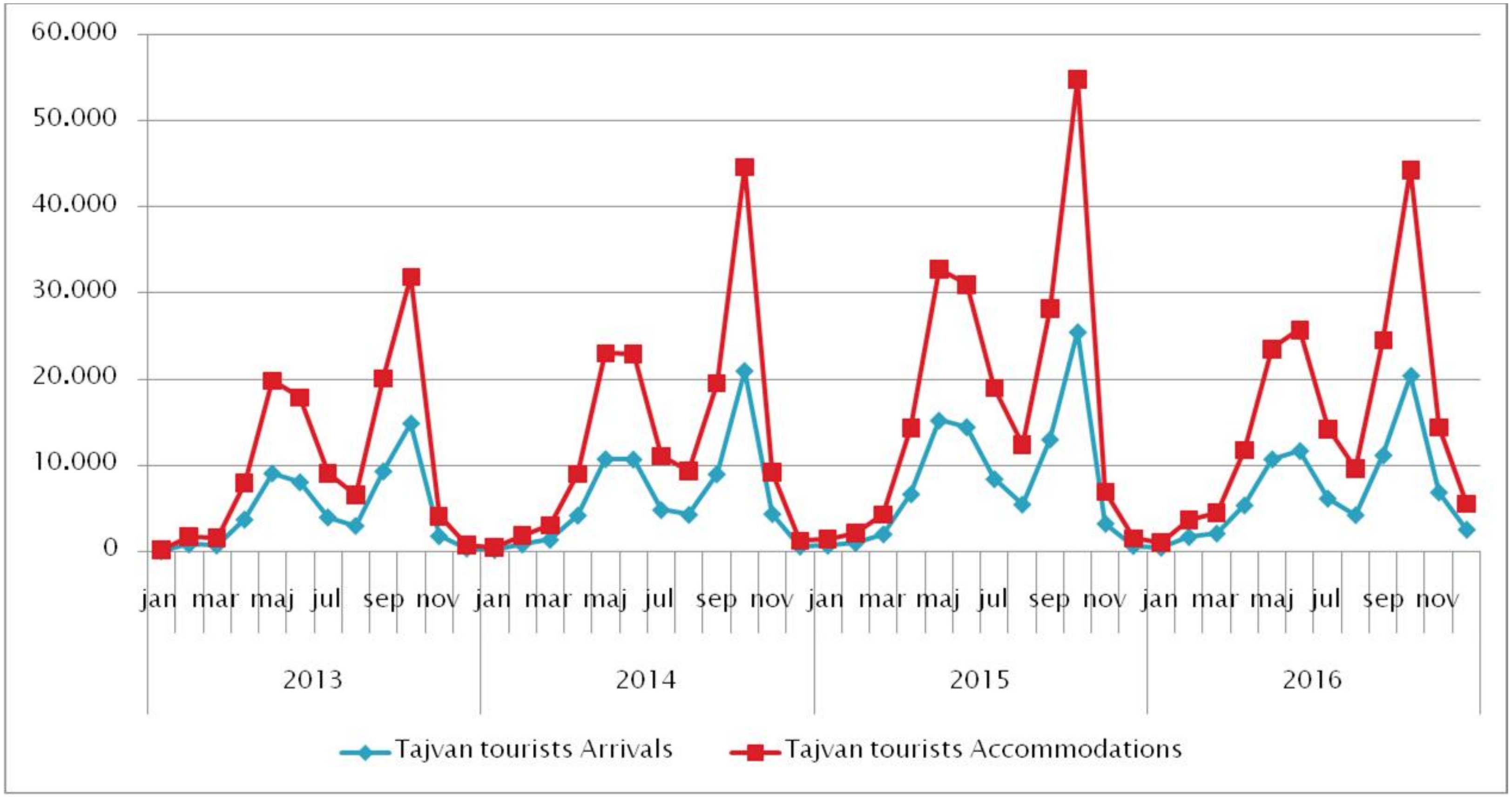
Figure 15: The distribution of all Chinese tourists from Hong Kong in Croatia according to a month of arrival between 2013 and 2016



Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

Hong Kong tourist the most prefer to come in Croatia in June (2014, 2015, 2016) and in September (2013).

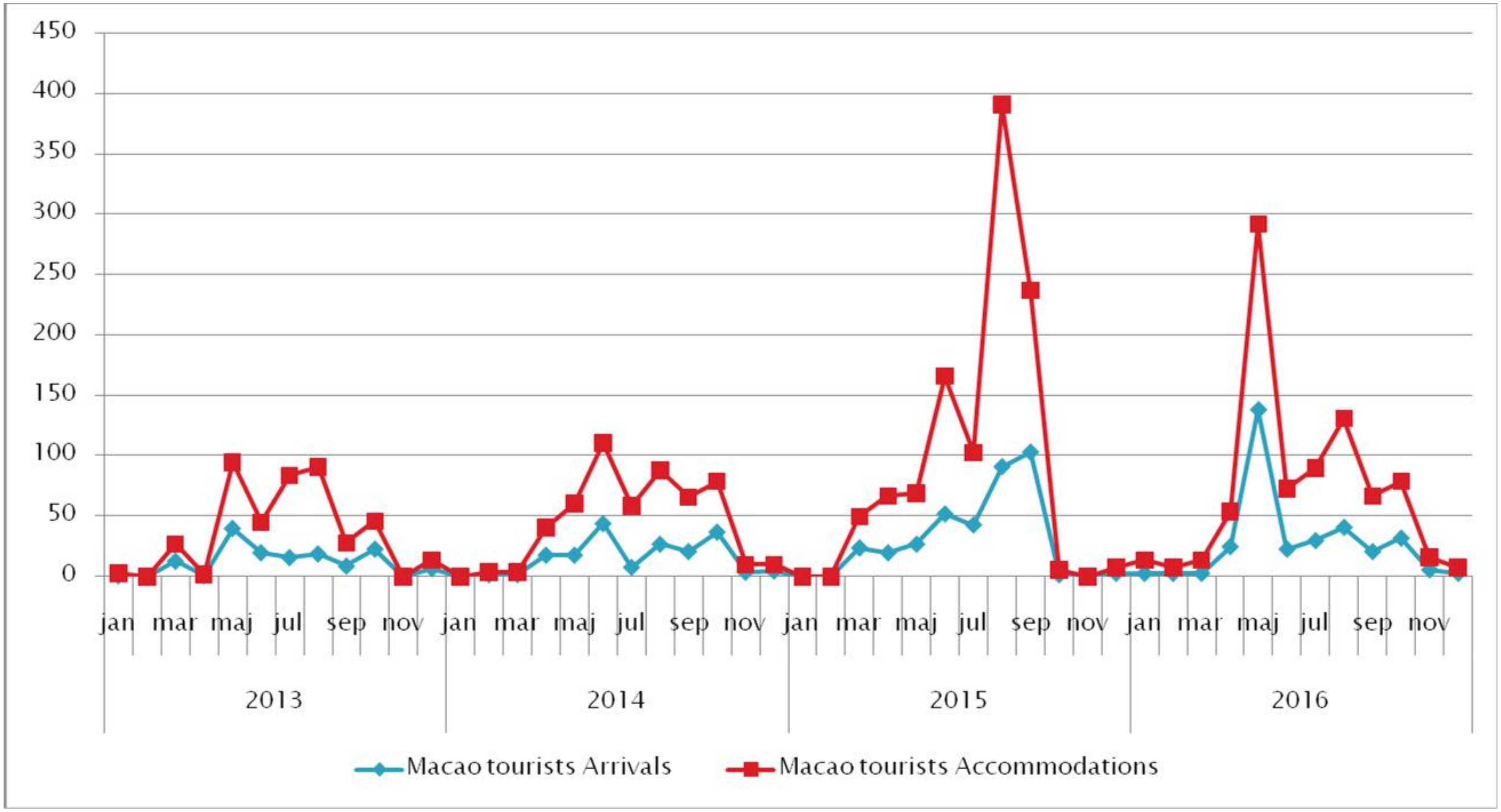
Figure 16: The distribution of all Chinese tourists from Taiwan in Croatia according to a month of arrival between 2013 and 2016



Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

Concerning Taiwan tourists, the preferable month is October in all observed period.

Figure 17: The distribution of all Chinese tourists from Macao in Croatia according to a month of arrival between 2007 and 2016



Source: (Republika Hrvatska Državni zavod za statistiku, 2017)

Macao tourists come in the largest number in Croatia in May (2013, 2016), June (2014) and September (2015).

5.2.4 Macedonia

Chinese tourists in Macedonia have realized 7,256 and 6,565 arrivals and 10,656 and 9,814 overnights in 2015 and 2016 (Table 17: Number of arrivals and accommodations of foreign tourists in Macedonia between 2010 and 2016).

Looking at the total Chinese incoming this is 2.46-2.12 % of arrivals and 2.62-2.21 % of overnights, which is lower than in Bosnia and Herzegovina but higher than in Albania.

Concerning overall international arrivals and accommodations the share of Chinese tourists vary in the range from 0.269 % to 1.286 % for arrivals, and in the range from 0.287 % to 0.931 % for overnight in observed period. Index of growth is 9.33 points in 2016 regarding the base year 2003 which indicate the very good position of Chinese market segment in future.

Chinese tourist realized, in observed period, the length of staying 1.47 days in minimum and 2.42 in maximum which is less than a length of staying of foreign tourists in total (2.03 days in minimum and 2.31 days in maximum). The length of staying is higher than in Albania and Croatia but slightly lower than in Bosnia and Herzegovina. As in other observed countries, the length of staying regarding Chinese and foreign tourists in general, have been reducing from 2000 to 2016.

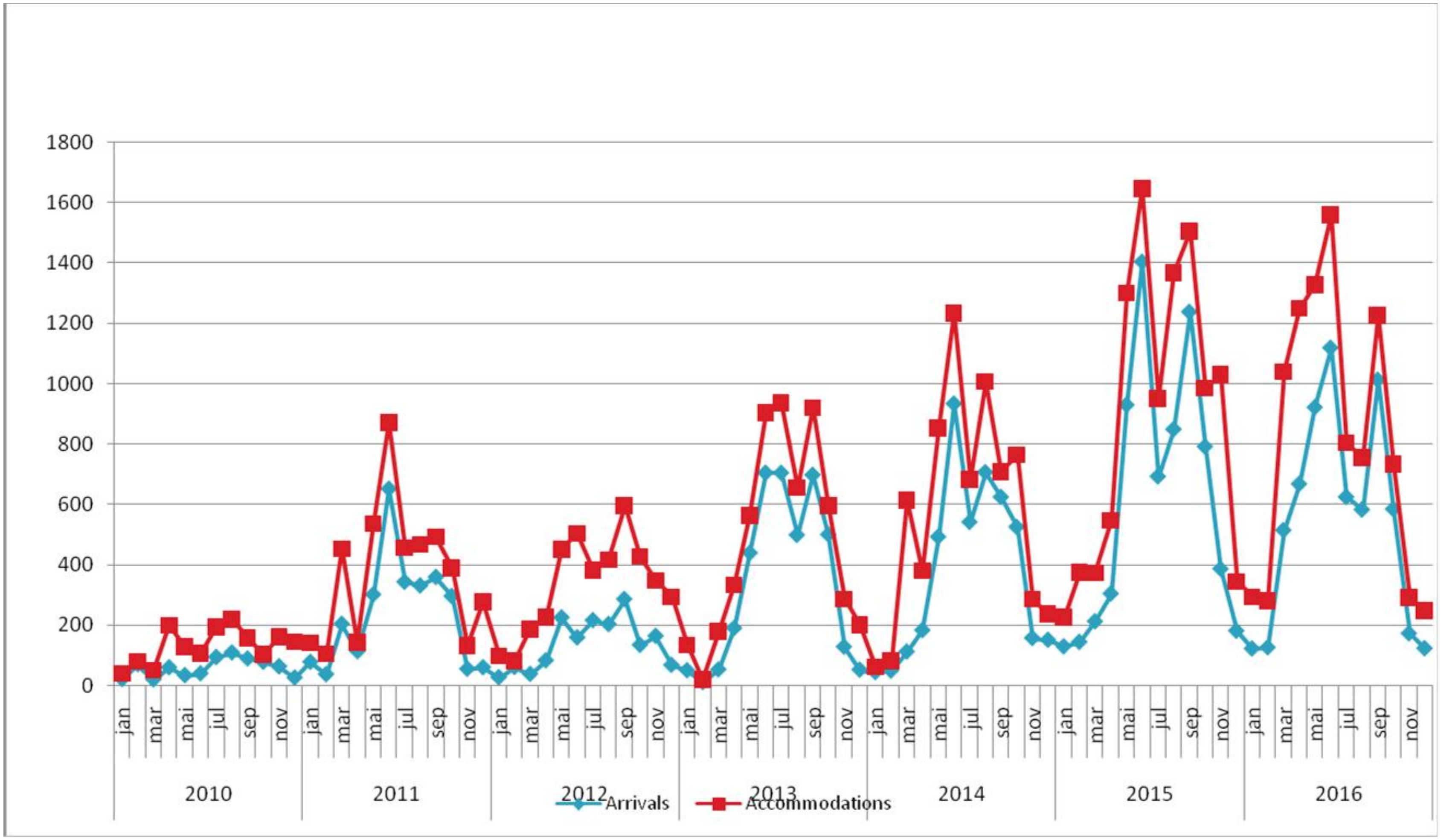
Table 17: Number of arrivals and accommodations of foreign tourists in Macedonia between 2010 and 2016

		Foreign tourists	Chinese tourists	China's tourists share	Chinese tourists base index 2010	Chinese tourists base share index 2010	Foreign tourist length of stay	Chinese tourists length of stay
2005	Arrivals	197,216					2.25	
	Accommodations	442,988						
2006	Arrivals	202,357					2.19	
	Accommodations	442,845						
2007	Arrivals	230,080					2.25	
	Accommodations	518,088						
2008	Arrivals	254,957					2.30	
	Accommodations	587,447						
2009	Arrivals	259,204					2.25	
	Accommodations	583,796						
2010	Arrivals	261,696	704	0.269%	1.00	1.00	2.14	2.28
	Accommodations	559,032	1602	0.287%	1.00	1.00		
2011	Arrivals	327,471	1,664	0.508%	2.36	1.89	2.31	2.42
	Accommodations	755,166	4,027	0.533%	2.51	1.86		
2012	Arrivals	351,359	2,828	0.805%	4.02	2.99	2.31	1.58
	Accommodations	811,746	4,478	0.552%	2.80	1.93		
2013	Arrivals	399,684	4,026	1.007%	5.72	3.74	2.03	1.43
	Accommodations	811,376	5,744	0.708%	3.59	2.47		
2014	Arrivals	425,314	4,517	1.062%	6.42	3.95	2.17	1.53
	Accommodations	922,513	6,919	0.750%	4.32	2.62		
2015	Arrivals	485,530	7,256	1.494%	10.31	5.56	2.13	1.47
	Accommodations	1,036,383	10,656	1.028%	6.65	3.59		
2016	Arrivals	510,484	6,565	1.286%	9.33	4.78	2.06	1.49
	Accommodations	1,054,017	9,814	0.931%	6.13	3.25		

Source: (Republic of Macedonia State Statistical Office, 2017)

The most popular months for visiting Macedonia by Chinese tourists are June (2012, 2013, 2014, 2015, 2016), July (2013), August (2010) and September (2011) which points on summer season as important period for visitation (Figure 18: The distribution of Chinese tourists in Macedonia according to a month of arrival between 2010 and 2016).

Figure 18: The distribution of Chinese tourists in Macedonia according to a month of arrival between 2010 and 2016



Source: (Republic of Macedonia State Statistical Office, 2017)

5.2.5 Montenegro

The data (Table 18: Chinese tourists' arrivals and accommodations in Montenegro in 2014 and 2016) regarding Chinese tourists in Montenegro has been collected by Statistical Office of Montenegro (MONSTAT) since 2014, which means that in observation could be included data from a few years (2014, 2015 and 2016).

Table 18: Chinese tourists' arrivals and accommodations in Montenegro in 2014 and 2016

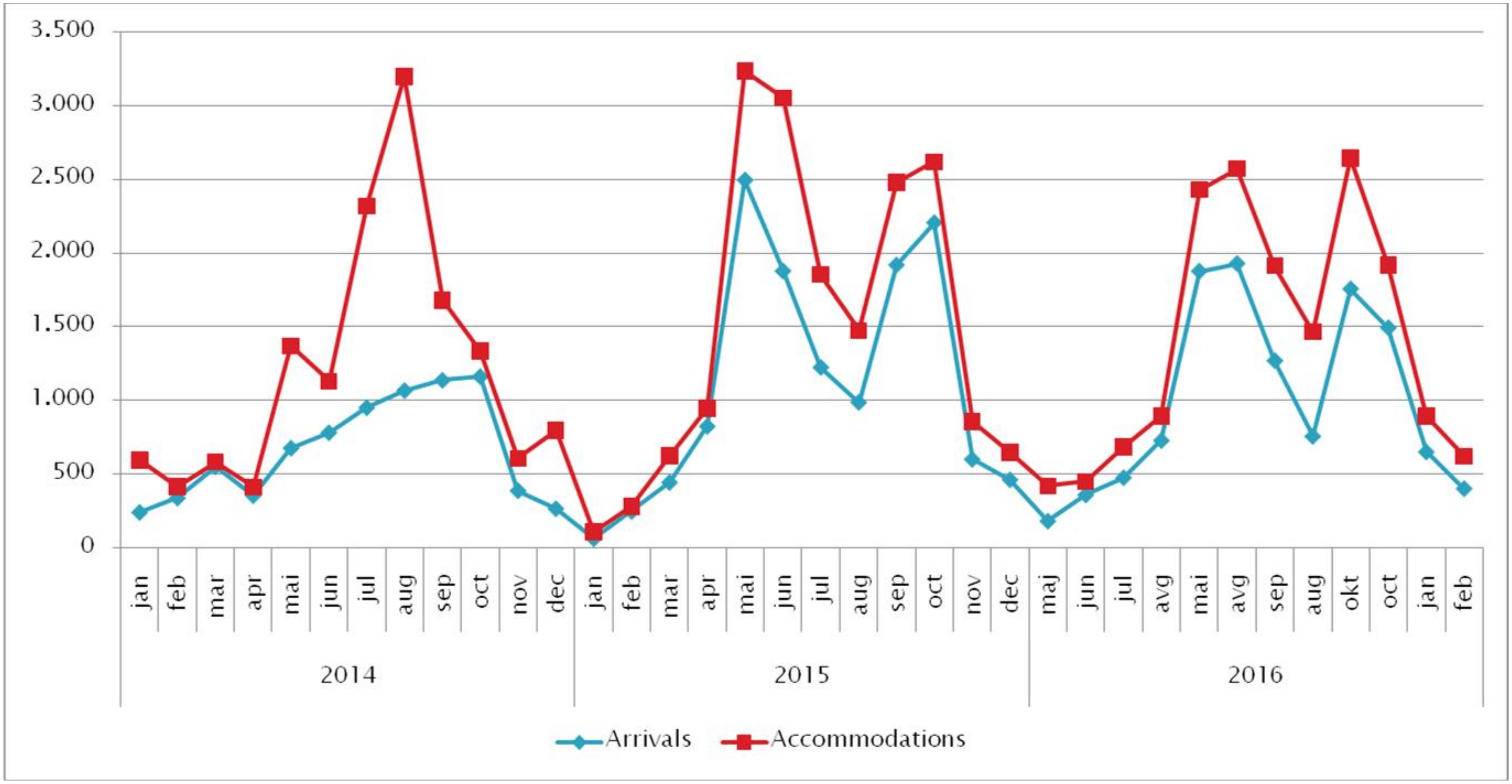
		Foreign tourist	Chinese tourists	Chinese tourists' share	Chinese tourists base index 2014	Chinese tourists base share index 2014	Foreign tourists' length of stay	Chinese tourists' length of stay
	Arrivals	797,071					6.31	
2006	Accommodations	5,026,663						
	Arrivals	984,138					6.55	
2007	Accommodations	6,443,485						
	Arrivals	1,031,212					6.76	
2008	Accommodations	6,966,279						
	Arrivals	1,044.014					6.41	
2009	Accommodations	6,695,674						
	Arrivals	1,087,794					6.41	
2010	Accommodations	6,977,860						
	Arrivals	1,201,099					6.51	
2011	Accommodations	7,818,803						
	Arrivals	1,264,163					6.44	
2012	Accommodations	8,143,007						
	Arrivals	1,324,403					6.35	
2013	Accommodations	8,414,215						
	Arrivals	1,350,297	7,932	0.59%			6.37	1.82
2014	Accommodations	8,596,656	14,432	0.17%				
	Arrivals	1,559,924	13,362	0.86%	1.68	1.46	6.61	1.36
2015	Accommodations	10,307,371	18,170	0.18%	1.26	1.05		
	Arrivals	1,662,121	11,894	0.72%	0.89	0.84	6.33	1.42
2016	Accommodations	10,528,475	16,901	0.16%	0.93	0.91		

Source: (Zavod za statistiku Crne Gore Monstat, 2017)

In Montenegro during 2015 and 2016 arrived 13,362 and 11,894 Chinese tourists who realized 18,170 and 16, 901 overnights which present 4.54-3.85 % of total arrivals and 4.47-3.81 % of total overnights in observed countries. This is more Chinese tourists than in Albania, Bosnia and Herzegovina and Macedonia and less in other observed countries.
Looking at the overall international tourism flow, it could be noticed the share of Chinese tourists in arrivals in the range from 0.59 % to 0.72 % and in overnights in the range from 0.17 % to 0.16 % in the observed period. Index of growth in arrivals in 2016 is 0.89 which presents the lowest parameter concerning the other countries. This index has to be understood in the context of length of the period of observation. In Montenegro, Chinese tourists stay less than 2 days (in the range from 1.36 to 1.82 days) which is, as similar in Croatia, much less than a length of staying of foreign tourists in general (in the range from 6.31 to 6.76 days). The length of staying has been reducing in the observed period in both cases which is same in all observed countries. The great difference in length of staying among Chinese and foreign tourists in general, sign on same observation, such as in Croatia, that Chinese probably use combining arrangement of visitation two or more destinations.

The most of Chinese tourists visited Montenegro in May (2015), June (2016) and October (2014) that is in line with other observed countries (Figure 19: The distribution of Chinese tourists in Montenegro according to a month of arrival between 2014 and 2016).

Figure 19: The distribution of Chinese tourists in Montenegro according to a month of arrival between 2014 and 2016



Source: (Zavod za statistiku Crne Gore Monstat, 2017)

5.2.6 Kosovo

The number of Chinese arrivals and overnights in Kosovo is estimated[26] in observed period, due to lack of data. Statistical office of Kosovo collected information regarding Chinese tourists under category “other” (Table 19: Number of arrivals and accommodations of foreign tourists in Kosovo between 2010 and 2016).

Table 19: Number of arrivals and accommodations of foreign tourists in Kosovo between 2010 and 2016

		Foreign tourists	Chinese tourists	China’s tourists share	Chinese tourists base index 2010	Chinese tourists base share index 2010	Foreign tourist length of stay	Chinese tourists length of stay
2008	Arrivals	24,616					1.91	
	Accommodations	46,910						
2009	Arrivals	36,318					2.09	
	Accommodations	76,042						
2010	Arrivals	34,382	20	0,058%	1.00	1.00	2.22	1.75
	Accommodations	76,394	35	0,046%	1.00	1.00		
2011	Arrivals	30,349	39	0,129%	1.95	2.21	2.16	1.92
	Accommodations	65,584	75	0,114%	2.14	2.50		
2012	Arrivals	48,790	62	0,127%	3.10	2.18	1.86	1.77
	Accommodations	90,968	110	0,121%	3.14	2.64		
2013	Arrivals	50,074	70	0,140%	3.50	2.40	1.68	1.57
	Accommodations	83,883	110	0,131%	3.14	2.86		
2014	Arrivals	61,313	75	0,122%	3.75	2.10	1.66	1.60
	Accommodations	102,066	120	0,118%	3.43	2.57		
2015	Arrivals	79,238	78	0,098%	3.90	1.69	1.52	1.72
	Accommodations	120,669	134	0,111%	3.83	2.42		
2016	Arrivals	83,710	110	0,131%	5.50	2.26	1.57	1.60
	Accommodations	131,785	176	0,134%	5.03	2.91		

Source: (Republic of Kosovo Kosovo Agency of Statistics, 2017)

In Kosovo arrived the smallest number of Chinese tourists in comparison to other observed countries, which could be understood due to the, in general, the

[26] Authors estimated the number of arrivals and overnights using____________________?

lower international tourism flow also concerning the other observed countries. The share of Chinese in international tourism flow is very small, by 0.05 to 0.13 %. It is, also, assumed the high growth index, at 5.03 points, and good position of Chinese market segment in future. The length of staying is determined by general observation about Chinese tourist's behavior concerning combining arrangement, at 1.60 to 1.92 days.

5.2.7 Serbia

In Serbia during 2015 and 2016 there were 14.238 and 18.409 arrivals and 32.779 and 42.986 overnights of Chinese tourists which make 4.83–5.96 % of total arrivals and 8.07–9.70 % of total overnights (Table 20: Number of arrivals and accommodations of foreign tourists in Serbia between 2011 and 2016). Serbia is on third place by number of Chinese tourists after Croatia and Slovenia.

The share of Chinese tourists in the overall international tourism flow, concerning arrivals is in the range from 0.45 % to 1.44 % and in overnights in the range from 0.72 % to 1.57 % in the observed period, which is lower than in Croatia but higher in comparison to other observed countries. Index of growth in arrivals in 2016 is 5, 31 points which are rather a low index in comparison to other observed countries (Bosnia and Herzegovina, Croatia, and Macedonia). Chinese tourists in Serbia stay more than 2 and less than 3 days (in the range from 2.30 to 3.43 days) which is the longest stay in comparison to other observed countries and unlike other observed countries, Chinese stay the little bit longer than foreign tourists in general. This length of staying could point that Chinese tourist in Serbia probably find more motives to stay the little bit longer.

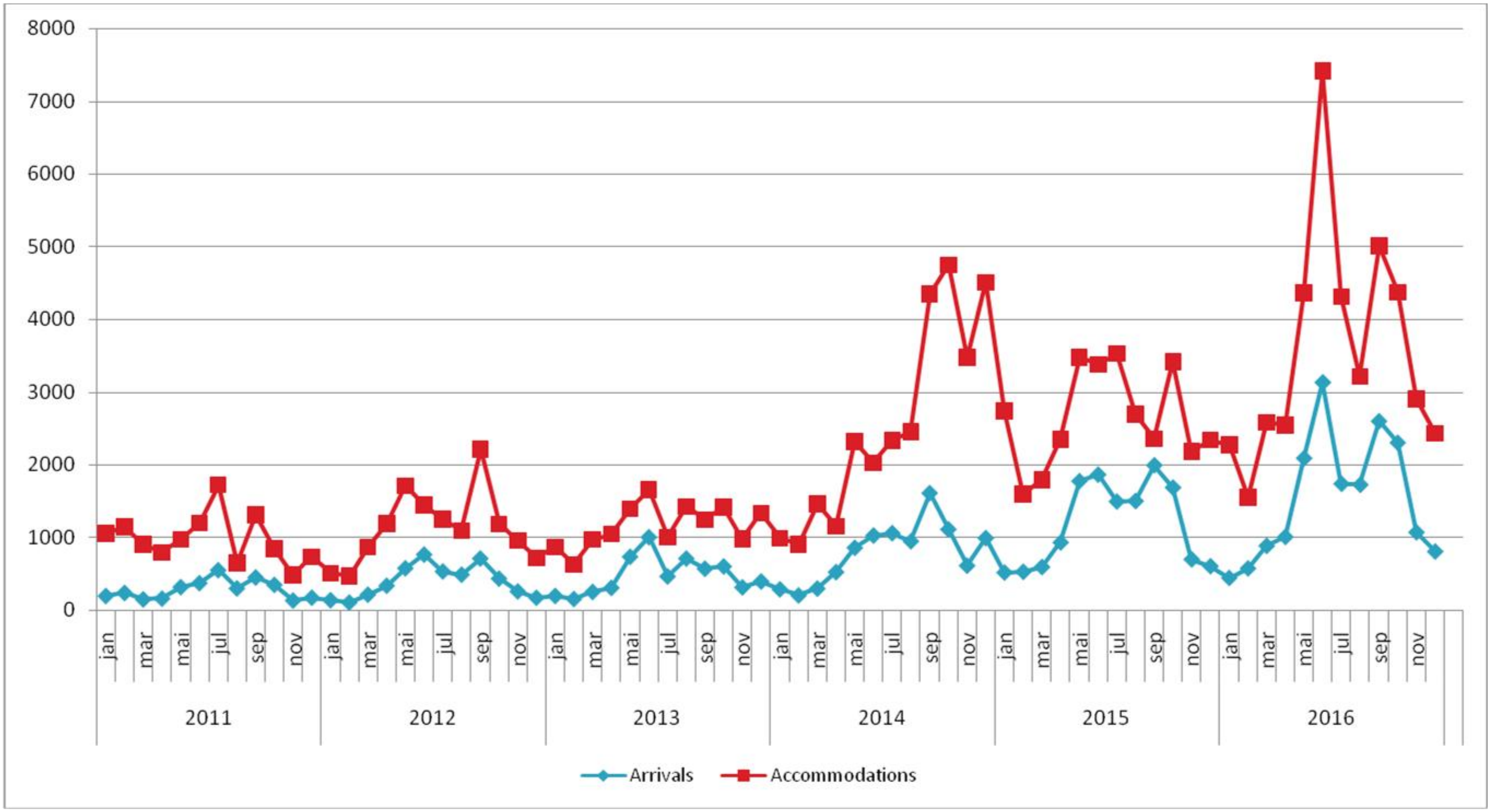
Table 20: Number of arrivals and accommodations of foreign tourists in Serbia between 2011 and 2016

		Foreign tourist	Chinese tourists	Chinese tourists' share	Chinese tourists base index 2011	Chinese tourists base share index 2011	Foreign tourists' length of stay	Chinese tourists' length of stay
2007	Arrivals	696,045					2.12	
	Accommodations	1,475,675						
2008	Arrivals	646,494					2.16	
	Accommodations	1,398,887						
2009	Arrivals	645,022					2.28	
	Accommodations	1,469,102						
2010	Arrivals	682,281					2.13	
	Accommodations	1,452,156						
2011	Arrivals	764,164	3,470	0.454%	1.00	1.00	2.15	3.43
	Accommodations	1,640,354	11,895	0.725%	1.00	1.00		
2012	Arrivals	809,967	4,812	0.594%	1.39	1.31	2.22	2.84
	Accommodations	1,796,217	13,665	0.761%	1.15	1.05		
2013	Arrivals	921,768	5,783	0.627%	1.67	1.38	2.16	2.43
	Accommodations	1,988,393	14,047	0.706%	1.18	0.97		
2014	Arrivals	1,028,732	9,592	0.932%	2.76	2.05	2.10	3.21
	Accommodations	2,161,054	30,749	1.423%	2.59	1.96		
2015	Arrivals	1,132,221	14,238	1.258%	4.10	2.77	2.13	2.30
	Accommodations	2,409,680	32,779	1.360%	2.76	3.00		
2016	Arrivals	1,281,426	18,409	1.437%	5.31	3.16	2.14	2.34
	Accommodations	2,738,998	42,986	1.569%	3.61	3.46		

Source:Republika Srbija Republički zavod za statistiku, 2017

The monthly distribution of arrivals of Chinese tourists in Serbia shows that the most visited months are June (2012, 2013), July (2011) and September (2014, 2015, 2016) which is in line with other observed countries and stated remarks before (Figure 20: The distribution of Chinese tourists in Serbia according to a month of arrival between 2011 and 2016).

Figure 20: The distribution of Chinese tourists in Serbia according to a month of arrival between 2011 and 2016



Source:Republika Srbija Republički zavod za statistiku, 2017

5.2.8 Slovenia

The Chinese tourism flow in Slovenia is lower than in Croatia but higher than in all other observed countries. In Slovenia during 2015 and 2016 arrived 37,234 and 44,464 Chinese tourists who spent 53,617 and 63,590 nights and that are 12.64–14.38 % of total arrivals and 13.20–14.34 % of total overnights in observed countries (Number of arrivals and accommodations of foreign tourists in Slovenia between 2005 and 2016).

The share of Chinese in overall international tourism flow varies in range from 0.113 to 1.524 % per arrivals and from 0.088 to 0.905 % per overnights in observed period. The Chinese share in 2016 is in line with Croatia, lower than in Bosnia and Herzegovina, and higher than in other observed countries. Chinese arrivals rose up by the index of growth at 16.47 points which is only lower than the index of growth in Bosnia and Herzegovina. That sign on the very strong position of Chinese market segment in future in comparison to other observed countries. Chinese tourists in Slovenia stay in a range from 1.43 to 2.43 days, slightly less than a length of staying of a foreign tourist in general (in the range from 2.41 to 2.83 days).

There is no great difference in length of staying among Chinese and foreign tourists in general, such as the case in Croatia and Montenegro, which points those Chinese tourists, have similar travel purpose as other foreign tourists such as the case in other observed countries.

Table 21: Number of arrivals and accommodations of foreign tourists in Slovenia[27] between 2005 and 2016

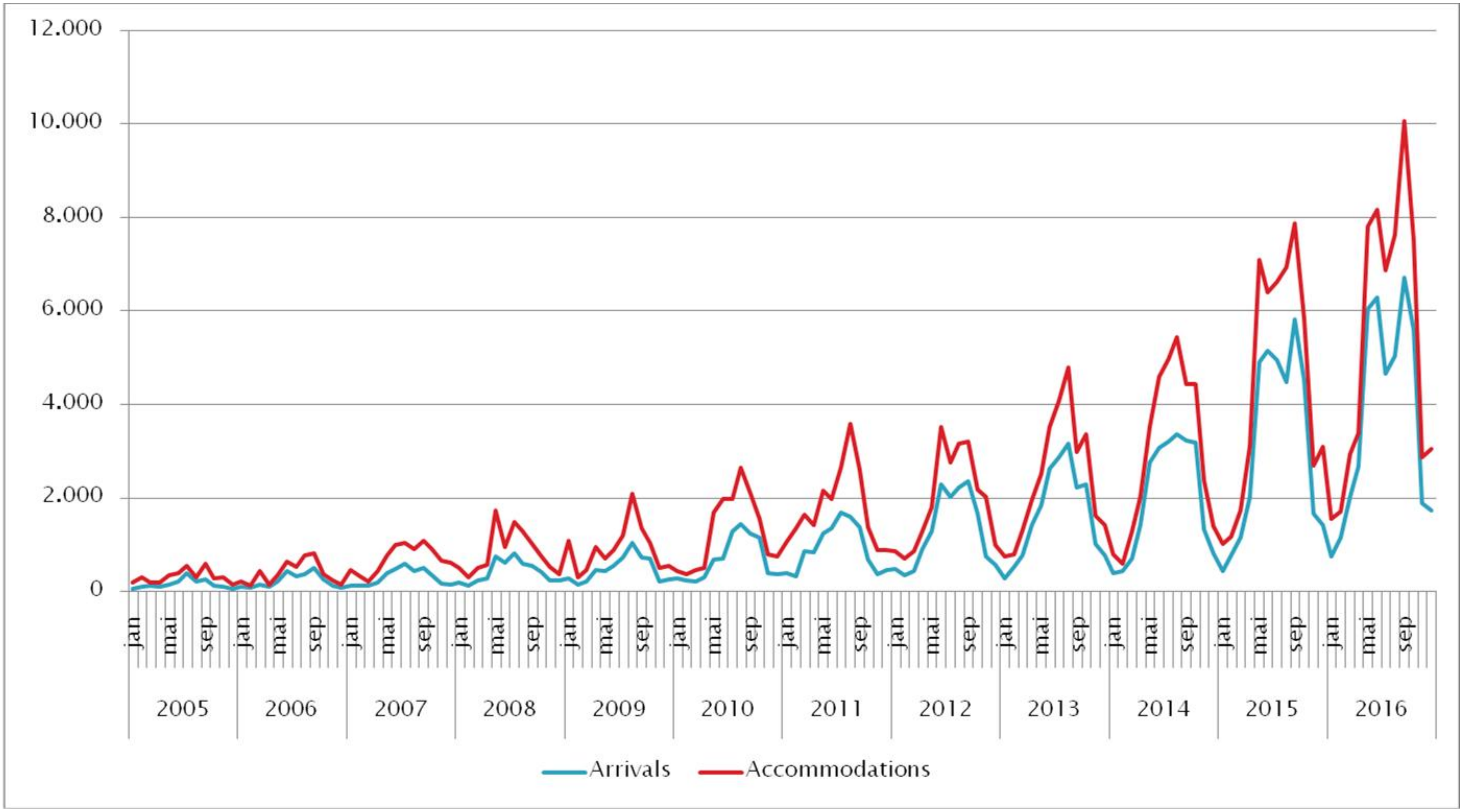
		Foreign tourists	Chinese tourists	China's tourists share	Chinese tourists base index 2005	Chinese tourists base share index 2005	Foreign tourist length of stay	Chinese tourists length of stay
2005	Arrivals	1,555,000	1,754	0,113%	1.00	1.00	2.83	2.20
	Accommodations	4,399,000	3,862	0,088%	1.00	1.00		
2006	Arrivals	1,617,000	2,615	0,162%	1.49	1.43	2.78	1.86
	Accommodations	4,489,000	4,874	0,109%	1.26	1.24		
2007	Arrivals	1,751,332	3,503	0,200%	2.00	1.77	2.78	2.43
	Accommodations	4,867,900	8,514	0,175%	2.20	1.99		
2008	Arrivals	1,957,691	4,887	0,250%	2.79	2.21	2.73	2.06
	Accommodations	5,351,282	10,090	0,189%	2.61	2.15		
2009	Arrivals	1,823,931	5,627	0,309%	3.21	2.74	2.71	2.00
	Accommodations	4,936,293	11,230	0,227%	2.91	2.59		
2010	Arrivals	1,869,106	8,205	0,439%	4.68	3.89	2.67	1.87
	Accommodations	4,997,031	15,348	0,307%	3.97	3.50		
2011	Arrivals	2,036,652	11,050	0,543%	6.30	4.81	2.68	1.97
	Accommodations	5,463,931	21,785	0,399%	5.64	4.54		
2012	Arrivals	2,120,763	15,208	0,717%	8.67	6.36	2.68	1.54
	Accommodations	5,676,273	23,411	0,412%	6.06	4.70		
2013	Arrivals	2,258,570	19,801	0,877%	11.29	7.77	2.64	1.48
	Accommodations	5,962,251	29,321	0,492%	7.59	5.60		
2014	Arrivals	2,410,824	23,827	0,988%	13.58	8.76	2.53	1.51
	Accommodations	6,090,409	35,915	0.590%	9.30	6.72		
2015	Arrivals	2,620,471	37,234	1.421%	21.23	12.60	2.43	1.44
	Accommodations	6,370,264	53,617	0.842%	13.88	9.59		
2016	Arrivals	2,918,436	44464	1.524%	25.35	13.51	2.41	1.43
	Accommodations	7,023,480	63,590	0.905%	16.47	10.31		

Source: Republika Slovenija Statistični Urad RS, 2017.

[27] Arrivals of tourists to an accommodation facility are defined with a number of persons arriving to the accommodation facility and checking-in. Arrivals include all persons irrespective of their age (including children whose accommodation is free of charge). Accommodations denote every night which a tourist actually spends at an accommodation facility (overnight or only spends some time there) or if only checked-in (person's physical presence is not necessary)(Slovenian Tourist Board, 2017).

The preferable months to visit Slovenia (The distribution of Chinese tourists in Slovenia according to a month of arrival between 2005 and 2016) regarding Chinese tourists are July (2007, 2008, 2011), August (2009, 2010, 2013, 2014) and September (2005, 2006, 2012, 2015, 2016). In case of Slovenia, the dispersion of peak months is similar as in Serbia and Macedonia and rather narrow in comparison to Bosnia and Herzegovina, Croatia and Montenegro.

Figure 21: The distribution of Chinese tourists in Slovenia according to a month of arrival between 2005 and 2016



Source: Republika Slovenija Statistični Urad RS, 2017

6 EMERGENCE AND GROWTH OF CHINESE TOURISTS IN THE REGION

The observation that “Chinese presence in the region was for a long time limited to involvement in the programmes of scientific and educational exchange between PRC and other socialist countries (before 1991) and to economic migration after the fall of socialist regimes in the region (after 1991)” (Chang & Rucker-Chang, 2011; in: Bofulin, Raspor, Stranjančević, Bulatović, & Lacmanović, 2016), is quite true and point on long term process of approaching the Chinese economy to Europe and to Balkan region specially.

In another view it is highlighted that “ from the Chinese venue point the region is part of Central and Eastern Europe (CEE), which has grown in importance to China’s foreign policy in recent years, especially due to its connection to one of the cornerstones of Chinese diplomacy – the New Silk Road initiative” (Pavlićević, 2015; in:Bofulin et al., 2016).

In context of cooperation among China and group of countries named as Central and Eastern European Countries (PRC-CEE) it was established Tourism Coordination Centre (TCC) in Budapest in May 2014, with main goal to develop and promote the relations among China National Tourism Association (CNTA) and 16 CEE countries. In this point CEE countries divided themselves in few subgroups such as Balkan region, Visegrad region and Baltic region (COTRI, 2016 in: Bofulin et al., 2016). In Balkan region it was determined few strengths such as novelty, Adriatic sea, diversity and past communist regimes and few weakness such as restrictive visa regimes, small number of direct flights, inadequate services and lack of strong destination brand (Ibid).

In few publications are discussed some issues about Chinese travelers in particular countries in West Balkan region such as preferences, characteristics and trip motivation (Raspor, Lacmanović, Stranjančević, & Bulatović, 2016a), tourist destination strength and opportunities (Stranjančević, Bulatović, Lacmanović, & Raspor, 2016), position of small destinations at the large source tourist market (Bofulin et al., 2016), factors of satisfaction (Bulatović, Stranjančević, Lacmanović, & Raspor, 2016), using web applications for travel planning (Raspor, Lacmanović, Stranjančević, & Bulatović, 2016b), economic impact (Lacmanović & Raspor, 2016) and tourism as invisible part of export (Raspor, Stranjančević, Bulatović, & Lacmanović, 2017).

Regarding Chinese tourist flow in the region, by far the most visited country is Croatia with 209,603 arrivals and 285,781 overnight stays in 2016. According to previous presented data countries that follow are Slovenia, Serbia, Bosnia and Herzegovina, Montenegro, Macedonia, Albania and Kosovo. Looking at the absolute numbers all these countries are far behind Croatia. Interestingly, Slovenia and Croatia had a comparable number of arrivals of Chinese tourists until 2010 where there is a sharp rise in Chinese tourists traveling to Croatia. On the other hand, Serbia had a relatively small number of Chinese tourists until very recently and exhibited high growth in the year 2014.

Concerning the relative numbers there is domination by Croatia which realized almost 70 % of all Chinese arrivals, following by Slovenia (14 %), Serbia (6 %), Bosnia and Herzegovina (4.3 %), Montenegro (3.9 %), Macedonia (2.1 %), Albania (1.5 %) and Kosovo (0.04 %).

In recent years, the share of Chinese tourists among all foreign tourists has increased in all the selected countries except Montenegro, but as seen below (Table 22: The trend of Chinese tourist's arrivals – part 1) this increase was the highest in Croatia, B&H and Republika Srbska. This rise in the last two countries is somewhat unexpected. Further research would be needed to establish whether this is an effect of the proximity of Croatia and a spillover effect or there are any other reasons for this increase. In any case, this increase points to a trend in the tourism sector that tourism stakeholders should be attentive to. Moreover, as seen in the table, the share of Chinese tourists in the region among all Chinese is also increasing in all the countries. This could mean that the destination brand recognition is improving in PRC.

In next two tables are presented the data about index of share of Chinese tourists in total international arrivals and length of staying.

Table 22: The trend of Chinese tourist's arrivals – part 1

		Base year	2016	Increase
Albania (2010)	Share of Chinese among foreigners	0,07107%	0,10136%	142,6%
	Share of Chinese among the Chinese	0,00299%	0,00318%	106,2%
BiH (2010)	Share of Chinese among foreigners	0,21070%	1,70758%	810,4%
	Share of Chinese among the Chinese	0,00134%	0,00879%	654,9%
Croatia (2010)	Share of Chinese among foreigners	0,16990%	1,51792%	893,4%
	Share of Chinese among the Chinese	0,02697%	0,13881%	514,7%
Kosovo (2010)	Share of Chinese among foreigners	0,05817%	0,13141%	225,9%
	Share of Chinese among the Chinese	0,00003%	0,00007%	209,1%
Macedonia (2010)	Share of Chinese among foreigners	0,26901%	1,28603%	478,1%
	Share of Chinese among the Chinese	0,00123%	0,00435%	354,5%
Montenegro (2010)	Share of Chinese among foreigners	0,09193%	0,71559%	778,4%
	Share of Chinese among the Chinese	0,00174%	0,00788%	452,1%
Serbia (2010)	Share of Chinese among foreigners	0,43970%	1,43660%	326,7%
	Share of Chinese among the Chinese	0,00523%	0,01219%	233,3%
Slovenia (2010)	Share of Chinese among foreigners	0,43898%	1,52356%	347,1%
	Share of Chinese among the Chinese	0,01429%	0,02945%	206,0%
Average	Share of Chinese among foreigners	0,19519%	1,19917%	614,4%
	Share of Chinese among the Chinese	0,05383%	0,20471%	380,3%

Source: (Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017)

However, even if this number may point to a growing trend of Chinese outbound tourism, these data may be somewhat misleading. Looking more into detail, the data also reveal that the time that Chinese tourists spend in individual country is persistently shrinking over the last decade. In case of

Slovenia (Table 23: The trend of Chinese tourists – part 2) it has fallen to 1,4 nights in 2015 (SURS, 2015), which is similar to Montenegro (1,36 nights in 2015). In Croatia, despite the relatively high number of tourists, the situation is worse (1.17 in 2015). Not much better fair other courtiers. The situation is better only in Serbia with 2.30 days.

Table 23: The trend of Chinese tourists – part 2

		Base year	2016	Increase
Albania (2010)	Foreign tourist nights	2,50	1,80	0,72
	Chinese tourists nights	1,70	1,58	0,93
BiH (2010)	Foreign tourist nights	2,21	2,11	0,95
	Chinese tourists nights	2,63	1,25	0,48
Croatia (2010)	Foreign tourist nights	5,60	5,23	0,93
	Chinese tourists nights	1,50	1,36	0,91
Kosovo (2010)	Foreign tourist nights	2,20	1,57	0,71
	Chinese tourists nights	1,75	1,60	0,91
Macedonia (2010)	Foreign tourist nights	2,14	2,06	0,96
	Chinese tourists nights	2,28	1,49	0,65
Montenegro (2010)	Foreign tourist nights	6,41	6,33	0,99
	Chinese tourists nights	1,90	1,42	0,75
Serbia (2010)	Foreign tourist nights	2,13	2,14	1,00
	Chinese tourists nights	3,30	2,34	0,71
Slovenia (2010)	Foreign tourist nights	2,67	2,41	0,90
	Chinese tourists nights	1,87	1,43	0,76
Average	Foreign tourist nights	4,54	4,03	0,89
	Chinese tourists nights	1,82	1,43	0,79

Source: (Estimations by the authors based on: Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017)

Index of growth of Chinese arrivals in mostly observed countries excluding Albania is presented by next figure (Figure 22: Index of growth of Chinese outbound tourism in countries of ex Yugoslavia in period 2010-2016).

Figure 22: Index of growth of Chinese outbound tourism in countries of ex Yugoslavia in period 2010-2016

Razmerje med prihodi v državo za leti 2016 in 2010. Temnejša barva pomeni večji količnik.

Source: (Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; in:Raspor & Lacmanović, 2017)

Looking at the average growth rate (geometric growth rate/GGR) of arrivals Chinese and foreign tourists in general for a period 2010-2016, it could be noticed that there is higher GGR of Chinese tourists than foreign tourists in general in Bosnia and Herzegovina (17.23 % vs. 12.25 %), Croatia (13.54 % vs. 5.88 %) and Montenegro (11.89 % vs. 7.26 %); and lower GGR of Chinese tourists than foreign tourists in general in Macedonia (9.33 % vs. 11.88 %), Serbia (6.14 % vs. 11.12 %), Kosovo (5,.50 % vs. 17.76 %) and Slovenia (5.42 % vs. 8.09 %) (Raspor & Lacmanović, 2017).

The most share of Chinese tourist in total international arrivals in 2016 is realized in Croatia (1.48 %), following by Bosnia and Herzegovina (1.47 %), Slovenia (1.31 %), Macedonia (1.28 %), Serbia (1.21 %), Montenegro (0.72 %), Kosovo (0.12 %) and Albania (0.10 %).

In some of the observed countries, using the mentioned publications, it could be stressed a few observations about the behavior of Chinese travelers.
Chinese tourists are most attracted by Slovenia and Croatia; mostly visit several countries during one trip; looking for information about destination through their friends, tourist agents, and brochures; impressed by unspoiled nature (Slovenia and Montenegro), peacefulness of the destination (Slovenia) and historical and culture heritage (Montenegro) which are key decision factors including value per money, places of interest, price and leisure possibilities; usually travel during period from May to October; the most attractive destination in Slovenia are: Ljubljana – the capital; the lake town of Bled and the Postojna Cave and in Montenegro are: Podgorica – the capital; the Skadar Lake national park and Montenegrin Coast; wanted to stay 4 days, express moderate willingness to revisit Montenegro and Slovenia, and they would prefer to visit these countries as part of a tourist package(Raspor et al., 2016a).

The main factors of satisfaction among Chinese tourists in Slovenia and Montenegro are those that points on primary elements of destination (natural resources and cultural and historical heritage). Due to short staying in destination it rise up the question of adapting hotel offer and organizing the animation during the stay through creation the offers for nightlife, sport and recreation, as well as enrichment of wellness and spa offers (Bulatović et al., 2016).

The Chinese travelers are using different structure in sources of information when travel to Slovenia and Montenegro, without significant differences by age and income groups when using mobile application in booking travel and accommodation which mean it is well accepted (Raspor et al., 2016b).

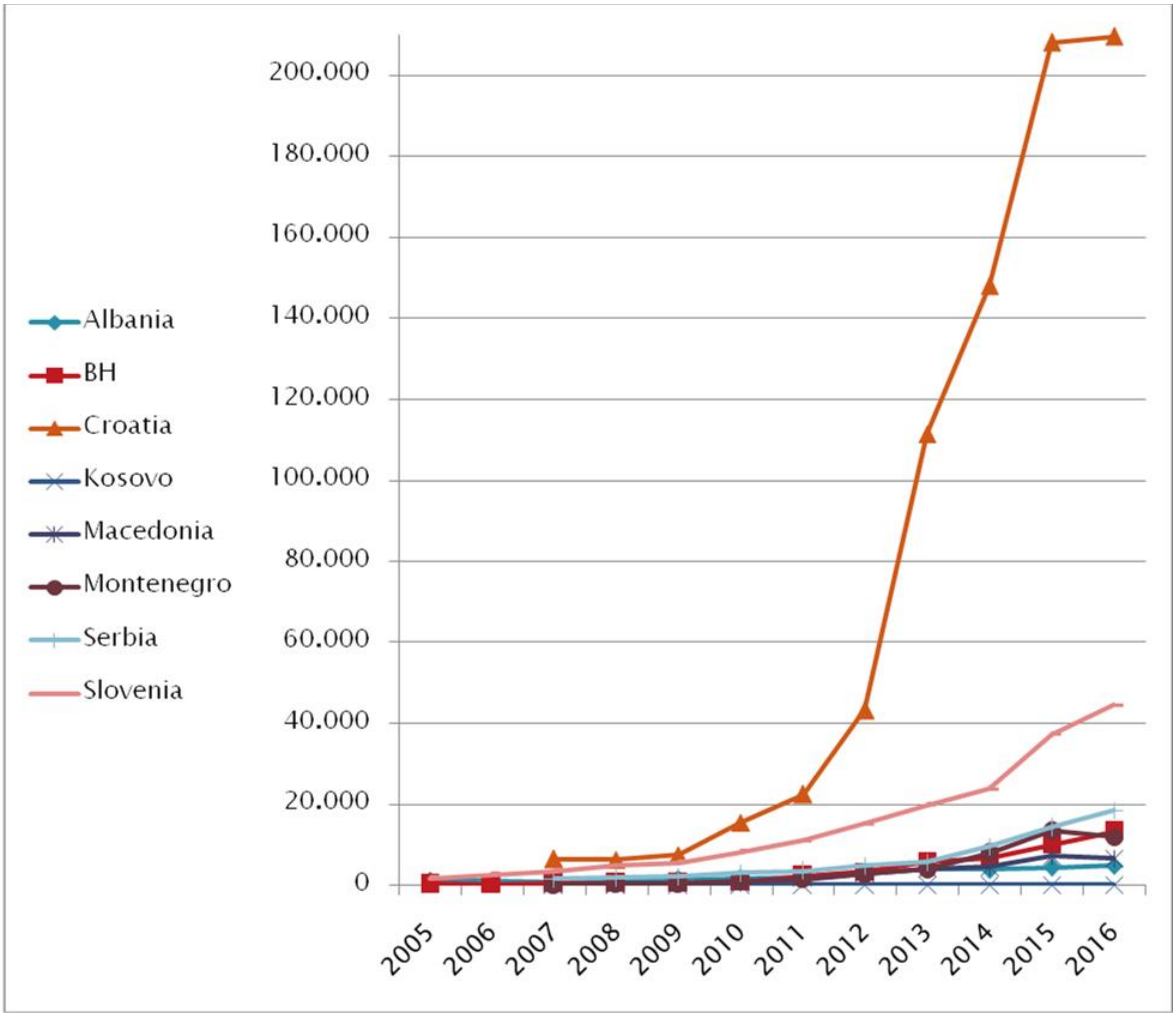
In order to use strength, avoid threats and take chance through opportunities, destinations such as Montenegro should carefully examine Chinese tourist's characteristics, travel habits and their decisions which would be base for custom tourism product (tour guides to speak basic Chinese language) (Stranjančević et al., 2016).

There is very law share by tourist expenditure of Chinese tourists in GDP in Slovenia and Montenegro but with high growth index in both countries. Chinese tourist expenditure is an important part of export in China in both countries and it is expected that China could become important partner in the international trade, as an "invisible export", as well(Raspor et al., 2017).

In Montenegro in 2015 was realized the strongest economic impact of Chinese tourism expenditure but in line to negative international trade balance (export account 22 % of import) net effect of "invisible export" is not significant. Slovenia had greater contribution of Chinese tourism expenditure in GDP than Croatia, but with lower importance in international trade to China than in Croatia. Economic impact of Chinese tourism expenditure was the lowest in Serbia which is inconsistent with share of export in China in total export in relation to other observed countries (Slovenia, Croatia, Montenegro) or in other words in Serbia the greater importance is on export of goods and raw materials than “invisible export” to China (Lacmanović & Raspor, 2016).

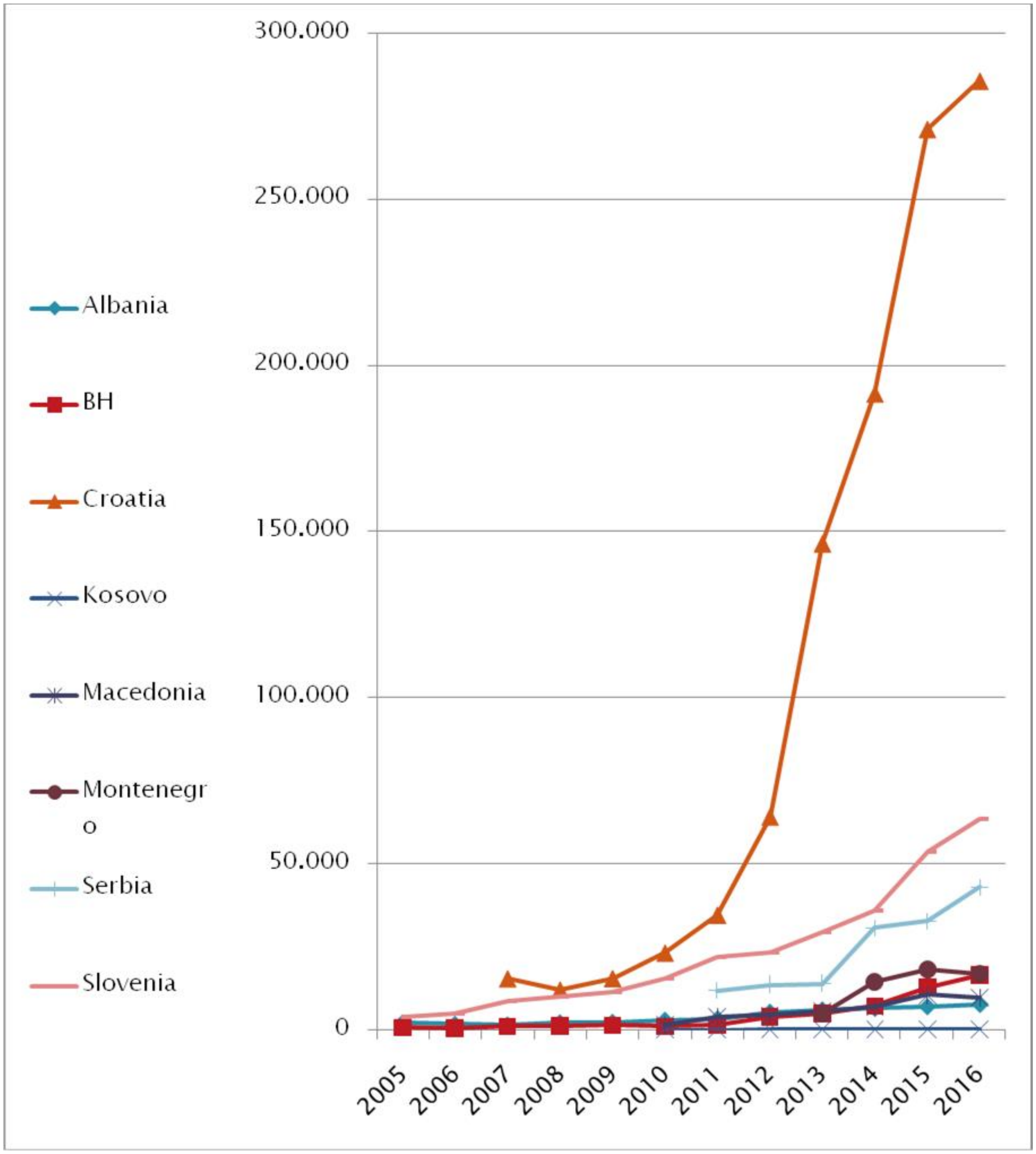
All in all, the cumulative number of Chinese tourists in region was 245,000 Chinese tourists (Figure 23: Chinese in selected countries of Balkan region – Arrivals from 2005 to 2016; Figure 24: Chinese in selected countries of Balkan region – Overnights from 2005 to 2016). But since they visit at least 4 countries in the region on average, these individuals were statistically counted several times. Based on this we can estimate that the region was visited by no more than 65,000 tourists, a much more modest number. In next two figures are presented arrivals and overnights of Chinese tourists in selected countries of Balkan region in period 2005-2016.

Figure 23: Chinese in selected countries of Balkan region – Arrivals from 2005 to 2016



Source: (Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017)

Figure 24: Chinese in selected countries of Balkan region – Overnights from 2005 to 2016



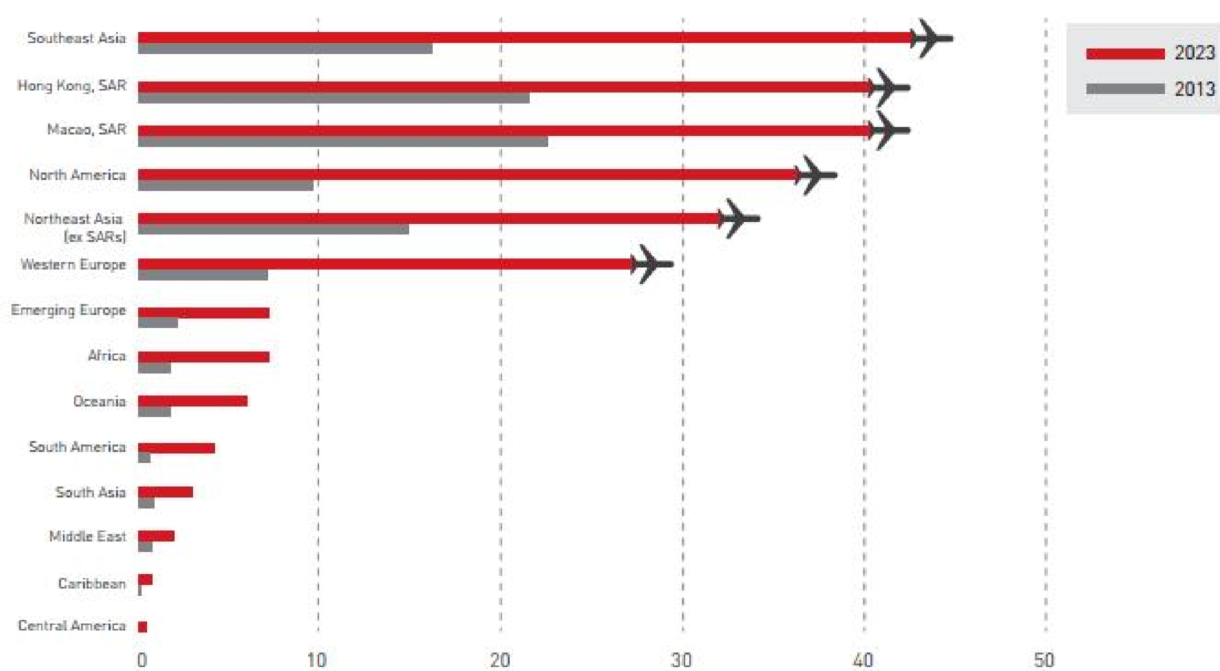
Source:Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017

7 FORECAST

The presented data highlights the very strong growth of Chinese outbound tourism, which is supposed to achieve continuous rise in the near future (Figure 25: The Future of Chinese Travel). Although the share of Chinese outbound travels to Europe is still low in comparison to other destinations, some predictions show high increase in future years (The Goldman Sachs Group, 2015).

It is expected in next five years that 400 million people will enter the middle class globally and many of them are originate from Asia Pacific region (Oxford Economics, 2015). In realistic scenario that Chinese household moved forward to middle and upper class it could push the global demand for long-haul travel which include more luxurious accommodation and shopping (Ibid).

Figure 25: The Future of Chinese Travel



Source: The Future of Chinese Travel (2015) by IHG and Oxford Economics(Oxford Economics, 2015)

According to IHG's recent report, *The Future of Chinese Travel*, cities are the primary destinations for Chinese travelers: 85% choose major cities as their destination of choice(World Economic Forum, 2015).

Using the data concerning Chinese international departures there are different methodologies. It is stated data about Border crossings(Macmillan Publishers Limited, 2018)[28], which is used by Chinese National Tourism Administration (CNTA) (China National Tourism Administration, 2016), also is used by another sources (Wolfgang Georg Arlt & Deng-Westphal, 2017). China has 102(Wikipedia, 2013) major border crossings, and there are direct connections (by airplane, train, boat) to Hong Kong at 25 border crossings, which on daily base are passed by 250,000 travelers(Hong Kong Immigration Department, 2015). UNWTO states that 18 million Chinese traveled from China to Hong Kong in 2015 (UNWTO, 2017a).

Besides, there are data by UNWTO and World Bank which are dealing with international arrivals by countries. There is no single methodology in data gathering. Some countries[29] record Chinese tourists in one category, other countries record Chinese tourists in few categories, "Mainland China", "Hong Kong-China", "Macao-China" and "Taiwan". Knowing the methodology of gathering data in statistical offices of the observed countries, all of the data are presented in one single category "China"(Investopedia, 2018)[30].

In general, CNTA data are more relevant for countries which bordering China. UNWTO and World Bank data allow an overlook of arrival in all other countries,

[28] Place on the border between two countries where people can cross, have their passports checked, and go through customs.

[29] Beside Croatia which records Chinese tourists in separate categories, in other selected countries of Balkan region and most of the countries in world Chinese tourists are recorded as one category "China" which include "Mainland China"; Hong Kong, SAR; Macao, SAR and Taiwan. In further discussion, it would be used that categorization.

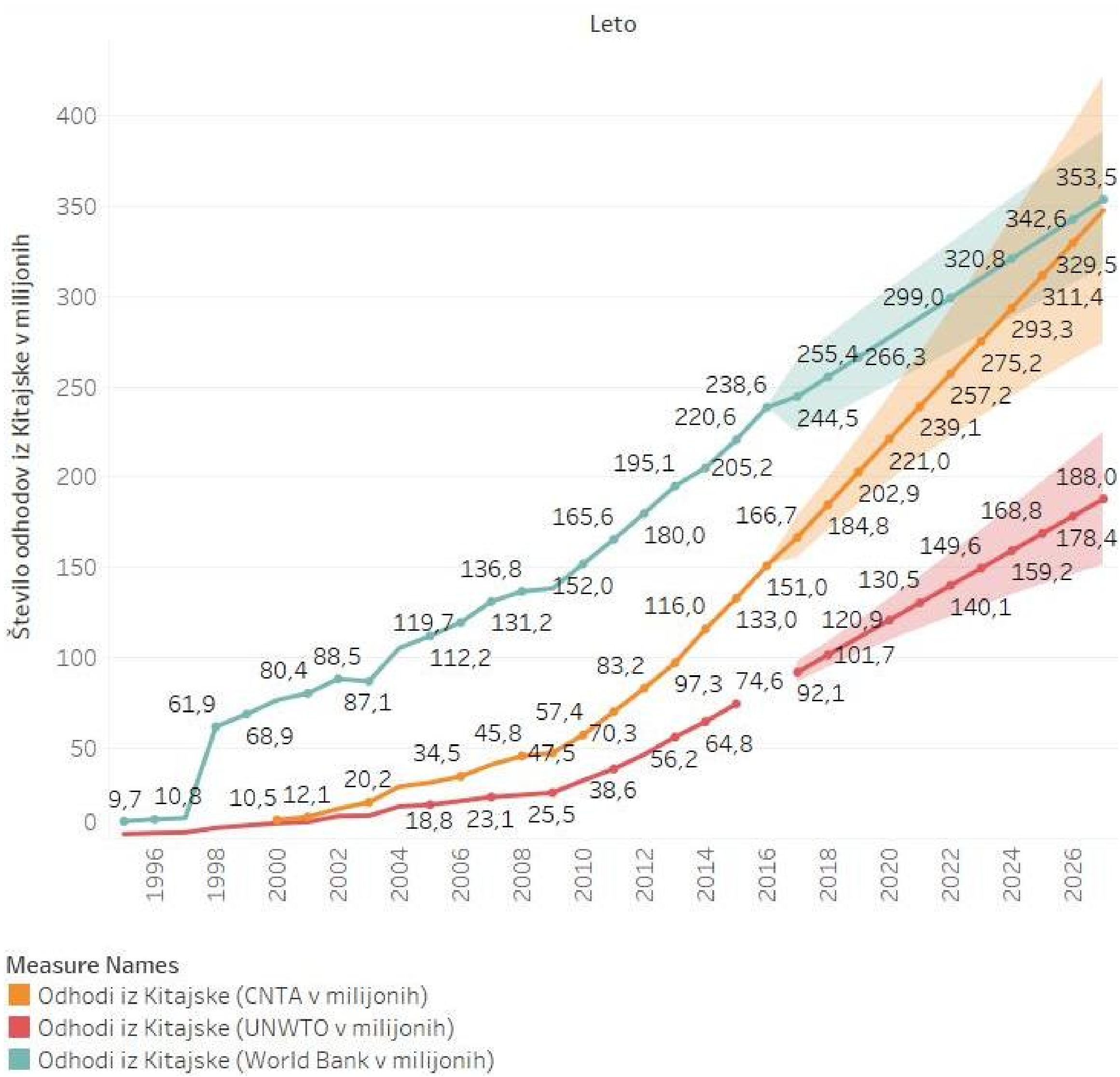
[30] Recording as Special Adminstrative Region (SAR)

which are not interesting in daily migration flow such as the case in China-Hong Kong, for example.

Based on the data presented and information gathered we could forecast the future trend of Chinese tourists' arrivals. Following UNWTO, the predictions about the total number of Chinese outbound tourists go as high as 450 million Chinese traveling in 2030 (UNWTO, 2017a. Our prediction (Figure 26: Actual trend and forecast of Chinese outbound arrivals in world in period 1995-2027) is 350 million till 2027 and 995,000 Chinese tourists in the Western Balkan (Figure 28). However, we believe that these numbers may be too ambitious and that the growth will slow down after 2020 (Figure 27). Thus, we estimate that the number of Chinese tourists in the region will not exceed 600,000 tourists in 2027.

The data stated in the figure below refer to actual data and forecast the growth trend of Chinese tourists in world from 1995 to 2027. Also in this figure (Figure 26: Actual trend and forecast of Chinese outbound arrivals in world in period 1995-2027) it is presented growth trend using the CNTA, UNWTO and World Bank data.

Figure 26: Actual trend and forecast of Chinese outbound arrivals in world in period 1995–2027



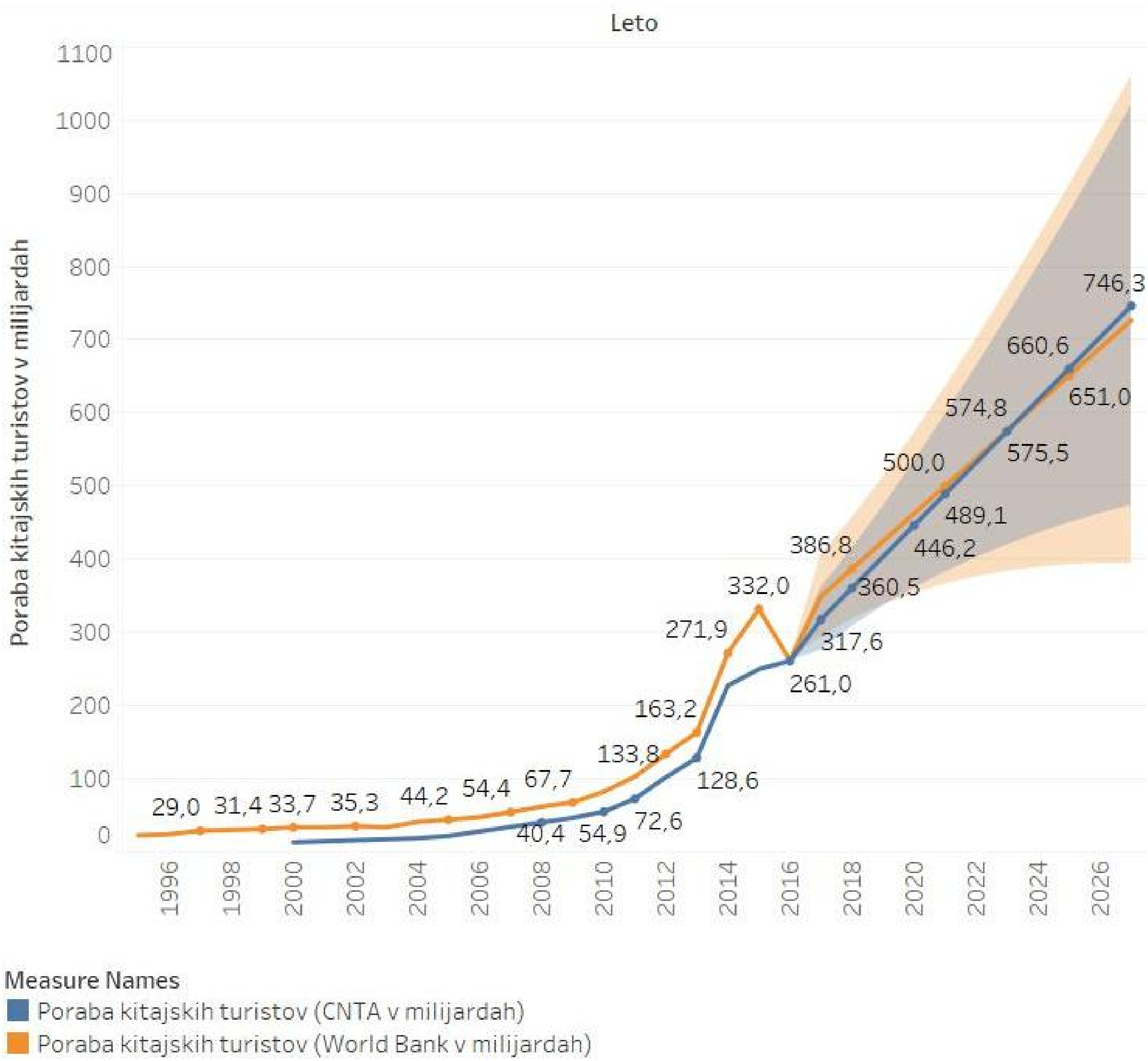
Source: World Bank, 2017; UNWTO, 2017a; China National Tourism Administration, 2016; Arlt & Deng-Westphal, 2017;Own processing

With 90 % of probability, it could be expected that till 2027, 188 million of Chinese tourists would travel. Border crossings would be greater. It is expected that from Mainland China to Hong Kong-China, Macao-China and Taiwan including their daily migration flow it would be 350 Border crossing. Average growth rate (GGR) in period 2017-2027 would be 5.9 % in comparison to total

world tourism growth rate at 2.36 % (which had been calculated and presented (Figure 6: Actual trend and forecast of international tourist arrivals in period 1997 – 2050).
Concerning these numbers, it could be seen the great potential in Chinese outbound market although a few destinations have realized the benefits from it (UNWTO, 2018). The spending power, the outbound travel demand and consumption preferences vary from region to region which means that the reaching this outbound market presents a great challenges (Ibid).

For the needs of this research, we prepared forecasts of world expenditure Chinese tourists (Figure 27: Actual trend and forecast of Chinese tourism expenditure in world in period 1995–2027). We took into account two bases: CNTA in World Bank.

Figure 27: Actual trend and forecast of Chinese tourism expenditure in world in period 1995–2027

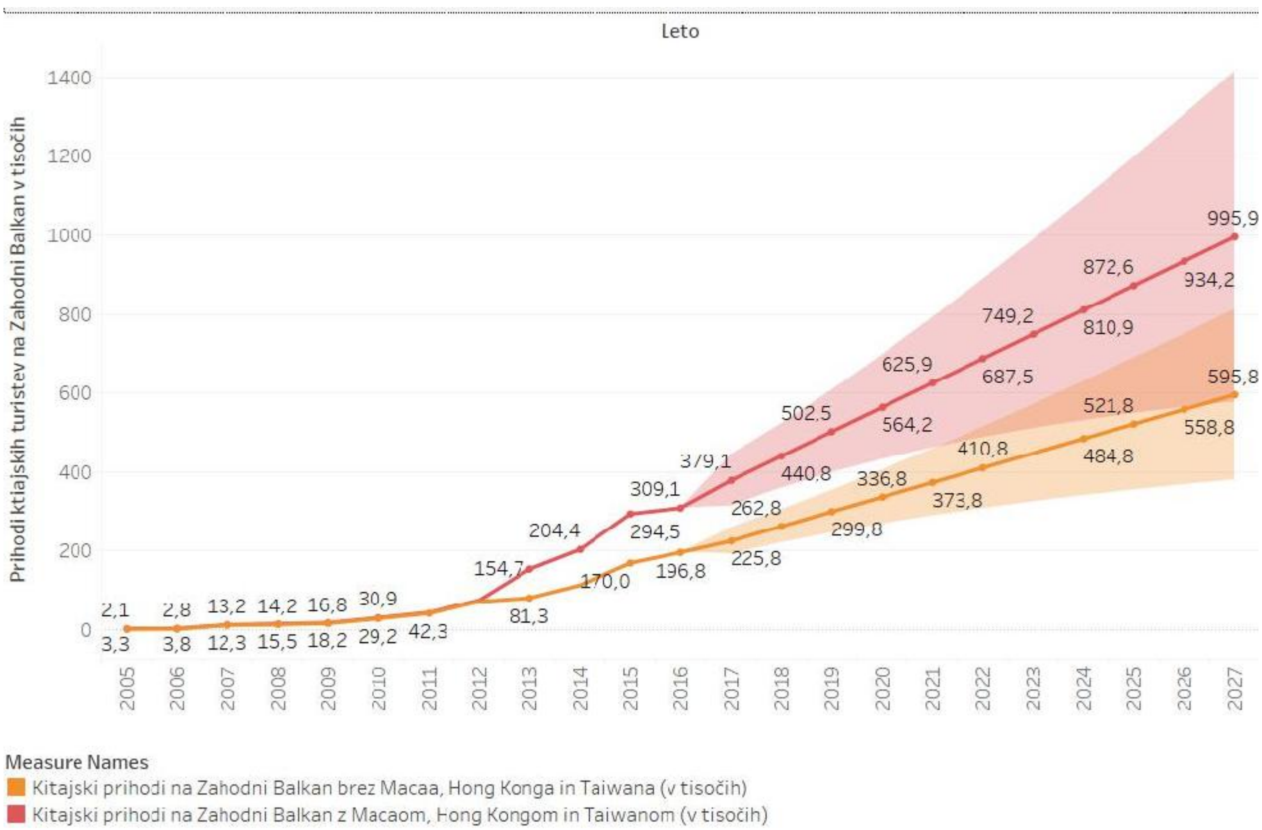


Source: Estimations by the authors based on: World Bank, 2017; UNWTO, 2017a;

It could be assumed, with 90 % of probability, that in 2027 Chinese tourism expenditure will be 746 billion USD. Average growth rate (GGR) in period 2017–2027 would be more than 20 % (which had been calculated and presented in figure 26).

Taking into account the trend of arrivals of Chinese tourists in selected countries of Balkan region in observed period it is formed the forecast of future arrivals till 2027. This is presented by figure (Figure 28: Actual trend and forecast of Chinese outbound arrivals in selected countries of Balkan region in period 2005–2027).

Figure 28: Actual trend and forecast of Chinese outbound arrivals in selected countries of Balkan region in period 2005–2027

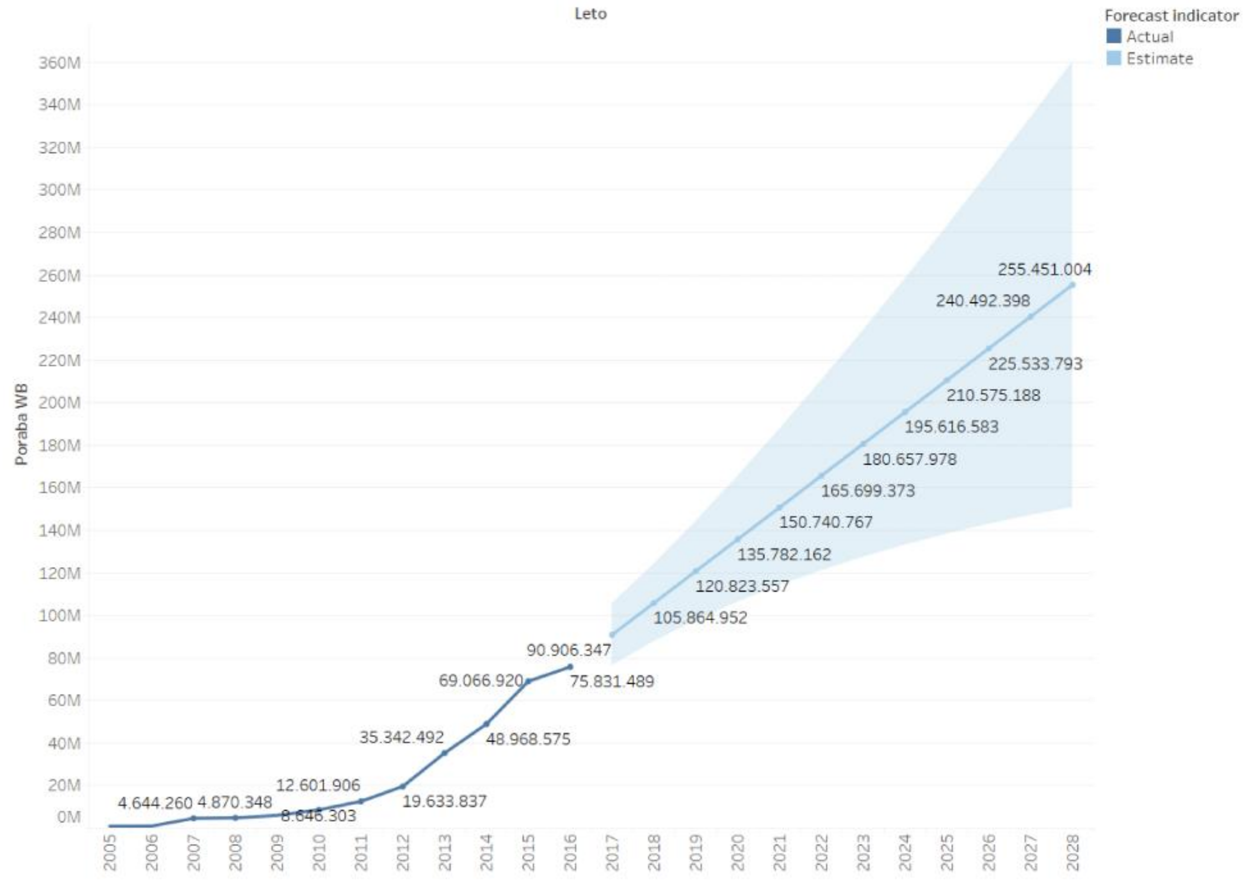


Estimations by the authors based on: Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017

By the presented data concerning Chinese arrivals in selected countries of Balkan region in observed period, we can calculate that the average growth rate of arrivals in the years 2017-2027 will be 10.5 %.

The last forecast is forecast for Chinese tourism expenditure in selected countries of Balkan region in period 2005–2027. In the forecasts, we rely on the perceived consumption of Chinese tourists in Slovenia, which is 171 EURO per day (Raspor, 2018). From this consumption, we calculated the average consumption by the countries involved. This varies from country to country. It is the highest in Slovenia and the lowest in Macedonia. From these findings we predicted future consumption (Figure 29: Actual trend and forecast of Chinese tourism expenditure in selected countries of Balkan region in period 2005–2027).
Consumption of Chinese people living in Italy and coming to Slovenian casinos should be added to this consumption. In 2016 its amount was to 35 million Euros. In 2017 there was already over 40 million Euros.

Figure 29: Actual trend and forecast of Chinese tourism expenditure in selected countries of Balkan region in period 2005–2027



The trend of sum of Poraba WB (actual & forecast) for Leto. Color shows details about Forecast indicator.

Estimations by the authors based on: Republika Slovenija Statistični Urad RS, 2017; Republic of Kosovo Kosovo Agency of Statistics, 2017; Republic of Macedonia State Statistical Office, 2017; Republika Hrvatska Državni zavod za statistiku, 2017; Agencija za statistiku Bosne i Hercegovine, 2017; Zavod za statistiku Crne Gore Monstat, 2017; Republika Srbija Republički zavod za statistiku, 2017; Republic of Albania Instat The Institute of Statistics, 2017

Taking into account all the simulated preliminary consumption data, it can be estimated that the average growth rate of consumption in the years 2017-2027 will be more than 20 %.

8 CONCLUSION

The main question which could be asked is: What are the main obstacles which could prevent the main effects of the supposed growth of Chinese outbound tourism in selected countries of Balkan region and what are possible directions of future dealing with?

First of all, there is limited cooperation among all selected countries of Balkan region (Slovenia and Croatia, Serbia and Montenegro) in dealing with Chinese tourists. It could be discussed the opportunities in networking the main tourism subjects in most of these countries in order to use synergy effects in joint promotional and sales activities. Joint approach vs. individual could be a solution to prevent lower effects of the expected growth of Chinese tourists.

Secondly, there is still poor knowledge about Chinese outbound tourism market. In the context of observed actual and future importance of Chinese market segment in total international tourism flow, there is need to take active measures in marketing research and planning concerning the main Chinese tourism market figures and trends.

Thirdly, there is low mutual knowing and understanding about strength and weakness concerning joint tourism products which could be offered at the Chinese outbound tourism market. Through international initiatives and projects funded by European Commission (IPA or structured funds, for example) there is very good possibilities to upgrade this knowledge gap and to create the new joint tourism product for Chinese tourism market.

In general, there are great possibilities for all observed countries to improve marketing approach at the Chinese outbound tourism market.

9 LIMITATIONS OF THE STUDY AND FUTURE RESEARCHE DIRECTIONS

The study has certain acknowledgeable limitations and offers some directions for future research.

Lack of some data point on limiting the scope of our analysis and prevent detailed finding to be presented. All data were collected from secondary sources with all limitations in that sense.

There were no prior research studies on this topic which sign on some findings which couldn't be compared with similar one and to find out whether there is some inconsistency or not.

Some sources which are used had the different scope of data such as a number of Chinese departures and it was the limitation in sense to analysis the one type of data and to present clear research results.

This study, as applicative research, define some of the opportunities for future research in terms of the new aspect concerning the subject.

It would be interesting to find out some economic impact of Chinese outbound tourism on observed countries' economies in a few categories such as gross domestic product, investment, employment and foreign trade.

Also, it would be important to rise up some general questions concerning the Chinese outbound tourism and the observed countries such as immigration policy and visa regime, intercultural differences and tourism impacts, security and safety concerning terrorist attacks, sustainability and tourism overcapacity, end etc.

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