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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 become 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 China¹as 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.

¹Chinese 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.

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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

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(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 Commission, 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

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” (Pavličević, 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,

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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 Srpska. 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

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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

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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.

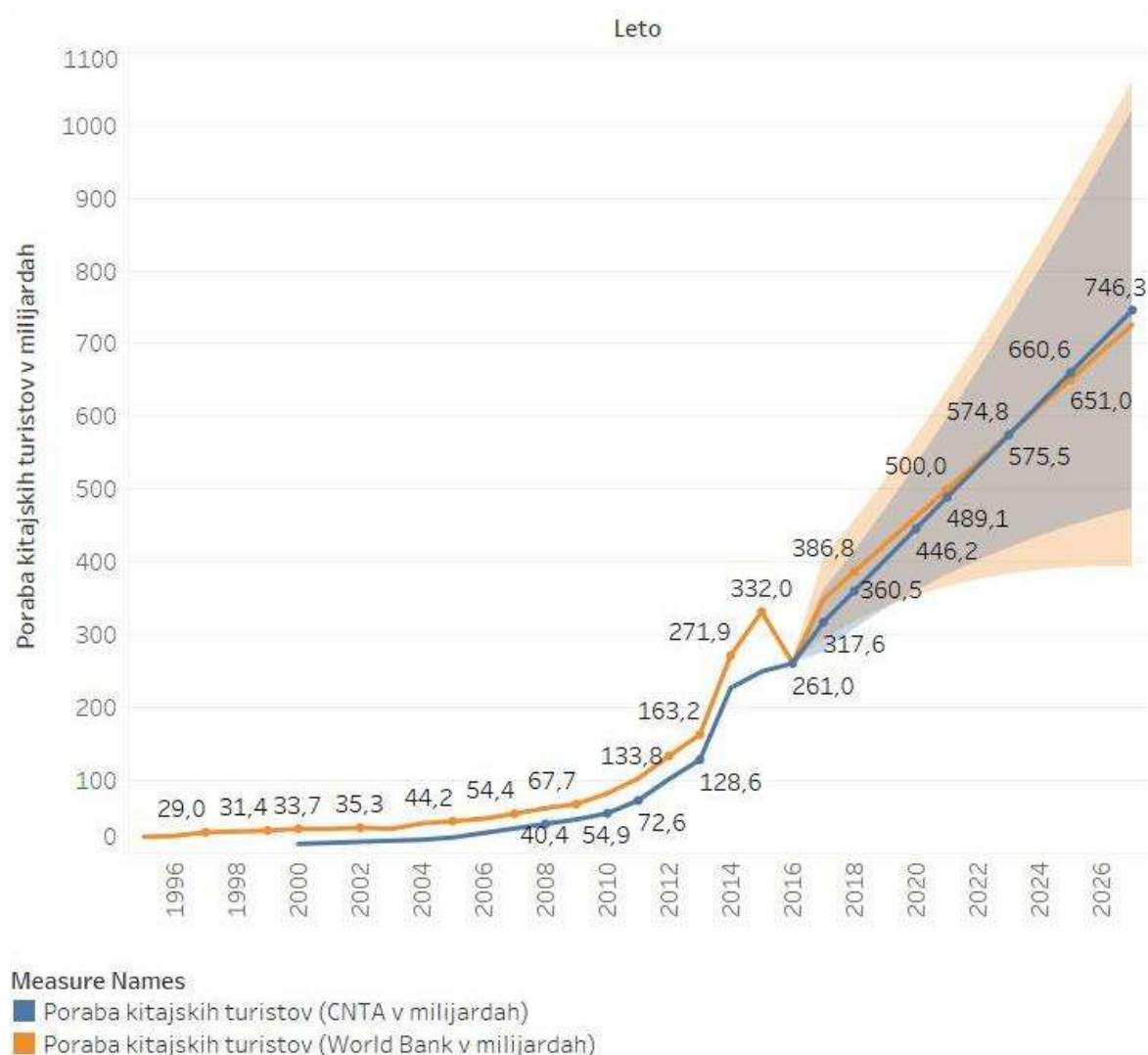
Table 23: The trend of Chinese tourists – part 2

		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)

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



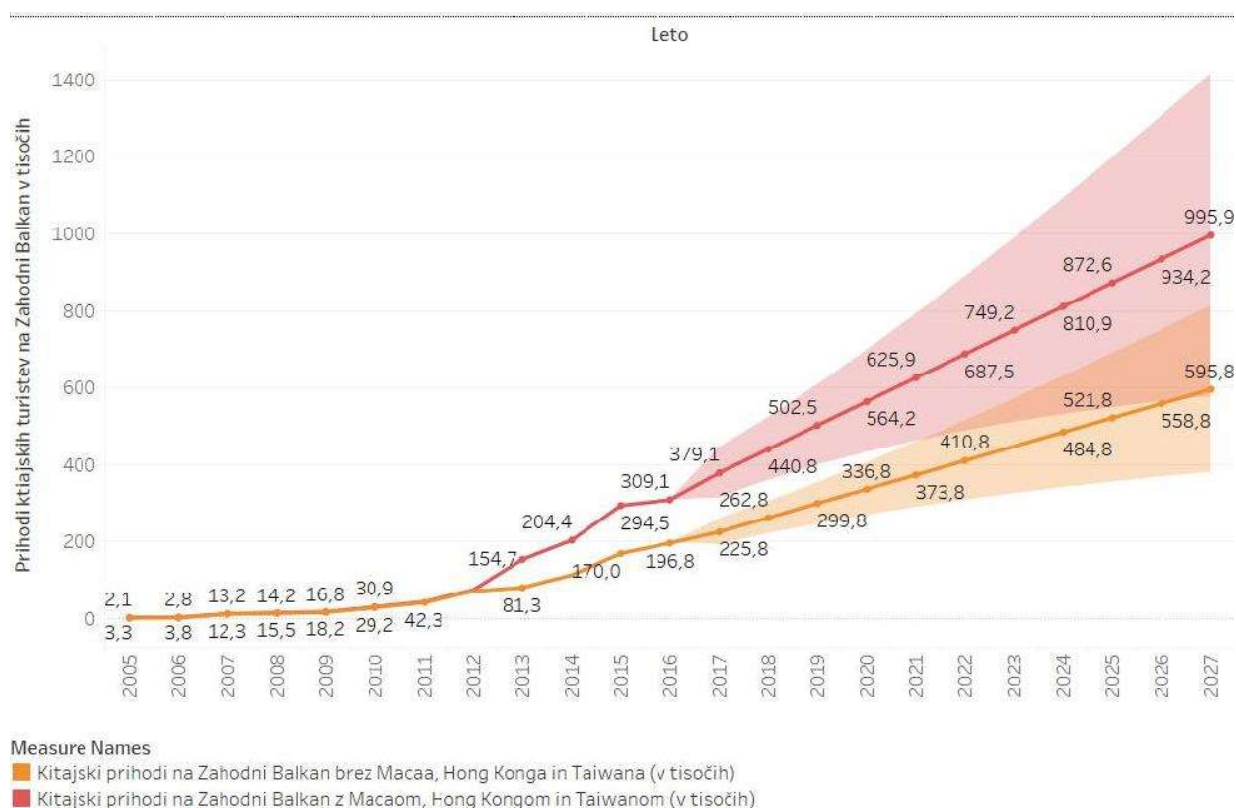
Source: Estimations by the authors based on: World Bank, 2017; UNWTO, 2017a;

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).

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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

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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.

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