MASTER THESIS

IDENTIFICATION OF TOURISM FLOWS OF CHINESE TOURISTS IN SLOVENIA

Ljubljana, November 2019

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AUTHORSHIP STATEMENT

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LIST OF ABBREVIATIONS

B2B Business to business
COTRI China Outbound Tourism Research Institute
DMO Destination management/marketing organisation
Et al. And others, to complete a list of authors of a published work
ETC European Travel Commission
EU The European Union
EUR Euros
FAM & Press trip Familiarization and promotional trip
FDI Foreign direct investment
FIT Free independent tourist
GDP Gross domestic product
GIT Group inclusive tour
GPS Global positioning system
ICT Information and communication technology
MICE Meetings, Incentives, Conferences and Exhibitions
NSVF Niche strategic visitor flow
OTA Online travel agency
<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<td>para.</td>
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<tr>
<td>SGDM model</td>
<td>St. Gallen model for Destination Management</td>
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<tr>
<td>SMS</td>
<td>Short message service</td>
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<tr>
<td>SORS</td>
<td>Statistical Office of the Republic of Slovenia</td>
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<tr>
<td>SVF</td>
<td>Strategic visitor flow</td>
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<tr>
<td>TDOA</td>
<td>Time difference of arrival</td>
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<tr>
<td>UNESCO</td>
<td>The United Nations Educational, Scientific and Cultural Organization</td>
</tr>
<tr>
<td>UNWTO</td>
<td>(The United Nations) World Tourism Organization</td>
</tr>
<tr>
<td>VIP</td>
<td>Very important person</td>
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INTRODUCTION

Chinese outbound tourism has become the largest source market and has grown exponentially since the turn of the last century. Furthermore, it is estimated to continue expanding over the next couple of decades. United Nations World Tourism Organisation (UNWTO) (2018b) recorded a total of 1.3 billion international tourist arrivals in 2017, with a forecast of reaching 1.8 billion by 2030 - adding 500 million border-crossing trips. According to China Outbound Tourism Research Institute (COTRI) (2018), mainland Chinese travellers made more than 162 million outbound trips in 2018, a 12.5 % increase in the same period in 2017, when they spent almost EUR 226 billion while on them, staying the world’s leading outbound market by expenditure, according to the United Nations World Tourism Organization (UNWTO) (2018b). More than half of the trips went beyond Greater China (Hong Kong, Macau, and Taiwan), bringing over 84 million Chinese to destinations around the world. By 2030, 390 million outbound trips will originate from this large source market, 250 million more than in 2017 – meaning that half of the additional outbound travellers in next decade will be Chinese (COTRI, 2018). Consequently, mainland China will account for nearly a quarter of future international tourism that has become economic and social force of global significance.

In addition to increasing direct flights, convenient visa processes, and awareness of the Chinese holiday calendar, there is plenty of room for destinations to gain growth in terms of tourism and attract these particular travellers by becoming China-friendly destinations. With new generations of Chinese tourists travelling to Europe, segmentation is the main characteristic of this enormous outbound market. “People can afford to travel in a more flexible and exclusive way. A selfie at the Eiffel Tower is no longer such a precious must-have,” says Jane Sun, chief executive of Ctrip, China’s largest online travel agency (OTA). “Now, Chinese people want to explore uncharted territory and experience things rather than see them (Aldama, 2018).”

The Chinese outbound tourism to Slovenia has experienced rapid growth and development since 2004, when Chinese government arranged the so-called “Approved destination status” policy for additional 35 countries including Slovenia, for allowance to holiday travellers to visit the destination on group packaged tours (UNWTO, 2017). Statistical Office of the Republic of Slovenia (SORS) (2019a, 2019c, based on data for the years 2010-2018) recorded a total of 335,844 tourist arrivals and first time over half a million (521,208) overnight stays by Chinese tourists over the last 9 years, 136,442 overnight stays in 2018 alone.

One implication of the above statistics and facts is that the government of Slovenia and the destination management/marketing organisation (DMO) involved would face a concrete challenge in managing this volume of Chinese tourist activity in the coming years, while ensuring sustainable practices and a high brand value for Slovenia as a tourist destination.
Thus arises the need of a structured basis to organise and manage the cumulative set of tourist activities with regards to this target group.

This thesis humbly attempts at developing such a necessary basis for industry as well as academia to apply in practice or build upon.

This master thesis aims at answering the following questions:

- Research question 1: What are the strategic visitor flows (SVFs) of Chinese tourists in Slovenia?
- Research question 2: What are the niche strategic visitor flows (NSVFs) of Chinese tourists in Slovenia?

The present study has three main objectives. First, to examine and identify the presence of the spatio-temporal behaviour of Chinese outbound tourists inside the Slovenian borders with a set of depicted significant strategic visitor flows. Second, to rate this flow-based view of the destination space in terms of SVFs: to discuss the variable geometry and their importance to determine the portfolio of SVFs - how stable, reappearing, well-catered to supply-side, and innovative they are. Third, to determine and propose potential future tourism flows of Chinese tourists in Slovenia, identified during the research process.

First part outlines the research paper context and existing literature with the theoretical background of concept belonging to tourism flows and miss usage of the term itself. The methods described in chronological order show an evolution in research approaches from the use of traditional data and models to a so-called big data revolution, since they have become available, elaborating on the advantages and limitations of each method to determine a suitable alternative. To achieve the first objective, tourism statistics of Chinese tourists in Slovenia during 2014-2018 are analysed in the second part of this paper.

Furthermore, existing and potential tourism flows of Chinese tourists in Slovenia are identified based on 9 in-depth interviews with representatives of Slovenian tourism sector conducted by the author, the analysis of resulting qualitative data and the use of the St. Gallen model for Destination Management (the SGDM) - model by authors Beritelli, Reinhold, Laesser & Bieger (2015) as a diagnostic tool. In the interest to ensure full confidentiality and anonymity of the participants in this research, recorded and written conversations with respondents are not append to prevent their direct exploitation. Considering their expertise in this niche segments, their personality could be easily disclosed because of the limited number of actors in private and public sector in Slovenia.

The crucial take-away is the differentiation between two concepts, SVFs and NSVFs. The SGDM model originates very comprehensive, but when it comes to actual realization there are no further practical directions or provided tools for implementation of the analysis itself. In order to achieve the second and third objective, it was mandatory to develop practical outline in order to prioritize decision criteria and enable execution of the process of tourism
flows development covered by models’ steps 1 and 2, whereas three features were recognized: 1) sequences are not the crucial factor nor they genuinely influence on the subject in this matter, and the total travel pattern of a tourist (in the big majority) does not happen in one day, but it happens over one to five days. 2) Thus, the SDGM model’s one visitor day as a point of reference is also not vital for this analysis. Correspondingly, content in this manner is the most important visible feature in this analysis, which will serve as a starting point to overall understanding of SVF mapping in Slovenia and conscious distinction from the SGDM model. 3) For the purpose of flow identification, one city location would not be marked several times as a part of the tourist flow, but only once (nonetheless, the actual travel pattern on the map would not be influenced or mistreated).

Discussion of revealed findings, recommendations for relevant actors on the destination and further research is structured around two research questions, followed by research limitations. Finally, conclusion summarises the obtained insights in comparison to the existing knowledge of tourist movements in the research paper context, whereas also the relative merits of initiated practical approach are discussed.

1 CONTEXT AND LITERATURE REVIEW

Research topic of my master thesis applies to three areas in destination management, which has been alone a subject of research and practice over three decades: movements of visitors in space in different patterns of travel, existence of multiple tourism systems within a single given geographic space, and generating travel patterns on demand side. Although in the recent years it appears evidently that research field has reached a point where the past work was transformed into development of comprehensive models of limited explanatory power, particularly when they have to stand the test of transfer from research to practice (Beritelli et al., 2015).

1.1 Tourism flows: Theoretical background and misinterpretation

Hence, the concept tourism flow as such is misunderstood, within earlier both economic and tourism research, and international tourism is typically represented as “the flow of humans from one country to another” (Keum, 2008). Instead of geographical mapping of tourist movement patterns, it is understood as a proxy for tourism demand. The dependent variables within these models include, in most cases, tourism flows measured either by number of arrivals and departures, or by demand in terms of expenditure and receipts, that is indirectly including the dimension of overnight stay of (resident and non-resident) visitors in the individual destination (Andraz & Rodrigues, 2016). Regularly the analyses are more complex, including several dependent variables or comparing more than one destination (Marrocu & Paci, 2011; Zhang & Jensen, 2007). However, this is the core of the misapplication of the concept itself that currently dominates our perception of a destination as a supply-dominated perspective, while authors adopt yearly statistical numbers and with
use of several statistical tools and models twist them into “representative tourism flows”. Outcomes remain, alike inputs, to be static.

The tourism-demand model has prevailed in the literature as the appropriate modelling framework to estimate all sorts of coefficients of the variables that directly, among other things, affect these tourism flows: 1) the gross domestic product (GDP), international tourist trade and foreign direct investment (FDI), primarily explaining spill over effects (Yang & Wong, 2012), often measured throughout 2) “consumption abroad”, how income changes in originating countries or changes in relative price and exchange rates (De Vita, 2014), 3) transportation cost, or 4) price elasticity from tourism and other coefficients (Garin-Munoz & Amaral, 2000; Mwase, 2013).

Despite misleading literature, many authors prior to Beritelli and Bieger and Laesser (2014) were trying to crystallise visitor behaviour in certain time and geographical space. Compared to other tourism topics, the extent of literature on tourism flow is minimal: thus researchers may be better informed by web-based materials than relying upon published academic papers to inform their practice in the area (Edwards, Dickson, Griffin & Hayllar, 2010).

According to Shoval and McKercher and Birenboim and Ng (2015), human spatial behaviour is the sum of three parallel dimensions: “what”, “when”, and “where”. Defining the type of activity taking place, describing the temporal dimension of the same activity, and its spatial component. The greatest variation among those significant studies, nevertheless, is observed in the methods used. Mainly, they can be divided into five groups: 1) studies using observational methods, 2) studies using space-time budget techniques, 3) studies using satellite- and land-based tracking systems, 4) studies using digital space-time tracking systems, and the newest 5) studies using data-mining techniques. Historically, researchers tried to tackle all three dimensions, always on the cost of limitations, based particularly on the methods used. The phases described below in chronological order show an evolution in research approaches from the use of traditional data and models to the so-called big data revolution since they have become available (for more details see Appendix 3).

The use of classic data gathering methods, such as participatory observations (Thornton, Williams & Shaw, 1997) and non-participatory observations (Keul & Kühberger, 1997), has raised many questions regarding the researcher’s influence on the subject as well as the ethical concerns, along with data accuracy and data validity – the risk of the subject’s tailoring their behaviour and explanations, although subconsciously, to the presumed expectations of their observer-companion (Hartmann, 1988; Shoval & Isaacson, 2007). Moreover, remote observation, though providing an objective snapshot of the visitor’s behaviour, cannot, by its very nature, reveal the motivations underlying the activities thus documented, and are incredibly time-consuming, expensive and labour-intense (Shoval & Isaacson, 2007; Shoval, 2008).
While space-time budget techniques aim at systematically recording, retrospectively, the way in which individuals occupy their time in space over a given period, they have several disadvantages as a research toll, most of which are rooted in the fact that they require the direct engagement of the subject in the process of data collection throughout the entire experiment (Thornton et al., 1997). Based mostly on questionnaire-based re-call travel dairies (Debbage, 1991), self-administered travel dairies (Fennell, 1996; Xia, Zeephongsekul & Arrowsmith, 2009), or site-based face-to-face interviews (Smallwood, Beckley & Moore, 2012; Bujosa, Riera, & Pons, 2015), the space-time technique has all the advantages of questionnaire type surveys: it is relatively cheap, provides comparatively large samples, and affords the speedy collection of data and reliable analysis.

The third group of studies is relying upon land-based tracking (time difference of arrival (TDOA), Alge timing system), satellite navigation (global positioning system (GPS)), or hybrid combinations between both (assisted GPS), seeking to reap the benefits of each, while minimizing their various disadvantages (Shoval & Isaacson, 2007). O’Connor and Zerger and Itami (2005) identified an advantage of the Alge system over other systems, as its non-invasive nature and the ability to tag many hundreds of people each hour using unique identifiers. In addition, the transmitters are relatively affordable, hence some loss of hardware is acceptable. A GPS as a next in line consists of a series of satellites, which orbit the earth broadcasting signals, which are then picked up by a system of receivers that can determine their exact location, nowadays built in our mobile devices. Since the early studies using GPS tracking technologies by Shoval and Isaacson (2007) and Shoval (2008), this results in high resolution, detailed and extremely accurate data, which makes them more suitable for micro-level investigations, especially in overcrowded touristic sites. That overtakes the feedback that can be gathered through travel diaries or post-travel surveys (Edwards et al., 2010), due to memory issues - thus replacing personal observations and notes. Most research in combination with classical GPS devices (Bauder & Freytag, 2015; Shoval et al., 2015) or GPS-based smartphone applications (Yun & Park, 2015), for complementary tool used surveys to provide insight behavioural qualitative content (about trip itself, purpose and experiences) in relation to detected movements to exceed this limitation. For instance, questionnaire-based surveys (Bauder & Freytag, 2015; De Cantis, Ferrante, Kahani & Shoval, 2016; Pettersson & Zillinger, 2011), semi-structured interviews (Edwards & Griffin, 2013), real time phone short message services (SMS) (Birenboim, Reinau, Shoval & Harder, 2015; Reinau, Harder & Weber, 2015), overview cameras (Pettersson & Zillinger, 2011), and on-site cameras (Edwards et al., 2010). Main limiting factors in these combined methods are the possibility and handiness of the technology, which is budget-constrained, as well as possibility of subject’s conscious behaviour.

Over the past decade, with rapid growth in information and communication technology (ICT), increasing everyday usage of portable devices like smartphones, access to internet, and use of social media, users have generated digital footprints. All available data due to large geotagged datasets typically contain information of activities or processes linked to the
space and time where they occur collectively converts into the so-called “big data”. Broadly, there are two types of footprints: active and passive (Girardin, Calabrese, Fiore, Ratti & Blat, 2008). Passive tracks are left through interaction with an infrastructure, such as a mobile phone network (Raun, Ahas & Tiru, 2016; Zhao, Lu, Liu, Lin & An, 2018) or Bluetooth tracking technology (Versichele and others, 2014), that produces entries in locational logs. The low cost and high availability of the fourth group of digital space-time traces challenged researchers to the volumes of data that was never accessed before, and simultaneously overcome the limitations of the data collection and analysis problems of third group studies that were grounded by emerging ICT.

Active prints contrarily come from the users themselves when they expose locational data in photos, online reviews, comments, and sensor measurements (geotagged social media data). Fortunately, the fifth group of studies all together depends on various data-mining techniques, that interprets user-generated content from web sources, for instance Flickr (Girardin et al., 2008; Kádár, 2014), Twitter (Chua, Servillo, Marcheggiani & Moere, 2016), and TripAdvisor (Knežević Cvelbar, Mayr & Vavpotič, 2018). Still, the analysis and visualisation of these studies are meant to complement and not replace traditional surveys and other means of data collection (Girardin et al., 2008). Despite demanding cracking techniques studies are promising, there are still several challenges to overcome in respect to limited sampling, ethical concerns and data validation.

Furthermore, latest research in tracking technology is pursuing the direction of personalized location-based mobile tourist trip planning systems (Mikhailov & Kashevnik, 2018) and future prediction of tourist movements (Zheng, Huang & Li, 2017). However, as with any emerging technology including recent visualisation techniques alike face tracking, video and images techniques, tourism researchers are still experimenting to determine the limits of its application to leisure and tourist activities.

To the best of my knowledge, research on visual mapping of visitor flows in tourism involving geographical area of Slovenia was up-to-date done for the capital city Ljubljana (Ribič, 2018), city-destination Škofja Loka (Miklavčič, 2017), and recent paper by Knežević Cvelbar et al. (2018) including Slovenia in their regional map of North-East Adriatic region, with the most repeatedly visited flow Ljubljana – Bled. The study of Miklavčič (2017) was the only research study based on in-depth interviews, the other two used data-mining techniques. Accordingly, this paper represents the first SVFs mapping dedicated exclusively to the Chinese tourist market in Slovenia only.

1.2 Existing research on Chinese segment specifics

Good management of tourist destinations can be boosted by understanding the spatial patterns of incoming visitors travelling for various modes of travel. As China has become one of the considerable tourist world markets in the last 20 years, there is significant number of studies focusing on the Chinese tourists in particular analysing their demographic
characteristics and behavioural specifics motives to travel and habits, preferences towards food, accommodation, types of travel arrangements and destinations, additional tourist offer, purchasing preferences, and many more.

Due to Chinese market rapid growth, understanding of the Chinese outbound tourism market including news trends (UNWTO & ETC, 2013) suddenly became important and pointing out successful practices and solutions (UNWTO, 2017) in order to get the portion.

Minimal research was conducted specifically in the Central-European nor Balkan region, among them, Raspor and Lacmanović and Stranjančević and Bulatović (2016) with help of conducted surveys in detail examined preferences, characteristics, and trip motivation of Chinese tourists in Slovenia and compared them to Montenegro. The most attractive places in Slovenia visited by Chinese tourists are: the capital Ljubljana, the lake town of Bled and the Postojna Cave. Another study by Raspor and Kobal and Rodič (2012) examined factors of satisfaction in respect to tourist offer in Slovenia.

The internet plays an important role in promoting China’s outbound tourism. Word Slovenia was 22,400 times mentioned in number of blogposts back in 2011, whereas the top photo motives reflected remains the same: Lake Bled, Ljubljana, Postojna Cave (UNWTO & ETC, 2012). Similarly, the country’s name appeared 6,016 times in WeChat articles and 431,133 Weibo posts in 2017, including Piran, Koper and Maribor among most discussed cities (ETC, 2017).

1.3 The St. Gallen model for destination planning

Destination planning and management has been a subject of exploration for more than three decades, while in the recent years it appears as though the research field has reached a point where the past work was transformed into development of comprehensive models of limited explanatory power, particularly when they have to stand the test of transfer from research to practice. Beritelli et al. (2015, pp. 16-17) name the concept that currently dominates our perception of a destination as a supply-dominated perspective “the amalgam” – the mixture of elements essentially driven by theories explaining economic structures in given geographical spaces, resulting in a creation of visitor attractive points, on alleged need to coordinate the services provided in order to “produce” a possibly continuous customer experience, and thus the attempt to imitate the corporate tourism services model: set on collaboratively networked community, with the goal of influencing increased competition in changing the market from the buyers’ market into the sellers’ market.

This predominant blend of views on the majority of destinations worldwide implies that: 1) visitor’s experiences and the services provided are mixed in a sort of collage, 2) that everything and everybody has to be considered in trying to 3) commercialize and promote all actors and offers as a single system, 4) for one territory, 5) accordingly represented by one organization that coordinates all the processes and the involved parties.
In sum, authors Beritelli et al. (2015) posit the following critical prepositions:

- In today’s practice and research, destination management is perceived of as a static function because it is comprehensive and simultaneously seeks perfection and agreement of all included parties in a world of homogeneously stable market segments.
- To date, destination management focuses too much on the destination’s potentials and thus on the supply side.
- If demand in mentioned is presented in the terms of markets, both changes in visitors and their respective behaviour are ignored because this task seems extremely complex and too labour-intensive.

Meanwhile, the new approach presented by Beritelli et al. (2015) is in contrast to previous models conceptualizing destinations in static and self-governing ways, identified as “repetitive, homogeneous, and significant for business movement of the visitors, where tourists emerge at different points in time and in different spaces, and they develop at individual speeds (p. 36).” Accordingly, visitors are on the move at different times in different flows, depending on the length of their stay and their mobility, which clearly illustrates the constant movement of the tourists and livelihood of the real tourism flow concept.

The model originates very practical with observation how tourists of different kinds fuse as flows of visitors and activate the same number of dynamic supply networks based on different resources at different points in time, and by its very nature connect these flows to both, demand- and supply-sided, network systems. Destination is in this manner a demand-driven rather than a supply-driven construct in the sense that the sum of individual visitor activities in space constitutes the destination, in which several changing roles and responsibilities of actors can be found, besides there are several variable areas that can be analysed and managed (Beritelli et al., 2015, p. 31). In sum, authors present the three changing areas, making this model a more suitable concept of destination: more reasonable, practicable and fast applicable.

1.3.1 Basic principles

Introduction of the model is based on the four sets of basic SGDM principles (Beritelli et al., 2015, pp. 32-43). From the perspective of those who manage the destination originate Principles I, that the destination space must be regarded as the sum of different travel and thus visitor flows, which should be preferably synergetic. Along these flows, tourism providers benefit from the visitors in different ways by establishing either implicit or explicit service chains or consequently business systems.

Set of Principles II describes the concept of strategic visitor flows, where every SVF: 1) consists of its own flow of visitors, 2) has a spatial and temporal distribution and 3) involves its own dynamics (and thus also changing speeds) (Beritelli et al., 2015, p. 47). The
aggregation of individual visitor behaviour and customer journeys in SVF does not, however, imply that individual visitors can be perfectly and mutually allocated exclusively to a single flow. Accordingly, visitors are on the move at different times in different flows, depending on the length of their stay and their mobility. In order to point out activation of supply mechanisms by visitor flows as well as the places where visitors stay and spend money, SVFs can be visualized on the maps. Some flows are strategic in character because they are stable, reappearing and well-catered to on the supply side, while others account for weak signals that point out to potential new opportunities for innovation and for capitalizing on in the future.

In reality, destinations not only consist of a number of important and well-functioning SVFs with high frequencies, but they also many times attribute numerous NSVF s that are comparably significantly smaller in visitor numbers, but still guarantee a stable demand for limited time and a small group of suppliers. These by nature strategic flows (because of their relevant impact across the destination) mostly occur over short period of time and in highly concentrated spaces, and as a rule always relate to businesses that involve special activities and small communities of visitors that are particularly homogeneous in their motives and behaviour. Hence, special interests (e.g. camping, history) or special events may motivate these flows (e.g. weddings, religious events), in which the supply networks have specialized by its very nature. Regardless of their limitations, the consistency of these NSVF s makes it worth perceiving them in the view of feasible future developments and links with other SVFs. First niche flows can be detected during this particular procedure, but actors thoroughly describe them later on when all the maps descriptions are joined.

Third set Principles III illustrates the concept of variable geometry, which ability to adapt to unstable conditions is originally borrowed from the aviation. Because economic areas need to be adaptive too, the term has also been transferred and used in economic and political contexts likewise (Beritelli et al., 2014). The basic idea is that heterogeneous context on the supply side can be visualized in space by implementation of the model’s steps 1 and 2. Thus, in the destination context, the as “space of flows” results from overlapping all individual maps depicting SVFs on a single map.

In particular, distinguishing the flows and activity spaces in the variable geometry shows (Beritelli et al., 2015, p. 49):

- That some spaces and flows are significant for several systems (multi-valued spaces) (i.e., attractions).
- That some spaces take no part in any flow (i.e., spaces without any strategic significance, non-touristic spaces).
- That some spaces display unused synergies and potential for development.
- The total portfolio of current and future flows for the destination space, as well as their relation to its different parts.
The set of Principles IV describes the importance of SFVs as linkage to one or more demand networks, as well as they represent stable and developed supply network. Both networks are either directly linked to one another or supported by an operating unit equipped with coordination, brokerage, and supporting competences called portals. Demand and supply analysis for a specific SVF provides a fundamental understanding of reliance and functional mechanisms that motive and shape repetitive streams. The marketing and management processes provide an overview of activities and responsibilities for particular SVF, which enables suitable analysis of existing and unknown synergy potentials, besides drawing conclusions for the future distribution of functions and responsibilities for single and across the SVFs.

Overall, this versatile and flow-based view of the destination space depicts how insignificant in advance determined political and administrative borders really are from the view of an individual tourist. SVF in this case represents the optimal unit for marketing and management of the destination at an aggregate level. Most importantly, it synchronously reflects destinations’ demand and supply sides, while accounting for temporal variations as well as spatial conditions. Designers of a model clearly point out that fundamentals and principles do not constitute a revolution but rather an evolution of destination management, while the SGDM approaches the phenomenon from both an academic and practical perspective, originating from the areas of tourism research that have been neglected or overlooked (Beritelli et al., 2015).

1.3.2 Six-step approach and key activities

Founders of the SGDM model Beritelli et al. (2015, pp. 44-66) as a guide propose a six-step approach that includes the following key activities:

1. Identification of visitor flows and defining, drawing, and describing SVF.
2. Discussing the variably geometry by overlapping individual SVFs and assessing the portfolio of SVFs.
3. Analysis of demand and supply networks and reconstruction of its main levers and driving mechanisms.
4. Description of marketing and management processes for individual SVFs, with allocation and distribution of tasks along the process.
5. Arrangement of strategies and actions among the corresponding organisations and actors, along with assigning resources according to the comparable competences.
6. Continuous and moderate update of the SVFs, the marketing and management process and the use of resources, and facilitate the process on the destination.
Because of the time constraint and extent of the work required, this study will enforce only the first two models’ steps, step 1 and 2.

1.3.2.1 Visitor flows and SVFs

The central tool for sketching the SVFs is an A3 format topographical map, which portrays an extensive picture of an existing or potential destination and its surrounding areas. On purpose it is chosen to portray space beyond the political and administrative borders of existing destination definitions, in order to open up the range of drawing visitor flows and also capture non obvious SVFs outside limits.

Visitors shape a destination with their own presence, hence they are not owned by any service provider or institution. Visitor flows are drawn on the map: where guests come from, where they go, where they stay and what they do there, and where they go on to. At the same time, it is helpful to define the following questions for every SVF on the side of the map: 1) who the guests are, 2) where do they (geographically) come from, 3) what is their motive and why they come, 4) what do they do, 5) how numerous they are, 6) when does this happen (time-wise), and 7) how far along the life cycle. In this way, we try to identify whether guests of particular flow can be described a homogeneous group in terms of their motives and their origin. The seasonal nature enables a first rough assessment of flow-related frequencies and thus, a flow’s strategic significance.

Drawing maps from visitors’ perspective allows actors to define their own perspective of tourist spaces and activity patterns as well as their own position within those spaces. These were previously hardly accessible and recognizable, due to well-rooted territorial boundaries.
Beyond these patterns, the following three aspects should be taken into review for their practical implications: day guests (how to attract potential day-trip tourism?), local guests (guests from the region, do their motives differ from other guests?), and guests from neighbouring destinations (how to initiate an overabundance of guests from these destinations?). Besides them, there are five basic travelling patterns of visitor activity that help reconstruct and illustrate examined space from the point of view of tourist flows.

Table 1: Basic activity and travelling patterns

<table>
<thead>
<tr>
<th>Pattern</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Stay-put</strong></td>
<td>Guests arrive at the destination with the intention to stay there. This pattern corresponds to the traditional understanding of how a destination space is marked, even though guests do not always behave like this.</td>
</tr>
<tr>
<td><strong>Gateway</strong></td>
<td>The destinations space serves as a temporary experience space from which guests discover other, usually bigger (neighbouring) spaces. Usually, guests only stay for a short period of time.</td>
</tr>
<tr>
<td><strong>Hub-and-Spoke</strong></td>
<td>Guests usually visit the destination with good central location along convenient infrastructure in order to use it as starting point for their day trips to other spaces.</td>
</tr>
<tr>
<td><strong>Arranged Touring</strong></td>
<td>Guests visit the destination as a part of organized round trips, often provided as standardized service packages (tours) by tour operators or travel agencies.</td>
</tr>
<tr>
<td><strong>Freewheeling</strong></td>
<td>Guests spontaneously make decisions along their travels, based on information received online, in the travel guides and mobile applications. This increasing phenomenon significantly extends guests’ travelling scope and implies that suppliers are able to influence instinct decisions to their advantage. Thus, this pattern is not characterized by classing tour operating.</td>
</tr>
</tbody>
</table>

Source: Beritelli et al., 2015, p. 48

1.3.2.2 Variable geometry and portfolio

Overlapping the maps enable decision makers to understand why certain things always worked well in their destinations and some were never really picked up. Moreover, it also allows a rough portfolio discussion tackling the number and richness of SVFs, their lifecycles and seasonality. This enables them to acknowledge that visitors’ more realistic perspective has no boundaries, the size of destination space itself is usually much bigger (or possibly much smaller) than assumed before, depending on the SVFs. Thus, at this point actors frequently recognize the actual number of visitors and the business discussed before.
Variable geometry also point up two more applications: destinations need to deal with the tourism of neighbouring destinations and individual service providers, connected to several SVFs, have to fulfil different requirements and solve numerous problems for each and every enlisted SVF.

1.3.2.3 Networks and levers

The third step involves analysis of demand and supply networks with understanding what are the divers of visitors’ behaviour and what do visitors actually do on their trip, where do they stay, what they consume. First time recognition of demand networks and their corresponding market mavens can be sometimes an overwhelming challenge. Traditional market experts can be recognized as tour operators, travel agents, and traditional tourism printed media, while opinion influencers, personal networks and social media can be hardly sighted. Especially knowing the fact, that they rarely not travel as a part of a group or are not a part of decision-making process driving their travel motives (e.g. business travellers).

Considering supply networks and systems heads is on the other hand easier to identify, while they are located in the destination itself and hold together the whole range of products and services that are part of SVFs – without them the flows as such would collapse. Authors highlight four types of system heads, thoroughly presented in Table 2.

Table 2: Four types of systems heads

<table>
<thead>
<tr>
<th>Type of System Head</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Classic system head</strong></td>
<td>Is the main provider in a supply network or even considered as a main attraction itself. The other supplementary providers and SVF product and services components entirely rely on this system head. In case of its evaporation also the whole supply network would disappear.</td>
</tr>
<tr>
<td><strong>Multiple system head</strong></td>
<td>At least two compatible tourist attractions or business providers are noted in complementary roles.</td>
</tr>
<tr>
<td><strong>Focal system head</strong></td>
<td>Represent a group or an association of service providers that are homogeneous as possible in the kinds of SVFs they cater.</td>
</tr>
<tr>
<td><strong>System maker head</strong></td>
<td>In new and far undeveloped supply networks are ideally driven by a coordinating organization (such as DMOs), which are able to develop new infrastructure or service entities.</td>
</tr>
</tbody>
</table>

Source: Beritelli et al., 2015, pp. 52-53
1.3.2.4 Marketing process and task sharing

After closer look on individual SVFs and discussion of the essential mechanisms encouraging them, next important step is description of the marketing and management process together with accurate distribution of functions along the process. Addressing specific tasks and authorizing their responsibilities to related networks and actors allows tourist enterprises, public sector, in addition to coordinating organizations to realize that they are unable to supply and fulfil all the functions required of an SVF exclusively. During the ongoing discussion, outcome of the present step is the marketing process table with definitions of key elements and process steps: SVF title, systems heads, market mavens, and SVF system minder. The final one recognized as the person delegated per single SVF and all the responsibilities connected to its processes and current plus future actions.

1.3.2.5 Negotiations and arrangements

The individual SVF maps, the variable geometry, the networks and inter-dependencies and marketing process table recognised in the previous steps provide the cornerstones for an objective and overall analysis and conception of a destination's market-relevant subsystems. In step 5 actors base their attention on individual SVF or a few selected ones that only concern a subset of all destination actors, meaning that several flow-based discussions take place in very specific groups of decision makers interested in limited SVFs, and become more specific, differentiated, and relaxed.

Service providers no longer just regard themselves as single enterprises but rather as a part of one or several business systems, even an essential part if they are an SVF's system head, and align their business logic accordingly. Public institutions are, on the other hand, able to make selective decisions about tourism location development and promotion based on the policy priorities and intentions, as they can hand out stakeholders more specific and project-binding tasks. Last, coordination institutions (like DMOs) have the mechanism to openly articulate that they are unable to do everything for everybody, and start focus on individual activities along the marketing process.

This principle of SVF-based country coordination mechanisms fundamentally distinguished the SGDM's procedures and processes from previous approaches and claims new one. Authors propose three basic coordination forms to structure and guide, based on preferred approach of local decision makers: 1) independent focal organization with independent board controlling critical resources (finance, organization), 2) steering committee with members of the different organizations, empowered to make decisions, and 3) transactional agreement, system of bi-/multilateral contacts, for instance sharing costs at the project roll out.
1.3.2.6 Destinorama

Following the SGDM model's logic, the prior five steps would regularly be repeated every three to five years, when updating or reviewing the destination planning and development strategy. In the last step 6 authors propose adjustment of strategic planning more relevant to the development on the destination level, while it is unrealistic that all actors have to contribute to the same solution for the same problem at the same time. Such form of planning allows for constant revision and reconceptualization at the SVF-level: SVFs develop in parallel, under different demand conditions, in different ways, at a different pace, and driven by different organizations and institutions that follow their own interests that do not necessarily apply to all tourism flows. Therefore, Beritelli et al. (2015) propose that the common planning must be highly independent among individual SVFs with designing a destinorama – a document that defines the distribution of functions and tasks for the next five years and serves as a tool for actors to comply with, including SVF maps for visualisation, variable geometry, and marketing process table in order to track the joint achievement.

Overall, this new process should satisfy following three assumptions:

- **Free access:** to all actors in the destination to current overview of all SVFs to create transparency and objectivity in destination planning.
- **Shared understanding:** empowers actors to elementary understand the logic behind SVF maps, as well as enables them to supplement, adapt, or correct individual SVF or their marketing process table accordingly. More than that, actors should be able to recognize and understand their own position and function in the process, as well to realize direct implications for their own businesses, which should be consulted with others.
- **Moderated learning:** ideally, responsibility for moderation, guidance and updating this overview based on actors’ feedback should be taken over one organization such as DMO, the local municipality or regional authority, or any other enterprise with overall long-term overview of the destination.

Therefore, destinorama positions all actors in the overall picture of destination management and planning, as well as serves as a till for not only current but also and future directions.

1.3.3 Implementation in the practice

In steps 1 and 2, the actors identify the existing destination’s SVFs and identify introductory understanding of the overall portfolio of business-admissible flows with the help of the variable geometry. The identifications of the flows start with sketching the maps and writing the initials notes in the relevant tables next to the maps. Frequently, actors designing maps mark large spaces with big circles in which tourists are supposed to move (the so-called “amoebas”) rather than determining flow-specific paths (“arrows”) and points of attraction. Avoiding these not self-explanatory large spaces indicating that actors are trying to combine
several different types of tourists (and though SVFs) on a single map. Also, simply combining any previous product lines from earlier strategy processes and drawing them on SVF map is incorrect. For example, in alpine destinations, the first draft of a map frequently contains single SVF referring to all the “skiers”. When it is really a mix of several groups, including locals, different kinds of overnight guests (who are also involved in several other activities), second home owners, variant skiers, and others. All these groups move in different spaces and display different behavioural and consumption patterns, as well as also activate different business systems.

The single day represents the basic unit the individual tourists use to plan their trip. In doing so, the new flow-based perspective recognizes that overnight visitors might be a part of multiple SVFs on different days. Therefore, in drawing maps actors assess one visitor day as a point of reference. It is desirable that actors in the process identify as many SVFs as possible. The wide spectrum of flows helps determining whether the sketched visitor paths are realistic as well as significant for destination in economic terms. Especially for the first drafts of maps, many sketches and flow’s details descriptions are insufficient. As the process continues, maps constantly evolve and adjust – they become more focused and more specific. The ultimate importance and final number of the individual flows depends on actors’ ability to recognize them, while some of them were never presented before.

Drawn maps after the first two steps should be clearly defined and marked with arrows, thus outline is understandable also to the first-time reader. In addition to space, time is another important reference. Participants must place each flow in a precise time period and decide on its duration. This helps generate later discussions around optimization of capacity usage, or it helps to describe new potential SVFs. Graphical representations serve as the superior tool in keeping the actors from falling into their old mental models, which are supply-oriented and rooted in all-inclusive destination construct. A good indication of the gatheredbehaviours are labelled terms with general descriptions of visitor groups such as “families”, “business tourism” or “culture”. At the same time, if we start by defining groups even before drawing the maps, there is a danger that SVF maps will end up dictating pre-existing services and theme worlds. This behaviour is exactly opposite what is the aim of the new SGDM approach, to uncover and account for the actual tourist behaviour in space.

In steps 3 and 4, actors focus on identifying systems heads and the market mavens and strive to complete the detailed marketing process table with distribution of tasks per SVF, including tackling open questions and unmet responsibilities. Marketing process table helps actors to understand their flow-based business system and the fact, that some of the SVFs are stable and functioning without additional supervision. In reality, destinations not only consist of a number of important and well-functioning SVFs with high frequencies, but they also many times attribute numerous NSVFs that are comparably significantly smaller in visitor numbers, but still guarantee a stable demand for limited time and a small group of suppliers. These, by nature strategic flows (because of their relevant impact across the destination), mostly occur over short period of time and in highly concentrated spaces, and
as a rule always relate to businesses that involve special activities and small communities of visitors that are particularly homogeneous in their motives and behaviour. Hence, special interests (e.g. camping, history) or special events may motivate these flows (e.g. weddings, religious events), in which the supply networks have been specialized by its very nature. Regardless of their limitations, due to the consistency of these NSVFs it is worth perceiving them in the view of feasible future developments and links with other SVFs. First niche flows can be detected during this particular procedure, but actors thoroughly describe them later on when all the maps descriptions are joined.

In steps 5 and 6 flow-based discussions allow more meaningful participation of relevant representatives and service providers from surrounding areas based on each individual business system. Actors should acknowledge that the intention is not to re-shape or overinvest in functioning SVFs, but rather to unify their ambitions and realistic capabilities. Furthermore, it is important that actors consider most suitable coordination mechanism.

For DMOs in particular, this can result in a new SVF-based action plan. In negotiating new tasks and projects, involved tourist enterprises should decide on their level of involvement together with their financial contribution. The ideal group size to work simultaneously on destinarorama is about 12 people, in order to discuss things with those actors who are of central significance for a certain SVF.

2 STUDY ON CHINESE TOURISTS IN SLOVENIA DURING 2010-2019

2.1 Chinese are a global trend

By the last reports, China in particular continues to drive global outbound travel and soaring Chinese arrivals to Europe continue to support the region’s tourism expansion. Some of the factors with a positive impact over the next years include China’s growing middle class with higher purchasing power, a depreciating currency, improving air connectivity, travelling being seen as an important part of the experience-oriented lifestyle of young consumers, upgraded visa procedures, and more Chinese-friendly destinations. Chinese tourist arrivals to European destinations increased by 6% in 2018, accounting for 14% of the market’s outbound travel (ETC, 2019a).

In 2018, the European Union (EU)-China tourism year presented a unique opportunity designed to attract more Chinese free independent travellers (FITs) for discovering new European destinations. Crucially, in a positive reflection of this initiative, forward bookings from China to the EU for January-April 2019 are up by 16.9% compared to 2018, well ahead of the 9.3% increase in Chinese bookings to worldwide destinations (ETC, 2019b).
In such manner, why should Chinese tourists matter?

- Number one tourism spenders in the world: Chinese expenditure on travel services in the EU are expected to increase by EUR 3 billion until 2020, which is an average yearly growth of 10% since 2016 (Eurostat, 2018).

- Fastest growing tourism source market volume-wise in the world: the number of nights spent in the EU by tourists from China has more than tripled over the last 10 years, reaching nearly 25 million nights in 2016. With 19% a year on average in the period 2012-2016, equivalent to some 3 million additional nights a year. Tourism from China has risen more than that from other major non-EU countries such as the USA, Russia or Brazil (UNWTO, 2018a). The share of Chinese tourists out of the total nights spent by tourists coming from outside the EU was almost 6%, for Slovenia 3.4% (see Figure 2).

Figure 2: The share of Chinese overnight stays in the total number of overnight stays by non-residents in EU-28, 2016 (%)

![Bar chart showing the share of Chinese overnight stays in the total number of overnight stays by non-residents in EU-28, 2016 (%)](image)


- A story of a maturing and segmenting market, segmentation is the main characteristic of the Chinese outbound market: like in the context of this paper, many millions of Chinese living in the multimillion cities are still ready to take their first overseas trips, joining group tours and visiting the biggest cities and most popular destinations, predominantly in Asia. When travelling to Europe, they are more likely to visit several countries at once with the main aim to be able to gain bragging rights. The number of more experienced overseas travellers continues to increase, however, as Chinese travellers take their second, fifth or tenth trip overseas – and, in the process, become more confident...
travelling on their own and pursuing more unique and personalized experiences. These experienced travellers are more likely to travel as FITs in small groups of couples, families, friends or colleagues, eschewing typical Chinese package group tours. All these segments are niches, but in China niches tend to include hundreds of thousands of potential tourists (COTRI, 2017).

- Specific structure of the Chinese tourism industry: five major tour operators where the state has a major stake in the holdings of the company, dominate travel. However, since 2016, Ctrip, Qunar and AliTrip/Fliggy are the three largest OTAs by transaction value, accounting for 80% of the total market share. For the outbound market alone, the company with most outbound customers was Tuniu in 2016 (23.2% market share). OTAs offering complete tours as well as individual module are on the rise with direct contact to service providers in Europe. This gives more flexibility to the traveller (COTRI, 2017).

2.2 Chinese in Slovenia

The Chinese outbound tourism to Slovenia has experienced rapid growth and development since 2004, when Chinese government arranged the so-called “Approved destination status” policy for additional 35 countries including Slovenia, for allowance to holiday travellers to visit the destination on group packaged tours (UNWTO, 2017, p. 24). SORS (2019a, 2019c, based on data for the years 2010-2018) over the last 9 years recorded a total of 335,844 tourist arrivals and first time over half a million (521,208) overnight stays by Chinese tourists, 136,442 overnight stays in 2018 alone. Increasing growth of Chinese market over the years is presented in Figure 3 below.

The share of Chinese overnight stays in the total number of overnight stays has been constantly increasing since 2010 – a 788% increase in overnight stays from 2010 to 2018, and almost 980% in tourism arrivals respectively in the same period.
Figure 3: Chinese tourist arrivals and overnight stays in Slovenia, annually, 2010-2018

Table 3 below presents a closer yearly overlook on the Chinese tourism activity in Slovenia in the period of last 5 years, 2014-2018, when together 276,153 tourist arrivals and 417,494 overnight stays in total were generated.

SORS (2019c) published more than 5.9 million tourist arrivals and almost 15.7 million overnight stays were firstly recorded in Slovenia in 2018. Foreign tourists generated more than 4.4 million arrivals and over 11.2 million overnight stays. In 2018, accordingly, the highest numbers of tourist arrivals and overnight stays of Chinese tourists in Slovenia ever were recorded; more than 136,000 registered tourist arrivals, which is 25% more than in 2017. Chinese tourists spent almost 136,500 nights, which is 38% more than in 2017. This means that compared to 2017, in 2018 on average every day 103 more Chinese tourist overnight stays were recorded (256 more Chinese tourists stayed over in 2018 than in 2014). Table 3 shows that tourists from China were the ones who generated almost 2% all foreign tourist arrivals in 2018, which set China on a 15th ranking place among listed 42 countries, and on a 3rd place by tourists from non-European countries, after Republic of Korea (3.29%) and USA (3.13%). The highest number of overnight stays by tourists from non-European countries generated by tourists from the USA (2.81%), followed by Israel (2.12%), the Republic of Korea (1.54%), and China (1.22%) on the 4th place. Thus, China ranked on the 21st place in overnight stays of all listed foreign tourists visiting Slovenia.
Table 3: Chinese tourism activity in Slovenia, annually, 2014-2018

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourist arrivals</td>
<td>26,949</td>
<td>42,076</td>
<td>50,408</td>
<td>69,549</td>
<td>87,171</td>
<td>125.34</td>
</tr>
<tr>
<td>Rank</td>
<td>25</td>
<td>21</td>
<td>18</td>
<td>15</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>Market share of foreign tourists (%)</td>
<td>1.01</td>
<td>1.39</td>
<td>1.48</td>
<td>1.74</td>
<td>1.97</td>
<td></td>
</tr>
<tr>
<td>Overnight stays</td>
<td>42,998</td>
<td>63,775</td>
<td>75,729</td>
<td>98,550</td>
<td>136,442</td>
<td>138.45</td>
</tr>
<tr>
<td>Rank</td>
<td>28</td>
<td>25</td>
<td>23</td>
<td>22</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Market share of foreign tourists (%)</td>
<td>0.63</td>
<td>0.85</td>
<td>0.91</td>
<td>1.02</td>
<td>1.22</td>
<td></td>
</tr>
<tr>
<td>Average stay</td>
<td>1.60</td>
<td>1.52</td>
<td>1.50</td>
<td>1.42</td>
<td>1.57</td>
<td></td>
</tr>
</tbody>
</table>

Source: Adapted from SORS, (2019c).

On average tourists spent 2.6 nights which equals the average number of nights spent by all tourists in Slovenia in 2018. Compared to 2017, Chinese tourists prolonged their average stay by 10%, meaning that in 2018 travellers on average spent in Slovenia 1.57 nights. Top cities by Chinese tourists in Slovenia for their overnight accommodation in 2017 were Ljubljana, Bled, Piran, Maribor, and Kranj; mainly they used hotels and private accommodation (SORS, 2019a). 113 out of 219 municipalities did not report any encounters with Chinese tourists.

The share of Chinese tourists whose travels were organised by Slovenian travel agencies has been constantly increasing since 2015; more than 20% of tourist arrivals in 2017 and more than 29% of Chinese overnight stays (SORS, 2019b). There is no available particular data on same-day Chinese visitors and Chinese passenger tourists by different kinds of transport.

Figure 4 below represents the seasonality variation between the months. As seen, the most popular months for visiting Slovenia by Chinese tourists are October (2018), May (2017, 2018, 2019), June (2017, 2018, 2019), August and September (2017, 2018) which points on the pre- and post-summer season as important period for visitation. Generally, Chinese tourists tend to visit Slovenia preferably from April to October.
In the first seven months of 2019 Chinese tourists generated more than 55,500 arrivals and more than 86,000 overnight stays or 21% more arrivals and 31% more overnight stays than in the same period in the previous year. January-July 2019 average stay was 1.55. Comparing the numbers and the annual growth, year 2019 will be another record year regarding Chinese tourism statistics ever recorded in Slovenia (SORS, 2019d).

Similarly like already mentioned, during 2014-2018, the highest number of overnight stays of all Chinese tourists was recorded in the capital Ljubljana, followed by the mountain resorts and urban municipalities. Respectively, in May-July 2019, Ljubljana recorded more than 22,000 overnight stays (40% of all Chinese overnight stays), followed by mountain resorts, where almost 14,000 overnight stays were recorded (25% of all Chinese overnight stays). Urban municipalities in the same period recorded over 18% of all Chinese overnight stays, the rest was distributed among other municipalities (8.9%), seaside resorts (4.5%), and health (spa) resorts (1.8%). 72% of all overnight stays were generated in hotels and similar accommodation establishments (SORS, 2019e).

Presented numbers might actually seem miniature compared to many of the other nations visiting Slovenia, also taking into account the movements of local Chinese, Chinese travelling from neighbouring countries, Chinese students studying and travelling around Europe, etc. Furthermore, moderately statistical numbers might be partially even excluding tourists from the records, for instance tourists using other accommodation options like Couchsurfing, staying with the relatives, or Airbnb if not reported by the owners, which means that overnight stays are probably even higher in the real terms.
Yet, nonetheless, the take away remains the same – numbers on Chinese tourists in Slovenia do show constant expansion that is year-after-year becoming more significant. Another interesting figure on consumption of Chinese tourists in Ljubljana is aligned with that statement. A survey conducted by Ninamedia in 2018 for Tourism Ljubljana (2018) shows remarkably higher (than probably assumed from the stereotypes about Chinese tourists) consumption rate of Chinese, spending an average of EUR 44 per day. The average consumption in Ljubljana was EUR 46.8 (excluding travel to destination and accommodation), and the Chinese even with tourists from the United Kingdom, and thus surprisingly surpassed tourists from Spain (EUR 38), Germany (EUR 37) and Italy (EUR 36). Positioning Chinese on the 5th rank among conducted non-European tourists in Ljubljana, after South Korea (EUR 60), Canada (EUR 54), USA (EUR 49) and Japan (EUR 47).

3 METHODOLOGY

The main tool for achieving outlined goals and meet the final purpose of this master thesis is the SGDM model by Beritelli et al. (2015). The empirical part of this paper consists of primary data collection with model-based implementation of the first two steps in the practice.

Ahead of practical implementation of the research, the development of interview-process and instruments took place, in order to insure consistency between interviews and thus increase the reliability of findings. During the process the necessity to translate the interview instruments into local Slovene language because of the language barrier was raised.

All developed instruments can be found in the Appendices (5-10):

- Interview Consent Form in English,
- Interview Consent Form (Obveščno soglasje) in Slovene,
- Interview Guide in English,
- Interview Guide (Priročnik vprašanj) in Slovene,
- Table Notes in English,
- Table Notes in Slovene.

Empirical research was done with the actors across Slovenia, mainly in the capital city Ljubljana, from May 2019 to June 2019. First Step 1 practiced one of the most commonly used methods in qualitative research as a sole method, individual form of the semi-structured interviews. The intent to tackle certain issues or experiences with used form, the main advantage is that interviewees’ voice and thoughts are heard, while interviewer asking occasional mix of open-ended and forced-choice questions and get involved in an intense conversation in order to cover the main research objectives (Smith, 2010, pp. 109-123). Interviews to some extend allowed some flexibility in the asking questions.
In practice, well-informed and reliable actors are crucial to provide first realistic draft of SVFs as a valuable starting point. Taking also into consideration that there is a very specific part of the business dealing with Chinese tourists at the first place, existing pool of appropriate actors in private and public sector was already limited. Participants’ selection was carefully maintained, representing the main interest groups at the country level of tourist destination Slovenia. Sample participants are directly or indirectly connected to the tourism sector of Chinese tourists in Slovenia, in order to provide first-hand information about their involvement into several travel flows and that is beside their openness to the new approach essential in the process of variable geometry. As Beritelli et al. (2015) propose, my interview-process included actors from private and state-owned sector, including experts working in the organisation or execution functions: tourist guide, travel organiser, sinologist working in the field, DMO, state owned attraction, entrepreneur, researcher, restaurant owner, association for education, association of travel guides, tourism delegate, native Chinese. Most of the participants are well experienced and preformed multiple roles mentioned above.

Before the process of interviewing, description of the events was clarified and consent forms were signed. As suggested by Bryman and Bell (2015, p. 509), the processed qualitative interviews were audio-recorded and later on transcribed. Once the primary data was collected, the process of analyzation cleared out the answers to the two research questions.

In order to better understand how repetitive and homogenous travel routes of Chinese tourists in Slovenia are, 19 actors were invited to participate in the research, but finally 9 in-depth interviews were conducted. In the interest to ensure full confidentiality and anonymity of the participants, recorded and written conversations with respondents are not append to prevent their direct exploitation. Considering their expertise in this niche segments, their personality could be easily disclosed because of the limited number of actors in private and public sector in Slovenia.

Model distinction, practical simplification and adaptation

The SGDM model originates very comprehensive but when it comes to actual realization there is no further practical directions or provided tools for implementation of the analysis itself. Designers of the model Beritelli et al. back in 2015 did present some practical implications which are summarized in the Chapter 1.3.3, but these were not sufficient and detailed enough for development of SVFs and NSVFs. As a consequence, it was mandatory to develop practical outline in order to prioritize decision criteria and enable execution of the process of tourism flows development covered by models’ steps 1 and 2.
Stage 1 involved identification of suitable actors, formulation and execution of interview process through identification of visitor flows and defining, drawing, and describing SVF. Stage 2 data validation process determinate the decision criteria for accepting individual SVFs, with repeated evaluation and modification by overlapping individual SVFs for both types of tourism flows – strategic and niche. The process of categorization was done without utilizing any software. In the last Stage 3 the assessment of the SVF map portfolio takes place in hand with development and the proposal of the new tourism flows until the clear variable geometry.

From the numerous day flows and their directions, next three features were recognized: 1) sequences are not the crucial factor nor they do not genuinely influence on the subject in this matter, for example if that the direction of the flow is Postojna-Ljubljana-Bled or Bled-Ljubljana-Postojna. The bigger picture also showed that the total travel pattern of a tourist (in the big majority) does not happen in one day, but it happens over one to five days. 2) Thus, the SDGM model’s one visitor day as a point of reference it is also not vital for this analysis. Correspondingly, content in this manner is the most important visible feature in this analysis, which will serve as a starting point to overall understanding of SVF mapping in Slovenia and conscious distinction from the SGDM model. When the capital Ljubljana might be used as a hub, or Brnik as an entry and exit point in/out of the destination (in the SVF 3 and 4), whereas main purpose of travel is business, the same reasoning under previous two points would apply here. 3) For the purpose of flow identification, one city location would not be marked several times as a part of the tourist flow but only once (nonetheless, the actual travel pattern on the map would not be influenced or mistreated).

Accordingly, vital criteria for extracting key information from the data collected were formulated. After recognising numerous tourism flows, this criteria were classified into hierarchy based on their importance (top-down): purpose, trip organization connected with type of package travel, business level for business guests, number of locations in the tourist flow itinerary, group size, and age group.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Variations of tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td>Personal, leisure</td>
</tr>
<tr>
<td></td>
<td>Personal, education</td>
</tr>
<tr>
<td></td>
<td>Business</td>
</tr>
<tr>
<td><strong>Package travel</strong></td>
<td>Pre-arranged</td>
</tr>
<tr>
<td></td>
<td>Customised package</td>
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<tr>
<td><strong>Business level</strong></td>
<td>Senior management</td>
</tr>
<tr>
<td></td>
<td>Middle management</td>
</tr>
<tr>
<td></td>
<td>Study groups</td>
</tr>
<tr>
<td><strong>Number of locations</strong></td>
<td>Top 3</td>
</tr>
<tr>
<td></td>
<td>Top 3 + more</td>
</tr>
<tr>
<td><strong>Group size</strong></td>
<td>Big group (30-55 people)</td>
</tr>
<tr>
<td></td>
<td>Medium group (15-25 people)</td>
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<tr>
<td></td>
<td>Small group (up to 15 people)</td>
</tr>
<tr>
<td></td>
<td>Business delegation (6-10 people)</td>
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<tr>
<td></td>
<td>Small business delegation (4-6 people)</td>
</tr>
<tr>
<td><strong>Age group</strong></td>
<td>Youth (16-25)</td>
</tr>
<tr>
<td></td>
<td>Middle age (26-49)</td>
</tr>
<tr>
<td></td>
<td>Senior (50-75)</td>
</tr>
<tr>
<td><strong>Frequency</strong></td>
<td>Most repeated</td>
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<tr>
<td></td>
<td>Highly repeated</td>
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<tr>
<td></td>
<td>Medium and stable</td>
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<td></td>
<td>Low</td>
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<tr>
<td><strong>Flow development</strong></td>
<td>Well-established</td>
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<tr>
<td></td>
<td>Established</td>
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<tr>
<td></td>
<td>Developing</td>
</tr>
<tr>
<td></td>
<td>New</td>
</tr>
</tbody>
</table>

*Source: Own work.*

When doing so, I have foreseen next influential factors regarding purpose, package travel (see Chapter Basic definitions), group size, age group and number of locations visited to distinguish Chinese tourists visiting Slovenia. Each and every one of them was taken into consideration, alike how group size criteria are connected with the mode of transport: bus/coach, mid-size bus, vans or mini-vans, or car. Another example is age group. China’s retirement age is 60 for men, while women who work in factories can retire as early as 50. Female public-sector workers can retire at 55. According to a reform plan, from 2018 the retirement age for women would be raised one year every three years while the retirement age for men would increase one year every six years. That means that by 2045, the retirement age for both men and women would be 65 (ECNS Wire, 2018). On the other hand, China’s pool of working-age people – ages between 16 and 59 – started shrinking in 2013 and is set to continue doing so, while by 2050, as much as a third of China’s population will be over the age of 60 (Chun Han & Liyan, 2015). Background information can enable the process of catering existing and new tourism flows better, when understanding the influencing policies or regulations shaping them.
4 IDENTIFICATION OF EXITING TOURISM FLOWS

In total, 9 interviewees drew 20 maps and filled out 37 tables. At the first glance more than 100 day-trip options were recognised, from which emerged numerous location-points in Slovenia and 14 destinations in the neighbouring countries.

Those 100 flows generate 9 groups of tourism flows, summed up into two kinds of nature – strategic and niche tourism flows, according to the SGDM models’ principles (see Chapter 1.3.1). A group of flows means the flows that share the particular set of tourist flow characteristics and geographical locations, but visitors were visiting them in a different time and order. For instance, these are three the most visited destinations in the region: Ljubljana, Bled, and Postojna. Between those destinations, there were visitors’ visiting Bled–Ljubljana–Postojna or Ljubljana–Postojna–Bled–Ljubljana. The group represents those three destinations with different directions of flows, keeping in mind not repeating the same locations visited twice as a part of one flow. All the flows identified on the destination are presented in the tables under belonging SVFs or NSVFs.

Majority of the maps and filled tables provided very relevant information, few were however insufficient to provide additional details. Particularly for the first draft, few descriptions are made without knowledge of the flow's details while it is not realistic that actors on different positions can hand over complete background information that thought can be easily identified. For most SVFs, we have to admit that we know much less about guest flows and motives than we originally foreseen.

4.1 Interviewees’ reflection on the destination and product experience of Chinese tourists in Slovenia

As a part of semi-structured interviews, respondents provided valuable insight information beyond the tourism flows, in particular on the product experience of Chinese tourists in Slovenia and their personal reflection on the destination itself. This basic reflections of interviewees’ serve as a great reference frame for understanding Chinese segment’s specifics before uncovering their tourism flows in Slovenia one by one.

4.1.1 Reflection on destination experience

Majority of the Chinese tourists usually move geographically around the destination in the following three directions: from South-East (yellow line), South-West (orange line), North-West (green line) or vice versa presented in the Figure 6 below. These arranged touring options are most commonly across Slovenia in transition, using entry and exit points via Zagreb, Venice, Budapest, and Vienna. Collected tourism flows show a strong pattern of convergence – though not identical, construct of travel locations may be explained by a number of travel options presented later on. Arrows indicate the most common direction of the particular tourist movement.
The far most visited top 3 locations based on interviews are Bled, Ljubljana, and Postojna, connected into outstanding black triangle on the Figure 6, what for interviewees have adequate interpretation: “Postojna is most reached, marketed… they have very expensive ticket… so they have very substantial commercial activity in domestic and overseas.” Good infrastructure and supply-catering are the advantages when travel gets crowded: “That's why Postojna is great. Since you are there for a specific time, you know how long it will take. Once you get out you have a toilet, few restaurants. It is close to the highway, and this is ideal for Chinese tourist and the tourist agencies. Everyone wishes to make every destination as such. This setting is ideal for them, while they are just so used to it. In Slovenia, we are not used to this, and in my opinion this is even better if you ask me. You should then take at least one additional night in Slovenia to get something else. This is totally clear why these three, due their infrastructure. And because of the closeness.”

As areas with no potential respondents mentioned Prekmurje and Dolenjska region (East and South-East Slovenia): “Unfortunately some Prekmurje with its flatland won't fascinate them much. There is still nothing to do in Dolenjska... Ribnica and Suha Krajina will never get promotion, while there is no tourist attraction to build upon. Chinese tourists seek for story put together with a little kitsch next to it. This is a winning combination.” Štajerska region it is also optional direction of arrival (coming from Budapest), so it is very typically to stop on the way to Ljubljana for example on a lunch-break, but not to travel there explicitly. “I've never seen someone going to Škofja Loka. The problem is also that at the beginning of a tour it might still be an option to visit this small cities. The problem is when you see two or three churches, even though here in Slovenia it is still quite diverse. When in Croatia there is always: the sea, the church, the walls, and then 5 days of it. And for Chinese this is all the
same, I understand. But just as you suggested, maybe we should do something with natural parks. I don't know if they would really like it. I already feel inappropriate to only translate content because it's all the same.”

When asking respondents what Chinese tourists like the most about Slovenia, the answer was quite straightforward: green colour and nature itself, cleanliness of air, water and roads, and therefore their general impression with the photogenic nature of Slovenia. “The fact that it is unspoiled is something we don't even appreciate so much. Those of us who travelled to China know what that means. Clean air and drinking water. There it's not a usual course that you can go to toilet and pour yourself a drinking water.” Another aspect mentioned several times were safety and calmness, as an opposite of multimillion Chinese cities.

Another significant fact is that Slovenia and China have a part of a history in common, since both of the countries had similar socio-political order and strong leader figures. The Former Yugoslavia and its figure Tito are widely known among the Chinese generation which has the biggest share of tourists, arising from their school system. Similarly, several Yugoslavian films were translated to Chinese, for instance “The battle of Neretva, Valter brani Sarajevo and Ne joči Kekec” and used to be very popular in China (Raspor & Kobal & Rodič, 2012). Therefore, storytelling about Tito, and Ljubljana as a dragon city is very attractive to Chinese tourists. Furthermore, Chinese tourists are in general interested in The United Nations Educational, Scientific and Cultural Organization (UNESCO) (n.d.) world natural and cultural heritage and will very likely follow them, while China has 55 properties inscribed on the World Heritage List. Slovenia has four: Škocjan Caves, primeval beech forests in the forests of Notranjska and Kočevsko region, the Ljubljana prehistoric pile-dwellings and the oldest wheel in the world, heritage of mercury in Idrija.

Main two identified strengths of destination Slovenia were the country’s size, geographical location, and diversity. “The country’s size is certainly an advantage, because it is more feasible that way. Chinese tend to have really busy schedules, so they can fit the main activities into 2-3 days without any logistical problems. In addition, Slovenian roads are okay, which is still not the case across the Balkan countries.” Respondents are aware that despite the destination’s area, there is a lot to offer. “It is true, however, that the Chinese are quite pragmatic. They will certainly not fly several thousand kilometres because of one small country, so they always combine it as a part of something bigger.”

Advantages can, on the other hand, quickly turn into disadvantages: “Surely there is an opportunity for Slovenia, but we are not attractive enough for such a large market as China … It is not clear to us what to do if we have to do it.” “Maybe for current travelling generation we are promoting the wrong stories, but for this younger generation with more awareness, there are so many interesting stories in the global sense … even though we are the 9th most desirable world destination … but more recognizable cities to Chinese alike Venice, London, and Paris are still there. Ljubljana is having a hard time sidestepping to Paris, Versailles or Venice, but as a country it may be a little easier.”
Weaknesses were encouraged with stronger county identification for stronger positioning on overseas markets including China. 2) more joint promotion with cross-destinations and cities, and more 3) tourism products for niche markets. “For example, Switzerland or Sweden they are ambitious, but recently they clearly marketed well in the Chinese market. But Slovakia and Slovenia are still static nation about the identification … It is very difficult the identification. National flag and coat of arm is similar. Even the cuisine is similar … In my opinion, Slovenia has to more concentrate to the south, to make more joint promotion with Italy and Croatia … If you say you are close to Austria we can’t identify you.”

Respondents’ opinion on tourism sector’s acknowledgment of Chinese market in Slovenia is divided: it seems like Chinese tourists are slowly gaining attention of public and tourism sector together with the awareness that they are gradually becoming the biggest segment of tourists, while the minority is considering growing numbers of Chinese tourists in Slovenia only as cycle trends and their temporal re-location due to unsafe European capitals. Actors being present on this market believe the persistency is the key. “Being present one year on such a big market like Chinese, and expect the whole new segment to open up to you just like that, precisely the kind of upper-class that we all seek for, this takes time. Like I said, we've been active for 9 years now, and it seems that things are a little different now. We can see this change, in such a positive trend. The positive trend in terms of arrivals and overnight stays has been around since day one. But the positive trend in terms of their interests in something beyond these main locations, and their longer overstays, this is just starting to happen. And it's so nice to observe it.”

Interviewees’ opinion about collaboration among the actors in the tourism sector in Slovenia it is generally positive, particularly when working together with DMO on the national level. “It seems to me that cities with strategically strong position are still relying exclusively on their location and have no particular desire to serve only the Chinese tourists. In Portorož, they are fully occupied, with them coming or not … they probably don't have a terrible desire. For most of the hotels and destinations is the most important only the fact that they are occupied, no matter what guest structure is. But there are probably several smaller cities with the interest to attract tourists and they see Chinese guests as an opportunity to grow. I would more say that powerful locations, not that they don't want to connect with others, but simply they don't feel the need to. Because they are already fully occupied, if they change their behaviour or not.” Simultaneously respondents signal disintegration among city-locations across the destination and persuasion to follow narrow interests of the individuals: “Look here, there is a great deal of individualism and, on the other hand, too much concentration of sleeping capacities and these actors on the one hand, because they can always dictate prices. On the other hand, bottleneck is disconnection. Now, of course, how to encourage this connection … Someone from the coast will not be interested in what is happening in Murska Sobota.”
Thus, hunger for cross-selling on the national level and joint state promotion is undeniably noticeable; what is more, the importance of coalition networks with surrounding countries or even on the regional level (Western Balkans) is likewise initiated.

Respondents also noted the extremely valuable functioning of local travel agencies, to initially offer the best service possible to their Chinese partners (representative offices in China for promotion or Chinese tour operators and travel agencies), present the importance of local tourist guides and their know-how, and responsibility to in general overcome cultural differences when presenting their location-selection on the destination itself. “Yes, Chinese agencies come to us through local agencies, Slovenian and Croatian. However, there is a great selection already in how willing they are the local agencies to make a quality sight. Let’s say the Zagreb agency that has these tours, they constantly book with us ... the most expensive service possible ... different agents have different approaches and we also have different types of visitors.”

Beside Slovenian travel agencies there a range of important travel organisers in the neighbouring countries, for instance Croatia, Hungary, Czech Republic, Germany, that are specialized in designing tours for both simple and complex itineraries. With a wide network of local contacts and service providers which enables organizers providing cost-effective, guarantee, professionally and safely escorted Chinese tourists.

Handling unlicensed Chinese tourist guides likewise pull together the interviewees challenging point of view, that who gained knowledge online or took the particular tour once cannot provide sufficient professional guidance over a group of tourists, especially when Chinese tend to follow guide instructions and suggestions (including where to buy souvenirs or which food to try). If this continues ahead with providing misleading information to the tourists, doubling prices or charging for free passes this is absolutely not in interest of Slovenian tourism sector. Another important challenge regarding tourist guidance is providing enough local tourist guides speaking Chinese language, which is currently in deficit across the whole Balkan region, not only in Slovenia. Guides also play their role when advising Chinese tourists before arrival itself, while travellers tend to contact them before arrival, even though the itineraries are mostly done beforehand.

 Definitely are markets’ specifics challenging the local travel agencies: “We are searching and trying if it will pick up on the Chinese market because it is a little specific, you won't know until you don't try … It may be that the Škocjan Cave may be more authentic than the Postojna Cave, but then they also like the train … But the problem with them is, what else to show them what they do not have at home. Because they already have everything artificially made at home. As you would call this instagramability, this is what it is all about.” “This is a problem with the Chinese market, but you have to decide. You have demand, but the hotels are full. They do not yet understand these issues, they are quite stuck in these and we want these hotels, at their prices ... Money is not really a problem, but they like to negotiate.”
At the same time interviewees also exposed the remarkable role of Chinese tour operators and agencies having direct impact on the end-consumers, which can be in fact affected only over longer period of time as a result of constant work and coaching Chinese travel agents by local professionals (mostly Slovenian travel organisers and travel guides when talking about mainstream tourism). In order to be persuasive, there is a need of sequence of systematized actions on several levels within destination by its crucial representatives of promotion. Exactly this is also a reason which to one extend frustrates a part of the interviewees.

Regarding the format of the workshop in China itself, most part of the interviewees believed that suggests talking with the right people from the Chinese travel industry. The main challenges remain, in fact, travel habits of any non-European visitors (including Chinese tourists) coming to Europe for only short period of time with overall different types of itineraries generally covering only “must see” locations across the region whereas reappearance is questionable: “With Chinese guests, it's a little harder to plan for them to come back, but maybe they will. To introduce them to those ‘must see’ points, change a little of this habit, which is actually very difficult. Because the majority is already coming up with what kind of itineraries they will do, we always come up with some innovations in this regard. It is always a challenge … But not adjusting, but how we really make the initial offer friendlier for them. That there we have some inscriptions in Chinese, that we have the ability to pay, that we have materials in Chinese. If we don't provide this, then they will find their way, but then this is not something we would like to have.”

Due to nature of the business some of the activities on the destination and regional levels are already constant practice throughout the year, for example cooperation on regional level with travel organisers, tourist guides, hoteliers to familiarize tourism parties with new trends that can be implemented in their programs, and providing materials; most often as a joined activities when international activities take place, alike workshops, preparing promotion material, etc. “We also focus on really showing them what is more appropriate for a Chinese guest, what are those experiences that can make them stay longer … Basically, these products, which are no made for them, but more easily accessible for Chinese guests in this sense.”

Since 2010, national DMO has been performing general country promotion and positioning of Slovenia on the Chinese market with its main focus on activities with B2B, mostly as a joint promotion with Croatia under slogan “Experience Croatia, Feel Slovenia” and as part of European Travel Commission (ETC) under the umbrella brand “Visit Europe”. Moreover, for 3 years they have educated travel organisers via promotional trips, organising events and presenting development to the local service providers and other enterprises.

There are several important players on which the outcome of this assignment depends. With its purpose to set the general framework for other actors coming from both, private and state-owned sector, to collaborate more and present their own products and services, DMO is
eagerly anticipating for participation of other bigger hotels, intra-destination regional DMOs, and other enterprises to present their businesses with prime expertise and though empowering enthusiasm. At the moment, financial burden when participating on the workshops in China is mostly powered by local incoming travel organisers and therefore right to applaud to bring Chinese tourists to the whole tourism industry in Slovenia.

The above-mentioned collaboration is in particular important when shift towards more demanding segments of Chinese tourists and experiences has already been detected. Another deviation noticed by DMO is the participation of specialized Chinese travel organisers on organised workshops in China, in the areas of luxurious travel and special interest groups (gastronomy, wine tasting, light adventure, etc.), that includes Slovenia as a novelty in their travel programs. Consequently, DMO on national level is beside early mentioned workshops once or twice a year addressing special certain segments of Chinese tourists throughout lifestyle magazines and social media channels WeChat and Weibo, presenting content which is not standard like for bigger tour groups, but rather innovative and promoting experiences and activities. In the interest of 2018 EU-China tourism year DMO got extra funding by ETC, which enabled educational online training for Chinese travel organisers including travel agents and formation of promotional materials in Chinese language, which are available online 24/7.

Seasonality is for the majority of leisure tourists in the strategic tourism flows the same: early spring (April, May, June), a little less in July, August, November, and top season in early autumn (September and October) due to cheaper prices, less crowd, and their free time. “It's not this classic summer season similar to Europeans. Again, it doesn't matter to them, they don't swim, they don't sunbathe, again this aspect of the sea is not that essential.” This year the interviewees widely recognized an early start of the season; in 2019 it already started in March, and April was already crowded. For the Chinese business guests on the other side timing does not play a crucial role.

4.1.2 Reflection on tourism products

With respect to missing tourism infrastructure tourism experts were unanimous there is hotel capacity deficit (noticed also small room sizes for Chinese standard), which becomes especially problematic due to last-minute demand. “Which means you don't get the accommodation, that's the main problem and we all know it … Yes, central Slovenia absolutely, but by that I mean from Ljubljana to Bled. There is almost no space for new hotels in Bled ... in the vicinity of Ljubljana they are currently in the process of building new ones ... because, for example, the Chinese have no problem sleeping 30 kilometres outside the city. For example hotels on higher level in Kranj, Grosuplje and its surroundings are missing.” Other shared opinion among interviewees were lacking parking places, no direct flight connections, and absence of Slovenian staff know-how regarding small but crucial differences important when dealing with original culture like Chinese, for instance availability of electric kettles in the rooms in order to provide warm water, which is also
gradually getting better: “It's getting better and better. Many times they even ask themselves, you immediately notice those who are used to Chinese guests ... in the restaurant for instance they immediately ask if they would like to have water, whether it's hot or cold. That's the first difference.” “We're trying hard, but what we are lacking are these direct air connections. So tourists will almost always come to the surrounding airports, except for business. But I'm not sure this will change anytime soon, because foreigners are already complaining about it. Nevertheless, road infrastructure is okay, but how to get here first …”

Representatives of tourism sector did not really notice that Chinese tourists specially complained about something, but respondents did notice visitors dislike the scale and scope of local public transport, obstacles on the road due to their busy schedule, and lately increasing cases of the thefts due to large amounts of cash on hand. “Then they are so angry because there is no such police protection at the centre ... This is huge, I hear about theft two-three times a week. At least 2-3 groups a week certainly only among my customers. Imagine including other tourists. They probably know that the Chinese carry around money. This is a very bad advertisement for Slovenia.”

“These are more banalities on the trips that cause us getting complaints from their sides and we have to deal with them. In order to say that they are only complaining about the destination … it is important to them again that they are on the lake side of Bled, that they have the sea-view on the seaside, and that they have the same type of rooms for all tourists... so if this is guaranteed they are satisfied.”

Regarding payments respondents are aware of tendency towards mobile payments in China and importance of enabling the same options here in Europe (based on good practices of Alipay and WeChat Pay which are to some degree also available in Slovenia since early 2019), but on the same time also disclose that whenever the visits for groups are pre-arranged they mostly receive monthly payments by their constant business partners. This results in less direct transactions by consumers on the spot, whichever are mostly card payments. Furthermore, according to interviewees certain Chinese banks have bonus schemes and initiate clients’ higher card expenditure in order to qualify for some bonus freely given after certain amount of total payments abroad. “For anyone who has ever visited China, they know that everything is done over the phone. It is important to Chinese tourists that they have enough money. Sometimes, even with these Chinese plastic cards they have some limitations. But with mobile and electronic payments they of course also spend. There are examples of good practice across Europe, where it is already widely introduced that daily consumption has also increased significantly. They are more used to the process itself, plus they immediately know how much they spent in the local currency. So, it will certainly be great, but it will probably also take time for this payments to build up.”

At the same time respondents gladly welcome availability of mobile payments in Slovenia that are also important for the Chinese travel organisers from the perspective of intend invasion of solo travellers to Europe that eliminates the risk of carrying cash and of exchange
fluctuations: “However, this spring, when we were announcing the possibility of Alipay payments in Ljubljana, we received a lot of approval.”

The interviewees noticed potential for development in the direction of 1) health and wellness tourism in order to receive medical treatment (dentist), successful recovery or a relaxing vacation in numerous natural and thermal spas, 2) bringing together culture, gastronomy (wine), history, and 3) sports-themed travel; combined in multi-day packages which are so far left unnoticed; for instance, well-being tour, gastronomy tour. “There are multiple possibilities and it seems to me that there is no such thing as to say, that none of them is really not in the interest of Chinese tourists. I think every single thing, if you present it in the right way and combine it with other products can be sold. Not to only remain with the existing offer, but to encourage joint products.” Similarly, gastronomy related products like Kranjska sausage, honey and honey products, and liqueurs were recognized as prospect tourism products for Chinese tourists after first raising their awareness.

According to the experienced interviewees working with Chinese tourists, the following convenient observations can be noticed: 1) language is not problematic as it used to be; 2) shopping is no longer the prime reason for travelling, but leisure and discovering local culture and heritage, however, it remains an important point; 3) there are 15 visa centres across China to arrange visas (Slovenia becoming a member of Schengen Zone in 2007), not mandatory only in Beijing like 15 years ago; 4) travel style – organised, guarantee departures, less stress, language barrier, safety is important, taking pictures is their main activity; 5) Chinese are quite demanding tourists, not easy to satisfy their needs originating from cultural differences: warm breakfast with soup and noodles, rice, fresh fruits; kettle and warm water, always carry a pack of instant noodles with them, they are used to hi-technology standard (higher than European standards); and 6) there are two bigger travel groups who travels – seniors (they have time and money) to increase their social status or young people as an investment into their future (hard-working along with less holiday days so consequently this segment does not travel often).

Chinese interviewees expressed that Slovenian cuisine is too salty for their taste, while “Every time we have to tell them not too much salt, not only in Slovenia but in all the Slavic countries.” They find it interesting, but not that pleasant for Chinese taste: with the substantial amount of meat is it too heavy for their taste. Tourists observed that Chinese food in Europe generally does not taste much like back in China. Respondents noticed that Chinese tourists find important to try local Slovenian food, even though for regular meals they prefer to stick to Chinese food. Another interesting observation related to food is that Chinese food in Slovenia is tastier and more price affordable compared to the rest of Balkan region; it is not only that Chinese cuisine reminds tourists of home and they are used it – it is fast served and also enables them to talk with restaurant employees and order independently.
Recently, Slovenia was also working on becoming China-friendly destination: providing information about destination in Chinese language (promotional materials, audio-guides), available guiding tours with Chinese-speaking tourist guide, development of tourism products for Chinese tourists (Urban electric train in Ljubljana), Alipay payments availability, all available in Chinese language.

4.2 Analysis of the existing tourism flows

In the attempt to arrange Chinese tourists into several major segments, the interaction between the SVF maps, the obtained tables and transcripts enabled a data validation process that increased the reconstruction of reality with every additional piece of information. That allowed the development and building up idea of individual SVFs and of the possibilities to data connection and emergence into significant and repetitive four SVFs individually presented below.

Each tourism flow is named after identified primary segment group, budget constraint, and group size followed by most repetitive sequence based on the selected data.

4.2.1 Strategic visitor flow 1: Packaged GIT

*Figure 7: Map of Packaged GIT cases*

First SVF was significantly repetitive in my sample and on the account of group size extensive in numbers. It represents well-establish travel route of Chinese tourists in Europe, seeking main destinations only.

This are travel arrangements combined by tour operators or travel agencies in advance, sold out as a finished product to a big sized groups from 30-55 people under their combination
of locations in for the best value in the chosen destination (relatively economical price for very price-sensitive tourists). Arranged touring options usually visit 6-10 countries in 21-28 days, and Slovenia as a destination usually takes away maximum two days of their time, but not more than one overnight stay. “Yeah, because it's a really busy schedule. Not in the way that we Europeans travel, I would say. They know to reach distance from Zagreb to Mostar as nothing in a day, but in the meantime, to stop in Plitvice and some other city like Zadar, which is quite a classic … and sightsee at everything in between. To visit all these locations in one day is a science fiction, but the Chinese know how to do it.”

The most repeated flow sequence is Bled – Ljubljana – Postojna, whereas tourists do not visit any other location than our top 3 destinations. They travel Europe by land and their mode of transport is bus, so they usually enter Slovenia on the border, their most common direction of entry (or exit) is Zagreb. Interviewees describe this typical Chinese groups as big and loud, mandatory guided by Chinese tour leader. As observed, these are not first-time travellers to Europe, they have already visited several must-see European destinations (e.g. United Kingdom, France, Spain, and Italy). Respondents described these tourists as individuals that are composed together by organisers, originally complete strangers.

This predominantly seniors are always in a hurry, so interviewees did not identify any potential destination areas to extend their travel pattern. Due to frequent occupied-capacity in the capital Ljubljana, this SVF is already allocating overnight stay towards Bled and smaller cities which can supply it with available accommodation for even lower price, alike Domžale, Kranj, Snovik (blue points on the Figure 7 above). As an outcome of the last two points, tourism representatives are not highly eager to attire this segment of Chinese tourists while they are not good spenders on the destination and so contribute low value-added to the Slovene tourism.

Better catering along the way of the flow itself still do represent the opportunity to improve, for instance good Chinese restaurants (especially in Gorenjska region and Postojna), vending machines with Chinese snacks in the hotels, parking spaces for biggest allowed buses in EU (excuse Postojna), accurate traffic conditions and information to detour.

Touring options mentioned in my sample were 1) Former Yugoslavia tour, and 2) Slovenia+Croatia tour, especially as a consequence of Belt and Road and 16+1 initiatives by the Chinese government and recent finished substantial amount of Chinese tourists from 2018 EU-China tourism year funded by ETC which was in tourism numbers noticed from middle 2017 to 2019.
<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Personal, leisure</td>
</tr>
<tr>
<td>Package travel</td>
<td>Pre-arranged, series tours</td>
</tr>
<tr>
<td>Number of locations</td>
<td>Top 3</td>
</tr>
<tr>
<td>Sequence</td>
<td>Bled – Ljubljana – Postojna</td>
</tr>
<tr>
<td>Frequency</td>
<td>Highly repeated</td>
</tr>
<tr>
<td>Flow development</td>
<td>Well-established</td>
</tr>
<tr>
<td>Group size</td>
<td>Big group (30-55 people)</td>
</tr>
<tr>
<td>Age group</td>
<td>Senior (50-75)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>1 night</td>
</tr>
<tr>
<td>Transport</td>
<td>Bus</td>
</tr>
<tr>
<td>Flow extension</td>
<td>None</td>
</tr>
<tr>
<td>Flow potential areas</td>
<td>None</td>
</tr>
<tr>
<td>Arranged touring options</td>
<td>1) Former Yugoslavia tour</td>
</tr>
<tr>
<td></td>
<td>2) Slovenia+Croatia tour (16+1)</td>
</tr>
<tr>
<td>Direction of entry and exit</td>
<td>Zagreb, Venice, Vienna, Munich, Salzburg,</td>
</tr>
<tr>
<td>points</td>
<td>Opatija</td>
</tr>
</tbody>
</table>

Source: Own work.

Ready-made guided tours embody Chinese mass tourism as a stream in transition, which suitably counts just in tourism statistics but does not contribute much too Slovenian tourism sector. “The outlines of these tours are already pre-set. They just continue to take part one after another by certain rules ... Then we also have permanent partners, which can be noticeable at choices of hotels and restaurants in these destinations ... Why these particular locations, the typical ones that would be presented in the classical tourism guide they are even then promoted.”
4.2.2 Strategic visitor flow 2: Customised GIT

*Figure 8: Map of Customised GIT cases*

The SVF 2 is well-established and the most repeated tourism flow among interviewees. Main purpose of this alternative SVF is still leisure, also organised by tour operators or travel agencies but for a difference with SVF 1 tourists influence decision-making process incorporating their wishes into travel itineraries. Second contrast is this groups are smaller in size, from 15-25 people, in my data more often smaller than not. In most of the cases these travellers know each other, they are noticed to be ex-co-workers from the state-owned companies or friends from school that are better situated so they can afford the tour (have better pensions and well-fairs). “They search online. And online marketing plays significant role in Chinese. You must have very inclusive and multiple products that are already displayed in your website or in distributed online booking website. They will use online chat, talk with online salesman to change some parts … Everything is negotiable with our salesman. No, they will not repeat the tour. Every time they will have the small change. Also hotels and restaurants will change. ”

Similar like SVF 1 before this touring options visit multiple countries at once. The most repeated flow sequence is Bled – Ljubljana – Postojna – Piran, expecting this segment of Chinese tourists does in addition to top 3 locations, Bled, Ljubljana, and Postojna visit also the old town of Piran (two-thirds of the cases). As a main attractions respondents identified Bled castle, Bled Lake and the island, Postojna Cave, old town Piran, Ljubljana castle. Other flow variations include both Postojna and Škocjan Caves, Maribor, periodically Bohinj and Velika Planina (if the group has more time and interest).
Essential difference is they are not only willing to see more, but also to stay longer – from two to three nights. Sleepover cities mentioned are Bled, Postojna, Ljubljana, Kranj, Maribor, typical accommodation type would be 4* and 5* hotels. The interviewees named Lipica, Portorož, and Ptuj as flow potential. This middle sized groups are also escorted due to language barrier (Chinese tour leader and local Chinese tourist guide or tourist guide speaking standard Chinese language provided by travel organiser), their most common mode of transport are mid-sized buses or bigger vans, depending on the edge of group size. Typical persona from this SVF 2 would be senior of age 59 (1960 born), so regarding trip activities they prefer no hiking and no substantial amount of walking (more than two hours).

Table 6: Characteristics of Customised GIT

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Personal, leisure</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package, premium tours</td>
</tr>
<tr>
<td>Number of locations</td>
<td>4</td>
</tr>
<tr>
<td>Sequence</td>
<td>Bled – Ljubljana – Postojna – Piran</td>
</tr>
<tr>
<td>Frequency</td>
<td>Most repeated</td>
</tr>
<tr>
<td>Flow development</td>
<td>Well-established but partially still developing</td>
</tr>
<tr>
<td>Group size</td>
<td>Medium group (15-25 people)</td>
</tr>
<tr>
<td>Age group</td>
<td>Middle age (26-49)</td>
</tr>
<tr>
<td></td>
<td>Senior (50-75)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>2-3 nights</td>
</tr>
<tr>
<td>Transport</td>
<td>Mid-sized bus, van</td>
</tr>
<tr>
<td>Flow extension</td>
<td>Radenci and Maribor</td>
</tr>
<tr>
<td></td>
<td>Škocjan Caves</td>
</tr>
<tr>
<td></td>
<td>Portorož</td>
</tr>
<tr>
<td></td>
<td>Velika Planina</td>
</tr>
<tr>
<td></td>
<td>Ptuj</td>
</tr>
<tr>
<td></td>
<td>Bohinj</td>
</tr>
<tr>
<td>Flow potential areas</td>
<td>Lipica</td>
</tr>
<tr>
<td></td>
<td>Predjama castle</td>
</tr>
<tr>
<td></td>
<td>Sečovlje</td>
</tr>
<tr>
<td></td>
<td>Therms and spa, wineries and wine-tasting, North-East Slovenia</td>
</tr>
<tr>
<td>Arranged touring options</td>
<td>1) Former Yugoslavia tour</td>
</tr>
<tr>
<td></td>
<td>fly-in Brnik, continue to Zagreb</td>
</tr>
<tr>
<td></td>
<td>2) South-Central European tour</td>
</tr>
<tr>
<td></td>
<td>arrive from Venice and continue to Vienna</td>
</tr>
<tr>
<td></td>
<td>3) Eastern European tour</td>
</tr>
<tr>
<td>Direction of entry and exit</td>
<td>Venice, Zagreb, Vienna, Budapest, Rijeka, Pula</td>
</tr>
<tr>
<td>points</td>
<td></td>
</tr>
</tbody>
</table>

Source: Own work.
The interviewees mentioned several options regarding common advertised tours in transition with smaller adjustments, which usually move from South-East, South-West, North-West or vice versa. Tour names usually reflect flow themes and their main attractions in the region visiting. Far most repetitive and big in numbers is Former Yugoslavia tour, further in dominant part of this tour is performed in medium sized groups segment. In this case tourists fly-in to the destination to national biggest airport Brnik (80% morning flights), stay in Slovenia for two full days (no Piran) and sleepover twice, and the third day continue their trip to Zagreb. In the second case they arrive from Venice to Ljubljana, (Bled might be excluded) and continue to direction Zagreb. Second option South-Central European is focused on Slovenian history and does not combine post-communism. Tour enters Slovenia from direction Venice, and continues to Vienna, and for sure does not miss Bled. Third Eastern European tour is all opposite, based on post-communist Europe modernisation and transition towards capitalism coming from Budapest and continuing to Zagreb. This final one is distinguished while it covers also South-East part of the destination, stopping in city Radenci and spending the night in Maribor, in addition to two overnight stays (this tour joins the flow on their second day in Ljubljana). There has to be taken into consideration, these arising three tour options can be also combined (East and Central Europe, Austria-Slovenia-Croatia tour) or prolonged (Former Yugoslavia tour until Greece or even Turkey). 6-10 countries a mix of tours, for instance Czech Republic, Hungary, Austria, Italy, Slovenia, Croatia, Montenegro.

Based on the interviews, Chinese tourists usually complain about trivialities like any other tourists, connected for example to transportation (while in EU there is a limited size of a bus), European breakfasts in the hotels. Minimizing obvious cultural difference for them is very important, so hospitality sector should short the distance and make small steps to get services China-ready and customers fully satisfied: serve a worm soup, noodles, and some fruits in the morning.
4.2.3 Strategic visitor flow 3: Business executive delegation

Figure 9: Map of Business executive delegation cases

Source: Google Maps.

Another important segment are guests whose main purpose of visit is business related. In general, they arrive to the destination to attend important meetings or series of business nature events which occur for economical, investment or internal reasons. Thus, they are not genuinely associated to any seasonality, but mostly they still avoid summer season and the most repeated months in my sample were March and April.

Higher level of business professionals like CEOs, deputy managers, state-owned companies or manufacturers, and senior officials usually travel in medium-sized business delegations, containing 6-10 people, always accompanied by several assistants. The interviewees estimated their age group is 45-60 years old. Their main reason of arrival, length of stay and travel pattern is a reflection of their importance and time-efficiency, so senior management on average stay in Slovenia only one night in the capital city Ljubljana.

If meetings allow they might combine free afternoons to quickly visit Bled or just explore the city centre of Ljubljana. This overnight guests change the city for another exceptionally, only revolving around important meetings with senior management and executives of a local companies or Slovenian government. Predominantly this are one-time occasions, in some cases of business partnerships might repeat yearly (in that case usually escorted by hosting company from start to finish, and their itineraries might accordingly slightly vary towards non-repeating locations and events). Important high-level experts are escorted with translator and van driver. Usually enter and exit point to the destination is airport Brnik (convenience due to Schengen visa), sometimes also Venice or Vienna depending on the cross-country meeting locations.
Business guests are quite frequent and many of their trips are fully organised by Chinese tour operators or travel agencies. Local Slovenian partners might only arrange translators, some special treatments in the hotels or provide additional requested services, while this segment reaches only top-end 5* accommodation and their services, which are already used to exclusive Chinese corporate travellers.

Table 7: Characteristics of Business executive delegation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Business</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package</td>
</tr>
<tr>
<td>Business level</td>
<td>Senior management</td>
</tr>
<tr>
<td>Number of locations</td>
<td>2</td>
</tr>
<tr>
<td>Sequence</td>
<td>Brnik – Ljubljana – Bled</td>
</tr>
<tr>
<td>Frequency</td>
<td>Medium and stable</td>
</tr>
<tr>
<td>Flow development</td>
<td>Established</td>
</tr>
<tr>
<td>Group size</td>
<td>Business delegation (6-10 people)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>1-2 nights</td>
</tr>
<tr>
<td>Transport</td>
<td>Van</td>
</tr>
<tr>
<td>Flow extension</td>
<td>None</td>
</tr>
<tr>
<td>Flow potential areas</td>
<td>None</td>
</tr>
<tr>
<td>Direction of entry and exit points</td>
<td>Zagreb, Venice, Vienna, Munich, Salzburg, Opatija</td>
</tr>
</tbody>
</table>

Source: Own work.

4.2.4 Strategic visitor flow 4: Management delegation

Figure 10: Map of Management delegation cases

Source: Google Maps.
Business people on a middle management level are considered governmental officials on municipality levels (for example from sister cities in China) that are slightly younger than their senior superiors (middle-age group). This segment is directly affected by Chinese anticorruption policy, which allows lower officials with business purpose to visit two countries abroad only. Colleagues above provincial level can for a difference visit more than three countries instead.

Another restriction is business travellers can stay abroad maximum 10 days, for bigger business delegations they get also only Slovenia visa only. “If the officials apply the budget for the tour for visiting, it is not allowed to go outside Slovenia. I mean, you can do some sightseeing but inside the destination country.” According to the rules, meetings and visa approvals also travel itineraries are made by the tour operators or travel agencies. Besides the usual 4* accommodation, organiser arranges translator for the business part and private transfers – these are usually bigger vans with driver.

More people travel together on higher level, in this case number of travellers usually drops to 5. Similarly, they use to always fly-in and fly-out from Brnik. In their maximum four full days and four nights (majority stays three nights) this middle management groups spent in Slovenia according to the interviewees, Ljubljana is dominantly used as a central hub. From the capital they alongside the meetings and official dinners plan day-trips around Slovenia to Bled, Postojna, Koper, and Maribor. Staying on the destination for a few days more, this business segments gets more free time so it is inclined to explore the country more and sightsee at least Slovenia’s top 3 attractions plus Piran. Very much alike their superiors, they sleepover in Bled or Piran usually if this is on their last day of stay before the morning flight back home.

These small business delegations might use car or a mini-van as a mode of transport, keeping them completely mobile. Aside of translating, their touristic information about the destination and commonly even drive the car. No seasonality problem it is also this segment’s feature, but they mostly lean towards winter and early spring months up until April, before European summer season for leisure tourists the streets are overflown big starts in Europe.
Table 8: Characteristics of Management delegation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Business</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package</td>
</tr>
<tr>
<td>Business level</td>
<td>Middle management</td>
</tr>
<tr>
<td>Number of locations</td>
<td>5</td>
</tr>
<tr>
<td>Sequence</td>
<td>Brnik – Bled – Ljubljana – Postojna – Piran</td>
</tr>
<tr>
<td>Frequency</td>
<td>Medium and stable</td>
</tr>
<tr>
<td>Flow development</td>
<td>Established but partially still developing</td>
</tr>
<tr>
<td>Group size</td>
<td>Small business delegation (4-6 people)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>3-4 nights</td>
</tr>
<tr>
<td>Transport</td>
<td>Van</td>
</tr>
<tr>
<td>Flow extension</td>
<td>Koper</td>
</tr>
<tr>
<td></td>
<td>Maribor</td>
</tr>
</tbody>
</table>

*Source: Own work.*

Business people always choose convenience over offer, sometimes companies even rent rooms and apartments for longer: “They are not looking for a better lunch, they are looking for the closer one (Chinese restaurant).”

4.3 Development and proposal of the new tourism flows

Besides clear recurring touring routes, the respondents’ communicated illustrations of the following niche tourism flows were proportionally smaller in numbers but nevertheless presented in the sample. The particular cases of data are complete but not sufficient in numbers to generalise them – also specific and customised to the smaller groups’ activities, based on the length of stay and income. Due to this reason, only NSVF 1, 4, and 5 have presenting tables with basic elements. Accordingly, none of the NSVF has a tourism flow travel pattern. Rather illustrated points on the destination map indicate the potential or new suggested locations and highlight the links between the cases conducted or total divergence from so far identified tourism flows.
4.3.1 Niche strategic visitor flow 1: Customised FIT

*Figure 11: Map of Customised FIT cases*

Beside SVF 1 and SVF 2, NSVF 1 is another meaningful branch of leisure Chinese tourists which is quite new and developing in terms of supply and demand. These smaller groups up to 15 people usually result as vacation holidays with family and close friends or set of individuals who are travelling together based on their very much alike interests combined by tour operators or travel agencies. This NSVF 1 can be a variation of any side of middle age group, for instance young adults or seniors, multigenerational families (three generations on such a trips – children, parents and grandparents), or women only groups with emphasis on tailored itineraries. Travel organisers still make their travel much easier with basic organisation of their transport, accommodation and tailor their itineraries based on groups’ preferences (for instance history, photography), which is the variation from previous also customised groups (SVF 2). In data collected all groups of FIT travellers’ utilized professional guidance (local Chinese speaking tourist guide).

Common characteristics of this particular segment are higher education level and increased consumption expenditure who (partly) organize their trips on their own. These almost individuals travel unhurried compared to the typical previous group travellers, amazed to seek for more – meaning they are willing to extend their stay for additional day or two to experience more and get excited about adventures, culture and tradition. Specialty of this segment is also that dynamic options are better than stationary. Activities like visiting museums or trying local cuisine are often part of their travel patterns.
In that manner, previously mentioned age is another feature that distinguishes this segment from the others, while the average Chinese tourists in customised premium FIT travel group would be in the age group between 30 and 40 years old (born in 1980s and 1990s) or even younger, that directly influences on the groups’ movements and activities. In accordance, interviewees mentioned interests of younger groups (and presentation to them) slightly varies, towards more contemporary history (for instance Austro-Hungarian Empire, reunification of the Primorska region), architecture, night life, and known Slovenians (alike Slavoj Žižek, Melania Trump, etc.). These tourists tend to also try local cuisine (one-two meals per day), even though Chinese food still remains their requirement. This higher class of guests is seeking for products of higher quality through their travel itineraries. Slovenian travel organisers are to limited extend already providing several offers for them to choose, for example, tried with different city-locations like Maribor, and currently Piran.

In practice presented extra customised package tours can be also combined or shortened European tours whereas number of countries showed in sample were cut in half (from six to three), for instance Former Yugoslavia tour, East and Central Europe, Austria-Slovenia-Croatia tour, Italy-Slovenia-Croatia. “There are also many people who return to the Balkans. For example, those who have already been on one tour before, and now they seem to be able to do it second time themselves. Or they decide to visit only one destination in detail.” Accordingly, entry and exit points might variate, or even result in a round trip whereas tourists fly in and out from the same airport.

This niche flow of tourists might also not be that strongly bounded on seasonality like SVFs 1 and 2, but might occur also outside the most visited months (alike February in my sample).

Table 9: Characteristics of Customised FIT

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Personal, leisure</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package</td>
</tr>
<tr>
<td>Number of locations</td>
<td>Top 3 + more</td>
</tr>
<tr>
<td>Frequency</td>
<td>Low but growing</td>
</tr>
<tr>
<td>Flow development</td>
<td>New and developing</td>
</tr>
<tr>
<td>Group size</td>
<td>Small group (up to 15 people)</td>
</tr>
<tr>
<td>Age group</td>
<td>Middle age (26-49)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>2-4 nights</td>
</tr>
<tr>
<td>Transport</td>
<td>Van</td>
</tr>
</tbody>
</table>

Source: Own work.
The interviewees noticed expansion of this segment of tourists in the Chinese market and recognized it as the most prospect segment of Chinese tourists in the future years. In the present stage, travel organisers and service providers are starting to plan their offer or adapt the existing one to FIT Chinese tourists: “This is more for those guests who don't need the group leadership, but younger people who want to travel we can make things easier for them ... like their Ctrip so that they can get things done through this ... they are so used to paying with WeChat ... we would like to arrange something with several Chinese restaurants across the Balkans, while Chinese people really know each other in the region, they are really connected community ... to give these FIT guests a whole spectrum, we haven't define them yet, so far this are ideas only ...”

Even though the segment was rarely presented in my sample, there is a perfect opportunity to service and re-shape this flows while they are still developing. “The agencies are not expected to immediately change all their programs within a year and take their customers to Ljutomer or Jerusalem. But for individual guests we can afford that.”

FIT guests, including two emerged subgroups, are suitable segment to suggest all and more that Slovenia as a destination has to offer in order to boost Slovenian tourism sector. The remaining question is only how to facilitate services (alike easier transfer, booking attractions) and provide the offer for this continuous growth of consumption oriented Chinese middle class: “I think they are interested in many things, it is more of a question what we find interesting and what they find interesting.”

Slovenia can offer whole range of theme tours, eco tours, from backpacking to luxury travel, light activity and adventure holiday, city breaks, cultural holidays, golf holidays, heritage holidays, honeymoon vacations, ski holidays, spa & wellness holidays, sports holidays, trekking holidays and considerably more. This particular segment with its sub segments is a great opportunity to offer niche category products as niche tourism flows, including also intangible products that are important for tourists, for Chinese to take them home as souvenirs. “They are always really excited here, and we believe that these experiences in Slovenia are the tool to attract them and pull them back another time. It is one thing when you live the experience day after a day, which piles up and it stays with you even after you return back home. So yes, those experiences are for sure.” Respondents proposed all sorts of ideas of different experiences that would in their opinion interest Chinese tourists.

Moreover, this segment is a perfect target group for half-day and day trips to smaller city and nature attractiveness to have possibility of different activities, in addition to standard top 3 location for Chinese tourists in Slovenia, Bled, Ljubljana, and Postojna. Identified and proposed flow potential areas are: lake Bohinj, old vine in Maribor, Vintgar Gorge, four UNESCO heritage locations (especially Škocjan Caves and Idrija mine), Vogel cable car ride, local wine cellars (alike Brda Hills and Jeruzalem), Kranjska Gora, Vinarium tower Lendava, Velika Planina, etc. Following locations should also expose stories from Slovenian history connected to historical milestones to hear about the lives of famous (for instance
Second World War in Soča valley, tomb of Bourbons in Kostanjevica, Barbara of Cilli from Celje), special local events and festivals alike Festival Lent in Maribor, local cultural performances and learning about extraordinary local products (Kurentovanje in Ptuj, beekeeping, handcrafting in Radovljica), following the steps of famous Europeans known to Chinese people (like Tito and Former Yugoslavia monuments, Sevnica and Melania Trump, Ana Roš), or identifying your China connection, such as a previous visit by a Chinese celebrity or a connection to topics that Chinese consumers feel strongly about (gaming industry).

Based on provided data FIT travel represents new flow of tourists, that can be subdivided on several segments based on the interests and activities. In the next step, two subgroups emerged – Very important person (VIP) travel and European-Chinese FIT.

4.3.2 Niche strategic visitor flow 2: VIP FIT

VIP travel is recognised as luxurious sub group of NSVF 1, the customised premium FIT travel, according to special privileges due to their status or importance, in this case the special treatment travellers are willing to compensate. Tourists tend to be younger generations travelling in comfort, seeking for adventures unique to visited destinations, and enjoying top-end level of 5* accommodation only, like Vila Bled next to the Lake Bled in Slovenia, former summer residence of the Yugoslav President Tito. This connected explorers might be also touring in an exclusive way, only in much slower pace, mostly accompanied with Chinese tour guidance. This segment is willing to pay additional money for real special treatment with extra individual touch from the booking to arrival, and return home. Quality reflects in the whole range of services: from organisation, transport, accommodation, guidance, meals, etc.

Examples of this NSVF 2 were hardly noticed in my sample. The ones spent the nights in Ljubljana and Bled, and used two different national borders to enter (Zagreb) and exit (Venice) the country.

Representative of this younger segment would be Chinese millennial traveller which was not the case in my sample but in a trend, listen to stories of their family and friends, hardly influenced by social media and internet blogs, visiting luxury department stores and in search for outstanding activities that will receive social importance back home, not available to every Chinese who already visited Europe, for instance playing golf and horse riding. VIP guests have in this sense an ability and the urge to remove from the masses.

4.3.3 Niche strategic visitor flow 3: European-Chinese FIT

Defining it as a niche tourism flow while it is one of the most prospect and overlooked segments in that manner, that includes Chinese born and raised in Europe, migrated, or permanently working here. In addition, Chinese temporary working and studying in Europe as Chinese language teachers or master degree students – so travel for leisure is their
secondary reason in Europe, but they still do it. This segment of European-Chinese tend to be mix of young adults and children, which usually travels in a setting of two-three families together (up to 10 people). As noticed, they normally recommend the visited destination to their friends and family.

Crucial distinction from Chinese coming from mainland China is that Chinese living in Europe are already partially adapted to the European culture (especially to the country of residency). As a consequence, in most of the cases they speak local language next to Chinese, cook their Chinese food with local ingredients, are adopted to use card payments and not mobile payments (Alipay, WeChat), and most probably used to read European online materials and web pages translated to Chinese language, thus Western online world. Chinese back home in mainland China do not use Google as such; they have their own search engines like Baidu and use their own social media. One respondent separates European-Chinese from the rest of Chinese via travel itineraries and tourist attractions, way of obtaining information about Slovenia, and willingness to try local food: “They read everything on the internet. Then they ask me for Slovenian food, I recommend them venison ... They look at bigger cities. If he comes from China, he looks sightsee only Bled, Ljubljana and Postojna. Those who come from the surrounding countries then go also to Piran, Portorož, Lipica, and Ptuj. They stay in Slovenia for several days, mostly for 2-3 nights.”

Similar like FIT guests might decide to organise travel on their own with help of internet or might use European tour operator or travel agency for basic customised organisation. However, what is crucial remains the same – provided offer still has to be available in Chinese language. From obtained information this segment is already rapidly growing and slowly establishing.

4.3.4 Niche strategic visitor flow 4: Educational trips

Educational trips revealed in NSVF 4 are educational experiences that allow students to apply their lessons to the real world outside the classroom and tend to be the most memorable moments of a student's career. Educational trips may also give students a chance to interact with students from other schools as they learn together or participate in group activities, which itself dictate the travel flow itineraries.

In my sample I had two illustrations of different levels of post-graduate studies that were quite unique, nevertheless the design of educational routes is normally (like in both of these cases) a mixture of dynamic education classes of several formats and free leisure time, that can be sometimes also organised as a group excursion. In such manner in both cases main purpose of visit is personal. In both cases students were accompanied by their professors and the duration of the trip lasted longer (up to one week) comparing to the SFVs visiting Slovenia for leisure only.
### Table 10: Characteristics of Educational trips

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Personal: education and leisure</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package</td>
</tr>
<tr>
<td>Number of locations</td>
<td>Top 3</td>
</tr>
<tr>
<td>Frequency</td>
<td>Low but growing</td>
</tr>
<tr>
<td>Flow development</td>
<td>New</td>
</tr>
<tr>
<td>Group size</td>
<td>Small group (up to 15 people)</td>
</tr>
<tr>
<td>Age group</td>
<td>Youth (16-25)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>2-7 days</td>
</tr>
<tr>
<td>Transport</td>
<td>Van</td>
</tr>
</tbody>
</table>

*Source: Own work.*

It is interesting though, that in both cases group of students tend to fly-in destination on Brnik. Within destination they mostly visit the capital Ljubljana where their activities are held, other locations are Bled and Postojna. Beside the weather, another element shaping their leisure time travel itineraries is entry visa to Croatia. Depending on the allowance, these NSVFs as forenamed might migrate towards Dubrovnik in Croatia or Venice in Italy for a day-trip excursion.

These visits of Chinese students are mainly annual practice occurring as a part of project working with Slovenian students, allowing Chinese to experience diverse societies. Seasonality of educational trips is linked to educational programmes, so most conveniently towards end of school year in May and June.

#### 4.3.5 Niche strategic visitor flow 5: FAM & Press trips

Promotional trips for travel organisers and journalists (FAM & Press trips)– fifth niche strategic flow represents a special type of business flow designed for promotion of Slovenia on destination level, especially for particular type of professionals, who tend to direct this information on to specific population groups according to their special interests and activities. In this matter, experts are travel organisers and journalists mostly coming overseas from China. A media tour is designed exclusively for travel writers for the sole purpose of helping them to publish positive stories about the target destinations.

Chinese tour operators and travel agencies in particular have to educate their own travel agents in order to encourage their best possible service to the end-customers interested into South-Central European region. The ability to visualise attractions and self-experience the destination empowers the employees to learn about the travel product, and then, in turn, present, recommend, and overall improve their performance when constructing pre-arranged tours for big groups or medium-sized customised packages to practical reduce cultural differences for substantial portion of Chinese tourists.
Similarly, promotional trips for journalists are meant to impress and potentially spread the good word about Slovenia further. FAM trips involve a lot of hard work to fully capture every aspect of the travel experience.

Table 11: Characteristics of FAM & Press trips

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Tourist flow characteristics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Purpose</td>
<td>Business</td>
</tr>
<tr>
<td>Package travel</td>
<td>Customised package</td>
</tr>
<tr>
<td>Business level</td>
<td>Study groups</td>
</tr>
<tr>
<td>Number of locations</td>
<td>Top 3 + more</td>
</tr>
<tr>
<td>Frequency</td>
<td>Low but stable</td>
</tr>
<tr>
<td>Flow development</td>
<td>Established and developing</td>
</tr>
<tr>
<td>Group size</td>
<td>Small business delegation (4-6 people)</td>
</tr>
<tr>
<td></td>
<td>Small group (up to 15 people)</td>
</tr>
<tr>
<td>Age group</td>
<td>Youth (16-25)</td>
</tr>
<tr>
<td></td>
<td>Middle age (26-49)</td>
</tr>
<tr>
<td>Average length of stay</td>
<td>3 days</td>
</tr>
<tr>
<td>Transport</td>
<td>Van</td>
</tr>
</tbody>
</table>

Source: Own work.

In like manner in my sample there were a few examples of promotional trips organised for Chinese travel organisers, commonly as an substantial part of incoming workshops targeting first-time visitors to Slovenia. It is in practice for the past 3 years to bring up to 3 travel agents per year on the destination.

Before the workshop itself there is a pre-tour were experts get the general introduction of the country: central Slovenia, the coastline and Gorenjska region, routinely pre-designed for all the participants. In the second part travel agents have the ability to choose between diverse post-tours that are designed according to particular interests, for instance gastronomy tour, wellness and spa tour, active tour, etc., whereas the promotion of range of special experiences is presented like truffle hunting with dogs in Piran, gingerbread-making handcrafting in Radovljica.

“This year, very interesting, we also had one Chinese agent, who was particularly interested in this wellness, spa, health tourism, for example she chose this … In addition to Terme Olimia, Rimske Terme, they went towards Radenci. Then one chose a gastronomic tour, where we also took them to Brda. But I think we had one on the active one as well. So that was it, just about everyone went into their own segment.”

Time intervals of this tours are typically before and after the season in February-March, and October-November. In that times travel organisers are preparing the new travel programmes and the accommodation is more likely to be available. Altogether normally national DMO organises 2-3 FAM & Press trips per year.
Many of the recent past tours since the middle of 2017 up to March 2019 were subsidized by ETC in the power of EU-China tourism year 2018 as a part of trans-regional projects. Moreover, ETC in the same period ran 200 FAMs for Chinese tour operators in 22 European countries (ETC, 2019a). The ETC in the past year similarly encouraged joint tour with Croatia, so called Slovenia+Croatia tour that was executed 3-4 times, whereas Chinese tourists spent 3 days in Slovenia and 3-4 days in Croatia. Tours organised beforehand were usually smaller in number (5-6 people) and thus more personalised. In the case of initiated tours mentioned above the number of participants were twice bigger, between 10-15 tourists.

Promotional tours are a great tool to slightly redirect their travel patterns with the goal to extend the season (avoiding June, July, and August when accommodation capacities are overbooked) that is very appropriate for autumnal South-West Slovenia (coastline and Brda Hills).

Flow story tend to sponsor Slovenia under the slogan “the green heart of Europe”, representing green, cleanliness and sustainability. The word “love” in the country’s name itself it contributes to the unique story of a true paradise of unforgettable moments. “Maybe these hearts, sometimes we really feel are over the top. But from them we always get a positive response, and after that it’s easier to remember. It seems also that providers across the country have recognized this element, so they keep highlighting it.”

4.4 Discussion

The comparison of tourist movements upon their own dynamics in time throughout destination space was the central proposition of this thesis. The data suggests four strategic flows (Figure 12) in character because they are stable, reappearing and well-catered by range of service providers on the supply side, while the other five cause (Figure 13) weak signals that call attention to new opportunities for innovation and for prospering in the future.

As my findings demonstrate, majority of the prevalent Chinese tourists take part in the so-called arranged touring (Packaged GIT) or slightly customised packages (Customised GIT), being a part of in-advance organized trips by local and foreign travel organisers. Those who do participate in group tours are more likely to seek out customized packages presented in SVF 2 that cater to their leisure interests and travelling style. The results show that almost two-thirds of the interviewees experienced this type of travel where Chinese tourists on average stayed over two nights. The differentiation from the SVF 1 in terms of entry/exit point on the destination is it that this particular segment (SVF 2) might also fly in Brnik and accordingly start the tour in Slovenia. Location-wise, tourists in SVF 2 are willing to stay an additional night, and thus visit Piran in addition to top 3 locations.
Another two SVFs associated with business delegations from China are executives and middle management business travellers, in number of flows and sequences often depending on Chinese internal politics (as an opposite for private sector). Corporate travel pursues higher level of top 5* accommodation, which is so far available in Ljubljana alone and besides identify the capital as the favourable crossway point. Middle management travellers from the SVF 4 on the other hand often combine business trip with leisure, and tend to even migrate to one neighbouring country based on visa allowance. Compared to leisure tourists, business tourism flows are not that frequent and big in numbers but still stable, established and thus important. Business executives tend to visit only 2 locations beside the international airport in Brnik, much less than their subordinates, which tend to visit the greatest amount of locations among all SVFs. So, mixture of business and leisure purpose to visit results in visiting all 4 locations comparable to leisure SVF 2, with addition of fly in the country which sums up to 5 locations.

Chinese tourists in Slovenia at the moment predominantly activate routes of the above-mentioned SVFs, which will in the future most likely result in activation of numerous new activity-based NSVFs. The first demonstrations towards these changes in leisure travel are already presented in appearing niche visitor migrations, whereas tourists book services with the promise of unique authentic experiences. In such manner, flows of Chinese tourists within space and time are already trending towards individually customised packages.
The results are built on existing three emerged lifestyle-driven leisure groups of FITs, and two additional tourism flows – one business and one educational. FAM & Press trips are nowadays very common in the new age of influencer marketing, whereas encourage other leisure tourism flows to follow, with focus on segments with special interests. With their coordination Slovenia as a destination can uphold guidance and control, and thus boost promotion of other intra-destination locations, further from already most visited Bled, Ljubljana, and Postojna. Educational trips are on the other opportunity for Chinese students to gain international educational and travel experiences.

Firstly, Slovenian tourism sector has to agree on type of tourists it really wants to serve and accordingly adapt the existing offer to that segment’s requirements, not only in the terms of diverse assortment of products and services. Further, by upgrading the existing general infrastructure, educating personnel working in the tourism and hospitality sectors, and providing sufficient tourism infrastructure to gain Chinese tourists’ attention. In order to adapt to this long-distance tourist market, whose specific characteristics still remain unfamiliar to the majority of the local tourism sector, it would be necessary to become more familiar with Chinese culture and act in the direction of understanding it to the larger extend. In matter of fact, like any other culture’s values and beliefs, behaviour, travel preferences, media and technology usage outline broader view based on which Chinese tourist choose their travel destinations. Only by established understanding of cultural differences travel organisers will be able to propose adequate tourism offer in terms of programmes, thus influence and redirect identified tourism flows driven by the above-mentioned. This study managed to identify numerous potential points towards which Chinese tourists could migrate. Accordingly, there is a need to find the right approaches for distinctive niche segments, and prioritize tourism strategy on FITs exclusively.
Chinese tourists are a very different target group with specific characteristics and needs which have to be fulfilled in order to attract them. They should not represent just another larger number of tourists from additional market, but rather the future driving force of international tourism which is just starting to travel and develop their travel habits. The responsibility of tourism representatives is the attempt to activate and engage Chinese tourists with offering unique experiences to prolong their stay on the destination itself, increase their expenditure, with the goal to return and recommend Slovenia to their family and friends, and in such manner contribute to the local tourism. The objective of any new development should be to enhance the tourism experience with its focus not to bring more Chinese tourists but to prolong the stay of existing ones.

The SGDM and the flow-based perspective can be seen as a meaningful evolution of private and public sector, especially when dealing with such a diverse social phenomenon as tourism is, originating from individual guests with their own cultural-specific needs. With global trend of increasing number of FIT guests, individual approach is to cater these tourists in an economically proven way, with intent to gain highly conscious visitors, ordinated towards sustainability, causing surplus for our hospitality and tourism sector. Concerning the circumstances of the Chinese market’s size and prospective, Slovenian tourism sector must actively engage with this market. In such manner, Slovenia can still open up to become more Chinese-friendly destination and strengthen destination’s competitiveness. Beside domestic attempts, it is decisive to initiate more integrated regional cooperation between the tourist destinations for the successful common positioning on the Chinese tourist market.

As noted before, some of the findings might slightly variate in the bigger sample. However, these results are important, as they highlight travel movements of the recent Chinese tourists. All emerged segments are niches, but in China niches tend to include hundreds of thousands of potential tourists.

Further research is recommended to build upon the existing research by carrying out a focus group to portfolio assessment. As the process continues, it is best to consider both the drawing and associated description of a particular flow as a living tool. Furthermore, there are always new actors on destination that can contribute new knowledge to an SVF maps thus conclude the identification process. To better understand the implications of these results, future studies could involve important actors from neighbouring destinations (Zagreb, Venice, Budapest, and Vienna) to add-on multi-destination perspective. Also as the model’s authors’ advice, however, foreign providers only come into account once the SVFs in a destination have been identified for the first time. At a later stage, additional surveys as well as suitable ICT-based tracking of visitors designed to reconstruct the movement patterns in space and time could be used to further validate and likely better project numbers for specific SVFs.
4.5 Research limitations

Due to labour-intensive and time-consuming nature of the in-depth interviewing process, limitations of this master thesis originate from the fact, that only step 1 and 2 of the 6-step process were fully executed. Bearing in mind these model challenges, the results were not reviewed or discussed with participants, which commonly even in the later stages realize that existing SVF maps need adjustments or point out the existence of new flows that have yet to be considered. Given the repetitive nature of the process this development in perfectly normal, even though necessary.

There are two sample-related problems encountered from the initial time-space geographical mapping. Firstly, particular respondents did provide only limited travel patterns of Chinese tourists, but at the same time brought insight information and additional perspective to this research. Secondly, the majority of maps and fulfilled tables provided relevant information, to minimal extend few were however insufficient. The third limitation is the complexity of the phenomena itself, taking into account the analysing nature of visitors’ behaviour and movement in time and space.

It should be noted that results of this master thesis cannot be generalised to a larger population of Chinese tourists in Slovenia due to limited sample size of qualitative nature, which accounts for the main limitation of this research.

CONCLUSION

Visitor flows are groups of geographical locations that are visited by visitors in a similar sequence in a certain geographical area. For those groups to be considered as visitor flows, they have to be repetitive (Beritelli et al., 2015). Accordingly, the first research dedicated to Chinese tourist market in Slovenia only has been conducted, analysing variable geometry that enables three-dimensional overview over destination and depicts whereby some of the tourists at one-point switch from one to another flow.

This study constructs a three-stage model to examine the relationship between characteristics of a network on the geographical territory of Slovenia and tourism flows of Chinese tourists, and provides some robust evidence using 9 in-depth interviews with crucial actors in tourism field to prove the existence of four SVFs and five NSVFs.

The intention is that we can draw parallels between the segments trying to distinguish Chinese outbound tourist by noticeable characteristics and depict a general view on this such a big and important nation as Chinese are that cannot be generalized any longer. In practice, however, this might not be the easy case. Presented SVFs might not be that that obvious at the first sight, but keeping in mind their travel purpose, style, organisation and activities helps to summarize leisure, business and educational intentions of Chinese tourists. However, although the share of Chinese tourists in global tourist marketing is gradually
increasing, is still cannot be claimed that this market segment is well recognized, examined and understood by creators of tourist offer at global market (nor Slovenia in that manner), what makes the potential of China quite limited also on the local ground.

Taking into consideration that last years’ outbound numbers represent only around 10% of Chinese population, there is no doubt a market with a great potential, that with its’ distinctive characteristics calls for product specification in the modern tourism and hospitality industry. Thus, there is very reasonable tendency towards stable current tourism flows to Slovenia as a European destination, and so activation of the supplementary and potential new ones. In the interest to engage the full spectrum of market segments, there is a need to further understand the Chinese tourist mindset and Slovenian tourism representatives’ knowledge-improvement and eye-opener that for a while “made in China” in tourism service business converted into “made for China”. Chinese tourists present extreme opportunities for range of European SMEs, which does not come without challenges - the only remaining question is, to which extend they will be able to overcome them with appropriate cultural adaptation and benefit from situation.

REFERENCES AND LITERATURE


Appendix 1: Povzetek (Summary in Slovene language)

Kitajski turisti po najnovejših podatkih preplavljajo Evropo in kot najbolj prodoren turistični segment podirajo turistične statistike prihodov in potrošnje globalnih razsežnosti. V zadnjih petih letih je moč zaznati njihovo vsakoletno porast tudi v Sloveniji, kjer smo samo v letu 2018 zabeležili več kot 87.000 prihodov in 136.000 nočitev kitajskih turistov.


Omejitev raziskave izhaja iz velikosti vzorca, zaradi katere rezultati ne morejo biti generalizirani na splošno populacijo kitajskih turistov v Sloveniji.

Ključne besede: turistični tokovi, kitajski turisti, destinacija Slovenija, vizualizacija poti, analiza območja
Appendix 2: Basic definitions

Chapters 2 to 4 of the International Recommendations for Tourism Statistics (IRTS) 2008 by United Nations (2010) describe basic concepts, definitions in the tourism industry, its basic categories and major classifications, as well as statistical measures, and therefore should be consulted to understand better the interrelationships in the following research paper. In addition to IRTS 2008 some basic definitions originate from alternative sources.

16+1 initiative: cooperation between China and Central and Eastern European Countries; the 16+1 format is an initiative by the People’s Republic of China aimed at intensifying and expanding cooperation with 11 EU member states and 5 Balkan countries (Albania, Bosnia and Herzegovina, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Macedonia, Montenegro, Poland, Romania, Serbia, Slovakia, Slovenia) in the fields of investment, transport, finance, science, education, and culture. In the framework of the initiative since 2012, China has defined three potential priority areas for economic cooperation: infrastructure, high technologies, and green technologies. Greece is the first new member to join the group in 2019 – making it 17+1, which now comprises 12 EU member states and 5 Balkan nations that are also slated to join the EU in the future (CEEC-China, n.d.).

Average stay: dividing the total number of nights spent by tourists by the number of arrivals provides the average length of stay, which can be used as an analytical indicator of tourism in a country or region (see IRTS 2008, para. 6.33).

Belt and Road initiative: the Silk Road Economic Belt and the 21st-Century Maritime Silk Road, also known as The Belt and Road, is a development strategy and framework presented by the Chinese government in 2013 that focuses on connectivity and cooperation among countries primarily between China and the rest of Eurasia (but open to all world-wide partners). This global initiative consists of two main components, the overland and the sea routes (Belt and Road portal, 2016).

Destination: the main destination of a tourism trip is defined as the place visited that is central to the decision to undertake the trip. However, if no such place can be identified by the visitor, the main destination is defined as the place where he/she spent most of his/her time during the trip. Again, if no such place can be identified by the visitor, then the main destination is defined as the place that is the farthest from the place of usual residence (see IRTS 2008, para. 2.31).

DMO: destination management/marketing organization is the leading organizational entity which may encompass the various authorities, stakeholders and professionals that facilitate
tourism sector partnerships towards a collective destination vision. The governance structures of DMOs vary from a single public authority to a public/private partnership model with the key role of initiating, coordinating and managing certain activities such as implementation of tourism policies, strategic planning, product development, promotion and marketing and activities. The functions of the DMOs may vary at national, regional and local levels depending on the current and potential needs as well as on the decentralization level of public administration. Furthermore, not every tourism destination has a DMO. It emerges as a key player in the development and management of tourism, with an objective to ensure competitiveness and sustainability within the region (see UNWTO, 2019b).

**EU-China tourism year 2018:** in 2016, the President of the European Commission and the Chinese Premier announced that 2018 would be the EU-China tourism year. By joint efforts of the EU and China National Tourism Administration, this campaign aimed to increase the number of Chinese travellers to the EU (in particular off-season, and in less-known destinations), improve travel and tourism experiences, provide opportunities to increase economic cooperation and create an incentive to make quick progress on EU-China visa facilitation and air connectivity. Due to this initiative the EU rolled out a 16-month programme of cooperative marketing activities designed to promote the development of both sides’ tourism industries, showcase the unique and diverse cultural heritage of the EU member states, and support local authorities in organizing events bringing the European and Chinese communities together. ETC played a leading role in marketing activities targeting China throughout 2018, thanks to its “Joint Promotion Platform” supported financially by the EU, including a major campaign advertising the EU and trans-European itineraries in China (including those linking World Heritage sites), on-line toolkit on how to welcome Chinese travellers, and 10 business to business (B2B) matchmaking events (EU-China tourism year, 2018).

**FAM & Press trip:** short for familiarization trip, influencer marketing campaign, or press trip – is a free (or low-cost) trip often including a salary for travel bloggers, social influencers, travel agents or consultants, paid for or sponsored by a tourism board, travel brand, tour operator, airline or industry conference organizer (Wharton, 2018).

**FIT:** free independent traveller or fully independent tourist refers to type of travel, where tourists prefer more individualistic approach to travel and self-booked itineraries as compared to mass tourism and the promoted pre-arranged packages. FITs usually travel solo, in couples, or in small, intimate groups of friends or family (usually up to 15 persons). Based on wider access to information from home, the internet is the main platform for FIT arrangements and activities in self-paced travel and stops, sometimes facilitated by user-generated content on the social media, online travel agencies and online booking that have strongly impacted the FIT travel planning cycle. Considering word-of-mouth, FITs are generally enthusiasts and off the beaten path explorers (Best hospitality degrees, 2016a). Such itineraries can be based on existing tourism offer, or entirely assembled by the travel
agent when purchasing several tourism products (and services) from different suppliers especially for the FITs – such trips are nowadays called *customised packages*.

**GIT:** group inclusive tour refers to a travel group where individuals buy a group package and travel with others on a present itinerary with a fixed options regarding departure dates. These dependent travellers enjoy structured flexibility, but traditional group tours have a set itinerary for everyone and a set number of travellers (usually minimum of 10 people traveling as a group throughout the tour) – so called *pre-arranged packages*. GIT tourists have usually some common affiliation (although, not always). Tours are usually (although, not exclusively) organised by travel organiser and incorporate services of a tourist guide (although, not necessarily) (Best hospitality degrees, 2016b). GITs are specifically beneficial for those looking for vacations at cheaper rates and are even suitable for the ones travelling alone, as they get the benefit of having a company of few travellers. Travel program usually includes accommodation, dinning, transportation, sightseeing tours, air tickets, insurance and visas (Exotic travel club, n.d.).

**ITB China:** is a special kind of travel fair, targeted exclusively at handpicked B2B visitors involved in China’s travel industry. The three-day trade fair takes place every year and is being accompanied by a strong conference programme, referring to both, business travel, MICE (meetings, incentives for employees, conferences and exhibitions) and leisure travel to international, partly undiscovered destinations including all aspects of travel and travel-related services. The entire event is focusing on business and latest developments of China's travel market (ITB, n.d.).

**MICE industry:** to highlight purposes relevant to the meetings industry, if a trip’s main purpose is business and professional, it can be further subdivided into 1) attending meetings, conferences or congresses, trade fairs and exhibitions, and 2) other business and professional purposes. The term meetings industry is preferred over the acronym MICE which does not recognize the industrial nature of such activities (IRTS 2008, para. 3.20). MICE industry is one of the key drivers of tourism destination development and an important generator of income, employment and foreign investment. Beyond economic benefits, the MICE industry presents opportunities for knowledge sharing, networking and capacity (UNWTO, 2012).

**Outbound tourism:** outbound tourism comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip (IRTS 2008, para. 2.39(c)).

**Package travel:** when you book a package holiday, you buy a combination of two or more different types of travel services for the same trip or holiday. These services can include transport, accommodation, car hire, or under specific conditions any other tourist service. Your package may be *pre-arranged* – consisting of a number of services combined by a tour operator or travel agent – or you may have a more *customised package* by choosing the
services yourself before the contract is concluded. In both cases EU Directive 2015/2302 is applicable.

**Purpose of a tourism trip:** the main purpose of a tourism trip is defined as the purpose in the absence of which the trip would not have taken place (see IRTS 2008, para. 3.10). Each main purpose (except the case of 1.7. Transit) is associated with a group of main activities undertaken during the trip and may be classified as follows (IRTS 2008, paras. 3.14 to 3.17):

1. **Personal.** This category includes all purposes of tourism trips that are not classified as business and professional (see 2. Business and professional below):
   1.1. **Holidays, leisure and recreation.** This category includes, for example, sightseeing, visiting natural or man-made sites, attending sporting or cultural events, practicing a sport as a non-professional activity; using beaches, swimming pools and any recreation and entertainment facilities, cruising, gambling, attending summer camps for youngsters, resting, honey-mooning, fine dining, visiting establishments specialized in lifestyle services (for example, wellness hotels).
   1.2. **Visiting friends and relatives.** This category includes, for example, activities such as visiting relatives or friends; attending weddings, funerals or any other family event: short-term care for the sick or old, etc.
   1.3. **Education and training.** This category includes, for example, taking short-term courses paid either by employers (excluding “on-the-job” training classified in Business and professional) or others, which should be identified separately, where relevant (see para. 2.66); following particular programmes of study (formal or informal) or acquiring specific skills through formal courses, including paid study, language, professional or other special courses, university sabbatical leaves, etc.
   1.4. **Health and medical care.** This category includes only short-term treatments, for example, receiving services from hospitals, clinics, convalescent homes and, more generally, health and social institutions, visiting thalassotherapy and health and spa resorts and other specialized places to receive medical treatments when they are based on medical advice, including cosmetic surgeries using medical facilities and services.
   1.5. **Religion/pilgrimages.** This category includes, for example, attending religious meetings and events, pilgrimages, etc.
   1.6. **Shopping.** This category includes, for example, purchasing consumer goods for own personal use or as gifts except for resale or for use in a future productive process, (in which case the purpose would be Business and professional), etc.
   1.7. **Transit.** This category consists of stopping at a place without any specific purpose other than being on route to another destination.
   1.8. **Other.** This category includes, for example, volunteer work (not included elsewhere), investigative work and migration possibilities; undertaking any other temporary non-remunerated activities not included elsewhere, etc.

2. **Business and professional.** This category includes the activities of the self-employed and employed individuals as long as they do not correspond to an implicit or explicit employer-employee relationship with a resident producer in the country or place visited, those of
investors, businessmen, etc. It also includes, for example, attending meetings, conferences or congresses, trade fairs and exhibitions; giving lectures, concerts, shows and plays; promoting, purchasing, selling or buying goods or services in the name of non-resident producers (of the country or place visited); participating in foreign government missions as diplomatic, military or international organization personnel, except when stationed on duty in the country visited; participating in non-governmental organization missions; participating in scientific or academic research; programming tourism travel, contracting accommodation and transport services, working as guides or other tourism professionals for non-resident agencies (of the country or place visited); participating in professional sports activities; attending formal or informal on-the-job training courses; being part of crews on a private mode of transport (corporate jet, yacht, etc.), etc.

**Tourism expenditure:** tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others (IRTS 2008, para. 4.2).

**Tourist or traveller (or overnight visitor):** a visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor), if his/her trip includes an overnight stay (spend at least one night in a hotel or some other accommodation establishment), or as a same-day visitor (or excursionist) otherwise (IRTS 2008, para. 2.13).

**Travel group:** a travel group is made up of individuals or travel parties travelling together: examples are people travelling together on a trip (on the same package tour) and whose expenditures are pooled. Although many characteristics of visitors can be separately identified for each individual member of a travel party, some of them might not be so identified, as in the case of economic variables (see IRTS 2008, paras. 3.2 to 3.5 and 4.36).

**Trip:** a trip refers to the travel by a person from the time of departure from his usual residence until he/she returns: it thus refers to a round trip. A trip is made up of visits to different places (IRTS 2008, para. 2.7).

**Visit:** a trip is made up of visits to different places. The term “tourism visit” refers to a stay in a place visited during a tourism trip (IRTS 2008, paras. 2.7 and 2.33).

**Visitor:** a visitor is a traveller taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. These trips taken by visitors qualify as tourism trips. Tourism refers to the activity of visitors (IRTS 2008, para. 2.9).
Appendix 3: Literature review summary table

<table>
<thead>
<tr>
<th>Study, year</th>
<th>Methods, concepts or technologies used</th>
<th>Country of research</th>
<th>Implementation, relevant findings, limitations</th>
</tr>
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<tbody>
<tr>
<td><strong>Observational methods</strong></td>
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<tr>
<td>Keul, Kühberger (1997)</td>
<td>Basic tracking study of non-participatory observations, non-participatory</td>
<td>Salzburg, Austria</td>
<td>- Visitor preferences strongly influence their touristic behaviour.</td>
</tr>
</tbody>
</table>
- Both methods have disadvantages, none is sufficient on its own: they are time-consuming, raising ethical questions and validity.  
- Non-participatory provides a lot of information, but it fails to unveil the purpose and meaning of visitor’s decisions and activities. |
| **Space-time budget techniques** | | | |
| Debbage (1991) | Time-budget study: participants recalled temporal sequence of activities and its locations fulfilling questionnaires designed into travel diaries, participatory | Paradise Island, Bahamas | - The space-time constraints are found to be more important than the socio-economic descriptors in explaining the different typologies of spatial behaviour. |
| Fennell (1996) | The space-time (budget) model of tourism group behaviour: participants completed one space-time budget sheet per day, including time-recordings and spatial movement mapping, participatory | Shetland Islands, United Kingdom | - Model needs further improvement, theoretical and methodological, but serves as a pilot project: tourist may be classified from the gathered data instead of prior to data analysis, extensive information need from respondents, effective but costly and time consuming for researchers.  
- Limited use of modern technology in tourism research, presented idea of radio telemetry usage (used for wildlife movement behaviour tracking). |
| Xia, Zeephongsekul, & Arrowsmith (2009) | Markov Chains methodology: self-administered questionnaires (to gather vital information), participatory | Phillip Island, Australia | - Effective method to provide information on tourist movement patterns on micro and macro level, used to analyse trends and series of events linked by first-order dependence.  
- Results assisting park managers in developing better tourist packages. |
| Smallwood, Beckley & Moore (2012) | Site-base interviews: spatio-temporal information on patterns of recreational use with face-to-face interviews either during or after activity, mainly containing closed-ended questions; in addition, location of interviews was geo-referenced with GPS and followed by questions on visitor characteristics, participatory | Ningaloo Marine Park, Australia | - First study of a static movement pattern within remote destination.  
- Benefits of the face-to-face interviews: high response rate and rounding bias.  
- Visitors were highly dependent on the road network. |
| Bujosa, Riera, & Pons (2015) | Site-base interviews: face-to-face interviews after the activity, gathering information about the trip itself, the recreation activities during visitor stay and basic demographic details; participatory | Mallorca, Spain | - In-depth change in demand for mature destinations can be understood with studies examining micro data.  
- Higher the number of business related to tourism activity, the larger will be the production of beach trips.  
- The higher the number of beds in medium and high-quality accommodation establishments, the lower the number of beach trips caused by a location. |
| Pettersson, Zillinger (2011) | GPS devices in combination with follow-up questionnaires (offering background information about participants and their experiences) and overview camera, participatory | Östersund, Sweden | - Methods complement each other is a useful way.  
- GPS collected data is highly reliable, but GPS method is time-intensive for researcher during the event.  
- Photography offers a cost-effective alternative when studying open-air events, applicable during daytime, providing anonymous macro-scale mobility. |
| O’Connor, Zerger & Itami (2005) | Alge timing system: measuring constant speed of travel between sensors and generalising the path as a straight line, or a number of straight lines; non-participatory | Victoria, Australia | - The Alge technology is ideally suited to collecting travel itineraries in day use recreation environments since it tracks individuals and records precise arrival times.  
- Results in relatively uniform duration of time spent at the site between individuals.  
- Further research of tourist behaviour in peak periods impacting time-spent in particular regions or at entire site, whereas battery life and data capacity are main limitations. |
| Edwards, Griffin (2013) | GPS devices, supplemented by semi-structured interviews (to explain their movement patterns), participatory | Sydney and Melbourne, Australia | - Participants included domestic and international tourists.  
- Resulting visual maps provided destination managers with valuable diagnostic tool how tourists moved around each city  
- Labour-intensive method.  
- Employed methods could be used for model scenarios for predicting spatial interventions (ticketing, location of services). |

**GPS and land-based tracking systems**

| Pettersson, Zillinger (2011) | GPS devices in combination with follow-up questionnaires (offering background information about participants and their experiences) and overview camera, participatory | Östersund, Sweden | - Methods complement each other is a useful way.  
- GPS collected data is highly reliable, but GPS method is time-intensive for researcher during the event.  
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<table>
<thead>
<tr>
<th>Authors</th>
<th>Methods</th>
<th>Location</th>
<th>Highlights</th>
</tr>
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</table>
| Shoval, McKercher, Birenboim, & Ng (2015) | GPS devices, participatory                                               | Hong Kong, Special Administrative Region of China | - Creation of tourist typologies based on analysis of movement patterns.  
- Repeat patterns of activity can be detected even for diverse groups (enhanced segmentation).  
- The types of day trips taken by tourists can be easily identified. |
| Reinau, Harder, & Weber (2015)   | SMS-GPS-Trip method: GPS device, respondents sending start- and stop-SMS, participatory | Copenhagen, Denmark               | - Method is capable of collecting mode information.  
- Method is cheap and easy to implement, since most people own a mobile phone, providing validated data. |
| Yun, Park (2015)                 | GPS-based smartphone application, participatory                          | Gun Area, South Korea             | - Use of participant’s own smartphone devices.  
- Main advantage is simplicity of method used, providing accurate and successive data on space and time for tourist-behaviour studies.  
- Ethical problems of tracking tourists may emerge even though participants agree to participate in the survey. |
| De Cantis, Ferrante, Kahani, & Shoval (2016) | Combination of GPS devices and questionnaire-based survey (to understand experience and behaviour of cruise passengers in urban destination), participatory | Palermo, Italy                    | - GPS devices allow several types of analysis: classification and analysis of routes, visitors, attractions, itinerary, etc.  
- Integration of traditional and modern methods of data collection allows to build up theories on (individual) complex human behaviour.  
- Use of obtained indicators of spatial behaviour at the destination allows further segmentation of cruise passengers based on their activities, leading to the improvement of services offered to visitors by the destination (from public and private prospect). |
| Shoval, Isaacson (2007)          | Experiment 1: GPS devices (Bluetooth-GPS receiver and pocket PC), participatory | Heidelberg, Germany               | - Article presented results of three experiments, each use one or more of the three principal tracking technologies available that time.  
- Main advantages of methods used: TDOA technique has no need a direct line to the sky, GPS devices obtain more accurate data over land-based tracking methods which makes them more suitable for micro-level investigations, providing high-resolution data.  
- Further research should tackle ethical questions concerning the chosen methods. |

Experiment 2: comparison among cellular triangulation, GPS, and the hybrid tracking system assisted GPS (AGPS), participatory  
Experiment 3: land-based TDOA tracking system, participatory
<table>
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<tr>
<th>Authors</th>
<th>Methods</th>
<th>Location</th>
<th>Findings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birenboim, Reinau, Shoval, &amp; Harder (2015)</td>
<td>GPS devices and real-time phone messages (SMS), participatory</td>
<td>Aalborg, Denmark</td>
<td>- Combination of methods results in ability to geotag experiences of visitors throughout the destination. - Experience and satisfaction in a zoo are influenced by the type of animal, interaction or the physical characteristics of exhibitions. - Site managers should focus on early stages of the visit to enhance the overall experiences of the visitors. - Advisable that future works include structured forms and surveys that incorporate multiple choice and Likert-scale like questions, which are more straightforward and easier to interpret (like open questionnaires and self-interpretation of SMS used in this study).</td>
</tr>
<tr>
<td>Bauder, Freytag (2015)</td>
<td>GPS devices and questionnaires, participatory</td>
<td>Freiburg, Germany</td>
<td>- Exploring mobility patterns of well-prepared and not well-prepared same-day visitors. - Knowledge on specific characteristics allows tourism professionals to develop target-oriented services to avoid overcrowding effects and foster a slight spatial deconcentration of visitor activities.</td>
</tr>
<tr>
<td>Versichele, De Groote, Bouuaert, Neutens, Moerman, &amp; Van de Weghe (2014)</td>
<td>Bluetooth tracking technology: ad-hoc Bluetooth sensor network build-in among 14 tourist attractions sensing the visitors’ mobile devices, non-participatory</td>
<td>Ghent, Belgium</td>
<td>- Study distinguishing among travellers and locals. - Main limitations: errors on tracking activities, potential bias in the sample, lack of meta-data. - Further research on identifying travel patterns is needed.</td>
</tr>
<tr>
<td>Raun &amp; Ahas &amp; Tiru (2016)</td>
<td>Mobile positioning data of foreign visitors: roaming data of the foreign mobile phone call detail records (gathered through access to the anonymised passive mobile positioning data of Estonia's largest mobile telephone operator EMT), non-participatory</td>
<td>Saare and Tartu, Estonia</td>
<td>- Tourism destinations have five measurable dimensions: spatial, temporal, compositional, social and dynamic. - Social media datasets are becoming further tool to complement the social dimension.</td>
</tr>
<tr>
<td>Zhao &amp; Lu &amp; Liu &amp; Lin &amp; An (2018)</td>
<td>Mobile tracking data: the dataset is anonymous mobile tracking data, collected from three mobile operators in Xi'an - China Mobile, China Unicom and China Telecom - without violating users' privacy, non-participatory</td>
<td>Xi'an, China</td>
<td>- With comprehensive coverage and little collection cost, mobile tracking data has great potential to describe tourist movements. - Overlapping signals and spatial coarseness can be problematic.</td>
</tr>
</tbody>
</table>

**Digital space-time techniques**

- **Versichele, De Groote, Bouuaert, Neutens, Moerman, & Van de Weghe (2014)**: Bluetooth tracking technology uses an ad-hoc Bluetooth sensor network built-in among 14 tourist attractions, sensing visitors' mobile devices, non-participatory.
- **Raun & Ahas & Tiru (2016)**: Mobile positioning data of foreign visitors includes roaming data of the foreign mobile phone call detail records, gathered through access to the anonymised passive mobile positioning data of Estonia's largest mobile telephone operator EMT, non-participatory.
- **Zhao & Lu & Liu & Lin & An (2018)**: Mobile tracking data is anonymous mobile tracking data, collected from three mobile operators in Xi'an - China Mobile, China Unicom and China Telecom, without violating users' privacy, non-participatory.

Table continues
| Data-mining techniques | Rome, Italy | - User-originated digital footprints were used, able to identify nationalities of many users.  
- Based on the time stamp and location of photos tourists’ movements were reconstructed.  
- Several limitations due to use of mobile data only, as well as privacy and ethical concerns.  
- Further development is required to validate observations and gain new insights. 
Kádár (2014) | 16 European cities, presented Vienna, Prague and Budapest | - City-level patterns drawn showed visibility of the main attractions (local and classical touristic) and routes visited by tourists, correlating with tourism statistics in all three cities with strong urban systems.  
- Comparison of urban system is much harder and inaccurate with other methods.  
- Method need further enhancement. 
Chua & Servillo & Marcheggiani & Moere (2016) | Cilento, Italy | - New sources of geotagged information derived from social media data is promising but more insights are necessary.  
- Data biases and methodological limitations when drawing conclusions from analytical results should be considered: user penetration, reliability. 
Knežević Cvelbar, Mayr, & Vavpotič (2018) | North East Adriatic region | - Pioneer research using this approach for spatial behaviour of tourists in destination management studies.  
- Shared online data is growing and it is easily assessable.  
- Major limitation is possibility to observe only behaviour by visitors sharing their traveling details on web platform. |
Appendix 4: Respondents’ quotations table in English and Slovene

Respondents’ answers are written literally, therefore the language of their answers is stylistically marked (spoken language). (Odgovore intervjuvancev sem zapisala tako, kot so odgovarjali, torej jezik njihovih odgovorov stilsko zaznamovan (pogovorni jezik).)

<table>
<thead>
<tr>
<th>English</th>
<th>Slovene</th>
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<tbody>
<tr>
<td>“That’s why Postojna is great. Since you are there for a specific time, you know how long it will take. Once you get out you have a toilet, few restaurants. It is close to the highway, and this is ideal for Chinese tourist and the tourist agencies. Everyone wishes to make every destination as such. This setting is ideal for them, while they are just so used to it. In Slovenia, we are not used to this, and in my opinion this is even better if you ask me. You should then take at least one additional night in Slovenia to get something else. This is totally clear why these three, due their infrastructure. And because of the closeness.”</td>
<td>“Ja, ravno zato je Postojna top. Ker imaš tam točno določeno uro, veš, koliko časa bo trajalo. Prideš ven, tam imaš WC, neke restavracije. Ful blizu avtoceste je in to bi bilo njim idealno, in agencijam in vsem, da bi bla vsaka destinacija taka. To bi blo pač idealno, ker oni so pač navajeni tega. V Sloveniji pač nimaš tega, sej vemo in še dobro, če mene vprašaš. Treba si je potem vzeti še eno noč v Sloveniji, da dobiš nekaj drugega še. To je čist logično, zakaj so te tri, zaradi infrastrukture ne... čist enostavno. Pa zaradi bližine.”</td>
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<tr>
<td>“Unfortunately some Prekmurje with its flatland won’t fascinate them much. There is still nothing to do in Dolenjska … Ribnica and Suha Krajina will never get promotion, while there is no tourist attraction to build upon. Chinese tourists seek for story put together with a little kitsch next to it. This is a winning combination.”</td>
<td>“Žal kakšno Prekmurje s svojo ravnino jih najbolj ne fascinira gleh. Na Dolenjskem se še nič ne dela … te Ribnica, Suha krajina se ne bo nikol spromoviral, ker ni dovolj nobene atrakcije, da bi se lahko na tem gradil. Oni rabijo neki, kar lahko zgodbo napleš pa mal kica zraven pa je to zmagovalna kombinacija.”</td>
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<td>“I've never seen someone going to Škofja Loka. The problem is also that at the beginning of a tour it might still be an option to visit it. The problem is when you see two or three churches, even though here in Slovenia it is still quite diverse. When in Croatia there is always: the sea, the church, the walls, and then 5 days of it. And for Chinese this is all the same, I understand. But just as you suggested, maybe we should do something with natural parks. I don’t know if they would really like it. I already feel inappropriate to only translate content because it's all the same.”</td>
<td>“Škofjo Loko še nisem nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl nikoli videl 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<td>&quot;The country’s size is certainly an advantage, because it is more feasible that way. Chinese tend to have really busy schedules, so they can fit the main activities into 2-3 days without any logistical problems. In addition, Slovenian roads are okay, which is still not the case across the Balkan countries.”</td>
<td>&quot;Prednost je sigurno mejhnost, ker je obljadljiva. Njim, ker se jim res precej natpra urnik, lahko brez nekih logističnih težav strpa glavne aktivnost v 2-3 dni. Pa recimo kr uredu avtocestni križ, kar je nekje na Balkanu še težava.”</td>
</tr>
<tr>
<td>&quot;It is true, however, that the Chinese are quite pragmatic. They will certainly not fly several thousand kilometers because of one small country, so they always combine it as a part of something bigger.”</td>
<td>&quot;Res je pa da Kitajci so dost pragmatični, oni zaradi ene mejhne države ne bodo prileteli več tistoč kilometrov, zato oni vedno združujejo kot del nečesa večjega.”</td>
</tr>
<tr>
<td>&quot;Surely there is an opportunity for Slovenia, but we are not attractive enough for such a large market as China … It is not clear to us what to do if we have to do it.”</td>
<td>&quot;Definitivno je priložnost Slovenije, ampak tle pa smo posamezni subjekti premalo atraktivni za tak velik trg, kot je Kitajska … Mi ni najbolj jasno, kaj bi bilo treba nardit, če je sploh kej treba naredit.”</td>
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<tr>
<td>&quot;Maybe for current travelling generation we are promoting the wrong stories, but for this younger generation with more awareness, there are so many interesting stories in the global sense … even though we are the 9th most desirable world destination … but more recognizable cities to Chinese alike Venice, London, and Paris are still there. Ljubljana is having a hard time sidestepping to Paris, Versailles or Venice, but as a country it may be a little easier.”</td>
<td>&quot;Mogoče za to generacijo, k potuje velik, niso to taprave zgodbe, za to mlajšo generacijo z več zavedanja pa je v globalnem smislu toliko zanimivih zgodb … čeprav smo mi na 9. mestu najbolj zaželjenih svetovnih destinacij, ampak še vedno so Benetke, London, Pariz njim prepoznavna mesta. Ljubljana težko stopi ob bok enmu Parizu al pa Versalliu, al pa enim Benetkam, kot država pa že mogoče malce malce lažje.”</td>
</tr>
<tr>
<td>&quot;Being present one year on such a big market like Chinese, and expect the whole new segment to open up to you just like that, precisely the kind of upper-class that we all seek for, this takes time. Like I said, we've been active for 9 years now, and it seems that things are a little different now. We can see this change, in such a positive trend. The positive trend in terms of arrivals and overnight stays has been around since day one. But the positive trend in terms of their interests in something beyond these main locations, and their longer overstays, this is just starting to happen. And it's so nice to observe it.”</td>
<td>&quot;Eno letojit na en trg, kot je Kitajska, in pričakovat, da se ti bo odprl cel en nov segment, prav tistih tazgornjih, ki bi si jih vsak želel, to traja. Sej pravim, 9 let je zdej, da so stvari mal drugače, da vidimo to spremembo, en tak pozitiven trend. Pozitiven trend v smislu prihodov in noči tev je itak od prvega dne, a ne. Ampak pozitiven trend, to da jih zanima izven teh glavnih lokacij tudi še kaj drugega in pa da ostajajo dalj, to se šele začenja, a ne. In to je lepo videt.”</td>
</tr>
<tr>
<td>&quot;It seems to me that cities with strategically strong position are still relying exclusively on their location and have no particular desire to serve only the Chinese tourists. In Portorož, they are fully occupied, with them coming or not… they probably don't have a terrible desire. For most of the hotels and destinations is the most important only the fact that they are occupied, no matter what guest structure is. But there are probably several smaller cities with the interest to attract tourists and they see Chinese guests as an opportunity to grow. I would more say that powerful locations, not that they don't want to connect with others, but simply they don't feel the need to. Because they are already fully occupied, if they change their behaviour or not.”</td>
<td>&quot;Se mi zdi, da kakšna mesta, ki so lokacijsko bolj močna se še vedno zanašajo na lokacijo in nimajo neke posebne želje, da bi imeli pa samo Kitajce. V Portorožu so polno zasedeni, pa če oni pridejo al pa ne … verjetno oni nimajo strašne želje. Večini hotelov in destinacij je važno, da imajo polno ne glede na strukturo gostov. So pa verjetno manjša mesta, ki pa si želijo turistov in vidijo kitajške goste kot možnost za povečanje. Jst bi bolj tko rekla, da lokacijsko močna mesta, ne da se nočejo povezav, ampak enostavno ne čutijo potrebe, ker so že tako polno zasedena, pače kej naredijo al pa ne.”</td>
</tr>
</tbody>
</table>
“Look here, there is a great deal of individualism and, on the other hand, too much concentration of sleeping capacities and these actors on the one hand, because they can always dictate prices. On the other hand, bottleneck is disconnection. Now, of course, how to encourage this connection ... Someone from the coast will not be interested in what is happening in Murska Sobota.”

“Yes, Chinese agencies come to us through local agencies, Slovenian and Croatian. However, there is a great selection already in how willing they are the local agencies to make a quality sight. Let’s say the Zagreb agency that has these tours, they constantly book with us ... the most expensive service possible ... different agents have different approaches and we also have different types of visitors.”

“We are searching and trying if it will pick up on the Chinese market because it is a little specific, you won’t know until you don’t try ... it may be that the Skocjan Cave is more authentic than the Postojna Cave, but then they also like the train ... But the problem with them is, what else to show them what they do not have at home. Because they already have everything artificially made at home. As you would call this Instagramability, this is what it is.”

“With Chinese guests, it’s a little harder to plan for them to come back, but maybe they will. To introduce them to those ‘must see’ points, change a little of this habit, which is actually very difficult. Because the majority is already coming up with what kind of itineraries they will do, we always come up with some innovations in this regard. It is always a challenge ... but not adjusting, but how we really make the initial offer friendlier for them. That there we have some inscriptions in Chinese, that we have the ability to pay, that we have materials in Chinese. If we don’t provide this, then they will find their way, but then this is not something we would like to have.”

“We also focus on really showing them what is more appropriate for a Chinese guest, what are those experiences that can make them stay longer ... Basically, these products, which are not made for them, but more easily accessible for Chinese guests in this sense.”

“It’s not this classic summer season similar to Europeans. Again, it doesn’t matter to them, they don’t swim, they don’t sunbathe, again this aspect of the sea is not that essential.”

“Glejte, tukaj je prisoten velik individualizem in na drugi strani prevelika koncentracija spalnih kapacitet in teh akterjev na eni strani, kar potem vedno diktira cene. Po drugi strani pa je ozko grlo nepovezanost. Zdej seveda, kako to povezanost vzpodobit ... Nekoga iz obale ne bo zanimalo, kaj je v Murski Soboti.”

“Ja, kitajske agencije prihajajo do nas preko lokalnih agencij, slovenskih in hrvaških. Tle se pa pa dostav velika selekcija že pri tem, koliko so pripravljene narest lokalne agencije za to, da je res kakovosten ogled. Recimo zagreških agencija, ki ima te ture, oni konstantno pri nas rezervirajo ... najdražjo možno storitev ... različni agencije imajo različne pristope in imamo tudi različne tipe obiskovalcev.”

“Mi potem iščemo in probamo, če se bo prijel na kitajskem trgu, ker je mal specifičen, ne veš, al se bo … sej mogoče Škocjanska jama je lahko bolj avtentična kot Postonjska, ampak njim pa je potem tudi fajn vlakec pa tko … so hoteli tud ta Maribor pa vinsko trto spromovirat, kotori bi lahko bla zgodba, pa tko je oni niso znali dobri predstaviti. Pa problem je ted pri njih, kaj jim še pokazat, kar oni nimajo doma. Ker majo že vse umetno narejeno doma. Kokr bi pri nas rekl si Instagramabilnost, za to se gre no.”

“This is a problem with the Chinese market, but you have to decide. You have demand, but the hotels are full. They do not yet understand these issues, they are quite stuck in this and we want these hotels, at their prices ... money is not really a problem, but they like to negotiate.”

“To je problem s kitajskih trgom, ampak ti se moraš odločiti. Sej imaš povpraševanja, ampak hoteli so polni. Oni še ne dojemajo te problematike, oni so precej zapuščeni v te in te hotele hočno, po svojih cenah … denar v resnici ni problem, ampak oni se radi pogajajo.”

“There is a great deal of individualism and, on the other hand, too much concentration of sleeping capacities and these actors on the one hand, because they can always dictate prices. On the other hand, bottleneck is disconnection. Now, of course, how to encourage this connection ... Someone from the coast will not be interested in what is happening in Murska Sobota.”

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“It’s not this classic summer season similar to Europeans. Again, it doesn’t matter to them, they don’t swim, they don’t sunbathe, again this aspect of the sea is not that essential.”
"Which means you don't get the accommodation, that's the main problem and we all know it … Yes, central Slovenia absolutely, but by that I mean from Ljubljana to Bled. There is almost no space for new hotels in Bled … in the vicinity of Ljubljana they are currently in the process of building new ones … because, for example, the Chinese have no problem sleeping 30 kilometers outside the city. For example hotels on higher level in Kranj, Grosuplje and its surroundings are missing."

"It's getting better and better. Many times they even ask themselves, you immediately notice those who are used to Chinese guests … in the restaurant for instance they immediately ask if they would like to have water, whether it's hot or cold. That's the first difference."

"We're trying hard, but what we are lacking are these direct air connections. So tourists will almost always come to the surrounding airports, except for business. But I'm not sure this will change anytime soon, because foreigners are already complaining about it. Nevertheless, road infrastructure is okay, but how to get here first…"

"Then they are so angry because there is no such police protection at the centre... This is huge, I hear about theft two-three times times a week. At least 2-3 groups a week certainly only among my customers. Imagine including other tourists. They probably know that the Chinese carry around money. This is a very bad advertisement for Slovenia."

"These are more banalities on the trips that cause us getting complaints from their sides and we have to deal with them. In order to say that they are only complaining about the destination … it is important to them again that they are on the lake side of Bled, that they have the sea-view on the seaside, that they have the same type of rooms for all tourists... so if this is guaranteed they are satisfied."

"For anyone who has ever visited China, they know that everything is done over the phone. It is important to Chinese tourists that they have enough money. Sometimes, even with these Chinese plastic cards they have some limitations. But with mobile and electronic payments they of course also spend. There are examples of good practice across Europe, where it is already widely introduced that daily consumption has also increased significantly. They are more used to the process itself, plus they immediately know how much they spent in the local currency. So, it will certainly be great, but it will probably also take time for this payments to build up."

"However, this spring, when we were announcing the possibility of Alipay payments in Ljubljana, we received a lot of approval."

"Kar pomeni, da ne dobiš nastavitev, to je glavni problem, to vemo vsi … Ja osrednja Slovenija absolutno, ampak s tem mislim od Ljubljane do Bleda. Ceprov na Bled skoraj ne spraviš več hotelov … v okolici Ljubljane, sej zdej gradijo še nekaj … ker recimo Kitajcem ni problem spit 30 kilometrov ven. Kakšen bolj na nivoju hotel recimo v Kranju, Grosupljn in okolici."

"Postaja vedno boljše. Dostirak te že sami vprašajo, takoj vidiš tiste ki so navajeni kitajskih gostov ... Pa v restavraciji me tudi npr. takoj vprašajo če bi recimo imeli vodo, aL bi vročo ali hlado, že to je razlika."

"Ja, lej, sej mi se trudimo, ampak, kar nam zmanjka so te letalske povezave, da bodo skoraj vedno prišli na okoliška letališča, razen za biznis. Ampak to ne vem, če se bo kaj spremenil, sej to se tujci že tko na splošno pritožijo. Kokr je potem ureda ta cestna infrastruktura, pridit do tja …"


"To so bolj banalnosti na poti, zaradi katerih dobivamo pritožbe oz. se moramo z njimi ukvarjati. Da bi zdej rekla da se nad destinacijo samo pritožujejo … njim je spet važno to, da so na Bledu na strani s pogledom na jezero, da so na morju s pogledom na morje, da so za vse sobe enake … zdej če je to zagotovljeno, so zadovoljni."

"Za vse, ki so že kdaj obiskali Kitajsko, vedo, da vse preko telefona poteka. Njim je pomemben občutek, da imajo dovolj denarja. Zdej, včasih tudi s temi karticami kitajskimi imajo mal omejeno, s temi plačili preko telefona, elektronsko plačevanje, pa potem seveda tudi trošijo. Zdej so že primeri dobrih praks po Evropi, kjer je tudi to že širše uvedeno, da se je tudi poraba dneva potem precej povečala. Bolj jim je domače, vedo koliko, takoj dobijo in vedo, koliko je to v lokalni valuti tudi bilo, tako da bo pa to sigurno super, tudi to pa je verjetno en proces, da bo tudi to zaživelo."

"Smo pa letos spomladi, ko smo že napovedovali, da bo možno plačevanje z Alipayom v Ljubljani, naleteli na res veliko odobravanje."
"There are multiple possibilities and it seems to me that there is no such thing as to say, that none of them is really not in the interest of Chinese tourists. I think every single thing, if you present it in the right way and combine it with other products can be sold. Not only to remain with the existing offer, but to encourage joint products."

"Yeah, because it's a really busy schedule. Not in the way that we Europeans travel, I would say. They know to reach distance from Zagreb to Mostar as nothing in a day, but in the meantime, to stop in Plitvice and some other city like Zadar, which is quite a classic … and sightsee at everything in between. To visit all this locations in one day is a science fiction, but the Chinese know how to do it."

"This is more for those guests who don't need the group leadership, but younger people who want to travel we can make things easier for them … like their Ctrip so that they can get things done through this … they are so used to paying with WeChat … we would like to arrange something with several Chinese restaurants accross the Balkans, while Chinese people really know each other in the region, they are really connected community … to give these FIT guests a whole spectrum, we haven't define them yet, so far this are ideas only …"

"The agencies are not expected to immidiately change all their programs within a year and take their customers to Ljutomer or Jerusalem. But for individual guests we can afford that."

| "There are also many people who return to the Balkans. For example, those who have already been on one tour before, and now they seem to be able to do it second time themselves. Or they decide to visit only one destination in detail." | "They are not looking for a better lunch, they are looking for the closer one (Chinese restaurant)."
| "The outlines of these tours are already pre-set. They just continue to take part one after another by certain rules … then we also have permanent partners, which can be noticable at choices of hotels and restaurants in these destinations … why these particular locations, the typical ones that would be presented in the classical tourism guide they are even then promoted." | "They are looking for the closer one (Chinese restaurant)."
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“They are always really excited here, and we believe that these experiences in Slovenia are the tool to attract them and pull them back another time. It is one thing when you live the experience day after a day, which piles up and it stays with you even after you return back home. So yes, those experiences are for sure.”

“They read everything on the internet. Then they ask me for Slovenian food, I recommend them venison … They look at bigger cities. If he comes from China, he looks sightsee only Bled, Ljubljana and Postojna. Those who come from the surrounding countries then go also to Piran, Portorož, Lipica, and Ptuj. They stay in Slovenia for several days, mostly for 2-3 nights.”

“This year, very interesting, we also had one Chinese agent, who was particularly interested in this wellness, spa, health tourism, for example she chose this … In addition to Terme Olimia, Rimske Terme, they went towards Radenci. Then one chose a gastronomic tour, where we also took them to Brda. But I think we had one on the active one as well. So that was it, just about everyone went into their own segment.”

“Maybe these hearts, sometimes we really feel are over the top. But from them we always get a positive response, and after that it’s easier to remember. It seems also that providers across the country have recognized this element, so they keep highlighting it.”

“Tukaj so res vedno navdušeni in mi verjamemo, da so ta doživetja v Sloveniji to na kar jih lahko dobimo, in jih lahko ponovno povlecemo. Ena zadeva je, ker zadevo vidiš in drug dan še eno drugo in se to nalaga in to ostane s tabo. Tako da ja, ta doživetja sigurno.”

“Oni si vse preberejo na internetu. Vprašajo me potem po slovenski hrani, jim priporočam divjačino … Oni gledajo večja mesta. Če pride iz Kitajske, pogleda samo Bled, Ljubljano pa Postojno. Tisti, ki pa pridejo iz okoliških držav, pa gredo potem še v Piran, Portorož, Lipico, tudi na Ptuj grejo, oni so več dni tukaj. 2-3 noči največ ostanejo tukaj.”

“Letošnje leto, zelo zanimivo, smo imeli tudi eno kitajsko agentko, ki jo je predvsem ta wellness, spa, health tourism zanimal, ona si je recimo izbrala to … Poleg Term Olimije, Rimskih term so šli še proti Radencem. Si je eden potem izbral gastronomsko turo, a ne, kjer smo jih med drugim peljali tudi v Brda. Pa mislim, da smo imeli enega tudi na aktivni. Tako, da to je bilo, čisto vsak je šel v svoj segment.”

“Mogoče ta srca, in nam je mogoče že včasih over the top, ampak enostavno, ko jim ti to poveš, je res odziv: o res, o Slovenija. Vedno je odziv pozitiven in po tem si tudi lažje zapomnijo, a ne. Sej se mi zdi, da so tudi ponudniki po celi državi prepoznali, da je to ena zadeva, ki vleče, in potem tudi to izpostavljajo.”
I, Petra Kocjan, promise to adhere to the procedures described in this consent form.

Researcher’s signature: ___________________________         Date: ________________________

Thank you for agreeing to participate in my research. Your voice is important.
Appendix 6: Interview Guide in English

INTERVIEW GUIDE: IDENTIFICATION OF TOURISM FLOWS OF CHINESE TOURISTS IN SLOVENIA

In front of you there’s a map of destination Slovenia. Imagine visitors who visit the country area. Single day represents the basic unit the individual tourists use to plan their trip. They can stay only for a day, or they accordingly plan a several day-trip options during their longer stay. In any case, take the visitor day as a point of reference and describe their activities during that one day. In the meanwhile, I will fill-up the tables that are explaining the meaning of the maps.

Describe all existing routs of Chinese tourists in Slovenia.

DESCRIBE FOR EACH TOURISM FLOW YOU DRAW

1. Describe from where are visitors coming from? Are they coming from neighbouring countries and places, are they coming straight from the airports in the region? Are they coming from Zagreb, Vienna, Venice …? Where do visitors enter Slovenia?
2. Why they come? What is their purpose of visit, what motivates them to travel to Slovenia?
3. Which areas they visit in Slovenia? On the map draw their travel flows. Use the arrows to mark their travel routes, places and cities they visit. Describe carefully what they do.
4. When do visitors come time-wise (in the year, in the day)? How much time they spent in one area?
5. Where do visitors go next? Do they continue travelling to other countries or do they return to the starting point? Where do visitors exit Slovenia?
6. How you would describe them? Please describe them carefully. From which region/city from China they are coming from?
7. How developed is this tourism flow? Is this a new travel route or is this a well-developed constant travel route?

CONVERSATION ABOUT DRAWN TOURISM FLOWS

8. Which of the tourist flows you draw you think are most visited?
9. Are there any tourism flows you left unnoticed? Are there any areas which are not part of these tourist routes and they are still left to be developed?
10. Are there any areas which are not interested for visitors and according to your opinion there is no tourism potential for them? Is there any tourism flow which doesn’t have potential at all?
11. Which tourism products are most benefited being part of these tourism flows?
12. What do you think visitors like the most? What do they don’t like?
13. Are there any tourism products visitors don’t know about so they can’t visit them?

SLOVENIA AS TOURISM DESTINATION

14. What are on your opinion strengths and weaknesses of Slovenia as a destination? Are the visitors aware of them? What is missing?
15. What is your opinion on collaboration among the actors in the tourism sector in Slovenia, regarding catering Chinese tourists? Who is on your opinion crucial to boost tourist arrivals of Chinese tourists in Slovenia?
16. Is Slovenia as a destination in your opinion exploiting all the potential regarding Chinese tourists? Is there still room for improvement?
17. Any additional thoughts you would like to share.
Appendix 7: Table Notes in English

<table>
<thead>
<tr>
<th>QUESTIONS</th>
<th>MAP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where do they come from (geographically)?</td>
<td></td>
</tr>
<tr>
<td>Entry point</td>
<td></td>
</tr>
<tr>
<td>Why they come?</td>
<td></td>
</tr>
<tr>
<td>Motives and purpose of travel</td>
<td></td>
</tr>
<tr>
<td>Where do they go next (geographically)?</td>
<td></td>
</tr>
<tr>
<td>Exit point</td>
<td></td>
</tr>
<tr>
<td>When do they come (time-wise)?</td>
<td></td>
</tr>
<tr>
<td>In the day, in the year?</td>
<td></td>
</tr>
<tr>
<td>How much time they spend here?</td>
<td></td>
</tr>
<tr>
<td>Who are the guests? Describe the segment.</td>
<td></td>
</tr>
<tr>
<td>From which region/part of China?</td>
<td></td>
</tr>
<tr>
<td>Flow theme, is there story behind the flow?</td>
<td></td>
</tr>
<tr>
<td>What do they do?</td>
<td></td>
</tr>
<tr>
<td>Development of the flow: new or well-established travel route?</td>
<td></td>
</tr>
<tr>
<td>How many of them they are (number)?</td>
<td></td>
</tr>
<tr>
<td>Behaviour name of the flow</td>
<td></td>
</tr>
<tr>
<td>System head</td>
<td></td>
</tr>
<tr>
<td>Main attraction</td>
<td></td>
</tr>
<tr>
<td>Missing products or infrastructure as a part of this flow</td>
<td></td>
</tr>
<tr>
<td>Who markets this tourism flow?</td>
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</tr>
</tbody>
</table>
Appendix 8: Interview Consent Form in Slovene

Obveščeno soglasje o sodelovanju v raziskavi

Naslov magistrske naloge: Identifikacija turističnih tokov kitajskih turistov v Sloveniji

Ime študenta/ raziskovalca: Petra Kocjan
Kontaktni e-naslov:

Mentor: prof. dr. Ljubica Knežević Cvelbar

Sem študentka Ekonomskih fakultete Univerze v Ljubljani. Raziskujem turistične toke, ki so usmerjeni k razumevanju poti kitajskih turistov v Sloveniji, z namenom zaznavanja njihovega poteka, homogenosti in ustaljenosti.

Ker je vaša poklicna dejavnost povezana s kitajskimi turistmi v Sloveniji, ste vabljeni k sodelovanju in prispevku k interpretaciji relevantnih rezultatov. Ta raziskava je izvedena samo v akademske namene. Vaše sodelovanje v raziskavi je v celoti prostovoljno in ga lahko kadarkoli prekinete brez posledic. Vaši odgovori bodo ostali zaupni in anonimni, opredeljena bo le vaša povezava s kitajskimi turistmi v Sloveniji.

V okviru te študije vam bom zastavila več vprašanj v zvezi z vašim znanjem, izkušnjami in mnenjem o obstoju in opisu turističnih tokov kitajskih turistov v Sloveniji ter Sloveniji kot turistični destinaciji. Raziskava temelji na novejšem modelu destinacijskega managementa za upravljanje in promocijo destinacije, kjer en dan predstavlja osnovno enoto, ki jo posamezni turisti uporabljajo za načrtovanje svojega potovanja. Obiskovalci destinacije se tako gibljejo v okviru določenih poti ali tokov, ki pa so neodvisni od političnih in administrativnih meja destinacije in so tako dokaz, da se posamezni turisti nanje resnično ne ozirajo. Z vašo pomočjo bi zdaj rada odkrila in zrasila te poti ter opisala obiskovalce. Pri tem je zaželeno, da udeleženci procesa opredelite čim več turističnih tokov.


Udeležba v raziskavi ne prinaša posebnih tveganj.

Soglasje udeleženca

Strinjam se z zvočnim zapisom in prepisom tega intervjuja. DA NE
Strinjam se, da bom anonimno naveden v produktih raziskave. DA NE
Jaz, ___________________________ (ime udeleženca), sem pozorno prebral in se zavedam, da je moja udeležba v tej raziskavi prostovoljna in razumem vse predhodno navedene pogoje in informacije. Tudi poskus in namen te raziskave sta mi jasna in soglašam, da bom sodeloval v današnjem intervjuju. Prejel sem kopijo podpisanega obrazca za soglasje.

Podpis udeleženca: ______________________________       Datum: ______________________________

Podpisana Petra Kocjan obljubim, da bom spoštovala postopke, opisane v tem obrazcu za soglasje.

Podpis raziskovalca: ______________________________       Datum: ______________________________

Hvala, ker ste se odločili za sodelovanje v moji raziskavi. Vaš glas je pomemben.
Appendix 9: Interview Guide in Slovene

PRIROČNIK VPRAŠANJ ZA INTERVJU: IDENTIFIKACIJA TURISTIČNIH TOKOV KITAJSKIH TURISTOV V SLOVENIJI


Opišite vse obstoječe poti kitajskih turistov v Sloveniji.

PRVI SKLOP SE NANAŠA NA ZARISANE TURISTIČNE TOKOVE

2. Zakaj prihajajo? Kakšen je njihov namen obiska, kaj jih motivira za potovanje v Slovenijo?
4. Ob katerem letnem času obiskovalci pridejo (oz. v katerem delu dneva)? Koliko časa preživijo na enem območju?
6. Kako bi čimbolj natančno opisali te turiste? Kakšen je segment obiskovalcev tega toka? Iz katere regije/mesta iz Kitajske prihajajo?
7. Katera področja niso zanimiva za turiste in po vašem mnenju za njih ni turističnega potenciala?

RAZPRAVA O ZARISANIH TURISTIČNIH TOKOVIH

8. Kateri turistični tokovi so po vašem mnenju najbolj obiskani?
9. So kateri izmed tokov ostali neopazeni? Ali obstajajo spregledana območja, ki niso del teh turističnih poti in jih je še potrebno razviti? S kakšno promocijo bi take tokove pričili obiskovalcem, da bi se večkrat odločali zanje?
10. Katera področja niso zanimiva za turiste in po vašem mnenju za njih ni turističnega potenciala?
11. Katera turistični proizvodi znotraj teh tokov so najbolj izkoriščeni?
12. Kaj menite, da je v Sloveniji najbolj vseč turistom?
13. Kaj jim ni všeč?
14. Katerih turističnih proizvodov turisti ne poznajo in jih zato ne morejo obiskati?

SLOVENIJA KOT TURISTIČNA DESTINACIJA

17. Ali je po vašem mnenju Slovenija destinacija, ki izkorišča vse možnosti v zvezi s kitajskimi turist? Katere ukrepe za izboljšanje kakovosti bi bilo potrebno vpeljati, če sploh kakšne?
18. Imate kakšne dodatne misli, ki jih želite deliti.
### Appendix 10: Table Notes in Slovene

<table>
<thead>
<tr>
<th>VPRAŠANJA</th>
<th>ZEMLJEVID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Od kod prihajajo (geografsko)? Vstopna točka</td>
<td></td>
</tr>
<tr>
<td>Zakaj pridejo? Motivacija in namen prihoda</td>
<td></td>
</tr>
<tr>
<td>Kam gredo naprej (geografsko)? Izhodna točka</td>
<td></td>
</tr>
<tr>
<td>Kdaj pridejo (časovno)? V dnevju, v letu? Koliko časa preživijo v Sloveniji?</td>
<td></td>
</tr>
<tr>
<td>Kdo so, segment turistov? Iz katerega dela Kitajske so?</td>
<td></td>
</tr>
<tr>
<td>Zgodba, ki jo tok ponazarja?</td>
<td></td>
</tr>
<tr>
<td>Kaj počnejo?</td>
<td></td>
</tr>
<tr>
<td>Stopnja razvitosti toka: nov ali stabilen, utečen?</td>
<td></td>
</tr>
<tr>
<td>Koliko oseb?</td>
<td></td>
</tr>
<tr>
<td>Vedenje toka</td>
<td></td>
</tr>
<tr>
<td>Ključne turistične atrakcije</td>
<td></td>
</tr>
<tr>
<td>Manjkajoči produži ali infrastruktura</td>
<td></td>
</tr>
<tr>
<td>Kdo oglašuje ta turistični tok? Skrb za marketing</td>
<td></td>
</tr>
</tbody>
</table>