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LEVEL OF ADOPTION OF TOURISM DEVELOPMENT IN THE REGION OF EASTERN MACEDONIA

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Abstract

In the planning process of the tourism development in the region of Eastern Macedonia, for the locations with conditions for development of alternative forms of tourism, it is necessary to take into account the current level of tourism development as a basis for further planning of the time schedule for development of the tourism industry. The extent of the past adoption of tourism in the region is reflected through the indicators for tourism development such as: tourist arrivals, tourist nights, their individual preferences for domestic and foreign tourists, as well as the accommodation capacities and the number of beds that are located in the region, which are subject to analysis in this paper. Through the analysis of these indicators for the region of the Eastern Macedonia we will perceive the degree of tourism adoption in the area, which is of particular importance because it is promoted as an area with numerous tourist resources for tourism development.

Keywords: tourism, development, tourist arrivals, tourist nights spent.

Jel Classification: Q26

INTRODUCTION

The area occupied by the region of the Eastern Macedonia is not notable with longer and significant tourist tradition and is not characterized by increased tourist movement in the past. In the period up to 1991 the area of the region of Eastern Macedonia was not touristic active, primarily due to the social and economic occasions at that time. After the independence of the Republic of Macedonia, a new period began in the tourism industry, which is characterized by the tourist movement focused on forms of mass tourism (summer-swimming and winter-sports tourism) and with the

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concentration of tourism, the tourist movement and the development of tourism in the southwestern and western region of the State, i.e. in the Ohrid-Struga and Tetovo-Gostivar tourist region.

With the change of socio-economic conditions in society, it comes to change of the perceptions and habits of the population for tourism, a new trend in travel demands, the tourist movement is dispersed throughout other areas of the country. Besides the summer and winter tourism as forms of mass tourism, tourists are increasingly practicing new, alternative forms of travel, so in this period the tourism industry forwards in the region of Eastern Macedonia. This occurrence follows the understanding of the foundations of modern tourism, which according to (Hrabovski-Tomic 2008) is *"a rich, diverse and differenced tourist offer of different forms of tourism (cultural, health, mountain, etc.) that are closer to the requirements of the guests and meet the choosey tourist needs."*

The development of tourism in the region, though it is closely associated with the emergence and acceptance of the alternative forms of tourism, it is also very closely linked with the dispersion of the season nature of tourism, which is one of the characteristics of the modern tourism. The development and the basic statistical parameters of the current tourism represent one of the important factors for evaluation of the tourism industry and that can be traced best through the indicators for numerous movements of tourists and the condition of the accommodation in the region for the past period.

1. METODOLOGY

The basic theoretical assumption in the paper is that for proper planning of the development of tourism in the region of Eastern Macedonia, which so far is in the category of *"under-developed tourist region"*, it is necessary to review the current tourism activities expressed through statistical indicators of the tourist movement and statistics indicators for the accommodation (receptive) facilities.

The methodology for data processing is particularly important for the further tourist development of the area, if they are used in the tourism planning, and in support of this is the Panov opinion, who says *"methods that are undertaken represent a very important and integral part on which depend the further proceedings in the implementation."* (Panov 2006). In the process of preparation of the paper, secondary collected data is used i.e. official data that are available in the statistical bulletins of the State Statistical Office and in the official action plans for tourism development in the area of the municipalities located in the region.

For the preparation of this paper and processing of data, several different scientific research methods for research in the area of tourism were used, such as: a statistical method for statistical presentation of data, comparative method to compare data, methods of analysis and synthesis with whose application the collected data have been processed, graphical methods for presentation of the results and so on.

2. RESULTS AND DISCUSSION

Past tourist movement in the region is reflected by two indicators, namely: indicators for the realized tourist arrivals (visits) by domestic and foreign tourists and indicators for the realized nights spent by domestic and foreign tourists. These indicators are very important in the analysis of tourist movement, but special attention should be paid to the second indicator (realized nights) because through the analysis of the nights, we are getting aware of the average length of tourist stay, which further indicates the tourism development and the attractiveness of the area for which the results relate. It should be taken into account that the number of tourists and visitors in the region is larger than the stated in the statistical surveys chart, because the travelers and tourists who are not staying in registered accommodation facility are not included in the statistical data, and such difference in methodology during the collecting of data is pointed out by (Budinoski 2010) who says "*since the tourists are registered in places or facilities in which they temporarily reside, if there is a change of place it leads to duplication of data, or if the tourists are not registered in the accommodation facility, then they are not recorded at all...*".

The overview of the current tourist development of the region of Eastern Macedonia will start with an overview of the number of tourists who have visited this region. The overview refers to the ten-year period from 2003 to 2012 and in it, besides the total number of tourist arrivals (*visits*), separately are presented the number of foreign arrivals and the number of arrivals of domestic tourists. The data are presented in the following table 1 (Statistical Review: Transport, tourism and other services, 2013).

Table 1. Tourist arrivals in the region of Eastern Macedonia for the period 2003–2012

year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	
Republic of Macedonia	total tourists	483 153	465 015	509 706	499 473	536 212	605 320	587 770	586 241	647 568	663 633
	domestic	325 459	299 709	312 490	297 116	306 132	350 363	328 566	324 545	320 097	312 274
	foreign	157 692	165 306	197 216	202 357	230 080	254 957	259 204	261 696	327 471	351 359
region of Eastern Macedonia	total tourists	8 602	9 865	9 377	12 069	10 813	13 739	12 680	13 054	13 615	18 865
	domestic	6 571	7 520	7 061	8 959	7 021	9 230	8 135	8 463	7 948	12 275
	foreign	2 031	2 345	2 316	3 110	3 792	4 509	4 545	4 591	5 667	6 590

In the data of the table that are obtained from the State Statistical Office one can notice upward changes in terms of arrival i.e. the number of tourists who visited the region of Eastern Macedonia, so at the beginning of the analyzed period in 2003 the region was visited by a total of 8.602 tourists, which compared with the total number of tourists visiting the Republic of Macedonia (483.153 tourists) in the same year represents only 1.7%. The number of tourists, expressed in absolute numbers, who are visiting the region in the next ten-year period is continuously increasing so at the end of the analyzed period, in 2012, the region was visited by a total of 18.865 visitors, representing 2.8% of the total number of tourists who visited the Republic of Macedonia (663.633 tourists) in the same year.

This shows that the participation of the number of tourists in the region of Eastern Macedonia compared to the total number of tourists in the country for ten-year period has increased from 1.7% to 2.8%. Even more significant is the fact that in the region the number of tourists from 8.602 in 2003 increased to 18.865 tourists in 2012, which is an increasing of 10.263 tourists expressed in absolute numbers or expressed in percentage it shows increasing by 119.3% over the period of ten years. This clearly indicates that the region gains importance as a tourist destination which can be seen though the increased number of tourists, especially in the last five years, since the number of tourists who visit this region during one year amounts to over 13.000 tourists.

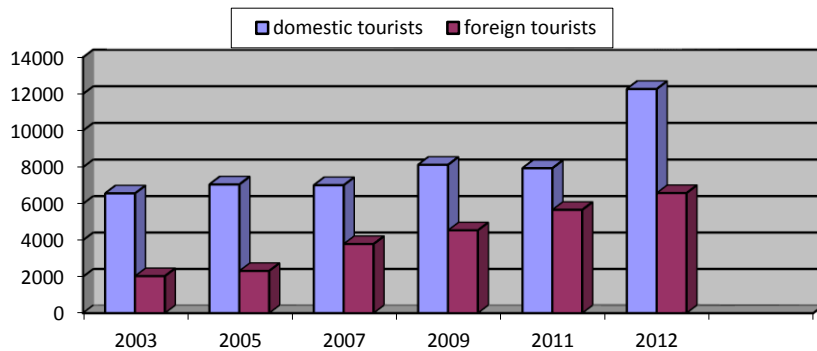


Figure 1. Tourist arrivals in the region of Eastern Macedonia (domestic and foreign tourists) for the period 2003–2012

The data in the table also show the evident difference that occurs in the number and the ratio between domestic and foreign tourists who have visited the region for the same analyzed period from 2003 to 2012. In 2003 the region was visited by 6.571 domestic tourists, representing 76% of the total number of tourists who visited the region in that year, while the remaining 24% or 2.031 were foreign tourists. While in the last year of the analyzed period, 2012, there is a remarkable change in favour of foreign tourists, so that of the total number of tourists who visited the region, 12.275 tourists or 65% were domestic tourists, while 6.590 or 35% of tourists were foreigners.

These data indicate the increased participation of foreign tourists who visit the region i.e. that their participation in the ten-year period in the total number of tourists in the region have increased from 24% to 35%. If we look at the absolute numbers of domestic and foreign tourists then it can be noticed that the number of domestic tourists who visited the region in 2012 increased by 5.740 tourists compared to 2003, i.e. there is an increase of 86.8%, while the number of foreign tourists who visited the region in 2012 was increased by 4.559 tourists compared to 2003, which shows a very high growth of 224%. This growth in the number of foreign tourists is particularly evident in the period from 2008 to 2012, where each year are recorded over 4.500 foreign visitors with continuous progressive dynamics.

This information is particularly important if we take into account the importance and impact that the foreign tourists have over the stimulation and improval of the local economy. The participation of foreign tourists who visited the region in the total number of foreign tourists visiting the Republic of Macedonia is also increased during the analyzed period. In 2003 the region was visited by 2.031 foreign tourists, representing 1.28% of the foreign tourists visiting the Republic of Macedonia that year. While in 2012

the number of foreign tourists who visited the region is 6.590, which compared the number of foreign tourists visiting Macedonia that year is participation of 1.87%. Besides the number of tourists who have visited the region, the second indicator for the current development of the tourism is the indicator of the number of realized nights by tourists. The review refers to the ten-year period from 2003 to 2012 and in it, except the total number of realized nights by tourists, the number of nights spent by foreign and the number of nights spent by domestic tourists are separately shown. The data are presented in the following table 2 (Statistical Review: Transport, tourism and other services, 2013).

Table 2. Tourist nights spent in the region of Eastern Macedonia for the period 2003–2012

year	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	
Republic of Macedonia	total tourists	2 006 867	1 865 434	1 970 041	1 917 395	2 019 712	2 235 520	2 101 606	2 020 217	2 173 034	2 151 692
	domestic	1 660 667	1 504 845	1 527 053	1 474 550	1 501 624	1 648 073	1 517 810	1 461 185	1 417 868	1 339 946
	foreign	346 200	360 589	442 988	442 845	518 088	587 447	583 796	559 032	755 166	811 746
region of Eastern Macedonia	total tourists	22 171	26 406	19 909	28 989	21 694	28 449	27 509	25 687	28 852	37 358
	domestic	17 070	19 362	14 283	21 301	12 490	18 137	15 742	14 504	15 614	20 930
	foreign	5 101	7 044	5 626	7 688	9 204	10 312	11 767	11 183	13 238	16 428

From the data on nights spent during the ten-year analyzed period we can see the moving dynamics of the tourism development in the region and the average time of tourists stay, from which it can be concluded if the region represents an interesting destination that offers attractive content to motivate tourists to stay longer.

Notable differences are ascending from the beginning to the end of the analyzed period, namely in the first analyzed year 2003 in the region there were realized total of 22.171 nights spent i.e. there were realized 1.1% of the total number of spent nights in the Republic of Macedonia for that year. Meanwhile, in the last analyzed year 2012 in the region there were realized total of 37.358 nights, representing 1.7% of the total number of nights realized in the country. These data suggest an increase in the absolute number of realized overnights per year in the region of 15.187 spent nights in 2012 compared to 2003, which represents an increase of 68.5%. Also there was an increase in the participation of realized overnights in the region, in the total number of nights spent in the Republic of Macedonia from 1.1% participation in 2003 to 1.7% participation in 2012.

Other important information that is obtained from the analysis of statistical data of Table 2, which profiles the region as a tourist destination, is the ratio and the number of realized overnights by foreign and domestic tourists. These data shows that the region in 2003 generated 17.070 overnight stays of domestic tourists which is 77% of the total number of realized overnights in the region, while foreign tourists realized only 23% of total overnights or only 5.101 overnights in the same year. While in the last analyzed year of 2012, the total number of realized overnights in the region is 37.358 overnight stays, out of which the domestic tourists realized 20.930 nights which is 56% of the total number of nights spent in the region, while the foreign tourists in the same year achieved 16.428 nights representing 44% the total number of realized overnights in the region.

The analyzed data shows that the realized overnight stays realized by domestic tourists in 2012 increased to 3.860 compared to the overnight stays in 2003, which is an

increase of 22.6%. While the increase in overnight stays of foreign tourists in 2012 compared to 2003 is 11.327 nights or a percentage it is a major increase of 222%.

In the analysis of the total number of realized overnights in the region is evident that in the last analysis in 2012 it comes to the percentage increase in nights spent by foreign visitors as opposed to nights spent by domestic visitors, compared to the first analyzed year 2003. In the first year of the analyzed period the participation of realized spent nights by the foreign guests in the total number of realized overnights is low 23%, while in the final year of the analyzed period this participation is increased to 44%.

From the data in Table 2 and their analysis, another figure that represents the participation of nights spent by foreign tourists in the region in the number the total nights spent by foreign tourists in the country can be obtained. At the beginning of the analyzed period in 2003, the number of overnight stays realized by foreign tourists in the region participates with 1.47% in the total nights spent by foreign tourists in the Republic of Macedonia. At the end of the planning period in 2012, the number of realized overnights by foreign tourists in the region participates with 2.02% in the number of total nights spent by foreign tourists in the Republic of Macedonia. The analysis shows that there is a slight increase in the percentage participation from 1.47% to 2.02%, which still is not enough and points to the fact that the region of Eastern Macedonia is not yet sufficiently attractive or famous tourist destination for foreign tourists compared to the other tourist destinations in the country.

Dynamics of ranging the number of tourists who visit the region and the number of nights spent in individual years in the ten-year analyzed period is presented in the following graph.

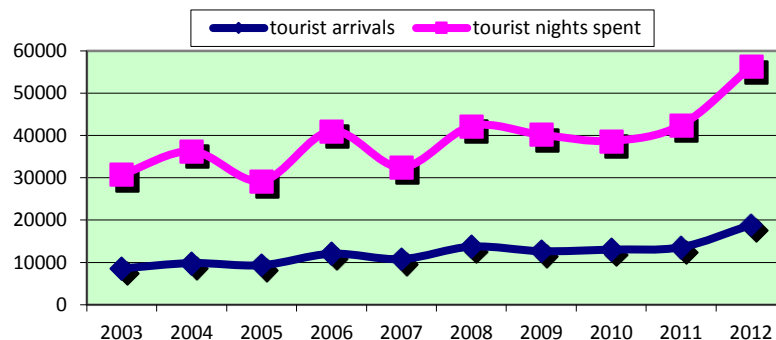


Figure 2. Dynamics of tourists arrival and tourist nights spent in the region, for the period 2003–2012

Another important parameter that can be obtained by comparing of the data in the previous two tables that is important in order to present the current tourism development of the region is the average stay of tourists in the region. It is actually the ratio between the number of nights spent and the number of tourists arrivals in the region.

In the first year of the analyzed period every tourist in the region of Eastern Macedonia stayed for an average of 2.57 days, which is less than the average stay of tourists throughout the Republic of Macedonia for the same year, which was 4.15 days. The average stay in the last analyzed year of 2012 shows a decrease in the region and was 2.05 days, which is also less than the state average for that year which was 3.24 days.

The situation is similar with the average length of stay of domestic and foreign tourists, so that the domestic tourists in 2003 averagely stayed in the region for 2.59 days, while in 2012 their average stay in the region was 1.7 days. While the condition of the average length of stay of foreign tourists is such that in 2003 they stayed for an average of 2.51 day, while in 2012 the average length of their stay was 2.49 days.

These data suggest that the stay of tourists in the region is at very low level and below the country's average, which is indicator of the low level of tourism development in the region thus far.

The next information that is also important to measure the current development of tourism in the region of Eastern Macedonia are the accommodation facilities expressed by number of rooms and number of beds, and these data are presented in the following table 3 (Statistical Review: Transport, tourism and other services, 2013).

Table 3. Accommodation facilities in the region of Eastern Macedonia for the period 2008–2012

		year	2008	2009	2010	2011	2012
Republic of Macedonia	number of rooms		25 952	26 390	26 189	26 448	26 877
	number of beds		69 097	69 561	69 102	69 737	70 287
region of Eastern Macedonia	number of rooms		588	598	533	544	599
	number of beds		1 729	1 718	1 591	1 606	1 721

According to the State Statistical Office of the Republic of Macedonia in terms of accommodation in the region, referring to the five-year analysis period from 2008 to 2012, the following situation can be seen: in 2008 in the region there were a total of 588 rooms, which represents 2.26% of the total number of rooms in the country that year, while in 2012 the number of rooms in the region is 599 rooms, which is an increase compared to 2008 for 11 rooms or insignificant 1.8%, while in the same year the number of rooms in the region participates with only 2.22% in the total number of rooms in the country, which again is a decrease compared to the participation in 2008.

The situation is also unfavorable regarding the number of beds, so in 2008 the region of Eastern Macedonia has 1.729 beds, which is only 2.5% of the total number of beds in the country that year, while in 2012 there was a reduction in the number of beds in relation to the first year of the analyzed period for 8 beds and the same year the total number of beds is 1.721, which in percentage participation in the total number of beds in the country is only 2.44%.

The dynamics of the situation with the accommodation facilities in region of Eastern Macedonia in the period from 2008 to 2012 is presented in the following graph.

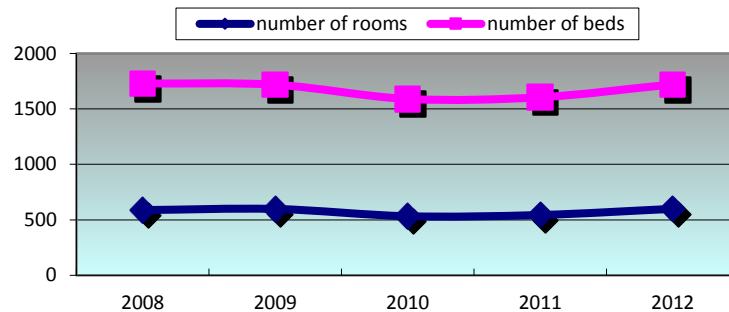


Figure 2. Dynamics of the number of accommodation facilities in the region for the period 2008–2012

These data suggest to the insignificant participation of the accommodation facilities from the region in the total number of accommodation facilities in the country, as well as the stagnation and even decline in the number of them during the analyzed five-year period, which again confirms the weak and insignificant tourism development and the pace of development in the analyzed region.

By comparing of the results of analyzed data from the previous two tables (*table 2 and table 3*), we can conclude that the number of realized overnight stays in the region in 2008 participated with 1.75% in the total number of realized overnights in the country, while in the same year the number of accommodation beds in the region participates with 2.5% in the total number of accommodation beds in the country. In 2012 the number of overnight stays realized in the region participates with 1.7% in the total number of realized overnights in the country, while in the same year the number of accommodation beds in the region participates with 2.44% of the total number of accommodation beds in the country.

These data indicate the insufficient usage of the accommodation facilities in the region i.e. the percentage participation of the accommodation facilities in the region in relation to the country and during the whole analyzed period is higher compared with the participation of realized overnights in the region in relation to the country.

CONCLUSION

Region which is analyzed in this paper have not been characterized by significant tourist development, but it is increasingly emerged as an interesting tourist destination. The results obtained from this study should contribute positively to understanding of the current level of tourism development in the region of Eastern Macedonia. This should be used as a basis for planning of the future tourism development.

Of the analyzed data can be concluded that the current level of tourism development in the area is rather low which is reflected by the small or minimal involvement of the tourist movement in the region in terms of total tourist movement in the country. Tourist movement is presented by the tourist arrival data and data realized tourist overnight stays.

According to these data can be seen that tourist arrivals in the region participate in minor 2.8%, while the participation of foreign tourists that have visited the region in terms of total number of foreign tourists in the state is 1.87%. These data clearly indicate a very low level of tourism development in the region. Similar situation is with nights

spent, thus nights spent which are realized in the region participating with only 1.7% of the total nights spent in the country.

However during the analysis was noted continuously increasing tourist movement in the region over the ten-year period analyzed, which was noted increasing number of tourists who visit the region from 8600 in 2003, to over 18 800 in the last analyzed period. This data clearly indicates of the importance that the region receives for the development of tourism especially in the last five years, which should be taken into consideration in the planning of the development of tourism at the regional level.

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