



Service sector in terms of changing environment

## Tourism in Macedonia in changing environment

Naume Marinovski<sup>a</sup>, Saso Korunovski<sup>a\*</sup>

*<sup>a</sup>Faculty of Tourism and Hospitality – Ohrid, University “St. Kliment Ohridski” – Bitola, Kej Marshal Tito 95, Ohrid 6000, Republic of Macedonia*

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### Abstract

Contemporary conditions in the tourist industry began to manifest a series of problems in recent decades. As never before numerous events have occurred that not only changed the affinities and tastes of the tourist demand, but also led the tourism offer to focus on new strategies and aspects of operation. The rules of the game have changed to the core with the emergence of more frequent terrorist attacks, economic volatility, weather disasters, new conflict hot spots in the world and so on. Tourism as a specific and complex industry has become too sensitive to such changes. Unlike these and similar external factors that in general have negative impacts on tourism, there have also been changes in the behavior and demands of the tourists themselves. Visiting new and unknown tourist destinations in recent years is becoming a major motivational characteristic of the tourists' decision to engage in the tourist flows. Inevitably is the need of the tourist destinations to adapt to this changing environment. Republic of Macedonia still represents an insufficiently explored destination in tourism terms. It can be concluded that the state of the tourism industry is on a low developed level. The changes that have occurred did not spare even this destination. There exist a number of new methodologies for successful adapting to this situation and achieving of competitive advantage in order to survive on the tourism market. The cluster approach in this sense refers to the use of new methodology. It used for the first time in the strategic formulations. Experience shows that the cluster model can be applied to various forms of tourist activities. Based upon the defined objectives, frameworks and guidelines, several clusters can be differentiated with the use of the criteria of priority. In Macedonia the cluster approach is applied to the rural, cultural, mountain, lake and wine tourism. However, in methodological terms this is an open segment of research that can also be used on other possible forms. Using these global experiences will have a contribution for Macedonia to become one of the countries in which the applicability of this methodology is accepted by all stakeholders. The results show remarkable gains that can be recommended to other spatial units in the country and abroad.

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\* Naume Marinovski, PhD. Tel.: +389 70 237 817; fax:  
E-mail address: [naumemarinovski@yahoo.com](mailto:naumemarinovski@yahoo.com).

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## 1. Introduction

Republic of Macedonia in its area and population is one of the smallest states in Europe. Its area stretches 25 713 km<sup>2</sup>. There are about two million inhabitants. Although it is a relatively small country, it is characterized by the presence of numerous tourist values. In this area, notably is the presence of natural and anthropogenic attractive values.

The potentials that it possessed as well as its tourist-geographical position represent a basic assumption in the determination of the state to put the tourism industry in priority activities. Tourism development should be aimed at improving not only the economy but also towards tourism and the economy as a whole. Balanced development, underdeveloped spatial entities, vitalization and promotion of attractive values, protection and improvement of the environment in areas of national interest, establishing a cultural attitude towards nature, natural and cultural heritage, raising the educational level of visitors and health-recreational benefits are well-known tourist functions.

The research data in the sense of tourism operations, tourism offer and visits by domestic tourists, but also by foreign guests suggest a great disadvantage of the current state of tourism in Macedonia. The meager achievements in the field of tourism revenues can not be satisfactorily placed in comparative terms with the competing destinations in the region as well as worldwide.

We believe that improving the competitive position of Macedonia and overcoming the existing problems can be achieved through the cluster approach in the strategic plans of the tourism policy makers, as with all involved stakeholders in the region.

## 2. Tourism performance

Differentiation of the statistical regions of the Republic of Macedonia represents one of the changing circumstances in which tourism operates. Even it can be said that it is dominant because it represents a policy of balanced regional development.

Tourism in these changing circumstances has a leading role and it allows utilization of the resources at the highest level of sustainability. The commitments for sustainability are one of the foundations for development in this regard. The performances should be accepted as development indicators in the Republic of Macedonia based on the diversity and abundance of resources and the potential tourism offer.

In 2009, Macedonia has welcome and hosted an overall number of 587 770 tourists, which represents an overall number of 2 101 606 overnights. Even though tourism has not still recovered its attendance level of 2000 (632 523 tourists), it has been in constant progression since the conflicts of 2001, which have had a serious negative impact on tourism performance.

Despite a loss of 2.9% since 2008, considered as a good tourism year (605 320 registered tourists and 2 235 520 overnights), tourism attendance in 2009 remains within the scope of tourism general progression since 2002. The table 1 overleaf shows the tourism attendance progress from 2000 to 2009, in terms of number of tourist accommodation registrations and number of overnights.

Following the regional division of Macedonia into 8 statistical regions, it is possible to draw up a brief overview of the territorial tourism breakdown.

The Table 1 below shows the evolution of tourist arrivals in each of the 8 regions in Macedonia between 2005 and 2009. It reveals a major tourism attendance of the Southwest region (257 480 arrivals in 2009), probably thanks to the tourist attractiveness of the UNESCO City of Ohrid. This region represents twice the tourism attendance of the capital-region of Skopje (131 268 arrivals). The

Southeastern region on the Greek border and the Pelagonian region starting from the lake of Prespa respectively reach the 3rd and 4th position of tourist-attended regions in Macedonia (between 50 000 and 100 000 tourist arrivals in 2009).

Table 1. Tourists' arrivals by statistical regions

Regions/years	2005	2006	2007	2008	2009
<b>TOTAL</b>					
Vardar	7 564	8 173	8 419	7 799	9 448
Eastern	9 377	12 069	10 813	13 739	12 680
South-west	236 434	233 218	255 257	276 669	257 480
South-east	61 851	58 577	66 043	84 031	90 998
Pelagonija	58 553	51 970	51 715	63 325	50 740
Polog	20 555	21 890	17 188	19 153	31 596
North-east	3 672	2 433	3 657	3 395	3 560
Skopje	111 700	111 143	123 120	138 209	131 268
<b>TOTAL</b>	<b>509 706</b>	<b>499 473</b>	<b>536212</b>	<b>605 320</b>	<b>587 770</b>

### 2.1. Macedonian resources' diversity and richness

Diversity in Macedonia is the main word to qualify its tangible and intangible heritage. The major stake of tourism development in Macedonia is now to find the appropriate sustainable marketing offers and enhancement tools to reveal them as key tourist resources. Macedonia first determines itself by the variety and number of cultural heritage sites, directly inserted in its rural, mountain and urban landscapes. On its small geographical area of 25 713 km<sup>2</sup>, are presently registered:

- 2 567 monuments of culture from the Neolithic to the Ottoman historic periods are presently registered;
- 5160 archeological sites (while 108 are protected);
- 4681 memorial monuments;
- 1286 urban, rural and commercial architecture;
- 29 urban and rural complexes of segments;
- 1156 churches and monasteries;
- 61 medieval, fortresses, bridges, towers;
- 112 mosques;
- 71 other objects from the 15<sup>th</sup> till the 19<sup>th</sup> century;
- 22850 – icons.

The visibility, accessibility, and knowledge by the Macedonians themselves of these cultural heritage resources and sites are generally little developed, and above all contrasted. Whereas the UNESCO-registered Ancient Town and Lake of Ohrid has highlighted some now popular heritage facilities, and apart from major Macedonian archaeological sites, many other heritage spots of major historic value remain almost unknown, due to their maintenance conditions, geographic location, or/and poor accessibility due to lack of transport connections.

Macedonia's diversity of tourist resources also lies in its natural heritage, enriched by diverse reliefs and climate. The country shelters more than 50 lakes of variable sizes, from the 3 southern cross-border lakes of Ohrid, Prespa and Dojran to small glacial lakes located on mountains peaks between 1500 and

2300 meters high. It has 16 mountains which are higher than 2,000 m, the highest Macedonian peak being Mount Golem Korab (2764 meters) and also abounds of rivers, canyons, gorges, waterfalls and natural caves.

Macedonia's tourist resources are also present in its intangible traditions and human heritage. Macedonian rich gastronomy and wine making traditions, traditional music, cultural feasts and celebrations, all fed by different historic and cultural influences, form the multicultural identity of Macedonia, and represent an authentic tourist resource in themselves. Those natural and intangible resources are however very under-used, not well promoted and badly-known, even at national level. A lack of specialization, resources interpretation and marketing offer seem to restrict Macedonian resources to tourist guides contents with very few easy possibilities to assess and enjoy them on site.

### 3. Assessment of the current situation

The circumstances of variability in the Republic of Macedonia imply a valorization relation. This valorization relation we could summarize by presenting a SWOT analysis through which we presented an evaluation on the current conditions.

The comprehensive qualitative and quantitative appraisal of the current situation of Macedonia as a whole destination can be recapitulated through the following SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis.

#### **Strengths:**

- Macedonia is a new country in tourism development with well-preserved cultural and natural heritage;
- More particularly Macedonia boasts a very old history and a prestigious reference (Alexander the Great) and is, with Ohrid, one of the major sites of the Mediterranean World;
- Macedonia is at the crossroads of Roman, Slavic, Greek and Ottoman worlds, offering a very dense cultural diversity, which is a strong asset;
- Its mountain eco-tourism heritage and resources are very interesting and very well preserved;
- The wine tourism "niche" is also an important asset, very trendy today;
- More generally, the quality of agricultural produces and culinary and gastronomic heritage and know how;
- A privileged situation on the axis North Europe – Athens – Istanbul.

#### **Weaknesses:**

- Tourism facilities and infrastructures are mostly obsolete (except for Skopje where new hotels have been built) and of insufficient quality regarding actual norms and standards and the offer in the neighboring countries;
- The image of a country "in war", although not true, can disappear over a longer period of time, in the minds of poorly informed European markets;
- The Government does not seem to have as yet secured adequate means for implementation of indispensable facilities and infrastructures (among other, tourism signage) and in order to set up the basis for tourism development and attract investor and tour operators;
- The means allocated to tourism observation and promotion and to heritage protection are still insufficient;
- The breakdown of competences and the coordination between the central government and the local authorities are still far from being appropriate;
- The tourism welcoming facilities and tourism information offices have too low objectives and too limited means;
- The cooperation between the public bodies and the private operators is sporadic but not yet sufficient;

- The image of Macedonia as a country is still fuzzy, and its belonging to the Balkans, a better identified region, is not known enough;
- Therefore Macedonia does not meet the conditions to be already now integrated in the offerings of European tourism operators.

***Opportunities:***

- Macedonia belongs to the « family » of former Yugoslavia countries among which the already developed tourism exchanges have been maintained;
- Conflicts are over and tensions with certain neighboring countries are disappearing;
- Macedonia is part of the Balkans which appear for the European markets as both a new and preserved destination to discover (heritage, nature & culture, etc);
- Interest of the Slavic markets for one of their southernmost countries;
- Programmed integration in the EU;
- Growing worldwide interest in the Mediterranean countries;
- Possibility to develop new tourism infrastructures well-conceived within the framework of sustainable tourism development.

***Threats:***

- Global competition of neighbouring countries which offer easily accessible Mediterranean littoral for regional markets, including the national market itself: Greece, Turkey, Croatia, Montenegro, Albania;
- Strong competition on certain product segments: religious heritage (Bulgaria), wine tourism (Slovenia, Bulgaria), national parks and natural environment (Bosnia, Montenegro);
- A too inert setting up of a professional tourism organization and of development of up to date infrastructures and facilities;
- Difficulties to be a visible destination in Europe, against Greek competition, the name of Macedonia and the issue of the historical reference to Alexander the Great.

#### **4. Thematic and territorial approach**

Based on the research we could define the spatial and thematic approaches in the above mentioned conditions of variability. So we came to the cluster system which represents a modern research component of Macedonian tourism.

The state of the Republic of Macedonia on the regional and world tourism market is on an unsatisfactory level of development. We suggest using the strategy of cluster approach of tourism development in separate regions in Macedonia. The performance of the market can be facilitated by using an appropriate marketing strategy oriented to the given territorial units considered as unique clusters, taking into account the spatial and thematic approach as the main direction of development:

- 5 thematic clusters according to the prior study of targeted markets needs and Macedonia's comparative assets;
- 3 major geographic spots in each cluster, as potential implementation spots of thematic cluster development;
- We can examine 1 pilot project per cluster, among the 3 beforehand identified spots. This pilot-project spot will be the place of tourist product creation, according to its corresponding thematic cluster. The experience of such pilot approach would then be exported to the 2 other spots selected within the same cluster and/or replicated in other regions of the country offering the equivalent potentials.

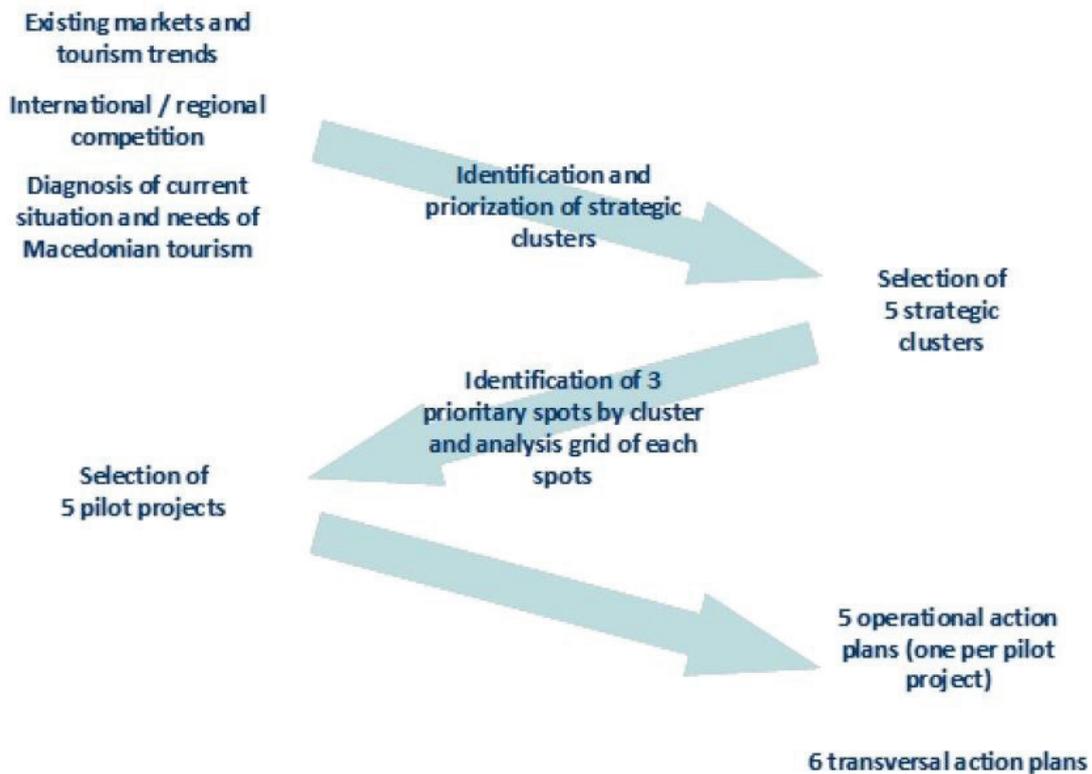


Fig. 1. Identification of priority clusters

## 5. Pilot projects identification and formulation

The selected pilot projects for implementing the strategic marketing tendencies in a cluster sense would be the following:

Table 2. Thematic clusters and pilot application

Thematic Cluster	Pilot Application
Cluster 1 – Lake tourism	Dojran
Cluster 2 – Wine tourism	Tikves
Cluster 3 – Cultural tourism	Ohrid
Cluster 4 – Rural tourism	Mavrovo - Reka
Cluster 5 – Mountain and nature tourism	Popova Sapka – Sar Mountain

The medium range and long-term objective of this pilot territorial approach is to spread geographically the tourist products which will have been built-up and tested in pilot-project spots to the other spots

which have been identified for each cluster. The chart below shows the expected mid and long term territorial spreading or extension of the adopted territorial strategy.

## 6. Overview of tourism types in Macedonia

Regarding the diversity and richness of its cultural heritage and natural resources, Macedonia has nowadays a wide range of varied potentials for offering different forms of tourism, which can very well combine in order to propose the substance for attractive tourist products:

- Cultural tourism
- Lake tourism
- Mountain tourism
- Rural and ecotourism
- City tourism
- Spa tourism
- Wine tourism

These activities are all the combination between tangible resources (culture, nature...) and the development of related tourism activities: cultural events and manifestations, rivers activities, fishing and hunting, winter sports activities, summer mountain activities...

The potentials for the development of those different forms of tourism and their related activities are spread through the overall Macedonian land. Following the regional division of Macedonia into 8 regions and their main localities, the following overview of these tourism forms potentials has been established:

REGION	LOCALITY	FORMS OF TOURISM AND RELATED ACTIVITIES
<b>Polog Region</b>	Popova Shapka	Mountain tourism activities, Eco-tourism, Manifestations, Alternative tourism forms,
	Mavrovo	Mountain tourism activities, River tourism activities, Fishing, Hunting, Ecotourism, Rural tourism, Manifestations, Cultural tourism activities, Caving/Speleological activities, Alternative tourism forms,
	Reka	Rural tourism, Cultural tourism activities, Mountain tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Manifestations,
<b>Skopje Region</b>	Skopje	City tourism, Manifestations, Cultural tourism activities, Transit tourism
	Matka	Eco-tourism, Fishing, River tourism activities, Lake tourism, Cultural tourism activities, Manifestations, Caving/Speleological activities, Alternative tourism forms,
	Katlanovska Banja	Spa centres, transit tourism,
<b>North-East Region</b>	Kumanovo	City tourism, Manifestations, Cultural tourism activities, Transit tourism, Spa centres
	Kokino	Cultural tourism activities
<b>East Region</b>	Kocani	Spa centres, Mountain tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Alternative tourism forms,
<b>South - East Region</b>	Dojran and Dojran Lake	Lake tourism, Eco-tourism, Fishing, Alternative tourism forms-health tourism
<b>Vardar Region</b>	Demir Kapija	Wine tourism, Rural tourism, Cultural tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Manifestations, Transit tourism, Caving/Speleological activities, Alternative tourism forms,
	Kavadarci	Wine tourism, Rural tourism, Cultural tourism activities,
<b>Pelagonija Region</b>	Pelister	Mountain tourism activities, Hunting, Eco-tourism, Manifestations, Alternative tourism forms
	Mariovo	River tourism activities, Fishing, Hunting, Eco-tourism, Rural tourism, Cultural tourism activities, Alternative tourism forms
	Galicica	Mountain tourism activities, Eco-tourism, Cultural tourism activities, Alternative tourism forms
<b>South - West Region</b>	Ohrid	Lake tourism, Eco-tourism, City tourism, Manifestations, Cultural tourism activities, Wine tourism, Alternative tourism forms,
	St. Naum	Lake tourism, Cultural tourism activities, Fishing, Eco-tourism
	Debar	Spa centres, Mountain tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Rural tourism, Lake tourism

In the interest of this paper in table 3 are presented only those sites within the eight regions in which there exist the most potential opportunities for development of selective types of tourism.

In the **Polog Region** despite Popova Sapka, Mavrovo and Reka as localities with the most developed tourist offer and with the best infrastructural and superstructural development are also given the localities Tetovo, Lesok, Gostivar and Bistra. Excellent opportunities for diversified tourism activities are represented by the following possible forms of tourism: Mountain tourism activities, River tourism activities, Fishing, Hunting, Ecotourism, Rural tourism, Manifestations, Cultural tourism activities, Caving/Speleological activities, Alternative tourism forms, etc. Important for mentioning are the urban centers of Tetovo and Gostivar in the region that provide numerous receptive facilities for tourists stay.

In the **Skopje Region** we have singled out Matka and Katlanovska Banja as the most convenient localities for development of selective tourism forms. In this sense there can be distinguished the following forms: Eco-tourism, Fishing, River tourism activities, Lake tourism, Cultural tourism activities, Manifestations, Caving/Speleological activities, Alternative tourism forms, Spa centres, transit tourism. Other sites are Vodno, Skopska Crna Gora and Jasen reseve. Of course there must be mentioned the convenience of the region in terms of connectivity and easy accessibility for tourists. Receptive capabilities are complemented by the fact that it is the capital of Republic of Macedonia.

In the **North-East Region** there can be distinguished the following forms of tourism: City tourism, Manifestations, Cultural tourism activities, Transit tourism, Spa centres and others. They are present in the localities Kumanovo and Kokino as more important. Other sites are Nagorichane Matejce, Lipkovo and Kratovo

In the **East Region** the most advantageous opportunities for successful development of selective forms of tourism exist in Kocani. There are prevalent: Spa centres, Mountain tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Alternative tourism forms and others. Other important sites are: Berovo, Stip, Delcevo, Lesnovo and Vinica.

In the **Southeast Region** the most beneficial opportunities for developing of tourism forms exist in Dojran and Dojran Lake: Lake tourism, Eco-tourism, Fishing, Alternative tourism forms-health tourism, while other sites that complement these activities are: Gevgelija, Strumica, Vodoča, Plachkovica, Negorci and Valandovo.

In the **Vardar Region** as tourism forms in Demir Kapija and Kavadarci can be mentioned: Wine tourism, Rural tourism, Cultural tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Manifestations, Transit tourism, Caving/Speleological activities, Alternative tourism forms. Other important sites are: Negotino, Veles, Stobi, Babuna, Lake Mladost and Tikvesh Lake.

In **Pelagonija Region** most attractive localities for visiting by tourists are: Pelister, Galicica and Mariovo which exhibit excellent selective benefits of tourism aspect. Forms of tourism that can be developed in these are: Mountain tourism activities, Hunting, Eco-tourism, Manifestations, Alternative tourism forms, River tourism activities, Fishing, Cultural tourism activities and so on. Other localities are: Prilep, Bitola, Krusevo Slepche, Golem Grad, Oteshevo, Pretor, Brajcino and Malovishta.

One of the most important regions of Macedonia is the **South-West Region**. More important centres are: Ohrid, St. Naum and Debar. Other important to mention are: Struga, Kicevo, Peshna, Radozda, Peshtani, Trepjca, Vevcani. Forms of tourism in this region are: Lake tourism, Eco-tourism, City tourism, Manifestations, Cultural tourism activities, Wine tourism, Alternative tourism forms, Spa centres, Mountain tourism activities, River tourism activities, Fishing, Hunting, Eco-tourism, Rural tourism and other.

It can be concluded that throughout the territory of the republic there exist excellent opportunities for developing complementary products and services that enables diversity of the tourist offer.

## **7. Definition and differentiation of tourism types and action plans**

The cluster approach that summarizes the change of the conditions in the Republic of Macedonia has given us the right to define and differentiate selective types of tourism. They are placed in the context of the action plans required. With this particular development priorities and the most suitable opportunities for the realization of the strategic interests of Macedonian tourism are defined.

Based on the conducted research there can be differentiated and defined the tourism products and be suggested specific action plans. They are given in the following table:

Table 4. Overview of tourism types and implementation activities

Cluster / Type of tourism	Activities			Implementation		
	Targeted geographic markets	Targeted market segments	Offer	Governance	Marketing	Communication /Promotion
<b>Lake tourism</b>	- domestic and regional	- families, seniors, campers	- entertainment, swimming, traditional customs, spas and health tourism, signalization, accommodation	- cross-border cooperation workshops, training	- Tours, info center, guides	- promotion, website, promotional videos, brochures, posters, national media, television, cultural and sporting events
<b>Wine tourism</b>	- domestic, regional, western Europeans worldwide market	-wine lovers	- signalization, accommodation, interior, festivals, cultural events, shops, wine tasting, guides, restaurants, museum	- Association of Macedonian wines, workshops, cross-border cooperation	- Tourist information office stations, tours, web tools, online sales	- web promotion, web portals, brochures, posters, shops, journalists, authors and guides, newsletters
<b>Cultural tourism</b>	- local, domestic, regional, European, worldwide market	- couples, seniors	- signalization, museum, accessibility, seasonality, lighting, parking lots, shops, cultural artists, info center, guides	- protection, monitoring, workshops, tourist association, training, evaluation, intercultural cooperation of cities	- tours, Tourism Office	- website, Tourist Office, online offer, brochures, journalists, guides
<b>Rural tourism</b>	- domestic, regional, western Europeans	- single persons or couples without children, people between 20 and 45 years old, small size groups	- accommodation, wooden houses, complexes, tourist apartments, village houses, campings, recreational activities, maps and charting, walkways, water activities, extreme sports, beaches, traditions, eco-museum, workshops, local production	- Local and international cooperation, multilateral and bilateral programs, rural development, handicraft	- “Tourist office”, rural tourism and educational tours	- media promotion, website, promotional video, internet tours, brochures, network promotion, journalists, guides, fairs
<b>Mountain and nature tourism</b>	- domestic, regional	- medium and well-off social categories, families, couples, young adults from 18 to 35 years old, groups	- facilities, information services, animation, systematization, info center, restaurants, sports shops, souvenirs, a center of culture, connectivity, cable car, signalization, ski trails, riding, parasailing, paragliding, bird observing	- Regional cooperation, protected areas, natural tourist trails, cross-border cooperation, Tourist Office, National Association for mountain tourism	- winter and summer tourism products, private apartments, sports package tours, summer camps, websites	- web communication, newspapers, radios, television

From the table it can be seen that the action activities are set out in two directions in all cluster elements.

The first direction includes the identified activities, and the second covers their implementation.

The activities are differentiated into targeted geographic markets, targeted market segments and offer, while the implementation - management, marketing and communication / promotion.

Based on such exhaustive analysis, we came to the involuntary allocation of the established measures and activities that enable sustained development of the tourism strategy for each sector separately.

## 8. Conclusion

The requirements for defining and implementing specific development activities, and the absence of a positive approach for determining the major strategic directions for tourism development in the Republic of Macedonia, require eliminating the existing inconsistencies that have strategic developmental character and renewal of the accepted guidelines.

The results that we gained through these studies showed the existence of adverse conditions in the development of tourism which have diverse significance.

The Republic of Macedonia is lacking specific tourist products that could be competitive on a regional, European and world level and which would contribute to focusing its activities towards the changing trends of contemporary travel demand. Existing tourism products express a lack of organized approach and intersectional communication for their adequate promotion, organization and management. The conducted research has enabled us to have an insight into the current offer of the 5 projected thematic clusters and we came to the conclusion that tourism activities are reduced to an individual and disorganized approach of their valorization and marketing as well as not existing of necessary communication and collaboration between various stakeholders in the selected regional units.

Therefore we approached towards proposals for new redefined tourism products through the use of the cluster approach. These destinations would have recognizable dominant tourism elements and activities divided by type, in accordance with contemporary tourist market changes. Its tourism development activities would be designated, organized and operated around the main tourist potentials that each region has at its disposal and which represent their individual identification.

Through the research we decided to accept specifically determined action plans for implementation of the renewed strategy for tourism development in the Republic of Macedonia 2009-2013 and ascertain a clear development vision. Each thematic cluster has its own problems for the current inconvenient situation of tourism activities. The information that we gathered through the research have shown negative and adverse conditions of the existing tourist attendance, consumption, usage of the existing facilities and the need to create new facilities of attractive, receptive and communicative nature. The survey allowed us to propose precisely defined solutions for the specified problems in terms of required activities - targeted geographic markets, targeted market segments and offer, as well as from the aspect of implementation of proposed solutions - management, marketing, communication and promotion.

Through the defined conditions and proposed solutions, a new general framework for changing the current strategy and vision development in a tourism sense is provided.

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