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MACEDONIAN TOURISM IN ADITION TO CURRENT INTERNATIONAL TOURISM TRENDS

The intensive and rapid development of tourism worldwide and its quantitative and qualitative changes were initial reason for preparing this paper. Observation and analysis of the current trends on international tourist market are basis for analysing Macedonian tourism current situation within international current tourist trends. As main reason for such research was the actuality of changes in tourism. Through researches and elaboration of this paper the main intention is to comprehend the current situation of tourism in Republic of Macedonia. In this way suggestions and directions concernig the betterment and surpassing of current situations are given.

Having in mind the current situation and trends on international tourist market, Macedonian tourist industry should direct its efforts to approach them. It is necessary because there are very good prerequisites (abundance of ytourist attractiveness, solid basis of hotels and other accommodation capacities, and human resources which with additional training can meet tourist's needs) for achieving this goal.

Key words: international tourism; current trends; tourist market; tourist flow; macedonian tourism; Republic of Macedonia

INTRODUCTION

The analysis of current international tourist flow, its regional distribution as well as up to now tourist development indicates on the presence of certain trends. Among them as most impressive are the following: the extent of the tourist flow leading to enlargement of the scope of tourism; unequal regional distribution; spatial and seasonal concentration and diversification at the same time; deregulation; Incentive Travel; Inclusive Tours; timesharing; theme parks; amusement parks; resorts; development of internet technology; introduction and development of computer reserevation systems(CRS). In addition the following can be also mentioned: hotels fusion and development of hotel-chains; their diversification; structural changes in international tourist demand; tendency to build accommodation facilities that would best suit the needs of the various segments of tourist demand, and appearance of new kinds of tourism.

The continuous increase of tourist flow and unequal regional distribution of tourist arrivals are synonymous for modern tourism.

The spatial concentration is particularly present since the 1950s. The leading top 15 world countries by number of visitors are from Western Europe and North America which at the same time are also leading countries by realised incomes. Their participation in the total international tourist turnover is about 90%¹.

Seasonal concentration is typical for summer and winter period with domination of the summer season. There are significant changes in the spatial and seasonal diversification concerning in relation to the popularity of the countries as tourist destinations intraregional. Increasingly popular tourist world regions are Asia/Pacific, Africa and Latin America.

Oposite to the period of continuous growth and rapid development of tourism that was particularly characterised with seasonal concentration, in the last two decades the tendency of tourist flow diversification is very characteristic. This situation came as a result of the increase of leisure time and betterment of living standard. Instead of longer summer holidays, shorter summer holidays are more frequent and popular. All this induces development of sport, cultural, congress, rural and other kinds of tourism.

The appearance of new kinds of tourism is related to the structural changes in tourist demand, particularly from the aspect of the payment ability. As a result, tourists with lower incomes are more dominant, but it doesn't mean that the number of tourists with higher incomes is lower. On the contrary it also increases.

Structural changes in international demand induces changes in tourist supply as well. Tendency to build accommodation facilities that will suit various segments of tourist demand is present. The highest demand is registered for medium and small sized hotel facilities.

The deregulation in air traffic since 1978 enable air-companies independent performance on tourist market, price calculation and quality service's improvement. The deregulation induced positive tourist effects by increasing international tourist flow. This was as a result of the applied strategy for market segmentation and product differentiation, decrease of transport costs in the price of tourist arrangements, increased tourist flow and increased economic effects in all activities directly and indirectly connected to tourism.

Incentives increasingly become an important part of tourist offer as a special segment on tourist market. Their participation is about 10% which indicates the interest of employers to stimulate their employees. They are particularly characteristic for car industry, high-tech, banking and insurance companies.

Timesharing has been appeared since 1970s as a relatively new way of leasing accommodation units. The increased demand for such system of using accommodation units was a reason for touroperators and travel agencies to direct part of their activities to this market segment.

Theme and amusement parks and resorts are very attractive for the tourist market, because they have an influence on its segmentation. As a result of their attractiveness and diversify the number of visitor is increasingly every year. As for example, Disneyland (USA) has more than 35 millions visitors per year, Disneyland

¹ WTO, Mtn-Forum On-Line Library Document, Madrid, www.world-tourism.org, July, 2002

(France) – 10 millions, Six Flags (USA) – 3 million, and Asterix (France) – 2,5 million². As the above mentioned trends, the appearance of the parks and resorts is closely related to the rapid increase of tourism. Resorts as complexes which provide visitors with various entertainment services are usually identified tourist destinations due to their size. Concentration and fusion of hotel capacities and dispersion of hotel-chains is particularly characteristic for Europe and USA. But Europe has the role of a leader. EU member countries have registered the biggest number of hotels which are within hotel-chains. The concentration is particularly in Belgium, Netherlands, Luxemburg, France, Great Britain and Germany.³

1. CURRENT TRENDS OF TOURISM IN MACEDONIA

The analysis for the period 1990-2000 indicates a continue tourists flow decrease expressed by decline of tourist arrivals and tourist nights with low changeability without causing any changes.

In the period of analysis the turnover in 2000 is being decreased for 36% compared to 1990. This tendency which is typical for such long period is concerning particularly within context to recent situation in Macedonia. So it would be very optimistic to expect betterment in the following period at least not within the next 5-6 years (table 1).

Table 1

Structure of tourist flow in Macedonia for the period 1990-2000 (in 000)

Year	Visitors		Foreign in %	Nights		Foreign in %
	domestic	foreign		domestic	foreign	
1990	412,1	562,4	57,7	1.928,9	1.170,6	37,7
1991	415,9	294,3	41,4	2.164,1	576,3	21,0
1992	366,6	219,1	37,4	1.757,2	436,4	20,3
1993	439,5	208,2	32,1	2.343,7	362,7	13,4
1994	427,7	185,4	30,2	2.141,5	335,5	13,5
1995	356,8	147,0	29,1	1.528,5	275,7	15,2
1996	340,0	136,1	28,5	1.419,6	277,2	16,3
1997	330,5	121,3	26,8	1.321,6	265,5	16,7
1998	418,4	156,6	27,2	2.066,9	359,5	14,8
1999	368,8	180,7	32,8	1.838,7	474,3	20,5
2000	408,5	224,0	35,4	1.940,7	493,8	20,3

Source: Yearbook of statistics of R. Macedonia, 2001
Author's estimations

The tourist flow structure shows a decline by foreign visitors and spent nights in the same period. An exemption is the period 1998-2000 when an increase of foreign

² S. Unković et all., *Savremena kretanja na turističkom tržištu*, Beograd, 2002, pg. 154-165

³ Coach Omnium, L'Hotellerie, No. 2656, TOURISM, Vol. 49/1/2001

visitors is registered , but it still not overcome the number from 1990. The number of foreign visitors in 2000 compared to 1990 is being decreased for 13% and of domestic for 35%. This situation indicates a decreasing tendency in domestic tourist flow which is more expressed compared to foreign. Apart from political situation and instability, other reason for domestic tourist flow decrease is current economic crisis that reflects population's payment abilities.

The regional distribution of tourist flow does not indicate any changes in the same period of analysis. According to principles of regionalisation there are three tourist regions: western, middle and eastern. The western region register biggest number of tourist arrivals. It is due to the high concentration of natural and cultural tourist attractions in western region. As a result of this, macedonian most popular and developed tourist centres are situated here: Popova Šapka, Mavrovo, Ohrid, Struga, Prespa, Pelister and Krusevo.

Other tendency which is particularly characteristic is concentration of the tourist flow in lake areas, macedonian capital and ski centres. The analysis of tourist flow by type of tourist places shows the following (table 2):

Table2

Tourist arrival by type of tourist places in %

Year	Skopje	Spas	Ski centres	Lake areas	Other
1990	35,90	3,08	4,87	37,18	18,88
1991	31,15	3,70	7,85	40,85	16,44
1992	31,56	5,16	8,24	39,17	15,86
1993	28,00	5,19	7,86	45,39	13,53
1994	24,18	5,83	9,49	47,59	12,87
1995	23,78	4,17	12,12	45,34	14,57
1996	21,70	5,00	10,62	47,30	15,35
1997	21,07	5,45	10,92	46,94	15,60
1998	16,85	3,31	9,65	57,95	12,21
1999	19,84	3,59	9,67	53,42	13,45
2000	18,60	3,71	9,60	53,19	14,89
Average:	24,78	4,78	9,17	46,71	14,87

Source: Yearbook of statistics of R. Macedonia, 1995, 2001
Author's estimations

As it is showed in table 2 there is a concentration of tourist flow in lake areas and Skopje. Their average absorption is 70% of total tourist arrivals. This is also as a result of following:

- Skopje is a capital of Macedonia and at the same time administrative and business center;
- all state's institutions, important businesses, and national cultural centres and museums are in Skopje;
- lake areas absorb highest part of tourist arrivals (average 46,7%) because they're most developed tourist places in Macedonia as well (particularly Lake Ohrid);
- there is a good communication between lake areas and other regions. Highways are part of the regional and international road net. Airports Petrovec and Ohrid are in their vicinity.

A comparison between current trends being present on international tourist market and those present on Macedonian tourist market indicates the following:

- the international tourism register continue growth in international tourist arrivals. But we have an opposite situation in Macedonia: a continue decline of tourist arrivals is present more than a decade;
- there is unequal spatial distribution of tourist flow within tourist regions in Macedonia. It is similar on international level. Unequal spatial distribution is evident within world tourist regions and intraregional also;
- comparing to the tourist countries which have developed and dispersed timesharing, despite the efforts for implementing this system in Macedonia is not yet implemented;
- although there is a huge demand for resorts worldwide, despite the potentials for such tourist offer they are not present on Macedonian tourist market;
- a significant number of hotels and similar accommodation capacities follow current international tourist trends attempting to adjust their abilities and capabilities to them through improvement of service quality and human resource training;

2. CONDITIONS AND POSSIBILITIES FOR TOURISM IN MACEDONIA

The Republic of Macedonia is abundant with various cultural and historical values. They include findings from the history of different cultures which existed on this region. There is an evidence from the ancient period, Ottoman Empire and the recent history. This abundance together with the various natural attractions and geographical position are important prerequisites which contribute to tourist attractiveness for Macedonia.

Natural attractions play a huge role in its tourist offer. We can even say they are its basis. Most of them are valued and represent significant component of the Macedonian tourist offer.

In the tourist development of Macedonia the following natural attractions have a significant role: geomorphological, climatic, hydrographical, biogeographical and the natural-scenery tourist values.

The abundance of the natural and cultural and historical values represent a significant potential for tourist offer in Macedonia. Their appropriate inclusion is essential for the tourist offer creation. In addition up to date information about the actual tourist market situation, particularly tourist demand with its preferences and affinities, is necessary. We also have to keep in mind our comparative advantages in relation to our competitors.

Besides tourist attractions, receptive facilities have an important role for the attractiveness of tourist destinations. Having in mind the theoretical postulates about the concept of receptive facilities, the analysis concerning their structure in Macedonia has shown the following: a tourist destination should have not only food and accommodation facilities but it also should have other forms of content to fulfill and enrich tourists' stay.

The presence of such content is necessary because tourists who participate in tourist travels have different needs, wishes, characters, different money abilities, and many other differences.

Among the receptive facilities which are necessary for appropriate tourist destination's development towards meeting tourists' needs, the opinion is that particularly important is the presence of the following:

- specially designed and adjusted urban units with entertainment and different merchant shops intended for tourists' needs;
- different buildings for cultural, sports and entertainment activities: concert halls, theatres, terraces, sport facilities, recreational complexes, etc.;
- well organised picnic areas;
- good transport communication with surrounding places, picnic areas, PTT communications, taxi services;
- rent-a-car, rent-a-boat;
- banking services;
- organised first-aid service and
- ski-schools; renting sport requisites.

The analysis of the current conditions in Macedonia indicates lack of such content of receptive facilities. It is due to unproportional ratio between these facilities and food and accommodation facilities. The conclusion is that such condition is a result of a very low interest for these capacities and insignificant investment in this sphere.

In many developed tourist countries (e.g. Spain, France, Italy, USA) this content of receptive facilities is important part of their tourist supply. Although it is well known that these facilities enrich and prolong tourist's stay unfortunately in Macedonia there is a situation where significant activities are still not undertaken.

The lack of such receptive facilities is present all over the country, and also in the most popular tourist center-Ohrid. These facilities do not satisfy tourists' needs yet although some steps are undertaken in this direction. For example: the spatial settlement around hotel complexes "Metropol" and hotel "Granit" is too little compared to needs for settled picnic-areas, sport and recreational centres, indoor swimming pool, authentic-ambiental restaurants etc. similar condition is registered in other tourist destination, also (e.g. ski-centres, problem with services for renting ski-equipment, efficiency of skiing schools etc.)

Unfortunately spas in Macedonia are being used for medical treatments, and because of that there is lack and even absence of above mentioned receptive facilities. Only few have sports-swimming pools recreational facilities, and appropriate medical services which should have special medical programs , e.g. different diets for losing weights, beauty treatments, fango-treatment etc.

In the vicinity of the large urban centres, there is a need for well-organized picnic areas, recreational areas, complex sport and recreational centres, pedestrian and bicycle tracks, etc.

Therefore the existing disproportion should be reduced as soon as possible, and the creation of this receptive facilities has to be considered.

CONCLUSION

Compared to current situation and trends of tourism worldwide to tourism in Macedonia we've come to certain conclusions.

Macedonia tourism doesn't keep step with current trends in international tourism. In this direction, an appropriate steps should be taken to overcome this situation of tourism in Macedonia, and to get closer to current trends.

It is necessary to use the potential of tourist attractions, to create a specific, characteristic and branched macedonia tourist product which will enable attraction of new tourist targets, domestic and foreign as well.

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