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Preliminary communication
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ANALYSIS OF TOURISM INDICATORS IN FUNCTION OF TOURIST OFFER ENRICHMENT IN MACEDONIA

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Abstract

The tourism in Macedonia according to relevant statistical indicators still is or is longer on low (unsatisfactory) level, which is expressed both by the number of tourists visiting the country and by the number of realized overnights by tourists. Another feature of tourism in Macedonia is its emphasized seasonal character, which the authors considered as a negative trait. To improve the current situation in the tourism industry in Macedonia it is necessary to improve and enrich the tourist offer. According to the authors one of the best ways to improve the quality of the tourist offer is through actualization, promotion and strategic management of the events in function of tourism. The aim of the paper is to show how through correct strategy and event management can significantly improve the situation in tourism on the basis of all the above mentioned indicators, especially when it comes to the seasonal nature of tourism and to make certain dispersion of tourist movement beyond the traditional tourist destinations in the country.

Keywords: events, development, tourism product, dispersion of tourists.

Jel Classification: Q26; L83

INTRODUCTION

Tourist offer of the Republic of Macedonia is still too traditional, i.e. it mostly consists of summer mass tourism and winter tourism as a major tourist forms. As a result of such tourist offer it is normal to have weak or insufficient tourism development in the state, which through statistical indicators will be presented in the paper. The authors in the analysis of this unsatisfactory situation proceed from the assumption that the level on which tourism is placed in the country largely depends on tourism product which is offered on the modern tourist that in terms of the product is becoming increasingly

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fastidious. This leads to the thinking that enrichment and expansion of the tourism product is necessary but with greater participation of some of the specific tourism forms. Such alternative authors perceive in manifestations—events, which with their specifics should contribute to the enrichment of the tourist product, the dispersion of tourist offer through other cities in the country as opposed to the current concentration in few cities - tourist destinations, time dispersion of tourist movement or initiation of tourist movement throughout the year. The great impact on events is emphasized by multiple authors. The world tourism, a growing importance is given to the event as a tourist product, which is best manifested through the new trends in the tourist supply aimed at increasing the interest in learning about cultures, customs and traditions of different countries and areas (Susic and Djordzevic 2011). In order manifestations—events in Macedonia to become a major part of the tourism product, strategic management is necessary their and of course the appropriate PR—approach and strategy.

1. METODOLOGY

The methodological approach in the preparation of this paper consists of two parts. In the first part an analysis of the current level of tourism comprehension in Macedonia is made, which is expressed through tourism statistical indicators, while in the second part solutions that should enrich and supplement tourism product of the country taken as a whole as a tourist destination are offered.

In preparing the paper more scientific research methods are used in order to obtain relevant results, such methods are: 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. REVIEW AND ANALYSIS OF THE TOURIST ARRIVALS AND OVERNIGHTS

The main indicators that indicate the level of tourism development in Macedonia are the number of tourist arrivals, the number of realized tourist overnights and realized tourist turnover i.e. tourist consumption.

Table 1. Tourist arrivals in the period from 2004–2014

Year	Tourist arrivals		
	Total	Domestic tourists	Foreign tourists
2004	465.015	299.709	165.306
2005	509.706	312.490	197.216
2006	499.473	297.116	202.357
2007	536.212	306.132	230.080
2008	605.320	350.363	254.957
2009	587.770	328.566	259.204
2010	586.241	324.545	261.696
2011	647.568	320.097	327.471
2012	663.633	312.274	351.359
2013	701.794	302.114	399.680
2014	735.650	310.336	425.314

Source: State statistical office of the Republic of Macedonia 2015, 11, table 1.

From the data presented in Table 1, it is immediately evident that the general increase in the number of tourists who have visited the Macedonia for the ten-year period that has been processed. The total number of tourists who visit the country in over a year, is the largest in the last year 2014, while the lowest is in the first year that was analyzed i.e. in 2004, but the marked increase in the absolute number is 270 545 tourists i.e. expressed in a percentage it is a growth in the number of tourists for 58.2%.

Sizable movement of tourist visits during the ten-year period, is with some oscillations in the period from 2004 to 2010, but then it is noticed a steady increase from 586,241 tourists in 2010, up to 735,650 tourists in 2014, it has increased by 149 409 tourists a year or in terms of percentage this represents an increase of 25.5%.

What is particularly important in the analysis of the number of tourists who have visited the destination is the quantity of domestic and foreign tourists; here the data are quite optimistic, particularly in relation to the number of foreign tourists.

The dynamics of the number of domestic tourists is quite less, so in 2014 compared to 2004 it has increased by only 10627 tourists expressed in absolute numbers or percentages that is an increase of only 3.5%, while during the examined period oscillations of 297,116 tourists are observed in 2006 and up to 350 363 domestic tourists in 2008, which is the best year in terms of the number of domestic tourists. But the situation is quite different when it comes to foreign tourists visiting the country, so there is an increase in the number and continuity of 165,306 foreign tourists in 2004 when their number increased to 425,314 tourists in 2014, in absolute numbers it is an increase of 260,008 tourists or in percentage it is an increase of 157.3%.

The dynamics of a sizable movement of the total number of tourists, both domestic and foreign tourists in the period from 2004 to 2014, is graphically shown in the next graph.

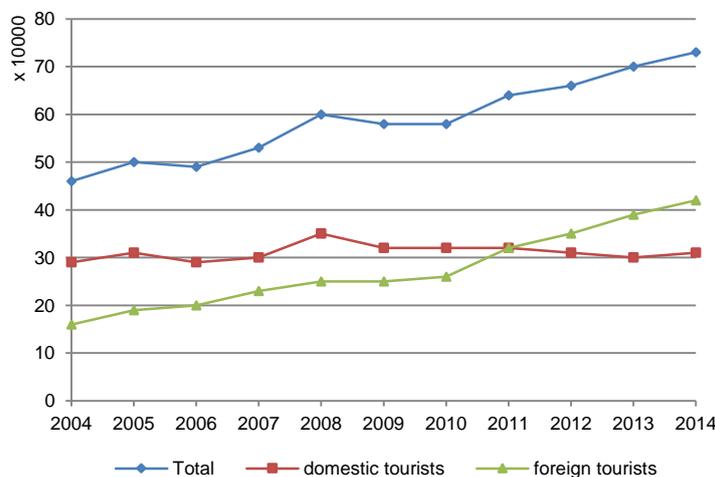


Figure 1. Tourist arrivals in the period from 2004–2014

Such a large percentage of the growth in the number of foreign tourists, as well as in the total number of tourists in the ten-year period at a glance is an indicator of great

tourist development of the country. However, to get a better idea of tourism development other indicators of tourism development must be analyzed, because tourism growth (*represented as the number of tourists*) does not always have to mean that there are developments that follow up the growth.

The following table presents the indicators of realized tourist overnights per year during the period from 2004 to 2014, which can be seen as the absolute number and so the average length of stay of tourists, which is an important indicator for the analysis of the country's tourism development.

Table 2. Tourist overnight in the period 2004–2014

Year	Tourist overnight stays		
	Total	Domestic tourists	Foreign tourist:
2004	1 865 434	1 504 845	360 589
2005	1 970 041	1 527 053	442 988
2006	1 917 395	1 474 550	442 845
2007	2 019 712	1 501 624	518 088
2008	2 235 520	1 648 073	587 447
2009	2 101 606	1 517 810	583 796
2010	2 020 217	1 461 185	559 032
2011	2 173 034	1 417 868	755 166
2012	2 151 692	1 339 946	811 746
2013	2 157 175	1 275 800	881 375
2014	2 195 883	1 273 370	922 513

Source: State statistical office of the Republic of Macedonia 2015, 11, table 1.

The data in Table 2, reflected growth in the total number of realized overnight stays by tourists in the analyzed period. That growth expressed in absolute numbers is equal to 330,449 overnight stays in 2014 compared to 2004, which in percentage is 17.7%, if this data is compared to the growth in the number of tourists (Table 1) it may be noticed that the growth of realized nights does not follow the growth of realized tourist visits, the difference is 40.5%.

Realized number of overnights by domestic tourists in the analyzed period it is recorded a decline and oscillations in the numbers throughout the period, i.e. in 2004 domestic tourists realized 1,504,845 overnight stays while in the last analyzed year there was a decline of about 231 475 nights, or in percentage it was 15.4%. But the situation with overnights spent by foreign tourists is considerably better, because there is the biggest growth for the analyzed period and is 155.8%, i.e. out of the realized number of 360 589 overnights in 2004, the number increased to 922,513 overnights realized in 2014.

The evident growth realized by the foreign tourists is particularly significant in terms of the expected tourist trade (especially foreign exchange earnings) which should monitor the growth of realized overnight stays.

The dynamics of a sizable movement of overnights spent by the total number of tourists, domestic as well as foreign tourists in the period from 2004 to 2014, is graphically shown in the next graph.

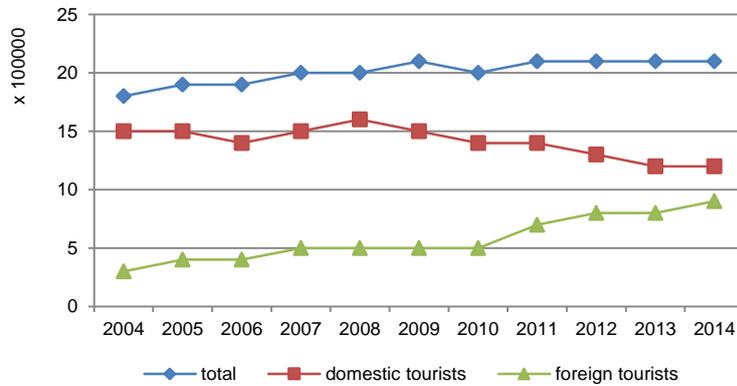


Figure 2. Tourist overnight in the period 2004–2014

Next indicator of tourism development that can be obtained from the data analysis from Tables 1 and 2 is the average length of stay of tourists, as the total number of tourists and as well as individually on the domestic and foreign tourists. According to these indicators in relation to the total number of tourists, the average length of stay of tourists in 2004 in our country was 4.01 days, while in the last analyzed 2014, the number was 2.98 days, which shows a decrease in the average length of stay tourists to 1.03 days, or in percentage it is a drop of 25.6% which is not negligible. Domestic tourists in 2004 in destinations in the country stayed 5.02 days in average, while in 2014 their average stay was 4.1 days, which is a decrease in the average stay of 0.92 days, or in percentage decrease of 18.3%. The situation is similar among foreign tourists in 2004 staying in the country on average 2.18 days, while in the latest 2014 year; the average length of their stay was 2.16 days, an insignificant decrease.

The dynamics of a sizable movement in the average length of stay of the total number of tourists, domestic as well as foreign tourists in the period from 2004 to 2014, is graphically shown in the next graph.

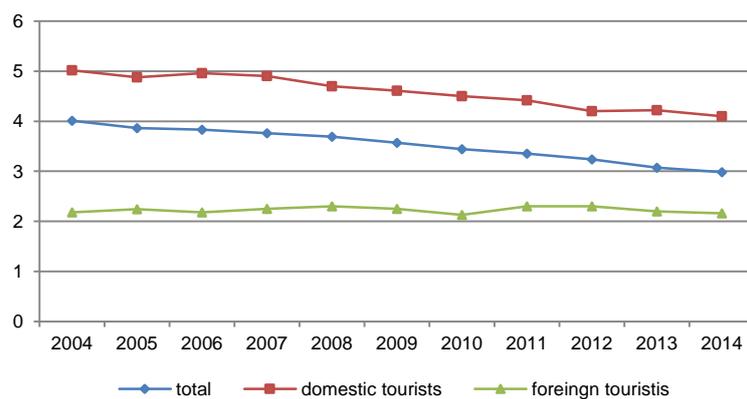


Figure 3. Average length of stay of tourists in the period 2004–2014

The last indicator that is important in order to understand the country's tourism development is the realized tourism turnover, that besides being an economic indicator of income from activities it also indicates whether there is a real tourist destination development. The indicators of realized tourism turnover in the last five years from 2010 to 2014 are presented in the following table.

Table 3. Realized tourist turnover in the period 2010–2014

Realized tourist turnover	
Year	Euros
2010	119 746 060
2011	127 302 001
2012	133 001 037
2013	137 118 387
2014	124 208 919

Source: State statistical office of the Republic of Macedonia 2015, 589, table 14.

The data in Table 3 shows that the realized tourist turnover during the analyzed period, certain oscillations, but it generally marks certain increase in 2014, when the turnover was 119,746,060 Euros, compared to 2010, when the turnover was 124 208 919 Euros, the increase in turnover amounted to 4,462,859 Euros, or in percentage this increase was 3.72%. But it is also important to look at the movement of tourist turnover in the last four years from 2011 to 2014 when a decrease is noted, which is especially emphasized in 2014 compared to 2013 and to 12,909,468 Euros, or in percentage it a decrease of 9.4%. The dynamics of realized tourist turnover for the analyzed period is shown in the next graph.

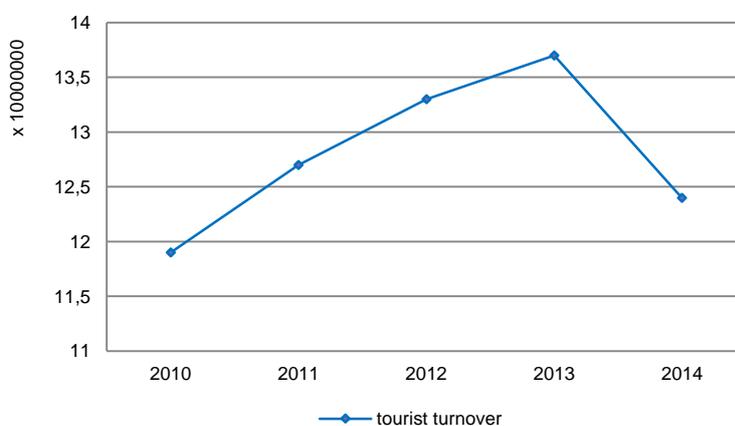


Figure 4. Realized tourist turnover in the period 2010–2014

The analyzed data from Tables 1, 2 and 3, the real conditions are perceived in the tourism development of the country, which indicates the following: in the analyzed period there is a continual increase in the number of tourist overnights and tourist movements, which indicates growth, but when the data for length of stay is analyzed and especially the realized tourism turnover, a decline of the same is noted. This indicates

that the country, despite of the growth in the number of tourists who visit, there is no satisfactory tourist development i.e. has a small average length of stay of tourists, which normally results in a reduction of the actual tourist turnover.

3. REVIEW AND ANALYSIS OF SEASONALITY AND SPATIAL DISTRIBUTION OF TOURISTS

For the need of the research in this paper, seasonality of the tourist movement in the country and the visit of tourists by types of tourist will be analyzed. The seasonal nature of the tourist movement in months is presented in the following table.

Table 4. Tourists arrivals by month in the period 2010–2014

Year		Tourists arrivals by month											
		I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII
2010	Domestic	13608	12771	11620	16718	26819	24376	75867	77060	16779	18690	11377	18860
	Foreign	12264	13277	14769	19409	28401	27220	28738	32 231	28144	23504	18229	15510
	Total	25872	26048	26389	36127	55220	51596	104605	109291	44923	42194	29606	34370
2011	Domestic	14029	11913	12537	13897	21779	21556	80499	78211	20605	17597	11731	15743
	Foreign	14067	15242	19434	23245	34315	33767	39271	40130	38015	31782	21079	17124
	Total	28096	27155	31971	37142	56094	55323	119770	118341	58620	49379	32810	32867
2012	Domestic	15845	9192	12849	14114	23435	23343	74042	72859	19331	18390	14244	14630
	Foreign	17903	14351	19243	26586	37340	39873	42871	41695	41097	33122	20512	16766
	Total	33748	23543	32092	40700	60775	63216	116913	114554	60428	51512	34756	31396
2013	Domestic	15391	10209	11719	14596	22737	21519	64330	78484	16986	19517	13237	13389
	Foreign	16373	15390	22776	27784	44851	46303	47290	49123	46841	41783	20876	20290
	Total	31764	25599	34495	42380	67588	67822	111620	127607	63827	61300	34113	33679
2014	Domestic	14496	11257	14137	16401	25726	19175	55243	88072	16820	22317	14229	12463
	Foreign	16340	16021	22153	28077	50 93	51498	51988	57373	49213	39762	22246	19950
	Total	30836	27278	36290	44478	76419	70673	107231	145445	66033	62079	36475	32413

Source: State statistical office of the Republic of Macedonia 2015, 12–13, table 2.

The data in the table shows the evident seasonality of tourist movement throughout the five-year period from 2010 to 2014. Lowest sizable movement of tourists there in the winter part of the year, i.e. in the months I, II, XI and XII, while the tourist movement has the largest value in the summer part of the year, in the months V, VI, VII and VIII. For example, you can compare the arrival of tourists by months in 2014, where it is seen that the total number that visited the country in the VIII -th month is 145 445 tourists that is for 118 167 more than in the II-nd month when the country was visited by 27278 tourists, or the most visited month of the year has 81.2% more tourists compared to the month that has the smallest number of tourists. The seasonal character also is reflected by the fact that in the summer part of the year (VI, VII and VIII month) the country is visited by 44% of the total number of tourists throughout the year. The seasonal nature of the tourist movement in the country is shown in the next graph.

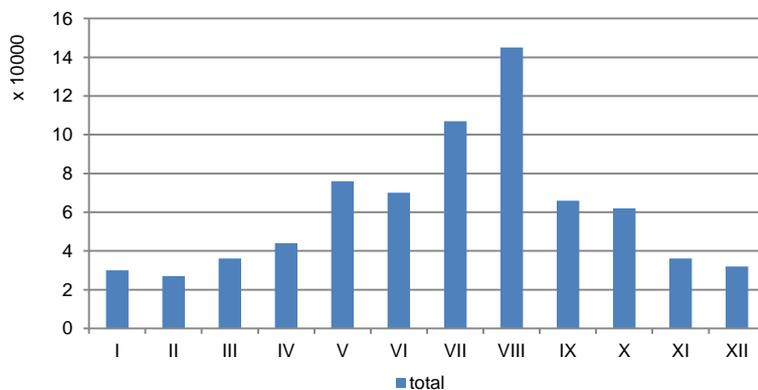


Figure 5. Tourist arrivals by month in the period 2010–2014

The next indicator that is analyzed in the paper is the visit of tourists by the type of destination that they have visited. These data should show the spatial distribution of tourists and also it should present the most attractive destinations, that according to the authors will detect the forms of tourism that are the most common, and as well as to get a basic idea about the tourist offer in the destination. Data on tourist visits by type of tourist destination is given in the following table.

Table 5. Tourist arrivals, by types of resorts in the period 2010–2014

types of resorts Year	Tourist arrivals, by types of resorts				
	Skopje	Spa resorts	Mountain resorts	Other tourist resorts	Other resorts
2010	126 327	28 574	71 457	263 278	96 605
2011	141 386	27 441	71 309	279 695	127 737
2012	152 412	27 430	68 809	280 375	134 607
2013	168 623	28 405	68 745	300 540	135 481
2014	181 835	29 532	64 707	318 972	140 604

Source: State statistical office of the Republic of Macedonia 2015, 16–17, table 4.

The table shows that each year of the analyzed five-year period 2010–2014, the largest tourist visits are conducted in other tourist destinations (according to the State Statistical Office: Ohrid, Struga and Dojran), while the smallest tourist visit is realized in Spa resorts, if only tourist destinations are considered, but it should be taken into consideration that in Other resorts, which are not tourist destinations and also cover most of the country also have a very small number of tourist visits. Traditional tourist destinations in the country (Ohrid, Struga, and Dojran) in 2014 had 318,972 tourists, representing 43.35% of the total number of tourists who visited the country that year, while in all resorts and the City of Skopje (no Other resorts) there were 595,046 tourists, representing 80.88% of the total number of tourists that year, and the remaining 19.12% of tourist arrivals were realized in the Other resorts. The following graph provides a graphical display of tourist arrivals in the country according to the types of tourist destination.

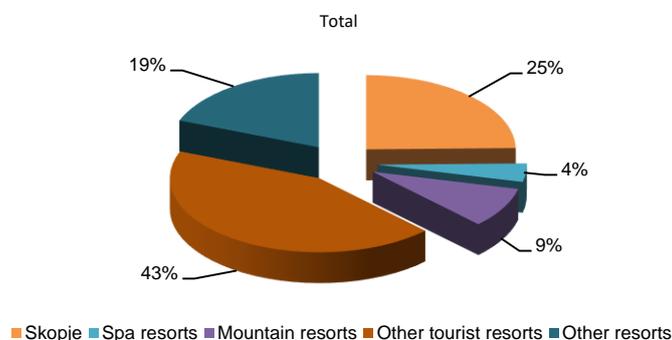


Figure 6. Tourist arrivals, by types of resorts in the period 2010–2014

This spatial imbalance in terms of tourist visiting the relatively small territory that occupies the Republic of Macedonia (25713km²), the authors considered one of the reasons for the insufficient level of tourism development, which is perceived analyzing the previous indicators. Also the authors have in mind that most visited traditional tourist destinations with 43.35% of the total number of tourists, who represent destinations with developed summer tourism, which suggests a certain uniformity of tourist offer concentrated in summer tourism.

4. THE MANIFESTATIONS — AN OPPORTUNITY TO ENRICH THE TOURIST OFFER IN THE REPUBLIC OF MACEDONIA

It is necessary to change the unfavorable spatial distribution of tourist movement in the country i.e. it is necessary to make efforts for a greater dispersion of tourist movement to other areas in the country (statistics recorded as Other resorts), in order to extend the tourist season, to reduce the emphasized seasonal nature of tourism in the country but also at the same time to increase the number of tourist arrivals and the realized tourist turnover. According to the authors it is possible to achieve enrichment of the diversity of the tourist offer in the country, taken as a whole in tourist terms, especially actualizing the events (all kinds of events) that are held in other cities and towns in the country in the Group—Other resorts. Events policy needs to recognize the complexity of stakeholder interests in events, and acknowledge that there are multiple motivations, needs, expectations and attitudes with respect to the development and implementation and management of events (Dredge and Whitford 2010). It means that in the country's tourist offer special attention should be paid to the specific tourism form - Event tourism, which the authors considered as one of the tourist forms through which the goals previously presented can be realized. This thinking is supported by the definition of events tourism by Yulan Y. Yuan, which event tourism defines as major one-time or recurring events of limited duration, developed primarily to enhance the awareness, appeal and profitability of a tourism destination in the short or long term, clearly, event tourism serves as an instrument in facilitating community-building, fostering urban renewal, and spurring tourism development to provide a better quality of life and environment (Yulan 2013). The manifestations that are traditionally held in towns and

cities across the country, should be part of the overall tourism product or should be incorporated as an integral part of the tourist offer and thus to present a pull-factor to attract tourists to the destination, whether it comes to tourists who specifically attend the event or for tourists who are already in the country and the event would be an additional attraction, anyway manifestations have positive influence on tourism development at local and regional level. These festivals provide new opportunities to attract visitors to the festivals in order to increase the appeal of a tourist destination (Lopez-Bonilla, Lopez-Bonilla, and Sanz-Altamira 2010).

The Republic of Macedonia as a small country, with a emphasized seasonal nature of the tourism movement and spatial concentration of tourists to several destinations, it should use the ethno-social characteristics of the population which is expressed through manifestations which are quite numerous and are organized in a number of settlements places, but also need to use the contemporary events in which are more promoted, organized and actualized in the country. Event planners need to create synergies among different events and integrate associated economic, tourism, leisure, sport, or socio-cultural objectives by formulating and implementing joint strategies (Ziakas 2010). Normally, all events are not all equally important to the development of tourism and each one of them do not have the same attractiveness to attract greater number of tourists, so special attention should be paid to major events and manifestations that are characterized by large and attractive attributes and can represent and independent tourists motives, the importance of major events in stresses by Getz, who says: all types of planned events have tourism potential, but larger events (in the domains of sport, festivals and other cultural celebrations and business) dominate in the literature and in event tourism development (Getz 2008). Therefore, the following table provides a basic overview of some of the major events in the country.

Table 6. Some of the more important events in Macedonia

Event	Location	Month	Visitors
Strumica Carnival	Strumica	II-III	over 50.000
Carnival „Prochka“	Prilep	II-III	over 30.000
Carnival „Bamburci“	v. Ratevo	I	over 4.000
Beer Fest	Prilep	VII	over 350.000
Pivolend	Skopje	IX	over 150.000
Vinoskop	Skopje	IX	over 20.000
Vevchani Carnival	v. Vevchani	I	over 10.000
Galichnik Wedding (Galichka svadba)	v. Galichnik	VII	over 5.000
Ohrid Summer Festival	Ohrid	VII - VIII	over 20.000
Skopje Jazz Festival	Skopje	X	over 5.000

Source: Perisic 2015, 18, table 3.

The data in the table presenting basic information on some of the most significant events in the country shows clearly that they attract a lot of visitors, in a very short period of time, because time character of the manifestations is short, usually they last one to two days. Another feature except large attendance is spatial dispersion, that many of the manifestations are held in places that are not traditional touristic. Next feature is the period when the manifestations are held, according to which they affect the extension of the tourist season or cushion the seasonal nature of the tourist movement in the rest of the year. Especially, the authors take into consideration the impact that manifestations have, particularly the larger and more massive visited ones (Beer Fest Prilep, Strumica Carnival, Strumica ...) on the establishment and recognition of these cities as manifestation—event or carnival cities, since these events are part of the tourist and

cultural program of the same, this way they are branded i.e. the events brand the cities. City events can be seen as a tool of city branding, they are “planned events” or spatial-temporal phenomena, which are unique because of “interactions among the setting, people, and management systems-including design elements and the program (Gelders 2012). Despite the branding of cities and their greater tourist activation, manifestations and events have a major impact on the local community, its influence is evident in the economic, social, cultural, environmental and political terms. Festivals are emerging worldwide as a growing and vibrant sector of the tourism and leisure industries and are seen to have significant economic, socio-cultural and political impacts on a destination or host community (Arcodia and Whitford 2006).

CONCLUSION

According to the processed data and conducted analysis, it can be concluded that the understanding the condition of tourism in the Macedonia during the analyzed period is as follows:

- a significant increase of 58.2% on the tourist movement, expressed in the number of arrivals of tourists, even more important it is that the increase in the arrival of foreign tourists is 157.3%.
- also it is found an increase of 17.7% in the realized overnights by the tourists, which generated an increase in overnight stays by foreign tourists accounted for 155.8%.
- the average length of stay of tourists in the analyzed period decreased by 25.6%.
- realized tourist turnover during the examined period marks an insignificant growth
- seasonality of tourist movement is visibly expressed, so most of the tourists visiting the country during the summer months of the year
- examining the analysis of the data it can be recorded and the spatial character of tourist movement, where it is evident that the tourist movement is so frequent in Other resorts.

The processed data suggest that although there is growth or an increase in the number of tourist arrivals, there is no evident tourist development that is also indicated by the other data. The reason for this unfavorable situation the authors detect in the less attractive and traditional tourist offer of the country, which is focused on a massive summer and winter tourism. The authors believe that it is necessary to enrich the tourist offer of the country with new, attractive tourist products, which will lead to spatial dispersion of tourists in other parts of the country and initiating the tourist movement throughout the year, it would lead to a greater number of visitors, increased tourist spending, which ultimately should result in greater tourism development due to better tourist offer.

One way to achieve the desired improvement of the tourism product in the country, the authors see in the increasing affirmation of events (all events) and their significant involvement in the strategies for tourism development on national and local level, and thus the aforementioned desired effects will be achieved.

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