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Faculty of tourism and business logistics -
Gevgelia**

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CHALLENGES OF TOURISM AND BUSINESS LOGISTICS IN THE 21ST CENTURY



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PREFACE

The Faculty of Tourism and Business Logistics in Gevgelija, at the Goce Delcev University - Stip, hosted the First International Scientific Conference, "Challenges of Tourism and Business Logistics in the 21st Century".

The conference was held on 24 and 25 October 2017 in Gevgelija with an optional visit to Dojran - Dojran Lake.

32 works of 60 authors from Serbia, Latvia, Turkey, Poland, Bulgaria, Kosovo and Macedonia were presented at the Conference.

The purpose of the Conference is exchange of ideas and experiences of the participants coming from Macedonia and abroad, and establishment of cooperation for further development of tourism and business logistics in Macedonia and beyond.

The results of the Conference are visible through publication in a collection of papers, which is presented to a wider scientific audience and the public.

In this way, we want to promote the Faculty of Tourism and Business Logistics, to promote Gevgelija and Dojran as the most visited settlements in the south-eastern part of Macedonia.

Gevgelija - Stip,
December 2017

Editor
Nikola V. Dimitrov Ph.D. *Dean*

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ANALYSIS OF THE NUMBER OF OVERNIGHT STAYS AND THE NUMBER OF FOREIGN TOURISTS IN THE REPUBLIC OF MACEDONIA IN THE PERIOD 2006-2015

Darko Majhosev¹, Cane Koteski²

Abstract

This paper analyzes two aspects of foreign tourists traffic in the Republic of Macedonia. The first aspect deals with the number of foreign tourists' overnight stays between 2006 and 2015, while the second aspect analyzes the number of tourists who visited Macedonia by countries.

In this paper we will answer the question whether the number of tourists in this period increased, decreased, or maintained the same level, as well as the number of incoming tourists from each country.

Our research is working on the basic assumption that the number of foreign tourists constantly increased in the period, with most of the tourists in Macedonia coming from its neighboring countries, cherishing a tradition of historical links and cultural ties with our country. The analysis will demonstrate whether our assumption proves valid.

The research results will be displayed in tables and graphs to clearly show the fluctuation in the number of overnight stays and the number of tourists by country. Finally, the research results will be presented.

Key words: *foreign tourists, number of foreign tourists, overnight stays of foreign tourists, travel agents.*

1. Introduction

This is an analysis of the stay of foreign tourists in the Republic of Macedonia, in terms of a number of overnight stays and countries for the period 2006-2015. In our research we used several research methods: method of analysis of document content, synthesis, statistical method, etc. We divided our research into two periods, from 2006 to 2010, and from 2011 to 2015. We expect our analysis to show certain trends in the number of overnight stays per country.

Tourism is by definition a "business activity which includes travel for recreation, leisure or business purposes"³. Tourism is a specific phenomenon that

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³<https://mk.wikipedia.org/wiki/Туризам>

acts multiplicatively on the various aspects of the socio - economic life of certain regions, states, and even continents.¹

Tourism includes several economic activities (catering, traffic, travel agencies, trade, crafts, communal activities, etc.). It is not a medical branch, but includes many activities of medicine (health tourism). Although not a branch of culture, it covers many fields of cultural activity (cultural - historical heritage, cultural manifestations, music, folklore, etc.). It covers many sports activities, although it is not a branch of sports (sports recreation, sports events, etc.). It is not a political phenomenon, but it is in multiple interdependence with the political climate in the country. It is not considered a natural phenomenon but is in multiple interdependence with natural phenomena (climate, hydrography, fauna, flora etc.).²

There are numerous definitions of tourism, but the most acceptable is the definition given by the Swiss Hunziker and Krapf in 1942, which reads as follows: "the totality of the relationship and phenomenon arising from the travel and stay of strangers, provided that the stay does not imply the establishment of a permanent residence and is not connected with remunerative activities".³

The following factors influence the popularization of tourism: economic factors (raising the standard of living); technical factors (traffic modernization); social factors (population increase); factors of institutional character (leisure time, social policy, etc.) and other factors of psychological and irrational nature (fashion, snobbery, etc.).⁴

Through the tourist visits to other countries a tourist builds the first perception of the country in which he was staying. Hence, we say that tourism is the "mirror" of a state. The best advertising for any country is tourism. The tourist is the main subject of tourism. Everything revolves around him and his needs, above all in relation to his stay and satisfaction. A satisfied tourist is the best advertisement for tourism and the resort in which he stayed.

The [World Tourism Organization](#) (WTO), as a specialized organization of the UN, defines tourists as people "traveling to and staying in places outside their usual environment for more than twenty-four (24) hours and not more than one consecutive year for leisure, business and other purposes which are not related to the pursuit of activities paid in the place of visit".⁵

¹In addition to strongly influencing economic development, tourism also affects the development of human consciousness, not only of direct participants in tourism, but also indirectly other social categories. In fact, it has an impact on the overall development of society.

²Јаковлев, З., (2000), Анимацијата во туризмот - најзначаен сегмент на туристичката понуда, Економија и бизнис, списание за теорија и практика, Еуро - Мак - Компани, Скопје, стр. 21.

³Hunziker, Krapf, цитат според Ацковски, Н., Политика за развој на туризмот, авторизирани предавања, Универзитет „Св. Климент Охридски“ - Битола, Факултет за туризам и угостителство - Охрид, Охрид, 45.

⁴Мојсоски, В., Шуклев, Б., Планирањето и деловната политика во претпријатието, Институт за истражување на туризмот - Охрид, Охрид, 1995, 24.

⁵ <https://mk.wikipedia.org/wiki/Туризам>

The statistics show that in certain countries that are naturally and geographically predetermined for tourism development, this activity accounts for over 3% of GDP (Gross Domestic Product). This business activity has a continuous growth over a longer period of time, as indicated by statistical data. Tourism is a flexible and sustainable activity even in times of global economic crisis. If in conditions of global economic crisis economic growth in most countries in the world declines, tourism shows a tendency of growth, which is a specific phenomenon.

In the Republic of Macedonia tourism has similar trends as in other countries in the world. This activity shows a tendency of positive movement and we will try through our research for the period from 2006 to 2015 to find out the extent of this movement, the structure of tourists, the types of tourism, from which countries the tourists come, etc. This is a long-term follow-up of the tourist movements in the Republic of Macedonia from which appropriate conclusions can be drawn and appropriate measures taken by the state such as adoption of strategies for the development of tourism, i.e. action plans.

2. Tourists by countries of origin in the period 2006-2010

The greatest influx of foreign currency in tourism in our country and in the world comes from domestic and foreign tourists. In creating the development strategy of tourism in our country it is necessary to do an analysis of the number of tourists for each tourist season for both domestic tourists and tourists by countries of origin who visited our country and realized overnight stays in the period 2006-2016.

In order to see how the number of tourists changed by country of origin in the period 2006-2016, we will use the data from Table 1.

Table 1. Tourist arrivals, by country of origin in the Republic of Macedonia (2006-2010)

Ord. No.		2006	2007	2008	2009	2010
1	Domestic	297.116	306.132	350.363	328.566	324.545
2	Foreign	202.357	230.08	254.957	259.204	261.696
3	Total	499.473	536.212	605.32	587.77	586.241

The data shows that in the period 2006-2010, the highest number of foreign tourists who visited the Republic of Macedonia was realized in 2008 when the number of tourists was 605,320. In the period 2008-2010, the number of foreign tourists saw a and in 2010 it was 586,241.

In addition, the number of domestic tourists was the largest in 2008 when there were 353,363 tourists, and in the period 2008-2010 we had a slight decrease in the number of domestic tourists. The number of foreign tourists reached the highest point in 2010, amounting to 261,696. The increase in the number of foreign tourists is due to the joint appearance of tour operators at tourist fairs, better advertising, better presentation of accommodation facilities through their own web pages, improvement of air and road transport and, of course, favourable arrangements.

Seen from the perspective of tourists by countries, from the data given in the table from 2006, we can notice that the largest number of foreign tourists in the Republic of Macedonia came from Greece 30,835, followed by Bulgaria with 17,421 and Albania with 16,188 tourists. In 2008, tourists from Serbia, Albania and Bulgaria reached their maximum and the numbers were 45,134, 19,314 and 21,922 respectively, while the number of tourists from Greece suffered a decline falling to 21,060. In 2010, the trend of high number of visits by foreign tourists from the neighboring countries continued. The guests from Serbia were in the first place with a number of 35,840, second were the tourists from Greece with 26,843, followed by Albania with 17,110, Bulgaria with 15,513, etc.

According to the conducted analysis of tourists by continents, in 2006 most tourists arrived from the USA 8.275, Australia 2.014, and Japan and Asian countries with 1.212 tourists. In 2008, the United States, Australia and Japan had an increased number of tourists 8,472, 3,165 and 1,236 respectively, while in 2010 the number of tourists from the United States decreased to 7,655 and the number of tourists from Australia and Japan increased to 3,967, and 1,621 respectively.

3. Overnight stays of tourists by countries of origin (2006-2010)

A very important indicator in the analysis of the country's annual foreign currency influx (revenues) from tourism are also the overnight stays of both domestic and foreign tourists by countries of origin. To see the trend of overnight stays of tourists by countries of origin in our country, we will use the data given in Table 2.

Table 2: Overnight stays of tourists, by country of origin: period 2006-2010 in the Republic of Macedonia)

Ord. No.		2006	2007	2008	2009	2010
1	Domestic	1.474.550	1.501.624	1.648.073	1.517.810	1.461.185
2	Foreign	442.845	518.088	587.447	583.796	559.032
3	Total	1.917.395	2.019.712	2.235.520	2.101.606	2.020.217

Source of data: Statistical Yearbook of the Republic of Macedonia, 14.02. Tourism, 2011.

Based on the data given in Table 2, we can conclude that in the period 2006-2010, the greatest number foreign tourists in the Republic of Macedonia in 2008 realized a total of 2,235,520 overnight stays, while in the period 2008-2010 the number of overnight stays by foreign tourists slightly declined, i.e. this number in 2010 decreased falling to 2,020,217. We do not have an in-depth analyses of the reasons for this decline in the number of foreign tourists, but this trend certainly deserves another aspect of analysis.

Regarding the number of overnight stays by domestic tourists, the highest level was reached in 2008 amounting to 353,363. From 2008-2010 there was a slight decrease in the number of overnight stays by domestic tourists. The number of

overnight stays by foreign tourists was the highest in 2008 reaching 587,447. The increase in the number of overnight stays of foreign tourists is due to the joint appearance of tour operators at tourist fairs, better advertising, better presentation of accommodation facilities through their own web pages, improvement of air and road transport and, of course, favourable arrangements.

Regarding the number of overnight stays of tourists by countries, according to the data given in the table, we can conclude that in 2006 the largest number of overnight stays by foreign tourists in the Republic of Macedonia was recorded by tourists from: Greece 66,417, Bulgaria 34,184 and Albania 32,214. In 2008, there was a change of places so the largest number of overnight stays was recorded with tourists from Serbia, 99,985, followed by Albania 48,085, Bulgaria 42,246 and Greece 38,918, etc. In the period 2008-2010, the number of overnight stays of guests from Serbia, Albania and Bulgaria had a slight decrease, while an increase was noted only with tourists from the Republic of Greece.

According to the data from the table by continents, we can see that in 2006 the highest number of tourist overnight stays was recorded by tourists from the USA 21,510, Australia 4,742 and Japan and Asian countries with 2,382 overnight stays, while in 2010 the number of nights spent by tourists from the United States decreased to 21,456. The highest number of overnight stays by tourists from the United States was in 2008 when it amounted to 22,964, while the number of overnight stays in 2010 of tourists from Australia and Japan increased to 8,523 and 2,905 respectively.

On the basis of the analysis, we can conclude that the highest number of foreign tourists come from Serbia, Albania, Greece, Turkey and Bulgaria. It is not difficult to conclude that this is primarily due to the country's closeness with the neighboring countries, as well as the historical connections between them, good road, rail and air connections, favourable arrangements and good tourist offer, and, of course, the subsidies introduced by the state for travel agencies (TA) for each foreign tourist who stays in our country.

3. Review of foreign tourists by countries of origin in the period 2011-2015

Thus, for example, from the data given in Table 2 for the arrival of foreign and domestic tourists (together), we can conclude that their number had been continuously increasing, and by types of places we can conclude that with the exception of mountain resorts, in all other places it also grew continuously.

Table 3. Tourist overnight stays, by country of origin (2011-2015)

Also, from the data given in Table 2 it can be concluded that the number of tourists in the capital city Skopje in the period 2011-2015 had been steadily increasing due to the significance of the capital as an administrative center, the presence of a large number of diplomatic missions, the concentration of large companies, the rich historical treasury, the cultural tradition and other comparative advantages.

Spa tourism had seen slight increase, while mountain tourism declined slightly. The number of tourists in other tourist resorts (lakes) increased.

Table 4. Tourist arrivals and touristovernight stays by domestic tourists, by types of resort (2011-2015)

Year	2011	2012	2013	2014	2015
Skopje	15 979	18 195	19 596	20 280	22 782
Spas	23 401	23 826	24 380	25 534	25 533
Mointain resorts	58 100	55 076	52 615	47 975	44 502
Other tourist destination	175 612	167 047	161 087	169 217	188 004
Other places	47 005	48 130	44 436	47 330	49 716
Total	320.097	312.274	302.114	310.336	330.537

Table 5. Tourist overnight stays (total) (2011-2015)

Year	2011	2012	2013	2014	2015
Skopje	254.553	269.813	288.682	310.802	378.253
Spas	220.64	216.516	222.362	224.374	215.541
Mointain resorts	129.937	110.865	105.301	95.877	97.831
Other tourist destination	994.4	936.386	877.076	872.259	952.985
Other places	75.823	72.725	68.684	74.416	76.284
Total	2.173.034	2.151.692	2.157.175	2.195.883	2.394.205

From the data presented in Table 4 we can conclude that the arrivals and overnight stays of tourists grew steadily. The most striking increase in arrivals and overnight stays of tourists was in the capital city, Skopje, the second place is taken by other tourist destinations, and the third by other places.

From the data given in Table 5, we can notice that the number of overnight stays of tourists in the period 2011-2015 steadily grew reaching a total of 2,394,205 in 2015. Tables 5 and 6 show overnight stays of domestic and foreign tourists respectively.

Table 6. Overnight stays of domestic tourist (total)

	2011	2012	2013	2014	2015
Skopje	24.434	29.221	29.074	31.659	37.972
Spas	193.274	190.749	195.665	199.159	192.75
Mountain resorts	129.937	110.865	105.301	95.877	97.831
Other tourist destinations	994.4	936.386	877.076	872.259	952.985
Other places	75.823	72.725	68.684	74.416	76.284
Total	1.417.868	1.339.946	1.275.800	1.273.370	1.357.822

As for the stay of the domestic tourists, from the above table it can be concluded that the figure fluctuated. Most overnight stays were in 2011 with over 1,417,868, then the number gradually declined, and it increased again to 1,357,822 overnight stays.

Table 7. Tourist night stays (foreign tourist-total)

	2011	2012	2013	2014	2015
Skopje	230.119	240.592	259.608	279.143	340.281
Spas	27.366	25.767	26.697	25.215	22.791
Mountain resorts	31.445	33.428	38.824	39.641	38.605
Other tourist destinations	314.784	350.991	382.514	396.417	454.259
Other places	151.452	160.968	173.732	182.097	180.447
Total	755.166	811.746	881.375	922.513	1036.38

Based on the data given in Table 7 for overnight stays of foreign tourists, we can notice that it grew steadily in 2015 when it reached 1,036,383 overnight stays. From this table also we can see that the overnight stays of foreign tourists in Skopje steadily increased and in 2015 it reached 340,281. The number of overnight stays increased in the mountain resorts and other tourist resorts.

Table 8. Tourist arrivals, by types of accommodation facilities (2011-2015)

Ord. No.	2011	2012	2013	2014	2015
1. Hotels* ***	139.674	154.875	176.365	192.281	245.102
2. Spas	27.142	27.169	27.888	28.976	28.853
3. Houses, holiday homes and rooms	115.736	104.537	99.951	103.592	111.168

From the analysis of the number of foreign tourists according to the type of accommodation facilities, we found that by types of business units, tourists mostly stayed in hotels with 4 stars, followed by holiday homes, apartments and rooms, and spas in the third place.

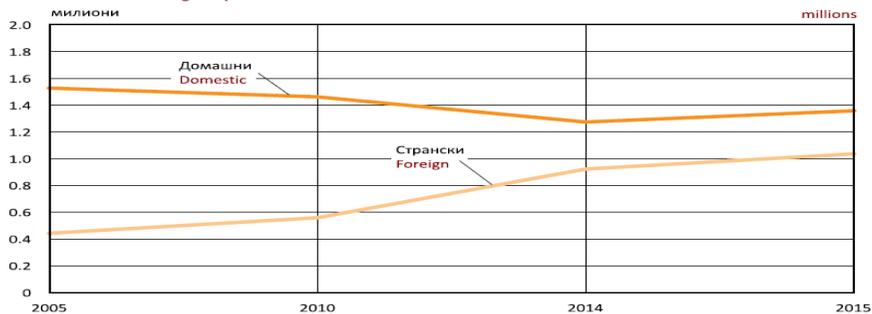
Table 9. Overnight stays of tourists, by country of origin: period 2011-2015 in the RM

Ord. No.		2011	2012	2013	2014	2015
1	Domestic	1.417.868	1.339.946	1.275.800	1.273.370	1.357.822
2	Foreign	755.166	811.746	881.375	922.513	1.036.383
3	Total	2.173.034	2.151.692	2.157.175	2.195.883	2.394.205

Source: Statistical Yearbook of the Republic of Macedonia, Tourism, 2011-2015. Statistical overview 8.4.16.01/847

The results shown in all the above tables for the realized overnight stays of domestic and foreign tourists in the period 2006-2015 can be presented with the following chart:

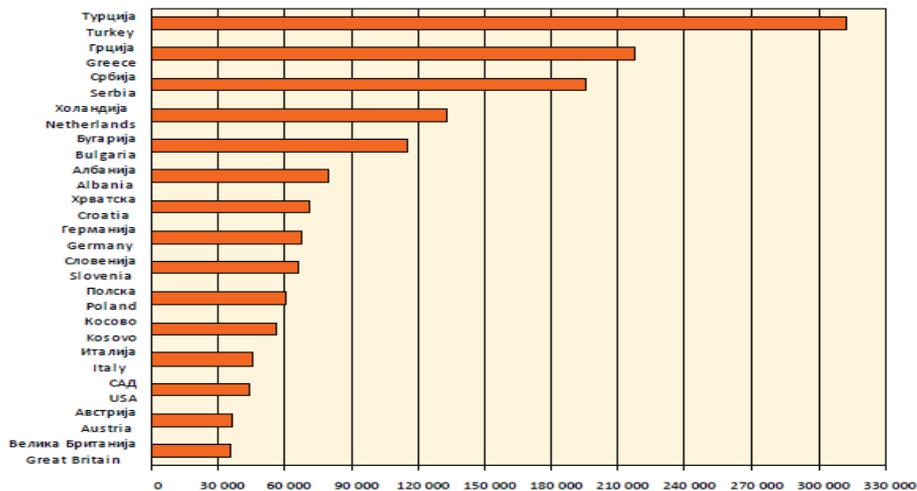
Г-14.02.1: Остварени ноќевања
G-14.02.1: Number of nights spent



Source: State Statistical Office, Statistical Yearbook of the Republic of Macedonia 2016, Report on Transport, Tourism and Other Services.

The movement of the number of tourists according to the country of origin in the period 2011-2015 can also be shown by the graph below.

Г-06: Доаѓања на туристи според земјата на припадност, вкупно 2011-2015
G-06: Tourist arrivals by country of origin, total 2011-2015



Source: State Statistical Office, Statistical Yearbook of the Republic of Macedonia 2016, Report on Transport, Tourism and Other Services.

Based on the data shown in the above chart for arrival of tourists according to the country of origin in the period 2011-2015, we can conclude that tourists from Turkey are in the first place with more than 300,000 tourists, the second place is taken by Greece with over 210,000 tourists, tourists from Serbia are in the third place reaching 200,000, the fourth is the Netherlands with over 130,000 tourists, Bulgaria is the fifth with about 115,000 tourists, etc.

Resume

Based on the data we presented in the tables above on the number of visitors (tourists) by country and the realized overnight stays of tourists by countries in the period 2006-2010 and 2011-2015, we can conclude the following:

The number of domestic and foreign tourists in the Republic of Macedonia grew steadily, and thus so did the number of overnight stays.

Tourists by countries of origin who visited the R. Macedonia in the period 2006-2010:

In the period 2006-2010, out of the total number of domestic and foreign tourists who visited our country, the highest number was in 2008, 2,235,520.

In the period 2006-2010, the highest number of domestic tourists in our country was reached in 2008 - 1.648.073.

The largest number of foreign tourists in our country in the period 2006-2010 was in 2008 - 587.447.

By country, the largest number of foreign tourists in the period 2006-2010 was in 2008 from: Serbia 45,134 and Bulgaria 21,922.

By continents, the largest number of the tourists who visited our country in the period 2006-2010 was in 2008 from the USA, in 2010 from the USA 21,456 and from Australia 8,523.

2. Overnight stays of tourists by countries of origin who stayed in our country in the period 2006-2010.

In the period 2006-2010, the highest number of domestic and foreign overnight stays was in the year 2010 - 2,235,520.

In the period 2006-2010, the highest number of domestic overnight stays in our country was in 2008 - 1.648.073.

The largest number of foreign overnight stays in our country in the period 2006-2010 was in 2008 - 587.447.

By country, the highest number of foreign overnightstays in the period 2006-2010 was recorded in our country in 2008 from: Serbia 99,985, Albania 48,086 and Bulgaria 42,246 tourists.

By continents, most of the tourists in the period 2006-2010 who visited our country in 2008 were from the USA - 22,964 and in 2010 from the USA 21,456 and from Australia 8,523. The increased number of tourists from the United States and Australia is due to our economic migrants who settled on these continents in the seventies and eighties of the XX century.

According to the data on overnight stays of foreign tourists in our country, we see from the graph that from the analyzed 18 countries, the top five places are taken by: Serbia, Albania, Greece, Turkey and Bulgaria.

When making a development strategy for tourism in our country it is inevitable to make an analysis for each tourist season and year of both domestic and tourists by countries of origin who visited our country and realized overnight stays. Of course, this is of utmost importance, assisted by the state, for achieving as much financial income as possible for all entities that participate in the realization of tourism in our country.

3. Tourists by countries of origin who visited our country in the period 2011-2015

In the period 2011-2015, out of the total number of domestic and foreign tourists who visited our country the greatest number was in 2015 - 816.067.

In the period 2011-2015, the largest number of domestic tourists in our country was in 2015 with 330,537 tourists.

The largest number of foreign tourists in our country in the period 2011-2015 was in 2015 - 485 530.

By country, the largest number of foreign tourists in the period 2011-2015 who visited our country was from: Turkey 315,000, Greece 220,000, Serbia, around 200,000, the Netherlands 130,000 tourists, and Bulgaria 115,000 tourists.

By continents, the largest number of tourists in the period 2011-2015 was in 2015, coming from the United States with over 10,186 visitors, and also in 2015 from Australia with 6,625, which in relation to the period 2006-2010 is a decrease.

4. Overnight stays of tourists by countries of origin who stayed in RM (2011-2015)

In the period 2011-2015, the highest number of domestic and foreign overnight stays was in 2015 - 2.394.205.

In the period 2011-2015, the highest number of domestic overnight stays in our country was in 2011 - 1,417 868.

The largest number of foreign overnight stays in our country in the period 2011-2015 was in 2015 - 1,036 383.

By countries, the largest number of foreign overnight stays in the period 2011-2015 was recorded in our country in 2015 by tourists from: Holland 169,413, Turkey in 2015 with 135,255, Serbia in 2015 with 85,042 overnight stays, Greece in 2013 with 80,650, Bulgaria with 52,748 overnight stays in 2015.

By continents, the largest number of tourists in 2011-2015 in our country was in 2015 from the United States with 23,046 overnight stays, and Australia with 15,650 overnight stays in 2015. The increased visit of tourists from the United States and Australia is due to our economic migrants who settled on these continents in the seventies and eighties of the XX century, and from the beginning of the XXI century.

Based on the above data on the overnight stays of foreign tourists in the Republic of Macedonia, from the table and the graph we can notice that of all the analyzed countries, the top five places are taken by: The Netherlands, Turkey, Greece, Serbia, Albania and Bulgaria. The neighboring countries are predominant, which is understandable, given the economic and cultural links of these countries. However, the neighboring countries in terms of overnight stays are overtaking the Netherlands and Turkey. Nevertheless, The Netherlands and Turkey have more realized overnight stays than the neighboring countries.

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