

# TOURISM





## Definition

The indicator shows:

### 1.1 International tourist intensity

The indicator shows the total number of foreign tourists by years at country level and by statistical regions and structure of visitors by country of origin.

### 1.2 Overnights of foreign tourists

The indicator shows the total number of overnights of foreign tourists by years at country level and by statistical regions. Also, it shows the structure of overnights and average stay of tourists by country of origin.

### 1.3 National tourists intensity

The indicator shows the total number of overnights of national tourists by years at country level and by statistical regions and average stay of tourists.

## Units

- Number, intensity and structure.

## Policy relevance

### List of relevant policy documents

National Strategy for Tourism Development 2009 - 2013

- National Environmental Action Plan - 2 - in Section 4.2.6. Tourism, describes the main challenge for sustainable tourism development, implementation of economic potential with minimum possible impact on the environment.
- Spatial Plan of the Republic of Macedonia – in its Chapter 5.4. «Tourism development and organization of tourist areas», defines the status, objectives and planning determinations for tourism development.
- National Strategy for Sustainable Development of the Republic of Macedonia – in the section on tourism, presents the directions for sustainable development of tourism, within short, medium, and long-term frames, up to 2030.
- Strategy for Biological Diversity Protection in the Republic of Macedonia with Action Plan – under measure C.5 «Stimulation of traditional use of biological diversity and eco-tourism», defines the action for identification of sites suitable for eco-tourism.

## Legal grounds

The Law on Tourist Activity specifies the conditions and the manner of performing tourist activity (Chapter 15 Services in rural, ethno and eco-tourism), Law on

## Catering Activity.

The Law on Environment, the Law on Nature Protection, the Law on Waste Management, the Law on Ambient Air Quality and the Law on Waters regulate partially the requirements for environmental protection in tourist activity.

## Targets

- Integration of the principles of sustainable development and environmental considerations in tourist sector
- Identification of areas of priority importance for tourism development
- Encouragement of exchange of best practices between public and private tourist interests
- Protection of natural heritage and biological diversity in tourist destinations
- Adoption and implementation of legislation in the area of tourism to regulate the protection of the environment
- Promotion of organic farming, healthy food production and especially traditional production of certain products (e.g. cheese, wine), production of honey, herbs growing, etc.
- Promotion of certain types of tourism such as wine tourism, hunting tourism, birds observation tourism, etc.

## Key policy issue

### 1. What is the impact of tourism on the environment?

Tourism is a development factor with regard to phenomena and interactions in the environment, both in economic and non-economic activities. Tourism is not a product of natural and anthropogenic impact of environmental elements, but it is a significant transformer of the environment. The impacts of tourism on the environment may be systematized in all domains of tourist industry. In the domain of emitting environment, tourism appears as environment transformer in a form of numerous billboards, illuminated advertisements, and shop windows. In the communication domain, transportation means for tourist purposes are employed, such as railways, cable railways, abandoned trains and cars, even trunks, advertisements on by-road billboards and transportation means. New properties are introduced in the attractive-reception environment. Mountains obtain skiing terrains and view platforms, hunting is related to drinking and feeding places and observatories, shores contain wellarranged beaches, parter and horticultural substances, interior and

exterior developments are present, rural areas are adapted to receive tourists, the space is planned for infrastructure and communal services, and commercial network undergoes evolution and turns into tourist merchandise profile through sales of souvenirs and articles for tourist activities.

## **2. Does the increased number of tourists make enhanced pressure on the environment?**

Increased number of tourists should not by itself imply enhanced pressure on the environment. Such pressure occurs in conditions of weak organization. In such conditions, the increased number of tourists may cause confrontations and misunderstandings among stakeholders involved in tourist industry, insufficient observation of traffic regulations, lack of care for public hygiene, non-observation of the code of conduct in tourist resort, robberies and destruction of nature and artifacts and sociofacts, criminogene conduct in terms of dealings with drugs, alcohol, prostitution, violations and other types of crime.

Development of tourism and increased number of tourists are accompanied by building activities that are not in accordance with the regulations and in harmony

with authentic features of natural values.

## **Key message**

With regard to international tourist intensity, total number of foreign tourists has had a trend of increase from 2002 to 2011 by 162%, and Greece with 311.759 tourists has had significant share in the number of foreign tourists. In terms of statistical regions, the highest number of tourists visited Skopje and Southwestern regions.

The total number of overnights by foreign tourists from 2002 to 2011 has had a rising trend by 175%. The highest average number of overnights was realized by tourists from Luxemburg with 3.89 days of average stay. In terms of statistical regions, the highest number of overnights were accomplished in Skopje and Southwestern regions.

With regard to national tourist intensity, it can be noted that the number of tourists from 2002 to 2011 has noted insignificant trend of increase. The number of overnights has been varying from year to year, though with falling trend. The average stay of national tourists for the same period has noted falling trend from 5 to

around 4 days of average stay.

Considering the fact that tourism is organized activity, monitoring of these indicators is necessary and so are the actions of all stakeholders for the purpose of environment protection and improvement through timely interventions and planned activities.

### 1.1 International tourist intensity

Figure 1. Total number of foreign tourists

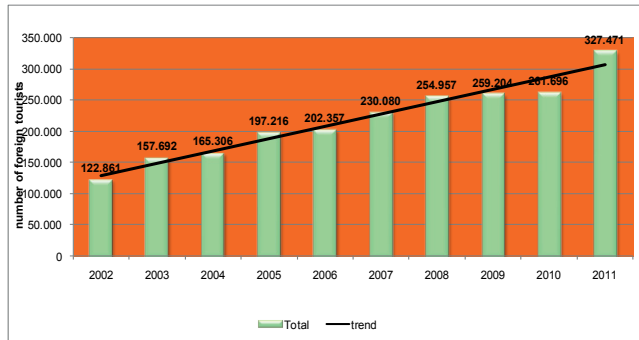


Figure 2. Total number of foreign tourists by country of origin in the reporting period

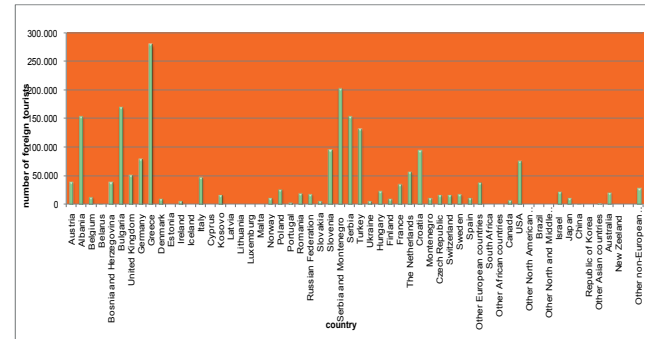


Figure 3. Countries with significant share in the number of foreign tourists

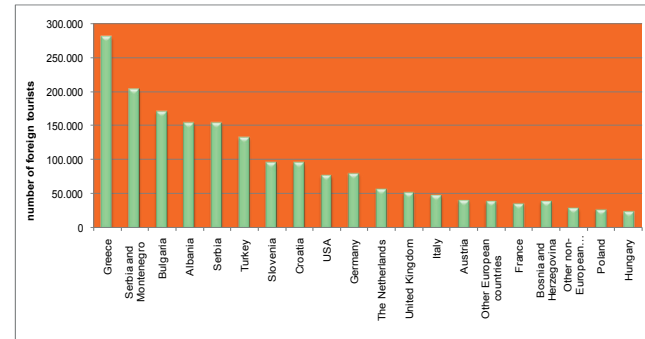
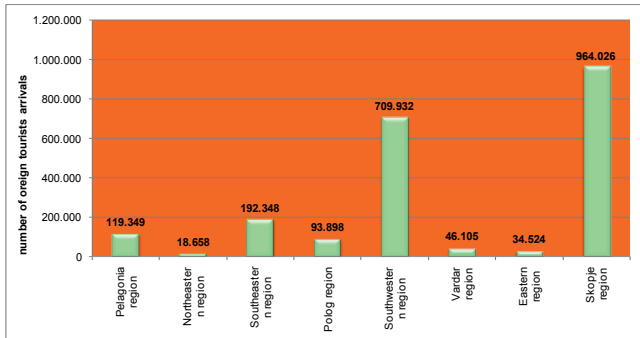


Figure 4. Foreign tourists arrivals by statistical regions



## 1.2 Overnights of foreign tourists

Figure 5. Total number of overnights by foreign tourists

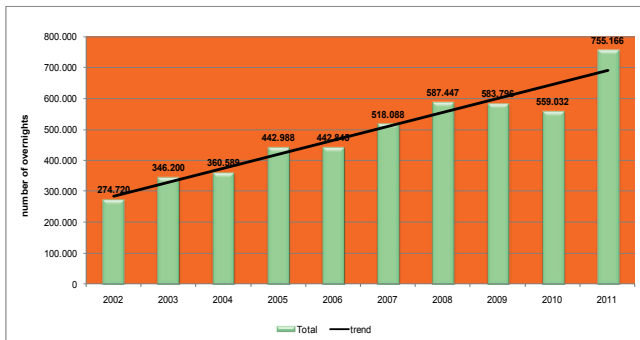


Figure 6. Total number of overnights and average stay by foreign tourists by country of origin

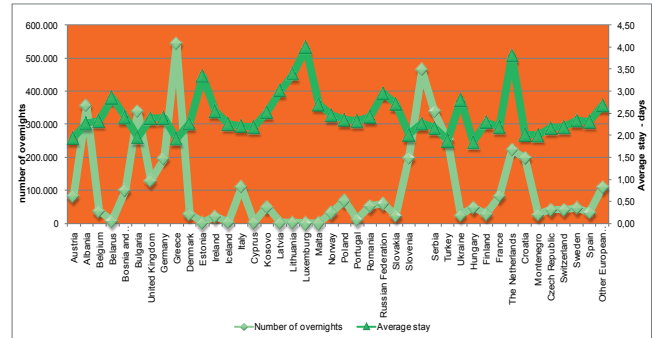


Figure 7. Countries with significant share in the average stay of foreign tourists

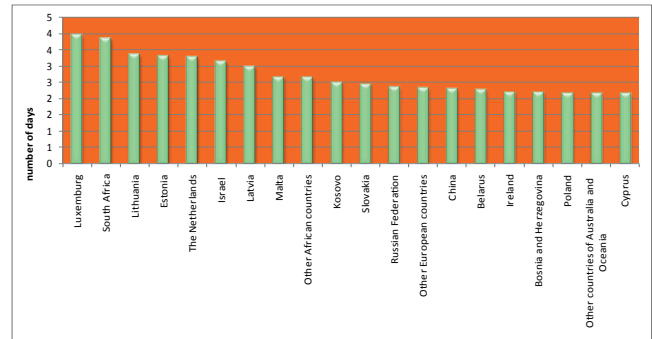


Figure 8. Overnights by foreign tourists by statistical regions

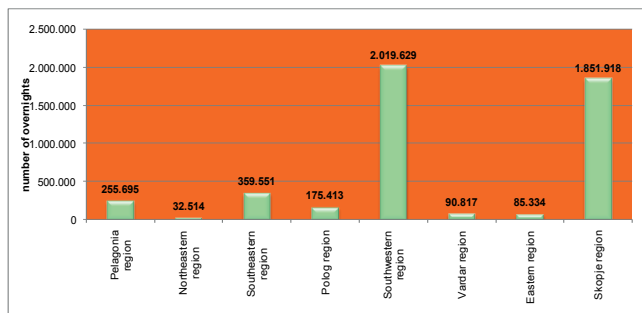
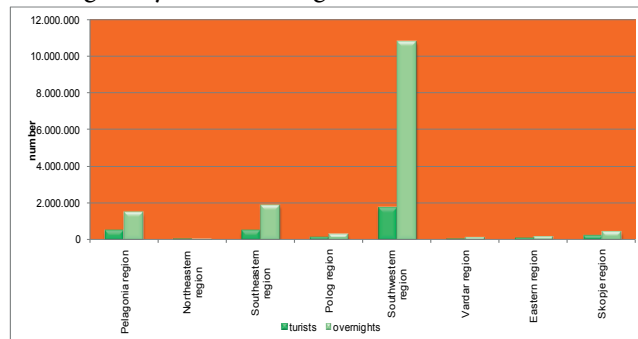
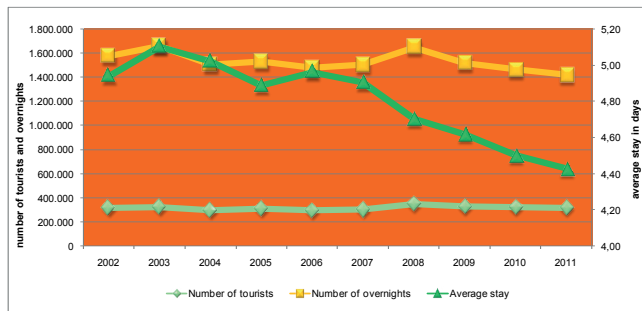


Figure 10. Number of national tourists and number of overnights by statistical regions



### 1.3 National tourist intensity

Figure 9. Total number of national tourists, number of overnights and average stay



## Assessment

### 1.1 International tourist intensity

Data presented in Figures show that the Republic of Macedonia has been visited by tourists from many countries in the world. Tourists from Europe, North America, Asia and Australia dominate. During the ten year reporting period, the structure of visits is dominated by tourists from the immediate neighbourhood. The leading position is occupied by tourists from Greece, Serbia and Montenegro, followed by Bulgaria and Albania, while the most numerous tourists from among other continents come from United States of

America. Development of attractive and receptive base in the Republic of Macedonia should provide greater presence of tourists from Western European countries with longer tourism tradition, and thus higher tourism and culture level.

Regional distribution shows that leading regional centres are Skopje and Southwestern regions, indicating two differentiated regions with different characteristics. Namely, the Southwestern region is predominated by the attractiveness of the resources, while Skopje region offers possibilities for business activities. Other regions incorporate alternative opportunities based on different environments, and therefore it is important to monitor the scale of foreign tourist intensity for the purpose of redistribution of visits.

## 1.2 Overnights of foreign tourists

The overnights correspond with the intensity of foreign tourists in the Republic of Macedonia. The summary results lead to the conclusion that the highest number of overnights was realized by tourists from European countries, with Luxemburg as a country of highest share in the average stay of tourists which is 3.98 days. From among other continents, the longest average stay was recorded for tourists from South Africa. Observation

of this trend can help us assess the rate at which the attractiveness of the environment has adapted to the demands of these visitors.

Regional distribution of overnights by foreign tourists indicates that tourists in the Southwestern region accomplished highest number of overnights, followed by Skopje region, which is an unfavourable circumstance in the context of foreign tourism intensity, because they relate to visitors in mainly urban environment. Observation of the relations in the regional distribution of overnights accomplished by foreign tourists will enable the assessment of measures undertaken to redistribute overnights to other regions with specific values.

The average stay of foreign tourists enables us to observe the level of domination of environmental characteristics. The Figure indicates that the length of stay of foreign tourists in the Republic of Macedonia is relatively short. Such length was around 1.95 days in the analyzed period, reflecting significant lagging behind relative to the average length of stay of national tourists.



### 1.3 National tourism intensity

The number of national tourists has stagnation characteristics. Namely, during the period 2002 to 2011, there was insignificant trend of increase, and in 2006 the number of tourists decreased. This means that no significant improvement in the offer was made. The overnights acquired by national tourists track similar characteristics. Highest number of overnights was recorded in 2006, followed by falling trend by 2011. The results of average length of stay reflect similar relations, with significant drop in the number of overnights from 2007 to 2011. The lowest number of overnights was recorded in 2011, while the average length of stay from 2002 to 2011 recorded drop from 5 to around 4 days.

Dominant region in the context of distribution of national tourists is the Southwestern region, which could be assessed as advantage, but also as unbalanced distribution. Observation of these indicators should facilitate the estimate of the extent to which the number of national tourists will increase in other regions as a result from the promotion of the elements of the

environment in tourist supply at the national tourist market.

The number of overnights is also comparable to tourist visits as reflection of the attractiveness of the environment, and thus the highest number of overnights has been recorded in Southwestern region. Observation of overnights will enable to assess the extent to which regions will improve the attractive basis as a factor of acquiring higher number of overnights.

### Methodology

#### ■ Methodology for the indicator calculation

The trend in tourism development through dynamics and intensity of tourist industry.

The scale and the intensity, as well as the share of individual countries in the total number of foreign tourists arrivals and overnights, national tourists arrivals and overnights, regional distribution and average number of days of stay.

## Data specification

| Title of the indicator  | Source                     | Reporting obligation   |
|---|----------------------------|--|
| Tourism intensity in the Republic of Macedonia<br>1.1 International tourism intensity<br>1.2 Overnights of foreign tourists<br>1.3 National tourism intensity | – State Statistical Office | <ul style="list-style-type: none"> <li>– Yearly to EUROSTAT</li> <li>– World Tourist Organization (WTO)</li> <li>– Annual tourist review of tourism and other services</li> <li>– Five-year interview of foreign tourists in accommodation establishments</li> </ul> |

### Data coverage:

#### 1.1 International tourism intensity

Table 1: Foreign tourists arrivals by country of origin

|                        | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | Total     |
|------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| Total                  | 122.861 | 157.692 | 165.306 | 197.216 | 202.357 | 230.080 | 254.957 | 259.204 | 261.696 | 327.471 | 2.178.840 |
| Austria                | 1.919   | 2.564   | 2.503   | 2.736   | 3.490   | 5.186   | 5.315   | 6.437   | 6.143   | 5.681   | 41.974    |
| Albania                | 9.086   | 12.088  | 13.452  | 16.868  | 16.188  | 17.573  | 19.314  | 19.757  | 17.110  | 13.614  | 155.050   |
| Belgium                | 970     | 1.243   | 996     | 1.157   | 1.414   | 1.748   | 1.711   | 1.839   | 1.848   | 2.519   | 15.445    |
| Belarus                | 154     | 157     | 197     | 188     | 127     | 114     | 253     | 178     | 101     | 1.151   | 2.620     |
| Bosnia and Herzegovina | 1.885   | 2.687   | 3.648   | 4.021   | 4.240   | 4.887   | 4.443   | 4.672   | 5.619   | 4.959   | 41.061    |
| Bulgaria               | 11.703  | 14.147  | 12.156  | 17.462  | 17.421  | 18.901  | 21.922  | 23.619  | 15.513  | 18.541  | 171.385   |
| United Kingdom         | 3.916   | 4.517   | 4.049   | 5.099   | 5.318   | 5.789   | 7.690   | 5.309   | 5.647   | 6.139   | 53.473    |
| Germany                | 6.084   | 6.317   | 6.522   | 6.995   | 7.659   | 8.840   | 9.655   | 9.795   | 9.573   | 9.822   | 81.262    |
| Greece                 | 14.677  | 27.042  | 29.901  | 33.080  | 30.835  | 28.618  | 21.060  | 22.253  | 26.843  | 45.509  | 279.818   |

|                       | 2002   | 2003   | 2004   | 2005   | 2006   | 2007   | 2008   | 2009   | 2010   | 2011   | Total   |
|-----------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|
| Denmark               | 786    | 1.048  | 1.379  | 1.165  | 1.018  | 1.168  | 1.748  | 1.338  | 1.273  | 1.251  | 12.174  |
| Estonia               |        |        |        |        |        |        |        |        | 176    | 260    | 436     |
| Ireland               | 525    | 482    | 522    | 659    | 991    | 1.011  | 792    | 610    | 745    | 1.500  | 7.837   |
| Iceland               | 153    | 159    | 118    | 125    | 137    | 115    | 230    | 161    | 164    | 137    | 1.499   |
| Italy                 | 3.076  | 3.626  | 3.618  | 4.259  | 4.651  | 5.123  | 5.674  | 6.050  | 6.181  | 7.140  | 49.398  |
| Cyprus                |        |        |        |        |        |        |        |        | 194    | 675    | 869     |
| Kosovo                |        |        |        |        |        |        |        |        | 9.480  | 9.829  | 19.309  |
| Latvia                |        |        |        |        |        |        |        |        | 239    | 308    | 547     |
| Lithuania             |        |        |        |        |        |        |        |        | 251    | 280    | 531     |
| Luxemburg             |        |        |        |        |        |        |        |        | 53     | 107    | 160     |
| Malta                 |        |        |        |        |        |        |        |        | 23     | 60     | 83      |
| Norway                | 1.059  | 1.108  | 962    | 1.051  | 1.277  | 1.263  | 1.920  | 1.618  | 1.503  | 1.212  | 12.973  |
| Poland                | 1.095  | 1.029  | 1.233  | 1.254  | 1.332  | 1.728  | 2.434  | 5.827  | 6.182  | 6.758  | 28.872  |
| Portugal              | 308    | 432    | 331    | 365    | 511    | 611    | 552    | 601    | 655    | 727    | 5.093   |
| Romania               | 1.255  | 1.330  | 1.144  | 1.733  | 1.662  | 2.137  | 2.240  | 2.677  | 3.351  | 3.882  | 21.411  |
| Russian Federation    | 1.246  | 1.352  | 1.487  | 2.092  | 1.998  | 1.523  | 2.091  | 1.872  | 2.848  | 3.545  | 20.054  |
| Slovakia              | 481    | 559    | 554    | 554    | 636    | 1.496  | 811    | 1.140  | 1.082  | 1.099  | 8.412   |
| Slovenia              | 3.837  | 4.579  | 5.444  | 7.514  | 9.228  | 13.046 | 13.159 | 13.970 | 12.606 | 14.063 | 97.446  |
| Serbia and Montenegro | 23.239 | 27.325 | 30.771 | 39.147 | 38.208 | 44.661 |        |        |        |        | 203.351 |
| Serbia                |        |        |        |        |        |        | 45.134 | 38.744 | 35.840 | 35.692 | 155.410 |
| Turkey                | 5.180  | 5.755  | 6.496  | 7.379  | 7.804  | 8.907  | 15.561 | 16.962 | 20.047 | 39.251 | 133.342 |
| Ukraine               | 908    | 706    | 724    | 617    | 641    | 1.079  | 1.072  | 772    | 981    | 1.042  | 8.542   |

|   | 2002  | 2003  | 2004  | 2005  | 2006  | 2007   | 2008   | 2009   | 2010   | 2011   | Total  |
|---|-------|-------|-------|-------|-------|--------|--------|--------|--------|--------|--------|
| Hungary                                   | 1.985 | 2.173 | 1.320 | 1.582 | 1.835 | 3.037  | 3.254  | 3.365  | 3.492  | 3.342  | 25.385 |
| Finland                                   | 683   | 768   | 782   | 835   | 885   | 1.018  | 1.088  | 1.220  | 1.233  | 3.432  | 11.944 |
| France                                    | 2.542 | 3.513 | 2.845 | 3.017 | 3.133 | 3.594  | 4.278  | 4.914  | 4.858  | 4.901  | 37.595 |
| The Netherlands                           | 2.016 | 2.470 | 2.652 | 4.218 | 3.809 | 3.705  | 5.606  | 4.988  | 6.612  | 22.219 | 58.295 |
| Croatia                                   | 4.097 | 5.467 | 6.828 | 7.667 | 8.817 | 12.326 | 12.302 | 12.519 | 12.791 | 13.885 | 96.699 |
| Montenegro                                |       |       |       |       |       |        | 2.761  | 2.653  | 4.180  | 3.522  | 13.116 |
| Czech Republic                            | 927   | 1.155 | 905   | 1.290 | 2.108 | 1.990  | 2.406  | 2.583  | 2.423  | 2.695  | 18.482 |
| Switzerland                               | 965   | 1.485 | 1.598 | 1.845 | 1.924 | 1.939  | 2.048  | 1.848  | 2.153  | 2.733  | 18.538 |
| Sweden                                    | 1.082 | 1.503 | 1.596 | 1.854 | 1.937 | 1.845  | 2.311  | 2.355  | 2.530  | 2.702  | 19.715 |
| Spain                                     | 842   | 1.386 | 895   | 1.213 | 1.154 | 1.464  | 1.710  | 2.091  | 1.711  | 1.726  | 14.192 |
| Other European countries                  | 1.767 | 2.689 | 2.911 | 2.286 | 2.961 | 4.114  | 7.045  | 9.486  | 4.274  | 2.947  | 40.480 |
| South Africa                              |       |       |       |       |       |        |        |        | 32     | 52     | 84     |
| Other African countries                   |       |       |       |       |       |        |        |        | 196    | 356    | 552    |
| Canada                                    | 776   | 970   | 704   | 851   | 906   | 969    | 1.160  | 1.257  | 1.247  | 1.366  | 10.206 |
| USA                                       | 6.997 | 7.403 | 7.658 | 7.588 | 8.275 | 7.978  | 8.472  | 7.826  | 7.655  | 8.082  | 77.934 |
| Other North American countries            |       |       |       |       |       |        |        |        | 451    | 636    | 1.087  |
| Brazil                                    |       |       |       |       |       |        |        |        | 142    | 252    | 394    |
| Other North and Middle American countries |       |       |       |       |       |        |        |        | 229    | 408    | 637    |
| Israel                                    | 430   | 526   | 676   | 1.207 | 1.170 | 1.809  | 6.532  | 6.110  | 2.885  | 3.309  | 24.654 |
| Japan                                     | 594   | 1.076 | 931   | 1.041 | 1.212 | 1.861  | 1.236  | 1.268  | 1.621  | 2.194  | 13.034 |
| China                                     |       |       |       |       |       |        |        |        | 853    | 1.664  | 2.517  |
| Republic of Korea                         |       |       |       |       |       |        |        |        | 686    | 1.070  | 1.756  |

|  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | Total  |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------|
| Other Asian countries                    |       |       |       |       |       |       |       |       | 2.015 | 2.755 | 4.770  |
| Australia                                | 844   | 1.187 | 1.116 | 1.563 | 2.014 | 2.755 | 3.165 | 2.784 | 3.967 | 3.974 | 23.369 |
| New Zealand                              | 128   | 99    | 96    | 143   | 264   | 183   | 273   | 203   | 207   | 253   | 1.849  |
| Other countries of Australia and Oceania |       |       |       |       |       |       |       |       | 982   | 243   | 1.225  |
| Other non-European countries             | 2.644 | 3.570 | 3.586 | 3.496 | 3.167 | 3.969 | 4.529 | 5.533 |       |       | 30.494 |

Table 2: Arrivals of foreign tourists by statistical regions

|                     | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | Total     |
|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| Total               | 122.861 | 157.692 | 165.306 | 197.216 | 202.357 | 202.357 | 202.357 | 202.357 | 261.696 | 327.471 | 2.178.840 |
| Pelagonia region    | 6.464   | 9.225   | 11.238  | 12.550  | 12.472  | 13.025  | 13.286  | 11.838  | 14.166  | 15.085  | 119.349   |
| Northeastern region | 1.325   | 985     | 1.739   | 2.011   | 1.580   | 2.366   | 2.099   | 2.124   | 2.005   | 2.424   | 18.658    |
| Southeastern region | 5.006   | 7.792   | 9.559   | 16.518  | 12.696  | 21.399  | 21.139  | 22.582  | 25.453  | 50.204  | 192.348   |
| Polog region        | 5.013   | 4.898   | 7.529   | 8.506   | 9.185   | 8.014   | 9.222   | 14.096  | 14.478  | 12.957  | 93.898    |
| Southwestern region | 34.234  | 51.551  | 53.497  | 66.226  | 72.258  | 80.003  | 83.007  | 87.353  | 79.934  | 101.869 | 709.932   |
| Vardar region       | 3.624   | 3.323   | 3.208   | 3.332   | 3.894   | 3.795   | 4.599   | 5.385   | 6.406   | 8.539   | 46.105    |
| Eastern region      | 1.714   | 1.995   | 2.330   | 2.302   | 3.079   | 3.792   | 4.509   | 4.545   | 4.591   | 5.667   | 34.524    |
| Skopje region       | 65.481  | 77.923  | 76.206  | 85.771  | 87.193  | 97.686  | 117.096 | 111.281 | 114.663 | 130.726 | 964.026   |

## 1.2 Overnights of foreign tourists

Table 3: Overnights and average stay of foreign tourists by country of origin

|                        | Number of tourists | Number of overnights | Average stay |
|------------------------|--------------------|----------------------|--------------|
| Total                  | 2.178.840          | 4.870.871            | 2,24         |
| Austria                | 41.974             | 81.854               | 1,95         |
| Albania                | 155.050            | 352.691              | 2,27         |
| Belgium                | 15.445             | 35.985               | 2,33         |
| Belarus                | 2.620              | 7.466                | 2,85         |
| Bosnia and Herzegovina | 41.061             | 98.984               | 2,41         |
| Bulgaria               | 171.385            | 335.707              | 1,96         |
| United Kingdom         | 53.473             | 127.671              | 2,39         |
| Germany                | 81.262             | 194.690              | 2,40         |
| Greece                 | 279.818            | 538.868              | 1,93         |
| Denmark                | 12.174             | 27.658               | 2,27         |
| Estonia                | 436                | 1.455                | 3,34         |
| Ireland                | 7.837              | 19.941               | 2,54         |
| Iceland                | 1.499              | 3.388                | 2,26         |
| Italy                  | 49.398             | 109.359              | 2,21         |

|                       | Number of tourists | Number of overnights | Average stay |
|-----------------------|--------------------|----------------------|--------------|
| Cyprus                | 869                | 1.903                | 2,19         |
| Kosovo                | 19.309             | 48.781               | 2,53         |
| Latvia                | 547                | 1.645                | 3,01         |
| Lithuania             | 531                | 1.794                | 3,38         |
| Luxemburg             | 160                | 637                  | 3,98         |
| Malta                 | 83                 | 224                  | 2,70         |
| Norway                | 12.973             | 31.823               | 2,45         |
| Poland                | 28.872             | 67.864               | 2,35         |
| Portugal              | 5.093              | 11.849               | 2,33         |
| Romania               | 21.411             | 51.759               | 2,42         |
| Russian Federation    | 20.054             | 59.153               | 2,95         |
| Slovakia              | 8.412              | 22.760               | 2,71         |
| Slovenia              | 97.446             | 196.102              | 2,01         |
| Serbia and Montenegro | 203.351            | 461.257              | 2,27         |
| Serbia                | 155.410            | 336.427              | 2,16         |
| Turkey                | 133.342            | 251.417              | 1,89         |
| Ukraine               | 8.542              | 23.908               | 2,80         |
| Hungary               | 25.385             | 46.973               | 1,85         |
| Finland               | 11.944             | 27.437               | 2,30         |
| France                | 37.595             | 82.326               | 2,19         |

|   | Number of tourists | Number of overnights | Average stay |
|---|--------------------|----------------------|--------------|
| The Netherlands                           | 58.295             | 220.966              | 3,79         |
| Croatia                                   | 96.699             | 195.832              | 2,03         |
| Montenegro                                | 13.116             | 26.323               | 2,01         |
| Czech Republic                            | 18.482             | 39.999               | 2,16         |
| Switzerland                               | 18.538             | 40.634               | 2,19         |
| Sweden                                    | 19.715             | 46.107               | 2,34         |
| Spain                                     | 14.192             | 32.783               | 2,31         |
| Other European countries                  | 40.480             | 108.293              | 2,68         |
| South Africa                              | 84                 | 325                  | 3,87         |
| Other African countries                   | 552                | 1483                 | 2,69         |
| Canada                                    | 10.206             | 23.945               | 2,35         |
| USA                                       | 77.934             | 209.546              | 2,69         |
| Other North American countries            | 1.087              | 2.311                | 2,13         |
| Brazil                                    | 394                | 812                  | 2,06         |
| Other North and Middle American countries | 637                | 1.393                | 2,19         |
| Israel                                    | 24.654             | 81.307               | 3,30         |
| Japan                                     | 13.034             | 23.773               | 1,82         |

|  | Number of tourists | Number of overnights | Average stay |
|--|--------------------|----------------------|--------------|
| China                                    | 2.517              | 5.869                | 2,33         |
| Republic of Korea                        | 1.756              | 2.127                | 1,21         |
| Other Asian countries                    | 4.770              | 9.685                | 2,03         |
| Australia                                | 23.369             | 51.928               | 2,22         |
| New Zealand                              | 1.849              | 3.255                | 1,76         |
| Other countries of Australia and Oceania | 1.225              | 2.705                | 2,21         |
| Other non-European countries             | 30.494             | 77.714               | 2,55         |

Table 4: Overnights by foreign tourists by statistical regions

|                     | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | Total     |
|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| TOTAL               | 274.720 | 346.200 | 360.589 | 442.988 | 442.845 | 518.088 | 587.447 | 583.796 | 559.032 | 755.166 | 4.870.871 |
| Pelagonia region    | 11.435  | 14.708  | 22.974  | 31.589  | 26.676  | 27.029  | 26.746  | 25.260  | 32.190  | 37.088  | 255.695   |
| Northeastern region | 2.134   | 1.661   | 3.045   | 3.446   | 2.939   | 3.829   | 3.243   | 3.466   | 3.922   | 4.829   | 32.514    |
| Southeastern region | 8.593   | 12.143  | 15.957  | 27.998  | 26.107  | 44.525  | 43.811  | 43.810  | 42.133  | 94.474  | 359.551   |
| Polog region        | 8.335   | 8.358   | 14.320  | 16.824  | 18.525  | 15.550  | 19.085  | 24.991  | 26.299  | 23.126  | 175.413   |
| Southwestern region | 96.323  | 135.213 | 141.684 | 184.048 | 192.216 | 223.849 | 249.315 | 248.963 | 219.300 | 328.718 | 2.019.629 |
| Vardar region       | 8.855   | 7.599   | 6.514   | 6.865   | 7.417   | 6.561   | 7.839   | 10.487  | 13.207  | 15.473  | 90.817    |
| Eastern region      | 4.343   | 5.053   | 6.998   | 5.579   | 7.657   | 9.204   | 10.312  | 11.767  | 11.183  | 13.238  | 85.334    |
| Skopje region       | 134.702 | 161.465 | 149.097 | 166.639 | 161.308 | 187.541 | 227.096 | 215.052 | 210.798 | 238.220 | 1.851.918 |

## 1.3 National tourism intensity

Table 5: Arrivals and overnights of national tourists

|                      | 2002      | 2003      | 2004      | 2005      | 2006      | 2007      | 2008      | 2009      | 2010      | 2011      | Total      |
|----------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| Number of tourists   | 318.851   | 325.459   | 299.709   | 312.490   | 297.116   | 306.132   | 350.363   | 328.566   | 324.545   | 320.097   | 3.183.328  |
| Number of overnights | 1.575.664 | 1.660.667 | 1.504.845 | 1.527.053 | 1.474.550 | 1.501.624 | 1.648.073 | 1.517.810 | 1.461.185 | 1.417.868 | 15.289.339 |
| Average stay         | 4,94      | 5,10      | 5,02      | 4,89      | 4,96      | 4,91      | 4,70      | 4,62      | 4,50      | 4,43      | 4,80       |



Table 6: Arrivals of national tourists by statistical regions

|                     | 2002    | 2003    | 2004    | 2005    | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | Total     |
|---------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|-----------|
| TOTAL               | 318.851 | 325.459 | 299.709 | 312.490 | 297.116 | 306.132 | 350.363 | 328.566 | 324.545 | 320.097 | 3.183.328 |
| Pelagonia region    | 56.118  | 54.464  | 45.472  | 46.003  | 39.498  | 38.690  | 49.039  | 38.902  | 55.546  | 61.384  | 485.116   |
| Northeastern region | 3.709   | 3.555   | 1.634   | 1.661   | 853     | 1.291   | 1.296   | 1.436   | 1.093   | 1.379   | 17.907    |
| Southeastern region | 26.613  | 27.521  | 34.535  | 45.333  | 45.881  | 44.644  | 62.892  | 68.416  | 59.403  | 58.351  | 473.589   |
| Polog region        | 7.414   | 11.357  | 15.150  | 12.049  | 12.705  | 9.174   | 9.931   | 17.500  | 17.350  | 16.196  | 128.826   |
| Southwestern region | 183.790 | 189.829 | 169.453 | 170.208 | 160.960 | 175.254 | 193.662 | 170.127 | 154.731 | 147.877 | 1.715.891 |
| Vardar region       | 10.139  | 9.429   | 5.145   | 4.246   | 4.327   | 4.624   | 3.200   | 4.063   | 4.166   | 3.525   | 52.864    |
| Eastern region      | 12.803  | 6.553   | 7.516   | 7.061   | 8.942   | 7.021   | 9.230   | 8.135   | 8.463   | 7.948   | 83.672    |
| Skopje region       | 18.265  | 22.751  | 20.804  | 25.929  | 23.950  | 25.434  | 21.113  | 19.987  | 23.793  | 23.437  | 225.463   |

Table 7: Overnights of national tourists by statistical regions

|                     | 2002      | 2003      | 2004      | 2005      | 2006      | 2007      | 2008      | 2009      | 2010      | 2011      | Total      |
|---------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|------------|
| TOTAL               | 1.575.664 | 1.660.667 | 1.504.845 | 1.527.053 | 1.474.550 | 1.501.624 | 1.648.073 | 1.517.810 | 1.461.185 | 1.417.868 | 15.289.339 |
| Pelagonia region    | 187.393   | 187.716   | 153.956   | 147.225   | 128.785   | 125.697   | 145.182   | 114.439   | 138.164   | 171.830   | 1.500.387  |
| Northeastern region | 4.305     | 4.704     | 2.639     | 2.620     | 1.064     | 1.848     | 1.887     | 2.781     | 1.706     | 1.978     | 25.532     |
| Southeastern region | 100.202   | 156.957   | 217.781   | 180.860   | 191.970   | 167.094   | 216.540   | 233.220   | 220.654   | 217.903   | 1.903.181  |
| Polog region        | 14.549    | 31.178    | 39.130    | 33.652    | 35.299    | 22.436    | 26.260    | 36.155    | 35.156    | 31.661    | 305.476    |
| Southwestern region | 1.164.009 | 1.203.809 | 1.028.797 | 1.104.087 | 1.052.271 | 1.127.957 | 1.202.890 | 1.077.229 | 949.524   | 880.469   | 10.791.042 |
| Vardar region       | 31.802    | 23.338    | 11.310    | 8.985     | 9.518     | 8.969     | 6.022     | 6.741     | 6.930     | 5.666     | 119.281    |
| Eastern region      | 42.753    | 17.040    | 19.356    | 14.283    | 21.277    | 12.490    | 18.137    | 15.742    | 14.504    | 15.614    | 191.196    |
| Skopje region       | 30.651    | 35.925    | 31.876    | 35.341    | 34.366    | 35.133    | 31.155    | 31.503    | 94.547    | 92.747    | 453.244    |

## General metadata

| Code      | Title of the indicator                         | Compliance with CSI EEA or other indicators |   | Classification by DPSIR | Type | Linkage with area  | Frequency of publication   |
|-----------|--|---|---|-------------------------|------|--|----------------------------|
| MK NI 047 | Tourism intensity in the Republic of Macedonia | TOUR 12                                     | Tourism intensity                         | D,P                     | A    | <ul style="list-style-type: none"> <li>- Biological diversity</li> <li>- Nature</li> <li>- Policies</li> <li>- Waste</li> <li>- Water</li> <li>- Air</li> <li>- Transport</li> <li>- Soil</li> </ul> | Yearly<br>Every five years |
|           |  | TOUR 33                                     | Overnights spent in tourism accomodations |                         |      |  |                            |



## Definition

Accommodation establishments are supra-structural facilities facilitating visits and stay of tourists in a given environment. Their observation enables the assessment of regional development. The indicator shows the number of accommodation facilities, rooms and beds.

## Units

- Number of facilities, number of rooms and number of beds.

## Policy relevance

### List of relevant policy documents

- National Strategy for Tourism Development 2009 - 2013
- National Environmental Action Plan - 2 - in Section 4.2.6. Tourism, describes the main challenge for sustainable tourism development, implementation of economic potential with minimum possible impact on the environment.
- Spatial Plan of the Republic of Macedonia – in its Chapter 5.4. «Tourism development and organization of tourist areas», defines the objectives and planning determinations for tourism development.
- National Strategy for Sustainable Development of the Republic of Macedonia – in the section on tourism, presents the directions for sustainable development of tourism, within

short, medium, and long-term frames, up to 2030.

- Strategy for Biological Diversity Protection in the Republic of Macedonia with Action Plan – under measure C.5 «Stimulation of traditional use of biological diversity and eco-tourism», defines the action for identification of sites suitable for eco-tourism.

## Legal grounds

The Law on Tourist Activity specifies the conditions and the manner of performing tourist activity (Chapter 15 Services in rural, ethno and eco-tourism); Law on Catering Activity.

The Law on Environment, the Law on Nature Protection, the Law on Waste Management, the Law on Ambient Air Quality and the Law on Waters regulate partially the requirements for environmental protection in tourist activity.

## Targets

- Integration of the principles of sustainable development and environmental considerations in tourist sector
- Identification of areas of priority importance for tourism development
- Encouragement of exchange of best practices between

public and private tourist interests

- Protection of natural heritage and biological diversity in tourist destinations
- Adoption and implementation of legislation in the area of tourism to regulate the protection of the environment
- Promotion of organic farming, healthy food production and especially traditional production of certain products (e.g. cheese, wine), production of honey, herbs growing, etc.
- Promotion of certain types of tourism such as wine tourism, hunting tourism, birds observation tourism, etc.

## Key policy issue

### What is the impact of accommodation establishments on the environment?

The number of accommodation units may have both positive and negative impacts. Positive impacts are related to proper utilization of the space for facilities location, and negative impacts are made when the space is occupied by accommodation establishments in inadequate manner.

## Key message

The total number of accommodation establishments – facilities in the period 2002 to 2011 has had a trend of increase by 46.7%. Relative to the number of establishments, the number of rooms and beds has noted falling trend by 1.6% for rooms and 5.7% for beds, which is due to improved standard of accommodation facilities.

Figure 1. Total number of accommodation establishments in the period 2002 to 2011

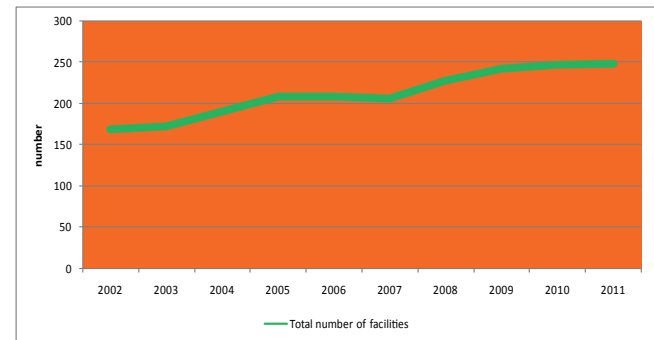


Figure 2. Total number of accommodation establishments – rooms and beds - in the period 2002 to 2011

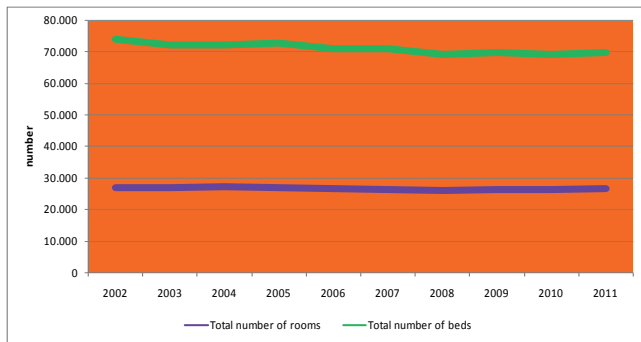


Figure 3. Accommodation establishments – structure

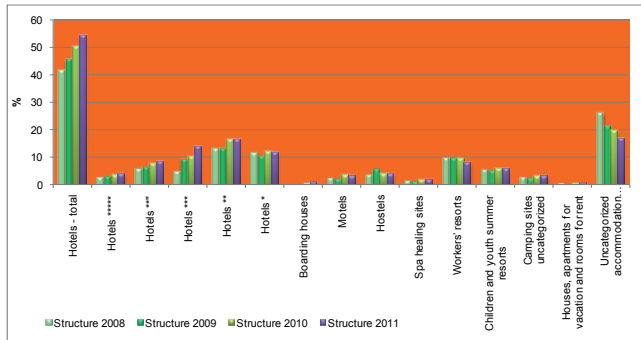


Figure 4. Accommodation establishments – rooms structure

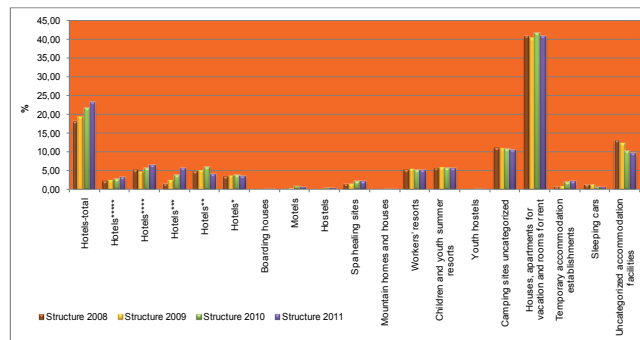
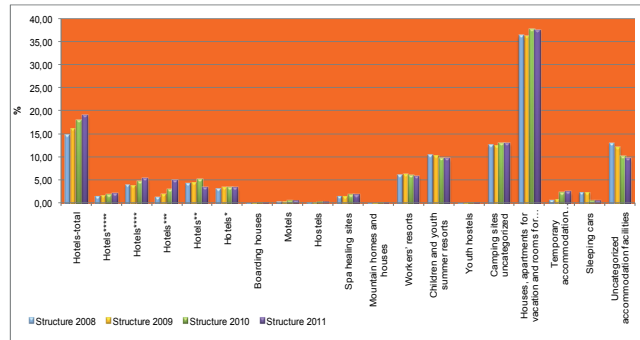


Figure 5. Accommodation establishments – beds structure



## Assessment

In 2008, statistical monitoring of accommodation establishments by stars was introduced for the first time. Categorization of establishments by stars cannot be automatically linked with the categorization by which establishments were monitored earlier and this caused interruption in annual data series.

Tables 1 and 2 indicate that the intensity of accommodation establishments as facilities in the period 2002 to 2011 track an increase of 46.7%, reflecting an increase that has to be observed. In this context, it is of particular importance to underline that increases have been noted with facilities of hotel nature, while decreases have been observed in the area of workers' resorts. This can be assessed as positive trend because it is a result of the transformation of non-commercial into commercial sector which will have to be more observant of environmental protection standards.

Tables 2 and 3 indicate falling trend in the number of rooms and beds resulting from decreased number of rooms in campsites. In environmental terms, this is a positive aspect. The highest number of rooms and beds belongs to the category of houses and apartments for vacation and rooms for rent, followed by hotel

establishments.

## Methodology

- Methodology for the indicator calculation

Development trend of accommodation units.

Share of individual types of accommodation establishments in the total number.

## Data specification

| Title of the indicator                  | Source                     | Reporting obligation                           |
|---|----------------------------|--|
| Tourism density and facilities dynamics | - State Statistical Office | - Statistical Year book<br>- WTO<br>- EUROSTAT |

## Data coverage:

Table 1: Total number of accommodation establishments in the period 2002 to 2011

|                            | 2002   | 2003   | 2004   | 2005   | 2006   | 2007   | 2008   | 2009   | 2010   | 2011   |
|----------------------------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Total number of facilities | 169    | 172    | 191    | 208    | 209    | 206    | 228    | 242    | 247    | 248    |
| Total number of rooms      | 26.877 | 27.017 | 27.222 | 26.925 | 26.503 | 26.246 | 25.952 | 26.390 | 26.189 | 26.448 |
| Total number of beds       | 73.985 | 72.059 | 72.276 | 72.637 | 71.021 | 70.898 | 69.097 | 69.561 | 69.102 | 69.737 |

Table 2: Accommodation establishments in catering industry – facilities structure

|                   | 2008 | 2009 | 2010 | 2011 | Structure 2008 | Structure 2009 | Structure 2010 | Structure 2011 |
|-------------------|------|------|------|------|----------------|----------------|----------------|----------------|
| TOTAL             | 228  | 242  | 247  | 248  | 100            | 100            | 100            | 100            |
| Hotels - total    | 95   | 110  | 124  | 135  | 41,67          | 45,45          | 50,20          | 54,44          |
| Hotels *****      | 8    | 9    | 9    | 10   | 3,51           | 3,72           | 3,64           | 4,03           |
| Hotels ****       | 15   | 17   | 19   | 21   | 6,58           | 7,02           | 7,69           | 8,47           |
| Hotels ***        | 13   | 24   | 25   | 34   | 5,70           | 9,92           | 10,12          | 13,71          |
| Hotels **         | 31   | 33   | 41   | 41   | 13,60          | 13,64          | 16,60          | 16,53          |
| Hotels *          | 28   | 27   | 30   | 29   | 12,28          | 11,16          | 12,15          | 11,69          |
| Boarding houses   | 2    | 2    | 2    | 3    | 0,88           | 0,83           | 0,81           | 1,21           |
| Motels            | 7    | 7    | 9    | 8    | 3,07           | 2,89           | 3,64           | 3,23           |
| Hostels           | 10   | 16   | 10   | 10   | 4,39           | 6,61           | 4,05           | 4,03           |
| Spa healing sites | 5    | 5    | 5    | 5    | 2,19           | 2,07           | 2,02           | 2,02           |

|  | 2008 | 2009 | 2010 | 2011 | Structure 2008 | Structure 2009 | Structure 2010 | Structure 2011 |
|--|------|------|------|------|----------------|----------------|----------------|----------------|
| Workers' resorts                                   | 24   | 25   | 24   | 20   | 10,53          | 10,33          | 9,72           | 8,06           |
| Children and youth summer resorts                  | 14   | 14   | 15   | 15   | 6,14           | 5,79           | 6,07           | 6,05           |
| Camping sites uncategorized                        | 8    | 8    | 8    | 8    | 3,51           | 3,31           | 3,24           | 3,23           |
| Houses, apartments for vacation and rooms for rent | 3    | 2    | 2    | 2    | 1,32           | 0,83           | 0,81           | 0,81           |
| Uncategorized accommodation establishments         | 60   | 53   | 48   | 42   | 26,32          | 21,90          | 19,43          | 16,94          |

Table 3: Accommodation establishments in catering industry- rooms structure

|                 | 2008   | 2009   | 2010   | 2011   | Structure 2008 | Structure 2009 | Structure 2010 | Structure 2011 |
|-----------------|--------|--------|--------|--------|----------------|----------------|----------------|----------------|
| TOTAL           | 25.952 | 26.390 | 26.189 | 26.448 | 100            | 100            | 100            | 100            |
| Hotels-total    | 4.747  | 5.142  | 5.651  | 6.110  | 18,29          | 19,48          | 21,58          | 23,10          |
| Hotels*****     | 628    | 688    | 709    | 833    | 2,42           | 2,61           | 2,71           | 3,15           |
| Hotels****      | 1.408  | 1.293  | 1.453  | 1.719  | 5,43           | 4,90           | 5,55           | 6,50           |
| Hotels***       | 452    | 728    | 963    | 1.522  | 1,74           | 2,76           | 3,68           | 5,75           |
| Hotels**        | 1.307  | 1.402  | 1.541  | 1.088  | 5,04           | 5,31           | 5,88           | 4,11           |
| Hotels*         | 952    | 1.031  | 985    | 948    | 3,67           | 3,91           | 3,76           | 3,58           |
| Boarding houses | 31     | 31     | 31     | 31     | 0,12           | 0,12           | 0,12           | 0,12           |
| Motels          | 104    | 129    | 159    | 152    | 0,40           | 0,49           | 0,61           | 0,57           |



|  | 2008   | 2009   | 2010   | 2011   | Structure<br>2008 | Structure<br>2009 | Structure<br>2010 | Structure<br>2011 |
|--|--------|--------|--------|--------|-------------------|-------------------|-------------------|-------------------|
| Hostels  | 88     | 78     | 90     | 79     | 0,34              | 0,30              | 0,34              | 0,30              |
| Spa healing sites                                  | 412    | 418    | 538    | 533    | 1,59              | 1,58              | 2,05              | 2,02              |
| Mountain homes and houses                          | 10     | 10     | 10     | 10     | 0,04              | 0,04              | 0,04              | 0,04              |
| Workers' resorts                                   | 1.432  | 1.508  | 1.352  | 1.334  | 5,52              | 5,71              | 5,16              | 5,04              |
| Children and youth summer resorts                  | 1.548  | 1.592  | 1.431  | 1.431  | 5,96              | 6,03              | 5,46              | 5,41              |
| Youth hostels                                      | 24     | 24     | 24     | 24     | 0,09              | 0,09              | 0,09              | 0,09              |
| Camping sites uncategoryzed                        | 2.916  | 2.903  | 2.784  | 2.782  | 11,24             | 11,00             | 10,63             | 10,52             |
| Houses, apartments for vacation and rooms for rent | 10.569 | 10.624 | 10.827 | 10.817 | 40,73             | 40,26             | 41,34             | 40,90             |
| Temporary accommodation establishments             | 250    | 267    | 506    | 541    | 0,96              | 1,01              | 1,93              | 2,05              |
| Sleeping cars                                      | 372    | 372    | 123    | 123    | 1,43              | 1,41              | 0,47              | 0,47              |
| Uncategoryzed accommodation facilities             | 3.449  | 3.292  | 2.663  | 2.481  | 13,29             | 12,47             | 10,17             | 9,38              |

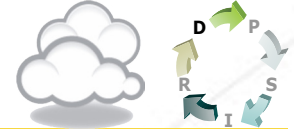
Table 4: Accommodation establishments in catering industry – beds structure

|  | 2008   | 2009   | 2010   | 2011   | Structure<br>2008 | Structure<br>2009 | Structure<br>2010 | Structure<br>2011 |
|--|--------|--------|--------|--------|-------------------|-------------------|-------------------|-------------------|
| TOTAL  | 69.097 | 69.561 | 69.102 | 69.737 | 100,00            | 100,00            | 100,00            | 100,00            |
| Hotels-total   | 10.364 | 11.307 | 12.374 | 13.317 | 15,00             | 16,25             | 17,91             | 19,10             |
| Hotels*****  | 1.129  | 1.288  | 1.251  | 1.488  | 1,63              | 1,85              | 1,81              | 2,13              |
| Hotels****   | 2.893  | 2.748  | 3.150  | 3.715  | 4,19              | 3,95              | 4,56              | 5,33              |
| Hotels***  | 965    | 1.507  | 2.072  | 3.474  | 1,40              | 2,17              | 3,00              | 4,98              |
| Hotels**   | 3.094  | 3.264  | 3.565  | 2.393  | 4,48              | 4,69              | 5,16              | 3,43              |
| Hotels*  | 2.283  | 2.500  | 2.336  | 2.247  | 3,30              | 3,59              | 3,38              | 3,22              |
| Boarding houses  | 75     | 75     | 71     | 71     | 0,11              | 0,11              | 0,10              | 0,10              |
| Motels   | 289    | 359    | 406    | 371    | 0,42              | 0,52              | 0,59              | 0,53              |
| Hostels  | 181    | 163    | 195    | 184    | 0,26              | 0,23              | 0,28              | 0,26              |
| Spa healing sites  | 1.089  | 1.091  | 1.217  | 1.217  | 1,58              | 1,57              | 1,76              | 1,75              |
| Mountain homes and<br>houses                             | 60     | 60     | 60     | 60     | 0,09              | 0,09              | 0,09              | 0,09              |
| Workers' resorts   | 4.378  | 4.501  | 4.056  | 3.996  | 6,34              | 6,47              | 5,87              | 5,73              |
| Children and youth<br>summer resorts                     | 7.315  | 7.272  | 6.668  | 6.668  | 10,59             | 10,45             | 9,65              | 9,56              |
| Youth hostels  | 48     | 48     | 48     | 48     | 0,07              | 0,07              | 0,07              | 0,07              |
| Camping sites<br>uncategorized                           | 8.800  | 8.726  | 8.971  | 8.971  | 12,74             | 12,54             | 12,98             | 12,86             |
| Houses, apartments<br>for vacation and<br>rooms for rent | 25.119 | 25.134 | 26.132 | 26.132 | 36,35             | 36,13             | 37,82             | 37,47             |

|  | 2008  | 2009  | 2010  | 2011  | Structure<br>2008 | Structure<br>2009 | Structure<br>2010 | Structure<br>2011 |
|--|-------|-------|-------|-------|-------------------|-------------------|-------------------|-------------------|
| Temporary accommodation establishments | 604   | 632   | 1.537 | 1.692 | 0,87              | 0,91              | 2,22              | 2,43              |
| Sleeping cars                          | 1.680 | 1.680 | 384   | 384   | 2,43              | 2,42              | 0,56              | 0,55              |
| Uncategorized accommodation facilities | 9.095 | 8.513 | 6.983 | 6.626 | 13,16             | 12,24             | 10,11             | 9,50              |

## General metadata

| Code      | Title of the indicator                  | Compliance with CSI EEA or other indicators |                 | Classification by DPSIR | Type | Linkage with area  | Frequency of publication |
|-----------|---|---|-----------------|-------------------------|------|--|--------------------------|
| MK NI 048 | Tourism density and facilities dynamics | TOUR 14                                     | Tourism density | S, P                    | A    | <ul style="list-style-type: none"> <li>– Biodiversity</li> <li>– Nature</li> <li>– Policies</li> <li>– Waste</li> <li>– Water</li> <li>– Air</li> <li>– Transport</li> </ul> | Annually                 |



## Definition

Share in BDP is the share of the gross value added, in percentage, in the area of tourism in the total Gross Domestic Product on national level.

## Units

- %.

## Policy relevance

List of relevant policy documents

- National Strategy for Tourism Development 2009 - 2013
- National Environmental Action Plan - 2 - in Section 4.2.6. Tourism, describes the main challenge for sustainable tourism development, implementation of economic potential with minimum possible impact on the environment.
- Spatial Plan of the Republic of Macedonia – in its Chapter 5.4. «Tourism development and organization of tourist areas», defines the objectives and planning determinations for tourism development.

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- Strategy for Biological Diversity Protection in the Republic of Macedonia with Action Plan– under measure C.5 «Stimulation of traditional use of biological diversity and eco-tourism», defines the action for identification of sites suitable for eco-tourism.

## Legal ground

The Law on Tourist Activity specifies the conditions and the manner of performing tourist activity; Law on Catering Activity.

The Law on Environment, the Law on Nature Protection, the Law on Waste Management, the Law on Ambient Air Quality and the Law on Waters regulate partially the requirements for environmental protection in tourist activity.

## Targets

- Integration of the principles of sustainable

development and environmental considerations in tourist sector

- Identification of areas of priority importance for tourism development
- Encouragement of exchange of best practices between public and private tourist interests
- Protection of natural heritage and biological diversity in tourist destinations
- Adoption and implementation of legislation in the area of tourism to regulate the protection of the environment
- Promotion of organic farming, healthy food production and especially traditional production of certain products (e.g. cheese, wine), production of honey, herbs growing, etc.
- Promotion of certain types of tourism such as wine tourism, hunting tourism, birds observation tourism, etc.

## Key policy issue

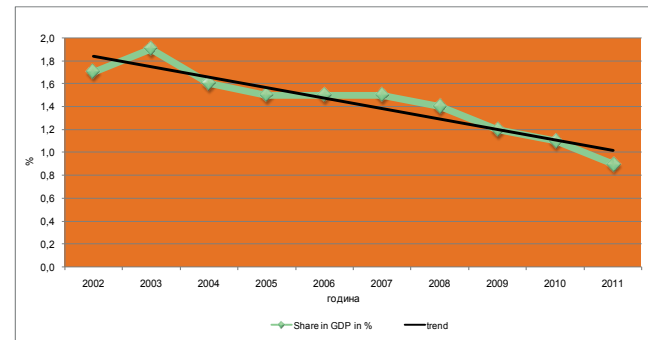
What is the impact of tourism relying on the

## characteristics of the environment on the economic development of the Republic of Macedonia?

### Key message

Share of tourism in the economic development of the Republic of Macedonia is very low. Its share was the highest in 2003 reaching 1.9%, and it was the lowest in 2011 amounting 0.9%. Share of tourism in the overall gross domestic product notes constant trend of decrease.

Figure 1. Share of tourism in GDP in %



## Assessment

The Figure shows that the share of tourism in GDP is relatively low with falling trend. I.e. with no improvement. Its share was the highest in 2003 reaching 1.9%, and it was the lowest in 2011 amounting 0.9%. Observation should enable insight in the extent in which effects from tourist development on the environment improve.

Revenues acquired on the basis of tourist fee and taxes will enable environment planning and protection and also offer the opportunity to legal and natural persons to improve their living and working conditions.

## Data coverage:

Table 1: Share of “Catering and tourism” i.e. “Hotels and restaurants” sector in gross domestic product (production method)

|                   | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 |
|-------------------|------|------|------|------|------|------|------|------|------|------|
| Share in GDP in % | 1.7  | 1.9  | 1.6  | 1.5  | 1.5  | 1.5  | 1.4  | 1.2  | 1.1  | 0.9  |

## Methodology

- Methodology for the indicator calculation

Share of value added from tourism in GDP.

## Data specification

| Title of the indicator             | Source  | Reporting obligation                                   |
|------------------------------------|---|--|
| Economic value of tourism industry | – S t a t e<br>S t a t i s t i c a l<br>O f f i c e | – Yearly publication on GDP<br>– Statistical Year book |

## General metadata

| Code      | Title of the indicator             | Compliance with CSI EEA or other indicators |                                    | Classification by DPSIR | Type | Linkage with area  | Frequency of publication |
|-----------|------------------------------------|---|------------------------------------|-------------------------|------|--|--------------------------|
| MK NI 049 | Economic value of tourism industry | TOUR 35                                     | Economic value of tourism industry | D                       | B    | <ul style="list-style-type: none"><li>– Biodiversity</li><li>– Nature</li><li>– Policies</li><li>– Waste</li><li>– Water</li><li>– Air</li><li>– Transport</li></ul> | Annually                 |