

TOURISM





MK – NI 047

TOURISM INTENSITY IN THE REPUBLIC OF MACEDONIA

Period of indicator assessment

- September 2007 – April 2008

Explanation

- Justification for indicator selection

Justification for the selection of tourism indicators should be seen in the fact that tourism is social, economic and significant spatial phenomenon. This means that tourism is in close correlation with the environment.

The above correlation can be identified in its incentive interdependence on the environment. Cases of environmental degradation and devastation, absence of innate environmental elements in the place of permanent residence and contradiction between emitting and attractive environment are among the main reasons for involvement of the local population in tourist activity.

The attractiveness of the environment is the leading reason for tourists visit and stay. The extent of visits and stays appears as indicator of environment attractiveness. Attractiveness without tourists interest would remain only potential value of the environment.

Development of tourism assumes sustainable use of environmental elements. This means that the basis of tourism development should also constitute environment protection. However, tourism development often leads to threats to stability of ecosystems and authentic characteristics of the space due to enormous and inadequate building of reception facilities and improper attitudes of visitors towards the environment.

Tourist indicators as tourist visits and stay through the intensity, structure and dynamics of development are suitable for monitoring as data is available and official.

1.1 International tourist intensity

Justification for the selection of the indicator of international tourist visits is based on the fact that higher extent of international visits reflects the environment as an environment of international importance. Advanced experience of foreign tourists implies greater attractiveness for visits. The intensity of visits should be analyzed by registered tourists in catering establishments, through transport, registration by interview and data on regional distribution.

1.2 Foreign tourist stay

Foreign tourists with their stay indicate the level to which the environment has been adapted to their demands. In this way, the trend of attractiveness at international level will be assessed.

1.3 National tourist intensity

This indicator shows the level of interest demonstrated by national tourists for visits and stay in





tourist areas. In this way it also indicates the ratio between stay and visits in terms of length of stay, reflecting the achievement of environment adaptation to the demands of tourists.

Definition

The indicator shows:

1.1 International tourist intensity

The total number of foreign tourists by years shows the development dimension. Using the growth rate, the extent to which the attractiveness of the environment as receptive environment will be utilized may be estimated, the needs for expansion of accommodation and other reception establishments may be defined. In this context, the expansion of attractive substance in receptive environment can be defined in terms of foreign tourist visits.

The number of foreign tourists by month determines the seasonal concentration. This indicator supports the determination of activities and measures by which appropriate supply should be offered in the period of seasonal concentration in order to prevent disruption of environmental balance while satisfying tourist demands of foreign visitors.

The structure of visitors by country of origin determines the emitting spatial zones. Monitoring of the trends in the level of visits provides the opportunity for regional adaptation of the elements of environment as tourist supply of the receptive space to tourist consumption.

1.2 Overnights of foreign tourists

The total number of overnights of foreign tourists in the Republic of Macedonia by years has had a varying trend, marking growing or dropping of overnights by years for certain temporal period.

The total number of overnights of foreign tourists by years reflects the attractiveness and satisfaction of tourists with the stay in receptive environment as development dimension. This is the way by which both positive and obstructive undertakings in this context can be observed by years.

The stay acquired by months enables to assess the stay in seasonal terms and determine the activities in that regard.

The structure of realized overnights by country of origin enables to assess the acceptability of attractive properties of environmental elements in certain emitting environments and monitor the development in that context.

The average stay of foreign tourists expresses the ratio between the realized overnights and the number of tourists. Monitoring of these indicators enables the progress in the satisfaction of tourists in the receptive country with the visit to be observed, which facilitates justified approach to tourist supply improvement with reference to foreign tourist market.

1.3 National tourists intensity

National tourist intensity reflects the aspiration of domestic tourists towards the environment and its properties. The growth in the number of national visitors assumes that the receptive and attractive resources are affordable to national tourists.





Regional distribution within national tourist industry shows the level of attractiveness and receptiveness of individual tourist regional target areas as distinct environments.

The indicated stay of national tourists expresses the ratio between realized overnights and number of tourists. Monitoring of this data enables to determine the progress in the satisfaction of tourists with the visit in receptive environment, which facilitates justified approach to tourist supply improvement with reference to national tourist market.

Units

- Number, intensity and structure.

Policy relevance

List of relevant policy documents

- **National Strategy for Tourism Development 2008 - 2012**
- **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 ("Official Gazette of the Republic of Macedonia" No. 62/2004) specifies the conditions and the manner of performing tourist activity (Chapter 15 Services in rural, ethno and eco-tourism, Article 51).

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 well arranged 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.

Specific policy issue

What is the contribution of tourism in pollutants emission?

Increased number of tourists in communication and receptive-attractive environment, the length of stay and activities they perform can contribute significantly to the emission of pollutants resulting in pollution. Pollution can take the following forms:

- exhaust gases of transportation means to move through the space;





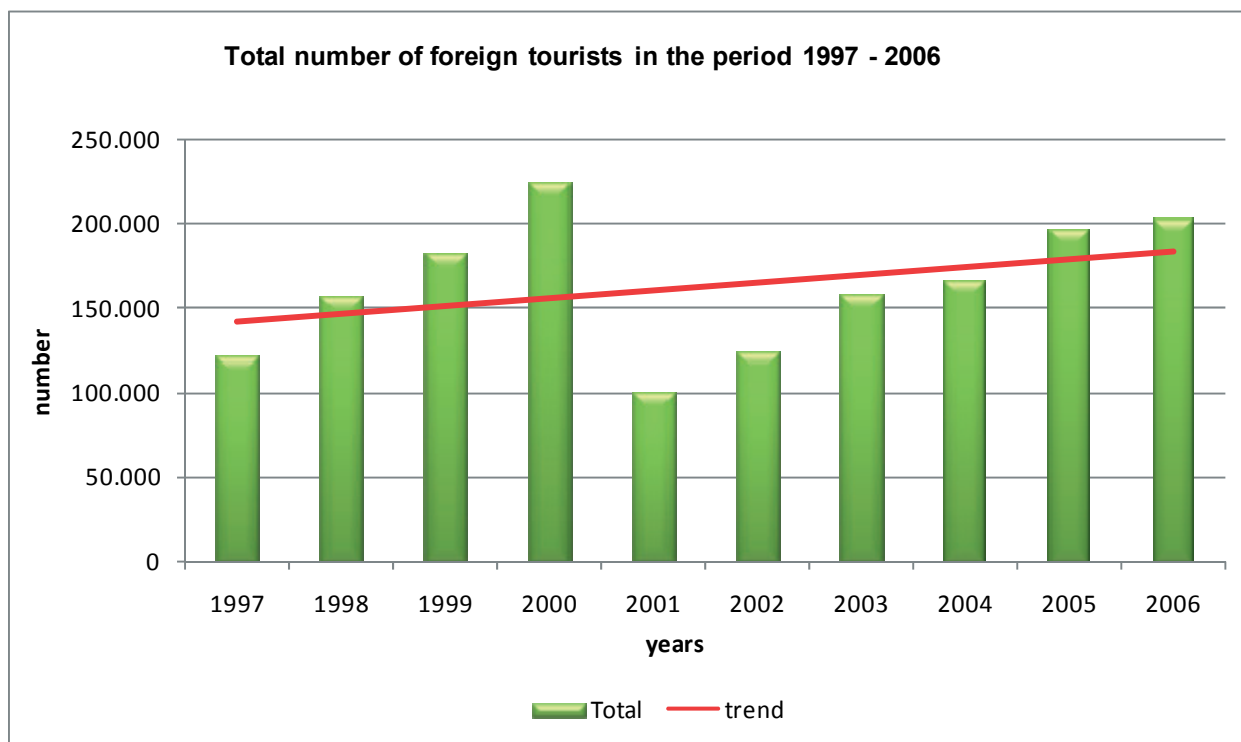
- enhanced intensity and inadequate structure of accommodation establishments, as well as increased number of visitors and overnights lead to increased amounts of:
 - wastewater;
 - solid waste;
 - dust and
 - smoke
- use of water resources for bathing assumes modification of the chemical composition and introduction of biological agents;
- increased use of freon containing appliances causes not only change in atmospheric relations in the local environment, but also global change.
- use of water resources by motor driven vessels leads not only to higher exhaust gases emission, but also higher discharge of fuel and maintenance products;
- enhanced intensity and inadequate structure of accommodation establishments and overnights result in increased level of smoke in the air;
- increased level of smoke can also come from barbeques and certain tourist animation activities.

Key message

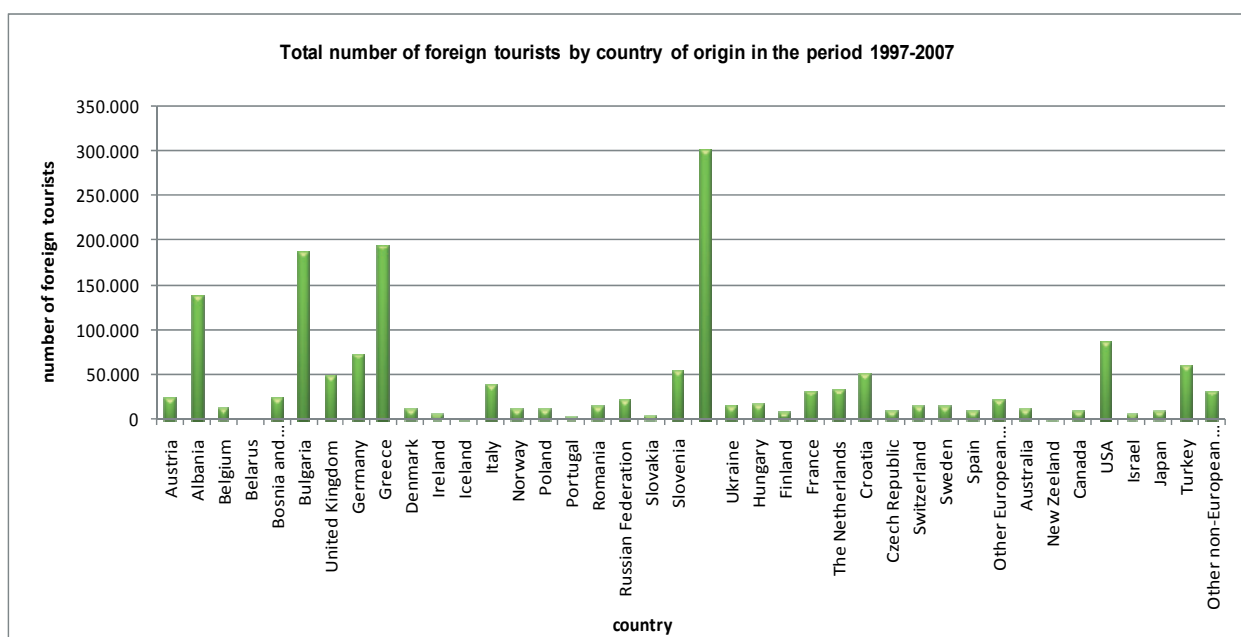
Data and information provided by this indicator show that there have been no significant achievements in development. Stagnation in terms of tourist visits, stay, intensity and quality of accommodation establishments has been evident throughout the period from the independence of the Republic of Macedonia to the last analyzed year. During this period, the levels of 1999 and 2000 have not been reached. Nevertheless, the problems of pollution have not been settled.

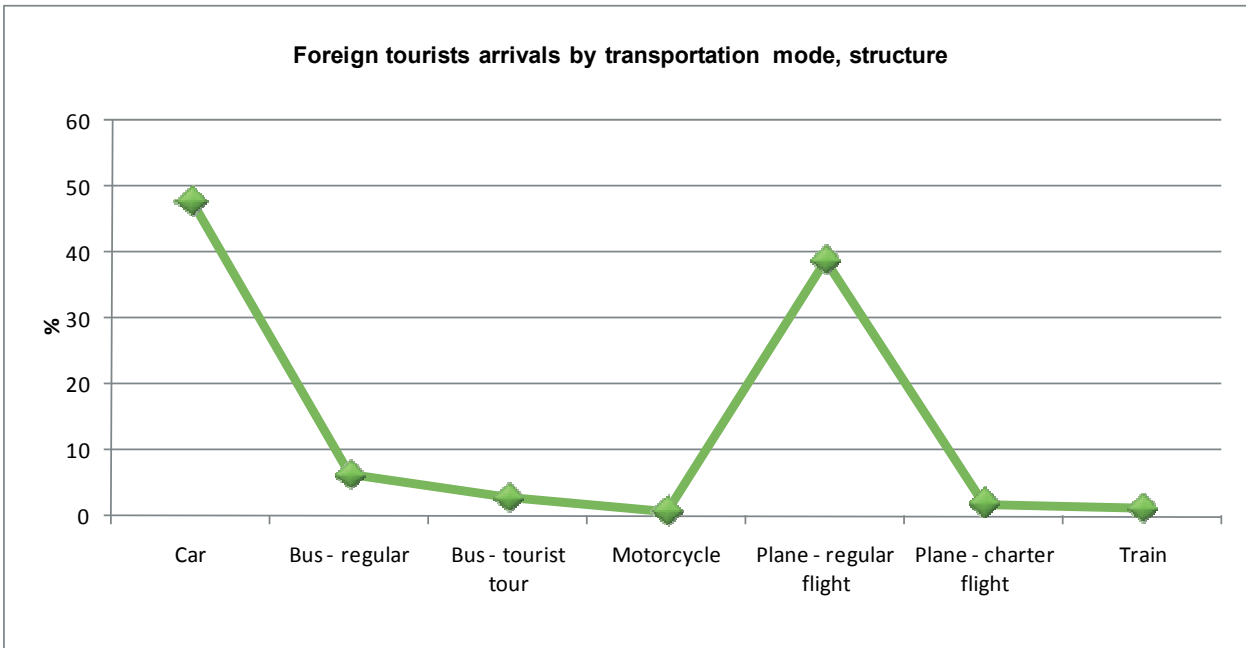
Considering the fact that tourism is organized activity, monitoring of these indicators is necessary and so are the actions of all stakeholders for the purpose of environment protection and improvement through timely interventions and planned activities.



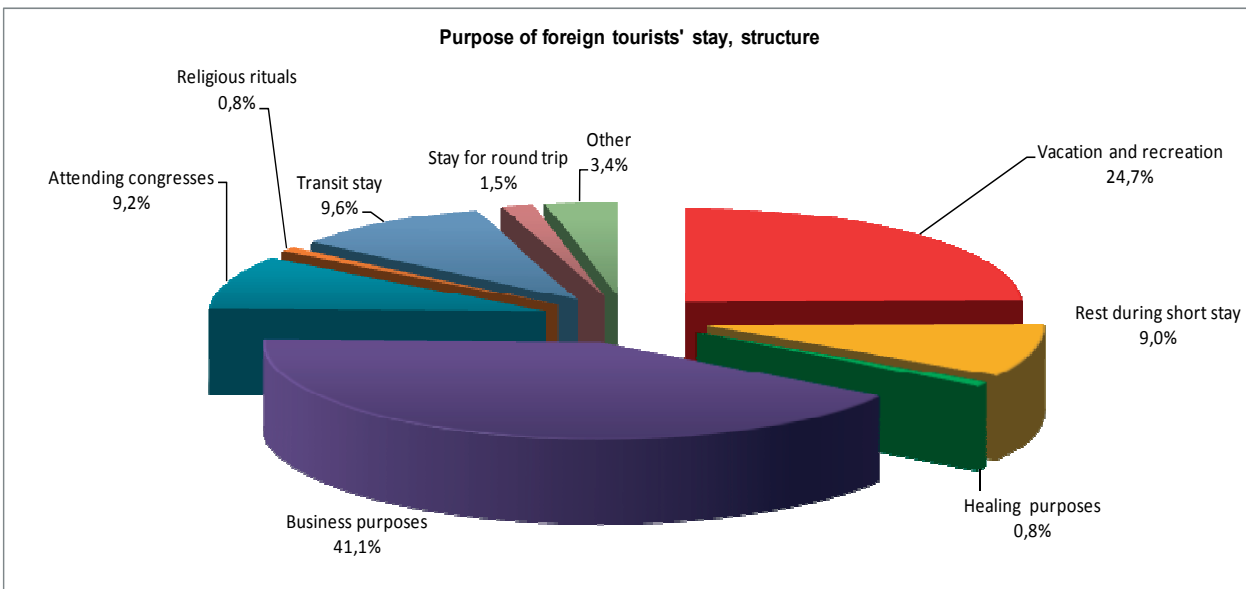


1.1 International tourist intensity





Note: Foreign tourists arrivals by transportation mode, structure, according to interview conducted in 2004

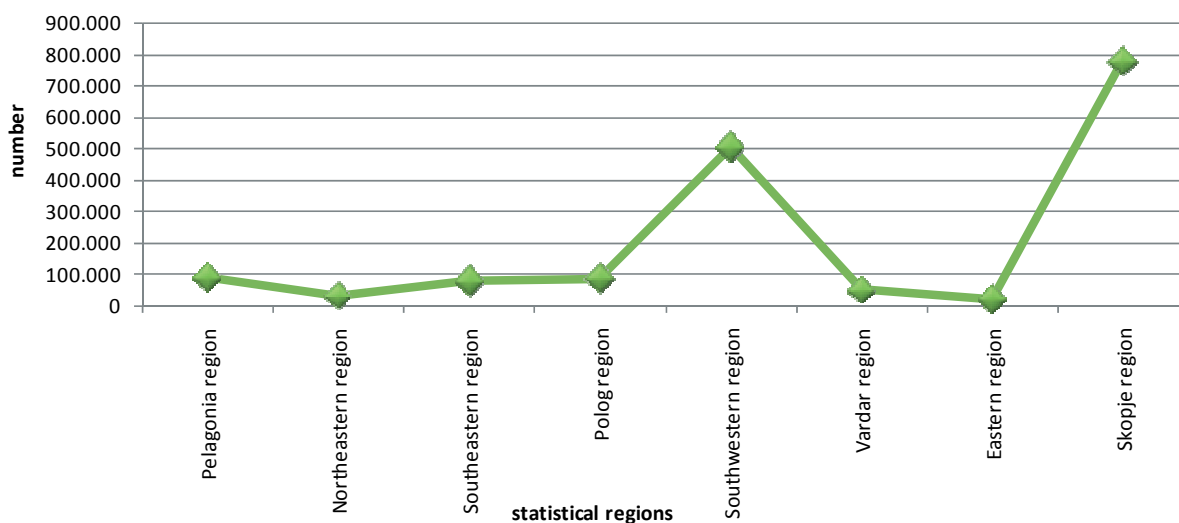


Note: Foreign tourists arrivals by transportation mode, structure, according to interview conducted in 2004

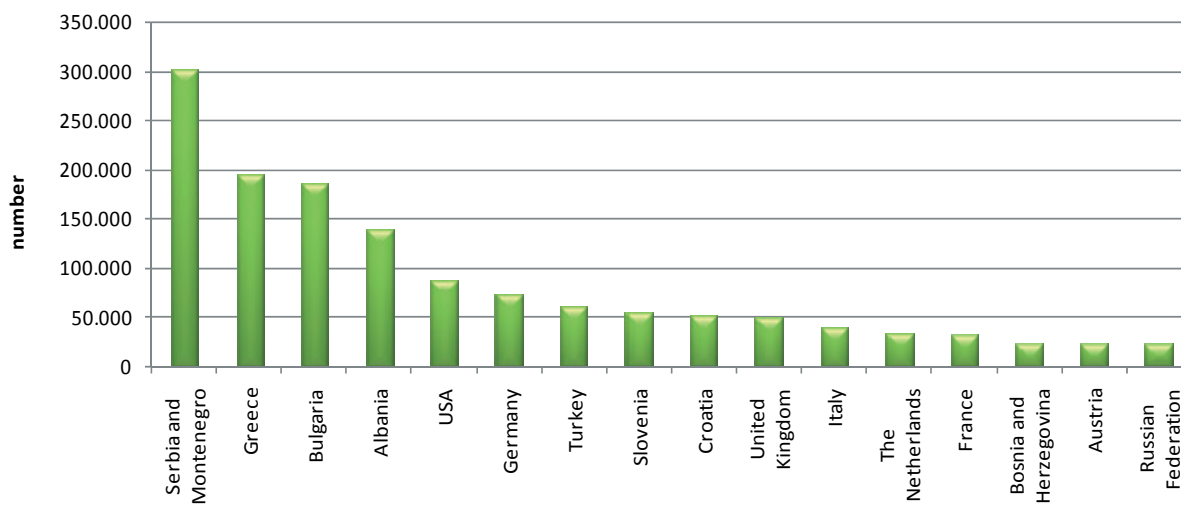




Total number of foreign tourists' arrivals, by statistical regions, in the period 1997-2006

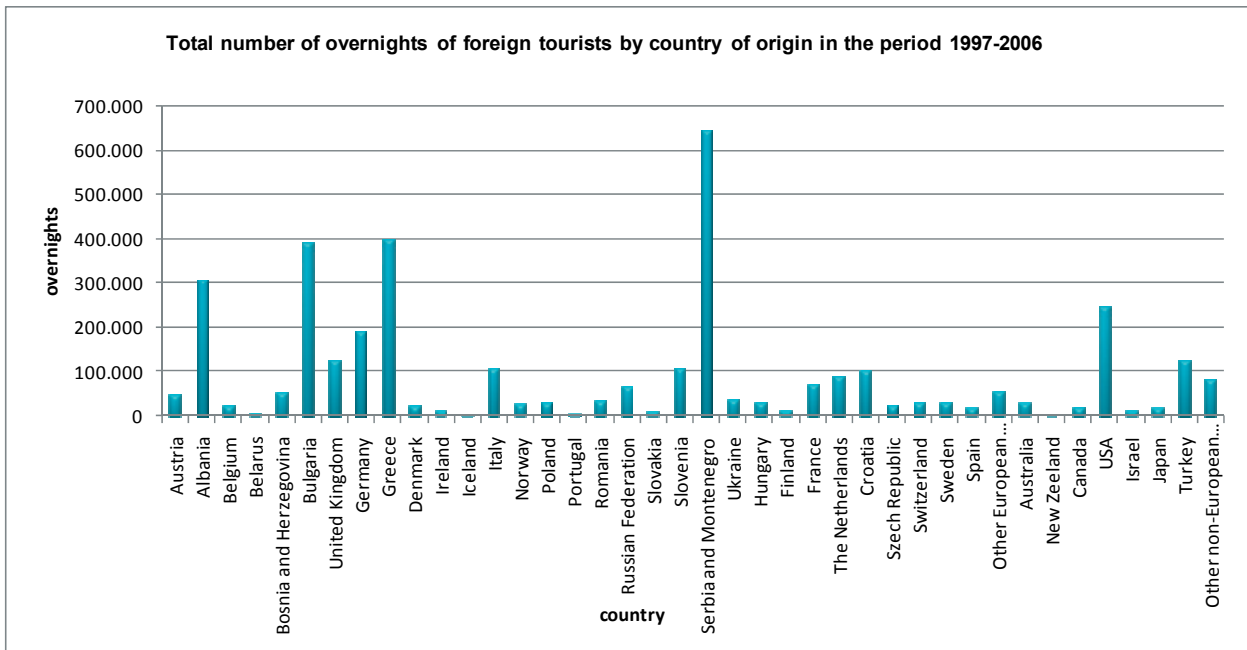
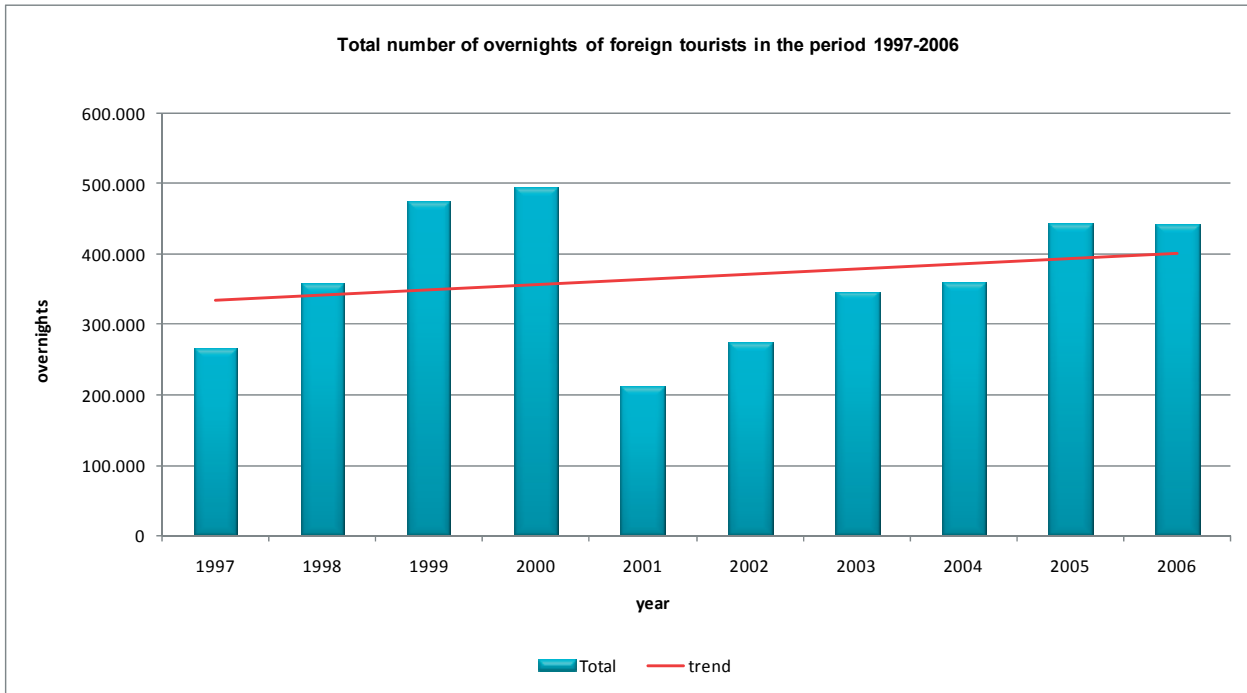


Countries with significant share in the number of foreign tourists



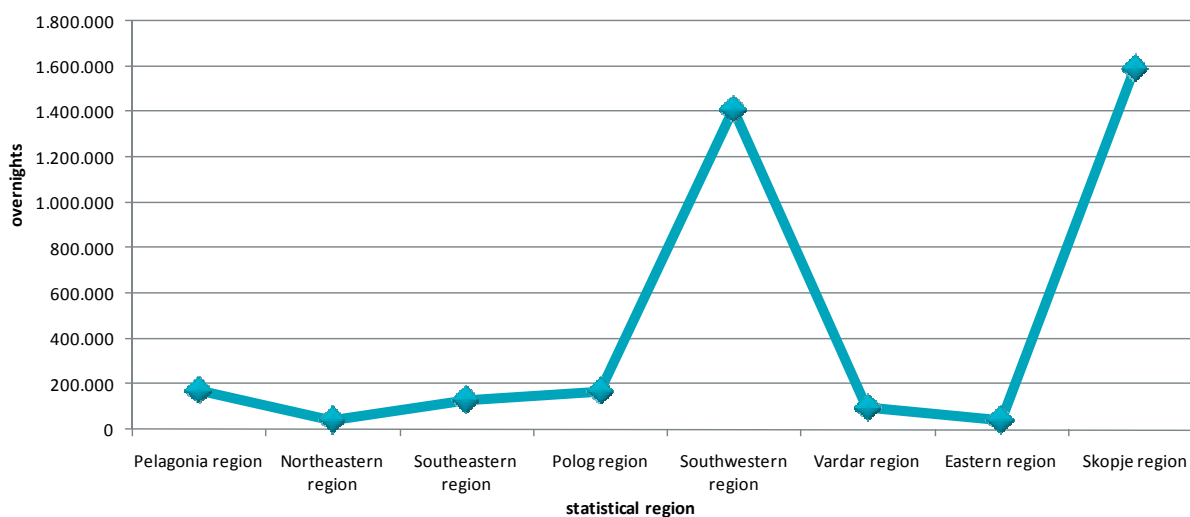


1.2 Overnights of foreign tourists

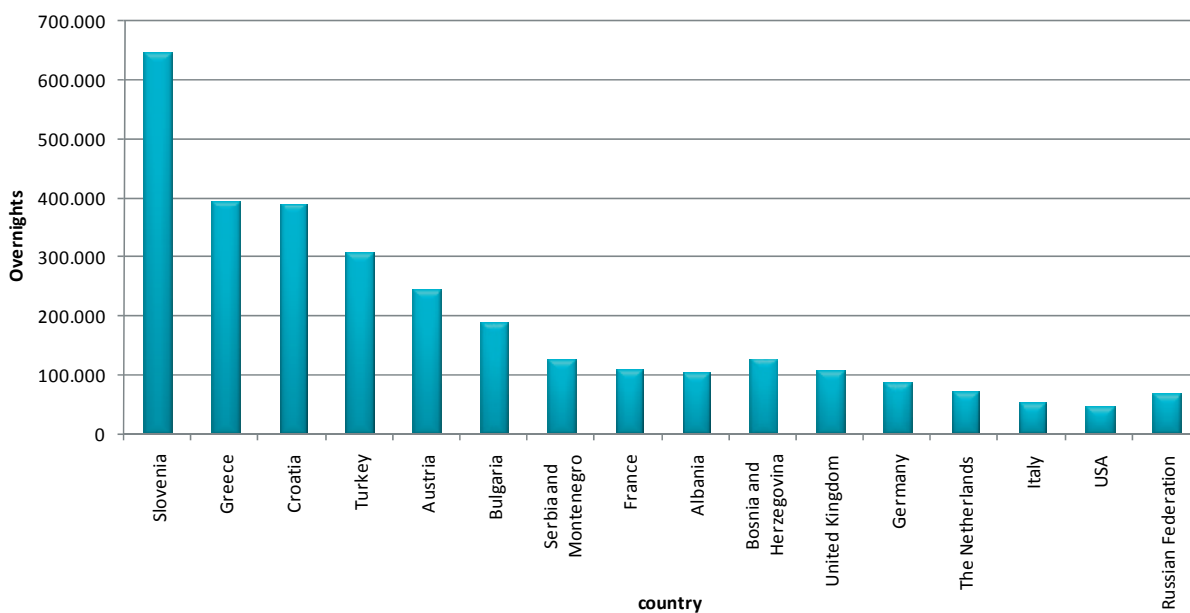




Total number of overnights of foreign tourists by statistical regions in the period 1997-2006

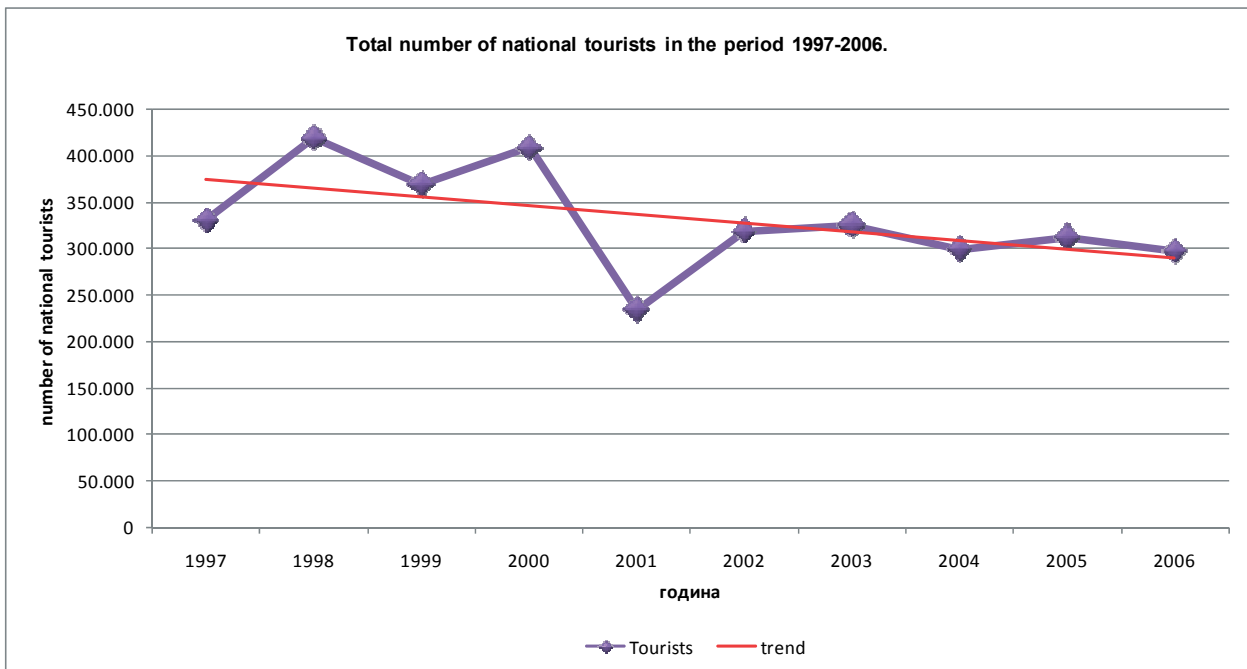
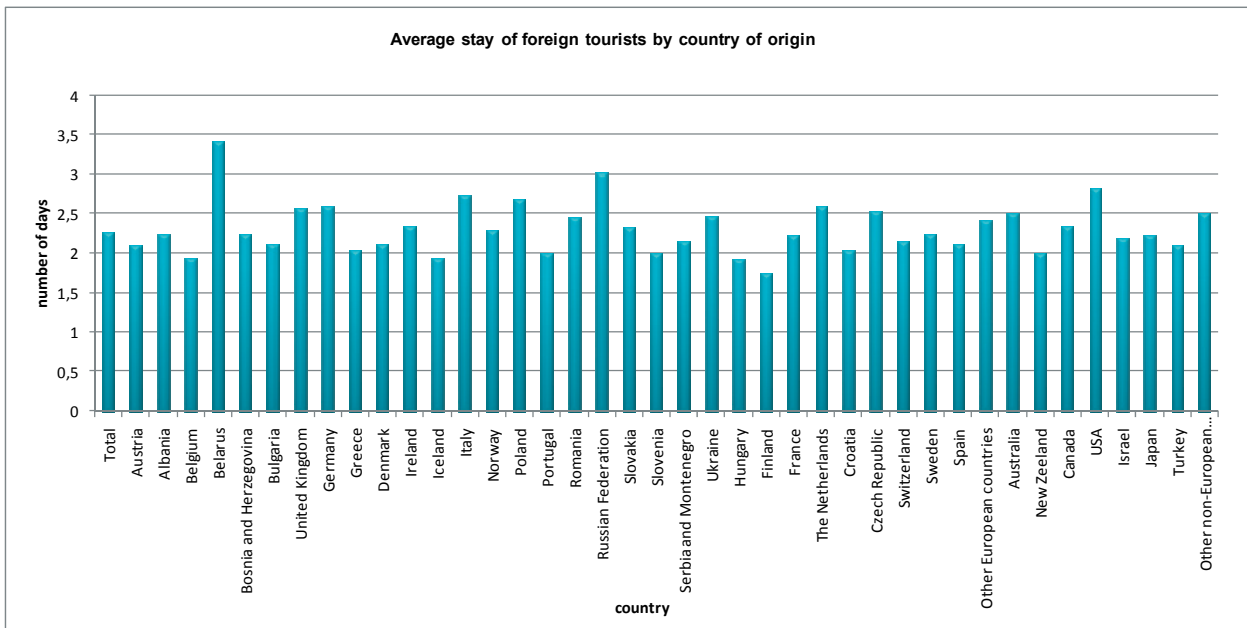


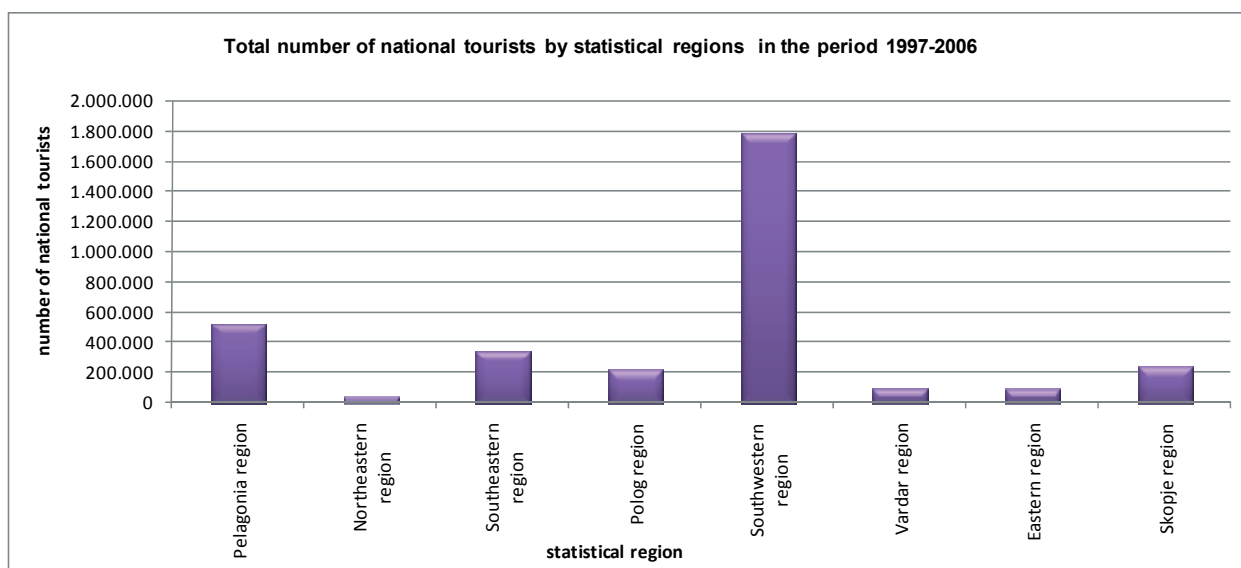
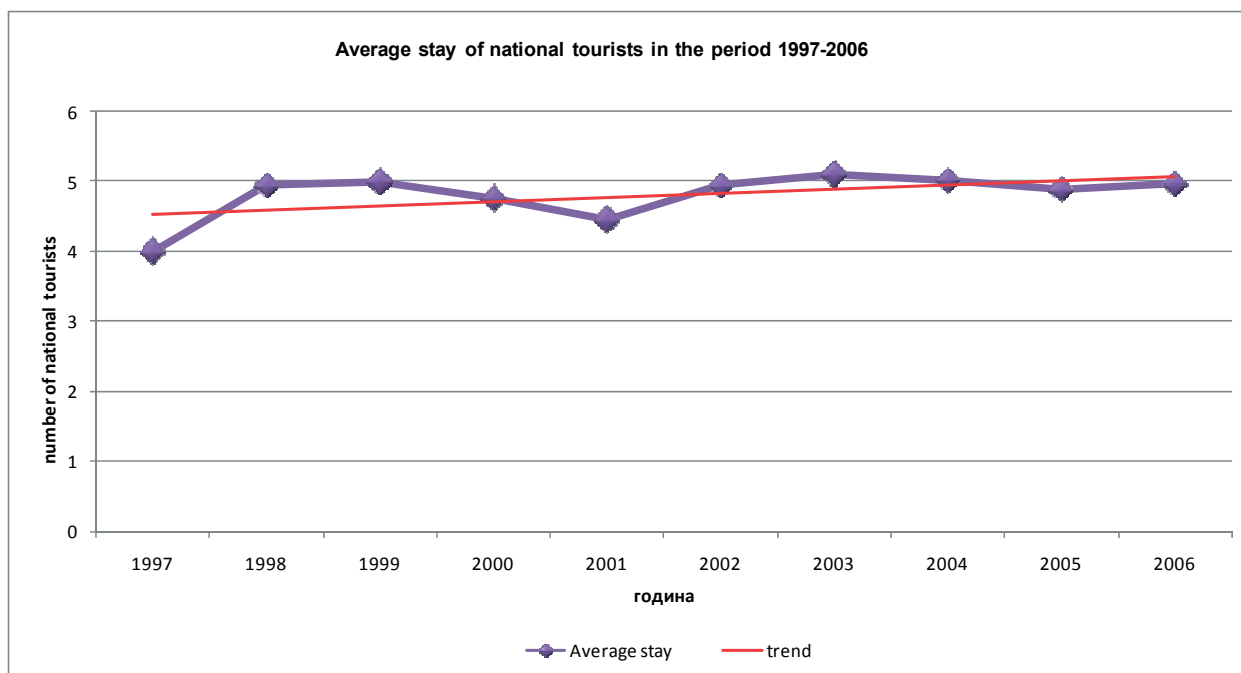
States with significant share in the average stay of foreign tourists

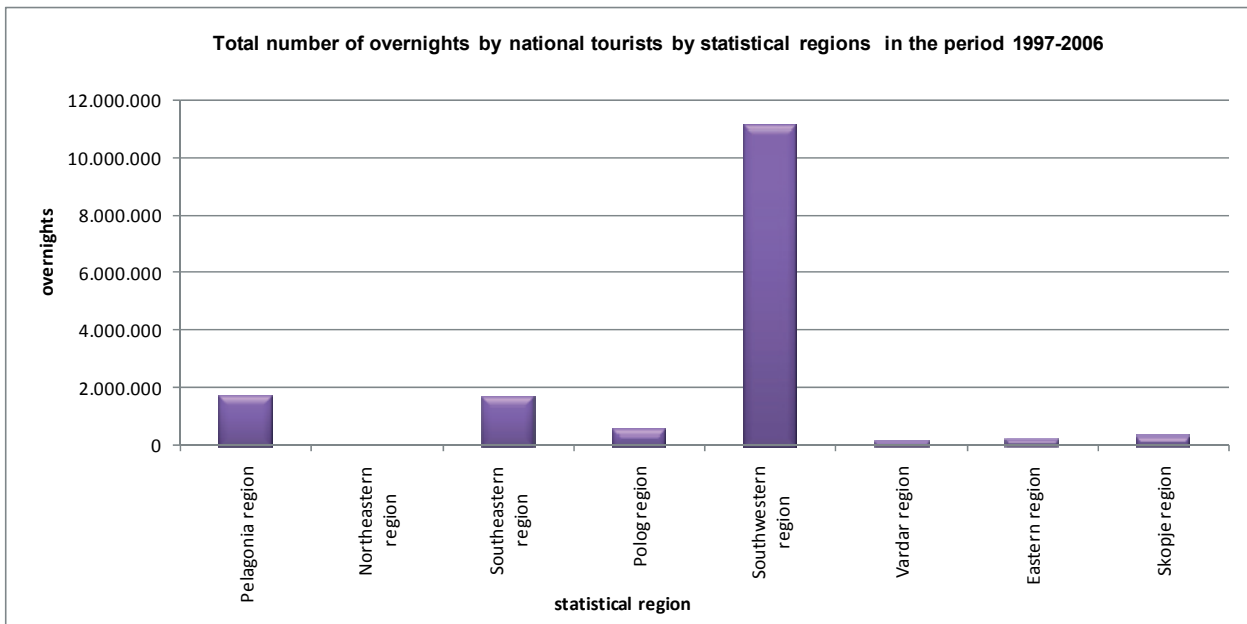




1.3 National tourist intensity







Assessment

1.1 International tourist intensity

Data presented in Table 1 and diagrams show that the Republic of Macedonia has been visited by tourists from many countries in the world. Tourists from Europe, Asia, Australia and North America dominate. During the ten year reporting period, the structure of visits is dominated by tourists from the neighborhood of the Republic of Macedonia. Table 5 indicates that the leading position is occupied by tourists from Serbia and Montenegro, followed by Greece, Bulgaria and Albania. 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.

Data in Table 2 and the Diagram show that most of the foreign tourists arrive by car. This indicator is in the context of the use of this type of transport mode in other state destinations, too. However, tracking the mode of foreign tourists arrival will help us identify the use of more rationale transport modes, such as railway, bus and plain, because they make lower negative impact on the environment.

Table 3 presents the purposes for tourists' visits. Data reflect that the business purposes are predominant, which is by itself a negative feature, as such foreign tourists do not use the attractions of the environment, but urban possibilities instead. Observation of this aspect will enable an insight in the extent to which foreign tourist intensity will increase in terms of vacation and recreation as reflection of the properties of the environment.

Regional distribution presented in Table 4 and the Diagram shows that leading regional centers 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 tourists visits for the purpose of redistribution of visits.

1.2 Overnights of foreign tourists

Table 6 indicates that overnights follow the visits of foreign tourists in the Republic of Macedonia. The summary results presented in Table 9 lead to the conclusion that the highest number of overnights was realized by tourists from neighboring countries to the Republic of Macedonia, while such results in relation to tourists from Western European and other countries with recognized tourist tradition lag behind in the stay. 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 accomplished foreign overnights presented in Table 7 shows that the highest number of such overnights was done in Skopje region, which is an unfavorable 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, presented in Table 8, enables us to observe the level of domination of environmental characteristics. The Table indicates that the length of stay of foreign tourists in the Republic of Macedonia is relatively short. Such length was around 2.26 in the analyzed period, reflecting significant lagging behind relative to the average length of stay of national tourists. The observation will help us realize the extent to which the length of stay of foreign tourists in the Republic of Macedonia has improved.

1.3 National tourism intensity

Table 10 indicates that the number of national tourists has stagnation characteristics. Namely, during this ten year period, the level of intensity tracked in 1997 was not reached. This by its side 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 1998, reflecting evident stagnation. The results of average length of stay reflect similar relations. Observation of the intensity and dynamics of national tourists' visits shows the extent to which tourist supply has been adapted to the demands of national tourists. Elements of the environment, as attractions for national tourists, should be observed by applying the approach of average stay length in the coming period, too.

Data in Table 11 show that the dominant region in the context of distribution of national tourists is Ohrid and Prespa 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.

Table 12 indicates that the number of overnights is comparable to tourist visits as reflection of the attractiveness of the environment, and thus the highest number of overnights has been recorded in Ohrid and Prespa 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.

- Methodology for data manipulation (measurements):

Number and percentage.

Data specification

Title of the indicator	Source	Reporting obligation
1. Tourism intensity in the Republic of Macedonia 1.1 International tourism intensity 1.2 Overnights of foreign tourists 1.3 National tourism intensity	– State Statistical Office	– Yearly to EUROSTAT – World Tourist Organization (WTO) – Annual tourist review of tourism and other services – Five-year interview of foreign tourists in accommodation establishments





Data coverage (by years):

1.1 International tourism intensity

Table 1: Foreign tourists arrivals by country of origin

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
Total	121.337	156.670	180.788	224.016	98.946	122.861	157.692	165.306	197.216	202.357	1.627.189
Austria	1.713	2.062	2.098	2.559	1.300	1.919	2.564	2.503	2.736	3.490	22.944
Albania	5.489	12.266	21.248	24.747	6.419	9.086	12.088	13.452	16.868	16.188	137.851
Belgium	668	857	2.961	1.759	814	970	1.243	996	1.157	1.414	12.839
Belarus	152	185	562	452	166	154	157	197	188	127	2.340
Bosnia and Herzegovina	1.210	1.278	1.258	1.841	1.377	1.885	2.687	3.648	4.021	4.240	23.445
Bulgaria	20.425	37.566	18.770	27.623	8.484	11.703	14.147	12.156	17.462	17.421	185.757
United Kingdom	2.379	3.792	9.126	6.693	4.357	3.916	4.517	4.049	5.099	5.318	49.246
Germany	5.147	6.071	12.370	10.349	4.860	6.084	6.317	6.522	6.995	7.659	72.374
Greece	9.256	8.148	10.152	21.304	10.637	14.677	27.042	29.901	33.080	30.835	195.032
Denmark	477	662	2.207	2.468	704	786	1.048	1.379	1.165	1.018	11.914
Ireland	556	288	879	672	389	525	482	522	659	991	5.963
Iceland	57	50	128	134	119	153	159	118	125	137	1.180
Italy	3.062	3.727	6.259	4.410	2.511	3.076	3.626	3.618	4.259	4.651	39.199
Norway	421	818	1.921	2.304	885	1.059	1.108	962	1.051	1.277	11.806
Poland	1.116	1.980	779	1.134	725	1.095	1.029	1.233	1.254	1.332	11.677
Portugal	93	161	423	487	226	308	432	331	365	511	3.337
Romania	1.790	1.285	910	1.759	1.101	1.255	1.330	1.144	1.733	1.662	13.969
Russian Federation	2.846	2.887	3.366	3.078	1.647	1.246	1.352	1.487	2.092	1.998	21.999
Slovakia	299	331	514	445	311	481	559	554	554	636	4.684
Slovenia	5.383	5.882	4.606	5.288	2.658	3.837	4.579	5.444	7.514	9.228	54.419
Serbia and Montenegro	30.079	31.112	29.346	35.522	16.429	23.239	27.325	30.771	39.147	38.208	301.178
Ukraine	618	832	622	6.347	3.405	908	706	724	617	641	15.420
Hungary	903	1.261	803	2.372	2.130	1.985	2.173	1.320	1.582	1.835	16.364
Finland	583	730	859	1.278	711	683	768	782	835	885	8.114
France	1.763	2.636	4.735	4.768	2.313	2.542	3.513	2.845	3.017	3.133	31.265
The Netherlands	1.782	2.620	5.953	6.809	1.564	2.016	2.470	2.652	4.218	3.809	33.893
Croatia	4.194	3.199	3.260	4.651	2.609	4.097	5.467	6.828	7.667	8.817	50.789
Czech Republic	744	743	715	1.032	560	927	1.155	905	1.290	2.108	10.179
Switzerland	1.163	1.384	1.723	1.868	934	965	1.485	1.598	1.845	1.924	14.889
Sweden	687	920	1.505	2.033	962	1.082	1.503	1.596	1.854	1.937	14.079
Spain	417	350	1.215	1.286	879	842	1.386	895	1.213	1.154	9.637
Other European countries	1.035	1.222	2.101	3.531	1.734	1.767	2.689	2.911	2.286	2.961	22.237
Australia	981	1.103	967	1.578	586	844	1.187	1.116	1.563	2.014	11.939
New Zealand	55	83	172	200	77	128	99	96	143	264	1.317
Canada	463	831	1.626	1.711	747	776	970	704	851	906	9.585
USA	4.961	7.957	13.900	15.312	7.099	6.997	7.403	7.658	7.588	8.275	87.150
Israel	326	390	342	595	375	430	526	676	1.207	1.170	6.037
Japan	608	1.094	1.301	1.025	419	594	1.076	931	1.041	1.212	9.301
Turkey	5.919	6.135	5.038	6.700	3.101	5.180	5.755	6.496	7.379	7.804	59.507
Other non-European countries	1.517	1.772	4.068	5.892	2.622	2.644	3.570	3.586	3.496	3.167	32.334





Table 2: Arrivals of foreign tourists by transport mode, structure*

Transportation means of arrival	%
Car	47,85
Bus - regular	6,39
Bus - tourist tour	2,88
Motorcycle	0,81
Plane - regular flight	38,83
Plane - charter flight	1,97
Train	1,26

* Based on data from the Interview of foreign tourists, 2004

Table 3: Purpose of stay of foreign tourists, structure *

Purpose of stay in the Republic of Macedonia	%
Vacation and recreation	24,72
Rest during short stay	8,95
Healing purposes	0,75
Business purposes	41,08
Attending congresses	9,17
Religious rituals	0,76
Transit stay	9,6
Stay for round trip	1,54
Other	3,42

* Based on data from the Interview of foreign tourists, 2004

Table 4: Foreign tourists arrivals by 8 statistical regions

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
Total	121.337	156.670	180.788	224.016	98.946	122.861	157.692	165.306	197.216	202.357	1.627.189
Pelagonia region	8.027	7.392	6.760	9.435	4.695	6.464	9.225	11.238	12.550	12.472	88.258
Northeastern region	3.974	5.667	6.624	5.455	845	1.325	985	1.739	2.011	1.580	30.205
Southeastern region	4.966	4.225	4.784	5.268	6.927	5.006	7.792	9.559	16.518	12.696	77.741
Polog region	5.412	7.126	13.959	16.765	6.236	5.013	4.898	7.529	8.506	9.185	84.629
Southwestern region	28.039	55.393	48.893	77.500	15.501	34.234	51.551	53.497	66.226	72.258	503.092
Vardar region	5.392	4.421	3.145	13.141	5.364	3.624	3.323	3.208	3.332	3.894	48.844
Eastern region	1.543	1.682	1.054	1.240	1.075	1.714	1.995	2.330	2.302	3.079	18.014
Skopje region	63.984	70.764	95.569	95.212	58.303	65.481	77.923	76.206	85.771	87.193	776.406

Table 5: Countries with significant share in the number of foreign tourists in the period 1996 – 2006

Country	Tourists
Serbia and Montenegro	301.178
Greece	195.032
Bulgaria	185.757
Albania	137.851
USA	87.150
Germany	72.374
Turkey	59.507
Slovenia	54.419
Croatia	50.789
United Kingdom	49.246
Italy	39.199
The Netherlands	33.893
France	31.265
Bosnia and Herzegovina	23.445
Austria	22.944
Russian Federation	21.999





1.2 Overnights of foreign tourists

Table 6: Overnights of foreign tourists by country of origin

	Total tourists 1997-2006	Total overnights 1997-2006	Average stay of for- eign tourists
Total	1.627.189	3.673.416	2,26
Austria	22.944	48.253	2,1
Albania	137.851	308.279	2,24
Belgium	12.839	24.931	1,94
Belarus	2.340	7.951	3,4
Bosnia and Herzegovina	23.445	52.575	2,24
Bulgaria	185.757	391.148	2,11
United Kingdom	49.246	126.480	2,57
Germany	72.374	188.062	2,6
Greece	195.032	396.171	2,03
Denmark	11.914	25.185	2,11
Ireland	5.963	13.959	2,34
Iceland	1.180	2.273	1,93
Italy	39.199	107.414	2,74
Norway	11.806	27.109	2,3
Poland	11.677	31.345	2,68
Portugal	3.337	6.687	2
Romania	13.969	34.340	2,46
Russian Federation	21.999	66.519	3,02
Slovakia	4.684	10.922	2,33
Slovenia	54.419	108.189	1,99
Serbia and Montenegro	301.178	644.882	2,14
Ukraine	15.420	38.077	2,47
Hungary	16.364	31.449	1,92
Finland	8.114	14.138	1,74
France	31.265	69.769	2,23
The Netherlands	33.893	88.598	2,61
Croatia	50.789	103.205	2,03
Szech Republic	10.179	25.852	2,54
Switzerland	14.889	32.004	2,15
Sweden	14.079	31.701	2,25
Spain	9.637	20.363	2,11
Other European countries	22.237	54.130	2,43
Australia	11.939	29.794	2,5
New Zealand	1.317	2.621	1,99
Canada	9.585	22.444	2,34
USA	87.150	246.401	2,83
Israel	6.037	13.297	2,2
Japan	9.301	20.724	2,23
Turkey	59.507	125.160	2,1
Other non-European countries	32.334	81.015	2,51

Table 7: Overnights of foreign tourists by 8 statistical regions

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
TOTAL	265.524	359.538	474.394	493.867	212.751	274.720	346.200	360.589	442.988	442.845	3.673.416
Pelagonia region	17.262	13.225	10.630	19.653	7.172	11.435	14.708	22.974	31.589	26.676	175.324
Northeastern region	5.264	8.720	7.785	7.600	1.326	2.134	1.661	3.045	3.446	2.939	43.920
Southeastern region	7.377	7.824	7.704	8.994	10.050	8.593	12.143	15.957	27.998	26.107	132.747
Polog region	12.609	17.417	30.006	34.378	11.714	8.335	8.358	14.320	16.824	18.525	172.486
Southwestern region	87.636	154.410	147.493	233.204	40.347	96.323	135.213	141.684	184.048	192.216	1.412.574
Vardar region	8.515	8.861	6.567	20.063	18.592	8.855	7.599	6.514	6.865	7.417	99.848
Eastern region	3.388	3.466	2.232	2.458	2.731	4.343	5.053	6.998	5.579	7.657	43.905
Skopje region	123.473	145.615	261.977	167.517	120.819	134.702	161.465	149.097	166.639	161.308	1.592.612





Table 8: Average stay of foreign tourists

	Total tourists 1997-2006	Total overnights 1997-2006	Average stay of foreign tourists
Total	1.627.189	3.673.416	2,26
Austria	22.944	48.253	2,1
Albania	137.851	308.279	2,24
Belgium	12.839	24.931	1,94
Belarus	2.340	7.951	3,4
Bosnia and Herzegovina	23.445	52.575	2,24
Bulgaria	185.757	391.148	2,11
United Kingdom	49.246	126.480	2,57
Germany	72.374	188.062	2,6
Greece	195.032	396.171	2,03
Denmark	11.914	25.185	2,11
Ireland	5.963	13.959	2,34
Iceland	1.180	2.273	1,93
Italy	39.199	107.414	2,74
Norway	11.806	27.109	2,3
Poland	11.677	31.345	2,68
Portugal	3.337	6.687	2
Romania	13.969	34.340	2,46
Russian Federation	21.999	66.519	3,02
Slovakia	4.684	10.922	2,33
Slovenia	54.419	108.189	1,99
Serbia and Montenegro	301.178	644.882	2,14
Ukraine	15.420	38.077	2,47
Hungary	16.364	31.449	1,92
Finland	8.114	14.138	1,74
France	31.265	69.769	2,23
The Netherlands	33.893	88.598	2,61
Croatia	50.789	103.205	2,03
Czech Republic	10.179	25.852	2,54
Switzerland	14.889	32.004	2,15
Sweden	14.079	31.701	2,25
Spain	9.637	20.363	2,11
Other European countries	22.237	54.130	2,43
Australia	11.939	29.794	2,5
New Zealand	1.317	2.621	1,99
Canada	9.585	22.444	2,34
USA	87.150	246.401	2,83
Israel	6.037	13.297	2,2
Japan	9.301	20.724	2,23
Turkey	59.507	125.160	2,1
Other non-European countries	32.334	81.015	2,51

Table 9: Countries with significant share in ten-year period

	Tourists	Overnights	Average stay by foreign tourists
Serbia and Montenegro	301.178	644.882	2,14
Greece	195.032	396.171	2,03
Bulgaria	185.757	391.148	2,11
Albania	137.851	308.279	2,24
USA	87.150	246.401	2,83
Germany	72.374	188.062	2,6
Turkey	59.507	125.160	2,1
Slovenia	54.419	108.189	1,99
Croatia	50.789	103.205	2,03
United Kingdom	49.246	126.480	2,57
Italy	39.199	107.414	2,74
The Netherlands	33.893	88.598	2,61
France	31.265	69.769	2,23
Bosnia and Herzegovina	23.445	52.575	2,24
Austria	22.944	48.253	2,1
Russian Federation	21.999	66.519	3,02





1.3 National tourism intensity

Table 10: Arrivals and overnights of national tourists

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
Tourists	330.534	418.410	368.842	408.507	234.362	318.851	325.459	299.709	312.490	297.116	3.314.280
Overnights	1.321.622	2.066.923	1.838.748	1.940.772	1.041.831	1.575.664	1.660.667	1.504.845	1.527.053	1.474.550	15.952.675
Average stay	4	4,94	4,99	4,75	4,45	4,94	5,1	5,02	4,89	4,96	4,81

Table 11: Arrivals of national tourists by 8 statistical regions

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
TOTAL	330.534	418.410	368.842	408.507	234.362	318.851	325.459	299.709	312.490	297.116	3.314.280
Pelagonia region	52.200	56.894	59.559	63.679	45.062	56.118	54.464	45.472	46.003	39.498	518.949
Northeastern region	6.150	5.536	4.571	6.299	3.827	3.709	3.555	1.634	1.661	853	37.795
Southeastern region	40.221	23.620	38.120	32.687	26.884	26.613	27.521	34.535	45.333	45.881	341.415
Polog region	31.636	44.992	36.065	36.151	10.579	7.414	11.357	15.150	12.049	12.705	218.098
Southwestern region	144.315	238.926	198.021	219.039	107.808	183.790	189.829	169.453	170.208	160.960	1.782.349
Vardar region	14.881	11.326	7.904	13.803	9.196	10.139	9.429	5.145	4.246	4.327	90.396
Eastern region	7.117	8.233	5.787	7.349	11.687	12.803	6.553	7.516	7.061	8.942	83.048
Skopje region	34.014	28.883	18.815	29.500	19.319	18.265	22.751	20.804	25.929	23.950	242.230

Table 12: Overnights of national tourists by 8 statistical regions

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Total
TOTAL	1.321.622	2.066.923	1.838.748	1.940.772	1.041.831	1.575.664	1.660.667	1.504.845	1.527.053	1.474.550	15.952.675
Pelagonia region	176.788	199.679	204.705	215.011	120.325	187.393	187.716	153.956	147.225	128.785	1.721.583
Northeastern region	11.723	12.348	9.536	11.954	9.535	4.305	4.704	2.639	2.620	1.064	70.428
Southeastern region	211.107	104.520	224.406	152.621	115.686	100.202	156.957	217.781	180.860	191.970	1.656.110
Polog region	76.438	113.409	105.108	99.193	35.503	14.549	31.178	39.130	33.652	35.299	583.459
Southwestern region	750.950	1.554.501	1.238.887	1.378.770	663.758	1.164.009	1.203.809	1.028.797	1.104.087	1.052.271	11.139.839
Vardar region	26.533	21.191	15.528	24.887	28.966	31.802	23.338	11.310	8.985	9.518	202.058
Eastern region	24.558	23.906	15.241	19.301	37.354	42.753	17.040	19.356	14.283	21.277	235.069
Skopje region	43.525	37.369	25.337	39.035	30.704	30.651	35.925	31.876	35.341	34.366	344.129





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	Biological diversity Nature Policies Waste Water Air Transport Soil	Yearly Every five years
		TOUR 33	Overnights spent in tourism accommodations				

Geographical coverage: Republic of Macedonia

Temporal coverage: 1997 - 2006

Frequency of data collection: yearly – every five years

Future activities

■ Short-term activities

a. Description of the activity

- Continuous work of the working group which should include members from tourist association, culture and economy to define the national set of tourism indicators, monitoring of indicators and reporting therewith.

b. Required resources

- Human resources are required in the State Statistical Office.

c. Status

- Activities are in progress.

Deadline: Activities are continuous.





MK – NI 048

TOURISM INTENSITY AND FACILITIES DYNAMICS

Period of indicator assessment

- September 2007 – April 2008

Explanation

- Justification for indicator selection

This indicator includes the number of accommodation units, number of rooms and beds and structure of facilities. The selection of this indicator is justified by the fact that it can track the level of development and receptive development. The number of such establishments should reflect the utilization of the space for tourist purposes, and the number of rooms in accommodation establishments is an indicator of the trend in accommodation intensity. The structure reflects the quality and its trend in accommodation units and establishments.

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.

Units

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

Policy relevance

List of relevant policy documents

- **National Strategy for Tourism Development 2008 - 2012**
- **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 ("Official Gazette of the Republic of Macedonia" No. 62/2004) specifies the conditions and the manner of performing tourist activity (Chapter 15 Services in rural, ethno and eco-tourism, Article 51).

The Law on Environment, the Law on Nature Protection, the Law on Waste Management, the Law on Ambient Air Quality and the **aw 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

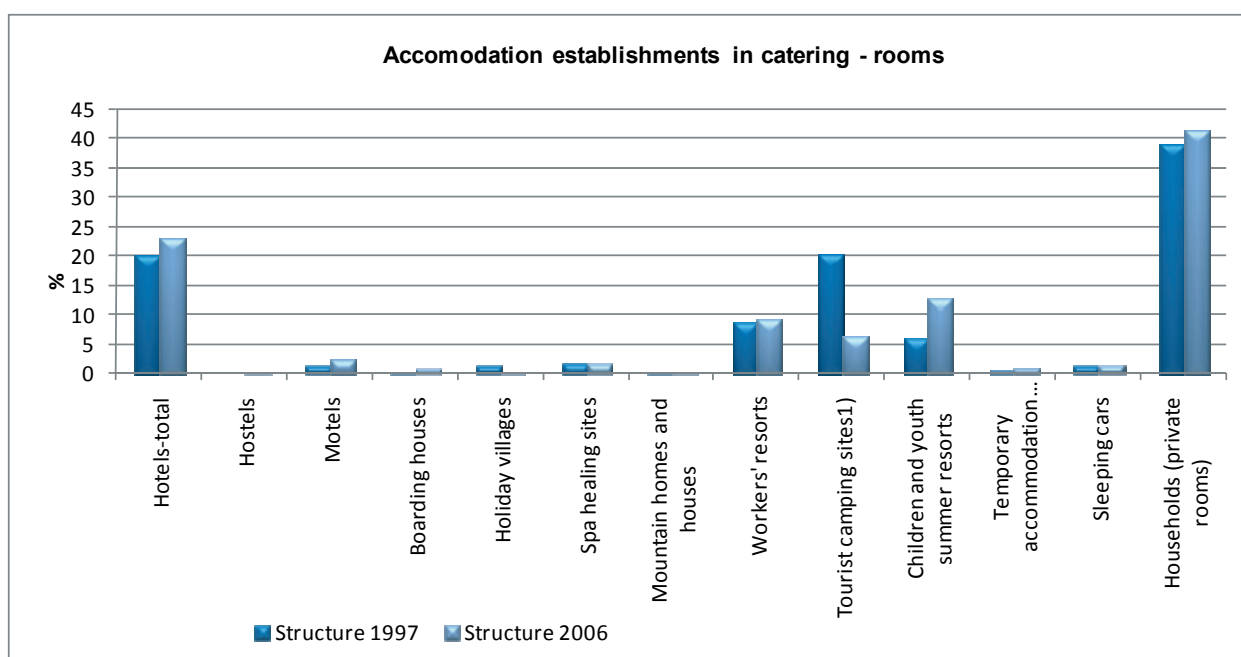
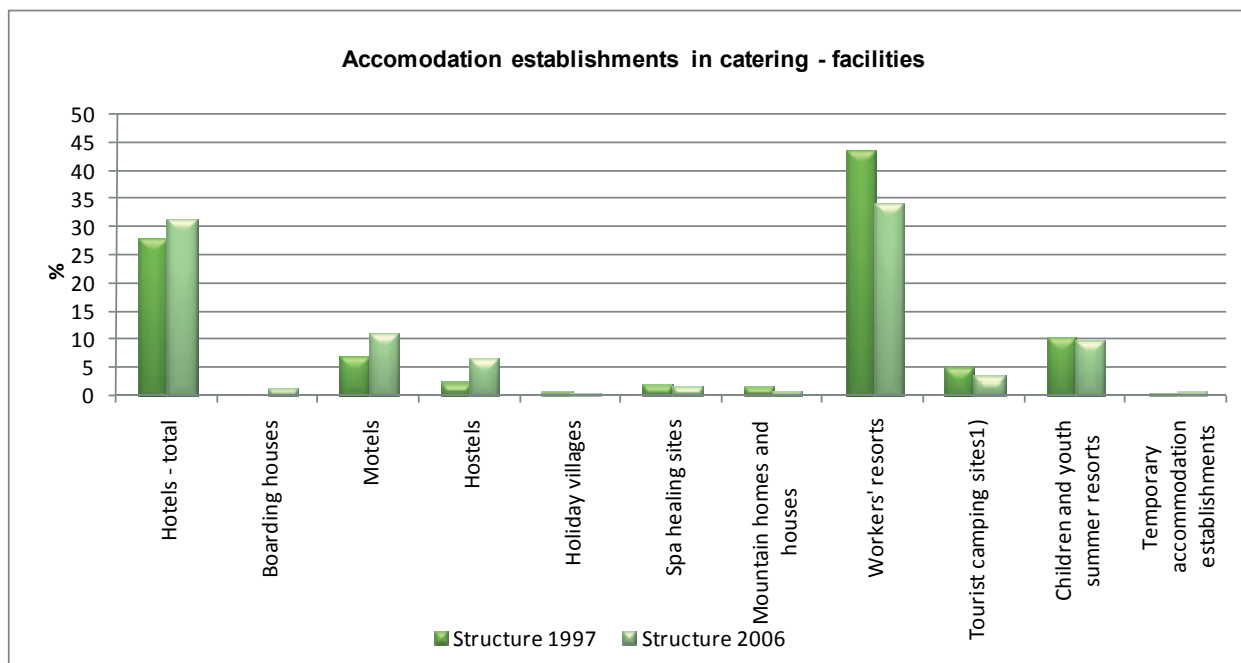
What is the impact of accommodation establishments on the environment?

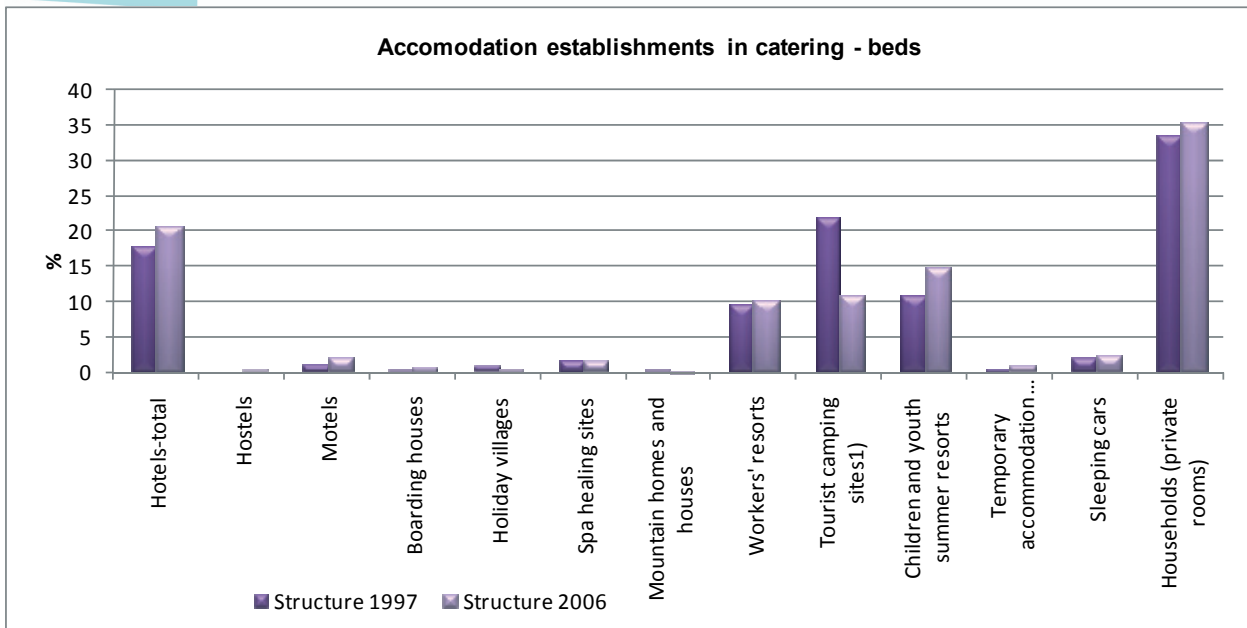
The number of accommodation units may have both positive and negative impacts. Positive impacts are related to proper utilization of the space, and negative impacts are made when the space is occupied by accommodation establishments in inadequate manner.

Key message

To pay attention to the intensity and dynamics of accommodation establishments and the manner of their utilization in the environment. It is particularly important to undertake preventive measures against pollution of waters, air and soil caused by accommodation establishments.







Assessment

Table 1 indicates that the intensity of accommodation establishments as facilities in the analyzed period tracks an increase of around 20%, 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 decrease 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 camping sites. In environmental terms, this is a positive aspect.

Methodology

- Methodology for the indicator calculation

Development trend of accommodation units.

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

- Methodology of data manipulation (measurement):

Number and percentage.

Data specification

Title of the indicator	Source	Reporting obligation
Tourism density and facilities dynamics	– State Statistical Office	– Statistical Yearbook – WTO – EUROSTAT





Data coverage (by years):

Table 1: Accommodation establishments in catering industry – number of facilities – status on 31 August

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Structure 1997	Structure 2006
TOTAL	308	320	332	323	327	334	333	352	347	359	100,0	100,0
Hotels - total	86	90	91	94	98	98	98	107	107	112	27,9	31,2
A category	10	10	11	12	13	12	12	13	14	14	3,2	3,9
B category	60	63	65	68	71	72	73	79	78	83	19,5	23,1
C category	7	7	7	6	6	6	6	7	7	7	2,3	1,9
D category	9	10	8	8	8	8	7	8	8	8	2,9	2,2
Boarding houses	-	-	-	1	2	5	5	5	5	5	0,0	1,4
Motels	21	24	27	29	28	29	30	36	35	39	6,8	10,9
Hostels	7	7	8	11	12	16	17	18	20	23	2,3	6,4
Holiday villages	2	2	2	2	2	2	2	2	1	1	0,6	0,3
Spa healing sites	6	6	6	5	5	5	5	5	6	6	1,9	1,7
Mountain homes and houses	5	5	7	4	4	4	4	4	2	3	1,6	0,8
Workers' resorts	134	137	141	127	126	126	122	125	122	122	43,5	34,0
Tourist camping sites⁹⁾	15	15	15	14	14	13	13	13	12	11	4,9	3,1
Children and youth summer resorts	31	33	34	35	35	35	35	35	35	35	10,1	9,7
Temporary accommodation establishments	1	1	1	1	1	1	2	2	2	2	0,3	0,6

Table 2: Accommodation establishments in catering industry – number of rooms – status on 31 August

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Structure 1997	Structure 2006
TOTAL	28.077	28.476	29.066	27.143	27.242	26.877	27.017	27.222	26.925	26.503	100	100
Hotels-total	5.593	5.677	5.916	5.895	5.961	5.983	5.935	5.989	6.024	6.086	19,90	23,00
A category	1.497	1.497	1.632	1.598	1.616	1.618	1.635	1.661	1.675	1.706	5,30	6,40
B category	3.652	3.711	3.830	3.900	3.948	3.968	3.912	3.914	3.921	3.968	13,00	15,00
C category	204	224	224	176	176	176	174	179	181	178	0,70	0,70
D category	240	245	230	221	221	221	214	235	247	234	0,90	0,90
Hostels	-	-	-	20	33	57	57	64	64	64	0,00	0,20
Motels	352	425	423	435	434	443	491	498	558	627	1,30	2,40
Boarding houses	51	52	59	74	86	118	130	155	151	180	0,20	0,70
Holiday villages	360	360	360	212	212	212	212	212	86	86	1,30	0,30
Spa healing sites	472	472	472	432	432	432	420	423	421	422	1,70	1,60
Mountain homes and houses	29	35	54	33	33	33	33	33	11	17	0,10	0,10
Workers' resorts	2.431	2.484	2.527	2.446	2.455	2.462	2.452	2.544	2.452	2.446	8,70	9,20
Tourist camping sites⁹⁾	5.663	5.603	6.006	3.756	3.756	1.715	1.703	1.720	1.700	1.678	20,20	6,30
Children and youth summer resorts	1.699	1.941	1.922	1.739	1.739	3.739	3.779	3.779	3.690	3.343	6,10	12,60
Temporary accommodation establishments	168	168	168	168	168	168	252	252	250	250	0,60	0,90
Sleeping cars	364	364	364	376	376	376	376	376	372	372	1,30	1,40
Households (private rooms)	10.895	10.895	10.795	11.557	11.557	11.139	11.177	11.177	11.146	10.932	38,80	41,20





Table 3: Accommodation establishments in catering industry – number of beds – status on 31 August

	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Structure 1997	Structure 2006
TOTAL	78.425	78.974	79.203	73.759	74.130	73.985	72.059	72.276	72.637	71.021	100	100
Hotels-total	13.882	14.125	14.564	14.468	14.626	14.629	14.434	14.536	14.369	14.539	17,70	20,50
A category	4.027	4.027	4.297	4.251	4.276	4.249	4.203	4.269	4.229	4.242	5,10	6,00
B category	8.675	8.840	9.043	9.269	9.402	9.432	9.323	9.289	9.132	9.327	11,10	13,10
C category	637	706	706	422	422	422	411	421	423	416	0,80	0,60
D category	543	552	518	526	526	526	497	557	585	554	0,70	0,80
Hostels	-	-	-	46	63	110	110	110	127	109	0,00	0,20
Motels	895	1.035	1.042	1.018	1.013	1.035	1.053	1.089	1.371	1.512	1,10	2,10
Boarding houses	125	121	138	159	184	258	264	308	347	420	0,20	0,60
Holiday villages	574	674	674	456	456	456	436	436	193	193	0,70	0,30
Spa healing sites	1.329	1.329	1.329	1.225	1.225	1.225	1.142	1.142	1.096	1.090	1,70	1,50
Mountain homes and houses	170	177	309	204	204	204	204	204	47	77	0,20	0,10
Workers' resorts	7.612	7.886	7.995	7.561	7.598	7.640	7.336	7.669	7.347	7.221	9,70	10,20
Tourist camping sites ^a	17.006	16.632	16.606	12.608	12.608	8.088	7.845	7.797	7.717	7.773	21,70	10,90
Children and youth summer resorts	8.484	8.647	8.398	7.976	8.115	12.582	11.158	10.908	11.991	10.685	10,80	15,00
Temporary accommodation establishments	304	304	304	304	304	304	528	528	534	534	0,40	0,80
Sleeping cars	1.604	1.604	1.604	1.596	1.596	1.596	1.596	1.596	1.680	1.680	2,00	2,40
Households (private rooms)	26.440	26.440	26.240	26.138	26.138	25.858	25.953	25.953	25.818	25.188	33,70	35,50

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	Biodiversity Nature Policies Waste Water Air Transport	Annually

Geographical coverage: Republic of Macedonia

Temporal coverage: 1997 - 2006

Frequency of data collection: yearly - August

Information on quality (at data level): August in the current year is taken as critical.

Future activities

■ Short-term activities

a. Description of the activity

- Continuous monitoring of the state is necessary.

b. Required resources

- Human resources are required in the State Statistical Office.

c. Status

Activities are in progress.

Deadline: Activities are continuous





MK – NI 049

ECONOMIC VALUE OF TOURISM INDUSTRY

- September 2007 – April 2008

Explanation

- Justification for indicator selection

This indicator should show what are the effects of tourism development, in economic terms, on the environment, and through its share in GDP it will be placed in the context of the overall economic development.

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

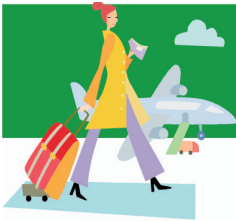
- National Strategy for Tourism Development 2008 - 2012
- National Environmental Action Plan - 2 - in Section 4.2.6. Tourism, describes the main challenge for sustainable tourism development, implementation of economic potential with minimum possible impact on the environment.
- Spatial Plan of the Republic 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 ground

The Law on Tourist Activity ("Official Gazette of the Republic of Macedonia" No. 62/2004) specifies the conditions and the manner of performing tourist activity (Chapter 15 Services in rural, ethno and eco-tourism, Article 51).

The Law on Environment, the Law on Nature Protection, the Law on Waste Management, the Law on Ambient Air Quality and the **aw 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?

Specific policy issue

What is the possibility to invest financial resources in attractive areas of the Republic of Macedonia's environment?

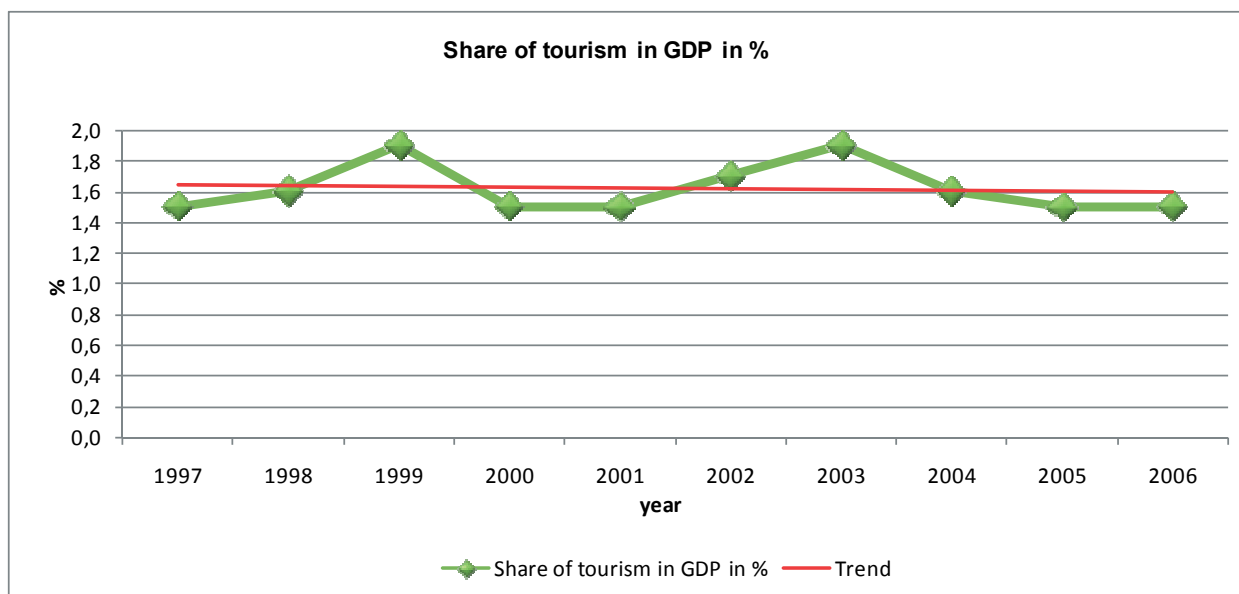
The revenues acquired through tourist charges and taxes will enable environment management and protection, and such revenues will also provide possibilities for legal and natural persons to improve the living conditions and the working performance.

Key message

Tourism is an important economic activity accelerating economic and non-economic activities, while in functional terms it is expressed as multiplier of economic achievements, induces activities, possesses converse character by attributing market nature to phenomena and relations that have no economic meaning; it balances the payment balance of the country, balances development relations in different environments and contributes to the employment.

Increased charges for municipal development will result in humanization of the environment and its protection and promotion.





Assessment

The Table shows that the share of tourism in GDP is relatively low with falling trend. I.e. with no improvement. Observation should enable insight in the extent in which effects from tourist development on the environment improve.

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	– State Statistical Office	<ul style="list-style-type: none"> – Yearly publication on GDP – Statistical Yearbook





Data coverage (by years):

Table 1: Share of the sector “Catering and tourism” or “Hotels and restaurants in Gross Domestic Products (production method).

	Share of tourism in GDP in %
1997	1,5
1998	1,6
1999	1,9
2000	1,5
2001	1,5
2002	1,7
2003	1,9
2004	1,6
2005	1,5
2006	1,5

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	Biodiversity Nature Policies Waste Water Air Transport	Annually

Geographical coverage: Republic of Macedonia

Temporal coverage: 1997 - 2006

Frequency of data collection: annual

Future activities

- **Short-term activities**
 - a. **Description of the activity**
 - Continuous monitoring of the status is necessary.
 - b. **Required resources**
 - Human resources required in the State Statistical Office.
 - c. **Status**
 - Activities are in progress.
- **Deadline:** Activities are continuous.

