

Service sector in terms of changing environment

## Tourism in Macedonia in changing environment

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### Abstract

Contemporary conditions in the tourist industry began to manifest a series of problems in recent decades. As never before numerous events have occurred that not only changed the affinities and tastes of the tourist demand, but also led the tourism offer to focus on new strategies and aspects of operation. The rules of the game have changed to the core with the emergence of more frequent terrorist attacks, economic volatility, weather disasters, new conflict hot spots in the world and so on. Tourism as a specific and complex industry has become too sensitive to such changes. Unlike these and similar external factors that in general have negative impacts on tourism, there have also been changes in the behavior and demands of the tourists themselves. Visiting new and unknown tourist destinations in recent years is becoming a major motivational characteristic of the tourists' decision to engage in the tourist flows. Inevitably is the need of the tourist destinations to adapt to this changing environment. Republic of Macedonia still represents an insufficiently explored destination in tourism terms. It can be concluded that the state of the tourism industry is on a low developed level. The changes that have occurred did not spare even this destination. There exist a number of new methodologies for successful adapting to this situation and achieving of competitive advantage in order to survive on the tourism market. The cluster approach in this sense refers to the use of new methodology. It used for the first time in the strategic formulations. Experience shows that the cluster model can be applied to various forms of tourist activities. Based upon the defined objectives, frameworks and guidelines, several clusters can be differentiated with the use of the criteria of priority. In Macedonia the cluster approach is applied to the rural, cultural, mountain, lake and wine tourism. However, in methodological terms this is an open segment of research that can also be used on other possible forms. Using these global experiences will have a contribution for Macedonia to become one of the countries in which the applicability of this methodology is accepted by all stakeholders. The results show remarkable gains that can be recommended to other spatial units in the country and abroad.

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## 1. Introduction

Republic of Macedonia in its area and population is one of the smallest states in Europe. Its area stretches 25 713 km<sup>2</sup>. There are about two million inhabitants. Although it is a relatively small country, it is characterized by the presence of numerous tourist values. In this area, notably is the presence of natural and anthropogenic attractive values.

The potentials that it possessed as well as its tourist-geographical position represent a basic assumption in the determination of the state to put the tourism industry in priority activities. Tourism development should be aimed at improving not only the economy but also towards tourism and the economy as a whole. Balanced development, underdeveloped spatial entities, vitalization and promotion of attractive values, protection and improvement of the environment in areas of national interest, establishing a cultural attitude towards nature, natural and cultural heritage, raising the educational level of visitors and health-recreational benefits are well-known tourist functions.

The research data in the sense of tourism operations, tourism offer and visits by domestic tourists, but also by foreign guests suggest a great disadvantage of the current state of tourism in Macedonia. The meager achievements in the field of tourism revenues can not be satisfactorily placed in comparative terms with the competing destinations in the region as well as worldwide.

We believe that improving the competitive position of Macedonia and overcoming the existing problems can be achieved through the cluster approach in the strategic plans of the tourism policy makers, as with all involved stakeholders in the region.

## 2. Tourism performance

Differentiation of the statistical regions of the Republic of Macedonia represents one of the changing circumstances in which tourism operates. Even it can be said that it is dominant because it represents a policy of balanced regional development.

Tourism in these changing circumstances has a leading role and it allows utilization of the resources at the highest level of sustainability. The commitments for sustainability are one of the foundations for development in this regard. The performances should be accepted as development indicators in the Republic of Macedonia based on the diversity and abundance of resources and the potential tourism offer.

In 2009, Macedonia has welcome and hosted an overall number of 587 770 tourists, which represents an overall number of 2 101 606 overnights. Even though tourism has not still recovered its attendance level of 2000 (632 523 tourists), it has been in constant progression since the conflicts of 2001, which have had a serious negative impact on tourism performance.

Despite a loss of 2.9% since 2008, considered as a good tourism year (605 320 registered tourists and 2 235 520 overnights), tourism attendance in 2009 remains within the scope of tourism general progression since 2002. The table 1 overleaf shows the tourism attendance progress from 2000 to 2009, in terms of number of tourist accommodation registrations and number of overnights.

Following the regional division of Macedonia into 8 statistical regions, it is possible to draw up a brief overview of the territorial tourism breakdown.

The Table 1 below shows the evolution of tourist arrivals in each of the 8 regions in Macedonia between 2005 and 2009. It reveals a major tourism attendance of the Southwest region (257 480 arrivals in 2009), probably thanks to the tourist attractiveness of the UNESCO City of Ohrid. This region represents twice the tourism attendance of the capital-region of Skopje (131 268 arrivals). The

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