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| 2

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DIMENSIONS OF THE MACEDONIAN TOURIST MARKET (FACTS AND FIGURES) – PREDICTIONS AND PLAN FOR THE FUTURE

| 57

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Abstract

Tourism represents an appropriate phenomenon of the modern civilization. In practice it already takes noticeable place, because it is considered for one of the most massive occurrences ever in the history of the human existence. It is easier to recognize its practical features than to interpret it from a scientific point of view. Exactly this difficulty presents a challenge for its analysis. It has been analyzed from different aspects, and also all the fundamental and applicative research is made in the same way.

Although in Macedonia tourism is not developed at a high level, yet the number of foreign tourists are increasing and with that increasing at the same time it is noticeable the tourism development, so through tourism the Republic of Macedonia begins to show its beauty. For more information about the arrival of foreign tourists in Macedonia, the State Statistical Office has opened a website for anyone who wants to know more than this.

Key words: tourism, Macedonian tourism, tourism dimensions, statistics.

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Introduction

With the increase of the living standards of people, free cash and free time, tourism is beginning to gain in importance in the world scale. More and more people are involved in tourism movements, so that tourism becomes a massive phenomenon. The term foreign tourist means a person with permanent residence outside of the Republic of Macedonia, who temporarily stays in the country and spends at least one night in a hotel or in another type of accommodation for tourists. Tourism in a country depends on the attendance of tourists in it, and thus improves the economy in that state. The effects that are arising from the foreign tourists are important for one economy. Above all, it is about the multiplicative effects. Namely, with the arrival of foreign tourists there are many positive effects on the economy of the host country. The tourist consumption respectively of foreign tourists or the funds that they are spending in that country are circulating in the economy but also and are multiplied.

Specifics of the tourism market

The appearance of tourism, particularly its treatment as an economic phenomenon is associated with the creation of the tourist market. In order to have further information and precisely to acknowledge its essence and specifics, first the general definition that explains the term market should be noted. In the economic literature, there are numerous definitions of the market as an economic category. Without going into a detailed analysis of the different definitions of the market, the one in which the market is defined as “a set of relationships and phenomena between supply and demand in a certain area and in a certain time where taking the role of claimants appear buyers who have the cash and they need products offered by vendors that are on the supply-side” can be singled out.

From this general, leading definition of category market, a definition for a tourist market can be learnt. The tourism market is a created space in which participants meet, intermingle and in a specific way link and mutually determine the tourist offer and the tourist demand. Tourism market always assumes the presence of two market sides, because of the inexistence only of one of them disables the existence of the market relations. “So, the tourism market represents a sum of relationships and phenomena that occur between the tourism offer and tourism demand in order to exchange tourism product at a market price.

This framework definition includes the following constituent elements:

- Tourist offer and tourist demand, i.e. Subjects of the tourism market
- Tourist product i.e. subject to exchange in tourist market
- Price at which the tourism product is marketed.

There are many specifics but as most significant features of the tourism market the ones below are pointed out:

- The tourist offer is created by numerous content and space separated activities that meet the hospitality needs of the single user of the tourist service at different times. As necessity is the need of spatial and temporal synchronization of all participants in the tourist offer.
- Seasonality is a characteristic typical of the tourism market, and general, tourism market is functioning during the winter and summer tourist seasons;
- Because of the non-transferability of the tourist resources, the direction of movement of the tourism product of the tourism market is opposite to the direction of movement of goods on the tourism market. More precisely, tourism demand is the one that heads and moves on to the tourist offer, rather than the opposite classic direction
- The process of tourist services are carried out simultaneously with the process of using them, so there is no possibility of their storage during the low intensity of tourism demand
- As a result of the geographical distance of the tourist offer and demand, are resulting in specific forms of organization and mutual respect of both sides of the tourism market
- The tourism market shows a great resilience to economic barriers that contribute to greater liberalization of tourist movements
- The tourism market is very susceptible to the influence of factors of non-economical nature.

Dimensions of the tourism market

The scope and the dynamics of tourism consumption in the international and domestic tourist turnover show that the dimensions of the tourism market are very large and that they permanently expand. The world tourism market specifically has extended in the period after the Second World War, when the massive tourism character comes to full expression. Quantitative insight into the dimensions of the tourism market in worldwide will fully get into the next part of this study, to analyze the current problems of development of international tourism.

In regards to the dimensions of the domestic tourism, below quantitative data is already given. Based on existing national statistics, it can be

concluded that domestic tourism in most countries has broad dimensions, and that the activities of the tourism economy, oriented towards meeting the needs of domestic tourists, represent important economic activities in those countries.

Depending on that if the tourist trade takes place within the country out of its borders, differs international and domestic tourism market.

The tourism industry in the Republic of Macedonia

Tourism, as a social and economic phenomenon, or economic activity is permanently exposed to constant and powerful changes which are constantly evolving.

However, a large number of people who are staying in those tourist destinations, in addition to positive business results, are leading to certain animal communities, cultural and social consequences which are causing a need for review on the basis of modern tourism. Therefore, for the rapid development of the tourism, the general changes in social structure and social reduced are rising to new observations of tourism.

The number of foreign tourists in Macedonia

When talking about foreign tourists, actually it is spoken about the arrival of the tourists coming from outside Macedonia (incoming tourism). In the table below, the number of the arrival tourists in Macedonia is presented.

Table number 1. The arrival of foreign tourists in Macedonia

| Year | Tourist arrivals |
|------|------------------|
| | Foreign |
| 2000 | 224 016 |
| 2001 | 98 946 |
| 2002 | 122 861 |
| 2003 | 157 692 |
| 2004 | 165 306 |
| 2005 | 197 216 |
| 2006 | 202 357 |
| 2007 | 230 080 |
| 2008 | 254 957 |
| 2009 | 259 204 |
| 2010 | 261 696 |
| 2011 | 327 471 |
| 2012 | 351 359 |
| 2013 | 399 680 |
| 2014 | 425 317 |

Source: State statistical office, Republic of Macedonia.

From this table it can be seen that from 2000 to 2014 the number of foreign tourists in Republic of Macedonia increases significantly, so in 2000 the number of those tourists is 224 016 while in 2014 the number is 425 317.

Number of foreign tourists by the country of origin

The table below displays the number of foreign tourists by the country of their origin.

Table number 2. Number of foreign tourist by country of origin

| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|-----------------|---------|---------|---------|---------|---------|---------|---------|
| FOREIGN | 254 957 | 259 204 | 261 696 | 327 471 | 351 359 | 399 680 | 425 314 |
| Albania | 19 314 | 19 757 | 17 110 | 13 614 | 13 412 | 16 982 | 17 561 |
| Bulgaria | 21 922 | 23 619 | 15 513 | 18 541 | 19 815 | 20 914 | 26 480 |
| Germany | 9 655 | 9 795 | 9 573 | 9 822 | 11 306 | 13 065 | 15 542 |
| Greece | 21 060 | 22 253 | 26 843 | 45 509 | 43 976 | 1 811 | 2 698 |
| Slovenia | 13 159 | 13 970 | 12 606 | 14 063 | 13 252 | 13 404 | 14 486 |
| Serbia | 45 134 | 38 744 | 35 840 | 35 692 | 36 530 | 38 127 | 41 013 |
| Turkey | 15 561 | 16 962 | 20 047 | 39 251 | 50 406 | 68 124 | 63 567 |
| The Netherlands | 5 606 | 4 988 | 6 612 | 22 219 | 27 121 | 25 542 | 26 111 |
| Croatia | 12 302 | 12 519 | 12 791 | 13 885 | 13 939 | 12 722 | 15 392 |

Source: State statistical office, Republic of Macedonia.

From the table we can conclude that the number of foreign tourists by country of origin over the years is drastically changed. In 2008 there were only 254 957 tourists, while in 2014 the number was 425 314. The largest number of tourists in 2014 came from Turkey - 50.406 tourists, Greece, Serbia, the Netherlands, Croatia, Bulgaria, Albania, Slovenia and Germany.

Foreign tourists by types of accommodation facilities

The table number 3 gives insight about the number of tourists by types of accommodation facilities.

Table number 3. Foreign tourists by types of accommodation facilities

| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|--------------------------------|------------|------------|------------|------------|------------|------------|------------|
| Foreign | | | | | | | |
| TOTAL | 254 957 | 259 204 | 261 696 | 327 471 | 351 359 | 399 680 | 425 314 |
| Hotels, total | 206 770 | 214 293 | 225 306 | 294 999 | 314 597 | 361 274 | 377 510 |
| Hotels***** | 53 894 | 55 255 | 61 773 | 84 147 | 81 887 | 88 796 | 89 803 |
| Hotels**** | 76 368 | 61 348 | 59 824 | 93 829 | 107 933 | 133 630 | 148 916 |
| Hotels*** | 17 742 | 34 212 | 39 291 | 62 613 | 73 334 | 86 459 | 96 614 |
| Hotels** | 39 118 | 45 089 | 51 336 | 39 738 | 39 997 | 38 701 | 30 427 |
| Hotels* | 19 648 | 18 389 | 13 082 | 14 672 | 11 446 | 13 688 | 11 750 |
| Boarding houses, total | 2 289 | 2 533 | 2 171 | 1 700 | 1 799 | 1 569 | 1 471 |
| Boarding houses** | 1 590 | 1 495 | 1 195 | 1 116 | 1 107 | 904 | 788 |
| Boarding houses* | 699 | 1 038 | 976 | 584 | 692 | 665 | 683 |
| Motels, total | 608 | 681 | 1 202 | 1 587 | 5 675 | 7 290 | 8 593 |
| Motels***** | - | - | - | - | 1 175 | 1 615 | 1 830 |
| Motels*** | - | - | - | - | 821 | 1 599 | 2 393 |
| Motels** | 408 | 447 | 949 | 1399 | 3 048 | 3 333 | 3 637 |
| Motels* | 200 | 234 | 253 | 188 | 631 | 743 | 733 |
| Overnight lodging houses | 4 162 | 2 296 | 2 806 | 3 018 | 2 301 | 2 599 | 4 075 |
| Spas | 4 727 | 4 087 | 3 723 | 3 869 | 3 454 | 3 683 | 3 707 |
| Mountain lodges and | 7 | 19 | - | 1 | 135 | 429 | 881 |

| | houses | | | | | | | |
|--|---|-------|-------|-------|-------|-------|-------|-------|
| | Workers' vacation facilities | 1 245 | 1 318 | 1 031 | 1 840 | 2 002 | 2 272 | 2 509 |
| | Children and youth vacation facilities | 2 812 | 2 239 | 2 054 | 2 294 | 2 303 | 1 826 | 1 970 |
| | Youth hotels | 2 021 | 2 030 | 1 696 | 1 954 | 1 947 | 1 826 | 1 970 |
| | Camps, uncategorized | 1 070 | 1 881 | 1 959 | 1 880 | 2 523 | 4 793 | 5 732 |
| | Houses, vacation apartments and rooms for rent, total | 3 163 | 3 584 | 2 754 | 3 222 | 3 243 | 2 589 | 3 183 |
| | Temporary lodging facilities | 527 | 1 937 | 650 | 1 032 | 727 | 1 100 | 518 |
| | Sleeping cars | 3 464 | 2 380 | 2 883 | 892 | 1 098 | 1 748 | 4 996 |

Source: State statistical office, Republic of Macedonia.

From the table above it can be noted that there is an increase in the number of foreign tourists who come from those places. In 2008 there was the lowest number of tourists with a total of 254 957, than in 2009 this number has increased to 259 204, than in 2010 with a total of 327 471, in 2012- 351 359, in 2013- 399 680 and the largest number of tourists in 2014 with a total of 425 314.

In contrast to other accommodation facilities, the highest growth was registered in hotels, in 2008 with a total of only 206 770 tourists, while the largest number of tourists was registered in 2014 with a total of 377 510. Then follow the boarding houses, but here a decline of the tourists from 2008 to 2014 is noted. According to this table the motels also show increasing number of tourists over the years. The decline is present in the inns, resorts, summer camps, hostels and so on.

Number of foreign tourists in the Republic of Macedonia by months

In this table the number of foreign tourists by months in Macedonia is shown. It is taken in a period of 14 years, from 2000 to 2014, separately for each month.

Table number 4. Number of foreign tourist in Republic of Macedonia by months (2000 – 2014)

| | всупно | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | XII |
|------|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 2000 | 224 016 | 12 535 | 15 361 | 19 263 | 17 420 | 22 993 | 19 624 | 22 196 | 22 715 | 20 483 | 19 415 | 16 233 | 15 778 |
| 2001 | 98 946 | 11 783 | 12 523 | 13 322 | 7 976 | 9 123 | 7 106 | 5 177 | 4 614 | 6 228 | 7 028 | 7 534 | 6 532 |
| 2002 | 122 861 | 6 370 | 7 761 | 9 232 | 8 643 | 10 236 | 11 207 | 12 389 | 11 138 | 10 954 | 12 079 | 12 295 | 10 557 |
| 2003 | 157 692 | 8 061 | 8 519 | 11 723 | 12 171 | 15 510 | 14 933 | 15 777 | 16 597 | 15 066 | 16 023 | 11 662 | 11 650 |
| 2004 | 165 306 | 7 873 | 11 381 | 11 588 | 13 457 | 16 671 | 15 276 | 16 883 | 14 666 | 16 011 | 17 468 | 11 508 | 12 524 |
| 2005 | 197 216 | 9 729 | 10 816 | 16 809 | 15 961 | 17 273 | 20 292 | 19 857 | 19 543 | 18 177 | 20 019 | 15 776 | 12 964 |
| 2006 | 202 357 | 9 704 | 10 045 | 15 456 | 17 597 | 20 154 | 20 230 | 20 574 | 21 391 | 20 740 | 17 746 | 14 058 | 14 662 |
| 2007 | 230 080 | 10 095 | 11 345 | 15 756 | 18 318 | 22 213 | 21 706 | 25 062 | 26 098 | 23 739 | 21 292 | 16 726 | 17 730 |
| 2008 | 254 957 | 13 326 | 13 188 | 16 444 | 17 015 | 20 088 | 23 339 | 26 175 | 30 551 | 27 408 | 24 381 | 16 968 | 19 474 |
| 2009 | 259 204 | 14 418 | 14 247 | 17 176 | 19 156 | 27 562 | 27 956 | 28 951 | 29 721 | 27 258 | 22 840 | 15 476 | 14 483 |
| 2010 | 261 696 | 12 264 | 13 277 | 14 769 | 19 409 | 28 401 | 27 220 | 28 738 | 32 231 | 28 144 | 23 504 | 18 229 | 15 510 |
| 2011 | 327 471 | 14 067 | 15 242 | 19 434 | 23 245 | 34 315 | 33 767 | 39 271 | 40 130 | 38 015 | 31 782 | 21 079 | 17 124 |
| 2012 | 351 359 | 17 903 | 14 351 | 19 243 | 26 586 | 37 340 | 39 873 | 42 871 | 41 695 | 41 097 | 33 122 | 20 512 | 16 766 |
| 2013 | 399 680 | 16 373 | 15 390 | 22 776 | 27 784 | 44 851 | 46 303 | 47 290 | 49 123 | 46 841 | 41 483 | 20 876 | 20 290 |
| 2014 | 425 314 | 16 340 | 16 021 | 22 153 | 28 077 | 50 693 | 51 498 | 51 988 | 57 373 | 49 213 | 39 762 | 22 246 | 19 950 |

Source: State statistical office, Republic of Macedonia.

From this table it can be seen that from 2000 to 2014 the number of tourists increases every year, with a decline of the number of foreign tourists only in 2001, but this decline is not worrying because this negative result is because of the war that took place in Macedonia. The largest number of tourists is evident in July and August. From this table it can be concluded that the visits of foreign tourists is solid because over the months the number is amounted to over 10 000.

Number of foreign tourists in Macedonia to places

This table shows the number of foreign tourists who are coming from different places in Macedonia, and for that purpose the following places and regions shown in the table are taken into consideration.

Table number 5. Number of foreign tourist in Republic of Macedonia, by places

| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
|---------------------------|------------|------------|------------|--------|------------|------------|------------|
| FOREIGN | 254 957 | 259 204 | 261 696 | 327471 | 351 359 | 399 680 | 425 155 |
| Skopje | 113 963 | 107 962 | 110 365 | 125407 | 134 217 | 149 027 | 161 555 |
| Spa areas | 5 189 | 4 307 | 3 886 | 4040 | 3 604 | 4 025 | 3 998 |
| Mountain areas | 7 500 | 12 354 | 13 287 | 13209 | 13 733 | 16 130 | 16 732 |
| Other tourist areas | 85 195 | 89 662 | 82 135 | 104083 | 113 328 | 139 453 | 149 755 |
| Other areas | 43 110 | 44 919 | 52 023 | 80732 | 86 477 | 91 045 | 93 274 |

Source: State statistical office, Republic of Macedonia.

From the table it can be observed that in the period of 7 years, from 2008 to 2014 the total number of foreign tourists by places increases dramatically. The lowest number of tourists was in 2008 with a total of 254 957 tourists, while the largest in 2014 with a total of 425 155 tourists.

The largest number of visitors is expressed in Skopje with a total of 113 983, while in 2014 was 161 555. Than follows the mountain areas with the largest number of visits in 2014. On the other hand, in the spa places there is a decline in the same period taken from 2008 to 2014.

Number of arrivals of foreign tourists by regions

This table includes: Vardar region, east region, southwest region, southeast region, Pelagonia, Polog, Northeast region and Skopje.

Table number 6. Number of foreign tourist in R. of Macedonia by regions

| | Foreign | | | | | | |
|------------------|---------|---------|---------|---------|---------|---------|---------|
| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
| TOTAL | 254 957 | 259 204 | 261 696 | 327 471 | 351 359 | 399 680 | 425 314 |
| Vardar region | 4 599 | 5 385 | 6 406 | 8 539 | 11 396 | 13 076 | 15 200 |
| Eastern region | 4 509 | 4 545 | 4 591 | 5 667 | 6 590 | 7 165 | 8 729 |
| Southwest region | 83 007 | 87 353 | 79 934 | 101 869 | 110 469 | 134 806 | 144 227 |
| Southeast region | 21 139 | 22 582 | 25 453 | 50 204 | 48 217 | 50 005 | 50 636 |
| Pelagonia region | 13 286 | 11 838 | 14 166 | 15 085 | 19 632 | 20 677 | 20 994 |
| Polog region | 9 222 | 14 096 | 14 478 | 12 957 | 12 786 | 15 332 | 13 257 |
| Northeast region | 2 099 | 2 124 | 2 005 | 2 424 | 3 280 | 3 728 | 4 234 |
| Skopje region | 117 096 | 111 281 | 114 663 | 130 726 | 138 989 | 154 831 | 168 037 |

Source: State statistical office, Republic of Macedonia.

As in the previous tables, here it can also be mentioned that the number of foreign tourists in Macedonia has increased in the period from 2008 to 2014. The total number of all regions in 2008 was 254 957 and in 2014 it was 425 314. The largest number of foreign tourists in all this years is expressed in the region of Skopje with more than 100 000, while the lowest number is expressed in the Northeast region with less than 5 000 tourists.

Number of nights spent by foreign tourists in Macedonia

It is not important only the attendance by foreign tourists in Macedonia, but also of great importance are the nights spent in this country, because with that the country itself has a profit from it, and this is improving and developing the accommodation capacities too.

Table number 7 shows the results of the total number of overnight stays in the period from 2000 to 2014.

Table number 7. Nights foreign tourist spend in Republic of Macedonia

| Year | Tourist overnights |
|------|-----------------------|
| | Foreign |
| 2000 | 493 867 |
| 2001 | 212 751 |
| 2002 | 274 720 |
| 2003 | 346 200 |
| 2004 | 360 589 |
| 2005 | 442 988 |
| 2006 | 442 845 |
| 2007 | 518 088 |
| 2008 | 587 447 |
| 2009 | 583 796 |
| 2010 | 559 032 |
| 2011 | 755 166 |
| 2012 | 811 746 |
| 2013 | 881 375 |
| 2014 | 922 513 |

Source: State statistical office, Republic of Macedonia.

Concluded in the period of 14 years or from 2000-2014 an increasing of these tourists is more than visible.

Number of nights spent by foreign tourists by regions

This table includes the following regions:

Table number 8. Nights spent by foreign tourist by regions

| Foreign | | | | | | | |
|---------------------|------------|------------|------------|------------|------------|------------|------------|
| | 2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 |
| TOTAL | 587 447 | 583 796 | 559 032 | 755 166 | 811 746 | 881 375 | 922 513 |
| Vardar region | 7 839 | 10 487 | 13 207 | 15 473 | 19 662 | 24 646 | 27 661 |
| Eastern region | 10 312 | 11 767 | 11 183 | 13 238 | 16 428 | 17 235 | 21 944 |
| Southwest region | 249 315 | 248 963 | 219 300 | 328 718 | 362 163 | 388 863 | 401 223 |
| Southeast region | 43 811 | 43 810 | 42 133 | 94 474 | 86 113 | 95 409 | 96 917 |
| Pelagonia region | 26 746 | 25 260 | 32 190 | 37 088 | 47 998 | 50 115 | 55 811 |
| Polog region | 19 085 | 24 991 | 26 299 | 23 126 | 24 047 | 30 846 | 24 744 |
| Northeast region | 3 243 | 3 466 | 3 922 | 4 829 | 6 105 | 5 691 | 6 2006 |
| Skopje region | 227 096 | 215 052 | 210 798 | 238 220 | 249 230 | 268 570 | 288 007 |

Source: State statistical office, Republic of Macedonia.

From the included regions it can be seen that in 2008 the number of overnight stays of foreign tourists by regions is 587 447, and it is much smaller than 2014, with a total number of 922 513 tourists. The most visited region is Skopje, while with a lowest number of foreign tourists is the Northeast region with an average around 4000 tourists took in all 7 years.

Conclusion

As a phenomenon of the new era, tourism is becoming more and more important for the Macedonian economy as well. Having this in mind, and after consulting the relevant statistics it can be concluded that this field is of utmost importance for Macedonia. The development and investments in tourism are more than needed in order to attract more tourists and to have that multiplication effect in the economy. One of the possibilities in that manner is to start cooperation with both national and international parties which are heavily involved in this field and to work together to establish well known product(s) by which Macedonia will be known for. Having this in mind, and after referring to the important forms of tourism that Macedonia can offer, it is very clear that the road to success will be

paved by proper development and management of these forms of tourism.

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