TOURIST LENGTH OF STAY: CHALLENGES FOR OHRID (NORTH MACEDONIA)

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ABSTRACT

This paper analyzes the stay patterns of tourists visiting Ohrid, the most famous tourist destination in North Macedonia. It reveals critical insights into seasonal tourism dynamics from 2000 to 2024. Using standard statistical calculations, the study assesses the average length of stay for domestic, foreign, and total tourists, alongside monthly variations and long-term trends. Results indicate a clear decline in the average length of stay for all categories relative to the average period, particularly after 2012. A slight a year-on-year peak appeared among foreign tourists in 2021, representing a post-COVID recovery that briefly exceeded the average. Domestic tourists stay significantly longer on average (5.68 days) than foreign tourists (2.53 days), likely due to familiarity and proximity, while the total average of 4.51 days, tends to mask the sharper drop among foreigners. A deeper monthly analysis uncovers distinct seasonal patterns: while summer months (July and August) drive peaks for both groups, domestic tourists exhibit 2.5 times higher (142% longer stays) than foreign visitors. Conversely, spring, autumn, and winter months maintain brief stays of 2 days or less, confirming Ohrid's profile as a summer-oriented destination. Theoretically, this study integrates length-of-stay metrics into the tourism seasonality theory. Empirically, the findings assist local governance to incorporate the destination's dual-market insights when creating tourism development plans aimed at extending foreign stays and balancing domestic seasonal peaks.

Keywords: Length of stay, Tourism, Ohrid, Tourism planning.

INTRODUCTION

Ohrid, North Macedonia, is the most famous summer tourist destination in the country, attracting a diverse mix of domestic and international visitors. It is a UNESCO mixed transboundary World Heritage site, recognized for both its natural and cultural significance [21, 22]. In 2024, Ohrid accounted for nearly one-third of national tourist arrivals (363,718) and overnights (1,194,516) [20], demonstrating that tourism is a vital sector for both the local and national economies.

However, despite a consistent increase in total tourist arrivals, tourism in Ohrid has experienced a decline in the average length of stay (LOS). This trend is evidenced in broader literature [1, 2, 4, 8, 11] with a consensus that LOS is a critical metric for quantifying tourism impact on economic development and regional planning [3, 5, 6, 9]. The global trend toward 'stay compression', where tourists take more frequent but shorter trips, presents a significant challenge for destination management [15]. While arrival numbers may remain high, the shortening duration of the visits threatens the depth of economic impact and local sustainability [1]. The 'summer-peak' phenomenon is particularly evident in lake-based destinations and carries numerous economic risks [10],

attracting more domestic tourists who tend to stay longer due to their proximity to the destination opposite to foreigners [14].
This study investigates stay patterns in Ohrid from 2000 to 2024 to determine how global trends manifest locally. Given that the sampled period is characterized by both steady growth and a consistent decline in the average LOS starting after 2012, this research aims to disaggregate the data between domestic and foreign tourists. In doing so, it reveals the 'dual-market' dynamics that are often hidden by aggregate statistics.
Furthermore, the objective of this paper is to integrate these LOS metrics into the broader framework of tourism development of Ohrid, specifically addressing the challenges of seasonality [16] and the destination's shifting role as a transit destination for foreign tourists [13]. By providing detailed longitudinal analysis, this research offers empirical evidence to assist local governance in creating development plans that aim to extend foreign stays and balance extreme domestic seasonal peaks.
Following the introduction, the paper is organized as follows: Section 2 outlines the methodology, while Section 3 presents the main results and discussion. Finally, the paper concludes with a summary of key findings, research limitations, and suggestions for future work.

METHODOLOGY

The research employs a quantitative longitudinal approach, analyzing a 25-year sample period from 2000 to 2024. To gain a more in-depth understanding of the long-term trends in Ohrid's tourism lifecycle, the study employs a comparative period analysis wherein the data is split into two sub-periods: 2000-2011 and 2012-2024. This division is based on 2012 being identified as a structural break point.
The data is limited to registered accommodation providers sourced from [20], ensuring high reliability and official standing. The primary metric utilized is the LOS, calculated based upon equation (1):

$$LOS = \frac{Total\ overnights}{Total\ tourist\ arrivals} \qquad (1)$$

The analysis specifically segments tourists into domestic and foreign categories. This is important to prevent the 'masking effect', a statistical phenomenon occurring when analyzing total tourist data where high domestic averages obscure a significant collapse or high volatility in foreign stay durations.
LOS is recognized as a critical indicator of a destination's economic development and managerial efficiency [6]. Unlike tourist arrival figures, which merely quantify volume, LOS provides a deeper measurement of the 'depth' of destination consumption and the overall quality of the tourism product.

RESULTS AND DISCUSSION

The findings revealed a clear divergence between market segments in Ohrid, which is rooted in robust seasonality. Figure 1 illustrates the disparity between domestic and foreign tourists by comparing average LOS curves, where the total average LOS curve serves as a baseline for conclusions.

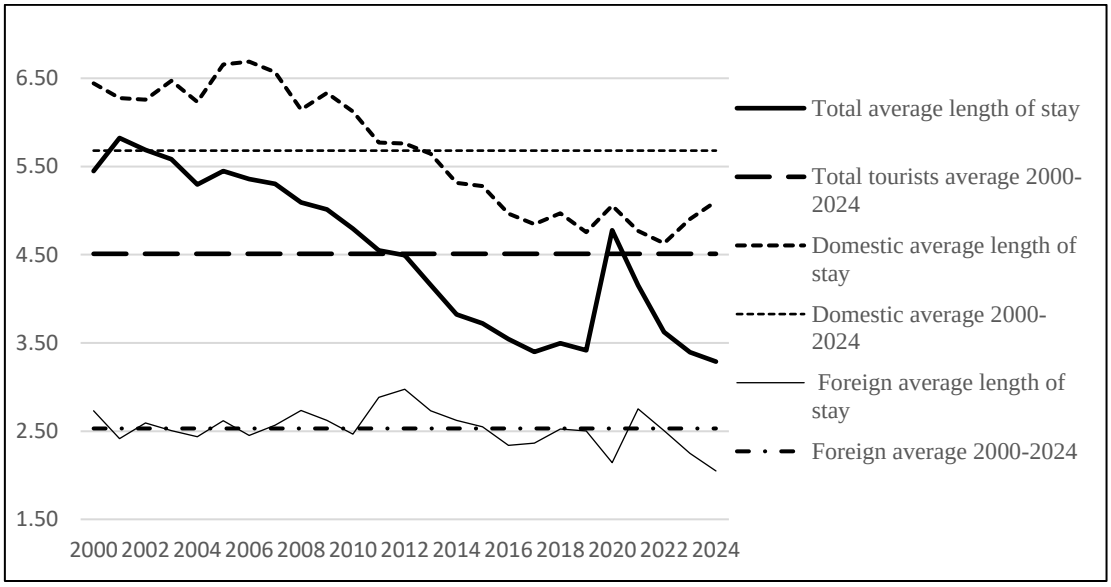

Figure 1. Comparing average LOS in Ohrid, 2000-2024 (in days)
Source: Author's calculations on [20]

From Figure 1, it is noticeable that domestic tourists maintained a significantly higher average stay of 5.68 days, while foreign tourists averaged only 2.53 days. While the total combined average stands at 4.51 days, this acts as a deceptive 'masking' metric that obscures the sharper decline and high volatility observed within the foreign market. By plotting domestic and foreign behaviors side-by-side, Figure 1 highlights a structural gap suggesting that Ohrid maintains a stable domestic base in contrast to a highly transient foreign trend.

This finding suggests that Ohrid has completely divergent triggers in tourism supply when attracting tourists. The two markets differ not just in volume, but in fundamental perception as well. Domestic tourists generally visit Ohrid during summer for 'sun and lake' tourism. On the other hand, foreigners stay for very short periods, treating the destination as a transit node, thereby confirming the findings of [13].

Furthermore, Figure 1 reveals another interesting finding that Ohrid is a destination in transition. Namely, while the total LOS appears relatively stable at first glance, a critical point is noted after 2012, when a long-term decline commenced. This shift may be attributed to the changing profile of regional tourism, where increased accessibility to competing Mediterranean destinations and the rise of low-cost air travel have influenced visitor stay patterns. The specific market dynamics are further elucidated by isolating the behaviors of each group, i.e., domestic, foreign, and total tourists.

Figure 2 highlights the relative stability of the domestic market as a constant base for the local economic development of Ohrid. During the sampled period, domestic tourists accounted for an average of 61% of arrivals and 76% of overnights. Due to the famous Lake Ohrid, domestic tourists primarily visit for recreational purposes, reaching an average stay nearly double that of foreign tourists. This stability suggests a high degree of brand loyalty among domestics, who perceive Ohrid as a reliable, stationary summer destination.

Figure 2 also illustrates the same downward trend starting in 2012 that was previously noted in Figure 1, further supporting the characterization of Ohrid as a destination in transition. Although the total LOS may appear relatively stable at first glance, a critical turning point occurred after 2012, marking the beginning of a long-term decline. While

the average LOS for domestic tourists over the entire sampled period was 5.68 days, the 2012 break point initiated a substantial reduction. Specifically, the average LOS for the 2000–2011 sub-period was 6.33 days, which is 11.4% higher than the 2000–2024 baseline average. In contrast, the average for 2012–2024 fell to 5.08 days, or 10.6% below the baseline. A direct comparison between these two sub-periods reveals a decline of nearly 20%, as the stay shortened from 6.33 to 5.08 days.

Such a loss of 1.25 days necessitates a serious analysis of the underlying causes of this shortening of stay. From a destination management perspective, this contraction suggests that while Ohrid remains a primary choice for domestic travelers, the 'depth' of their consumption is eroding. This may be driven by shifting economic constraints on domestic households or a transition toward more frequent but shorter weekend trips.

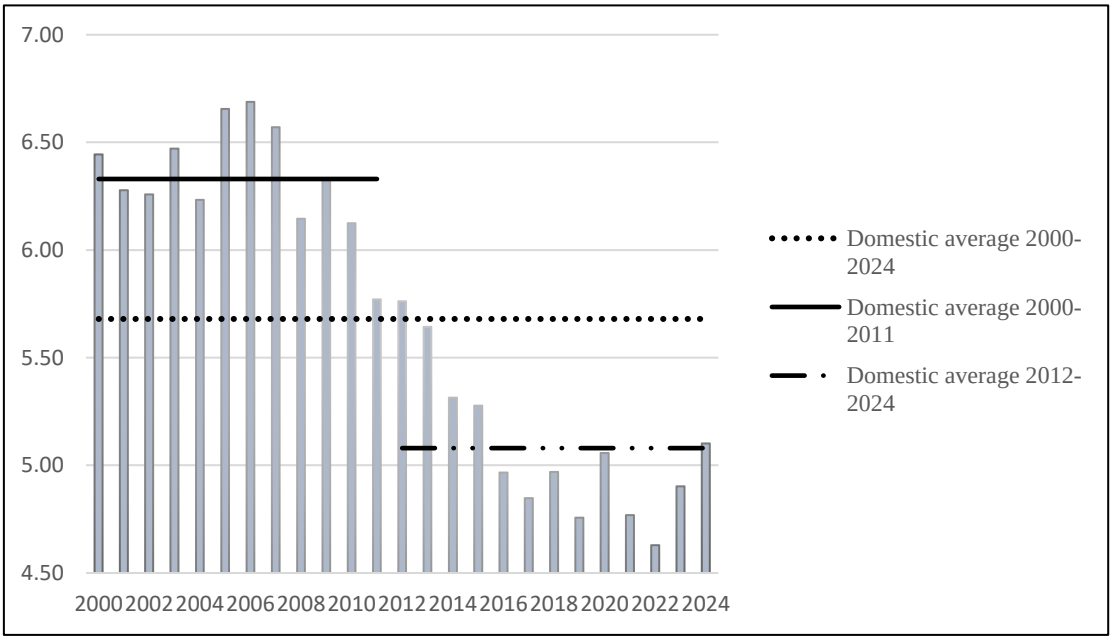

Figure 2. Domestic tourists average LOS in Ohrid, 2000-2024 (in days)
Source: Author's calculations on [20]

In stark contrast, Figure 3 tracks the volatility of the foreign market, showing a similar trajectory between the two sub-periods. Figure 3 captures a significant peak in 2021, interpreted as a 'rebound effect' following the COVID-19 pandemic [12], during which foreign tourists, predominantly regional travelers, stayed longer. However, this spike did not last long as the foreign average returned to its downward path as soon as global travel corridors reopened. This confirms that foreign stays are increasingly 'thinning,' as visitors remain only long enough to visit the Old Town before continuing their holidays in neighboring countries such as Albania or Greece.

Unlike Figure 2, which illustrates a large discrepancy between the LOS of domestic tourists across the two sub-periods, Figure 3 does not reveal such a significant gap. There was only a 2% decline in LOS for the 2000–2011 period compared to the baseline (2000–2024), where the LOS decreased from 2.59 to 2.53 days. The second sub-period noted an identical decline of 2%, from the 2.53-day baseline to 2.48 days. A cumulative drop of 4% in foreign tourism demand does not imply a serious reduction in LOS over these

periods. Nevertheless, this trend indicates a necessity for a clearer definition of Ohrid's brand image to strengthen its position within the international tourism market.

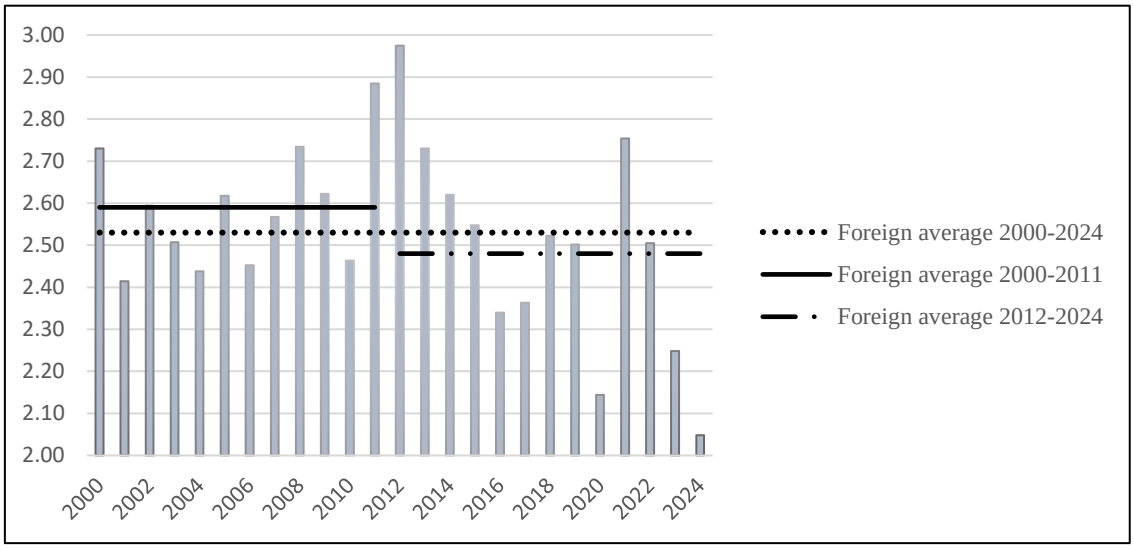

Figure 3. Foreign tourists average LOS in Ohrid, 2000-2024 (in days)
Source: Author's calculations on [20]

Figure 4 illustrates the cumulative impact of domestic and foreign arrival trends by displaying the total average LOS. This visual is important as it clearly demonstrates the 'masking effect,' wherein the significantly longer domestic stays hide the marginal contribution of foreign stays. Specifically, the total average LOS remains high enough to obscure the fact that the foreign market is effectively eroding. If local authorities rely solely on this aggregate figure, they risk overlooking Ohrid's critical transition into a transient node for international tourists [23].

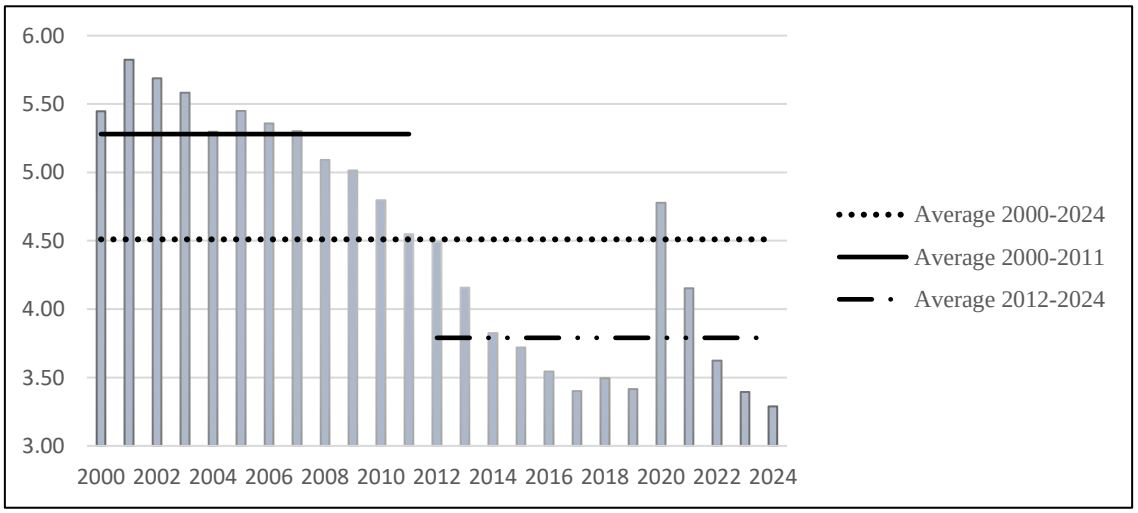

Figure 4. Total average LOS in Ohrid, 2000-2024 (in days)
Source: Author's calculations on State Statistical Office (n.d.)

Finally, Figure 5 provides an explanation for the 'masking effect', outlined previously in Figure 4, by presenting the monthly distribution of the average LOS for domestic and foreign tourists. It clearly visualizes the extremely high concentration of domestic tourism demand during the peak summer months of June, July, and August vis-à-vis the moderate

demand from foreign tourists. These three months encompass almost 70% of total domestic arrivals and 88% of overnights, in contrast to a modest foreign share.

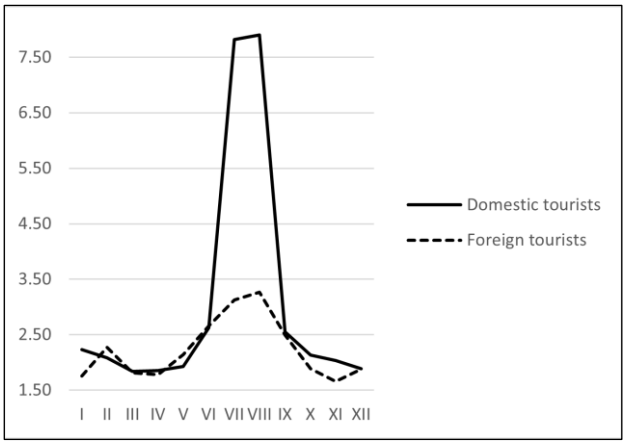

Figure 5. Average domestic vs foreign LOS per month, 2000-2024
Source: Author's calculations on [20]

Seasonality remains the dominant driver of these figures, with domestic stays in peak months being 142% longer (2.5 times higher) than foreign stays. During the 'shoulder' and winter seasons, however, stays for both groups drop to two days or less, confirming Ohrid's rigid profile as a single-season destination [7]. Theoretically, these findings validate tourism seasonality theory while adding a layer regarding market segmentation [1]. The data suggests that seasonality affects not just visitor volume, but the very nature of the stay itself.

CONCLUSION

The study investigates the stay patterns of tourists visiting Ohrid from 2000 to 2024, concluding that the destination faces two major challenges:

1. A strong dual-market divergence between domestic 'vacationers' and foreign 'passers-by'. These necessities address the decline in the average LOS observed since 2012 and create strategies to extend foreign stays.
2. Deep-rooted seasonal dynamics. This requires smoothing the massive peaks when domestic tourists stay 142% longer than foreigners.

Analysis of total average LOS reveals that it is heavily buoyed by domestic tourists. When analyzing seasonal dimension, it was found that summer months exhibit dominant domestic demand, while stays in the shoulder and winter seasons drastically collapse. This gap indicates that domestic visitors treat Ohrid as a primary summer destination for long vacations, whereas foreigners view it as a transient stop within a broader regional itinerary.

These results urge a need for policy intervention and developing local tourism development plans to bridge these gaps and mitigate discrepancies. The study recommends active destination management and tourism planning along with activities to diversify off-season offerings. Furthermore, the detected decline since 2012 suggests that mass arrivals have pushed the destination to 'fast tourism' practicing quantity over quality and neglecting sustainable development. To address these structural challenges, local governance should consider shifting the global outlook of Ohrid from 'mass

tourism' toward 'niche' products. Mass tourism continues to provoke negative impacts such as urban degradation [17], overcrowding [18], and the disruption of residents' quality of life [19].

Strategically, adding new experiences, such as hiking in Galichica National Park or religious heritage tours, may better position Ohrid within regional frames, so tourists can add an extra night to their itinerary As the LOS drops significantly outside of summer, focus must shift to shoulder-season programming and adding extra activities beyond peak months that favor longer stays in the destination.

The study has certain limitations that must be acknowledged. First, it relies primarily on official statistical data regarding registered overnights, which may not fully account for unregistered ('ghost tourists') in private accommodations. Second, the research does not capture qualitative motivations for the stay or departure. Future research could also incorporate visitor surveys to triangulate these findings with psychographic insights, providing a deeper understanding of the development of both domestic and foreign tourism markets in Ohrid.

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