BUILDING TOURISM CAPACITIES IN BELGRADE IN THE (POST) CRISIS PERIOD[5]

СОЗДАНИЕ ВОЗМОЖНОСТЕЙ ДЛЯ ТУРИЗМА В БЕЛГРАДЕ В (ПОСТ) КРИЗИСНЫЙ ПЕРИОД

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Summary: *Based on presence and diversity of number of natural and social resources, generally Serbia possesses very good potentials for intensive tourism development. Beside mountain and spa tourism, in last few decades Belgrade has been grown into the unavoidable destination, as for domestic as well as for international tourists.Main goal of paper is to analyse current state of tourist industry in Belgrade city, and to show that, after crisis period, it can and has to play more significant role in actual economy rebuilt. Moreover, it is expected that larger investments in tourism of Serbian capital will be economically sustainable in long term period, as it is well known that developed tourism can successfully fill in the city and national budget*

Keywords: *tourism capacities, Serbia, Belgrade.*

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5 This paper is a part of research in the projects: III 46006, 179015 and 179001, financed by the Ministry of Education, Science and Technological Development of the Republic of Serbia. Project period 2011–2014.

Аннотация: *Основываясь на наличии и разнообразии большого количества природных и социальных ресурсов, Сербия в целом имеет очень хороший потенциал для интенсивного развития туризма. Кроме горного и спа-туризма, в последние десятилетия Белград прекратился в туристическое направление, обязательное к посещению как для местных, так и для иностранных туристов. Основной целью данной статьи является анализ современного состояния туристской отрасли Белграда, а также демонстрация факта, что в посткризисный период она может и должна играть более существенную роль в восстановлении экономики. Более того, ожидается, что растущие инвестиции в туризм в столице Сербии будут экономически устойчивыми в долгосрочной перспективе, так как известно, что развитый туризм может успешно служить источником дохода для городского и национального бюджетов.*

Ключевые слова: *туристские возможности, Сербия, Белград.*

INTRODUCTION

Tourism is one of the substantial sectors of the Serbian economy, as it has great influence on GDP creation, employs large contingent of working population, affects balanced regional development and improves the country's balance of payment through the silent export and attraction of foreign direct investments. It is based on widely available natural resources, rich cultural and historical heritage, proper physical and social infrastructure and satisfactory accommodation and catering facilities (Jeločnik et al., 2013).

Despite generally known potential role of tourism as an initiator of overall socio-economic development, unfortunately, over the last few years it has been faced with dominant obstacle in Serbia – the lack of available investors that will refresh the existing and create new tourist contents.

Turning the focus to Belgrade, it can be represented as the capital and the largest city in Serbia. According to census in 2011, it had a population of slightly more than 1.2 million inhabitants, and with wider surrounding around 1.7 million inhabitants.

From the aspect of tourism, after introspection in Strategic documents, its' territorial diversity can be divided and then grouped into the following zones: urban zones, aquatic zones, parks and zones for recreation, ecological-touristic zones and rural areas (mostly peri-urban areas), (IEN, 2008).

What is impressive that Belgrade can offer to potential guests? According to Vuković et al. (2013) that will be: numerous of cultural and historical monuments, museums, galleries and capital facilities; various environmental complexes at the macro and micro level; landscaped green areas throughout the whole city territory; arranged access to Danube and Sava river; tourist complexes relatively close to core centre; number of and good dispersion of sport-recreational facilities; abundance of cultural and tourist events throughout the whole year; attractive restaurants and excellent catering services, etc.

Despite various contents, currently Belgrade´s tourism demand is highly dependent on business travel. Nevertheless according to Joksimović et al. (2013) »Belgrade has been acknowledged as a low-cost destination of fun and nightlife and the city's new image has attracted more foreign tourists». On the other hand »it is well known that urban green spaces represent the most valuable part of urban open space from ecological point of view» (Anastasijević et al., 2009). At the same time, being the capital city it is to expect that tourist arrivals will be concentrated in Belgrade on the account of lower arrivals in other areas (Pejović et al., 2008). Belgrade itself has got several micro destinations which are attractive for tourists, both domestic and foreign (Lakićević, Srđević, 2011). Some authors have developed project for alternative means of transport by ropeways like shuttles, gondolas, street escalators (Maksimović, Međo, 2008). For all of those reasons, it was necessary to make an overview of the arrivals, current and planned capacities in Belgrade.

Methodology and data on tourist arrivals in Serbia

In this research the authors have used several sources of secondary data, mostly originating from the Statistical Office of the Republic of Serbia. In the conjectural part of the paper there was reviewed literature related to the topic. We have presented the most important facts which might be important in affecting tourist arrivals. The research uses the most recent data from the period 2007–2013, therefore following the crisis and post crisis period.

In the Republic of Serbia, the number of visitors reached its peak in 2007, when it was visited by 2.3 million visitors, out of which 0.75 million visited Belgrade. After that period of reduced tourist arrivals has begun and it lasted until 2010. In that period tourist arrivals in Serbia were reduced by 13 % to the level of 2 million, with 0.62 million visiting Belgrade. Therefore the drop in arrivals was higher in Belgrade where it recorded 19 %. In the next three years a steady recover of tourist arrivals in Serbia was recorded. In 2013 tourist arrivals increased by 10 % as compared to the level in 2010. However the recovery of number of visitors of Belgrade region became one year earlier and in that period, 2009–2013, total number of arrivals has increased by 19 % (Table 1).

Table 1 – Tourist arrivals from 2007 to 2013

Element	2007	2008	**2009**	**2010**	**2011**	**2012**	**2013**
Republic of Serbia	2,306,558	2,266,166	2,018,466	2,000,597	2,068,610	2,079,643	2,192,435
Domestic arrivals	1,610,513	1,619,672	1,373,444	1,317,916	1,304,443	1,269,676	1,270,667
Foreign arrivals	696,045	646,494	645,022	682,681	764,167	809,967	921,768
Belgrade region	764,466	705,574	602,034	618,454	619,124	660,674	718,943
Domestic arrivals	328,528	328,657	232,457	223,046	178,777	189,375	182,006
Foreign arrivals	435,938	376,917	369,577	395,408	440,347	471,299	536,937

Source: Statistical Office of the Republic of Serbia, Belgrade.

Table 2 – Tourist nights from 2007 to 2013

Element	2007	2008	2009	2010	2011	2012	**2013**
Republic of Serbia	7,328,692	7,334,106	6,761,715	6,413,515	6,644,738	6,484,702	6,567,460
Domestic nights	5,853,017	5,935,219	5,292,613	4,961,359	5,001,684	4,688,485	4,579,067
Foreign nights	1,475,675	1,398,887	1,469,102	1,452,156	1,643,054	1,796,217	1,988,393
Belgrade region	1,563,526	1,431,328	1,368,842	1,319,629	1,337,199	1,431,384	1,489,801
Domestic nights	701,405	671,485	540,112	509,807	466,227	493,531	453,526
Foreign nights	862,121	759,843	828,730	809,822	870,972	937,853	1,036,275

Source: Statistical Office of the Republic of Serbia, Belgrade.

The average share of arrivals in Belgrade region in total number of arrivals in the observed period from 2007 to 2013 was 31,4 %. In the same observed period the majority of total arrivals in Serbia referred to domestic tourists arrivals which constituted 65,3 % of total arrivals. From the total number of foreign arrivals in the period 2007–2013, Belgrade participated with 58,7 % (Table 2).

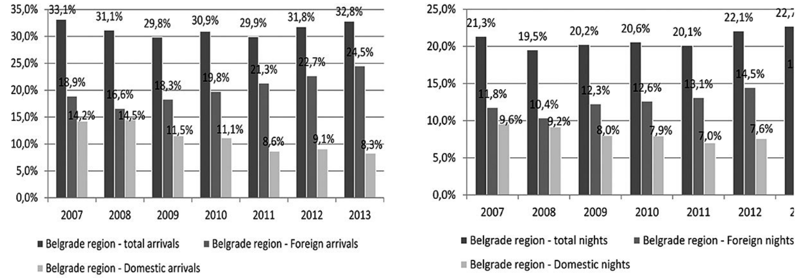
The similar trend that followed total number of arrivals in Serbia was recorded at the number of visitor nights in the same 7 years period. After the reduction of total number of tourist nights in Republic of Serbia from 2007 to 2010, in which number of tourist's nights was reduced by 12,5 %, from 7,3 million to 6,4 million, a period of steady recovery begun. In the period from 2010 to 2013, total number of tourist nights in Serbia increased by 2,4 %. In the Belgrade region number of tourist nights from 2007 to 2010 was reduced by 15,6 %, from 1,5 million to 1,3 million tourist nights, after which the recovery from 2010 to 2013 was much faster than the recovery recorded on state level and it reached 12,9 %.

In the observed period from 2007 to 2013, domestic tourist participated with 76,2 % in overall number of tourist nights spent in Serbia, while the Belgrade region participated with 54,6 % in total number of recorded foreign tourist nights in Serbia.

It should be mentioned again the thesis that registered increase in arrivals of foreign tourists (mostly from EU), along with the impact of global economic crisis, could be a great chance for Belgrade and Serbian tourism at all, having in mind that the cost of desired tourist services in Serbia is relatively lower compared with some traditional destinations in surrounding, so on world touristic map Belgrade and Serbia starts to be identified as an attractive tourist alternative (Jeločnik et al., 2013).

After deeper reconsideration of tourist offer of Serbian capital, domination of following tourist products were identified: Business and MICE tourism (due to the fact that Belgrade is the administrative, cultural, economic and educational centre of Serbia); Excursion and touring (Belgrade is mainly within the offer of many European tour operators, especially those whose programs are based on the Danube river); Tourism of special interest (based on cultural-historical heritage, arts and tradition of the territory, gastronomy, sports-recreational facilities, etc.); Events; Nautical and fishing tourism (relying on the Danube river and its numerous tributaries); Rural tourism (satisfactory resource potentials in the urban hinterland, in other words peri urban areas); etc., (Vuković et al., 2013).

Share in total tourist arrivals in Serbia Share in total tourist nights in Serbia



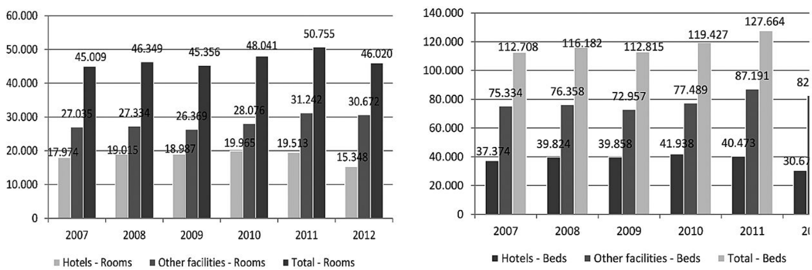
Source: Statistical Office of the Republic of Serbia, Belgrade

Figure 1 – Share of the Belgrade region in total number of tourists' arrivals and nights in Serbia

Visitor numbers enjoyed an overall boost from the Summer Universiade in 2009, partially explaining the amelioration in visitor nights due to the positive influence felt as a result of the Universiade, as participants at the 2009 Belgrade World Universiade stayed an average of 13 nights in the host city Belgrade. The visa liberalization which came into force at the end of 2009 had a strong influence on the decrease of domestic tourism, as it enabled Serbians to freely travel to EU countries providing new alternatives to domestic travel.

The capacities of rooms and beds in Serbia in the period from 2007 to 2011 were increased by approximately 13 % each. In hotels number of rooms was increased by 8,6 % and number of beds available by 8,3 %. But in 2012 reduction in capacities of rooms and beds have occurred, when the total number of rooms and beds are reduced by 9,3 % and 11,2 % respectively in comparison to the previous year. Average share of rooms and beds in hotels in the total number of rooms and beds in the period from 2007 to 2012 was around 40 % (Figure 2).

Number of rooms available Number of beds available



Source: Statistical Office of the Republic of Serbia, Belgrade

Figure 2 – Rooms and beds capacity in Serbia

Table 3 – Tourist arrivals by type of accommodation in Serbia from 2007 to 2012

Element	2007	2008	**2009**	**2010**	**2011**	**2012**
Hotels – All	1,410,000	1,405,000	1,233,000	1,280,606	1,291,955	1,308,901
5 – star hotels	107,000	96,000	100,000	93,524	109,650	105,125
4 – star hotels	231,000	241,000	236,000	254,154	277,772	416,151
3 – star hotels	590,000	565,000	484,000	522,242	521,193	481,319
2 – star hotels	333,000	366,000	297,000	281,746	275,366	260,475
1 – star hotels	73,000	57,000	34,000	44,142	32,584	45,831
Hotels not categorized yet	76,000	80,000	82,000	84,798	75,390	0
Other accommodations	896,558	861,166	785,466	719,991	776,655	770,742
Total	2,306,558	2,266,166	2,018,466	2,000,597	2,068,610	2,079,643

Source: Statistical Office of the Republic of Serbia, Serbia.

Table 4 – Tourist nights by type of accommodation in Serbia from 2007 to 2012

Element	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
Hotels – All	3,612,000	3,690,000	3,172,000	3,159,056	3,190,945	3,149,880
5 – star hotels	219,000	195,000	212,000	205,524	224,938	220,390
4 – star hotels	551,000	569,000	530,000	544,494	611,236	882,813
3 – star hotels	1,453,000	1,435,000	1,207,000	1,233,430	1,222,263	1,148,576
2 – star hotels	924,000	1,017,000	830,000	747,301	780,191	762,718
1 – star hotels	188,000	161,000	102,000	136,654	97,350	135,383
Hotels not categorized yet	277,000	313,000	291,000	291,653	254,967	0
Other accommodations	3,716,692	3,644,106	3,589,715	3,254,459	3,453,793	3,334,822
Total	7,328,692	7,334,106	6,761,715	6,413,515	6,644,738	6,484,702

Source: Statistical Office of the Republic of Serbia, Belgrade.

According to the data from Belgrade Chamber of Commerce, total number of beds available in Belgrade in 2012 was 12,106 of which 7,374 belongs to hotels, or 61 % of total number of beds in Belgrade. Average beds capacity utilization in Belgrade in 2012 was 35,8 % and in hotels 41,4 %.

Total number of arrivals and nights in hotels in Serbia in the period from 2007 to 2012 was reduced by 7,2 % and 12,8 % respectively. Despite the overall reduce in number of arrivals and nights spent in hotels in Serbia in analysed period, number of arrivals and nights spent in 5 star hotels were more or less stable. In 4 star hotels number of arrivals and nights spent increased by 80,2 % and 60,2 % respectively. In 2012 in comparison to 2011, number of arrivals in 4 star hotels number by 49,8 % and number of nights spent by 44,4 % (Tables 3 and 4).

In analysed period average share of arrivals in hotels in total number of arrivals in Serbia was 62,3 %, while the average share in total nights spent was 48,7 %. In total number of arrivals and nights spent in analysed period, 5 star hotels had a share of 4,8 % and 3,1 %, while 4 star hotels had 13,1 % and 9,1 % respectively. The average number of nights spent by tourist in hotels in the analysed period was 2,4, while in the 5 star and 4 star hotels was 2,1 days per tourist (Tables 3 and 4).

Number of tourist arrivals and nights spent in the Belgrade region in period from 2007 to 2009 decreased by 15,6 % and 16,6 % respectively due to a general decrease in arrival numbers and not hotel specific. After 2009, data shows a steady increase in hotel visitor numbers and nights spent in average by 7 % per year. The average number of nights spent by tourist in the Belgrade region in the analysed period was 2.1 days per tourist (Tables 5 and 6).

In the period 2007–2012 the source of demand for Serbia in terms of visitor nationality is primarily oriented on Balkan nations, with only Germany and Italy in the top ten visiting nations being from outside of this area. The number of visitors from Western Europe has been steadily increasing. In particular festivals such as the Exit Festival and the Belgrade Beer Festival helped attract leisure tourists from Western Europe.

Table 5 – Tourist arrivals by type of accommodation in the Belgrade region from 2007 to 2012

Element	2007	2008	**2009**	**2010**	**2011**	**2012**
Hotels – All	481,293	430,740	406,023	442,555	474,354	500.528
Other accommodations	283,173	274,834	196,011	175,899	144,770	160.146
Total	764,466	705,574	602,034	618,454	619,124	660.674

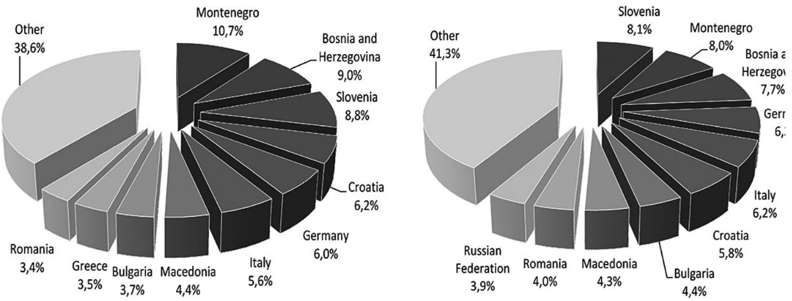
Source: Institute for Informatics and Statistics Belgrade, Tourist organization of Belgrade, Belgrade.

Table 6 – Tourist nights by type of accommodation in the Belgrade region from 2007 to 2012

Element	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
Hotels – All	987,332	893,205	823,905	897,856	943,300	1,011,774
Other accommodations	576,194	538,123	544,937	421,773	393,899	419,610
Total	1,563,526	1,431,328	1,368,842	1,319,629	1,337,199	1,431,384

Source: Institute for Informatics and Statistics Belgrade, Tourist organization of Belgrade, Belgrade.

In the period from 2007 to 2012 For the year 2012



Source: Statistical Office of the Republic of Serbia, Belgrade.

Figure 3 – Tourist arrivals by countries

Overview of the Hotel demand in the Belgrade region

Hotel demand in Belgrade is driven by the corporate market. There are a number of international companies and employers with headquarters or large premises in the city and this drives demand during the working week. This includes multinational companies such as: Samsung, Nestlé, Mercedes, Fiat and others, 21 foreign commercial banks, 21 foreign insurance companies and others. As the city is also the political and administrative capital of Serbia, there is additional corporate demand generated by government and foreign embassies.

During the 1980s Serbia was much better known as a business destination than today, where only approximately 30 % of inbound tourists travel to the country for business. In terms of existing floor area, Serbia is arguably the largest fair country in the Balkan region and the city undoubtedly benefits from this advantage. Belgrade's largest convention area is the Belgrade Fair which annually organizes in about 30 fair events with approximately 1,5 million visitors annual. The Sava Centre is also a significant conference venue in Belgrade with 18 conference halls with capacities ranging from 20 to 4,000 people. Belgrade Arena is one of the highest technical profile sport halls in Europe with the capacity of 23,000 people.

However, in terms of the International Congress and Convention Association (ICCA) rankings, Belgrade fails to feature in the top 20 European cities compared to its neighbouring capitals Budapest, Prague and Vienna (Table 7).

Table 7 – ICCA Ranking 2012

Element	Belgrade	Budapest	Vienna	Prague
Meetings	38	98	195	112
World rankings	60	20	1	11
European ranking	31	15	1	10

Source: ICCA, the Netherlands.

Demand for hotels and other form of accommodation in Belgrade peaks between April and October. The growth in visitor numbers from Western based economies will be a key factor in the successful growth of the local hotel market. In the past it was considered that this would be a rapid process, although based on current market conditions both international and local it is more likely that this will be a long and slow process.

The leisure market is still very limited and seasonal, mainly from April to October. Belgrade is expected to attract an increasing number of tourist groups in the medium term given the current low base. This segment of demand will be important in the medium to long term. The relative lack of recognized tourist attractions in Belgrade will, at least in the short term, have a negative impact on leisure tourism, particularly from Western Europe and further destinations.

Leisure demand in Belgrade mainly consists of those visiting tourist attractions in the city or visiting family and friends. Additional demand is driven by tour groups travelling the region particularly by the river Danube. The average leisure stay is short in Belgrade, as a result of the city's size. Backpackers make up a considerable number of leisure tourists. Their primary motivations to visit Belgrade are the renowned festivals and the city's famous nightlife. This segment of tourist visitors has traditionally stayed at lower category hotels.

Overview of Hotel market in the Belgrade region

Much of the existing supply in the past comprised dated hotels that were privatized, or are in the process of privatization. These hotels are in poor condition and far from the requirements of the contemporary business traveller. One of the characteristics of the hotel market in Serbia and consequently Belgrade area is that the local hotel categorization standards do not necessarily correspond to international requirements for the hospitality industry. For example, a significant portion of the existing four star hotels in Belgrade would be seen as mid-scale three star hotels.

The most dynamic changes in the Belgrade hotel market in recent years occurred in the four star hotel segment, where three new facilities were opened: IN Hotel, Holiday Inn and Zira Hotel. Besides these hotels, another 21 small new four star properties were opened in Belgrade's downtown area, such as: Design Hotel Mr. President (2007), Town House 27 (2008), Life Design Hotel (2009), Hotel Crystal (2010), Belgrade Art Hotel (2010), etc. Considering that most upscale hotels in Belgrade are positioned in New Belgrade, these hotels have recognized their market niche by locating their premises in the downtown Belgrade. International Hotel chains have a considerably lower market share in Belgrade than in other major cities of Central and Eastern Europe, where they own and/or operate between 40 to 80 % of all rooms in each city.

Table 8 – Luxury hotel segment in Belgrade area

Hotel	Location	Number of rooms	Category	Best rate*
Metropol Palace	Old Belgrade	240	Luxury	146,00 EUR
Holiday Inn	New Belgrade	140	Upper Midscale	130,00 EUR
IN Hotel	New Belgrade	187	Upper Midscale	73,00 EUR
Square Nine	Old Belgrade	45	Luxury	180,00 EUR
Zira	Old Belgrade	125	Upper Midscale	82,50 EUR
Hotel Town house 27	Old Belgrade	21	Luxury	131,00 EUR

* The rate is the lowest available rate on [23–24th August 2013] for a double room with dual occupancy, booked in advance on the internet. The rate includes VAT and breakfast.

Luxury hotels in Belgrade are competing with smaller hotels as well, which would not be a case in a more established hotel market. These hotels due to its location or historical significance have established a market niche which in some sense represents a secondary competition for luxury hotels in Belgrade.

The Belgrade market is still in a development phase and there are a number of proposed hotels under construction in Belgrade. Four of the proposed hotels are in the five star category and all remaining ones are in the four star category, with the exception of the Holiday Inn Express, and they all will therefore compete for similar market segments. Many projects were announced several years ago and as yet have not recorded any progress in their development. Nevertheless, international operators remain interested in the location (Table 9).

Table 9 – Future hotel projects in Belgrade area

Hotel	Number of rooms	Category	Location	Opening date
µ T	171	5 star	New Belgrade	2012/2013
Crowne Plaza Belgrade (Inter Continental)	415	5 star	New Belgrade	2013
Old Mill Radisson Blu	220	4 star	Old Belgrade	2014
Courtyard by Marriott	120	4 star	Old Belgrade	2014
Kempinski Hotel Belgrade	280	5 star	New Belgrade	2016/2017
Hilton	225	5 star	Old Belgrade	N/A
Boat hotel	N/A	4 star	N/A	N/A
Holiday Inn Express	N/A	3 star	N/A	N/A

Source: Management of certain Companies (hotels).

It should have always in mind the business maxim that follows common sensibly economic logic that tourism is effective proportionally to the total investments in it, so mentioned is focused on the fact that developed tourism later successfully covers all debts to national economy.

From the aspect of more intensive tourism development in Belgrade, in upcoming mid-term horizon is necessary to approach to the next activities: more aggressive attraction of potential investors; Strengthen the position of Belgrade in the international tourist market; Innovate the promotional activities in line with global trends; Available tourism products bring closer to targeted market segment; etc.

CONCLUSION

Level of development of tourism in Serbia and its' capital is in slight disproportion with the available contents, before all nature and cultural and historical heritage. Definitely Belgrade has something to offer, but from public and private investors are expected to adequately adjust offer of Belgrade touristic market with usually higher requests of contemporary tourists.

Adjustments have to be done quickly, how all economic facts go in favour to Serbia and Belgrade, having in mind that during the crisis and post-crisis period Belgrade turned into the more and more required tourist alternative to traditional destinations in Serbian surrounding. So, optimal price for offered quality of tourist services might be a great chance for development of Belgrade at all.

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РОЛЬ ИННОВАЦИЙ В РЕСТОРАННОМ БИЗНЕСЕ

THE ROLE OF INNOVATION IN THE RESTAURANT BUSINESS

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Аннотация: *Статья раскрывает проблемы развития одной из наиболее многообещающих отраслей с точки зрения инновационного менеджмента – ресторанного бизнеса.*

Ключевые слова: *организация питания, инновации, управление инновациями, сервис, инновационный процесс, инновационное решение, рыночная экономика, конкуренция, качество продукции.*

Summary: *The article reveals the problems of the development of one of the most promising in terms of innovative management services industries – the restaurant business.*

Keywords: *catering, innovation, management innovation, service, innovation process, innovative solution, market economy, competition, product quality.*

В настоящее время ресторанный бизнес является перспективным направлением и требует серьёзного осмысления мирового опыта и