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FACULTY OF TOURISM AND BUSINESS LOGISTICS

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CHALLENGES OF TOURISM
AND BUSINESS LOGISTICS IN
THE 21ST CENTURY

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COMPARATIVE ANALYSIS OF EMPLOYMENT AND SELF-EMPLOYMENT IN NORTH MACEDONIA AND THE WESTERN BALKANS	245
<i>Mimoza Serafimova ; Snezana Bardarova ; Drasko Atanasovski</i>	
INCENTIVE TRAVELS AND THEIR USE IN THE REPUBLIC OF NORTH MACEDONIA	253
<i>Mladen Micevski ; Nikola Cuculeski</i>	
THE IMPACT OF WORLD HOTEL CHAINS IN MACEDONIA.....	261
<i>Natasha Miteva ; Dushica Popova</i>	
RURAL TOURISM IN THE SPACE OF NP "PELISTER" CASE STUDY: "EIGHT PELISTER VILLAGES"	267
<i>Nikola Dimitrov ; Biljana Petrevska ; Aleksandra Terzic</i>	
WINTER TOURISM SERVING AS BASIS FOR ECONOMIC DEVELOPMENT IN BROD- THE REGION OF PRIZREN	279
<i>Naser Bresa ; Nikola Dimitrov</i>	
TOURISM POTENTIALS OF THE SOUTHWEST PLANNING REGION	289
<i>Naume Marinovski ; Mihail Risteski</i>	
ECONOMIC ASPECTS OF GASTRONOMY AS A CREATIVE INDUSTRY	297
<i>Risto Gogoski ; Vasko Cuculeski</i>	
IMPLEMENTATION CHALLENGES AND PROSPECTIVES FOR THE DEVELOPMENT OF THE ACADEMIC STUDIES OF INTERNATIONAL HOSPITALITY SCHOOL IN MONTENEGRO	305
<i>Sanida Sabotic ; Aleksandra Martinovic</i>	
ANALYSIS OF EMPLOYMENT IN TOURISM AND HOSPITALITY SME'S: THE CASE OF THE REPUBLIC OF NORTH MACEDONIA	313
<i>Snezana Bardarova ; Danijela Durkalic ; Risto Elenov</i>	
MEDIATION-A WAY OF SOLVING CHALLENGES IN TOURISM	323
<i>Svetlana Popova</i>	
ROMANIAN COVERGENCE AND MACROECONOMIC PERSPECTIVE FROM EU MEMBERSHIP	331
<i>Tatjana Boshkov ; Dushko Joseski ; Zarko Radjenovic</i>	
ANALYSIS OF TRAVELS AND OPPORTUNITIES FOR CROSS-BORDER COOPERATION BETWEEN BULGARIA AND NORTH MACEDONIA	339
<i>Vanya Vasileva ; Dora Kabakchieva</i>	
POSTER PRESENTATIONS	349
CONCLUDING REMARKS AND RECOMMENDATIONS.....	351

THE IMPACT OF WORLD HOTEL CHAINS IN MACEDONIA

Natasha Miteva¹; Dushica Popova²

Abstract

The aim of this paper is to present the impact that hotel chains have on the Macedonian market. Tourist number growth as well as tourist spending, tourist exports, foreign investments, GDP, and attractive job offers are just a few of the advantages hotel chain have on the markets due to their high ranking, reputation, and recognition. Besides their direct impact, there is also an indirect impact on the country as a whole, which includes defining the country's tourist product, modernization, standardization, opportunities for better position on the world market and competitiveness. Moreover, having world hotel chains present on the Macedonian market implies acceptance of higher working standards and consumer recognition, which lead to sustainable tourism development.

Key Words: *hotel chains, tourism, hotel market, tourist growth, tourist spending, impact*
JEL classification: *M00*

Introduction

The characteristics of domestic hotel industry have an important role defining the success of hotel company development. Moreover, the nature of demand and competitiveness of the local market creates the culture of the management team. The hotel sector includes hotels, motels, restaurants, clubs, boarding houses, fast-food restaurants, rest houses, convention houses, casinos, etc. Given that, hotels have been seen as a general aspect of the hotel industry and they represent certain type of human activity, an important social dimension, as well as a satisfaction of psychological needs for shelter and physical comfort. Seeing it from an international point of view, it is of great importance to understand that the hotel can be seen as a cultural phenomenon too.

Nowadays hotel industry is in its mature phase with expressed intensive competition, due to which the greatest growth is happening on an international level. Two of the most important factors for the international hotel segment are the domination of numerous undependable small business units, and the increased penetration of business chains. These two factors clearly indicate that the horizontal integration and consolidation in international hotel segment are his dominant features in the last period. Because of these dominant features, the demand of international hotel industry is dynamic and unpredictable, whereas hotel chains are the ones that on a world level enjoy vast benefits. Furthermore, these factors are also seen as the trends which drive the hotel industry as a whole, and which in times of crisis can help with her sustainability. Even though, the economy is one of the factors that affect the growth and development of hotel industry; it is known that the hotel industry also has impact on the economy.

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The key for success of hotel and tourism industry in R. North Macedonia, as an influential and potential driving strength of the economy, lies in their growth and development strategies. Even though, Macedonian hotel market is relatively young, it still has a satisfactory potential for the development world recognizable product.

Presence on the Macedonian market

For most people interested in doing business in the hotel industry, the most popular entrée is through owning the business. The same decision stands for either hotel or restaurant, single unit or entire chain. When the entrepreneurs chose to start their own business, they face dealing with decisions such as strategy, location, offer, financing, etc. With the hotel industry development, companies started to change the strategy they use to enter and sustain on the market.

In 1993, Mintzberg defines the term "strategy" by focusing on the plan, model, position and perspective, after which this idea is introduced in the organizations. Accordingly, the decisions for company's growth has to be connected to their business strategy, which also affect the company as a whole redefining their operational area. As a result, the expansion is something domestic companies operating in today's modern and dynamic economy must do.¹

If leaders decide to expand it is necessary to analyze all possibilities for growth, meaning in which direction they want to expand their operation. Hotel chains can expand choosing from several growth strategies, none more important than the other. No matter if the hotel is established and entered the hotel industry on its own with a goal to become hotel chain, or as a part of established world hotel chain, there are five main strategies for growth and development on the international market. Those include franchise, strategic alliances, managerial contract, acquisitions, and joint ventures.²

Several research conclusions indicate that franchise is the preferred strategy among hotel chains during expansion, and its implication results in increased market concentration of hotel chains.

According to the last official document issued in 2016 by the sector for tourism, Ministry of economy, the total number of registered hotels on the Macedonian market is 229, out of which 4 belong to an international hotel chain.³ There are three more hotels not included in the official document of categorized hotels, increasing their number to 7. Still, the presence of world hotel chains on the Macedonian market is 3%.

The brands representing the world hotel chains are *Holiday Inn*, *Wyndham*, *Accor*, *Best Western*, *Hilton* and *Marriot*. Looking at the category to which they belong, we have the following situation:

¹ Cumill, O. (2006) *The growth strategies of hotel chains: Best business practices by leading companies*, Haworth Hospitality Press, New York, p. 8

² Sufi, T. (2008). *Hospitality industry: An overview of strategy, structure and globalization*, Journal of Hospitality Application & Research, BIT Mesra, Ranchi, 3(1), pp. 50-57, achieved from: https://www.academia.edu/1969688/HOSPITALITY_INDUSTRY_STRUCTURE_STRATEGY_AND_GLOBALIZATION

³ Министерство за економија на Р. Македонија, Сектор за туризам, Преглед на категоризирани хотели, состојба 31.1.2015 година, преземено од: http://archive.economy.gov.mk/ministerstvo/sektori_vo_ministerstvo/sektor_turizam_ugostitelstvo/4359.html

Table 1: *World hotel chains on Macedonian market*

No.	Hotel	Chain	Category
1	Hotel Ramada Plaza	Wyndham Worldwide	5* S
2	Hotel Holiday Inn	ING - InterContinental Hotels Group	5*
3	Hotel Best Western Tourist	Best Western	4* S
4	Hotel Best Western Bellevue	Best Western	4*
5	Ibis Skopje City Centre	Accor	4*
6	DoubleTree By Hilton	Hilton	5*
7	Skopje Marriot Hotel	Marriot International	5*

Source: *Adjusted from Ministry of economy of R. Macedonia, sector for tourism, Overview of categorized hotels, state as of 31.01.2015*
(http://archive.economy.gov.mk/ministerstvo/sektori_vo_ministerstvo/sektor_turizam_ugostitelstvo/4359.html)

Five of the hotels mentioned above have entered the Macedonian market with the use of franchise as an expansion strategy. These are Hotel Ramada Plaza, Hotel Holiday Inn, Ibis Skopje City Centre¹, DoubleTree by Hilton², and Skopje Marriot Hotel³. Hotel Best Western Tourist and Hotel Best Western Bellevue have used the managerial contract as an entry strategy⁴. According to the research done in the monograph, the establishment and operation of a hotel under worldwide known chain on the Macedonian market is done under clear and opened conditions.⁵ These results as a model for effective and efficient entry presented in the same monograph.

Impact on the Macedonian market

Hotel industry services appear long time ago and with its growth and improved quality become more and more significant in the development of national economies. Hotel industry has numerous impacts over several sectors, on a national level as well as on a global level, including increasing direct and indirect employment, growth of an international and national tourism, local economy development, and growth in the transport industry, better infrastructure, technology, and communications. The wide impact that hotel industry has, can be explained with its definition that covers a growing flow of services, people and goods due to the increased differentiations during time.

As well as all other developing countries, the same stands for R.N. Macedonia too. The hotel industry is directly proportionate to the tourism that furthermore affects the economy as a whole. When it comes to proving its impact with facts, we look at the numbers from the State Statistical Office of R.N. Macedonia. Among the first numbers, which are of interest when it

¹ Митева, Наташа. (2018). *Раст и развој на хотелските синџири и можни стратегии за влез на македонскиот пазар: стручна монографија*. Наташа Митева. ISBN 978-608-245-266-1, стр. 261-262

² *Hilton Worldwide Enters Macedonia with Signing Of Double Tree by Hilton Skopje*. (2013) DoubleTree by Hilton,
https://www.franchising.com/news/20130612_hilton_worldwide_enters_macedonia_with_signing_of.html

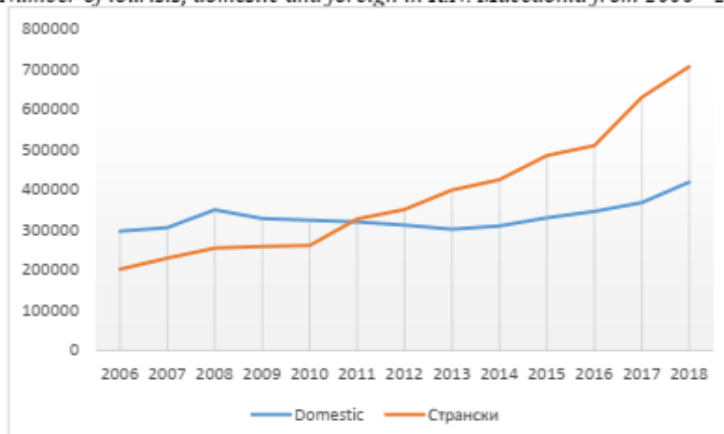
³ Marusic, J.S., (2011). *Work on First Marriott Hotel Begins in Macedonia*, achieved from:
<https://balkaninsight.com/2011/06/28/marriott-hotel-construction-begins-in-macedonia/>

⁴ Same as footnote 4

⁵ Same as footnote 4

comes to analyzing the tourist and hotel industry, is the number of tourists through the years. Table 2 presents the number of tourists, domestic and foreign, from 2006 to 2018.

Table 2: Number of tourists, domestic and foreign in R.N. Macedonia from 2006 - 2018



Source: Data achieved from the online database from the State statistical office of R.N. Macedonia (<http://www.stat.gov.mk>)

From the table clearly can be seen the trend of growth in the number of tourists for the past 12 year, more or less. Furthermore, the State statistical office has a publication that analyzes the period from 2011 to 2015 during which the number of hotel chains has significantly increased. According to the publication, it can be noted that during the same period the number of tourists is increased too. The percentage of growth is around 30% total, from which 20% increase is identified in the number of foreign tourists.

The evaluations go further by analyzing the growth of hotel industry turnover, hotel turnover, number of employees, number of tourist agencies, and all the sectors influenced by the presence of hotel chains on the market. For the same period, from 2011 to 2015, the total growth in the hospitality turnover is 8.13%, and the growth in hotel turnover is increased by 10%. Looking at the employment rate, the number of employees is increased by 6%.¹ A fact that is even more interesting is the number of registered tourist agencies, which has been doubled from 2011 to 2015. Meaning, until 2011 there were 250 registered tourist agencies, and in 2015, their number went to 519.²

Since there is no official publication for an analysis of the next four year period as the one mentioned previously, we could use the data from the database of State statistical office and analyze it. The numbers included in their database suggest that from 2015 to 2018 there is an increase of 38% in the total number for tourists and 33% in the nights spend. Looking separately in the number of foreign and domestic tourists, again, the bigger change is in the number of foreign tourists and nights spend in the country, an increase of 46% and 44% respectively. The

¹ *Tourism in Republic of Macedonia 2011-2015*, State Statistical Office, 2016, achieved from: <http://www.stat.gov.mk/Publikacii/8.4.16.01.pdf>

² *Register of tourist agencies*. (2015). Sector for tourism and hospitality, Ministry of Economics of R. Macedonia, achieved from: <http://archive.economy.gov.mk/ministerstvo/sektori%20ministerstvo/sektor%20turizam%20ugostitelstvo/3886.html>

number of domestic tourists and nights spend in the country is also increased by 26 and 24% respectively. There is not any data for the hospitality turnover for 2018, but the change from 2015 to 2017 indicates a strong growth of almost 18%. According to the report from the State statistical office issued 2019, the number of registered tourists is 646, indicating an increase of 8%.¹

Conclusion

The number of world hotel chains on the Macedonian market is in continuous growth, due to the relatively low entry barriers and favorable conditions for establishment and sustainability. Their presence has great influence on the Macedonian hotel market, as well as the tourist industry as a whole. The entry of hotel chains on the market offers to all, either big or small hotels, opportunities for sustainability. Furthermore, their strengthening leads to a market optimization. The possibility for hotel chains entry on the Macedonian market opens the opportunity to create and promote a recognizable tourist product. As a result, there will be increased competition, which in the world practice is proven to be "healthy" or "looked-for" due to the analysis of the environment which also triggers increased marketing activities for consumer attraction. Competition is also seen as an internal motivator, as well as common motive for hotel chain merge.

Clearly, the result of hotel chain presence on the Macedonian market is profit, new knowledge, and new investments in relation to the expansion strategy used for entry, as well as growth encouragement of the Macedonian hotel market entirely. High quality standards, which world hotel players impose, bring rationality on the market, its modernization, and building a recognizable image of the Macedonian hotel market.

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¹ Register of tourist agencies. (2019). achieved from [http://www.economy.gov.mk/Upload/Documents/%D0%A0%D0%B5%D0%B3%D0%B8%D1%81%D1%82%D0%B0%D1%80%D0%BD%D0%B0%D0%D1%82%D1%83%D1%80%D0%B8%D1%81%D1%82%D0%B8%D1%87%D0%BA%D0%B8%20AGENCI%D0%20\(2\)-5\(3\).pdf](http://www.economy.gov.mk/Upload/Documents/%D0%A0%D0%B5%D0%B3%D0%B8%D1%81%D1%82%D0%B0%D1%80%D0%BD%D0%B0%D0%D1%82%D1%83%D1%80%D0%B8%D1%81%D1%82%D0%B8%D1%87%D0%BA%D0%B8%20AGENCI%D0%20(2)-5(3).pdf)

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