

STATISTICAL ANALYSIS OF TOURIST FOOD SUPPLY INDUSTRY

ANNOTATION

Objective: The use of statistical methods of analysis in relation to the tourism industry supply.

Methods: The statistical method of observation and data grouping was used as well as the method of general indicators.

Results: The contemporary role of public catering was disclosed as a branch of economy. Features of the tourist food supply were shown. The statistical groupings of public catering services were presented on the basis of international and Russian classifiers. A brief characteristic of the organizational forms of tourist food supply was given. Estimates of the share of turnover of tourist food supply were made in the context of the analysis of the dynamics of turnover of catering

Scientific novelty: For the first time a comparative analysis of classification of public catering services in the Russian and international statistics was conducted. The impossibility to obtain accurate statistical estimates of the share of the tourist –consumers and tourist food supply turnover in the general structure of consumption of public catering services was proved.

Practical value: The ability to use the broad grouping method and statistical analysis of data in studies of trends in the development of the tourist industry.

KEYWORDS: tourism statistics, tourist food supply, classification of services, public catering turnover.

Introduction

Catering industry is a combination of companies engaged in production, sale and consumption of food products. According to the Russian standards the food service is defined as "an independent branch of the economy, ..., that organizes food supply for population, as well as the production and sale of semi-finished and finished products, both at the catering enterprise and outside of it" [1].

In catering, there are some individual elements of material production, mainly related to the refining of foods and food storage. These operations represent a continuation of the process of production in the sphere of circulation. The main thing in catering - the production and consumption of services, so in a modern market economy catering relates to the field of non-production, that is, to the service sector.

In modern conditions the purpose of catering is to meet the needs of people in getting quality food



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services necessary for their normal life, and to maintain the efficiency of the entire system as a sub-sector of the catering economy. In other words, the role of public catering is not only in food preparation and provision of services to recover energy expended in the process of vital functions of human life, but also in creating a competitive and efficient sector of the economy.

A special feature of the tourist food supply is that it can not only be a mandatory element of the tourist product, but also an independent motive of the tourist activities. Obviously, during a tourist trip a man must eat, using a variety of forms of organization of their own food consumption (outdoor restaurants and cafes, restaurants in hotels, self-cooking during hiking and so on).

However, many tourists to familiarize themselves with the national cuisine of a country buy various gastronomic and drinking tours. During these tours they observe local customs, often becoming participants of holidays and carnivals. So, trips around Germany or the Czech Republic rarely go without visiting beer bars; in Spain - without the 'paseo and tapeo', that is, without a walk to bars and tasting snacks that are served with wine and beer.

Classification of catering services in International and Russian statistics

According to the International Standard Industrial Classification of All Economic Activities (ISIC), adopted by the Statistical Commission of the United Nations in 2009 (4th version), catering services are reflected in section I «Accommodation and Catering», under the subsection "Performance of Catering Enterprises."

This subsection includes the activities of enterprises in this sphere, "providing fully ready meals or

beverages intended for immediate consumption, in the form of traditional restaurants, self-service restaurants and catering establishments selling prepared meals to go, as well as temporary or stationary stalls with seats with or without" [2, page 234].

Wherein, the international practice emphasizes that crucial is the very fact of offering intended for immediate consumption dishes, but not the kind of company that offers such dishes. In other words, a company service of any organizational and legal form will apply to catering services, if these services are associated with an immediate consumption of the dishes to be offered.

Three types of services are included into the subsection "Performance of catering enterprises":

- performance of restaurants and mobile public catering outlets, covering the performance of restaurants, cafes, fast food outlets, pizza delivery, and so on. This subgroup includes the provision of food to customers regardless of whether they are served by waiters or they serve themselves, whether they consume ready meals in service or take them out;
- catering, that covers mobile catering performance during special events or during a specified period of time and that covers leased public catering outlets which provide catering service at sports and similar facilities;
- performance of premises (bars, pubs, taverns, discos and so on) serving drinks - services on preparation and submission of drinks for consumption in the service area.

Russian practice is similar to the international practice classification of catering services. In the frames of section 'N' 'Hotels and Restaurants' National Classification of Economic Activities (NCEA), there are three groups with 55.3-55.5 codes: performance of restaurants (55.3), bars (55.4) and canteens at enterprises and institutions and delivery of catering products (55.5) [3, page 206-207].

For example, the group "performance of bars" includes the sale of beverages, manufacture and selling a large range of cocktails as well as appetizers and desserts for consumption on the premises (in bars, nightclubs, pubs and places of this type), sometimes accompanied by some form of entertainment.

In the implementation of statistical records it should be considered that in the 'N' section there might be the combination of types of performances. Thus, the sale of beverages is an independent activity, but it can be partially included in the activities of a restaurant or cafe. In this case, according to Russian

statistics methodological recommendations selling drinks will be classified together with the sale of culinary products in subclass 55.3 "Performance of restaurants."

Besides, performance of a restaurant, being as an independent type of activity, may also be included in the activities of placement. Indeed, any collective accommodation provides housing or temporary accommodation to tourists and other citizens. Thus it can only provide a place to stay, and may, along with the placement, provide additional services, including nutrition services.

Organization of public catering

Catering enterprises differ with a variety of forms. The industry of tourist food supply includes restaurants, cafes, snack bars and other facilities. Catering enterprises differ depending on the culture and quality of service, as well as dishes and an assortment of dishes, number of seats, mode, and visitors' experience. A number of criteria is used for the classification of tourist catering industry; the most important of which are:

- nature of the activity;
- location;
- contingent of tourists to be served;
- range of products and services (specialization);
- hall capacity;
- form of service;
- class of service;
- business hours.

Detailed description of all of these classification groups are widely represented in the relevant academic literature and is not the subject of this article. We should only note that the most popular with tourists are restaurants. They are divided into two large groups: the classic and fast service. A classic restaurant offers not only a wide range of complex and expensive meals, high quality service, but also presents a convenience for a long and comfortable communication with a partner, to the interior aesthetic pleasure. The most important characteristic of first class restaurants is the pursuit of individuality. Their unique shape is complemented by a luxurious interior furnishings and a gourmet kitchen.

Fast food restaurants (bistros, diners, «fast food») are widely spread today as the current pace of life does not allow much time to spend on food. They combine reasonable prices, good service, and variety of dishes. For the mass tourists, who save their money, visiting these restaurants is becoming a prerequisite of traveling.

Under the mode of tourist food supply the catering enterprises provide services in the form of full board, half board, a special diet, and nutrition

for children and so on. Number of hotels have rooms which include a kitchen, mini-bars and can provide catering services to the room (on-call request), as well as at the enterprises operating at hotels. The hotel's popular tourist segment (especially for Russian tourists) uses the «all included» system. The 'all included' is a set of services that are provided in the territory of the hotel for free and unlimited. These services are included in the price of the tourist product and apply to both for the use in a hotel infrastructure (in whole or in any part, including participation in the animation programs), and food and beverages.

It should be noted that in modern conditions such form of the organization of public catering as a catering service is widespread. Catering (from the English word cater – 'cater') - a sector of food service related to the provision of services to remote locations, i.e., catering services for employees of companies and individuals in the indoor and outdoor service.

Catering businesses also perform serving of various events and retail selling of ready culinary products. In practice, under the catering not only cooking and service is understood, but also the service, catering, decoration and many other related services. At the same time catering technologies can be used in tourism. For example, catering in airports and on aircraft boards is very often carried out by catering companies.

In this regard, we also should note that the catering on an aircraft board — is one of the most important factors when making tourist trips. There is an expert opinion that 70% of impressions drawn up by an airline passenger and a tour selected depend on what kind of food was offered and the way they served it during the flight. On the one hand, this is due to the natural human needs for food and often during long tiring flights.

On the other hand, food consumption can be considered as one of the few things available to passengers during their stay in a confined space. Therefore, the image of the carrier, as well as a tour operator who has concluded a contract with the carrier for the transport service of tourists, largely depends on how well this service is provided.

From the economic positions it is not the ration of food itself that is important, but the costs of its organization and the possible benefits of proper management in that area. So, a case has become known, where one of the two competing Russian regional airlines began offering snack boxes during short flights. As a result, passengers were more likely to use the services of this company.

Problems of statistical analysis of tourist food supply

In Russian and international classifications of catering services the division of these services by the

spheres of application is not envisaged, that is, there is no division of services for tourists and residents. Theoretically, this separation is possible, but practically to identify the share of tourists-consumers in the consumption structure of catering services, as well as provision of the evaluation of catering services for tourists, is very difficult.

Partly this problem can be solved if we consider catering facilities on the territory of Collective Accommodation Facilities (CAF). With certain reservations it might be assumed that tourists are all visitors to restaurants, cafes, bars, located at the CAF. According to a comprehensive survey of the tourist industry, conducted by the Russian Office of Statistics (Rosstat) in 2003, such facilities in Russia comprised 5194 units, of which 26.9% were hotel catering, and 73.1% — organizations specialized within the CAF [4, page 104].

Despite the strong growth of the catering market (opening of new cafes, fast-food, bistro, and so forth), the number of direct tourist catering facilities for such a big country as Russia, is not enough. If we compare the number of CAFs themselves with catering facilities within the CAF, it turns out that one CAF of a hotel type had 0.36 of catering facilities, and one specialized had 0.82. Thus, not all the accommodation facilities provided catering services. So, many non-categorized hotels, organizations of individual recreation, especially in the area of small business, had no owned or leased institutions (departments) of catering.

It should be noted that in 2009 the Russian Federal State Statistics Service (Rosstat) conducted a selected survey of performance of catering facilities in the tourism sector. 1170 organizations were surveyed, including not only the CAFs, but as well theaters, sports facilities, stations and so on. For each of these types of organizations parameters describing the situation with food have been calculated.

Table 1 contains the results of the survey in respect of only three types of organizations [5]. It is obvious that compared with the year of 2003 the situation has changed for the better. Thus, for each surveyed hotel there are 2.8 caterers. However, in this survey small businesses working in the tourist industry were not considered, among which there might not have been any registered catering facility.

Catering turnover is a key economic indicator of the food industry, which represents the proceeds from the sale and purchase of culinary products for the public for consumption on the premises, as well as for businesses and individual entrepreneurs to cater for different populations. According to the guidelines of the Russian Federal State Statistics Service (Rosstat) the catering turnover includes two elements [6]:

Table 1.
Key performance indicators of catering facilities in the tourism sector

Index	Type and number of the organizations surveyed		
	Hotels – 246	Railway stations, bus stations, ports, airports – 35	Specialized organizations of public catering – 670
Availability of public catering facilities, pieces	697	105	3123
Cafe	164	21	979
Restaurants	223	16	658
Canteens	46	8	692
Refreshment rooms	39	42	386
Bars	201	8	209
Snack Bars	24	10	199
Number of seats	44974	2067	226218
Service hall area for customers, thousand m ²	187,5	5,1	939,9
The average number of employees.	11490	978	56986
Revenues from the provision of public catering services, mln. rubles	7506,0	300,8	67512,1
Expenses for providing public catering services, mln. rubles	6223,8	291,6	45092,1
Rents, mln. rubles	226,5	5,1	5299,0

1. Cost of sold to individuals, mainly for consumption on the premises, own culinary products (food, culinary products, semi-finished products), beverage, bakery, confectionery, bakery products and other food products without cooking.

2. Cost of own culinary products and purchased food products sold (released) (to the):

- employees of organizations with subsequent retention of wages; certain categories of the population (students in schools, pensioners, etc.) with partial or full payment by social security authorities, by tokens, coupons, and so on;

- social institutions (schools, hospitals, health clinics, nursing homes, and so on);

- homes by orders of the population;
- by orders of organizations and individual employers to workplaces; transports routing on land, air and water, to serve at banquets, and so on.

For the purposes of current statistical observation the catering turnover is generated on the basis of the corresponding index of unified forms of federal statistical observation. The results of the observations are published in the official materials of the Rosstat and are accessible to a wide public. Figure 1 shows the

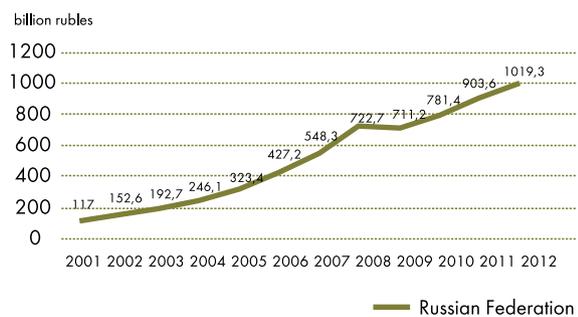


Fig. 1.
Dynamics of catering in the Russian Federation

dynamics of catering turnover in the Russian Federation. The growth of this indicator is obvious except the 2009 crisis year.

It is obvious that a certain part of catering turnover falls on tourists as well, since their holiday is not limited with the territory of a single hotel or boarding house. To identify that part with an absolute precision is not possible. However, in 2009 the Rosstat conducted an expert survey of catering managers, whose

purpose was to identify the proportion of the tourism component of the turnover of public catering [5].

Following the results of the survey it was revealed that the largest part falls on the bars — 20.9%, the lowest - on canteens (11.7%). Restaurants had 19.4% of tourist consumption, buffets — 15%, diners — 14.5% and cafes — 12.7%. If we take the minimum score as a basis, the turnover of the "tourist catering" according to our estimates, ranged 75-80 billion rubles in 2008–2010.

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