

SUPPLY CHAINS DIVERSITY AND PERSPECTIVES IN TOURIST CITIES¹

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ABSTRACT

Supply chains of goods are usually in the background of the main tourist activities, but the existence and success of the main tourist activities and services highly depend on them. The purpose of this paper is a) to highlight the role, diversity and complexity of supply chains in tourism and b) to indicate the perspectives for development of the supply chains within sustainable tourist cities. The paper also tackles the discrepancy in terminology between the literature bodies on tourism and the supply chain/logistics management. Some tourist forms, like event tourism, may put particular challenges in managing and performing such chains. To exemplify presented ideas, here are shown the selected characteristics of the supply chains for two major tourist events of the city of Novi Sad—the Agricultural Fair and the Exit music festival. According to the results, a new systematization of supply chains in tourism is proposed.

KEY WORDS: supply chain; tourist logistics; classification; city tourism; big events.

INTRODUCTION

In the tourist cities, tourism generates, both directly and indirectly, significant goods, materials and service flows, influencing also other sectors and industries. These supply chains may show high diversity in moved products,

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actors in supply chains, their role in tourism, time and spatial characteristics and constraints, direction of moved products and services, interconnectivity and relationships with other supply chains in tourism, etc.

The purpose of this paper is a) to highlight the diversity and complexity of supply chains which serve tourists and tourism and b) to indicate the developmental perspectives of supply chains of goods in tourist cities, which is often neglected in the literature. A particular focus is directed towards the selected characteristics of some very specific supply chains, i.e. on the event supply chains and reverse supply chains in waste management.

The paper is structured as follows. In the second Section, the terminology is briefly discussed. The term "supply chain" is usually used in the literature body on tourism to determine different chains than the ones in the literature on supply chain and logistics management. This terminology discrepancy and confusion is briefly highlighted in an attempt to identify the role and types of supply chains in tourist cities and, in a great extent, in tourism on the whole. In the third Section, the focus is on the specific supply chains of goods, which support big events in tourist cities. Such supply chains are considered as the suitable ones for the review of main supply chain characteristics. The case of Novi Sad is used to exemplify the diversity and complexity of supply chain of goods which supports such events. The discussion and proposed new classification of supply chains in tourism is given in the fourth Section. The last section contains final remarks about the supply chain developmental perspectives in tourist cities and conclusion.

SUPPLY CHAINS IN CITY TOURISM

In the literature on tourism, a consensus about the usage of the term "tourism supply chains" (TSCs) has not been reached yet (Dragan et al., 2018). Actually, three research streams are revealed. First, some authors use the term with an original meaning like in SCM and logistics literature (e.g. Véronneau and Roy, 2009). Others follow the stream where the tourism supply chain actors produce and deliver services to end customers (e.g. McKercher, 2016), which also may cause some ambiguous interpretations. The third research stream has the most comprehensive approach and their definition includes all supply chains which move and deliver goods and services generated for the purpose of tourism (e.g.

Peng et al., 2011, Tapper and Font, 2004, Oriade and Cameron 2016). This confusion obviously rises from the fact that even the term “tourism product” is still blurred (McKercher, 2016), because the supply chains are created to build and deliver such products to the end customers.

Tapper and Font (2004) point out that TSCs include all suppliers of goods and services whether or not they are directly contracted by tour operators or by their agents (including ground handlers) or suppliers (including accommodation providers). Some papers differentiate flow items in a multi-tiered supply chain, where physical flows exist in upstream and midstream tiers, whereas the service flows exist in downstream tiers (Huang et al., 2012, Lee and Fernando, 2015).

To avoid misunderstandings, here is proposed clear differentiation between tourism supply chains (TSCs), and supply chains (of materials and goods) which support tourism (SCs), whereas both of them are referred to as supply chains in tourism (SCsT). The term “tourism supply chain” usually comprises the chains and actors focused on delivering *service* to the end customer by the tourism entities, which are: travel agencies, (passenger) transportation companies, recreation firms, attractions and the destination organization sector, tour operators as well as accommodating, food and beverage companies, etc. (Dragan et al., 2018, Witt et al., 2013), coming from both the private and the public sector (Zhang et al., 2009).

On the other side, proposed term “supply chains which support tourism” (SCs) encapsulates all supply chains which move materials, energy, goods and related information from the point of origin to the point of destination in both directions, whereby the end customers are entities which provide tourist service, or tourists and visitors by themselves. The former part is in accordance with the traditional definitions of supply chains in the supply chain management and logistics literature (e.g. compare with Chopra and Meindl, 2004, p. 4, Simchi-Levi et al., 2008, p. 1, CSCMP, 2013, p. 186). The specificity is that these chains serve to the tourism by supplying all tiers and actors in TSCs, including the tourists and visitors as end-customers. TSCs and tourism on the whole could not exist without the SCs; both of them constitute the overall system of SCsT. Within the SCsT, the flows of goods and services may be overlapped, consecutively interconnected, or partly or completely separated.

Cities offer various forms of tourism and urban tourism record continuous growth. In the recent period, urban tourism has recorded faster development than the national tourism in EU countries (ECM, 2016). Tourists and visitors generate additional flows of materials, goods and waste in cities. In many cases, the structure of such flows is the same as for the city residents, which makes the blurred boundary of supply network (Judd and Fainstein, 1999). Tourists and visitors are consumers which mainly impact the volume and, in the less extent, the structure of existing supply chains in city logistics. However, they may also generate some new flows, with non-typical demands for the residents. Such flows are usually related to some specific forms of tourism, and to different attractions. Among them, the event tourism may be of particular interest for transport and logistics industry. Big events attract significant number of tourists, and they are particularly important for small and medium cities. Failings in organization of traditional events leads to decreased number of visitors in the forthcoming period and ultimately may impact the hosting of future events.

Big events also generate significant physical flows and involve numerous actors in customized supply chains; thus, they usually require highly developed skills and experience of event managers. While the cultural or hotel tourism may record more “sprawled” tourists’ and visitors’ demands during the season, big events concentrate them within a few days. However, planning and organizational activities for these few days may take several months or even more. These activities are often in the background. The complexity and importance of SCs and related transport and logistics activities for tourism are often not enough understood.

To illustrate presented ideas, the main characteristics of supply chains for two major events in the city of Novi Sad will be described in the next section.

THE DIVERSITY AND COMPLEXITY OF SUPPLY CHAINS WHICH SUPPORT BIG EVENTS – TWO EXAMPLES FROM NOVI SAD

Novi Sad is the medium-sized tourist city. It is the second largest city in the Republic of Serbia, and the administrative, educational, scientific, economic and cultural centre of the province of Vojvodina. Many events are organized during the whole year, but the couple of them use to cause a significant peaks in the recorded number of tourists. The two most important tourist events for Novi Sad

are the Agricultural Fair and the music festival Exit. The main characteristics of supply chains which support these events will be briefly overviewed.

The details about the Agricultural Fair were obtained from the Fair Postshow report (2018) and after the interview with the management representative of the Public Enterprise “Sajam” (“Fair“) in Novi Sad. The details about the supply chain characteristics were obtained during the fair, in interviews with several big exhibitors. The data about the waste chains generated by the Exit festival were collected from the official websites of involved companies.

Supply chains for International Agricultural Fair

Traditionally, the highest number of tourists in Novi Sad has been for decades recorded in May (TONS², 2018). The reason is the International Agricultural Fair, which is one of the largest and most important agro event in the Central and South-eastern Europe (Fair Postshow report, 2018). During the eighty five years, it is the top representative event of Novi Sad, Vojvodina and Serbia.

In 2018, the products from 60 countries were exhibited there, while the direct exhibitors, companies and businesses registered for direct appearance at the Fair came from 30 countries. In the same year, the total number of exhibitors was 1500, whereas the total number of recorded visitors was 140000. The total space for exhibitions (open and closed) was 58000 m².

As there is not available a unique and comprehensive database about the characteristics of supply chains which support the exhibition, according to the available data from the official fair report, a personal insight and the interviews with some exhibitors during the fair, the basic characteristics of supply chains which support the exhibition will be summarized and briefly explained.

The first characteristic of the supply chains which supported this important event is a *variety*. The exhibition usually shows a high diversity in types of products: from the living pets, stock and plants, to the perishable products, to the dangerous goods (pesticides etc.) and agricultural vehicles and equipment, some of those being oversized and heavy vehicles and related equipment. Different types of products have different logistic requirements in transport, handling and

²TONS - Tourist organization of Novi Sad.

storage to reach the destination in right volume, quantity, condition and time. The geographic coverage of supply chains also varied from the locally oriented, to the national, international and the global ones. In total, the exhibitors (and their exhibits) came from 30 countries and three continents. Additionally, some exhibitors presented products from other countries and business partners, and thus increased the variety, but also the complexity of own supply network.

The *complexity* of supply chains is their second characteristic. The international supply chains include many actors, logistics intermediaries (freight forwarders, transport agents, brokers, customs agents etc.), insurance companies, carriers of all types of transport. In case of agricultural products, as a rule, some inspections have to be involved into the chains. Oversized or overweighted vehicles and equipment also need special permissions and licences. Due to the geographic coverage and the variety of exhibits, it could be supposed that all transport modes were used in transporting goods from all over the world. On the longer distances, the multimodal transport is often the best solution, which includes not only an increasing number of carriers, but also handling operations, warehousing, port or airport operations, etc. The cities often have restricted areas for heavy vehicles and the "last mile" routing is usually strictly defined in such cases.

In some cases, one big freight forwarder is a logistics intermediary exclusively responsible for the big event on behalf of organizer. In the case of the Agricultural fair, although the fair had the official freight forwarder, in many cases exhibitors had their own freight forwarders responsible for all logistics operations. From the viewpoint of the big event managers, the organizer's responsibility for supply chains may be relaxed in this approach, but the challenges in coordination may increase.

The third important characteristic of the fair supply chains is the *timeliness*. All the exhibits and the exhibition stands have to be ready for the exhibition practically in the same time. Their arrival, unloading, unpacking, sometimes temporary warehousing (of exhibits, packaging or the both) within the fair, placing and arranging on the exhibition stands have to be highly coordinated within a couple of days (Stojanović, 2017).

The uncertain “*end-customer*” and, consequently, *the final destination* is the next characteristic of the exhibition supply chains. Before the fair, the points of shipments departure are known, but the end customer may be the visitor, the exhibitor himself/herself, or any third party (e.g. the fair equipment provider). If the exhibited products are sold, the visitors pay the price of moving goods. In some cases (international flows), in that moment the goods have to pass import customs clearance procedure. Otherwise, the exhibits are returned to the point of origin, whereas all logistics costs are covered by exhibitors, as a hopefully good investment. The unknown final destination is also related to the next characteristic of supply chains.

The supply chains generated for the purpose of the fair exhibition also show the variety of chain *extension*. They may be both, direct and extended supply chains, containing both direct and reverse flows (Stojanović, 2017). Direct supply chains mean that the visitor buys the product. Again, in case of international supply chains, this situation assumes completed customs clearance and all related activities. If exhibits are temporarily imported for the purpose of the exhibition, they have to be returned in the same condition, number, volume and value to the place of departure, respecting the legal deadlines. The return flows are usual for several types of big events – fairs, music concerts, sport events, temporary museum exhibitions etc. All logistics operations preceding such events are realized in the opposite direction after the events (packaging exhibits, transport scheduling, loading, etc.). Also, all big events have significantly generated waste flows, which are also a kind of reverse flows. They will be additionally discussed later.

The last important specific feature of the supply chains are *demands temporal characteristics*. The services and product demands in tourism are usually non stationary and show seasonality. This seasonality is even more extreme in the case of big events. However, if the events have a long tradition, like exhibitions, they may be relatively well forecasted. As demands are highly seasonal, necessary logistics capacities and resources are usually outsourced by event managers. In case that a city has developed fair tradition and the significant exhibitions all over the year, long term contracts or event manager’s own-account logistics resources may be a reasonable solution.

Exit festival

Music festivals are the most visited tourist events in Serbia (ProdanovićStamenović, 2015). Since 2000, Novi Sad is the home to the EXIT festival, the one of the biggest music summer festival in Serbia and the region and two times officially the Best Major European festival. In 2018, 1000 national and international music stars set to perform at more than 40 festival zones during the four days in July. The festival is placed every year at the Petrovaradin fortress, which covers 112 hectare and thus it is quite capable of providing the technical conditions, the unique environment and the atmosphere for such a huge event.

The supply chains and related logistics support for such kind of music festival has many similarities with the one described for the Agricultural fair. However, it could be worthy to notice an increased demand for in-time waste removal. The waste removal generates reverse chains. Its incremental importance for the cities and tourists is usually recorded when the service does not meet demands and expectations. Particularly, the overcrowding in tourism may create challenges in terms of waste management (McKinsey & Company and World Travel & Tourism Council, 2017).

During the big events, the municipality enterprises responsible for waste removal usually face additional organizational challenges. In 2018, during and after the festival, the public waste management enterprise collected and removed about 70 tonnes of waste, which was 10 tonnes (14%) more than last year (Source: JKP Čistoća, 2018). As the festival program lasts during the whole night, and the citizens, but also the visitors should not be disturbed with the waste collection activities, everything has to be performed within a very constrained time framework in the early morning hours. The waste has to be completely collected and removed from a large area, which does not cover only the fortress, but also the attractive places in the surrounding (e.g. the downtown, Danube river bank). The organization of such operations is always challenging. The quantity of waste cannot be always well predicted before the event, although the existing time series and expected number of visitors may be helpful. However, these operations have got a high priority, in accordance with the significance of the event for the city. Additional human and technical resources have to be planned, organized, scheduled, and coordinated to collect, transport,

select and treat the significant additional amounts of the waste before, during and immediately after the event.

Additionally, over the past several years, the festival organizers, together with several public and private enterprises and NGOs promoted the separate waste collection, whereas the money of such activities were dedicated for the humanitarian purposes (Greentech, 2015). The reaction was fine. In 2015, cca. 20000 visitors collected about 7000 PET bottles and 15 000 aluminium cans for recycling. Several collecting points were placed at the Petrovaradin Fortress, as well as within the Exit camp (Štrand beach). The participants were rewarded based on amount of donated material with campaign badges, aluminium can openers and bags. Exit Camp guests coming from abroad were massively involved in the campaign, stating to the promoters that waste separation for recycling is developed in the countries they came from, being glad to actually have the opportunity to contribute to environmental protection as well as to participate in the humanitarian campaign in the EXIT Festival (ibid.).

Practically, the completely new reverse chains were designed and organized, the flows are generated and the visitors have been actively involved. This is an example how environmental campaigns may target the multiple goals, covering the humanitarian, environmental, educational, promotional and social aspects, increase the visitors' satisfaction and reach the synergy effects.

THE PROPOSED SUPPLY CHAIN CLASSIFICATION

Following the theoretical considerations and a case study results presented in the previous sections, a classification of supply chains is proposed (Figure 1). The classification is a result of the literature review and empirical analysis of selected SCs generated by two big events in a tourist city.

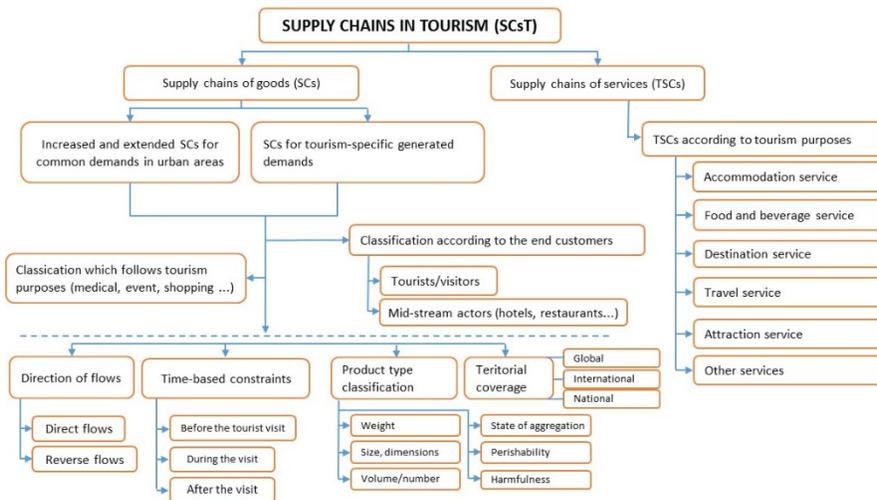


Figure 1. The classification of SCsT

Although the empirical part of analysis is focused on the SCs in tourist cities, according to the literature analysis, the classification could be in a great extent generalized for all SCsT. The first stage includes division of all supply chains on chains of goods and chains of services. The TSCs were not in the focus of this paper. However, the classification of service chains is proposed according to the work of Tapper and Font (2004) and Zhang et al. (2009). The term “destination” is used in a same way as in WTO (2016), where it means “local destination”³. Each sublevel comprises TSCs with actors and flows within and between the actors of presented tourism sector. This classification could be more derived in the future. For example, the products are the ones among several main characteristics of supply chains. The more detailed analysis could combine taxonomy of tourist products given in (McKercher, 2016) with actors in supply chains.

In the next step, among the SCs one can differentiate the chains of goods and materials which already exist for the city residents and other business

³Mrnjavac (2002) did not limit the geographical coverage of the term, and pointed out that in some cases the whole country may be the destination. Such interpretation also supports the generalization of proposed classification.

sectors, and those ones which are generated only for the tourists' purposes. The main difference between the two types of supply chains is that the tourists primarily impact the volume of former, but completely generate the later ones. The tourists share and/or compete with residents and other users for many services, spaces, and amenities (Pearce, 2001). In many cases they have the same or similar demands from the city logistics perspective. For example, tourists and other visitors also buy food, drink, clothes as well as the residents. The food and beverage supply in the city may come from the same distribution centres and could be transported by the same express and courier companies. Shopping malls and hypermarkets are the big attractors for both, residents and visitors. Both of them generate municipality waste. Even the same furniture may be used as the equipment for travel agencies, hotels, etc. and for other businesses sectors in the city. However, tourism may impact not only the volume of flows, but also the diversity of products, involved actors in supply chains and other characteristics of these supply chains.

All SCs may be further divided according to the purpose of tourism and according to their end customers in network. The main purpose of tourism impacts the characteristics of related supply chains, their volume, structure and moved materials and goods. The supply chains generated by demands from tourism sector may differ each from others following tourism forms, e.g. medical tourism, hotel tourism, event and conference tourism, culinary tourism (food and beverage), etc. Also, the same SCs may be divided according to their end-customers. They could be dedicated to meet tourists and visitors demands (e.g. in supply of souvenirs, crafts, cloths, consumables, etc.), or to supply different midstream and downstream actors which offer tourist services to the tourists – hotels, restaurants, tourist attractions, tour operators, travel agencies, transport companies, etc.

Both of the main types of SCs may further be divided according to different criteria – flows direction, the generating time (regarding visitors' demands), goods and shipment characteristics, the temporal characteristics and constraints of demands and network geographical coverage.

From the logistics viewpoint, the transported goods have a high variety of characteristics which impact on their handling, storing and transport. Therefore, the last proposed classification is according to the type of the (final) products.

The products dictate the logistic demands, and often the supply chain strategy on a whole.

In a great extent, TSCnetwork is coinciding with the urbanSC network. The selling of service in the tourism sector is often coupled with the selling or providing some physical products. Restaurants and hotels sell food and beverage, destinations; tour operators and travel agencies distribute promotional stuff; hotels and tourist attractions sell or provide different consumables, leaflets, promotional stuff etc. The overlapping of the TSCs and SCs in medical tourism is already discussed in the previous section. Similar examples may be found in other forms of tourism. On the other side, some SCs may live their own lives in meeting tourists' needs.

Regarding the temporal coordination, the SCs may precede the TSCs, go hand in hand between the same actors, or be realized after the TSCs. Before the tourists' visits, most of the physical items are delivered to the industry actors in the mid and downstream of the SCsT. Very rarely, tourists may have some unexpected or expected requests which should be met immediately during the visit, but such flows are also possible (e.g. unexpected moving goods and people during disasters, etc.). Finally, after the visit, a majority of flows are reverse and include non-consumed items, returned exhibits from events, or waste removal.

Proposed classification is, to the best of the author's knowledge, the first attempt to classify all supply chains in tourism according to different criteria used in tourism and supply chain and logistics management literature, or regarding the relationship between the TSCs and SCs. Further research may improve overall classification by introducing new criteria of importance for describing the nature of the SCsT, or by using more sophisticated classifications within some of the proposed criteria. The classification of the SCs was in the focus of this research and particular improvement may be related to the TSCs classification. The SCs classification is mostly derived by analysing SCs diversity for two big events in the tourist city.

FINAL REMARKS ON PERSPECTIVES AND CONCLUSION

The linkage between transport, logistics and tourism is undeveloped both in research and in policy. Transport scholars have already noticed the gap between

the transport and tourism research communities, lack of common research, different research aspects and focuses, as well as different terminology (Mondou and Pébarthe-Désiré, 2013, Landré and Peeters 2011, Gülsün et al., 2015). Similar situation may be noticed from the perspective of logistics and supply chain scholars. This research is an attempt to bridge this gap. Proposed classification was made according to the literature review from both fields and empirical analysis of SCs was conducted for the purpose of two big events.

An important part of the tourists' city experience is out of the service of tourism (Wearing and Foley, 2017). Supply chains which support tourism service significantly contribute to this experience, especially if they fail to meet tourists' demands, or exceed their expectations.

The city tourism has recorded a steadily growth in the last decade (WTO, 2017) and this trend will probably be continued. Therefore, it could be expected that the supply chains which support tourism activities will also record an increase and become more and more important. SCs in tourist cities may be very complex and diverse in nature. If a city records tourism growth, it will also experience the increase in volume and complexity of SCs. The increase in variety of SCs is usually related to introducing new attractions, or new logistics concepts.

Beside big cities, many small and medium tourist cities will also continue to experience tourism growth. In such cities, city logistics and traffic planning should also be conceptually connected with the tourism development. Researchers from different fields and city stakeholders should closely cooperate in proactive and sustainable city development planning. The city stakeholders, which are the representatives of municipality, traffic planners, city logistics planners, city tourism organizations, institutions and enterprises, should be formally and informally networked for the purpose of sustainable city development. The innovative solutions within the smart city concept may be a suitable ground for it. The one of the first connections between supply chains and Smart Cities is transportation (MHI Solutions, 2017). Efficient managing of residents and tourists mobility, as well as the routing of goods they consume, should minimize congestion, fuel waste and carbon emissions, and provide a critical ground for safety, accessibility and quality of life in tourist cities.

Big events are very important for small- and medium-sized cities. The generated flows of tourists and supply chains which support tourist events significantly impact the residents. Such events require a high level of collaboration and coordination among the parties in supply network, particularly in nodes where TSCs and SCs are faced. New technologies, like the big data, open data, and sharing resources may create new opportunities for event organizers, but also for all other stakeholders involved in SCs in tourist cities. The smart city solutions was, up to now, mostly limited on applications for the residents/tourists' purpose. However, this database may be enriched and combined with the data about moving goods. Moreover, the same data may be also used to support smart and sustainable city development, by using a holistic approach and integrated efforts of all stakeholders.

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