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e-mail: smalborys@gmail.com; ORCID ID: 0000-0001-8586-8404***DEVELOPMENT OF THE HOSPITALITY INDUSTRY IN MODERN CONDITIONS:
TRENDS AND MEASURES TO STRENGTHEN COMPETITIVE ADVANTAGES**

Abstract. The article is devoted to the study of trends in the development of the hospitality industry in the regions of Ukraine. The content and significance of the hospitality industry in the social and economic development of the regions are considered. The content of the studied definitions is determined; approaches to determining the relationship between the concepts of «hospitality industry» and «tourism industry» are generalized and formulated. The main indicators that characterize the consumption of services in the hospitality industry are determined. It is proved that the main such indicators are the contribution of the tourism industry to GDP, the volume of tourist tax. It is determined that the state and development of the hospitality industry also characterize the volume of capital investments by types of economic activity in the field of temporary accommodation and catering. The analysis of these indicators in dynamics and in the regional context is carried out. Trends in the development of the hospitality industry in modern conditions are described. Significant regional differentiations in the payment of tourist fees in Ukraine were revealed, as well as a decrease in almost all indicators of the development of the hospitality industry. Data from the World Travel and Tourism Council on the state of the hospitality industry in Ukraine are analysed. A reduction in the total contribution of travel and tourism to employment in Ukraine in 2020 to 6.3% was revealed. Directions and measures to strengthen the competitive advantages of the hospitality industry in the regions of Ukraine are identified.

The conditions of activity of business entities of the hospitality industry are defined, which include flexibility and the ability to quickly adapt to modern market conditions, the introduction of safety and hygiene measures, optimization of business forms, the development of digital technologies, strengthening the role of healthy food, expanding the range of products and services of tourist regions, the rapid development of delivery services, orientation to environmental activities, strengthening the requirements for personnel qualifications, etc.

It is proved that promising areas of increasing the competitive advantages of the hospitality industry in modern conditions are increasing the level of financing of the industry, intensifying the efforts of local governments to target the use of funds from the tourist fee on the ground, as well as the use of tools for strategizing and programming the development of the hospitality industry in regions, combining industry stakeholders into clusters, alliances, and so on.

Keywords: competitive advantages, hospitality industry, regional development, tourist tax.

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РОЗВИТОК ІНДУСТРІЇ ГОСТИННОСТІ В СУЧАСНИХ УМОВАХ: ТЕНДЕНЦІЇ ТА ЗАХОДИ ПОСИЛЕННЯ КОНКУРЕНТНИХ ПЕРЕВАГ

Анотація. Присвячено дослідженню тенденцій розвитку індустрії гостинності в регіонах України. Розглянуто зміст та значення індустрії гостинності в соціально-економічному розвитку регіонів. Визначено зміст досліджуваних дефініцій, узагальнено та сформульовано підходи до визначення співвідношень понять «індустрія гостинності» й «індустрія туризму». Визначено основні показники, що характеризують споживання послуг індустрії гостинності. Доведено що основними такими показниками є внесок індустрії туризму у ВВП, обсяги туристичного збору. Визначено, що стан і розвиток індустрії гостинності характеризують також обсяги капітальних інвестицій за видами економічної діяльності у сфері тимчасового розміщення та організації харчування. Проведено аналіз зазначених показників у динаміці та в регіональному розрізі. Охарактеризовано тенденції розвитку індустрії гостинності в сучасних умовах. Виявлено суттєві регіональні диференціації щодо сплати туристичного збору в Україні, а також зниження майже всіх показників розвитку індустрії гостинності. Проаналізовано дані Всесвітньої ради з подорожей і туризму щодо стану індустрії гостинності в Україні. Виявлено скорочення загального внеску подорожей і туризму в зайнятість України 2020 року до 6,3 %. Визначено напрями і заходи посилення конкурентних переваг індустрії гостинності в регіонах України.

Визначено умови діяльності суб'єктів господарювання індустрії гостинності, до яких віднесено гнучкість і здатність швидко адаптуватися до сучасних умов ринку, упровадження заходів безпеки та гігієни, оптимізації форм підприємницької діяльності, розвиток цифрових технологій, посилення ролі здорового харчування, розширення асортименту продукції та послуг туристичних регіонів, швидкий розвиток послуг доставки, орієнтація на екологічну діяльність, посилення вимоги до кваліфікації персоналу тощо.

Доведено, що перспективними напрями підвищення конкурентних переваг індустрії гостинності в сучасних умовах є підвищення рівня фінансування галузі, активізація зусиль органів місцевого самоврядування щодо цільового використання коштів від туристичного збору на місцях, а також застосування інструментів стратегування та програмування розвитку індустрії гостинності регіонів, об'єднання стейкхолдерів індустрії в кластери, альянси тощо.

Ключові слова: конкурентні переваги, індустрія гостинності, регіональний розвиток, туристичний збір.

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Introduction. The hospitality industry has always been one of the main elements of social and economic development of the regions. However, in terms of the pace of its development in Ukraine, the hospitality industry occupies insignificant ratings at the level of the global tourism market. Today, in the difficult conditions of development of the hospitality industry in Ukraine, there is a lag in the pace of implementation of measures to support business entities of the industry under study, which threatens the competitiveness of the hospitality industry in the global market [1]. In such a situation, it is relevant to study trends in the development of the hospitality industry in modern conditions and search for optimal ways to strengthen its competitive advantages in the

regions. The influence of factors that create obstacles to its development and spread at a significant pace (the spread of the COVID-19 pandemic, economic and political crises, impoverishment of the population, etc.) should be taken into account.

Research analysis and problem statement. Theoretical and practical aspects of the analysis of the main indicators of the hospitality industry in Ukraine and the world are covered in the works of a significant number of Ukrainian and foreign scientists. Thus, the analysis of the world experience in the development of the hospitality industry is highlighted in the works of O. Dyshkantiuk, L. Potomkina, K. Vlasiuk [6], which defines two main approaches to overcoming the modern crisis in the development of the hospitality industry (available credit lines and deferred payment of tax and debt obligations).

The problem of developing the hospitality industry under the influence of the COVID-19 pandemic is discussed in modern literature and occupies an important place in more works of scientists, including N. Korzh, N. Onishchuk [7]. In their works, researchers study the activities of hotel farms in the context of the spread of the COVID-19 pandemic and suggest ways to transform the economy under study. Scientists T. Charkina, L. Martseniuk, V. Zadoia, A. Pikulina [13] prove the expediency of introducing tools for strategizing and programming the hospitality industry to get business entities out of the crisis in new quarantine conditions.

Economic aspects of the development of the tourism industry in the region based on the study and implementation of best practices and world business experience are considered in their works by A. Baula, A. Liutak, L. Chepurda, G. Chepurda, A. Zelinska [2], offering a number of financial instruments for the development of the tourism market of Ukraine. Modern trends in the development of the hospitality industry are considered in the work of N. Balatska [1], which presents an analysis of the development of the restaurant business and proves the feasibility of using internet technologies and introducing alternative online services to repurpose the operating mode of restaurant establishments.

In addition, official publications of the World Tourism Organization, the World Council for tourism and travel, the National Tourism Organization of Ukraine are also valuable information sources for revealing the topic, which make it possible to further analyse and compare trends in the development of the hospitality industry both in dynamics and in the regional context. Financial and economic problems of the development of the hospitality industry are raised in the works of modern scientists. However, some issues related to the search for competitive advantages of the hospitality industry in modern conditions, overcoming the negative phenomena of the pandemic in general and financial support for the development of tourist regions remain unresolved and require detailed study.

At the same time, the peculiarities of the prospects for the development of the hospitality industry in the regions of Ukraine and the search for optimal ways to strengthen their competitive advantages in modern development conditions require further scientific substantiation.

Research methods. In the course of organizing and conducting the study, general scientific and special methods were used, such as analysis, synthesis, comparison, and identification of factors influencing the state and development of the hospitality industry. Using the structural and logical method, a vision of a number of competitive advantages of the hospitality industry in the regions of Ukraine is presented, which it is advisable to develop in modern conditions.

The purpose of the publication is to analyse trends in the development of the hospitality industry in Ukraine and, based on the analysis, substantiate the directions of strengthening the competitive advantages of the industry under study in the regions of Ukraine in modern conditions.

Research results. The spread of modern factors influencing the development of the hospitality industry has changed the activities of business entities both in Ukraine and in the world. It is important, given the subject of the study, to determine a clear idea of the content of the category «hospitality industry» and the subjects of providing such services to the industry. Most scientists identify the concepts of the hospitality industry and the tourism industry. Often, in the works there are interpretations of the hospitality industry from the point of view of a system that combines the tourist, hotel and restaurant business, the organization of various event and

entertainment events [8]. By R. Breimer, the hospitality industry is a meaningful concept that includes numerous forms of entrepreneurial activity to provide various services for the reception of guests and tourists [12].

With this in mind, the hospitality industry includes accommodation, food, culture and leisure businesses. In her work, I. Yehupova divides all consumers of services in the hospitality and tourism industries into the following categories: tourists, tourists, people on a business trip and local residents [4]. In the modern economic literature, the concept of the hospitality industry is often found in a broader sense and includes subjects of hotel, restaurant, tourism business, as well as subjects for providing various types of recreation and entertainment services.

From the above, we can conclude that the hospitality industry meaningfully includes the provision of comprehensive services to consumers of the tourist market of the region and is characterized by specific features of the regions themselves. Classically, hospitality is about serving guests and providing them with priority services (accommodation and meals). In turn, the tourism industry, in a narrow sense, is associated with the organization of travel. A tourist product (package of tourist services) classically includes accommodation and food services. However, food and accommodation services are provided not only to tourists and guests of the region, but also to local residents. Based on this, the hospitality industry and the tourism industry should be considered as interrelated, but independent components of the socio-economic development of the regions.

To consider the main trends in the development of the hospitality industry in the regions of Ukraine and find ways to increase their competitive advantages, we will analyse the main indicators of the studied processes.

One of the indicators of the development of the hospitality industry is the impact of tourism on GDP, which characterizes the economic and social development of the territory. According to research by the World Travel and Tourism Council, this contribution in most countries is mostly insufficient and has negative trends in recent years. Research shows that the total contribution of tourism to our country's GDP in 2018 was 5.43% or 184.2 billion. direct spending of tourists amounted to 1.44% of GDP [14]. In 2019, this figure was 6.3%, and in 2020 it decreased to 3.4 %. This is explained by the curtailment of the activities of a significant number of business entities in the hospitality industry. A similar situation is observed with the impact of tourism on global GDP. According to the report of the World Tourism and Travel Council, in 2019 the contribution of tourism to the world's GDP was 10.4% (99.2 trillion), in 2020 it decreased to 5.5%, which is natural primarily due to quarantine restrictions (*Fig. 1*).

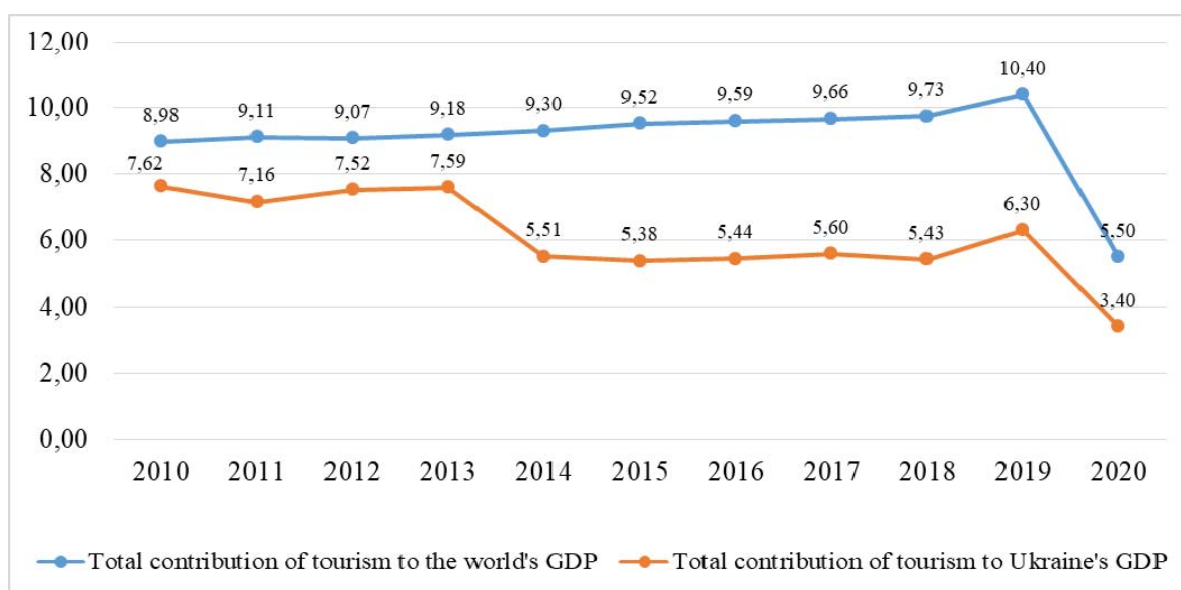


Fig. 1. Total contribution of tourism to the GDP of the world and Ukraine, %
Source. [14].

Thus, in 2020, the industry lost almost 4.5 trillion dollars, and the contribution of tourism to global GDP decreased by 49% [5]. Before the spread of the pandemic, the hospitality industry accounted for one job out of four newly created in the world, or 10.6% of all jobs — 334 million. In 2020, the global tourism industry lost 18.5% of jobs, which is almost 62 million people. According to official data, their number in the global industry is 272 million. In addition, in 2020, the costs of travellers in the middle of their countries decreased by 45%, and the costs of traveling outside the country — by almost 70% [12].

The analysis of employment in the Ukrainian hospitality industry also shows negative trends. Thus, the total contribution of tourism to employment in Ukraine in 2020 decreased to 6.3% against 6.9% in 2019. A sharp decline in business and tourism activity, incomes of the population of Ukraine, deterioration of the socio-economic state of most regions, unstable political situation, all this led to a rapid drop in the share of tourism in Ukraine’s GDP.

In our opinion, the threat of losing even more jobs remains. Therefore, it is important to apply effective tools to stimulate the development of the hospitality industry, especially in tourist regions. Most countries actively encourage the preservation of the hospitality industry and help business entities continue their activities.

The state and development of the hospitality industry can be analysed using the volume of tourist fees, which characterizes the real state of the industry in the region and is characterized not only by the number of tourists, but also by the time they spend within tourist destinations and the amount of money spent during the trip. The tourist fee is levied on tourists by the authorities in the region in order to invest in the development of the region's hospitality industry [8]. The tourist fee is paid by guests and tourists of the region who live in hotels, visit museums, etc. and are not in the region for business trips. The dynamics of tourist tax volumes in the regions of Ukraine during 2018—2020 is shown in *Fig. 2*.

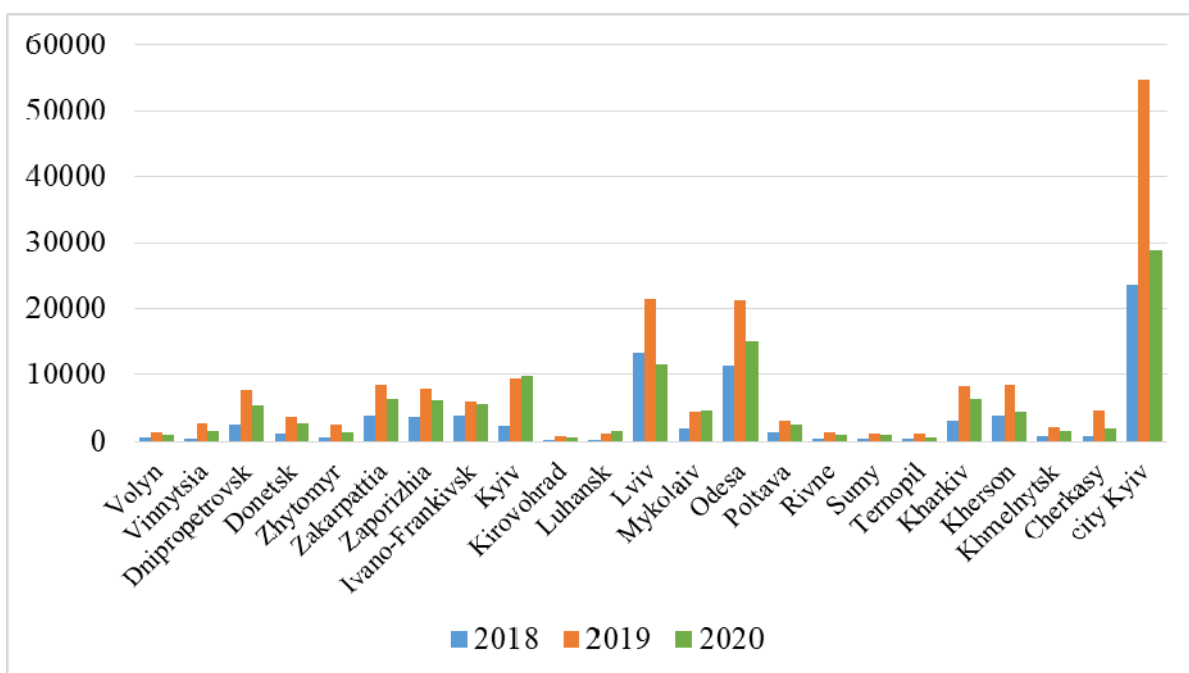


Fig. 2. Tourist tax volumes by region for the period 2018—2020

Source. [8].

Statistics on the payment of tourist fees in the context of regions of Ukraine showed significant regional imbalances. The leading regions in this indicator are Kiev, Lviv and Odesa regions. The total amount of revenues from the tourist tax to local budgets in 2020 amounted to about 130 million UAH, which is 34% less than in 2019 (more than 196 million UAH). However, some regions of Ukraine in 2020 showed positive dynamics compared to 2019 (Luhansk +33.8%,

Mykolaiv +7.1% and Kiev +4.9%). Volyn region in 2020 occupied the nineteenth position in the rating with a total tourist tax of 1044.63 thousand UAH [11].

To analyse the current problems of the hospitality industry of our state, we propose to consider the dynamics of capital investment by type of economic activity in the field of temporary accommodation and catering (Fig. 3).

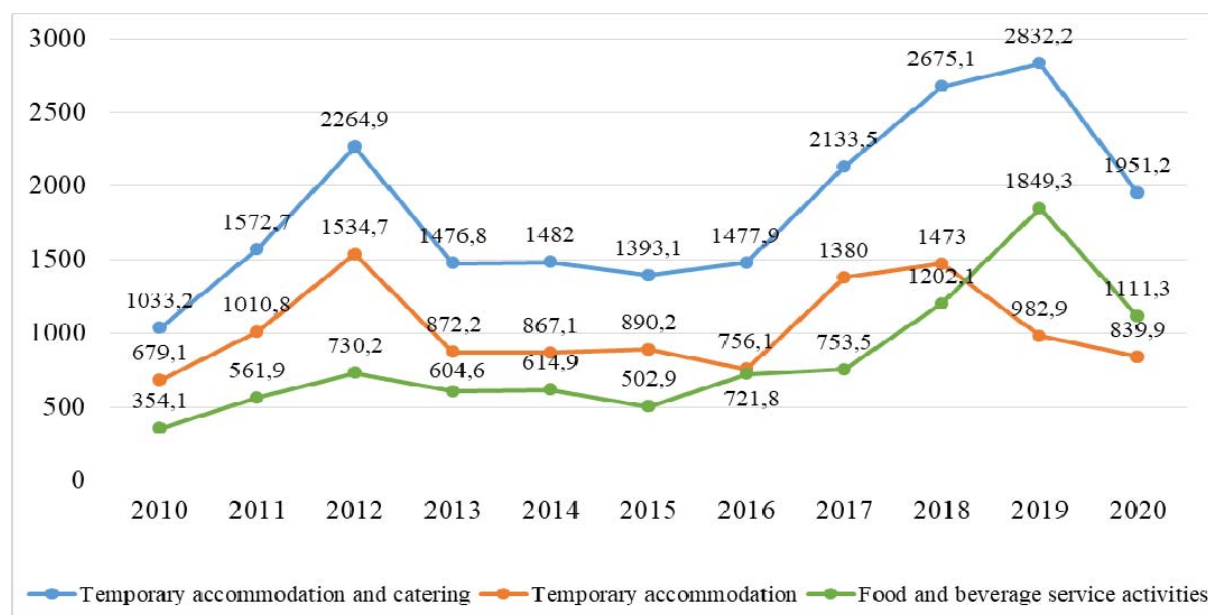


Fig. 3. Volume of capital investments by type of economic activity in the field of temporary accommodation and catering, mln UAH

Source. [11].

Graphical analysis of the volume of capital investments of Ukraine by types of economic activity in the field of temporary accommodation and catering shows a direct dependence on a number of external and internal factors, as well as the holding of large-scale events in the country (EURO 2012 World Football Championship, Eurovision Song Contest, etc.). Thus, the increase in funding for the development of the hospitality industry occurred exclusively during the period of large-scale events.

Regional analysis of the level of investment in the hospitality industry (accommodation and catering facilities) shows quite significant regional imbalances. So, during 2020, the leading regions in terms of the studied indicators are traditionally Kiev, Odesa (314092 thousand UAH) and Lviv (188420 thousand UAH) regions (Table).

Table

Indicators of the hospitality industry in the regions of Ukraine as of 01.01.2021

Region	Number of tourists, total persons	Number of tour operators and tour agents, legal entities	Cost of sold travel packages, thousand UAH	Number of hotel facilities, units	Investment in temporary accommodation and catering, thousand UAH
Ukraine	1957410	1561	27617877,3	1337	1951234
Vinnitsia	7936	19	52536,8	10	2937
Volyn	2726	13	34676,5	36	4818
Dnipropetrovsk	22611	109	344970,6	87	105134
Donetsk	10324	26	105291,1	65	18517
Zhytomyr	5052	16	67425,7	16	к/с
Zakarpattia	7893	22	70859,9	48	8384
Zaporizhia	17984	57	240077,1	119	115090
Ivano-Frankivsk	54864	25	262272,0	50	13398
Kyiv	14086	47	228751,0	80	36117

Table (continued)

Region	Number of tourists, total persons	Number of tour operators and tour agents, legal entities	Cost of sold travel packages, thousand UAH	Number of hotel facilities, units	Investment in temporary accommodation and catering, thousand UAH
Kirovohrad	1937	13	32987,7	20	1046
Luhansk	404	6	6057,2	7	к/с
Lviv	52690	97	486502,9	111	188420
Mykolaiv	2890	20	54945,4	83	1892
Odesa	14948	92	196519,6	147	314092
Potava	2660	14	31809,7	43	13026
Rivne	5186	28	63927,0	13	1544
Sumy	4199	17	44850,3	17	2803
Ternopil	2318	14	23853,7	13	7388
Kharkiv	18164	84	243994,3	66	13227
Kherson	2426	8	12643,7	70	7398
Khmelnyskyi	5312	18	52111,1	28	1743
Cherkasy	1811	20	22551,5	43	7093
Chernivtsi	4555	28	52989,4	11	296
Cernihiv	4383	18	66871,6	22	9020
city Kyiv	1690051	750	24818401,5	132	1077142

Source: formed according to the State Statistics Service [9].

Analysis of the main indicators of the hospitality industry in the regions of Ukraine in 2020 shows that the leader in all indicators is the city of Kiev. In addition, the largest number of tourists was registered in Ivano-Frankivsk (54,864 people) and Lviv (52,690 people) regions. The largest number of tour operators and travel agents (legal entities) operated in Dnipropetrovsk (109) and Lviv (97) regions. Naturally, these regions showed the highest indicators of the cost of tourist packages sold, 486502.9 thousand UAH in Lviv and 344970.6 thousand UAH in Dnipropetrovsk regions. The largest number of hotel farms in 2020 was typical for the resort regions — Odesa (147) and Zaporizhia (119) regions. It is worth noting that the number of hotel farms in all regions of Ukraine significantly decreased in 2020 compared to 2019.

Thus, studies of trends in the development of the hospitality industry prove the expediency of stimulating and supporting the activities of business entities in modern difficult conditions. It is worth noting that the governments of most countries quickly responded to the expediency of minimizing the consequences of the COVID-19 pandemic. Analysis of such measures has shown that two approaches are effective — providing affordable loans for businesses and delaying the payment of debt and tax obligations [3]. For example, the Polish government has introduced interest-free loans and tax holidays for these entities to support small and medium-sized businesses in the hospitality industry since 2019. The forms and procedures for submitting tax reports by business entities, paying most taxes have been simplified, and the procedure for tax deductions has been accelerated.

In addition, the results of the conducted research show that in Ukraine there is a growing demand for hospitality trends related to ensuring the safety of guests and have become relevant with the spread of the COVID-19 pandemic [10]. Contactless payments, home delivery of food and beverages, and virtual tours are becoming popular in the hospitality industry. Smart hotels that allow you to control heating or air conditioning from your smartphone or turn on appliances using voice commands to a smart speaker are gaining popularity. Smart technologies automatically adjust the light brightness, room temperature, and so on. Also, when traveling in the regions of Ukraine, modern tourists put local flavor and regional gastronomy in the first place, the development of which is a significant competitive advantage of most regions. Modern tourists traveling want to experience the real flavor of the region, its ethnic features and taste local cuisine. Most regions of Ukraine have these competitive advantages (picturesque landscapes, rich ethnic culture, gastronomic offers, attractive historical and cultural objects).

Also, we consider the activation of local self-government efforts to target the use of funds from the tourist fee on the ground, the use of tools for strategizing and programming the development of the regional hospitality industry, combining industry stakeholders into clusters, alliances, and so on to be promising areas for increasing the competitive advantages of the hospitality industry in modern conditions.

Conclusions. In the new economic conditions, the main condition for the successful functioning of business entities that provide services for tourists and visitors to the region is the ability to quickly adapt to new environmental conditions and reorient to new tourist markets. Modern factors that determine the conditions of functioning of business entities of the hospitality industry include: ensuring the safety of life and health of guests, optimizing the technological processes of manufacturing products and services of hospitality in the region, the use of digital technologies, strengthening the role of healthy food, expanding the range of products and services of tourist regions, rapid development of delivery services, orientation to environmental activities, strengthening the requirements for personnel qualifications, etc.

Analysis of the dynamics of the main indicators of the development of the hospitality industry shows negative trends. Thus, both in Ukraine and in the world, the number of business entities that provide services to tourists has decreased. The total contribution of tourism to GDP in 2019 was 6.3 %, and in 2020 it decreased to 3.4 %. A similar situation is observed with the impact of tourism on global GDP (in 2019 it was 10.4% (9.2 trillion) in 2020 it decreased to 5.5%). Analysis of the volume of capital investments in Ukraine by types of economic activity in the field of temporary accommodation and catering shows an increase in the share of financing for the development of the hospitality industry exclusively during periods of large-scale events. These indicators in 2020 show a rapid decline in them.

Thus, the promising directions of increasing the competitive advantages of the regional hospitality industry in modern conditions of development include: activation of financial incentives for the activities of subjects of the hospitality industry (especially small and medium-sized businesses in the region), targeted use of funds from tourist tax revenues and their direction to the development of the tourist infrastructure of the region, the use of tools for strategizing and programming the development of the regional hospitality industry, combining all industry stakeholders in clusters, alliances, etc.

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