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MONITORING OF THE HOTEL INDUSTRY STATE IN UKRAINE AND POLTAVA REGION

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Annotation. *The purpose of the article is to monitor the state of the hotel industry in Ukraine and Poltava region, and to identify opportunities for the restoration of the hotel industry after the pandemic of 2019–2020 to increase the capacity of hotel enterprises. Research methodology.* The realization of this goal is achieved through the use of general scientific research methods: analysis, synthesis, induction, and systems analysis. **Results.** The stages of the research are developed and their condition is assessed. The changes that took place in collective and similar accommodation facilities during 2011–2017 and 2018–2020 (before and during the pandemic) are studied. The efficiency of some hotel enterprises in Ukraine and the region is substantiated. It is determined that in contrast to the existing sectors of the economy, achieving the goal and gaining a competitive advantage in the field of hospitality is possible only if the risks are reduced and shortcomings are eliminated. The specifics of the development of hotel enterprises are largely related to the development of the regions. It is noted that Poltava region is one of the promising regions for tourism and hospitality.

Keywords: monitoring, hotel management, collective means of accommodation, similar means of accommodation, hotels, efficiency, potential of hotels.

The problem statement in general terms. In order to increase the efficiency of hotels potential, it is necessary to study the current state of the hotel industry and its development over a certain period of time as well as to identify opportunities for the recovery of the hotel business both in Ukraine and at the regional level, particularly in Poltava region, taking into account the crisis phenomena and the pandemic during 2019–2021.

The analysis of recent studies and publications. The basis for the study of the state of the industry in Ukraine and Poltava region was information sources (statistical yearbooks of Ukraine and Poltava region), the scientific work of A. S. Kaplina and surveys of the Ukrainian Association of Hotels and Resorts together with international experts of Horwath HTL.

The aim of the article. For improving the capacity of hotels and, in particular, their labor potential, it is advisable to study the current state of the hotel industry and its development over a period of time as well as to identify opportunities for the recovery of the hotel facilities both in Ukraine and at the regional level given the crisis phenomena and the pandemic during 2019–2021. These issues are the focus of the research.

The presentation of basic material. A prerequisite for monitoring the state of the Ukrainian hospitality industry is the development of the stages of the research process and the evaluation of their condition.

The author's development of a model of this process is proposed (Figure 1).

Ukraine's statistical annuals by year were used to monitor the condition of the hotel facilities in Ukraine. Those indicators that best characterize the hotel industry were selected: the number of collective places of accommodation (CPA), hotels and similar places of accommodation (SPA); the number of people staying in them. Studies of changes were conducted during the years 2011, 2015, 2016, and 2017. The base year was chosen as 2011 (Figures 2, 3).

As can be seen in Figure 2, the number of CPA, hotels, and SPA in Ukraine was decreasing during 2015 ... 2017 by 7,8% in 2015, 9,6% in 2016, and 12,6% in 2017 compared to 2011. For hotels and SPA, there was a decrease in 2015 and 2017, when the number of facilities decreased by 4.2% and 5.1% respectively. In 2016, the number of hotels and SPA increased by 7.0%. Such changes can be attributed to the influence of various factors: political, economic, external, and internal.

A slightly different picture was related to the number of persons staying in CPA and hotels and SPA (Figure 2). Between 2011 and 2015, there was a 4.5% decrease in the number of persons in CPA and a slight increase of 3% in hotels and SPA compared to 2011.

Between 2016 and 2017, the number of people staying in accommodation facilities increased. This trend was observed for both CPA, hotels, and SPA by 8.2% and 20.1%, respectively, compared to 2011. In

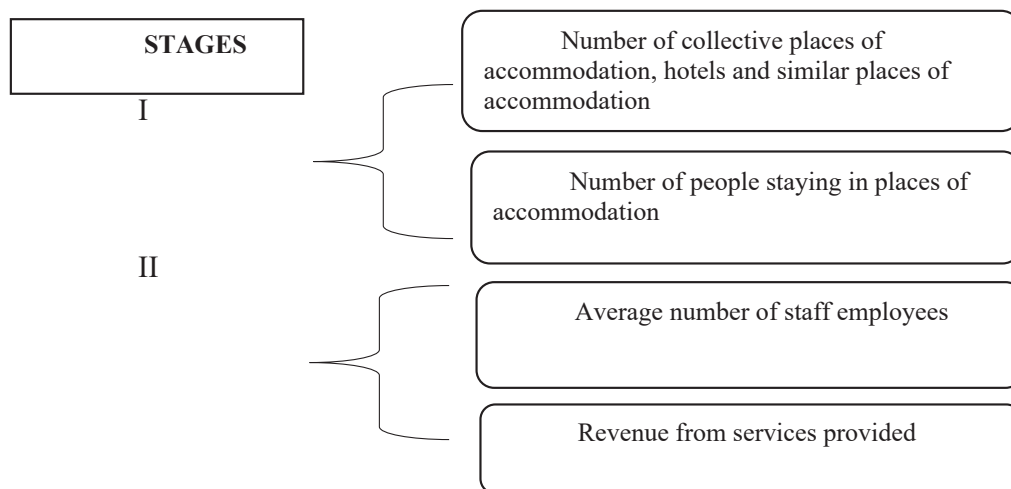


Figure 1. Model of the process of monitoring the Ukrainian hotel industry state

Source: developed by the authors

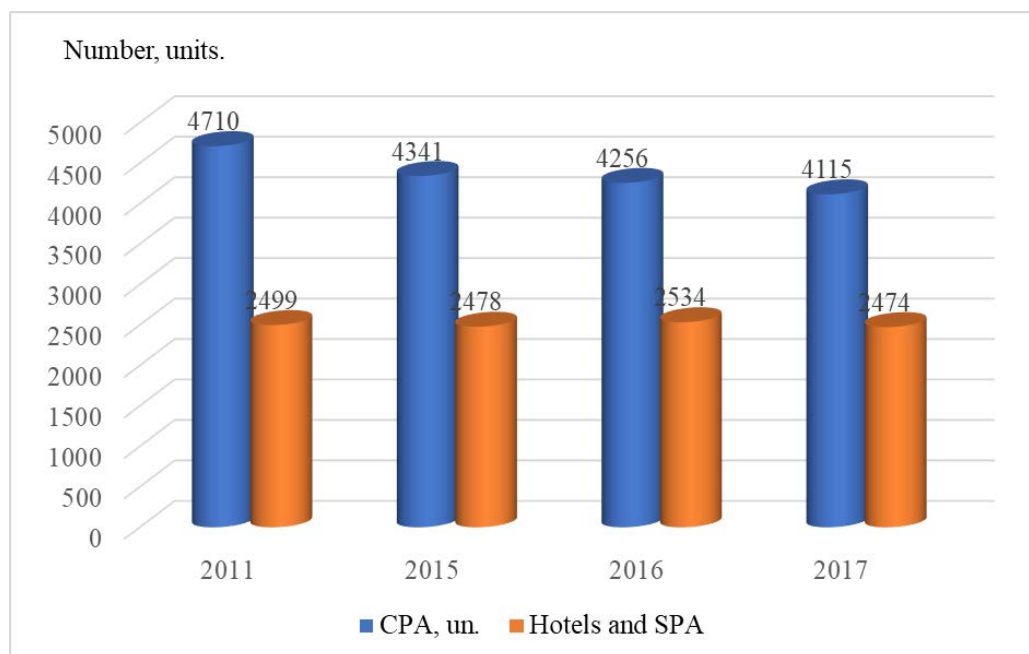


Figure 2. Changes in the number of collective places of accommodation in Ukraine in total and including hotels and similar places of accommodation by year (2011–2017)

Source: developed by the authors according to [1]

2017, the increase was 10.2% for CPA and 22.4% for hotels and SPA.

The average number of staff employees was studied to assess the labor potential of CPA and hotels and SPA (Figure 4).

The number of staff employees in the hotel industry decreased between 2015 and 2017. For CPA, the decreases were respectively 21.3%; 20.9%; 23.7% compared to 2011. The decrease in the average number of staff employees for hotels and SPA was 9.6%; within the error in 2016 and 8.4% in 2017.

Hospitality enterprises are business objects and their main purpose is to generate revenue from the

sale of services to consumers, so in the next stage of the study, we determined the changes in revenue (excluding VAT, excise tax) in CPA, hotels, and SPA between 2011 and 2017 (Figure 5).

The data presented in Figure 5 shows an increase in revenues for CPA, hotels, and SPA during the period under study. For CPA, the increase was within the error (0.5%) in 2015, 25.9% in 2016 and 58.1% in 2017 compared to 2011. Revenues for hotels and SPA increased by: 41.7% (2015), 85.9% (2016), 7.6% (2017).

For hotels and SPA, in 2015, 2016, and 2017, there was an increase of 1.4; 1.86; 2.39 times in revenue from

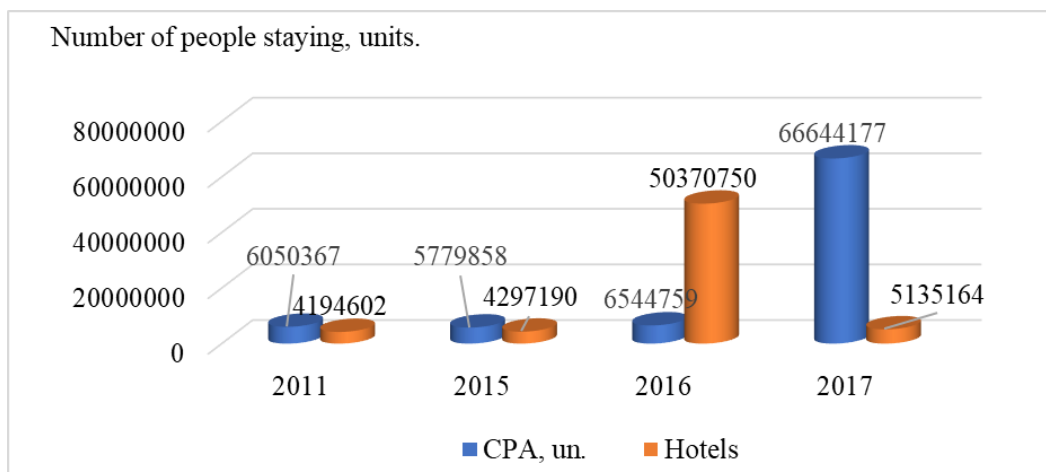


Figure 3. Changes in the total number of people staying in places of accommodation, including hotels and SPA (2011–2017)

Source: developed by the authors according to [1]

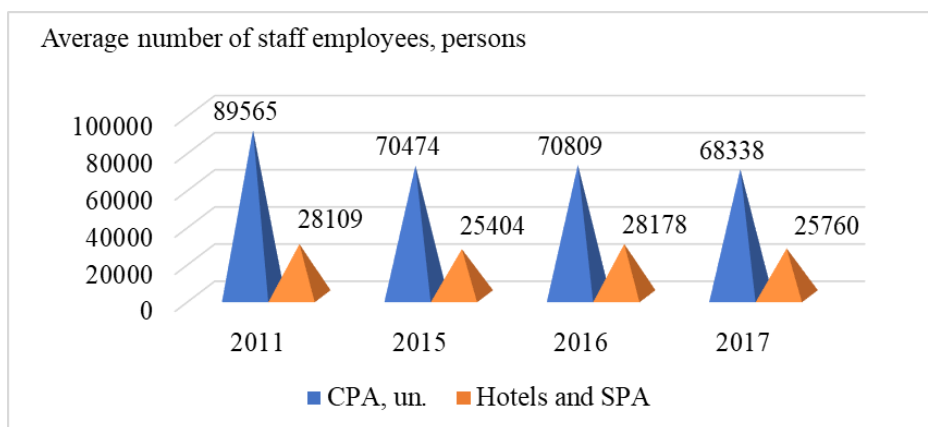


Figure 4. Changes in the average number of staff employees staying in collective places of accommodation, including hotels and similar places of accommodation during 2011–2017

Source: developed by the authors according to [1]

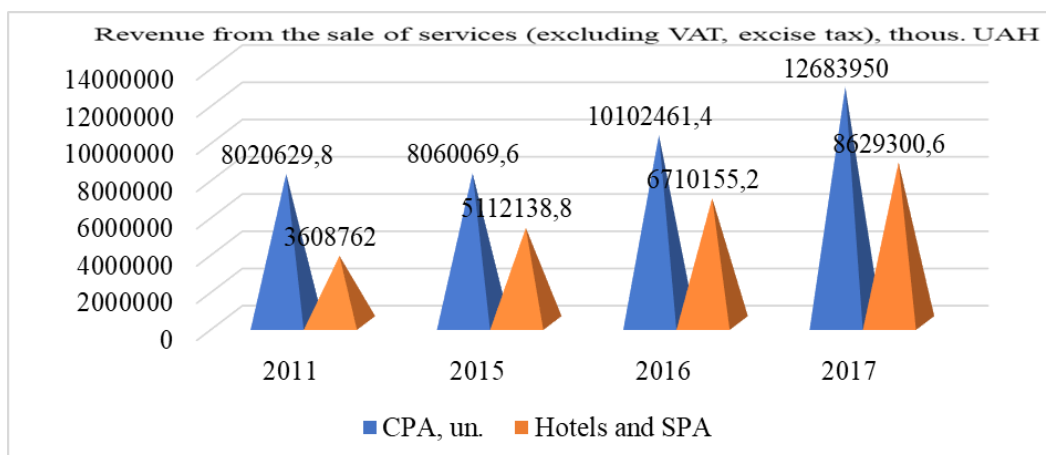


Figure 5. Changes in the amount of revenue received by collective places of accommodation (excluding VAT, excise taxes, etc.), including 1 – CPA, 2 – hotels and SPA during 2011–2017

Source: developed by the authors according to [1]

services provided as compared to 2011, indicating the performance of enterprises in terms of providing services.

Thus, in summarising the state of the hotel business from 2011 to 2017, some ups and downs in certain indicators should be mentioned. There was a declining number of CPA, hotels, and similar places of accommodation. For those in places of accommodation, by 2017 their number was increasing and peaked in 2017. A decrease in the average number of staff employees was observed for both CPA, hotels, and SPA. But despite this overall picture of a declining number of CPA, their revenues for services provided by hospitality businesses showed an upward trend.

We have analyzed the next period of operation of the hotel industry (2018–2020), accompanied by the global crisis and pandemics. In such an uncertain environment (changing economic and regulatory circumstances), hotel entrepreneurs daily faced the reality of the declining hotel industry. Therefore, to clarify the situation, the Ukrainian Hotel and Resort Association (UHRA) together with international experts of Horwath HTL conducted a survey to assess the state of the hotel industry and address the pressing issues that are risks for hotels. According to the survey [2], 122 hotels with a room inventory of about 72 rooms participated.

An important issue was the comparison of revenues of facilities at the end of 2020 compared to 2019: 93% confirmed an overall decline in revenues; 21% saw a decline of between 20...40%; a third – between 40...60%; 30% – over 60%; 4% saw an increase in annual revenues; 3% reported on the balance of revenues as the same. As the experts pointed out, 3% was represented by out-of-town hotels where there was an increase in revenue. The actions taken by the facilities are given in Table 1.

The actions listed in Table 1 may not always be effective, in our opinion, because in this case, they may be selective. The next important point was the change in the number of staff compared to 2019 (Table 2).

As can be seen from Table 2, some hotels can be characterized by increased demand and comfortable working conditions, while most others had to lay off or let their employees go. Also, an important issue was the reaction of banks to crediting Ukrainian hotels (Table 3).

Only 10% of respondents pointed out the flexibility of banks in the way of granting credit.

Consequently, the hotel industry in Ukraine is characterized by a lack of clearly defined highly competitive positions. This can be explained by the

Table 1

Actions taken by hotels to deal with the impact of the pandemics

Name of action	Number of interviewees in % and parts
Personnel reduction (cost-cutting)	66
Price reduction for services *	1/3
Product and service improvements	63
Introduction of digital and marketing tools	1/3
Alternative services (co-working spaces, room rentals for offices, etc.)	27
Conversion (lease for a gambling house)	7

Note: * is an instinctive but not always effective step;

** – legislative initiatives to legalize and regulate casino and gambling activities in Ukraine.

Source: developed according to [2]

Table 2

Changes in the number of staff in the hotel business in 2020 compared to 2019

Name of action	Number of interviewees in % and parts
Hiring additional staff due to demand	33
Maintaining staff at the same level	30
Dismissal of employees	75
– ¼ hotels	10–20
– 33%	20–40
– 15 %	40

Source: based on [2]

Table 3

Responses of Ukrainian banks to crediting hotels

Responses	Number of interviewees in %
The hotel has no credit	75
The bank showed flexibility	10
Negotiations with the bank continue	9
The bank did not agree	6

Source: based on [2]

following problems: the imperfection of the legal and regulatory framework for hotel enterprises in Ukraine; the lack of a clear legislative definition of the hotel industry in the tourism sector; the lack of regulation of land ownership, especially for foreign investors; the mismatch between the infrastructure of hotel enterprises and the requirements of consumers; the insufficient level of service quality in high-category hotels, as noted in [3], quarantine measures related to the pandemics.

It is known that existing disadvantages can only be eliminated by taking into account the specific nature of the hotel industry. Therefore, unlike the existing sectors of the economy, it is possible to achieve the goal and gain a competitive advantage in the hotel industry by reducing risks and eliminating disadvantages.

Along with the analysis and assessment of the hotel industry state in Ukraine, we have studied the development of hotel enterprises using the example of a separate region – Poltava region. In analytical scientific papers, different methods of formation and justification of the statistical samplings are presented. The use of each of them depends on the purpose, objectives of the analysis, and the specifics of the object. Poltava region, as the object of our research, is located in the steppe zone of Ukraine and is part of the North-Eastern region, which also covers Kharkiv and Sumy regions.

The territory of Poltava region is 28,8 thousand km² and the population as of October 1, 2021 is 1 359,1 thousand [4; 5]. Poltava region is characterized by sufficient natural reserves of oil, iron ore, chalk, gypsum, and limestone. Agriculture is well developed, specializing in crop growing and livestock farming.

Since the object of the study is collective places of accommodation, hotels, and similar places of accommodation facilities, we will therefore analyze their changes between 2011 and 2017 (Figure 6).

As noted above, we analyze CPA compared to 2011 and Kharkiv and Sumy regions, which are part of the North-Eastern region. Figure 6 shows that Poltava region ranks second after Kharkiv region in the North-Eastern region in terms of CPA, while Sumy region ranks third. In 2011, Poltava region had 36.1% fewer places of accommodation than Kharkiv region and 42.9% fewer places of accommodation than Sumy region.

Starting from 2012 and up to 2013, there was an increase in CPA for Poltava and Kharkiv regions (Poltava – by 5.5% and 22.2% more compared to 2011), (Kharkiv – by 12.2% in 2012 and 2013)). Sumy region was characterized by a decrease of CPA between 2011 and 2017 by 4.2; 5.6; 16.7; 23.6; 20.8; 27.8%, respectively). For Poltava region, between 2014 and 2015 the number of CPA was higher compared to 2011 by 13.5 and 10.3%, while in 2016 and 2017 there was a decrease of 13.5 and 15.1%, respectively.

For Kharkiv region, the increase in CPA continued until 2014, and onwards 2015 there was a decrease in CPA.

The picture for hotels and SPA was somewhat different from CPA (Figure 7).

For Poltava region, between 2012 and 2015 the number of hotels and SPA increased by 9,3;33,7;23,3;22,1% respectively, and in 2016 and 2017 their number decreased by 11,6 and 10,5% respectively compared to 2011. Kharkiv region between 2012 and 2017 showed stable growth of hotels and SPA by 21,4;12,2;21,4;19,4;4,9% and 12,6% respectively. Sumy region was characterized between 2012 and 2017 by a decrease in the number of hotels and SPA from 2,1 to 27,1%, and in 2013 by an increase of 4,2%.

It is known that the main socio-economic indicators for cities and regions are as follows: population size (PS), the average number of staff employees

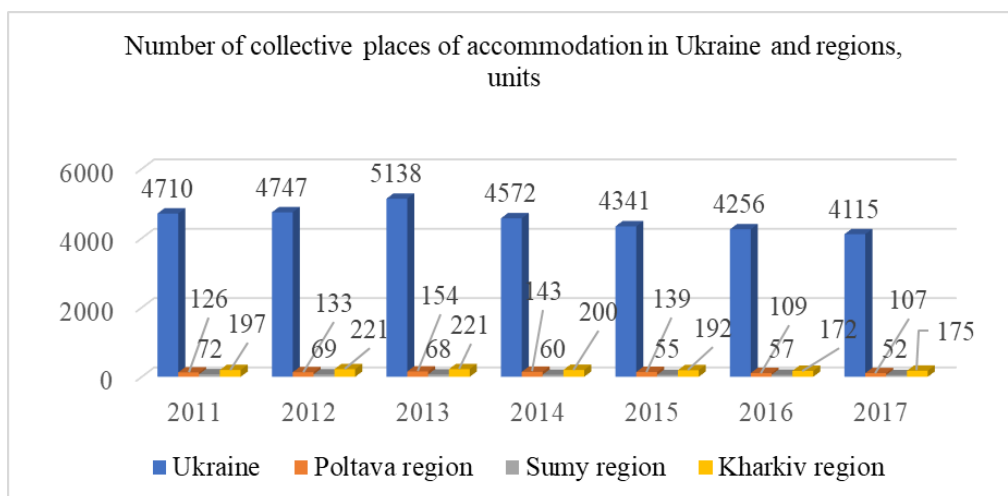


Figure 6. Changes in the number of collective places of accommodation in the regions between 2011 and 2017

Source: developed by the authors according to [1]

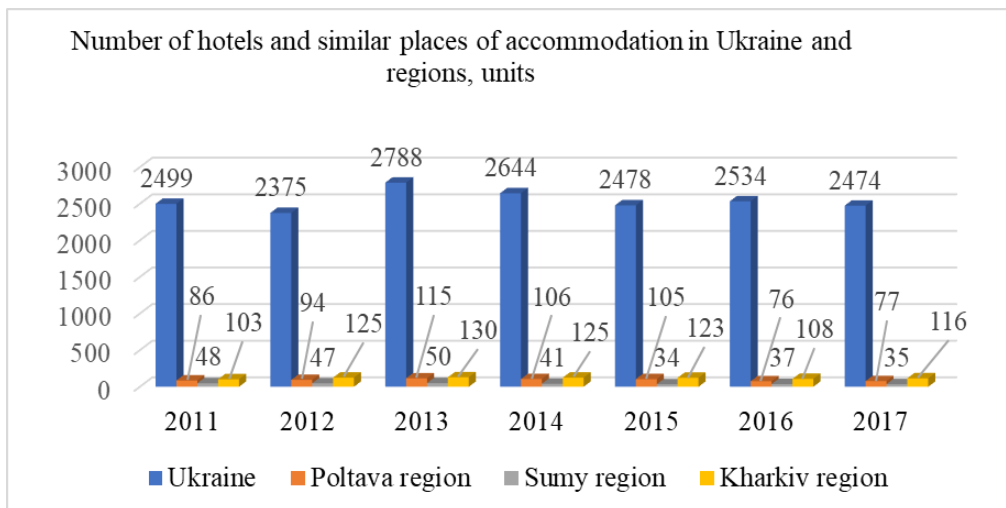


Figure 7. Changes in the number of hotels and similar places of accommodation by regions between 2011 and 2017

Source: developed by the author according to [1]

(ANSE), and the average monthly nominal salary of staff employees (AMNSSE). They are calculated as indices of the indicators as a percentage of the previous year (Figure 8).

The analysis of the data shows that the population size remained constant between 2010 and 2020. The same trend was observed for the average number of employees in Poltava; changes were within the error. The average monthly nominal salary of staff employees tended to increase in 2015, 2017, 2018, 2019 by 4.0; 24.3; 12.9; 3.1%, while in 2020 it decreased within the error by 3.4%.

Labor market indicators that characterize the labor market include the average number of staff workers in thousands of persons (ANSW); the hiring rate

(HR) as a percentage of the average number of staff workers; the dismissal rate (DR) as a percentage of the average number of staff workers; and the average monthly nominal salary of staff workers in hryvnias (AMNSSW) (Figure 9).

Between 2010 and 2020 there was a decrease in the average number of staff employees rate in Poltava region (2013 – 5.5%, 2016 – 16.1%, and in 2020 – 21.4%). The hiring rate increased by 5% in 2013, 8.6% in 2017, 4% in 2019, and 3.2% in 2020. The employee dismissal rate increased by 9.7% in 2015, 6.2% in 2017, and 6.6% in 2019. Between 2013 and 2020, there was an increase in AMNSSW by 1.4 times (2013), 1.5 times (2014), 4 times (2018), 4.7 times (2019), and 5.1 times (2020), respectively.

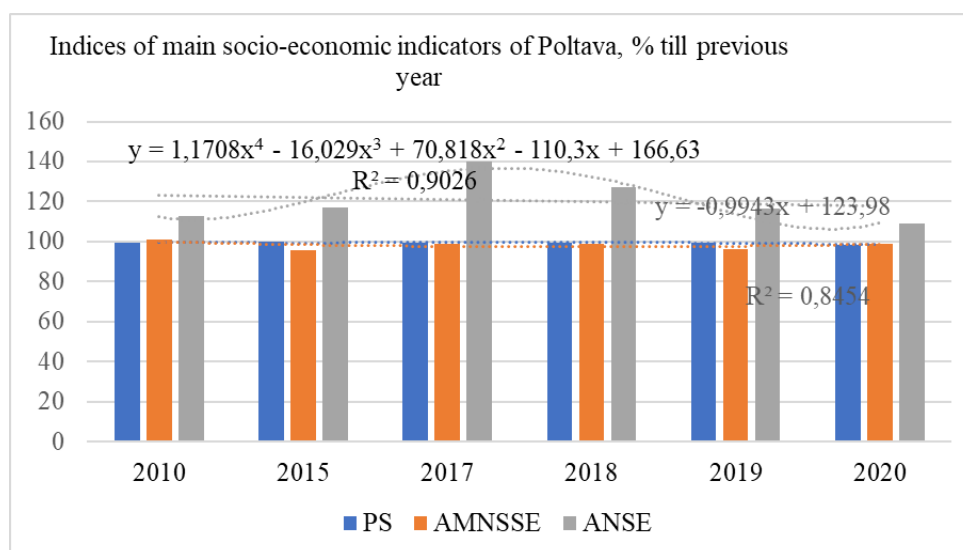


Figure 8. Changes in the indices of the main socio-economic indicators of Poltava between 2010 and 2020

Source: developed by the authors according to [1]

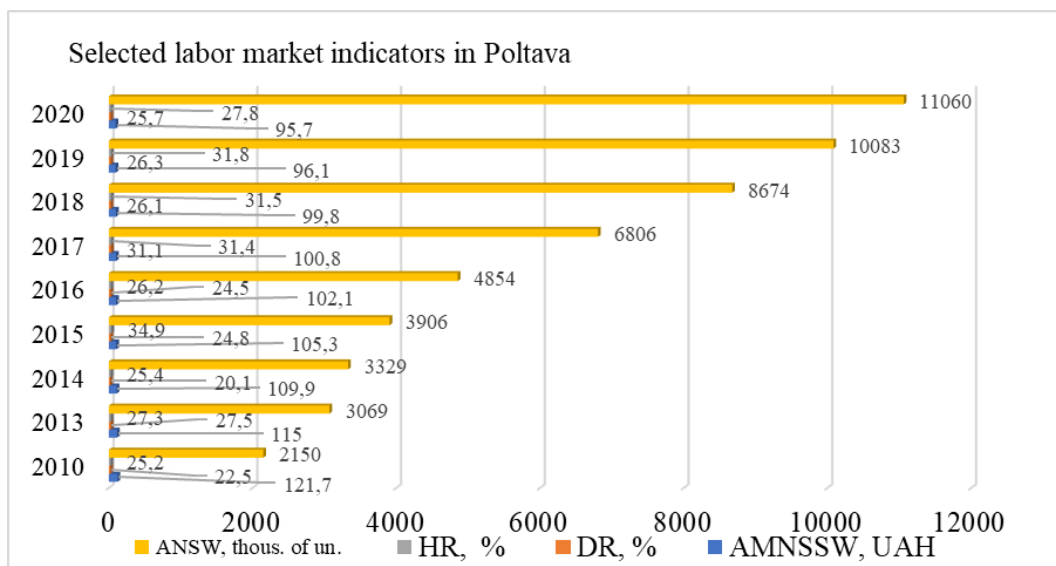


Figure 9. Changes in labor market indicators in Poltava and Poltava region during 2010–2020
Source: developed by the authors [1]

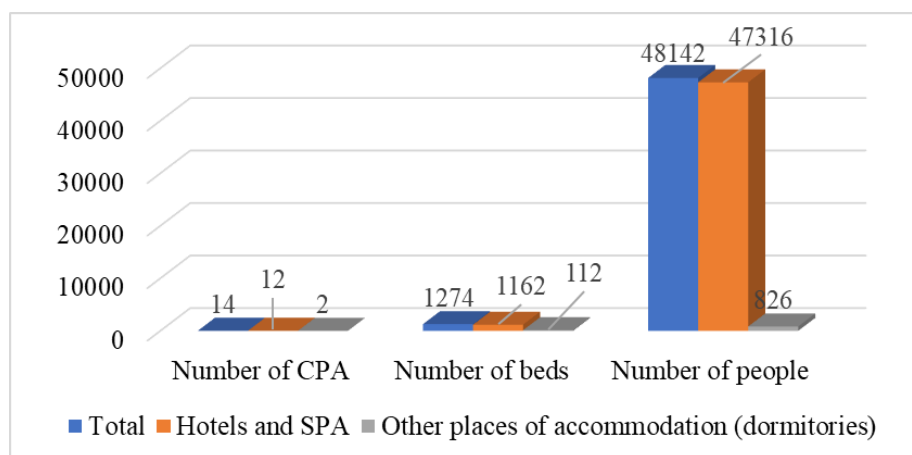


Figure 10. Number of CPA in total; hotels and similar places of accommodation; the number of occupants; other places of accommodation in Poltava in 2020
Source: developed by the authors according to [1]

One of the important indicators describing the state of the hotel industry in the regional center of Poltava is the total number of enterprises, the number of beds, and the number of persons staying in them (Figure 10).

The data given shows that in 2020 the total number of CPA was 14 enterprises, of which: there were 12 hotels and similar places of accommodation, others – 2. The total number of beds in CPA was 1,274, of which: hotels and SPA had 1,162 beds and the rest had 112 beds. The number of people staying during the year 2020 in CPA was 48142 and in hotels and SPA was 47316 and the others were 126. In the next stage, the average monthly salary of the employees of temporary accommodation and catering facilities was studied (Figure 11).

The average monthly salary of staff employees of temporary accommodation facilities was rising stead-

ily in Poltava region since 2010 by 1.79; 2.1; 3.3; 3.9; 5.8 times in 2015, 2016, 2017, 2018, and 2019, respectively.

Along with the general trend of changes in the average number of staff employees in Poltava region, we have studied their changes in temporary accommodation and catering facilities, as well as employment of the population of the region in places of accommodation (Figure 12 and Figure 13).

Between 2015 and 2019, the average number of staff employees in temporary accommodation facilities decreased by 2.2 times in 2015 and from 2016 to 2019 by 1.48; 1.21; 1.52; 1.20 respectively.

Employment tended to decrease by 4.6% in 2015 compared to 2010 and to increase by 5.4% in 2019.

For temporary accommodation facilities, important indicators are the rate of hiring and dismissal of

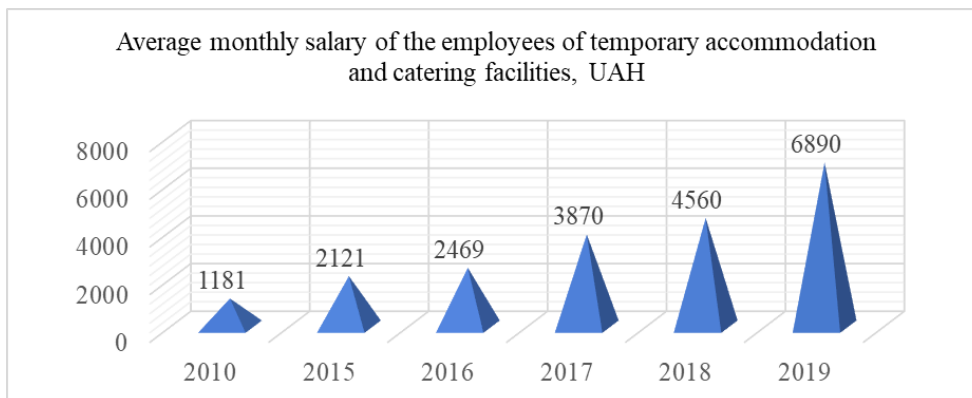


Figure 11. Changes in the average monthly salary of staff employees of temporary accommodation and catering facilities in Poltava region during 2010–2019

Source: developed by the authors according to [1]

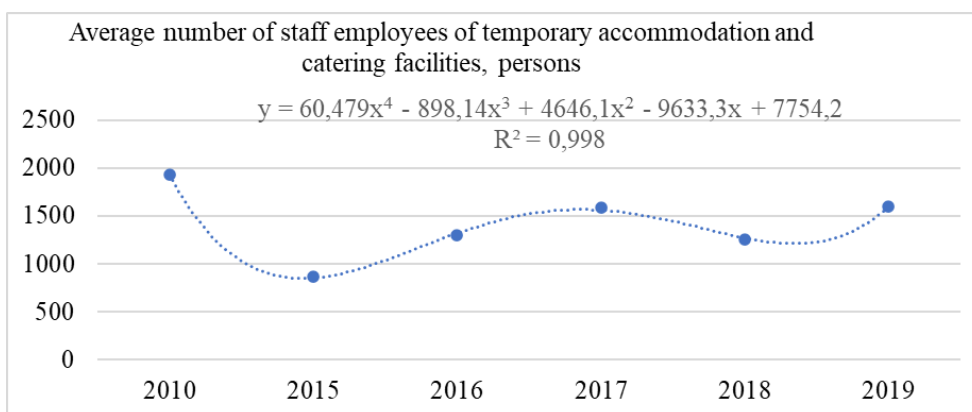


Figure 12. Changes in the average number of staff employees of temporary accommodation and catering facilities in Poltava region during 2010–2019

Source: developed by the authors according to [1]

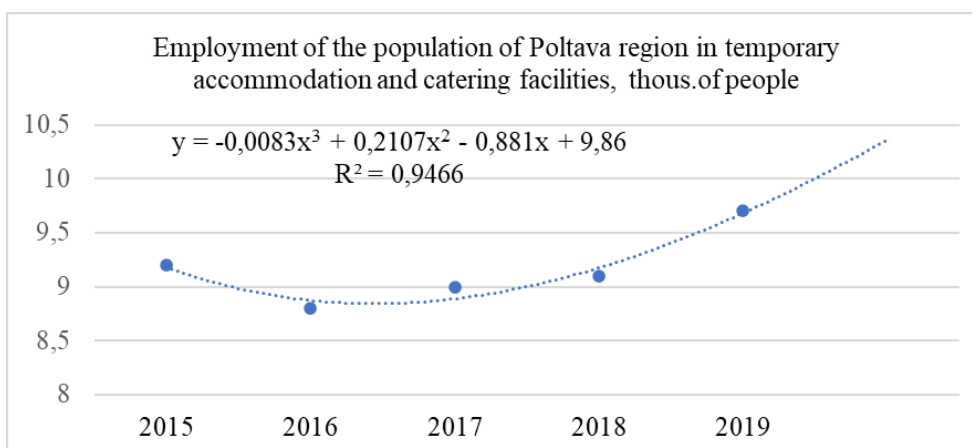


Figure 13. Changes in the employment of the population of Poltava region in temporary accommodation and catering facilities during 2015–2019

Source: developed by the authors according to [4; 5]

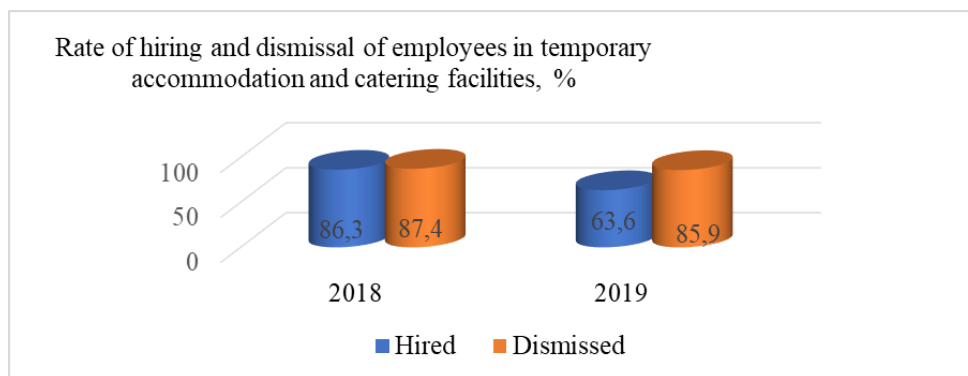


Figure 14. Changes in the rate of hiring and dismissal of employees in temporary accommodation and catering facilities in Poltava region during 2018–2019

Source: developed by the authors according to [1]

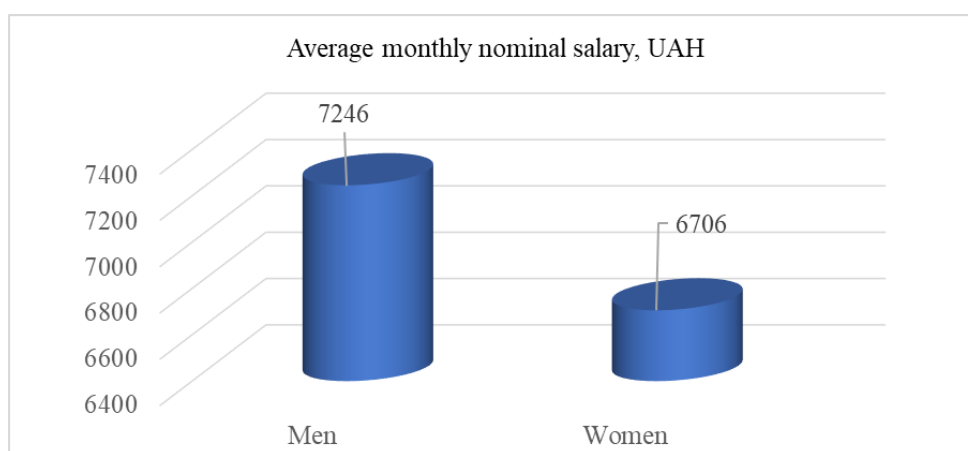


Figure 15. Average monthly nominal salary of staff employees in TAF of Poltava region in 2020

Source: developed by the authors according to [1]

employees and the average monthly nominal salary of staff- employees (Figure 14 and Figure 15).

The figures show a 22.7 percent decrease in the hiring rate of the temporary accommodation facilities (TAF) in 2019 and a corresponding 1.5 percent decrease in employee dismissal (within the error).

In 2020 a difference between the average monthly salary of men and women was observed. It was lower for women by 540 UAH.

The data presented shows that there are certain positive and negative shifts in the economy of the region, which cannot but affect the development of the hotel industry.

Positive changes in Poltava region include an increase in employment in TAF, a reduction in the rate of dismissal, and an increase in the average

monthly salary in TAF and catering facilities. Negative changes in TAF are as follows: a decrease in hiring rates in 2019, disproportionate nominal salary for men and women, and a decrease in the number of hotels and SPA.

Conclusions. Summarizing the monitoring of the development of the hotel industry in Ukraine, we pointed out the prospects and shortcomings and identified reserves for improving the efficiency of functioning and competitiveness of the industry. The specifics in the development of these enterprises, which is largely related to the development of the regions, should be emphasized as well. As noted, Poltava region is one of the promising regions, so the next task of our study will be to assess the development of the labor potential of hotel enterprises in Poltava region.

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Анотація. Мета статті полягає у моніторингу стану готельної галузі України і Полтавського регіону, виявлення можливостей відновлення готельного господарства після пандемії 2019–2020 рр. для забезпечення підвищення потенціалу готельних підприємств. **Методика дослідження.** Реалізація поставленої мети досягається завдяки застосуванню загальнонаукових методів дослідження: аналізу, синтезу, індукції, системного аналізу. **Результати.** Розроблено етапи дослідження та проведена оцінка їх стану. Проаналізовано зміни, що відбувалися у колективних та аналогічних засобах розміщення протягом 2011–2017 рр. і 2018–2020 рр. (до та під час пандемії). Обґрунтовано ефективність роботи окремих готельних підприємств в Україні і регіоні. Досліджено середньооблікову кількість штатних працівників колективних засобів розміщення готелів й аналогічних засобів розміщення, що мала тенденцію в Україні до зменшення протягом 2011–2017 років. Встановлено збільшення доходів від наданих послуг підприємствами протягом досліджуваного періоду. Проведено оцінку показників ринку праці в готельному господарстві Полтавського регіону протягом 2010–2020 років: зменшення середньооблікової кількості штатних працівників; підвищення рівня приймання на роботу і збільшення рівня звільнення працівників. Визначено, що у 2020 році в готельній галузі регіону жінки отримували середньомісячну зарплату на 540 гривень менше від чоловіків. Визначено, що на відміну від існуючих галузей економіки, досягти мети й отримати конкурентні переваги у сфері гостинності можливо лише за умови зниження ризиків і усунення недоліків. Специфіка розвитку готельних підприємств значною мірою пов'язана з розвитком регіонів. Відзначено, що саме Полтавська область належить до перспективних регіонів розвитку туризму і готельного господарства.

Ключові слова: моніторинг, готельне господарство, колективні засоби розміщення, аналогічні засоби розміщення, готелі, ефективність, потенціал готелів.