ЕКОНОМІЧНІ ПРОБЛЕМИ РОЗВИТКУ ГАЛУЗЕЙ ТА ВИДІВ ЕКОНОМІЧНОЇ ДІЯЛЬНОСТІ

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Current state of Ukraine's hotel market under covid–19 and prospects for its development

The subject of the study *is the current state of the hotel market in Ukraine under the conditions of COVID–19 and its development prospects.*

The aim of the study *is to study the current state of the hotel market in Ukraine under the conditions of COVID–19 and the prospects for its further development in modern market conditions.*

Research Methods. *When writing the article, general scientific and special methods were used to study the economic phenomena and processes of the hotel market in Ukraine.*

Results of the investigation. *During the writing of the article, it was found that for 2018–2019. Kiev pursued an active policy of increasing visitors, which has the following results: so according to the results of the first half of the year 2019r. the city has already been visited by 20 thousand people more than 2018 of the same period. And such a positive upward trend in the number of guests would continue if not for COVID–19. This is a positive trend in 2018–2019. could not have a positive impact on the hotel market of the capital. So far, the number of rooms in Kiev is much inferior to most European capitals and still leaves upside potential. It is also determined that the losses of the hotel sector of Ukraine during the COVID–19 quarantine period amount to millions of UAH. The highest numbers record 5–star objects. Their losses amount to 3–8 million UAH, and the largest losses are for hotels that worked for business travel, as well as for hotels located in small cities and regional centers outside of business traffic flows. The main consequences of the coronavirus for the hotel business in Ukraine, in addition to the absence of guests, the closure and drop in income, also include the cash gap. Revenues quickly became zero. This led to the need for many companies to release almost all employees on leave at their own expense until the end of quarantine, stop advertising campaigns and other expenses. It also established a number of necessary priority measures to save and mitigate the economic blow from the coronavirus, which the hotel industry needs: to prohibit the accrual of fines, penalties and other financial sanctions for the period of quarantine and for 12 months after; prohibit charging interest and other payments for the use of credit funds; oblige banks and financial institutions to defer payment of funds; reduce VAT for hospitality enterprises up to 10%. It was determined that in 2020–2022 there will be a moderate increase in the total supply in the hotel market, which is associated with the restoration of construction or reconstruction of hotel projects that either remained frozen for more than 5 years or were characterized by a slow pace of construction.*

Scope of the results. *Design of hotel and restaurant facilities, hotel business, tourism, economics, management, enterprise management, strategic management.*

Conclusions. *According to the results of 2018–2019 Kiev pursued an active policy of increasing visitors, which has the following results: so according to the results of the first half of the year 2019 the city has already been visited by 20 thousand people more than 2018 of the same period. And such a positive upward trend in the number of guests would continue if not for COVID–19. This is a positive trend in 2018–2019 could not have a positive impact on the hotel market of the capital. So far, the number of rooms in Kiev is much inferior to most European capitals and still leaves upside potential. By 2018–2019 Quite a lot of tourists and guests came to Ukraine. This was facilitated by low–cost flights, and the opening of borders with the European Union, and the growth of brand awareness of the country in the international arena, this, in turn, encourages increased development of tourist attractiveness. We are talking about investments, and about promotional campaigns, and about attracting international capital. Do not forget about the support of the hotel business. Developers need preferences and guarantees in order to see the economic feasibility and viability of the project.*

Keywords: *tourism, hotel business, COVID–19, hotel and restaurant business, development, hostel, low–cost, rack rates.*

ПУЗИРЬОВА П.В.
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Сучасний стан готельного ринку України в умовах COVID–19 та перспективи його розвитку

Предметом дослідження *є сучасний стан готельного ринку України в умовах COVID–19 та перспективи його розвитку.*

Метою дослідження *є дослідження сучасного стану готельного ринку України в умовах COVID–19 та перспективи його подальшого розвитку в сучасних ринкових умовах.*

Методи дослідження. *При написанні статті використано загальнонаукові та спеціальні методи дослідження економічних явищ і процесів щодо готельного ринку України.*

Результати роботи. *В результаті написання статті було встановлено, що за 2018–2019 рр. Київ проводив активну політику з нарощування відвідувачів, що має результати: так за результатами першого півріччя 2019р. місто вже відвідало на 20 тис. людей більше, ніж 2018 р. аналогічного періоду. І така позитивна тенденція зростання кількості гостей продовжувалась би, якщо б не COVID–19. Така позитивна тенденція 2018–2019 рр. не могла не мати позитивного впливу на готельний ринок столиці. Поки що номерний фонд Києва сильно поступається більшості європейських столиць та все одно залишає потенціал до зростання. Також визначено, що втрати готельного сектора України у період карантину COVID–19 складають мільйони гривень. Найвищі цифри фіксують 5–зіркові об'єкти. Їхні збитки складають 3–8 млн. грн., а найбільші збитки у готелів, які працювали на бізнес–тревел, а також у готелів, розташованих у невеликих містах і обласних центрах поза потоками бізнес–трафіку. До головних наслідків коронавірусу для готельного бізнесу в Україні, крім відсутності гостей, закриття та падіння доходів також належить касовий розрив. Доходи стрімко стали нульовими. Це призвело до необхідності багатьом компаніям відпустити майже всіх співробітників у відпустку за свій рахунок до закінчення карантину, зупинити рекламні кампанії та інші витрати. Також встановлено ряд необхідних першочергових заходів для порятунку та пом'якшення економічного удару від коронавірусу, яких потребує готельна галузь: заборонити нарахування штрафів, пені та інших фінансових санкцій на період карантину та впродовж 12 місяців після;заборонити нараховувати відсотки та інші платежі за користування кредитними коштами; зобов'язати банки та фінансові установи надавати відстрочку сплати коштів; знизити ПДВ для підприємств готельної галузі до 10%. Визначено, що в 2020–2022 роках на готельному ринку буде помірне збільшення загального обсягу пропозиції, яке пов'язане з відновленням будівництва чи реконструкції готельних проєктів, які або залишалися замороженими протягом понад 5 років, або характеризувалися повільними темпами будівництва.*

Галузь застосування результатів. *Проектування об'єктів готельно–ресторанного господарства, готельна справа, туризм, економіка, менеджмент, управління підприємством, стратегічне управління.*

Висновки. *За результатами 2018–2019 рр.. до України приїжджало досить багато туристів і гостей. Цьому сприяли і лоукости, і відкриття кордонів з Євросоюзом, і зростання впізнаваності бренду країни на міжнародній арені, це у свою чергу спонукає до збільшеного розвитку туристичної привабливості. Мова йде і про інвестиції, і про промокампанії, і про залучення міжнародного капіталу. Не варто забувати і про підтримку готельного бізнесу. Девелоперам потрібні преференції та гарантії, аби бачити економічну доцільність і життєздатність проєкту.*

Ключові слова: *туризм, готельний бізнес, COVID–19, готельно–ресторанний бізнес, девелопмент, хостел, лоукост, rack rates.*

ПУЗЫРЁВА П.В.
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Современное состояние гостиничного рынка Украины в условиях COVID–19 и перспективы его развития

Предметом исследования *является современное состояние гостиничного рынка Украины в условиях COVID–19 и перспективы его развития.*

Целью исследования *является исследование современного состояния гостиничного рынка Украины в условиях COVID–19 и перспективы его дальнейшего развития в современных рыночных условиях.*

Методы исследования. *При написании статьи использованы общенаучные и специальные методы исследования экономических явлений и процессов гостиничного рынка Украины.*

Результаты работы. *В ходе написания статьи было установлено, что за 2018–2019 гг. Киев проводил активную политику по наращиванию посетителей, что имеет такие результаты: так по результатам первого полугодия 2019р. город уже посетило на 20 тыс. человек больше, чем 2018 аналогичного периода. И такая положительная тенденция роста количества гостей продолжалась бы, если бы не COVID–19. Такая положительная тенденция 2018–2019 гг. не могла не иметь положительного влияния на гостиничный рынок столицы. Пока номерной фонд Киева сильно уступает большинству европейских столиц и все равно оставляет потенциал роста. Также определено, что потери гостиничного сектора Украины в период карантина COVID–19 составляют миллионы гривен. Самые высокие цифры фиксируют 5–звездные обьекты. Их убытки составляют 3–8 млн. грн., а наибольшие убытки у отелей, которые работали на бизнес – тревел, а также у отелей, расположенных в небольших городах и областных центрах вне потоков бизнес – трафика. К главным последствиям коронавируса для гостиничного бизнеса в Украине, кроме отсутствия гостей, закрытия и падения доходов также относят кассовый разрыв. Доходы стремительно стали нулевыми. Это привело к необходимости многим компаниям отпустить почти всех сотрудников в отпуск за свой счет до окончания карантина, остановить рекламные кампании и другие расходы. Также установлен ряд необходимых первоочередных мер для спасения и смягчения экономического удара от коронавируса, в которых нуждается гостиничная отрасль: запретить начисление штрафов, пени и иных финансовых санкций на период карантина и в течение 12 месяцев после; запретить начислять проценты и другие платежи за пользование кредитными средствами; обязать банки и финансовые учреждения предоставлять отсрочку уплаты средств; снизить НДС для предприятий гостиничной отрасли до 10%. Определено, что в 2020–2022 годах на гостиничном рынке будет умеренное увеличение общего объема предложения, которое связано с восстановлением строительства или реконструкции гостиничных проектов, которые либо оставались замороженными в течение более 5 лет, или характеризовались медленными темпами строительства.*

Область применения результатов. *Проектирование объектов гостинично – ресторанного хозяйства, гостиничное дело, туризм, экономика, менеджмент, управление предприятием, стратегическое управление.*

Выводы. *По результатам 2018–2019 гг. в Украину приезжало довольно много туристов и гостей. Этому способствовали и лоукосты, и открытие границ с Евросоюзом, и рост узнаваемости бренда страны на международной арене, это в свою очередь побуждает к увеличенному развития туристической привлекательности. Речь идет и об инвестициях, и о промокампаниях, и о привлечении международного капитала. Не стоит забывать и о поддержке гостиничного бизнеса. Девелоперам нужны преференции и гарантии, чтобы видеть экономическую целесообразность и жизнеспособность проекта. Ключевые слова: туризм, гостиничный бизнес, COVID–19, гостинично–ресторанный бизнес, девелопмент, хостел, лоукост, rack rates.*

Formulation of the problem. Tourism is an amazing sector of the economy with a huge multiplier effect. Tourism encourages the development of not only the hotel market, retail and services, but also the economy of Ukraine as a whole. The development of the hotel and restaurant business in Ukraine is one of the promising areas of the national economy. World experience shows that the hotel and restaurant business is developing quite rapidly under normal economic conditions. An effective tourism segment is the future of the country's investment climate. With the creation of favorable conditions for trade and the development of tourism business in Ukraine, the influx of international investment will increase significantly [16, 17]. Therefore, the first steps should be precisely the rejection of the tourist tax, which was extended last year, in addition, it is calculated based not on the cost of the room, but on the minimum wage – that is, it is constantly increasing. This has already led to higher prices for accommodation in hotels of the economy segment and subsequently may adversely affect the tourist and investment attractiveness of Ukraine. In addition, in Ukraine the VAT rate for services related to temporary accommodation of tourists is still not reduced. The rate cut, following the example of European countries, will help attract investment, create new jobs, and improve the country's business climate. Stimulates the development of tourism and visa liberalization policy – the abolition of entry visas. Also, diversification of tourism can become a necessary element of the flow of tourists to the country – it can be green, gastronomic, medical, extreme, entertaining, sports, etc. One cannot ignore the situation with COVID–19, which negatively affected the whole world and the Ukrainian hotel market. Closed borders of states, the cancellation of flights, restrictions on movement within Ukraine between regions and the absolute isolation of countries from each other provoked a large number of problems in the hotel sector. Among the positive global trends in the hotel business segment are the following: the growing role of the Internet in shaping consumer preferences and behavior; opening coworking in hotels; the growing popularity of business trips combined with leisure, in particular among millennials (Bleisure Travel by Millennials).

Analysis of recent research and publications. Actual questions and problems of the functioning state of tourism and the hotel and restaurant business have been studied by many scientists – economists, including: A. V. Borisova [1], N. A. Vlasova [2], G. A. Gorin [3], V. V. Izhevsky [4], V. S. Koveshnikov [5], D. A. Kornev [6], V. A. Kosenko [7], G. Ya. Krul [8], Y. Litvinchuk, A. Klyatskaya and V. Terzov [9], M. P. Malskaya [10], I. M. Melnik [11], S. G. Nezdojminov [12], S. I. Baylik and I. M. Pisarevsky [13, 14], P. A. Podlepina [15], V. F. Semenov [18], T. G. Sokol [19], A. N. Shapovalov [20], etc. However, the relevance of these issues and their insufficient visibility determine further consideration of this topic.

The main research material. In 2019, the hotel market of Ukraine was replenished with two new traditional hotels with a total of 110 rooms. At the same time, the development of hybrid hotels and concept hostels is gaining weight. In Kiev, in 2019, opened several original facilities, as well as the world's first hostel in the former subway cars on the Podil. After the reconstruction, the boutique hotel Riviera House (65 rooms) and the second building Amarant Hotel 3 * (45 rooms) were put into operation. According to the forecast of the United Nations World Tourism Organization (UNWTO) in 2020, the number of tourists will decrease by almost a third, compared to 2019. However, these were forecasts even before COVID–19, now almost 50,000,000 jobs related to the tourism industry are threatened with reduction. After the introduction of quarantine related to COVID–19, 35–40% of hotels in Ukraine have closed, others operate in a very limited mode. Therefore, the main problem remains the reduction or complete lack of profit. Those who work for some reason have lost 60–90% of their income [10, 21–23].

According to the results of 2018–2019 Kiev pursued an active policy of increasing visitors, which has results: so according to the results of the first half of 2019 the city has already been visited by 20 thousand people more than 2018 of the same period. And such a positive trend of increasing the number of guests would have continued, if not for COVID–19. Such a positive trend in 2018–2019 could not but have a positive impact on the hotel market of the capital. So far, the number of rooms in Kiev is much inferior to most European capitals and still leaves the potential for growth [4–8, 22].

The main trends of 2019 are non–standard formats. The competition for traditional hotels was made by apart–complexes, which appeared on the market last year. This type of real estate is gaining popularity among both private investors and tourists. The latter likes the «homely» atmosphere and multifunctional infrastructure, which is not present in ordinary hotels. That is why the hotel business has to diversify and develop. Regarding the development of hybrid hotels and hostels for active youth, travelers, adventurers, so–called backpackers and flashpackers, we can say that they are becoming more attractive to investors – not only in Kiev but also in other cities of Ukraine. Also positive trends in the hotel market in Kiev can be called Fig.1.

1. Improvement of rating indicators of Ukraine as a whole and Kiev in particular		4. The decrease in the total tourist flow in Kiev compared to the previous year.
Ukraine is becoming more and more attractive for tourists. According to the latest report published by the World Economic Forum in 2019, Ukraine achieved the highest growth in the region in the TTCI index in 2018, rising 10 points and ranking 78th out of 140 countries, Ukraine has improved the business climate (from 124 to 103rd place), security indicator (from 127 to 197 place), openness to foreigners (from 78 to 55 place), and general infrastructure (from 79 to 73 place).		However, since the final stage of the Champions League on football had a significant positive effect on the dynamics of tourist flows in Kiev in 2018, in fact, we can state the return of tourist flows to the level of 2017. If we compare the data for 2019 with 2013–2015, when about 1 visited Kiev annually, 5–2 million tourists, it can be argued about the restoration of tourist flow.
2. The introduction of a more integrated and strategic approach to tourism development by the city administration	THE MAIN TRENDS OF THE HOTEL MARKET KIEV 2018–2019	5. Some revival of development and thawing of hotel projects
The city targeted tourism development program for 2019–2021 was adopted, which consolidates the main directions of development of Kiev, such as «Kiev is the city for the weekend», «Event Kiev», «Kiev is the main tourist hub of Eastern Europe», «Kiev is a comfortable city for the long–distance tourist»		There is a tendency to defrost some hotel projects that have remained frozen for more than 5 years. This may be a result of both a change in the general perception by investors of the political and economic risks of the country, and some improvement in the results of the hotel's operating activities.
3. Continuation of the trend of sustainable development of air transportation and an increase in the number of passenger flows of Kiev metro airports		6. The emergence of new formats on the market in Kiev.
This was mainly facilitated by the release of the world's largest low–cost airline RyanAir in 2018 and the opening of new flights with other low–cost airlines (Wizzair, SkyUp, etc.)		The first capsule hotels Monotel and Monohub appeared, but given their small area (about 300 sq. M), they do not affect the market. Also, service apartments and the aparthotel sector are becoming increasingly popular and an increase in supply is expected in these segments in the market.

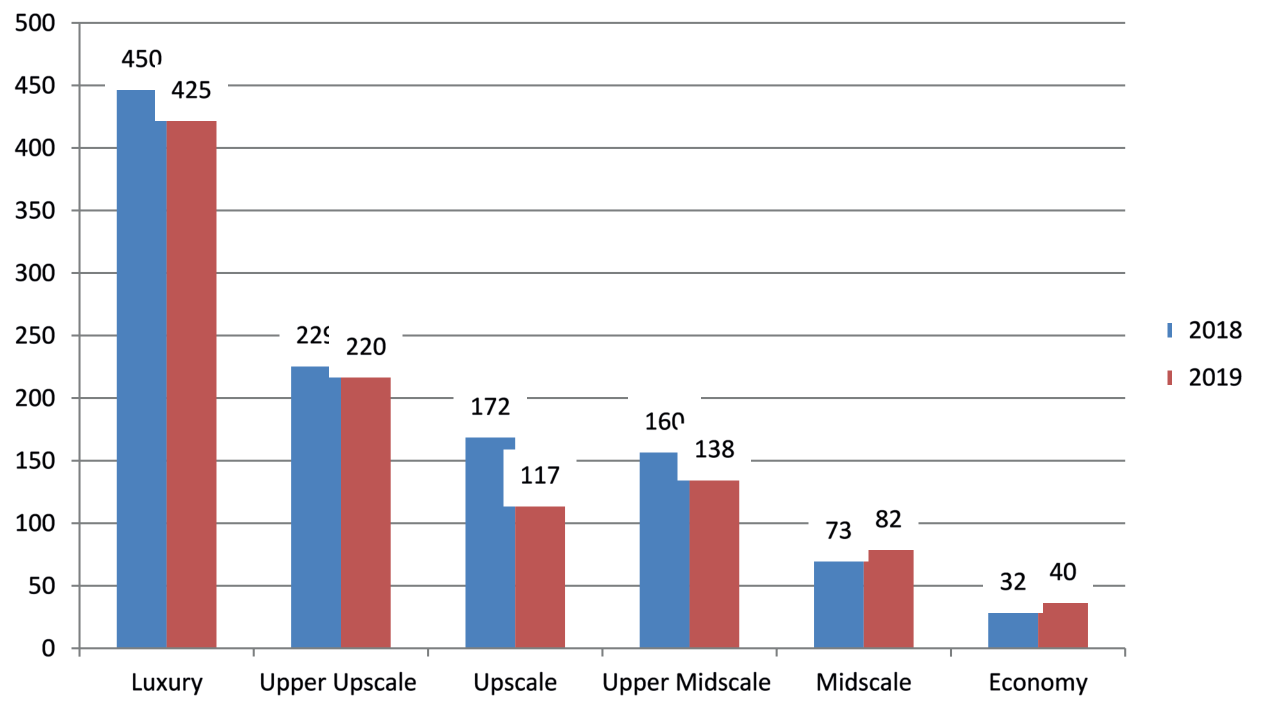
Fig. 1. The main trends of the hotel market in Kiev 2018–2019.

According to DEOL Partners, it was 5–star and 4–star hotels in Kiev that showed a positive download trend. Compared to 2018, this indicator increased by 3–4% (category of 5 stars) and 5–6% (category of 4 stars). At the same time, the indicator of the average price per room (indicator ADR) was unstable, the average difference of its fluctuations was up to $ 10 per month. Average room rates were highest in September and traditionally lower in January. The hotel occupancy rate in Kiev in 2019 showed a static value: in the first half of the year, the average indicator increased to 53% (+ 1.6%), and by the end of the year it was as close as possible to the value of 2018 [12–18, 21].

In the Luxury segment, last year's price fixed at $ 426 (– $ 24 per year), Upper Upscale – $ 220 (– $ 9 per year), Upscale – $ 118 (– $ 54 per year), Upper Midscale – $ 139 (– $ 21 per year), Midscale – $ 82 (+ $ 9 per year), Economy – $ 40 (+ $ 8 per year) (Fig. 2).

Note: the average cost of a standard category room, USD, including VAT.

The dynamics of rack rates (official, published price per room) in dollar terms is greatly influenced by the currency in which the price per room is fixed: for hotels of the highest category is fixed in foreign currency, for hotels of the lower price category – in UAH. Another interesting trend last year was the even bigger gap between the rack rate and ADR, which indicates increased competition, as well as an increase in the share of the business segment compared to individual tourists in the overall structure of demand. It is the client at this stage that sets the vector of hotel business development and pushes hoteliers and developers to experiment. In order not to lose and attract customers in difficult times, it is important to focus the efforts of hotel management on finding new sales channels, launching additional loyalty programs, improving the quality of services. Guests are not attracted by the «meters», but by the impressions and experiences they can gain during their stay at the hotel. Therefore, factors such as unique location, impressive architecture, non–standard design, connection with local culture and immersion in the life of the city become important. The growing rate of tourist flow fails to stimulate the stagnant hotel market. Despite the influx of tourists, developers are in no hurry to enter the market with new facilities. The main constraining factor is the long payback, development and operating costs, political and financial situation in the country, as well as



Note: the average cost of a standard category room, USD, including VAT.

Fig. 2. Dynamics of rack rates of hotels in Kiev as of 2018–2019.

the imperfection of the legal framework for international investment and business tourism development in Ukraine [1–5, 22, 23].

Among the reasons why developers have turned away from hotels is the long payback period compared to other real estate sectors, which still does not match the risks of investing in the segment, and the unavailability of bank financing for most market players. In the current market conditions, the payback period of a quality hotel in Kiev is more than 10 years. This is due to the relatively high cost of development, as well as the operating performance of hotels and the stabilization of cash flow from their activities, which usually takes from 3 to 5 years [7–13, 21, 22].

Losses of the hotel sector in Ukraine during the quarantine of COVID–19 are already estimated in millions of UAH. The highest numbers capture 5–star objects. Their losses amount to UAH 3–8 million and the largest losses are for hotels that operated on business travel, as well as for hotels located in small towns and regional centers outside the flow of business traffic. The main consequences of the COVID–19 for the hotel business in Ukraine, in addition to the lack of guests, closure and falling revenues also include the cash gap. Revenues rapidly became zero. This has led to the need for many companies to send almost all employees on vacation at their own expense until the end of quarantine, to stop advertising campaigns and other expenses. The situation is complicated by the fact that no one yet knows how long the isolation will last and how quickly the flow of guests will recover after its completion. Even if the pandemic is stopped in the fall, the market will not be able to recover its revenues quickly [15, 18, 21, 23].

Conclusions

According to the results of 2018–2019, quite a lot of tourists and guests came to Ukraine. This was facilitated by low–cost flights, and the opening of borders with the European Union, and the growth of brand awareness of the country in the international arena, this, in turn, encourages increased development of tourist attractiveness. We are talking about investments, and about a promotional campaign, and about attracting international capital. Do not forget about the support of the hotel business. Developers need preferences and guarantees in order to see the economic feasibility and viability of the project. There are a number of necessary priority measures to save and mitigate the economic blow from the coronavirus that the industry needs. The hotel business needs the following events:

• prohibit the accrual of fines, penalties and other financial sanctions for the period of quarantine and for 12 months after;

• prohibit charging interest and other payments for the use of credit funds;

• oblige banks and financial institutions to provide deferred payment of funds;

• reduce VAT for hospitality enterprises up to 10%.

In the future, we can say that a large number of new hotels for any macroeconomic forecast should not be expected in the near future, however, in 2020–2022 there will be a moderate increase in the total supply on the market. This is mainly due to the resumption of construction or reconstruction of hotel projects, which either remained frozen for more than 5 years, or were characterized by a slow pace of construction [21–23].

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