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DEVELOPMENT TRENDS OF THE HOTEL INDUSTRY ESTABLISHMENTS IN UKRAINE

Abstract. The tendencies of the modern economy development dictate the necessity to examine the hotel industry establishments as the most important economic, social and cultural category, which plays the leading role in the presentation of the national touristic product on the global market of services. It is the size of the hotel industry, the quality of services provided by the accommodation establishments, which influence the amount of tourists' flows and incomes to the state's treasury. However, it has been found in the course of scientific researches, that currently the key problems, which prevent the development of the hotel industry in Ukraine, are the insufficient number of hotels and similar accommodation establishments in different regions of the country, their imperfect structure and room's capacity, restriction of the range of services provided and etc. The contradictions between the basic legislative documents, which regulate the business's activity of the hotel industry enterprises, significantly complicate their functioning and create barriers for their correct positioning on the market of accommodation services. The purpose of the article is to explain the reasons for implementation into the legislative and scientific sphere such terms as «hotel industry» and «hotel industry establishment», to analyze the existing structure of these establishments on the basis of the analysis of formal statistical data and to outline the tendencies of their development under the modern conditions. The methodological basis of the article is the general scientific and special methods of investigation of: scientific abstractions, theoretical generalization and comparison – for specification of the

conceptual framework, the analysis of the total number of the hotel type establishments; economic and statistical methods (grouping, tabular) – to conduct the analysis of the main aspects for development of tourism accommodation over a period of years. The authors of this article make an analysis of the normative legal documents and scientists' opinions about the basic terminology of the temporary accommodation establishments, and offer on their basis own interpretation of the terms «hotel industry» and «hotel industry establishment»; the structure of the hotel industry establishments is studied, on the basis of which it is concluded that it is not perfect and doesn't meet the existing normative legal norms and documents regarding the accommodation establishments; the basic tendencies of development of the hotel industry establishments on the basis of information about the dynamics of the main aspects of their functioning are show in the article.

Introduction

The key element of the tourism is the hotel industry, the successful activity of which is capable to activate the development of the local economy and to improve the general image of a state among international community. During historical development the hotel industry proved itself as an important economic, social and cultural category, which is extremely important in presenting the national touristic product on the global market of services. It is the size of the hotel industry, the quality of services, rendered by the accommodation establishments, which influences the amounts of tourist flows and the incomes from the tourism into the state Treasury.

The structure of the article includes three principal chapters, with the analysis of the normative legal documents and scientists' opinions about the basic terminology of the temporary accommodation establishments, and offer on their basis own interpretation of the terms «hotel industry» and «hotel industry establishment»; the structure of the hotel industry establishments is studied, on the basis of which it is concluded that it is not perfect and doesn't meet the existing normative legal norms and documents regarding the accommodation establishments; the basic tendencies of development of the hotel industry establishments on the basis of information about

the dynamics of the main aspects of their functioning are shown in the article.

Thus, the purpose of the article is to ground the reasonability of introduction into the legislative and scientific sphere such terms as «hotel industry» and «hotel industry establishment», to considerate the existing structure of these establishments on the basis of the analysis of the official statistical data and to identify the tendencies of their development in modern conditions.

Literature Review. The article is based on the study of the views of foreign and local scientists (Brotherton, 2003; Barrows et al., 2012; Walker, 2017; Jones et al., 2014; Malska & Pandyak, 2012; Nezdoyminov, 2011; Danko et al., 2017), as well as the recommendations of international organizations dealing with tourism (Hotel Classification, 2004; UNWTO; HOTREC; International hotel & Restaurant Association) to cover the essence of the hotel industry, the structure of accommodation establishments and trends of their development. However, it was found from the scientific publications, that currently the key problems, which slow down the development of the hotel industry in Ukraine, are the insufficient number of hotels and similar accommodation establishments in different regions of a country, their imperfect structure by types and hotel room capacity, limits of services provided and etc. The analysis of the normative legal documents (Law «About tourism», 1995; National Standard of Ukraine, 2004 & 2006) and statistical data about development of hotel business of Ukraine (Statistical bulletins, 2015-2017) proves the existence of certain problems in the research vocabulary according as for accommodation establishments. The presence of contradictions between the main legislative documents, which regulate the business activity of the hotel industry establishments, complicates their functioning significantly and creates barriers for the correct its positioning on the market of accommodation services.

Methodology and research methods. The methodological basis of this article is general scientific and special research methods such as: scientific abstraction, theoretical generalization and comparison - to clarify the conceptual constructions, research of the totality of the hotel type establishments; economic and statistical methods (grouping, tabular) – to conduct the analysis of the main aspects for

development of accommodation establishments over a period of years.

To cope with the existing problems and perfection of activity in the hotel facilities of Ukraine, it was offered: to make amendments in to the Law of Ukraine «About tourism»; to introduce at the legislative level the definition of «hotel industry» and «hotel industry establishment»; to create the conditions for more active opening of small capacity hotels; to renovate the terminology of National Standard of Ukraine 4527:2006 «Touristic services. Tourism Accommodation. Terminology»; to improve the structure of collective accommodation establishments and to bring it into conformity with the recommendations of the relevant international organizations. The suggested directions for improvement of functioning of accommodation establishments in Ukraine can be used in the Law of Ukraine «About tourism», and also in the National Standard of Ukraine 4527:2006 «Touristic services. Tourism Accommodation. Terminology».

1. The concept «hotel industry establishment»: terminological clarifications

In the normative legal documents, which constitute the certain rules for conduction of the hotel business and regulate the activity of accommodation establishments, the central place belongs to hotels and similar institutions, which are most commonly identified with the concept «hotel industry». However, this term, which is widely used in scientific professional literature, as well as on practice, has not been reflected in legislative acts and national standards on accommodation establishments yet. Regarding the definition «hotel», now there are various definitions of the given concept, which are either related to the interpretation of its essence in terms of performance criteria, or in terms of its economic activity.

Thus, it is indicated in the National Standard of Ukraine 4268:2003, that «hotel» – it is an «accommodation establishment, with the hotel services rendered, which are not restricted by everyday dressing of beds, cleaning of rooms and bathrooms». The National Standard of Ukraine 4527:2006 specifies, that «hotel» – is an «accommodation establishment, which has a number basis, reception service,

other services which provide the hotel services rendering». In such a way, the «accommodation establishment» – is «any object, where regularly or from time to time, the services of for overnight accommodation are provided» (2004). Therefore, the hotel isn't interpreted as a business entity.

In the context of conducting a business, the most valid definition of the term «hotel» is contained in the Law of Ukraine «About tourism» (1995): «the enterprise of any legal organizational form and form of ownership, which consists of six and more rooms and provides the hotel services for the temporary accommodation with compulsory services». However, it means that all hotels of Ukraine have to be registered as the legal entities.

Meanwhile, the statistical bulletins have the data about such establishments, which are registered as the sole proprietors. And it is worth noting that the number of such hotels owned by self-employed individuals exceeds the number of the hotels – legal entities, however the «hotel» enterprises, registered on the self-employed individuals don't have an official status, which limits the possibility of their positioning on the market of hotel services.

The scientists don't also have any common opinion regarding interpretation of the term «hotel».

Analyzing the works of scientist, which are dedicated to this question, it may be concluded, that the extraordinary majority of them avoid the strict definition of the hotel's legal organizational form, considering as a priority such characteristics as an availability of a hotel room capacity, rendering of a certain complex of services, general management. In addition to that, a number of Ukrainian scientists consider the essence of a hotel namely as an enterprise (Boyko and Hopkalo, 2015; Baylyk and Pisarevskyy, 2015; Samoday, 2013).

However, in our opinion, it isn't practical to consider, that the hotels has to exist only as enterprises. The requirement for mandatory registration of a hotel as a legal entity contradicts the current legislation and causes the restrictions in implementation of activity by sole proprietors in this area of economic management (Galasyuk and Gusyeva, 2011).

It is worth noting that scientists use such concepts as «hotel base», «hotel industry» and «hospitality» to define the totality of collective accommodation establishments of the hotel type. For example, Boiko and Hopkalo (2015) use them during the analysis of statistical data. Putsenteylo (2007) identifies the term «hotel industry» with all hotels and other collective accommodation establishments, including non-profile enterprises, which have on their balance the youth hostels and mountain refuges and other places for a short-term accommodation.

Manachynska (2011) considers the concepts «hotel complex», «hotel industry» and «hospitality» as equal, while investigating the statistical indicators of the development of collective accommodation establishments in Ukraine, there is even the data about the activity of visitors' hostels in their list.

Shkapova (2004) notes, that the «hotel industry – it is a component of the service sphere, the main type of activity of which is reception, accommodation, rendering of different types of services, related to the consumers' staying over the borders of their permanent place of residence. The hotel industry is presented with a variety of enterprises, which belong to such branches of the national economy as: transport, excursion, municipal and others. The hotels have contracts with them».

According to the opinion of Malska and Pandyak (2012) the hotel industry is the «totality of hotel enterprises of different types, which realize the reception and provide services in accommodation, feeding, additional and related services».

However, the term «hotel industry» can't be limited only by economic activity of the hotels, as far as there is a great number of establishments, which are called «similar accommodation establishments and are determined in accordance with the Law of Ukraine «About tourism» (1995) as the «enterprises of any legal organizational form and form of ownership, which consist of the rooms and render the restricted hotel services, including the everyday dressing of beds, cleaning of rooms and lavatories». This term appeared to indicate of a group of establishments, which are similar to the hotels, however they have certain differences (first of all – more narrow range of the services provided).

In our opinion, it is worth to exclude from the definitions «hotel» and «similar

accommodation establishments» the indication that they have to be registered only as legal entities-enterprises.

For introduction of the term «hotel industry» we offer our own definition: «it is a form of entrepreneurship, which is realized by the business entities, presented in the form of hotels and similar accommodation establishments, to render the hotel services with the necessary services». The statement of reasonability of this term lies in the fact that:

- the hotel industry is presented not only as a totality of two groups of the collective accommodation establishments, but also indicates the economic activity conduction to achieve the economic and social results and get income;

- the hotel industry establishments can be registered not only as the legal entity-enterprises, but also as sole entrepreneurs, what will essentially extend the boundaries of the existing hotel fund of a country and will allow to the entrepreneurs to correct in a correct form the own accommodation establishments on the market of hotel services (Galasiuk, 2016).

We offer to consider as the organizational and structural unit in the sphere of hotel industry the «hotel industry establishment», which is a hotel or similar accommodation establishment and offers hotel services with necessary services.

2. Structure of the hotel industry establishments

According to the National Standard of Ukraine 4527:2006, there are 15 types of hotels and 7 types of similar accommodation establishments existing in Ukraine. However, according to the data of the Table 1, it was separated in the structure of the «hotel industry establishments» the «motels», «hotel-office centers», «hostels» (which are considered as the hotels according to National Standard of Ukraine 4527:2006), «tourist base» (which are the similar accommodation establishments). At the same time campings, mountain refuges and hostels for visitors can't be considered as the establishments at all, as they belong to other collective accommodation establishments. So, it is worth to be noted, that not all accommodation objects mentioned in the Table 1 belong exactly to the hotel industry

establishments of Ukraine.

Table 1

Structure of the collective accommodation establishments of Ukraine
in 2015-2017

Types of accommodation establishments	Number of accommodation establishments by years, units																	
	2015			2016			2017											
	Legal entity	self- employed individual	%	Legal entity	self- employed individual	%	Legal entity	self- employed individual	%									
Totally in Ukraine, including:	4341			100			4256			100			4115			100		
1) hotels and similar accommodation establishments:	1021	1457	57,1	980	1554	59,5	940	1534	60,1									
- hotels	729	779	34,8	745	958	40,0	722	982	41,4									
- motels	26	97	2,8	25	114	3,3	26	111	3,3									
- hostels	4	25	0,7	3	37	0,9	2	34	0,9									
- campings	3	3	0,1	3	11	0,3	3	9	0,3									
- living communities for visitors	86	19	2,4	75	15	2,1	69	15	2,0									
- tourist bases, mountain refuges, student summer camps, etc.	173	534	16,3	129	419	12,9	118	383	12,2									
2) specialized accommodation establishments:	1354	509	42,9	1214	508	40,5	1124	517	39,9									
- sanatoriums	184	0	4,2	172	0	4,0	169	0	4,2									
- sanatoriums for children	111	0	2,6	107	0	2,5	103	0	2,5									
- boarding houses with treatment	14	0	0,3	12	0	0,3	12	0	0,3									
- childcare facilities, centers for kids	13	0	0,3	17	0	0,4	14	0	0,3									
- preventoriums	79	0	1,8	63	0	1,5	55	0	1,3									
- balneological hospitals etc	3	0	0,1	3	0	0,1	3	0	0,1									
- rest houses	10	2	0,3	9	2	0,3	9	5	0,3									
- boarding houses	54	10	1,5	51	11	1,5	45	8	1,3									
- recreation centers, other rest establishments (except tourist bases)	875	497	31,6	770	495	29,7	708	504	29,5									
- health institutions for short-term staying	11	0	0,2	10	0	0,2	6	0	0,1									

Sources: Compiled and calculated by the authors on the basis of Statistical bulletins, 2015-2017

On the other side, according to the Ukrainian legislation, the group of hotels

includes the sanatoriums (which according to the international standards have to be included to specialized accommodation establishments, as they execute a strongly pronounced curative function). However, in the statistical bulletins of Ukraine, the data about the sanatoriums activity is in the group of the «specialized accommodation establishments» together with boarding houses, preventoriums, rest houses and recreation centers (which according to National Standard of Ukraine 4527:2006 are similar to hotel establishments).

In such a way, the structure of the hotel industry establishments doesn't correspond to the current normative legal documents of Ukraine and needs to be improved.

The data analysis of the Table 1 for the years of 2015-2017 allows making the following conclusions:

- The total number of the collective accommodation establishments of Ukraine decreased by 5,2%, or by 226 units, mainly due to the reduction of the group «specialized accommodation establishments» (by 222 units).

- The overwhelming majority in the structure of collective accommodation establishments belongs to the group «hotels and similar accommodation establishments» which accounts almost 60% from their total number.

- Despite the fact that the indicators of the group «hotels and similar accommodation establishments» did not change, however, there was a redistribution of their number depending on the organizational and legal form. In such a way, it became less legal entities on 8% (or on 81 units), and the sole proprietors, on the contrary, on more than 5,3% (or on 77 units).

- The composition of the group «hotels and similar accommodation establishments» is represented by legal entities only by 40%, the rest is the sole proprietors, which is unacceptable according to Ukrainian legislation.

- In the group «hotels and similar accommodation establishments» namely the «hotels» contain 75% (including entities and sole proprietors), the other part (25%) – is tourist bases (similar accommodation establishments), and also living

communities for visitors, mountain refuges, student summer camps etc, which hasn't any relation to this group of the collective accommodation establishments.

- Taking into account that according to the Ukrainian legislation as the hotels and similar accommodation establishments are recognized only legal entities, the composition of this group is 759 units, or 31% of their number in the year of 2015, 773 units, or 30% in the year of 2016 and 750 units, or 30% in the year of 2017. It indicates a strongly outlined problem of determining the true capacity of the hotel industry in Ukraine.

- If we use the proposed definition of the term «hotel industry establishment» and analyze the number of hotels and similar accommodation establishments, including the legal entities and sole entrepreneurs, then except of those, which belong to the other groups (living communities for visitors, mountain refuges, student summer camps, child centers) or don't belong to them at all (balneological hospitals), then the capacity of the hotel industry of Ukraine will be almost 90-95% of the total number of collective accommodation establishments.

- But, it is worth to note that the terms, which are contained in the normative legal documents of Ukraine do not always coincide with the recommendations of profile international organizations. Therefore, the composition of collective accommodation establishments in individual groups has to be brought into compliance with the documents, which are recommended by the World Tourism Organization.

3. Dynamics of the key indicators of activity of the hotel industry establishments of Ukraine

To identify the development tendencies of the hotel industry establishments of Ukraine, it is necessary to analyze the key indicators of their activity in the dynamics over the years. At the same time it is studied in the Table 2 the indicators, characterizing the activity of the group «hotels and similar accommodation establishments», which are registered as legal entities and sole entrepreneurs.

Table 2

The key indicators of functioning of the hotel industry establishments of Ukraine
in 2015-2017

Indicators	Meaning of indicators by the years						Change of the indicator's means 2017-2015, %
	2015		2016		2017		
	Totally	%	Totally	%	Totally	%	
One-time capacity of the hotel industry establishment (places), including:	132535	100	135916	100	133396	100	+ 0,6 %
- legal entities	93186	70	89843	66	87882	66	- 5,7 %
- entrepreneurs	39349	30	46073	34	45514	34	+ 15,7 %
Duration of visitor's staying in the hotel industry establishments (persons-days), including:	9158417	100	10158236	100	10336363	100	+12,9 %
- legal entities	6940922	76	7522267	74	7708079	74	+ 11,1 %
- entrepreneurs	2217495	24	2635969	26	2628284	26	+18,5 %
The total amount of the served visitors (persons), including:	4297190	100	5037075	100	5135164	100	+ 19,5 %
- legal entities	3202322	75	3685463	73	3792576	74	+ 18,4 %
- entrepreneurs	1094868	25	1351612	27	1342588	26	+ 22,6 %
Filling capacity level of the hotel industry enterprise (%), including:	18,9	x	20,4	x	21,2	x	+ 12,2 %
- legal entities	20,4	x	22,9	x	24,0	x	+ 17,6 %
- entrepreneurs	15,4	x	15,6	x	15,8	x	+ 2,6 %
Number of hotel industry establishments (unit), including:	2478	100	2534	100	2474	100	- 0,2 %
- legal entities	1021	41	980	38	940	38	- 7,9 %
- entrepreneurs	1457	59	1554	62	1534	62	+ 5,3 %
Average capacity of the hotel industry establishments (places), including:	53	x	54	x	54	x	+ 1,9 %
- legal entities	91	x	92	x	93	x	+ 2,2 %
- entrepreneurs	27	x	30	x	30	x	+ 11,1 %

Sources: Compiled and calculated by the authors on the basis of Statistical bulletins, 2015-2017

The study of the one-time capacity of the hotel industry establishments certifies about its moderate increase (on 0,6%) over the three studied years. However, in comparison with the indicators of the year 2016 in the next year was its decrease on 2%, or on 2520 places. According to the results of the year 2017, there were near 133,4 thousand bed-places in Ukraine. However, to compare the total capacity of the hotel base of different countries, the most often used indicator is the one which characterizes the number of hotel places with to 1 thousand of local inhabitants, the average European value of which is 10. This indicator varies, in the leading touristic states, from 26 in Switzerland and Spain to 55 in Greece. In Ukraine it is equal only to 3,5 (where the hotel places are considered together with the accommodation in the living communities), that certifies clearly about the insufficient development of the hotel services on the market.

The duration of the visitors' stay in the hotel industry establishments increased on 12,9%, what is a positive tendency. However, the average time of their stay is small and equals only 2 days.

One of the effective indicators of the functioning efficiency of the hotel industry establishments is the level of their filling capacity. In the tourist-developed countries of Europe, North America, Asia and Australia, it is more than 70% (Portal for statistics). In Ukraine, this indicator has the tendency to increase, but it is realized slowly and shows very bad results. In such a way, according to the general ranging, it appeared at the level of 20%, legal entities – 23-24%, and sole entrepreneurs – 15%. This testifies about imperfect use of capacity of the hotel industry establishments, which are actually filled in only in summer season, and there are great difficulties with it in the remaining part of the year.

The number of people, who slept in the hotel industry establishments, increased by almost 20% over three years and composed 5,1 million. Though, according to the data of the World Tourism Organization and the State Statistics Service of Ukraine (2017), there were 14,2 million of foreign tourists, who visited our country in 2017, which is three times more than it was fixed by the hotel type establishments. And this does not include local tourists. Therefore, we assume that

the overwhelming majority of tourists are placed not in collective, but in individual accommodation establishments (private flats, houses, villas, apartments), which are not reported to the statistical authorities.

In such a way, the actual capacity of the hotel base of Ukraine is not known, what is caused by the imperfection of existing normative legal documents, which manage the activities of accommodation establishments. This argument is confirmed by the analysis of the average capacity of the hotel industry establishments, which is for legal entities more than 90 places, for sole entrepreneurs – 30 places. According to the Ukrainian legislation, exactly this number of places has to be present, to be considered as the part of collective accommodation establishments. Therefore, the numerous individual accommodation establishments, which are officially able to conduct business without proper registration, do not pay taxes and other types of mandatory payments. It is worth noting that the owners or renters of the individual accommodation establishments have to be registered by the local executive authorities, to have a book of guest registration, and to submit annually a declaration on personal incomes to the tax inspection for tax charges. However, due to lack of control functions over this area of activity, Ukraine loses a lot of revenues to the state budget.

Conclusions

The findings of the study confirm that due to imperfection of the normative legal base for the hotel business conduction and for realization of statistical observations, the actual capacity of hotel industry is unknown.

The prevailed number of owners or renters of the individual accommodation establishments do not report to state statistics bodies and do not pay a tax, that is why the country loses a significant amount of funds to the state budget.

The analysis of the key indicators of the activity of hotel industry establishments certifies about the existence of such positive tendencies, as an increase of one-time hotel capacity among sole entrepreneurs; the growth of the visitors number and of their staying duration; increase of the hotel filling. However, all these indicators have low values, which do not correspond to the existing touristic and

recreational resources of our country.

There are also some negative tendencies in the development of the hotel base of Ukraine: insufficient capacity of the hotel industry; imperfect structure of its institutions; reduction of capacity of accommodation establishments, especially of those, which are registered as legal entities; closure of many types of establishments during the studied period of time; the low values of the vast majority of key indicators, despite of some their increase.

To overcome the existing problems and to improve the activity in the hotel industry we offer:

- To remove from the Law of Ukraine «About tourism» the provision, according to which a hotel and a similar accommodation establishment can be exclusively a legal entity, as it restricts the rights of the sole entrepreneurs of hotel business, significantly decreases the market frames of the hotel services and doesn't permit the accommodation establishments, registered on a sole entrepreneur, to receive certain categories.

- To introduce on a legislative level the terms «hotel industry» and «hotel industry establishment» in the variant offered in the article above.

- To review decreasingly the norm regarding the distribution of accommodation establishments on collective and individual, which is now set at the level of 30 places for the organization of overnight stay, and also to introduce an effective mechanism for monitoring individual accommodation establishments regarding the conduction of their activities and submission of tax reports, taking into account the world experience.

- To create the conditions for more active opening of hotels with a small capacity, which always have the possibility to conduct flexible pricing policy and to adapt to the needs of their guests better.

- To renew the terminology of National Standard of Ukraine 4527:2006 «Touristic services. Tourism Accommodation. Terminology» and to coordinate the types of accommodation establishments, according to which the statistical observations are realized in view of form No.1-CAE «Report on the activities of

Collective Accommodation Establishments», with the modernized requirements of this national standard.

– To improve the structure of collective accommodation establishments and to make them meet recommendations of the relevant international organizations.

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