

ANALYSIS OF THE MAIN TRENDS IN THE HOTEL AND RESTAURANT INDUSTRY OF UKRAINE UNDER THE CONDITIONS OF THE COVID-19 PANDEMIC

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Purpose: The purpose of the article is to research and analyze the main trends in the hotel and restaurant industry of Ukraine under the conditions of the COVID-19 pandemic, to identify the main problems of business entities in the field of hospitality and to outline the prospects for its further development.

Design/methodology/approach: In the research process, general scientific methods were used – information collection, its analytical processing, theoretical generalization and comparison; graphic method – to illustrate the dynamics of the indicators studied in the work. The object of the study is the activity of enterprises of the hotel and restaurant industry in Ukraine. The subject of the study is the peculiarities of the functioning of domestic enterprises of the hotel and restaurant business in the conditions of the COVID-19 pandemic. The information base of the research became theoretical and methodological developments of domestic and foreign authors, materials of periodicals; statistical data of the State Statistics Service of Ukraine; research of the Association of Hotels and Resorts of Ukraine (UHRA); informational materials of the National Tourist Organization of Ukraine.

Findings: The article provides an analysis of the efficiency of the hotel and restaurant business. In article is shown the negative impact of the pandemic on the development of the hotel and restaurant industry in Ukraine. The analysis of the consequences of the COVID-19 pandemic showed that the hotel and restaurant business needs the implementation of complex innovative approaches in various spheres of activity.

Practical implications: Based on the analysis of the theoretical and methodological principles and trends in the development of the hotel and restaurant business in Ukraine during the pandemic, were summarized practical recommendations and were substantiated a measures aimed at overcoming the consequences of the crisis and improving the efficiency of the enterprises.

Originality/value: The results of the conducted research will contribute to the improvement of the management system of hotel and restaurant business enterprises and increase their competitiveness on the domestic and international markets.

Keywords: hotel and restaurant business, COVID-19 pandemic, crisis, trends, development.

Category of the paper: Research paper.

1. Introduction

The spread of the COVID-19 disease and the introduction of strict quarantine restrictions has become a serious test for humanity in the 21st century. The pandemic led to significant human losses and to major changes in the political, social, economic, religious and financial systems of the world. More than 80 countries have closed their borders. A large number of enterprises and institutions were forced to switch to remote work or suspend their activities. The world's largest economies such countries like the USA, China, Japan, Germany, Great Britain, France, India, Italy, Brazil and Canada, suffered significant losses (Makalyuk, & Kysil, 2021). Restrictive measures, which introduced because of the spread of COVID-19 on the Ukraine territory, had a significant impact on the national economy (Quarantine measures, 2021). Non-food stores, restaurants, public catering establishments, night clubs, shopping and entertainment centers were closed for long periods. The pandemic affected the sharp restriction of mass events, international and national flights, which caused a decrease in demand on different types of goods and services. Analysis of the main restrictive measures shows that the pandemic had a negative impact on the service sector, in particular – tourism sphere, hotel-restaurant and entertainment business.

An important component of the hospitality industry is the hotel and restaurant business, which develops in close relationship with the tourism industry. The effective functioning of these industries is a positive indicator of changes in the economy of the state and its regions and is an important prerequisite for intensifying the development of international relations. Most analysts predict that international travel and tourism will return to normal levels by 2025 (Jones, Palumbo, & Brown, 2021). After the relaxation of quarantine measures, a large part of catering establishments (about 86%) resumed their activities, at the same time, a number of representatives of the hotel and restaurant business could not overcome the consequences of the crisis and went bankrupt (Vozovych et al., 2021).

So, the COVID-19 pandemic became a factor that made adjustments to the work of almost all subjects of economic activity, especially, establishments in the hotel and restaurant sector. The hotel and restaurant business faced the task of rethinking priority directions and finding new forms of activity. Thus, the purpose of the research is to analyze the main trends in the hotel and restaurant industry of Ukraine in the conditions of the COVID-19 pandemic, to identify the main problems of the business entities of the hospitality sector and to outline the prospects for its further development.

2. The hotel and restaurant industry in the context of the COVID-19 pandemic: a literature review and statement of the problem

In scientific works, are actively investigated the problems of the impact of the pandemic on the economy and its individual branches. In addition, statistical data are periodically published by: relevant ministries, the World Health Organization, heads of state, representatives of the headquarters for controlling the spread of the coronavirus and statistical agencies, leading economists, political scientists and other experts.

The work is devoted to the study of global economic effects due to the spread of the coronavirus disease (Jackson et al., 2021). The work presents the results of the analysis caused by the impact of pandemic on the economy of the different countries (Razumova, But, & Butsanova, 2022). The work examines the impact of COVID-19 on the economic situation in Ukraine, identifies socio-economic losses, and analyzes the global experience of overcoming the negative consequences of the pandemic. (Onyshchenko, Sivitska, & Cherviak, 2021).

Considerable attention of scientists is devoted to the study of the impact of the consequences of the pandemic on the activities of enterprises of the hotel and restaurant industry. In particular, the article analyzes the impact of COVID-19 on the global hospitality industry, highlights the significant negative consequences of the pandemic for many areas of hospitality, and presents a selection of modern information sources dedicated to the relevant topic (Fowler, 2022). The author studied the practical experience of restaurants during three important stages of their operation – «before COVID-19», «during COVID-19» and «after COVID-19» (Wahab, 2021).

Scientists have studied different management methods which can help bringing out the tourism industry and hospitality of the crisis in different countries (Androniceanu, 2020; McCartney, 2020); analyzed state regulatory measures for the tourism sector and hospitality, as well as local regional response tools to the global pandemic crisis in the European Union (Sanabria-Díaz, Aguiar-Quintan, & Araujo-Cabrera, 2021). Also, in a number of works, investigated anti-pandemic precautions, which implemented in the hotel business and their effectiveness in terms of tourist satisfaction (Davras, & Durgun, 2022); was carried out the risk assessment in the context of COVID-19 (Gursoy, & Chi, 2020).

Based on the analysis of the activities of hotel enterprises in the regions of Ukraine (Hromyk, 2022) it is shown that the hotel market is witnessing increased competition from global hotel concerns. Therefore, hotel enterprises try to increase their productivity and competitiveness by implementing effective methods of organization and management.

The article (Slava, Chyniak, & Puhinska, 2021) presents the results of a study of the intra-organizational features and operating conditions of hotels in a separate region of Ukraine in the context of the global spread of the COVID-19 and summarizes proposals for organizational and technological solutions to eliminate or minimize the impact of the pandemic.

In the scientific work are highlighted the main problems of the development of hotel and restaurant business enterprises; was confirmed the importance of ensuring the quality of products and services for the effective functioning of institutions; is defined the role of image in the formation of the competitiveness of establishments in the hotel and restaurant sphere. (Mukha, 2021)

At the same time, the unstable market environment and the realities of the modern world, caused by the impact of the pandemic, actualize the further development of research into the main trends of the hotel and restaurant industry, the outline of key problems and further prospects for its development.

3. Research methodology

In the research process, general scientific methods were used – information collection, its analytical processing, theoretical generalization and comparison; graphic method – to illustrate the dynamics of the indicators studied in the work. The object of the study is the activity of enterprises of the hotel and restaurant industry in Ukraine. The subject of the study is the peculiarities of the functioning of domestic enterprises of the hotel and restaurant business in the conditions of the COVID-19 pandemic. The information base of the research became theoretical and methodological developments of domestic and foreign authors, materials of periodicals; statistical data of the State Statistics Service of Ukraine; research of the Association of Hotels and Resorts of Ukraine (UHRA); informational materials of the National Tourist Organization of Ukraine.

4. Study of the main trends in the hotel and restaurant industry of Ukraine in the conditions of the Covid-19 pandemic

The hospitality industry includes the following main elements: accommodation facilities (hotels, hostels, camping sites, etc.); food establishments (cafes, restaurants, canteens, bars); tourism; transport; entertainment; social and cultural institutions. As a result, of the introduction of quarantine restrictions on March 12, 2020, were established transportation limits or a complete ban on passenger transportation, which led to a significant reduction in international and domestic tourist flows. Thus, if during 2015-2019, approximately 12-14 million people entered Ukraine every year, then in 2020 this indicator decreased to approximately 3.4 million people (Fig. 1).

The specified factors caused a decrease in the number of hotel guests (Fig. 2), and as a result, a reduction in the use of their room stock (Fig. 3).

The analysis of the given static dependencies shows that the largest number of guests in collective accommodation facilities was observed in 2012-2013. At the same time, the decrease in the indicator in 2014 is a consequence of the temporary occupation of the territory of the Autonomous Republic of Crimea, the city of Sevastopol and part of the territories in the Donetsk and Luhansk regions.

However, for the period of 2015-2018, there is a recovery of the hotel industry and, accordingly, an increase in the total number of people in accommodation facilities by 29.2% compared to 2014. At the same time, it should be noted that this increase was mainly due to domestic tourism of Ukrainian citizens. In 2020, there is a significant decrease in the number of people in institutions compared to 2019 (by 51.8%), which is precisely the result of the COVID-19 pandemic.

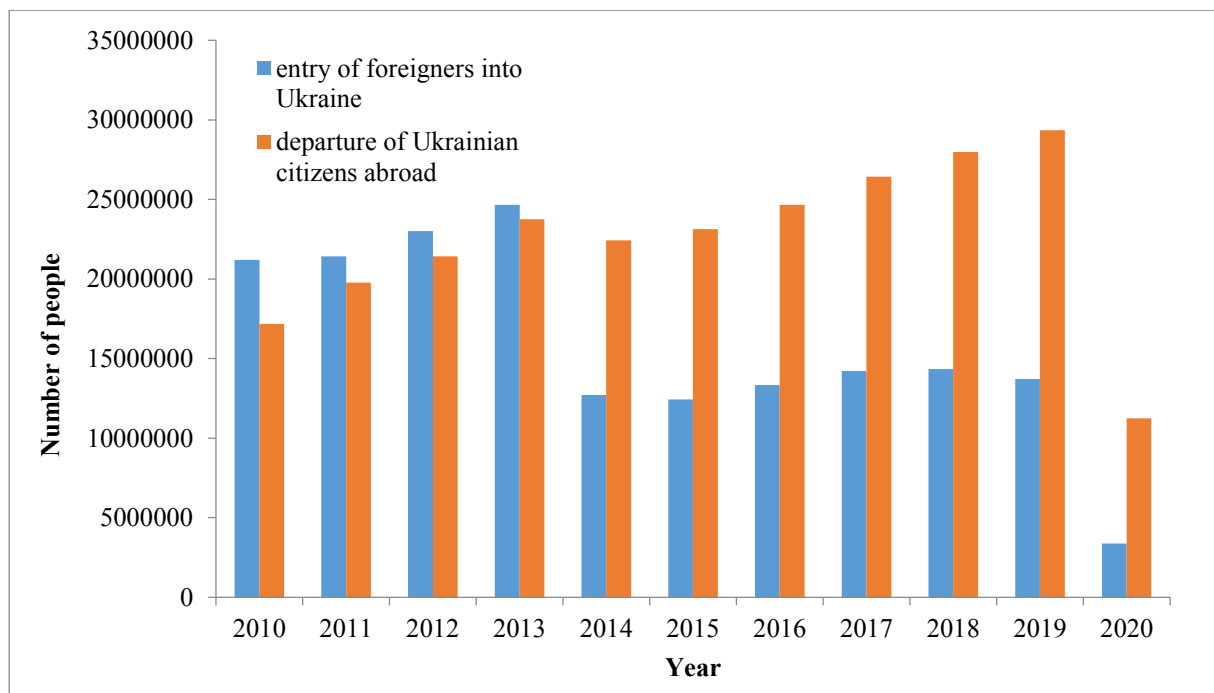


Figure 1. Entry of foreigners and stateless persons into Ukraine and departure of Ukrainian citizens abroad, persons. Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

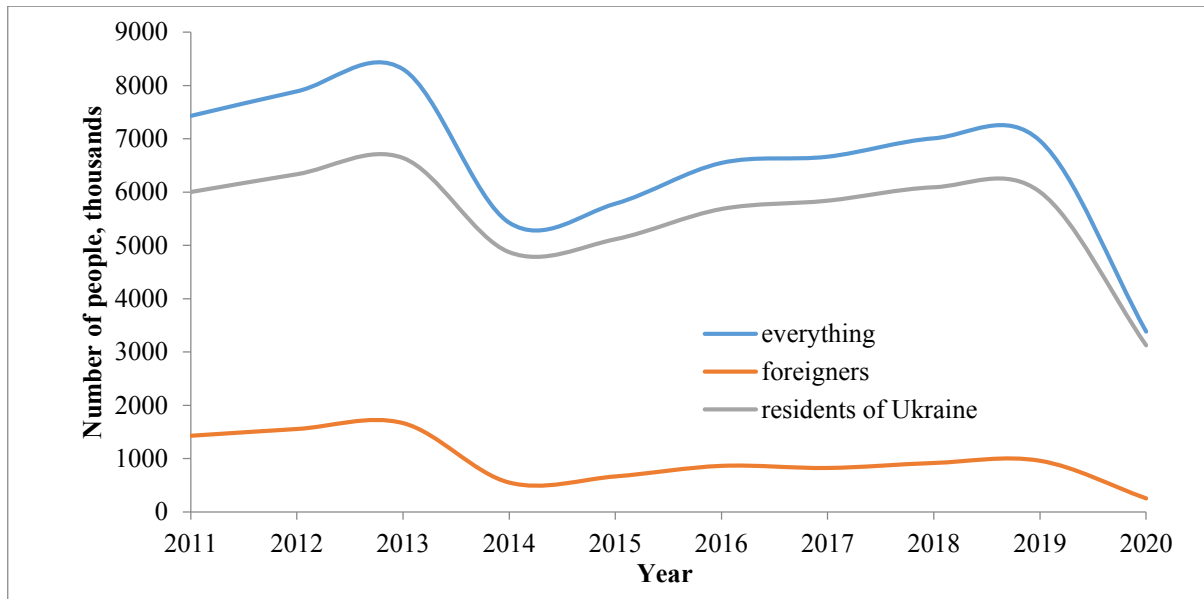


Figure 2. The number of persons who were in collective means of accommodation, thousands of persons (2014-2020 – excluding the temporarily occupied territory of the Autonomous Republic of Crimea, the city of Sevastopol and part of the temporarily occupied territories in the Donetsk and Luhansk regions). Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

The analysis of indicators of the efficiency of the institutions in the period 2015-2020 (Fig. 3) showed that despite the increase in the number of people who stayed in institutions of collective accommodation, there is a decrease in the total number of days of their stay.

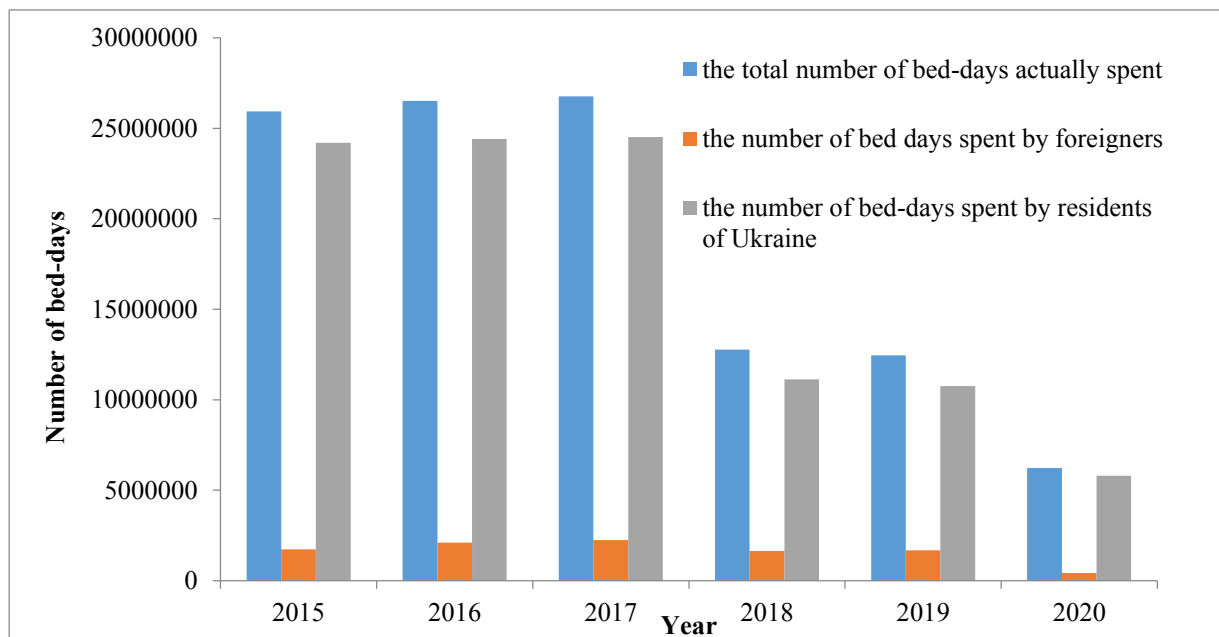


Figure 3. The number of bed-days actually spent in collective means of accommodation. Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

The number of foreign tourists and, accordingly, days of stay changed slightly in the period 2015-2019. In 2020, the number of days of stay of foreign citizens in hotel establishments decreased by almost 4 times compared to 2019.

The decrease in citizens' incomes and the introduction of restrictive measures led to a reduction in household spending on services (Fig. 4). So, for example, the share of total spending on restaurants and hotels (per month) in total consumer spending in 2019 was 2.6%, and in 2020 it decreased to 1.55%. In general, household spending on restaurants and hotels in 2020 decreased by 41.3% compared to the previous year.

Accordingly, in 2020, there was also a reduction in the volumes of products sold by business entities belonging to the hospitality sector. Thus, the volume of sold products of hotels and similar means of temporary accommodation in 2020 decreased by 40.57% and amounted to 8.5 billion UAH, while in 2019 the specified indicator amounted to 14.3 billion UAH (Fig. 5).

A decrease in the volume of sold products is also observed in the field of food services (Fig. 6). In 2020, the activities of restaurants and the provision of mobile catering services reduced the volume of product sales by 4.6% compared to 2019; beverage service – by 9.8%.

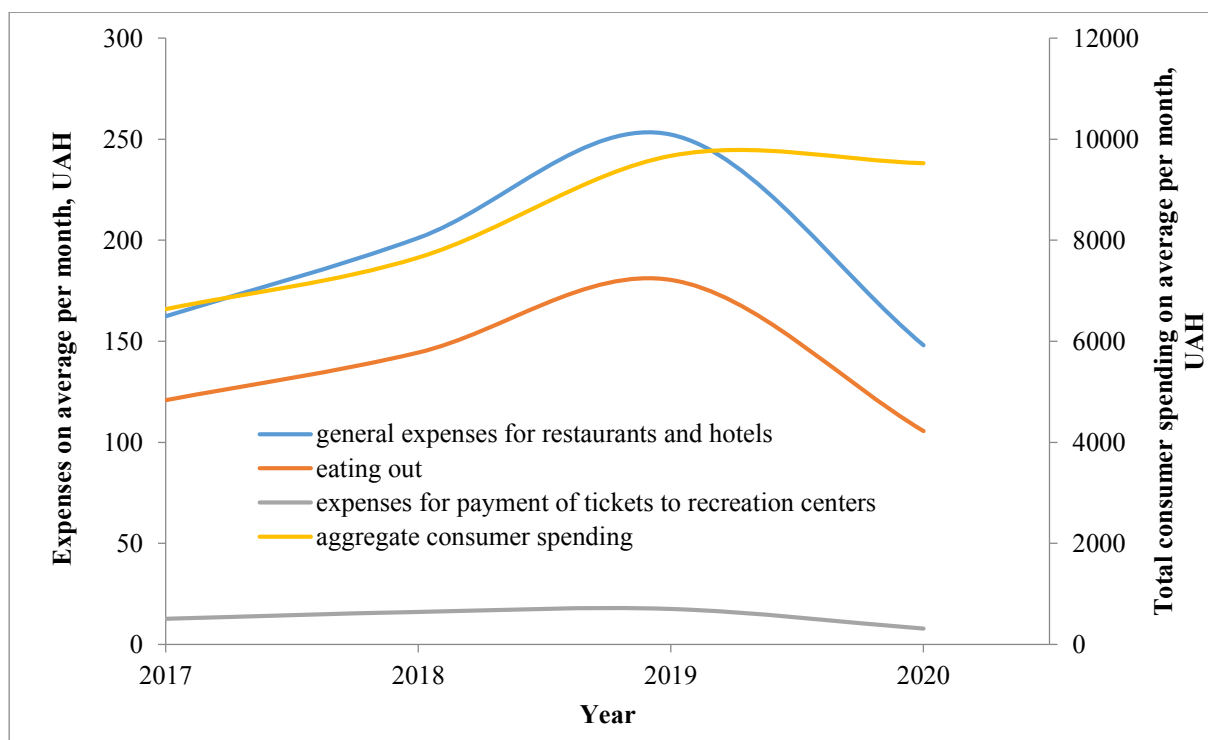


Figure 4. Expenses of Ukrainian households on restaurants and hotels (monthly average), UAH. Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

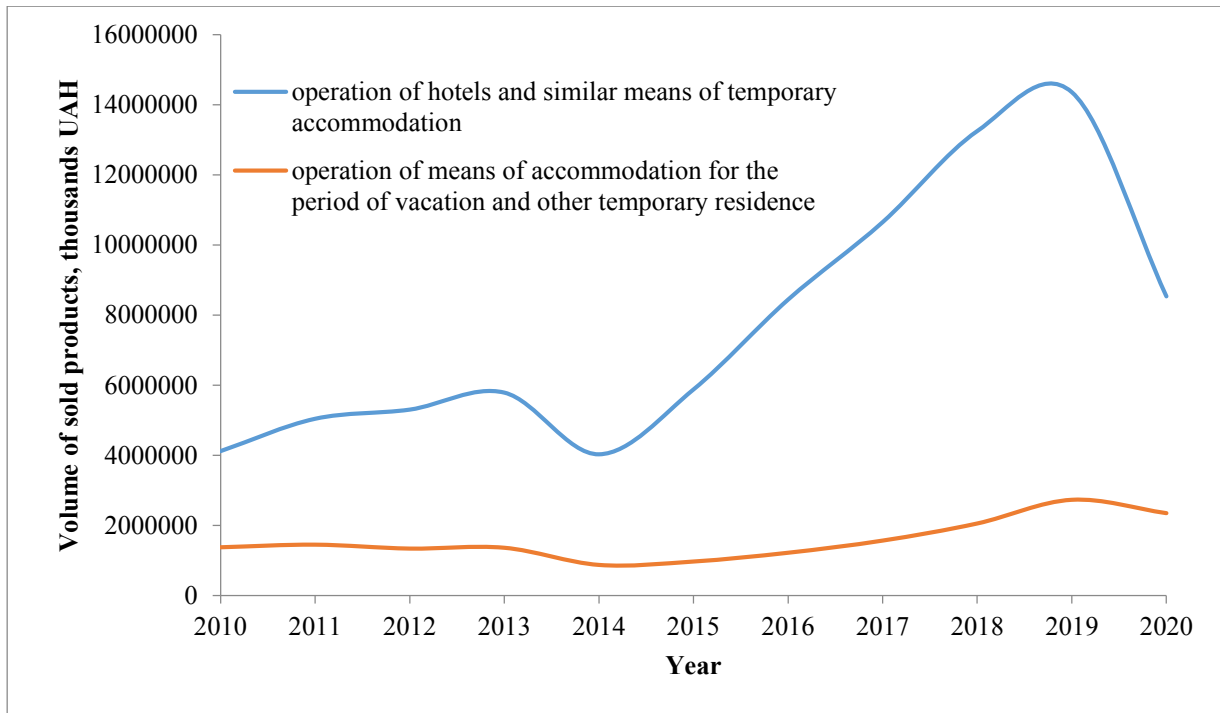


Figure 5. Volume of sold products (goods, services) of economic entities by types of economic activity (accommodation services) in 2010-2020 (thousand UAH). Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

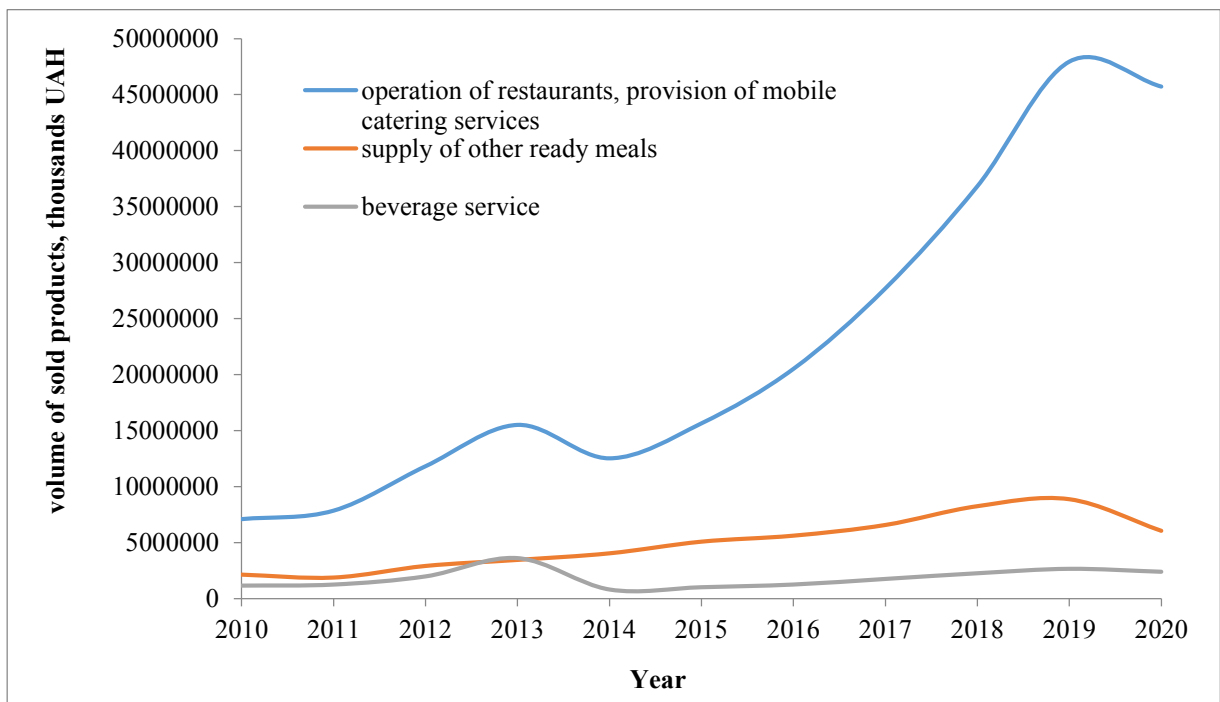


Figure 6. Volume of sold products (goods, services) of business entities by type of economic activity (food and beverage services) in 2010-2020 (thousand UAH). Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

Consequently, the reduction of tourist trips and the introduction of quarantine restrictions led to a decrease in the profitability of the operation of enterprises in the hotel and restaurant industry (Fig. 7), as well as significant financial losses. Thus, according to the research of the Association of Hotels and Resorts of Ukraine (UHRA), 93% of respondents confirmed a general decline in the level of revenue of their hotel, in 21% of hotels the gross revenue decreased by 25-40%, in a third of hotels – by 40-60%, in 30 % of hotels such reductions reached more than 60%, only 4% of hotels showed an increase in annual revenue, and in 3% it remained at the same level (Assessment of the impact of COVID-19 on the hotel industry of Ukraine, 2021).

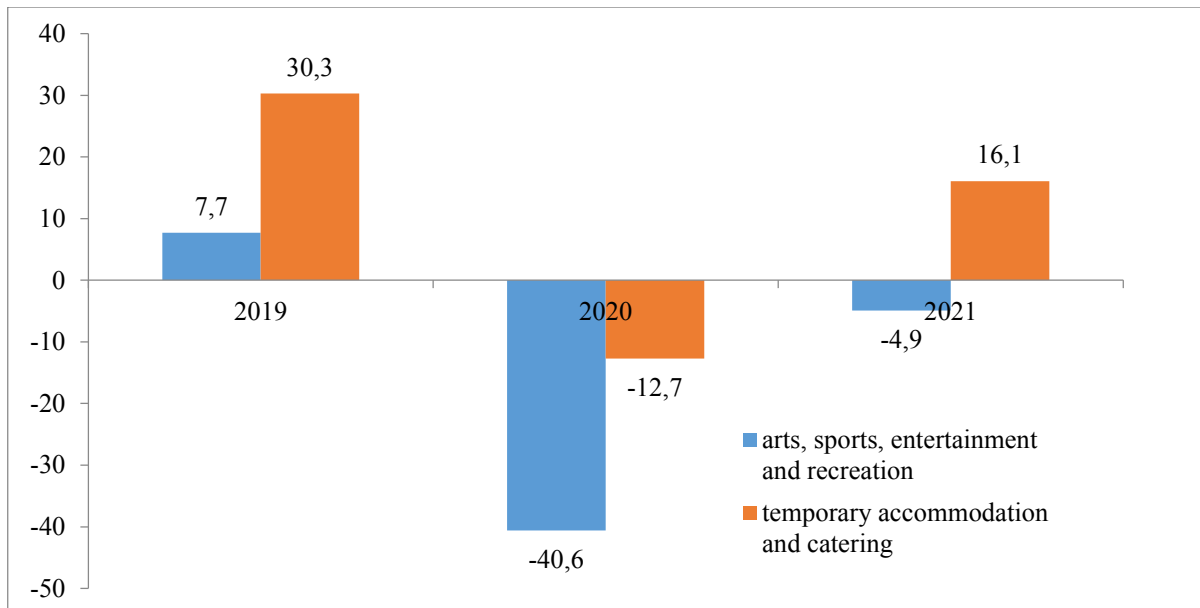


Figure. 7. Profitability of operating activities of temporary accommodation, catering, entertainment and recreation enterprises in 2019-2021. Source: compiled by the authors based on data (State Statistics Service of Ukraine, 2019-2021).

Also, in 2020 year compared to 2019 year, recorded a decrease on 39.9% in the volume of capital investments in the restaurant business and on 14.5% in the field of temporary accommodation (Fig. 8).

In fig. 9 presents a description of the main measures that hotel enterprises had to take in order to optimize their costs during the COVID-19 pandemic.

Thus, the majority of hotel enterprises during the 2020 year (66%) were forced to reduce the number of employees and reduce the prices of services. Among other areas of activity optimization, the following should be highlighted: introduction of alternative services (co-working, renting rooms for offices) – 27%; improvement of marketing and information tools – 33.3%. Improvement of products and services in order to improve their quality became an important direction of organizational measures aimed at increasing the competitive advantages of hotel enterprises (63%).

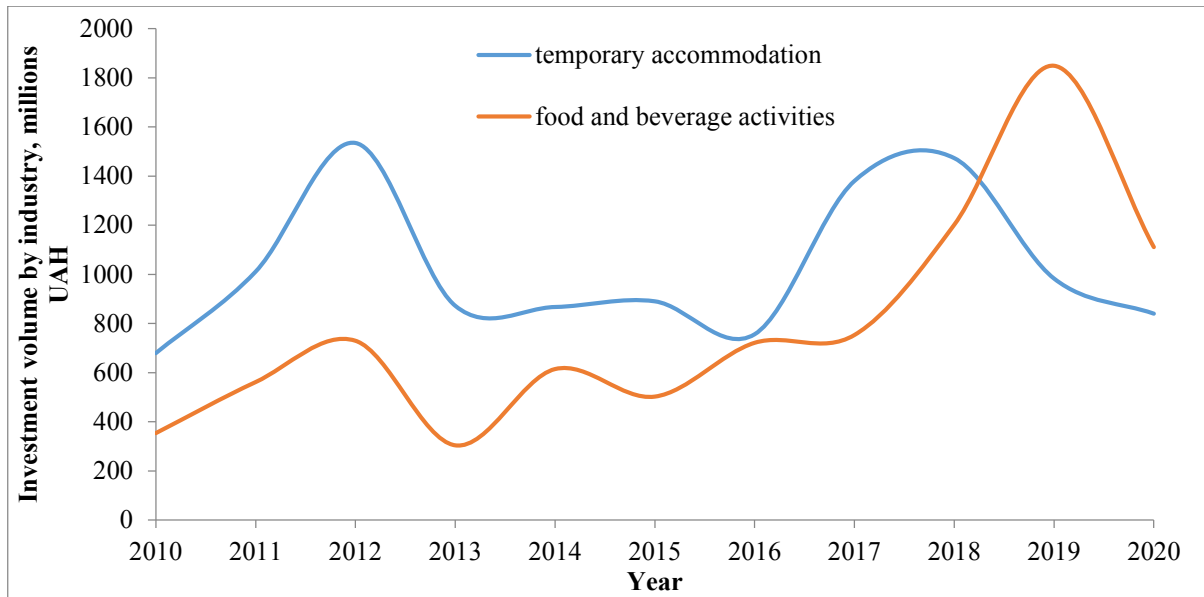


Figure 8. Capital investments by types of economic activity for 2010-2020 (million UAH). Source: compiled by the authors based on data (Tourist Barometer of Ukraine, 2021).

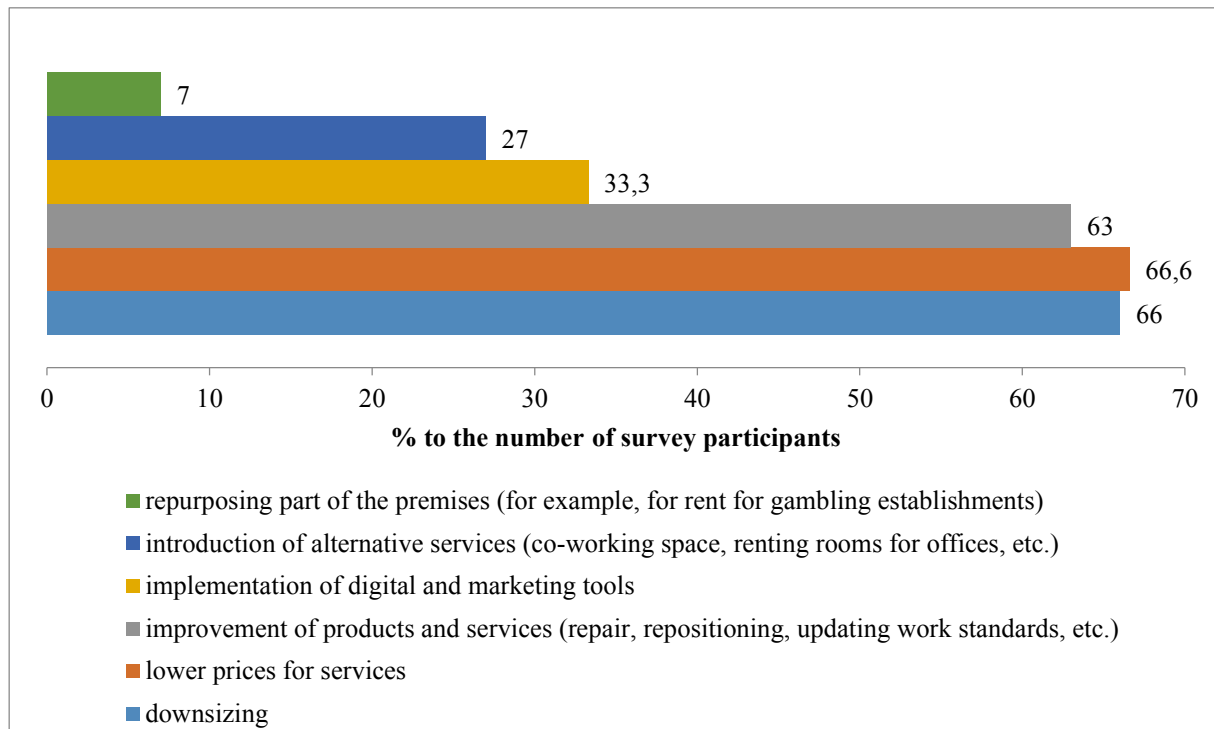


Figure 9. Measures implemented by hotel enterprises in order to optimize their costs, percentage of the number of interviewed representatives. Source: compiled by the authors based on data (Assessment of the impact of COVID-19 on the hotel industry of Ukraine, 2021).

It is also worth noting that, in addition to the negative factors associated with the spread of the coronavirus disease, a number of other problems are characteristic of the restaurant and hotel business enterprises in Ukraine, in particular (Sokolenko, & Onoprienko, 2020; Novykova, 2020):

- insufficient level of satisfaction of consumer requirements,
- shortcomings of the quality management system at enterprises,
- insufficient level of management in institution,
- low level of qualification of staff and quality of service provision,
- insufficient advertising activity of institutions and an imperfect image strategy,
- insufficient number of hotels capable of providing quality accommodation services,
- lack of a well-developed network of alternative means of accommodation of a more economical nature for tourists (f.e. hostels, small hotels, etc.).

5. Discussion

The hotel and restaurant business and tourism is one of the key sectors for the development of the economy of both the region and the country as a whole. In Ukraine, this area has significant potential, since the market of hotel and restaurant services has not yet reached full saturation and characterized by favorable conditions for attracting both internal and external additional investment resources.

In modern conditions caused by the spread of the COVID-19 and the introduction of quarantine restrictions, the enterprises of the hotel and restaurant industry forced to develop new mechanisms for the preservation and development of their business. As well as they must to adaptation to new conditions of the external environment. As mentioned above, the hotel and restaurant business suffered significant losses as a result of the pandemic, which is primarily due to long-term bans and restrictions on movement, settlement, business trips, tourism, mass celebrations. The format of most communication events (conferences, meetings, meetings) has been changed to remote.

To date, there are certain trends regarding the improvement of the hospitality industry (table 1). For example, the improvement of the quality of hotel services is due to the increase in demand for more comfortable accommodation, and this should be taken into account by middle-class hotels, for which the improvement of the comfort of rooms can be a key point for increasing the number of customers.

Table 1.

Measures aimed at overcoming the consequences of the COVID-19 pandemic and improving the efficiency of the hotel and restaurant business

A group of activities	Content of events
Sanitary and hygienic	temperature screening of employees; installation of protective screens between employees and visitors; strengthening of requirements for cleaning premises; provision of antiseptic and other means of protection; social distancing.
Digitization of technological process	use of digital keys and software for remote control of processes in hotel rooms (control of safes, heating systems, air conditioning, etc.); access to the menu via QR codes and contactless payment.
Organizational and managerial	use of chatbots for quick response to customer requests; introduction of a system of preliminary online registration of hotel customers; use of online scoreboards/desktops for orders in cafes and restaurants; implementation of Kitchen Display Systems – a communication system of restaurant services for prompt transfer of orders from waiters to the kitchen, tracking the time of order fulfillment and controlling the need to replenish stocks; creation of own and involvement of third-party specialized delivery services.
Volumetric planning	use of the open space of the institution (terraces, roofs); flexible space planning (mobile furniture, chairs and sofas with high backs; screens and partitions for zoning); arrangement of zones for issuing orders with self-delivery.

Source: summarized by the authors based on (Krukovska, 2022; Novikova, 2020; Sokolenko, & Onoprienko, 2020; Sheiko, 2021).

Also need improvement the hotel approaches operational management, hotel promotion, corporate approach to sales and reservations, etc. At the same time, for effective organizational and economic provision of services in the hospitality industry, enterprises must adhere to the principles and rules of their provision (Ihnatenko et al., 2019). The priority of importance are ethical principles (honesty, intelligence, benevolence, tact, delicacy, education); ecological principles (the provision of services should not harm the environment, other people); cost-effectiveness principles (services should be useful for consumers and providers, should save time and prevent its unproductive expenses); principles of quality and professionalism; principles of legality and safety.

In addition, in the conditions of the pandemic, an effective solution was the introduction of state support measures for hotel and restaurant businesses: tax relief, direct subsidies, employment support or payments to employees who lost their jobs; activation of employment centers for employment, etc. (Krukovska, 2022).

It is also worth paying attention to a number of technological and informational changes and innovative trends that characterize the development of the hospitality industry in recent years (Sheiko, 2021): strengthening of sanitary and hygienic requirements; development of non-contact technologies for managing processes in hotel rooms via the Internet; implementation of operational communication systems of restaurant services; expansion of delivery services by setting up own and using the services of specialized services; changing interior planning solutions in order to increase the open space for consumers.

At the same time, the principle of safety of services in modern conditions becomes especially relevant (Krukovska, 2022). The spread of the COVID-19 pandemic led to the introduction of strengthened anti-epidemiological, organizational and economic measures for

the provision of services regulated both at the global and national levels. Digitization of industry objects (transition to online sales, payments, reservations) greatly simplifies and lowers the cost of business processes, but requires a more complete elimination of risks regarding the reliability of the preservation of commercial secrets, personal data, etc.

So, the modern component of the hotel and restaurant business is the information space, which complements the above-mentioned elements of the hospitality sphere. The information sphere of business is represented by sites, services, reference information, advertising and contributes to the improvement of the provision of hospitality services (Romanukha et al., 2021). In the hotel business, an important component of development is the segmentation of the target audience and the calculation of the effectiveness of the introduction of innovations.

It should be noted, that a high level of ensuring the quality and safety of hospitality services should become the paradigm of all organizational decisions in the context of a pandemic. Objective restrictions and prohibitions may to extent limit the range of products and services, but the level of service or set of services must correspond to the declared level and be improved in accordance with the development strategy of the hotel and restaurant business enterprise.

It should be noted that a high level of ensuring the quality and safety of hospitality services should become the paradigm of all organizational decisions in the context of a pandemic. Objective restrictions and prohibitions can restrict the range of products and services, but the level of service or complex of services must correspond to the declared level and be improved in accordance with the development strategy of the hotel and restaurant business enterprise.

6. Conclusions

Based on the analysis of the theoretical and methodological principles and trends in the development of the hotel and restaurant business in Ukraine during the pandemic, summarized the practical recommendations and substantiated the measures aimed at overcoming the consequences of the crisis and improving the efficiency of the enterprises.

As the research results showed, in the period 2018-2019 years the hotel and restaurant sector in Ukraine developed quite dynamically, there was an increase in the main technical and economic indicators. However, the spread of the COVID-19 presented new challenges to the hotel and restaurant industry, which required the implementation of urgent measures in order to meet the priority needs of consumers in the context of the pandemic, preserve jobs and maintain market positions.

Thus, the analysis of the impact of the COVID-19 pandemic showed that the hotel and restaurant business needs to apply of complex innovative measures. In particular, we may be talking about the wider use of Internet technologies, online services to ensure address delivery of orders, etc.

At the same time, the practical aspects of the implementation of proposed measures require a further research in order to optimize the activities of enterprises in crisis conditions.

The results of our research will contribute to the improvement of the management system of hotel and restaurant business enterprises and increase their competitiveness on the domestic and international markets.

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