TENDENCIES IN THE DEVELOPMENT OF THE TOURISM INDUSTRY: THE CASE OF THE ODESSA REGION

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ABSTRACT
The main aspects of the tourism industry in the Odessa region, development trends, and features of the activity of specialised accommodation establishments are considered in this article. The main concentration of specialised accommodation establishments is located in the coastal part of the Odessa region. During the period 2011 to 2017, the number of establishments decreased by 40% (spa hotels and holiday centres with treatment), and the number of holiday centres decreased by 85%. The general trend in the health and medical complex is associated with a reduction in the network of institutions, which is associated with economic difficulties, the attraction of the necessary resources for the operational activities of enterprises, and a decline in the quality of services. Trends in the development of the hotel industry and potential opportunities for the development of the infrastructure in the southern part of the Odessa region are considered in the article. Promising areas of tourism development are medical tourism and rural tourism, in combination with gastronomic and wine tourism. One of the programmes that can be adopted to intensify regional development is the EU programme Support for Geographical Indications in Ukraine.
KEY WORDS: *hotel industry, Odessa region, health-resort industry.*

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Introduction

The hotel industry of any region specialising in tourism occupies an important place in the organisation of a range of recreational services for consumers. Although the Odessa region has a favourable Black Sea and border location, which is especially important for the development of trade and economic ties with different countries, the performance of the hotel industry in recent years has shown a decline in the industry, and in 2020 the industry was affected by Covid-19, which led to a decline in the market for tourism services all over the world. Systematic statistical observation of the business activity of the Odessa region is relevant in identifying general trends and opportunities for adjusting the further development of the hotel industry. As a centre of market infrastructure and business services, Odessa forms the core of business tourism in southern Ukraine. Thus, the region has good prospects for the development of both resort hotels and business hotels. An analysis of trends in the hotel industry in the Odessa region and its position among other regions of Ukraine makes it possible to predict the development of the industry and changes in the market for hotel services, and to find promising areas to stimulate the hotel industry in the Odessa region.

The development of health tourism and the sanatorium economy in the Odessa region has a long history. Since the middle of the 19th century, the coast around Odessa and the estuaries have been resort areas, and the creation of the Kuyalnik resort contributed to the active development of the sanatorium. The transformation of the sanatorium economy, which had an ‘elite’ phase before the collapse of the Russian Empire, the Soviet period of formation of the state management structure, and the financing and distribution of vouchers

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for sanatorium enterprises, affect the activities of institutions even since the collapse of the USSR and the transition to a market economy. The transition to market mechanisms, the reduction of financial support for institutions and the crisis in the sanatorium sphere have negatively affected the activities of enterprises, the related infrastructure, consumer needs, and their motivational aspects of recreation in sanatorium establishments.

Further changes in the structure to prevent negative trends in the spa sector require detailed research, with a focus on the economic and financial problems of institutions, opportunities to modernise the material and the technical base, planning the development of resorts and resorts, finding opportunities to enter regional markets in the European tourism market, operators in the field of medical tourism, the active development of public-private partnerships, and the attraction of investment with simultaneous state support to reduce the risks to investors of a political, economic and legal nature.

The scientific works by the following scientists are devoted to the study of the positioning of the Odessa region in the market of hotel service (Herasymenko, 2016; IV Davydenko, 2018; Pavlotsky, 2017; Shykina, 2018) et al.

Trends in the development of tourism in the Odessa region are related to the economic situation in the national economy of Ukraine, with the deteriorating foreign policy situation and economic problems after 2014: the falling national currency, and declining international tourists, including to the Odessa region (Koval et al., 2019). Since key regions of Ukraine have lost part of the tourist flow, it could be a possibility for the development of domestic tourism, especially during the tightening of restrictions in the case of the pandemic (Popova et al., 2020). Therefore, it is important to form a cluster policy and public-private partnership, the participation of local administrations in supporting small and medium-size businesses in the hotel industry.

Negative trends in outbound tourism and reduced occupancy of hotel enterprises in the Odessa region are a possibility for changing the management policy of institutions providing health and treatment services, as well as the position on the periphery of major tourist flows, responding to the declining tourist flow to the Odessa region (Nezdoyminov, Zakladna, 2016).

The main task of the article is to analyse the development trend in the tourism sector and elements of the infrastructure, which is a direct manifestation of changes in the regional development of the Odessa region.

The main issues in this article are:

- what are the trends in the tourist flow to the Odessa region;
- changes that have taken place in the resort area of the region;
- features of the dynamics of the hotel industry in the Odessa region;
- what directions of development in the tourist sphere of the Odessa region are considered by the regional administration.

The main methods in the study are comparative and content analysis. The object of the study is the hotel industry in the Odessa region, which is an important part of the regional tourism destination, and reflects the changes taking place in the tourism sector in the Odessa region.

1. The regional tourism market: features of the Odessa region

The long period of time for the Odessa region is characterised by the growth of outbound tourism, which is negatively reflected in the tourist balance. Figure 1 shows the trend in the multiple increase in the number of tourists going abroad. Among the regions of Ukraine, the Odessa region, although it occupies an important place in domestic tourism, tends to increase outbound tourism. The transport infrastructure, namely the active growth in the number of passengers at Odessa Airport, may in the future contribute to an influx of international tourists, especially from Eastern Europe (Poland, Latvia, etc). The prospects for this are associated with the arrival in the Odessa region of the low-cost airlines Ryanair and Wizz Air.

If the coastal part of the Odessa region and the city of Odessa are the most visited, the peripheral part of the northern and central part of the region remains low. Rural and ecological tourism, first of all oriented towards domestic tourism, are promising for this part of the Odessa region.

Trends in the development of tourism and tourist flows by region of Ukraine show that the Odessa region is one of the five regions with the highest share of tourists served by tourism entities (tour operators and travel agents), amounting to 72,302 people, after the Kyiv, Lviv, Ivano-Frankivsk and Dnipropetrovsk regions.

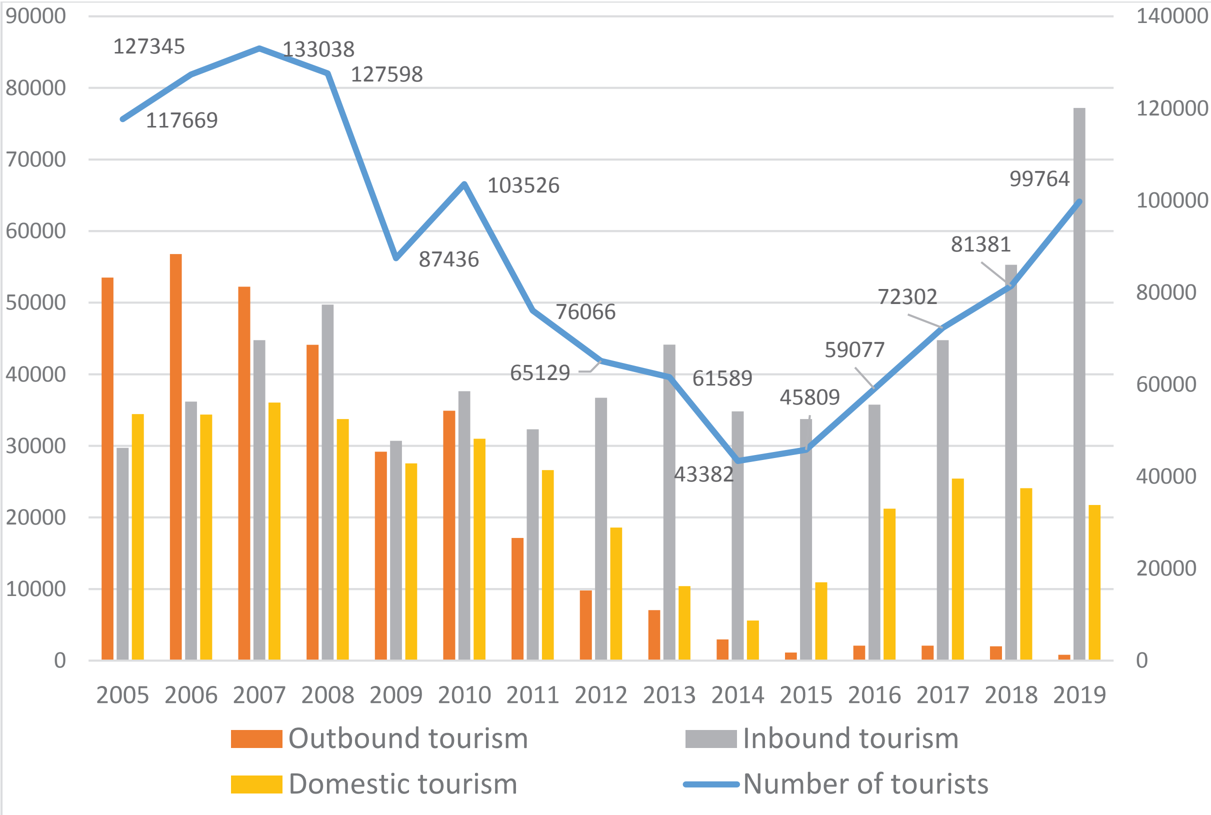

Figure 1. Indicator of the number of persons placed in collective accommodation in the Odessa region, 2005–2019 (number of tourists: right axis)

Source: Main Department of Statistics in the Odessa region.

According to tour operators, in Ukraine in 2020, because of the Covid-19 pandemic, the majority of Ukrainians used domestic tourism services, although in previous years outbound tourism prevailed. However, the position of the Odessa region on most indicators remains high, as the region is attractive to domestic tourists, and the interest of foreign tourists is growing.

2. The hospitality business in the Odessa region: tendencies and challenges

The health-resort complex in the region consists of three resort-recreational districts: Odessa, Belgorod-Dniester and Tatarbunary. The network of sanatoriums in the Odessa region has a general tendency to reduce in number (Figure 2). Thus, compared to 1990, the number of spa hotels and boarding houses with treatment decreased by almost 40% (43 institutions in 1990, 27 institutions in 2017), spa hotels by almost 85% (19 in 1990, three institutions in 2017), guest houses and boarding houses by 60% (15 establishments in 1990, six in 2017), etc.

These changes occurred due to the reduction of state funding for sanatoriums in the competitive market environment, reducing the financial power of the trade unions in the rehabilitation of workers, privatisation processes, problems in the self-financing reproduction of the resource and property potential of enterprises, welfare differentiation between different segments of the population and age groups, and the slowdown of the state's social guarantees for recovery in accordance with the existing needs of consumers (Humeniuk, 2013).

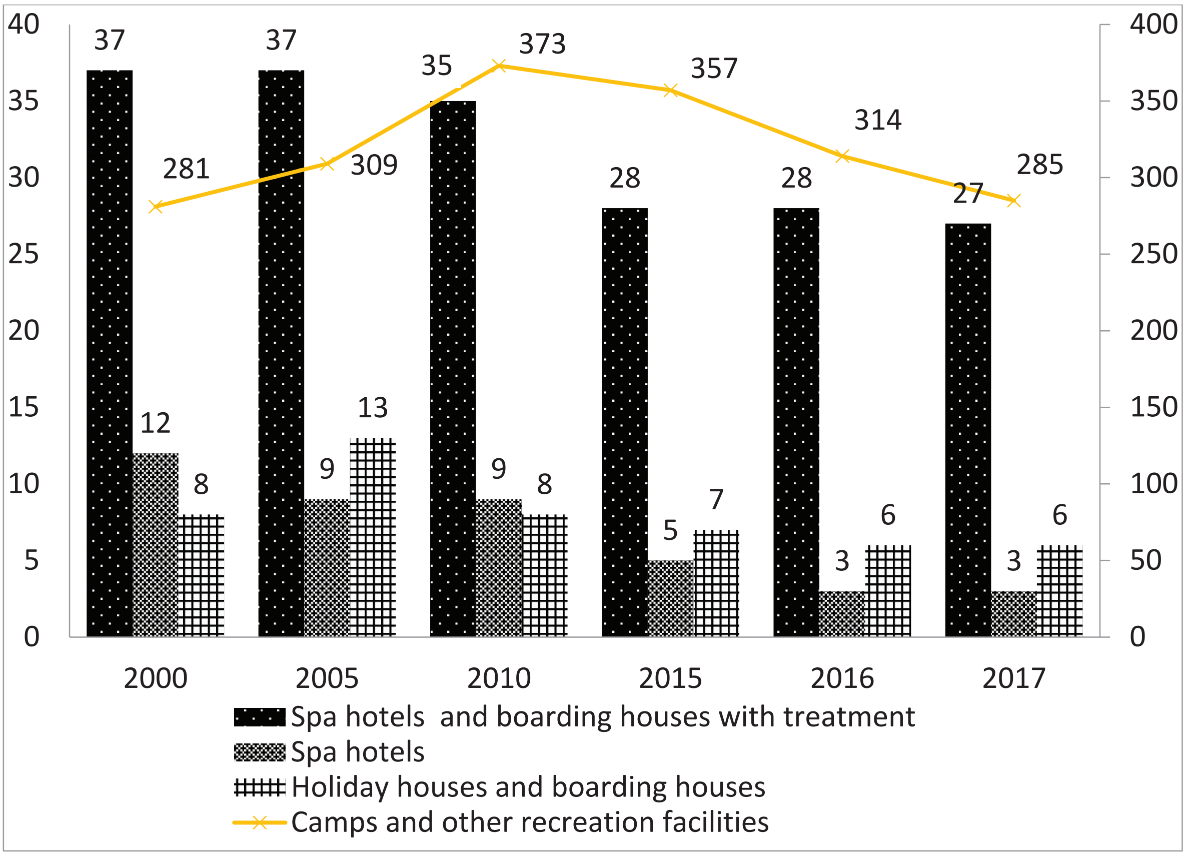

Figure 2. The number of accommodation establishments in the health-resort complex of the Odessa region

Source: State Statistical Service of Ukraine.

The reasons for the reduction in the network of spa and health hotels with treatment are also inefficient management, funding on a residual basis, and the transition from state to departmental management. During the period 2011 to 2017, the number of people placed in spa hotels decreased by 8,800 people, as did the average number of places (95.61% in 2017 compared to 2011).

An analysis of indicators for accommodation establishments in comparison with 2011 and 2017 revealed a reduction in the number of people served by health facilities in the region, with the exception of camps and other recreation facilities, where there was an increase of 114%. The most negative processes are observed in the service of foreign citizens. The absolute reduction is typical of sanatoriums and guest houses and boarding houses, which amounted to 17% and 5% in 2017 of the figure in 2011 (Table 1).

These negative indicators for the decrease in the number of consumers, including foreigners, are associated with the high cost of services and the loss of competitive advantages over other health tourism markets (primarily Romania, the Czech Republic, Hungary and Bulgaria).

Table 1. Indicators in the number of visitors served by health-resort hotels in the Odessa region in 2011 and 2017

Health-resort establishments	**Number of Ukrainian citizens, pers.**				**Number of foreign tourists, pers.**			
	2011	**2017**	**deviation**		**2011**	**2017**	**deviation**	
			absolute	**relative, %**			**absolute**	**relative, %**
Spa hotels and boarding with treatment	82913	74900	-8013	*90,34*	16391	8809	-7582	*53,74*
Spa hotels	16297	8379	-7918	*51,41*	1993	348	-1645	*17,46*
Holiday houses and boarding houses	15020	5711	-9309	*38,02*	4955	249	-4706	*5,02*
Camps and other recreational facilities	109905	125575	15670	*114,26*	21206	15098	-6108	*71,19*
Total	**224135**	**214565**	**-9570**	***95,73***	**44545**	**24504**	**-20041**	***55,0***

Source: State Statistical Service of Ukraine.

Most foreign consumers of sanatorium services came from Moldova, Belarus and Russia. The issue of attracting customers, primarily from EU countries, is related to the legal sphere and regulatory aspects. A number of legislative acts related to cross-border mobility in the field of health care have been enacted in EU countries (EU Regulation 883/2004 ‘On the coordination of actions for the introduction of the social protection system in national legislation’; Directive 2011/24 EU ‘On the application of patients’ rights in cross-border health care’). This directive enables consumers in one of the EU countries to receive health tourism services thanks to the harmonisation of legislative issues, services, safety and quality of service in any EU country.

For example, in Romania, in order to overcome the negative trends in the health tourism, a plan for the development of health tourism has been developed, which provides for the harmonisation of regulations, the improvement of medical facilities and staff training, and a cluster approach to resort development with active marketing support (Master Plan, Ministry of Tourism, 2014–2020).

The main income component of health-resort enterprises remains the sale of vouchers, the share of which increased in 2017, amounting to 83.85% of all services provided (in 2011 it was 80.76%) (Table 2).

Among the establishments in the health-resort sphere, spa hotels and boarding houses with treatment have the highest income from the rent of rooms (in 2011, 65.6% of all income, in 2017, 71.5%); for camps and other recreation facilities (in 2011, 57.3%, in 2017, 68.2%). Revenue from the sale of vouchers by establishments is distributed as follows: in 2011, spa hotels and boarding houses with treatment accounted for 72.4%, camps and other recreation facilities 18.04%, spa hotels 7.49%, holiday houses and boarding houses 2.02%. In 2017, the share of revenue from the sale of vouchers increased relative to spa hotels and boarding houses with treatment, amounting to 80.8%; and decreased relative to camps and other recreation facilities by 10.9%, sanatoriums 7.7%, holiday houses and boarding houses 0.5%.

The distribution of revenue from the provision of additional services in 2011 and 2017 is characterised by a decrease in the share of revenues by different types of institutions: spa hotels 71.7% in 2011, decreased to 50.3% in 2017; growth of the share of income among spa hotels 20.4% in 2011, and 30.7% in 2017; holiday homes and boarding houses 2.5% in 2011, and 8.6% in 2017; camps and other recreation facilities from 5.3% in 2011 to 10.4% in 2017.

The average capacity of health-resort establishments is 196.3 beds, with an average length of stay of 15 days (the opposite of hotels and similar accommodation, 2.6 days). The average cost of staying in spa hotels in 2017 was UAH 317.9 (in hotels and similar accommodation facilities, UAH 990.6), because of the longer stay and treatment procedures.

Table 2. The distribution of income of specialised accommodation facilities, Odessa region, 2011 and 2017, UAH m.

Specialised accommodation facilities	**Revenues from services**		**Including**					
			Income from the rent of rooms		**Income from the sale of vouchers**		**Income from the provision of additional services**	
	2011	**2017**	**2011**	**2017**	**2011**	**2017**	**2011**	**2017**
Spa hotels and boarding houses with treatment	193,72	334,35	4,24	4,22	172,64	316,8	16,8	13,32
Spa hotels	26,67	40,77	4,01	2,4	17,86	30,18	4,79	8,12
Holiday houses and boarding houses	11,34	13,15	5,9	8,6	4,8	2,18	0,58	2,28
Camps and other recreational facilities	79,15	163,1	19,09	33,6	43,01	42,73	1,2	2,75
Total	**295,1**	**467,3**	**33,2**	**48,9**	**238,36**	**391,9**	**23,48**	**26,49**
Share of revenue from services provided, %	100,00	100,0	11,28	10,5	80,76	83,85	7,95	5,67

Source: State Statistical Service of Ukraine.

Treatment and rehabilitation are an important aspect of the activities in specialised accommodation, using not only the climatic conditions, but also balneological resources and appropriate balneological equipment for the use of therapeutic mud and mineral water in the Odessa region. Maintenance and treatment procedures are provided by qualified personnel: doctors, paramedics, etc. In the Odessa region, for the last period, there is a reduction in the number of spa hotels with treatment, and a reduction in the average number of medical staff. The deterioration in the level of income of hotels with treatment services and rehabilitation leads to a reduction in both hotels and staff. For example, the number of doctors decreased by 23%, and nurses decreased by 290 people. The number of part-time lawyers decreased to 86% between 2011 and 2016, and the number of full-time employees in these institutions decreased by 2,673 in absolute terms, or almost 33%. This negatively affects the quality of services, and staff turnover is a consequence of economic and managerial problems in this sector of the hotel industry in the Odessa region (Table 3).

During the period 2010 to 2016, the average number of doctors decreased by 77.52% (100 people on average), and the average number of medical personnel by 75.17% (290 people). The other type of accommodation facilities are camps for children in specialised facilities of the resort economy.

Table 3. The average number of employees in specialised accommodation in the Odessa region, 2010–2016

Indicator	**Years**							**Deviation, 2016–2010**	
	2010	**2011**	**2012**	**2013**	**2014**	**2015**	**2016**	**Absolute**	**Relative, %**
Average number of doctors	445	410	392	416	391	332	345	-100	*77,52*
Average number of nurses	1168	1014	1070	1050	930	917	878	-290	*75,17*
Average number of part-time employees	no data	594	483	490	436	401	514	-80*	*86,53**
Average number of full-time employees	8129	6744	6851	6569	4287	5515	5456	-2673	*67,11*

* Deviation indicators are calculated relative to 2011.

Source: State Statistical Service of Ukraine.

During the period 2000 to 2018, there was a period of relative growth from 2000 to 2004, but in general there is a tendency to reduce the number of units and children served by accommodation establishments of the health-resort sphere (Table 4). If in 2000 accommodation facilities amounted to 42 units with a total of 406, in 2018 it was only 15 institutions, which is only 35% of the 2000 figure. The number of beds in specialised accommodation facilities for children amounted to 24,450 in 2000; in 2018 it was only 16,780 people, which is 68% of the 2000 figure.

Table 4. Dynamics of the number of specialised accommodation facilities for children in the Odessa region

Period	Accommodation		Number of accommodated children	
	units	% up to 2000	persons	% up to 2000
2000	42	100,00	24457	100,00
2002	51	121,43	35537	145,30
2004	49	116,67	37632	153,87
2006	47	111,90	32610	133,34
2008	46	109,52	33004	134,95
2011	35	83,33	21363	87,35
2013	52	123,81	37431	153,05
2014	44	104,76	30983	126,68
2015	22	52,38	13854	56,65
2016	25	59,52	19997	81,76
2017	21	50,00	16621	67,96
2018	15	35,71	16784	68,63

Source: Main Department of Statistics in the Odessa region.

Among the administrative units of the region, the largest number of specialised institutions is in Odessa (four establishments), Bilhorod-Dnistrovsky (seven establishments), and one accommodation facility each in the Berezivsky, Kiliysky, Ovidiopolsky and Tatarbunary districts.

In general, the health-resort facility indicators show a negative trend. Ukraine's resort industry development concept, approved in 2003, has not radically changed the situation. The problems identified, such as imperfect mechanisms of integrated development of resort areas, depreciation of fixed assets, lack of investment, low level of management and inefficient marketing, and low quality of service, remain relevant.

The general trends in the number of tourists who were accommodated in hotels of Odessa region are unstable. Thus, in certain periods (2014 and 2018) the number of persons placed was less than in the previous year (Figure 3).

In 2014, the decline in the occupancy of temporary accommodation facilities was due to instability in foreign policy (Russian aggression in the Autonomous Republic of Crimea and Donbas), the downturn in the economy, and the fall of the national currency and incomes. In 2018 and 2019, only institutions owned by legal entities and separate subdivisions of legal entities that own collective accommodation facilities were considered. Accordingly, the indicators are much lower: in 2017 there were 529 institutions in total, in 2018 there were 177 institutions, and in 2019 there were 187 institutions owned by legal entities.

Thus, the growth rate of hotel enterprises in the south of Ukraine is highest for the Odessa and Kherson regions (Table 5). For example, among hotel enterprises in Ukraine, the growth rate for the period 2011 to 2019 was in the range of 65% to 85% compared to 2011; while for the Odessa region it exceeded the figures of previous years, amounting to some years of growth of 112% to 115% compared to 2011; for the Kherson region it reached the level of 135% to 150% compared to 2011.

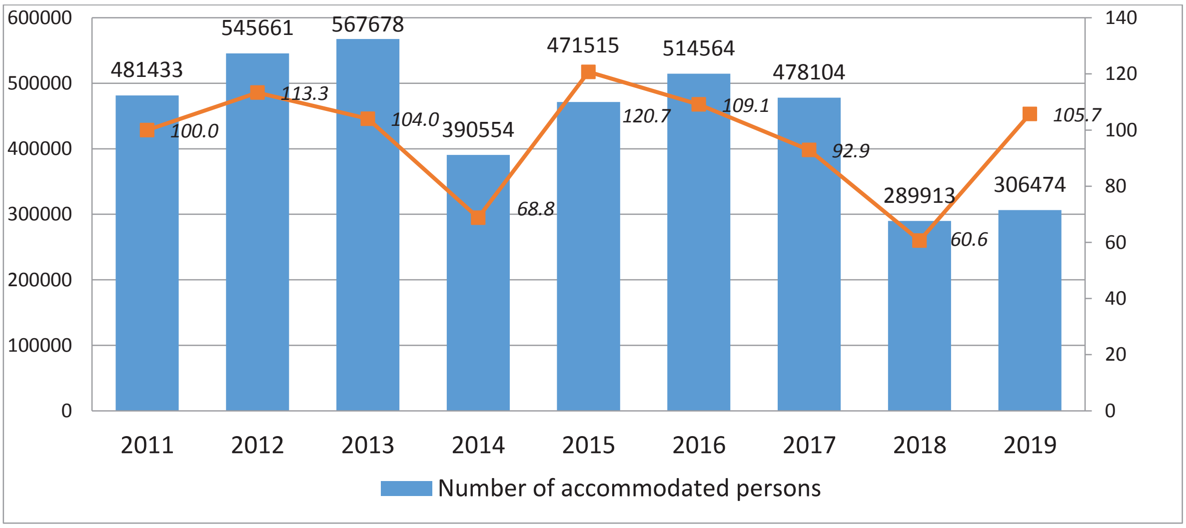

Figure 3. Number of people accommodated in hotel establishments in the Odessa region

Source: Main Department of Statistics in the Odessa region.

Table 5. Indices of growth rates of the number of hotels and similar accommodation facilities for 2011 and 2014–2019, south Ukraine (legal entities, in % by 2011)

Administrative units	2011	2014	2015	2016	2017	2018	2019
Ukraine	**100**	**86,74**	**81,55**	**78,27**	**75,08**	**63,02**	**63,26**
Odessa	100	103,85	115,38	112,82	102,56	85,90	92,31
Zaporizhia	100	117,95	97,44	82,05	87,18	38,46	43,59
Mykolaiv	100	94,12	73,53	82,35	67,65	64,71	64,71
Kherson	100	135,29	135,29	158,82	123,53	141,18	100,00

Source: State Statistical Service of Ukraine.

In terms of the number of visitors served by accommodation between 2017 and 2019, the Odessa region occupies fourth or fifth place, and the share of hotels and similar accommodation increased from 54.9% in 2017 to 69.4% in 2018, to 71.6% institutions in 2019 (Table 6).

The largest share in the number of people accommodated is in Kyiv, with 1,149,000 people, and the share of those accommodated in hotels and similar accommodation is high, at 93.8%. In the Lviv region, it was 517,000 people (96.9% of the total number of those accommodated in collective facility accommodation) in 2019. The Dnipropetrovsk region ranks third, with a low share of people accommodated in hotels and similar accommodation (48%): 377,000 people were accommodated in collective accommodation in 2019 (with 181,000 people in hotels and similar accommodation).

Table 6. The ranking of the Odessa region in the number of visitors served (legal entities), 2017 to 2019

Regions	2017				2018				2019			
	Number of persons	Hotels and similar accommodations	Share from total %	Place of rank	Number of persons	Hotels and similar accommodations	Share from total %	Place of rank	Number of persons	Hotels and similar accommodations	Share from total %	Place of rank
Kyiv city	1092	1059	96,9	1	1214	1156	95,2	1	1226	1149	93,8	1
Lviv	842	726	86,2	2	572	547	95,6	2	533	517	96,9	2
Dnipro-petrovsk	360	159	44,4	3	383	181	47,2	3	377	181	48,0	3
Kyiv	246	207	84,0	5	374	268	71,6	4	319	258	80,8	4
Odesa	341	187	54,9	4	289	201	69,4	5	306	219	71,6	5
Kharkiv	241	203	84,3	6	218	184	84,5	6	187	154	82,7	6
Zaporizhia	209	58	28,1	7	162	49	30,8	10	172	54	31,4	7
Ivano-Frankivsk	194	156	80,3	9	168	140	83,3	8	166	147	88,2	8
Poltava	203	142	70,3	8	164	153	93,3	9	162	151	93,1	9
Donetsk	79	28	35,7	16	215	61	28,7	7	131	60	45,8	10
Ukraine, total	**5108**	**3792**	**74,2**	–	**4826**	**3747**	**77,7**	–	**4604**	**3693**	**80,2**	–

Source: Author's calculation based on State Statistical Service of Ukraine information.

3. Strategical programme for the development of the tourism industry in the Odessa region

The development of tourism should be accompanied by government efforts to promote regional tourism programmes. Thus, the development of tourism in the Odessa region is determined by a programme document such as 'Strategy for the Economic and Social Development of the Odessa Region until 2022', as well as the 'Programme for the Development of Tourism and Resorts in the Odessa Region for 2021–2027', in which tourism and recreation are among the strategic priorities.

Thus, the programme provides the following main areas:

- an increase in the number of tourists to the Odesa region by 20.0%;
- an increase in the number of events related to event tourism by 15.0%;
- an increase in the number of new tourist and excursion routes by 25.0%;
- an increase in the number of institutions in the field of tourism in the Odessa region by 15.0% (Table 7).

Some of the indicators are much lower, which is due to external factors: socio-economic decline, political instability, the difficult epidemiological situation.

One of the directions of the development of the technical task ‘Development of Domestic Ukrainian Tourism’ includes:

- the involvement of state and regional authorities in supporting tourism and its promotion;
- the creation of local target programmes at the community level;
- providing an information base for the development and formation of local tourist destinations and the creation of tourism clusters.

Table 7. Planning funding for the development of the tourism sector in the Odessa region for the period 2021 to 2023, UAH m.

	2021	2022	2023	Total
State budget	800,0	800,0	800,0	2400,0
State Fund of Regional Development	800,0	800,0	800,0	2400,0
Other sources	–	–	–	–
Regional budgets, inc.	450,0	450,0	450,0	1350,0
Regional budget	300,0	300,0	300,0	900,0
District budget	150,0	150,0	150,0	450,0
Urban settlements budget	–	–	–	–
Other sources	–	–	–	–
Total	**1250,0**	**1250,0**	**1250,0**	**3750,0**

Source: Programme for the development of tourism and resorts in the Odessa region for 2021–2027.

The project envisages the gradual introduction and involvement of new areas for the development of local communities in the field of tourism and recreation. Another project related to the region’s infrastructure that can help attract foreign tourists is the restoration of air communication at Izmail Airport. In 2010, Izmail International Airport ceased operations due to the crisis. Izmail was the third in the region (after Odessa and Lymanske) with the status of an international airport. Today, Izmail International Airport is the most effective tool for increasing the investment and tourism attractiveness of the Bessarabia region and the Danube delta.

The following issues need to be addressed:

- the certification of the aerodrome with international status (recruitment of aircrew, repair of buildings and structures, purchase of appropriate equipment, location of a base of the State Border Guard Service of Ukraine);
- the reconstruction of the airport (it is necessary to equip the runway, build a new terminal, purchase ground equipment to serve passengers, and carry out fire safety measures);
- the development of the aviation and non-aviation infrastructure (involve business aviation, pilot school, aeroclubs, establish agreements with Ukrainian and foreign tour operators, create a logo and website, participate in tourism and aviation events).

The EU project ‘Support for the Development of Geographical Indications in Ukraine’ helps Ukraine to create an effective system of geographical indications in accordance with the Association Agreement between Ukraine and the European Union. The project cooperates with government agencies, manufacturers, business associations, consumer associations, tour operators and all other stakeholders with a desire to improve the system of geographical indications in Ukraine. The project provides:

- the improvement of legislation in Ukraine regulating the sphere of geographical indications and its harmonisation with EU norms;
- the advanced training of civil servants working with geographical indications;
- advising on the rebranding of goods that use EU geographical names;
- facilitating the registration of Ukrainian geographical indications;
- the development of wine/gastronomic tourism in regions where geographical indications are registered.

The project 'Support for the Development of Geographical Indications in Ukraine' involves several other regions in Ukraine in addition to Odessa: Transcarpathia, the Lviv region, Kyiv, etc. The general fund is 2.999 million euros. An important direction in the development of Southern Bessarabia is also the support of a regional producer. Within the framework of the mentioned programme of the geographical identification system, it is proposed to create a cluster of scientific and practical support for food producers, which is connected with the development of gastronomic tourism, rural tourism, etc.

Of course, the tourism industry in the Odessa region has a number of problematic issues that need to be addressed. To increase the efficiency of exploiting the tourist potential of the Odessa region, a comprehensive and professional approach is needed, both on the part of tourist enterprises and on the part of the state as a whole. Given the huge potential and financial support from the European Union, the Odessa tourist region has every chance to occupy a worthy place in the world market of tourist services. Negative trends in the field of sanatorium and resort management have been accumulating for a long time. The collapse of the USSR, the transition to market approaches in the work of enterprises, and being in a competitive environment in the regional market of Ukraine, did not have a drastic effect on changes in financial security or support for the modernisation of health-resort establishments.

Chronic underfunding and a loss of consumers of services leads to a deterioration of the infrastructure and lagging behind in the development of health tourism in regional markets in Europe. Detachment from marketing tools to promote the product of the resort economy deepens, on one hand, the economic problems in the operational activities of institutions, and on the other, the loss of potential commercial consumers who can be attracted through the network of tourism enterprises and provide income outside the state order for vouchers for social categories of citizens. The Odessa region occupies one of the most important places among the regions of Ukraine in the market for hotel services. The growing trends in the number of accommodation establishments against the background of declining growth rates in the number of enterprises is an argument for the active development of the hotel infrastructure and the growing number of hotel enterprises.

The change in tourist flows in recent years is associated with an increase in the number of visitors to the southern regions, especially the Kherson and Odessa regions. However, the statistical report on the length of stay in hotels and similar accommodation is somewhat surprising, suggesting that Odessa's hotels are mainly used for transit, or for business or educational purposes with a short stay. Another picture is observed for specialised accommodation, where there is a significant proportion of tourist camps and recreation centres, and the length of stay varies between seven and nine days. This segment of the hotel industry is developing most actively in the region. The region ranks third in the number of hotels with similar accommodation, but for 2017–2019 there has been a reduction (90% by 2017).

The capacity utilisation rate of hotels and similar accommodation facilities remains low, at 0.28, which is a very low indicator, and indicates problems with the occupancy of accommodation facilities, and the region occupies 12th to 14th places. Low congestion leads to low profits by institutions, and there are no effective mechanisms to reduce seasonal fluctuations. Some hotels and similar accommodation, especially in the coastal area, are reserved for the winter. This negatively affects the operational capabilities of institutions, reduces staff, and increases staff turnover.

Conclusions

There are several problems in the development of the hotel industry in the Odessa region, namely, the instability of the business environment, bureaucracy and corruption, the legal insecurity of entrepreneurs, and a lack of incentives for the voluntary categorisation of private hotel accommodation. Entrepreneurs have difficulty planning their business, even in the short term. There are no targeted state, regional or local programmes aimed at supporting, developing and protecting the hotel industry in the Odessa region.

The development of the tourism sector in the Odessa region requires the active implementation of programmes to support rural tourism and rural development, to support local producers and attract investment in the peripheral regions of the Odessa region, north and central, and to improve the infrastructure of the coastal recreation area, including the programme 'Roads, wine and taste of Bessarabia'.

In analysing the above, we offer the following recommendations: the creation of tourism programmes with real financial and organisational support of the tourism sector from regional government; the development of a cluster policy in the peripheral part of the Odessa region, increasing attention to support for small and medium-size businesses, especially in the hotel industry in rural areas, support for local producers, and the intensification of rural tourism. The decrease in the international tourist flow in the Odessa region is due to the weak positioning in the market of tourist services in the European region, as well as marketing communication and the promotion of the regional tourism product. In the case of the framework of the regional programme for the development of tourism, new tourist routes are offered. These proposals should be based on the intensification of the work of both the tourism business and the regional administration, as well as educational and research institutions to assist in the development and implementation of new routes. Thus, improving the situation of resort hotels with treatment and rehabilitation can be done by attracting investment in the modernisation of their infrastructure. There should also be year-round operation of resort clinics that can provide rehabilitation services in the low season. A significant reduction in staff is also associated with seasonality in the need for workers, which can be avoided by expanding services, and strengthening the effort to attract tourists from other regions of Ukraine, as well as international tourists.

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TURIZMO PLĖTROS TENDENCIJOS: ODESOS REGIONO ATVEJIS

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Santrauka

Straipsnyje nagrinėjami pagrindiniai Odesos regiono turizmo industrijos aspektai, plėtros tendencijos, specializuotų apgyvendinimo įstaigų veiklos ypatumai. Daugiausia šių įstaigų sutelkta Odesos regiono pajūrio dalyje. 2011–2017 m. SPA viešbučių ir poilsio centrų, teikiančių gydymo paslaugas, skaičius sumažėjo 40 %, atostogų centrų – 85 %. Bendra sveikatos ir medicinos komplekso gyvavimo tendencija siejama su įstaigų tinklo mažėjimu, kurį lėmė ekonominiai ir išteklių įmonių operatyvinei veiklai pritraukimo sunkumai, žemyn slenkantis paslaugų kokybės lygis. Odesos regione plėtojant viešbučių verslą kyla problemų dėl verslo aplinkos nestabilumo, vyraujančios biurokratijos ir korupcijos, teisinio verslininkų nesaugumo, nesuformuotos sistemos, privačias apgyvendinimo įstaigas priskiriant tam tikroms kategorijoms. Verslininkams sunku planuoti savo verslą net ir trumpuoju laikotarpiu. Odesos regione nevykdama jokių tikslinių programų valstybės ir regionų lygmenimis, kurios būtų skirtos remti, plėtoti ir apsaugoti viešbučių verslą.

Straipsnyje nagrinėjamos viešbučių verslo plėtros tendencijos, galimos infrastruktūros plėtros galimybės pietinėje Odesos regiono dalyje. Perspektyvios turizmo plėtros sritys yra medicininis, kaimo turizmas kartu su gastronominiu ir vyno turizmu. Viena iš regioninę plėtrą galinčių užtikrinti programų yra ES vykdoma programa „Parama geografinėms nuorodoms Ukrainoje“. Norint Odesos regione plėtoti turizmo sektorių, reikia aktyviai įgyvendinti programas, skirtas kaimo turizmui ir kaimo plėtrai remti, siekiant paremti vietos gamintojus ir pritraukti investicijų į periferinius Odesos regionus – šiaurę ir centrą, gerinti miesto infrastruktūrą, pakrantės poilsio zoną, organizuoti turistinius gastronominius maršrutus, kaip „Vyno kelias ir Besarabijos skonis“.

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