

Theoretical and methodological approach to the study of the process of change in the European Accommodation Industry

Mykola Rohoza*

<https://orcid.org/0000-0002-5654-7385>

Valentyna Stolyarchuk**

<https://orcid.org/0000-0001-6543-9020>

Abstract: This paper provides insight into current trends of the European Accommodation Industry development through gaining an understanding of processes in the previous period. Based on the result of data analysis of Eurostat online database, it is found out that the accommodation demand in the European Union was unstable during the last decade. The study result shows a trend of the European Accommodation Industry to decrease in the percentage change of nights spent at accommodation establishments by international visitors which has arisen before the impact of COVID-19. Domestic tourism has grown more steadily in the past few years, but it compensates for the current decrease in the international demand only partially. This study confirms that the change in the capacity of the European Accommodation Industry reflects the change in the accommodation demand. This paper results can be used to understand an establishment's position, identify the threats and opportunities in time of crisis, and to focus its resources on developing unique capabilities that could lead not only to restart activity but to competitive advantage

* Doctor of Economic Sciences, Professor of Poltava University of Economics and Trade, Poltava, Ukraine, Kovalia St, 3, Poltava, Poltava Oblast, Ukraina, 36000; Honored Worker of Science and Engineering of Ukraine; Academician of the Academy of Economic Sciences of Ukraine; Academician of the International Academy of Biotechnology.

** PhD in Technical Science, Associate Professor of the Hotel, Restaurant and Resort Business Department of Poltava University of Economics and Trade, Poltava, Ukraine, 36000.

and profitability. To facilitate its realisation by managers, the Process Landscape Model of the core processes and sub-processes of the European Accommodation Industry development has been elaborated.

Keywords: European Accommodation Industry; development in time of crisis; types of accommodation activities; tourist nights spent and capacity of accommodation establishments.

Introduction

A global tourism booming was recognised common across countries. According to the UNWTO's long-term forecast, an annual increase of international tourists had been expected.¹ Despite a strong start of the last year, the first half of it has been rated as the lowest in historical series.² An unprecedented tourism disruption has been caused by the COVID-19 pandemic which is continuing to reflect in travel restrictions in the world now.

The Accommodation Industry facilitates Tourism activity and is one of the most vigorous service subsectors.³ But, nowadays, both Tourism and Hospitality have been deeply affected by the coronavirus pandemic. The hoteliers accept a real challenge to provide activity in contemporary crisis conditions and many of them are indeed in dire straits.⁴ Nowadays, scientists and hoteliers are actively discussing

-
- 1 UNWTO, *World Tourism Barometer. Expert*, 2019 May, vol. 17, issue 2, http://tourlib.net/wto/UNWTO_Barometer_2019_02.pdf [accessed 31.05.2021]; UNWTO, *World Tourism Barometer. Expert*, 2019 November, vol. 17, issue 4, https://tourlib.net/wto/UNWTO_Barometer_2019_04.pdf [accessed 31.05.2021]; UNWTO, *World Tourism Barometer*, 2020 January, vol. 11, issue 1, https://tourlib.net/wto/UNWTO_Barometer_2020_01.pdf [accessed 31.05.2021]; OECD, *Organization for Economic Cooperation and Development Tourism Trends and Policies 2020*, OECD Publishing, Paris, <https://doi.org/10.1787/6b47b985-en>, p. 18 [accessed 31.05.2021].
 - 2 UNWTO, *World Tourism Barometer. Update*, 2020 July, vol. 18, issue 4, <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.4> [accessed 31.05.2021].
 - 3 Eurostat, *Tourism statistics – annual results for the accommodation sector*. Statistics Explained, <https://ec.europa.eu/eurostat/statistics-explained/pdfscache/37341.pdf> [accessed 31.05.2021]; R. McCune, *RAR acquisition positions Hostmark for future growth*, “Hotel News Now” 2020, <https://www.costar.com/article/1040529110> [accessed 31.05.2021].
 - 4 T. Baker, *COVID-19's impact on hotel deals, valuation*, “Hotel News Now” 2020, *Coronavirus: Hotel Pricing*, <http://hotelnewsnow.com/Articles/302580/COVID-19s-impact-on-hotel-deals-valuation> [accessed 31.05.2021]; STR, *COVID-19 webinar summary: 5 key points on Europe, 7 May*, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 7.05.2021]; STR, *COVID-19: Hotel Industry Impact. COVID-19 Data Reporting FAQs and Pipeline Project Status*, <https://str.com/data-insights-blog/>

this problem and they have different points of view. Some experts see the recovery by the second half of 2020.⁵ The other point out that “the situation will not clear up until 2021” and “the recovery will be long, and it will start locally”.⁶ The different factors indicate a set of problems just now and additionally, there will be more in the future. Thus, it is necessary to highlight the possibility of a restart and the next development opportunity of the Accommodation Industry.

1. Literature review

Despite a gradual and cautious restart of travel and tourism, the activity of accommodation establishments was much worse than expected, during the summer season 2020. According to the UNWTO,⁷ consumer demand has been impacted by several downside factors (in particular, travel restrictions and border shutdowns, the lack of reliable information, and a deteriorating economic environment, *etc.*).

The literature review result shows a set of a current difference of accommodation activities (in particular, between weekday and weekend business; between the hotel classes, *etc.*⁸). Nowadays allocation types (suburban, interstate, resort, and small metro/town) are recording stronger weekend demand. But the resort locations have the largest gap between weekday and weekend data.⁹ Additionally, STR highlights the class divide.¹⁰ Based on the data recorded for the spring-summer period in 2020, they point out that the lower accommodation class correlates to the higher occupancy. The smaller markets gained weekend occupancy, but it is still below the data recorded in 2019.¹¹

On the other hand, experts point out some changes in consumer behaviour. The UNWTO mention as such “trips closer to home or proximity travel, bookings

coronavirus-hotel-industry-data-news [accessed 31.05.2021]; STR, *Webinar Recording: COVID-19 impact on Europe hotel performance with a focus on DACH – 7 May*, <https://str.com/whitepaper/COVID-19-impact-on-DACH-hotel-performance-7-May> [accessed 31.05.2021].

5 UNWTO, *World Tourism Barometer. Update*, 2020 July, vol. 18, issue 4, <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.4>, p. 8 [accessed 31.05.2021].

6 T. Baker, *COVID-19's impact on hotel deals...*

7 UNWTO, *World Tourism Barometer. Update*, p. 7.

8 R. McCune, *RAR acquisition positions...*, pp. 2–3.

9 *Ibidem*, pp. 3–4.

10 STR, *U.K. performance results for August 10 through August 16*, <https://str.com/data-insights-blog/video-united-kingdom-performance-results-august-10-august-16>; STR, *COVID-19 webinar summary: 5 key points on Europe, 7 May*, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021].

11 R. McCune, *RAR acquisition positions...*, p. 4.

closer to the departure dates of the trip or a preference to travel by car".¹² The scientists point out that leisure travel is one of the possible factors that caused this "urban versus resort markets" trend.¹³ In the first quarter hotel company executives predicted that "markets with high drive-to-leisure demand would benefit first". The data show it proving now.¹⁴ According to Hotel News Now,¹⁵ hotels in urban markets or near airports location have been most negatively impacted by the pandemic for both weekdays and weekends. The STR also highlights that the gap between large cities and leisure markets was very sharp, for the period of the first half a year 2020.¹⁶ The large cities continue to be lag behind.

The current travel restrictions are also impacted by major outbound markets such as the United States and China, which are at standstill. Therefore, now in all regions, the promotion of domestic tourism is undertaking.¹⁷ According to the UNWTO, domestic tourism is expected to recover faster and some of the experts see this recovery by the second half of 2020.¹⁸ Additionally, it was recognised that despite the globalization process, the rate of domestic visitors was about 90% in some countries (in particular, in Romania and Germany).¹⁹ Nevertheless, the hoteliers concern that domestic visitors would "only partially compensate for the drop in international demand".²⁰ At the same time, according to the STR,²¹ the weekend performance is striking back at the US hotels across all classes. Moreover, in the US, weekend demand in the top 25 markets for the week of the end of June 2020 outperformed the same period in 2019.²²

It is necessary to highlight, that Tourism and Hospitality are banefully influenced all the time. For instance, before the COVID-19 pandemic, scientists and hoteliers were concerned about the impact on Tourism and Hospitality of the different factors such as seasonal changes, economic crises, political, terrorist acts, and other violent actions at both global and national levels.²³ According to

12 UNWTO, *World Tourism Barometer. Update*, p. 8.

13 R. McCune, *RAR acquisition positions...*, pp. 3–4.

14 D. Miller, *Why hoteliers are pinning hopes on drive-to leisure. Forecasts*, STR, "Hotel News Now" 2020, <https://www.hotelnewsnow.com/Articles/303291/Why-hoteliers-are-pinning-hopes-on-drive-to-leisure>, p. 1. STR, *COVID-19 webinar summary: 5 key points on Europe, 7 May*, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021].

15 R. McCune, *RAR acquisition positions...*, pp. 3–4.

16 STR, *U.K. performance results for August 10...*

17 UNWTO, *World Tourism Barometer. Update*, p. 8.

18 *Ibidem*.

19 OECD, *Organization for Economic Cooperation and Development...*

20 UNWTO, *World Tourism Barometer. Update*, p. 7.

21 R. McCune, *RAR acquisition positions...*, p. 1.

22 *Ibidem*, p. 2.

23 STR, *Tracking the impact of coronavirus on travel, hotels*, "Hotel News Now", <https://www.hotelnewsnow.com/Articles/300219/Tracking-the-impact-of-coronavirus-on-travel-hotels>. STR,

international organizations, Tourism and Hospitality were impacted by several global crises (in particular, 2001 and 2003, 2009).²⁴

Numerous papers have been published to explain the process of development of the accommodation industry in the previous period. The scientists concern that the different phases of tourism development are connected to the capacity of hotel, accommodations.²⁵ They see that the expansion of the hotel causes growth.²⁶ In particular, the hoteliers point out that the growth in the number of guests due to a boost in the number of establishments, rooms, and beds.²⁷ Thus, changes in the number of accommodation establishments and bed-places is a result of the lock-down caused by pandemic can lead to change in demand in the future.

Tourism and the Accommodation Industry have been changed, and will be changed in the future. Accommodation guests' demand is unstable. Moreover, the afore-mentioned results of literature review point out a set of cases that proved highly instability of visitors' demand in time of crises. Some scientists see these changes as a strength for hoteliers, the others as challenges or risks.²⁸ Therefore, changes in accommodation guests' demand should be taken into account by design of development strategy of the Accommodation Industry to achieve activity profitability, especially in the current crisis. Nevertheless, the result of literature review shows an ambiguity of hoteliers' activity. Moreover, they go out of business in current conditions. The one of the factors that causes this problem is a gap of branch knowledge in this tourism sub-sector, in particularly, a gap of thorough fundamental theory. An industry analysis is considered by scientists as a tool of solution afore-mentioned problem.

COVID-19 webinar summary: 5 key points on Europe, 7 May, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021]; UNWTO, *World Tourism Barometer May 2020. Special focus on the Impact of COVID-19 (Summary)*, [https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer - May 2020-Short.pdf](https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer_May_2020-Short.pdf); STR, *COVID-19 webinar summary: 5 key points on Europe, 7 May*, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021]; UNWTO, *World Tourism Barometer. Update*.

24 STR, *Tracking the impact of coronavirus...*

25 A. T. Attila, *The Impact of the Hotel Industry on the Competitiveness of Tourism Destinations in Hungary*, "Journal of Competitiveness" 2016, vol. 8 (4), pp. 85–104, <https://doi.org/10.7441/joc.2016.04.06>

26 P. Zawadzki, *The Influence of Modern Hotel Infrastructure on the Number of Hotel Guests and the Aspect of Physical Recreation in the Local Society*, "GeoJournal of Tourism and Geosites" 2014, vol. 14, no 2, pp. 215–225, http://gtg.webhost.uoradea.ro/PDF/GTG-2-2014/12_154_Zawadzki.pdf. STR, *COVID-19 webinar summary: 5 key points on Europe, 7 May*, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021].

27 *Ibidem*.

28 T. Baker, *COVID-19's impact on hotel deals...*; STR, *COVID-19 webinar summary: 5 key points...*; STR, *COVID-19: Hotel Industry Impact...*; STR, *Webinar Recording: COVID-19 impact...*

The purpose of this study is to identify changes in the development of the European Accommodation Industry through the gaining of an understanding of the development processes in the previous period (based on analysis of Percentage change of (non-) resident visitors, Percentage change of nights spent at tourist accommodation establishment, Percentage change of accommodation establishments and Percentage change of bed-places by accommodation activities types).

2. Data collection

The research is based on the data of the Eurostat online database and covers the European Union (28 countries, 2013–2020).²⁹ The data by all these countries are thoroughly recorded from 2008 to 2019. In the current century, Tourism and Hospitality was impacted by several crises (in particular, 2001 and 2003). But the Eurostat online database does not cover all indicators thoroughly for this period. For instance, there is not data of Nights spent at tourist accommodation establishments (NSaTAEs) of some accommodation types (in particular, by Holiday and other short-stay accommodation and Camping grounds, recreational vehicle parks, and trailer parks).³⁰ Other databases used different statistic record methodology. Thus, the research covers the period 2008-2019.

In this paper, three accommodation activity types are studied (according to NACE. Rev. 2 Section I – Accommodation and Food Service Activities. 55 Accommodation³¹):

- the 1st accommodation activity type (the 1st AAT) – hotels and similar accommodation (the activity classified by this type is provided at hotels, resort hotels, suite/apartment hotels, motels);

29 Eurostat, Nights spent at tourist accommodation establishments. Eurostat online database (online data code: tour_occ_ninat). Occupancy of tourist accommodation establishments (tour_occ). Annual data on tourism industries (tour_inda), http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_ninat&lang=en [accessed 31.05.2021]; Eurostat. Number of establishments, bedrooms and bed-places. Eurostat online database (online data code: tour_cap_nat). Annual data on tourism industries (tour_inda). Capacity of tourist accommodation establishments (tour_cap), http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_cap_nat&lang=en [accessed 31.05.2021].

30 Eurostat, Nights spent at tourist accommodation establishments...

31 European Communities, NACE Rev. 2 Statistical classification of economic activities in the European Community. General and regional statistics Collection: Methodologies and working papers, <http://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF> [accessed 31.05.2021].

- the 2nd accommodation activity type (the 2nd AAT) – holiday and other short-stay accommodation (the activity classified by this type is provided at children and other holiday homes, visitor flats and bungalows, cottages and cabins without housekeeping services, youth hostels, and mountain refuges);
- the 3rd accommodation activity type (the 3rd AAT) – camping grounds, recreational vehicle parks, and trailer parks (the activity classified by this type is provided as the provision of accommodation in campgrounds, trailer parks, recreational camps, fishing and hunting camps for short stay visitors; provision of space and facilities for recreational vehicles; accommodation provided by protective shelters or plain bivouac facilities for placing tents and/or sleeping bags).

Taking into account literature review results, the indicators of the accommodation industry were studied by two forms of tourism: international and domestic visitors.

3. Research result

3.1. Core processes of European Accommodation Industry development by nights spent at tourist accommodation establishments

The study data confirms the strong activity performance of accommodation establishments in the European Union (Fig. 1). Nevertheless, a percentage of nights spent at tourist accommodation establishments grows unsustainably in the period 2008–2009.

There is a little change in total nights spent at tourist accommodation establishments (+2.3%) in 2008 (on the previous year). However, demand grows positively. In the next year, this indicator decreases (–4.0%), due to the impact of the global crisis. But the results mixed change by different accommodation activity types. The percentage change of the nights spent at establishments of the 1st and the 2nd accommodation activity types are at the same rate as the total indicator. It contrasts with the percentage change of NSaTAEs at the 3rd AAT, with declining (–3.3%) in 2008 and fast growth (+5.7%) in 2009, respectively.

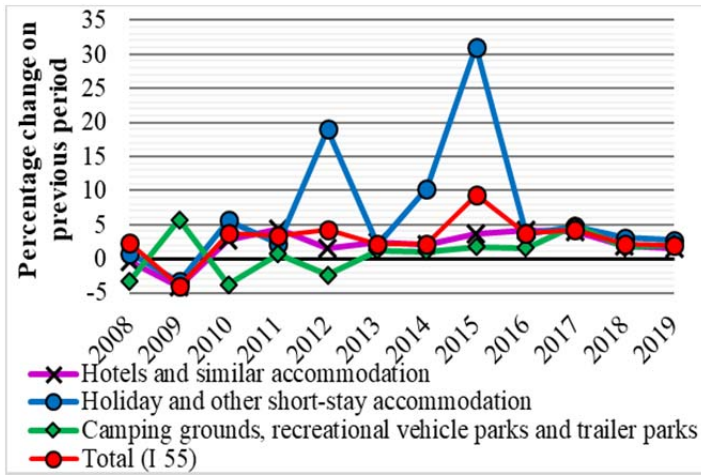


Figure 1. Percentage change of nights spent at tourist accommodation establishments by accommodation activity types, 2008–2019

Source: elaboration based on Eurostat online database (online data code: tour_occ_ninat).

The percentage changes of NSaTAEs by foreign and reporting country tourists are different in 2009 (Fig. 2–3). The result shows that the fast growth in NSaTAEs of the 3rd AAT (Fig. 1) is caused by domestic tourism (Fig. 3). It correlates with the current case, that is concerned above (in the literature review).

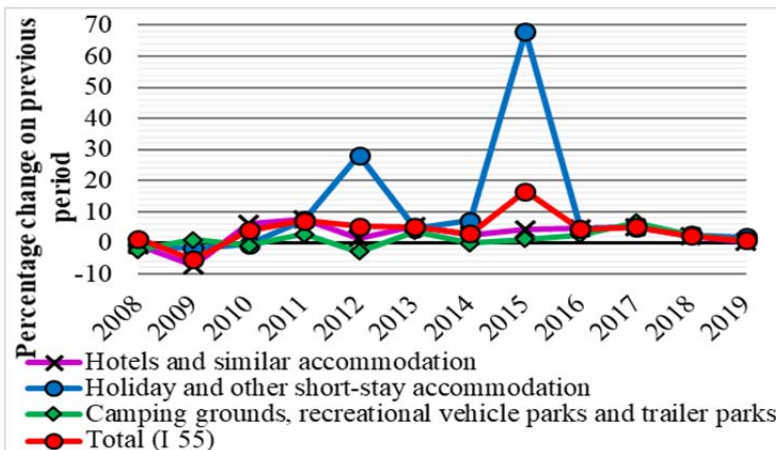


Figure 2. Percentage change of nights spent at accommodation establishments by foreign country tourists, 2008–2019

Source: elaboration based on Eurostat online database (online data code: tour_occ_ninat).

Figure 1 shows that Hospitality continued to enjoy positive results in the next period 2010–2019. But the percentage of total NSaTAEs grows unstably (on the previous year). However, the percentage of nights spent at establishments of the 1st AAT is the most permanent whether by total (Fig. 1), or international, or domestic tourism forms (Fig. 2–3).

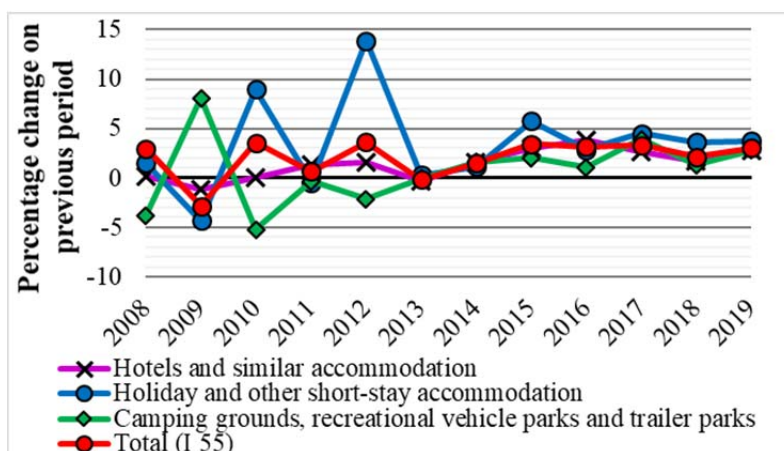


Figure 3. Percentage change of nights spent at accommodation establishments by reporting country tourists, on the previous period

Source: elaboration based on Eurostat online database (online data code: tour_occ_ninat).

On the contrary, the percentage change of NSaTAEs of the 2nd and the 3rd AAT are unsteady (on the previous year) (Fig. 1). And these changes are variable by both tourism forms (international and domestic) (Fig. 2–3). The indicators of these both types are more unsteady in the first period after the restriction in 2009 (2010–2015) than in the last four years (2016–2019). Nevertheless, since 2017, there is a decline in the percentage change of nights spent at tourist accommodation establishments in total and by accommodation activity types (Fig. 1) through a decrease in this indicator by foreign country tourists (Fig. 2). Although the NSaTAEs by domestic tourists is growing steadily (Fig. 3). Thus, the development trend of the European Accommodation Industry to decrease in the percentage change of nights spent at accommodation establishments by foreign country tourists arose before the impact of COVID-19 (since 2017). The pandemic conditions only additionally to reinforce and further strengthen it. Moreover, the analysis result of this data justifies hoteliers' concern pointed out in the literature review that domestic tourism compensates for a decrease in international demand only partially.

It is necessary to clarify the percentage change of the nights spent at accommodation establishments of the 2nd and the 3rd AAT in more details, in the period

2010–2015. The percentage of NSaTAEs of the 2nd is at the higher level than the percentage of total NSaTAEs (for all types of AAT) and, vice versa, the percentage of NSaTAEs of the 3rd AAT is at the lower level, respectively (Fig. 1–3). Additionally, there are some converse tops and gaps for both (in particular, in 2010 and 2012) (Fig. 1–3). Although, the total indicator is stable in this period (Fig. 1). There is a rapid growth in the total nights spent at the accommodation establishments (+9%) in 2015 (Fig. 1). The study shows that this result is associated with a significant increase in the percentage of the NSaTAEs at the 2nd AAT for both tourism forms (Fig. 1–3).

To summarize the result afore-cited analysis, a Process Landscape Model of the core processes of the European Accommodation Industry development (2008–2019) (the Model of EAID) has been elaborated (Fig. 4).

As presented in the Model of EAID, accommodation demand changes permanently. This process is not only due to the global crisis impacts. Additionally, there are several sub-processes that mostly effect changes in tourist spent nights by the accommodation activity types after the 2009 global crisis.

A methodological approach to the analysis of processes of change through the combined study of both quantitative and qualitative changes in the number of nights spent at tourist accommodation establishments is proposed and realised in the Model of EAID (Fig. 4). Additionally, it provides an opportunity to reveal both types of change periods (increase and decrease) that are confirmed by result of statistical data analyse. The research result shows contrary change in accommodation guests' demand in the next period after the global crisis in 2009 (Fig. 4). The NSaTAEs increases from 2010–2012 (quantitative change). At the same time, there is replace by accommodation activity types and by visitor forms (qualitative changes) that is presented by the Model of EAID. There are two retardation periods. There is a rapid increase in the NSaTAEs in 2015, that was caused by the foreign visitor spent nights at the establishments of the 2nd AAT. One of the factors that impacted on this case is the political and economic conditions in South-eastern Europe. The last retardation period is the longest (2016–2019) and reveals a decrease in the NSaTAEs by all types of accommodation activities by foreign visitors. Vice versa, the NSaTAEs by domestic visitors increases more steadily over the past few years. Therefore, there are factors that caused this retardation process before impact of COVID-19 pandemic.

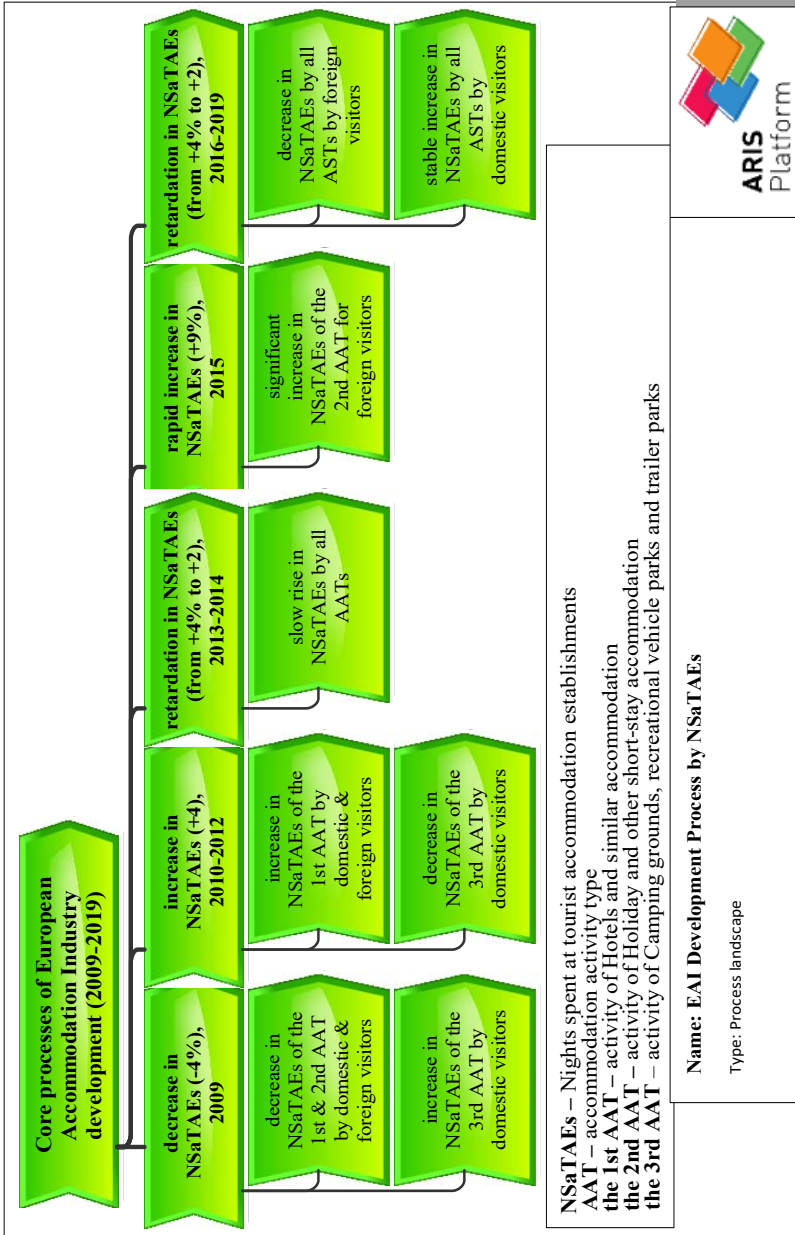


Figure 4. Process Landscape Model of European Accommodation Industry Development (the Model of EAI) by nights spent at tourist accommodation establishments
Source: author elaboration.

3.2. Change of capacity of the European Accommodation Industry

The development trends of the accommodation demand and the European Accommodation Industry capacity are various. The percentage of the accommodation establishments changes differently (Fig. 5), compared to the percentage of the nights spent at tourist accommodation establishments (Fig. 1). It needs to point out the rapid growth (+9) in the percentage of the accommodation establishments in 2009, especially, by the 2nd AAT (+15) (Fig. 5). The percentage of the bed-places increases too in 2009, but it is slower (Fig. 6). In the next year both indicators decline (Fig. 5–6), despite demand growth (Fig. 1).

Nevertheless, these both indicators significantly grow in 2012, through a boost by the 2nd accommodation activity type (Fig. 5–6). This case is similar to the case of the percentage increase in the nights spent at tourist accommodation establishments in 2012 (Fig. 1).

On the contrary, there is no any significant growth in the percentage of whether accommodation establishments (Fig. 5) or bed-places (Fig. 6) in 2015, despite the rapid increase of the tourist spent nights (Fig. 1). However, in the next period (2013–2017), the percentage of the accommodation establishments grows significantly (Fig. 5). On the other hand, the percentage of the bed-places increases lower than previous the indicator and in the later period (2015–2018) (Fig. 6).

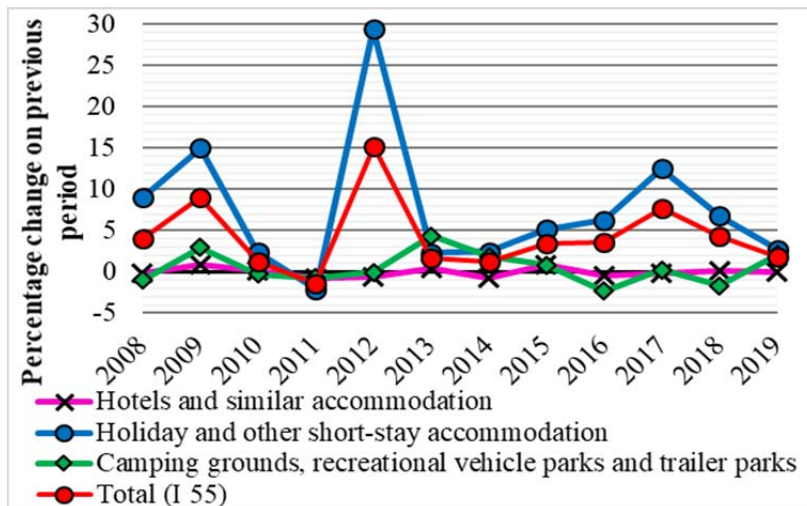


Figure 5. Percentage change of establishments in European Accommodation Industry by accommodation activity types, 2008–2019

Source: elaboration based on Eurostat online database (online data code: tour_cap_nat).

Since 2017, the percentage of the accommodation establishments declines (Fig. 5), as the percentage of the tourist spent nights (Fig. 1). At the same time, the percentage of bed-places in accommodation establishments changes insignificantly (Fig. 6). This result points out the change in the establishments' capacity.

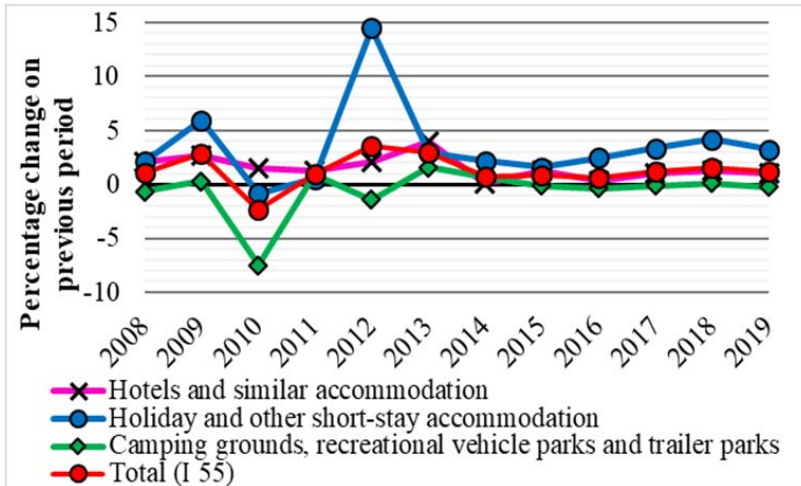


Figure 6. Percentage change of bed-places in accommodation establishments by accommodation activity types, 2008–2019

Source: elaboration based on Eurostat online database (online data code: tour_cap_nat).

Conclusion

Hospitality business is currently on lockdown, although a wide variety of measures are being taken worldwide in order to restart accommodation activities, in particular, to stimulate domestic tourists service. But the study result shows that the development trend of the European Accommodation Industry to decrease in the percentage change of nights spent at accommodation establishments by foreign country tourists arisen before the impact of COVID-19 (since 2017). The pandemic conditions only reinforce and strengthen it. Moreover, the data analysis result justifies hoteliers' concern that domestic tourism compensates for the decrease in international demand only partially.

The methodological approach to the analysis of processes of change through the combined study of both quantitative and qualitative changes in the number of nights spent at tourist accommodation establishments is proposed and realised

in the Process Landscape Model of the core processes of the European Accommodation Industry development. It provides an opportunity to reveal permanent changes of accommodation guests' demand. The study result points out two retardation periods after the 2009 global crisis. The last retardation period points out a decrease in percentage change of nights spent by foreign visitors at establishments by all types of accommodation activities. Therefore, there are factors that caused this process before COVID-19 which must be revealed and thoroughly studied. Moreover, these factors should be currently taken into account by elaboration of strategy of accommodation business restart to strength opportunity of establishments to effective activity restart. Currently hoteliers wait for better time, recovery of the previous conditions of activity and boom of tourists but research result points out that they should to apply new development strategies.

The study result confirms that the change in the capacity of the European Accommodation Industry reflects the change in guests' demand. The change in the number of tourists spent nights is reflected in the change in the number of accommodation establishments earlier and more significantly than in the change in the number of accommodation bed-places. This result points out a need to consider change in forms of tourism and visitors' preference for the accommodation activities types in strategy of the restart of accommodation business.

The study results can facilitate an accommodation establishment to understand its position, identify the threats and opportunities, and focus its resources on developing unique capabilities that could lead not only to restart activity in these crisis conditions but to competitive advantage and profitability.

References

- Attila A. T., *The Impact of the Hotel Industry on the Competitiveness of Tourism Destinations in Hungary*, "Journal of Competitiveness" 2016, vol. 8 (4), pp. 85–104, <https://doi.org/10.7441/joc.2016.04.06>
- Baker T., *COVID-19's impact on hotel deals, valuation*, "Hotel News Now" 2020, Coronavirus: Hotel Pricing, <http://hotelnewsnow.com/Articles/302580/COVID-19s-impact-on-hotel-deals-valuation> [accessed 31.05.2021].
- European Communities, NACE Rev. 2 Statistical classification of economic activities in the European Community. General and regional statistics Collection: Methodologies and working papers, <http://ec.europa.eu/eurostat/documents/3859598/5902521/KS-RA-07-015-EN.PDF> [accessed 31.05.2021].
- Eurostat, Nights spent at tourist accommodation establishments. Eurostat online database (online data code: tour_occ_ninat). Occupancy of tourist accommodation establishments (tour_occ). Annual data on tourism industries

- (tour_inda), http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_ninat&lang=en [accessed 31.05.2021].
- Eurostat, Number of establishments, bedrooms and bed-places. Eurostat online database (online data code: tour_cap_nat). Annual data on tourism industries (tour_inda). Capacity of tourist accommodation establishments (tour_cap), http://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_cap_nat&lang=en [accessed 31.05.2021].
- Eurostat, Tourism industries – economic analysis. Key economic indicators. Statistics Explained, https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Tourism_industries_-_economic_analysis#Key_economic_indicators [accessed 31.05.2021].
- Eurostat, Tourism statistics – annual results for the accommodation sector. Statistics Explained, <https://ec.europa.eu/eurostat/statistics-explained/pdfs-cache/37341.pdf> [accessed 31.05.2021].
- McCune R., *RAR acquisition positions Hostmark for future growth*, “Hotel News Now” 2020, <https://www.costar.com/article/1040529110> [accessed 31.05.2021].
- Miller D., *Why hoteliers are pinning hopes on drive-to leisure. Forecasts*, “STR. Hotel News Now” 2020, <https://www.hotelnewsnow.com/Articles/303291/Why-hoteliers-are-pinning-hopes-on-drive-to-leisure> [accessed 31.05.2021].
- Nicula V., Neagu R. E., *Evolution of Tourist Accommodation Structures in Romanian’s Developing Regions in the Context of New Challenges at European Level*, “Procedia Economics and Finance” 2013, vol. 6, pp. 542–549, [https://doi.org/10.1016/S2212-5671\(13\)00172-X](https://doi.org/10.1016/S2212-5671(13)00172-X) [accessed 31.05.2021].
- OECD, *Organization for Economic Cooperation and Development Tourism Trends and Policies 2020*, OECD Publishing, Paris, <https://doi.org/10.1787/6b47b985-en> [accessed 31.05.2021].
- STR, *COVID-19 webinar summary: 5 key points on Europe*, 7 May 2020, <https://str.com/data-insights-blog/covid-19-webinar-summary-5-key-points-europe-7-may> [accessed 31.05.2021].
- STR, *COVID-19: Hotel Industry Impact. COVID-19 Data Reporting FAQs and Pipeline Project Status*, <https://str.com/data-insights-blog/coronavirus-hotel-industry-data-news> [accessed 31.05.2021].
- STR, *Tracking the impact of coronavirus on travel, hotels*, “Hotel News Now” 2020, <https://www.hotelnewsnow.com/Articles/300219/Tracking-the-impact-of-coronavirus-on-travel-hotels> [accessed 31.05.2021].
- STR, *U.K. performance results for August 10 through August 16*, <https://str.com/data-insights-blog/video-united-kingdom-performance-results-august-10-august-16> [accessed 31.05.2021].
- STR, *Webinar Recording: COVID-19 impact on Europe hotel performance with a focus on DACH – 7 May*, <https://str.com/whitepaper/COVID-19-impact-on-DACH-hotel-performance-7-May> [accessed 31.05.2021].

- UNWTO, *World Tourism Barometer*, Expert, 2019 May, vol. 17, issue 2, http://tourlib.net/wto/UNWTO_Barometer_2019_02.pdf [accessed 31.05.2021].
- UNWTO, *World Tourism Barometer*, Expert, 2019 November, vol. 17, issue 4, https://tourlib.net/wto/UNWTO_Barometer_2019_04.pdf [accessed 31.05.2021].
- UNWTO, *World Tourism Barometer*, 2020 January, vol. 11, issue 1, https://tourlib.net/wto/UNWTO_Barometer_2020_01.pdf [accessed 31.05.2021].
- UNWTO, *World Tourism Barometer. Update*, 2020 July, vol. 18, issue 4, <https://www.e-unwto.org/doi/epdf/10.18111/wtobarometereng.2020.18.1.4> [accessed 31.05.2021].
- UNWTO, *World Tourism Barometer May 2020. Special focus on the Impact of COVID-19 (Summary)*, [https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer-May 2020-Short.pdf](https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer-May%2020-Short.pdf) [accessed 31.05.2021].
- Zawadzki P., *The Influence of Modern Hotel Infrastructure on the Number of Hotel Guests and the Aspect of Physical Recreation in the Local Society*, "GeoJournal of Tourism and Geosites" 2014, vol. 14, no 2, pp. 215–225, http://gtg.webhost.uoradea.ro/PDF/GTG-2-2014/12_154_Zawadzki.pdf [accessed 31.05.2021].