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Research Article

Mykola Rohoza, Valentyna Stolyarchuk*

Development Opportunities for the Accommodation Industry: Evidence from European Countries

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Abstract: This article focuses on the current trends in accommodation industry development in European countries through the study of satisfaction with tourists' increasing demand for accommodation. The total number of tourist nights spent at accommodation establishments continues to increase. Nevertheless, the growth of this indicator is significantly different across both regions and accommodation activity types. Moreover, the decrease in the number of tourist nights spent due to the impact of crises and destructive factors also varies. Based on the results of a data analysis of the Eurostat online database, we found that the number of beds at the accommodation establishments is not a key factor that determines the number of tourist nights spent. This finding represents the importance for the development strategy of considering not only the capacity of accommodation establishments, but also the variety of accommodation activity types. The data analysis of some countries' cases points out that even a less robust accommodation industry has opportunities to develop in a difficult and uncertain period. This study result has practical applications in an effective development strategy particularly in a time of crisis.

Keywords: accommodation industry; development in a time of crisis; types of accommodation activities; capacity of tourist accommodation establishments; nights spent at tourist accommodation establishments

***Corresponding author: Valentyna Stolyarchuk,** Associate Professor (Docent) for the Hotel, Restaurant and Resort Business Department, Poltava University of Economics and Trade, Poltava, Ukraine, ORCID: 0000-0001-6543-9020, Email: w_stol@yahoo.com
Mykola Rohoza, Doctor of Economic Sciences, Professor, Honoured Worker of Science and Engineering of Ukraine, Academician of the Academy of Economic Sciences of Ukraine, Academician of the International Academy of Biotechnology. ORCID: 0000-0002-5654-7385

1 Introduction

Tourism is recognised as the most important sector of the national economy in most developed and developing countries. According to the long-term forecast of the United Nations World Tourism Organization (UNWTO), an annual increase of international tourists had been expected (UNWTO, 2017b, 2019b, 2019c, 2020a). As a result of the exponential growth of international tourism arrivals, it is forecasted that the threshold of 1.8 billion will be exceeded in advance of 2030 (Organisation for Economic Cooperation and Development [OECD], 2020, p. 18). Nevertheless, scientists and hoteliers are now concerned about changes in the development trends in tourism and hospitality, due to the impact of different crises at both global and national levels (UNWTO, 2020b, 2020c, 2020d). Tourist demand is changing due to the impact of different factors such as implementation of new technologies, seasonal changes, economic crises, political unrest, terrorist acts, and other violent actions (Kapiki, 2012; UNWTO, 2020a, 2020b, 2020c, 2020d).

One of the most vigorous sectors of tourism is the accommodation industry (Attila, 2016; Eurostat Statistics Explained, 2019a, 2020c; Gheribi, 2018). Tourist preferences for types of accommodation services also change cardinally due to the impact of different factors (Ellis & Rossman, 2008; Sørensen, 2004; Stepaniuk, 2017; Zawadzkti, 2014). As a result, it affects the change of both accommodation activity types and the accommodation industry. Thus, it is necessary to understand the development opportunities in the accommodation industry, considering the changes in tourists' priorities for accommodation services due to the impact of different factors.

The aim of this research is to identify current trends in the development of the accommodation industry in the European region through the study of satisfaction with tourists' increasing demand for accommodations, taking into account the changes in both the capacity of the establishments and customer preferences for types of accommodation services (based on analysis of a number of accommodation beds and the number of nights spent at accommodation establishments by accommodation activity types).

2 Literature Review: Development of the Accommodation Industry as Tourism Sector

Some important trends in the development of tourism and hospitality have been identified as activity priorities in many publications of different international organisations: the UNWTO (2017a, 2017b, 2018a, 2018b, 2019a, 2019b, 2019c, 2020a, 2020b, 2020c, 2020d), Eurostat (Eurostat Statistics Explained, 2019a, 2019b; Eurostat, 2020a), the World Bank Group (World Bank, 2019a, 2019b), the OECD (2020), and others. A global tourism boom has been seen throughout most countries. Following six decades of consistent growth, tourism remains one of the world's most important economic sectors (OECD, 2020, p. 15). More than ever, it allows people to travel freely around the world. According to the UNWTO, international arrivals had grown for several years worldwide and reached 1.5 billion in 2019 (OECD, 2020, p. 15; UNWTO, 2020a). The increasing demand has had a significant impact on the development of both tourism and the accommodation industry as a sector.

At the same time, scientists note that globalisation processes have caused significant change in the tourism sector and subsectors at both the global and national levels (Berbel-Pineda & Ramírez-Hurtado, 2012; Carvalho, 2014; Peters & Frehse, 2005; Sørensen, 2004). A literature review shows an overall positive impact of globalisation on tourism and hospitality, but there are also several negative effects. Scientists pointed out that long-term tourism growth forecasts had been performed until 2020 (OECD, 2020). At the same time, they were concerned about the mixed picture for tourism growth forecasts in the short term (OECD, 2020, p. 15). For instance, the outlook of the UNWTO for 2020 was positive but cautious due to trade, social, and geopolitical tensions (UNWTO, 2020a, p. 4). The UNWTO (2020a) highlighted that 'external shocks happening in specific countries may lead to a redistribution of travel to other destinations' (p. 4). According to the OECD (2020), the problems are 'mainly due to an uncertain economic outlook and external shocks such as health scare and extreme weather events' (p. 15). It would therefore be beneficial to learn more about these changes.

Over several years, the problem of lost demand has been highlighted, based on the analysis of year-to-year changes in tourism and hospitality. International organisations (UNWTO, 2020d; World Bank, 2020) have documented travel restrictions due to the September 11th attacks in 2001, the SARS outbreak in 2003, and the 2009 global economic crisis. Some observers are concerned about a need to increase the security of tourists due to several terrorist attacks worldwide, as well as kidnappings, robberies, and assaults (Kapiki, 2012). According to the UNWTO (2020a) although 2019 was another year of strong growth, it was slower compared to the exceptional rates of the previous years. They pointed to lower demand, mainly in advanced economies, and particularly in Europe, due to 'uncertainty surrounding Brexit, geopolitical and trade tensions, and the global economic slowdown' (UNWTO, 2020a). The UNWTO also highlighted that 2019 was a year of major shifts in the sector caused by the collapse of Thomas Cook and of several low-cost airlines in Europe (UNWTO, 2020a).

According to the UNWTO (2020a), the near-complete lockdown imposed in response to the COVID-19 pandemic led to a 98% decrease in international tourist numbers in May 2020, when compared to May 2019. Currently, this problem is widely discussed in the academic literature, as scientists have differing points of view. According to Kellett, it 'would take stress six or 12 months to come through' (Baker, 2020b). Schäfer-Suren underlines that 'the situation will not become clear until 2021,' and 'recovery will be long, and it will start locally' (Baker, 2020b). According to Schäfer-Suren, 'prices will go up and down' (Baker, 2020a). Hildwein and Invesco's Kellett stress that 'solutions have to be found' (Baker, 2020b). At the same time, different factors indicate a set of problems in the future. One of them is ambiguity.

The world has changed and will continue to change in the future. Some scientists and hoteliers see that as a strength, others as a challenge or risk (Baker, 2020a, 2020b; McCune, 2020; STR, 2020b, 2020c, 2020d, 2020e). Scientists underline also that 'in the background of all these deals will be the fundamental changes to travel and tourism patterns' (Baker, 2020a). According to Kellett, 'we will learn a lot from the crisis' (Baker, 2020b). According to J. Cataldo, 'the pandemic and its impact on the industry will require some shifting of strategy' (McCune, 2020). Accommodation establishments therefore face a new challenge due to external and internal factors in the business environment that affect activity performance. Scientists see adaptability and the ability to manage change as essential elements to success. Researchers conclude that industry analysis is a tool that helps an establishment to understand its position, identify threats and opportunities, and focus its resources on developing unique capabilities that could lead to competitive advantage and profitability in these crisis conditions. To find a solution for this difficult problem, managers should pay attention to the opportunities presented during a challenging climate in a time of crisis.

Despite the previously mentioned lockdowns, the long-term forecast shows that the globalisation process influences on both tourism and hospitality are favourable and far-reaching. Sørensen (2004) concluded that the globalisation process affects both the enterprise's activities and tourist behaviour, to cause new consumer demand, and to provide new opportunities for tourism product innovation. Kapiki (2012) highlighted that the degree of consumer satisfaction and realisation of expectations are becoming the most important differentiating factors in the hospitality environment. Kapiki (2012) pointed out that guest satisfaction has clear linkages to financial outcomes: 'all hoteliers know that in order to survive they need to attract and retain guests'. At the same time, the scientist highlights that 'hoteliers also need to know specifically what it takes to satisfy their guests' (Kapiki, 2012). Thus, considerable services are supplied, but only a few hoteliers offer exceptional service.

At the same time, contemporary tourists are becoming increasingly sensitive to environmental and social issues and are giving preference to those accommodation establishments that promote eco-friendliness. As a result, a growing number of establishments are increasing their eco-friendly activities. For this reason, sustainability is one of the most noticeable trends in the tourism and hospitality industry. In this context, the United Nations (UN) 70th General Assembly designated 2017 as the International Year of Sustainable Tourism for Development, which caused a unique opportunity to raise awareness of the contribution of sustainable tourism to development, and mobilised all stakeholders to work together in making tourism a catalyst for positive change (UN, 2015; UNWTO, 2017a). International organisations now promote and support changes in policies, business practices, and consumer behaviour in moving toward a more sustainable tourism sector.

Recently, scientists have begun to focus on sustainability in conjunction with digitalisation and new technologies (European Tourism Forum, 2019, p. 3; OECD, 2020, p. 18). The push to digitalisation is 'driven by the convergence of advanced technologies and the increasing social and economic connectivity unfolding under globalisation' (OECD, 2020, p. 46). The European Commission (European Tourism Forum, 2019, p. 3) concluded that digitalisation is one of 'the megatrends', and is a strong catalyst for innovation and growth in tourism and hospitality. According to the OECD (2020), 'facilitating and enabling digitalisation in tourism is, therefore, a key policy challenge' (p. 46). As a result, technology and data-driven management are transforming social and economic systems. An inevitable change in the European economy and society through new technologies was recognised by the European Tourism Forum (2019, p. 3). European tourism can thus become more competitive and sustainable through new digital technologies. Scientists highlight that 'the use of data will grow in a revolutionarily rapid manner and the tourism sector should actively search for ways to benefit of the use of new technologies' (European Tourism Forum, 2019, p. 3). The accommodation industry actively adopts technologies from other sectors, in particular, virtual reality hotels, intelligent hotels, robots, digital room keys, and so on. Interactions in a virtual environment increase through the use of new technologies for planning itineraries, booking travel, and reserving accommodations. Any resident of the world can be a potential visitor using these services (Kapiki, 2012). Digital technology helps to resolve the issue of the restriction of customers' options in the accommodation industry across territorial boundaries.

The European Tourism Forum (2019, p. 3) recognised that technological development suggests more power and tools but it does not displace a human being in tourism and hospitality. The digital technology adapted at accommodation establishments improves communication among managers, employees, departments, and guests. New technologies allow hotel management to improve and to use the accommodations infrastructure more efficiently (European Tourism Forum, 2019, p. 4). Now hoteliers can control a variety of aspects of the guests' accommodation cycle and guests' experience more carefully and completely. This digital technology has been quickly adopted by the tourism and hospitality industry, in this way, setting a course for change in development trends. The OECD (2020) Tourism Committee highlighted 'the important role of government in creating the right framework conditions for the digital transformation of tourism business' and in the identification of 'a number of key policy considerations to foster digital technology uptake' (p. 50). At this time, scientists are concerned with the impact of modern technology on tourism transformation and what changes are expected in the future.

On the other hand, according to the European Tourism Forum (2019) 'the deployment of advanced technologies has reinvented the way to consume tourism experiences' (p. 3). The advanced software and communication tools allow delivery of improved customer services (in particular, better, faster, and cheaper). In addition, these technologies make it possible to improve the customer experience, meeting their needs quickly (in particular, new check-in and check-out services, etc.). Thus, new technologies change not only accommodation activity, but customer service provision. As a result, new hospitality services and new guest experiences are built. Modern tourists are therefore seeking something new and often request personalised, unique, extreme experiences. According to Khan et al. (2018), it is necessary to increase the level of delivered service 'that is tailored to the consumer expectations and needs'. Peters and Frehse (2005) summed up that it is necessary to develop the customer-oriented European hotel market. Thus, scientists (Ellis & Rossman, 2008; Sørensen, 2004; Stepaniuk, 2017) consider the importance of taking into account how the tourism product affects the visitor experience. Sørensen (2004) pointed out the limited study of this problem due to several factors. The research studies generally were 'typically focused on estimating the importance of tourism in terms of financial and employment benefits' and 'ignored the existence of a tourism experience' (Sørensen, 2004). Sørensen (2004) highlighted that it is important to consider the 'tourist experience', its impact on the changes in tourist demand, and tourist preferences.

The greater part of research on accommodation industry development is based on statistical information about economic indicators. The statistical data of the accommodation sector of tourism are recorded on a different level. In many publications, there are a lot of detailed explanations. The international organisations (Eurostat, UNWTO, STR, etc.) collect statistical data on the activities of tourist accommodation establishments systematically. They cover statistical data of the accommodation sector of tourism, analyse the data, and discuss the development trends of the accommodation industry in the numerous publications on their official websites. Such research relates generally to types of economic activities, finance, and employment.

Different international organisations provide analyses of the development of the accommodation industry as part of the tourism sector through global indexes and national indexes by cross-country comparison. For instance, the World Bank (2020) analysed the economic impact of tourism subsectors mainly by international tourists (in particular, the number of departures, receipts, expenditures for passenger transport items, etc.). Thus, they primarily focus on international tourism and do not analyse the accommodation industry carefully.

The World Economic Forum (2019a, 2019b) published a Travel & Tourism Competitiveness Index, which included a variety of indicators that capture the general conditions necessary for operating in a country (business environment, safety and security, health and hygiene, human resources and labour market, etc.), the specific policies or strategic aspects (environmental sustainability, price competitiveness, international openness, etc.), and the principal 'reasons to travel' (World Economic Forum, 2019a, 2019b). The Travel & Tourism Competitiveness Index includes an infrastructure subindex, which captures the availability and quality of physical infrastructure. In reports (World Economic Forum, 2019b), a significant competitive advantage for a country and the sustainable development of the travel and tourism sector is represented through the availability of sufficient quality accommodation resorts and entertainment facilities. The level of tourism service infrastructure is measured by 'the number of hotel rooms complemented by the extent of access to services such as car rentals and ATMs' (World Economic Forum, 2019a). They do not cover the type of accommodation thoroughly, however. They barely consider the number of beds in a room, luxury or modest type of accommodation services, a variety of secondary services, and so on. Therefore, they do not consider customer experiences thoroughly.

A few international organisations have analysed activity in the accommodation industry at the global and national levels, but the analyses are not comprehensive according to current development trends. The UNWTO (2020a, 2020b, 2020c, 2020d) aims to provide all those directly or indirectly involved in tourism with adequate, up-to-date statistics and analyses in a timely fashion. They show short- and long-term tourism development trends and show the results in the UNWTO World Tourism Barometer (UNWTO, 2019b, 2019c, 2020a, 2020b, 2020c, 2020d). Mostly, the UNWTO monitors information about the number of tourist arrivals globally, by region and subregion, annually and monthly, and tourist expenditures. They also analyse the economic impact of tourism (in particular, tourism's contribution to gross domestic product, employment, etc.). The UNWTO examines the accommodation sector based on the available data on capacity, but focuses mostly on the nights spent by guests in all accommodation establishments by destination, by main means of accommodation, and so on.

Eurostat is the statistical office of the European Union, which provides high-quality statistics and data on Europe (Eurostat, 2020a; Eurostat Statistics Explained, 2020c). They show a wide variety of data for tourism and hospitality. Mostly, Eurostat analyses current year indicators compared with the preceding year, primarily the number of nights spent by the guest (separated residents and nonresidents), by type of locality of the accommodation establishment, and so on. They analyse some indicators (in particular, the capacity of tourist accommodation establishments by NACE, an average occupancy rate of beds in hotels, number of persons employed by enterprise size class, etc.), whether in a single year (e.g., 2018) or a single month (Eurostat, 2020d). Eurostat also focuses on the short-term trends in the nights spent in tourist accommodations in the European Union (Eurostat, 2020b). They provide analysis of the data for the most recent reference month available (e.g., December 2019), compared with the same month of the previous year (Eurostat, 2020b). The Eurostat online database shows data on the occupancy of the tourist accommodation establishment (number of nights spent), the purpose of each trip (recreation, business, etc.), the type of destination (urban, rural tourism, etc.), the sociodemographic characteristics of tourists (age groups or gender groups, purposes by educational attainment level, etc.), and the types of activities (Eurostat, 2020a; Eurostat Statistics Explained, 2019b, 2020c). In addition, the Eurostat online database displays statistical data on the capacity of the tourist accommodation establishments, in particular, the number of establishments, rooms, and beds by region, urbanisation level, and so on (Eurostat, 2020a). However, the contemporary statistical data and scientific publications, which reflect their analysis, do not explain how the current distribution of number of beds (the capacity of accommodation establishments) by the accommodation types is related to the distribution of tourist demand, how tourist preferences for certain types of accommodation services are changing, and how these factors influence the development of the accommodation industry. The most recent Eurostat publication focuses on the development of the tourist accommodation sector in the European Union over the period from 2005 to 2018 (Eurostat Statistics Explained, 2019b). Thus, they do not cover current lockdowns in sectors and other restrictions brought about by the aforementioned crises and changes in the sector.

STR provides data benchmarking, analytics, and marketplace insights for global hospitality sectors to help hoteliers improve strategies and be more competitive (STR, 2020a). They show a wide variety of data on activity in the sector and reflect the current period. However, they focus on statistics and do not analyse the development of tourism and hospitality thoroughly due to the impact of the aforementioned factors.

Numerous study results have been published to clarify the process of development of the accommodation industry (Eurostat, 2020b; Eurostat Statistics Explained, 2020a; Gheribi, 2018; Nicula & Neagu, 2013; STR, 2020b, 2020c, 2020d; UNWTO, 2018a, 2018b, 2019a, 2019b, 2019c, 2020a, 2020b, 2020c, 2020d; World Economic Forum, 2019a; Zawadzkti, 2014). Some of these results point out that the phases of tourism development are affected by changes in accommodation capacity (Attila, 2016). According to Zawadzkti (2014, p. 222), ‘the expansion of the hotel base’ is ‘the reason for the growth’. The author presented that ‘the increase in the number of hotels led to a systematic increase in the numbers of rooms and beds, which ultimately contributed to the number of guests’. Therefore, ‘an increasing number of hotels with a growing base of accommodation facilities allowed to take more tourists’ (Zawadzkti, 2014, p. 221). Nevertheless, Zawadzkti indicated that the attractiveness of hotels is important, too (specifically recreational infrastructure, a wide range of additional services), because visitors prefer to spend their time actively.

Thus, scientists highlight that services should be supplied in accordance with a tourist’s needs and expectations. The literature review shows, however, that international organisations, which provide statistics and analysis of the establishment activity in tourism and hospitality, do not accept it overall. One of the key conclusions of the European Tourism Forum (2019) is ‘data management and access to data are crucial for evidence-based policymaking’ (p. 5). They recognise a ‘lack of competence to make data analysis, funding and reaching the customers’ (p. 5). Scientists highlight that the increase of customer satisfaction is afforded through data understanding of the needs, plans, and preferences of customers (European Tourism Forum, 2019, p. 4). Nevertheless, hoteliers treat accommodation as an important tourism infrastructure that facilitates visitor demand but does not drive destination demand. They accept that tourism demand thoroughly depends on events and greater marketing of the destination’s offering. According to the European Commission (European Tourism Forum, 2019), ‘tourism policy measures and regulations need re-thinking’ (p. 3). They pointed out the importance to ‘recognize what works and shape the policy and measures according to it’ (p. 3). The literature review shows a crucial shift in tourist needs and preferences in the current time of crisis. There is not enough crucial information, however, to understand how tourists perceive accommodation varieties and how changing supplied accommodation types affects the development of the accommodation industry. Further, there is less information that illuminates this problem, taking into account the impact of different factors. This knowledge is essential for both scientists and hoteliers, due to the support required in developing policies, planning strategies, making decisions, and taking actions that can contribute to the effective development of tourism and hospitality.

3 Material and Methodology of Research

3.1 Theoretical framework

The literature review results on the contemporary aspects of tourism and hospitality development have served to establish an understanding of the need for a versatile study of the accommodation industry, through both economic performance and the changes in consumer preferences for services. Thus, in this article, the study of accommodation industry development is based on both the number of tourist nights spent and the capacity of establishments by accommodation types. The aim of the study is to contribute to a better understanding of how customers' needs and expectations are supplied with appropriate accommodation service types. The theoretical framework of this study is shown in the data model of accommodation industry development in the European area (Figure 1). This model has been elaborated to thoroughly summarise the variable information, which is covered in the literature review, and provide its correct synthesis (Figure 1).

The model is built using business modelling tools from the ARIS Platform (ARIS Community, 2020). It describes the method of implementation of the aim of this study and covers the results of the literature review. The central entity of the model is accommodation activi-

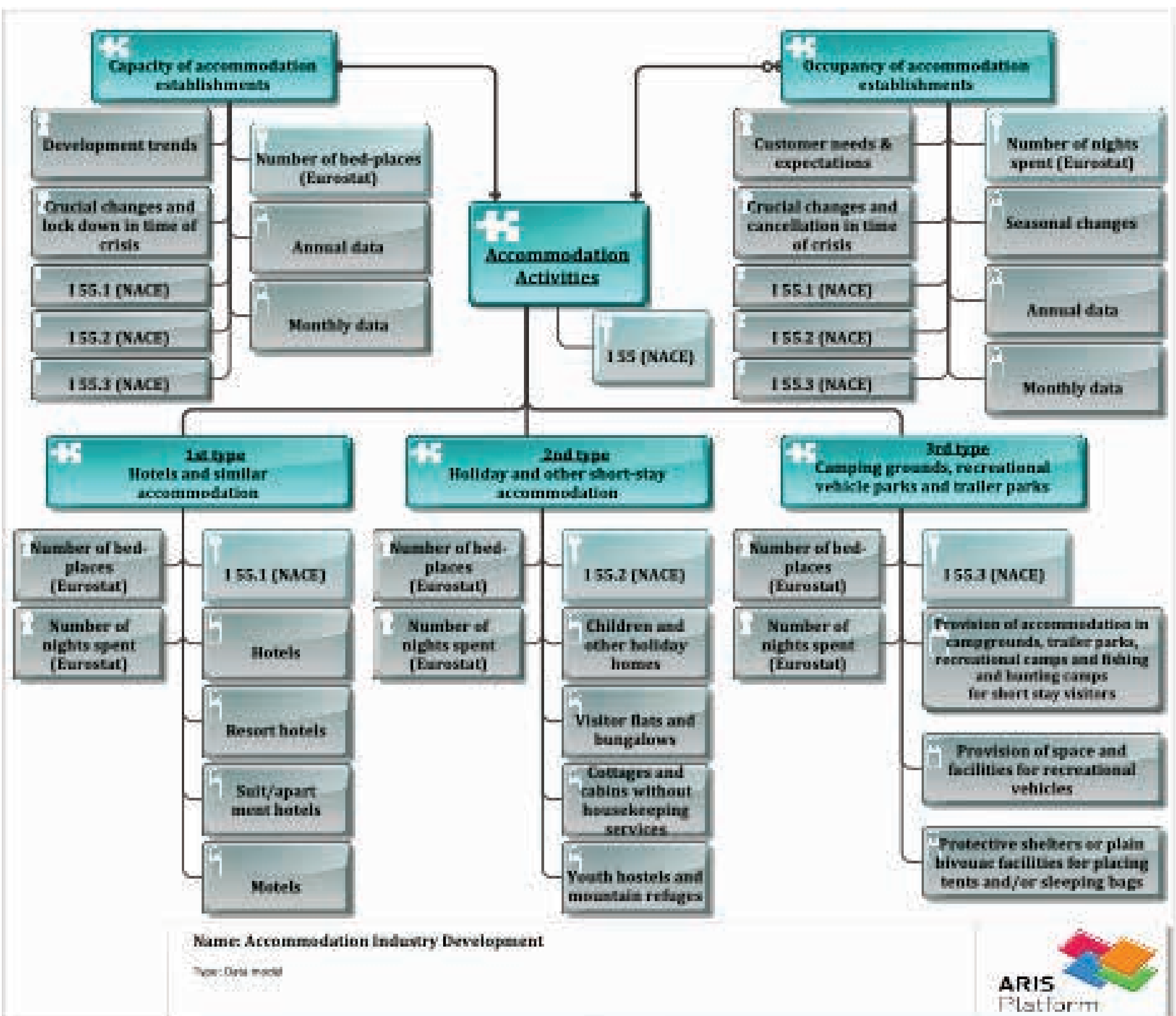


Figure 1: Data model of accommodation industry development in the European area

ties. There are various types of accommodation activities. According to NACE Rev. 2 Statistical classification of economic activities in the European Community (European Communities, 2008), the accommodation activities are divided into four groups by type (the division I 55). At the same time, the Eurostat online database reflects information about the accommodation activities for only three types (Eurostat, 2020a, 2020b, 2020c, 2020d; Eurostat Statistics Explained, 2020a, 2020b, 2020c). There are no data for the fourth type, Other accommodation (I 55.9), which includes student residences, school dormitories, workers' hostels, rooming and boarding houses, and railway sleeping cars (European Communities, 2008). Therefore, in this article, we study the accommodation activities of only three types, which are shown in Figure 1. The primary key of these entities is established according to NACE. Rev. 2 Section I—Accommodation and Food Service Activities, Subsection 55, Accommodation (European Communities, 2008). The additional information for an entity is represented as an attribute (Figure 1). The other factors that affected accommodation industry development, and were studied by different international organisations and scientists, are shown as the foreign key of the data model in Figure 1.

3.2 Data collection

The research was based on the data from the Eurostat online database (Eurostat, 2020g). This database contains voluminous, diverse information collected according to the relevant methodological recommendation guidelines (European Commission & Eurostat, 2019; European Communities, 2008; UN, 2008).

The research covers the accommodation industries of the European countries. However, the Eurostat online database has not recorded data for the accommodation industries of all countries in the European area completely for the period between 2000 and 2019 (Eurostat, 2020a). Data from other databases are not used in this study, because they are collected using distinctive methodological recommendations. Therefore, in this article, the study does not cover some countries, including Estonia, Greece, Iceland, Ireland, Liechtenstein, Lithuania, North Macedonia, Norway, Serbia, Slovenia, Sweden, Switzerland, and the United Kingdom.

4 Results and Discussion

The study done on the accommodation industry showed that the number of nights spent at tourist accommodation establishments (the number of NSTAEs) increased by 49% on average in the European region between 2000 and 2019 (Figure 2). The number of nights grew in both groups of more and less powerful accommodation industries (Figure 2). In general, a 59% increase in the number of nights spent at accommodation establishments (NSAEs) for the first group is recorded in France (Figure 2a). At the same time, the number of NSAEs also increased significantly in less robust accommodation industries: Lithuania (+536%), Latvia (+271%), Bulgaria (+217%), Croatia (+195%), Poland (+91%), and Portugal (+85%), shown in Figure 2b. Nevertheless, none of the less robust accommodation industries have risen beyond the average level in the European region.

The literature review pointed out that tourism and hospitality was affected by several global crises between 2000 and 2019, but there was no significant decrease in the number of NSTAEs in Figure 2. For instance, the number of nights spent at accommodation establishments decreased only by 4% on average in the European region in 2009 (compared to the previous year). A significant decline of the number of NSTAEs was recorded for a few countries when compared to the previous year: Latvia (–27%), Lithuania (–22%), Romania (–16%), Slovakia (–16%), and Bulgaria (–16%). Generally, the decrease in the number of nights spent at accommodation establishments in other countries was at the level of 1–3%. Thus, there is a significant regional difference.

These results confirm the growth of the number of nights spent at accommodation establishments in Europe between 2000 and 2019. We have therefore analysed the potential of the European accommodation industry to satisfy this rapidly growing tourist demand.

The number of nights spent at accommodation establishments generally grew steadily in all countries between 2000 and 2019. In a few countries, though, the number of NSTAEs increased quite significantly (e.g., France in 2010, Croatia in 2012, etc.). Their experience should thus be studied more thoroughly.

The capacity of the accommodation establishments (the number of beds) also increased continuously year-to-year in the European region (Figure 3). The number of beds increased by 29% (Figure 3), and it was lower than the growth in the number of NSTAEs (Figure 2) on average in the European region between 2000 and 2019. If the European accommodation industry continues to develop in this way, it will experience a deficit in the number of beds.

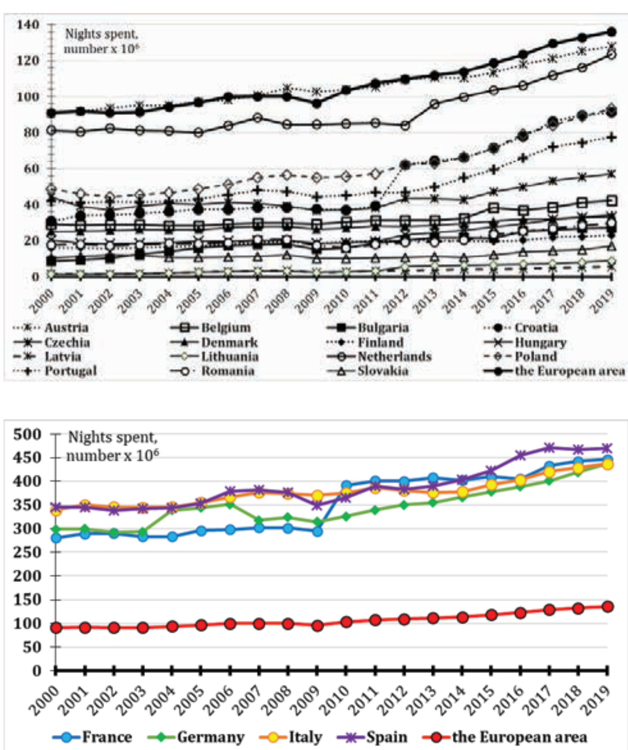
The highest number of accommodation beds, as well as the highest number of NSTAEs, was recorded in four countries: France, Italy, Spain, and Germany (Figures 2 and 3). Among these four, the highest number of beds was in France (Figure 3a), and the largest number of NSTAEs was in Spain (Figure 2a).

Looking at Figure 2a and Figure 3a, a special case can be highlighted. In France, the number of beds rapidly increased by 22% in 2001 compared to the previous year (Figure 3a), whereas the number of NSAEs increased only by 3% (Figure 2a). The capacity of the accommodation industry in France was significantly higher than in other countries during these 9 years (Figure 3a). Nevertheless, the number of nights spent at the French accommodation establishments was lower than for more robust accommodation industries from between 2000 and 2009. Thus, the growth of the capacity of accommodation establishments did not result in an increase in the number of nights spent in France whether in the short or long term. Further, in 2010, the capacity of the French accommodation establishments declined by 14% (Figure 3a), whereas the number of NSAEs increased by 33% and, as result, reached its highest level (Figure 2a). Thus, the number of tourist nights increased due to the impact of other factors, and not due to the increased capacity.

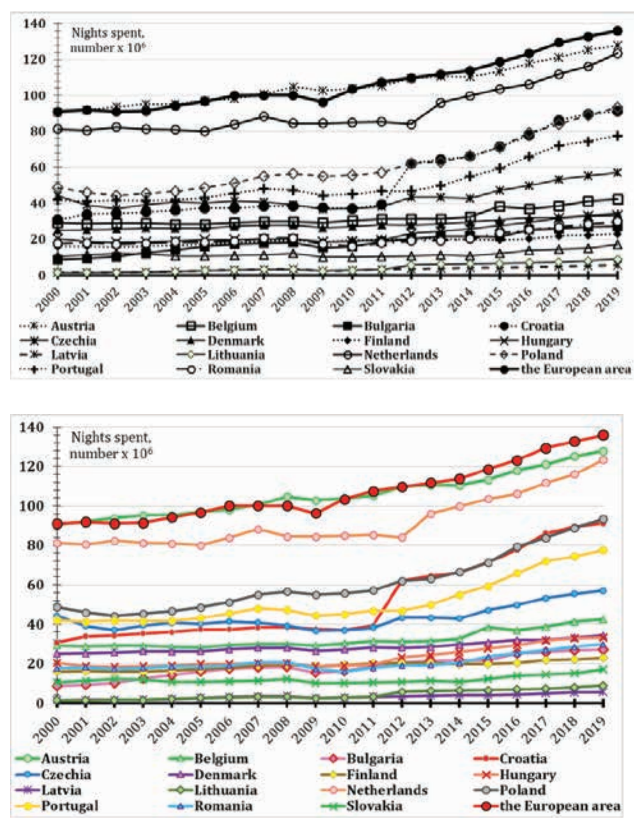
This result is also confirmed by the activity of the accommodation industry in Spain. The capacity of the Spanish accommodation establishments was at the lowest level in the group of more robust accommodation industries (Figure 3a), but the number of nights spent was at the highest level (Figure 2a).

Looking at the group of less robust accommodation industries, one more argument can be highlighted. The number of beds in the Croatian accommodation establishments increased by 83% in 2012 (compared to the previous year; Figure 3b). At the same time, the number of NSAEs increased only by 58% (Figure 2b). It is therefore an outlier to the mentioned results and requires more thorough study.

In reference to this issue, we studied the distribution of both the number of NSTAEs and the number of beds by accommodation types. Figure 4 shows the change in



(a) more powerful accommodation industries



(b) Less powerful accommodation industries

Figure 2: Number of nights spent at tourist accommodation establishments in the European area, 2000 to 2019. (a) More robust accommodation industries; (b) less robust accommodation industries. Source: Elaboration based on Eurostat online database (online data code: tour_occ_ninat)

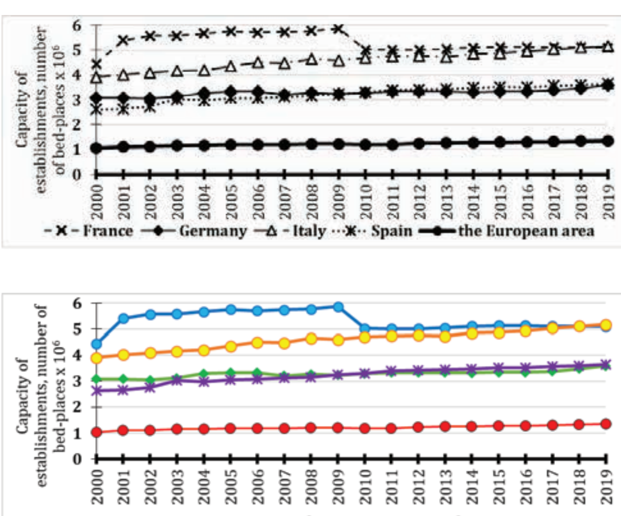
the number of nights spent at establishments of the first accommodation type (hotels and similar accommodations) in the European region between 2000 and 2019. This indicator increased in all countries rapidly and steadily (+47%, on average) during this period. As a result of such growth, the accommodation activity of the first type showed a higher rate of the total number of the NSTAEs than the other two types (Figures 2 and 4).

The number of NSTAEs of the first accommodation type grew continuously without a particular change. In 2009, though, the number of NSAEs did not significantly decrease by 5% (compared to the previous year) on average in the European region. It is noteworthy that the decline in the number of nights spent at the establishments of the first accommodation type was recorded in all countries. In 2009, the biggest decreases in the number of NSAEs at the first accommodation type was observed for the accommodation industries in Latvia (–23%), Lithuania (–20%), Bulgaria (–17%), Slovakia (–17%), and Romania (–17%) when compared to the previous year. The lowest losses were in Germany (–1%), Italy (–2%), Austria (–3%), Poland (–3%), and the Netherlands (–3%).

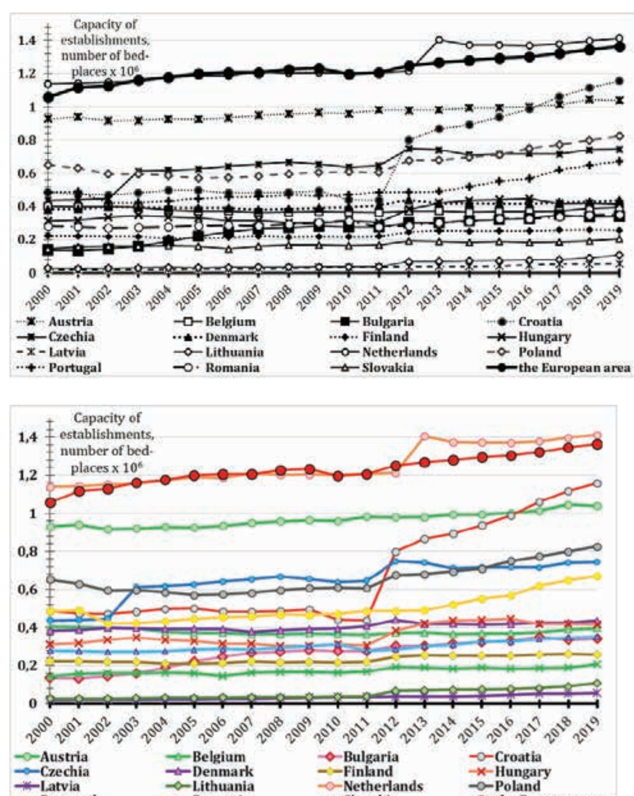
Figure 5 shows that the capacity of establishments of the first accommodation type in the European region increased by 25% on average between 2000 and 2019. The number of beds grew, as did the number of nights spent at accommodation establishments, but the rate was not as rapid. In addition, Eurostat highlights that seasonal fluctuations were less prominent for the first tourist accommodation type than for other types (Eurostat Statistics Explained, 2020b). Thus, the first tourist accommodation type developed continuously and grew steadily.

Figure 6 shows a growth in the number of nights spent at the establishment of the second accommodation type (holiday and other short-stay accommodation) in the European region from 2000 to 2019. At the same time, this increase was not steady. There were several crucial changes. For instance, in one of the more robust accommodation industries, in Germany the number of NSAEs increased by 53% in 2004, and then decreased by 34% in 2007 (compared to the previous year; Figure 6a). The number of the total NSAEs (Figure 2a), therefore, varied due to this change.

Several special cases of changing the number of total NSAEs in different countries are shown. One of them is for the French accommodation industry. However, the Eurostat database did not record information about the number of NSAEs for the second accommodation type in France from 2000 through 2010. Thus, it is impossible to clarify the development of the French accommodation industry during this period, which is a limitation of this study.



(a) More powerful accommodation industries



(b) Less powerful accommodation industries

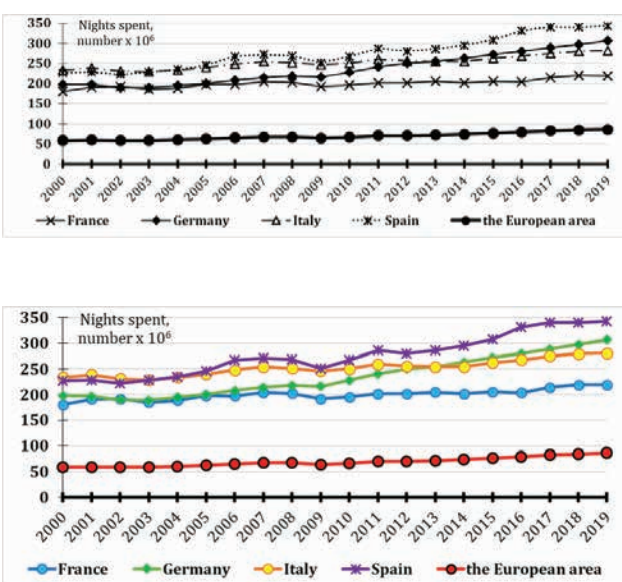
Figure 3: Capacity of tourist accommodation establishments in the European area (number of bed-places), 2000–2019. (a) More powerful accommodation industries; (b) less powerful accommodation industries. *Source:* Elaboration based on Eurostat online database (online data code: tour_cap_nat)

From 2000 through 2009, the number of nights spent at establishments of the second accommodation type in less robust accommodation industries varied significantly. Since 2010, the NSAEs at the second accommodation type grew in both groups of the accommodation industries (more and less robust). The number of NSAEs by the second accommodation type in Croatia increased by 529% (compared to the previous year) and exceeded the average level (Figure 6b), specifying the growth of the total NSAEs in this country (Figure 2a). These results point out that the changes in the number of the NSAEs of the second accommodation type (Figure 6a) significantly determined the changes in the number of the total NSAEs (Figure 2a).

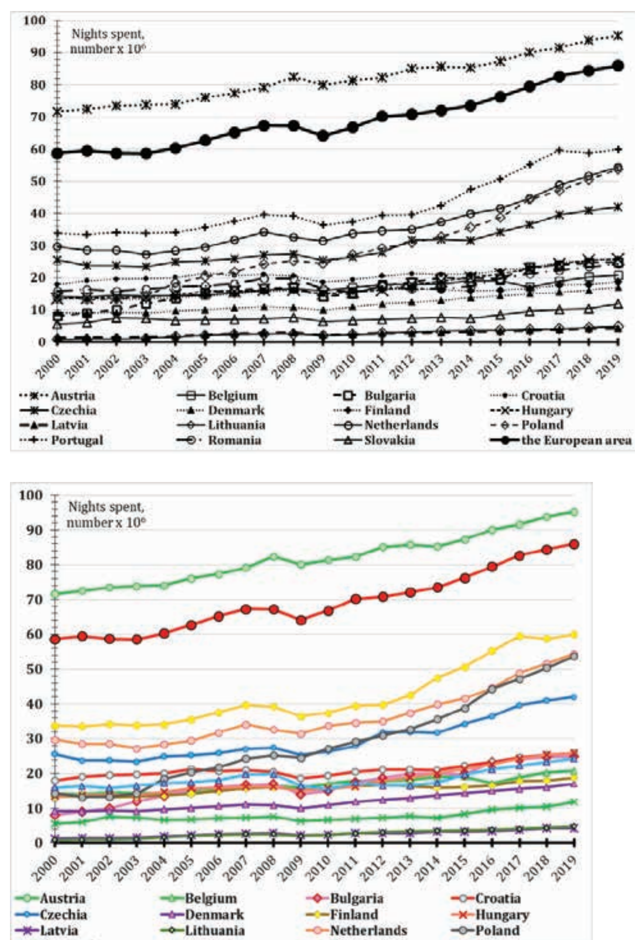
The capacity of the establishments of the second accommodation type in the European region was not appreciable (Figure 7). The number of beds in the second accommodation type in more robust accommodation industries was not significantly higher than the average level of this indicator in the European region (Figure 7a), contrasting with sharp distinctions of the number of beds in the first accommodation type (Figure 5a). This result points out that the second accommodation type is popular in countries with a less robust accommodation industry. Nevertheless, the capacity of the establishments of the second accommodation type in Italy has sharply increased since 2011 (Figure 7a). The number of nights spent at Italian establishments of the second accommodation type has grown, too, although it grew steadily from 2000 through 2019 (Figure 6a). Moreover, it did not cause any change in the total number of nights spent in Italy (Figure 2a). As a result of this growth, the Italian accommodation industry had the highest number of establishments of the second accommodation type in 2019 (Figure 7a), but it did not have a significantly higher number of NSAEs of the second accommodation type in relation to the other more robust accommodation industries (Figure 6a).

The result shows a reverse case (Figure 7b). One of the less robust accommodation industries—in Croatia—increased its capacity of the second accommodation type in 2011 (Figure 7b). This result related to the growth in the number of NSTAEs for both the second accommodation type (Figure 6b) and the total (Figure 2b). Accommodation industries in other countries changed the capacity of all accommodation types simultaneously.

On average, the number of nights spent at establishments of the third accommodation type (camping grounds,



(a) More powerful accommodation industries



(b) Less powerful accommodation industries

Figure 4: Number of nights spent at tourist establishments of the first accommodation type (hotels and similar accommodations) in the European region, 2000–2019. (a) More robust accommodation industries; (b) less robust accommodation industries. *Source:* Elaboration based on Eurostat online database (online data code: tour_occ_ninat)

recreational vehicle parks, and trailer parks) in Europe did not increase significantly (+23%) from 2000 through 2019 (Figure 8), relative to the growth of the number of both the first (Figure 4) and second accommodation types (Figure 6). This low growth in the number of NSTAEs for the third accommodation type is determined by the high seasonality of this service type.

Figure 8 shows that a few accommodation industries increased the number of NSAEs for the third accommodation type. The number of nights spent at French establishments of the third accommodation type was significantly higher (Figure 8a). From 2000 to 2008, this indicator did not change, although the number of NSAEs at the third accommodation type in France has increased steadily (+30%) since 2009 (Figure 8a). This resulted in the growth of the total number of NSAEs (Figure 2a).

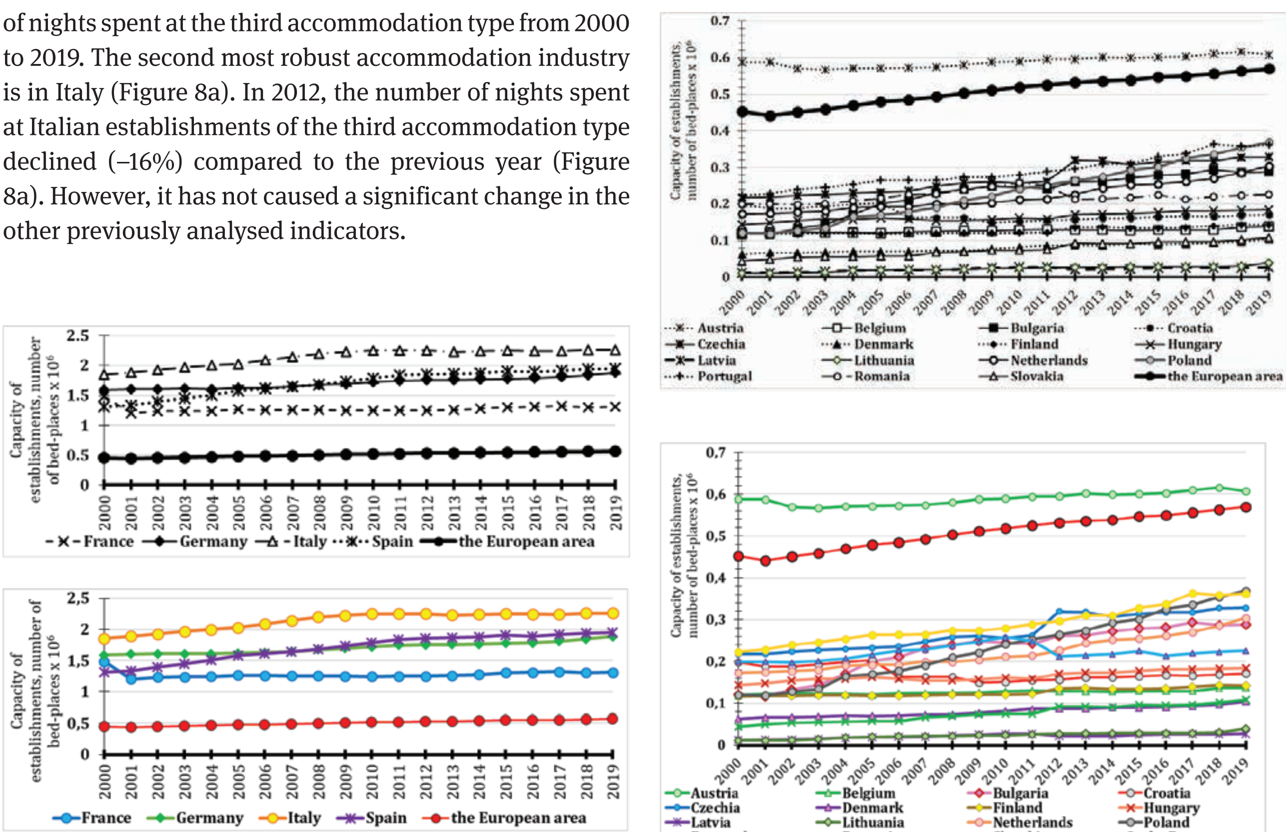
The Croatian accommodation industry also increased the number of nights spent at the third accommodation type (Figure 8b). However, this indicator of the Croatian accommodation industry increased steadily (+79%) from 2000 to 2019.

A few accommodation industries reduced the number of nights spent at the third accommodation type from 2000 to 2019. The second most robust accommodation industry is in Italy (Figure 8a). In 2012, the number of nights spent at Italian establishments of the third accommodation type declined (–16%) compared to the previous year (Figure 8a). However, it has not caused a significant change in the other previously analysed indicators.

A high number of nights spent at establishments of the third accommodation type was recorded in the Netherlands. Nevertheless, from 2000 to 2019, this indicator changed inconsequentially (Figure 8b) as did the number of NSAEs for the second accommodation type (Figure 6b).

The French accommodation industry took leadership in both indicators: the number of nights spent at establishments of the third accommodation type (Figure 8a) and the capacity of establishments of the third type (Figure 9a). In 2001, the number of beds in France increased (+33%), and then in 2010, it decreased (–24%), compared to the previous year. Nevertheless, there was no significant change in the number of nights spent at establishments of the third accommodation type (Figure 8a). At the same time, it should be recognised that as mentioned earlier, a lack in the data of NSTAEs of the second accommodation type (Figure 6a) limits this analysis.

The data indicate a significant increase in the number of beds in Czechian establishments of the third accommodation type (up 7.5 times) in 2013. It relates to the growth of the number of nights spent at establishments of the



(a) More powerful accommodation industries

(b) Less powerful accommodation industries

Figure 5: Capacity of establishments of the first accommodation type (hotels and similar accommodations) in the European region (number of beds), 2000–2019. (a) More robust accommodation industries; (b) less robust accommodation industries. *Source:* Elaboration based on Eurostat online database (online data code: tour_cap_nat)

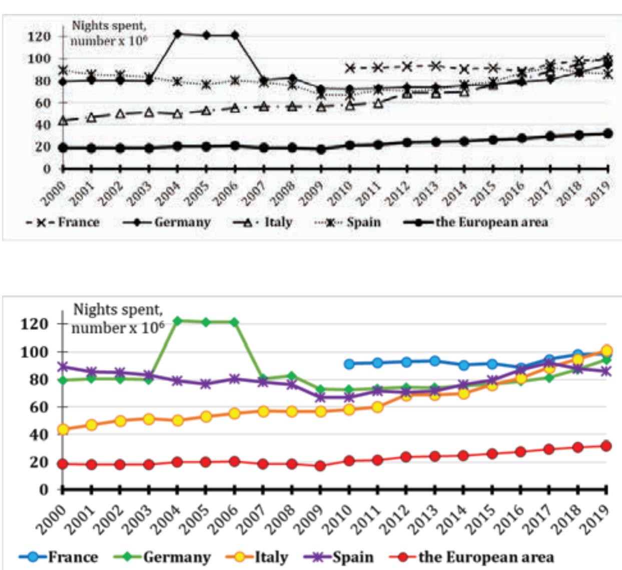
third accommodation type (Figure8 b). However, there is an increase in the number of the NSAEs of both other types during this period, the first type (Figure 4b) and the second type (Figure 6b), so, it was realised through a set of different factors.

Figure 9 shows that the number of beds of the third accommodation type had not increased in the European region from 2000 to 2019. Since 2009, more robust accommodation industries decreased capacity of the third type. As a result of these processes, the capacity of the establishments of the third accommodation type (camping grounds, recreational vehicle parks, and trailer parks) had not increased (+3%) on average in the European area from 2000 to 2019 (Figure 9).

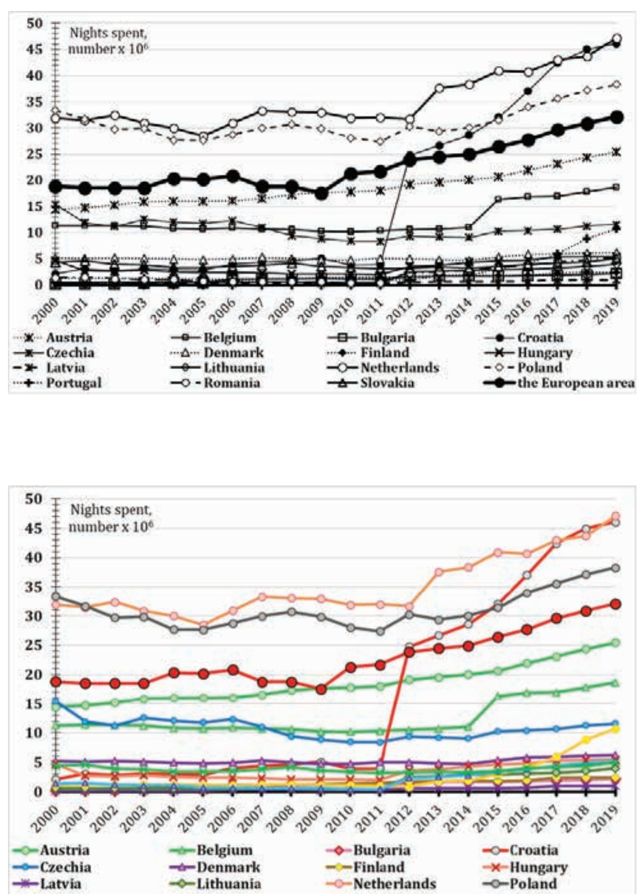
This result could be explained by the high seasonality of activities of the third accommodation type. It should be also noted that according to Eurostat data (Eurostat Statistics Explained, 2020b), the high seasonality was recorded for the accommodation industries in Croatia, France, and Italy. The results showed that the industries in these countries had recorded a crucial growth of the indicators for the second and third accommodation types, which are characterised as medium and high seasonality, respectively. Having studied this information, the special cases of the accommodation industries of these countries can be explained.

The research result shows that there was a great disparity in the distribution of both the number of nights spent at establishments and the number of beds by accommodation type. We therefore elaborated on a data model of development trend of the European accommodation industry by accommodation activity types to analyse changes in activity by the accommodation types more carefully (Figure 10).

The literature review points out that seasonal changes strongly affect accommodation activity and could vary the development trend of the accommodation industry considerably. This information helped to clarify some special cases. Taking that into account, the seasonal changes are covered in the data model of development trend of the European accommodation industry by accommodation activity types, from 2000 to 2019. The result of the literature review was used to clarify some cases (particularly, Eurostat analysis of the seasonal development of the accommodation industry); this information is indicated as a foreign key in Figure 10.

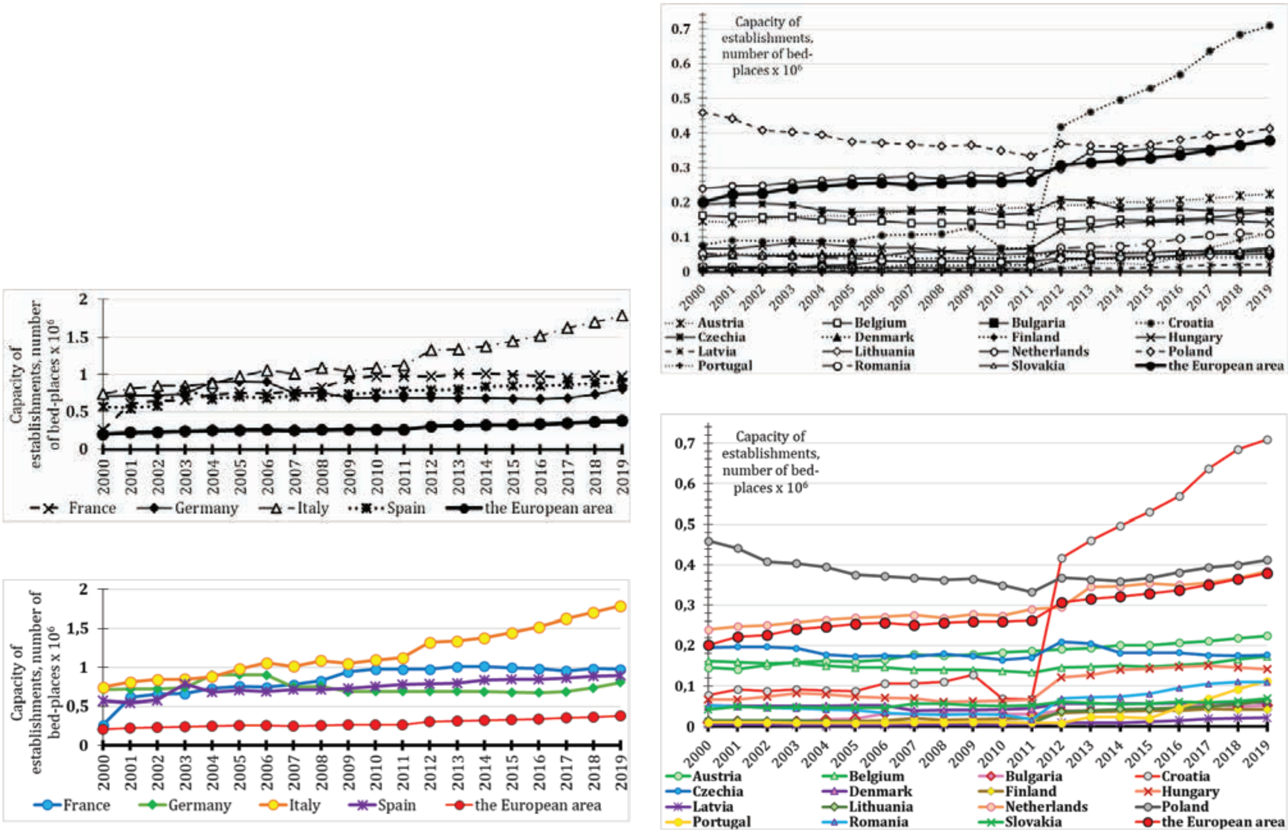


(a) More powerful accommodation industries



(b) Less powerful accommodation industries

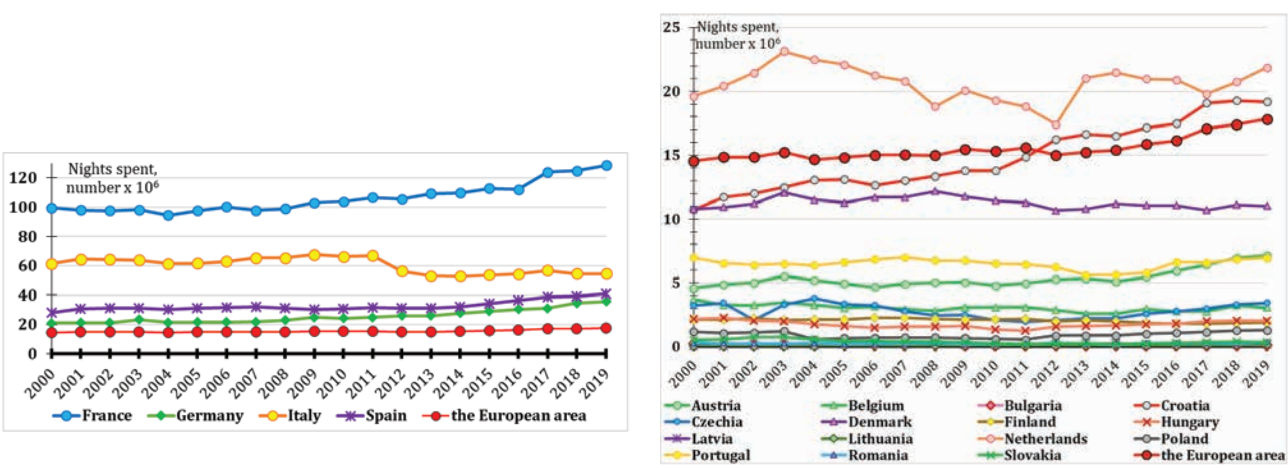
Figure 6: Number of nights spent at establishments of the second accommodation type (holiday and other short-stay accommodation) in the European region, 2000–2019. (a) More robust accommodation industries; (b) less robust accommodation industries. *Source:* Elaboration based on Eurostat online database (online data code: tour_occ_ninat)



(a) More powerful accommodation industries

(b) Less powerful accommodation industries

Figure 7: Capacity of establishments of the second accommodation type (holiday and other short-stay accommodation) in the European region (number of beds), 2000–2019. (a) More robust accommodation industries; (b) less robust accommodation industries. Source: Elaboration based on Eurostat online database (online data code: tour_cap_nat)

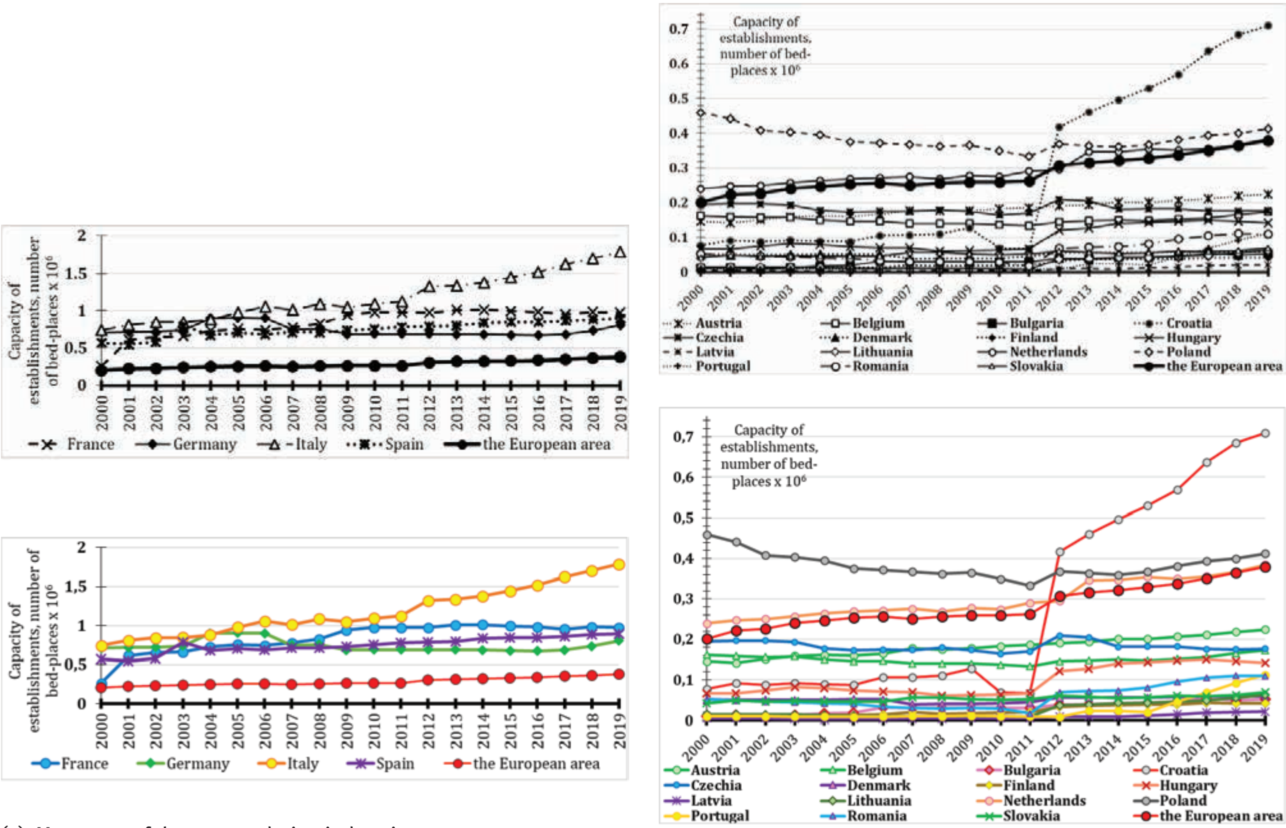


(a)

(b)

Figure 8: Number of nights spent at establishments of the third accommodation type (camping grounds, recreational vehicle parks, and trailer parks) in the European region, 2000–2019. (a) More robust accommodation industries; (b) less powerful accommodation industries. *Source*: Elaboration based on Eurostat online database (online data code: tour_occ_ninat)

Looking at Figure 10, it is clear that the first type of accommodation activity developed like the total industry activity by both indicators (the number of NSTAEs and the number of beds). In addition, it had the highest ratio of



(a) More powerful accommodation industries

(b) Less powerful accommodation industries

Figure 9: Capacity of establishments of the third accommodation type (camping grounds, recreational vehicle parks, and trailer parks) in the European region (number of beds), 2000–2019. (a) More robust accommodation industries; (b) less robust accommodation industries. *Source:* Elaboration based on Eurostat online database (online data code: tour_cap_nat)

the indicators of the first accommodation type in the total number (Figures 2–5). Thus, accommodation activity of the first type is the main activity type in the accommodation industry.

At the same time, accommodation activity of the second type had the biggest increase by both indicators over the period from 2000 to 2019. The number of beds in the establishments of the second accommodation type grew by 89% and has significantly risen beyond a level of the increase of total capacity for all types. This trend is affected by several factors. The results point out that the accommodation services of the second type are more popular than the first type services in times of economic imbalance and crisis. Hoteliers also focused on the experience of crucial growth of some countries in the second accommodation type. At the same time, there was a significant regional difference in the European area, which should be taken into account. Thus, accommodation industries, with a powerful capacity of the second accommodation type, could exploit an opportunity for more profitable activities, due the conditions of the current crisis. However, the accommodation activity of the second type is subject to seasonality, so based on Eurostat data for previous years, the accommodation activity of the second type will be lower from September to May. Therefore, the accommodation industries with high seasonality, should consider these changes.

The accommodation activity of the third type had the lowest increase by both indicators. The number of beds of the third accommodation type increased by only 3%, but the number of nights spent at establishments of this type grew by 23%, over the period from 2000 to 2019. If the accommodation capacity of the third type continued to develop in this way, there would be a lack of beds of this type to meet travellers' needs. It should also be taken into account that during the COVID-19 pandemic, accommodation services of the third type of establishments (camping grounds, recreational vehicle parks, and trailer parks) have been more popular due to the need for social distance. Thus, the accommodation industries, with strong capacity of the third accommodation type, would have a growth opportunity through the lockdown period for the

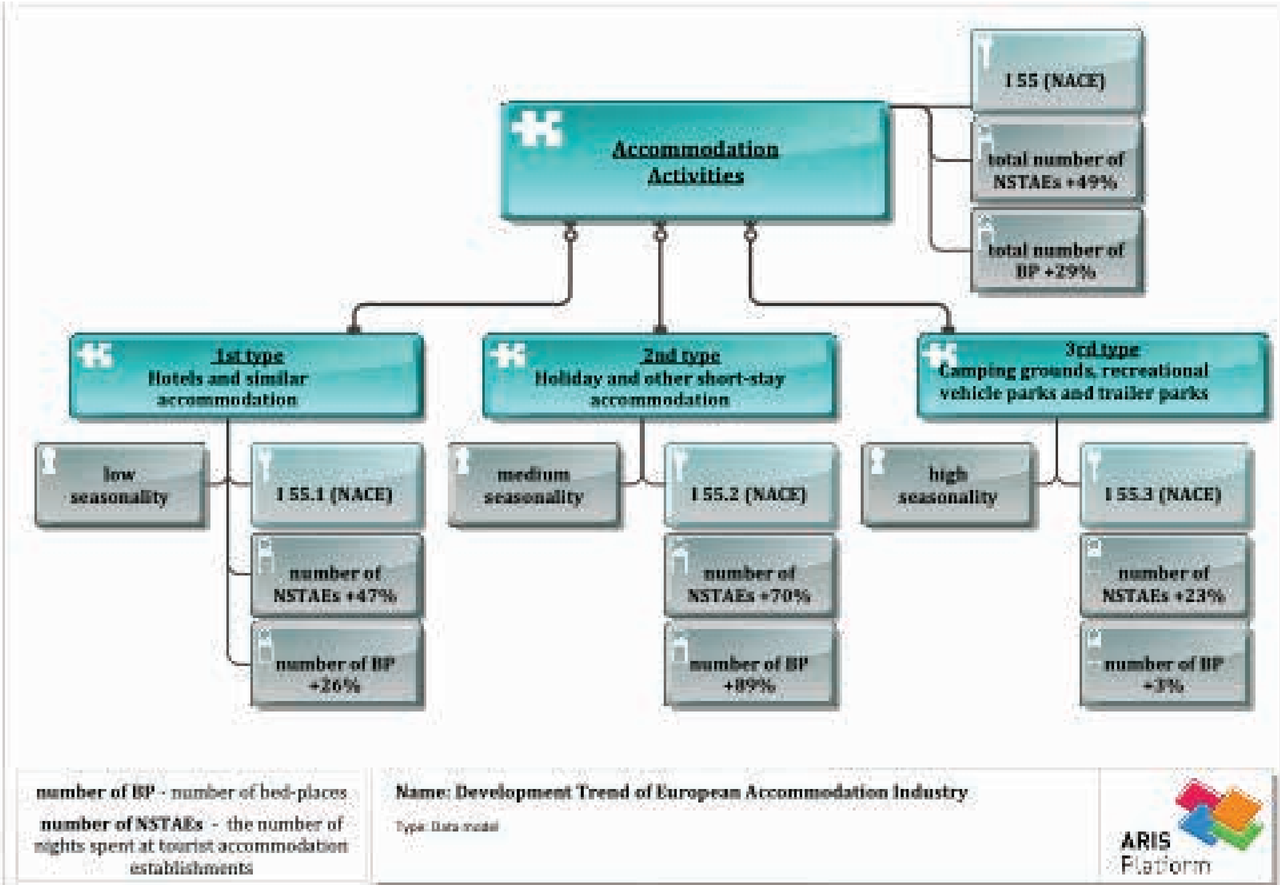


Figure 10: Data model of development trend of the European accommodation industry by accommodation activity types (number of nights spent at tourist accommodation establishments, the number of NSTAEs and the capacity of establishments, and the number of beds).

accommodation establishment of the first and second types. Accordingly, Eurostat records the highest seasonality for the third accommodation type activity. These services will be significantly decreased from September to May, which should be taken into account. Nevertheless, there are accommodation industries with bimodal seasonality (particularly in Austria). Therefore, such accommodation industries have the first opportunities for strong activity in the winter season (from December–March).

5 Conclusion

Throughout this study, it has been possible to observe the development of the accommodation industry, as well as the development of the three accommodation activity types. As with previous research, the results in this article support findings that the number of nights spent at tourist accommodation establishments grew continuously in European countries over the period between 2000 and 2019. The literature review points out that tourism and hospitality were affected by several global crises during that period. However, the results show that there was not any significant decrease in the number of nights spent at tourist accommodation establishments in European countries on average. The number of nights spent at accommodation establishments decreased by 1–3% in 2009 compared to the previous year. Nevertheless, there are significant differences between both the regional and the accommodation activity types. In 2009, the biggest decrease in the number of nights spent at tourist establishments was recorded by the first accommodation type (hotels and similar accommodations) and, quite significantly, that this reduction was recorded for all countries.

The number of nights spent at establishments of the first accommodation type increased steadily (except for 2009). This indicator varied by other accommodation types, however, during the same period from 2000 to 2019. The study results point out several cases of special changes in the number of nights spent. These crucial changes in the number of nights spent at the second accommodation type determine the significant changes in the number of the total nights spent (all types). Hoteliers' focus on these growth experiences of the accommodation industry determined the biggest increase of activities for the second accommodation type (holiday and another short-stay accommodation). The number of nights spent at establishments of the third accommodation type (camping grounds, recreational vehicle parks, and trailer parks) also increased insignificantly. One of the factors considered was the high level of seasonality of this activity type.

The rapid increase in the number of tourist nights spent requires corresponding accommodation facilities. The capacity of the accommodation establishments (number of beds) also increased continuously year-to-year in Europe. The result of the analysis of some cases in particular countries, however, shows that the number of beds was not a key factor affecting the number of tourist nights spent. It is also quite significant that the growth in the number of beds was slower (+29%) than the growth in the number of nights spent (+49), on average in Europe, over the study period. The development of the European accommodation industry, in this way, would be limited by a lack in the number of beds. This issue is thoroughly studied through the elaborated data model of development trend of the European accommodation industry by accommodation activity types. The results of this analysis point out that the activity of the first accommodation type is central to the accommodation industry as a whole, and the development rate of the type of accommodation activity relates to the total development rate of the industry.

At the same time, the accommodation activity of the second type had the biggest increase by both indicators over the period from 2000 to 2019. The number of beds in the establishments of this type grew by 89% and significantly rose beyond the level of the increase of total capacity for all types. This trend was affected by several factors (e.g., popularity and high demand in a time of economic imbalance and crisis, hoteliers' focus on crucial growth experience of some countries, etc.). However, the accommodation activity of the second type has seasonality in that there is a decrease in travel from September to May. Therefore, accommodation industries with high levels of seasonality, should consider these changes in planning their growth strategy.

The accommodation activity of the third type has the lowest increase in indicators. The number of beds of the third accommodation type increased by only 3%, but the number of nights spent at establishments of this type grew by 23% over the period from 2000 to 2019. This development trend could result in a deficit in the number of beds of this type. It also be taken into account that accommodation services of this type (camping grounds, recreational vehicle parks, and trailer parks) are currently more popular due to the increases in desire for social distance. Thus, the accommodation industries, with powerful capacity of the third accommodation type, had growth opportunity, realised through the lockdown period for the accommodation establishment of the first and second types. This third accommodation type activity, however, has the highest level of seasonality. That results in a significant decrease in the third accommodation type activity from September to May, which should be taken into account. Nevertheless, the accommodation industries with bimodal seasonality have opportunities for strong activity levels in the winter season (December–March).

This study highlights the importance of the consideration by the development strategy not only of the capacity of the accommodation industry, but also the variety of types of accommodation activities. Thus, the study results point out that even a less robust accommodation industry has opportunities to grow in a difficult and uncertain period. A variety of business conditions need to elaborate on and implement appropriate policies and strategies, however, to provide competitive advantages in the development of the accommodation industry.

6 Limitations and Future Research Directions

This study has some limitations. First, the research was based only on data from the Eurostat online database, in which complete information for the accommodation industries of all countries in Europe for 2000 through 2019 were not recorded. The data from other databases were collected using distinctive methodological recommendation guidelines, so they are not used in this study. Therefore, this study does not cover some countries. At the same time, it has identified national differences in the development of the European accommodation industry, which should be considered in planning a national strategy. Second, the research covers accommodation industries only of European countries, so the study of another region would be a possible future direction for the research.

The study results shows the rapid growth of the European accommodation industry, determined by the potential of the lack of beds. Changes in the occupancy rates, the number of residences and no-residence arrivals, and same-day visits were not carefully studied. It should be noted that the unambiguous statement about the development trends requires more thorough studies and integration of changes due to impacts of current larger processes (e.g., globalisation, digitalisation, sustainability, etc.). Thus, our future research directions are to study these indicators thoroughly in a comprehensive analysis of their impact on the development of the accommodation industry in an integrated way.

Bionotes

Mykola Rohoza is a doctor of economic sciences, professor, Honoured Worker of Science and Engineering of Ukraine, academician of the Academy of Economic Sciences of Ukraine, and academician of the International Academy of Biotechnology.
Valentyna Stolyarchuk holds a PhD in technical science. She currently works as associate professor (Docent) for the Hotel, Restaurant, and Resort Business Department at Poltava University of Economics and Trade, Poltava, Ukraine. She investigates in the area of innovation in hospitality and tourism, in particular, in the context of the accommodation industry. Her second research interest is innovation in the restaurant industry, particularly using nontraditional vegetable raw materials in food technologies.

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