











“Changes in hotel activities in Ukraine and Poland due to the war: Migration aspect”

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CHANGES IN HOTEL ACTIVITIES IN UKRAINE AND POLAND DUE TO THE WAR: MIGRATION ASPECT

Abstract

Internal displacement to safer regions and migration abroad became a new phenomenon in Ukraine due to Russian military aggression. Accordingly, hotels began to provide services to a new category of consumers – internally displaced persons (in Ukraine) and migrants (abroad). In 2022, Poland received the most migrants from Ukraine due to its geographical position and significant economic ties. This study aims to identify changes in hotel activities in Ukraine and Poland caused by internal and external migration. The results are based on Computer Assisted Web Interviewing (CAWI) conducted in April-July 2023, to which 300 hotels in Ukraine and Poland were invited. Answers were received from 93 Ukrainian and 94 Polish hotels. The majority (66% in Ukraine and 62% in Poland) have a star rating of 2-3*, with an average capacity of 45 rooms in Poland and 49 in Ukraine. According to hotel managers, the level of occupancy of hotels increased on average – in Ukraine by 6% and in Poland by 13%. The specific weight of migrants in hotels in Poland was 23% of all customers; in Ukraine, it was 12%. Hotels in both countries began to introduce new services, attract different sources of cost coverage (however, Polish hotels used wider opportunities), and attract migrants to employment (34% in Poland and 7.5% in Ukraine), contributing to additional occupancy rates and financial stability. Changes in hotel operations caused by migration processes as a result of the war reflect their adaptability and economic sustainability.

Keywords

migration, forced tourism, business entities,
management, services, financing, development strategy,
innovation

JEL Classification

F22, L83

INTRODUCTION

Russia's full-scale military aggression, which has been ongoing since February 2022, has radically changed the socio-economic life in Ukraine and caused significant internal and external migration. In Ukraine, 4.9 million people became internally displaced persons (Ministry of Social Policy of Ukraine, n.d.), and 5.6-6.7 million Ukrainians went as migrants abroad; the highest number – 27% – stayed in Germany and 24% – in Poland (Vyshlinsky et al., 2023). Considering that Ukraine and Poland have one of the longest land borders with European countries – 542 km (for example: with Slovakia – 98 km, Hungary – 135 km, and Romania – 608 km), the largest number of checkpoints – 17 (for example, with Slovakia – 6, Hungary – 8, and Romania – 11) (State Border Service Ukraine, n.d.), the highest volume of migrants, especially in the first year of the full-scale war (2022), was received by Poland, as it became a transit country through which Ukrainian migrants went on to European countries, the USA, and Canada.

Clearly, the war affected the economic stability of Ukraine and Poland, which was reflected in the business environment. In particular, in relation to the hotel business, new challenges have arisen due to changes in consumer requests and the structure of consumers themselves. In

Ukraine, these are internally displaced persons (IDPs) who need short- or long-term accommodation, and abroad – Ukrainian migrants who are looking for housing both temporarily and for permanent residence. The hotel business in both countries is forced to adapt to new challenges regarding the need for changes in management, marketing strategies, and innovations to provide services to new categories of consumers. Therefore, it is crucial to analyze possible changes in the hotel business of both countries to compare their experience in managing consumer flows and ensuring their accommodation and integration with partners. The study of these changes will help predict how these processes will affect the future development of the hotel business. It can also become the basis for a better understanding of the role of cooperation in overcoming the consequences of migration crises, finding effective strategies to support and restore the hotel business, which can also become the basis for state policy and business decisions.

1. LITERATURE REVIEW

The hotel business is one of the most important tourism components and mutually determine their own functioning (Mazaraki et al., 2019). Therefore, it is impossible not to take into account the patterns of tourism development. Various situational circumstances force careful and deliberate actions that will contribute to new proactive concepts and strategies to transform tourism and direct it to effective development despite existing challenges (Rastegar et al., 2023). Currently, tourism in the world faces challenges of a different nature (Wut et al., 2021), in particular, those related to political events (Lisle, 2000; Dogru-Dastan & Tütüncü, 2024; Seyfi et al., 2023), migration processes (Zenker et al., 2018; Sarı & Meydan Uygur, 2024), wars (Causevic & Lynch, 2011; Varua & Saverimuttu, 2012), as well as the war in Ukraine (Josiasen et al., 2023; Kozłowski, 2023; Levytska et al., 2023; Korolchuk, 2023).

Despite the allegedly antagonistic phenomena of “war” and “tourism” (hotel business as a component of tourism), the consequences of wars can be to some extent positive, which “demonstrates the continuity of the development of modern tourism” (Gordon, 2019). In addition, “tourism has the latent capacity to transform political, social, and economic spheres of life, providing a space through which narratives of peace and benefits for the advancement of knowledge can be created” (Farmaki, 2017). At the same time, tourism and hospitality companies can become adaptive and innovative, for example, when they provide humanitarian aid services (Slim, 2012). In addition, perceived threats to humanity are key motivators for solidarity with countries in crisis (Josiasen et al., 2024), shaping tourism flows when possible.

On the one hand, wars create significant migration flows, and on the other hand, migrants have an impact on the development of tourism due to the need for accommodation, consumption of goods and services, as well as aspirations for employment (Andrews et al., 2023; Duszczuk et al., 2023). However, this influence can have both positive and negative features. The refugee crisis forces tourists from other destinations not to visit regions where migrants are (Zenker et al., 2018). However, “immigrants living in OECD countries have a positive advertising effect for one’s country, stimulating tourist flows from OECD countries” (Balli et al., 2016). Moreover, “migration is a factor of purchasing behavior of tourist products” (Sarı & Meydan Uygur, 2024). Host communities are able to tap into the vast array of social, economic, and human assets that migrants possess (Cruz & Falcão, 2023). According to the United Nations Refugee Agency, “migrants from Ukraine are eager to work” (UNHCR, 2022), which contributes to stimulating employment and economic development of host countries. The full-scale invasion of the Russian Federation in Ukraine has had a significant impact on European and other countries, in particular, on the general economic condition (Mbah & Wasum, 2022; Tank & Ospanova, 2022), financial markets (Deng et al., 2022; Aliu et al., 2023; Kumari et al., 2023; Maurya et al., 2023) food security (Hassen & Bilali, 2022; Lin et al., 2023; Nchasi et al., 2022) and sustainable development goals (Pereira et al., 2022). This armed conflict has led to one of the most significant humanitarian crises in Europe since World War II, with millions of people becoming internally displaced or forced to seek refuge in neighboring countries (Tsutsunashvili et al., 2024), which also affects tourism and hospitality businesses.

Kozłowski (2023) focused on the war consequences for the Russian Federation: the impact of sanctions, the withdrawal of Western companies from the Russian market, and changes in the flows of domestic and outbound tourism. As for Ukraine, the general state of tourism is shown after the destruction of cultural and historical natural attractions and infrastructure, the forced departure of a significant number of people abroad, and the need for restoration. The study concluded, “in the dimension of tourism business, a visible effect is the immediate detouristification of both countries although in different dimensions” (Kozłowski, 2023, p. 15).

The Russian aggression against Ukraine began back in 2014, although at that time, it was characterized by a much smaller scale: parts of the Donetsk and Luhansk regions and the Autonomous Republic of Crimea. And even then, political instability in Ukraine negatively impacted the tourism and hotel business due to a decrease in income, a sharp decline in the number of tourists and overnight stays, and an increase in costs (Ivanov et al., 2016a). The situation in the occupied Ukrainian regions has also significantly worsened. Thus, the survey of hoteliers in the Autonomous Republic of Crimea showed a significant deterioration of hotel operations after the annexation by the Russian Federation due to the loss of the Ukrainian market, rising costs, and international sanctions (Ivanov et al., 2016b).

However, despite the war, Ukraine is able to offer creative, sustainable tourism products (Korolchuk, 2023). This is facilitated by the spread of solidarity tourism in Ukraine, which can already be observed due to the increase in demand for hospitality services (Josiassen et al., 2023; Josiassen et al., 2024; Nautiyal & Polus, 2022). Certain Ukrainian regions demonstrate positive development examples. For example, in Zakarpattia (one of the western regions of Ukraine, the most protected from the influence of the war), hotels are demonstrating the transition to long-term rentals, quality services for internally displaced persons, or offer substitutes for outbound tourism products for those affected by border restrictions (Tomej et al., 2023).

The full-scale invasion of the Russian Federation in Ukraine had a significant impact on the economy of European countries (Tank & Ospanova,

2022; Tsutsunashvili et al., 2024), including Poland, especially in areas dependent on labor migration (Żuk, 2023). Polish hotels became a refuge for Ukrainians, and new challenges appeared due to the long-term stay of migrants (Korzeniewski et al., 2024) and the need to provide employment opportunities specifically in the field of services and hotel business, since “this wave migration from Ukraine is predominantly female” (Andrews et al., 2023) and women are more involved in this sphere. Moreover, “the solutions implemented in Poland are among the most extensive and most useful for war refugees. They concern ... subsidizing their stay in private apartments, houses and organized residences (Duszczyk et al., 2023). The example of Poland accommodating migrants from Ukraine can be used as an example of socially responsible business, which is typical for hotels of international chains and independent small and medium-sized establishments (Kulyk et al., 2024).

As a result of the war, the activities of the tourist and hotel business in Ukraine and neighboring Poland are changing. Therefore, there is a need for scientific rethinking, studying the experience of business adaptation, and determining ways of recovery and development of this sphere in new realities.

The goal of the study is to identify and analyze key changes in the activity of hotels in Ukraine and Poland caused by internal movement of people (in Ukraine) and migration (in Poland) as a result of the full-scale invasion of the Russian Federation in Ukraine.

2. METHODS

The survey methodology was used in the study. The survey tool was developed after analyzing the results of changes in the functioning of hotels under the influence of the full-scale invasion of the Russian Federation on the territory of Ukraine and the appearance of internally displaced persons (in Ukraine) and migrants (in particular to Poland) and their needs for accommodation in hotels.

The survey was conducted between April and July 2023 and focused on the period from February 24 to the end of 2022 in hotels of Poland and Ukraine

using the CAWI (Computer Based Web Interview) method. Managers (top managers and/or heads of structural divisions – sales, marketing, and reservation departments) were invited to participate in the survey. The final mailing list included 306 hotels in Poland and 312 in Ukraine, of which 100 hotels in Poland and 98 hotels in Ukraine responded. Some hotels that participated in the survey were reluctant to provide information; therefore, some answers were missing, which reduced the number of questionnaires from Poland by six ($N1 = 94$) and from Ukraine by five ($N2 = 93$). According to the entire set of certified hotels in Ukraine (State Tourism Development Agency of Ukraine, 2021) and Poland (Hotel World, 2023; GUS, 2023), the sample can be considered representative. Hotels from every voivodeship of Poland and every region of Ukraine participated in the survey, excluding temporarily occupied ones. Most often, two- and three-star hotels with an average capacity of 45 rooms in Poland and 49 in Ukraine responded (Table 1).

Table 1. Characteristics of sampled Ukrainian and Polish hotels

Criterion	Poland	Ukraine
Comfort level	94	93
Uncategorized	27	26
Hotels 2*	33	27
Hotels 3*	29	31
Hotels 4*	3	4
Hotels 5*	2	5
Capacity	94	93
Up to 30 rooms	43	38
30-50 rooms	24	27
50-100 rooms	19	16
100-150 rooms	5	5
More than 150 rooms	3	7

The questionnaire used different types of questions and methods of collecting answers, including multiple-choice questions, single-choice questions, and the possibility for respondents to provide their own answers. The questions related to the change in hotel operation formats under the influence of the full-scale invasion of the Russian Federation on the territory of Ukraine and the appearance of migrants on this basis and their needs for accommodation in hotels: 1) hotel occupancy level; 2) specific weight of Ukrainian migrants/internally displaced persons who lived in hotels; 3) areas of assistance provided by hotels to

Ukrainian migrants/internally displaced persons; 4) sources of funding for accommodation services for migrants/internally displaced persons in hotels; 5) average duration of free accommodation for migrants/internally displaced persons in hotels; 5) average amount of compensation received per migrant/internally displaced person per day for hotel accommodation and meals.

3. RESULTS

The tourist and hotel business of Ukraine has been significantly affected, which is reflected in the reduction of the main activity indicators. These events were: in 2014 – the beginning of the Anti-Terrorist Operation in the eastern part of the country (related to the partial invasion of the Russian Federation into Ukraine), from the end of 2019 – the global pandemic of COVID-19 and from the beginning of 2022 – the full-scale military invasion of the Russian Federation. Before these events, Ukraine's tourism and hotel business developed quite intensively. Until 2014, Ukraine ranked 14th in the world in terms of the number of international tourist arrivals, attracting 23-24.7 million people and generating 4.8-5.1 billion US dollars. Since 2015, due to Russia's invasion of the Eastern regions, Ukraine dropped to 30th place due to a decrease in the volume of international arrivals by almost 50% and revenues by 78% (World Tourism Organization, 2013, 2015, 2017, 2019, 2021, 2023). From 2022, international arrivals decreased significantly. In 2022, 2 million people entered the country, primarily representatives of international organizations, journalists, military personnel, and volunteers (Figure 1).

The full-scale invasion of the Russian Federation caused significant losses. Thus, according to the data of the state authorities in Ukraine, by the end of 2023, the total indirect losses caused to the spheres of culture, religion, tourism, and sports amount to 10.8 billion UAH, in particular to the tourism and hotel business – 4.4 billion UAH. Since the beginning of the war, 164 tourism objects, 1,804 cultural objects, and 348 religious buildings have been destroyed, and environmental damage amounts to 2 trillion UAH (National Tourism Organization of Ukraine, 2024). As for hotels, according to preliminary data, 15 hotels with a total number of more than 1000 rooms were destroyed.



Note: Data for 2014 are not available.

Figure 1. Dynamics of international tourist arrivals and revenues in Ukraine in 2012–2022

However, even in such conditions, the tourist and hotel business functions. The reflection of which is, in particular, the payment of taxes. In 2021, the amount of taxes from this field was 2231.8 million UAH, and in 2022, it decreased to 1551.1 mln. UAH (– 30.5%), but already in 2023, it increased to 2049.5 million UAH (+32.1%). In 2023, in the tax structure of tourism and hotel business entities, hotels paid 80.5% (State Tourism Development Agency of Ukraine, 2024).

As the structure of tax payments confirms, the tourism business in Ukraine has significantly decreased since inbound tourism is practically non-functional, and the entry of foreign citizens does not directly affect the activities of Ukrainian tour operators or travel agents. It is clear that the movement of people to safer regions and abroad has intensified in Ukraine. On the contrary, the hotel business, taking into account the need for accommodation, is developing more dynamically.

Table 2. The main challenges to the hotel business of Ukraine as a result of the war

Trends	Their essence
Decrease in tourist flow	The demand for hotel services has decreased significantly in regions close to the war zone. This applies primarily to the eastern and southern regions, which were directly affected by hostilities. Because of the danger, many hotels in these regions have either completely ceased operations or reoriented themselves to provide shelter for displaced persons, military personnel, or volunteers.
Reorientation to the internal customer	In view of the significant reduction in foreign tourism, hotels began to work actively to attract domestic consumers. There is a reorientation to servicing forced migrants, state organizations, charitable and humanitarian organizations that temporarily need accommodation.
Moving business to the western regions	The western part of Ukraine, relatively safe compared to other regions, experienced an increased demand for hotel services. In particular, Lviv, Uzhhorod, Chernivtsi, and other western cities have become key centers for receiving migrants, international organizations, and diplomatic missions. Therefore, the demand for housing here increased, which made it possible for hotels to continue working even during the crisis period.
Adaptation to new needs	Hotels began to provide specific services related to supporting displaced persons and assisting volunteers. In some institutions, they began to convert rooms for long-term accommodation, create children’s rooms, and provide facilities for basic needs (food, medical care, etc.).
Problems with investment and business recovery	Investment in the hotel business has declined significantly due to instability and uncertainty about the future. Many projects for the development of new hotels have been frozen, and in regions where there are active hostilities, restoring the hotel infrastructure will require significant resources after the end of the war.
Challenges for hotels in big cities	The situation varies greatly in such cities as Kyiv, Odesa, or Kharkiv. In Kyiv, hotels operate in a limited mode, adapting to new conditions. Odesa remains popular with domestic tourists, but in the summer of 2023, the security situation in the Black Sea also affected the flow of visitors.

Table 3. The main challenges to the hotel business in Poland as a result of the war in Ukraine

Trends	Their essence
New challenges are the appearance of migrants from Ukraine	With the beginning of the full-scale invasion of the Russian Federation, Ukrainian migrants became a new challenge for Polish hotels. Many Polish institutions began to provide Ukrainians with free accommodation or significant discounts on it, which increased costs, required finding sources of financing, and changed the formats of service provision.
The presence of an armed conflict near the eastern border of Poland	The armed conflict near Poland’s eastern border has had a negative impact on the Polish tourism and hotel market to some extent. Some foreign tourists began to perceive Poland as a frontline country, fearing a potential threat, so they began to cancel planned trips.
Reorientation to new consumer segments	Not all Ukrainian migrants needed free help. Some, who had considerable funds, could organize their own accommodation. Many international companies with branches in Ukraine and some Ukrainian companies decided to move their employees and their families to Poland, paying for hotel accommodation. Therefore, an alternative segment of consumers of hotel services in Poland has become Ukrainians who, due to hostilities on the territory of Ukraine, were forced to leave their homes and seek refuge in safe territories. Accordingly, hotel occupancy in Poland increased due to migrants who chose Poland as a country of refuge or needed temporary accommodation during transit to other countries.

Based on the previous research, the study highlights the main challenges to the hotel business as a result of the war, which significantly affected its development (Table 2) (Andrews et al., 2023; Korolchuk, 2023; Kozłowski, 2023; Kulyk et al., 2024; Tank & Ospanova, 2022; National Tourism Organization of Ukraine, 2024; State Tourism Development Agency of Ukraine, 2023).

Based on the analysis of scientific sources (Andrews et al., 2023; Korzeniewski et al., 2024; Kulyk et al., 2024; Tank & Ospanova, 2022) and analytical studies (GUS, 2023; Hotel World, 2023), it follows that the war in Ukraine and the processes caused by it – significant migration flows, flows of transit passengers to airports – influenced the development of the hotel business in neighboring Poland (Table 3).

Therefore, the full-scale military invasion of the Russian Federation in Ukraine affected the development of the hotel business both in Ukraine and in neighboring Poland, and it began to adapt to new challenges.

One of the main operational indicators in the hotel business is the occupancy rate. During the analysis of the impact of the war on the occupancy of Ukrainian hotels, it was found that among respondents in Ukraine, the majority (57%) reported the average annual occupancy for 2022 from 25% to 50%. Among the respondents in Poland, 64% reported occupancy rates from 50% to 60%, and 23% of respondents – more than 70%. Therefore, the average occupancy rate of hotels in both countries increased as a whole – in Ukraine by 6% and in Poland by 13% (Figure 2).

The impact of migration flows of Ukrainian citizens on hotel occupancy is reflected by the share of Ukrainians who lived in hotels (Figure 3). The border regions of Poland and regions in the west of Ukraine turned out to be the leaders in terms of the number of Ukrainians in hotels. In 65% of Ukrainian hotels, the share of internally displaced persons was up to 10%; in 23% of hotels – 10-20%, and only in 12% of hotels, internally displaced persons constituted more than 20% of all residents.

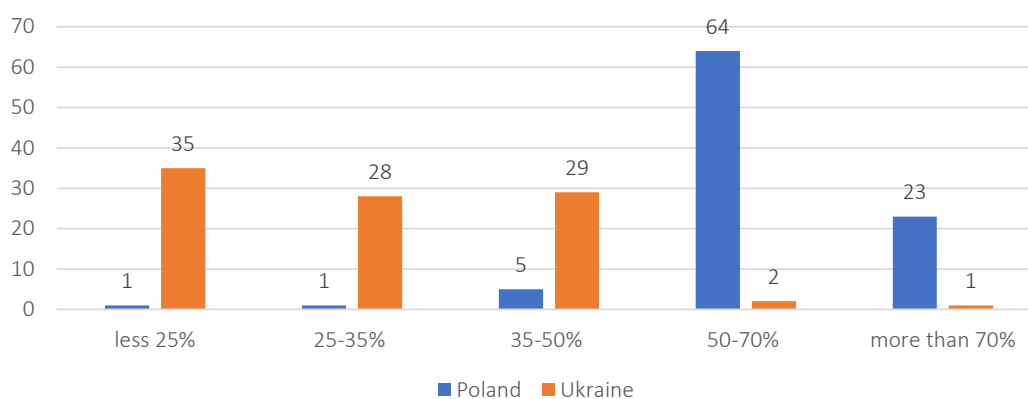


Figure 2. Occupancy rate of hotels in Poland and Ukraine, 2022, %

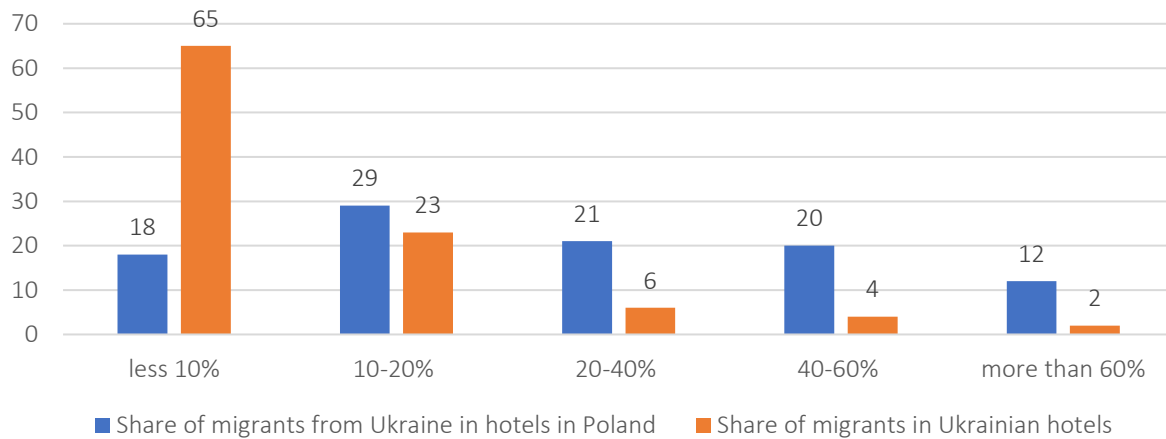


Figure 3. Specific weight of Ukrainian migrants/internally displaced persons who lived in hotels in Poland and Ukraine, 2022, %

In Poland, the situation is somewhat different. For 29% of hotels, the specific weight of Ukrainian migrants was 10-20%, for 21% of hotels – 20-40%, for 20% of hotels, the specific weight of migrants was even 40-60% of all residents, and for 12% of hotels, it was more than 60% (Figure 3).

Most hotels provided shelter and support to Ukrainian migrants and internally displaced persons in various formats (Figure 4).

Polish hotels provided almost twice as much assistance to Ukrainians. It included: providing discounts on meals at hotels – 65%, informational

support – 58%, assistance with transport – 52%, providing discounts on hotel accommodation – 50%, support in finding long-term housing – 43%, provision of free accommodation – 32% of hotels. Ukrainian hotels mostly provided informational support – 46% of hotels, support in finding long-term housing – 45%, help with transport – 36%, help in finding access to free food outside the hotel – 35%, providing discounts on food at the hotel – 32% and only 12% were accommodated for free.

According to official statistics, in 2022, Poland was granted €144.6 million by the European

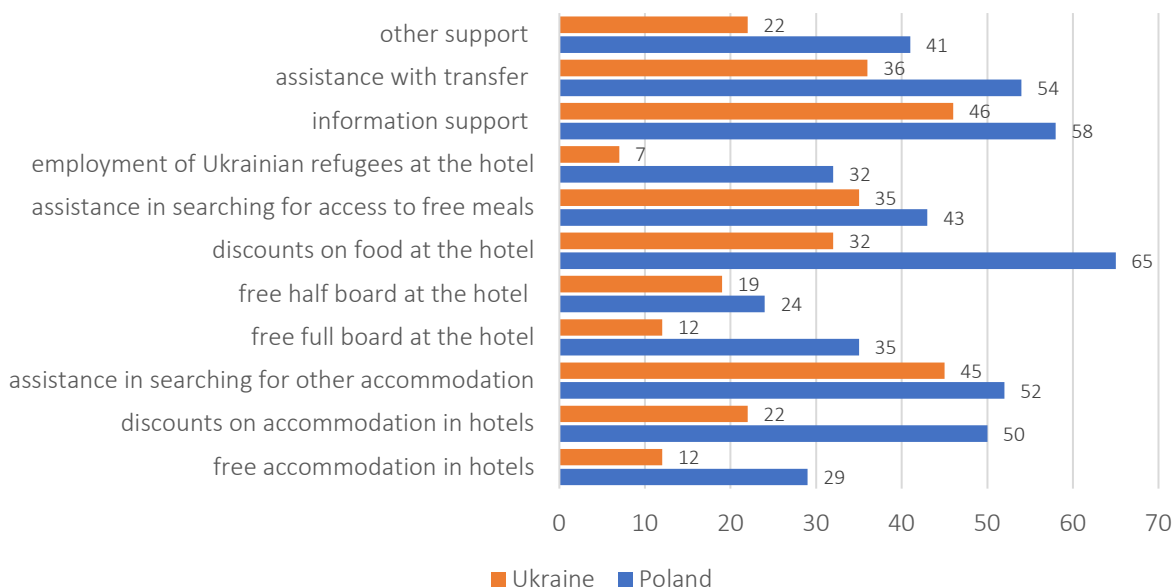


Figure 4. Areas of support for Ukrainian migrants/internally displaced persons by hotels in Poland and Ukraine, 2022

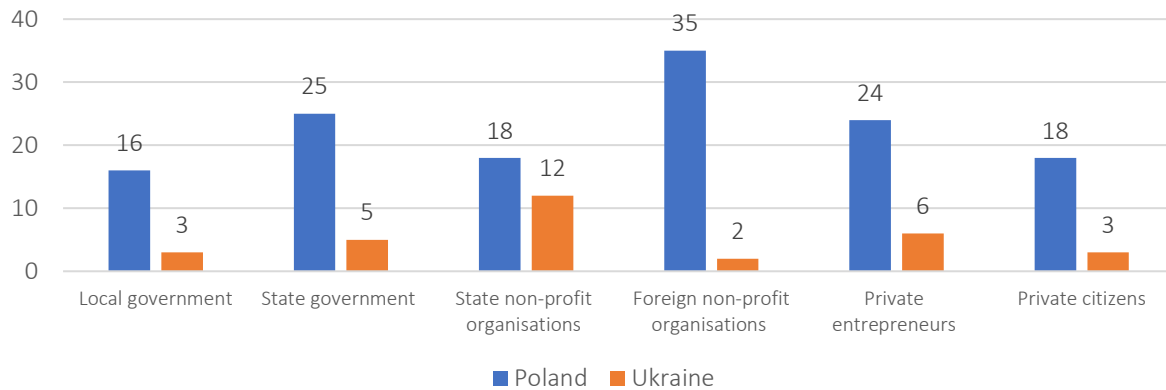


Figure 5. Sources of funding for Ukrainian migrants/internally displaced persons in hotels in Poland and Ukraine, %, 2022

Commission to help Ukrainian refugees as a result of the war with the Russian Federation. This was represented the first tranche of funds transferred by the EC via the emergency assistance mechanism. Part of the funds came from the Polish government’s fund for helping Ukrainian refugees and improving border security at the European Union’s external border. Some of these funds were provided to Polish hotels as external funding sources (Ministry of the Interior and Administration of Poland, 2022).

consider the level of subsidization to be sufficient and high; in Ukraine, this statement is shared by only 28% of respondents. The assessment of funding opportunities provides an understanding of how much the hotels’ strategy has changed and demonstrates the ability to adapt to new realities, which can lead to a more active search for possible compensatory mechanisms, as well as the need for support from international funds and local authorities. In Ukraine, the majority of hotels indicated the absence of external sources of financing, in Poland, the majority of respondents were informed and used the opportunities to receive compensation (Figure 5).

Consequently, hotels raised funds from other external entities to offset the costs of providing free or subsidized housing to internally displaced persons and migrants. The majority of hotels in Poland (68%)

35% of Polish hotels received funding from non-profit foreign organizations, 25% – from state au-

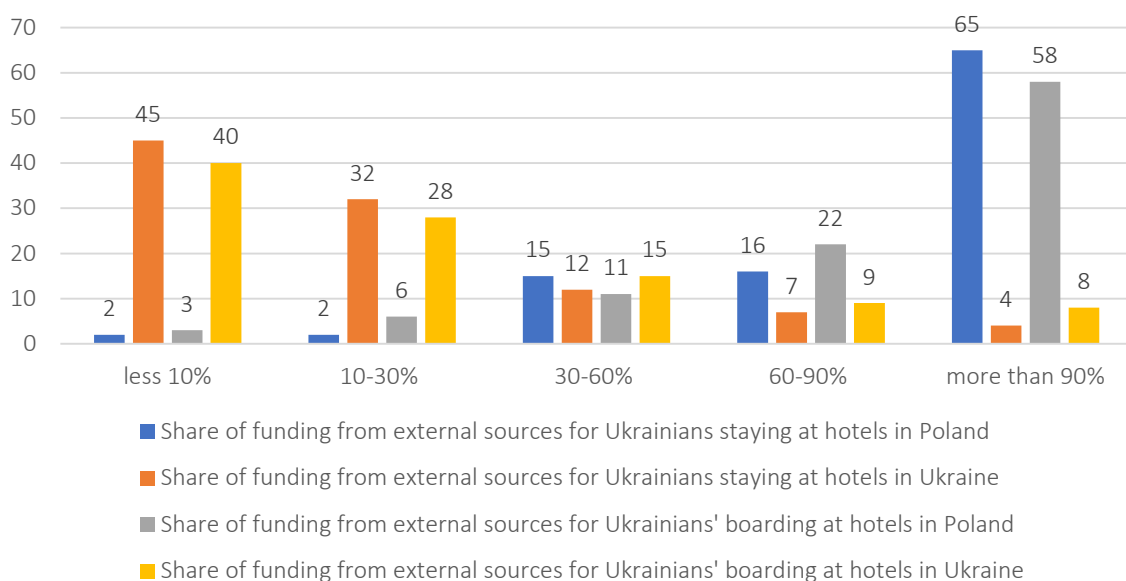


Figure 6. The share of funding from external sources on food and accommodation of Ukrainian migrants/internally displaced persons in hotels in Poland and Ukraine, %, 2022

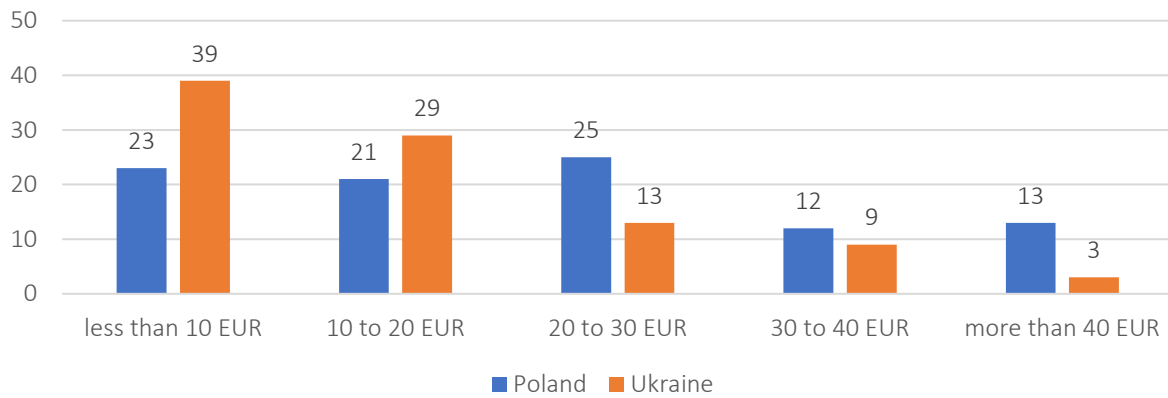


Figure 7. Distribution of the average amount of compensation for food and accommodation per Ukrainian migrant/internally displaced person per day in hotels in Poland and Ukraine, 2022

thorities, 24% – from private entrepreneurs, 18% from private individuals, and 16% from local authorities. In Ukraine, these indicators are much lower. Most, namely 12% of hoteliers, indicated that they received external financing from state non-profit organizations, 6% from private entrepreneurs, 5% from state authorities, 3% each from local authorities and private entrepreneurs, and only 2% are non-profit foreign organizations.

Figure 6 shows the share of funding from external sources to cover accommodation and food costs for Ukrainian migrants in hotels in Poland and Ukraine. In Poland, for many hotels, this indicator varies from 40 to 60%, and in Ukraine – from 10 to 30%. Moreover, in Poland, the specific weight of 90% of external financing covered the costs of accommodation in 65% of hotels and food in 58% of hotels. The share of compensation for accommodation and food expenses reflects the ability of hotels to attract external financing.

Hotels received compensation that partially or fully covered the costs of accommodation and food for migrants (on average, 72% of respondents in Poland and 21% in Ukraine). The situation with the amount of compensation in Ukraine is significantly different from the situation in Poland. The majority of Ukrainian hoteliers, namely 39%, answered that the amount of compensation per guest per day was less than 10 euros, which is typical for 23% of hotels in Poland. The majority of hoteliers in Poland received a larger amount of compensation: 25% – 20-30 euros per day and 21% – 10-20 euros, 12% – 30-40 euros, and even 13% – above 40 euros (Figure 7).

38% of hoteliers in Poland noted that Ukrainians stay in hotels free of charge for 30-90 days, 25% of hoteliers – about 7-30 days and more than 90 days. The average length of stay of Ukrainian refugees in hotels (79 days) is directly related to the “40+” compensation program, which provides support

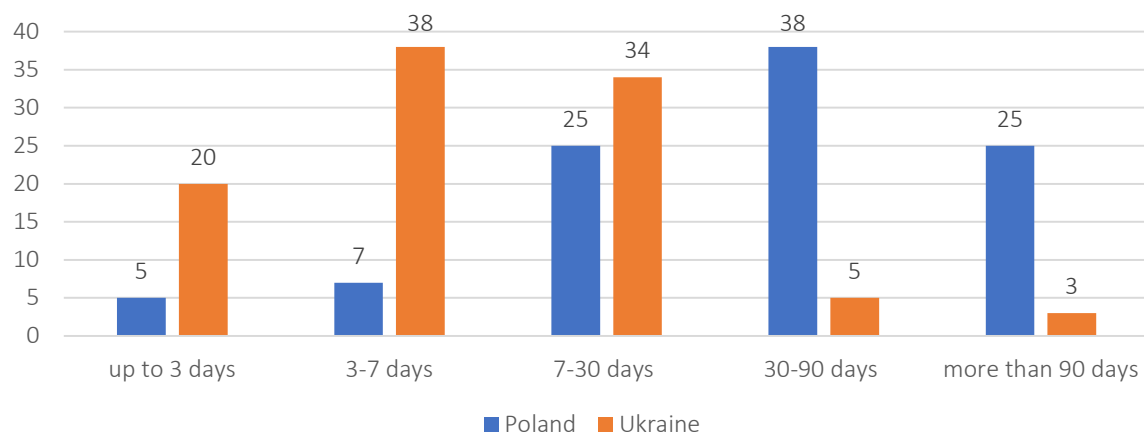


Figure 8. The average duration of unpaid stay of Ukrainian migrants/internally displaced persons in hotels in Poland and Ukraine, %, 2022

for hotel owners and reimbursement of expenses for 120 days. In Ukraine, the duration of unpaid stay of internally displaced persons is significantly shorter: 38% of hoteliers indicated that it is 3-7 days, 34% – 7-30 days, and 20% – up to 3 days (Figure 8).

Depending on the sources of funding, hotels decided either to host migrants or to find employment opportunities with partial compensation for hotel accommodation. More than 34% of the hotels employed Ukrainian migrants. Moreover, Ukrainians in Poland, even with accommodation and food support, are looking for employment opportunities in hotels, especially those located in

small cities or towns and they were given such an opportunity. In Ukraine, the percentage of hotels that employed Ukrainians – those who lived in hotels – is 2.8 times less than among Ukrainians in Poland.

Ukrainians who sought shelter in hotels in Poland are more likely to seek employment in the hotel business compared to Ukrainians living in hotels in Ukraine. Obviously, this is due to the fact that internally displaced persons in Ukraine have the opportunity to work remotely at the main place of work or are employed in the main specialty. The presence of external sources of funding for Ukrainians' accommodation and meals and the

Table 4. Areas for improvement of hotel business development in Ukraine and Poland during the war

Directions of development	Their detailed breakdown
Directions for improving the development of the hotel business in Ukraine	
Development of the segment of short-term accommodation for IDPs	Internally displaced persons need temporary accommodation, so hotels can adapt their services for short-term accommodation, offering flexible conditions (prices, rental periods) and simplified booking procedures
Integration of social support	Hotels can cooperate with government programs, non-governmental organizations, and charitable foundations to provide social assistance to internally displaced persons (for example, by providing housing on preferential terms). At the same time, it is important to inform about the possibilities of receiving grants and international funding
Innovative accommodation models	The use of new housing models, such as co-working spaces or joint housing projects (co-living), can help solve the problem of the lack of housing for IDPs
Improving security and infrastructure	Since war creates increased security requirements, hotels should pay special attention to the creation of shelters, as well as improving logistics and accessibility to basic infrastructure facilities (medical facilities, transport)
Focus on domestic tourism	To support business, it is necessary to develop offers for local tourists, in particular in relatively safe regions, which can serve as popular destinations for Ukrainians to relax
Directions for improving the development of the hotel business in Poland	
Adaptation to long-term migration	As many Ukrainian migrants stay in Poland for a long time, hotels should offer solutions for long-term stays, such as discounts for long-term rentals and additional services aimed at families with children
Creation of packages of services for migrants	Hotels can develop special support programs for Ukrainian migrants, including information packages on local services, legal assistance, employment counseling and educational opportunities
Involvement of additional sources of financing	Polish hotels can cooperate with the government and international organizations to receive subsidies or grants aimed at supporting housing programs for migrants
Development of cultural integration	Hotels can organize events that promote the integration of Ukrainian migrants into the local community, offering special entertainment programs, educational seminars or Polish language courses for migrants
Diversification of the client base	Hotels that previously focused mainly on tourists can adapt their services to new market segments, including migrant workers or people looking for permanent residence
Joint recommendations for improving the development of the hotel business in Ukraine and Poland	
Digitization of services	Active use of digital platforms for booking and communication with consumers, as well as the introduction of contactless services, can increase the convenience and safety of accommodation
Flexibility in personnel management	In view of the instability of the labor market, hotels should adapt the work models of the staff, offering flexible working conditions, professional development, and the possibility of retraining
Environmental sustainability	Hotels can take advantage of the opportunity to integrate environmental solutions, such as energy-efficient systems or reducing resource consumption, which can not only reduce costs but also meet the current trends of eco-tourism
Expansion of affiliate programs Socially responsible business	Cooperation with local and international partners to ensure stability and financial support (public organizations, government programs, donors)
Analysis of new consumer needs	Hotels need to constantly conduct market research to understand the needs of new categories of consumers and quickly respond to changes by offering appropriate services

opportunity for employment ensures additionally guaranteed occupancy of hotels and increased income in conditions of economic crises. Retraining programs and the demand for labor resources in the hotel business are fundamental to creating conditions for supporting refugees.

According to the survey, there is a certain increase in hotel occupancy in 2022 in both Ukraine and Poland, in particular, due to the accommodation of migrants/internally displaced persons in hotels. Out of the total number of guests, migrants from Ukraine accounted for almost 23% of the number of people who stayed in hotels in Poland and 12% of those who stayed in hotels in Ukraine in 2022. The growth in the number of visitors from Ukraine in 2022 also affected hotels of international chains. The number of hotels that provide support to Ukrainian refugees is higher in large cities such as Warsaw, Krakow, Wroclaw, and Gdansk in Poland and Kyiv, Lviv, Uzhhorod, and Chernivtsi in Ukraine.

The development of the tourist and hotel business of Ukraine in the conditions of war and in the post-war period requires a comprehensive approach, which includes crisis management, the introduction of innovations, digitalization, diversification of products and services, the creation of new safe tourist destinations, activation of domestic tourism, as well as the involvement of communities and international partners. Table 4 shows the generalization of conducted surveys (Pereira et al., 2022; Rastegar et al., 2023; Mazaraki et al., 2019; Okhrimenko et al., 2019) and suggests areas for improvement of hotel business development in both countries in the conditions of the war in Ukraine.

The main recommendations for improving the adaptation of the hotel business of Ukraine in the conditions of war and migration processes can include the development of the segment of short-term accommodation for IDPs, integration of social support, innovative models of accommodation, improvement of security and infrastructure, and focus on domestic tourism. For Poland: adaptation to long-term migration, creation of packages of services for migrants, attraction of additional sources of financing, development of cultural integration, and diversification of the cli-

ent base. Common recommendations for Ukraine and Poland are digitalization of services, flexibility in personnel management, environmental sustainability, expansion of partner programs, and analysis of new customer needs. Such recommendations will contribute not only to the survival of the hotel business but also to its development in new conditions, facilitating adaptation to new realities caused by war and migration processes.

4. DISCUSSION

Analyzing the impact of migration processes caused by the war on hotel operations, it is worth referring to the results of previous studies, which highlight changes in the demand for hotel and tourist services and business adaptation to new socio-economic conditions.

Some conclusions regarding the impact of the full-scale invasion of the Russian Federation into Ukraine on Polish travel agencies are quite unclear. Ahmad et al. (2024) note that migrants from Ukraine negatively affected the activities of Polish travel agencies: the number of tourists decreased, income fell sharply, and costs increased. Even at first glance, such conclusions do not correspond to logic: how can migrants affect the decrease in the number of consumers of Polish tourist operators? On the contrary, this number has increased. After all, a significant number of migrants from Ukraine are highly solvent; in particular, "about 70% of migrants have a higher education, and two-thirds previously worked in Ukraine" (UNHCR, 2022). Due to the lack of air traffic in Ukraine, most Ukrainians choose Polish airports for flights and services of Polish tour operators. Perhaps Ahmad et al. (2024) wanted to note that the number of foreign tourists to Poland decreased due to the neighborhood with a country where there is a war (Ukraine), but not due to migrant flows. Therefore, the conclusions in the mentioned article should apply to the Russian Federation, which initiates armed conflicts in neighboring countries, thereby affecting the reduction of tourist flows. On the contrary, the current survey of hotel managers in Poland reflects an increase in their occupancy level and, accordingly, income from the accommodation of migrants from Ukraine.

The findings are consistent with the conclusions of Andrews et al. (2023) and Korzeniewski et al. (2024), who discovered that a significant number of Ukrainian migrants did not negatively affect Polish social life; on the contrary, Ukrainians quickly integrated and entered the labor market, including the hospitality sector. The reason is that the vast majority of migrants are women who need to be employed in the service sector.

Another aspect of migration research is the study of the relationship between tourism, security and certain conflicts, in particular, armed conflicts, which lead to the emergence of migrant flows (Buda, 2016; Demir et al., 2019; Seyfi et al., 2023), as well as the negative impact of migrants on the development of tourism business, in particular, European countries under the influence of migrants from the Middle East and Africa (Zenker et al., 2018). Accordingly, the survey of 94 hotels in Poland proved the advantages obtained by the hotel business of Poland regarding the accommodation of Ukrainian migrants due to partial payment of services by the migrants themselves, compensatory financing of costs by international organizations, and the involvement of migrants to work in hotels.

For quite a long time, there has also been an issue with the interaction between tourists, the local population, and migrants involved in tourist services. In Hong Kong, Huang et al. (2024) concluded that the local population and tourists have a rather tolerant understanding of the problems of migrants, which makes direct conflicts impossible. In addition, migrant entrepreneurial initiatives often serve as a catalyst for global economic development, attracting social, economic, and human resources to stimulate innovation, create employment opportunities, and promote social cohesion in host communities (Cruz & Falcão, 2023). This

current study has reached similar conclusions as migration flows were found to stimulate the hotel business in both Ukraine and Poland to innovate, introduce new services, and attract migrants to employment. Therefore, under conditions of controllability and the implementation of appropriate measures, it is possible to minimize the negative impact of migration.

However, internal and external migration requires further study, monitoring, and development of the necessary solutions to promote the development of tourism and cultural diversity, improve the visa policy, form educational programs, and integrate migrants into local culture, creating unique tourism products that will attract tourists.

A separate, complex issue is the presence of a rather fine line between migration and forced tourism, which is characterized by the resettlement of people from dangerous regions to safer places due to a threat to life, health or loss of property. Unlike traditional (volunteer) tourism (which aims for cultural exchange and recreational interests), forced tourism is driven by violent circumstances, particularly armed conflicts, which force people to leave their homes in search of protection and safety. These questions require further thorough studies.

This study faced certain limitations due to the lack of official statistical data. During the war in Ukraine, the legislation bodies do not oblige economic entities to submit statistical reports to government agencies. This leads to a significant decrease in the volume and quality of official statistical information used in general to assess the economic situation in the country and the tourism and hotel industry in particular. As a result, one observes an insufficient generalized statistical base, which makes it difficult to monitor economic activity, compare results, and plan effectively.

CONCLUSION

This study aimed to identify and analyze changes in the activities of hotels in Ukraine and Poland caused by the internal displacements in Ukraine and migration to Poland due to the full-scale invasion of the Russian Federation. The study showed that migration processes have become crucial in changes in the hotel business in both countries. The average hotel occupancy rate in 2022 increased by 6% in Ukraine compared to the pre-war period, and by 13% in Poland due to the emergence of a new segment of consumers – migrants, whose share was 23% in Polish hotels and 12% in Ukrainian hotels. The increase in the share of

migrants in hotels shows that the migrant segment has grown significantly against the backdrop of a certain decline in other traditional segments of hotel consumers (tourists, business consumers), i.e., migrants have become an important factor in hotel occupancy when other segments do not show such growth.

Hotels have begun to introduce and provide new services. For example, Ukrainian hotels mostly provided information support and discounts, while Polish hotels, due to wider access to external financing, provided additional services, including free food, transportation, and employment. About 34% of Polish hotels employed Ukrainian migrants, which increased their economic sustainability.

The adaptation of Ukrainian and Polish hotels to the challenges associated with migration due to the war demonstrated the importance of flexibility and the ability of businesses to quickly attract external resources to support new consumer segments in crisis conditions. Areas of improvement may include expanding migrant employment programs in the hotel business, establishing long-term external financing systems to support hotels, and improving coordination between government, international, and private organizations for more effective crisis management. Such measures can contribute to increasing the economic sustainability and social responsibility of the hotel business.

AUTHOR CONTRIBUTIONS

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