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**CHARACTERISTIC OF THE CURRENT STATE OF THE MARKET  
OF HOTEL SERVICES IN KRASNOYARSK REGION**

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**Abstract.** The article is devoted to the analysis of the current state of the hotel market in the Krasnoyarsk region. Today the Krasnoyarsk region is a region of domestic tourism, almost 90% of the tourist flow in the region is formed by residents of the region and other regions of Russia. The degree of development of infrastructure and tourism industry differs significantly in the districts and cities of the region. The structure of the hotel market of the Krasnoyarsk region is represented mainly by chain hotels and private hotels. As a result of the analysis, it was found that, compared to 2019, in 2020, the total number of collective accommodation facilities in the Krasnoyarsk region decreased by 2.9%, the number of hotels decreased by 5.9%, the number of specialized accommodation facilities increased by 3.8%. The capacity indicator and the demand index of the hotel market of the Krasnoyarsk region indicate a steady growth until 2019 and stagnation in 2020, which corresponds to the general socio-economic situation in the Russian Federation. The revenues of the collective accommodation facility of the Krasnoyarsk region have constantly increased: in 2019 they increased by 23.6% compared to 2017 and decreased by 17.46% in 2020. Despite the negative socio-economic processes in the country and the world, the hotel market of the Krasnoyarsk region retains a significant potential for accelerating growth and strengthening its role in the development of the region's economy.

**Keywords:** hotel industry, Krasnoyarsk region, statistics, capacity indicator, demand index.

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**ХАРАКТЕРИСТИКА СОВРЕМЕННОГО СОСТОЯНИЯ РЫНКА  
ГОСТИНИЧНЫХ УСЛУГ КРАСНОЯРСКОГО КРАЯ**

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**Аннотация.** Статья посвящена анализу современного состояния гостиничного рынка Красноярского края. Сегодня Красноярский край является регионом внутреннего туризма, практически 90% туристского потока формируется здесь жителями края и других регионов России. Степень развития инфраструктуры и туристской индустрии существенно различается в районах и городах края. Структура гостиничного рынка Красноярского края представлена в основном сетевыми гостиницами и частными отелями. В результате проведенного анализа установлено, что, по сравнению с 2019 годом в 2020 году общее количество коллективных средств размещения в

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Красноярском крае уменьшилось на 2,9%, число гостиниц – на 5,9%, а количество специализированных средств размещения увеличилось на 3,8%. Показатель емкости и индекс спроса гостиничного рынка Красноярского края свидетельствуют о неуклонном росте до 2019 года и стагнации в 2020 году, что соответствует общей социально-экономической ситуации в РФ. Доходы коллективного средства размещения Красноярского края постоянно увеличивались: в 2019 году они выросли на 23,6% по сравнению с 2017 годом и снизились на 17,46% в 2020 году. Несмотря на негативные социально-экономические процессы в стране и мире, гостиничный рынок Красноярского края сохраняет значительный потенциал для ускорения темпов роста и усиления роли в развитии экономики региона.

**Ключевые слова:** гостиничная индустрия, Красноярский край, статистика, показатель емкости, индекс спроса.

**Introduction.** Domestic and foreign scientists note the growing role of the service sector in the national and global economy. The strategy for the development of tourism in Russia until 2035 provides, in particular, the formation of a tourist product, taking into account the natural, cultural, ethnic diversity of the regions of Russia [1]. The hotel market in the recent past was one of the largest sectors of the economy, the COVID-19 coronavirus pandemic has made significant changes to the usual rhythm of development of hotel enterprises. Today, governments around the world are looking for a balance between saving lives and saving economies.

The hotel industry actively influences the economy of the regions, the country as a whole, in particular the spheres of economic and social activities. The situation in Russia in the last decade is characterized by the development of the hotel industry, primarily in such large centers of the country as Moscow, St. Petersburg, Yekaterinburg, Novosibirsk, Vladivostok, Sochi and other cities with a population of 1 million or more people. International hotel chains such as Hilton Hotels Corporation, Marriott International and others are actively exploring the Russian market of hotel services in most regions of Russia. In turn, Russian hotel chains have appeared, expanding into the market in the CIS countries and abroad. The annual growth in the number of hotels in the Russian Federation until 2019 was 16-20% and totaled more than 28 thousand units in 2019.

Today the Krasnoyarsk region is a region of domestic tourism, almost 90% of the tourist flow in the region is formed by residents of the region and other regions of Russia [2]. The types of tourism that form significant tourist flows on the region of the Krasnoyarsk region are: active, cultural and educational, including social, children and amateur. The most promising types of tourism for the Krasnoyarsk region are the Arctic, river and health-improving. The number of organizations engaged in tourist activities in the Krasnoyarsk region in 2020 amounted to 296.

Collective accommodation facilities (hotels, hotels, mini-hotels) are concentrated in Krasnoyarsk, Norilsk, Yeniseisk, Kansk, Divnogorsk, Achinsk, Lesosibirsk, Minusinsk, Shushenskoye. Accommodation at tourist centers is mainly offered in Krasnoyarsk, Divnogorsk, Sharypovsky, Minusinsky, Ermakovsky, Berezovsky, Kuraginsky, Mansky and Yeniseisky districts.

There are sanatoriums and dispensaries in Krasnoyarsk, Balakhtinsky, Minusinsky, Uzhursky and Shushensky and other municipalities.

The degree of development of infrastructure and tourism industry differs significantly in the districts and cities of the region. In such territories with a steady tourist flow, such as Divnogorsk, Minusinsky, Ermakovsky, Sharypovsky, Shushensky and Taimyrsky Dolgano-Nenets municipal district, there is a significant shortage of tourist facilities (accommodation facilities, catering establishments, leisure and entertainment complexes, etc.) and supporting

infrastructure. Key tourist infrastructure facilities are located in Krasnoyarsk [3, 4]. The main objects of tourist attraction in the city of Krasnoyarsk include: the Yenisei River, the Stolby State Nature Reserve, the Royev Ruchey Krasnoyarsk Park of Flora and Fauna, the Bobrov Log Funpark, the Krasnoyarsk Hydroelectric Power Station, the Krasnoyarsk Regional Museum of Local Lore, the St. Nicholas Steamer Museum ", Pokrovsky Cathedral, etc. Krasnoyarsk has experience in holding the XXIX World Winter Universiade 2019 [3, 4].

**Materials and methods.** The analysis of the hotel services market in the Krasnoyarsk region was carried out in order to assess its development trends during a pandemic and post-pandemic, to analyze its capacity and market conditions. The object of the research was the hotel enterprises of the Krasnoyarsk region. The analysis of the hotel services market in the Krasnoyarsk region was carried out using the results of the authors' own research, the official data of the Kraistat [5]. In this case, the following methods were used: the observation method, the method of collecting information through purposeful and systematic perception and registration of factors and phenomena in natural conditions, the method of comparing two or more objects, highlighting the common and the different in them.

**Discussion.** The structure of the hotel market of the Krasnoyarsk region is represented mainly by chain hotels and private hotels. International chain hotels are mainly concentrated in the city of Krasnoyarsk: AMAKS Hotels & Resorts, Ibis Hotel, Novotel Hotels, Hilton Hotels & Resorts. Figure 1 presents quantitative data on accommodation facilities of all forms of ownership and some of their types in the Krasnoyarsk region in 2017-20. [5]. In the Krasnoyarsk region, there were 271 hotels with 13356 beds and 137 specialized accommodation facilities (health resort organizations, recreation organizations and tourist centers) with 21785 beds.

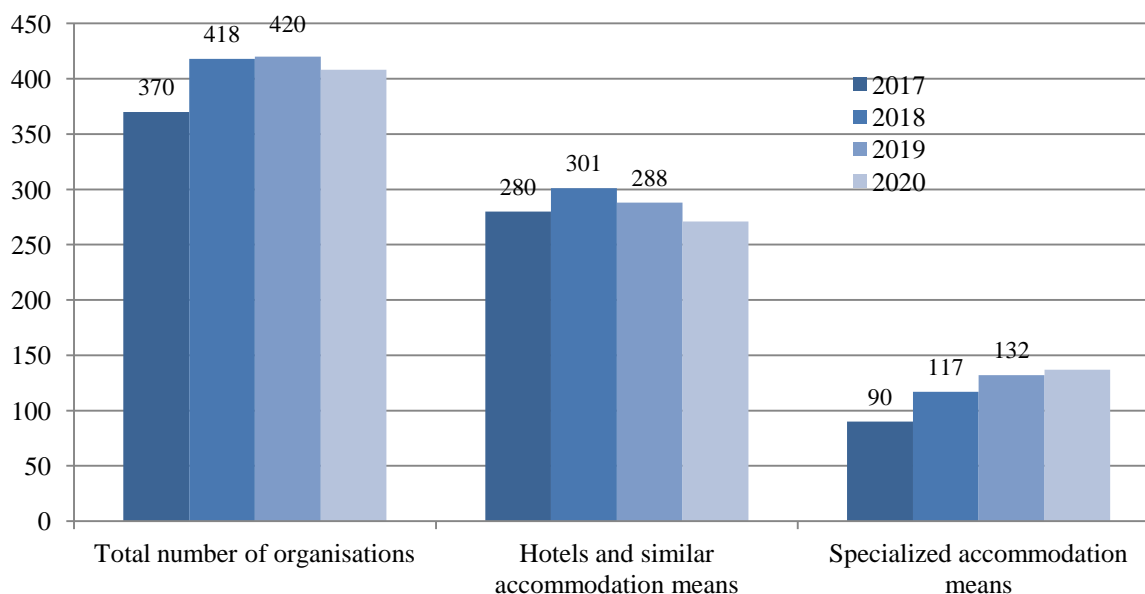


Figure 1. Dynamics of collective accommodation facilities of the Krasnoyarsk region, units

From the presented data, it can be seen that, compared to 2019, in 2020 the total number of collective accommodation facilities decreased by 2.9%, the number of hotels decreased by 5.9%, the number of specialized accommodation facilities (health resort organizations, recreation organizations, tourist camps ) increased by 3.8%. These data can be explained by the general downturn in the economy, restrictions in 2019-2020 associated with the pandemic, and an increase in demand for domestic tourism.

The number of persons placed in collective accommodation facilities in 2020 amounted to 538 thousand people (37.6% less than in 2019), including 395.6 thousand people in hotels and similar accommodation facilities (36.4% less than in 2019). The share of citizens of the Russian Federation who lived in collective accommodation facilities amounted to 98.1%, foreign citizens - 1.9%. In 2020, the main purposes of travel for persons staying in hotels and similar accommodation facilities were business and professional purposes (63.2% of the total number of accommodated persons), as well as vacation and leisure activities (22.6%).

Figure 2 shows data on the structure of specialized collective accommodation facilities in 2017-20 [5].

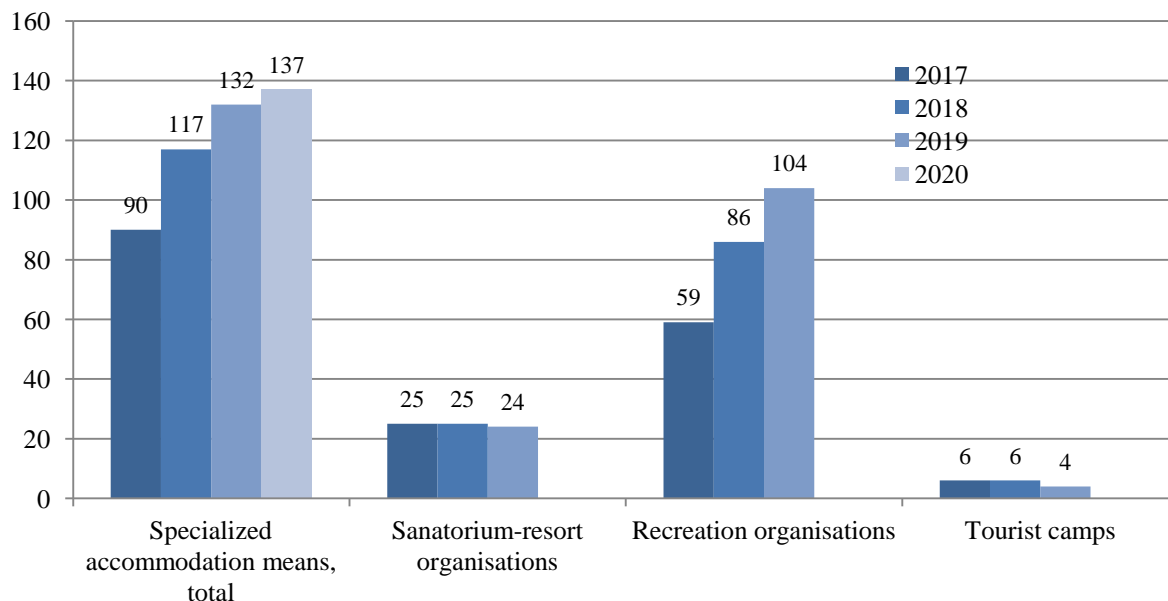


Figure 2. The structure of specialized collective accommodation facilities in the Krasnoyarsk region, units

The number of persons placed in specialized accommodation facilities in 2020 amounted to 142.4 thousand people (40.7% less than in 2019). In specialized collective accommodation facilities, the share of persons using their services for vacation, leisure and recreation was 66.2%, for business and professional purposes - 19.4%, for medical and health procedures - 12.6%.

Figure 3 shows the structure of sanatorium and resort organizations and recreation organizations of the Krasnoyarsk region in 2017-2019 [5]. From the presented data, it can be seen that the number of sanatorium and resort organizations remains at approximately the same level, except for such a category as recreation centers and camps. In 2019, their number increased by 87% compared to 2017.

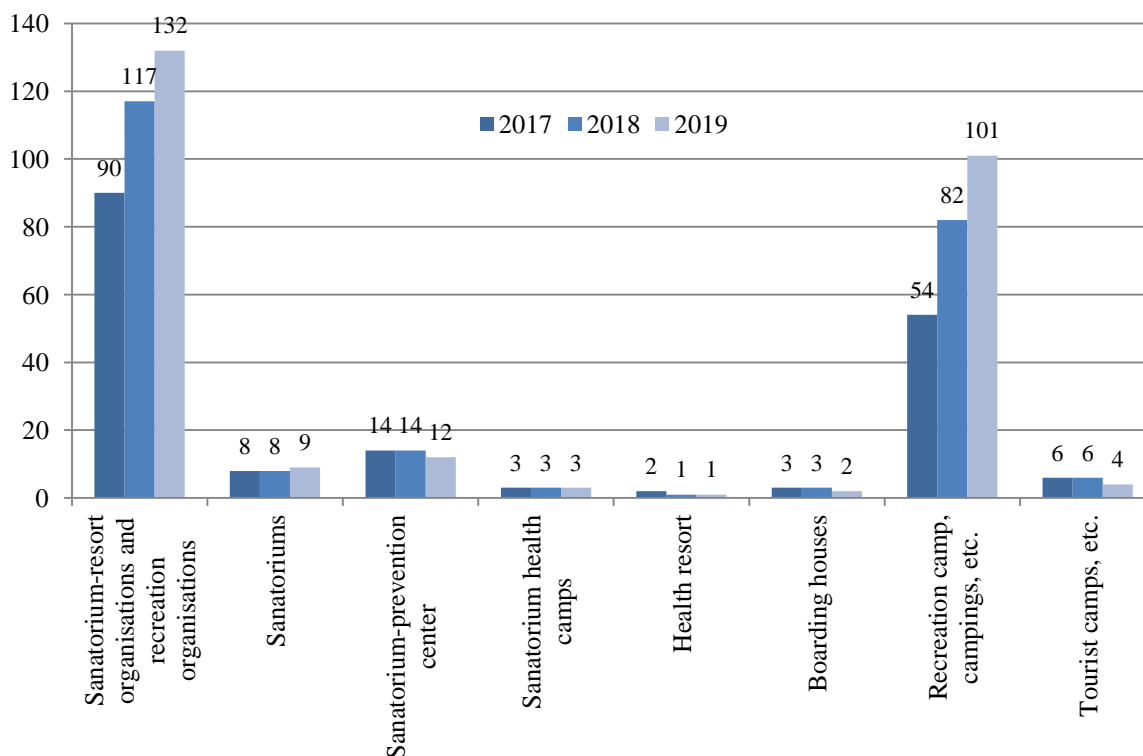


Figure 3. The structure of sanatorium and resort organizations and recreation organizations of the Krasnoyarsk region, units

Figure 4 shows the dynamics of the number of recreation organizations for children and their recovery in the Krasnoyarsk region in 2018-2020 [5].

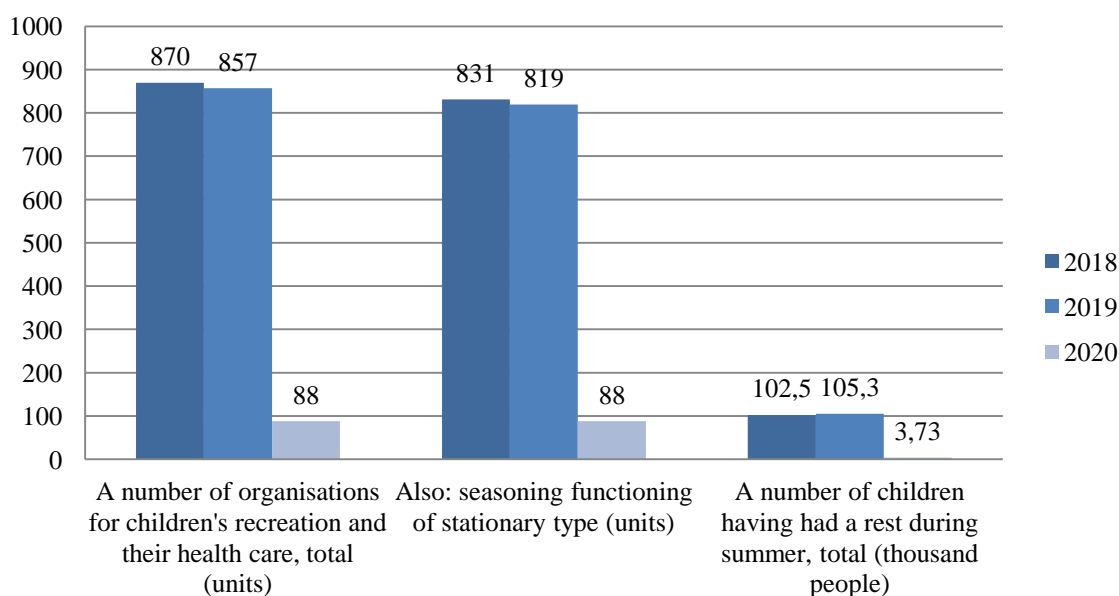


Figure 4. Dynamics of the number of organizations for the recreation of children and their recovery in the Krasnoyarsk region in 2018-2020

From the presented data, it can be seen that in 2020 there was a sharp decline in the number of organizations for the recreation of children and their recovery (by 89.3% compared to 2019), which is associated with the limitations of the pandemic.

Figure 5 shows the number of rooms in the collective accommodation facilities of the Krasnoyarsk region in 2017-2019 [5].

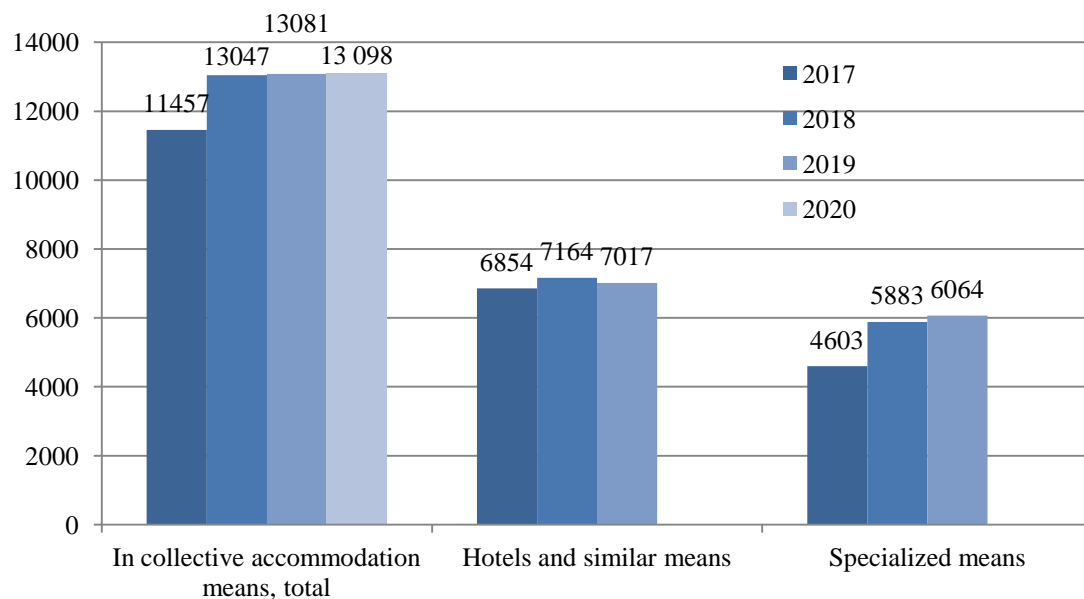


Figure 5. Number of rooms in collective accommodation facilities of the Krasnoyarsk region, units

Figure 6 shows the number of places in the collective accommodation facilities of the Krasnoyarsk region in 2017-2019 [5].

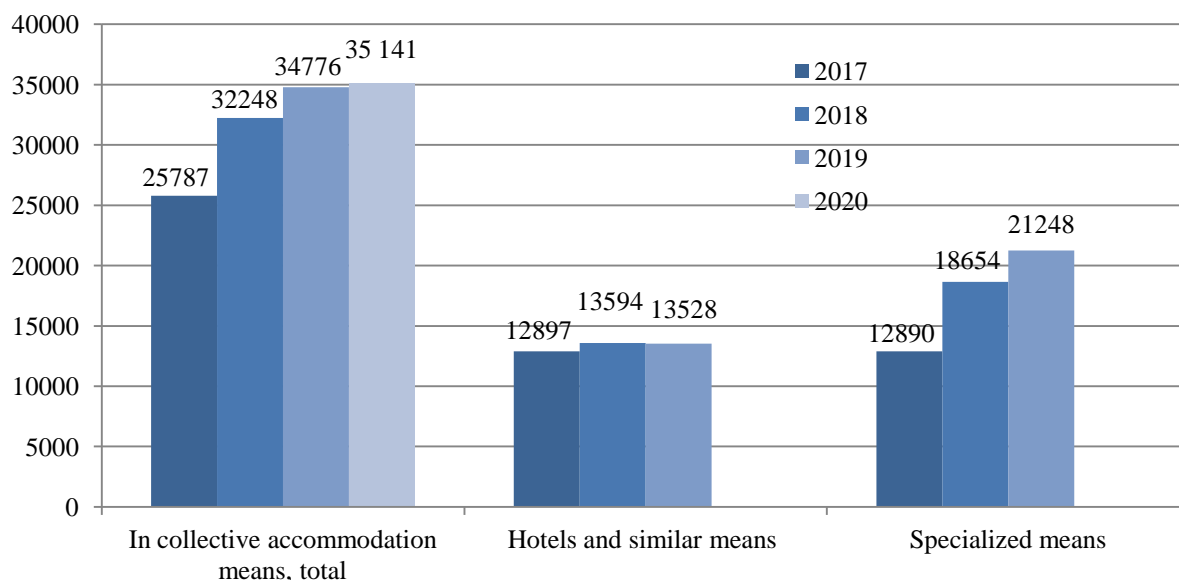


Figure 6. Number of places in collective accommodation facilities of the Krasnoyarsk region, units

From the data presented, it can be seen that the number of rooms in collective accommodation facilities of the Krasnoyarsk region remains approximately at the same level, while the number of places increased by 8.9% in 2020 compared to 2018 (most of them are specialized accommodation facilities).

One of the main objectives of the hotel market research is to determine its capacity. The indicator of the capacity of the consumer market of hotel services in the Krasnoyarsk region is determined by the total amount of inventory hotel rooms of all hotels during the year. The value of the capacity indicator of the hotel market of the Krasnoyarsk region 2017-2020 shown in Figure 7.

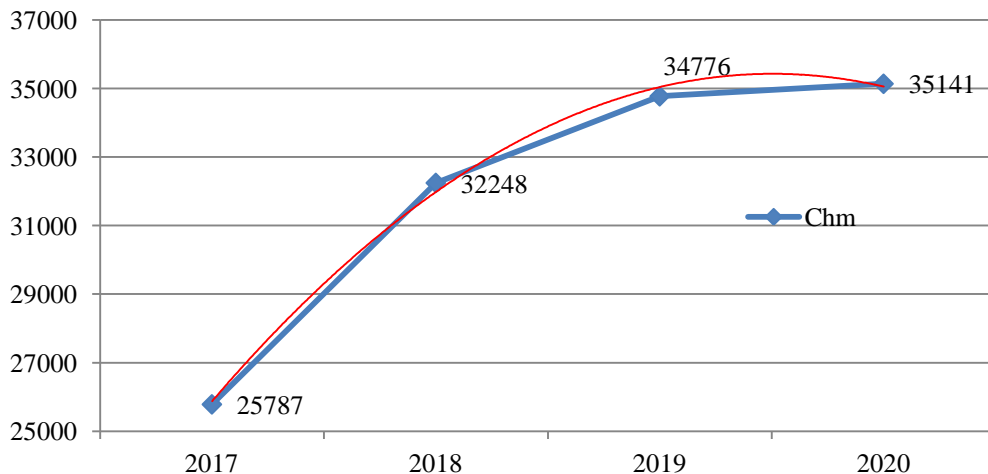


Figure 7. Change in the capacity indicator of the hotel market of the Krasnoyarsk region 2017-2020

The indicator of the capacity of the hotel market of the Krasnoyarsk region indicates a steady growth until 2019 and stagnation in 2020, which corresponds to the general situation in the Russian Federation. Capacity of the demanded part of the hotel services market of the Krasnoyarsk region (+C<sub>hm</sub>):

$$\begin{aligned}
 +C_{hm\ 2017} &= 2753117 \\
 +C_{hm\ 2018} &= 3123472 \\
 +C_{hm\ 2019} &= 3520570 \\
 +C_{hm\ 2020} &= 2080994
 \end{aligned}$$

The capacity of the unclaimed part of the hotel services market of the Krasnoyarsk region (-C<sub>hm</sub>):

$$\begin{aligned}
 -C_{hm\ 2017} &= 6530203 \\
 -C_{hm\ 2018} &= 8485808 \\
 -C_{hm\ 2019} &= 8998790 \\
 -C_{hm\ 2020} &= 10569766
 \end{aligned}$$

Demand index (DI):

$$\begin{aligned}
 DI+_{2017} &= 0.30 & DI-_{2017} &= 0.70 \\
 DI+_{2018} &= 0.27 & DI-_{2018} &= 0.73 \\
 DI+_{2019} &= 0.28 & DI-_{2019} &= 0.72 \\
 DI+_{2020} &= 0.16 & DI-_{2020} &= 0.84
 \end{aligned}$$

The obtained indicators characterize the state of the hotel market in the Krasnoyarsk region. A significant fluctuation in the demand for hotel services should be noted, especially due to the downturn in business activity due to the pandemic (Figure 8).

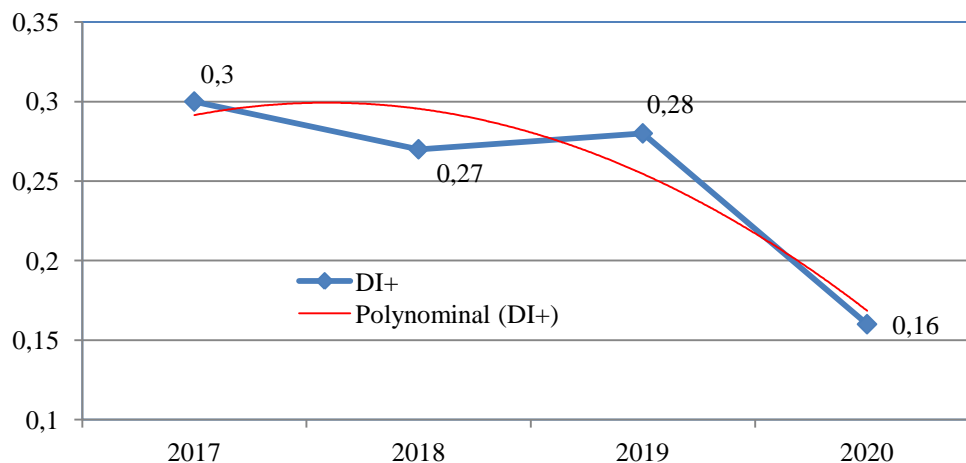


Figure 8. Change in the demand index of the hotel market of the Krasnoyarsk region in 2017-2020

The income of collective accommodation facilities from the services provided excluding VAT, excise taxes and similar payments of the Krasnoyarsk region are shown in Figure 9 [5].

The revenues of the collective accommodation facility of the Krasnoyarsk region have constantly increased: in 2019 they increased by 23.6% compared to 2017 and decreased by 17.46% in 2020.

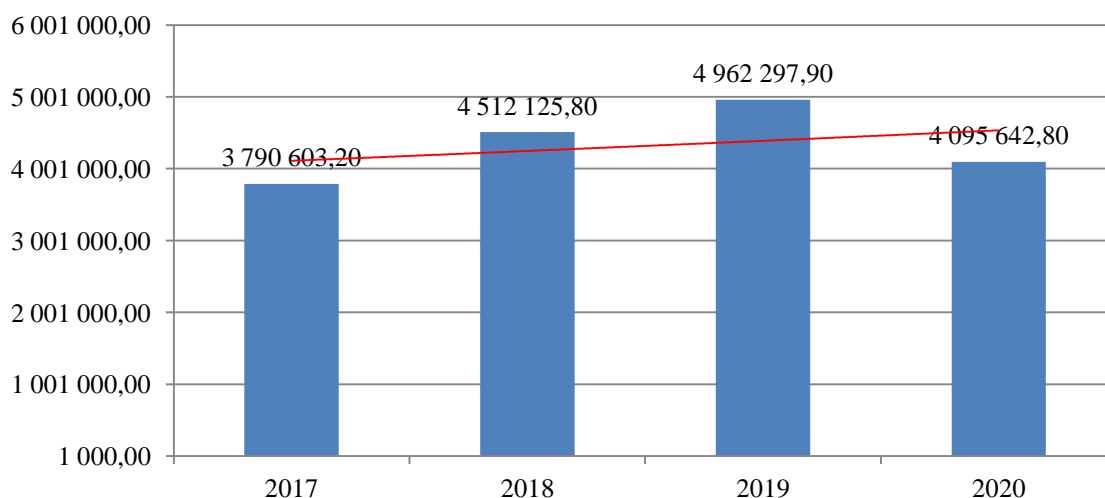


Figure 9. Income of collective accommodation facilities of the Krasnoyarsk region from services provided, excluding VAT, excise taxes and similar payments (thousand rubles)

The offer of hotel services in the Krasnoyarsk region is characterized by a variety of types of accommodation facilities, price parameters, and the level of quality of services offered.

So, we can single out a number of main problems faced by the hotels of the Krasnoyarsk region: hotels have a low occupancy factor, despite the large volume of unoccupied rooms, there is a shortage of tourist infrastructure that meets the consumer expectations of tourists focused on the international level of service.

**Results.** As a result of the analysis, it can be concluded that, compared to 2019, in 2020 the total number of collective accommodation facilities in the Krasnoyarsk region decreased by 2.9%, the number of hotels decreased by 5.9%, the number of specialized



accommodation facilities increased by 3.8 %. The capacity indicator and the demand index of the hotel market of the Krasnoyarsk region indicate a steady growth until 2019 and stagnation in 2020, which corresponds to the general socio-economic situation in the Russian Federation. The revenues of the collective accommodation facility of the Krasnoyarsk region have constantly increased: in 2019 they increased by 23.6% compared to 2017 and decreased by 17.46% in 2020.

**Conclusions.** Despite the negative socio-economic processes in the country and the world, the hotel market of the Krasnoyarsk region retains a significant potential for accelerating growth and strengthening its role in the development of the region's economy. Small and medium-sized businesses play an important role in the development of the hotel market. Thanks to the efforts of government authorities, all-Russian non-profit organizations expressing the interests of entrepreneurs, as well as development institutions for the implementation of support measures, favorable conditions are created for the development of small and medium-sized businesses in the field of hospitality.

It is necessary to further increase the availability of tourist products for residents of the region and stimulate motivation to travel, including through the development of social tourism and import substitution in the domestic market, the development of child and youth tourism, social adaptation and the formation of respect for the cultural and religious diversity of Krasnoyarsk region and RF are of the greatest importance.

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