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INNOVATIVE STRATEGIES AND TRIGGERS FOR THE DEVELOPMENT OF THE TOURISM AND HOTEL-RESTAURANT BUSINESS IN CRISIS CONDITIONS

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**ІННОВАЦІЙНІ СТРАТЕГІЇ ТА ТРИГЕРИ РОЗВИТКУ ТУРИСТИЧНОГО
ТА ГОТЕЛЬНО-РЕСТОРАННОГО БІЗНЕСУ В УМОВАХ КРИЗИ**

In the tourism and hotel-restaurant business, like many other industries, there has been a significant economic crisis, largely driven by the consequences of the Russian invasion of Ukraine. During this period, the crisis has manifested through a decrease in international tourism, a reluctance of domestic tourists to visit certain regions of the country, reduced investments, and development. Additionally, domestic hotels and restaurants located in these areas are facing a significant decrease in the number of customers. The new operating conditions for the tourism and hotel-restaurant business are challenging, but they can also create new opportunities that can be shaped through the implementation of innovative strategies and the incorporation of development triggers. Therefore, the aim of this article is to identify the diversity and characteristics of forming innovative strategies and development triggers for the tourism and hotel-restaurant business in crisis conditions. Based on the research results, it has been proven that the conditions of the current economic crisis require the implementation of protective innovative development strategies for the tourism and hotel-restaurant business. In this regard, an analysis of domestic experience has allowed us to identify a pool of 5 key protective innovation strategies currently used for the development of the tourism and hotel-restaurant business in crisis conditions. These strategies include retaining loyal customers, optimizing enterprise costs, attracting the local market, diversifying services, and collaborating with local partners. It has been demonstrated that each of the protective innovation strategies identified above is selected based on the needs of the tourism and hotel-restaurant business, its conditions, and its operation. Furthermore, considering the importance of continuous improvement and updates, it is crucial to incorporate innovative triggers into such strategies. Specifically, each trigger of protective innovation strategies for the development of the tourism and hotel-restaurant business operates according to the following scheme: observation and analysis; identification of opportunities; strategy development; initiative launch; monitoring and evaluation; and internal transformations. This outlined scheme is iterative and requires constant refinement and adaptation to environmental changes.

У сфері туристичного та готельно-ресторанного бізнесу, подібно до багатьох інших галузей, спостерігається розгортання масштабної економічної кризи, спричиненої наслідками Російського вторгнення в Україну. Зокрема, проявами кризи в цей період є зменшення обсягів зовнішнього туризму та відмова внутрішніх туристів від відвідування певних регіонів країни, зменшення інвестицій і розвитку. Крім того, вітчизняні готелі та ресторани, розташовані в цих областях, стикаються зі значним зменшенням кількості клієнтів. Нові умови функціонування туристичного та готельно-ресторанного бізнесу є складними, але вони також можуть створити нові можливості, які можуть реалізовуватися за допомогою інноваційних стратегій та вбудованих у них розвивальних факторів. Отже, метою цієї статті є визначення різноманітності та особливостей формування інноваційних стратегій та факторів розвитку туристичного та готельно-ресторанного бізнесу в умовах кризи. За результатами дослідження доведено, що сучасні умови економічної кризи вимагають від туристичного та готельно-ресторанного бізнесу впровадження захисних інноваційних стратегій розвитку. При цьому аналіз вітчизняного досвіду дозволив виділити п'ять ключових захисних інноваційних стратегій, які в даний момент використовуються для розвитку туристичного та готельно-ресторанного бізнесу в умовах кризи. Серед них варто виділити збереження лояльних клієнтів, оптимізацію витрат підприємства, залучення місцевого ринку, диверсифікацію послуг та співпрацю з місцевими партнерами. Доведено, що кожна із раніше визначених захисних інноваційних стратегій вибирається відповідно до потреб туристичного та готельно-ресторанного бізнесу, а також умов і особливостей його функціонування. З огляду на важливість постійного вдосконалення та оновлення, ключовим є вбудовування в ці стратегії інноваційних тригерів. Специфічним є те, що кожний такий тригер захисних інноваційних стратегій розвитку туристичного та готельно-ресторанного бізнесу працює за наступною схемою: спостереження та аналіз, виявлення можливостей, розробка стратегії, запуск ініціатив, моніторинг і оцінка, внутрішні трансформації.

Зазначена схема є ітеративною і вимагає постійного вдосконалення та адаптації до змін у середовищі.

Keywords: *cost optimization; development strategies; development triggers; economic crisis; local market.*

Ключові слова: *оптимізація витрат; стратегії розвитку; тригери розвитку; економічна криза; місцевий ринок.*

Target setting. In the field of tourism and hotel-restaurant business, like many other industries, there is currently an unfolding of a large-scale economic crisis. This crisis is a result of the Russian invasion of Ukraine. Specifically, manifestations of the crisis during this period include a reduction in international tourism volumes and domestic tourists refraining from visiting certain regions within the country, decreased investments, and development. Additionally, domestic hotels and restaurants located in these areas are facing a significant decrease in the number of customers. The new operating conditions for the tourism and hospitality business are challenging, but they can also create new opportunities that may be shaped through the application of innovative strategies and embedded development triggers.

Analysis of research and publications. The research on contemporary issues in the development of the tourism and hotel-restaurant business is being conducted by leading scholars such as Tserklevych V., Dil A., Dil M., Maslyhan, O., Todierishko, E., Zhukov, S. and Kashka, M., and others. However, as of today, there is a lack of a systematic approach towards further investigating the issues related to the formation of innovative strategies and development triggers for these businesses in the defined context.

The wording of the purposes of article (problem). The purpose of the article is to identify the diversity and characteristics of forming innovative strategies and development triggers for the tourism and hotel-restaurant business in the context of a crisis.

The paper main body with full reasoning of academic results. It should be noted that the conditions of the contemporary economic crisis (which have been shaped by the consequences of Russian aggression, and uncertainties surrounding ongoing reforms in various sectors, including the budget, pension, and tax systems) require the tourism and hotel-restaurant businesses to implement defensive innovative development strategies.

These strategies are employed by business entities to protect their competitive advantages and market positions by implementing new innovative solutions or improving existing ones to adapt to new conditions and maintain their viability. Analysis of domestic experience has allowed us to identify a pool of 5 key defensive innovative strategies currently being employed for the development of the tourism and hotel-restaurant business in times of crisis (Table 1), including retaining loyal customers, optimizing enterprise costs, engaging the local market, diversifying services, and collaborating with local partners.

Table 1. The experience of applying defensive innovative strategies for the development of the tourism and hotel-restaurant business as of 2023

Business entities	Innovative strategies applied				
	retaining loyal customers	optimizing enterprise costs	engaging the local market	diversifying services	collaborating with local partners
Join UP!	+	-	-	-	-
Argentina Grill	-	-	-	-	+
Mr. & Mrs. Meat	-	-	+	-	-
Eastman	-	-	-	-	-
Puri Chveni	-	+	-	-	-
Anex	-	-	+	-	-
TEZ Tour	-	-	-	+	-

Source: formed according to economic entities data

Let's consider in detail a pool of 5 key protective innovative strategies in detail. Specifically:

1. The strategy of retaining loyal customers is aimed at adapting to new conditions by maintaining and attracting loyal customers who can be crucial for ensuring a sustainable revenue stream during a crisis. To achieve this, innovative loyalty

- programs, personalized approaches to customers, customized offers, and customer engagement through digital technologies should be implemented [5].
2. The strategy of enterprise cost optimization is aimed at adapting to new conditions by optimizing costs through the implementation of innovative ideas and technologies to reduce expenses and increase operational efficiency [5].
 3. The strategy of engaging the local market is focused on utilizing innovative approaches and technologies to create attractive offerings for residents and draw them into the tourism and hotel-restaurant business. To achieve this, special offers for residents and an active marketing campaign targeted at the local market should be implemented [2].
 4. The strategy of service diversification is aimed at implementing innovative ideas and technologies to create unique and modern services that align with evolving needs and circumstances. To achieve this, innovative technologies such as online tours or remote workplaces for employees can be utilized.
 5. The strategy of collaborating with local partners is aimed at utilizing innovative approaches and technologies to enhance cooperation and create unique offerings for customers [1].

Each of the defensive innovative strategies is selected based on the needs of the tourism and hotel-restaurant businesses and the conditions in which they operate. Moreover, considering the importance of continually improving and updating the innovative strategy, it is crucial to embed triggers (or mechanisms that timely initiate or facilitate internal transformations) within them. What is specific is that each such trigger operates according to the following scheme [5]: 1) observation and analysis; 2) identification of opportunities; 3) strategy development; 4) initiation of initiatives (implementation of internal and external initiatives that align with the defensive innovative strategy); 4) monitoring and evaluation (continuous monitoring of their results and effectiveness); 5) internal transformations (changes that ensure sustainable competitiveness and future success). It is important to understand that this outlined scheme is iterative and requires constant refinement and adaptation to changes in the environment.

So, a defensive innovation strategy focused on retaining loyal customers should align with triggers for the promotion and implementation of ideas, products, and services, including the following (Figure 1):

- 1) personalized services; mobile apps and online platforms.
- 2) blockchain-based loyalty programs.
- 3) virtual tours and experiences.
- 4) the art of guest service.
- 5) environmental responsibility.
- 6) automated services.

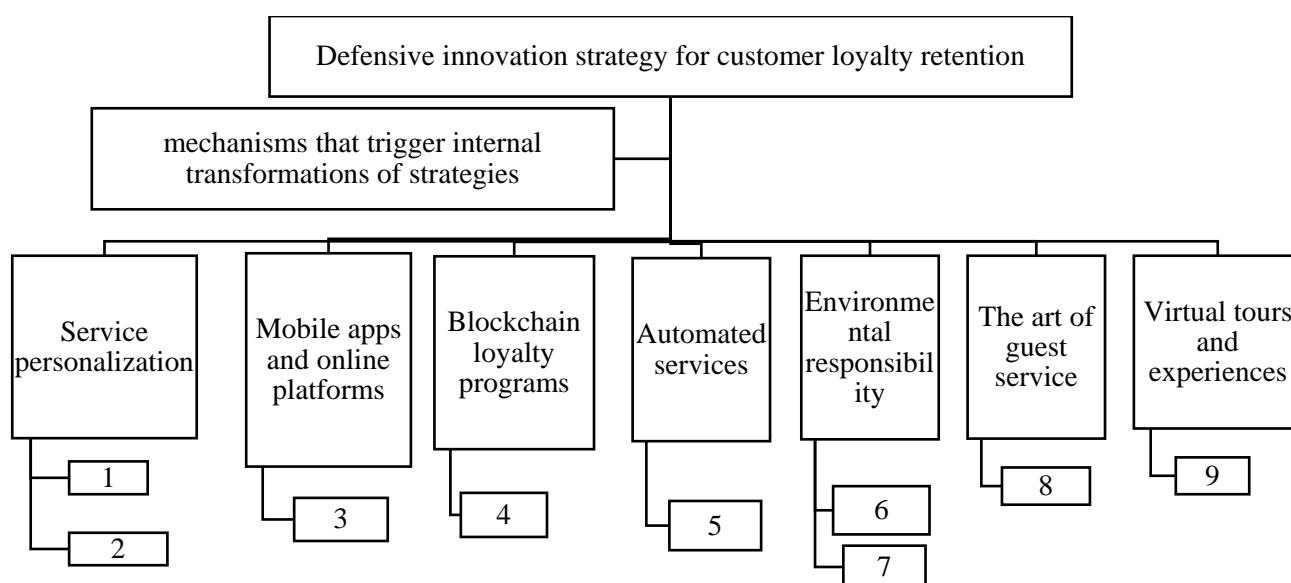


Figure 1. Triggers of the defensive innovation strategy for retaining customer loyalty in the enterprise

Note

*(1) Utilizing artificial intelligence and data analytics for collecting and analyzing customer information; (2) Providing customers with personalized offers and services tailored to their needs and preferences; (3) Using and enhancing mobile applications or online platforms for customer interaction; (4) Leveraging blockchain technology to create reliable and transparent loyalty programs, allowing customers to store and exchange bonus points for travel; (5) Applying virtual reality or augmented reality to create unique virtual tours, experiences, and journeys for customers who cannot physically visit your location; (6) Adhering to environmentally friendly practices; (7) Innovative resource conservation and environmental protection practices; (8) Innovative training programs for staff that enhance customer interaction skills and create memorable experiences; (9) Employing robots and artificial intelligence systems to automate routine tasks and improve service quality.

Source: formed based on [1; 3]

The triggers of the innovative strategy aimed at retaining loyal customers help create unique and modern experiences for customers, ensuring safety and enhancing convenience in their interactions with the business.

The defensive innovation strategy for optimizing business expenses should focus on digitalization triggers, including (Figure 2):

- 1) Internet Things use.
- 2) Data analytics.
- 3) Energy efficiency.
- 4) Continuous monitoring and support.
- 5) Electronic inventory management (practices for effective inventory control and optimization of inventory levels, distribution, and reorganization [5]).
- 6) Autonomous robotics and artificial intelligence (practices oriented towards various technological components that can be used to enhance efficiency and optimization of various aspects of the business [1]).
- 7) Waste management.

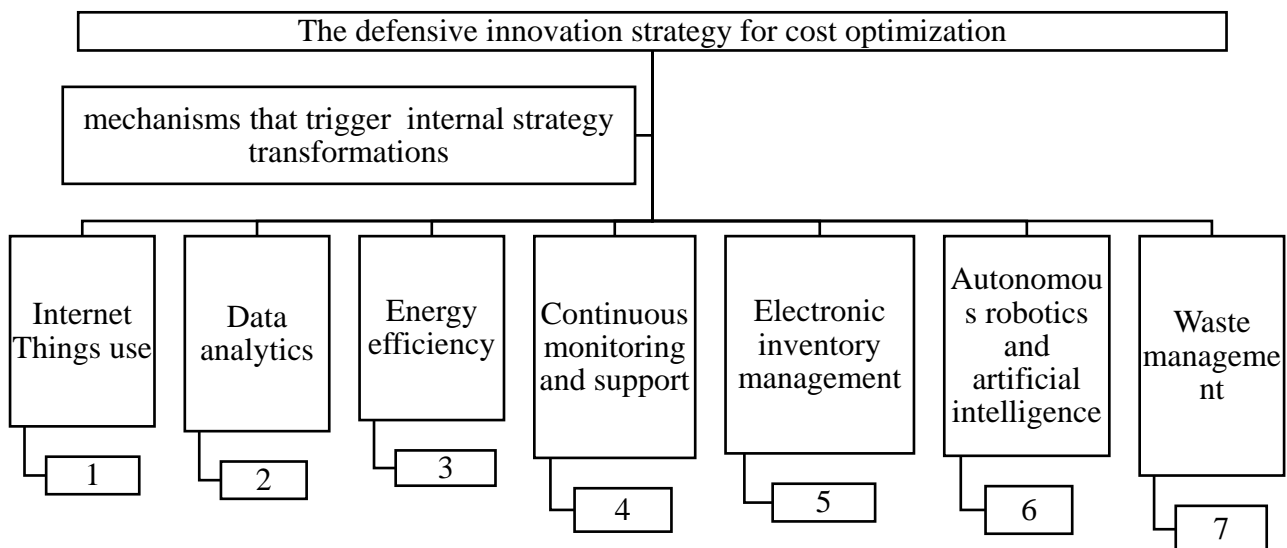


Figure 2. The triggers for the defensive innovation strategy of enterprise cost optimization

Note

*(1) Using monitoring and management systems for various hotel and restaurant facilities such as lighting, air conditioning, security systems, and others; (2) Utilizing these systems for cost optimization, improved efficiency, and process rationalization; (3) Reducing energy consumption is a key factor in cost optimization; (4) Implementing continuous monitoring systems that enable the timely detection of issues and regular maintenance, reducing expenses on equipment repair and maintenance; (5) Employing electronic inventory management systems to avoid overstocking and reduce losses from obsolete or unsold goods; (6) Utilizing autonomous robots and artificial intelligence to enhance customer service efficiency and processes in hotels and restaurants; (7) Reducing waste and implementing recycling programs can lower waste disposal costs and recover resources.

Source: formed based on [1; 5]

By implementing the highlighted innovative triggers mentioned above, businesses can assist enterprises in the tourism and hotel-restaurant industry in reducing costs and ensuring stability in challenging economic conditions.

The defensive innovation strategy for engaging the local market should focus on localization triggers, including (Figure 3):

- 1) Mobile applications and online platforms (practices involving flexible software or websites designed for use on mobile devices (smartphones and tablets) or in an online environment, providing various functional capabilities to users [5]).
- 2) Exclusive events and things (the practice of organizing special events or gatherings intended for a limited audience and available only to selected participants [1]).
- 3) Loyalty programs for locals (practices aimed at attracting and retaining customers who reside or work in a specific region or locality [5]),
- 4) Environmental responsibility,
- 5) Marketing campaigns,
- 6) Cultural integration.

By applying the content of the highlighted innovation triggers mentioned above, businesses in the tourism and hotel-restaurant industry can successfully adapt to changes in consumer habits and local market demand during an economic crisis.

The protective innovation strategy for diversifying services should focus on triggers for diversification, such as (Figure 4):

- 1) online tours and virtual travels; remote workplaces (practices where employees work not in the office or a physical company location but perform their duties from their own place of residence or any other location that suits their needs and capabilities [3]).
- 2) virtual events and conferences (practices where events take place in an online environment where participants can participate remotely using computers, smartphones, or other devices [1; 5]).
- 3) delivery and courier services.
- 4) special dietary and dietary restrictions.
- 5) expanded entertainment.

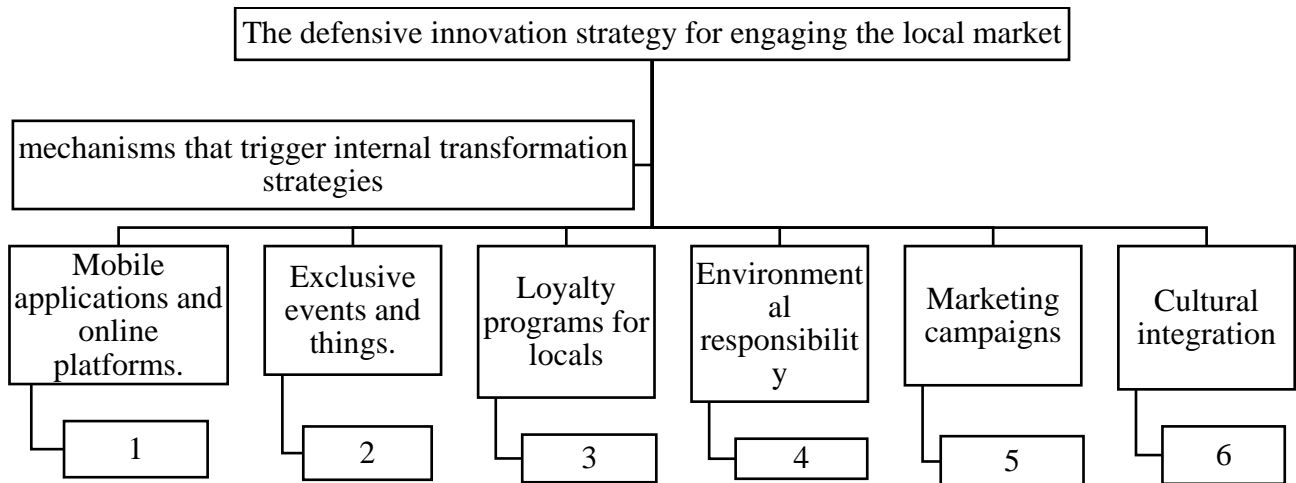


Figure 3. The triggers for the defensive innovation strategy of a business for engaging the local market

Note

* (1) Mobile applications or online platforms that provide local residents with a convenient way to browse and book services in your business; (2) Organizing unique local events and gatherings that attract the attention of local residents; (3) Loyalty programs for locals; (4) Engaging local residents in nature conservation and sustainable development programs; (5) Digital marketing and social media targeting the local market for advertising campaigns; (6) Studying local culture and traditions, integrating them into services and programs to create an authentic experience for local customers.

Source: formed based on [1; 5]

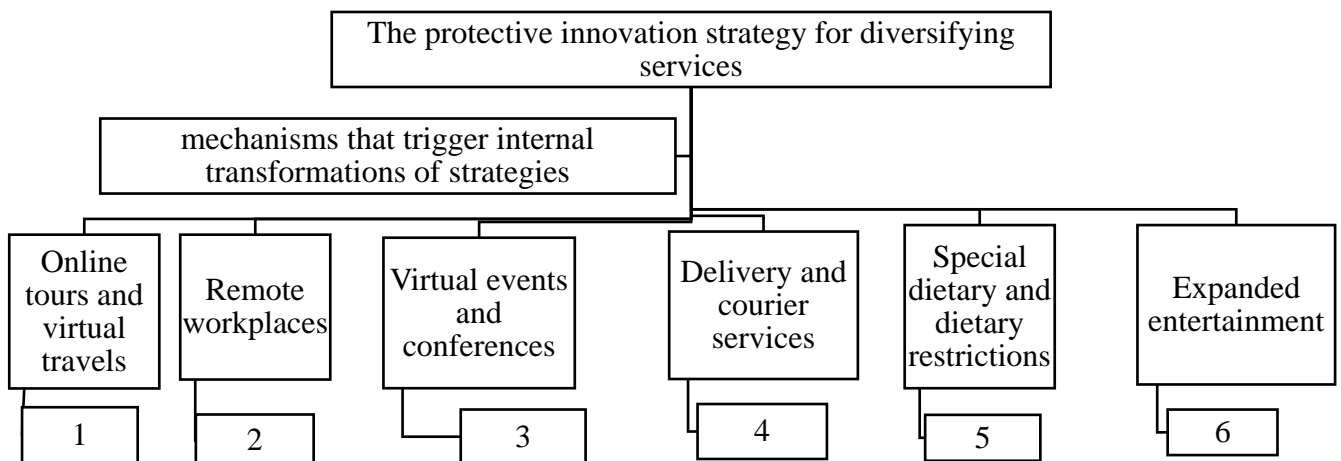


Figure 4. Triggers of the business protective innovation strategy for service diversification

Note

* (1) Developing an online tour or virtual travel program where customers can participate in remote journeys and tours through video conferencing (using virtual reality or 360-degree video to create extraordinary experiences); (2) Creating remote workplaces for employees and freelancers seeking comfortable and functional working environment outside of their homes; (3) Implementing virtual platforms for hosting online conferences, webinars, virtual exhibitions, and events to meet communication and learning needs in an online environment; (4) Expanding delivery services for meals, groceries, or other products, increasing accessibility and convenience for customers; (5) Organizing adventure trips and nature getaways; (6) Providing entertainment services such as a private cinema, bowling, billiards, or organizing family-friendly entertainment programs.

Source: formed based on [1; 3-4]

By applying the content of the highlighted innovative triggers above, businesses in the tourism and hotel-restaurant industry can quickly adapt to changes in demand and provide greater flexibility in service delivery during an economic crisis.

The protective innovation strategy of a company collaborating with local partners should focus on service triggers, such as (Figure 5):

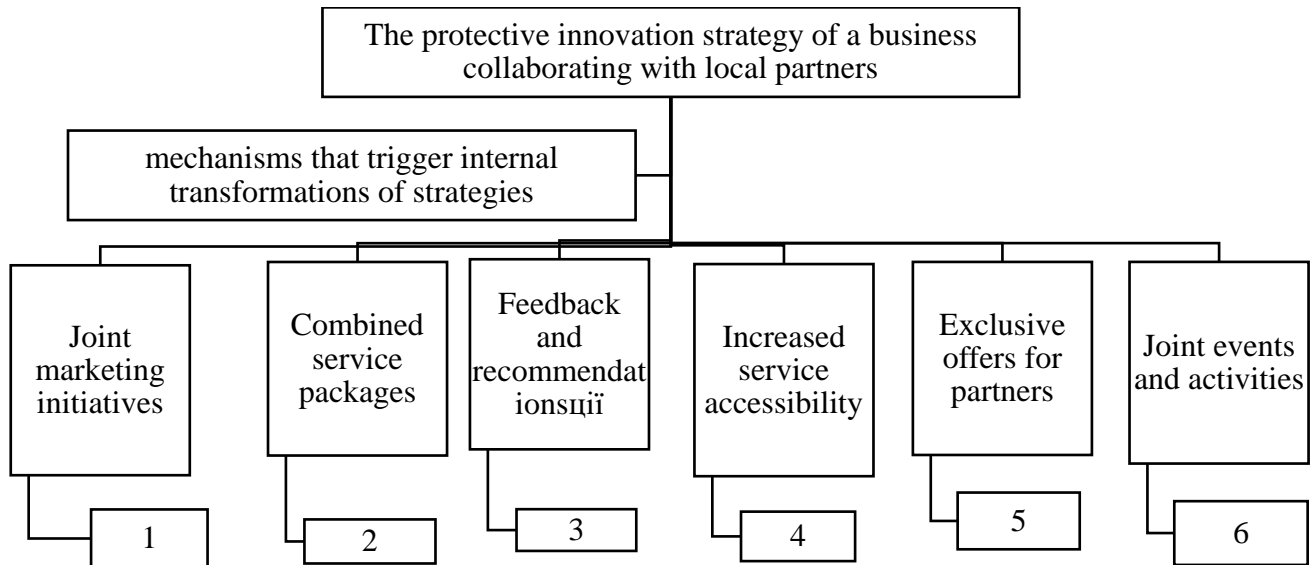


Figure 5. Triggers of the protective innovation strategy for a business collaborating with local partners

Note

* (1) Joint advertising campaigns and marketing initiatives that encompass multiple local businesses (allowing them to capture a larger audience's attention and raise awareness of their services); (2) Creating joint service packages with local partners (making offers more attractive to customers seeking a comprehensive experience); (3) Collaborating with partners (can increase the number of positive online reviews and recommendations help attract new customers); (4) Partnering with local transportation services or other businesses (can facilitate access to the business for customers); (5) Special terms and discounts for local partners (the opportunity to use the business's services and recommend them to others); (6) Organizing joint events, festivals, or sports competitions with local partners.

Source: formed based on [1; 5]

- 1) Joint marketing initiatives (formed as a strategic collaboration between two or more companies for jointly promoting their products or services [1]),
- 2) Combined service packages (formed as a marketing and sales strategy where two or more products or services are bundled into a comprehensive package offered to customers as a single unified product at a special price or with a discount),

- 3) Feedback and recommendations, increased service accessibility, exclusive offers for partners (formed as a set of special conditions or services offered by a company to its partners or participants in a partnership program [5]),
- 4) Joint events and activities (formed as a series of events organized or conducted jointly by two or more companies, organizations, or other groups to achieve common goals, exchange ideas, attract public attention, or foster partnership development [3]).

By applying the content of the highlighted innovative triggers, businesses in the tourism and hotel-restaurant industry can stimulate partnership relations and maintain a steady flow of customers. Collaborating with other local businesses can have a significant impact on the success of the business, especially when joint support and resources are crucial.

Conclusions from this study and prospects for further exploration in this area.

Based on the obtained results, it can be noted that the conditions of the modern economic crisis require the implementation of protective innovative development strategies in the tourism and hotel-restaurant business. In this regard, the following conclusions have been made:

1. Analysis of domestic experience has allowed us to identify a pool of 5 key protective innovative development strategies currently being applied in the tourism and hotel-restaurant business in times of crisis. These strategies include customer loyalty retention, cost optimization of the enterprise, local market engagement, service diversification, and collaboration with local partners.
2. Each of the identified protective innovative development strategies is chosen according to the needs of the tourism and hotel-restaurant business, as well as the conditions under which it operates. Considering the importance of continuous improvement and updates, it is crucial to embed innovative triggers (or mechanisms that timely initiate or deactivate internal transformations) into such strategies.
3. What makes these triggers specific is that each of them follows the following scheme within protective innovative development strategies for the tourism and

hotel-restaurant business: observation and analysis, identifying opportunities, strategy development, initiative launch, monitoring and evaluation (constant monitoring of their results and effectiveness), internal transformations. This outlined scheme is iterative and requires continuous refinement and adaptation to changes in the environment.

The obtained results emphasize the importance of protective innovative strategies for the tourism and hotel-restaurant businesses in times of economic crisis. Further research in this direction may involve a more in-depth study of the identified types of protective innovative strategies, their advantages and disadvantages in specific crisis conditions, and specific market segments.

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