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## HOSTELLING AT GLOBAL AND NATIONAL LEVELS

*The current state of the global hostel market is characterized. It has been established that the global hostel market reached USD 4.1 billion in 2022. The leader in the hostel market is the Asia-Pacific region, which is experiencing active recovery in international tourism following the COVID-19 pandemic. The European region ranks second, followed by the Americas. It has been determined that the largest share of hostel guests consists of individuals aged 25 to 34. The TOP-5 hostel networks in the world as of 2022 were: a&o Hostels, Zotel, Meininger, St Christopher's Inns, and Nomads World.*

*The current state of hostelling in Ukraine is analyzed. It has been established that at the present stage, under the conditions of Russian aggression in Ukraine, official statistics do not reflect the actual number of hostel establishments. The review of the hostel base was conducted based on online booking websites. Hotelmix offers guests hostels in 20 cities of Ukraine, totaling 272 hostels. The largest number of hostels is located in Kyiv (39.3% of the total number of available hostels), followed by Lviv (20%) and Odesa in third place (7.4%). Booking.com offers guests 275 hostels in various regions of Ukraine. It was found that not all hostels are listed on official online booking platforms.*

*A SWOT-analysis of hostel businesses was conducted. Positive changes in the hostel market require joint actions from government bodies and hostel operators. Combined efforts from both sides will ensure measures at the national level to improve hostel operations and advance the hostel industry to a new stage of development, while simultaneously preventing the influence of negative factors arising from the weaknesses in hostel operations (lack of service quality standards, the mass emergence of economy-class hotels in the market, insufficient information on hostel services, lack of legislative regulation for hostel operations) and threats (oversaturation of the market with hostel services, travelers' changing preferences toward more comfortable accommodations, the growth of the 2-3 star hotel segment, which offers an alternative to hostels, lack of government support, and a decrease in investment flows).*

*Key words: hostelling, hostel, hostel network, world regions, Ukraine.*

**Горожанкіна Н. А., Корнеєв М. В., Горб К. М., Третяк Є. С. Хостелінг на світовому та національному рівнях**  
*Охарактеризовано сучасний стан світового ринку хостелінгу. Лідером на ринку хостелінгу є Азійсько-Тихоокеанський регіон, в якому відбувається активне відновлення міжнародного туризму після пандемії COVID-19, друге місце посів Європейський регіон, третє – Американський. Встановлено, що найбільша частка гостей хостелів – це люди у віці від 25 до 34 років. Розглянуто ТОП-5 мереж хостелів у світі станом на 2022 рік: a&o Hostels, Zotel, Meininger, St Christopher's Inns, Nomads World.*

*Проаналізовано сучасний стан хостелінгу в Україні. Встановлено, що на сучасному етапі в умовах російської агресії в Україні офіційна статистика не відображає реальну кількість закладів хостельного господарства. Розгляд*

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хостельної бази здійснювався на основі сайтів онлайн-бронювання. *Hotelmix* пропонує гостям 20 міст України із 272 хостелами. Найбільша кількість хостелів припадає на м. Київ (39,3% від всієї кількості запропонованих хостелів), друге місце посідає м. Львів (20%), на третьому місці м. Одеса (7,4%). *Booking.com* пропонує гостям 275 хостелів в різних регіонах України. Встановлено, що не всі хостели представлені на офіційних сайтах онлайн-бронювання.

Проведено SWOT-аналіз діяльності хостельних підприємств. Позитивні зміни на ринку хостелів потребують спільних дій органів державної влади та хостелів. Спільні зусилля обох сторін забезпечать вжиття заходів на національному рівні для покращення діяльності хостелів та виведення хостельного господарства на новий етап розвитку, водночас запобігаючи впливу негативних факторів, що виникають через слабкі сторони функціонування хостелів (відсутність стандартів якості послуг, масова поява на ринку готелів економ-класу, відсутність у необхідній кількості інформації про послуги хостелів, відсутність законодавчого регулювання діяльності хостелів тощо) і загрози (зміна інтересів мандрівників до більш комфортального проживання, збільшення сегменту готелів 2–3 зірки, які є альтернативою хостелам, відсутність державної підтримки, зниження потоку інвестицій тощо).

Ключові слова: хостелінг, хостел, хостельна мережа, регіони світу, Україна.

**Problem Statement.** Modern tourist accommodation is characterized by a wide range of options, from large luxury hotels to small budget hotels. The growing popularity of independent travel has increased both the demand for and supply of small, budget-friendly accommodations in the hospitality market. This category of accommodation includes hostels, which are characterized by relatively low accommodation costs and the provision of basic services necessary for comfortable lodging and service.

The hostel market is a driving force in the global travel and hospitality industry. It offers budget-conscious travelers affordable yet social and engaging accommodation options, appealing to a wide range of tourists, from solo travelers to groups and families.

Hostels have become an essential part of the global tourism landscape, facilitating exploration and cultural exchange. This expansion has contributed to economic growth in various regions of the world, the creation of new jobs in the hospitality industry, and the development of small businesses.

Moreover, the development of digital platforms has made hostel bookings more accessible, further promoting the growth of international tourism. With an increased focus on sustainability and unique experiences, hostels continue to play a key role in shaping the global tourism market.

**Analysis of Recent Research and Publications.** The theoretical and methodological foundation of the research was based on the works of Ukrainian scholars, including I. Poplavska (Territorial Organization of Hotel Industry in Ukraine [20]), M. Aldoshina (Hostels as Collective Accommodation Facilities in Ukraine [12]), Y. Bondarenko, I. Kulyniak (Evaluation of Collective Accommodation Activities as a Recreation Sector Organization [14]), I. Stankevych, T. Sukhoruchenko (Functioning and Development Problems of Enterprises in the Hotel Business Sphere in Ukraine under Real-Time Information Conditions [10]), S. Pambuk, I. Ustenko, M. Mardar (Marketing Justification, Organizational and Economic Characteristics of Small Businesses in the Provision of Hotel Services [8]). The study of the spatial distribution of hostel establishments in European countries was based on official statistical data from the Hostel Market 2023 report [3], while the study of hostel operations in Ukraine was based on data from online booking platforms [5,18,19].

**Purpose of the Article:** to investigate the functioning of hostelling in global and national markets.

**Presentation of the Main Material.** Modern accommodation facilities are characterized by significant differentiation, ranging from large high-end hotels to small budget hotels. The growing popularity of self-planned travel has increased both the demand for and supply of small, budget-friendly accommodations in the hospitality market. These accommodations include hostels, which are distinguished by their relatively low cost and the provision of basic services necessary for comfortable lodging and service.

The term "hostel" refers to a European accommodation system that offers guests short- or long-term stays, typically providing a bed without additional in-room amenities [13].

According to the international classification of the UNWTO, hostels are classified as collective accommodation facilities and offer limited hotel services, excluding daily bed-making [16].

The global hostel market reached USD 4.1 billion in 2022, and it is expected to grow to USD 8.9 billion by 2030, with a GDP growth rate of 10.2% during the period 2023–2030 [3].

The Asia-Pacific region leads the hostel market, experiencing a rapid recovery in international tourism after the COVID-19 pandemic (54% of the pre-pandemic level as of 2023). The European region ranks second, followed by the Americas.

It can be noted that the largest share of hostel guests consists of individuals aged 25 to 34. This distribution is related to the popularity of hostels among a group known as "flashpackers" or "backpackers," who prefer the social atmosphere and amenities provided by hostels.

In European countries such as Germany, the UK, and France, hostels are predominantly concentrated in cities and cater mainly to youth and student tourism. In Spain and Italy, hostels are increasingly expanding throughout the country. The price per bed per night in major European countries ranges from 600 to 2000 UAH. The highest prices for hostel accommodation are in the UK, which can be explained by the high cost of living in this country, including accommodation services.

Let us take a closer look at the TOP–5 hostel chains in the world (Fig. 1):

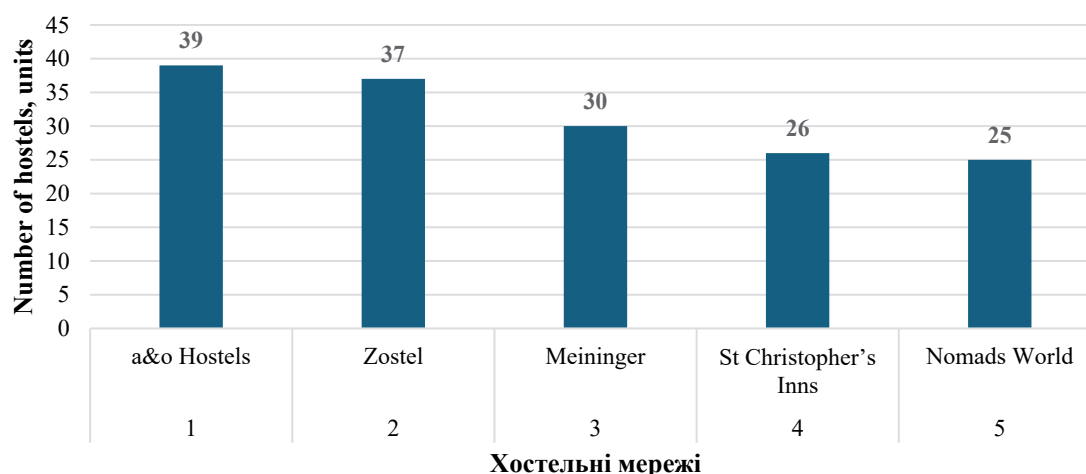


Figure 1. TOP–5 largest hostel networks in the world as of 2022

Source: compiled by the authors based on [2–4]

– The first place in terms of the number of hostels is held by the a&o Hostels chain, which operates 39 hostels with a total of 28,500 beds. The distribution across European countries is as follows: Germany (27), Austria (3), Denmark (2), Czech Republic (2), Italy (2), Hungary (1), Netherlands (1), Poland (1). The a&o Hostels chain was founded by Oliver Winter in 2000. The hostels are distinguished by offering modern, almost hotel–like amenities in central locations while maintaining affordable prices [1].

– The second place is occupied by the Zostel network, with 37 hostels and 2,000 beds. The region of operation is Asia, with 35 hostels in India and 2 in Nepal. Zostel was founded in 2013 and quickly became the largest hostel network in India and Asia. Almost all Zostels operate as a franchise model, which explains their rapid growth [11].

– Third place is occupied by the Meininger network, with 30 hostels and 14,700 beds. The network operates mainly in the European region: Germany (13), Austria (4), Italy (3), Netherlands (2), Belgium (2), France (4), Hungary (1), and Copenhagen (1). The hostel that operated in Russia ceased to exist [6]. Meininger, founded in 1999, brands itself as a "hybrid hotel," offering affordable accommodations with amenities similar to those of hotels. Its hostels stand out for their high–quality furnishings and modern rooms.

– Fourth place belongs to St Christopher's Inns, with 26 hostels and approximately 3,700 beds. The network operates in the European region: the United Kingdom (13), Germany (3), Netherlands (3), France (2), Switzerland (1), Spain (1), Belgium (1), Denmark (1), and Czech Republic (1). St Christopher's Inns is managed by a young and dynamic team [9].

– Fifth place goes to Nomads World, with 25 hostels, though the total number of beds is not specified. The hostels are located in the Australia and Oceania region: Australia (15) and New Zealand (10). Nomads World was founded by Richard McLeod in 1994 and is now the largest hostel network in the region. In 2015, Nomads World acquired the second–largest hostel network in Oceania ("Base"), which now operates under the Nomads brand [7].

It is worth noting that the COVID–19 pandemic had a significant impact on the hostelling market. Travel restrictions, quarantine measures, and safety concerns led to a sharp decline in both international and domestic tourism, causing many hostels to temporarily close or operate at reduced capacity. This resulted in substantial revenue losses, layoffs, and financial instability for many hostel businesses.

Russia's full–scale invasion of Ukraine has also significantly impacted the hostel market, primarily due to its effect on international tourism metrics. Military actions have caused disruptions in travel across Eastern Europe. Destinations such as Moldova, Slovenia, Latvia, and Finland have experienced substantial drops in flight activity, with some countries seeing decreases as high as 69% compared to 2019 levels.

Now, let's turn to the national hostel market. One of the key directions of Ukraine's domestic policy during the war is the development of domestic tourism in safer areas of the country. This can be considered an important source of economic activity, contributing to the financial and economic development of cities and regions, mobilizing human capital, revitalizing the service sector, and fostering the formation of modern cultural and humanitarian infrastructure [21].

Ukrainian cities and regions, with their rich historical, architectural, cultural, and natural potential, have significant preconditions for developing this industry as a major source of revenue and budget replenishment. At the same time, there is a need to increase the number of children and adolescents traveling within Ukraine, especially from the eastern regions, which are closer to the conflict zone.

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A key measure for the development of domestic tourism is the organization of a network of budget accommodation facilities, providing affordable lodging for youth, schoolchildren, and tourists during excursions to tourist and recreational destinations across Ukraine. Based on international experience and objective needs, it is advisable to refer to the best foreign practices in managing popular and relatively inexpensive accommodation facilities for travelers (youth hostels).

The most common and popular rooms accommodate 4, 8, or 10 people. Hostel accommodation is intended for less demanding travelers. The primary customer of this type of accommodation is the independent traveler, who embarks on a trip to another country or region of the country without purchasing a prearranged tour from a travel company.

Official statistical information does not provide the total number of hostels operating in Ukraine at this stage of the war. Therefore, we will examine the hostel base using data from online booking platforms.

On the website Hotelmix [5], the "Hostels of Ukraine" section provides a list of these accommodation facilities across cities in the country, though it should be noted that this list is not comprehensive. It reflects the most popular hostels that have positive reviews from visitors.

Hotelmix offers guests a choice of 272 hostels in 20 cities across Ukraine. The largest number of hostels is located in Kyiv (39.3% of all available hostels), followed by Lviv (20%) and Odesa (7.4%). This top three confirms the fact that in large cities with developed tourism potential, the availability of alternative accommodations to hotels at affordable prices is essential. Dnipro ranks sixth in terms of the number of hostels (4.4% of all listed hostels) on the site.

The lowest price for a night's stay in a hostel is 157 UAH at Hostel Darnitsa (Kyiv, the hostel consists of 129 rooms and is located 7 km from the Kyiv Pechersk Lavra and 8 km from the St. Michael's Vidubichi Men's Monastery). The average cost of accommodation in hostels across Ukraine is approximately 300 UAH in a mixed dormitory room.

Booking.com [18] offers guests 275 hostels in various regions of Ukraine. This figure is close to the data presented by Hotelmix. The Kyiv region ranks first, followed by the Lviv region, with the Odesa and Dnipropetrovsk regions sharing third place.

On the Hotels-of-Ukraine website [19], there is information on 983 hostels in Ukraine, indicating a much broader base of accommodation options listed on the site. Thus, it can be noted that, unfortunately, not all hostels are represented on official online booking platforms.

A review of hostels in Dnipro based on data from [19] shows information about 24 such accommodation facilities, mostly concentrated on the right bank of the city near the train station and central areas, highlighting the importance of transport accessibility to hostels.

The average price for a night's stay in a hostel is around 300 UAH. Most hostels in the city offer accommodation in rooms with 4, 8, or 10 beds. Meal services are not included and are not provided.

It can be noted that each hostel is unique and original. On the Internet, prices may range from 150 to 700 UAH to attract attention, but the actual average price category is around 250 UAH in Dnipro. A problem is the lack of information about hostels across different online booking platforms.

The hostel market is highly in demand in the frontline city, primarily due to the necessity for temporary relocation of residents from eastern regions, who require budget accommodation near transport hubs.

Hostels are an integral part of the country's tourism industry, helping to develop the hotel market and serving as a cost-effective option for budget-conscious tourists and city visitors.

The creation of hostels in Ukraine addresses problems that existing traditional hotel companies are unable to solve, such as providing housing for various social groups, establishing a base of budget accommodations, increasing domestic travel, employing local populations, and fostering the development of small and medium-sized businesses in the country.

Ukraine has its own challenges and prospects for hostel development, which will be discussed below.

A significant obstacle to hostel market development today is the ongoing war in the country, political instability, and difficulties in the banking sector. Hostel owners are hesitant to invest in improving the material and technical base of accommodations, enhancing service quality, and registering on various online booking platforms.

Key issues include the lack of high-quality offerings, the need to restore the hotel stock, low service levels, a shortage of qualified personnel, and the absence of themed hostels. If we look at hostels in economically developed countries, they resemble small hotels with their own themes, design, and history.

Another issue is the high price levels. Sometimes, the cost of staying in a Ukrainian hostel is much higher than in a similar hostel in a European country, which can be explained by the shortage of hostels in the market. A cheap hostel in Ukraine is more likely to resemble an old storage room rather than a comfortable place for overnight stays, while a hostel meeting European standards will have a price comparable to a comfortable hotel room.

The further development of hostels as a sector of hotel services creates conditions for applying internal and social factors in other industries:

1. High economic efficiency of hostels. The technical management process of hostels and guest services offers affordable services because accommodation services are highly competitive compared to the more expensive

services of traditional hotels. Modern hostels have transformed from simple overnight accommodations into facilities offering a range of additional services. This allows the hostel to differentiate its products for different consumer segments (family travelers, youth, business travelers). Although this list of additional services is limited, it enables low-income travelers to access affordable accommodations.

2. High competitiveness of hostel services in terms of price-quality ratio, flexibility of structure, and the ability to quickly respond to changes in supply and demand.

3. Hostel operations allow offering competitive prices to consumers. Hostel accommodation costs are lower than those of budget hotels, and hostels have a more flexible market structure that can quickly adapt to market conditions and change pricing strategies accordingly.

4. Hostels meet the accommodation needs of a wide range of people, mostly young individuals and those with middle incomes, ensuring high occupancy rates in accommodation facilities [21].

With careful analysis of drawbacks and implementation of measures at the state level, hostels can become as popular as hotels. This can be achieved by: low competition in the hostel market and high demand for accommodation facilities, as most hostel guests are business travelers, students, and budget-conscious tourists who require basic lodging for a short stay; after Ukraine's victory in the war with Russia, a new large wave of tourists is expected, the majority of whom will be young people from various countries around the world; the third advantage is related to modern travelers' preference for a complete sense of comfort, uniqueness, and originality in accommodation. Hostels' competitive advantages include personalized guest service, the exclusive opportunity to stay in a diverse environment with foreigners and interact with them, and a relatively quick return on investment (3–5 years) [17].

To ensure the active functioning of the hostel market in Ukraine's regions, close interaction between government bodies and hostel owners is needed. This collaboration will not only implement measures to improve hostel operations at the national level and elevate them to a new level of functioning but also protect hostels from negative factors caused by the weaknesses in hostel operations and threats identified through the SWOT analysis (Table 1).

Table 1

#### Strengths and Weaknesses of Hostel Enterprises

Strengths	Weaknesses
Increase in tourist numbers Rising popularity of hostel stays Growth in the number of hostels with below-average pricing Central location Individual approach to guests Consistently high occupancy rates	Lack of service quality standards Mass emergence of budget hotels on the market Insufficient information about hostel services Lack of legislative regulation for hostel operations
Opportunities	Threats
Expansion of the small accommodation market Obtaining international quality certifications	Oversaturation of the market with hostel services Shift in traveler preferences toward more comfortable accommodations Growth of the 2–3 star hotel segment, which serves as an alternative to hostels Lack of government support Decline in investment flow

Source: compiled by the authors

**Conclusions and Future Research Prospects.** Drawing on global experience in the development and functioning of hostelling, effective collaboration between the private and public sectors in Ukraine's hostelling market development should include: the development of regulatory documents governing hostel operations in Ukraine; the establishment of a functional association/union that assists hostels in promoting services, provides consultancy support, and participates in drafting legislative documents for hostel operations; cooperation with government bodies in gathering and analyzing data on hostel operations, identifying promising directions for the country's tourism and recreation policies, and using this data to shape long-term tourism development strategies.

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