

DEVELOPMENT OF THE UKRAINIAN TOURISM INDUSTRY IN THE CONTEXT OF INTEGRATION TO THE EU

РОЗВИТОК ТУРИСТИЧНОЇ ГАЛУЗІ УКРАЇНИ В КОНТЕКСТІ ІНТЕГРАЦІЇ ДО ЄС

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In the article, features of the development of the tourist industry of Ukraine in the light of modern tendencies of international tourism development are explored. The dynamics and structure of the modern tourist market of Ukraine, as well as tourist flows between Ukraine and the EU, are analysed. The main problems of integration of Ukraine into the European market of tourist services are determined and the measures to accelerate the European integration of Ukraine in the field of tourism are suggested. The possibility of a positive progressive development of the tourist business of Ukraine on the path of the European integration only in case of profound reformation of this industry and adaptation of its functioning to the European standards is indicated, as well as the positioning of tourist opportunities of Ukraine in the international community, mainly among the European tour operators.

Key words: international tourism, international cooperation, Ukraine and the EU, tourism industry, tourist flows.

Сучасна світова індустрія туризму є однією з найбільш динамічно зростаючих та високодохідних. На рівні певної країни значення туризму в економічному сенсі полягає у формуванні її ВВП, створенні додаткових робочих місць та загальному забезпеченні зайнятості населення, у соціальному – у зростаючій ролі в розвитку людини та формуванні рівня і якості її життя. Загалом туристичний сектор є своєрідним прискорювачем соціально-економічного розвитку країни, завдяки ланцюговому позитивному ефекту на інші галузі економіки: транспортну, будівельну, харчову, сільське господарство, зв'язок тощо. Окрім цього, важливим є значення туризму в якості джерела валютних надходжень, розширення та поглиблення міжнародних контактів – як соціально-економічних, так і культурних. Актуальність дослідження полягає у певній відсталості розвитку туристичної галузі України з погляду світових тенденцій та посилення конкуренції між країнами на світовому туристичному ринку. Метою статті є аналіз та якісна оцінка стану туристичного сектору України як складової її економіки, виявлення проблем, що стримують та пригальмовують її розвиток, а також окреслення заходів щодо прискорення розвитку туризму в Україні з позицій її євроінтеграції. Для досягнення означеної мети було застосовано такі методи досліджень, як аналіз, синтез, порівняння, аналогія, абстрагування та узагальнення. Головною проблемою євроінтеграції України в сфері туризму є значне випередження імпорту туристичних послуг над експортом, і в цілому – значне переважає виїзного туризму над вїзним (або зарубіжного над іноземним). Збільшується кількість громадян України, що виїжджають за кордон з туристичною метою, у порівнянні з кількістю іноземних туристів, що відвідують Україну. Європейський Союз є стратегічно важливим партнером України у багатьох галузях, у тому числі і в сфері туризму. Позитивний поступальний розвиток туристичного бізнесу України на шляху євроінтеграції можливий лише у разі глибинного реформування цієї галузі та пристосування її функціонування до європейських стандартів. Цей процес значною мірою визначається спроможністю влади впроваджувати системні інституційні зміни, здатні покращити та привести до міжнародних норм національний туристичний сектор. Зокрема, першочергово варто стимулювати поживлення розбудови внутрішнього туризму, створити сприятливі умови для залучення інвестицій у туристичну галузь, забезпечити подаль-

шу лібералізацію зовнішньоекономічної діяльності та підвищити ефективність використання фінансових ресурсів, які виділяються ЄС на підтримку економічних реформ в нашій державі. Важливим також є напрям позиціонування туристичних можливостей України серед міжнародної спільноти, головним чином – серед європейських туроператорів.

Ключові слова: міжнародний туризм, міжнародне співробітництво, Україна та ЄС, туристична галузь, туристичні потоки.

В статье исследованы особенности развития туристской отрасли Украины в свете современных тенденций развития международного туризма. Проанализирована динамика и структура современного туристского рынка Украины, а также туристские потоки между Украиной и ЕС. Определены основные проблемы интеграции Украины в европейский рынок туристских услуг, а также предложены меры по ускорению евроинтеграции Украины в сфере туризма. Указано на возможность положительного поступательного развития туристского бизнеса Украины на пути евроинтеграции только в случае глубокого реформирования этой отрасли и приспособления ее функционирования к европейским стандартам, а также на позиционирование туристских возможностей Украины в международном сообществе, главным образом – среди европейских туроператоров.

Ключевые слова: международный туризм, международное сотрудничество, Украина и ЕС, туристская отрасль, туристские потоки.

Formulation of the problem. In the modern world, the tourism industry is one of those emerging world economic sectors that are most profitable. The social component of tourism is important, as well as its growing role in human development, the formation of the level and quality of human life. The economic component of tourism lies in the importance of forming the country's GDP, creating additional job places, and ensuring the employment of the population. The tourism industry can be considered as a kind of accelerator of the country's socio-economic development, as it has a chain-positive effect on many other sectors of the economy, including transport, construction, food, agriculture, communications, etc. In addition, the role of tourism as a source of foreign exchange earnings, expansion and deepening of international contacts cannot be underestimated.

According to the World Tourism Organization, the share of international tourism is about 11% of world GDP and 6% of world exports [13]. At the present stage, tourism has become of great significance, and for the rapid pace of development, it has been recognized as an economic phenomenon of the twenty-first century. More and more countries are actively involved in the process of tourist development of geographic space in recent years, and Ukraine is not an exception. However, in spite of the obvious importance of tourism as one of the most important sectors of the economy, in Ukraine, it is not given enough attention.

Analysis of recent research and publications. Many studies of domestic and foreign scientists are devoted to the study of the peculiarities of international tourism development and the role of Ukraine in the world market for tourist services, as well as to the development of the tourism industry in the context of European integration. Among them: H. V. Balabanov [1], T. O. Hrachevska [2], M. S. Yemets [4], R. V. Korsak [6], P. O. Podliepina [9], N. O. Stepanenko [10], Yu. Yu. Yurchenko [12], and many others. However, given the revival of

tourist flows and insufficient level of the solution by the Ukrainian government of the problems hampering the development of tourism in Ukraine, the peculiarities of tourism cooperation need a constant monitoring and thorough study.

The aim of the article is to analyse and qualitatively assess the state of the tourism industry in Ukraine, to define problems that hamper its development, and to identify measures to accelerate Ukraine's European integration in the field of tourism.

The main results of the investigation. The modern tourist industry remains one of the largest sectors of the world economy. International tourism today is one of the most profitable and fast-growing sectors of the world economy. According to the World Tourism Barometer of International Tourism Organization (UNWTO), the number of international tourist arrivals in the world in 2017 increased by 6.7% (from 1239 to 1322 million people respectively), which has become absolutely record-breaking in the last 20 years [13]. Moreover, UNWTO experts predict that international tourist revenues around the world will grow by 4-5% each year. These data suggest a steady increase in the relevance of tourism in the world.

Despite the world trends and significant domestic tourism potential, the state of the tourist industry of Ukraine still leaves much to be desired. Among the numerous advantages of the domestic tourism industry, one of the main is the incredible variety of its tourist destinations: there are mountains, seas, health resorts, castles, and architectural monuments. However, the underdeveloped infrastructure base and the disadvantages of the legal regulation of the tourism industry have led to the fact that Ukraine occupies a small place in the world tourism industry.

The tourist industry of Ukraine is characterized by a significant advance in the imports of tourism services over exports. Analysing the structure of the industry in terms of incoming, outgoing, and

domestic tourism since the beginning of this century, one can see that it has undergone significant changes (Fig. 1). Thus, at the beginning of the century, almost a third of all tourists in Ukraine were domestic tourists, and the share of foreign tourists and tourists-citizens of Ukraine traveling abroad was almost equal and amounted respectively 18.8% and 14.2% of the total tourists.

However, this situation is changing every year. Thus, the share of domestic tourists (from 67% in 2000 to 17% in 2017) decreases significantly and, accordingly, the share of Ukrainian outgoing tourists increases (from 14.2% in 2000 to 81.6% in 2017). The tendency to reduce the share of foreign tourists, which in 2014 was the lowest (0.7%), continues. Since then, it slowly started to grow in recent years, but still remains extremely low (1.4% in 2017) [3].

In 2014–2015, the tourist market of Ukraine has undergone serious trials. The change of power,

the revolution, the annexation of the Crimea, the anti-terrorist operation in the East, the devaluation of the national currency, and the decline of the living standards of the population, – all of these factors have had a negative impact on the tourism industry and on the overall image of our country abroad. The demand for tourism has fallen by 70%. The outbound tourist flow from Ukraine, which amounted to about 2 million people a year, decreased to 700-800 thousand.

In general, the tourism industry of Ukraine includes both active recreation and sports tourism (skiing, cycling and water tourism, mountaineering, etc.), as well as tourism for cognitive purposes, taking into account the potential of a rich national archaeological and religious history. Many tourists from different parts of the world come to visit unique health resorts, by which literally all regions of Ukraine can boast of. In addition, today in almost all areas, even where there is no mountains and

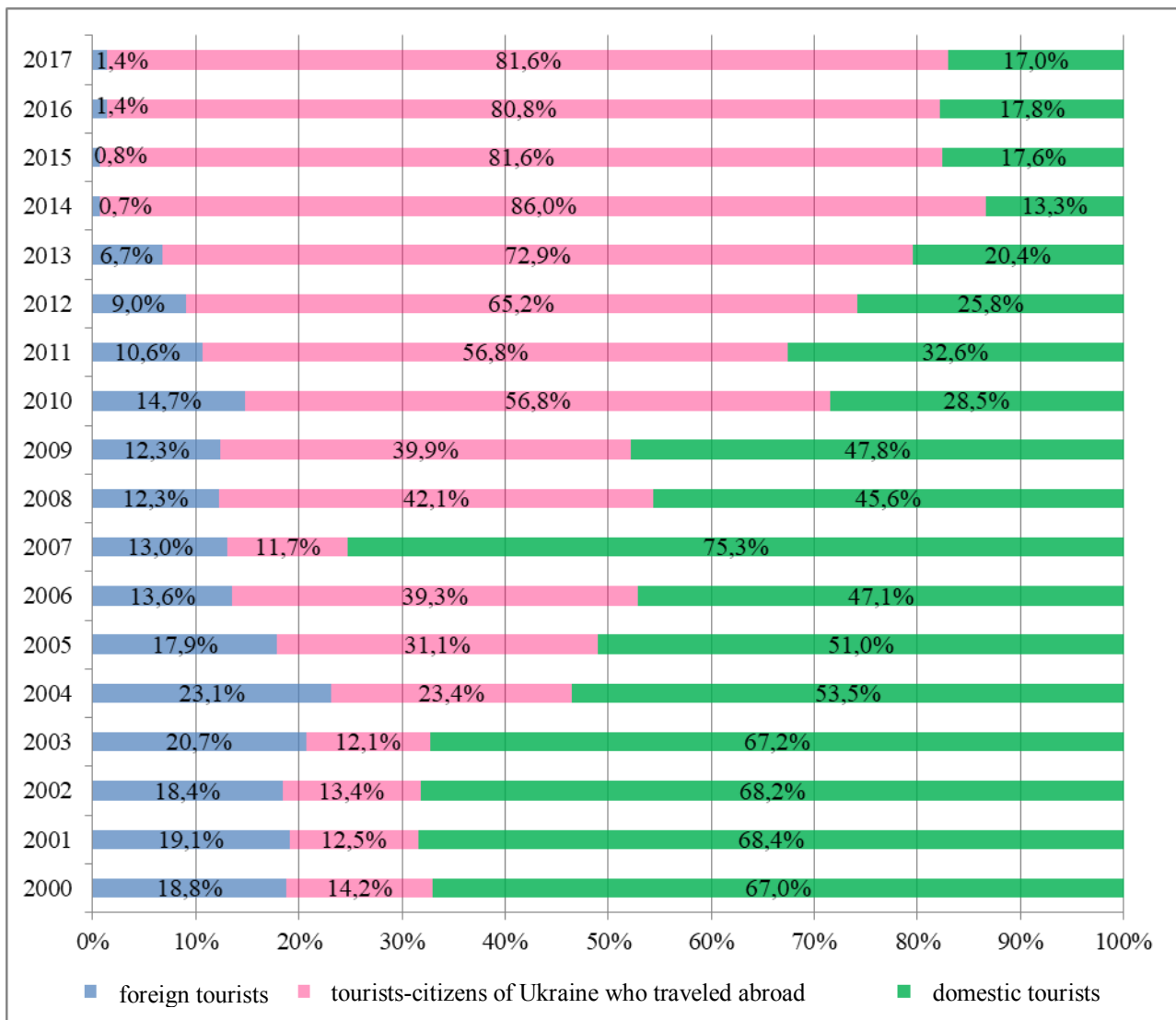


Fig. 1. Structure of the tourist industry of Ukraine in 2000–2017, %

Source: compiled by the authors according to the data of [3]

sea, there are actively interesting tourist novelties. For example, Kryvyi Rih is currently actively involved in such a tourist niche as industrial (manufacturing) tourism, which includes hiking in mines, canyons, etc. However, the main tourist destinations of Ukraine still remain the Black Sea and the Azov coast, the Carpathian Mountains, the cities of Kyiv, Lviv, and Odesa. In addition, Ukraine is rich in rivers, the main of which is the Dnieper, which enables tourists to enjoy beach holidays, fishing and surfing. Exploring the inbound and outbound tourism flows of Ukraine over the past 5 years (2013–2017), one can see that only a slightly positive balance was observed at the beginning of the survey period (2013), and from 2014, the negative one remained, which with every year is constantly increasing and in 2017 already reached the mark – 12 million people. This means that every year more and more tourists – Ukrainian citizens travel abroad for a tourist purpose, compared with the number of foreign tourists visiting Ukraine (Table 1).

Analysing the structure of the number of Ukrainian citizens who travelled abroad in 2017 for the purpose of the trip, one can see that the purpose of tourism for 99.2% of Ukrainians is a private trip. A small percentage was made by business trips and organized tourism. In the case of inbound tourism among foreigners, the private purpose of travel (96.6%) also prevails, and 2.5% – cultural and sports exchange.

In 2017, a survey of the Ukrainian tourist services market was conducted through a direct survey of more than 600 foreign tourists of all ages who arrived in Ukraine for a tourist purpose [5]. The study found that the most popular places in Ukraine for foreigners include museums, galleries, and exhibitions – this category is interesting for 29.9% of tourists, 23.3% of foreigners are interested in religious objects of the city, and visiting cafes and restaurants is the purpose of arrival only for 10.9% of the tourists surveyed.

In general, according to the study, the index of satisfaction of foreign tourists in Ukraine was 4,25 points on a 5-point scale, which suggests that the vast majority of foreign tourists are still satisfied after visiting our country. Thus, Ukraine still remains interesting for a foreign tourist.

An important partner of Ukraine in the international arena is the European Union. At a special stage, relations between the parties came out with the signing of the Association Agreement

between Ukraine and the EU, aimed at deepening integration in the sphere of politics, trade, culture, strengthening of security, as well as promoting the development of cooperation in the field of tourism.

According to the State Statistics Service of Ukraine, the overall dynamics of the number of Ukrainian citizens traveling abroad to the EU countries for 2013–2017 is positive, it has increased by 38.9% over the last 5 years (from 11 906 918 people in 2013 to 16 537 983 in 2017) (Fig. 2). However, this dynamics is not typical for all EU countries: the number of Ukrainian tourists has significantly decreased to Portugal (by 90.4%), Croatia (by 73.8%), the Czech Republic (by 56.8%), Malta (by 51.7%), and Greece (by 48%). In the structure of Ukrainian outbound tourism to the EU, the tourist flow to Poland continues to dominate, whose share for the period under study continues to grow: from 58.7% in 2013 to 60.4% in 2017 from the total number of Ukrainian citizens traveling abroad to the EU countries as tourists.

However, it should be noted that the statistics are not sufficiently correct due to the so-called “shuttle traders”, which run every day between Ukraine and the nearest western neighbours (Poland, Hungary, Romania) in order to offer cheaper Ukrainian goods and who are not tourists in the full sense of this words, although statistics refer them to tourists.

Analysing the inbound tourist flows from the EU countries to Ukraine, it can be seen that in quantitative terms, they are significantly inferior to the outflow flows, which leads to a negative balance, which is increasing every year and already exceeded 12 million in 2017. This suggests that despite a slight increase from 2014 by the number of European tourists visiting Ukraine, the number of domestic tourists traveling to the tourist destinations to the EU is growing at a much faster pace.

From Fig. 2 it can be seen that a significant drop in the number of European tourists to Ukraine took place from 2013, due to the financial and economic crisis that continues in recent years, and the events associated with the annexation of the Autonomous Republic of Crimea and the conduct of the operation of the combined forces in the East of Ukraine. In the imagination of many potential tourists of Ukraine, there is the impression of a full-scale war, and the country is perceived as a hot spot. In addition, the reason for the fall of the tourist flow from the European Union to Ukraine is also

Table 1

Inbound and outbound tourist flows of Ukraine in 2013–2017, number of people*

	Years				
	2013	2014	2015	2016	2017
Inbound flows	24671227	12711507	12428286	13333096	14229642
Outbound flows	23761287	22437671	23141646	24668233	26437413
Balance	909940	-9726164	-10713360	-11335137	-12207771

Source: compiled by the authors according to the data of [3]

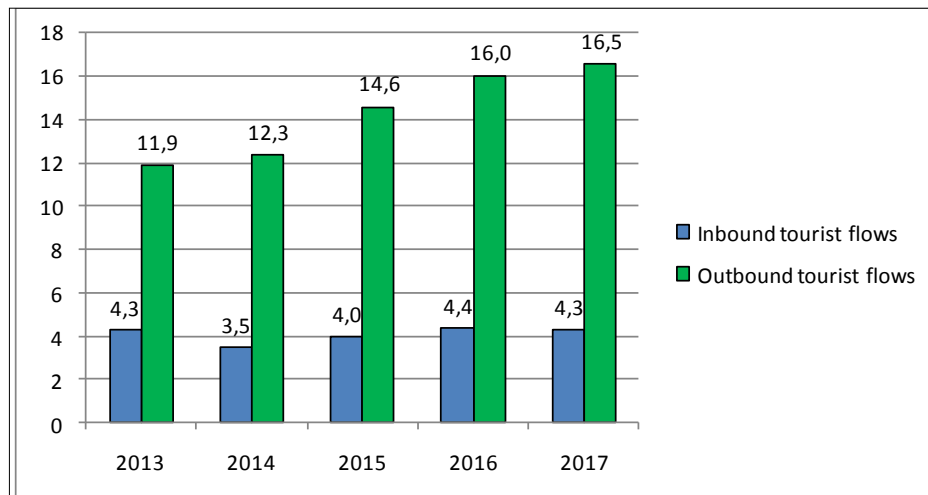


Fig. 2. Dynamics of inbound and outbound tourist flows between Ukraine and the European Union (2013–2017), million people

Source: compiled by the authors according to the data of [3]

that Ukraine loses significantly in the competition, lagging behind the leading countries of the world in terms of the development of tourism infrastructure and the quality of tourist services.

In the structure of inbound tourism with the EU, the tourist flow from Poland dominates, which accounted for 29.4% in 2013, and in 2017 it fell slightly to 26.5% of the total number of foreigners leaving the EU for Ukraine. A significant share of tourists also belongs to Hungary (25.9%) and Romania (18.3%). However, the significant reduction in the number of visits to Ukraine with the tourist aim from Slovenia (by 32.7%), Greece (by 27.0%), Bulgaria (by 25.6%), Germany (by 17.3%), and Slovakia (by 13.7%) should be noted.

Even taking into account the considerable available tourist resources and unique potential tourist opportunities, Ukraine at this stage is significantly behind the developed countries in terms of position in the world tourist market. In general, when conducting an analysis of the European experience in the field of tourism, it is necessary to pay attention to the formation of new trends in tourism, which are associated with the processes of globalization. Globalization in the tourism sector, first of all, supposes the disappearance of any barriers in the process of conducting international tourist exchanges, tourist “curtailment” of the globe by reducing the cost of intercontinental air travel and improving the quality of tourism infrastructure in all countries of the world, etc. [11]. But it should be noted that Ukraine’s tourism industry, though with somewhat slow steps, begins to improve its performance.

The main factors contributing to the development of tourism in Ukraine are: a certain supersaturation of some of the closest competitive region-rivals and country-rivals by foreign tourists; the growth of investment attractiveness of the sphere of recreation and entertainment; a variety

of investment projects for work in the field of recreation; development of the domestic tourism market on the basis of effective use of existing diversity of tourist resources and infrastructure in our country; strengthening of the image of the regions of Ukraine on the world tourism arena; informing domestic and foreign tourists on the peculiarities of the historical and cultural heritage of the regions of Ukraine.

In order to ensure rational and effective use of cognitive, medical and nature-recreational tourism resources of Ukraine, it is necessary to form a competitive and sustainable tourist and recreational space by creating and ensuring the functioning of separate development zones of tourism and resorts. In addition, the development, implementation, and presentation of a competitive national tourism product, which will be in demand for today’s European consumer, are extremely important.

Conclusions. The tourist industry is a certain accelerator of the socio-economic development of many regions and countries. In many countries, it contributes to a large share of GDP and has a positive effect on the economy and, overall, on its image on the world stage. The tourism industry also has an important role in Ukraine. The European Union is an important partner of our country in various spheres; with every year, the tourist flows between Europe and Ukraine are reviving, many tourists come to our country to see the sights, as well as to visit unique historical objects, to get acquainted with the Ukrainian architecture and culture. However, there are a number of problems hampered by the development of the domestic tourism industry. Therefore, the issue of tourist attractiveness of our country is becoming more and more urgent and requires gradual, but confident actions to improve it.

The positive development of tourism business of Ukraine on the path of the European integration is possible only due to reforming this industry and adapting its functioning to the European standards. This process is largely determined by the ability of the authorities to introduce systemic institutional changes aimed at various reforms in the devel-

opment of tourism. In particular, it is necessary to stimulate the revival of the tourism industry, to create favourable conditions for attracting investments, to ensure further liberalization of foreign economic activity, and to increase the efficiency of use of financial resources allocated by the EU in support of economic reforms in our country.

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