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**STUDY OF THE COMPETITIVENESS OF UKRAINE
IN THE EUROPEAN MARKET OF TOURIST SERVICES**

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**ДОСЛІДЖЕННЯ КОНКУРЕНТОСПРОМОЖНОСТІ УКРАЇНИ
НА ЄВРОПЕЙСЬКОМУ РИНКУ ТУРИСТИЧНИХ ПОСЛУГ**

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**ИССЛЕДОВАНИЕ КОНКУРЕНТОСПОСОБНОСТИ УКРАИНЫ
НА ЕВРОПЕЙСКОМ РЫНКЕ ТУРИСТИЧЕСКИХ УСЛУГ**

The article highlights the main approaches to assessment of a country's competitiveness in tourism sector. The assessment of Ukraine's competitiveness in the European market of tourist services is made using the indicators of the Travel and Tourism Competitiveness Index, the Registered Competitive Advantages ratio and the Ratio of Relative Foreign Trade Advantage of the tourism industry, its strengths and weaknesses are identified. The ways of increasing the competitiveness of Ukraine in the process of ensuring its integration into the European tourism market are substantiated, which include improvement of infrastructure, improvement of regulatory, marketing, investment, staffing support, etc.

Keywords: tourist service; market of tourist services; competitiveness; the Travel and Tourism Competitiveness Index (TTCI); the Registered Competitive Advantages ratio (RCA); the Ratio of Relative Foreign Trade Advantage of the tourism industry (RTA).

Fig.: 1. Table: 3. References: 19.

У статті виділено основні підходи до оцінки рівня конкурентоспроможності країни в туристичній сфері. За допомогою показників Індексу конкурентоспроможності у сфері подорожей та туризму, коефіцієнта виявлених конкурентних переваг та коефіцієнта відносної зовнішньоторговельної переваги проведено оцінку конкурентоспроможності України на ринку туристичних послуг Європи, визначено її сильні та слабкі позиції. Обґрунтовано шляхи підвищення конкурентоспроможності України в процесі забезпечення її інтеграції до європейського туристичного ринку, серед яких покращення інфраструктури, вдосконалення нормативно-правового, маркетингового, інвестиційного, кадрового забезпечення тощо.

Ключові слова: туристична послуга; ринок туристичних послуг; конкурентоспроможність; Індекс конкурентоспроможності країн у сфері подорожей і туризму (TTCI); коефіцієнт виявлених конкурентних переваг (RCA); коефіцієнт зовнішньоторговельної порівняльної переваги (RTA).

Рис.: 1. Табл.: 3. Бібл.: 19.

В статье выделены основные подходы к оценке уровня конкурентоспособности страны в туристической сфере. С помощью показателей Индекса конкурентоспособности в сфере путешествий и туризма, коэффициента выявленных конкурентных преимуществ и коэффициента внешнеэкономического сравнительного преимущества проведена оценка конкурентоспособности Украины на рынке туристических услуг Европы, определены ее сильные и слабые позиции. Обоснованы пути повышения конкурентоспособности Украины в процессе обеспечения ее интеграции в европейский туристический рынок, среди которых улучшение инфраструктуры, совершенствование нормативно-правового, маркетингового, инвестиционного, кадрового обеспечения и т.д.

Ключевые слова: туристическая услуга; рынок туристических услуг; конкурентоспособность; Индекс конкурентоспособности стран в сфере путешествий и туризма (TTCI); коэффициент выявленных конкурентных преимуществ (RCA); коэффициент внешнеэкономического сравнительного преимущества (RTA).

Рис.: 1. Табл.: 1. Библ.: 19.

JEL Classification: L83

Target setting. In conditions of globalization, tourism has become one of the most important and promising economic sectors, which is developing rapidly and promotes not only satisfaction of people's needs for recreation and entertainment, but also economic growth and improvement of welfare of the citizens of a country.

Despite Ukraine's multi-vector cooperation in tourism sector, its geopolitical position and aspirations for European integration necessitate concentration of significant attention on the European vector of cooperation. An important task for Ukraine is to bring to the European market a competitive national tourist product that can make significant contribution to the formation of positive foreign trade balance and GDP growth. In this regard, the problem of studying the competitiveness of this state in the European market of tourist services and finding ways to increase it becomes relatively urgent.

Actual scientific researches and issues analysis. Problems of tourism development in Ukraine and its competitiveness are in the focus of domestic scientists. In particular, the article of S. P. Grabovenska [1] revealed competitive advantages that enhance Ukraine's competitiveness in the world market, and considered the main directions of improving the tourism industry. V. Y. Dubyk and O. B. Osidach [3] disclosed the marketing factors that influence the competitiveness of domestic tourism enterprises and suggested ways of forming a marketing strategy for achieving the competitiveness of Ukrainian enterprises in the international tourist services market. The article of N. O. Stepanenko [11] is devoted to the coverage of problems of the current state of Ukrainian tourism, its competitiveness, as well as the peculiarities of development in terms of European integration. The current state of Ukrainian tourism, as well as the peculiarities and perspective directions of its development are also studied in the article by E. V. Smyrnov and O. P. Smyrnova [8]. The study of I. G. Smyrnova [9] determines different approaches to assessing competitiveness of countries in the world tourism market and defines the place of Ukraine in the rating of the Travel and Tourism Competitiveness Index of 2015.

Uninvestigated parts of general matters defining. At the same time, despite existence of many scientific works on the development of tourism and its competitiveness, the problems of positioning of Ukraine in the European market of tourist services in domestic economic studies are considered mainly fragmentary. This issue has not been developed in detail yet.

The research objective. The purpose of the article is to study the theoretical and practical bases of Ukraine's competitiveness in the European market of tourist services and substantiate ways to increase it.

The statement of basic materials. We consider the competitiveness of a country in the market of tourist services as its ability to ensure the production of competitive tourist services, which is a prerequisite for the presence in a competitive market [5]. A competitive tourist service better, in comparison with competitors, corresponds to the needs and expectations of tourists at the least cost of its provision. Such service should reflect the optimal «price – quality» ratio.

Competitiveness of a country in the market of tourist services is characterized by such indicators as the amount of attracted tourist flow and the amount of cash receipts from it. As countries have different competitive advantages in the tourism sector, it is difficult to reliably assess the competitiveness of a particular direction with quantitative indicators. In this regard, a rating approach is used.

One of the key and authoritative rating indicators for assessing a country's competitiveness in the travel and tourism sector is the Travel and Tourism Competitiveness Index (TTCI), which is calculated by the World Economic Forum and shows the overall assessment of the factors contributing to the development of tourist business in individual countries.

In addition, economic literature addresses other approaches to assessing a country's competitiveness in the tourism sector. Thus, Russian scientist Ushakov D. S. [12, p. 181] proposed a method for calculating the Registered Competitive Advantages (RCA) ratio, which was supported by domestic scientists, in particular, by Smirnov I. G. [9, p. 38]. This technique allows to independently determine the level of competitiveness of a country in tourism sector for the years required, since it is based on the indicators available for analysis.

The competitiveness of Ukraine in the European market of tourist services means the capability of ensuring the production of such a tourist product that will be able to compete in the established environment of the European market [5]. In order to have competitive advantages in meeting consumer demands, the tourist product must be unique, innovative and high-quality, timely and quickly adapt to changes in the tourist market.

The European market of tourist services is currently one of the largest segments of the world market, both in terms of tourist arrivals and revenue from international tourism. In 2017, European countries were visited by 670.6 million tourists, which is 8 % more than in

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2016, 38 % more than in 2010, and 48% more than in 2005 [17]. In the overall structure of international tourist arrivals, the European continent accounted for 51 % in 2017, including the EU countries at 41 %. In 2017, international tourism brought European countries revenue of \$ 519.2 billion, which is 8 % more than in 2016 and 22.8% more than in 2010 [18]. In the total structure of revenue from international tourism, the share of European countries accounted for 39%, including the EU countries at 33%.

The European region is a leader in the rating by the Travel and Tourism Competitiveness Index, with six European countries being in top-10. This region holds the highest ranking due to the high level of development of tourist services, health care and hygiene infrastructure; especially thanks to the Schengen area, which provides a high degree of international openness and integration. The development of tourism in Europe is facilitated by geographical proximity of countries, developed network of transport communications, close economic, cultural and ethnic ties, unique tourist resources, and highly developed tourism industry [3, p. 67].

Most European countries are traditionally tourist, have a good tourist image, long-lasting tradition of high-quality tourist servicing, and are widely using marketing tools to promote travel services. However, there are still some problems in the European region, in particular, not all countries have cultural resources, give priority to tourism and respond to new trends.

At the end of the last century, new players appeared in the European market of tourist services, namely, the countries of Central and Eastern Europe, including Ukraine, which in 2005 obtained full membership in the European Tourism Commission. Being located in the center of Europe and possessing the potential of tourist attractiveness, Ukraine has every opportunity to become one of its leading tourist centers.

First of all, Ukraine's competitive advantages are ensured by its favorable geopolitical position, as this state stands on the European crossroads, being both part of the Central and Eastern and Southeastern Europe, which is favorable, in particular, for business tourism.

The natural-recreational and cultural-historical resources of Ukraine are attractive for European tourists. According to the level of possession of historical, natural, cultural resources, ethnographic heritage and architectural monuments that may be of interest for foreign tourists, this state takes one of the leading places in Europe [9, p. 31]. The development of cognitive, therapeutic and ecological tourism in Ukraine is facilitated by moderate climate, originality of natural landscapes, presence of a diverse sanatorium and resort basis, unique natural and medicinal objects, flora and fauna, historical and cultural monuments. Some architectural and artistic monuments of Ukraine are included in the UNESCO World Heritage List, which as of 2017 had 7 titles (approximately 0.65% of the total (1073) World Heritage sites) [10], which can be considered as an advertisement for attracting tourists.

However, in 2017, the share of Ukraine in the European market of inbound tourism was just 2.1 %, and in the all-European revenue from tourism activity only 0.25 %. Instead, in 2013, these figures were 4.4% and 1.0 % respectively. Significant differences in the structure of physical and cash flows indicate the low efficiency of Ukrainian tourism industry and the low level of use of available tourist resources. The unstable internal political and economic situation, the armed conflict in the east of Ukraine caused both the reduction of incoming tourists and the menacing decline in incomes in the industry.

In the rating of tourist competitiveness of the countries of the world Ukraine ranks rather low. Thus, in 2007, it ranked 78 (with the index of 3.89 out of 7 possible), in 2008-2009 - 77 (with the indexes of 3.76 and 3.84 respectively), in 2011 - 85 (with the index of 3.83), in 2013 - 76 (with the index of 3.98), in 2017 - 88 (with the index of 3.5) [6]. This state was not represented in the rating of 2015 as the study was not carried out. However, compared with the results of the 2013 study, we lost 12 positions.

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If we compare the position of Ukraine with the European countries, this state is beyond all the EU countries and is only ahead of Macedonia, Serbia, Albania, Bosnia and Herzegovina and Moldova. The development of tourism industry in Ukraine today is considerably inferior to the nearest neighboring countries of the European Union: Poland, Hungary, Czech Republic. For recent years, the European and world leaders in the travel and tourism sector have been Spain, France and Germany.

Today, Ukraine, in our opinion, can be attributed to countries with tourist product development of below average in the world and low in Europe, which does not sufficiently use the favorable preconditions for proper development of inbound tourism.

Ukraine has different rankings by the aggregated components of the Travel and Tourism Competitiveness Index. In particular, according to the TTCI-2017 [14], Ukraine's competitive advantages are health care and hygiene – 8th place (both in the world and in Europe); as well as (though with relatively worse positions) human resources and labor market (41 in the world and 25 in Europe); price competitiveness of tourism industry (45 in the world and 10 in Europe); cultural resources and business trips (51 in the world and 22 in Europe).

The worst rankings were held for such components of the TTCI as level of security in the country (127th place, the last among the European countries) and business environment (124th place, penultimate in Europe, behind was only Bosnia and Herzegovina).

For other components, Ukraine's rating is also low compared to European countries. For example, taking 81st place in the world in terms of infrastructure of information and communication technologies, this state is behind all European countries, except for Albania. In terms of environmental sustainability, with its 97th place, Ukraine has been ahead of only three European countries.

We also calculated the indicators of competitiveness of Ukraine in tourism sector under the method of Ushakov D.S., namely, the Registered Competitive Advantages ratio (Table 1). The calculations show a lower level of this ratio in 2017 compared to 2011, however, one can observe its growth compared to 2014. It should be noted that the RCA ratio in Ukraine is higher than the European average due to the significant share of the European region in global exports.

Table 1

*The Registered Competitive Advantages (RCA) ratio of Ukraine
in the European tourist market in 2011-2017*

Indicators	2011	2012	2013	2014	2015	2016	2017
Export of goods and services from Ukraine, bln USD	69,76	89,66	90,78	85,93	68,80	50,57	48,81
Export of goods and services from Europe, bln USD	8951,22	9031,74	9377,11	9489,0	8661,8	8326,27	8934,67
Share of Ukraine in the European export of goods and services, %	0,78	0,99	0,97	0,91	0,79	0,61	0,55
Arrivals of foreign tourists to Ukraine, mln persons	21,4	23,0	24,7	12,7	12,4	13,3	14,2
Arrivals of foreign tourists to Europe, mln persons	518,8	538,6	566,3	577,5	605,1	619,5	671,7
Share of Ukraine in the European arrivals of foreign tourists, %	4,12	4,27	4,36	2,20	2,05	2,15	2,11
Registered Competitive Advantages ratio, RCA	5,29	4,30	4,51	2,43	2,58	3,53	3,87

Source: calculated by authors based on the data [13; 18; 19].

Calculations of the foreign trade advantage of the tourism industry (Table 2) under the method of Volras T., presented in the scientific work of Illyasova Y.V. and Puchkova M.I. [4, p. 84], allow to conclude that in 2011-2012, Ukraine had minor relative advantages in foreign trade in tourist services (the RTA value was positive), and the negative values of the indicator in 2013-2017 indicate absence of advantages in Ukrainian foreign trade in tourist services.

Table 2

Indicators of the foreign trade advantage of the tourism industry of Ukraine in the European tourism market in 2011-2017

Indicators	2011	2012	2013	2014	2015	2016	2017
Export of goods and services from Ukraine, bln USD	69,76	89,66	90,78	85,93	68,80	50,57	48,81
Export of goods and services from Europe, bln USD	8951,22	9031,74	9377,11	9489,0	8661,8	8326,27	8934,67
Export of tourist services from Ukraine, bln USD	4,29	4,84	5,08	1,60	1,08	1,08	1,26
Export of tourist services from Europe, bln USD	419,9	407,8	440,7	473,5	409,98	416,03	459,4
Relative export advantage, RXA	1,31	1,24	1,19	0,37	0,33	0,43	0,50
Import of goods and services to Ukraine, bln USD	95,99	99,25	93,11	54,39	48,87	51,21	62,76
Import of goods and services to Europe, bln USD	8861,01	8555,6	8833,91	8981,05	7828,80	7859,20	8603,81
Import of tourist services to Ukraine, bln USD	4,46	5,1	5,76	5,06	5,10	5,97	7,13
Import of tourist services to Europe, bln USD	407,55	405,08	440,25	486,54	417,42	415,76	447,98
Relative import advantage, RMA	1,01	1,09	1,24	1,83	1,97	2,22	2,20
Relative foreign trade advantage of the Ukraine's tourism industry, RTA	0,30	0,15	-0,05	-1,46	-1,64	-1,79	-1,7

Source: calculated by authors based on the data [13].

In assessing, the level of competitiveness of Ukraine in the European market of tourist services, its positive and negative factors are summarized (Table 3).

Thus, the level of competitiveness of Ukraine in the European market of tourist services is low. Despite the presence of positive factors, one can observe prevalence of negative factors that reduce the competitiveness of Ukraine's tourism industry.

Table 3

Factors of Ukraine's competitiveness in the European market of tourist services

Positive factors	Negative factors
advantageous geopolitical position	significant physical and moral depreciation of the material base of tourism
natural resources: moderate climate, originality of natural landscapes, presence of flora and fauna	insufficient number of hotels and other means of accommodation with modern level of comfort that meet European standards
recreational resources: availability of diverse sanatorium and resort base, unique natural and medical objects	insufficient advertising and information support or no information at all in European countries about different places of Ukraine
cultural and historical resources	unsatisfactory state of security
moderate prices for European tourists	low quality roads
health care and hygiene	weak tourism management culture
human resources and labor market	inefficiency of marketing policy to promote Ukrainian tourist product to the European market

Source: compiled by authors based on [8, p.32; 11; 14]

The signing of the Association Agreement between Ukraine and the European Union in the tourism sector envisaged increased access to the European Union tourist market; creation of incentives to ensure the conditions of the European model in Ukraine; increasing its competitiveness in the European market with increasing investments, etc. Unfortunately, it is not possible to realize the intentions fully, both for objective and subjective reasons.

The lack of popularization of Ukrainian tourist recreation in the European market by the state institutions (today Ukrainian tourism is mainly advertised by travel companies and public organizations), low financial support, improper quality of services hinders the development of the tourism industry. That is why the problems of state regulation are extremely important.

Ukraine will be able to increase its share in the European market of tourist services by: improving and updating own tourist product, its new positioning in the market; revival of traditional tourist routes; dissemination of information on national traditions, crafts, museums and exhibitions; search and presentation of new tourist products (types of tourism); application of a complex of marketing strategies. There is a need to expand the ways of realization of tourist product, involving European tourists to new discoveries, obtaining new impressions. In order to create sustainable pay-as-you-go demand for national tourist services and customer loyalty, it is necessary to examine the needs and requirements of a European tourist to the maximum extent. Hereby, it is important to take into account both the demand of the so-called «mature» segment of the tourist market and the youngest tourists born at the turn of the 21st century.

The analysis carried out provides an opportunity to determine the ways of improving the state policy of tourism development in the process of ensuring the European integration activity of Ukraine, among which the important place belongs to: formation of an attractive tourist image of this country and its regions; improvement of legal principles of regulation in the tourism sector; facilitation of enterprises to develop tourism infrastructure, create new jobs; increase in the range of tourist services; introduction of effective financial and economic mechanisms to stimulate tourism and attract the EU investments to the most visited places; increase of attention to foreign tourists; distribution of advertising of tourist places of Ukraine abroad; deepening cooperation with international tourist companies; increase of expenses on marketing policy of promotion of tourist product to the European market; dissemination of information through online communication; conducting open youth forums to find new ideas for improving the tourism industry; improvement of the ecological situation, etc.

Solving the tasks to increase the competitiveness of this country in the European market of tourist services requires joint and close cooperation between state authorities, representatives of business structures and society. The state and businesses should: define the forms and methods of stimulating the development of entrepreneurship in the tourism sector; create an effective model of investment policy in the industry; introduce effective mechanisms of financial and economic regulation of tourism development. One of the areas of capital attraction is creation of economic and tax incentives and privileges, the introduction of which is a sufficiently effective means of reorientation of internal and external capital flows towards the tourism industry.

At the same time, it should be noted that creation of an image of Ukraine as a country favorable to tourism is the sole task of the state, since private businesses cannot conduct a non-commercial image advertising campaign throughout the country, as they promote and sell only their own products.

The mechanisms to promote Ukraine as a tourist country in the European market, and attract more European tourists include: participation in the largest European tourist and other exhibitions with the single national booth for presentation of the tourist product with involvement of the executive authorities of Ukraine; preparation of non-commercial advertising and informational printed matter and other products for distribution at the largest European tourist exhibitions and through Ukrainian foreign representations; engagement of domestic and foreign experts in tourism sector in the creation of tourism development programs with the aim of using the best European experience; dissemination of information about Ukraine as an attractive tourist country in the Internet; information support of various events held in Ukraine; organization of informational tours for European and national mass media; holding international conferences, symposiums, congresses and other events devoted to the tourist attractiveness of Ukraine. The main ways of forming competitive advantages of Ukraine in the European market of tourist services are reflected in Fig. 1.

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Fig. 1. Ways to increase Ukraine's competitiveness in the European market for tourist services

Source: systematized by authors based on [1; 2; 7; 8; 11].

Conclusions. The assessment of the competitiveness of Ukraine in the European market of tourist services (the Travel and Tourism Competitiveness Index, the Registered Competitive Advantages ratio and the Ratio of Relative Foreign Trade Advantage of the tourism industry) suggests that, despite the significant tourist potential, Ukraine today loses to European countries by many indicators of the competitiveness of tourist services and cannot compete with them. This is due to the fact that this state does not pay enough attention to this sector, does not rationally use its competitive advantages related to geopolitical position, existence of natural medical, historical and cultural resources that can attract foreign tourists. Ukraine is virtually non-competitive, primarily due to the lack of development of tourism and service infrastructure; inefficiency of state policy; absence of the formed attractive tourist image of the country.

Increasing the competitiveness of tourism sector is a key task of the economy of modern Ukraine. Achieving a high level of development of tourism and service infrastructure is possible only if sufficient investment is made into the most attractive tourist destinations of the country. It is important to direct efforts to create a positive image of Ukraine abroad as a country capable of providing tourists not only with the availability of cultural and natural objects for observance, but also with security, comfortable living and travelling conditions, reasonable pricing policy, and high standards of hospitality. At the same time, it is necessary to constantly work to improve own national tourist product, turning it into a competitive one, and promoting this product to the European and world markets of tourist services.

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