

ЕКОНОМІКА ТОРГІВЛІ ТА ПОСЛУГ

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ОЦІНКА КОНКУРЕНТОСПРОМОЖНОСТІ РЕГІОНІВ СВІТУ У СЕКТОРІ ПОДОРОЖЕЙ І ТУРИЗМУ

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ESTIMATION OF COMPETITIVENESS OF THE WORLD REGIONS IN THE TRAVEL AND TOURISM SECTOR

Мета. Дослідити засади та складові конкурентоспроможності регіонів світу в секторі подорожей і туризму, оцінити внесок туристичної галузі в соціально-економічний розвиток регіонів світу.

Методи. Дослідження базується на аналізі рейтингу конкурентоспроможності країн і регіонів світу, складеного на підставі індексу конкурентоспроможності сектора подорожей і туризму, запропонованого Світовим економічним форумом. Використано діалектичний метод наукового пізнання, а також комплекс загально-наукових методів гносеології: теоретичного узагальнення, графічного та історичного, групування і класифікації, методів статистичного і математичного аналізу.

Результати. Визначено складові конкурентоспроможності регіонів світу в секторі подорожей і туризму, виокремлено показники, які стримують зростання конкурентоспроможності туристичного сектора. Досліджено вплив туристичної галузі на соціально-економічний розвиток регіонів, обґрунтовано на цій підставі її роль у відновленні та підвищенні конкурентоспроможності господарства в період нестабільного економічного становища.

Наукова новизна. На підставі аналізу складових субіндексів ТТСІ визначено детермінанти конкурентоспроможності регіонів світу в секторі подорожей і туризму, обґрунтовано наявність взаємозалежності між конкурентоспроможністю регіону в секторі та туристичною привабливістю і внеском туризму в соціально-економічний розвиток.

Практична значущість. Проведений міжрегіональний аналіз складових конкурентоспроможності сектора подорожей і туризму дає необхідну інформацію для зіставлення й ефективного використання місцевих конкурентних переваг при прийнятті рішень у туристичному бізнесі та сусідніх галузях і видах діяльності, а також цінні дані для уряду при вдосконаленні умов розвитку сектора подорожей та туризму.

Ключові слова: конкурентоспроможність сектору подорожей і туризму, туристична галузь, регіони світу.

Introduction. In the context of globalization of the world economy is more urgent statement of M. Porter that «the scale of growing competition go beyond geographical boundaries of individual countries» [1, с. 27]. This statement is especially typical for international tourism, which includes inbound and outbound tourism, the main characteristic of which is the movement (travel) of persons outside their country of residence. The dynamic development of international tourism, permanent increase of social-economic importance of the tourism industry and its multiplier effect on related industries, is causing increased competition in the travel and tourism sector not only between individual producers and countries but also between regions of the world. In this context, there is an urgent need for a thorough analysis of the competitive position of the world regions in the travel and tourism sector, their main components and socio-economic consequences.

Latest research and publications analysis. The issues of regional competitiveness reflected in many research works of domestic and foreign scientists. O. N. Belenov, A. A. Anuchin consider basic concepts related to the competitiveness of countries and regions, the main factors and mechanisms of its improvement, V. P. Shorokhov, D. N. Kolkin explore the theoretical approaches to determining the competitiveness of the region and the factors that determining it, O. M. Tishchenko, I. V. Rozgon conduct comparative description of methodological approaches to assessing the competitiveness of the regions, S. V. Kupriyanov, S. N. Shevtsova analyze the effect of special economic zones on regional competitiveness, S. K. Harichkov, A. V. Dihich explore the factors of international competitiveness of the region in terms of innovative development. At the same time indicated researchers focus on the competitiveness of national regions rather than world regions. Almost absent theoretical and practical research of the competitiveness of world regions in tourism. A significant contribution to the development of this issue was made by the World Economic Forum, due to construction of methodology for determining the index of countries and regions competitiveness in the field of travel and tourism.

The goal of the article is to explore bases and components of competitiveness of the world regions in the travel and tourism sector, to assess the contribution of the tourism industry into the socio-economic development of regions.

Key research findings. The competitiveness of the travel and tourism sector contributes significantly to increasing productivity, achieving sustainable economic results, allows to support a high income level of employed in the tourism and related sectors. Imbalance and asymmetry of regional development in the sector of travel and tourism stems from their competitive advantages, which are provided by the presence of specific factors of regional competitiveness.

Every two years World Economic Forum carries out the analysis of. The countries and regions travel and tourism competitiveness is determined by using the methodology of calculation the Travel & Tourism Competitiveness Index (TTCI), which based on four subindexes: «Enabling Environment», «T&T Policy and Enabling Conditions», «Infrastructure», «Natural and Cultural Resources» [2].

To compare tourist markets all country were grouped into five regions according to the classification of the World Economic Forum:

1. Europe: Southern and Western Europe, Northern and Eastern Europe.
2. The Americas: North America and Caribbean, South America.
3. Asia-Pacific: Eastern Asia and Oceania, South-East and Southern Asia.
4. Middle East and North Africa.
5. Sub-Saharan Africa: Eastern and Southern Africa, Central and West Africa.

Table 1 shows the scoring components of the subindexes TTCI by region in 2014 within the range of 1 to 7, grade «7» is the maximum possible.

Table 1 – Components of TTCI subindexes by region of the world, 2014

	Europe	The Americas	Asia-Pacific	Middle East and North Africa	Sub-Saharan Africa
Subindex «Enabling Environment»					
1. Business Environment	4,61	4,16	4,65	4,69	4,14
2. Safety and Security	5,76	4,64	5,2	5,19	4,87
3. Health and Hygiene	6,2	5,06	5,14	5,24	3,32
4. Human Resources and Labour Market	4,9	4,37	4,62	4,35	3,82
5. ICT Readiness	5,04	3,94	4,06	4,38	2,71
Subindex «T&T Policy and Enabling Conditions»					
1. Prioritization of Travel and Tourism	4,76	4,66	4,74	4,33	3,99
2. International Openness	3,61	3,41	3,34	2,18	2,4
3. Price Competitiveness	4,19	4,6	4,75	5,27	4,71
4. Environmental Sustainability	4,47	3,9	3,61	3,74	4,17
Subindex «Infrastructure»					
1. Air Transport Infrastructure	3,43	2,99	3,48	3,01	2,13
2. Ground and Port Infrastructure	4,33	3,41	3,83	3,66	2,9
3. Tourist Service Infrastructure	5,14	4,35	3,68	4,1	3,03
Subindex «Natural and Cultural Resources»					
1. Natural Resources	3,09	3,48	3,52	2,29	2,87
2. Cultural Resources and Business Travel	2,57	2,26	2,85	1,77	1,37

Source: made by the author [2]

Most of the maximum values of subindexes components belongs to the European market, excluding the components of subindex «Natural and Cultural Resources», the highest scores under this direction takes Asia-Pacific region.

According to the table calculated subindexes «Enabling Environment», «T&T Policy and Enabling Conditions», «Infrastructure», «Natural and Cultural Resources» for Europe, the Americas, Middle East and North Africa, Sub-Saharan Africa and Asia-Pacific region.

The European region holds leading positions in the competitiveness of the tourism industry through maximum values of subindex «Enabling Environment» (5,3 points), «T&T Policy and Enabling Conditions» (4,26 points), «Infrastructure» (4,3 points) (Figure 1).

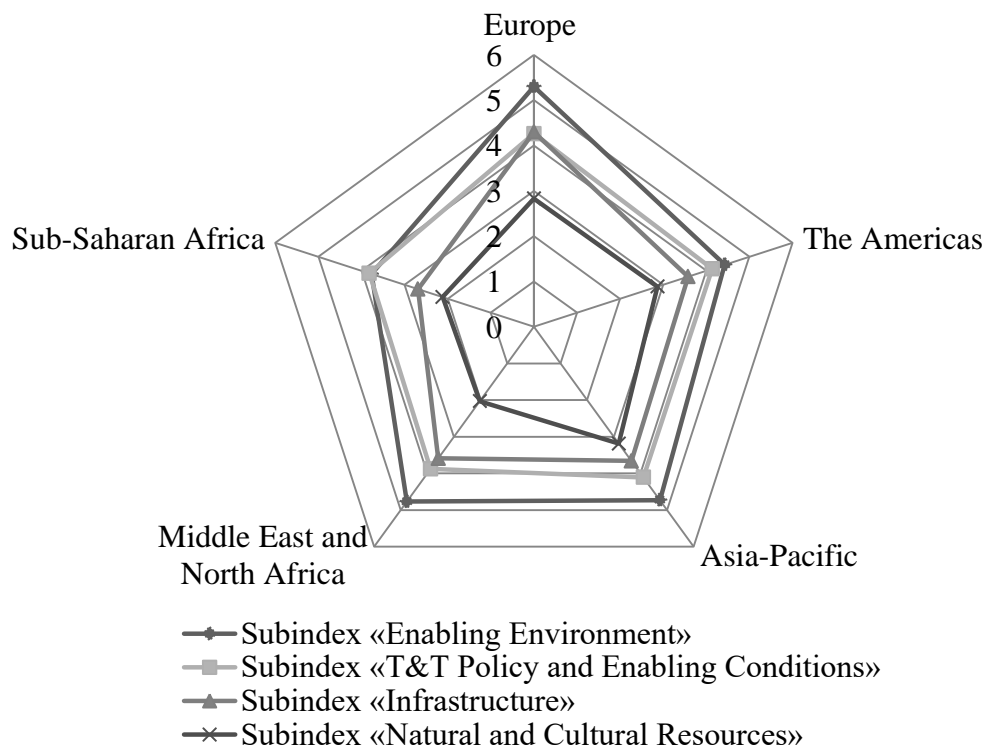


Figure 1 – TTCI subindexes within the range of 1 to 7 by the regions of the world, 2014

Source: made by the author [2]

The main components that ensure for Europe high score of subindex «Enabling Environment» were: «Safety and Security» (5,76 points), «Health and Hygiene» (6,2 points), «Human Resources and Labour Market» (4,9 points) and «ICT Readiness» (5,04 points). The high level of sub-indexes «T&T Policy and Enabling Conditions» provided components «Prioritization of Travel and Tourism » (4,76 points), «International Openness» (3,61 points) and «Environmental Sustainability» (4,47 points). The key indicators of subindex «Infrastructure» became «Ground and Port Infrastructure» (4,33 points) and «Tourist Service Infrastructure» (5,14 points).

Asia-Pacific undoubtedly competes for subindex «Natural and Cultural Resources» (3,19 points) by components «Natural Resources» (3,52 points) and «Cultural Resources and Business Travel» (2,85 points). The lowest ranking occupies Sub-Saharan Africa through no branching infrastructure, lack of favorable conditions for the development of industry and government support.

Europe, which accounts for 41 % of worldwide international tourism receipts, saw an increase in tourism earnings in absolute terms of US\$ 17 billion to US\$ 509 billion (euro 383 billion). Asia and the Pacific (30 % share) saw an increase of US\$ 16 billion, reaching US\$ 377 billion (euro 284 bn.). In the Americas, (22 % share), receipts increased by US\$ 10 billion to a total of US\$ 274 billion (euro 206 bn.). In the Middle East, (4 % share) tourism receipts increased by an estimated US\$ 4 billion to US\$ 49 billion (euro 37 bn.) and in Africa (3 % share) by US\$ 1 billion to US\$ 36 billion (euro 27 bn.) (Figure 2). By subregion, Northern Europe, Southern and Mediterranean Europe, North-East Asia, Oceania, South Asia, Caribbean, Central America, South America and the Middle East showed fastest growth in relative terms, all recording +5 % or over in receipts.

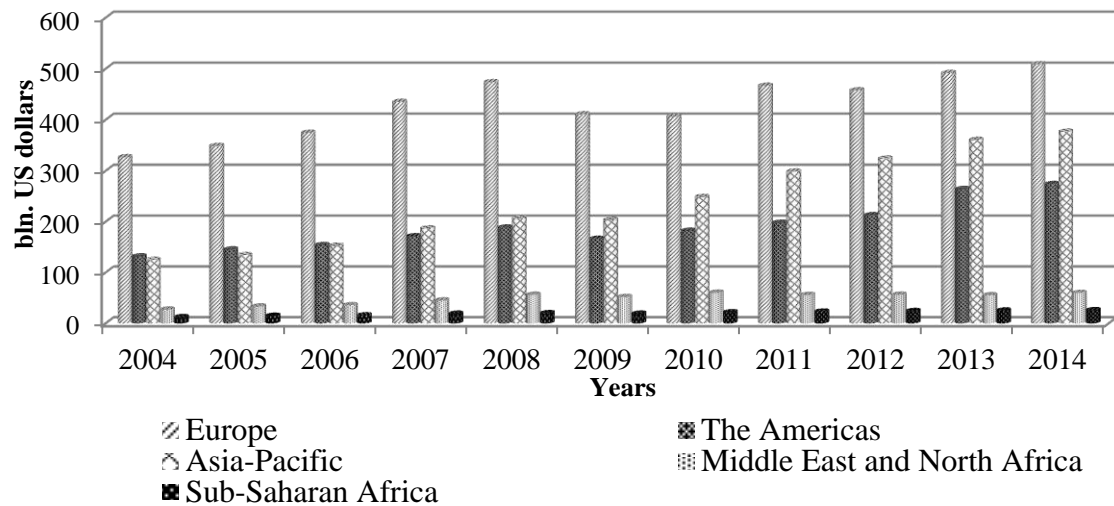


Figure 2 – International tourism receipts by the regions of the world, 2004-2014, billion US dollars

Source: made by the author [3–7]

In the top ten ranking by tourism earnings, China climbed from 5-th to 3-rd place following a 10 % increase in earnings to US\$ 57 billion in 2014. The United States (US\$ 177 bn.) and Spain (US\$ 65 bn.) maintained first and second positions in the ranking. The United Kingdom (US\$ 45 bn.) moved up two positions to 7-th, boosted by the lasting effects of the Olympics and the appreciation of the UK pound (increasing receipts calculated in US dollar terms). France, Macao (China) and Italy occupy the 4-th to 6-th positions respectively, while Germany, Thailand and Hong Kong (China) complete the top ten.

International tourist arrivals reached 1,138 million in 2014, a 4.7 % increase over the previous year. 2014 – is the fifth consecutive year of above average growth since the 2009 economic crisis (Figure 3).

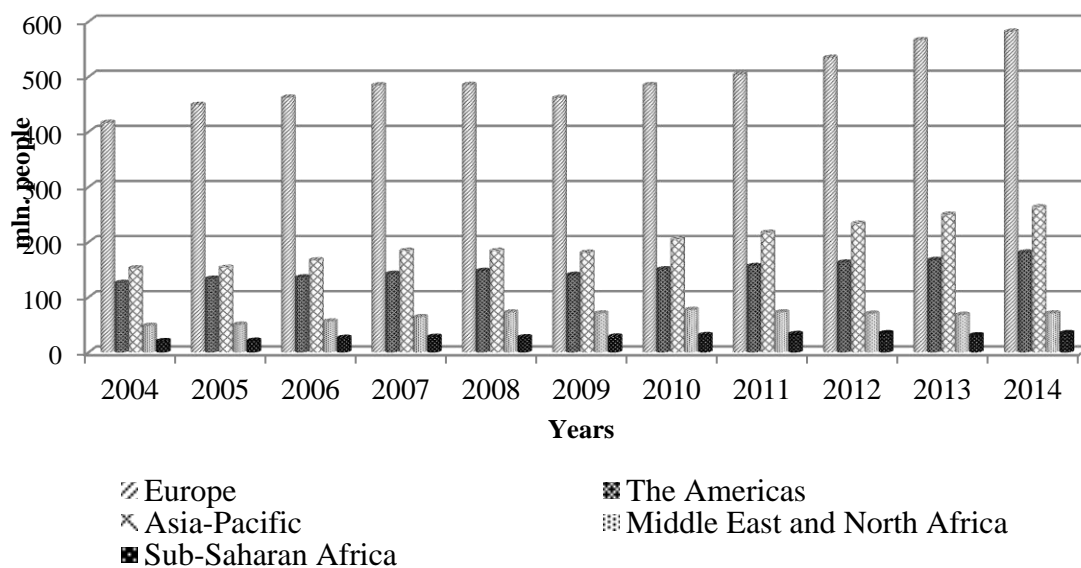


Figure 3 – International tourist arrivals by the regions of the world, 2004-2014, million people

Source: made by the author [3–7]

In 2014 the largest increase in tourist arrivals was noted in the region Sub-Saharan Africa (12.6 %) and the Americas (8 %), while Asia Pacific (5.4 %), Europe (2.7 %) and the Middle East (4.1 %) growth was more modest. By subregion, North America (+8%) saw the best results, followed by North-East Asia, South Asia, Southern and Mediterranean Europe, Northern Europe and the Caribbean, all increasing by 7 %.

The largest number of the employed in tourism observed in the Asia-Pacific region. Thus, in 2014 the total number of employed in the tourism industry in this region was 149.4 million, which is 3.5 times more than in America. However, the increased number of employed in the travel and tourism sector in the analyzed period is observed only in America – 5,81 % and Sub-Saharan Africa – 10.5 %, Europe, Asia Pacific and the Middle East and North Africa show a decline of 1.46 %, 2.37 % and 3.59 % respectively (Table. 2).

Table 2 – Number of employed in the tourist industry by the regions of the world, 2007–2014

Regions	2007	2008	2009	2010	2011	2012	2013	2014	Growth rate
<i>Direct contribution to employment, millions of jobs</i>									
Europe	13,8	13,5	13,3	13,2	13,4	13,6	13,7	13,9	0,98
The Americas	15,6	15,6	15,2	14,9	15,1	15,7	16,1	16,5	5,22
Asia-Pacific	60,4	60,4	58,8	59,4	60,4	61,5	62,9	64	5,85
Middle East and North Africa	5	5	5,2	5,5	4,9	5	4,7	4,9	–1,78
Sub-Saharan Africa	5,1	5,3	5	5	5,4	5,4	5,7	5,9	15,60
<i>Total contribution to employment, millions of jobs</i>									
Europe	35,7	35,3	35,3	34	34,3	34,4	34,6	35,2	–1,46
The Americas	40,1	40,4	39,3	38,3	39,1	40,3	41,3	42,4	5,81
Asia-Pacific	153,1	142,3	139,4	136,9	140,1	143,1	146,6	149,5	–2,37
Middle East and North Africa	11,6	11,5	11,8	12,6	11,1	11,3	10,7	11,2	–3,59
Sub-Saharan Africa	13	13,3	12,9	12,7	13,2	13,4	14,1	14,5	11,50

Source: made by the author [8]

In contrast to the tendencies of reducing the number of employed in tourism in some regions, the contribution of the tourism industry to GDP remains stable and is characterized by a gradual increase. According to the total contribution of the tourism industry to GDP first place is headed the Asia-Pacific region, both by direct volume – 2153,9 bln. dollars and by growth rate during the 2007–2014 years – 28.6 %, with small gap the second and third place is occupied America – 2141,1 bln. dollars and Europe – 2136 bln. dollars. Traditionally, the smallest contribution of the tourism sector to GDP in the Middle East and North Africa (282,44 bln. dollars) and Sub-Saharan Africa (114,78 bln. dollars). (Table 3).

Table 3 – Contribution of the tourism industry to GDP by the regions of the world, 2007–2014 pp.

Regions	2007	2008	2009	2010	2011	2012	2013	2014	Growth rate
1	2	3	4	5	6	7	8	9	10
<i>Direct contribution to GDP, bln. US dollars</i>									
Europe	727,8	772,6	679,5	677,6	750,3	718,5	756,9	779,6	7,12
The Americas	593	601	560	597,8	652,8	680,9	709,5	733,9	23,76
Asia-Pacific	410,2	452	458,3	517	595,1	642,5	667,5	694,1	69,20

Table 3 (continued)

1	2	3	4	5	6	7	8	9	10
Middle East and North Africa	74,75	89,32	88,66	100,6	103,0	110,3	107,43	112,53	50,54
Sub-Saharan Africa	29,25	33,29	29,66	33,09	37,4	39,8	42,42	44,49	52,10
Total contribution to GDP, bln. US dollars									
Europe	2119,8	2093,7	2003,6	2000,5	2063,9	2056,1	2089,3	2136	0,76
The Americas	1983,4	1987,5	1855,9	1866,5	1951,2	2026,5	2077,4	2141,1	7,95
Asia-Pacific	1674,9	1674,2	1705,6	1716,1	1790,9	1916,9	2043,8	2153,9	28,60
Middle East and North Africa	252,46	257,28	273,8	281,2	263,9	272,7	269,34	282,44	11,88
Sub-Saharan Africa	93,34	98,11	96,79	92,85	95,1	101,9	109,98	114,78	22,97

Source: made by the author [8]

A significant contribution of the tourism industry to GDP in Europe is characterized, however, slow growth – 0.76 %. The opposite trend demonstrated the countries of Sub-Saharan Africa and Middle East – 22.97 % and 11.88 % respectively. Data for Africa and the Middle East should be read with caution as it is based on limited and volatile data. Quite discreet and gradual, at the same time stable growth in America – 7.95 %.

Conclusions. Analysis of the countries and regions competitiveness in the world tourism demonstrates the leading position of European region in the ranking, compiled by travel & tourism competitiveness index. High competitiveness of Europe impact on the unquestioning leadership of the region by the number of international tourist arrivals (508,9 mln. people) and tourism receipts (508,9 billion US dollars). Due to these results tourism has become one of the main factors of economic recovery in Europe. Asia Pacific demonstrates the high competitiveness of tourism industry in areas of «Infrastructure» and «Natural and Cultural Resources». The largest number of the employed in the tourism industry in the region (149,5 millions of jobs) and its significant contribution to GDP (2153,9 billion US dollars), allows to state the presence of a significant positive impact of the tourism industry for the socio-economic development of the Asia Pacific region. Lowest competitiveness of the sector observed in the region of Sub-Saharan Africa, significant negative impact making a quality of ground and port infrastructure, unfavorable business climate and inappropriate use of natural and cultural resources.

Therefore, over the past years, tourism has proven to be a surprisingly strong and resilient economic activity and a fundamental contributor to the economic recovery by generating billions of dollars in exports and creating millions of jobs. This has been true for destinations all around the world. This statement is especially true of the European Region, as it consolidates efforts to overcome one of the most unfavorable economic periods.

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Цель. Исследовать основы и составляющие конкурентоспособности регионов мира в секторе путешествий и туризма, оценить вклад туристической отрасли в социально-экономическое развитие регионов мира.

Методы. Исследование базируется на анализе рейтинга конкурентоспособности стран и регионов мира, составленного на основании индекса конкурентоспособности сектора путешествий и туризма, предложенного Всемирным экономическим форумом. Используются диалектический метод научного познания, а также комплекс общенаучных методов гносеологии: теоретического обобщения, графического и исторического, группировки и классификации, методов статистического и математического анализа.

Результаты. Определены составляющие конкурентоспособности регионов мира в секторе путешествий и туризма, выделены показатели, которые сдерживают рост конкурентоспособности туристического сектора. Исследовано влияние туристической отрасли на социально-экономическое развитие регионов, обоснована ее роль в восстановлении и повышении конкурентоспособности хозяйства в период нестабильного экономического положения.

Научная новизна. На основе анализа составляющих субиндексов ТТСИ определены детерминанты конкурентоспособности регионов мира в секторе путешествий и туризма, обосновано наличие взаимозависимости между конкурентоспособностью региона в секторе и туристической привлекательностью, а также вкладом туризма в социально-экономическое развитие.

Практическая значимость. Проведенный межрегиональный анализ составляющих конкурентоспособности сектора путешествий и туризма дает необходимую информацию для сопоставления и использования местных конкурентных преимуществ при принятии решений в туристическом бизнесе и сопутствующих отраслях и видах деятельности, а также ценные данные для правительства при совершенствовании условий развития сектора путешествий и туризма.

Ключевые слова: конкурентоспособность сектора путешествий и туризма, туристическая отрасль, регионы мира.

Objective. To explore bases and components of competitiveness of the world regions in the travel and tourism sector, to assess the contribution of the tourism industry into the socio-economic development of regions.

Methods. The research is based on the analysis of countries and regions competitiveness rate that was compiled on the basis of the Travel & Tourism Competitiveness Index, proposed by the World Economic Forum. Dialectic method of scientific knowledge and complex of scientific methods, such as theoretical generalization, graphic and historical generalization, clustering and classification, methods of statistical and mathematical analysis are used.

Results. Components of competitiveness of the world regions in the travel and tourism sector were determined. Indicators that constrain the growth of the competitiveness of the tourism sector were singled out. The impact of the tourism industry on the socio-economic development of regions was investigated. The role of tourism in the restoring and enhancing of economy competitiveness during the unstable economic situation was justified.

Scientific novelty. Based on analysis of TTCI subindexes components the competitiveness determinants of the world regions in the travel and tourism sector were defined. Availability of interdependence between the region's competitiveness of the sector, tourist attractiveness and contribution of tourism to the socio-economic development were justified.

Practical value. Interregional analysis of the components of the travel and tourism competitiveness provides necessary information to compare and effective use of local competitive advantage in making decisions in the tourism business and related sectors and activities, and valuable for the government in improving conditions of travel and tourism sector development.

Key words: travel and tourism competitiveness, tourism industry, tourism.

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РИНОК ТУРИСТИЧНИХ ПОСЛУГ: ТЕОРЕТИЧНІ АСПЕКТИ

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TOURISM SERVICES MARKET: THEORETICAL ASPECTS

Метою статті є аналіз існуючих підходів до розуміння сутності поняття «ринку туристичних послуг», уточнення його визначення, встановлення характеру попиту і пропозиції на ринку туристичних послуг, надання характеристики туристичній послугі як об'єкту ринку туристичних послуг, уточнення класифікації суб'єктів ринку туристичних послуг.