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MODERN DEVELOPMENT TRENDS IN THE GLOBAL TOURISM MARKET

The article offers insights into the modern trends that shape a vector of world tourism services as well as provides an analysis of statistical profitability indicators of the global tourism market and quantitative indicators of tourist flows. It has been verified that quantitative indicators of tourist flows geography are directly dependent on the level of socioeconomic development of countries and regions which translates into their inequality. A survey on the dynamics of international tourist arrivals has allowed to identify the top global tourism leaders with a particular emphasis on the countries that are leaders in the area of business and entertainment tourism. Tourism has proved to be a profitable sector of the economy boosting investment, entrepreneurial and innovative activities of all tourism entities. The study findings have revealed that tourism is a catalyst for economic, social and cultural change as well as it has positive effects on society development worldwide. Apart from the above, statistical data have been investigated demonstrating that the tourism market contributes towards creating new jobs and additional capital injections from tourist flows. Evidence has been provided that the key trend in global tourism development is the creation of partnerships which further form transnational business structures that build their commercial activities based on franchise agreements. It is argued that globalization processes is a powerful driver enhancing the tourism market development. The study also offers an overview of the specific features of tourism industry development in Ukraine which prove to have promising development prospects within the frameworks of partnerships with foreign companies as well as in the format of independent entrepreneurship activities.

Keywords: *tourism; tourists; travelling; tourism services; tourism market; contract; services agreement; development trends; globalization; tourist arrivals; tourist capacity of Ukraine; tourism sector; internal tourism; tourism industry development; investment climate.*

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ТЕНДЕНЦІЇ РОЗВИТКУ СВІТОВОГО РИНКУ ТУРИСТИЧНИХ ПОСЛУГ

У статті проведено дослідження сучасних тенденцій, що формують вектор розвитку світового ринку туристичних послуг. Досліджено статистичні показники прибутковості світового ринку туризму та кількісні показники туристичних потоків, які залежать від рівня соціально-економічного розвитку країн і регіонів, що спричиняє їх нерівномірність. Здійснено аналіз динаміки міжнародних туристичних прибуттів та виокремлено країни – лідери у сфері міжнародного туризму. Окремо представлено країни, які є лідерами ділового та розважального туризму. Доведено, що туризм є прибутковою галуззю економіки, що стимулює інвестиційну активність, підприємницьку та інноваційну діяльність всіх суб'єктів сфери туристичних послуг. За результатами проведеного дослідження з'ясовано, що туризм відіграє роль каталізатора економічних, соціальних та культурних змін, а також позитивно впливає на розвиток соціуму країн. Крім того, досліджено статистичні дані, які свідчать про те, що ринок туристичних послуг сприяє створенню додаткових робочих місць та вливанню додаткового капіталу з боку туристів. З'ясовано та підтверджено фактами, що провідною тенденцією розвитку світового туризму є створення партнерських компаній, що утворюють транснаціональні структури, які будують свою комерційну діяльність на договорах франчайзингу. Наголошується, що процеси глобалізації, які відбуваються у світі, є потужним двигуном розвитку ринку

туристичних послуг. Виявлено особливості розвитку туристичного сектора України. Визначено, що вітчизняна сфера туризму має позитивні перспективи розвитку як у межах партнерських відносин з іноземними компаніями, так і у форматі самостійної підприємницької діяльності.

Ключові слова: туризм; туристи; подорожі; туристичні послуги; ринок туристичних послуг; договір; договір про надання послуг; тенденції розвитку; глобалізація; туристичні прибуття; туристичний потенціал України; сфера туризму; внутрішній туризм; розвиток сфери туризму; інвестиційний клімат.

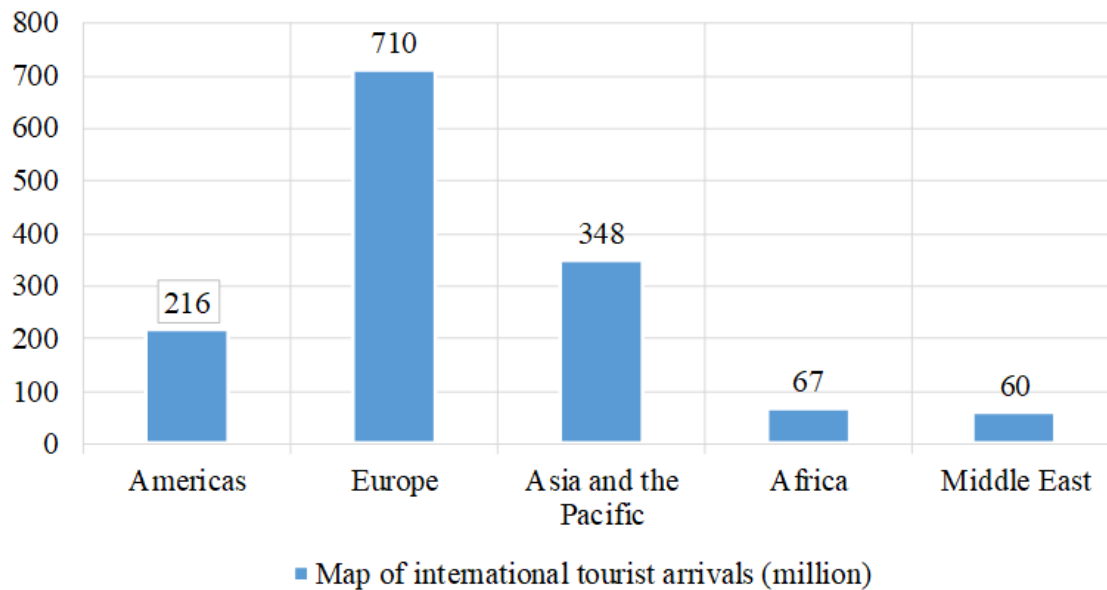
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ТЕНДЕНЦИИ РАЗВИТИЯ МИРОВОГО РЫНКА ТУРИСТИЧЕСКИХ УСЛУГ**

В статье проведено исследование современных тенденций, формирующих вектор развития мирового рынка туристических услуг. Осуществлён анализ статистических показателей прибыльности мирового рынка туризма, а также количественных показателей величины туристических потоков. Доказана прямая зависимость количественных показателей географии туристических потоков от уровня социально-экономического развития стран и регионов, что обуславливает их неравномерность. Произведённый анализ динамики международных туристических прибытий позволил выделить страны, являющиеся лидерами в сфере международного туризма. Отдельно представлены страны - лидеры делового и развлекательного туризма. Доказано, что туризм является прибыльной отраслью экономики, стимулирующей инвестиционную активность, предпринимательскую и инновационную деятельность всех субъектов сферы туристических услуг. В ходе проведённого исследования установлено, что туризм играет роль катализатора экономических, социальных и культурных изменений, а также положительно влияет на развитие социума стран. Кроме того, исследованы показатели статистических данных, свидетельствующие о том, что рынок туристических услуг способствует созданию дополнительных рабочих мест и вливанию дополнительного капитала со стороны туристов. Выведено и подтверждено фактами, что ведущей тенденцией развития мирового туризма является создание партнёрских компаний, образующих транснациональные структуры, которые строят свою коммерческую деятельность на основе договоров франчайзинга. Акцентируется, что мировые процессы глобализации выступают мощным двигателем развития рынка туристических услуг. Выведены особенности развития туристического сектора Украины. Определено, что отечественная сфера туризма имеет положительные перспективы развития как в рамках партнёрских отношений с иностранными компаниями, так и в формате самостоятельной предпринимательской деятельности.

Ключевые слова: туризм; туристы; путешествия; туристические услуги; рынок туристических услуг; договор; договор о предоставлении услуг; тенденции развития; глобализация; туристические прибытия; туристический потенциал Украины; сфера туризма; внутренний туризм; развитие сферы туризма; инвестиционный климат.

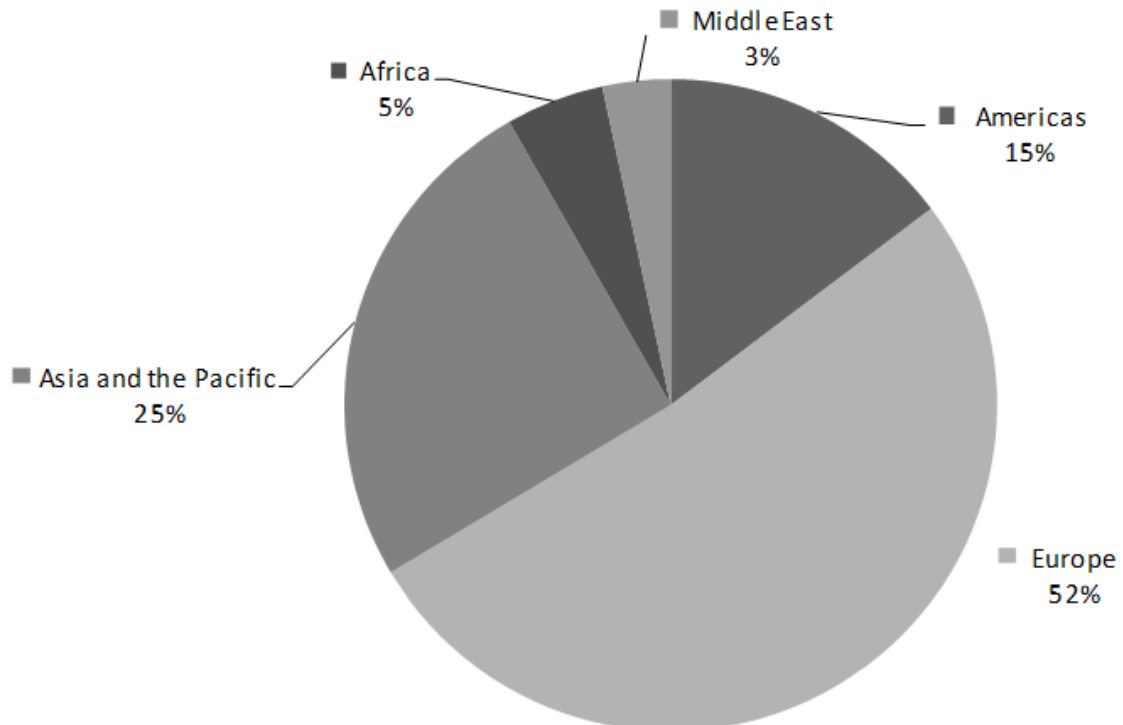
Statement to a problem. Tourism has gradually become a strategic sector of economic development. Tourism industry scaled up in the second half of the XX century and is starting now to affect international economic relations. According to statistical data, 25 million people were using tourism services in 1950, whereas this indicator was 592 million people in late XX century [10], 1.235 billion people in 2016, 1.322 billion people in 2017, and 1.4 billion in 2019 (Figure 1).



Source: [9, 10].

Figure 1. Indicators of number of tourists in the world of 2019

Global tourism industry is developing steadily. Europe accounts for 50.7% of global tourism market. America holds 15.4% and 33.9% are attributed to Asia, Africa and Australia (Figure 2).



Source: [9, 10, 12].

Figure 2. Distribution of the world tourist market on regions of the world in 2019, %

Tourism is a profitable business area. Estimates show that 10% of the global GDP come from tourism. Tourists are real investors in their destination country. Development of tourism contributes to creation of additional jobs. Almost every tenth person on the planet works in tourism

business. The study of trends in tourism development has to promote development of domestic tourism industry, stimulate entrepreneurial activities, and increase the country's competitiveness on the global stage.

Article purpose. The aim of this article is to study, define and generalize the contemporary state and global trends in tourism development.

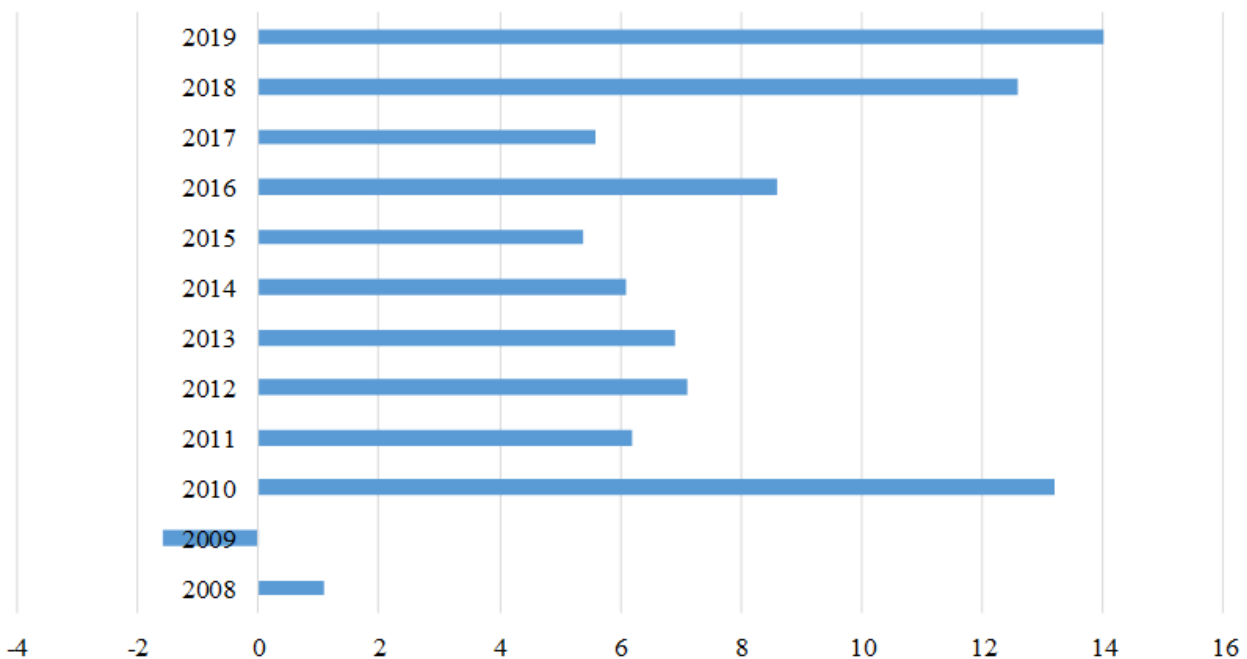
Matters of global and domestic tourism development have been considered in papers of such scholars as: G.V. Balabanov, A.A. Gerashchenko, L.P. Davidyuk, R.G. Korobyova, A.Y. Parfinenko, I.O. Stepanenko, N.O. Stepanenko, O.B. Shikina.

Main materials of a research. A high number of tourists visiting European countries is attributed to cultural, historical and natural landmarks present there, developed touristic infrastructures and a tradition of having an active holiday by travelling that is developed among European citizens. On average, 616.2 million people, which amounts to 49.9% of the global number of tourists, travel through Europe. Approximately 90% of tourists of those 616.2 million are Europeans.

According to statistical data, Spain, Germany, the Benelux, Italy, Greece, and Austria are the most popular with tourists, generating 20% of tourism revenue. Croatia, Bulgaria, the Czech Republic, and Montenegro account for around 11% of international tourism revenue.

The statistics shows that Mexico, Canada and the USA account for the biggest number of international arrivals in America.

The flow of tourists going to China and India has much increased over the last five years. In 2019, the Asia-Pacific region was visited by 348 million people (Figure 3).



Source: [9, 10].

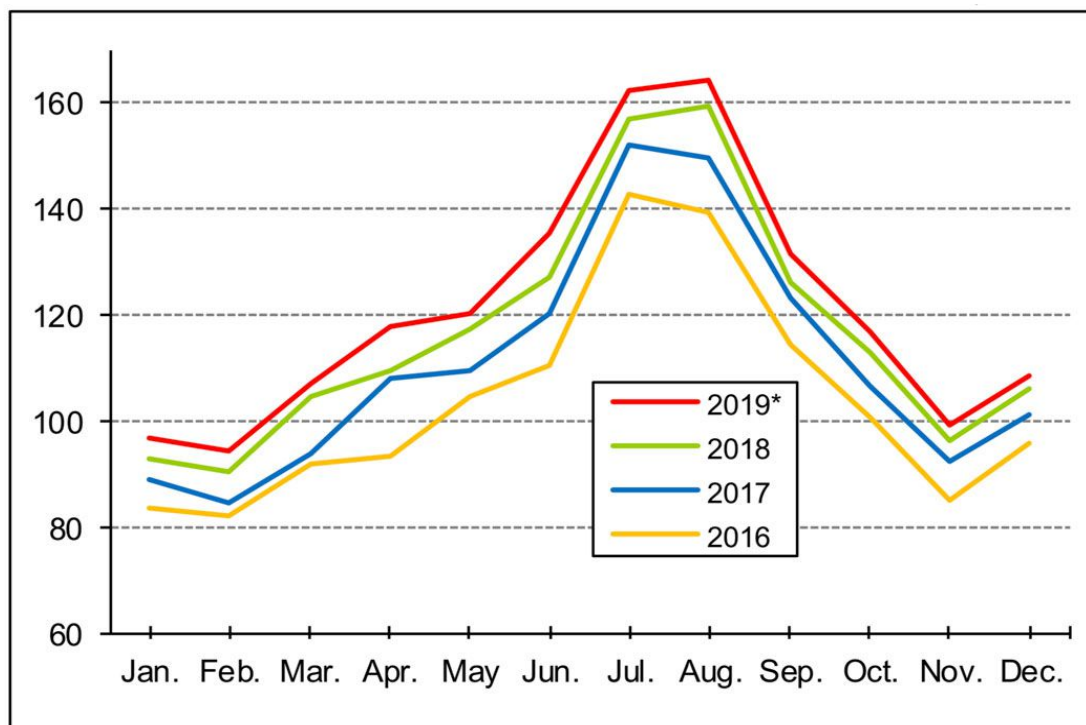
Figure 3. Rates of gain of tourist arrivals of the Pacific Rim of 2008–2019

The statistics demonstrates minor changes in the geographical structure of the market of tourism services. The biggest number of tourists visit France, the USA, Spain, China, and Italy (Figure 2). The prevalence of the number of tourists travelling to the countries of closely situated regions over those interested in long-distance travelling currently remains a sustainable trend in international tourism development.

The share of tourism exceeds 15% of the volume of global trade in goods and services. It is estimated that the cost of travelling will have amounted to USD 1560 million by 2020.

In accordance with the 2019 ranking compiled by Mastercard, which has been studying global trends in travelling and generating the Global Destination Cities Index over the past ten years, the number of overnight tourists grew by 76% in 2019 in comparison to 2009. The Asia-Pacific region demonstrates especially rapid dynamics. In 2019, Bangkok for the fourth time became No. 1 touristic destination in terms of the number of international visitors. In 2018, the city was visited by over 22 million tourists. Paris and London ranked respectively second and third in 2019, having over 19 million tourists each. Dubai tops the ranking in terms of the money spent by tourists, as they spend there on average USD 533 a day. Makkah ranked second, and Bangkok – third. Tourists spend the most time in Antalya (Turkey) and New York City (USA), staying there for 14 and 8 nights respectively. Ukraine is in top 3 countries, from which tourists go to the Turkish resort – Ukrainians account for almost 6% of travelers to Antalya.

Overall, the assessment of international tourist flows indicates an increase in international tourism (Figure 4), which will further contribute to global economic recovery. According to UNWTO forecasts, the share of international tourism will continue to increase in growing economies.



Source: [9].

Figure 4. International trips for 2019 – change on months, in the world (one million)

The number of international touristic arrivals will increase approximately two times faster (+4.4%) than in developed countries (+2.2%). The countries with growing economies (Latin America, Central, Eastern and Eastern-Mediterranean Europe, Asia, Africa and Middle East) will account for approximately 30 million arrivals a year, while the number of arrivals in conventional destinations (North America, Europe, Asia-Pacific region) will amount to approximately 14 million arrivals a year [9].

Industrial countries – South Korea and Taiwan – are becoming leaders in business tourism. After opening of new beaches on Southern coast and creation of unique cultural and entertaining programs, Thailand has become one of the most significant destinations in tourism industry. The fast-growing scope of travels to Africa and Middle East changes the global dynamics of tourism development.

In 2018, 20–30% of the total number of people travelling abroad were mass or group tourists, while the rest – 70–80% – were individual tourists. The trends of the recent years include changes in favour of mass tourism, which result from the following factors: increased free time; reduced prices for air travelling; increased number of charter flights for convenience of tourists travelling in groups; increased interest of travel agents in mass tourism as a business capable of generating major revenue; search for new cost-effective destinations, increased number of jobs in mass tourism; increased number of tourists travelling by buses due to low tour prices [3].

As far as Ukraine is concerned, development of the country's tourism industry was characterized by indicators of a rather dynamic entry of the country into the international tourism market. In particular, Ukraine is well ahead of developed countries in terms of growth of international revenue: the average annual growth rate of the tourism service market in developed countries was 6% per year, while in Ukraine it was 9%, which is close to the growth rate of the global tourism market in general, but slightly less than the growth rates of developing countries (10%).

According to studies of the International Organization for Public-Private Cooperation, Ukraine has improved its ranking in the Travel and Tourism Competitiveness Index by 10 spots during 2019–2020 and ranked there 78th.

According to the report of the World Economic Forum of the International Organization for Public-Private Cooperation, Ukraine “had the fastest rate of TTCI score growth in the subregion, rising 10 places to rank 78th globally. In particular, as the country stabilized and recovered economically, Ukraine drastically improved its business environment (124th to 103rd), safety and security (127th to 107th), international openness (78th to 55th) and overall infrastructure (79th to 73rd)” [11].

The 2019 Global Destination Cities Index allowed to analyze data for the past 10 years and identify the following key trends:

1) Consistent and steady growth of tourism. Over the past ten years, more and more people have been travelling and spending more money. The flow of travelers grows on average by 6.5% each year, with expenditure growing on average by 7.4%.

2) Dominance of major cities in the choice of a travelling package. Tourists often express their wish to visit a certain city. London, Paris and Bangkok, New York are the top cities that are eagerly visited by tourists.

3) Rapid rise of the flow of foreign tourists to the Asia-Pacific region. Cities of the Asia-Pacific region have demonstrated the biggest increase in the number of travelers from abroad since 2009, namely – 9.4%. In comparison, the increase in the flow of travelers to Europe was 5.5%. This was facilitated by the increase in the number of travelers from mainland China. Since 2009, China has moved up from the 8th to the 2nd place in the ranking of countries, citizens of which travel to the 200 destinations included in the Mastercard study.

With regard to the analysis, the major trends in development of global tourism industry are the increasing impact of global tourism on development of the labour market. Statistical indicators show that approximately 120 million direct jobs and 125 million indirect ones in related industries are created specifically by tourism industry. Developed countries of the world have intensified their investment activities in tourism-related industries, namely aviation, development of online travelling services, hotel, restaurant and catering business. Intensification of globalization processes

results in growth of travelling and tourism, which contributes to the increase in purchasing power and strengthening of a middle class in many developing countries. Tourism development promotes the formation and strengthening of positions of small and medium-sized businesses. The leading trend of the past five years is the processes of investments by economic markets of countries, where companies created through merging of related (partner) companies operate, and creation of transnational structures that service the tourism industry.

We consider it relevant to use forecasts provided by UNWTO. UNWTO specialists anticipate that the number of international touristic arrivals will increase to 1.5 billion people in 2020, and to 1.8 billion people by 2030. In 2020, East Asia and Pacific region are expected to become second popular international touristic destinations after Europe.

Inbound tourism will have the fastest rate of development, increasing in developing countries (+4.4%). The rate of tourism development in developed countries will grow slower (+2.2%). Developing countries have to gain 57% share of tourism market by 2030, and by 2020, revenues in this group of countries will have exceeded revenues from tourism in developed countries. Travelling and tourism industry need to remain crucial in the process of ensuring economic growth both in developed and developing countries.

The trend of increasing capital investments in global tourism market needs to remain sustainable.

The following trends are important for development of global tourism: cooperation of small and medium-sized travel enterprises; establishment of global hotel chains; informatization of the global market of tourism services; customization of provision of tourism services and increased requirements to the quality of touristic product; enhancement of relations between the global market of tourism services and other markets.

A specific trend in the development of Ukrainian tourism market is the activity of Western travel corporations: Turtess Travel LLC, which is a part of Turtess Tourism holding, Coral Travel LLC – a part of the international OTI Holding A.S., TUI Travel PLC and Voyage-Kyiv LLC, which work on a franchise basis.

Conclusion. The study of trends in the development of the global market of tourism services has found the following:

1) Regional distribution of the global market of tourism services is changing in view of the increased interest in the Asia-Pacific region. The interest of tourists in travelling around Europe and visiting such cities as London, Paris, Bangkok, New York remains constant.

2) The growth of the global market of tourism services remains stable, both in terms of the number of travelers, and in terms of capital financial investments.

3) The market of tourism services has developed a tourism industry, which serves as a catalyst for development of sustainable and open international relations, stimulates development of economies of countries that are participants to the tourism service market, promotes the creation of competitive tourism industries in countries that are participants to the tourism service market, promotes the acceleration of world globalization.

4) The low ranking of domestic tourism product remains stable, which is evident in poor quality of professional level of national specialists, imperfection of tourism infrastructure, flaws in legislation that regulates operation of the market of tourism services and protection of business environments, lack of proper funding from the state, hostilities in Eastern Ukraine. The above stated facts indicate that Ukraine has a strong potential for tourism activity and development.

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