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GLOBAL TRENDS OF TOURISM DEVELOPMENT

The article analyzes tourism industry development trends in the context of globalization, widely available information, political and economic instability and terroristic threats. The factors influencing the development of the global tourism industry have been determined. The factors that will shape the geography of touristic flows and destinations in the coming years have been listed and trends must be taken into consideration for the creation and improvement of any developmental strategy for a tourism destination.

Keywords: international tourism, global tourism trends, tourism industry, ETourism, online travel.

Романова А. Глобальные тенденции развития туризма. Проанализированы мировые тенденции развития туристической индустрии в условиях глобализации, информатизации, политико-экономической нестабильности и террористической угрозы. Определены факторы, влияющие на развитие мировой туристической индустрии, а также тренды, которые будут формировать географию туристических потоков и дестинаций ближайшие годы. Исследованы основные трансформации в структуре глобального туристического спроса.

Ключевые слова: международный туризм, мировые туристические тренды, туристическая индустрия, ETуризм, онлайн-путешествия.

Background. In December 2015 the United Nations General Assembly declared 2017 as the International Year of Sustainable Tourism for Development. On the one hand, this event provided a unique opportunity for national tourism products formation and promotion, but on the other hand, tourism destinations even more than before come across with the modern challenges influencing tourism industry. Global civilization processes led to transformations of states socioeconomic development models. The improvement of information technologies, scientific progress, demand for security, healthcare and longevity as well as an industry of impressions lead to behavior reaction changes for tourism services consumers and to new modern trends appearance in tourism industry. The problem is that a certain part of tourism field subjects including the tourism destinations may not be ready to new trends of service market structure models formation, which could lead to reduction of own tourism products

competitiveness. Thereby, in order to maintain and increase the index of tourism competitiveness of subjects of tourism industry it's important to constantly monitor the world trends of tourism industry development in terms of modern service market and to create such tourism development strategies, which could be reasonable towards the global transformations.

Actual scientific researches and publications analysis. The research of modern trends in tourism in modern models of service market organization is actual for leading world economic organizations. Such international authoritative organizations as World Economic Forum [1], United Nation World Tourism Organization [2] and World Travel & Tourism Council [3] present annual reports with the analysis of current state and the forecast of global tourism industry development.

In the field of Ukrainian science such scientists as G. Mykhailychenko [6], T. Tkachenko [12], V. Fedorchenko [13] and S. Cherneka [14] study the problem of international tourism trends and innovations of tourism industry.

The **aim** of the work is to determine and to analyze the world trends of tourism development in terms of modern paradigm of socioeconomic development as well as discover the factors, which influence the development of world tourism industry and, thereby, must be counted while designing and improving the strategy of any tourism destination and tourism object development.

Materials and methods. In the course of the study, the following methods were used: economic-statistical and induction to carry out a dynamic analysis of global trends in the development of tourism industry based on benchmarks; empirical (observation) to study the behavior of target consumers of tourism services in the context of changes in demand; forecasting to determine the factors that will affect the growth of the tourism industry in the global world economy in the future; logical and comparative analysis to determine the main transformations in world tourism demand; analysis and synthesis to formulate substantiated conclusions based on research results.

Results. International travels in 2016 reached the number of 1.235 billion arrivals, that is 46 million foreign trips more than in 2015 (an increase of 3.6 %) [2]. Thus, starting from 2009 the global tourism sphere has been constantly rising, the growth rate of which is increasing in average by 4 % every year.

In general, the world tourism industry in 2016 generated \$7.6 trillion (10.1 % of world GDP) and maintained 292 million jobs, which is equal to 1 to 11 jobs in the system of global labor market [3]. The dynamics of travel and tourism in 2017 remain positive, despite economic and political instability. Forecasts of GDP growth in the tourism sector anticipate the outgrowth of world GDP.

World tourism account for about a third of world exports of services, that is more than 6% of total exports of goods and services [3]. These

figures indicate the large volumes and scale of the global tourism industry (figure 1). Tourism as the export category is ranked fourth in the world after fuel export, chemicals and food, but at the same time, ranked first in many developing countries.

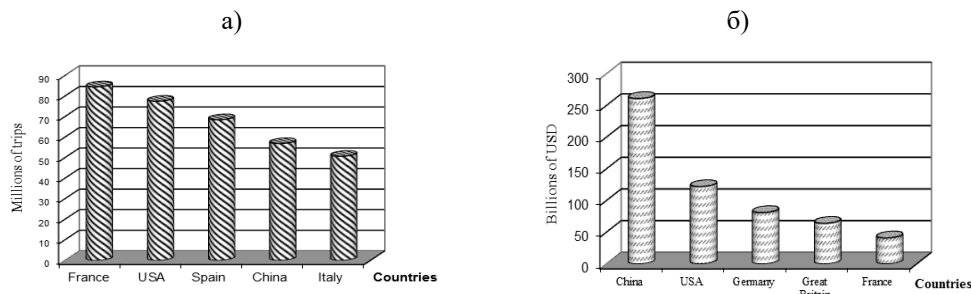


Figure 1. Top 5 tourism countries in 2016

- a) The most popular countries of tourism destination
- b) The most consuming active tourists during the trip are from these countries

The largest growth of the tourism sector is observed in the Asia-Pacific region (APR or the Pacific Rim), where the growth was 8 %. Even though Europe continues to occupy a leading position as a tourism destination, and it accounts for half of all travels in the world (figure 2), the slower growth of traveling to European countries should be noted (increase of 2 %).

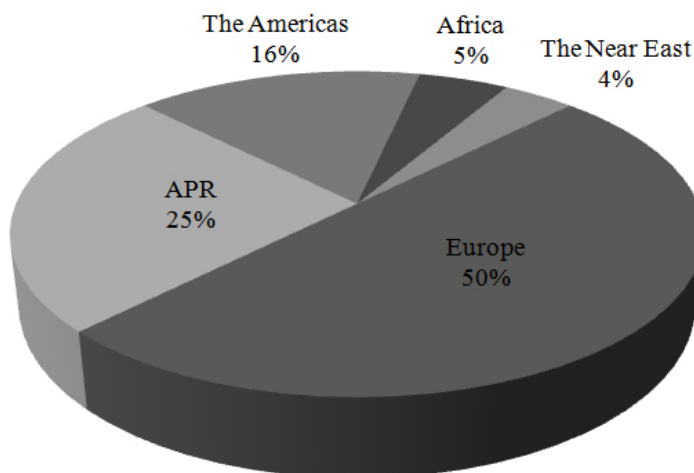


Figure 2. The structure of the geographical international tourist flows distribution [7]

It's important to say that during the period of 2010–2016 several countries experienced a high increase of revenues from tourist flows. Such countries as Myanmar, Sudan, Azerbaijan, Qatar, Sao Tome and Principe, Sri-Lanka, Cameroon, Georgia, Iceland and Kyrgyzstan (Figure 3). Those

countries succeeded in achieving such blissful results due to an effective state strategy of development, emphasizing the tourism as a prospect direction of economic development, increasing the expenditures for country tourism resources promotion, investing in a tourism infrastructure etc.

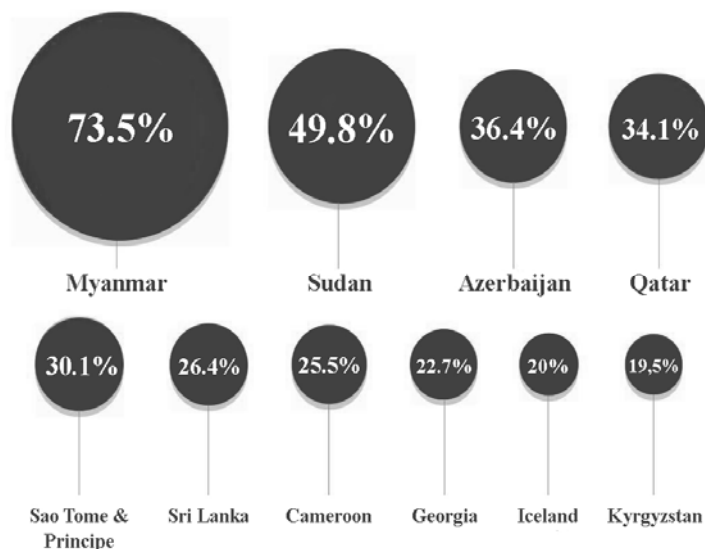


Figure 3. The numbers of average annual visitor exports growth (2010–2016) [9]

The comprehensive study of the current state, problems and trends of the tourism industry is conducted annually by international organizations such as the World Economic Forum [1], the United Nations World Tourism Organization [2] and UNESCO World Tourism and Travel Council) [3]. Based on the analysis and comparison of the annual reports of these organizations on travel and tourism, one can identify factors that will influence the growth of the tourism industry, determine the geography of tourist flows and the global trends in the development of the tourism industry.

Factors, which will affect the tourism industry development growth in global world economy:

- the gradual global economic crisis recovery, the growth of purchasing power;
- behavioral stereotypes changes, popularization of the traveling culture among a wide range of consumers;
- reducing the cost of tourism services due to falling prices for oil and energy, and as a result cheaper transportation and energy costs in accommodation facilities;
- further processes of globalization that will lead to the liberalization of visa regimes between many countries and the "erosion of borders" and obstacles to move and to travel;

- robotizing and automation of processes, the use of artificial intelligence will lead to the release of many people who will receive basic income, but will have enough free time for tourism and travel.

Besides, there are several factors, which influence the geography of tourist flows and destinations:

- a level of security for a certain tourism destination;
- some currencies stabilizing in relation to other national currencies, which will affect the level of tourists purchasing power both in terms of growth and downward;
- activity of a certain tourism destination to increase its own tourism competitiveness. Priority of the tourism industry development for the state (local) authorities of the country (destination).

Global trends in tourism industry development:

- the growth of the international tourism industry transnationalization, accompanied by the implementation of joint programs and the formation of global corporate associations;
- unprecedented scale and comprehensive nature of the tourist traffic;
- formation of a single world tourism market;
- informatization of various tourism industry sectors, which is locked up in the global Internet information network;
- increase of competition in the world and regional markets;
- implementing of innovation paradigm as a factor of competitiveness in tourism practice.

Basic transformations in world tourism demand.

A change of geographical international trips distribution. As mentioned before, there is a gradual redistribution of tourist flows to the growth of tourism destinations in the Asia-Pacific region and the America. These trends are primarily caused by the policy of liberalizing the outbound tourism and encouraging traveling in the People's Republic of China. Only in 2016, the number of the Chinese citizens traveling abroad has reached more than 122 million people who have spent abroad \$ 109.8 billions [8]. Countries that the Chinese choose as tourist destinations are primarily located in the APR. The reasons of tourist flows growth in the Americas are primarily caused by the stabilizing the US dollar, which leads to an increase of traveling of US citizens to the countries of Central and South America.

In addition, there is a tendency of reducing the growth of tourism attractiveness in such traditional destinations as Europe (*table*). This is caused by both the over-saturation of the market and the change of popular tourism types: therapeutic, recreational, active and adventure types of tourism replace traditional cultural and cognitive tourism. Thereby, the countries that chose the healthcare direction as one of the priorities (Turkey, India, Thailand, Bali), as well as exotic countries, become competitive destinations.

Table

Dynamics of revenues from international tourism by regions in 2015

World regions	Amount of revenues (billion USD)	Growth compared to the previous year	
		in absolute numbers (billion USD)	in relative numbers (%)
Europe	509	17	3
The Asia-Pacific region	377	16	4
The American region	274	10	5
The Middle East	49	4	8
Africa	36	1	2.8

Developed by the author after (2)

Prevailing of the online sales of tourism services. With the rapid development of information technology, such services as booking tickets for the tourists and luggage transportation, booking places in accommodations, tour choice and organization of leisure time during the travel are increasingly implemented through Internet services. There is a new global form of tourism product (services) implementation – *ETravel*. In particular, the share of the Internet sector in the field of tourism have increased by 1700 % in 2011–2015 and more than 45 % of tourists use their smartphones to book a tour [9]. Over the next four years, another 1 billion people around the world will switch to the online market, and it should be borne in mind that for the vast majority of consumers, the only personal digital device in use will be a smartphone [10]. Consequently, it is now necessary to consider the trends in the creation of electronic portals for the tourism services sales.

There is a fast market conquest of the following online services: Ctrip, Booking, Tripadvisor etc. However, the informatization of space has led to the emergence of so-called "virtual tours", that is traveling online without actually staying in that certain place. Google has developed and launched several approaches for online traveling from almost all of the world's most attractive spots: Google TourBuilder (Self Travel Planning), Google Street View (Virtual Tours of Tourist Cities), Google Earth (Earths and Geolocation through Space Satellites) and Google Maps (Global Navigation) based on their own Internet Services. In particular, Google has developed an online 3D tour of open-air Ukrainian museums. The pace of popularity of virtual tours is growing rapidly: in July 2017, a trip to the International Space Station was made available through the Google Street View portal. On the one hand, this trend is inevitable in globalization and informatization, but on the other hand, it is a certain threat and challenge for the existence of the tourism industry as such. After all, with the popularization of new ways to travel "without leaving home" the proportion of real tourist flows decreases. Thus, virtual tours are one of the inevitable threats to the global travel industry.

The growth of individual travels. The individual tours and personalization of tours are becoming increasingly popular with the expansion of

the services global market and the improvement of quality. The personification of tours means an individual selection of tourist services components, which comprise a tourist product by a traveler according to his needs. An online portal Zruchno.travel for organization of travels on your own within the country has now been created for the Ukrainian tourists. At the same time, the development of Internet services has contributed to the development of independent travels, the emergence of so-called "Selfie-tourists". Group tours currently are common only for the Chinese market. However, the tendency towards an independent organization of travels will continue to grow, so traditional travel companies should reorient themselves to the needs of the market: transfer services into online, change business models and channels of communication with potential customers.

Growth of the health-improving tourism segment. Increased life expectancy in developed countries, the cult of youth and longevity led to a rapid increase in demand for health and wellness travel. Income from medical tourism increased from 40 billion of USD in 2004 to 500 billion USD in 2012, which represents 14 % of the total revenues from the tourism industry (3 trillion 200 billion USD) in general, or 1.8 % of world GDP. In the developed countries of the world, the health-improving sphere forms a significant part of the state's economy. According to the US Census Bureau, the annual income of the healthcare sector in 2012 was about 1.7 trillion USD. World Bank data indicates that healthcare costs in the European Union may increase from 8 % of GDP in 2000 to 14 % by 2030 [11].

Increasing the demand for individual temporary accommodation compared to hotels. Tendencies of personification, individual tours, diversification of personal food (vegetarianism, special diets etc.) and the development of amateur tourism have led to an increase of demand for individual temporary accommodation facilities, such as apartments, villas etc. Large hotels networks are already considering this trend and designing new hotels as a collection of self-catering apartments and a separate entrance.

Increasing the demand for security. Civilization challenges related to terrorism, military conflicts, political instability and natural disasters caused the increased demand for security during tourist trips. World-renowned organization The World Economic Forum (WEF) annually publishes a country-by-country report on security in tourism. Thereby, according to the 2016 report, the safest countries for tourism and travel are Finland, OAU, Iceland, Hong Kong, Singapore. Instead, Ukraine in 2016 entered the top ten most dangerous countries for travel and tourism, along with countries such as Colombia, Yemen, El Salvador, Pakistan and Nigeria [1]. Thus, states that have strategically identified tourism as a priority area of development need to adjust the factors that affect the safety performance of traveling.

The growth of ecotourism needs and compliance with the conditions of friendly environment. The so-called eco-marketing has become a global modern trend in the market of goods and services. More and more consumers are choosing environmentally friendly goods and services. This is caused by both the cult of a healthy lifestyle and to the desire to protect the environment. Similar changes in the behavior and lifestyles of potential tourists have resulted in the growth of popularity of ecotourism, rural tourism, and ecofriendly accommodation. In addition, the types of transport that are the least polluting environment: bicycle, segway, water transport etc., are gaining popularity. Especially among inhabitants of megacities there is a growing demand for rest in rural farmsteads and farmers' food.

Next year tourists around the world will pay more attention to the social responsibility of tourism, namely, they will look at the environmental, economic and social effects they make in the place of visit. Today social campaigns have been launched around the world, aimed at cultivating similar values and motivations for travel. But similar information campaigns, on the other hand, can reduce long-distance travel, as a modern traveler will be inclined to stay close to home to reduce carbon footprint emissions. Today, the tourist business should reorient to such business models, where there is a strong awareness of the impact on the environment and the contribution of each individual tourist to the restoration of Earth's resources.

The emergence and differentiation of new types of tourism. Modern challenges of civilization processes, unceasing scientific and technological progress, rapid development of the information environment, growth of consumption, demand of society for beauty, longevity and, at the same time, globalization and radicalization of socio-political processes have led to the emergence of new types of tourism, such as space tourism, shopping tourism, wedding tourism, gastronomic tourism, political tourism, sentimental tourism, yoga tours and beauty tours, anti-aging tourism etc. In addition, the concept of the industry of impressions, which is typical of post-industrial society, appears and extends.

One of the typical trends is the isolation of new directions from the traditional types of tourism. For example, health-improving tourism is now divided into many powerful segments: medical tourism (which in turn is subdivided into other types, such as dental, reproductive etc.), wellness & SPA tourism, whose purpose is health improvement with physiotherapy and balneological procedures, beauty-tourism, which aims to improve appearance, weight loss, detoxification etc., anti-aging tourism, aimed at restoring youth and longevity. Event tourism is also divided into festival, wedding, movie tourism, and religious tourism already contains such areas as spiritual, pilgrimage, sentimental, tours to places of power etc.

Changing the socio-demographic portrait of a tourist services consumer. On the one hand, a new generation of young people born in the 2000s (the generation of Millennials, "millenials") will be the newest

category that will dictate the trends of tourism demand over the next 20 years, but on the other hand, there is a phenomenon such as the aging of tourists, namely traveling on retirement.

Understanding of behavioral reactions of new tourist categories and their needs is a necessary condition for the development of tourist destinations and the successful functioning of the tourism industry. So, the millennial generation uses online travel planning services, but as a rule, can not determine its own needs for a tourist trip, actively uses social networks, enjoys photographing places of visit (mostly on a mobile phone), prefers active leisure activities and has an unstable income. As for traveling pensioners, they are usually conservative and tend to use a live conversation with the travel agent. This is the category of tourists who will be using the outdated business models in tourism for a few more years, characteristic of the end of the XX century.

As for the sex specifics, the female travelling is gaining popularity. Today, about 80 % of decisions about a trip are taken by the women. Earlier a woman made a decision and motivated her companion or family to travel, but now more and number of women travelling alone is increasing. According to research, 72 % of American women made single trips in 2014 [10].

Change of the duration and frequency of travels. The rapid course of events, the acceleration of the pace of life and the liberalization of visa procedures led to a tendency to shorten the duration of international travel, but increase their periodicity. Tourists began travelling more often (2–4 times a year on average), but the terms of one trip have decreased (to 2–7 days). The weekends remain the most popular travel choice for the European countries while the duration of the trip is longer (7–10 days) for the countries of the Asia-Pacific region, which is due to the health and recreation goal of the trip.

To increase international tourist flows, the world tourism community represented by the World Tourism Organization (UNWTO) has formulated several *main challenges facing the countries over the next decade* [2]: enhancing the shared responsibility and coordination role of the governments of the countries that are contributing to the development of tourism; organization of safety and timely provision of tourists with the necessary information; increasing role of state policy in the field of tourism; strengthening the role of public-private partnership; the need for state support and financing of tourism development, first of all promotion of tourist product and development of tourist infrastructure;

Conclusion. Thereby, as a result of the study, the following main global trends in the development of modern tourism have been identified: change in the geographical distribution of international travel; predominance of online tourism services sales; increase in the share of individual trips; growth of the medical and health tourism segment; increase in demand for individual temporary accommodation establishments; actualization of

the need for security; growth of the needs of ecological tourism and compliance with friendly environment; emergence and differentiation of new types of tourism; change of socio-demographic portrait of tourism services consumer; change in the duration and frequency of travel etc. To increase the effectiveness of the tourism development strategy of any tourist destinations, it is necessary to take into account the above-mentioned world trends of the tourism sector development within the structural model of the modern services market.

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Романова А. Глобальні тенденції розвитку туризму.

Постановка проблеми. Глобальні цивілізаційні процеси обумовили трансформацію соціально-економічних моделей розвитку країн. Удосконалення інформаційних технологій, науковий прогрес, запит на безпеку, здоров'я та довголіття, а також індустрію вражень приводить до зміни поведінкових реакцій споживачів туристичних послуг та появи нових тенденцій у туристичній індустрії. З метою збереження та збільшення індексу туристичної конкурентоспроможності суб'єктам туристичної індустрії важливо постійно відслідковувати світові тенденції розвитку туристичної індустрії у контексті сучасного ринку послуг та створювати такі стратегії туристичного розвитку, що будуть адекватні глобальним трансформаціям.

Метою статті є визначення та аналіз світових тенденцій розвитку туристичної індустрії в умовах сучасної парадигми соціально-економічного розвитку, а також дослідження чинників, які впливають на розвиток світової туристичної індустрії.

Матеріали та методи. У статті використано такі методи наукового дослідження: економіко-статистичний та індукції, емпіричний (спостереження), прогнозування, логічного та порівняльного аналізу.

Результати дослідження. Проведено аналіз світових тенденцій розвитку туристичної індустрії в умовах глобалізації, інформатизації, політико-економічної нестабільності та терористичної загрози. Визначено чинники, які впливають на розвиток світової туристичної індустрії, формуватимуть географію туристичних потоків та дестинацій у найближчі роки. Досліджено основні трансформації у структурі глобального туристичного попиту. Визначені тенденції обов'язково повинні враховуватись при створенні та вдосконаленні стратегії розвитку будь-якої туристичної дестинації та туристичного об'єкта.

Висновки. Виокремлено основні глобальні тренди розвитку сучасної туристичної індустрії: зміна географічного розподілу міжнародних подорожей; домінування онлайн продажів туристичних послуг; збільшення частки індивідуальних подорожей; зростання сегмента лікувально-оздоровчого туризму; актуалізація попиту на індивідуальні заклади тимчасового розміщення; актуалізація потреби у безпеці; зростання потреби екологічного туризму та відповідності умовам дружнього до природи середовища; поява та виокремлення нових видів туризму; зміна соціально-демографічного портрету споживача туристичних послуг; зміна тривалості та періодичності подорожей тощо. Для збільшення ефективності стратегії туристичного розвитку будь-якої туристичної дестинації та туристичного об'єкта необхідно враховувати зазначені світові тенденції розвитку туристичної сфери в структурних моделях організації ринку послуг.

Ключові слова: міжнародний туризм, світові туристичні тренди, туристична індустрія, Е-туризм, онлайн подорожі.

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RESILIENCE OF THE SECTOR OF STATE GOVERNMENT

The essence of the sector of state government and signs of its resilience are considered. The estimation of the resilience level of the state-owned sector for 2008–2016 was carried out and the main shock effects that occurred in the investigated period were determined.

Keywords: resilience of economy, state government sector, national economy, public finances, shock influences.

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