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METHODICAL ASPECTS OF THE ANALYSIS OF THE WORLD AND NATIONAL TOURIST INDUSTRY

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N. Dekhtyar

The basic indicators of the world and national tourist industry development are analysed. The features of the methodology of calculation and collection of statistical data that characterise it are described. The differences from the approaches of the specialised international organisations are indicated. The selective estimation of macroeconomic indices of the tourist industry by the countries of the world is presented on the basis of combination of national and world methods. The principles of observations grouping are illustrated, the reasons of unbalanced tourist flows and possible consequences for the economy of a country are given. The review of the main tasks of the government control over foreign trade of services is conducted.

Key words: macroeconomic performance of tourist industry, balancing of tourist flows, government control over foreign trade.

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МЕТОДИЧНІ АСПЕКТИ АНАЛІЗУ ПОКАЗНИКІВ СВІТОВОЇ ТА НАЦІОНАЛЬНОЇ ТУРИСТИЧНОЇ ГАЛУЗІ

УДК 338.486.1.02:005.52(477+100)

Єрмаченко В. Є.
Дехтяр Н. А.

Проаналізовано основні показники розвитку світової та національної туристичної галузі. Виявлено особливості методики розрахунку та збору статистичної інформації, що характеризує її діяльність, та вказано відмінності від практики спеціалізованих міжнародних організацій. Надано вибіркову оцінку макроекономічних показників туристичної галузі за країнами світу на основі поєднання національної та світової методик. Проілюстровано принципи групування досліджуваних одиниць, наведено причини незбалансованості туристичних потоків і можливі наслідки для економіки країни. Проведено огляд головних завдань державного регулювання зовнішньої торгівлі у сфері послуг.

Ключові слова: макроекономічні показники діяльності туристичної галузі, балансування туристичних потоків, державне регулювання зовнішньої торгівлі.

МЕТОДИЧЕСКИЕ АСПЕКТЫ АНАЛИЗА ПОКАЗАТЕЛЕЙ МИРОВОЙ И НАЦИОНАЛЬНОЙ ТУРИСТИЧЕСКОЙ ОТРАСЛИ

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Проанализированы основные показатели развития мировой и национальной туристической отрасли. Выявлены особенности методики расчета и сбора статистической информации, которая характеризует ее деятельность, и указаны отличия от практики специализированных международных организаций. Представлена выборочная оценка макроэкономических показателей туристической отрасли по странам мира на основе объединения национальной и мировой методик. Проиллюстрированы принципы группирования исследуемых единиц, приведены причины несбалансированности туристических потоков и возможные последствия для экономики страны. Проведен обзор главных задач государственного регулирования внешней торговли в сфере услуг.

Ключевые слова: макроэкономические показатели деятельности туристической отрасли, балансирование туристических потоков, государственное регулирование внешней торговли.

The differences in the methodology and principles of gathering and processing of statistical data which are used at the international and state levels can often distort actual position of a country in the world market of tourist services, hidden the existing problems of regulation of tourist industry and veil the possible threats to economic security. Investors can be misled by extraordinary positive or negative responses published in recognisable editions, and governments may choose a wrong strategy in foreign relations. Moreover, information presented in the sources of specialised world organisations, is sometimes more diverse and pervasive than in country's reports, as it can be seen on the example of Ukraine. The topicality of the issue is substantiated by the increasing influence of tourist industry in the world and national markets, raising interest in innovative methods of running business, especially in the sphere of services, and deep interrelation of tourist sector performance with the output of a balance of payments.

The problems of evaluation of tourist industry performance were investigated in the works of Ukrainian and Russian scientists A. Alexandrova, A. Beidyk, V. Kvartalnov, O. Lyubitseva, S. Melnychenko, G. Papiryan, T. Tkachenko, D. Ushakov and others, but the problem of combining the principles of calculations used in the CIS countries and abroad, and methods of including data received from different sources were not clearly described.

The object of the article is the macroeconomic performance of the world and national tourist industry, the subject is the improvement of methodical approaches to the process and procedures of the assessment of the main indicators of tourism sphere. The aim of the article is to estimate the functioning of Ukrainian market of tourist services in accordance with the international representation and to work out the considerable recommendations for the enhancement of negative trends. The tasks are the following: to analyse the main macroeconomic indicators of the world tourism market and to find the position of Ukraine in it; to suggest the reasonable methods of comparing of different indices; to point out those sectors of activity, which cannot be supervised on the basis of predominantly international statistics.

The methodology of counting of tourist flows in Ukraine is based on the three-dimensional model, where the types of tourism (inbound, outbound and domestic) form then broader categories (international, national and tourism within the borders of a country) (fig. 1) [1].

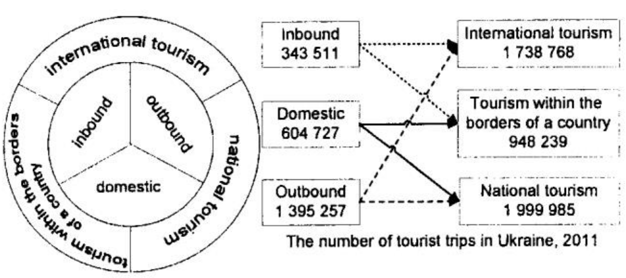

Fig. 1. **The components of the three-dimensional model**

The number of tourists (trips) is rendered by the State Statistics Service; the activity of the industry in money terms is estimated by the authorized tourism administrations in the form of annual and seasonal reports, analytical issues and announcements. The estimation of the national tourism sphere output presented in world databases is more detailed but hard to be matched with the inner concept. The precise analysis of the WTTC methodology clears out, that the same three-dimensional approach is used in evaluation of countries' profiles, only with more or less inclination to domestic or international activity (fig. 2) [2].

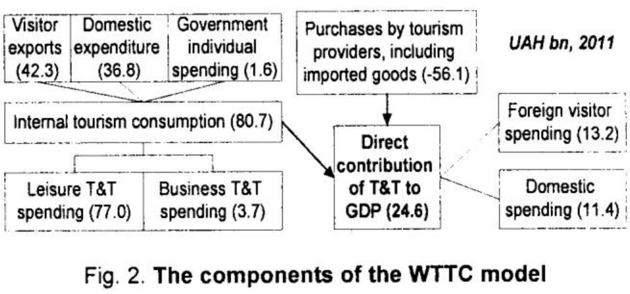

Fig. 2. **The components of the WTTC model**

The expenditure on outbound travel is calculated separately (belongs to the group "Other indicators") and cannot be included in the scheme (made 33.1 billion UAH in 2011 – more than direct contribution of travel and tourism to the GDP). The outcome of tourism economy (including direct, indirect and induced influences) and then – the Total contribution of Travel & Tourism to the GDP, which made 92.1 bn UAH in 2011 – is assessed through the system of intersectoral balances (input-output model). The component structure of it is defined in Ukraine by the Classification of types of economic activities, which had been changed in 2012. But previously and now, there is no aggregate tourist industry at all: the activity of hotels and restaurants belongs to one sector (I – permanent accommodation and catering), and the activity of tour operators, agents and other recreational companies – to another (N – activity in the sphere of administrative and subsidiary services).

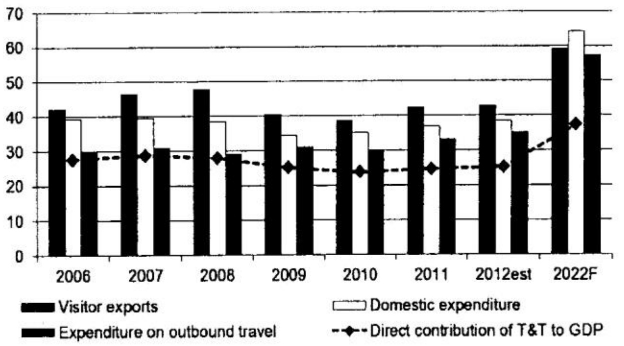

Fig. 3. **The indicators of tourism activity in Ukraine, UAH billion (real 2011 prices)**

Fig. 3 helps to compare the main indicators of tourist industry in Ukraine. According to the primary data, visitor exports exceed expenditure on outbound travel and domestic expenditure, but direct contribution of travel and tourism to the GDP represents the following figures: in 2011 the adjusted income from inbound tourism (foreign visitor spending) made 13.2 bn UAH and domestic spending 11.4 bn UAH (the total GDP is 24.6), when expenditure on outbound travel was estimated in 33.1 bn UAH [2]. So, the pure industry received losses in 33.1 – 24.6 = 8.5 bn UAH, but the net balance of money flows cannot be measured using the same indicators, as the expenses of supply chain (purchases by tourism providers) include both imports and intermediate consumption in a domestic market. The researcher needs to apply to the balance of payments data in order to evaluate the net income of tourist industry.

The expert judgements give unfavourable forecasts for revenues in international tourist market of Ukraine, as more and more operations are transferred to a hidden sector (legal activity which cannot be followed), and personal expenses are constantly increasing but are not calculated. The dilemma for any open economy is to support the free trade regime in the national market and to stop or reduce in time the activities of the actors, which are destructive for the economic security of a state. In Ukraine, households' income outflows for the benefit of other host countries are one of the factors of budget deficit as the money of possible secondary sector circulate in foreign economies.

Fig. 4 describes the correlation between the values of tourist industry contribution to the GDP and the shares of visitor exports in total tourism expenditures. The plot is better described by an exponential model when the share of visitor exports in total expenditures doesn't exceed 70 %, and by a polynomial model when visitor exports exceed 70 % of total tourist expenditures. The data taken from 181 national economies demonstrate that the contribution of international tourism receipts to the total gross income (which contains expenditures of outbound, domestic and foreign visitors) is not a crucial factor influencing the share of T&T Direct Contribution to the GDP for the majority of the countries. The tourist industry impact to the GDP made up to 5 % in 123 countries of 181 under research (or 68 % of observations), from 6 to 10 % – in 38 countries (21 %), from 11 to 20 – in 15 countries (8 %); Seychelles (24.8 %), Anguilla (24.4 %) and Aruba (20.6 % of the total GDP) exceeded the margin of 20%, and only in Maldives (31.3 %) and Macau (43 %) tourist industry generated more than 30 % of the GDP. On the contrary, the distribution of countries by the share of ITR is virtually even, only 7 national economies had the extraordinary income from the export of tourist services – more than 80 % of total tourism expenditures: Macau (94.0 %), Vanuatu (87.7 %); UK Virgin Islands (85.1 %); Fiji (84.3 %): Antigua and Barbuda (83.9 %); Other Oceania (composition of the region according to the WTTC, 83.7 %) and Anguilla (82.1 %) (fig. 5).

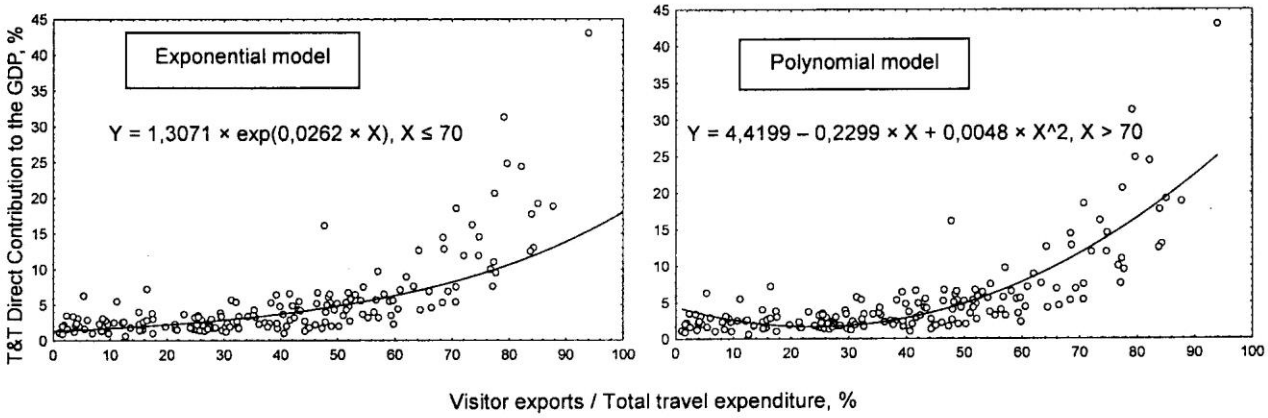

Fig. 4. **The correlation between international tourism receipts and the GDP, generated by tourist industry**

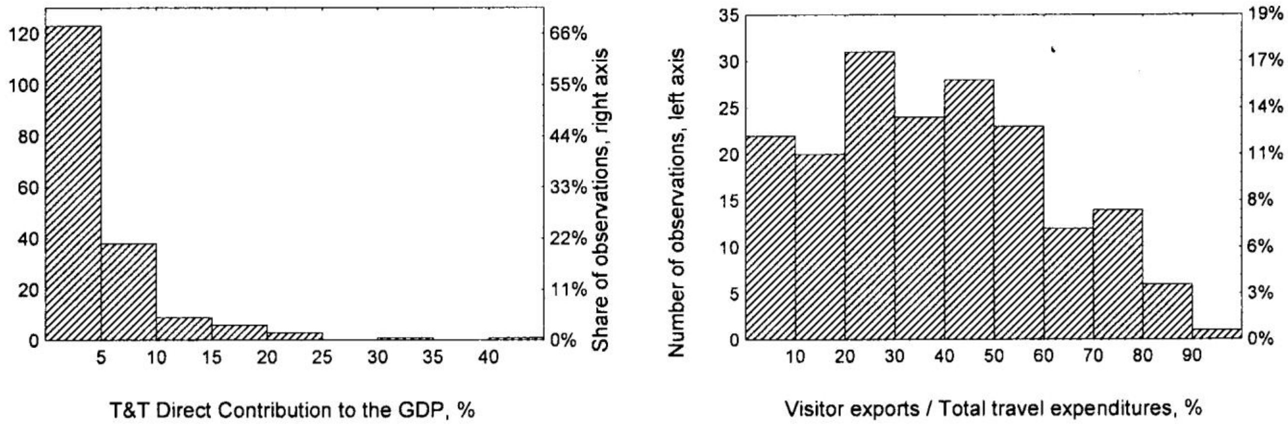

Fig. 5. **Grouping of countries by ITR and the GDP, generated by tourist industry**

On the other hand, the stability of tourism market in a state is supported by the domestic consumption and reasonable ratio between inbound and outbound flows. Fig. 6 represents the distribution of countries by the expenditure on outbound travel (measured as a share in the "national tourism" category) and domestic expenditure (measured as a share of direct T&T contribution to the GDP). The countries can be divided into 4 quadrants (table 1).

Table 1

The groups of countries by tourism flows indicators

Grouping indicators (based on 2011 data)		Expenditure on outbound travel, the share of national tourism, % 0 – 50	Expenditure on outbound travel, the share of national tourism, % 51 – 100	NQ
Domestic expenditure, % share of direct T&T contribution to the GDP	0 – 50	1st quadrant (23)	4th quadrant (70)	93
	51 – 100	2nd quadrant (43)	3rd quadrant (45)	88
Number of countries in quadrants (NQ)		66	115	181

The investigated countries were arranged almost equally by the share of domestic expenditure in direct T&T contribution to the GDP (distribution is close to normal) – markets with the highest relevant capacity are located in Guinea, Papua New Guinea, Bangladesh, Burundi, Gabon, Venezuela, Japan, Brazil, Libya, Democratic Republic of Congo, Sudan, Central African Republic, Myanmar (90 – 100 rate) and Cote d'Ivorie, Pakistan, Kuwait, Nigeria, China, Mexico, Lesotho, Iran, Malawi, Cameroon, Algeria, India, United States, Kiribati, Chile (80 – 90 rate) – of cause, this figures must be compared with the population income, i.e. real consumer demand for travelling. The least developed domestic market was (0 – 10 rate) in Barbados, Antigua and Barbuda, Seychelles, Aruba, Fiji, Cape Verde, UK Virgin Islands, Maldives, Vanuatu, Anguilla, Macau. On the contrary, the share of outbound travel expenditures is displaced in general to the maximum. The highest outbound / domestic spending ratio was in Guadeloupe, Kyrgyzstan, Martinique, US Virgin Islands, Albania, Anguilla, Cyprus, Armenia (outbound expenditures made more than 90 % of national tourism), and the lowest – in Democratic Republic of Congo, Myanmar, Trinidad & Tobago and Algeria (less than 5 %).

Ukraine belongs to the 4th quadrant, as its residents spent 33.1 bn UAH (74.3 % of total residents' tourist expenditure) and the share of domestic expenditure in direct T&T contribution to the GDP made 46.5% (or 36.8 bn UAH).

The official data of tourist flows of Ukraine can be regarded as rather contradictory due to the procedure of gathering the information. In contrast to the fact that international organisations pay more attention to the evaluation of income / losses and money transfers when assessing the functioning of a national economy or a separate industry, the resultant figures which describe the sphere of tourism in Ukraine are predominantly composed of the number of trips (fig. 7) [1]. Moreover, the final table of tourist group, presented by the State Statistical Service, contains the series received from the completely different sources: the value of foreign visitors entering the country and the value of citizens going abroad is processed by the Administration of State Frontier Service of Ukraine (based on the registration forms filled at the state borders), while the number of visitors who were served by travel agencies of Ukraine and excursionists are taken from the databases of the Ministry of Infrastructure (in turn, estimated on the basis of firms' reports – forms TOUR-1 and Tourism-1).

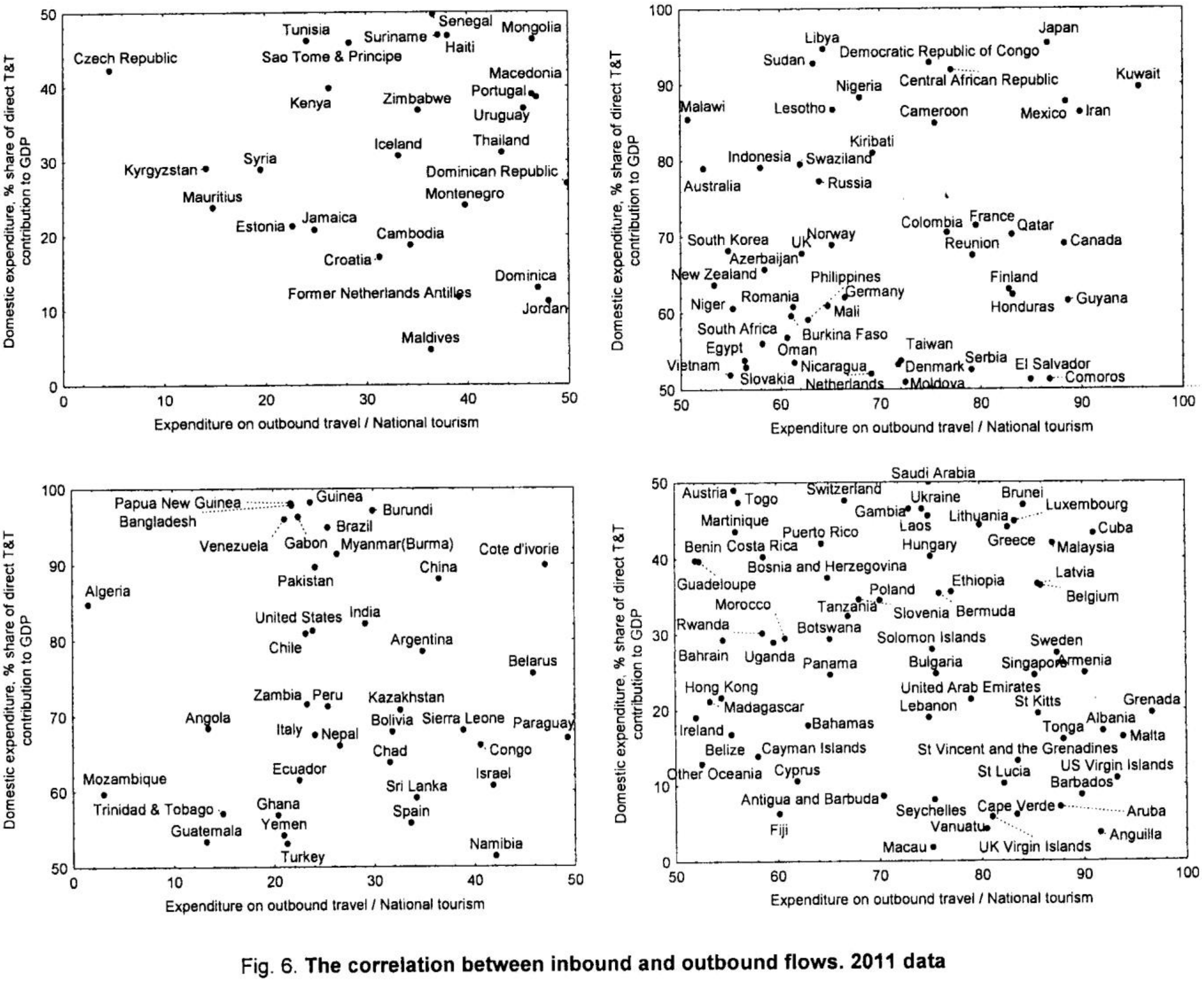

Fig. 6. **The correlation between inbound and outbound flows. 2011 data**

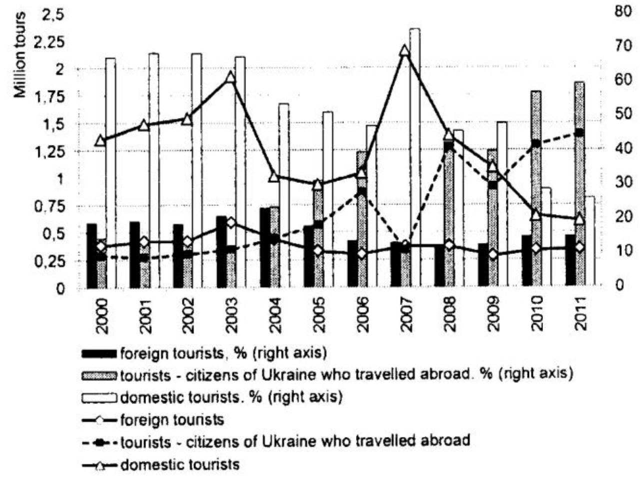

Fig. 7. **Tourist flows of Ukraine, trips**

Note. The official name of the indicators contains the word "tourists", although it indeed counts the number of trips, i.e. border crossings.

Thus the comparison of the general volumes of tourist flows with the number of residents and non-residents crossing the state borders is performed incorrectly, because the summarising indicators and shares are of different origin (fig. 7), but it is the only way to estimate the structure of trips. Fig. 8 shows the negative trend in constant increasing of the quantity of outbound trips with the simultaneous reduction of domestic trips (which is volatile enough) and slight fluctuations of inbound trips at the lowest level. 2004 and 2007 years were rather unstable, becoming the landmarks of the entire inner market: the number of Ukrainian tourists exceeded the number of foreign tourists who visited Ukraine for the first time, and the figures of domestic tourists dropped – from 1.92 to 1.01 million of trips, raising again to 2.15 million in 2007 and decreasing to 604.7 thousand trips in 2011. Notwithstanding the fall in 2007 (up to 372.5 thousand trips), the number of outbound trips reached 1.39 million in 2011. The general negative trend indicates the steep decline in domestic trips and permanent increase in outbound trips with the constant low number of inbound tourists, which may cause the negative net balance of travel industry. The share of tourist trips in the total number of foreign visitors diminished from 5.9 % in 2000 to 1.6% in 2011, while the citizens of Ukraine who purchased travel packages made 7.1 % of the total number of visitors going abroad (in comparison with 2.1 % in 2000) [1].

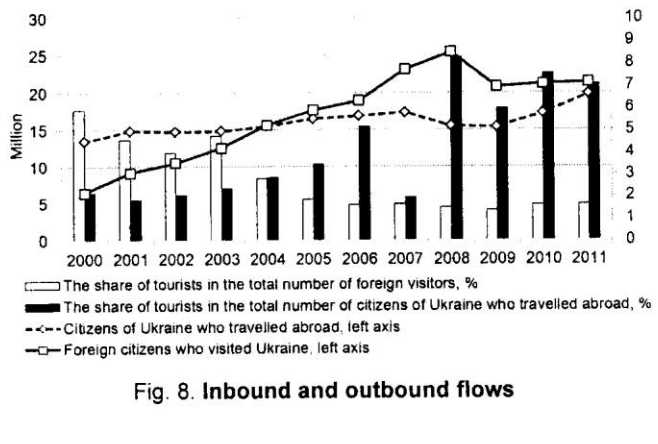

Fig. 8. **Inbound and outbound flows**

These data indicate indirectly that foreigners prefer to use individual accommodation facilities and organise a journey themselves because of the high prices of tourist services. According to the UNWTO statistics, Ukraine took the 14th place by international tourist arrivals (21.4 million) in 2011, but international tourist receipts made only 4.3 USD bn – the country did not get even in Top-30 by the given indicator. The reason is that the essential part of income is hidden – services, rendered by physical entities and small enterprises, are not always registered officially (fig. 9 – 10) [3].

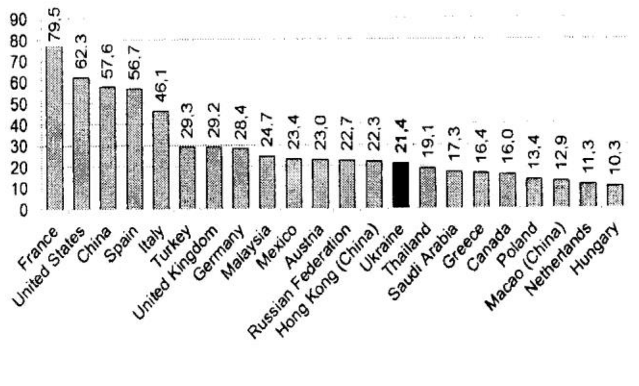

Fig. 9. **International tourist arrivals, 2011 (million)**

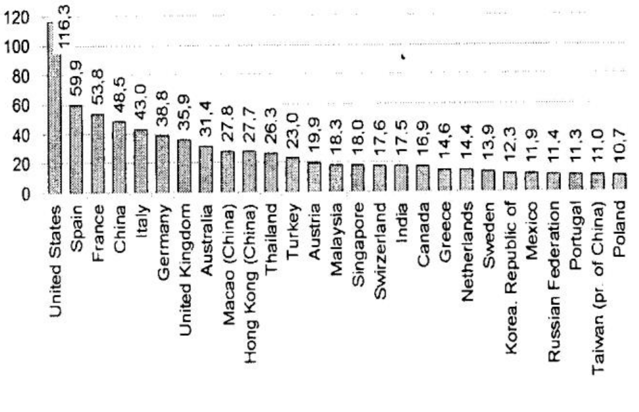

Fig. 10. **International tourism receipts, 2011 (US$ bn)**

In turn, Ukrainian statistics reports of 21.4 million total visitors, and only 1.2 million of them are so-called "organised tourists" – people who bought package services from the host travel companies (this figure corresponds to the volume indicated in final statements). Table 2 represents the structure of tourist flows of Ukraine, and it is obvious at a glance, that inbound and outbound visits are classified in different ways: if inbound flows are divided into seven main groups, outbound ones are divided only into three groups. Of course, it doesn't mean that goals which are not mentioned are insufficient – they are simply added to the others. In general, we can compare the number of organised visits: outbound flows of 1.59 mn exceeded the inbound of 1.2 mn in 2011, but the total number of international visits fixed on the borders showed the opposite trend – citizens of

Ukraine who travelled abroad made 19.77 mn, while foreign citizens who visited Ukraine – 21.4 mn, as it was mentioned above [1]. Pilgrimage or educational trips, for example, cannot be compared on the inbound / outbound basis. Such incomparability in the methodologies of counting, and the approach of the UNWTO to attribute the majority of private visitors to tourists, shows better performance of Ukraine in the world market that it actually is, but hides those negative trends which must be analysed thoroughly in order to avoid jeopardising of the net balance of tourist and connected industries.

Table 2

The structure of inbound and outbound tourist flows of Ukraine, 2011

Foreign citizens who visited Ukraine	Number of visits	Share, %	Citizens of Ukraine who travelled abroad	Number of visits	Share, %
Private visit	19 180 171	89.56			
Organised tourism	1 225 954	5.72	Private visit	17 285 834	87.42
Business trip	644 992	3.01			
Cultural event, sport event, religion, other	224 071	1.05	Organised tourism	1 590 182	8.04
Immigration	64 796	0.30			
Education	59 169	0.28	Business trip	897 127	4.54
Placing in a job	16 143	0.08			
Total	21 415 296	100	Total	19 773 143	100

Nevertheless, Ukrainian market demonstrates the next regular shift in the balance between foreign and domestic international visitors – nearly 2 million foreign tourists visited Ukraine in 2012 during the European football championship, according to the data of the Ministry of Foreign Affairs. Not all of them were officially registered as "organised", but the value of inbound flows will increase by the end of 2012 – thus the host performance of the country will receive a positive response again, while no nonrecurrent events of such scales are predicted in 2013, so reliable forecasts even for the next 3 – 5 years cannot be made basing on current figures.

The problem of counting of individual tourists via organised trips and private money transfers in both sides is not only the problem of Ukraine; any state which has a high turnover in the sphere of services trading, has worked out special detailed measures of its regulation. The huge increase in electronic payment systems operations in the CIS countries has been following the same trends in the developed markets, but the issues of economic security in the sphere of international transactions is not still ordered in Ukraine – but, taking into account the permanent growth in numbers of individual trips, some urgent financial clauses must be considered – as well as the principles of statistical accounting on the borders.

The rapid implementation of information technology simplifies dramatically the search, booking and purchasing of travel services, contributes to the development of products based on individual needs, but not on the most common mass consumer profiles, and also provides access to a single, previously unavailable resources. A tour operator receives a unique opportunity to "superstructure" the basic package with the demands of each individual customer. Indeed, provided instant confirmation of an order and the presence of several dozens of hotel enterprises, institutions of culture and leisure within the intended city or area make individual planning of tours, scheduled site visits, which are interesting to a single tourist easy. On the other hand, there is a peculiar tendency to independence of consumers in countries with a developed tourist infrastructure, including transport. Tourists, especially the adherents of adventure holidays and search of experience, do not prefer to address to agents, i. e. to travel companies, to purchase tickets, hotel reservations and receive information about recreational potential of the country (region) to be visited, as they believe that no one understands and knows them better than they do. Sometimes such "collected" package is cheaper than the proposed by a travel agency. However, price is not always a major factor in resolving the dilemma "to purchase a complex tourist product or try to organize the trip oneself." It should be mentioned again that a similar choice is faced by consumers in the countries with a clear relationship between the different actors of the tourist market and necessary conditions for such independence. For example, even in the presence of an on-line reservation, including the resources of carriers, accommodation and leisure facilities, difficulties that constantly arise when the potential buyer tries to pay for the services, reduce dramatically the desire to act independently. If the airline or the hotel confirms the availability in ten minutes, the customer, respectively, has to confirm his ability to pay within the same time – to transfer an advance or the entire amount of the order, or to provide a reliable guarantee of further charge. In the domestic market because of the absence of technical capacity for instant transfer of funds such minimum guarantee may be entering passport details and other personal information when registering in the system or filling in the form of order – if a customer is not forced to pay, at least it will allow to find him (or include into the "black list" for several consecutive cancellations). If a service provider intends to have the fewest number of cancellations, a buyer searches for the ability to pay in time for a desired service. A paradoxical situation occurs when, for example, an order of ticket takes maximum an hour and redemption procedure requires several hours. Or a hotel bills a universal invoice, accepted for payment in many countries, but the restrictions on such operations are imposed by the national commercial banks. Naturally, an individual consumer is not able to solve the issues of information and financial support of a country foreign trade – in fact, the transfer of funds abroad in order to purchase any goods or services by individuals should be treated as a separate class of foreign operations and, accordingly, have a special procedure of regulation.

The commercial booking systems are not obliged to report intermediary calculations to country's authorities, but in particular cases this is the only way to determine the market share of tourist services in geographical and income breakdown. According to the Ukrainian legislation, only tour operators have the permission to sell services of foreign travel companies and other institutions [4], but individual consumers doesn't have any restrictions in ordering rooms, tickets, excursions etc. from abroad. The reduction of the complexity of international private payments forces the development of unassisted tourism sector and raises the volume of uncontrolled, from the side of a government, foreign economic operations.

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