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

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

**JEL Classification:** L83

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

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

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

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

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

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

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

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

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

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

The European market of tourist services is currently one of the largest segments of the world market, both in terms of tourist arrivals and revenue from international tourism. In 2017, European countries were visited by 670.6 million tourists, which is 8 % more than in
2016, 38% more than in 2010, and 48% more than in 2005 [17]. In the overall structure of international tourist arrivals, the European continent accounted for 51% in 2017, including the EU countries at 41%. In 2017, international tourism brought European countries revenue of $519.2 billion, which is 8% more than in 2016 and 22.8% more than in 2010 [18]. In the total structure of revenue from international tourism, the share of European countries accounted for 39%, including the EU countries at 33%.

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

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

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

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

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

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

In the rating of tourist competitiveness of the countries of the world Ukraine ranks rather low. Thus, in 2007, it ranked 78 (with the index of 3.89 out of 7 possible), in 2008-2009 - 77 (with the indexes of 3.76 and 3.84 respectively), in 2011 - 85 (with the index of 3.83), in 2013 – 76 (with the index of 3.98), in 2017 – 88 (with the index of 3.5) [6]. This state was not represented in the rating of 2015 as the study was not carried out. However, compared with the results of the 2013 study, we lost 12 positions.
If we compare the position of Ukraine with the European countries, this state is beyond all the EU countries and is only ahead of Macedonia, Serbia, Albania, Bosnia and Herzegovina and Moldova. The development of tourism industry in Ukraine today is considerably inferior to the nearest neighboring countries of the European Union: Poland, Hungary, Czech Republic. For recent years, the European and world leaders in the travel and tourism sector have been Spain, France and Germany.

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

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

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

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

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

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

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

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

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

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

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

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

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

Table 3

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

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

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

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

The lack of popularization of Ukrainian tourist recreation in the European market by the state institutions (today Ukrainian tourism is mainly advertised by travel companies and public organizations), low financial support, improper quality of services hinders the development of the tourism industry. That is why the problems of state regulation are extremely important.
Україна зможе збільшити свою частку на ринку туристичних послуг Європейської області за допомогою: покращення і оновлення свого туристичного продукту, його нового позиціонування на ринку;відродження традиційних туристичних маршрутів; розповсюдження інформації про національні традиції, ручні роботи, музеї та виставки; пошук та представління нових туристичних продуктів (видів туризму); застосування комплексу маркетингових стратегій. Треба розширити спосіб реалізації туристичного продукту до нових відкриття, отримання нових переживань. Для створення тривожного попиту на національні туристичні послуги та залучення клієнтів до туристичного індустрії потрібно вивчити потреби та очікування європейського туриста на максимальну міри. Тут варто враховувати не лише попит так званої «взрослого» сегменту туристичного ринку, але і молодих туристів, народжених у кінці 21 століття.

Аналіз, проведений у цьому випадку, дає змогу визначити шляхи покращення державної політики розвитку туризму в ході забезпечення Європейської інтеграційної активності України, серед яких важливе місце належить: створення атрактивної туристичної іміджкої образу цієї країни та її регіонів; покращення законодавчих принципів регулювання туризму; здійснення мір і інструментів, які стимулюють туризм і приваблюють ЕУ інвестиції до найвідвідуваних місць; покращення уваги до іноземних туристів; розповсюдження реклами туристичних місць України за кордон; вирішення проблем політики співпраці з іноземними туристичними компаніями; збільшення інвестицій на ринку туристичної продукції до Європейського ринку; розповсюдження інформації через онлайн комунікації; проведення відкритих молодіжних форумів для пошуку інших ідей для покращення туризму; покращення екологічної ситуації, тощо.

Розв'язання завдань по покращенню конкурентоспроможності країни на ринку туристичних послуг вимагає згуртованої та тісної спільної дії між державними виконавцями, представниками бізнесу та суспільства. Держава та підприємства повинні: виділити форми та методи стимулювання розвитку підприємництва в туристичній індустрії; створити ефективну модель політики інвестицій в індустрію; впровадити ефективні механізми фінансово-економічного регулювання розвитку туризму. Підсумок одного з напрямків приваблення капіталу є створення економічних та податкових ініціатив та вигід, що являють собою достатньо ефективна засоба реніверіації внутрішнього і зовнішнього капіталовкладень у туризм.

На жаль, слід зазначити, що створення іміджу України як країни, яка сприятлива для туризму, є однією з відповідей для держави, оскільки приватні підприємства не можуть вести нерентну кампанію рісту попиту серед туристів країни, які використовують та продовжують тільки власні продукти.

Для приваблення України як туристичного навколосвітнього ринку, і приваблення більшості європейських туристів, включаючи: участі в найбільших європейських туристичних виставках з ексклюзивним виставочним стендом для представлення туристичного продукту та включння державних виконавців України; виготовлення нерентних рекламних і інформаційних матеріалів і інших продуктів для розповсюдження на найбільших європейських туристичних виставках і через українські зарубіжні представництва; втручання в домашніх та іноземних фахівців у туристичній індустрії в створення програм розвитку туризму з метою порушення найкращого відомого опанування; розповсюдження інформації про Україну як атрактивний туристичний країна в Інтернет; інформаційну підтримку різних подій, що відбуваються в Україні; організацію інформаційних туристичних відпочинку для Європейської та національної масових медіа; проведення міжнародних конференцій, симпозіумів, конгресів та інших подій, присвячених туризму привабливості України. Головні шляхи формування конкурентоспроможного обвання України на ринку туристичних послуг відображено на рис. 1.
The main ways of forming competitive advantages of Ukraine in the European market of tourist services

Fig. 1. Ways to increase Ukraine's competitiveness in the European market for tourist services
Source: systematized by authors based on [1; 2; 7; 8; 11].

Conclusions. The assessment of the competitiveness of Ukraine in the European market of tourist services (the Travel and Tourism Competitiveness Index, the Registered Competitive Advantages ratio and the Ratio of Relative Foreign Trade Advantage of the tourism industry) suggests that, despite the significant tourist potential, Ukraine today loses to European countries by many indicators of the competitiveness of tourist services and cannot compete with them. This is due to the fact that this state does not pay enough attention to this sector, does not rationally use its competitive advantages related to geopolitical position, existence of natural medical, historical and cultural resources that can attract foreign tourists.
Ukraine is virtually non-competitive, primarily due to the lack of development of tourism and service infrastructure; inefficiency of state policy; absence of the formed attractive tourist image of the country.
Increasing the competitiveness of tourism sector is a key task of the economy of modern Ukraine. Achieving a high level of development of tourism and service infrastructure is possible only if sufficient investment is made into the most attractive tourist destinations of the country. It is important to direct efforts to create a positive image of Ukraine abroad as a country capable of providing tourists not only with the availability of cultural and natural objects for observance, but also with security, comfortable living and travelling conditions, reasonable pricing policy, and high standards of hospitality. At the same time, it is necessary to constantly work to improve own national tourist product, turning it into a competitive one, and promoting this product to the European and world markets of tourist services.

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