

FORMATION OF THE MODERN SUSTAINABLE SECTOR OF TOURISM AND RECREATION IN UKRAINE

Introduction. During past decades traveling, tourism and recreation, as well as all supporting this sector ecosystem have become significant drivers of global economic growth, contributing over 10% to GDP and accounting for 1 in 10 jobs on the planet [1, p. xi]. According to World Tourism Organization investigation “Tourism Towards 2030”, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030. In absolute numbers, international tourist arrivals will increase by some 43 million a year, compared with an average increase of 28 million a year during the period 1995 to 2010. At the projected rate of growth, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020, and 1.8 billion by the year 2030 [2, p. 14].

As one of the fastest growing segments of economic activity in many countries of the world, the sector is increasingly recognized as a vital contributor to job and wealth creation, poverty alleviation and preservation of cultural heritage [3, p. 4]. It is most commonly mentioned in relation to United Nation’s Sustainable Development Goals (SDGs), specifically, SDG 8 (Decent Work and Economic Growth), SDG 12 (Responsible Consumption and Production), and SDG 17 (Partnerships for the Goals), as having the strongest link with tourism [4, p. 6].

A thoroughly designed and well-managed tourism and recreation sector (TRS) can also help protect the environment and preserve natural resources upon which it depends, empower host communities, generate trade opportunities, and reinforce peace and intercultural understanding between nations [4, p. 4; 5, p. 15; 6, p. 2]. Nevertheless, a modern TRS is facing with current challenges and some impediments to further growth. Many popular destinations are encountering with severe throughput and environmental issues due to tourists overcrowding [6, p. 2; 7, p. 444; 8, p. 8-9]. This is leading to inhabitants’ protest movement and measures of local authorities aimed to restrict access to these destinations (see [8]). In addition, major current challenges for the TRS sector are: safety and security concerns as well as the temptation to build new barriers to travel; the technological revolution and the need for the digitization of services; and charting a course toward sustainable development [1, pp. 61, 67; 5, p.15].

In the East European countries, a TRS used to be one of the key sectors, which made significant contribu-

tions to restructuring of the post-communist economies [10, p. 25-26; 11, p. 182], but not in all cases. In Ukraine, the sector is still underdeveloped as jobs creator, investment attractor and innovation promoter [12; p. 269-270]. This is why **the purpose** of the paper is to analyse current situation and trends of digitising in the global TRS and propose policy-making agendas to shape and direct future actions for develop the sustainable tourism and recreation sector in Ukraine and its regions.

Methodology and Research Approach. Initially, in order to build up a solid and tested framework for the proposal part, the concept of sustainable tourism is explored through a literature review of current research of leading scholars on this topic. Then, the dynamics of the global sector of tourism and recreation (TRS) development and trends of its digitising are investigated based on a study of available empirical data and analytical reports. Analysis of the situation with the TRS in Ukraine, existing problems made possible to find ways to overcome them and ensure sustainable development of the sector, taking into account the experience of the European Union countries. Conclusions are summarising the propositions for elaborating and implementing policy measures on regional and local levels aimed on the sustainable tourism and recreation sector development. In doing that, a number of general and special methods were used, such as: theoretical generalization, abstract logic; synthesis, comparative analysis.

Revising the recent literature on sustainable tourism. Since the mid-1990s, publications about sustainability of the tourism sector have been increasing significantly [13, p.1]. Naturally, the sustainable tourism definition has been subject to a wide range of interpretation. The result has been a tremendously varied of sustainability definitions in the context of tourism, just as the term has met with similar varying interpretations in other contexts. World Tourism Organization (UNWTO) after several iterations of the definition has made the choice and defined sustainable tourism as “...tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Sustainable tourism should thus make optimal use of environmental resources, respect host communities and ensure viable, long-term economic operations, providing benefits that are distributed fairly among all stakeholders” [14, p. 12].

During the period from mid-1990s up to first decade of XXI century, many researchers in economic, social and environmental issues of tourism, with a few exceptions, have been reluctant to express a critical view about application of sustainable development conception for tourism. Apparently, this is because the concept was a particularly attractive to scholars who had concerns about the anthropogenic pressure on the nature, as well as negative social consequences of the TRS deployment, and because many of the principles of sustainable development are in line with many of the basic principles of scarce resources saving and environmental management [15, p.8]. Nevertheless, some researchers revealed significant differences between the concepts of sustainable tourism and sustainable development, suggesting that the principles and objectives of sustainable development in global context cannot be transposed onto the specific context of tourism [16, p. 155]. In particular, it concerns the question how local TRS and economies can thrive, and unique socio-cultural and environmental resources survive, in a globalized environment [17, p. 370].

Richard Sharpley suggested, "...the specific focus on sustainable tourism, the dominant tourism development paradigm of the 1990s, can also be seen as barrier to development; ...sustainable tourism development has evolved in into a perspective and restrictive set of guidelines for tourism development that, whilst offering environmentally appropriate, commercially pragmatic and ethically sound principles for optimising tourism's development role, draws attention away from the potential benefits of other forms of tourism and, indeed, other development agents" [18, p. 7]. Thus, much of the work on sustainable tourism, to date, has been concentrated on understanding and managing the impacts of tourism on the physical environment as well as on economic and social outcomes. A little attention is paid to the cultural heritage, which forms the basis of the so-called Indigenous tourism. The cultural heritage is a much more difficult area to assess and manage, with intangible heritage being especially difficult [19, p. 1076].

Goals of sustainable tourism used to be seen as adaptable according to the circumstances of different contexts and changing circumstances over time. It was also increasingly regarded as relevant for all forms of tourism, as well as for different scale of a concrete TRS. Recently, it is more likely that researchers of the sector are assuming a broader role in understanding of tourism sustainability not only spatial patterns and human – environment interactions but also behavioural patterns, socio-economic impacts, sense of place and place-bound identities, globalization, and management. Accordingly, sustainable tourism is often now seen as a "normative orientation that seeks to re-direct societal systems and

behaviour on a broad and integrated path toward sustainable development" [13, p. 1].

Some researchers now suggest that sustainable tourism entails making trade-offs between differing desirable goals, rather than suggesting that it involves a balance among these goals. There is growing acceptance that there will be differing interpretations of what it entails, the scale of reforms needed to give it force, and the extent to which it is being applied in practice. Because of these differing views, many consider that the idea of sustainable tourism serves as a topic for dialogue that take place in conflict situation and negotiation among a range of actors [13, p. 2]. Although further discussion on the meaning of the concept is important, a great deal more attention must be paid to the problem of how to implement the concept in operational activity and make it applicable in appropriate situations to tourism. Related to this is the issue of whether the concept is the same when applied to the human and social world as it is in the context of the environmental sphere, and whether sustainability is achievable within the same parameters in each situation [15, p. 9].

There are more radical proposals, for instance, C. Michael Hall proposed to re-conceptualize sustainable tourism from an ecological economics perspective and put forward the concept of steady-state tourism. From this approach, sustainable tourism development is understood as tourism development without growth in throughput of matter and energy beyond regenerative and absorptive capacities. Steady-state tourism is, therefore, a tourism system that encourages qualitative development but not aggregate quantitative growth to the detriment of natural capital [20, p. 142-143].

The process of commodification in tourism have been analysed from the political-economic point of view by B. Büscher and R. Fletcher. They theorized "...how tourism destinations become capital, understood as "value in motion", and how this process not only provokes various forms of material violence but can be a form of structural violence" [21, p. 653]. Authors concluded that tourism has to be part of a broader degrowth movement; this means that tourism should become part of what called "bioregional economies", that about longer term connection and dedication to specific places, peoples and their local and extra-local socio-economic, ecological and political struggles. Moreover, they believe that tourism should move radically from a private and privatizing activity to one founded in and contributing to the common [21, p. 664].

Recently, there is evidence that discourse of degrowth is increasing in the literature of sustainable tourism. It is significant that the Journal of Sustainable Tourism announced the submissions for a special issue on tourism and degrowth.¹ Obviously, tourism is one of

¹ See: http://explore.tandfonline.com/cfp/pgas/rsus-si-degrowth-4q2017?utm_source=CPB&utm_medium=cms&utm_campaign=JMK03022.

the world's largest industries and hence a main form of economic expansion. Moreover, it is predicted to grow dramatically in the future as the basis of much of the future development aspirations of many lower-income societies. To seriously pursue degrowth at both global and as well as most national levels, therefore, would likely require a drastic transformation of the model of tourism and recreation industry, its structure and the nature of the interaction among constituent elements of the sector [7, p. 445].

Howbeit, we should agree that during current transforming of global economy as whole and TRC as its part, in order to retain research on sustainable tourism to a high scientific level, a systems perspective and an interdisciplinary approach are indispensable [22, p. 459]. The necessity for further research and possible revision of the sustainable tourism paradigm is associated with the fact that tourism itself is transformed and resides in a state of transition now [23, p. 1-2; 24, p.1]. Primarily, a significant impact on the sector, as well as on other economic sectors, is provided by technological changes, in particular, the rapid development of the digital economy [25, p. 77; 26, p. 164]. A prominent area of tourism transforming is geospatial technology. Platforms such as Google Earth, Wikitravel, TripAdvisor and Wikimapia enable and encourage travellers to provide their own opinions, ratings, and practical information for other travellers. As well, social media is now targeted by destinations and individual service providers as a means of disseminating information and undertaking promotional campaigns [27, p. 166]. The process of digitization of the economy is leading to further globalization, increasing mobility, blurring boundaries among economic sectors and to "softening" of physical borders between countries, that are provoking new forms of cross-border tourism [28, p. 1-2; 29, p. 1] and business tourism [30, p. 107]. Also changing in the TRS is occurring due to advances in sustainability-related technologies, as well as safety and security concerns [31; 32].

The issues of sustainability of tourism and recreation sector in national and regional scales are of certain interest of Ukrainian academic circles. Thus, T. Tkachenko and Iu. Zabaldina have completed the analysis of situation in the Ukrainian TRS since the political and economic crisis in 2013-2014. They concluded that in order to bring the sector out of a difficult situation and direct it to sustainable development, an appropriate phased strategy based on a public-private partnership should be developed [33, p. 226-227]. V. Lipchuk and I. Machikha suggested that one of the major directions of revival of the Ukrainian TRS and ensuring its sustainable development is the implementation of the systemic revitalization of the obsolete tourist facilities [34, p. 95].

Some authors stressed on the necessity to elaborating and implementing a well-defined system of state regulation of the national TRS aimed at the sustainable development of tourist destinations with the proper in-

stitutional support [35-38]. I. Antonenko and I. Mel'nyk [39] as well as L. Matviychuk and T. Luzhanskaya [40] suppose that environmental norms should be integrated into the economic sphere of tourism activity, which means that it is necessary to introduce such economic levers that would allow turn tourism into a friendly sector for the environment.

O. Kondratyuk proposed mechanism of ecological and economic appraisal of TRS functioning for targeting state governance on sustainability goals [41], whereas A. Hahlyuk and A. Lukyanov point to the need for ecologization of tourism activity as well as fostering of ecologically safe technologies introduction in tourism, and elaborating of a national program for the development of ecological tourism, creating of eco-networks, and also increasing the share of environmental taxes in the consolidated budget of Ukraine up to 6-9% [42, p. 42-43].

Some publications are devoted to investigating of regional features of tourism development and creating of tourism and recreation clusters [43-47] and possibilities of using European countries experience concerned support of a national TRS development [48-51].

One of the important areas of research on sustainable development of the tourism and recreation sector in Ukraine, which, in our opinion, is not adequately covered in the literature, is innovation activity in the sector and especially fostering of its digitising (the latter has been devoted only to a small number of works, see [52-54]).

Situation in the global TRS and trends of its digitising. In recent years, the tourism and recreation sector and all supporting this sector ecosystem has contributed totally around seven trillion U.S. dollars to the global economy annually, nearing eight trillion in 2016. A highly profitable and valuable sector to the global economy, the TRS makes a direct economic impact of more than two trillion U.S. dollars each year (see Fig. 1).

Over the past seven years, the sector has demonstrated a decline in the share of its total contribution to the global GDP from 9.9% in 2010 to 8.9% in 2012, but then gradually increased its share and in 2016 exceeded the 2010 level (see Fig. 2).

Year 2016 marked the seventh consecutive year of sustained growth in international tourism, with arrivals (number of overnight visitors) increased by 4% or more every year following the global economic crisis of 2009. Slightly more than half of all overnight visitors travelled to their destination by air (55%), while the remainder travelled by surface transport (45%) – whether by road (39%), rail (2%) or water (4%). The trend over time has been for air transport to grow at a somewhat faster pace than surface transport, thus the share of air transport is gradually increasing. In 2016, the purpose of visit for over than half (53%) of all international tourist arrivals was travel for holidays, recreation and other forms of leisure, 27% of international tourist arrivals travelled for

reasons such as visiting friends and relatives, religious beliefs and pilgrimages, health treatment, etc., some 13% of all international tourists reported travelling for

business and professional purposes, and the remaining 7% of arrivals was for other not specified reasons [2, p. 4].

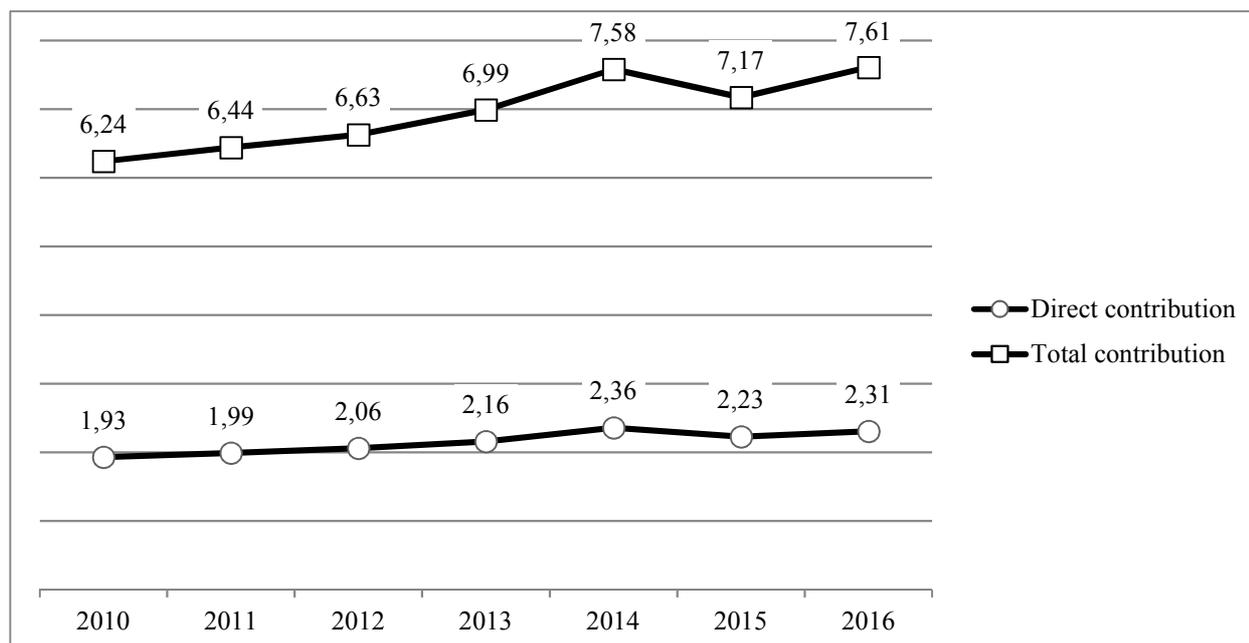


Fig. 1. Direct and total contribution of TRS to the global economy, trillion US dollars

Source: The Statistics Portal. Available at: <https://www.statista.com/statistics/233223/travel-and-tourism--total-economic-contribution-worldwide/>.

Note: The direct contribution of the TRS includes the related commodities, accommodation, transportation, entertainment and attractions of these industries: accommodation services, food & beverage with related services, retail trade, transportation services and cultural, sports & recreational services. The figures for total impact also include indirect and induced contributions.

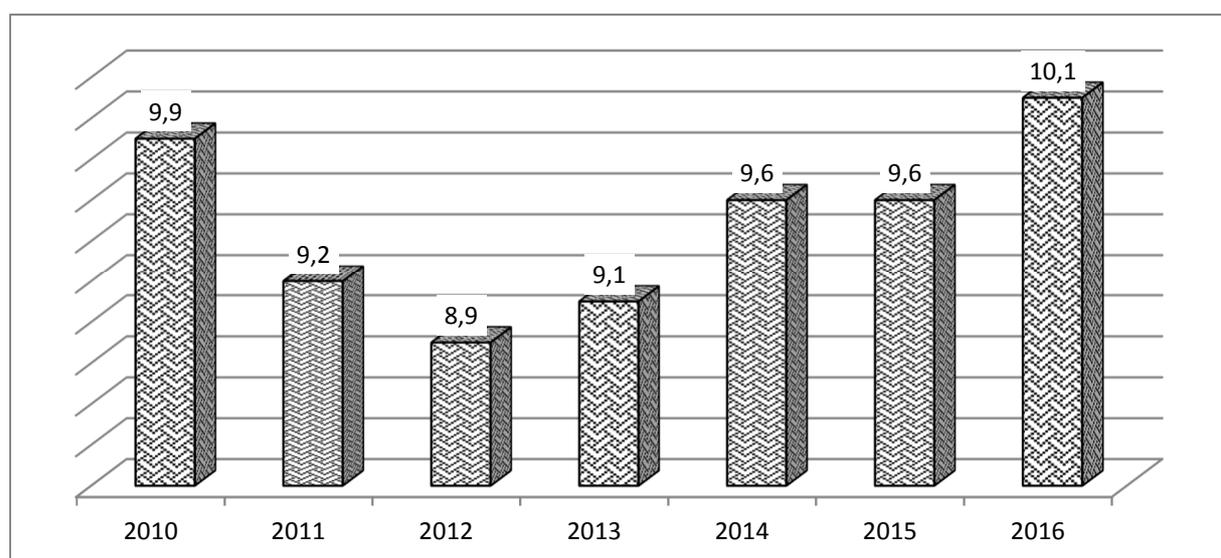


Fig. 2. Share of the TRS total contribution in global GDP, %

Source: The Statistics Portal. Available at: <https://www.statista.com/statistics/233223/travel-and-tourism--total-economic-contribution-worldwide/>; World Bank's Data Catalog. Available at: <https://siteresources.worldbank.org/DATASTATISTICS/Resources/GDP.pdf>.

The indicators characterizing the dynamics of arrivals by geographical markets of outbound tourism for 2016 in comparison with 2010, as well as the forecast of these indicators until 2030 are presented in Table 1.

According to the table, during 2010 - 2016 Asia-Pacific and American countries were the most growing outbound tourism markets, while the traditional European destinations, occupying half of the market, showed more modest growth (3,6% less than global average growth rates), but it should be noted that these destinations are on the top of growing base numbers. Negative

dynamics of growth in the Middle East region is connected with the military confrontation in Syria and on the borders with neighbouring countries, as well as the high level of threat of terrorist attacks in the region. While African countries have shown modest growth rate since 2010, international tourist arrivals in the continent increased by an estimated 8% in 2016 according to the comparatively limited data available to date, representing a strong rebound after a weaker performance in 2014 and 2015 in the wake of various health, geopolitical and economic challenges [2, p. 7].

Table 1

Outbound tourism by geographical markets, 2016 and projections for 2030

Region	2016			2030, projections		
	Number of tourists (millions)	Change,% (to 2010)	Market share (%)	Number of tourists (millions)	Change,% (to 2016)	Market share (%)
Global	1235	29,6	100	1809	46,5	100
Africa	57,8	14,7	4,7	90	55,7	5,0
Americas	199,3	32,8	16,1	265	33,0	14,7
Asia-Pacific	308,4	48,2	25,0	541	75,4	29,9
Europe	616,2	26,0	49,9	832	35,0	46,0
Middle East	55,6	-3,2	4,3	81	45,7	4,5

Source: UNWTO Tourism Highlights: 2017 [2, p. 4]; Calculation of author based on: World Economic Forum. Digital Borders: Enabling a secure, seamless and personalized journey [55, p. 5].

As expected, bulk of the arrivals growth will occur outside the traditional North American and European niches of the international tourism market by 2030. These regions will demonstrate a weak growth yet, but their shares in the global international tourism market will decrease. Most of the arrivals will come from Pacific Asia, Africa and the Middle East, which benefit from further economic growth and job opportunities, but they will also feel serious pressure on the environment. Research undertaken by the World Tourism Organization in 2016 [2] focusing on the forecasted fastest growing destinations is consistent with the expected growth of developing nations and emerging markets. In effect, not only will emerging markets become larger source markets due to increase in per capita income in these countries but also they will become more attractive destinations. International tourist arrivals in destinations of emerging the economies (Asia, Latin America, Central and Eastern Europe, Eastern Mediterranean Europe, the Middle East and Africa) will grow at double the rate (+4.4% a year) of that in advanced economy destinations (+2.2% a year), as expected by UNWTO experts.

As a result, the number of arrivals in emerging economies is expected to exceed those in advanced economies before 2020. By 2030, 57% of international arrivals will be in emerging economy destinations (versus 30% in 1980) and 43% in advanced economy destinations (versus 70% in 1980) [2, p. 14].

In light of the industry's growth forecasts and the new global context, the global community must pursue its commitment to securely and seamlessly enable the movement of legitimate travellers. To accommodate for the expected 2 billion international trips in the next 13 years, national authorities and global institutions need to fundamentally rethink the policy framework for sustainable tourism development and innovate the arrangement and implementation of future travels. The innovations and technological advancements of the past decades, especially in ICT have led to unprecedented connectivity and raised the expectations of travellers who wish to have a seamless, secure, efficient and personalized journey. In order to achieve a comfort travel with minimal bureaucratic barriers it is urgent to digitise all procedures on such three stages of a journey as:

booking and confirmation of the eligibility, departure and security, flight and arrival [55, p. 8].

However, digitalisation is needed not only for travelling itself. As tourists become more independent, connected and conscious of sustainability issues, the tourist destinations are requiring to embrace, and adapt to, their changing profile and priorities, and become better at promoting so-called smart destinations with appropriate marketing. New technologies moreover offer challenges and opportunities for all supply chains or clusters in a TRS. Digital transformation for the TRS is characterised by a fusion of advanced technologies and the integration of physical and digital systems, the predominance of innovative business models and new processes, and the creation of smart local products and services. Currently, even in developed countries tourism and recreation businesses are not taking full advantage of digital advanced technologies or the innovative business models offered by the collaborative economy. The state of the digitisation of the sector varies across destinations, particularly between high-tech services and more traditional areas of tourism and recreation, and also between countries and regions advanced in digitisation and lagged ones. There are also large disparities between large touristic companies and local SMEs engaged in the sector [56].

In recognition of the industry's significant role in driving pan-European job creation and economic growth, the European Commission has introduced various initiatives, particularly aimed at promoting sustainability, accessibility, culture, and at boosting digitising of the TRS¹. The Virtual Tourism Observatory, the Digital Tourism Network, and the tourism managing tool, European Tourism Indicators System (ETIS), have been established to modernise European tourism and improve connectivity and competitiveness.

In several European tourist destinations local authorities in partnership with business are undertaking strategic efforts to digitization a local TRS and boosting investments into a pioneering initiative called "Smart Destinations". Its aim is to sustain a digital growth of this sector while enhancing the residents well-being. This initiative features cross-cutting issues such as introducing the innovative technologies, planning the development of sustainable infrastructures, developing of resilience strategies for localities which suffering large seasonal population flows, and aiming to pave the way towards circular economy. A key point which was acknowledged throughout the day was the importance of new technologies to provide valuable data by which more informed decision-making process can be set up and assessed, in contrast to the past decades. More generally the phenomenon of digitization and the deployment of Cyber-Physical Systems (CPS) technologies and the Internet of Things (IoT) is expected to increase

substantially over the next decades, holding great potential for novel applications, innovative products and services as well as new business models. CPS and IoT technologies increase the ability to predict behaviour and can thus be used to reengineer business processes, e.g. designing them more sustainable, using available resources more efficiently and effectively – in line with the concept of circular economy. "The Road2CPS Consortium" is an alliance of representatives of municipalities, regional authorities and scholars from Spain, Portugal, Italy, Hungary, and Austria, with the aim to develop the framework of smart destinations and sustainable tourism facilitated by digitization efforts. It is further deals with specific challenges faced by cities and regions whose economic and labour market profiles are marked by tourism and the corresponding opportunities offered by CPS and IoT technologies. CPS experts as well as end-users and businesses ranging from start-ups to large enterprises are invited to participate and contribute to implement disruptive innovations and to assess their impact on the local business ecosystems [57].

Competition position of the Ukrainian TRS and directions of its further development. Direct revenues of the Ukrainian TRS in 2016 amounted up to 1.4 US dollars or 1.5% of GDP, while the total contribution from the sector and connected industries amounted 5,6% of GDP (5.0 billion US dollars). The growth of the sector direct revenues is projected to increase by 4.2% in 2017, and an average growth of 2.8% annually for 2017-2027 (up to 1.9 billion US dollars or to 1,7% of GDP in 2027). The growth of the total revenues of TRS's ecosystem is projected to increase by 3.4% in 2017 (2.9% annually by 2027) and up to 7.0 billion US dollars or to 6.2% of GDP in 2027 [12, p. 268-269].

Protracted political and economic crisis since the end of 2013, annexation of the Crimea, military confrontation in the East of Ukraine has been leading to a significant decreasing of the TRS activity and significant loss of tourism potential of the country. Tourism sector of all Ukrainian destinations lost the Russian market which share was near 60% of tourist flow [33, p. 222]. According to estimation of experts from the Association of Tourism Business Leaders, the overall size of Ukrainian tourism losses from the beginning of 2014 is equal approximately 70-80% [58, p. 41].

Below are the data for 2016 for Ukraine and its six neighbouring countries, which show the share of these countries in Europe by area, and in parentheses – on revenues from international tourism².

Ukraine – 5,9% (0,2%); Poland – 3,1% (2,5%);
Romania – 2,3% (0,4%); Belarus – 2,0% (0,2%);
Hungary – 0,9% (1,3%); Slovakia – 0,5%
(0,6%); Moldova – 0,3 % (0,1%)

¹ For details see: https://ec.europa.eu/growth/sectors/tourism/support-business/digital_en.

² Source of the calculations: https://en.wikipedia.org/wiki/List_of_European_countries_by_area and [2, p. 8].

Of course, the Ukraine's performance was adversely affected by the annexation of the Crimea and the fighting in the Donbass. However, even if you adjust the data for 2016 by adding the losses noted above (70-80%), you will still see how underused the tourist potential of Ukraine in comparison, for example, with Poland, Hungary and even Belarus. In order to assess the competitive position of the Ukrainian TRS, we compiled the table on the basis of data from The Travel & Tourism Competitiveness Report 2017 of the World Economic Forum [1], where The Travel & Tourism Competitive-

ness Indexes for 136 countries are represented (see Table 2).

In the Table 2 data on the components of this index, calculated for Ukraine, are presented in comparison with the corresponding data of the neighbouring countries, with the exception of Belarus, since it is not represented in the report. Based on the analysis of the indicators of this table, it is possible to identify the directions on which it is necessary to channel efforts aimed at a significant strengthening of the tourism and recreation sector in Ukraine.

Table 2

Travel & Tourism Competitiveness Index, 2017 by Ukraine and neighbouring countries, score*

Key components of the index	Ukraine	Hungary	Moldova	Poland	Romania	Slovakia
Business environment	3,7	4,2	3,8	4,5	4,4	4,0
Safety and security	3,5	5,7	5,4	5,7	5,8	5,6
Health and hygiene	6,6	6,6	6,1	6,2	6,1	6,5
Human resources and labour market	4,9	4,7	4,3	4,9	4,4	4,7
ICT readiness	4,2	4,9	4,3	5,1	4,7	5,4
Prioritization of Travel & Tourism	4,3	4,9	3,4	4,1	3,8	4,1
International Openness	2,9	4,2	2,1	4,1	3,9	3,9
Price competitiveness	5,2	4,7	5,4	5,5	4,7	5,0
Environmental sustainability	3,9	4,7	4,1	4,6	4,4	4,8
Air transport infrastructure	2,4	3,0	2,0	2,8	2,4	1,7
Ground and port infrastructure	3,0	4,4	2,5	4,3	2,8	4,2
Tourist service infrastructure	4,0	4,4	2,8	4,2	4,4	4,3
Natural resources	2,3	2,6	1,6	3,0	3,0	3,4
Cultural resources and business travel	2,1	2,3	1,2	2,8	2,3	1,5
<i>Total score / Rank among 136 countries</i>	3,5 / 88	4,1 / 49	3,1 / 117	4,1 / 46	3,8 / 68	3,9 / 59

* Scores are on a 1-to-7 where 7 is the best score. For detailed definitions, sources, and periods, consult the interactive Country/Economy Profiles and Rankings at: <http://wef.ch/ttcr>

Strengthening and effective usage of potential for tourism and recreation is a significant component of development not only of the whole country but also of a specific region and local destination, as the availability of significant resources in this area and the return on their use make it possible to increase employment and income of the population and to receive significant revenues to the budgets of all levels. Taking in account the current process of power decentralization in Ukraine it is appropriate to shift the centre of gravity in efforts to ensure the development of a sustainable sector of tourism and recreation in the country towards regional and local levels. The recommendations of the Union of Economists of Ukraine [12] and a number of scientific publications suggest effective measures to remove the Ukrainian TRS from the crisis state (see, for example [33 – 40; 43; 46 – 50]). At the same time, it is expedient to add some suggestions on the development of the tou-

rist and recreational sector in Ukraine, taking into account the best experience of the European Union member states.

1. *Improve management and coordination of the development, promotion and implementation of tourism products at the regional level.* It is advisable to establish regional centres that have the competence for tourism development coordinating and implementing activities for the formation of appropriate infrastructure and marketing of the destinations and tourist products of the region as well as representing their interests at various central government agencies and abroad. This centres with a NGO status will join all stakeholders involved in (or affecting on) the regional value chains in the tourist and recreational sector (including: municipalities and regional governments, national parks management agencies, travel agencies, hotel business representatives, chambers of commerce, local food producers networks,

and educational institutions etc). The centres have to be actively involved in the marketing of local destinations and unique tourism products offered by this region for both external and internal tourists. With regard to the external tourists attracting, it is necessary to significantly expand the geographical horizons of marketing, to actively promote tourism products to markets and countries in which a significant growth of the population incomes is projected, for example, on some Asian and African countries where Ukrainian exported commodities and services are represented insufficiently [59]. It is important that all marketing activities of the centres are based on sustainability principles in order to use marketing skills and techniques for environmentally and socially oriented purpose, by understanding market needs, designing more sustainable products and identifying more persuasive methods of communication to bring behavioural change [60, p. 869].

2. Season expansion for under-utilized regional TRS assets. The essence of this proposal is the organization of off-season cultural, cognitive and sporting events to extend the tourist season (rehabilitation tourism can also be included in this area of activation of the sector). The implementation of this proposal requires the participation of all stakeholders in the regional tourism value chains, including regional and local administrations of culture and sports, chambers of commerce, local sports associations and teams. The first step in implementing this offer will be the identifying of unused assets and the creative searching for new ways to use them. The next step is to approve with all stakeholders the new direction of using these assets in a wider context. It is also necessary to decide on possible measures to obtain the necessary permits for the implementation of the respective activities (for instance, in national parks). The final stage of preparation for realization of the project of activating tourist and recreational activities during the off-season will be the development and implementation of relevant advertising and marketing plans, which is key to the success of the project.

3. Improvement of ecotourism and environmental measures in the region. The proposal is to improve the infrastructure of environmental tourism support and environmental protection measures (hiking, mountaineering, bird and animal monitoring, mountain bike, photo camping, camping, grasshopping, etc.), especially within the existing national parks of the regions. Participation in relevant activities in this area will attract the majority of stakeholders in the chains of the value of the tourist product. The governing bodies of national parks that exist in the regions are needed in this sense to establish and enforce national rules and conditions regarding which activities are allowed in the national park. Entrepreneurs will develop a product, provide services and operate in the open air in accordance with the framework established by the national park, and together with

them receive a portion of their income. The regional authorities should ensure the achievement of mutual agreement between the above-mentioned parties. In addition, the pattern of income distribution between national parks and enterprises that use their assets in joint activities should be reconciled.

4. Linking local cultural assets with innovative digital tools / programs and creating new business models. The proposal is to exploit local cultural resources with the use of innovative digital tools and information and computer technology to create new forms or models of doing business in the tourism sector. The proposed promotion will: (a) increase the level of publicity and awareness of the rich cultural heritage of Ukraine and the specific region; (b) promoting cultural tourism and encouraging participation in the creation of added value in this area by a wider range of stakeholders. The following key partners are needed to implement this proposal: regional / local authorities responsible for managing cultural heritage assets; entrepreneurs from various industries, who can use the brand associated with this cultural heritage; representatives of IT companies; social networking experts, social groups / organizations that can support the idea by introducing new forms of social innovation. Management and coordination of realization of this direction of activation of tourism activity (project) can be placed on the centres mentioned in clause 1.

5. Application of ICT for thematic routes. Development of an innovative tourism program with an emphasis on cultural-historical heritage. Creating an online platform to support personalized travel services. The idea of the proposal is to establish close cooperation between regional / local government bodies, universities, research centres and business in the process of creating modern ICT-based programs for thematic tourist routes. These measures will help: (a) to improve the capabilities of professional tourist guides, (b) to initiate the implementation of the concept of individual guides based on the interests of specific tourists, and (c) to set up a virtual tour management organization based on a public-private partnership. The following key partners are needed to implement the proposal: government bodies responsible for the development of culture and tourism, universities and academic institutions – to facilitate the resolution of the relevant legal aspects of the organization of thematic routes and access to open data, information sources; the private sector - to take the necessary measures for the current organization and management of the destination route. It should also be borne in mind that for the implementation of this direction guides with advanced skills are required as well as the issues of certification of this activity to be resolved. The implementation of the proposition requires the following steps: a) creating of an appropriate auxiliary structure with the necessary technical equipment - to maintain and up-to-date online plat-

form for personalized travel services; b) brand development of the routes and their promotion; c) collecting market data on demand for routes, analysing them; e) development of route content, with relevant data and auxiliary materials; and f) selecting and training of personnel for the implementation of the routes.

6. *Combining the history of the destinations and its cuisine to diversify the tourist routes.* Development of cooperative tourism projects for communication of localities, history and gastronomy. The idea of the proposal is to develop a gastronomic tourism strategy that will influence the development of tourism in the regions. The main goals of such a strategy are: the association of the history of the area with its specific cuisine or the accumulation of different cuisines (Ukrainian and national minorities); promotion of local dishes related to local legends, recipes, etc., and the combination of the above with famous cooks, local events, etc.; organization of gastronomic competitions in the cities of the region with the corresponding scheme of rewarding participants; development of new and modernization of existing tourist destinations related to agro-food chains of value creation. Various stakeholder groups, including regional authorities / local authorities, representatives of the hotel and restaurant business, producers of local food and wine and alcoholic beverages, research centres (in the field of history, anthropology, gastronomy), local higher education institutions and vocational training centres should participate in the development and implementation of such a strategy. It would be appropriate to establish a regional agreement on the food and beverages quality and price policy of all actors in the agro-food chains to create value in the tourism sector, as well as to strengthen cooperation with neighbouring regions and increase citizens' participation in the creation of co-operative projects for gastronomic tourism. Establishment of regional culinary centres, the main task of which will be to increase the knowledge of tourists and inhabitants about the possibilities of local cuisine, may become a specific organizational measure for the implementation of the above-mentioned strategy.

7. *Improvement of supply chain management system within tourist and recreational clusters.* Due to the lack of a well-established logistics and information system of the TRS in the regions of Ukraine, the promotion of regional tourism products is carried out in a disintegrated communicative environment. Clusters, the creation of which requires modern information provision and management mechanisms throughout the supply chain, as part of the creation of the value of a tourism product, is an important mechanism for the accumulation of tourist resources and their efficient use. This proposal concerns the necessary measures to ensure the sustainability of supply chains of tourist and recreational clusters that have developed or are being formed in the regions of the country.

The management of the chain of tourist services within the framework of regional tourist and recreational clusters involves the integration of the following key business processes: management of relations with consumers through the regional system of integrated marketing communications; informational service for tourists; management of orders execution; support of tourism products formation; monitoring and control of compliance with social and environmental standards in the process of providing tourist and recreational services and assessing the sustainability of the development of a tourist and recreational cluster based on a clear system of measurement the economic, social and environmental performance of the cluster; monitoring of risk factors in the activities of participants of the regional tourist-recreational cluster, development and support of implementation of preventive measures.

The current practice of creating and operating tourist and recreational clusters in the regions of Ukraine confirms the feasibility of introducing a management system aimed at ensuring the sustainability of supply chains in the activities of similar clusters in all regions. At the same time, experience in the formation of such systems in the country is absent, besides, there is a lack of necessary specialists who have knowledge and skills in the development and implementation of such control systems. Therefore, for the implementation of this proposal, it is necessary:

- to study, generalize and disseminate best foreign experience in the management of sustainable supply chains within touristic and recreational clusters, in particular in the European Union;
- to develop appropriate materials on the management of sustainable supply chains within the framework of tourist and recreational clusters and to provide open access to them via the Internet;
- to conduct a series of appropriate training in the regions for representatives of existing tourist and recreational clusters and specialists of regional governments and local self-governments which are responsible for the development of the TRS in the territories subordinated to it;
- to develop and include in regional universities the curricula on the supply chains management in the tourist and recreation cluster.

8. *To introduce a system of development of regional strategies of smart specialization in the regions with the potential for development of tourism and recreational activities.* The central element of the concept of smart specialization, which distinguishes it from the traditional schemes of innovation and industrial policy, is focusing on "entrepreneurial self-identification," which is a process by which entrepreneurs understand, what a particular product, service, or type of activity, can be produced or carried out on the territory with some competitive advantages and, possibly, at a lower cost, than in other regions. This process identifies priority areas of

activity in which the regions can specialize, in particular, measures to improve tourist and recreational infrastructure at the regional and national levels. Such strategies for smart specialization have been developed for the TRS in a number of European regions, in particular: Algarve (Portugal), Andalusia (Spain), Kujawsko-Pomorskie (Poland), Rhône-Alpes (France), Sicily (Italy), East Macedonia and Thrace (Greece) and others.

The European Commission in 2011 created a Platform to support the development of a strategy for smart specialization (S3Platform). This platform aims to help regions and states registered on it to design, implement and evaluate regional strategies for smart specialization, as well as assist regional representatives in identifying high value-added activities that offer the best chance to strengthen their competitiveness. Registration on the P3 platform is open to the regional and national authorities of the EU Member States, candidate countries for accession and the European Union's neighbours. Since 2014, the European Commission has established that European regions can receive funding from the EU Regional Development Fund only if there is a regional strategy for smart specialization registered with the S3 Platform (see: [61; 62]).

Studying the experience of the above-mentioned regions regarding the development of regional strategies for smart specialization with an orientation towards the TRS, as well as the registration of the respective Ukrainian regions on the European Platform to support the development of a strategy for smart specialization, will promote the dissemination of this tool in the practice of strategic management of tourism and recreation sector development in the Ukrainian regions. This will allow the regions to turn to European funds for funding in order to implement specific measures for the development of sustainable tourism and appropriate environmental measures. In addition, the presence of such a strategy in the region is considered as an articulated statement by local authorities and the business communities about the readiness to attract investment in the development of the TRS and provide appropriate preferences for private investors, including foreign ones.

Conclusions. For emerging economies as the Ukrainian one, the tourism and recreation sector represents increasingly essential opportunities for economic activity and employment diversification, and can show a strong capacity to compensate for weaker export revenues and taxes collected from stagnated traditional basic industries. However, the sector is still underdeveloped as jobs creator, investment attractor and innovation promoter in Ukraine.

The following suggestions aimed on sustainable tourism and recreation sector development in the Ukrainian regions are proposed in the paper: to improve management and coordination of the development, promotion and implementation of tourism products at the regional level by establishing appropriate regional cen-

tres with relevant competences; to design measures on season expansion for under-utilized regional tourism and recreation sector assets; to develop ecotourism and implement measurement of environmental consequences of TRS activities in a region; to linking local cultural assets with innovative digital tools / programs and creating new business models of tourism, fostering application of ICT for thematic routes and creating an online platform to support personalized travel services; to diversify the tourist routes by promoting new tourists products combined the history of the destinations and its cuisine; to improvement of supply chain management system within tourist and recreational clusters; to introduce a system of development of regional strategies of smart specialization in the regions with the potential for development of tourism and recreational activities.

Topics for further investigating and discussing.

The proposals contained in the paper are focused mainly on the regional and local level. Some researchers of this topic emphasize the priority of the central authorities regarding the development and implementation of a strategy and policy to support the development of the tourism and recreation sector. The author is in favour of the position that in the current conditions, a partnership between business and authorities at the local and regional levels has to play a crucial role in doing that while central authority has to create the appropriate institutional framework. Several topics are of great importance for further investigating of sustainable tourism and recreation issues. Among them are following that needed to highlight: Indicators and methods for measuring competitiveness and sustainability in tourism and recreation on regional and local levels; The public support of the technologies modernisation in tourism; Technology platforms for knowledge and tourist innovation networks (national and regional); Marketing of sustainable tourism.

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Лях О. В. Формування сучасного сталого сектору туризму і рекреації в Україні

У статті розглядається концепція сталого туризму на основі огляду літературних джерел, що відображають результати поточних досліджень за даною тематикою. Динаміка розвитку світового

сектору туризму та рекреації (ТРС) та тенденції його оцифрування досліджуються на основі вивчення наявних емпіричних даних та аналітичних звітів. Аналіз ситуації в ТРС України, існуючі проблеми та виявлення шляхів їх подолання, а також забезпечення сталого розвитку сектору, з урахуванням досвіду країн Європейського Союзу, дозволили запропонувати ряд відповідних заходів для забезпечення сталого розвитку туризму та рекреації на регіональному та місцевому рівнях.

Ключові слова: туризм, рекреація, сектор, стійкий розвиток, регіональний розвиток, інновації в туризмі, оцифрування, розумна спеціалізація.

Лях А. В. Формирование современного устойчивого сектора туризма и рекреации в Украине

В статье рассматривается концепция устойчивого туризма на основе обзора литературных источников, отражающих результаты текущих исследований по данной теме. Динамика развития мирового сектора туризма и рекреации (ТРС) и тенденции его оцифровки исследуются на основе изучения имеющихся эмпирических данных и аналитических отчетов. Анализ ситуации в ТРС Украины, существующие проблемы и выявление путей их преодоления, а также обеспечения устойчивого развития сектора,

с учетом опыта стран Европейского Союза, позволили предложить ряд соответствующих мер для обеспечения устойчивого развития туризма и рекреации на региональном и местном уровнях.

Ключевые слова: туризм, рекреация, сектор, устойчивое развитие, региональное развитие, инновации в туризме, оцифровка, разумная специализация.

Lyakh O. Formation of the modern sustainable sector of tourism and recreation in Ukraine

In the paper, the concept of sustainable tourism is explored through a literature review of current research on this topic. The dynamics of the global sector of tourism and recreation (TRS) development and trends of its digitising are investigated based on a study of available empirical data and analytical reports. Analysis of the situation with the TRS in Ukraine, existing problems and identification of ways to overcome them and ensure sustainable development of the sector, taking into account the experience of the European Union countries, made it possible to propose a number of appropriate measures for providing of the sustainable tourism and recreation sector development on regional and local levels.

Keywords: tourism, recreation, sector, sustainable development, regional development, innovations in tourism, digitization, smart specialization.

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