

Assessment of the State of Regional Tourist Services Market Infrastructure

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Abstract. The study of the impact of infrastructure on the development of the regional market of tourist services is an urgent issue of modern economic research since the effectiveness of tourism development, the level of use of the natural and cultural-historical potential of the region is largely determined by the capabilities of modern tourist infrastructure. The purpose of the paper is to assess the existing infrastructure of the tourist services market in the Transcarpathian region, identify problems in the infrastructure support of tourism, and determine the level of influence of infrastructure on the development of tourism in the region. General scientific research methods allowed achieving the purpose of the paper, including analysis, comparison, and generalisation. The paper considers the essence and factors of influence of the regional tourist services market infrastructure on its development. The study and assessment of the state of tourist infrastructure development were carried out based on the generalisation of statistical data and calculation of individual indicators that take into account the level of infrastructure elements' development: accommodation infrastructure, public catering, leisure and entertainment, transport, municipal, environmental, border infrastructure, health and safety infrastructure. A comparative analysis of indicators of the level of infrastructure development of the regional tourist services market with the average indicators of the regions of Ukraine is carried out and the rank (place) among similar values of indicators of the regions of Ukraine is determined. Based on the generalisation of the obtained data, a number of interrelated and interdependent problems of infrastructure development of the tourist services market in the Transcarpathian region are identified. Practical significance consists in identifying the main problems of infrastructure support for the tourist services market for their priority solution

Keywords: tourist infrastructure, service market, accommodation infrastructure, infrastructure assessment, infrastructure assessment indicators

The Problem Statement

The development of the regional market of tourist services is closely related to the tourist resources and tourist infrastructure available in the region, which either acts as a factor that discovers the resource potential and is the basis for market development or hinders the development of the tourist and recreational sphere. In Ukraine, many national and regional programmes and/or development strategies define the tourism and recreation sector as one of the most important priorities since it has a positive impact on the state of the economy, contributes to employment growth, investment inflows, and solving a number of other problems. Therewith, tourism covers many sectors of the economy

and is a complex system of intersectoral interaction, which requires a comprehensive approach to solving the problems of its development.

Most regions of Ukraine are characterised by infrastructure problems in the tourist and recreational sphere, which is the main reason for the decline in the competitiveness of the Ukrainian tourist product in the tourist services market. This is conditioned upon local, regional, and national characteristics: the specific features of tourist resources that determine the complexity and capital intensity of infrastructure, the scale of tourist activities at the appropriate territorial level, the effectiveness of public

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administration and spatial planning, the fragmentation of the target market, the level of attracting investment, the presence of competitive advantages, profitability and pay-back period of infrastructure facilities. It should also be considered that the long-term growth of the regional market of tourist services can occur only if the infrastructure of the regional tourism market and the regional tourism product constantly correspond to the needs of the target market segments, their adaptation to the impact of globalisation and competition processes, is based on the partnership between the public and private sectors. The problems associated with tourism infrastructure development are particularly noticeable in rural and mountainous regions, in many cases due to the incompatibility of public administration and regulatory objectives and the interests of the private sector. In the current conditions of increased competition in the tourism market, it is worth paying more attention to the study of the possibilities of using tourist resources in the region, in particular, based on the development of appropriate infrastructure, assessment of the impact of other sectors of the economy on the tourist services market, the development of public-private partnership and measures related to the conservation of nature and local cultural and historical heritage.

In this regard, it becomes relevant to conduct a quantitative and qualitative assessment of the tourist infrastructure of the region, compare it with other regions competing within the sub-regional market of tourist services, develop areas for the development and improvement of the infrastructure of the regional tourist services market.

Analysis of Recent Research and Publications

Today, there are many Ukrainian and foreign authors, including Ch. Cooper [1], K.V. Kryveha [2], M. Rohoza [3], M.V. Vynohradova, P.I. Soldatov [4], A.V. Kuzyshyn [5], V.B. Butorina, [6], S. Jovanović and I. Ilić [7], N.V. Boshota, V.V. Papp [8], M. Petrova [9], H.O. Horina [10], as well as other researchers, who have already paid attention to the study of the infrastructure of the tourist services market, studying its composition, structure, development factors, and determining territorial features.

For example, A.V. Velychkina [11], R. Dapkus, K. Dapkute [12]; V.V. Druzhinina, O.M. Zalunina [13], M. Petrova [9] investigated the impact of infrastructure on the development of tourism, and also assessed the state of the tourist services market infrastructure based on various methodological approaches. V.F. Arkhipova, A.S. Levizov [14], S.A. Boholiubova, D.F. Vasylykha [15], B. Seetanah [16] investigated the rational territorial-spatial planning of tourism and the improvement of the management system at the local, regional, and national levels, identified the basic factors that determine the nature of the development of tourist infrastructure in the regions.

Purpose of the Study

The purpose of the paper is to comprehensively assess the infrastructure of the tourist services market in the region and develop areas for its development and improvement.

Research Results

The infrastructure of the regional tourist services market unites diverse industries and activities of both material production and services. The interpretation of the essence of the tourist services market infrastructure is dominated by three main approaches: 1) theoretical and economic, as a special sphere of labour application; 2) structural, as a set of material objects; 3) functional, as a set of certain functions and/or types of economic activity.

In the first approach, infrastructure is defined as a set of industries that provide general conditions for social reproduction. According to the second approach, the infrastructure of the tourist services market is understood as "a set of material objects that are carriers of various material and non-material properties that ensure the maximum possible quantitative and qualitative implementation of tourist goals under certain spatial and temporal parameters (in a particular place and at a particular time)" [17]. The third approach involves considering infrastructure as a special set of elements (institutions, enterprises, organisations, systems) that perform organisational, production, social, and other functions to regulate, ensure the normal and uninterrupted functioning of the tourist services market, and the interaction of its subjects regarding the purchase, sale, and consumption of a tourist product.

Summarising the above approaches, the composition of the regional market infrastructure of tourist services can be defined as a set of enterprises that create conditions and directly take part in meeting the needs of tourists: production infrastructure (transport and logistics, utilities, material and technical support, construction, energetics, production of souvenirs and handicrafts, manufacturing of tourism and sports products, information and communication sphere, etc.) and infrastructure of the service sector (hotel management, public catering, cultural and entertainment sphere, recreational sphere, health, sports, education and science, etc.), as well as institutions, enterprises, organisations that ensure functioning of the market infrastructure (institutional organisations, financial and credit sphere, trade, exchange activity, innovation sphere, marketing and advertising, employment, etc.).

As part of the regional tourist services market infrastructure, one can also distinguish individual objects that indicate the involvement of entities responsible for their creation or maintenance. Commercial structures, such as hotels or restaurants, create and operate social infrastructure facilities to serve their customers (tourists). State bodies (local self-government bodies and state structures) develop social infrastructure not only to serve tourists but, first of all, to create conditions for the development of society (including tourists) and the economy (in particular, economic entities in the field of tourism). Such objects of industrial infrastructure are buildings, structures, and engineering objects, transmitting devices and networks, the infrastructure of the service sector – residential buildings, hotels, social facilities, cultural and household facilities.

Different approaches to the interpretation of the essence of the regional tourist services market infrastructure have led to the use of different methods of its assessment. Based on the generalisation of scientific literature [10; 11; 13; 16; 18], there are three approaches to assessing the development of tourist infrastructure:

- the first approach – the development of infrastructure in the regional tourist services market is evaluated through a set of its elements, namely quantitative indicators of infrastructure facilities and relative indicators (relative to the area of the region or the number of population). Assessment methods related to this approach are based on a system of statistical indicators and allow conducting a comprehensive economic and geographical study of infrastructure development in the territorial context, as well as identifying gaps in infrastructure support;

- the second approach is based on the use of indexes that reflect the state of infrastructure in relation to the base region (territory or country) or a certain regulatory value. The methods related to this approach reflect well the proportions in the infrastructure development of the region but do not reflect the level of importance of the development of its elements;

- the third approach is based on the construction of comprehensive models of infrastructure facilities that ensure the provision of a certain amount of services, that is, they reflect the ability of the region to receive the appropriate number of tourists over a certain period. Such models contain structural, functional, and spatial-territorial components. However, they also have a number of disadvantages since they do not quite clearly define the significance of an individual object within each group of infrastructure elements. Using the above approaches, the authors will assess the state of the tourist services market infrastructure in the Transcarpathian region.

The Transcarpathian region has an extremely favourable transport and geographical position, which, together with a considerable recreational, natural, historical, and socio-cultural potential, allowed forming a tourist complex of national and international importance. The determining

factor in the development of tourism in the region is infrastructure, which is one of the most important structural components of the regional market of tourist services. It is the availability of infrastructure that determines the great popularity of such main types of tourism in Transcarpathia as sanatorium-resort tourism, ski, gastronomic, ecotourism, sports and adventure, rural green tourism, religious, event tourism, etc.

To assess the level of development of tourist infrastructure and its impact on the volume of tourist services provided in the region, the following indicators were selected by structural elements:

- accommodation infrastructure – the number of hotels and similar accommodation facilities and the number of specialised accommodation facilities and places in them;

- public catering infrastructure – number of restaurants, cafes, bars;

- leisure and entertainment infrastructure – number of theatres and museums;

- transport infrastructure – density of public railway tracks, density of highways;

- information and communication infrastructure – volume of services in the field of telecommunications and communication;

- municipal infrastructure – equipment of apartments in residential buildings and non-residential buildings with a water supply and sewerage, hot water supply, heating;

- environmental infrastructure – volumes of capital investments for environmental protection and current costs for environmental protection;

- border infrastructure – number of existing border crossing points;

- health and safety infrastructure – the number of beds in hospitals, the number of doctors of all specialisations, the incidence of infectious diseases, the number of detected crimes.

Summary data for assessing the level of tourist infrastructure development in the Transcarpathian region are given in Table 1.

Table 1. Indicators of the level of Transcarpathian tourist services market infrastructure development

No.	Structural element	Indicator	Value	Average value	Rank
1.1.	Accommodation infrastructure	Number of hotels and similar accommodation facilities, units	208	99	4
1.2.		Availability of hotels for 1000 people	0.17	0.06	2
1.3.		Number of places, units	10169	5336	5
1.4.		Number of places per 1000 people, units	8.1	3.2	1
1.5.		Number of specialised placement tools, units	42	68.7	7
1.6.		Number of places in specialised accommodation facilities, units	5141	9026	8
1.7.		Number of places per 1000 people, units	4.1	5.35	10
2.1.	Trade and catering infrastructure	Number of food establishments (restaurants, cafes, bars), units	2655	1883	7
2.2.		Provision of food establishments for 1000 people	2.12	1.12	2
2.3.		Retail trade turnover, million UAH	18624.5	32613	17

Table 1, Continued

No.	Structural element	Indicator	Value	Average value	Rank
3.1.	Leisure and entertainment infrastructure	Number of theatres, units	5	5	7
3.2.		Number of viewers at performances, thousand	96.3	247.5	21
3.3.		Number of museums, units	14	23	19
3.4.		Number of museum visits, thousand	694.3	656	8
3.5.		Number of nature reserves and national parks	4	2.8	3
4.1.	Transport infrastructure	Density of communication routes, km per 1 thousand km²	261	282.3	16
4.2.		Public roads with hard covering, km	3336	6649	23
4.3.		Operational length of public railway tracks, km	624	902	18
4.4.		Density of public railway tracks, km per 1 thousand km² of the territory	49	38.3	4
4.5.		Passenger turnover of motor transport (buses), million pass. km	673	1420	22
4.6.		Road improvement: covered bus stops, units parking and recreation areas, units toilets, units	121	26317	0,46%
			43	5378	0,80%
	15		3376	0,44%	
5.1.	Information and communication infrastructure	Volume of services in the field of telecommunications and communication, million UAH	1146.4	2619.5	18
5.2.		Mobile subscribers, thousand	1457.5	2228	16
5.3.		Internet subscribers, thousand	509.5	945	19
6.1.	Municipal infrastructure	Equipment of apartments in residential and non-residential buildings (number), units	410706	683110	22
6.2.		Water supply and sewerage, units	306300	418681	12
6.3.		Hot water supply, units	236015	321761	12
6.4.		Heating, units	287385	468996	19
6.5.		Waste generation, thousand tonnes	186.3	14093	1
7.1.	Ecological infrastructure	Capital investment in environmental protection natural environment, million UAH	45.9	403	15
7.2.		Current costs of environmental protection, million UAH	226.2	972.7	20
8.	Borderline infrastructure	Number of active border crossing points, units	19	230	8,3%
9.1.	Health and safety infrastructure	Number of hospital beds, units per 1000 people	6.6	7.15	22
9.2.		Number of doctors of all specialisations, individuals per 1000 persons	3.87	4.4	16
9.3.		Incidence of infectious diseases, individuals per 1000 persons	0.11	0.43	4
9.4.		Number of detected crimes	11006	18006	7

Source: developed based on [19-21]

In the infrastructure of the regional tourist services market, one of the most important places for the development of internal tourism belongs to accommodation facilities. In 2018, there were 250 such enterprises created by legal entities and individual entrepreneurs in the region, including 208 hotels and similar accommodation facilities. The largest number of listed subjects is concentrated in the city of Uzhgorod, Svaliava district, Mizhhiria district, the city

of Mukachevo and Mukachevo district, Uzhhorod, Rakhiv, and Tyachiv districts [19]. In 2018, there were 10.2 thousand places in the total potential of collective accommodation facilities, the largest share of which (76.8%) was made up of places in hotels and similar accommodation facilities (hotels, motels). The Transcarpathian region ranks fifth among the regions of Ukraine in terms of the number of places in hotels and similar accommodation facilities

(hereinafter excluding the temporarily occupied territories of the Autonomous Republic of Crimea, Sevastopol, and part of the anti-terrorist operation zone), however, in terms of the number of places per 1000 people of the population – the first one.

The share of tourist flow in the Transcarpathian region in the structure of the national tourist flow is 0.56%. This indicates a predominant orientation towards visitors (both from other regions of Ukraine and from abroad). In 2018, 114.6 thousand travellers used the services of collective accommodation facilities (104.6 thousand of them were citizens of Ukraine, 10.0 thousand were foreigners) [19].

In general, quantitative indicators of collective and specialised placement tools indicate that their value is higher than the average among the regions of Ukraine. As for the

qualitative assessment of accommodation facilities, most establishments in the region belong to the non-star category (174 establishments out of 210, which mainly correspond to the level of two stars), three and four-star hotels, which meets the needs of tourists with below-average and average incomes. In particular, the ratings of tourists who were in collective accommodation facilities and left their ratings on the Booking.com website (Fig. 1), are as follows: 71% of institutions received a rating above 8 points (out of the maximum 10 points), another 10% – a rating of good (from 7.01 to 8 points), and 17% received a rating below 6 points. Despite the high rating of most establishments, there are establishments where the level of comfort of stay and the quality of services do not meet the needs of guests.

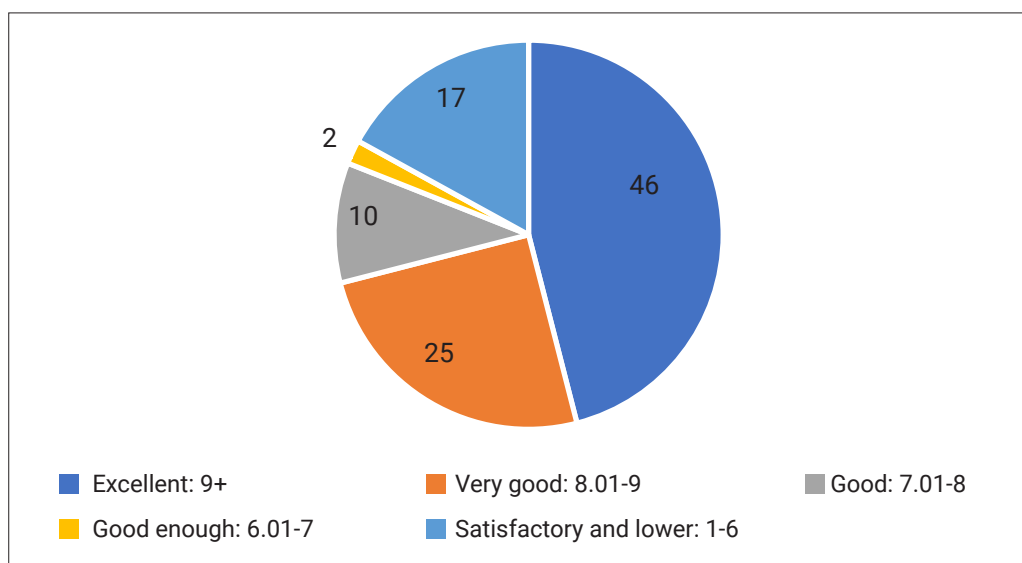


Figure 1. Guest ratings of Transcarpathian region accommodation establishments on the Booking.com website (as of 01.02.2020), in %

In terms of providing the infrastructure of the regional tourist services market with food establishments (restaurants, cafes, bars), Transcarpathia ranks second among the regions of Ukraine in terms of "provision of food establishments per 1000 people". The presence of a considerable number of food establishments and original local cuisine creates ample opportunities for gastronomic tourism. The main problem is the uneven placement of food establishments in cities and districts of the region. An equally important element of the market infrastructure is retail trade, which serves the local population and tourists, contributes to the better development of the tourist potential of the region.

An important segment of retail trade is the sale of souvenirs, products of local producers, and handicrafts. Transcarpathia has a considerable potential for the development of this segment of trade, for which it is necessary to develop local brands for traditional goods of local production (clothing, jewellery, food products, household goods, etc.).

The infrastructure of leisure and entertainment is represented in the Transcarpathian region by cultural and artistic institutions: theatres, philharmonic halls, museums, clubs, cinemas, concert organisations, culture and recreation parks, etc. Quantitative indicators of the number of institutions and their comparison with the indicators of other regions of Ukraine indicate their insufficient number, which limits the potential of cultural and educational tourism. However, this is compensated by such types of tourism as active, extreme, sports, ski, ecological, which is complemented by four nature reserves and national parks. The main problems in the infrastructure of leisure and entertainment are the following: non-compliance of services with modern standards of tourist services, insufficient information and communication support for events (local festivals and holidays), seasonality, which generates fluctuations in demand for services of leisure and entertainment enterprises.

The development of transport and transport infrastructure remains a factor hindering the development of the tourist potential of the region, as evidenced by both indicators of transport infrastructure that are below the average values among the regions of Ukraine, and reviews of tourists who visited Transcarpathia for tourist purposes. Only in terms of the density of railway tracks, Transcarpathia ranks fourth, which forms a considerable flow of tourists by rail transport. However, this does not solve the problem of transport infrastructure, since a considerable spread of tourist attractions and places on the territory of the region requires high-quality communication and ensuring transport accessibility of the main tourist places in mountainous areas.

The following problems of transport and transport infrastructure development in Transcarpathia can be identified:

- expanding the capacity, improving the technical quality of the road surface of existing road network and expanding the accessibility of individual tourist places;
- technological development of all types of transport and transport systems for the improvement of their safety, environmental friendliness, comfort, etc.;
- development of roadside infrastructure and arrangement of recreation areas for drivers and passengers (recreation areas, campsites, tourist bases, hotels, motels, gas stations, service stations, means of informing road users about the location of roadside and tourist infrastructure objects, etc.);
- development and arrangement of railway and bus stations, bus stops, information and related services in railway and road transport, car rental services;
- development of air connectivity and river transport. Both areas have potential for development in the Transcarpathian region, provided that a number of issues are resolved at the state level and investments are attracted. The existing Uzhhorod International Airport in the region requires solving the issue of using Slovak airspace, as well as investments in the development of a modern airport terminal, cargo terminal, and airfield infrastructure facilities.

Information and communication infrastructure is closely integrated into ensuring the activities of all subjects of the tourist market and has a decisive influence on the development of tourist flows. Information tourist portals and centres play an important role in ensuring the functioning of the regional tourist services market, as well as covering tourist places and objects with mobile communication networks, Wi-Fi, etc. On the other hand, modern achievements in computer technology and the information sphere encourage enterprises to focus on new sources of competitive advantages and create them. Among such new trends, a special place is occupied by the approach called sharing economy or share economy [22, p. 71]. Such sharing platforms as Couchsurfing, Hospitality Club, Airbnb, HomeExchange, Easynest, Surfair, Jump on Flyaways, BlaBlaCar, GetAround, Antlos, Boatbound, EatWith, etc.

create considerable competition for conventional types of travel business since they allow tourists to independently plan their trips, stay in private homes, reduce costs, share experience, evaluate and form a rating of tourist enterprises, institutions, and organisations of tourist infrastructure, tourist places, and regions by tourists themselves and the dissemination of their personal impressions and experience of interaction with the subjects of the tourist services market through special internet portals, blogs, or social networks [23, p. 140]. Weekend trips are in high demand. Active forms of recreation replace passive ones.

This situation requires adaptation of the activities of tourist enterprises and infrastructure entities through the development and implementation of innovations (new services, routes, unique tourist products, new ways of interacting with customers, increasing the consumer utility of services, improving security), and also increases the role of local authorities and industry associations to coordinate actions, improving the availability and simplicity of systems for interacting with visitors, improving the quality of services and the level of security.

Municipal infrastructure, environmental infrastructure, and health and safety infrastructure are mainly focused on serving the population, enterprises, and organisations of the region and are not sufficiently aimed at servicing the regional market of tourist services. Among the many issues, one of the central ones is the problem of solid waste formation and management.

For the sustainable development of tourism in the Transcarpathian region, it is necessary to ensure the development of both internal, and inbound and outbound tourism. In particular, there is a considerable imbalance between internal and outbound tourist flows, as well as an insufficient level of development of inbound tourism (Fig. 2). Considerable fluctuations in the volume of tourist flows are caused both by the high sensitivity of the tourist services market and the influence of a significant number of factors (the level of income of the population, security, popularity, etc.), as well as by the imperfection of the existing system of tourism statistics in which a large number of tourists are not included in official statistics. This is also explained by a decrease in demand for group trips and the activation of individual tourism, as well as an increase in the number of independently organised trips. Modern information technologies have created a wide range of tools for individual travel planning and expanded the possibility of implementing tourist services directly by tourism entities, provided direct interaction between the manufacturer and the consumer of tourist services. The Transcarpathian region is a border region and to use all the advantages of the border and cross-border cooperation, including in the field of tourism, it is necessary to develop border infrastructure. Nowadays, the number of border crossing points, their capacity, and the arrangement of infrastructure facilities are insufficient to serve incoming and outgoing flows.

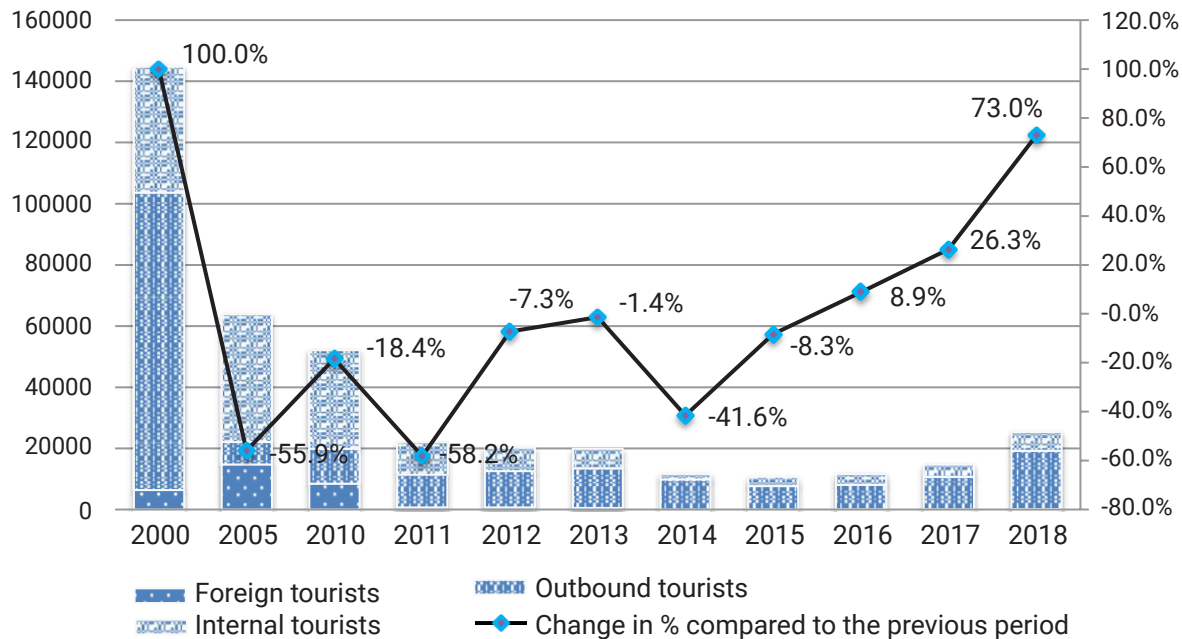


Figure 2. The number of tourists served by tour operators and travel agents, by type of tourism in the Transcarpathian region, persons

Source: developed based on [21]

Despite the recognition of the tourist and recreational sphere as one of the priorities in the structure of the regional economy, the development of the regional tourist services market in the Transcarpathian region is characterised by heterogeneity. Assessment of the level of infrastructure of the regional market development established a number of problems that hinder the development of tourism in the region due to insufficient material, technical, and information support of infrastructure facilities.

Conclusions

The analysis and comprehensive assessment of the tourist services market infrastructure in the Transcarpathian region allows drawing the following conclusions:

- the development of the regional tourist services market largely depends on the state and dynamics of its infrastructure development;
- assessment of the tourist services market infrastructure of the Transcarpathian region by individual indicators

identified both components that contribute to the development of tourism and elements that hinder its development. In general, the generalised indicator for assessing the infrastructure of the tourist services market in the Transcarpathian region is above the average level in Ukraine, mainly due to the highest level of development of accommodation facilities and public catering establishments;

- the main infrastructure elements that hinder the development of tourism in the region are: transport infrastructure, municipal infrastructure, leisure and entertainment infrastructure, and border infrastructure;

- insufficiently developed but without a considerable deterrent impact on the development of the tourist services market in the region: information and communication, environmental, and health and safety infrastructure.

Further research should be aimed at developing the concept of an optimal model of the tourist services market infrastructure of the Transcarpathian region, considering the specific features of tourism development in the region.

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Оцінка стану інфраструктури регіонального ринку туристичних послуг

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Анотація. Дослідження впливу інфраструктури на розвиток регіонального ринку туристичних послуг є актуальним питанням сучасних економічних досліджень, оскільки ефективність розвитку туризму, рівень використання природного і культурно-історичного потенціалу регіону багато в чому визначається можливостями сучасної туристичної інфраструктури. Метою статті є оцінка наявної інфраструктури ринку туристичних послуг Закарпатської області, виявлення проблем в інфраструктурному забезпеченні туризму та визначення рівня впливу інфраструктури на розвиток туризму в регіоні. Досягнення мети наукової статті уможливили загальнонаукові методи дослідження, серед яких аналіз, порівняння та узагальнення. У статті розглянуто сутність, чинники впливу інфраструктури регіонального ринку туристичних послуг на його розвиток. Проведено дослідження й оцінку стану розвитку туристичної інфраструктури на основі узагальнення статистичних даних та розрахунку окремих показників, що враховують рівень розвитку елементів інфраструктури: інфраструктури розміщення, громадського харчування, дозвілля та розваг, транспортної, комунальної, екологічної, прикордонної інфраструктури та інфраструктури охорони здоров'я і безпеки. Проведено порівняльний аналіз показників рівня розвитку інфраструктури регіонального ринку туристичних послуг із середніми показниками регіонів України та визначено ранг (місце) показника серед аналогічних значень показників регіонів України. На основі узагальнення отриманих даних виділено низку взаємопов'язаних і взаємозалежних проблем розвитку інфраструктури ринку туристичних послуг в Закарпатській області. Практичне значення полягає у виокремленні основних проблем інфраструктурного забезпечення ринку туристичних послуг для їхнього першочергового вирішення

Ключові слова: туристична інфраструктура, ринок послуг, інфраструктура розміщення, оцінка інфраструктури, показники оцінки інфраструктури
