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REGIONAL AND DEMOGRAPHIC TOURISTS' INFLOWS DISTRIBUTION AS A FACTOR OF THE NATIONAL TOURISM COMPETITIVENESS

Basing on the analysis of statistical data the paper examines the level of tourist flows' concentration in the countries which are global tourism leaders and also BRICS countries. The paper concludes that there is an interdependence between international tourist traffic concentration and dynamics of national tourism competitiveness. Authors' recommendations are aimed to improve the strategic guidelines of state tourist industry incentives in the countries characterized by different rates of international tourism flows concentration.

Keyword: tourist flows; international tourism; government incentives; global competitiveness.

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РЕГІОНАЛЬНИЙ ТА ДЕМОГРАФІЧНИЙ РОЗПОДІЛ ТУРИСТИЧНИХ ПОТОКІВ ЯК ЧИННИК НАЦІОНАЛЬНОЇ ТУРИСТИЧНОЇ КОНКУРЕНТОСПРОМОЖНОСТІ

У статті на основі статистичного аналізу оцінено рівень концентрації туристичних потоків у країнах — світових лідерах з туризму, а також у країнах БРІКС. Доведено існування взаємозалежності між концентрацією міжнародних туристичних потоків та динамікою національної туристичної конкурентоспроможності. Авторські рекомендації спрямовано на корегування стратегічних орієнтирів в аспекті просування галузі туризму в країнах з різноманітними територіальними показниками концентрації туристичних потоків.

Ключові слова: міжнародний туризм; державне стимулювання; глобальна конкуренція.

Рис. 1. Табл. 5. Літ. 10.

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РЕГИОНАЛЬНОЕ И ДЕМОГРАФИЧЕСКОЕ РАСПРЕДЕЛЕНИЕ ТУРИСТИЧЕСКИХ ПОТОКОВ КАК ФАКТОР НАЦИОНАЛЬНОЙ ТУРИСТИЧЕСКОЙ КОНКУРЕНТОСПОСОБНОСТИ

В статье на основе статистического анализа оценён уровень концентрации туристических потоков в странах — мировых лидерах туризма, а также в странах БРИКС. Доказано существование взаимозависимости между концентрацией международных туристических потоков и динамикой национальной туристической конкурентоспособности. Авторские рекомендации направлены на корректировку стратегических ориентиров в аспекте продвижения отрасли туризма в странах с различными территориальными показателями концентрации туристических потоков.

Ключевые слова: международный туризм; государственное стимулирование; глобальная конкуренция.

Introduction. The role of tourism in today's world is determined not only by its economic importance for host regions, cities and countries, but also by its direct impact on the living conditions of the receiving societies (infrastructure, business activity, regions' integration into the world economic space, investment attractiveness, human and innovation potential etc.). Due to this, regions which are actively involved in international or national tourists' exchange traditionally have higher rates

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of social and economic development (Kleiner et al., 2008), higher labor productivity, and trade concentration, better indicators of innovation and investment potential.

Concentrated tourism development can significantly improve the efficiency of budget infrastructural spending, profitability in tourism, it also provides possibilities to optimize regional development planning (Agafonov, 2011: 77).

In this regard, issues and problems of zoning tools application in country's socioeconomic development strategizing remain relevant both in geographically large and internally differentiated states (such as Russia, Brazil, India or China) and also in the countries characterized by uneven territorial distribution of tourism resources and other factors of tourism production.

The purpose of this research which is based on the analysis of tourism statistical indicators in the selected countries is to define the relationship between inbound tourism flows concentration and the effectiveness of governmental programs on national tourism competitiveness stimulation.

According to this purpose the following research objectives were set:

- to offer authors' method of determining the level of regional and demographic concentration of inbound tourism traffic;
- to determine the dynamics of these criteria in the countries – leaders of global tourism in 2014;
- on the basis of the research results on tourism competitiveness around the world to prove its reasonability by the level of regional and demographic concentration of inbound tourist flows;
- to analyze the actual features of regional and demographic distribution of inbound tourists flows in the leading countries of the global tourism today;
- to propose practical recommendations on national (regional) stimulation of tourism development in the countries with varying degrees of tourist arrivals regional and demographic concentration.

Hypotheses of the study:

- the level of regional and demographic concentration of inbound tourists flow of the country directly affects the performance of the national transport sector competitiveness. At the same time air transportation is largely dependent on the level of regional tourism rather than on demographic concentration of inbound tourism flows;
- demographic concentration of inbound international tourism serves as an important factor of national hospitality industry competitiveness rather than the factor of region's involvement in tourism export;
- price competitiveness in national tourism industry is directly dependent on demographic and regional concentration of inbound tourism flows.

Methodology and stages of our research. As an object for our study we identified 13 countries, which are global leaders by the number of annual international tourists arrivals in 2014 (according to the UNWTO data) and BRICS countries (China and Russia are also included in the top 10 by the number of international tourist arrivals in 2014).

The methodology used in this study consists of the following steps:

1. Analysis of statistical indicators of inbound tourism development in the countries, including the total number of international tourist arrivals, as well as regional

(cluster) structuring of inbound international tourism in destination countries (Table 1).

Table 1. Regional distribution of inbound tourists' flow in the analyzed countries, 2014, calculated by the authors using the data from (UNWTO, 2015)

		Regional distribution of inbound tourists' flow, 2014					
		Tourism region # 1 ¹⁾		Tourism region # 2		Tourism region # 3	
		Region	% ²⁾	Region	%	Region	%
1	Germany	Bavaria	26.8	Baden – Württemberg	13.8	Nord Rein – Westphalia	13
2	Turkey	Antalya	32	Istanbul	27	Lycia	15
3	USA	New-York	21	Orlando	19	Los-Angeles	14
4	China	Hainan	27.7	Hong-Kong	22	Yunnan	18
5	Brazil	Sao-Paolo	38.6	Rio-de-Janeiro	19.2	Parana	14
6	India	Maharashtra	24.7	Tamil Nadu	17.2	Delhi	11.3
7	South Africa	West Capes	44	Gauteng	16.2	Capes province	11
8	UK	England	90	Scotland	6.4	Wales	2.1
9	France	Ile de France	19	Cote d'Azur	12.9	Alps	7.6
10	Thailand	Bangkok	27.5	Pattaya	15.4	Phuket	14.3
11	Italy	Veneto	10.4	Lombardy	6.9	Lazio	6.64
12	Spain	Catalonia	25.7	Baleares	21	Andalusia	16
13	Russia	Moscow region	56	Leningrad region	22	Primorye region	6

¹⁾ Regions are ranked by their share in the structure of national inbound tourists flow.

²⁾ Share in national inbound tourists' flow.

2. Analysis of geographic and demographic variables of the considered countries, including the shares of the largest tourism clusters in national population and territory (Table 2).

Table 2. Geographic and demographic varies of the considered regions with the highest inbound tourists' flows concentration, 2014, calculated by the authors on the data from (UNWTO, 2015)

		Geographical and demographical indices of regional development					
		Tourism region # 1		Tourism region # 2		Tourism region # 3	
		% ¹⁾	% ²⁾	%	%	%	%
1	Germany	15.5	19.7	13	10	21.9	9.5
2	Turkey	12.7	11.9	30	9.2	13.1	11.2
3	USA	6.1	1.4	11.9	4.5	6	1.9
4	China	0.63	0.3	0.7	0.01	3.3	4
5	Brazil	21.6	2.9	8.4	5	5.5	2.3
6	India	9.2	9.2	5.9	4	1.3	0.004
7	South Africa	11.3	10.3	12.7	13.7	24	1.5
8	UK	84.1	53.4	8.2	32.5	4.7	8.2
9	France	18.7	2.2	7.7	5.7	9.8	7.9
10	Thailand	12.7	0.2	2.4	0.8	0.8	0.1
11	Italy	8	7.9	16.1	7.6	9.3	5.6
12	Spain	15.9	6.3	2.2	0.9	17.8	17.4
13	Russia	12.9	0.2	4.6	0.5	1.4	0.9

¹⁾ Region's share in national population.

²⁾ Region's share in the national territory.

3. Calculation (based on the methodology for Gini coefficient computation (Dixon et al., 1987) for the indices of regional and demographic concentration of international tourists flows; comparison of findings with the dynamics and development level of the international tourism industry in the studied countries (Table 3).

Table 3. Concentration of tourists' arrivals in the countries – global tourism leaders, 2014, calculated by the authors

	Countries	Concentration of inbound tourist flows			Countries	Concentration of inbound tourist flows	
		Regional	Demographic			Regional	Demographic
1	Germany	0.143574	0.097314	8	UK	0.363333	0.060901
2	Turkey	0.44874	0.25695	9	France	0.264189	0.034705
3	USA	0.46813	0.3122	10	Thailand	0.561891	0.381881
4	China	0.65259	0.64526	11	Italy	0.030249	0.08
5	Brazil	0.631966	0.343742	12	Spain	0.439821	0.29443
6	India	0.379117	0.355133	13	Russia	0.83296	0.6488
7	South Africa	0.483224	0.387654				

In this study, as a measure for regional concentration of inbound tourists flows we consider the correlation of 3 leading tourist regions' of the country shares in the total structure of inbound international tourist traffic with their share in the states' territorial composition.

As a demographic concentration of inbound tourists flows we consider the correlation of 3 leading tourist regions' of the country shares in the structure of inbound international tourist traffic to their shares in the total population structure of the analyzed state.

Similarly with the Gini coefficient, high level of regional concentration of inbound tourists' arrivals determines unfairly high concentration of foreign tourists in small geographic regions (clusters). High rates of demographic concentration of inbound tourists flows are typical for the countries where foreign tourists are disproportionately highly concentrated in the regions with small volume of local population. In any case, high levels of both coefficients indirectly demonstrate a high importance of certain regions in foreign tourists reception (Ermishina, 2005; Bolshakov, 2012: 53), in distribution of national tourist, hotel and transport industries' enterprises.

4. There is no data on correlation between the coefficients of regional concentration of inbound tourists' flows and indicators of national tourism industry global competitiveness (Table 4), such as the level of national airlines, land transportation, hospitality, communications competitiveness and price competitiveness of tourism industries in the analyzed countries (Blanke and Chiesa, 2015).

Findings of the study. Correlation of the indicators of the national tourism industry competitiveness and calculated indices of regional and demographic inbound tourist flows' concentration (Table 5) allows determining:

1. The level of the national land passenger transport competitiveness is strongly correlated with a magnitude of tourist arrivals demographic concentration. At the same time the degree of negative impact of high inbound tourists' flows demographic concentration on national air transportation system is significantly lower.

Table 4. Indicators of competitiveness for national tourism industries, 2014,
calculated by the authors, using (Blanke and Chiesa, 2015)

	Countries	Competitiveness of national:				Price competitiveness of national tourism industry
		Air transportation	Transportation by land	Hotel industry	Industry of communications	
1	Brazil	3.75	2.57	4.39	3.49	3.67
2	China	4.28	4.13	2.52	3.03	4.88
3	France	5.39	6.24	6.1	5.2	2.96
4	Germany	5.39	6.22	5.73	5.39	3.7
5	India	4.18	4.44	2.64	2.09	5.11
6	Italy	4.55	4.53	7	4.3	3.4
7	Russia	4.33	3.13	4.93	4.16	4.54
8	South Africa	3.97	3.79	4.53	2.82	4.55
9	Spain	5.29	5.87	6.71	4.53	4.11
10	Thailand	4.62	3.81	5.17	2.63	5.03
11	Turkey	4.47	4.08	4.76	3.1	3.98
12	UK	5.61	5.78	5.76	5.43	3.05
13	USA	6.16	5	6.27	5.08	4.29

Table 5. Indicators of correlation between the coefficients of inbound tourists flows' concentration and Tourism Global Competitiveness Index, 2014,
calculated by the authors, using (Blanke and Chiesa, 2015)

	Coefficient of inbound tourists concentration	
	demographic	regional
Global competitiveness of:		
- national air transportation	-0.51669	-0.38697
- national transportation by land	-0.68093	-0.66684
- national hotel industry	-0.63427	-0.49929
- national communications	-0.5735	-0.39844
Price competitiveness of national tourism	0.79695	0.552194

2. Similarly, high degree of demographic concentration of tourists inbounds flows sharply negatively impacts on the competitiveness of the hotel industry and the communications sector (due to non-equality of labor resources demographic distribution and demand for a national hotel product) (Kropinova and Mitrofanova, 2011: 43).

3. Finally, we can note high positive correlation between demographic and regional concentration of inbound tourists' flows and national tourism industry price competitiveness. Despite the negative impact of high regional and demographic concentration of inbound tourism on the efficiency of national transport, hotel or communication areas, these coefficients have positive effect on the growth of price adequacy of national travel services to the world market trends.

This can be explained by increasing competition in the regions involved in tourism, striving to increase the quality of their tourism services in the regions with high concentration of foreign tourists and differentiated local tourism product, by relocation of traditional industries' within tourism (regional economic system reori-

entation), by professionalization of tourism business in regions, as well as through government (regional, municipal) control and stimulation.

Limitations of the study and directions for further research. The proposed original method of determining regional and demographic concentration of inbound tourists flows can be used in the process of modernization of national (regional, municipal) strategies supporting and stimulating tourism, reducing the negative impact of international tourism on socioeconomic conditions of local population and interests of traditional national businesses not directly related to these services.

Meanwhile, it has to be noted that this study was carried out on the example of 13 countries which are global tourism leaders, thus their national statistics and indicators may not really reflect the global patterns of regional and demographic concentration of inbound tourists flows and their impact on the tourism industry and national economic system – overall.

In the future, studies on the criteria of tourist flows concentration and problems of international tourism regionalization, for example, in the countries with active tourism development (the Middle East, Southeast Asia, the Caribbeans), countries of unsustainable tourism development, countries' with the highest tourism industry localization can be conducted.

Studies on national outbound tourist flows generation, patterns of its demographic and regional distribution, correlation of its performance and dynamics of inbound international tourism also seem to be a very promising direction.

Regional concentration of inbound tourists' flows

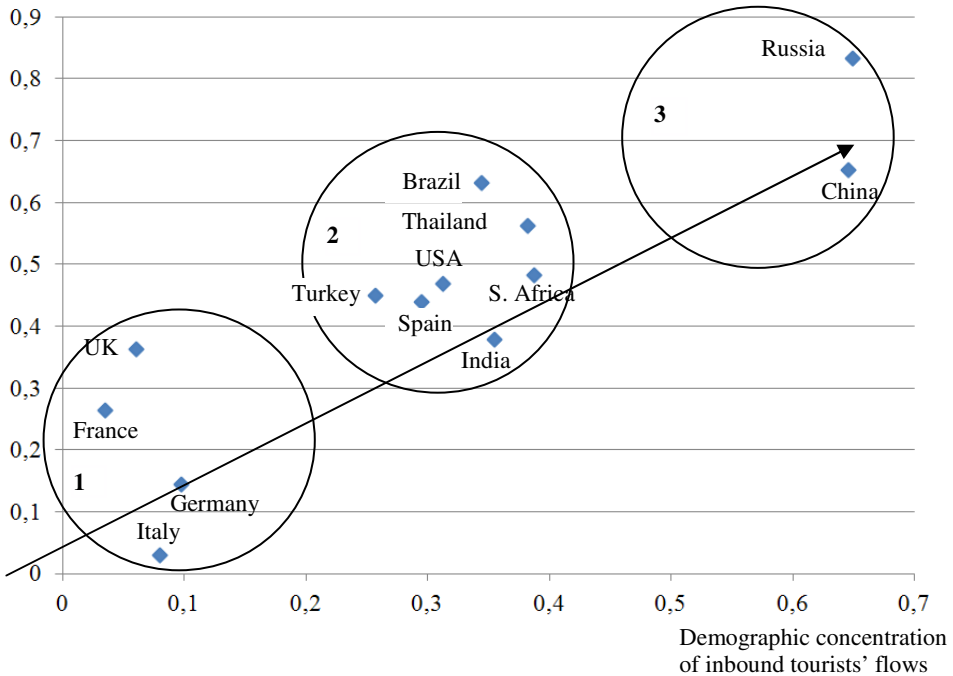


Figure 1. Positioning of the countries – world tourism leaders, by the level of tourist arrivals' in regional and demographic concentration, authors'

Conclusions and recommendations. The results of the study on demographic concentration of tourists' arrivals reflect that Italy, France, Britain and Germany (Figure 1) are the closest ones to ideal distribution of international tourists between local population. While in China and Russian Federation the distribution of international tourist flows among local population is the most uneven.

Italy and Germany are also the leaders among the studied countries by the equality of inbound tourists' flows territorial distribution. Again, Russia holds the last position here (with a large gap from the other territorially large countries – China and Brazil), that proves great degree of inbound tourist flows' concentration in geographically small regions.

The investigated countries' positioning depending on both coefficients of regional and demographic concentration of inbound tourism flows shows that the analyzed countries can be roughly classified into 3 types (circles in Figure 1).

In the first type of countries (Italy, France, Germany, the United Kingdom) implementation of the cluster approach to further development of international tourism will be inefficient due to equal distribution of tourist resources and tourist production factors (such as in Germany), or by simultaneous concentration of international tourism industry and other industrial, financial, human resources and innovation potential of the country in the same region (such as in the UK).

Priority of national policies of tourism stimulation in these countries should be based on the principles of national tourism supply increase (offer tours of varying duration, targets and service level), and reducing of tourism seasonality.

In the countries of the third type (China and Russia), role of tourism zoning in modernization of national tourism industry and inbound tourists' flows distribution is vital. And clustering under the national tourism development strategy will be most effective in terms of financing, investment attractiveness, prospects of promotion at global tourism markets.

Effectiveness of tourism supporting programs in the context of international tourist traffic synchronization and increasing of share the local population involved in export of tourists services, will largely be determined by territories and population in the priority zones for tourism and recreation development.

For Russia and China we can recommend the strategies of tourism development within the transport corridors East-West, and also tourism regional specialization (like already implemented tourism projects of gambling zones in Russia, ski tourism areas in Inner Mongolia, river cruise programs in Central China).

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Стаття надійшла до редакції 11.02.2016.