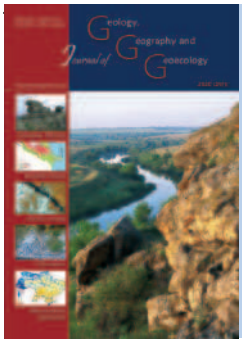

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Dynamics and geographical structure of inbound tourism in political transit countries: case of Ukraine

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Abstract. Ukraine is an important component of the world market for inbound tourism. From the beginning of the twentieth century in some years it was included in the list of the world leading tourist countries in terms of international tourist arrivals. To study modern trends in the development of inbound tourism in Ukraine, during the period of independence, the concept of tourist transit, developed by D. Hill, is applied. It is a part of the wider concept of political and economic transit, well known in the social sciences. The indicators of dynamics of tourist arrivals, incomes from incoming tourism and its geographical structure analyzed in the article indicate incompleteness of tourist transit in Ukraine. Tourist arrivals in Ukraine are more vulnerable to economic and political crises compared with developed countries. Incomes from foreign tourism are an order of magnitude lower. The share of several neighboring countries – Moldova, Belarus, Russia, Poland, Romania, and Hungary – in the geographical structure of the inbound tourists is too high. Accordingly, the index of geographical concentration of inbound tourism is considerably higher than the optimal one; that is the market of inbound tourism in Ukraine is not sufficiently diversified. The development of tourism is negatively affected by the unsettled military conflict in the eastern part of the country. Some indicators of the development of inbound tourism, in particular, its excessive dependence on Russia by 2014, too high share in the structure of arrivals of tourists from countries that were a part of the former USSR, bring Ukraine closer to post-colonial countries. For the sustainable development of inbound tourism in Ukraine, it is necessary to continue the democratic reforms in order to complete the political transit, to overcome finally the consequences of the domination of the communist authoritarian regime. Also, important tasks are the settlement of the political conflict in the East, the improvement of the tourism policy and the improvement of branding of the national tourism product, the creation of competitive niche tourism products, as well as the improvement of the quality of tourist services. If these tasks are not fulfilled, foreign tourism in Ukraine will enter the stage of stagnation.

Keywords: inbound tourism, political transit, postcolonialism, crisis, Ukraine, tourism transition model.

Динаміка і географічна структура в'їзного туризму в країнах політичного транзиту: приклад України

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Анотація. У статті проаналізовано динаміку та географічну структуру в'їзного туризму в Україні за останні два десятиліття в контексті концепції туристичного транзиту, яку розробив Д. Хілл, як складову ширшої концепції політико-економічного транзиту. Основою аналізу були статистичні матеріали про кількість туристичних прибуттів в Україну та їх розподіл за країнами, які порівнювалися з аналогічними даними в сусідніх країнах. На основі аналізу потоків іноземних туристів встановлено факт незавершеності туристичного транзиту в Україні. Виявлено, що туристичні прибуття в Україні значно більше вразливі до економічних й політичних криз, порівняно з сусідніми країнами, які минули стадію транзиту. Це підтверджено на прикладі криз 2008–2009 рр. та 2014–2015 рр. Доходи від іноземного туризму, за матеріалами офіційної статистики, є на порядок нижчими, від сусідніх держав Європейського Союзу, однак дуже значною є частка тіньового сектору туристичної економіки. В географічній структурі в'їзних туристів надто великою є частка декількох сусідніх країн: Білорусі, Молдови, Польщі Росії, Румунії, Угорщини. Індекс географічної концентрації в'їзного туризму є вищим від оптимального, тобто ринок в'їзного туризму в Україні недостатньо диверсифікований. Суттєвим фактором, що стримує збільшення та диверсифікацію потоків в'їзного туризму, є продовження військових дій на сході держави. Деякі показники розвитку в'їзного туризму, зближують Україну з постколоніальними країнами, зокрема, надмірна залежність його до 2014 р. від Росії, а також надто висока частка

в структурі прибуттів туристів із країн, що були в минулому республіками колишнього СРСР. Окреслено шляхи вирішення проблем розвитку туристичної галузі України, що зумовлені незавершеністю політичного транзиту. Вони пов'язані головно з поліпшенням туристичної політики держави, створенням умов для впровадження на ринку міжнародних туристичних послуг конкурентних туристичних продуктів.

Ключові слова: в'їзний туризм, політичний транзит, постколоніалізм, криза, Україна, модель туристичного транзиту

Introduction. Ukraine is a very interesting object for research the problems of the development of inbound tourism. At the beginning of the XXI century, only 10 million foreign tourists arrived in the country annually. However, in a few years, according to UNWTO statistics (on the basis of international tourist arrivals), twice, in 2007 and in 2008, Ukraine was ranked in the "top-10" of the leading tourist countries, ranking 8th and 7th places, respectively. In 2008, which was the best year for the tourism industry of the country, Ukraine has accepted more than 25.4 million foreign tourists so, that only the famous leaders in Europe: France, Spain, Italy, and Great Britain were ahead by this indicator. In 2018 the share of Ukraine was 5.2% of the total tourist arrivals in Europe and 2.7% – in the world. During the seven years 2007-2013, the number of international tourist arrivals in Ukraine has steadily exceeded 20 million people, which allowed it to enter the "top-20" countries of inbound tourism worldwide (UNWTO, 2010; UNWTO, 2014). However, in 2014 it was visited by only 12.7 million tourists, which was almost twice less than in the previous year (UNWTO, 2015).

To understand the dynamics of changes in the inbound tourism of Ukraine, first of all, it is necessary to analyze the basic political and economic preconditions for the development of tourism, which were formed in the state in the end of the XX – in the first decades of the XXI century. From this analysis, there are three very important conclusions. Firstly, Ukraine is still a state of political transit. Since the 1980s, when Ukraine was an integral part of the Soviet Union, it began the process of changing the political regime: the transition in the political sphere from the command and administrative system of management of society to democratic, in the economy – from the non-market distribution system to the market. However, this transit has not yet been completed in it, unlike in the most of the other post-communist countries. Ukraine is the largest post-socialist state today, where the transitional government and the hybrid regime have preserved according to the data of the non-governmental human rights organization Freedom House (Freedomhouse, 2018). In addition to it, this group includes only countries with a significantly smaller area and population, in particular, Georgia, Moldova, Albania and some other countries in the Balkans.

Secondly, Ukraine is a post-colonial state for a number of reasons (Velychenko, 2004; Ryabchuk, 2011). Before the First World War, for a long period, its territory was the part of two empires – the Russian and Austro-Hungarian. Until 1991, when the independence was proclaimed, Ukraine was the part of the Soviet Union. In the opinion of some researchers, the internal and external policies of the USSR had features that were typical for the colonial empire (Kuzio, 2002).

Thirdly, the development of tourism in Ukraine has been affected by the longest after the Second World War and the largest in terms of military-political conflict in Europe. This conflict was caused by the illegal annexation of Crimea by Russia in March 2014, and then its support for separatism in the East of Ukraine. It has been going on for five years and still does not allow Ukraine to stabilize finally the political and economic situation.

Political and economic transit, post-colonialism, the political crisis and military conflict are very important factors hindering the development of tourism, especially in Europe. They have been attracted the attention of leading tourism professionals for decades. That is why, the research of dynamics, structure and trends of the development of the inbound tourism in Ukraine in the XXI century are important for the development of the theory and practice of tourism science.

Literature Review. There are quite a lot of publications on various tourism development issues in different countries of the world, in particular in Central and Eastern Europe, including those relating directly to inbound tourism and factors that form its flows. These publications provide a reliable theoretical and methodological basis for the analysis of flows of inbound tourism in Ukraine. However, the dynamics of flows of inbound tourism to Ukraine for a long period in the context of the concept of tourist transit is insufficiently studied.

The question of the impact of political transit on tourism development in Central and Eastern Europe was analyzed by D. Hall in a number of scientific articles (Hall, 2008; Hall, 2011). He developed his own tourism transition model, which reflected the stages of changing the tourism industry of authoritarian countries that chose the path to democracy. D. Hall

concluded that in the post-communist countries, two of the most important components of the transition "from subsidized domestic and prescribed inbound and outbound international tourism to unsubsidized domestic and unfettered international inbound and outbound tourism" are equilibrium and dynamism. In the process of transforming the tourism industry, there is a certain balance between mass and niche tourism activities, between the roles of the private and public sectors, as well as between a large but dynamic and ever-changing number of small specialized firms and small but powerful multifunctional horizontally and vertically integrated transnational corporations. Spatial dispersion and diversity of tourism are developing along with it, and the situation is constantly changing the nature of products and markets, reflecting the demand variability and tourism fashions, and fluctuating of destination popularity (Hall, 2004a).

D. Hall is also the editor of the scientific monograph "Tourism and Transition Governance, Transformation and Development", which explores the features of transit tourism in the Central and Eastern Europe (CEE). This book analyzes the experience of the transformation of the tourism industry in the process of transition to market conditions in Poland, Hungary, Estonia, Kyrgyzstan, Malta, and some other countries (Hall, 2004b).

Important for the analysis of inbound tourism in Ukraine are publications devoted to the peculiarities of its development in those countries of Central Europe, which have a common problem with the tourism industry in Ukraine, they are direct competitors of Ukraine, in particular, Poland, the Czech Republic, and Slovakia, Romania, and Bulgaria. All of them were in the so-called "socialistic camp" in the 1990s. The article by P. Bernhardt analyzes the experience of introducing nation branding management in Hungary, the Czech Republic and Slovakia to stimulate the inbound tourism (Bernhardt, 2012). H. Horakova explored the problems of post-communist tourism transformation in the agrarian regions of the Czech Republic, in particular targeting them to tourists from economically developed Germany (Horáková, 2010). L. Mura and A. Kljucnikov analyzed small businesses in rural tourism and agro tourism in Slovakia (Mura & Kljucnikov, 2018). The experience of rural tourism development is important for Ukraine, given that its urbanization level (about 70% of the population live in cities) is lower than in most European countries. Rural areas make a large part of the state's territory, especially in the western regions of the country bordering the countries of the European Union, and rural tourism is recognized as one of the priorities of the tourism industry.

The articles that contain comparative analysis of the development of tourism in Ukraine and its neighboring countries (Slovakia, Hungary, Poland, etc.), as well as more general articles on the prospects of European integration of the tourism industry in Ukraine (Korol et al., 2007; Korol & Skutar, 2018; Tkachenko, 2011; Zayachkovska, 2017) are of the great interest. These publications identify common problems and differences in the development of tourism in Ukraine and its neighbors with the European Union.

Many generalizing publications devoted to various aspects of the development of inbound tourism in certain countries, regions, cities of the world appear every year. In recent years, articles have appeared about inbound tourism in Indonesia (Mariyono, 2017), Cyprus (Adamos & Sofronis, 2009), India (Chukiat & Prasert, 2017), Tunisia (Bouzahzah, 2013), Croatia (Merver & Payne, 2007). In these publications the factors that form a flow of inbound tourism and determine its geographic structure are analyzed in particular: the GDP of the countries from which tourists travel and recipient countries (per capita), the volume of export-import between countries, the distance to the capitals, the dynamics of the local currency rate, migration flows between states, the population and some others.

The theoretical aspects and the certain examples of the influence of postcolonial past on inbound tourism are also analyzed in detail in the scientific literature. The monograph "Tourism and Postcolonialism Contested discourses, identities and representations" edited by C. M. Hall and H. Tucker is particular important here (Hall & Tucker, 2004). In the articles of the monograph, the most attention is paid to the development of tourism in the post-colonial countries of America, Africa, and Asia, in particular, in Malaysia, Kenya, and Singapore. However, interesting theoretical conclusions and examples regarding the influence of this factor on the current development of inbound tourism have interesting parallels with Ukraine. In particular, it concerns cultural tourism in post-colonial countries, colonial heritage, as well as more general issues of globalization and neo-colonialism. In general, the issue of the interconnection of post-colonialism and tourism in the countries that arose after the collapse of the USSR is still insufficiently investigated.

A lot of publications on inbound tourism in Ukraine, in particular, on the static and geographic structure of tourists, are in the Ukrainian-language scientific literature. New articles appear every year. Among the interesting publications of recent years we highlight an article by Parfynenko A. devoted to the

geopolitical aspects of the modern development of the foreign tourism in Ukraine (Parfinenko, 2015), and an article devoted to the analysis of the market for inbound and outbound tourism, carried out by Pismennyi O. (Pismennyi, 2014).

Given the numerous statistical base of research, many statistical and mathematical models of the development of inbound tourism have been proposed by scientists, on examples of individual countries and regions, in the context of its determinants and influence on national economies. In particular, such models are developed for India, South Africa, Turkey, the United States, and other countries (Chaiboonsri & Chaitip, 2012; Chaiboonsri & Chaitip, 2014; Vietze, 2008; Saayman & Saayman, 2008; Saayman & Saayman, 2005). However, it should be noted that in the case of Ukraine, the simulation of inbound tourism development is complicated by the instability of the political situation (especially as a result of the events in 2014), frequent changes in macroeconomic indicators and imperfect of tourism statistics.

To analyze the development of the tourism industry, including various types of tourism (inbound, outbound, domestic), the important question is their study in the context of the wider issue of economic growth in countries and regions, the general theories of economic development. There are a lot of generalizations on this subject, as well as studies on the example of individual countries (Harrison D. 2015, Adamou A. & Cleridesb S., 2009; Bouzahzah, M. & Y. El Menyari, 2013).

We also have a lot of publications about political instability in the country as one of the leading factors in the development of tourism. In particular, in 2015, the publication "The Travel and Tourism Competitiveness Report", carried out within the framework of the World Economic Forum, analyzed separately the impact of political instability on tourism in the period of 2000–2013 in Ukraine, Malaysia, Thailand, Egypt, Syria (Haddad et al., 2015).

Two monographs edited by Butler R. and Suntilkul W. (Butler & Suntilkul, 2011; Butler & Suntilkul, 2013), articles on the impact of political instability in Turkey and Thailand (Feridun, 2011; Ingram et al., 2013), generalizations on the features of the restoration of tourism after crises (Scott et al., 2008) are devoted to the impact of political instability, terrorism, hostilities on tourism in the twenty-first century.

Illegal annexation of Crimea by Russia and the military conflict in eastern Ukraine have had a significant impact on tourism not only in Ukraine but throughout Europe. In October 2014, the European Travel Commission published a separate report analyzing the impact of the Crimea Crisis on European Tourism (European Travel Commission, 2014). Based on statistical materials and a survey conducted among respondents from the EU countries, Russia and other countries of the former USSR, C. Ştefan analyzed the impact of geopolitical events on tourism in the Crimea in the eyes of respondents from different national traditions (Stefan, 2015). The influence of political instability in Ukraine on tourism development after 2014 was explored by other authors (Ivanov et al., 2016; Ivanov et al., 2017; Webster et al., 2017).

Data and Methodology. Two research hypotheses have been formulated to reveal the research objectives. The essence of the first of them was that the flows of inbound tourists in Ukraine are influenced by the incompleteness of political transit, according to the tourism transition model, developed by D. Hall. In formulating this hypothesis, we proceeded from general conclusions about the influence of political transit not only on the tourism industry but on the entire Ukrainian economy, in particular, in the context of the concept of sustainable development (Pantyley et al., 2017). The second hypothesis is the complexity of the development of the tourism industry, due to the state of political transit, is complemented by the influence of the colonial past of Ukraine on it. In particular, it is reflected in the depths of the economic and political crises that took place in the country, in the period after independence had been proclaimed in 1991. According to these research hypotheses, the task is to clarify the parameters of the influence of political transit, the colonial past and crises on inbound tourism in Ukraine.

The research is based primarily on the methods of quantitative analysis. The results are based on the data on the dynamics of international tourist arrivals in Ukraine for the period of 1997–2017, as well as the distribution of tourist arrivals by the country for the period of 2006–2018. Such a timeframe has been established due to the availability of reliable statistics on inbound tourism in Ukraine. In addition, a number of other indicators of tourist statistics were used, in particular – the statistics of accommodation establishments in Ukraine about the number of foreign tourists they serve. Given the geographical structure of international tourist arrivals in Ukraine, data on the dynamics of inbound tourism in the neighboring states of Ukraine have been used, which are mostly taken from UNWTO and national statistical offices reports.

Statistical information on inbound tourism in Ukraine was obtained from the following sources: State Border Guard Service of Ukraine, State Statistics

Service of Ukraine, UNWTO reports. In some cases, information from these sources was supplemented by materials from the World Travel and Tourism Council (WTTC), the World Bank, data from other international and European statistical and tourist organizations. On the basis of available information, various statistical methods used to achieve the research objectives: grouping; graphic method; analysis of absolute, relative and average values. In addition, to statistics on tourist arrivals, secondary sources have also been widely used – works by researchers in tourism and related sciences. In the process of analyzing literary sources, an interdisciplinary approach was used. The normative legal documents regulating the procedure of crossing the state border of Ukraine were also analyzed; materials of sociological surveys were involved.

For the analysis of the geographical origin and spatial distribution of tourists so-called the geographic concentration index is additionally used, which is calculated by the formula (1):

$$G=100\times\sqrt{\sum_{i=1}^{n}\left(\frac{x_i}{T}\right)^2} \quad (1)$$

$$G_0=100\times\sqrt{\frac{1}{n}} \quad (2)$$

In this formula, G is the geographic concentration index; Xi – the number of tourists from a particular country; T – the total number of tourist arrivals in the country; n – the number of countries selected for analysis. This index is usually compared with the G_0 – index of the most stable geographical concentration (2). If the value of G is less or close to G_0, then the geographical distribution of tourists is close to optimal, favorable for the development of inbound tourism and the general tourism industry of the state. If G is significantly larger than G_0 – it is negative for inbound tourism, because it depends on tourist arrivals from a small number of countries (Yaofeng M. et al, 2001). The development of the tourism industry may be accompanied by negative phenomena typical for the monopolized market. This index is a modification of the Herfindahl-Hirschman Index, a well-known in the economy (the Herfindahl-Hirschman Index or HHI), an indicator used to analyze the degree of monopolization of a particular industry.

Presentation of the main material. Since the beginning of the XXI century, after the long economic crisis of the 1990s, which has affected the tourism sector, the number of international tourist arrivals has started to increase rapidly in Ukraine – at least 1–2 million people annually. According to the UNWTO, between 2001 and 2008, this figure has increased by four times – from 6.4 to 25.4 million. Further, due to the economic crisis of 2009, the number of tourists decreased by 20% and then began to recover gradually. In 2014, in comparison with the previous year, the number of international tourist arrivals decreased almost twice by political and economic reasons (Fig. 1).

It is interesting to compare the dynamics of tourist flows in Ukraine with those neighboring countries, Russia, Poland, Hungary, which are the main competitors of Ukraine in the international tourism market and in which the method of recording the number of inbound tourists is the same. The Fig. 1 shows that three of the four countries listed above (except Hungary) were affected by the economic crisis of 2008–2009. However, the fall in the number of foreign tourist arrivals in Ukraine was the most significant. In general, the development of inbound

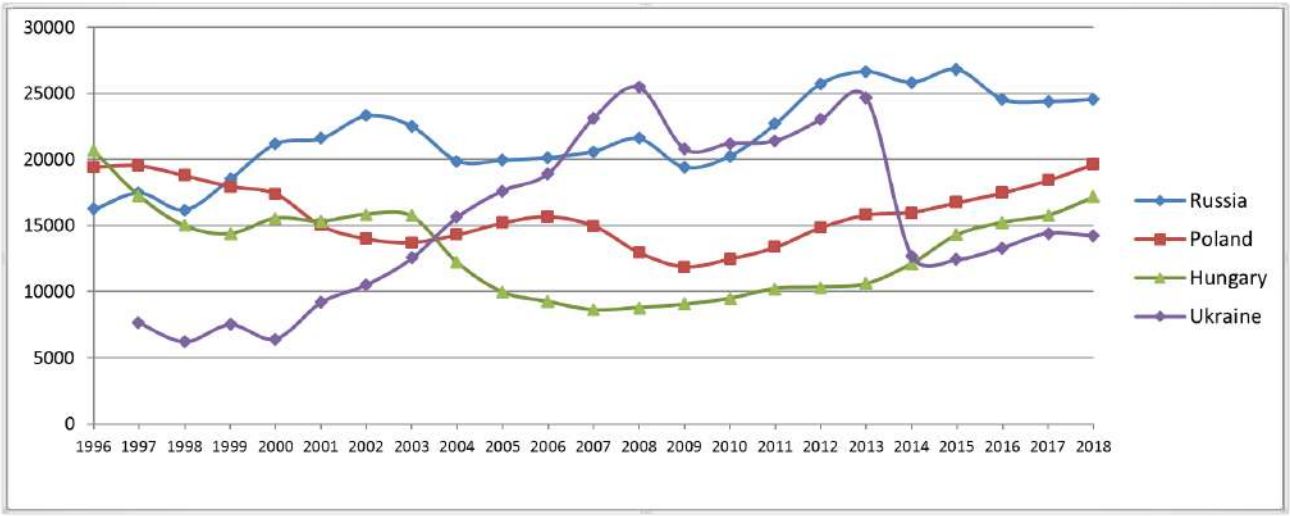

Fig. 1. Dynamics of the number of tourist arrivals in Russia, Poland, Hungary, Ukraine in 1996–2018, based on the data of national statistical services, thousand persons
Source: Ukrstat, 2019; UNWTO.

tourism in 1996–2018 in the transition countries of democracy in Poland and Hungary was more balanced than in Ukraine, the country where the transitional (transit) regime has been preserved, and Russia, where the authoritarian regime prevails.

The analysis of statistical information and literature sources makes it possible to distinguish several periods in the development of inbound tourism in Ukraine, to characterize them, as well as to point out the most important political and economic events that have affected the tourism industry (Table 1).

Comparison of the dynamics of tourist arrivals to Ukraine, incomes from incoming tourism and the indicator of gross domestic product since 2005 (since the year when the most reliable data of tourist statistics are available) reveals the dependence: economic growth leads to a rapid increase in the number of tourist arrivals and incomes, economic crises and decline – immediately sharply negatively reflected in indicators of development of inbound tourism.

During the periods of economic growth, the increase in the number of foreign tourists and incomes from inbound tourism in Ukraine were almost constantly higher than GDP growth (Fig. 2). The decline in inbound tourism in the period of economic crises was also more significant than the decline of GDP. In the period of economic growth in 2005–2008, the increase in the number of foreign tourists in some years even exceeded 20%, and the increase in incomes from inbound tourism – 30%. Instead, GDP growth usually did not exceed 10%, only in 2004, this figure rose to 11.8%. However, the decline in inbound tourism in the period of economic crises was also more significant than the decline of GDP. In the crisis of 2009, Ukraine's GDP dropped by 15.1%, while the number of international tourist arrivals – by 18.3%, incomes from inbound tourism – by 38%. In the period of the crisis in 2014–2015, GDP firstly dropped by 6.6% in 2014, and then additionally dropped by 9.8% in 2015. The decrease in the number of foreign tourists only in 2014 was 48.8%, incomes from inbound tourism decreased by 68.3%. It should be noted that the rapid decrease in tourism income during the period of economic crises should be explained not only by the physical decrease in the number of tourists but also by the devaluation of the local currency (for example, the hryvnia/dollar exchange rate in the period of the crisis in

Table 1. Political and economic changes in Ukraine and the state of tourism development in 1991–2018

Years	*Political and economic changes*	*The state of tourism development and the most important events for the tourist industry*
1991–1999	The economic crisis in Ukraine and other countries of the former USSR	The decline of the economy in general and tourism in particular. Destruction of tourist flows, formed during the Soviet Union. The poverty of the population as a factor hindering the development of tourism in the post-Soviet space. Collapse of the Soviet model of social tourism.
2000 –2004	Quite fast economic growth in Ukraine	Intensive growth of foreign tourists. Restoration of tourist flows from the countries that arose after the collapse of the USSR (Russia, Belarus, Moldova, etc.). Formation of flows of inbound tourism from European countries on the western border of Ukraine (Poland, Hungary, Slovakia, Romania).
The end of 2004 – 2008	Continuation of economic growth. "Orange Revolution" in Ukraine.	Ukraine's interest in the European Union states. Pro-European Policy of the President V. Yushchenko. Cancellation of entry visas for tourists from EU countries. The growth of the number of tourists from Western Europe. The maximum number of foreign tourists during the entire period of independence.
The end of 2008 – 2009	Economic crisis in the world and in Ukraine	The crisis of the tourism industry. Reduction of the number of foreign tourists by almost 20%. Changes in the geographical structure of foreign tourists. The decrease in the number of tourists from Poland, the second country after Russia in the structure of the tourist flow, by 50%.
2010 –2013	Economic stagnation in Ukraine	Slow recovery of indicators of inbound tourism. The pro-Russian course of V. Yanukovych. The growth of the number of tourists from Russia, Belarus, Moldova, other countries that arose after the collapse of the USSR. The deterioration of the indicators of inbound tourism from the European Union. Football tournament of EURO–2012 (in cooperation with Poland).
2014 –2015	Political and economic crisis in Ukraine	The crisis in the tourism industry, reducing the number of foreign tourists by almost 50%. Political conflict in the East as a negative factor in the safety of tourists. Reducing the number of tourists from Russia by 90%. Reducing the number of tourists from Western European countries by 50%.
2016 – the present time	Economic recovery	Slow increase in the number of foreign tourists. Association Agreement with the European Union. Agreement on a visa-free regime between Ukraine and the European Union. Gradual increase in the number of foreign tourists from EU countries.

Source: own compilation

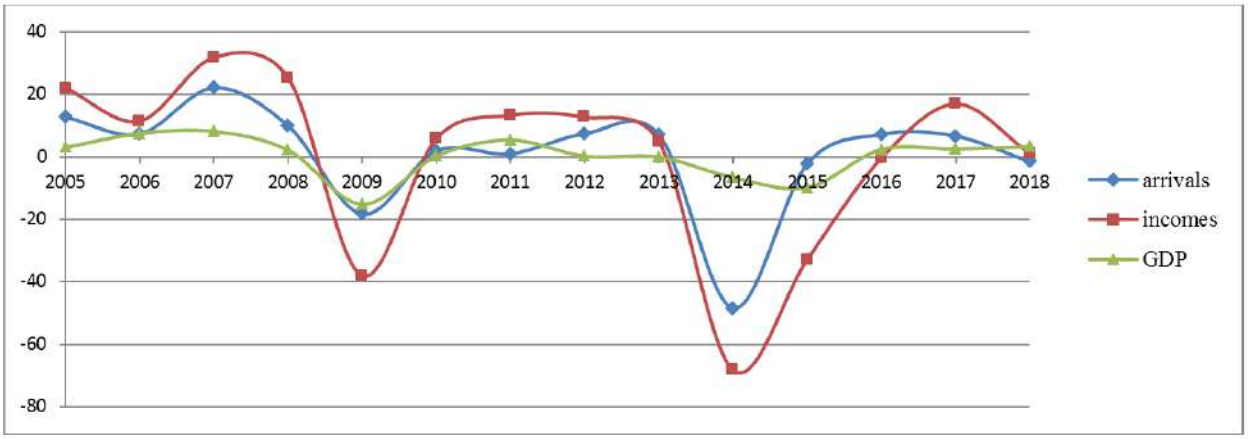

Fig. 2. Dynamics of tourist arrivals, incomes from inbound tourism and gross domestic product in Ukraine in 2005–2018, as a percentage of the previous year. *Source: Ukrstat, 2019; Worldbank, 2018.*

2014–2015 has decreased by three times), and also by the increase in the share of the shadow sector in the tourism industry.

Analysis of flows of inbound tourism in Ukraine will be more meaningful if we add data on the distribution of international tourist arrivals by countries from which foreign tourists come (Table 2). The State Statistics Service of Ukraine provides an opportunity to analyze them in detail starting from 2006. By providing an information on the arrival of foreigners, it allocates more than 140 countries and territories. To analyze, we select 20 of the leading countries, in which the number of tourists in 2018 exceeded 40 thousand.

In the period from 2006 to 2017, the index of the geographical concentration of inbound tourism in Ukraine, calculated for 20 countries, was always higher almost than 40, while the optimal for such a number of countries would be 33.75 (Fig. 3). That is, according to the geographical structure of tourist

Table 2. Tourist arrivals to Ukraine in 2006–2018, thousand persons

Country	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total	*18 936*	*23 122*	*25 449*	*20 798*	*21 203*	*21 415*	*23 013*	*24 671*	*12 712*	*12 428*	*13 333*	*14 230*	*14 207*
Moldova	3 056	3 999	4 419	4 339	4 063	4 072	4 849	5 418	4 368	4 394	4 296	4 436	4 437
Belarus	2 127	2 919	3 407	2 985	3 058	2 644	3 092	3 354	1 593	1 892	1 822	2 728	2 667
Russian Federation	6 429	7 258	7 638	6 964	7 900	9 018	9 527	10 285	2 363	1 231	1 474	1 465	1 539
Poland	3 979	4 430	5 243	2 546	2 090	1 720	1 404	1 259	1 124	1 156	1 195	1 144	1 097
Hungary	1 160	1 252	1 033	815	945	862	742	771	874	1 070	1 270	1 119	915
Romania	349	1 010	1 440	1 077	910	735	791	877	585	763	775	791	740
Israel	53	59	90	68	82	120	107	121	102	149	217	261	318
Slovakia	506	665	645	538	610	564	477	424	416	413	411	366	314
Turkey	62	80	79	60	66	76	117	152	116	141	200	271	279
Germany	215	235	232	214	228	232	274	253	131	154	171	209	238
USA	114	132	128	123	126	128	134	135	82	108	138	154	184
United Kingdom	57	66	69	67	65	67	81	81	44	55	70	79	116
Italy	63	77	71	74	79	87	89	91	55	63	78	85	98
Azerbaijan	60	71	80	67	77	85	101	112	69	76	106	96	94
Lithuania	47	53	57	48	49	49	55	83	29	35	52	76	93
Czech Republic	46	50	44	47	46	52	52	53	35	39	49	68	79
France	43	48	50	50	56	62	65	65	40	46	54	61	67
Bulgaria	16	17	25	25	27	32	46	56	37	32	38	42	51
Georgia	40	50	54	41	36	36	41	52	35	38	48	49	48
Kazakhstan	36	55	49	44	51	62	71	85	30	27	37	41	47

Source: own processing based on: data for 2006-2017 – State Statistics Service of Ukraine (Ukrstat, 2019), 2018 data – Ministry for Development of Economy, Trade and Agriculture (Ministry, 2020).

arrivals, the market of inbound tourism in Ukraine is not sufficiently diversified, which poses a threat to its stability. Actually this partly explains the "collapse" drop in the number of foreign tourists in Ukraine in 2009 and 2014.

All foreign tourists are divided into three groups (by a complex of factors influencing the formation of tourist flows): countries – neighbors having a common land border with Ukraine, former Soviet republics, members of the Commonwealth of Independent States (Russia, Belarus, Moldova); Western neighbors of Ukraine – members of the European Union (Poland, Slovakia, Hungary, Romania); other countries. From half to three-quarters of tourist arrivals to Ukraine were stable provided by the tourists from the Commonwealth of Independent States countries bordering Ukraine (Table 3). The share of arrivals from neighboring countries that are members of the European Union reached maximum one third. The share of arrivals from other countries for a long period did not exceed 10%, although gradually increasing since 2008.

international relations between these two states. As a result of the illegal annexation of the Crimea and the support of separatist armed groups in Eastern Ukraine, the Verkhovna Rada of Ukraine officially recognized Russia as an aggressor state. A number of the state border crossing points between Ukraine and Russia have been closed; the number of railway and bus routes between two countries has decreased significantly, since October 25, 2015, air services have completely stopped. Although "de facto" the visa regime with Russia has not come into a force, crossing the Ukrainian border for Russian citizens is substantially complicated. Since March 2015, the entry of Russians is carried out only with foreign passports (earlier it was allowed to enter with domestic Russian passports), complicated requirements for the entry of men aged 16–60 years, the requirement for a mandatory invitation for most categories of Russians who want to visit Ukraine is applied. From January 1, 2018, Russia is included in the list of "migration risk" countries. Its citizens who wish to arrive on the territory of Ukraine must provide a biometric

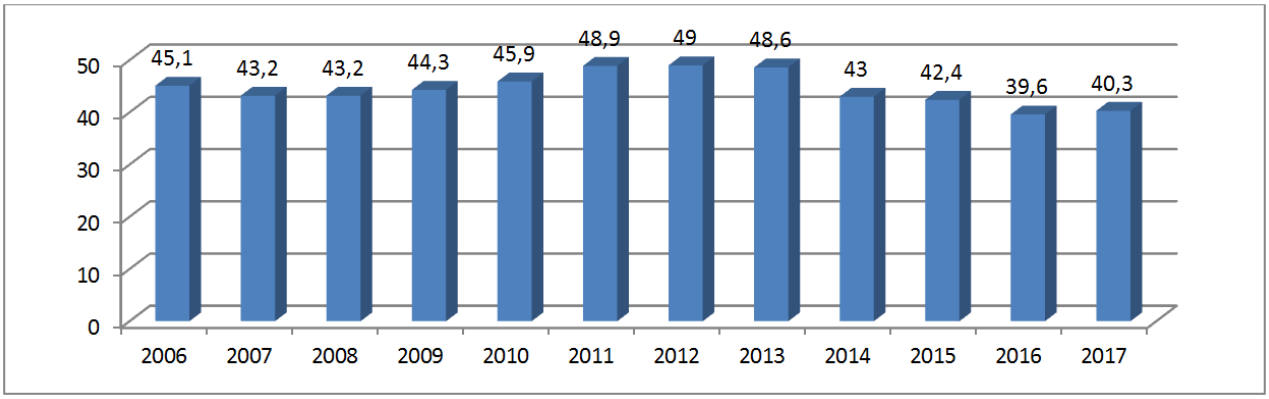

Fig. 3. Index of geographical concentration of inbound tourism in Ukraine (2006–2017).

In general, tourists from countries with a common land border with Ukraine (EU members and CIS together) until 2014 accounted for more than 90% of the total flow of inbound tourism, and only in recent years, their share has decreased (to 85% in 2017). First of all, the reason is the decrease in the number of tourists from Russia. In 2013, 10.3 million tourist arrivals to Ukraine were from this country, in 2014 – only 2.4 million, which is less by 77%. In 2015, their number has decreased again by a half and just within two years (2014–2015) since the beginning of the political conflict with Russia – by 8.4 times. The share of Russians in the total number of tourist arrivals decreased from 41% (maximum in 2011) to 10% in 2017.

The main reason for reducing the number of tourists from Russia has been radical changes in passport; the procedure of their biometric control is introduced. They must register in advance and provide the Ministry of Foreign Affairs of Ukraine with the necessary information about themselves. In addition, they are required to undergo registration at their place of stay, in particular, to provide the authorities with information on their movements in the territory of Ukraine.

The fact that Ukraine lost control over Crimea and the part of Donetsk and Luhansk regions also contributed to a decrease in the number of tourists from Russia. Russians traditionally constituted the largest share of foreign tourists in the Crimea. Among the 6 million tourists visiting the peninsula, in 2013, the last before the annexation, 65.6% were Ukrainian citizens, 26.1 (that is, about 1.5 million people) – citizens of Russia, 4% – citizens of Belarus

Table 3. Distribution of tourist arrivals to Ukraine in 2006–2018, by groups of countries, %

Group	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
group I	61.33	61.31	60.76	68.7	70.85	73.47	75.9	77.24	65.49	60.48	56.94	60.63	60.83
group II	31.66	31.82	32.86	23.92	21.48	18.13	14.84	13.5	23.59	27.37	27.37	24.04	21.63
group II	7.01	6.87	6.38	7.38	7.67	8.40	9.26	9.26	10.92	12.15	15.69	15.33	17.54

Source: calculated based on materials from the State Statistics Service of Ukraine (Ukrstat, 2019) and Ministry for Development of Economy, Trade and Agriculture (Ministry, 2020).

(Information, 2014). In the Donbas, Russian citizens also traditionally accounted for the largest share among the representatives of all leading types of inbound tourism (business tourism, trips to relatives and acquaintances, cultural and cognitive tours).

The atmosphere of hostility between countries that has been established in society has greatly affected the tourist flows between Ukraine and Russia. According to one recent poll of Russian citizens which was held by well-known Russian non-state research organization Levada-Center in January 2020, 47% of Russians treated Ukraine "badly" (first place, even the US has better indicator – 46%) (Levada-Center, 2020).

As a result of the political and economic crisis in 2014, the number of tourist arrivals from Belarus, another post-Soviet neighbor of Ukraine in the north, declined by a half. As it is known, the authorities of this state have been holding pro-Russian policy for many years. Sociological researches in 2014, when the illegal annexation took place, showed that the majority of Belarusian citizens in the Ukrainian-Russian conflict took a pro-Russian position. In particular, a survey of Belarusian sociologists in September 2014 showed that almost 60% of Belarusians supported the annexation of Crimea (Lavnykevych, 2014). Traditionally, since the period of existence of the USSR, many Belarusians went to rest in Crimea, other coastal regions of Ukraine, as well as in pre-Carpathian resorts (Truskavets, Morshyn). The share of Belarusian tourists in the overall tourist flow constantly has exceeded by 10%. During 2014–2016, tourist arrivals from Belarus were significantly lower than in the pre-crisis period of 2013. However, in 2017, this figure has increased immediately by 50%, while the share of Belarus has risen to 19.2%.

One of the leading countries of inbound tourism in Ukraine has always been Moldova. It has a specific geographic location – borders only with Ukraine and Romania. The nearest sea coast for the population of Moldova is the Ukrainian coast of the Black Sea, the nearest metropolis with a population of more than 1 million people – the Ukrainian tourist city Odessa. More than 400 thousand ethnic Ukrainians live in Moldova (along with the self-proclaimed Transnistrian Republic of Moldova – TMR. They are the second largest group after Moldavian. In 2015, in the self-proclaimed TMR (tourists from which Ukrainian statistics also include tourists from Moldova), Ukrainians made 22.9%. Many of them have Ukrainian citizenship. All this contributes to tourist flows from Moldova to Ukraine.

The impact of the political crisis on tourist flows from Moldova to Ukraine in 2014 was smaller compared to Russia and Belarus. In the last four years, the largest number of tourist arrivals in Ukraine (more than 30%) was from this country. Over the past 10 years, the number of tourists from Moldova to Ukraine has steadily increased by more than 4 million people annually (maximum 5.4 million in 2013), while the entire population of this state is also 4 million. The complicated configuration of the border between the states, and residence on the Ukrainian-Moldovan border ethnic minorities – Gagauz and Bulgarians, who resettled here in the end of the eighteenth century, also contribute to the frequent crossing of the border between Moldova and Ukraine.

Among the neighboring countries of Ukraine (Poland, Slovakia, Hungary, Romania), Poland is distinguished by the dynamics of the tourist flow. It was the second state in terms of the number of foreign arrivals in Ukraine until 2008. Its share was 20%, and the maximal number of tourists amounted at 5.2 million (in 2008). In 2009, as a result of the economic crisis, the number of arrivals from Poland decreased by a half – up to 2.5 million, i.e. 51.4%. So, the number of arrivals of foreign tourists to Ukraine decreased by 18.3% (by 4.6 million) in 2009, more than by a half was only due to one Poland. In the following years, the flow of tourists from Poland has not recovered to the level of 2008, and vice versa – the tendency towards its decline was manifest until 2014.

In the last decade, the tourist flow to Ukraine from Slovakia has also decreased. The maximal number of tourist arrivals from this country registered in 2007 was 664.6 thousand people, and this figure decreased to 366.2 thousand people (by 45%) by 2017. However, the decrease in the number of tourists from Slovakia was more smoothly than from Poland. In addition, in 2009, the year of the economic crisis, there was no

such a sharp drop in the number of Slovak tourists, compared to Poland.

The indicators of tourist arrivals from Hungary and Romania over the past decade have had somewhat different dynamics. The number of tourists from Hungary, after the peak of 2007, continued to decrease for five years until 2012 and then began to grow rapidly. Even in 2014, despite the political and economic crisis in Ukraine, tourist arrivals from Hungary were by 13% more than in the previous year. The tourist flow from Romania after a decrease from 1 440 thousand in 2008 to 1 077 thousand in 2009 (by 25%) in subsequent years stabilized at the level of 700–800 thousand people, except for 2014, when it decreased to 585 thousand.

In general, the share of tourists from five countries – neighbors of Ukraine, members of the EU, in the overall tourist flow reached the maximum – 32.9% in 2008, but by 2013 it decreased to 13.5%. After the political crisis in 2014, this figure rose to 24% in 2017. But it wasn't due to a significant increase in the number of tourist arrivals, but in connection with a decrease in the number of tourists from Russia.

Some features of the tourist flow at the beginning of the 21st century from western countries – neighbors of Ukraine need some explanation. The fact is that in the western border regions of Ukraine in 2001 when the last census took place, about 156 thousand Hungarians (in the Transcarpathian region) and 150 thousand Romanians (in the Chernivtsi and Transcarpathian regions) lived compactly (Census, 2001). The socio-cultural and family-household connections between Hungarians and Romanians on both sides of the border are explained by the constantly high rates of tourist arrivals from Hungary and Romania to Ukraine.

A slightly different situation has been observed with the tourist trips of Poles to Ukraine. More than 2 million Poles lived in the territory of Ukraine, within its modern borders, mainly in the western part until 1939. Most of them were resettled to Poland in 1944–1947. In the 1990s and the early 2000s, a significant part of Polish tourists in Ukraine is the citizens of pre-war Poland, born in Ukraine, and their descendants in the first generation. They were representatives of the so-called "nostalgic" tourism, who sought to visit their places of childhood or places of birth of their parents. Their number constantly decreases because 70 years have passed since the time of eviction. Moreover, they mostly cannot travel because of age.

The decrease in tourist arrivals from Poland is partly due to the gradual deterioration of the attitude of the Poles towards Ukrainians and Ukraine in recent years, which takes place against the background of disputes over a number of historical events of the twentieth century, which are treated differently in Ukraine and Poland. According to a survey conducted in Poland in 2018 by the Center for Public Opinion Research (CBOS) in the last 10 years, the worst attitude of Poles is to Ukrainians. According to a survey conducted in Poland in 2018 by the Center for Public Opinion Research (CBOS), today the Poles' attitude towards Ukrainians is the worst. Only one in four of them (24%) have a positive attitude towards Ukrainians, while 40% of respondents feel antipathy (Omyła-Rudzka M., 2018).

In the first decade of the 20th century, when the welfare of the Poles, Slovaks, Hungarians, and Romanians was still rather low, an important reason for mass tourism trips to Ukraine was the low cost of such travels. However, after joining the European Union of Poland and other countries – western neighbors of Ukraine, the average income level of their population has increased significantly. Accordingly, residents of these countries often choose more expensive trips to the wealthier countries, or to exotic regions. Their tourist tastes are changing. They choose niche tourism to replace mass tourism. This leads to a decrease in the number of tourists who visit Ukraine, which cannot yet offer quite enough interesting original tourism products. However, on the other hand, intense business ties, cultural similarity, and the presence of a significant proportion of the population of Ukrainian ethnic origin contribute to the tourism flow from western neighboring countries to Ukraine.

Among the countries which don't have a common border with Ukraine, there are countries with a quite large number of tourist arrivals: countries that appeared after the Soviet Union (Kazakhstan, the Baltic States, the South Caucasus, Central Asia), the leading economic countries of Europe (Germany, Great Britain, France), and the USA, Turkey, Israel. The support of the tourist flow from these countries is most favored by the following factors: geographical location, the presence of Diasporas, close economic ties with Ukraine, etc.

Results and discussion. The analysis of the flows of the inbound tourism in Ukraine gives an opportunity to establish the present stage of the development of the tourism industry in the state and the direction of its development. The tourism industry has not yet passed the transit stage and the Ukrainian economy as a whole. The dynamics of tourist arrivals, incomes from inbound tourism and its geographical structure indicate the incompleteness of tourist transit in Ukraine.

Economic and political crises have a stronger impact on the number of international tourist arrivals in Ukraine than in the countries that have passed the transit stage. An important reason for this phenomenon is a large proportion of tourists oriented towards a massive low-cost tourist product. With the beginning of the economic crisis, such tourists generally refuse to travel.

Income from the inbound tourism (total and per one arrival) is rather low, much lower than even in Poland or Slovakia, and much lower than in the developed countries of the European Union. In 2018, one international tourist arrival in Ukraine officially gave only 101.7 USD, while, for example, in Austria – 745.7 USD (UNWTO, 2019). The reason for this is, first of all, that mass tourism is dominant in Ukraine, like twenty years ago (cultural tourism, seaside holidays, trips to friends and relatives), oriented towards groups of consumers with relatively low incomes, mostly from neighboring states, historically and culturally related to Ukraine. The segment of niche tourism is poorly developed in Ukraine, modern tourism types are almost not developed, for example, tourism of special interests. In general, there is a small proportion of citizens from the developed countries of Europe and the USA in the geographical structure of foreign tourists, and the number of tourists from such powerful "suppliers" of tourists like China and Japan is generally statistically insignificant (less than 0.1% from each country).

The insufficient level of the development of the branches of economy related to tourism is still evidenced by the incompleteness of tourist transit, which negatively affects the quality of a national tourist product, does not allow diversifying it properly. First of all, it concerns air transport. Until recently, only one well-known European low-cost airline – Wizzair – has worked in Ukraine. Others began to come to the Ukrainian air transport market only in the last two years. Moreover, the reason for this was not only the low solvency of Ukrainians but also the corruption protection that the Ukrainian authorities made to the local airlines. There is still an insufficient level of development of the hotel sphere in most regions of Ukraine, and low quality of hotel services. The number of niche tourism products is very small.

The incompleteness of political transit is also evidenced by the difficulties in obtaining reliable statistics on tourism in Ukraine. The difficulties of statistical accounting are largely due to the imperfection of methods used by state statistical agencies. But the main reason is the massive concealment of information about the number of tourists served, and the profit received by travel agencies, accommodation establishments for tourists, transport companies and excursion bureau. That is why, for example, tourism income statistics submitted to the UNWTO greatly understates the economic effect of inbound tourism in Ukraine.

The analysis of inbound tourism flows in Ukraine, in general, confirms already known types of reactions of tourists from different countries to economic and political crises. In particular, the economic crisis of 2008–2009 gave the following results:

the flow of tourists from the countries of the western neighbors of Ukraine (Poland, Hungary, Romania, Slovakia) and other countries located relatively close to Ukraine (Turkey, Georgia, Latvia, Lithuania, Estonia, Azerbaijan) decreased most of all. The basis of the tourist flow was the population with low income. The reduction in the number of tourists was 15–25%, and in the case of Poland – 50%. A sharp drop in the exchange rate of the national currencies in many of these countries, especially Polish zloty in 2009, contributed to the reduction of the number of tourists.

the number of tourists from neighboring countries of Ukraine, which were previously the part of the USSR (Belarus, Russia, Moldova), decreased relatively less (2–15%). Visitors to the border areas were the basis of visitors from these countries. In addition, trips to relatives and friends were widespread, without the use of hotels and other accommodation for which they had to pay. Such tourists had more opportunities to minimize travel expenses. In addition, some types of travel, for example, related to border trade, due to the difference in prices between the goods of everyday demand, could even be intensified during the crisis period.

The number of tourists from developed countries of Europe declined relatively insignificantly, and from some countries – there was an increase in their number. Due to high incomes, tourists from Western Europe were less sensitive to the economic crisis. A sharp decline in the rate of the national currency (UAH, hryvnia) even made Ukraine attractive, very cheap for tourism. Accordingly, a part of tourists from these countries during the crisis could choose Ukraine as an alternative country of inexpensive tourism. Therefore, during the economic crisis, the number of tourists from countries such as the USA, Great Britain, France, Sweden, and Switzerland has reduced to 5%, Germany – by 8%, while the number of tourists from Italy, Canada, Norway, the Netherlands, the Czech Republic, Denmark, and Belgium has increased. It should also be taken into account that the economic

crisis in transition countries began with a delay. In Ukraine, its peak was in 2009, in more developed countries – in 2008. It also affected the flows of inbound tourism.

During the next one-two years there was a rapid recovery of the number of tourist arrivals from most countries to the level of 2008. Exceptions were the states bordering Ukraine which are the members of the European Union – Poland, Hungary, Slovakia, and Romania. In subsequent years after the crisis of 2008–2009, the number of tourists from these countries continued to decline, or the recovery of the tourist flow was slow. First of all, it was influenced by internal factors that are typical for these countries.

The dynamics of inbound tourism also traces the impact of the local economic crises which have occurred in certain countries and regions. An example might be the financial crisis of 2011 in Belarus which resulted in the exchange rate of the Belarusian currency devaluated in relation to the dollar by three times. This year, the number of tourists from Belarus to Ukraine has decreased by 14%, or by 414 thousand people.

The reaction of tourists from different countries to the 2014 political crisis in Ukraine has had a significant difference compared to the reaction to the economic crisis in 2008–2009:

- The number of tourists from Russia, as a party to the conflict, has decreased most of all: almost by 10 times in two years, 2014 and 2015. The number of tourist arrivals from countries politically related to Russia (Belarus, Kazakhstan, Armenia), as well as from other post-Soviet countries, where the basis of tourists were representatives of the so-called Russian-speaking population, who mostly came to Ukraine to visit friends and relatives, or to rest in the Crimea and other Black Sea regions, has also decreased by 50% or more compared to 2013.

- The number of tourists from economically developed countries – Germany, the United States, Great Britain, France, Canada, also has decreased by 40–50%. The main reasons for this were fears for their own security and a reduction in the number of business trips, due to the economic crisis caused by the political conflict.

- The number of tourists from the bordering countries in the West – Poland, Slovakia, Romania, has decreased less significantly, and from Hungary even has increased. These countries are at a considerable distance directly from the conflict zone. Tourists traveled mainly to the western bordering regions of Ukraine, where the economic and political situation were the most stable. A significant proportion of the tourist flow from these countries is tripping due to socio-cultural and family-related ties, which are less vulnerable to the impact of political and economic factors.

In general, inbound tourism after the political and economic crisis of 2014 is restored much slower compared to the economic crisis of 2008. The reasons for this are understandable, as Ukraine has lost control over Crimea, one of the leading tourist regions of the state and a significant part of the industrial Donbas, which generated flows of business and border tourism. In addition, the military conflict in the East did not stop, which affects the safety of travel. However, it is not as destructive as in 2014–2015.

The dynamics of flows of inbound tourism also traced the impact of political crises and military conflicts that took place in other countries and regions. In particular, due to the Russian-Georgian war of 2008, the number of tourists from Georgia decreased by 25% this year. The "Arab Spring" in the Middle East, the difficult political and economic situation in some countries of Central Asia also reflected on the structure and dynamics of the flow of foreign tourists.

The most important factor in the formation of the flow of foreign tourists who come to Ukraine remains the historical – the entry of the territory of Ukraine into the USSR, and even earlier – the Russian Empire, that is its colonial (or semi-colonial) past. One of the most important results of the existence of empires is the mixing of people of different ethnic and racial origin, which was caused by economic reasons or occurred as a result of forced relocation. This process was especially intensive in the land empires, less limited distance, unlike the sea colonial states. With the collapse of these empires, numerous diasporas are formed, representatives of which, by their generations, maintain ties to their historic homeland. In addition, in the new states, there are numerous monuments of colonial cultural heritage.

On the eve of the collapse of the USSR, according to the results of the last Soviet 1989 census, more than 11.3 million Russians, more than 400 thousand Belarusians, 324 thousand Moldovans, 54 thousand Armenians, 36 thousand Azerbaijanis, and 23 thousand Georgians lived in Ukraine (Census, 1989). According to the results of the Ukrainian census of 2001, the representatives of these ethnic groups became less due to migration and assimilation. Nevertheless, it was millions, hundreds and tens of thousands of different ethnic group representatives (Census, 2001). Millions of tourist arrivals, which until 1991 belonged to domestic tourism, after the collapse of the USSR, went into the category of outbound

tourism. After all, family ties, cultural proximity of former so-called "Soviet people", the experience of tourist trips to the Black Sea, Ukrainian Carpathians or balneological resorts in Western Ukraine have been preserved. Numerous economic ties have been also partially preserved.

Another consequence of the colonial past is the Ukrainian Diaspora in the countries that appeared after the collapse of the USSR. In particular, in the late 1990s and the early 2000s, 2.9 million Ukrainians lived in Russia, 158 thousand lived in Belarus, 442 thousand lived in Moldova, and 547 thousand lived in Kazakhstan, and so on. The total Ukrainian Diaspora in different countries of the world amounted at more than 10 million people (Zubyk, 2019). Nowadays, numerous Ukrainian Diasporas are formed in the countries of Europe – in Italy, Spain, Portugal, Poland, Czech Republic, and other countries. That is why Diaspora tourism will remain one of the most important types of inbound tourism in Ukraine in the next decades.

What problems and risks for sustainable Ukrainian inbound tourism will be in the coming years? The biggest problem is the incompleteness of Ukraine's transition to a democratic society. In recent years, many steps have been taken to resolve it. In 2017, an agreement on the association of Ukraine with the EU entered into force. In addition to the economic component, it contains a lot of important commitments of Ukraine to complete the construction of a democratic, market-oriented state. In recent years, exports of goods and services to the EU countries have increased significantly. The European course is felt by the example of the tourism industry. In particular, in the last two years, the European world-famous low-cost airlines have appeared in the market of passenger air transportation: Ryanair, Up, Vueling Airlines, AegeanAir, AZAL jet, Pegasus Airlines, etc. The indicator of passenger air transportation grows dynamically, in recent years – by a quarter each year in average. At some of the major airports, such as Danylo Halytsky's International Airport "Lviv", International airport "Kyiv", passenger traffic grows by 50% annually. The arrival of low-cost airlines in the future should increase the number of tourist arrivals in Ukraine from the more distant countries of the world.

An important factor that negatively affects inbound tourism is an unfinished military conflict in the East of the country. In recent years, Ukraine has been constantly ranked the lowest places in the ranking of countries safety (Global Peace Index) – in 2018 – 152nd place, in 2017 – 154th, in 2016 – 156th (IEP, 2018).

Ukraine does not have a well-established, well-known tourist brand in the international tourist services market. There have been several attempts to create and promote it since the beginning of the twentieth century, but all of them have failed. Only some cities, including Lviv, the tourist capital of Ukraine, have successful experienced in tourism branding.

The tourism policy of the state is not very sufficient. Over the past two decades, the name and subordination of the central government body, responsible for tourism development, has been constantly changing. The tourism development strategy in Ukraine has had significant mistakes that other post-socialist countries have not missed too. In Ukraine, a certain period was an excessive hope for the development of rural tourism, which in general was not justified. The same mistake was made in Romania (Rabontu, I. & Vasilescu, M., 2012). For many years, it was not possible to establish an effective system of categorization of accommodation establishments.

Ukraine as a tourist country still does not have its clear position in the world tourist markets. It continues to offer massive cheap tourism for the border countries. There are a few quality niche tourism products. The tourist product of Ukraine in the prospective market of Southeast Asia is not sufficiently presented. Ukraine has very few tourists from China, Japan, and South Korea. For example, twice more tourists from these countries come to neighboring Poland than to Ukraine, despite the fact that Ukraine is geographically closer to the region of Southeast Asia (Turystyka, 2018). In general, in the development of the tourism industry, in particular, by the indicator of diversification of tourism product, it significantly loses neighboring Poland, Hungary, and Slovakia. The situation with the development of inbound tourism in Romania and Bulgaria is closer to Ukraine.

Probably, the number of international tourist arrivals in Ukraine will increase in the coming years, provided that the current trends of economic and political development of Ukraine, the absence of a world or macro-regional economic crisis are preserved. However, this increase will be mainly driven by the effect of low tourist development rates in 2014. In the future, in the absence of long-term qualitative changes in the tourism industry, and in general, the Ukrainian economy, this growth may cease. It is very important for the state in 2019 because the elections of the President of Ukraine and the composition of the Verkhovna Rada took place. The experience of the recent decades unequivocally confirms that such elections in the state are constantly associated with the risks of political and economic instability.

Conclusions. Ukraine is an important part of the global market for international tourism. The development of inbound tourism is facilitated by the advantageous geographical location at the intersection of various transport routes, as well as proximity to the main countries – suppliers of tourists, in particular, developed countries – members of the European Union. After a long decline in the 1990s, caused by the collapse of the USSR and the economic crisis, inbound tourism in Ukraine was actively developing until the time of the economic crisis of 2008–2009. After a short period of the recovery of the inbound tourism flow in 2010–2013, Russia's aggression in the Crimea in 2014 and the military conflict that began in the East of Ukraine halved the number of inbound tourists in Ukraine. Since 2016, the number of foreign tourists has been increasing again, but very slowly.

The leading role in the geographical structure of international tourist arrivals is played by the neighboring states of Ukraine with which it has a state border: Moldova, Belarus, Russia, Poland, Hungary, Romania, and Slovakia. Here is a list of countries with which Ukraine has close economic contacts, as well as cultural and historical ties, in particular, in which Ukrainians live: Israel, Turkey, Germany, and the United States. According to the geography of tourists, inbound tourism is not sufficiently diversified. The incompleteness of political transit affects the development of the tourism industry. The main suppliers of tourists are the neighboring states, as well as the countries of the former USSR, united with Ukraine by a common "Soviet" historical past. In addition to the geographical location, the low cost of a tourist product is an important factor in the development of international tourism, due to the cheap labor force involved in its creation, as well as the depreciation of the national currency – hryvnia (UAH). The tourist product of Ukraine is for the most part intended for mass tourism. There are a few suggestions for niche tourism. All these features of Ukrainian inbound tourism substantially increase its vulnerability to various types of economic and political crises.

In the context of signing the Association Agreement with the EU, the prospects for tourism development in Ukraine are primarily related to the decisive actions of the Ukrainian authorities towards economic and democratic reforms. It is necessary to complete the political transit, which other states of Central and Eastern Europe have already realized not so long ago, overcoming the consequences of the rule of authoritarian regimes. Other important components of tourism development are the settlement of the political conflict in the East, as well as the improvement of the tourism policy, the national branding of the tourism product, its diversification towards the creation of niche products, and the improvement of the quality of tourist services. It will attract more tourists from the EU, as well as a huge market of Southeast Asia, especially China and Japan. Without such changes, the Ukrainian market of inbound tourism will soon be stagnating. It will lose a traditional tourist from the neighboring countries located in the west, which will change orientation to more attractive tourist products in the rich market of international tourist services. The development of inbound tourism due to the orientation of the tourist product to other countries, in particular, those that once were a part of the USSR, has limited opportunities for growth, given the considerably smaller volumes of potential consumers, as well as competition from other countries, with a high level development of inbound tourism.

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