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Methodological problems of inventory and assessment of recreational and tourism potential

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Abstract

The article considers the concepts of recreational resources and recreational conditions and emphasizes that not all recreational conditions and resources can be estimated using quantitative assessment scales. In the case when public recreational goods do not have quantitative assessments, they use the methods of ranking or verbal attributive comparisons. The concept of natural capital is considered in the work, attention is paid to ecological and economic assessments of recreational conditions and resources, also to the participation of the technosphere in the functioning of recreational and tourism activities, ranking of natural resources according to their competitive properties. The directions of development of the methodological scheme of estimation of recreational conditions and resources taking into account modern theoretical and methodical developments of social and economic benefits are marked.

Key words: recreational conditions and resources; recreation and tourism activity; evaluation scales; systematics of recreational goods.

Методологічні проблеми інвентаризації та оцінки рекреаційно-туристичного потенціалу

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Анотація

В статті розглянуто поняття рекреаційні ресурси та рекреаційні умови та наголошено, що не всі рекреаційні умови та ресурси можливо оцінити за допомогою кількісних оціночних шкал. В разі, коли суспільні рекреаційні блага, не мають кількісних оцінок, для них застосовуються методи ранжування чи рейтингового впорядкування або вербальні атрибутивні порівняння. В роботі розглянуто концепцію природного капіталу, приділено увагу еколого-економічним оцінкам рекреаційних умов і ресурсів, акцентовано увагу на участь техносфери у функціонуванні рекреаційно-туристичної діяльності, приведено ранжування природних ресурсів за їх властивостями конкуренції. Позначені напрями розробки методологічної схеми оцінки рекреаційних умов і ресурсів із врахуванням сучасних теоретико-методичних розробок соціально-економічних благ.

Ключові слова: рекреаційні умови та ресурси; рекреаційно-туристична діяльність; оціночні шкали; систематика рекреаційних благ.

Introduction

The resource potential of recreational and tourism activity is traditionally determined by a combination of recreational conditions and recreational resources [1, 5, 12]. Subject conditions and resources are distinguished by their role and functions in the formation of recreational and tourist activity (RTA). Recreational resources are defined as components of the RTA environment that are consumed (used) by vacationers and tourists. In this case, the consumption of recreational resources can be direct, when the resource is used by each vacationer individually, or indirect, if the resource is consumed impersonally, collectively. There are recreational resources for individual, group (collective) and joint (public) usage.

Recreational conditions are not consumed by vacationers. They provide opportunities for the operation of RTA, create more or less favorable conditions for the use of available recreational resources. Recreational conditions determine the best and worst opportunities for

the use of recreational goods. They can have qualitative and quantitative assessments of their role in building overall recreational potential. The presence of quantitative indicators is a prerequisite for the development of appropriate quantitative assessments of recreational conditions. A significant part of recreational conditions characterizes public goods that do not have quantitative estimates. In this case, recreational conditions are divided into the best-worst methods of ranking or rating ordering. If the rating distributions have a conditional reference point - the average, it becomes possible to build relative rating scales, in which relative ratings (ranks, ratings) are obtained by comparing the indicator of each of the objects of evaluation with the average. The effective rating scale has a semi-quantitative formalized expression: each object according to the assessment of recreational conditions has its own quantitative rating in relation to the average assessment. It should be remembered that such indicators are non-operational and do not allow mathematical and statistical processing. Their purpose is to organize objects according to the estimates of recreational conditions and show the conditional (semi-quantitative) difference between them.

Objects of assessment of recreational conditions, which have only qualitative characteristics and do not have a common "reference point" or "average level", can be ordered only by verbal attributive comparisons according to the schemes "more-less" or "better-worse".

The main difficulties in the systematization and assessment of recreational conditions and recreational resources are due to their progressive expansion and complexity. The list of recreational goods is constantly growing, and their ranking is updated again and again. On the one hand, the nomenclature of recreational conditions and resources is developed in sufficient detail and detail, and on the other - there are new varieties of recreational goods, which significantly change their traditional lists.

Objective

The purpose of our study is to review the existing directions and approaches to the systematics of recreational goods with a proposal of their own methodological approaches to the inventory of resource and tourism potential.

Material and method

The methodological basis of this study is the fundamental provisions of the theory of social geography in the field of recreation and tourism. In writing the article used the developments of Ukrainian and foreign scientists, which are set out in the scientific works of Grodzinsky M. D. [2], Hall C., Page S. [3], Pokolodna M. M. [12], Reimers N.F. [13]. The development of a formalized scheme of directions of the systematics of recreational and

tourism potential took place on the basis of a dialectical approach, which requires considering all phenomena and processes in their development, interconnection and interdependence.

Results

Recently, the characterization and assessment as a recreational good of the natural environment has been launched. Naturalists traditionally consider the natural environment as a source of various natural goods in the form of natural conditions and natural resources, but its understanding as a global recreational resource is still in the process of formation. In relation to society, nature has the functions of a living environment that "gives" - air, water, land, minerals, biological resources, natural landscapes, territories and waters. And such "supply functions" of the natural environment have traditionally been considered and studied. Much later, the environment began to be considered as a collector of human waste, as a compensator for various anthropogenic and man-made loads on the environment. This function characterizes the assimilation resource of the natural environment. Researchers are already considering and evaluating the assimilation potential of the environment for its ability to receive and neutralize various wastes of life and its economic activity.

A relatively new type of recreational resource is the quality of the environment. According to traditional approaches, the environment was characterized by its various components and components with appropriate assessments of their contributions to the quality of the environment. The problem of general (integrated) assessment of the quality of the environment (environment) for recreational and tourist activities has become relevant.

The concept of natural capital is being actively developed in world science. The environment is considered as the natural capital of society among other fixed assets of economic activity. Natural capital includes natural resources and natural conditions and performs the following social functions: 1) resource - provides the production of goods and services; 2) ecological (ecosystem) - preservation of the environment; 3) cognitive and cultural functions. In the mid-1990s, the IMF World Bank developed an updated concept of national wealth with three forms of capital - reproductive, natural and human.

The assessment of natural territorial complexes is insufficiently marked in the taxonomies of natural resources, and at the same time only the assessment of landscapes as characteristic and peculiar natural complexes is marked. The landscape direction should be extended to the systematics of recreational conditions and resources: along with the widespread assessments of individual natural components that form the recreational potential of territories and waters, should be developed and integrated recreational assessments of territorial natural complexes as a whole. This is a relatively new type of assessment of

recreational potential, which is already called landscape assessments [2, 9]. The level of scientific and methodological development of assessments of natural complexes (landscapes) in general remains still exploratory and staging. We are talking about the greater or lesser psycho-emotional value of landscapes, about typical combinations of certain recreational conditions and resources in different complexes, and so on.

Along with natural, social and economic assessments of recreational benefits, environmental assessment of recreational conditions and recreational resources attracts considerable attention. Researchers emphasize the complexity of assessing environmental benefits and name the main methodological problems of environmental and economic assessments [7]:

- physiological, social and economic functions of nature are invaluable and can not be valued in principle: no money can replace them;
- natural factors that provide these functions can not be reproduced economically;
- such functions cannot be compensated by other benefits: they are irreplaceable;
- a significant part of the natural factors that perform these functions are not subject to alienation (appropriation) and can not participate in commodity-money exchange.

Ecological resources are defined as a set of environmental elements that ensure ecological balance in the biosphere, and hence the normal living environment of the population [7]. Most of these resources provide public goods as having public (shared) use.

Significant attention of researchers is attracted by the peculiar characteristics of recreational goods of public and shared use. In particular, public environmental goods have the following properties [11]:

- they are relatively inexhaustible (according to modern views);
- are in state or collective ownership;
- do not have the form of classic goods and do not form the relevant markets;
- may indicate potential (future) rental relationships due to different quality and different location of environmental benefits.

We emphasize that environmental conditions and resources are considered as one of the main factors shaping the recreational potential. The environmental situation promotes or limits the use of available recreational conditions and resources.

In a market economy, the importance of socio-economic factors in the formation of overall potential. Researchers note that recently to two traditional groups of recreational and tourist resources - natural and historical and cultural, another group is added - socio-economic resources of RTA [3, 6]. This structuring of recreational goods is used in this work.

The understanding of participation in the formation of recreational goods of the so-called "quasi-nature" [13] - the artificial material world created by man - is deepened. Geographers consider it as one of the earth's crust - the technosphere, which has a global distribution and produces various effects of social life on the environment, which are called anthropogenic-man-made load. Until recently, the impact of the technosphere on the environment under such loads was a priority in studies of the interaction of society with nature. In relation to the RTA, it was seen as a recreational "anti-resource" that limited recreational potential and limited the use of recreational goods.

At present, the participation of the technosphere in the functioning of RTA in scientific developments has significantly expanded and complicated. The technosphere forms a recreational infrastructure, which is considered among the main factors in the development of RTA and the use of recreational potential. The artificial material world has its own nomenclature of recreational goods, which is growing rapidly. These are industrial, port and logistics, engineering and technical, architectural and construction facilities, complexes, systems and landscapes that have become objects of RTA. We are also talking about artificial (unnatural) objects of recreation and tourism, such as Disneylands, water parks, amusement rides, etc., the share of which in the RTA is constantly growing.

Recently, the problem of public recreational goods, mentioned above in the description of environmental resources, has been attracting the attention of researchers. It is established that a significant part of recreational goods does not have the form of individual usage and is consumed as conditions and resources of joint and public consumption. Resources of public (shared) usage are also called free (non-economic) goods. Researchers emphasize the economic paradox associated with the usage of such resources: mass and gratuitous usage of public goods exacerbates the problem of appropriate compensation and protection of shared consumption resources from depletion, the so-called "tragedy of the common" [4]: the common good is consumed rapidly, and the problems of its preservation or restoration are ignored.

As an example, consider the features of natural recreational resources for shared use:

- these are exhaustible natural resources;
- they are characterized by rent relations due to their different quality and location;
- typical competition for the right to access and use such resources;
- can be objects of state, collective and private property;
- can take the form of goods and create markets for relevant resources.

Researchers [8, 6, 10] emphasize that public environmental goods and natural recreational resources of shared usage form a non-market sphere of economic activity in nature management, according to which recreational goods have the form of goods.

In the economics of nature management [11] natural resources by their availability and properties of competition (competitive exclusion) are ranked on:

- 1) the benefits of free access - availability for use by each individual and can not be competitive - excluded from use for some at the expense of others (such as air, climate, etc.);
- 2) resources of joint consumption - natural goods available for use to all that have competitive properties that limit the consumption of some at the expense of others (such resources are land, minerals, water resources, etc.);
- 3) natural resources of joint use that do not have the properties of exclusion (competition): beach resources, recreational resources of green areas for public use, water areas for recreation.

Public environmental goods have the following properties:

- are considered relatively inexhaustible;
- are in state or collective ownership;
- do not have the form of classic goods;
- can form rental relationships due to different quality and different locations

Natural resources for sharing:

- exhaustive;
- competitive, with a rental ratio;
- objects of state, collective and private property;
- may take the form of goods.

In a market economy, the importance of socio-economic factors in the classifications and taxonomies of recreational goods is growing. In domestic resource science, recreational and tourism potential has recently been assessed in terms of recreational conditions and recreational resources, and now it has become necessary to characterize it in terms of property relations and opportunities to use it as a public, collective or community good. According to modern approaches, the assessment of recreational benefits should take into account their possible participation in the formation of market relations [7]. The realization of market relations can be direct, if the recreational resource has the status of the object of sale, or indirect (indirect), if the object of sale is not a resource, but its action (influence) - the so-called resource function. Note that in modern developments, increased attention to the

physiological and social functions of the natural environment as opposed to traditional economic functions.

Conclusion

The given review of directions and approaches to systematics of recreational goods gives such generalizations. The traditional division of recreational goods into conditions and resources of rest and health retains its role. There is a tendency of constant and consistent expansion and complication of lists and characteristics of recreational conditions and recreational resources. The methodological limitations of such an approach, which is sometimes considered "classical", are also becoming obvious. There are all new varieties and forms of RTA, which require appropriate theoretical and methodological understanding and methodological development.

Further development of the system of recreational goods requires the solution of numerous methodological problems and difficulties, covering the composition of recreational conditions and recreational resources, principles and methods of their evaluation - social, economic, environmental, organizational and managerial. We will briefly present such problems.

First, it is necessary to extend the classical division of recreational goods into conditions and resources, developed for natural components, to other components of recreational potential - to historical, cultural and socio-economic blocks. Secondly, it is necessary to take into account in the following taxonomies the subject originality of cultural-historical and socio-economic conditions and resources, compared to the traditional natural block. In many developments, the principles of classification of natural conditions and resources are automatically transferred to the historical, cultural and socio-economic components without taking into account their subject specificity. Third, in the classifications and taxonomies of recreational goods must take into account modern theoretical and methodological developments of socio-economic goods. Scientists substantiate the economic principles and approaches to the taxonomy of natural and socio-economic conditions and resources that must be used in developing the classification and taxonomy of recreational goods. Substantially close to the principles of systematics of recreational goods socio-economic division of users of goods into groups of public and individual use, and taking into account property relations - on public (social), collective (group, community) and private use. Fourth, scientists emphasize the so-called environmental imperative (moral law): given the global environmental crisis in any strategy and concept of socio-economic development, the criterion of environmental safety becomes paramount. In relation to the problem of taxonomy

of recreational goods, the ecological imperative is marked by numerous developments of ecological goods, which are considered as the main recreational resource.

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