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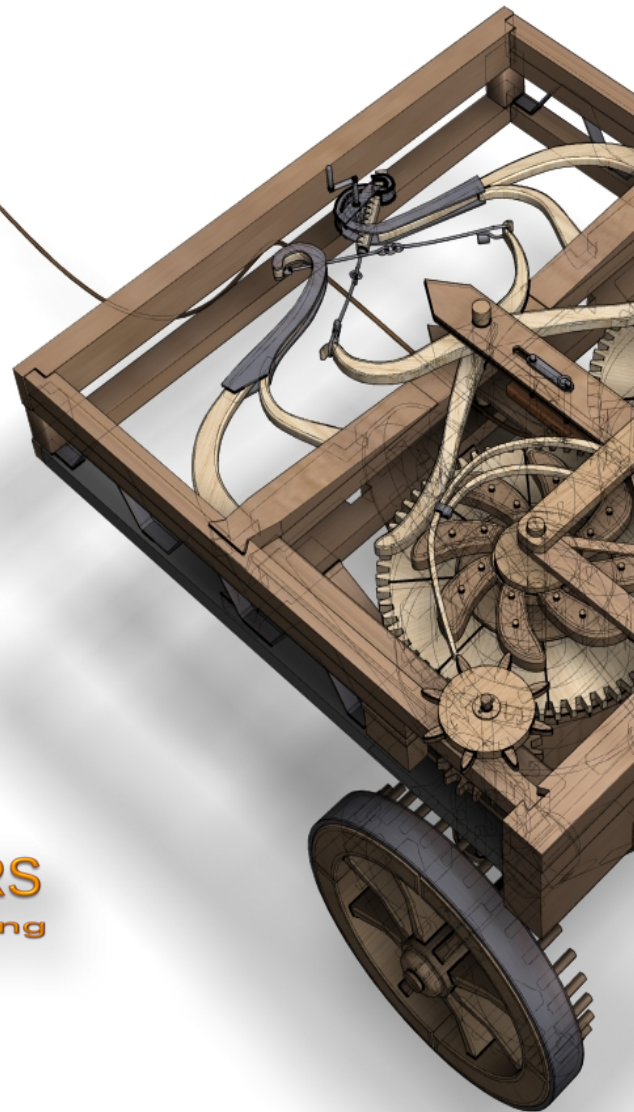
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Domestic Tourism in Russian Federation: Population Estimations, Resources and Development Constraints

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Abstract:

Russia is the country of contrasts, the country with a great tourist and recreational potential and rich cultural and historical heritage, but the Russian domestic tourism figures are relatively low. In this regard, according to the authors' opinion, the study of factors that prevent the development of Russian territory tourist attractiveness by the analysis of social expectations, preferences and the satisfaction of tourists with proposed domestic market of tourist services is very important one.

The empirical base was represented by the results of the study conducted by All-Russian Council of Local Self-Government (with the participation of authors) in order to analyze the tendencies of tourist and cultural potential development in respect of Russian Federation municipal entities and the determination of limiting factors in the activities of local authorities. The sample consisted of 514 experts (heads of local authorities from Russian Federation municipal bodies). There was also a sociological study conducted by the team of authors in the municipal districts of Moscow region, during which 680 people were interviewed. Questionnaire survey was the leading research method.

The performed study and the analysis of tourism industry development factors allowed to determine a number of problems that hinder the development of domestic tourism in Russian Federation: an underdeveloped tourist infrastructure, a

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poor quality of service (unprofessional staff), weak promotion of a national tourist product and area image, the absence of national tourism industry promotion, the lack of effective mechanisms for investment climate state stimulation in Russian tourism industry. Expert survey results showed that infrastructure problems become the main reason for territory competitiveness reduction within the tourist market for most municipalities in present conditions. In order to address the identified problems related to the lack of funding or the absence of finance in municipalities, the authors propose and justify the introduction of local tourist taxes. The solution of the problem concerning an insufficient level of information and advertising support for the local tourism potential and the promotion of domestic tourism product is considered by the authors as the development of an interactive general "Russian Federation tourist map" published in Internet.

Keywords: cultural and educational tourism; tourist attraction; tourist services; tourist infrastructure; domestic tourism

JEL Classification: Z1; Z3

Introduction

Nowadays the field of domestic tourism is the most dynamic and promising direction of economic development. Currently the development of domestic tourism in Russia is at the stage of popularization and mass attraction increase. Russia has all resources, including the unique natural and recreational ones, which should contribute to the promotion of tourist facilities among Russian and foreign tourists. Due to geographical location peculiarities the territory of Russia has a rich natural and climatic diversity and a rich cultural and historical heritage (26 sites of UNESCO World Heritage) develops the potential for tourism growth. The presence of various tourist and recreational resources of the country allows you to develop almost all types of tourism, including recreational (beach), cultural, educational, business, active, wellness and eco-tourism, as well as sea and river cruises, rural tourism, etc. According to the federal target program in various regions of Russia adopted during 2011 the networks of competitive tourist-recreational and auto tourist clusters contributing to the growth of employment through the creation of additional jobs in the tourism industry, meeting the needs of different categories of Russian citizens in an active and proper rest, health promotion, the introduction to cultural values and the increase of foreign tourist flow should be established by 2018.

However, despite the ongoing efforts to create the conditions for the development of the tourist attractiveness in the regions of Russia, its level remains a considerably low one in the eyes of domestic and foreign tourists. During recent decades, the outbound tourist flows from our country outnumbered domestic and inbound ones (e.g., in 2013 23% more tourists emigrated from Russia than during the same period of 2012). This was explained by a large number of proposals concerning various tourism products from tour operators focused on outbound recreation, public interest in foreign countries and a more favorable "price - quality" ratio concerning a foreign recreation as compared to a national one.

In the ranking of countries concerning the competitiveness of travel and tourism Russian Federation was only 45th one among 141 countries in 2015. At the same time some positive dynamics is worth noting. As compared to the year 2013 the position of Russia increased by 18 points in the ranking presented by the World Economic Forum. According to VCIOM, Russia occupies the bottom ranking lines among the most attractive places for travelling, which is confirmed by the surveys conducted by the Public Opinion Foundation. According to official figures, more than a third of Russian citizens (36%) did not travel around the country, every third Russian (30%) could not name the main attraction of Russian Federation, 8% of respondents' appeal to the absence of places in Russia which they would like to visit and sights that they would like to see.

Currently, due to the dramatic changes in Russian economy, including the market of tourist services, the issues of search for resources and the opportunities for domestic tourism development become the relevant ones. There is a sharp decline of foreign tour sales for Russian citizens. According to Rosstat, the number of Russian tours abroad made about 36 million ones during the first nine months of 2014, which is 14% less than in 2013. These processes are based on economic changes. In December 2015 Russian Public Opinion Research Center (VCIOM) presented the survey data about the most appropriate kind of policy in relation to tourism industry according to Russians. According to the data of the survey (conducted after the announcement of flight prohibition to Egypt), two-thirds of Russians (67%) consider it is necessary to concentrate the efforts of Russian authorities on the development of domestic tourism, and not on the safety of overseas trips.

Due to the current contradiction between the state policy in the field of favorable conditions creation for the development of domestic tourism and the results of public opinion polls among the consumers of tourism services the study of the factors hindering the development of Russian territory tourist attractiveness through the analysis of social expectations, preferences and satisfaction of tourists from tourist services offered by the domestic market seems to be a relevant one (Frolova and Kabanova 2015).

1. Analysis of recent publications on the problem

The issues of theoretical nature, the analysis of the conceptual apparatus on the problems of tourism and tourism infrastructure are reflected in the works of such scholars as Alexandrov (2010), Vinogradov (2010), Evreinov (2012), Zabaeva (2011), Makatrova (2009) and Shishkin (2013). The development of tourism and the quality of tourist services is considered in the works of the following foreign researchers: Farina Srihadi (2016), Țițu *et al.* (2016), Mohd Hafiz Hanafiah, Inoormaziah Azman, Mohd Raziff Jamaluddin, Norliza Aminuddin (2016), Bouchon and Rawat (2016), Nor'Aini Yusof, Rahman, Che Jamil and Iranmanesh (2014).

In particular, the analysis of foreign studies concerning the satisfaction with tourism services shows that among the factors that influence the citizens' satisfaction from a tour, the biggest impact is performed by "tourist service" and "recreational activities» (Chan, Hsu and Baum 2012), the infrastructure and the mobility of tourists (Secondi *et al.* 2011). At that transport infrastructure also makes an impact on the development of tourism demand, depending on the well-being of tourists (Bimonte, Ferrini and Grilli 2014). The research performed by Pearce and Wu (2015) emphasized the importance of a flexible infrastructure creation at tourist sites for Asian tourism development. The works which analyze the direction of territorial image development, the specifics of local authority activity with for the socio-economic development of an area, including tourism infrastructure are of considerable interest (Kryukova *et al.* 2014, Frolova 2016, Jones and Stewart 2012). However, the reserve for research is in the analysis of administrative resources and factors influencing the development of tourist attraction.

The purpose and the objectives of the study

The study of factors and management resources, preventing the development of Russian territory tourist attractiveness by the analysis of social expectations, preferences and satisfaction of tourists from the proposed domestic market of tourist services.

Results

In February - May 2015 the All-Russian Council of Local Self-Government (with the participation of authors) conducted the following study: "The development of tourist and cultural potential of Russian Federation municipal entities" by sending questionnaires in Internet. The sample included 514 experts (heads of local authorities from Russian Federation municipalities). The goal is the analysis of Russian Federation municipality tourist and cultural potential trends, the determination of limiting factors in the activity of local authorities. Besides, in order to enhance the knowledge of sociological perspectives of Russian tourism market development the team of authors conducted a sociological survey on the following topic: "Prospects of tourism industry development in modern Russia" in 2016. The empirical basis of this survey was represented by the municipal regions of the Moscow region. The total amount of the sample made 680 people. Questionnaire was used as the leading method of research.

According to the analysis of sociological survey data, the level of tourist attractiveness on the territories of Russian Federation is not high enough. The obtained data suggest the need of search for some new ideas of domestic tourism development, the development of Russian region tourist attractiveness technologies. Rich natural-recreational and cultural resources, as well as the infrastructure of air transport and telecommunications infrastructure are marked from the factors of competitiveness, according to which and the tourist potential and country possibilities are evaluated, and Russian Federation advantages. At that currently the tourist offers in Russia are much more competitive in price due to the significant depreciation of ruble. At the same time, one of the major constraints in a tourist traffic attraction is an insufficiently developed tourist infrastructure, an unfavorable business climate and a low level of international openness, particularly in the field of visa requirements for the travelers from

other countries. In general, Russian tourism sector regulation environment was described as an unfavorable one by experts (World Economic Forum).

The results of population survey with different income levels concerning the evaluation of Russian and foreign cultural and educational tourism potential are of interest.

Table 1. Assessment of Russian and foreign cultural and educational tourist potential

Indicator	Russia			Av. point	Foreign tourism			Av. point
	H	C	B		H	C	B	
Comfort of living	3,5	3,6	3,6	3,6	4,3	4,3	4,6	4,4
Affordable price	3,4	3,5	3,6	3,5	4,1	4,3	4,5	4,3
Service	3,6	3,6	3,7	3,6	4,3	4,4	4,7	4,5
Meal quality	3,3	3,4	3,6	3,4	4,3	4,4	4,6	4,4
Ecological environment	3,6	3,7	4,1	3,6	4,2	4,4	4,7	4,4
Availability of health and eco-tours	3,2	3,3	3,5	3,3	4,5	4,6	4,8	4,6
Criminal environment level	4,1	4,1	4,0	4,1	3,6	3,6	3,5	3,6
Safety threat (terrorist acts)	3,7	3,7	3,8	3,7	4,4	4,5	4,5	4,5
Climatic features	3,2	3,3	3,3	3,3	4,2	4,3	4,5	4,3
Historical and cultural values	4,1	4,2	4,2	4,2	4,2	4,2	4,2	4,2
Presence of world-class attractions	3,1	3,2	3,2	3,2	4,3	4,4	4,7	4,5

Note: l - low income, av. - average, h - high

According to Table 1, grade 3 prevails in the evaluation of Russian tourism potential by population, and grade 4 prevails in the evaluation of foreign tourism potential. At that if the evaluations in terms of "climatic features," "comfortable living", "service", "meal quality" are confirmed by other surveys, then in terms of "health and eco-tours availability", "the presence of world-class attractions" the population survey differs from the opinion of experts. This is probably due to the greater awareness of offered tourism services. According to the authors, these estimates of Russian and foreign cultural and educational tourism potential demonstrate the stereotype developed during the Soviet era that "everything is better abroad". Table 1 demonstrates mainly the indicators of economic factors contributing to the development of domestic and inbound tourism, but in respect of indicators reflecting political and social factors the answers were as follows.

Table 2. Evaluation of domestic and foreign tourist potential according to economic and political indicators

Indicator	Russia			Av. point	Foreign tourism			Av. point
	H	C	B		H	C	B	
Favorable country image	2,5	2,6	2,6	2,6	4,4	4,6	4,7	4,6
The level of population welfare (standard of living and safety)	3,2	3,2	3,6	3,3	4,1	4,3	4,5	4,3
The level of culture, health and income	3,6	3,6	3,7	3,6	4,5	4,4	4,7	4,6
The amount of leisure time	4,3	4,4	4,2	4,3	4,3	4,3	4,2	4,3
Population mobility	3,6	3,7	4,1	3,6	4,2	4,4	4,7	4,4
Local population tolerance	3,6	3,7	4,1	3,6	3,4	3,7	3,7	3,6
Favorable visa regime	3,2	3,3	3,5	3,3	4,5	4,6	4,8	4,6
Protection of foreign citizen rights	3,5	3,4	3,6	3,5	3,6	3,6	3,5	3,6

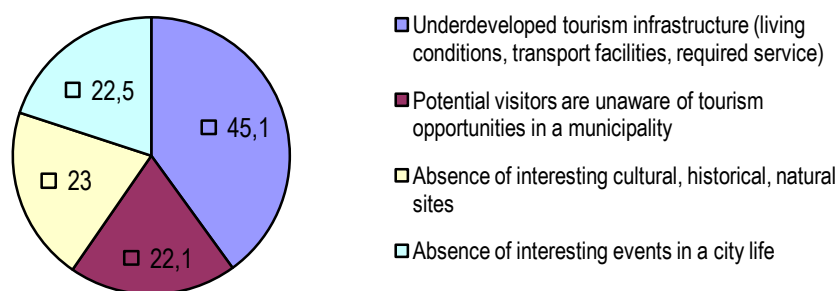
Note: l - low income, av. - average, h - high

The survey of citizens shows an overall satisfactory assessment of Russian potential, but in comparison with foreign potential assessment the skepticism regarding the national tour industry prevails. The heads of territories and the country should give a particular attention to the operation with media during country image

development. The opinions of citizens had the following statements: "Russians are liked nowhere", "foreigners think that bears walk along the streets in Russia", "foreigners have no conditions for a decent holiday in Russia", etc. However, the citizens evaluate the tolerant attitude of the local population, the amount of leisure time, the protection of foreign citizen rights and the historical and cultural values in Russia and abroad almost in the same way on the average.

The results of these studies also showed that in present conditions infrastructure problems are the main reason for the competitiveness of territories reduction at the tourist market within most municipalities (Frolova *et al.* 2016). Statistical data are confirmed by the results of an expert survey. More than half of surveyed local government leaders (51.8%) state the insufficiency of accommodation facilities (hotels and hostels). Besides, the experts provided quite low grades concerning the quality of accommodation at hotels on the territory of a municipality. This problem was reflected in the population responses. 45.1% of respondents noted a low level of tourism infrastructure development in Russian cities, 12.1% say about its crisis state.

Figure 1. Factors, which prevent the development of tourism in a city (a settlement)

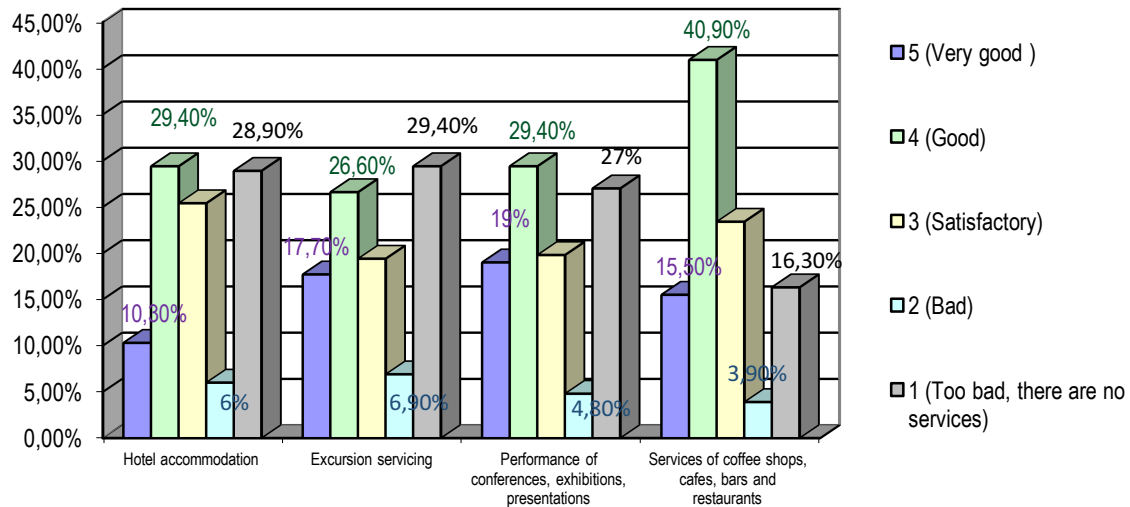


In your opinion, what does prevent the development of tourism in your city (settlement)?

The results of population survey also allowed identifying the tourist infrastructure problems directly. The vast majority of respondents identified the disparity problem between prices and the quality of tourism services (67%), the lack of development and the obsolescence of infrastructure were marked by 36.5%. An insufficient and a poor quality of service infrastructure were noted by 43%. These results are consistent with the expert surveys of local government leaders.

It was also found during the course of the study that human factor is one of the most important unsolved problems in tourism sector. According to survey results "unprofessional staff", "incompetent employees of travel companies (guides)" occupy the 2nd place in the analysis of the factors hindering the development of domestic tourism in Russia. 67% of respondents prefer an abroad holiday than domestic tourism industry because of better service and staff friendliness abroad. At the same time 53% of respondents believe that "nothing can change Russian mentality".

Figure 2. The level of provided tourist services in your municipality according to a 5-point



Despite the results obtained during the study results there are very successful projects being implemented and gaining momentum in order to create a favorable image of a territory and increase tourist flows. For example, the city of Kolomna is not included in the Golden Ring of Russia, but it is being developed actively, and it creates favorable conditions for tourists, both for Russian and for foreign ones. The area has a favorable transport and geographical position: its territory is crossed by highway, rail and water transport of national importance. The territory of Kolomna district has 106 sites of historical and cultural heritage, including 33 federal sites of cultural heritage, 41 monument of regional importance and 32 sites of historical and cultural value. The territory of the Kolomna district has one monastery, 27 temples, 2 holy sources and 4 chapels. Most of the church buildings are the monuments of history and culture within the regional and federal levels.

In 2012 Kolomna district was visited by 4337 visitors, and in 2016 it was visited by 173 thousand tourists. In 2016 the district became the priority project of the Ministry of Culture of Moscow Region "Top 10 sites of the Moscow region in tourism sector". The hotel complex "Sunflowers" named was acknowledged as the best mini-hotel of the year in the Moscow region, despite the fact that more than 53 hotels and guest houses are operated on the territory of Kolomna municipal district.

Thus, the performed study and the analysis of tourism industry development factors allowed determining a number of problems that hinder the development of domestic inbound tourism in Russian Federation:

- insufficiently developed tourist infrastructure;
- poor quality of service (unprofessional staff);
- weak promotion of a national tourist product and area image;
- lack of national tourism industry promotion;
- lack of effective mechanisms concerning the state stimulation of investment climate in Russian tourism industry.

Discussion

Financial resources are an important factor in the development of tourism infrastructure and tourism. In order to develop the material and financial resource base of Russian territories, first and foremost, you need to create a system of incentives providing a high performance of management practices for tourism functioning in municipalities. Taking into account the transformation of interactions between federal, regional and local authorities, the introduction of local tourist taxes may be an additional stimulus.

Tourist tax is a fee that is charged from tourists by local authorities. According to the author, a tax can be extended to all travelers in the accommodation facilities of a municipality and is payable by them at the time of arrival or departure. This tourist tax is applied to tourists traveling on their own, and to excursion groups. According to the author, it is assumed that the tax rates are set by local administration in all municipalities. The size of taxation should have a fixed minimum and maximum rate established in accordance with accommodation facility comfort level. There are four ways of tourist tax calculation and charging in world practice:

- a travel fee depends on the number of nights and charged from each tourist, who lives in an accommodation room;
- the amount of a tax depends on the number of nights, but unlike the first method it does not depend on the number of tourists who stay in a room;
- a tax was originally included in the price of an accommodation room;
- the amount of a tourist tax is calculated as a percentage from a room rate.

The provision of motivation system terms for local government in order to develop the tourist attraction will allow developing the tourist infrastructure, to preserve the tourist potential, to develop and implement innovative tourism projects, create new jobs in the tourism industry in Russian municipalities. This will lead inevitably to a sustainable socio-economic development of a territory and will improve the quality of local people lives (Kabanova *et al.* 2016).

At present, the development of tourism in Russian Federation is constrained by a number of social problems, of which a dominant position is occupied by the issues related to the lack of a decent promotion and popularization of tourist capacities and Russian territory capabilities in mass media. During the last 20 years, tourism is perceived in Russian Federation only as a trip abroad. In its turn, the popularization of tourism is performed in this direction exactly.

The survey in August 2013 (Public Opinion Foundation, 1500 respondents were surveyed) established a low level of public awareness about tourism opportunities in Russian territories as the limiting factors in the development of domestic tourism. So, almost every third inhabitant of the country was not able to name the main attraction of Russian Federation. 8% of respondents believe that Russia has no places where they would like to visit, each fifth person (22%) found this issue difficult to answer. The obtained results are confirmed by expert survey data. Thus, according to the heads of local authorities, the main limitation of tourism development in Russia is the lack of information and advertising support for the local tourism potential (experts identified two issues: the potential customers do not know about the possibilities of a tourist attraction in a municipality and the lack of funds for advertising).

One of the trends for this problem solution is seen by the authors as the development of a general interactive "Tourist map of Russian Federation" posted on Internet. An interactive map is a modern and a handy tool in the search of the country tourist sites. Currently, this practice is not implemented in full, the tourist maps are developed only in a few municipalities and regions of Russia, and do not contain sufficient information on the tourist attraction areas. From the author's point of view, an interactive tourist map of Russian Federation should provide information that reflects the possibility of Russian tourism and recreation. The map will reflect the complete information about the specifics of territorial attractiveness, tourist services, tourist potential objects and tourist infrastructure of municipalities. Every tourist attraction should have a reference manual with photos and videos. The development of the section "Forms of Tourism" is an innovative one within an online resource. An Internet user during the selection of an interested type of recreation has an opportunity to get acquainted with the municipalities, which have this type of tourism as a developed one. Municipalities, which represent the selected tourism should be organized and arranged by regions and federal districts (Kabanova 2016).

A tourist map with a handy navigation system will allow tourists to develop a travel plan and to explore the visited municipalities as fully as possible. The development of innovative technologies in the field of tourism will contribute to the promotion of tourist attraction, increasing the awareness of regions and municipalities, the promotion of a tourist product and the development of domestic tourism.

In modern Russian conditions it is possible to upgrade the information and advertising technologies and to perform the branding of areas. The promotion of tourism potential at the municipal entities of Russian Federation requires conceptually new and innovative approaches. One of the resources in the promotion of the tourist attractiveness concerning a specific municipality is the advertising support. Firstly, advertising must promote the capabilities of Russian tourism in mass media. According to international experience, the field of tourism is the largest advertiser. Foreign tourist firms spend 5-6% of income derived from their activities on various types of tourist advertising. The possibilities of domestic tourism in Russia are covered basically only in press and this does not cover a wide range of tourism service potential consumers. In practice, they should implement such modern elements of Russian tourism product promotion as advertising on radio and television, as well as via online resources. The advertisement focused on mass audience is an effective means of information materials spreading about tourist services.

Television presents significant opportunities for RF tourism potential promotion. Nowadays modern communications allow broadcasters to transmit their programs over long distances and distribute information rapidly not only in the country but also abroad. Modern technologies allow to meet the needs of the audience in obtaining of timely and accurate information about travel. The promotion of municipality tourist attractiveness is possible within the framework of television program creation about tourism on federal channels. These TV programs not only make possible the distribution of information about the tourism potential of municipalities, but also will contribute to the effective collaboration between the state, local authorities and private investors in order to finance and promote the tourism projects aimed at the development of different types of tourism (Kabanova 2016). According to the author, it is advisable to create a TV channel dedicated to Russian tourism, where various television genres will be presented (programs about the tourist potential of municipalities, events, crafts and traditions, interviews with experts, travel essays and films, and much more). The organization of a corresponding site, which will expand the target audience of a tourist channel, is also interesting (Essam Abdel Wahed Abdullah Mahmoud, 2011).

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Conclusion

Thus, within the framework of the performed study the authors highlighted the factors that prevent the formation of Russian territory tourist attractiveness by the analysis of social expectations, preferences and satisfaction of tourists from the proposed domestic market of tourist services. It was found that people estimated Russian tourist industry as a losing one according to virtually all indicators as compared with an abroad one. Despite the cultural and recreational potential of Russia, domestic tourism and its development depends on many factors: political stability, stability in the world, a state image, terrorist threat level, the state of infrastructure, maintenance, tolerant attitude of population, etc. The identified factors allowed concluding that the development of tourism in Russia should be based on the development of new tourism product options, on infrastructure development, as well as on tourism product promotion and the creation of a territory positive image. At that it is necessary to pay a special attention to the development of a "culture of leisure", which reflects not only the willingness of the tourism sector employees and the population of the host regions to the manifestation of tolerance and hospitality, but also a respectful and a caring attitude of tourists to people, visited sites and territories.

The classification of the identified constraints concerning the development of tourism in Russia allows identifying three main areas of regional tourism industry integrated development and improvement:

- tourist infrastructure improvement;
- the branding and image making of tourist places in Russia and the country as a whole;
- the development of administrative and legal regulation.

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