

INBOUND TOURISM WITHIN THE CONTEXT OF RUSSIAN TOURIST MARKET TRANSFORMATION

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ABSTRACT

Russian outbound tourism is well noticed in the World Tourist Market. Exporting tourist services to Russia has been the boon for the economies of many countries. Nowadays new tendencies are being revealed which should radically change the structure of Russian national tourism and influence the International tourism. There are outer and inner, market and political reasons for that. In Russia the government supports the inner and inbound tourism by means of programs and the strategy of its development. Entrepreneurial activities, competition, investment in tourism and tourist infrastructure are growing as well. In nowadays Russia the shift from "The industry of outbound tourism" to "The industry of national tourism" is well seen. The latter brings additional revenues to Russian regions. Current economic and political situation is contributing to this process. The economic-crisis-related decline in incomes pushes Russians to travel abroad less and instead increases the number of travelers within the country to cheaper destinations. Facing economic sanctions Russian authorities search for inner investment and the possibilities to reduce the cost of import. They started paying more attention to inner tourism. Under the slogans of "import-substitution" and "counter-sanctions" some restrictions on outbound tourism, preferences for the national tourism industry, and stimulation of consumers' demand were elaborated in this paper. Also the outbound tourism restrictions, prohibition for some foreign companies to act on Russian tourist market became a political factor. The decline of Russian outbound tourism strengthens the competition among its destinations. It is related to Republic of Croatia. The number of Russian visitors to Croatia declines from year to year. On the one hand it may have negative influence on Croatian tourist market, on the other – it opens new possibilities to find ways to attract more visitors from Russia. We suppose that it may be in the interest of Croatia.

Key words: Croatia, inbound tourism; outbound tourism; Russia

1. INTRODUCTION

The sphere of tourism faces the impact of different negative and positive factors. Some factors are common relating to the World Tourist Market, others influence particular countries and regions.

In the year 2012 Russia was the 9th travelling country and the 7th country in tourist expenditures in the world (Alexandrova, 2015). Since then Russian economy in general and tourist market in particular are challenged by economic problems caused by low oil and gas prices (resulting in prominent devaluation of ruble), general slowdown of the World economy and political difficulties which resulted in Western sanctions and worsening of relations with Turkey. As a result Russian outbound tourism is shrinking while the inner and inbound tourism are growing.

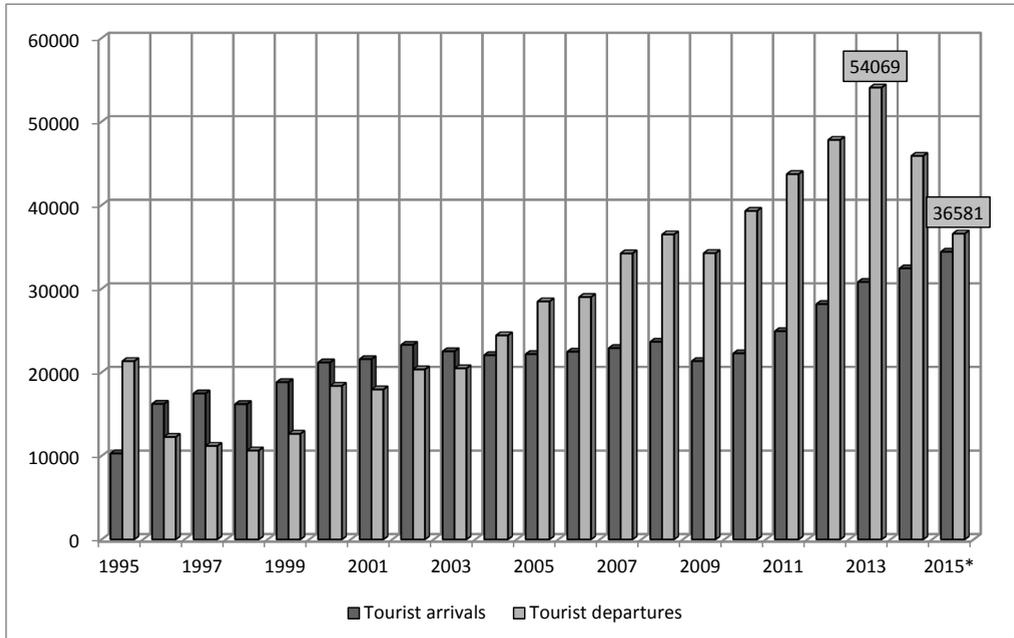
This seems to be a long-term tendency. The decline in numbers of Russian visitors to almost all countries including Croatia is a warning signal to those who want to retain tourists contributing to the economic development of accepting destinations. Can anything be done to change the current state of affairs?

2. CHARACTERISTICS OF RUSSIAN INBOUND AND OUTBOUND TOURISM

The cumulative effect of different factors influencing Russian tourist market is found in the dynamics of departures and arrivals to Russia in general and with different purposes. These flows are counted by The Federal Government Statistics Service based on the data provided by The Federal Border Service of the Russian Federation. Those who change the country of residence are not counted. General data of departures and arrivals are divided into different purposes of trips among which are: "business", "tourist", "transit", "private", "operating personnel". The arrivals and departures data are shown on the official sites of The Federal Agency for Tourism, The Federal Government Statistics Service.

The picture 1 shows the data on foreigners' arrivals to Russia and Russian citizens departing from Russia in 1995-2015.

Picture 1: The data on foreign citizens visiting Russia and Russian citizens going abroad in 1995-2015 (thousand trips)



Source: <http://www.russiatourism.ru/contents/statistika/statisticheskie-pokazateli-vzaimnykh-pozdok-grazhdan-rossiyskoy-federatsii-i-grazhdan-inostrannykh-gosudarstv/>

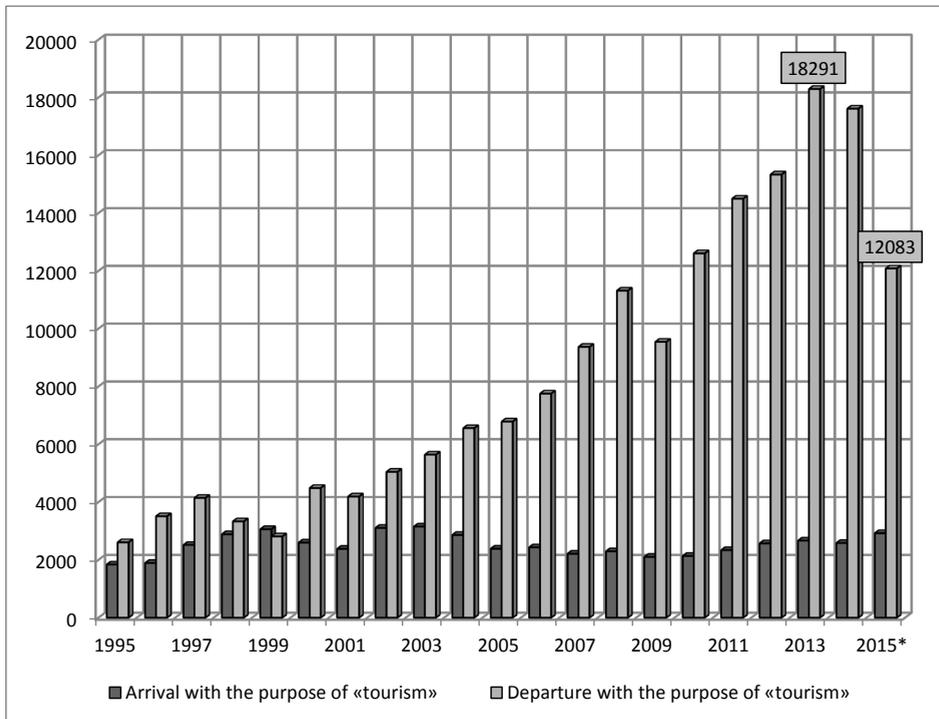
Arrivals to and departures from Russia were showing different dynamics during these years. In 1994-2003 there were more arrivals than departures. In 2004-2013 it was vice versa: the number of departures was growing fast having reached the record-breaking 54 million in 2013. Starting with the year 2014 the tendencies have changed: the number of arrivals continues growing quite fast while that of departures begins to fall. In 2015 only 36 million Russians made trips outside the country (68% to the maximum level of the year 2013). These data are almost the same with those of inbound trips reaching 34 million. This dynamics of departures in previous years was due to the growth in incomes of the Russian population, activity of tourist firms working with outbound tourism, attractiveness of many tourist destinations in different countries of the world. At the same time the country faced the negative changes in the balance of payments and reduction in investment opportunities into domestic tourism. In 2014 as well as in 2009 the consequences of the economic crisis in conjunction with the reduction in households' and tourist firms' incomes showed up. The tensions in relations between Russia and the West were growing: in 2009 due to Russian-Georgian relations, nowadays to the situation in the Ukraine. Russian outbound tourism is probably entering a difficult time span, similar to that of 1990s. At that time the consequences of the economic crisis «froze» the tourism.

Nowadays political factors enter the game as well. At the same time the data of the 2011-2015 inbound tourism to Russia are rather optimistic. The number of tourist arrivals grew even faster than in the world in general. It was due to several factors favorable for the inbound tourism: several state-organized events predominantly in the sports sphere, gradual development of the tourist infrastructure, growth in activity of regional tourist authorities and the business, better security, liberalization of visa formalities in several cases. We should admit that the anti-Russian rhetoric and political tensions have not told upon popularity of Russia to foreign visitors.

Picture 2 shows the data on foreigners' tourist arrivals to and Russian citizen's tourist departures from Russia in 1995-2015. Basically these data are similar to those of total trips we spoke above. The general level is higher than that of tourist trips due to migration. The indicated number of tourist trips is lower than the real tourist flows because they do not include the trips with private purposes. The latter are basically touristic. Only in August, 2014 the new methods of estimating inbound and outbound tourist flows were adopted in Russia following the International tourist statistics recommendations of 2008. The latest data at our disposal are of the first 9 months of the year 2015. It seems to be convenient to use data on total amounts of arrivals and departures. They are close to the index of International tourist arrivals used in the world. Secondly, they were used while elaborating indices-criteria in the Russian National Tourism Development Strategy, federal and regional programs of tourism development.

The above-mentioned new methodology is elaborated following the purposes of working out Russian official statistics information about tourist trips to Russia and tourist departures from Russia within the framework of International tourist statistics recommendations of 2008 (ITSR – 2008). For more detailed characteristics of inner and inbound tourism the departures-arrivals analysis should be supported by analyzing financial aspects of tourist flows. The source of such information is the data on the Balance of payments of Russia which are published by The Department of Statistics of the Central Bank of the Russian Federation (http://www.cbr.ru/statistics/credit_statistics/bp.pdf).

Picture 2: The data on foreign citizens visiting Russia and Russian citizens going abroad (with tourist purposes) in 1995-2015 (thousand trips)

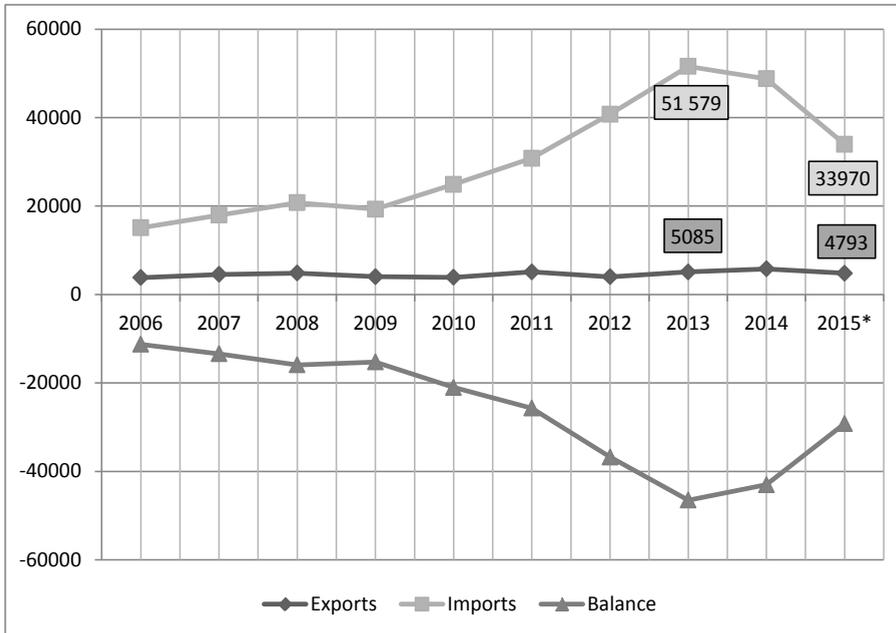


Source: <http://www.russiatourism.ru/contents/statistika/statisticheskie-pokazateli-vzaimnykh-pozdok-grazhdan-rossiyskoy-federatsii-i-grazhdan-inostrannykh-gosudarstv/>

Picture 3 shows the dynamics of the «Trips» account in Russia's Balance of Payments in foreign services' trade, in 2006-2015.

Russia has got a negative balance in foreign services' trade because there were more departures than arrivals. In the year 2013 Russia lost 10 times more than it had achieved and the negative balance reached 46,5 billion USD. During last 10 year the loss was really sky-high – 258 billion USD. Exports and imports of services encompass the expenditures of citizens of a particular country during their trips to other states. This index summarizes expenditures on all goods and services obtained for personal needs or as a gift to others.

Picture 3: Russia's Balance of Payments in foreign services' trade, the «Trips» account in 2006-2015 (mil USD)



Source: <http://www.russiatourism.ru/contents/statistika/statisticheskie-pokazateli-vzaimnykh-pozdok-grazhdan-rossiyskoy-federatsii-i-grazhdan-inostrannykh-gosudarstv/>

Table 1. shows the data on exports and imports of services, including those of business trips.

Table 1: The balance (exports - imports) in foreign services' trade in Russia in 2014, mil USD

Foreign services' trade	Exports	Imports	Balance
Services total	65 744	121 022	-55 278
Including:			
Trips, total	11 759	50 428	-38 669
Including:			
Private trips	5 778	48 785	-43 006
Business trips	5 981	1 643	4 338

Source: http://www.cbr.ru/statistics/credit_statistics/bp.pdf.

The positive balance in business trips partially compensates for the losses from the private trips. None the less, the financial losses caused by tourist exchanges made up for almost 70% of the deficit of Russia's foreign services' trade in 2014. The outflow of the capitals is the problem of Russian tourist business. High demand for outbound trips is caused by some objective factors. Russia is a northern country where people are missing the Sun and warmth. That is why Turkey and Egypt have been the leading destinations of Russian outbound tourism. Also after decades of being behind the iron curtain the people of the country are getting to know the world. Russian tourist industry has not yet been able to elaborate mass tourist products competitive in the International tourist market that could radically increase the inbound tourism. Tourist firms continue to emphasize outbound tourism and pay not much attention to a difficult task of organizing inner and inbound tourism. In this context we must admit the interruption of entrepreneurial traditions in Soviet Union for ideological reasons where all economic activity was state-controlled. Private enterprising was regarded as a crime in Soviet Union. At the same time there are some positive tendencies: the growth of trips to Russia and a small increase in revenues from inbound tourism. Decline in exports of services («private trips») to Russia in 2014 was due to serious devaluation of Russian ruble against dollar and euro. Negative balance of foreign services' trade in Russia has started to reduce since 2013 due to the crisis in Russian outbound tourism.

Table 2 shows the data on Russian trips to the most popular destinations of outbound tourism in 2013, 2014 and the first 9 months of 2015.

In 2014 tourist trips outside of Russia reduced from 18,3 to 17,6 million, or by 3,7% to the level of the year 2013. During the first 9 months of 2015 to the same time period of 2014 the reduction was already 31,4%.

The dramatic events connected to Egypt and Turkey happened at the end of the year 2015 and are not shown in these data. After the terrorist act on board the Russian plane returning from Egypt appeared a ban on Russian tourist trips to this country for safety reasons (till the dangers are ruled out). Then charter tourist flights to Turkey were stopped as part of sanctions against this country after the shot down of the Russian war plane. Serious restrictions were put on Turkish firms working in Russia in the sphere of Russian-Turkish tourism.

These restrictions will be negatively telling upon Russian outbound tourism for quite a long time. Organizing trips alternative to Egypt and Turkey will consume much time and effort. Russian economic problems triggered by the economic crisis and Western sanctions will make the situation even worse.

Table 2: Tourist trips of Russian citizens to 10 leading outbound tourism markets during the period of 2013-2015

Country	2013	2014	9 months of 2015	Change in the country's market share to that of all countries (+, -, %)		The growth (+, -, %) in the number of visiting Russian tourists	
				2014/2013	9 months of 2015/9 months of 2014	2014/2013	9 months of 2015 / 9 months of 2014
Turkey	3079	3278	2429	1,78%	3,33%	6,49%	-20,51%
Egypt	1909	2566	1568	4,13%	2,70%	34,38%	-17,15%
Greece	1176	1016	503	-0,66%	-1,67%	-13,57%	-48,47%
China	1068	766	285	-1,49%	-1,33%	-28,22%	-53,23%
Thailand	1035	934	314	-0,36%	-1,32%	-9,78%	-51,66%
Spain	1013	982	502	0,04%	-1,04%	-3,02%	-43,12%
Finland	905	379	187	-2,79%	-0,15%	-58,08%	-36,62%
Germany	831	820	443	0,11%	0,09%	-1,30%	-29,89%
Italy	726	747	394	0,28%	-0,42%	2,97%	-38,02%
UAE	653	597	240	-0,18%	-0,51%	-8,57%	-43,45%
Total on all countries	18292	17612	9995	0,00%	0,00%	-3,72%	-31,39%

Source: <http://www.russiatourism.ru/contents/statistika/>

At the same time bigger opportunities to develop inner and inbound tourism are appearing. There has been numerous talks about the necessity and some measures to develop Russian national tourism for many years. But only at this time the chance appeared to carry out structural reforms in Russian tourist industry. And in this unique situation they may be very successful.

3. CURRENT TENDENCIES IN THE DEVELOPMENT OF TOURISM IN RUSSIA

Russian tourism is starting to undergo a serious transformation. It is a consequence of several processes which gradually formed the prerequisites for radical structural changes in tourism industry. Post-soviet Russian tourism which was formed towards mid 1990s began operating on market basements. By that time the prominent demand for foreign trips has been formed. The tourist market replied by offering adequate supply.

Outbound tourism has been the hallmark of tourism development in Russia. At that time the travel agents and tour operators dealing with international tourism were the most active and outstanding representatives of Russian tourist industry. Though "the come-between outbound tourism" was prevailing, gradually the awareness grew that the inner tourism is the basement of national tourism, and the inbound tourism is the source of additional investment into the national economy.

The state and businesses were trying to develop national tourism; objective prerequisites for its revival have been accumulating.

The hotel market started reviving after the fall in early 1990s. New Russian hotels, many of which are world-chain ones are offering high-quality services. Following the process in big cities, hotels and other lodging facilities began appearing in Russian regions. The central and regional governments started paying more attention to the development of inner tourism. Strategies and programs of tourist development are being elaborated, cluster approach and the mechanisms of public-private partnership are being used.

Russia has made some achievements in transport machine building. Russian regional aircraft is produced; longer-haul planes are being elaborated as well as the vehicles. Russia and China have announced plans to mutually produce a long-haul aircraft to operate on international airlines. There are projects of building new ships to substitute old ones on river-cruise routes.

Inner trips using different means of transport are growing in number. Air trips are targeting former soviet numbers due to the state support. High-speed railways development program is being carried out.

Interesting to note, that outbound tourism somehow helped the inner one. While travelling abroad Russian citizens got to know the world service standards. From this viewpoint they estimate Russian services. Having satisfied the big demand for international trips many Russians started showing more interest in travelling within their own country. Operating in the world market Russian tourist firms have got a valuable practical business and affairs experience and contacts with their foreign counterparts. It heightens their skills which may be useful in Russian tourist market.

The «critical mass» has been formed for radical changes in Russian national tourism to start. The crisis after 2012 resulting in reduction of Russian outbound tourism triggered off the process of serious transformation of Russian tourist industry.

Nowadays the inner tourism statistics systems are not yet operating well. Several experts estimate Russian inner tourism at 60-70 million per year. In the year 2015 the inner tourism growth reached 30-40%. For the year 2016 the same growth is predicted. The inbound tourism to Russia is also showing growth.

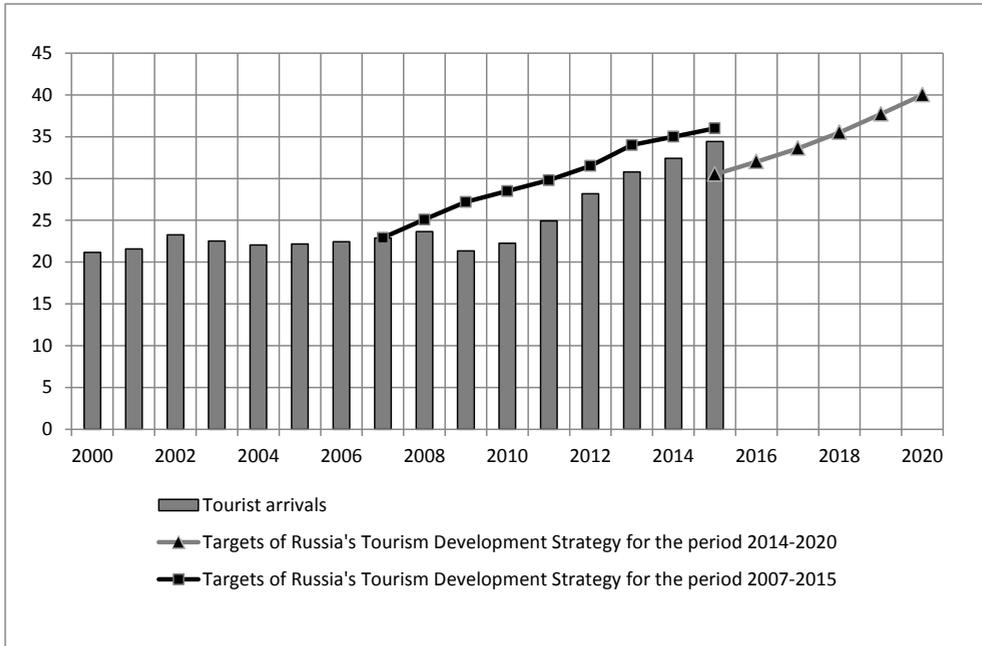
The picture 4 displays the information on the dynamics of foreign visitors to Russia in the years 2006-2015 and the indicative of the Tourism Development Strategies in Russia (until the year 2015 and until the year 2020).

When the data on the whole year of 2015 be obtained we suppose that the total amount of visitors to Russia will reach 34 million almost targeting the till-2015 Strategy's plan for 36 million.

We may admit that the skepticism about the possibility to get 36 million visitors by 2015 was not supported by the real data. The discrepancy between the facts and the goals of the years 2008 and 2009 was gradually leveled off.

These doubts were based on the World crisis events in 2008-2010 and were reflected on the perspective of fulfilling the goals of the till-2015-Strategy and it elaborating goals for the till-2020-Strategy. The new goals appeared to be lower than the previous ones. For example 35 million foreign visitors are expected only in 2018, and 40 million in 2020 (<http://www.russiatourism.ru/contents/otkrytoe-agentstvo/strategiya-razvitiya-turizma-v-rossiyskoy-federatsii-v-period-do-2020-goda-332/>, <http://www.russiatourism.ru/search/>).

Picture 4: Fitting the performance targets of Russia's Tourism Development Strategies till 2015 and till 2020



Source: http://www.russiatourism.ru/contents/otkrytoe_agentstvo/strategiya-razvitiya-turizma-v-rossiyskoy-federatsii-v-period-do-2020-goda-332/, <http://www.russiatourism.ru/search/>

We must admit that in 2010 the World Tourist Organization (UNWTO) was predicting 47,1 million visitors to Russia by the year 2020 which should have comprised 2,7% of the World tourist flow (World Tourism Organization, Seoul, 2011).

Inner, inbound and outbound tourist flows are closely linked. It is especially well seen in crisis years. As a result of the political conflict with the Western countries following the events in the Ukraine there were prohibitions, or recommendations not to go abroad for the representatives of security and other state agencies. It influences the outbound tourism negatively, but the inner one – positively. Political reasons as well as the objective necessity to support the inner tourism lead to the changes in collective treaties concerning the paying for vocations for the employees of big state companies. The compensation for trips expenditures only relates to the inner tourism in Russia. It is one more factor helping the inner Russian tourism.

The 2014-2015 devaluation of Russian ruble due to low prices for natural resources which Russia exports as well as Western sanctions narrowed the opportunities for Russians to travel abroad and reoriented them to travel within the country. At the same time the low ruble rate makes better opportunities for the foreigners to visit Russia and stimulates the inbound tourism.

For the last several years the requirements to act on the outbound tourist market were toughened. The financial provisions for the outbound tour operators are higher than to the inbound ones. Besides that the former should enter the professional association "Turpomosh" ("Tourist assistance") and make additional contribution to the special fund. The conditions of high competition in crisis reality push the firms to involvement in the inner tourist market. Even big international companies which originally appeared in Russia to deal with the outbound tourism have started diversifying their product creating tours to Russian regions.

In the year 2015 such factors as crisis in the Russian air-market, tragic events in Egypt in October, sanctions against Turkish business, further devaluation of ruble made an additional negative impact on the outbound tourist market. But cutting short the outbound tourism inevitably helps the inner one.

Yet the new tendencies should be taken advantage of. Such problems inhibiting the inner and inbound tourism as the underdevelopment and territorial disproportions of the tourist infrastructure, the relatively low level of services quality, excessively high prices on some tourist products, problems with advertising Russia as a popular tourist destination, with the tourist management and enterprising functioning are still there. Nonetheless we can be almost sure of the new period in Russian tourist development.

4. CROATIA AS A DESTINATION FOR RUSSIAN TOURISTS

The Russian inner tourism growth negatively impacts the outbound tourism market. If there is a satisfactory supply inside the country, the demand for similar outer destinations will decrease. To retain the visitors the tourist destination should offer either a unique tourist products or the ones that have better price and quality characteristics.

Table 3 gives the data on Russian trips to Croatia and the neighboring countries.

Table 3: Departures with the purpose of «tourism» of Russian citizens to Croatia and neighboring countries in 2013-2015, thousand

Country	2013	2014	9 months of 2015	Change in the country's market share to that of all countries(+,-, %)		The growth (+,-, %) in the number of visiting Russian tourists	
				2014/2013	9 months of 2015/ 9 months of 2014	2014/2013	9 months of 2015/ 9 months of 2014
Bulgaria	499	498	340	0,10%	0,10%	-0,19%	-29,38%
Austria	273	229	113	-0,19%	-0,12%	-15,97%	-38,04%
Croatia	82	71	40	-0,05%	-0,07%	-13,95%	-41,47%
Hungary	38	59	34	0,13%	0,03%	54,15%	-25,74%
Romania	3	7	7	0,03%	0,03%	159,02%	23,44%
Total on all countries	18 292	17 612	9955	0,00%	0,00%	-3,72%	-31,39%

Source: http://www.cbr.ru/statistics/credit_statistics/bp.pdf

Romania was the only country that did not lose Russian visitors in number. In 2014 Hungary lost 55% to the year 2013 (in 2015 the reduction continued). In 2014 Bulgaria retained the numbers of 2013 but lost in the year 2015. Croatia and Austria face the decline in arrivals from Russia. In 2014 the strongest decline was to Austria – 16%, and in 2015 – to Croatia – 41,5 %. In case it is in Croatia's interests to attract more tourists from Russia, the authorities should be active in promoting the country's tourist product to Russians.

In this regards it would be interesting to mention Russia's experience of accepting Chinese tourists. 1 million of them visit Russia every year bringing 1 billion dollars and their number keeps growing fast. The project «China Friendly» is being realized, its goal is to adapt Russian tourist market to the specific demands of Chinese tourists.

Russia and China have a long border and numerous political, economic, cultural contacts. The relations between these countries were both good and bad at different times. There was a communist period of tense contacts. The interest to Chinese communist past brings about the so called «Red tourism». Red tourism happens both within China and to Russia where Chinese tourists come with numerous purposes of visit including sightseeing connected with the Soviet past.

Croatian government might diversify the tourist supply. Besides traditional relaxed beach tourism on marvelous Croatian coast and islands it might be reasonable to think about promoting the country's national parks and lakes, cultural heritage of different cities and towns, catholic churches and even remember some commonalities of the communist past playing to tune of elderly Russians some of whom still feel nostalgia over those years.

5. CONCLUSION

Different factors of Russian outbound, inner and inbound tourism are described in the article. Russian economy including the tourist market is challenged with a serious economic crisis. As a result of it the number of inner and inbound tourists is growing while that of Russian visitors abroad is ebbing. The Russian government understands the negative impact of outbound tourism on the country's balance of payments and carries out the policy of stimulating inner and inbound tourism.

It was mentioned that the changes in the Russian tourist market are long-term with the far-reaching consequences bringing structural alterations to it. The Russian economic crisis provoked by Western sanctions and low oil and gas prices forces to set counter-sanctions and carry out import-substitution. In the tourist market it appears in the form of government's and businesses' reorientation to the inner and inbound tourist market, some restrictions on outbound tourism. For the countries accepting the falling amount of Russian tourists it means that the competition for the remaining ones will sharpen and serious efforts are needed to promote their destinations, to create new tourist products, which might additionally be of interest to tourists from Russia.

We have noticed the decline in the number of Russian visitors to Croatia. We also see that this fall is even bigger than the decline to the neighboring countries like Austria, etc. The reasons for that were mentioned above. The changes in Croatian authorities and business strategy to stimulate more Russian tourists to the country are needed in case it is in the interests of Croatian society.

DOMAĆI TURIZAM U KONTEKSTU TRANSFORMACIJE RUSKOG TURISTIČKOG TRŽIŠTA

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SAŽETAK

Ruski inozemni turizam poznat je na svjetskom turističkom tržištu. Izvoz turističkih usluga u Rusiju zabranjen je sankcijama za ekonomije mnogih zemalja. U današnje vrijeme prisutne su nove tendencije koje bi trebale radikalno promijeniti strukturu ruskog domaćeg turizma i utjecati na inozemni turizam. Za to postoje vanjski i unutarnji tržišni i politički razlozi. U Rusiji država potiče razvoj domaćeg turizma različitim programima i strategijom njegova razvoja. Poduzetničke aktivnosti, konkurencija, investicija u turizam i turistička infrastruktura također su u porastu. U današnjoj Rusiji vidljiva je promjena od „inozemnog turizma“ prema „domaćem turizmu“. Ovo posljednje donosi dodatne prihode ruskim regijama. Sadašnja ekonomska i politička situacija doprinosi tom procesu. Pad prihoda uzrokovan ekonomskom krizom prisiljava Ruse da manje putuju u inozemstvo, a raste broj putnika u domaće jeftinije destinacije. Suočena s ekonomskim sankcijama ruska državna tijela traže unutrašnje investicije i mogućnosti smanjenja troškova uvoza. Počeli su više pažnje posvećivati domaćem turizmu. Pod sloganom „supstitucija uvoza“ i „protusankcije“ neke restrikcije koje utječu na međunarodni turizam, preferencije prema domaćem turizmu i stimulacija potražnje elaborirane su u ovom radu. Također i restrikcije inozemnog turizma kao i zabrana stranim kompanijama da djeluju na ruskom turističkom tržištu postali su politički faktor. Pad ruskog inozemnog turizma jača konkurenciju među svojim destinacijama, a povezano je i s Republikom Hrvatskom. Broj ruskih turista u Hrvatskoj pada iz godine u godinu. S jedne strane to može imati negativan utjecaj na hrvatsko turističko tržište, a s druge strane može otvoriti nove mogućnosti za pronalaženje načina da se privuče više posjetitelja iz Hrvatske. Smatramo da to može biti u interesu Hrvatske.

Ključne riječi: domaći turizam; inozemni turizam; Hrvatska; Rusija

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