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The Long-term Forecast of the Russian Tourism Development

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ABSTRACT

The article directs at identifying of the main indicators of the long-term forecast of the Russian tourism development. The authors have applied the methods of extrapolation, expert evaluation, and scenarios, enabled the authors to develop a baseline and target scenarios of tourism development in the Kaliningrad region (KR) of Russia. The paper reveals the investigation of macro- and micro-economic factors, affecting the development of tourism in the region today and in the long-term perspective. It also proves the measures that may have the greatest influence on the development of tourism in the region in the next 5-10 years. Presented in the article methodology of building the long-term forecast can be useful not only for the KR and the other Russian regions, but also for foreign countries. Article materials are of practical value to state authorities, Russian and foreign investors in determining the prospects of the tourism development in the KR.

Keywords: Tourism, Kaliningrad Region, The Regional Tourism Product, Development Scenarios, Long-term Forecast
JEL Classifications: O2, R12

1. INTRODUCTION

Nowadays, tourism is an industry of increased attention. Universally, a lot of countries precisely due to the development of tourism have provided the solution of socio-economic problems in the region through the creation of new jobs and tax proceeds to local budgets. This is described in the works of both Russian and foreign researchers, such as: Burton et al. (2006), Goeldner et al. (2000), Heiden (2006), Lynch (2006), Smith (2010), Larionova et al. (2015), Dzhandzhugazova (2013), Frechtling (1999), Ko (2005), Miller (2001), Seonhee (2008), Souty (2003), Bunakov et al. (2015).

In spite of the current situation in the global economy, the research results show that in 2014 the number of international tourist arrivals increased by 4.7% compared with the level of 2013 (equals 1.138 million tourists).Herewith, the aggregate expenditures of the tourists amounted US$1.245 billion, that is, every tourist on the average spent about US$1,100 thousand per the trip. Tourism belongs to the industries that provide services exports - according to data for 2014 tourism accounts for about 30% of world export of services Kropinova et al. (2015).

However, the distinctive feature of the tourism industry is that along with the presence of projects with short payback period, there are quite capital-intensive projects, oriented on the 5-10 years payback period. First of all, it refers to the infrastructure projects, implemented through public-private partnership. Obviously, that elaboration and effective implementation of such projects is not possible without thorough and comprehensive research on the prospects for the tourism development in the certain Russian regions.

The leaders of many Russian regions realize this and, while working out the regional development strategies, take into account the results of scientific researches. However, these studies are not always carried out quite efficiently and objectively. One of the main reasons is the lack of the methodology for such studies. Therefore, the main directions of works for the study of development of the regional tourism and the construction of a long-term (up to 2030)

forecast for the development of tourism in the Kaliningrad region (KR) are as follows. The first results of the present research were reflected in the works of *Kropinova* et al. (2015).

2. METHODOLOGICAL FRAMEWORK

2.1. The Use of the Method of Expert Evaluation in Order to Identify the Main Factors Influencing the Development

In the process of evaluating the impact of various factors on the development of the tourism in the KR we have attracted the experts engaged in research activities in the field of the tourism development in the regions, including KR.

A total number of experts is 14, the structure of which is as follows (Table 1).

According to the Table 1, a larger part of the experts, involved in the process of investigation (50% of the total number) have a scientific degree of Doctor of Science. However, candidates of science also have large experience of research work in the present sphere - 28% of the total number. Employers constitute 22% of the experts.

Moreover, all experts have a practice of the training the staff for the tourism industry, only 22% have <10 years of practice, 33% have more than 20 years, and 45% of the experts have more than 30 years.

When determining the list of experts it has been important to find those who are located outside the KR, but are aware of factors which impact the development of tourism in the KR, and the way in which the tourism in the region can change if certain scenarios are implemented, and planned projects are turned into achievement.

As a result, 72% of the experts who had had an experience in research works on the development of the tourism and hotel business were engaged in the investigation, including 33% of the experts taking part in the research work "Creation of the concept of integrated development of tourism in the KR for 2012-2018/2022, which includes measures for development (restoration, creation) of the tourism infrastructure, a list of available (reconstituted) objects with the reference to the certain touristic zones of the KR" (The Report of the RW No. 47-K/2012 from 26.07.2012, Russian State University of Tourism and Service).The rest 39% have an experience of participation in other research works on the development of the tourism and hotel business in the Russian regions and abroad. Thus, in the preparation of expert's report, they have used the statistics of the other regions practice of the implementation of the similar projects, and studied the additional material on the development of tourism in the KR.

2.2. The Implementation of the Scenario Method for Determination of the Forecast of the Tourism Development in the KR (up to 2015)

Based on all of the above-mentioned results of the method of expert evaluations and factor analysis of the tourism development in the KR, the authors present two scenarios of the situation for the discussion to the scientific community.

1. In implementing the baseline scenari**o**, the authors have used presuppositions that the conditions for the development of the tourism in the KR for the entire forecasted period, as a whole, will correspond to the situation of 2013 (steady growth from 20 to 2013 in 4,5%) with further preservation of positive dynamics, seen in 2015 (20%). Herewith, internal development opportunities will not be fully realized, but in accordance with the latest changes of the socio-economic development of the state, as a whole, and the region, in particular, (reduction in the amount of financing the Federal Targeted Programme [FTP] at the expense of a range of the infrastructure projects, aimed at developing of the tourism directly or indirectly, but with keeping of the key projects - Airport and FIFA-2018 facilities).

Table 1: The structure of the experts, invited to participate in the research on the building of a long-term forecast of development of tourism in the KR

Indicators of the experts structure	Number	5%
Structure of the experts, based on the presence of scientific degree		
Doctor of science	9	50
Candidate of science	5	28
Employers without scientific degree	4	22
Total	18	100
Structure of the experts on the basis of experience of the research in the field of the tourism development in general, and, in particular, in the KR		
Participation in the research work No. 47-K/2012 from 26.07.2012 "Creation of the concept of integrated development of tourism in the KR for 2012-2018/2022, which includes measures for development (restoration, creation) of the tourism infrastructure, a list of available (reconstituted) objects with the reference to the certain touristic zones of the KR"	6	33
Participation in other research on the tourism and hospitality business	7	39
Without any experience of participation in any kind of research	5	28
Total	18	100
Structure of the experts on the basis of work experience in the field of the staff-training for the tourism industry		
More than 20 years	6	33
More than 30 years	8	44
<10 years	4	22
Total	18	100

KR: Kaliningrad region

2. The target scenario involves the improvements of conditions of the tourism development (primarily, increase of appeal of the KR as a center of tourism and recreation of federal and meso-regional (the Baltic region) importance), as well as the implementation of all planned measures, indicated in the program documents of the Regional Ministry of Tourism, as well as in the plans for investors attraction, declared by Tourism Development Corporation of the KR. The framework of this scenario takes into account the realization of the huge (in respect to the scale of the KR) project of the construction of deep-water port in Pionersky city, as indicated in the FTP "Development of the Russian transport system (2010-2020)" that will improve progress of cruise and ferry service between the port of Kaliningrad, St. Petersburg port and the ports of the Baltic Sea.

3. RESULTS

Summing up the characteristics of the experts, involved in the project, it can be concluded that, in general, the experts are well-qualified specialists in the field of research on the tourism development in Russia and abroad, and are aware of the specificity of the KR. Thus, their evaluations can be regarded as reasonable and objective (Table 2).

Thus, on the basis of the expert evaluations of the current situation in the tourism industry of the KR and the possible prospects of its development, the necessary data was obtained for the building of a long-term forecast of the development of tourism in the KR until 2030.In addition, the forecast have taken into consideration the regulations of the strategy of socio-economic development of the KR for the long-term and the State Program of the Russian Federation "Social-economic Development of the KR Until 2020."

The forecast of the development of tourism in the KR has been developing in the context, used by State Statistics Service: Russian tourists, foreign tourists.

As a result of conducted calculations, the following data on the tourist flows was obtained (according to two scenarios) (Figure 1).

In the construction of this forecast the authors' approaches also were used for the calculation of growth rates of the tourists flow in the KR in 2015-2030, taking into account the latest data of the Regional Government. Thus, the report of the Minister of Tourism of the KR Andrey Ermak on "The conceptual fundamentals of the development of the tourism industry in the KR for the period up to 2020," which he presented to the Regional Government at

Table 2: Expert evaluation of changes in the values of indicators, characterizing the development of tourism in the KR, in % relatively to the level of the current year

Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: «Hosting of FIFA-2018 in Kaliningrad»	
The number of foreign tourists	150
The number of operating personnel	244
The number of souvenirs, football accessorizes, amber items	140
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "Change of the terms of the flight to Kaliningrad"	
The number of flights	55
The number of stewards and other operating personnel	31
The number of sold tickets, amber souvenirs, jewelry with the logo of the KR	74
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "Introduction of additional sanctions and/or ban on visiting the foreign resorts"	
The number of Russian tourists	45
The number of operating personnel in the hospitality industry	8
Demand on the hotels and the other accommodation facilities in the KR, and accompying demand on the goods and additional services	13
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "Increase in the width of the beaches of the Baltic Sea coast of the KR"	
The number of vacationists–KR residents	20
The number of staff, engaged in the cleaning of the beaches	55
Demand on the additional goods and services on the beach, as well as amber items (souvenirs)	20
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "Putting into operation of crouse communication as a result of the port development in Pionersk, KR"	
The number of consumers	45
The number of staff at the cruise port	16
Demand on the port call and food staff in the port	100
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "Organization of Amber-Land in Kulikovo"	
The number of Russian and foreign tourists	120
The number of operating personnel	244
Turnover from conducting entertainment events, the sale of goods and services, including the sale of products from amber	200
Please, indicate the possible changes in the values of the following indicators (in annual terms) in the case of occurrence of an event: "The annual holding of KiViN and other large-scale events in the Variety Theatre "Jantar-Hall", Svetlogorsk"	
The number of Russian tourists	5
The number of operating personnel	19
The number of sold tickets, amber souvenirs, jewelry with the logo of the KR	32

KR: Kaliningrad region

13th August 2015, indicated that the average annual increase in the number of tourists in the KR until 2020 will be 14% per year.

In 2010, 2025 and 2030 an additional 3% - increase in the flow of tourists is possible due to the introduction of the cruise communication. At the same time, in the baseline scenario it was considered that despite the increase in the number of tourists in the first half of 2015 to 20%, in the low season there is a possibility of reduction in demand to the planned by the Ministry of Tourism of the KR - 14% p.a. These parameters were taken as a basis for the tempo of growth in the number of tourists in 2015 (Figure 2).

Also, the report of the Minister of Tourism of the KR Andrey Ermak on "The conceptual fundamentals of the development of the tourism industry in the KR for the period up to 2020" (13th August 2015) stated that "in general, Russian tourists constitute a larger part of the tourists flow - 87%, foreign tourists - 13%." The data on the forecast changes in this structure is not exist, so, for the calculations it is taken fixed for two scenarios, with the exception of 2018, when FIFA will take place. According to the expert evaluations, this event can secure a 15% share of foreign tourists in the structure of the tourist flow of the KR (Figure 3).

At the same time, in the calculations of the foreign tourists forecast it was urgent to define the structure of these tourist.For this purpose the authors implemented the latest official data from the website of the Ministry of Tourism of the KR (Table 3).

This structure has been used in the course of the period of the present forecast (Figure 4).

Thus, the performed calculations show that the implementation of the baseline (optimistic) scenario suggested the existence of political will at the level of the local authorities. Moreover, the realization of investment projects, foreseen in this scenario, largely depends on the general economic situation in the country, including the change in the index of consumer price of services, in general and tourism, in particular.

4. DISCUSSIONS

The construction of the forecast of the index of consumer prices of services in the KR.

According to the forecast of the long-term socio-economic development of the Russian Federation for the period up to 2030 (approved in March, 2013), in the 2023-2030 the predicted strengthening of the ruble exchange rate will influence the reduction of the inflation to 2.9% annually. Increase of prices of goods slows down to 2.3-2.5% p.a. on average, which corresponds to the parameters of the price growth in the developed countries.

Since the real situation turned to be different and the tempo of ruble depreciation in several times exceeded the forecast of 2013, the authors took the worst in terms of inflation conservative scenario of development, according to which the annual rate of prices

Figure 1: The forecast of the amount of tourists in the Kaliningrad region in 2015-2030, person

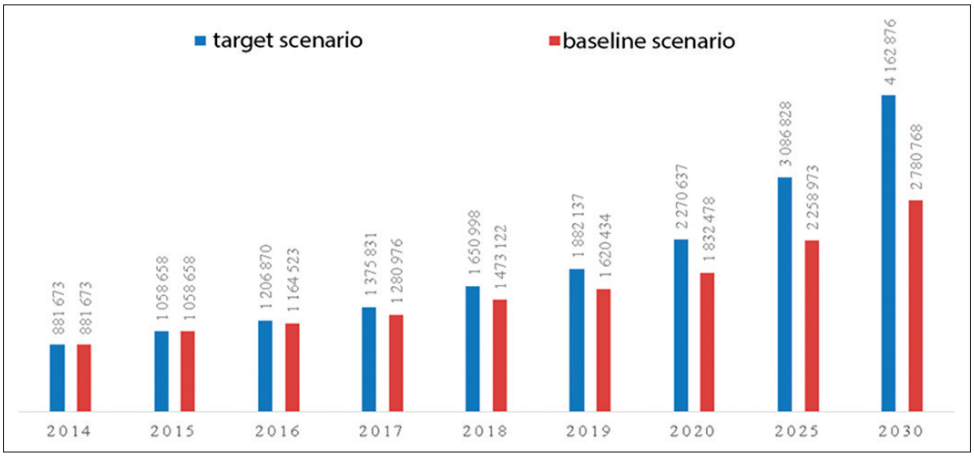

Figure 2: The forecast of the tempo of growth in the number of tourists in the Kaliningrad region in 2015-2030, %

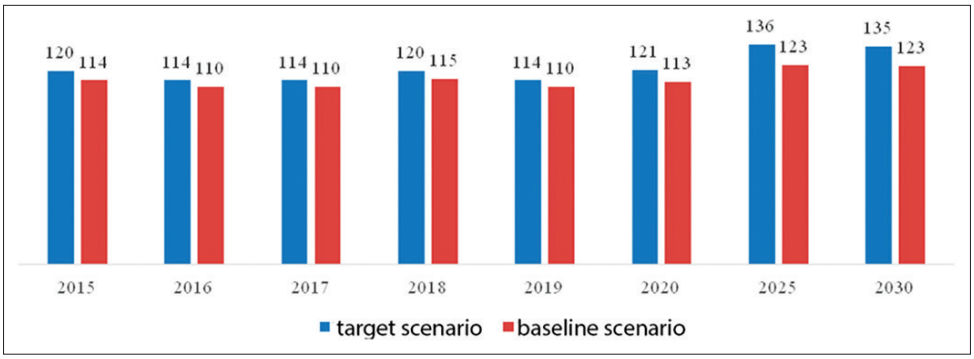

Figure 3: The forecast of the number of Russian and foreign tourists in the Kaliningrad region in 2015-2030, person

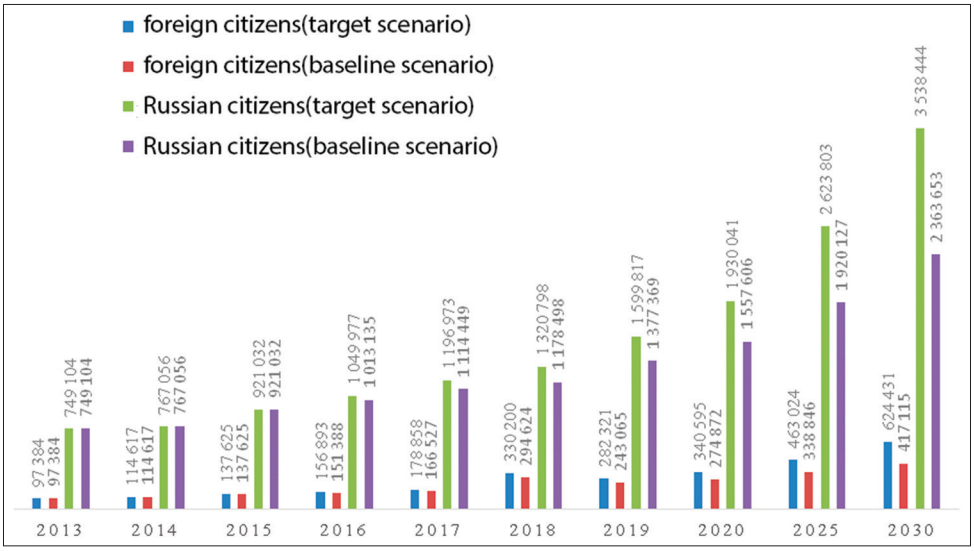

Figure 4: The forecast of the number of foreign tourists in the Kaliningrad region in 2015-2030, (for Commonwealth of Independent States countries, and the rest countries)

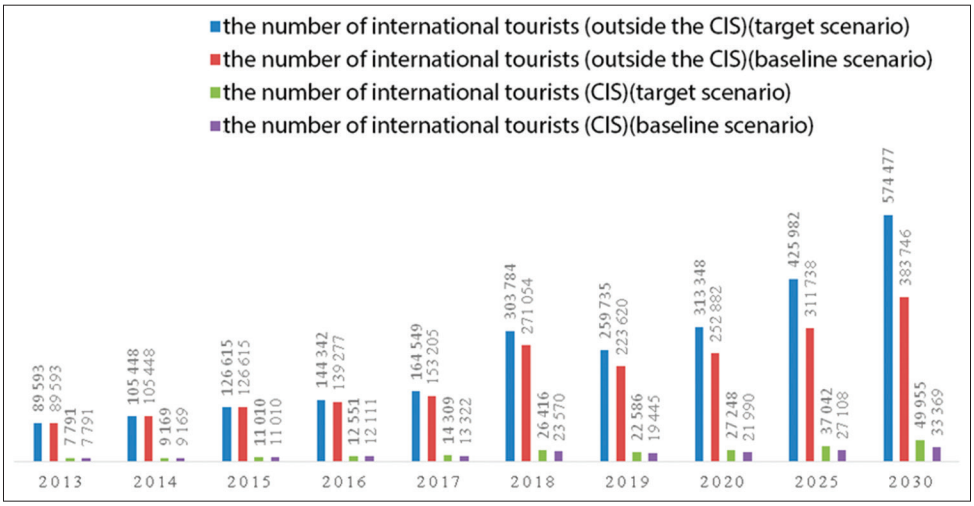

Table 3: The structure of inbound tourism in the KR in 2013, %

Countries, outside the CIS	92
Countries of the CIS	8

CIS: Commonwealth of Independent States, KR: Kaliningrad region

increases of services in 2021-2025 would be 5.4%, 2026-2030 - 4.9%, 2016-2030 - 5.6% (Table 4).

For the period 2023-2030 y.y. this option implies a significant weakening of the exchange rate, which will be made up by a moderate growth in disposable incomes.

In 2015 there was a correction of the forecast of the long-term socio-economic development of the Russian Federation for the period up to 2030, elaborated in 2013. As a result, "Scenery conditions, the basic parameters of the forecast of socio-economic development of the Russian Federation and the overall price levels (tariffs) of services of the infrastructure sector companies for 2016 and the planning period of 2017-2018 years" were prepared. They contain the other values of Consumer Price Index (CPI) for 2017 and later years (Table 5).

The present document notes that by the end of 2015, inflation will decline to 11.6-11.9% (11.9% - the baseline case, 11.6% - the second case, at a steady rate of the ruble). On the average p.a., inflation will not exceed 15.5-15.7% of the previous year (in the previous version of the forecast 15.8%). The main contribution to the inflation in 2015 will be brought by the outpacing price growth of food in the first half of the year, conditioned by the devaluation of the ruble in late 2014 - early 2015, the continuing effect of food contra-sanctions and, as a consequence, - increase in prices of raw materials and processors and distribution channels costs. The market of non-food products depends on imports to a greater degree than the food market (the share of imports in the turnover of non-food items makes up more than two-thirds), but the potential of the price growth here is lower. In 2015, the growth in the prices of products of this group will be lower than of food, under the strong pressure of reduction in the population solvency and cut-back in consumer credits. At that, in the course of the

year there will be a change of the structure of imports in favor of cheaper products of the economy class. A similar situation will be observed in the service market, where the increase in the prices in 2015 remains behind inflation due to the strongest reaction of this sector on reduction in the solvency of the population. The effect of exchange rate dynamics on the prices growth tempo in the present sector of the consumer market is weaker than on goods. However, the growth in prices in this sector will be conditioned by the secondary effects as a result of increased inflation, especially in the scarce sectors, with steady demand (education, pre-school education, medicine, etc.). Thus, it is necessary to pay attention to the risk of substitution of discretionary expenditure on holiday by more important in a crisis - costs on children's education, medicine and food.

Consequently, due to the high inflation, linked with the increase in prices of food in 2015, the CPI of services has turned to be lower than of the national economy as a whole (10% of services against 11.9% for the whole economy, outpacing growth of CPI of services compared to the general index of inflation on 0.4-0.8%).

Comparing the data on the tempo of inflation for services in Table 1 with the consensus-forecast in Figure 1, it is seen that consensus forecast provides unrealistically low for the services sector values of the CPI: In 2010-4.9%, on conditions that in relatively prosperous early 2013 the forecast predicted 6.4% value for Russia.

Therefore, the authors of the present article for the calculation of the baseline scenario adopted the baseline scenario of the CPI changes in the KR for the period until 2019 (the data of Picture 1), in 2020 - the CPI values from the long-term socio-economic development of the Russian Federation for the period up to 2030, that is 7.0%, further, they used the data from the present forecast, i.e., CPI in 2020 - 5.4%, in 2030 - 4.9%.

As the initial data for the target scenario for 2015-2018 years, the authors have taken the data "Scenery conditions, the basic parameters of the forecast of socio-economic development of the Russian Federation and the overall price levels (tariffs) of services of the infrastructure sector companies for 2016 and the planning period of 2017-2018 years" (Table 2). For 2019-2013 the authors have used the data from the forecast of the long-term socio-economic development of the Russian Federation for the period up to 2030 (approved in March, 2013), as there is a high probability of the correction of the current plans in accordance with the previously developed forecasts of socio-economic development of the Russian Federation and the output to these parameters after overcoming the crisis in the Russian economy. The data from the innovative scenario of the forecast of the long-term socio-economic development of the Russian Federation for the period up to 2030 has been implemented for the calculations on 2019-2030, i.e., CPI of services in 2019 - 4.8%, in 2020 - 4.4%, 2015 - 4.0% and in 2030 - 4.4% (Table 6).

Graphically this data is presented on the Figure 5.

It should be considered that the probability of this forecast depends on many factors.

Table 4: The forecast of inflation (growth in the prices, in %, on average p.a.)

Indicators	2012-2015 y.y.	2016-2030 y.y.			2016-2030 y.y.
		2016-2020 y.y.	2021-2025 y.y.	2026-2030 y.y.	
Inflation (CPI)	5.5	5.0	3.9	2.7	3.8
Services	7.0	6.4	5.4	4.9	5.6

CPI: Consumer Price Index

5. CONCLUSION

The risks, impacting the possibility of the above-mentioned forecasts realization. As it is noted in the "Scenery conditions, the basic parameters of the forecast of socio-economic development of the Russian Federation and the overall price levels (tariffs) of services of the infrastructure sector companies for 2016 and the planning period of 2017-2018 years," the risks of the failure of the inflation target parameters are high. This is one of the main internal risks of the forecast, as; recently, deterioration of the inflation trend outstrips forecasts.

Demography and workforce risks should also be taken into consideration. The main risks of the socio-economic development in the predicted forecasted period, specified by demographical factor, are connected with the reduction in the number of population of working age. Such tendency will continue up to 2027 year.

The losses of most demanded and productive category of labor resources in the Russian Federation can reach 2.6 million people by 2018 and 5.7 million by 2027.As a percentage of the average number of employees in 2014, these losses will amount 3.1 and 6.7% respectively. Such wide scale reduction in the number of population of working age, under unfavorable development of the situation in the sphere of modernization and technological re-equipment of production, may lead to the labor resources deficit. The overcoming of possible staff shortage requires a substantial growth of both public and private investments, aimed at improving the working efficiency. But it supposes not just the modernization of technical and technological bases of production, but also the improvement of its organization, aimed at increasing the intensity of labor, more rational use of working hours, and employees' motivation for high performance. Partly,

Table 5: The forecast of inflation (growth in the prices, in %, on average p.a.)

Indicators	June 2015 y.	December 2015 y.	December 2016 y.	December 2017 y.	December 2018 y.
Inflation (CPI)	16.5	11.9	7.0	6.3	5.1
Services	13.2	10.0	7.8	6.7	5.7

CPI: Consumer Price Index

Figure 5: The forecast of Consumer Price Index in the Kaliningrad region for the period from 2015 to 2030 y.y. (% from annual growth)

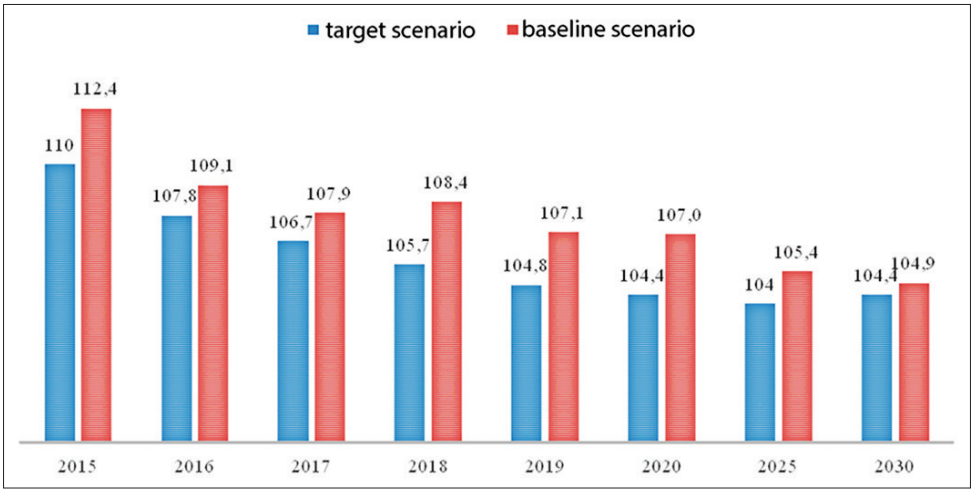

Table 6: The forecast of CPI in the KR for the period from 2015 to 2030 y.y.,%

CPI	2015	2016	2017	2018	2019	2020	2025	2030
Target scenario	110.0	107.8	106.7	105.7	104.8	104.4	104.0	104.4
Baseline scenario	112.4	109.1	107.9	108.4	107.1	107.0	105.4	104.9

CPI: Consumer Price Index, KR: Kaliningrad region

the deficit of labor resources can be offset by the expense of increasing economic activity. However, this direction has a very limited potential.

We should also note the risks associated with the growth of population older than working age, and, hence, the demographic stress. The peak of demographic stress falls at 2027.The number of disabled citizens per 1000 persons of working age may grow up to this period by 180 persons or 25.8%, which will increase the load on the social sector of the economy and especially in the field of health care and pensions.

At the same time, as it was noted in the very beginning of the analysis on the factors on internal environment, in the KR this problem may be successfully solved by means of employment of the KR residents which fall under the dismissal in other sectors as a result of the expiry date of customs preferences in the territory given by the Special economic zone regime (the so-called "Problem 2016" in the KR).

6. RECOMMENDATIONS

As a result of research, it is possible to give recommendations to the representatives of the tourism business, that, unfortunately, the tourism industry is largely dependent on the dynamics of consumer behavior, inflation tempo and changes in real incomes of the population. It is quite obvious, that in the near future this tendency will be negative both for Russia and Europe. At the same time, the long-term forecast, made by the authors, shows that the dynamics of the tourist flow nevertheless will ensure the increase in revenues of the regional budget and private investors from the tourism development in the KR. This industry will be showing not high, but steady tempo of growth.

All this testifies to the fact that the tourism industry in the most western region of Russia is an attractive investment destination for both Russian and European investors. For the federal and regional authorities it should become a priority direction for investments of public funds.

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