

TENDENCIES AND PROSPECTS OF DEVELOPMENT OF THE TOURISM INDUSTRY IN THE WORLD, THE RUSSIAN FEDERATION AND THE BELGOROD REGION

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Abstract: *Tourism as social and economic phenomenon significantly influences the economic development of the state. At the same time, it acts as an indicator, reflecting the degree of development of the economy, interacting with the enterprises of socio-cultural sphere, transport sector, hotel business and health resort complex. The article reviewed the status of the tourism industry in the world, the Russian Federation and the Belgorod region, identified trends of development. The analysis allows to forecast inbound and outbound tourism flows with the aim of identifying promising areas for development of competitive advantages of tourism and enhance the efficiency of the regional economy. The competitiveness of tourism is highly relevant because it is closely connected with improving the quality of living standards. The development of competitive advantages in tourism is one of the most important factors contributing to the improvement of the regional economy and the formation of new socially-oriented economy.*

Keywords: *tourism, international tourism, tourism development in the Russian Federation, regional tourism, domestic and inbound tourism, industry development prospects, competitiveness, competitive advantages.*

1. INTRODUCTION

In the conditions of the world financial crisis the sustainable development is characteristic practically only of a tourist industry. This fact should be considered to improve the efficiency of the economy.

Processes of globalization demonstrate that tourism as the direction of international trade in services is an integral element of civilized social development. The international tourist market acts as a powerful factor of social and economic development of the country, providing stimulation of inflows of foreign revenue, the population employment increase, their

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welfare and expansion of interpersonal contacts. The increase in international relations solves the problem of cultural and historical monuments preservation, natural heritage, leads to the opening of new areas, influencing the diversification of the structure of the economy. As the development accelerator the tourist industry, due to high multiplicative effect, influences the transport and communication systems, spheres of agricultural industry and trade.

From social point of view, tourism has a strong influence on the regions, which is manifested in the increase in cash flow to the region, the emergence of new workplaces, increase in the fiscal duties, development of communication systems, increase of culture and literacy of local population, etc. These circumstances determine the importance of studying this direction.

2. METHOD

In the process of analysis of the state and trends of the tourism industry a number of methods were used. In order to define prospects of tourist flows' development, the study forecasts of amount of these flows. At the same time the study uses methods of the correlation and regression analysis and constructs a linear, logarithmic, sedate and exponential trends:

- the linear function reflects the trend of changes under the action of a variety of different factors, varying in different ways according to different patterns;
- logarithmic function describes tendencies of the restraining increase in levels in the absence of the maximum value;
- the sedate function shows change of levels of a row on condition of continuous acceleration;
- exponential function means a tendency of the accelerating or slowing growth of levels of a dynamic row [13]. Using trend time series models (describing the basic pattern of movement in time) for the prediction of economic indicators supposes keeping the cumulative effect of factors acting for a long or short period of time.

The use of the correlation coefficient determines the nature of the relationship. Evaluation of correlation of available parameters is carried out using the coefficient of determination, the ideal value of which corresponds to 1.

Forecasting is carried out until 2025, taking into account pessimistic and optimistic scenario.

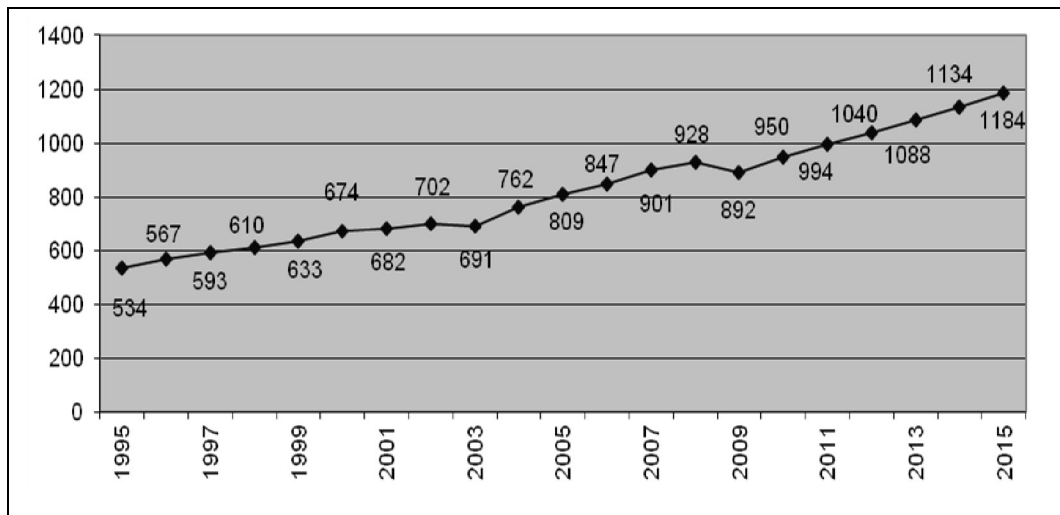
3. RESULTS

3.1 International development of tourism

The level of international tourism development depends on the impact of many economic and social factors, for example, the population's income growth, tourist formalities enhancement (complexity of foreign passports registration, visas, customs rules, currency exchange control, currency exchange, health regulations, matters of entrance, departure, stay and movement), level of transport servicing increase, prolongation of the holiday, interstate cooperation development, etc.

The analysis of the UNWTO data for 2015 demonstrates that the international tourist arrivals number has increased by 4,4% or 50 million tourists, having made 1184 million people, reflecting their steady increase within the last 20 years (figure 1) [4, 5, 10, 12].

Figure 1: International tourist arrivals, 1995 - 2015, million people



In the period analyzed, the demand in the market of tourist services was quite high. However, the results of the tourist areas seem ambiguous, because of drastic currency fluctuations, falling commodity prices, including oil price, growing concerns about the safety and security of the people. International tourism accounts for about 7% of total world exports (increase compared by 1% compared to 2014), behind such industries as the fuel and chemical industries, and 30% of export of services.

Overall assessment of the status and prospects of development allowed to identify trends that are characteristic of the international market of tourism:

- the possibility of diversification of a tourist product;
- the regionalism characterizing production of tourist services with the smallest costs in the place of their consumption;
- the development of domestic tourism;
- the increase in number of tourists of the “third” age (60 years and older) and the services consumed by them;
- the development of the new tourist directions;
- the polarization of tourist preferences – development of mass and individual types of tourism;
- the implementation of advertizing of tourist opportunities, for increase in internal and entrance flows and growth of receipts in national economy.

3.2. The development of tourism in the Russian Federation

The Russian Federation has a sufficient number of regions with a high tourist potential. However, its implementation is fully constrained by a number of problems inherent in almost every subject related to the problems of infrastructure and personnel, system of marketing of territories and their advances, questions of business and legislative base.

Now crisis which should be considered not only as a barrier, but also as the incentive providing creation of favorable opportunities acts as the basic restrictive element of the industry of tourism. Development of the sphere of tourism is of priority for economic development.

Stimulation of development of tourist infrastructure is carried out within the federal target program “Development of domestic and inbound tourism in the Russian Federation (2011 - 2018)” and a state program of the Russian Federation “Development of Culture and Tourism” for 2013 - 2020 [1, 2].

The existing social and economic conditions provide active participation of the state on a basis:

- assistance and creating favorable conditions of development of the tourism industry;
- determination and maintenance of the priority directions of tourist activities;
- forming of a positive image about the Russian Federation concerning tourism;

- implementation of support and protection of subjects of the tourist industry (tourists, tour operators, travel agents and their associations).

At the same time the paramount questions affecting state regulation in tourism concern providing the rights of citizens to recreation, protection of the natural environment, creating favorable conditions for the upbringing, education and improvement of tourists, development of the tourism industry, creation of additional workplaces, increase in the income, etc.

The priority direction of development of tourism is stimulation of internal and entrance tourism, and also social and amateur tourism [11].

Nevertheless, lack of effective system of the market relations, insufficient quality level of service, contemporary technologies, feasibility of maintenance of safety and availability of objects of natural and cultural heritage is characteristic of the tourist industry of Russia.

On the basis of statistics provided by the Federal state statistics service and the Russian Union of travel industry, it has become possible to carry out forecasting of development of the tourism industry in Russia taking into account the prevailing trends and patterns, namely, inbound and outbound tourist flows.

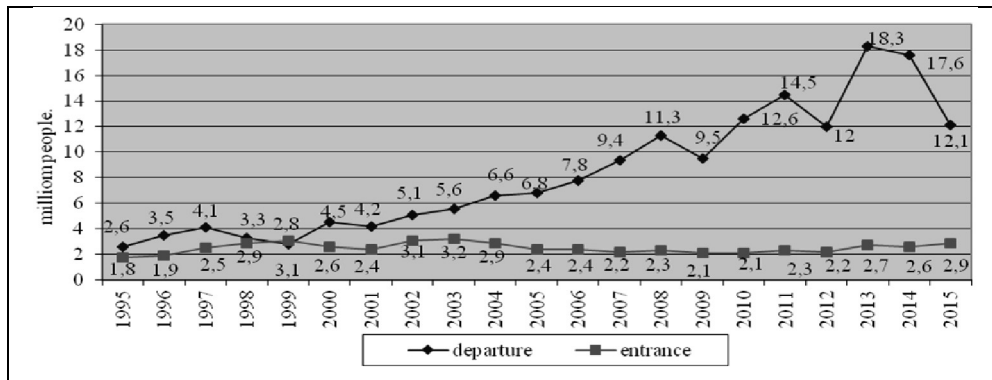
Currently, there is a reduction in the number of emigrants from Russia regardless of the purposes of travelling. The total travel of Russian citizens has decreased in comparison with the year 2014 by 20%, amounting to 36.8 million visits. In 2014 compared with 2013 the decrease in total departure was also significant - 15%.

Nevertheless, in the analyzed period growth of departure of the Russian citizens for the purpose of rest up to 2013 is observed, which is a result of tours being sold at low prices and fierce competition between producers.

Subsequently, the general decrease in a consumer capability of Russians and growth of cost of tourist's packets have led to a reducing demand for the mass directions. Decrease in departure of the Russian citizens in 2014 and 2015 to 17,6 million and 12,1 million arrivals is respectively also caused by growth of the currency rates, change of preferences and tastes of tourists concerning domestic resorts, closing of a number of the tourist directions. At the same time in 2015 decreased by 31,3% that was the biggest decrease in tourist departure (the similar situation was in 1998 when decrease has constituted 24,4%) [8].

Entrance of foreign citizens is characterized by essential growth. Generally it has been caused by private trips – their total amount from 1995 to 2015 has increased more than by 3 times from 10,3 million to 33,7 million arrivals. Significant increase in the driven foreigners is characteristic in the sphere of private trips from 3,9 million to 20,9 million people. It has become possible thanks to the balanced policy aimed at formation of a favorable image of the country [9].

Figure 2: Dynamics of outbound and inbound tourist flows of the Russian Federation in 1995-2015 years, million people



The results of evaluation of the dynamics and trends of tourist flows reflect the orientation of the Russian tourist market for the most part to leave (figure 2). It can be considered a positive aspect of reducing visiting tourist flows and growing entry in recent years.

Trending dynamics of tourist flows has made it possible to identify closeness of the connection between the analyzed factors (figure 3 - 6).

Figure 3: The linear form of the trend

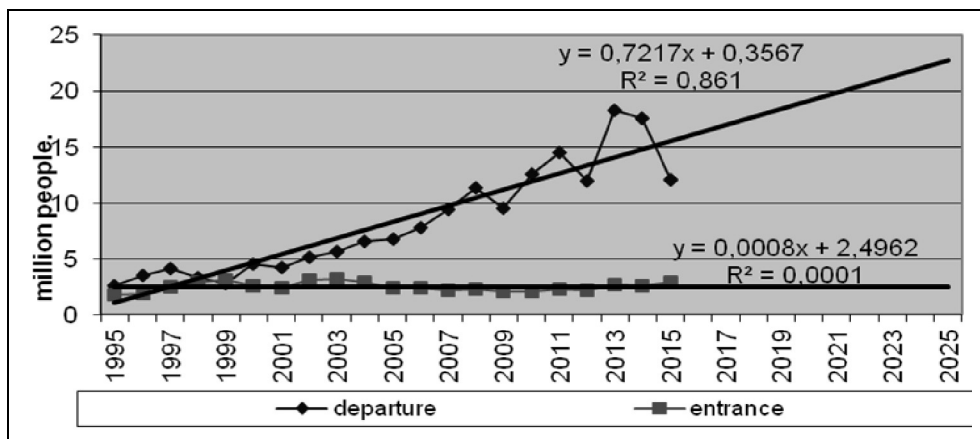


Figure 4: The logarithmic form of the trend

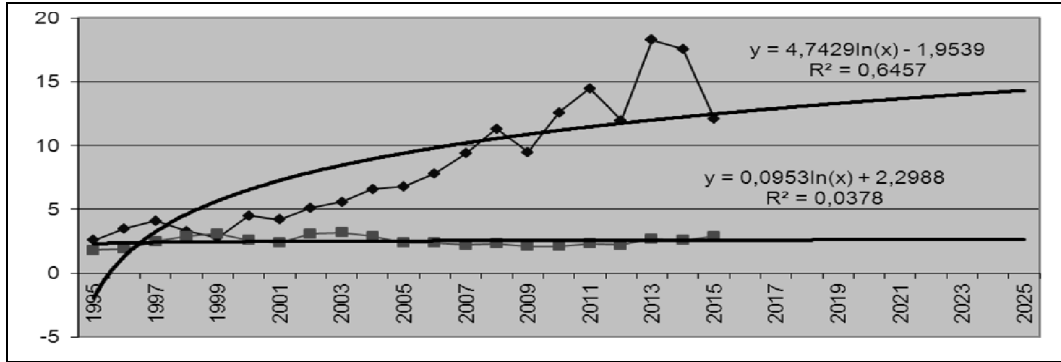


Figure 5: The sedate form of the trend

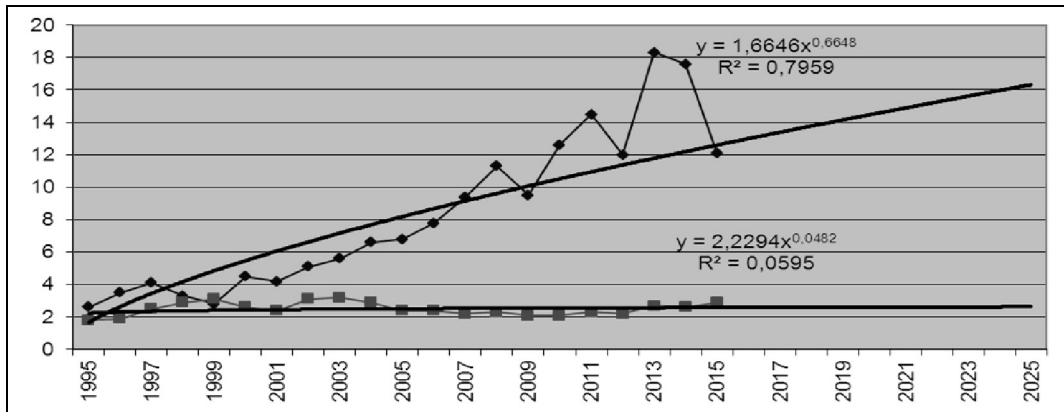
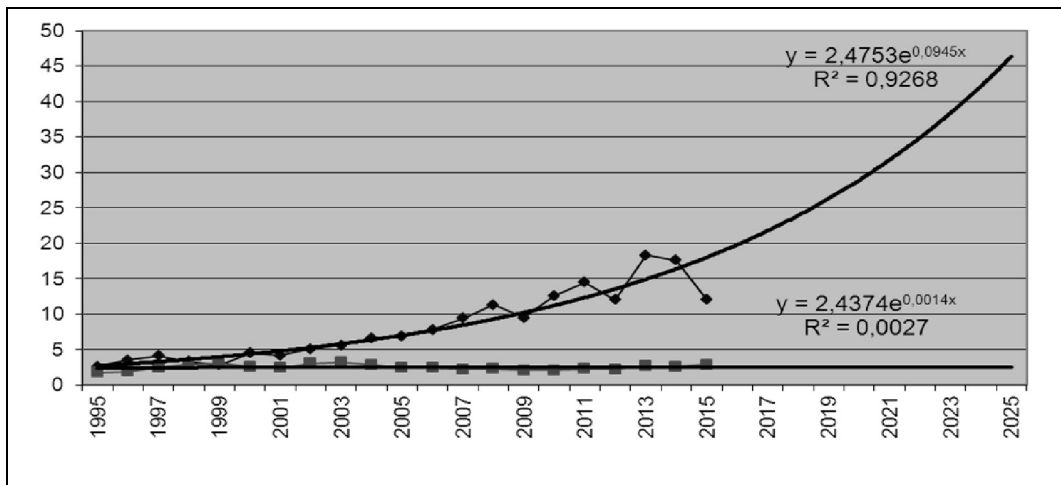


Figure 6: The exponential form of the trend



When considering departure of citizens of the Russian Federation for the purpose of tourism, the best option is characterized by the exponential form of a trend since the coefficient of determination is equal to 0,9268. In this case it can act as a pessimistic option of development because departure of domestic tourists leads to capital outflow.

The values characterizing entry of foreign tourists into the Russian Federation have shown that the largest size of coefficient of determination belongs to a sedate form of a trend (0,0595), however the correlation is not so clear. Development of entrance tourism in the way predicted by means of a linear trend demonstrates pessimistic development of this direction [7].

The available data served as the basis for calculating the forecast values of tourist flows for 2016 – 2025 years (table 1).

Table 1.
The forecast of tourist flows of citizens in 2016 - 2025, million arrivals

Direction of a tourist stream	<i>At the end of the year</i>									
	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
departure	16,23	16,96	17,68	18,40	19,12	19,84	20,56	21,29	22,01	22,73
entrance	2,513	2,514	2,515	2,516	2,516	2,517	2,518	2,519	2,520	2,520

The forecast of tourist flows of citizens in 2016 - 2025 reflects growth in departures of tourists (up to 22,73 million people) and the reduction of arrivals in comparison with 2015 (up to 2,520 million people).

Despite the positive tendency of exit flows and growth entrance flows of tourists, the carried-out calculations reflect the possible growth of departure of the Russian citizens for the purpose of tourism abroad and decrease in a flow of foreign tourists. It will lead to control of development of internal and entrance tourism, such as reducing workplaces and the range of the provided services, decrease in the professional training level of personnel, reducing business activity and investment appeal, reduction of tax revenues.

Studying tendencies and regularities of development of entrance tourism is accompanied by studying of a number of constraining matters.

First, domestic tour operators as the main problem in servicing of foreign tourists note high internal prices which also interfere with development of internal tourism. The high cost of travel in Russia is caused by expensive

transport servicing. In some cases journey on the rail transport-exceeds flight cost of internal airlines.

Secondly, the lack of comfortable tourist information environment also serves as the problem of entrance tourism. Special attention should be paid to the information on the objects of tourist display, the absence of the possibility of pre-booking and buying tickets to museums.

Thirdly, also to category of the problems connected with growth of an entrance tourist stream it should be noted the insufficient number of available hotels and similar accommodation facilities.

Consideration of geography of entrance tourism demonstrates indisputable leadership of such traditional tourist centers as Moscow, St. Petersburg, Kazan and the cities of the Golden Ring. Recently natural sights of Baikal, Siberia and the Far East have been widely adopted. Holding large sporting events (the XXII Olympic winter Games and the XI Paralympic winter Games of 2014 in Sochi, the XXVII World summer Universiade of 2013 in Kazan) has in turn exerted positive impact on development of tourism in the Russian Federation. The forthcoming carrying out the Confederations Cup of FIFA of 2017, the FIFA World Cup of 2018 and the XXIX World winter Universiade of 2019 in Krasnoyarsk will exert positive impact on development of image of the country.

Special attention is deserved by the implementation of a number of the projects providing promotion of the Russian Federation as the tourist direction in the international and internal tourist markets, providing the complex of actions directed to display of tourist opportunities, such as participation in the largest international tourist exhibitions and presentation of advertising and information products, the development of Internet portals, implementation of international events.

3.3 The tourism industry in the Belgorod region

In order to create favorable conditions for the development of domestic and inbound tourism in the Belgorod region, meet the needs of residents of the area and quality of available tourism services and building modern infrastructure approved a long-term target program "Development of domestic and inbound tourism in the Belgorod region in 2013 - 2017 years" was approved, in which incoming and domestic tourism, promoting the development of tourism and creation of tourist infrastructure are chosen as the priority direction [3].

The Belgorod region is the most important industrial and agricultural region of the Russian Federation having an advantageous geographical position. A variety of historical heritage, high intellectual and cultural potential determine favorable long-term prospects of development of a tourist complex in the territory of the region. The available tourist resources are provided by the rich cultural heritage, the unique nature developed by systems of transport connection, communication and telecommunications, the modern international airport. In the Belgorod region there are 2 memorial estates – “Belogorie” and “The Field of Prokhorovka”, one park of regional value “Klyuchi” with ethno-village “Kostroma”, health centres and sanatoriums, well-developed network of cultural institutions, physical culture and sports.

At present, tourism is not well developed to have much impact on the economy of the Belgorod region. According to statistics, the majority of visitors to the region see it primarily as a transit entity, and only then as a tourist center. 50.1% of the total number of guests visiting the region for business and professional purposes and only 35.3% see it as a potential area of leisure and recreation.

During the period from 2010 to 2014 in the Belgorod region a slight increase from 1.0% to 1.2% in the share of income from tourism in the total volume of paid services was observed (table 2). According to this indicator the region in 2014 ranks third, behind Lipetsk and Kursk regions among the regions of Central black earth Region.

Table 2.
The share of tourism revenues in the total volume of paid services, %

<i>Region</i>	<i>2010</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
Belgorod region	1,0	1,1	1,1	1,2	1,2
Voronezh region	0,4	0,4	0,6	0,7	0,8
Kursk region	1,2	1,6	1,7	1,7	1,7
Lipetsk region	2,0	1,9	2,1	2,3	2,0
Tambov region	0,9	1,0	1,0	0,9	1,0

Currently, the Belgorod region has been actively developing rural tourism. In 2014, the region was visited by about 40 thousand tourists - 8 thousand of them rested in the estates and farmsteads.

At the same time the major factors hindering the development of domestic and inbound tourism are:

- undeveloped tourist infrastructure – insufficient quantity of hotel accommodation facilities for the visitors, lack of a network of small hotels, shortage of the transport park drying tourist groups, insufficient development of system of the fast-food establishments oriented to preparation of dishes of a local cuisine;
- lack of positive tourist image of the Belgorod region at the level of the Russian Federation;
- dissociation and inconsistency of actions of subjects of tourist business;
- lack of advertizing of tourist opportunities of area, both in the territory of the area, and at the level of the Russian Federation, as the potential tourist region;
- insufficient regional and state investment into the sphere of tourism;
- lack of tourist product promoting recognition of area.

4. DISCUSSION

Improving the social and economic importance of the sphere of tourism necessitates the search of new opportunities for its development. Improving the competitiveness of the industry of tourism of the Belgorod region on the basis of the available tourist potential taking into account the regional opportunities caused by climatic, cultural and economic features will promote improvement of quality of life of the population in the region.

Using available tourist and recreational resources will provide a possibility of forming various tourist products oriented on different target segments of consumers (both residents and visitors of the region), allowing to get acquainted with historical past, places of military glory, life and work of famous people of the region.

In this context, the region promotion as a tourist destination, improvement of quality of a tourist product is possible on the basis modern information technologies. This direction is a very important and perspective part of development of tourist and recreational complex and creation of a tourist image of the territory.

5. FINDINGS

As the main actions for development of competitive advantages of the sphere of tourism of the Belgorod region for increase of efficiency of regional economy there can be a development and deployment of uniform tourist space of the region, and also effective organizational and financial mechanisms of its introduction and use.

The region has the sufficient tourist potential for creation of uniform tourist space. At the same time the existing websites (“A tourist portal of the city of Belgorod”, “Steps across Belgorod”) doesn’t meet requirements of subjects of tourist activity. Nevertheless, the main attention during creation of uniform regional tourist space should be paid to allocation of its various types (for example, natural, archaeological, ethnographic, military and historical, excursion, service, recreational, event, etc.) within which tourist objects in the form of a short characteristic or a complete description will be presented.

Development of domestic and inbound tourism will ensure the development of a competitive and profitable industry, which can be a catalyst for economic development of the Russian Federation and the Belgorod region, which is especially important in the current socio-economic conditions.

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