

Russian Federation

Tourism in the economy

A detailed calculation on the value of tourism to the Russian economy has been undertaken by the Federal State Statistical Service, using internationally agreed methodologies. This revealed that the share of Russian GDP attributable to tourism rose from 3% in 2011 to 3.5% in 2014. Furthermore, in 2016, tourism is estimated to have directly employed 508 228 people, up 20.4% on the previous year.

In 2016 the tourist industry in Russia finally recovered from the shocks of 2014-15, stemming from the overall national and global economic situation, and the bankruptcy of several major tour operators and the second largest air carrier.

Domestic tourism is significant in Russia and with a strong orientation towards wellness-medical, historical, and religious tourism, while inbound tourism is mainly driven by cultural-historic themes and events. Domestic tourism in 2016 experienced a growth of 10.4% in overnight trips to 48.2 million, compared to 43.7 million the previous year. High levels of early bookings in many popular destinations resulted in high accommodation occupancy rates. In 2016, 24.6 million overnight international arrivals were recorded (down 8.5%), with the two largest markets being China and Germany.

In 2016, international departures decreased by 7.9% to 31.7 million, compared to 34.4 million in the previous year.

Tourism governance and funding

The main executive body at the federal level is the Federal Tourism Agency (Rosturizm), which is under the jurisdiction of the Ministry of Culture of the Russian Federation. The Agency comprises five offices, covering: state tourism projects and tourism security; legal matters; international co-operation; internal tourism and target programmes; and general affairs.

Examples of the Agency's activities include: regular provision of information on tourism; legal changes and regulations; measures to support the improvement of the industry; and registration of tour operators.

The National Tourist Marketing Centre (FSUE) and the National Tourism Development Corporation fall under the jurisdiction of Rosturizm.

A Coordination Council was created for the Federal Target Programme (FTP) for the Development of Domestic and Inbound Tourism 2011-18. This includes representatives of the Ministry of Culture, Rosturizm, the Chamber of Industry and Commerce, the Public Chamber and other associations, the Ministry of Agriculture, the Ministry of Sport, the State Duma, the Council of the Federation, and the Ministry of Economic Development. The

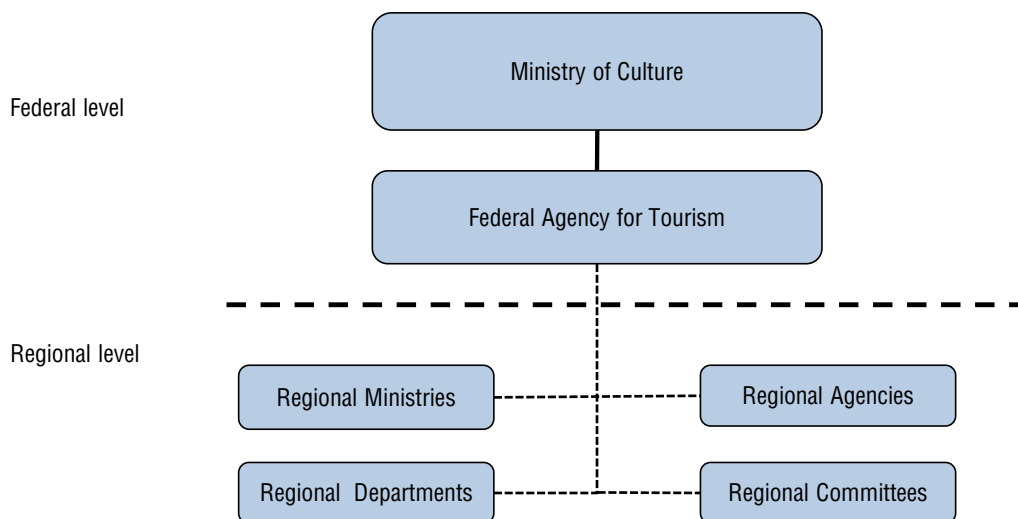
Council facilitates coordination and co-operation with various agencies and interested parties, including associations, experts and state enterprises.

Different powers for the implementation of tourism are vested in the federal authorities and constituent entities, which operate below the federal level. The powers of the constituent entities cover matters such as participation in tourism development programmes, professional training, international activities and research. Local bodies in the field of tourism also have powers in these areas as well as in promoting access to tourism resources, participating in activities at different levels and the creation and functioning of tourist information centres.

Rosturizm has no territorial bodies. The constituent entities fall under a variety of ministries and agencies, which vary between the different republics and cities. Interaction with Rosturizm depends on information exchange and the work of coordination councils and working groups.

In accordance with the State Programme “Development of culture and tourism for 2013-2020”, the total federal budget appropriated for tourism development activities is RUB 3.6 billion.

Russian Federation: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Culture, 2018.

Tourism policies and programmes

In the FTP for the Development of internal and inbound tourism in the Russian Federation (2011-2018), the following factors were identified as constraining increased competitiveness:

- Weak or absent infrastructure, as an obstacle for attracting private investment,
- Poor condition of tourism infrastructure in many locations,
- Lack of long-term credit instruments available to investors, with interest rates acting as a disincentive for investment in tourism and recreation,
- Low quality of services in the tourism industry due to lack of professional personnel,
- Insufficient promotion of tourist products in world markets.

Additional current trends identified in the strategy to 2020 include:

- Growth in tourist arrivals from countries with an unstable political situation,
- Growth in outbound tourism from Russia, partly as a result of more relaxed visa regimes in recipient countries, presenting a challenge for domestic tourism,
- Global growth in demand for nature tourism, presenting an opportunity for Russia due to its wealth of natural assets.

Priorities identified in the FTP for Tourism 2011-2018 include:

- Development of the tourism and recreational product,
- Increase in the quality of tourism services,
- Promotion of the tourist product to international and internal markets.

The State Programme for the Development of culture and tourism for 2013-2020 identifies a range of national priorities for tourism:

- Preserving the cultural and historical heritage of people,
- Ensuring access by citizens to cultural values and participation in cultural life,
- Implementing the creative potential of the nation,
- Increasing the quality and accessibility of services in the field of domestic and international tourism,
- Creating favourable conditions for sustainable development of culture and tourism.

The following measures are being taken in response to the priorities:

- Capital construction and modernisation of tourism products and infrastructure,
- Research and assessment of tourist potential of the regions to identify priority projects,
- Creation and implementation of territorial plans for tourism, with constituent entities,
- Development of a tailored system of training for the tourism and hospitality sector,
- Development of conditions for effective activities by self-regulating organisations,
- Implementation of the use of innovative technologies in tourism development and in the management of quality of tourist services,
- Execution of information and promotion campaigns, including advertising on TV, in electronic mass media and press, as well as outdoor advertising, execution of press-tours and supporting the work of information centres and stations,
- Creation of competitive digital content of information sources,
- Organisation and hosting of international and pan-Russian tourism forums, exhibitions and other activities,
- Implementation of the use of innovative technologies in the promotion of tourist products.

A network of national marketing centres has been established for the promotion of Russian tourism products abroad. Managed by the FSUE (Visit Russia), these follow new principles of partnership between state and businesses.

Various steps have been taken to further relax the visa regime for visiting Russia. These include the identification of six short tours of up to three days, which are offered as visa-free for foreign tourists.

Innovative and inclusive marketing approaches in Russia

An initiative to strengthen the awareness and image of Russia internationally, and to involve Russian citizens, has been a competition to design a new logo to support the Russian tourist brand. Ten finalists were identified, followed by a vote on the “Russia Travel” portal.

Tourism monitoring processes have included an analysis of consumer messages on social media. A geographically distributed automated system (GDAS) has been used to collect data from sources such as Twitter, *Vkontakte*, Facebook, *Odnoklassniki*, Google+, LiveJournal, YouTube and Instagram, as well as from blogs, forums, reference sites, online-media and thematic sites. Monitoring is used to establish ratings of tourist destinations and operators. This data is used to check and supplement information on the national portal “Russia Travel”, and for the identification of popular destinations and the compilation of tourist routes.

Statistical profile

Table 1. Russian Federation: Domestic, inbound and outbound tourism

	2012	2013	2014	2015	2016
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips
Overnight visitors (tourists)	31 798	32 561	33 799	43 657 |	48 215
Same-day visitors (excursionists)
Nights in all types of accommodation
Hotels and similar establishments
Specialised establishments
Other collective establishments
Private accommodation
Inbound tourism					
Total international arrivals
Overnight visitors (tourists)	25 438	26 852	24 571
Same-day visitors (excursionists)
Top markets
..
..
..
..
Nights in all types of accommodation
Hotels and similar establishments
Specialised establishments
Other collective establishments
Private accommodation
Outbound tourism					
Total international departures
Overnight visitors (tourists)	42 921	34 390	31 659
Same-day visitors (excursionists)
Top destinations
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TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	17 876	20 199	19 451	13 204	12 823
International travel receipts	10 759	11 988	11 759	8 420	7 788
International passenger transport receipts	7 117	8 210	7 692	4 784	5 035
Outbound tourism					
Total international expenditure	48 096	59 503	55 382	38 434	27 653
International travel expenditure	42 798	53 453	50 428	34 932	23 951
International passenger transport expenditure	5 298	6 051	4 954	3 502	3 702

.. Not available; | Break in series

Source: OECD Tourism Statistics (Database).


StatLink  <http://dx.doi.org/10.1787/888933642267>

Table 2. **Russian Federation: Enterprises and employment in tourism**


	Number of establishments ¹	Number of persons employed ²				
	2016	2012	2013	2014	2015	2016
Total	..	..	..	..	..	..
Tourism industries	114 566	430 414	421 593	442 760	422 027	508 228
Accommodation services for visitors	20 023	386 359	375 322	399 146	402 577	466 643 |
Hotels and similar establishments	14 948	140 997	140 898	151 076	153 975	220 127 |
Food and beverage serving industry	80 532	..	..	..	..	..
Passenger transport	1 616	..	..	..	..	..
Air passenger transport	91	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	1 316	..	..	..	..	..
Water passenger transport	209	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	12 395	42 370	43 973	41 337	17 316	39 969
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; | Break in series

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888933642286>



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