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RESEARCH ARTICLE



Tourism industry in a 'new reality' and regional development opportunities: the case of Russia

Andrei Yakovlev ^a, Olga Balaeva ^a, Marina Predvoditeleva ^b
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ABSTRACT

The COVID-19-related crisis had a strong negative effect on the world tourism industry, as has the current military conflict in Ukraine. However, with crises come opportunities as this research shows in the case of the Russian tourism industry. The 2020 crisis created the preconditions and opportunities to change the tourism industry's historically distorted outward-oriented structure and promote regional development through domestic tourism. Active communications between the government and business during the pandemic helped reduce uncertainty for firms and design and implement appropriate governmental sectoral policies. The demand for such policies increased after large-scale international sanctions imposed on Russia in 2022. However, the allocation of large federal budget financial resources to support the industry also creates risks of opportunistic behaviour. The tourism industry's development in Russia will depend on the government's ability to resist pressure from rent-seeking interest groups.

ARTICLE HISTORY

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KEYWORDS

tourism industry, COVID-19 pandemic, regional development, domestic tourism, Russia

摘要

“新现实”中的旅游业与地区发展机遇:以俄罗斯为例。 *Area Development and Policy*. 与新冠肺炎相关的危机对世界旅游业产生了强烈的负面影响,乌克兰当前的军事冲突也是如此。然而,正如这项研究在俄罗斯旅游业所显示的那样,危机伴随着机遇。2020年的危机为改变旅游业历史上扭曲的外向型结构,通过国内旅游促进区域发展创造了前提和机遇。在新冠肺炎大流行期间,政府和企业之间的积极沟通有助于减少企业的不确定性,并计划和实施适当的政府部门政策。在2022年对俄罗斯实施大规模国际制裁后,对此类政策的需求有所增加。然而,为支持该行业而分配大量联邦预算财政资源也带来了投机行为的风险。俄罗斯旅游业的发展将取决于政府抵抗寻租利益集团压力的能力。

关键词

旅游业, 新冠肺炎大流行, 地区发展, 国内旅游, 俄罗斯

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RESUMEN

La industria del turismo en una 'nueva realidad' y las oportunidades de desarrollo regional: el caso de Rusia. *Area Development and Policy*. La crisis relacionada con la COVID-19 tuvo un efecto muy negativo en la industria del turismo en todo el mundo, y lo mismo está ocurriendo con el actual conflicto militar en Ucrania. Sin embargo, con las crisis también surgen oportunidades, tal como se muestra en este estudio en el caso de la industria del turismo ruso. La crisis de 2020 creó las precondiciones y oportunidades para cambiar la estructura de la industria turística, que históricamente ha estado distorsionada y orientada hacia fuera, y para fomentar el desarrollo regional a través del turismo nacional. La comunicación activa entre el Gobierno y el comercio durante la pandemia disminuyó la incertidumbre de las empresas, y permitió diseñar y aplicar políticas sectoriales gubernamentales adecuadas. Tras las sanciones internacionales a gran escala impuestas a Rusia en 2022 aumentó la demanda de tales políticas. Sin embargo, la asignación de grandes recursos financieros del presupuesto federal con el objetivo de apoyar a la industria también genera riesgos de conductas oportunistas. El desarrollo de la industria turística en Rusia dependerá de la capacidad gubernamental para resistir la presión de los grupos de interés que buscan la captación de rentas.

PALABRAS CLAVE

industria turística, pandemia de la COVID-19, desarrollo regional, turismo nacional, Rusia

АННОТАЦИЯ

Сектор туризма в «новой реальности» и возможности регионального развития: кейс России. *Area Development and Policy*. Кризис, вызванный пандемией COVID-19, оказал сильное негативное влияние на мировую индустрию туризма, как и текущий военный конфликт на Украине. Однако кризисы приносят новые возможности, как показало данное исследование на примере российского сектора туризма. Кризис 2020г. создал условия и возможности для изменения исторически искаженной, ориентированной на выездной туризм, структуры туристического сектора, а также для регионального развития через внутренний туризм. Активное взаимодействие государства и бизнеса во время пандемии помогло снизить неопределенность для фирм и разработать и реализовать необходимые меры отраслевой политики. Запрос на подобные меры увеличился после введения против России масштабных международных санкций в 2022г. Однако выделение крупных федеральных финансовых ресурсов для поддержки отрасли также создает риски оппортунистического поведения. Развитие туристического сектора в России будет зависеть от способности государства противостоять давлению групп интересов, стремящихся к получению ренты.

КЛЮЧЕВЫЕ СЛОВА

сектор туризма, пандемия COVID-19, региональное развитие, внутренний туризм, Россия

1. INTRODUCTION

The COVID-19 pandemic and the ensuing economic crisis have affected different industries to varying degrees. The business environment has changed so drastically that many researchers and practitioners refer to the current situation as a 'new reality' (e.g., Jacobides & Reeves, 2020; Kissinger, 2020). Tourism was among the industries that suffered especially badly (e.g., Khalid et al., 2021; Pardo & Ladeiras, 2020). The closing of national borders in 2020 stemmed international tourist flows, subsequently causing a shift in entrepreneurial focus in this industry towards domestic tourism, which creates new opportunities for regional

development and for reducing inter-regional and social inequality (e.g., Li et al., 2016; Goh et al., 2015; Haddad et al., 2013).

The case of Russia is important in this context. Russia is a large non-homogeneous country characterized by widely disproportionate tourism industry development. On the one hand, over the last 20 years, Russia has been among the world's leaders based on the number of tourists travelling abroad; in 2019, 45 million outbound trips were made by Russian citizens, and Russia was ranked 8th globally in this respect (World Bank, 2019). On the other hand, the country has a high tourism potential, which is yet to be unlocked. In 2019, Russia was ranked 39th among 140 countries in the Travel & Tourism Competitiveness Index (TTCI). Interestingly, it was 20th in terms of the 'Natural and Cultural Resources' sub-index but 105th in terms of the 'Travel & Tourism Policy and Enabling Conditions' sub-index.

A distinctive feature of Russian tourism lies in the distorted structure of the industry, i.e., the historical prevalence of outbound over inbound and domestic tourism. Accordingly, the main benefit from the money spent by Russian tourists is gained by countries other than Russia. This structure is a consequence of the spontaneous adherence of the tourism business to customer demand in a situation of considerable growth in Russian citizens' personal incomes in the 2000s and insufficient development of the local infrastructure enabling domestic travelling. The lack of a comprehensive government policy for tourism industry development was also an important factor.

The pandemic-related crisis had an extremely strong negative effect on tourism in Russia. However, every crisis creates new opportunities. This leads to the research question of this study: how did the COVID 19 pandemic and the ensuing economic crisis affect the Russian tourism industry and what regional development opportunities did it generate due to a new focus on domestic tourism?

To answer these questions, in-depth interviews were conducted with representatives of the Russian travel business and public officials in Russian regions. These interviews allowed us to understand the business response to the pandemic and assess the business view regarding the efficiency of the government's anti-crisis measures. Besides that, travel and tourism statistics, industry reports, and governmental documents were examined, as well as best regional level tourism development practices.

Analysis is based on the period of the COVID-19 related crisis as the research and writing was completed by January 2022. However, taking into account current military conflict in Ukraine and large-scale international sanctions against Russia including restrictions on international travel, the problem of the contribution of domestic tourist flows to the survival of Russian tourism has become even more relevant. The lessons of survival and the experience of tourism development in a complex geopolitical situation in Russia covered in this article may be useful for other developing countries.

The next section of the paper presents an overview of previous research on tourism industry development in emerging economies. The subsequent section describes the structure and main trends in development of tourism in Russia before 2020, which is followed by a section describing the data and research methodology, and a section detailing the impact of the pandemic on the Russian tourism industry, firm-level responses to the crisis, and government policy to support the industry. The final section concludes and outlines opportunities for tourism development under new conditions.

2. REVIEW OF PREVIOUS STUDIES

Tourism, regarded as one of the drivers of economic development, contributes to the economy not only directly (through travel companies' activities) but also indirectly through job creation in many allied sectors, investments inflows, local production and crafts, transport, and real

estate sector development (Crouch & Ritchie, 1999; Scheyvens, 2016). From this perspective, tourism development is illustrative of problems in implementing industrial policy, especially coordination problems (Rodrik, 2004, 2007).

Tourism is a multicomponent sector with a large number of stakeholders in different segments and niches. For systemic development of tourism, coordination of these stakeholder's actions is required. Coordination according to Rodrik (2004, 2007) involves inclusion of all key stakeholders of the industry in the process of development and joint implementation of sector development projects. From the side of the business, stakeholders include big firms and business associations from tourism and related industries; from the side of the state they comprise federal, regional and municipal authorities. The formation of mechanisms of coordination and interaction between government agencies and business contributes to the reduction of uncertainty and the provision of adequate information about business opportunities to all market players. It helps to attract investment and increase the number of market players and creates favourable conditions for the development of tourism and regional development.

Acceptance by the state of its role as a coordinator of interactions between key stakeholders helps reduce risks and uncertainty for all market players (Rodrik, 2007). Simultaneously, engagement with the private sector provides the government with adequate information needed for the elaboration and implementation of a more efficient policy to develop industrial markets. The idea of coordinating stakeholder activities underpins the approaches proposed for overcoming the negative effects of the 'middle income trap' (Doner & Schneider, 2016).

The need for a comprehensive approach and engaging many players for domestic tourism development in large developing countries has been emphasized in papers in the Brazilian and Chinese contexts. Bartholo et al. (2008) noted the low efficiency of the tourism development policy implemented by the Brazilian government, citing two success stories of community-based tourism destination development (Prainha do Canto Verde and Silves). China's positive experience of domestic tourism development is based on the capabilities and holistic ability of the relevant regional authorities (Wang & Ap, 2013) and coordination between companies in the industry (Tang, 2017).

Huh and Lee (2020) state that the synergistic effects among interconnected companies, end users and central/local authorities could contribute the balanced regional cultural and creative industry growth. Liu et al. (2020) have highlighted the importance of interaction between the central government and local authorities, emphasizing the latter's coordinating role in rural tourism development.

Tourism development helps reduce inter-regional inequality by improving living standards primarily in more developed countries (e.g., Portugal, Greece, Israel) where the tourism industry represents a significant share of the economy (Krakover, 2004; Proença & Soukiazis, 2008). However, stimulating tourism in countries both with high tourism potential and disproportionate regional tourism may aggravate inequality in regional development through the concentration of investments and government support in more successful regions, thus intensifying these regions' dependence on tourism and creating the 'Dutch disease' effect (Chao et al., 2006).

Nevertheless, a survey based on data for European Union (EU) countries' regions has demonstrated that, on average, the positive effect from domestic tourism on regional economies (except regions with a high concentration of international tourist arrivals) exceeds the effect from international tourism (Harb & Bassil, 2020). The reduction of regional disparities owing to domestic tourism in Brazil and Turkey has been achieved by creating new tourist destinations and travel itineraries, as well as redistributing resources and investments (Haddad et al., 2013; Seckelmann, 2002). Li et al. (2016) asserted that locals tend to visit remote (and

less developed) territories more often than foreign tourists. Wang et al. (2020) claimed that tourism impacts less developed regions more profoundly than developed ones.

Therefore, tourism development, especially domestic tourism, may contribute to aligning regions' level of economic development in large developing countries. However, this needs efficient government tourism policy implementation regarding the interaction mechanisms between the authorities and business.

3. MAIN CHARACTERISTICS OF THE RUSSIAN TOURISM INDUSTRY BEFORE THE PANDEMIC

In 2019, the tourism industry accounted for 10.4% (USD 9.2 trillion) of global GDP and one-tenth (334 million) of jobs (World Travel and Tourism Council (WTTC), 2021a). Russia's tourism industry, however, was much smaller: the overall contribution of tourism to national GDP in 2019 totalled 4.9% (USD 75.5 billion), and people employed in the industry accounted for 5.6% of total employment (WTTC, 2021b). These figures reflect the cumulative effect of the sector's influence on the economy taking into account the profits generated in the hotel, restaurants and catering sector, the transport sector, and other related industries. Tourism's direct contribution to GDP, i.e., the total amount of direct spending on tourism and travel inside the country, was only 1.2% in 2019.

Russia is a large differentiated country whose regions differ strongly in terms of their socio-economic development (Bradshaw & Vartapetov, 2003). Despite its rich natural and cultural resources, Russia's tourism potential has only been unlocked to a very small degree because of inferior conditions for conducting business and poor infrastructure. However, in 2019, Russia was ranked 39th among 140 countries in the TTCI. This quite high ranking was mostly due to the high position (20th) in the 'Natural and Cultural Resources' sub-index. Russia's results in other sub-indices are far less impressive (Table 1).

A distinctive feature of Russian tourism is the distorted structure of the industry, namely the historical prevalence of outbound over inbound and domestic tourism. This structure is a consequence of the tourism business's spontaneous adherence to customer demand in

Table 1. Sub-index and associated pillar rankings for Russia in the travel and tourism competitiveness index (TTCI).

Enabling environment	46	Travel and tourism policy and enabling conditions	105	Infrastructure	47	Natural and cultural resources	20
Business environment	92	Prioritization of travel and tourism	86	Air transport infrastructure	23	Natural resources.	34
Safety and security	98	International openness	123	Ground and port infrastructure	68	Cultural resources and business travel	18
Health and hygiene	6	Price competitiveness	27	Tourist service infrastructure	69		
Human resources and labour market	35	Environmental sustainability	82				
ICT readiness	48						

Source: World Economic Forum (WEF) (2019).

a situation of a huge demand for outbound destinations after the opening of the borders in 1991 and considerable growth in the personal incomes of Russian citizens in the 2000s. As early as 2002–2003, Russia was among the top ten countries in terms of spending on outbound tourism.

According to the Federal Statistics Service (Rosstat), the number of tourists departing via travel agencies for tours in foreign countries in 2010 was nearly four times greater than the number of tourists departing for tours inside Russia.¹ A considerable weakening of the exchange rate of the Russian rouble with the US dollar and the euro in 2014–2015 reduced this gap but the margin remained significant. In 2019, 7.5 million people went on foreign tours, with only 4.4 million travelling inside Russia. Consequently, the main benefits from the money spent by Russian tourists accrued to countries other than Russia.

The main players in the Russian tourism industry are tour operators and travel agencies. Tour operators create tourism products, which are promoted and marketed both by tour operators (through retail offices or online) and travel agencies. At the start of 2020, Russia had approximately 4600 tour operators and 20,000 travel agencies. Tour operators' and travel agencies' interests are represented by professional associations, with the most influential being the Association of Tour Operators Russia (ATOR)² and the Russian Union of Travel Industry (RST).³ However, far from all industry players consider them real forces capable of influencing tourism policy and show an active interest in interacting with them (especially in the case of small businesses, which dominate the industry).

The weakness of the regulator, the Russian Federal Agency for Tourism (Rosturizm), established in late 2004, has for long been a serious institutional problem for the Russian tourism industry. For many years, Rosturizm performed the purely bureaucratic functions of issuing licences and monitoring travel companies' activities, without taking real measures to develop Russian tourism. Most regions have also lacked a policy for managing and developing the tourism industry in cooperation with business.

The situation started changing in 2019 with the arrival of a new, energetic team led by Zarina Doguzova. It can be assumed that her working experience in the government office's press centre and then in the Presidential Directorate for Public Relations and Communications, her personal contacts as well as personal traits, e.g., passion for work and enthusiasm, subsequently allowed her to attract resources to develop the industry, even during the pandemic.

Thus, by 2020, the tourism industry was playing a limited role in the Russian economy. Its distorted structure (with a predominance of outbound tourism) resulted in a situation where the main beneficiaries of Russian tourist spending were in other countries. Further, there was virtually no government policy for tourism development.

4. DATA AND METHODOLOGY

Analysis of a particular industry's reaction to an acute economic crisis should be based on different sources of information. The need to use data from state and international agencies, industry analysts' reports, and business media publications is clear. However, this type of data, characterizing the dynamics of the situation in the industry and its individual segments, does not allow full understanding of the motives underlying economic entities' actions or industry development prospects in the new conditions. Therefore several sources of data and information permitting a comprehensive view of the problem were employed.

First, in our survey, active use was made of travel and tourism statistics (UN World Tourism Organization (UNWTO), WTTC, Euromonitor, Rosstat), industry reports prepared by Russian travel associations. Second, public comments and interviews given by the officials and representatives of tourism industry were used as sources of information. In particular, the

authors drew on a detailed interview with the head of Rosturizm published in December 2021 (RBC, 2021). Third, semi-structured interviews with anonymous representatives of the Russian tourism industry and regional officials conducted in October–December 2020 afforded an important source of information.

The heads of two leading business associations were the first respondents, and their interviews provided a general picture of the industry during the pandemic. The other respondents were selected to ensure representation from companies of different sizes operating in different segments of the industry and in different regions (Table 2). Interviews were also held with regional officials with tourist-related responsibilities. In total, 13 interviews were carried out. Once interviewees' opinions repeated those of earlier respondents it was agreed that further interviews would bring no new insights into the phenomenon (Glaser & Strauss, 1967).

The interview scenarios for three categories of respondents (representatives of companies, business associations and regional officials) followed the same general structure with some adaptation due to different perspectives. First, all respondents were asked about the effect of the crisis on the tourism business and the response of companies in the industry to the challenges, including changes in the interaction of firms with consumers and suppliers. Second, association and company representatives were asked to assess government anti-crisis support measures as well as general government policy support for tourism. Interviews with regional officials included more detailed questions about pre-crisis support programmes, measures and mechanisms and vertical (federal-regional) and horizontal (interregional) cooperation for tourism development. Finally, questions were asked about the challenges and development prospects of the industry and expectations of market players.

Interviews were confined to tourism companies; transport companies and firms from the hotel, restaurants and catering sector and other related industries were not included, because their activities are significantly generated by the tourism flows. Besides that, they serve not only tourists but also local people. Therefore, it was decided to concentrate the limited

Table 2. Interview details.

Description	Region	Size	Respondent
The Russian Union of Travel Industry (RST)	Moscow	3000+ members	Head
Association of Tour Operators Russia (ATOR)	Moscow	31 members	Head
Full-cycle travel agency	Moscow	Small	Director
International tour operator	Moscow	Large	Senior manager
Online booking platform	Moscow	Medium	Director
Domestic tourism tour operator	Moscow	Large	Owner/director
Tour operator	Moscow	Medium	Senior manager
Tour operator	Moscow	Large	Senior manager
Travel agency	Perm Region	Small	Owner/director
Excursion agency	Novgorod Region	Small	Owner/director
Domestic tourism tour operator	Sevastopol	Small	Owner/director
Regional authority supervising tourism	Perm Region	-	Senior official
Regional authority supervising tourism	Novgorod Region	-	Senior official

research resources on the core sector of the tourism business. Statistics on related industries were also used in analysing the general effects of the crisis and assessing the tourism industry's development prospects. In order finally to identify policy implications, case studies were conducted to explore the best tourism development and coordination management practices in a context of pandemic effects in several case study regions with particular attention to Novgorod.

5. RESULTS

5.1. Impact of the COVID-19 pandemic on the Russian tourism industry

In 2020, the COVID-19 pandemic practically paralysed global tourism industry activity for several months. According to UN World Tourism Organization (UNWTO) (2020), the number of international arrivals in 2020 dropped by 74%, and export revenues from tourism decreased by USD 1.3 trillion (more than 11 times the loss recorded during the 2008 western financial and global economic crisis). The World Travel and Tourism Council (WTTC, 2021a) estimated that the tourism sector's contribution to global GDP shrank by USD 4.5 trillion in 2020 (49% year-on-year), international tourists' expenditures decreased by 69%, and spending on domestic travel decreased by 45%.

In 2020 the Russian tourism industry experienced a similar steep decline, but with variations across segments. According to ATOR, in 2020, inbound tourist flows fell by 93.6%, and outbound flows fell by 77.5% over 2019. However, domestic tourist flows dropped by only 35–40%.⁴

In 2021, the overall situation improved, but mostly regarding domestic tourism. The head of Rosturizm estimated that the total tourist flow within Russia (including everyone staying in a hotel for at least one night) would be 56 million people by the end of 2021 (RBC, 2021). Domestic tourism volumes would thus be restored to nearly 90% of the 2019 level. In some regions (Black Sea resorts, Altai, Kamchatka, Kaliningrad Region, Karelia, etc.), the figures were expected to be much higher. However, regions traditionally highly dependent on foreign tourism and business travelling (Moscow, St. Petersburg, Vladivostok) would likely continue to experience a decline both in terms of the number of tourists and revenue.

The head of Rosturizm estimated that the total number of people employed in the tourism industry (including the hotel sector and other related industries) would reach 2.3 million people by the end of 2021 (92% of the 2019 level). However, in 2020, employment in the sector dropped to 1.7 million people. The total industry volume in 2021 was evaluated at RUB 2.5 trillion (USD 35 billion), or 70% of the 2019 level. The losses of RUB 1.2 trillion (USD 17 billion) were caused by the lack of foreign tourists.

Outbound tourist flows slightly increased in 2021, according to ATOR estimates, but were still 40% below the 2019 level. Notably, the premium segment was demonstrating a stable growth in 2021, accounting for 23% of total demand.

5.2. Tourism companies' reaction

The Russian tourism industry has experienced a series of severe shocks during the past several years: a deep overall recession in the industry during the global financial crisis of 2008–2009; a drastic decline in demand in 2014–2015 due to a two-fold devaluation of the rouble (against the background of the armed conflict in Eastern Ukraine and international sanctions imposed on Russia); and in 2015–2016 a complete halt of tourist flows to Egypt and Turkey (a traditional vacation destination of many Russians).⁵ In all these cases, the tourism industry did not receive any compensation, leading to the bankruptcies of major tour operators.⁶ One of the consequences of these crises was the removal of financially unstable firms from the tourism

industry, as well as an increase in the stress resilience of the remaining market players, including their preparedness for the sudden appearance of new 'black swans'.

Nevertheless, commenting on the events of 2020, the respondents mentioned that they had never before experienced a crisis of such magnitude: 'There has never been such a crisis ... I would call this situation not so much a crisis, but a new reality'. However, companies' general reaction to the crisis, as in other similar situations, involved cutting current expenses, settling customers' and suppliers' claims, and searching for new niches.

Tourism companies' main costs were connected with paying salaries and rent for premises. The interviews revealed that large and medium companies downsized by 20–30% in 2020, while small firms had much smaller personnel cuts. Notably, there was no mention of discontinuing renting premises, as initially the respondents were expecting the pandemic to end within a few months, after which they could return to the offline communications with clients.

An important aspect of firms' survival strategies during the crisis was agreeing with clients on postponement of fulfilment of obligations for booked tours. The tourism companies' business model is based on prepayment for clients' tours; however, the funds paid by the clients are not retained in the tour operators' accounts, but are used to book hotels and air tickets. Under these circumstances, clients claiming immediate refunds in March–April 2020 would bankrupt most companies in the industry.⁷ In this context, Rosturizm and professional associations actively lobbied the government to postpone the return of money for cancelled tours until the end of 2021. However, the government passed the relevant decree only at the end of July 2020; for the four prior months, tourism companies had to spend much time and effort settling the matter with their clients. Nevertheless, the agreement to postpone the fulfilment of obligations became an important factor in stabilizing the situation in the industry. According to Rosturizm, by the end of 2021, tour operators had repaid 80% of debts to tourists.

Regarding the search for new market niches, the main strategy for outbound and inbound tourism companies was reorientation to work in the domestic tourism segment. The reason for this was that many Russians who preferred to vacation abroad were forced to spend their vacations in Russia in 2020. As one respondent noted: 'My favourite quote over the Summer was: we were not allowed to go to Barcelona, so we came to you'.

Naturally, large firms with more resources were more able to switch to the domestic market. Small firms working with foreign tourists tried to develop new products. For example, the owner of a travel agency prepared promotional material regarding the sights of Moscow, focused on the demand from large and medium-sized companies that could use such publications for hospitality purposes.

The change in the structure of sales between tour operators and travel agencies was significant for the market. Historically, tour operators worked with hotels and airlines, leaving travel agencies to interact with final consumers. ATOR estimated that, before 2020, only 20% of tour sales were made directly by tour operators, while 80% went through travel agencies. With the COVID-19 pandemic, against the background of tougher competition for customers and the need to reduce costs, these figures were reversed: up to 80% of all sales were carried out by tour operators themselves, primarily through their websites.

Consequently, travel companies had to adapt to a new way of communicating with clients, focusing on advice on the choice of holiday destinations instead of directly booking tours. The problem here, however, is that before the pandemic most customers did not regard such consultations as a separate service; they were perceived as part of the tour sales package.

The strategy of forced 'going online' was easier to implement for companies that had already started developing their online resources before the pandemic (thereby giving an

advantage to firms that more actively invested in new technology). The transition to online sales and developing and promoting online products (online excursions, video blogging, etc.) triggered higher demand for IT specialists and an increase in their salaries (in contrast to the general decline in employment in the industry).

The smallest and largest tourism companies proved to be more resilient to the crisis. The interviews suggested that small firms survived due to family business organization and the frequent practice of combining the roles of ownership and management, as well as diversifying activities, which together provided the flexibility required in a crisis. Larger companies could afford more downsizing. Also, having their own IT departments helped them adapt faster to changing conditions and offer customers convenient online direct sales channels. The hardest hit were medium-sized companies, which lacked the flexibility and agility of small firms and did not have the resilience and sufficient resources to adapt their operations to the new situation.

5.3. The government's role in tourism support during the crisis

After the outbreak of the pandemic and the introduction of restrictions in spring 2020, the Russian government launched a business support programme, focusing on small and medium-sized companies as well as on those sectors most affected by the lockdown (including tourism). The support measures included three-month wage subsidies for small businesses equal to the legally established minimum salary. Another important measure involved interest-free loans for firms in the hardest hit industries, which could later be transformed into subsidies if the enterprise maintained employment at or above 90% of the pre-crisis level. Tax deferrals were also granted.

Although the implementation of these measures in Russia began in May 2020 (i.e., about two months after the lockdown introduction, while the similar time period in EU countries was shorter), many tourism companies managed to make use of them. The interviews naturally focused on tourism-specific measures rather than on support programmes that were the same across industries. These measures included, first and foremost, the government's decision to postpone the fulfilment by travel companies of their obligations to clients regarding cancelled tours. Although a resolution to this effect was adopted only in July, Rosturizm's efforts to lobby for this decision were highly appreciated by the respondents.

An even more important factor was the active communication of Rosturizm with industry representatives. They at first concerned organizing the return of Russian tourists from other countries during the spring 2020 lockdown. Almost simultaneously, Rosturizm established contacts with leading business associations and major tour operators to develop special measures to support the industry.

Although the scope of financial support was relatively small, emotionally and psychologically these support measures were an important positive signal for tourism businesses. Our respondents noted: 'It was the first time in my life when someone offered something for the industry'; 'We work very closely and effectively with the authorities ... It happened for the first time during my entire 32 years in tourism'; 'No money has ever been given to tourism ... And now, for the first time ever, this year we have received some money for tourism, a cashback programme, subsidies ... A system of subsidizing charter flights across the territory of Russia is being developed'.

Importantly, from its initiation, the new Rosturizm team started implementing measures to develop the industry. An important aspect of government support for the Russian tourism industry was the cashback programme (launched in August 2020) involving payments for travelling around Russia, which focused on end consumers and implied a refund to the consumer of up to 20% of the cost of the tour. The government returned about 1.2 billion roubles to people for trips around the country, but this amount represented only about 8% of

government funding for the programme. The head of Rosturizm explained this as due to low awareness of the programme and the effect of the pandemic (RBC, 2021). Other reasons were also mentioned in the interviews; in order to join the programme in August 2020, travel companies had to complete a considerable amount of work within a few days, requiring IT specialists' and accountants' skills. This was feasible for large tour operators, but created great difficulties for small and micro-businesses.⁸ Nevertheless, the programme was continued in 2021 and produced a more significant effect; tourists received 6.5 billion roubles in cashbacks, and the total value of the programme's direct and indirect effects, as estimated by Rosturizm, was 70 billion roubles (about USD 1 billion).

In future, this programme will be aimed at stimulating travelling in the low season to reduce seasonal fluctuations in demand. The head of Rosturizm noted that 'stretching the season gives a completely different economy to the business, tourism becomes more interesting to engage in: it is more profitable for business to hire staff on a permanent basis – and this means a different quality of service, an incentive to invest in hotel renovation, and in training programmes for employees' (RBC, 2021).

Rosturizm grants to develop domestic and inbound tourism constitute another tool for domestic tourism development at the regional level.⁹ Grants were allocated to develop new, and improve existing, tourist routes, create tourist infrastructure, etc. A necessary condition for accepting a grant application was the initiator co-financing the proposed project (at least 30% of the amount of the requested grant). A total of 4061 applications were submitted in 2020, of which 474 received support. This measure has not only stimulated regional and individual travel company initiatives, it also contributed to developing regional benchmarking in tourism. In the interviews with regional officials responsible for tourism development, respondents specifically emphasized how many Rosturizm grants were obtained by companies from their region compared to the Russian average.

One of the most significant government measures to develop tourism in Russia is the national 'Tourism and the Hospitality Industry' project developed by the new Rosturizm team and approved in summer 2021. The project involves the allocation of substantial funds to develop tourism infrastructure and may become the main tool of a comprehensive tourism industry policy. To implement this project it is planned to allocate 199 billion roubles (over USD 2.6 billion) from the federal budget in 2021–2024.

In the respondents' opinions, a timely and adequate response to the pandemic by the new Rosturizm team (initiated before the crisis) was a prerequisite for reducing COVID-19's negative impact on the tourism industry: 'Rosturizm acted as a defender, a regulator; huge work – and we saw it – was done specifically on regulation. Rosturizm has existed for a long time, it was led by different teams . . . but such a position – to stand on the side of the tourism business – has almost never been taken by Rosturizm'; 'I think they have already done more than they could have done . . . to keep the industry afloat'.

5.4. The case of Novgorod region: development of domestic tourism

The analysis showed that despite the widespread anti-crisis government support among all Russian regions it was more effective in regions that implemented a consistent tourism development policy before the crisis. Novgorod region was one of them.

Novgorod is one of oldest Russian cities (founded in the 10th century), located in the northern part of Russia between Moscow and St. Petersburg. There are 37 UNESCO World Heritage sites in the city and the region. Compared to other Russian regions, the Novgorod Region is small (0.6 million population) and relatively poor (ranked 53rd out of 85 for per capita gross regional product in 2019, with an income level 71% of the national average).

After the appointment of the new governor Andrey Nikitin in 2017, tourism was highlighted as one of the priority industries. The goal of the regional development institute 'Rus

Table 3. Tourism development statistics for the Novgorod region.

Indicator	2019	2020	2021 (first nine months)
Number of tourists (thousands)	620.1	640.4	820.5
Number of tourist trips (thousands)	1090.7	1273.1	1338.7
Industry turnover (RUB billions)	2.9	3.7	4.6

Source: Based on data from the Novgorod regional government.

Novgorodskaya', created in 2017 by the regional government, was to develop the region's tourism infrastructure. The organization was co-founded by all major municipalities, as well as two federal museums operating in the region. 'Rus Novgorodskaya' used regional government subsidies and sponsor funds to address the following tasks: (1) support tourism entrepreneurship; (2) attract investment to develop the tourism infrastructure; (3) promote the region's tourist potential at the (domestically and internationally); (4) create comfortable conditions for tourists in the region; and (5) create and support a unified information resource for tourists.

These efforts have been successful. In 2017, the number of tourists visiting the region and staying in a hotel for at least one night was about 400,000 (340,000 Russians and 55,000 foreigners). In 2018, this figure rose to 501,000, and in 2019 to 620,000.

In 2020, despite the pandemic and the crisis, the flow of tourists increased to 640,000, and during the first nine months of 2021 it exceeded 820,000 people. The industry turnover from January to September 2021 amounted to 4.6 billion roubles (60% more than during the whole of 2019) (Table 3).

Novgorod region is one of the success stories of the regional-level management of tourism development. Other successful examples include Tatarstan, Tyumen region, Voronezh region and several more cases.

6. DISCUSSION: OPPORTUNITIES FOR TOURISM DEVELOPMENT

The analysis of interviews and available industrial reviews shows that the Russian tourism industry is coping with the COVID-19-related crisis much better than predicted by many experts. This was possible due to the high level of Russian companies' preparedness for the appearance of 'black swans'. A significant role in this respect was played by the crises of 2008–2009, and especially 2014–2015, which resulted in the departure of many inefficient companies from the market and helped the survivors develop the ability to adapt to rapid unfavourable changes. Lessons were also learned from the previous, not always successful, experience of implementing anti-crisis measures. Against the backdrop of extremely negative economic scenarios considered at the start of the pandemic, the Kremlin managed to mobilize bureaucratic staff and achieve higher government performance efficiency. Accordingly, despite some delays in implementing support measures in spring 2020, assistance to business was massive and was granted according to transparent criteria. According to the surveys conducted by the Russian Union of Industrialists and Entrepreneurs over many years, the share of respondents naming corruption as an acute problem decreased for the first time in the crisis year of 2020.

These effects were common for different industries of the economy. However, there were also discrepancies in how they dealt with the crisis, largely due to the quality of communication between business and the state (Simachev et al., 2021). The involvement of business in the discussion of support measures helped design more adequate measures. This approach mitigated the severity of the crisis even in the most heavily affected industries, including tourism.

However not all of the Russian economy support measures were effective, according to the interview respondents, a result that corresponds to those of Turgel et al. (2022). The comparison with other industries examined in a joint project between the Higher School of Economics and the Russian Union of Industrialists and Entrepreneurs (Dolgopyatova et al., 2021) shows that alongside state anti-crisis measures, Rosturizm succeeded in launching additional industry development measures that focused on supporting domestic tourism and that were highly evaluated by the respondents.

These measures both addressed tourism businesses' and customers' demands and needs regarding creating enabling conditions for socio-economic development and reducing inequality between the Russian Federation's regions. The deep crisis of 2020 created 'a window of opportunity' for the development of domestic tourism and the economic development of the regions. However, according to the interviews, there are two serious obstacles for such prospects: (1) the low quality of local infrastructure, lack of skills and competences, and risks of 'bad experience'; and (2) the quality of governance and state-business interactions.

This research revealed a growing understanding among decision-makers that successful industrial development requires close coordination between business (represented by large companies and business associations in tourism and related industries) and the state (represented by federal, regional, and municipal authorities), as well as inter-regional cooperation.

This approach corresponds to the ideas that have been actively elaborated in leading international experts' papers on development economics over the past 15–20 years (Rodrik, 2007; Sabel & Jordan, 2015). The outcome for the Russian tourism industry will be an increase in the number of market players, investment inflow, and market growth, which will facilitate the development of domestic and, subsequently, inbound tourism.

The cashback programme and grants for regional tourism infrastructure (which can be considered as 'selective incentives' for business; according to Doner & Schneider, 2000) as well as the national 'Tourism and the Hospitality Industry' priority project approved by the government in April 2021 can become concrete instruments for implementing new approaches to tourism development in Russia. In this respect, the disproportion in the current level of the tourism infrastructure as well the tourism potential in broader sense across the Russian regions (Kropinova et al., 2020) should be regarded.

Russia's experience also substantiates several other findings based on data from other countries. The first concerns the role of the personality factor. Respondents emphasized that successful tourism development was usually observed in the regions where the governor's attention was drawn to the sector. Moreover, the initiative of local businesses is no less important. There is a need for strong motivated leaders acting as first-movers and 'public entrepreneurs' on both sides (state and business).

Second, 'success stories' at the regional level are important. Despite the virtual absence of a federal tourism development policy before 2019, some regions have demonstrated success in stimulating development in this industry, as witnessed during the pandemic. The Novgorod Region was one such success story. Regional benchmarking and disseminating best practices are important for domestic tourism because its development is highly dependent on the regulatory environment and investment climate provided by regional and local authorities.

However, the growing attention to the industry, and especially the allocation of significant resources for its development, generate risks associated with the desire of large business groups' to gain control over the distribution of these resources and channel them in ways that serve their own goals. An indirect indication of such risks is the fact that, after the approval of the national 'Tourism and the Hospitality Industry' priority project and settling on the amount of funding, Rosturizm was actually removed from the management of the project. Relevant powers were delegated to a government commission, with investments in tourism development being made through a specially created corporation, Tourism.RF.

7. CONCLUSIONS

Any crisis generates not only problems, but also opportunities. In this paper, we have attempted to show this in the context of the Russian tourism industry. Despite the limited number of interviews, a consistent picture of the development of Russian tourism was established by using a variety of sources of information.

High historical industry dependence on outbound tourism both led to significant losses during the COVID-19 pandemic and a demand shift towards the domestic market. Thus, the current crisis created opportunities to develop domestic tourism, boosted owing to the effective actions of the new Rosturizm team. The communication mechanisms between the state and business that emerged during the crisis largely helped overcome the coordination problem, which stands out as one of the central ones for the new industrial policy. These communication mechanisms can play an important role in reducing uncertainty and risks for firms in the industry.

Rosturizm's efforts, aimed at creating conditions for developing the industry and lobbying for its interests, have attracted the attention of the country's political leadership to tourism. For the first time in post-Soviet history, significant federal budget funds have been allocated for tourism development. However, big money always attracts rent-seeking business groups. The development of the tourism industry, including the positive externalities associated with creating new jobs and reducing inter-regional inequality, will largely depend on how well the government succeeds in resisting pressure from such 'interest groups'.

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NOTES

1. The provided data includes only the tours organized by tourism companies. Many tourists travel on their own and are not covered by official statistics (especially for domestic tourism). The problem is less acute regarding outbound and inbound tourism, as incoming and outgoing tourists are included in all statistics (although millions of arrivals and departures from CIS countries in fact represent labour migration rather than tourism). Regarding domestic tourism, only expert assessments by professional associations and data from individual regional administrations are available, and these show that the share of independently travelling tourists within the country accounts for approximately 80% of the total.
2. ATOR, created in 2007, unites large tour operator companies from different Russian regions. ATOR members account for more than 90% of the entire outbound flow from Russia, more than 70% of inbound flow, and over 80% of the domestic tourist flow. As of December 2021, 31 companies and 14 associated partners were ATOR members.
3. RST was founded in 1993. It is the largest Russian professional travel association, encompassing tour operators, travel agencies, hotels, health resorts, transport, insurance, consulting, IT companies, educational institutions, mass media, public, and other tourism-related organizations. RST represents the interests of over 3,000 tourist companies in Russia.

4. See <https://www.atorus.ru/news/press-centre/new/53770.html>.
5. In October 2015, over 200 passengers returning to St. Petersburg from Sharm el Sheikh died in a plane crash caused by a terrorist attack (<https://www.cbsnews.com/news/egypt-russia-plane-crash-sinai-peninsula/>). In November of the same year, a Turkish fighter plane downed a Russian SU-24 bomber near the Syrian border killing the pilot (<https://www.bbc.com/news/world-middle-east-34912581>). These events were followed by Russia's ban on charter flights from Russia to Turkey and Egypt, dealing a serious blow to outbound tourism.
6. In 2014–2015, in St. Petersburg alone, major tour operators such as Neva, Solveks-Turne, and Versa (accounting for over 40% of the tourism market in the city) went bankrupt.
7. According to Rosturizm, by summer 2020, tour operators' debt to tourists amounted to 44 billion roubles (over USD 600 million).
8. Small businesses were more sceptical regarding interactions with the government; their representatives thought they 'would not be heard' and they 'would not be able to influence anything anyway'.
9. See <https://tourism.gov.ru/news/16973>.

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