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Anti-Crisis Measures to Reduce the Consequences of the Impact of Sanctions on the Tourism Industry of Russia

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ABSTRACT

In the conditions of existing threats — the lack of full-fledged travel mobility, the growth of air fares due to the complication of flight logistics and the duration of air travel, currency risks — the opportunities for the development of outbound and inbound tourism are limited. It is necessary to reorient the tourism business to the development and support of domestic tourism with the fragmented development of the incoming flow from neutral and friendly countries. To promote the development of various types of domestic tourism in demand by Russian citizens. To develop and implement a number of management solutions for leveling the emerging threats to the tourism sector. The object of the article is management decisions in the field of tourism in the context of international sanctions. The purpose of the article is to analyze possible measures to stabilize it in the face of sanctions by the international community. The tasks are to study the state of the tourism industry and hospitality; identification of risks posed to the industry by the imposition of sanctions; determination of the main types of instruments that mitigate external threats and consideration of the possibility of applying the proposed anti-crisis measures. In the article used common methods of research, such as observation, systematization and synthesis of collected theoretical and practical material.

Keywords: tourism; international sanctions; inbound and outbound tourism; domestic tourism; instruments of influence; sustainable development

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INTRODUCTION

The global tourism and hospitality industry is going through difficult times today. Anticovid restrictions have affected this area in all countries. According to the World Tourism Organization (UNWTO), the number of international trips in 2021 compared to 2019 decreased by 72%, and the industry revenue was only 54% of 2019 level. While the tourism industry has not recovered from the effects of the pandemic, international sanctions are being applied to it, which endanger its sustainable development and, in particular,—its international dimension. Thus, it becomes obvious that it is expedient to find managerial solutions aimed at leveling these threats.

Analysis of data of Rosstat for each type of paid services in the field of tourism in Russia for the period of restriction of tourist flows shows a significant decline in indicators in 2019–2020 (table 1).

Turnover of the Russian tourism industry in 2021 amounted to 2.5 trillion rubles, or 70% of the level of 2019 [1]. Anti-covid measures significantly reduced the flow of inbound tourism to Russia: from January to September 2021, foreigners made 175.8 thous.visits, although in the same period of 2019, this number reached 4.3 million.

These and subsequent data confirm that the tourism industry of the Russian Federation for the last three years is experiencing difficult times [2, 3] — annual performance indicators of industry organizations, given in *table 1*, can be observed to be negative.

Based on the data of the *table 2*, in the period of 2017–2020 there was a reduction of workers employed in the field of tourism: Their average and average number decreased by 45 038 people respectively (or 3.8%) and for 33 827 people (or 3.0%). The industry has been

negatively affected by the restriction of tourist flows, which was reflected in the fact that until 2019, there was an increase in the main indicators of its activity, and in 2020, there was a sharp decline: turnover decreased by 1096.8 billion rub. (or 36.1%), investments in fixed assets decreased by 16.1 billion rub. (or 4.5%), total cost of fixed assets decreased by 1464.9 billion rub. (or 29.6%), and residual — for 1072.5billion rub. (or 34.4%), introduction of new fixed assets decreased by 138.7 billion rub. (or 32.6%). Depreciation of fixed assets increased from 35.5% to 41.1% in 2017–2020 (per 5.6 p.p.), average salary of workers in the tourism industry decreased by 1200 rub. (or 2.2%) (see figure).

This was the state of the Russian tourism industry after the pandemic. Much was done for its sustainable development and return to its previous level, to restore the flow of travelers. This is what the national project "Tourism and hospitality industry" was aimed at,2 which set a course for the development of domestic tourism and clearly defined support measures. Today's external sanctions have spurred and accelerated this strategic objective. Strict measures by the international community endanger the sustainable development of the Russian tourism sector and especially its international component. In this context, it is advisable to reorient to the development and support of domestic tourism.

Restriction of Rosaviation' flights over the territory of the Russian Federation to airlines from 36 countries of the world in response to the ban on air travel over the EU countries, Canada, etc. reduces opportunities in the field of outbound and inbound tourism. There is an increase in air fares due to the complexity of logistics of flights and their duration — the remaining foreign airline in our market and

¹ Website of the Association of Tour Operators of Russia (ATOR). URL: https://www.atorus.ru/News/Press-Centre/new/58410.html

National project "Tourism and hospitality industry". URL: https://tourism.gov.ru/contents/documenty/plan-deyatelnosti/ natsionalnyy-proekt-turizm-i-industriya-gostepriimstva

Table 1 The volume of paid services in the field of tourism in Russia for the period 2017–2020

| The volume of paid services to the population, million rubles | 2017 | 2018 | 2019 | 2020 |
|---|---------|---------|--------|---------|
| Tourist | 166 520 | 172 090 | 179826 | 91 884 |
| Hotel and similar accommodation facilities | 219916 | 255 708 | 247279 | 181 577 |
| Specialized collective accommodation facilities | 137031 | 155 296 | 163824 | 114755 |
| Of these: health resort organizations | 112 305 | 124783 | 127186 | 85 527 |

Source: developed by the author based on the materials of Rosstat. Paid services to the population in the field of tourism. URL: https://rosstat.gov.ru (accessed on 04.03.2022).

 ${\it Table~2}$ Performance indicators of tourism industry organizations excluding small businesses for the period 2017-2020

| Indicator | 2017 | 2018 | 2019 | 2020 |
|---|----------|----------|---------|---------|
| Average strength of employees, people | 1191464 | 1166350 | 1179697 | 1146426 |
| Average number of employees, people | 1117138 | 1091346 | 1104288 | 1083311 |
| Average monthly wages of employees, rub. | 46 160.3 | 51 580.0 | 54185.4 | 52984.9 |
| Turnover, billion rub. | 2416.5 | 2785.4 | 3041.1 | 1944.3 |
| Investments in fixed assets, billion rub. | 313.1 | 348.9 | 359.5 | 343.4 |
| Availability of fixed assets at full year-end cost, billion rub. | 4254.3 | 4807.5 | 4942.9 | 3478.0 |
| Availability of fixed assets at year-end at residual book value, billion rub. | 2744.2 | 3091.7 | 3121.8 | 2049.3 |
| Introduction of new fixed assets, billion rub. | 242.1 | 385.4 | 425.9 | 287.2 |
| Depreciation of fixed assets at the end of the year | 35.5 | 35.7 | 36.8 | 41.1 |

Source: developed by the author based on Rosstat. Separate performance of the activities of the tourism industry (by the amount of OKVED 2 codes included in the collecting group "Tourism". URL: https://rosstat.gov.ru (accessed on 04.03.2022).

(in particular, Emirates, Turkish Airlines) have already announced a 20% increase in ticket prices.

Risks are seen from international hotel chains: withdrawal of franchises, breaking of contractual relations with owners of enterprises. It has already become a fact that the Finnish holding S-Group stopped operations in the Russian Federation, manager of Sokos hotels and working in the Russian market since 2006.

Since 22 international hotel operators are now represented in our country, such sanctions become a real threat to the industry. By 2023, at least three more operators working in the top price segment planned to enter the market: Jumeirah Group, Mandarin Oriental Hotel Group и TASIGO. Five international hotel operators (Accor Hotels, Radisson Hotel Group, Marriott International, IHG, Hilton Worldwide) are form 80% of the Russian network hotel room (78%

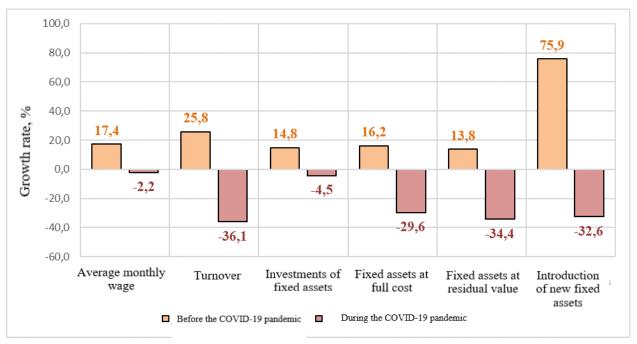


Fig. Dynamics of the main indicators of tourism industry organizations (without small businesses) before and during the pandemic

Source: developed by the author based on Rosstat. Separate performance of the activities of the tourism industry (by the amount of OKVED 2 codes included in the collecting group "Tourism"). URL: https://rosstat.gov.ru (accessed on 04.03.2022).

of hotels). 35 domestic networks are also on the market, but their concentration of Russian networks, unlike the international, is lower. At the same time, of the 25.3 thousand funds of accommodation in Russia, a quarter refers to the construction of the Soviet period (sanatoriums, boarding houses, recreation centers), including a large number of hotels and resorts in the Crimea, many of which have not been renovated for 10–20 years.³

The threat of revocation of licenses and withdrawal of software support for the tourist and hotel business is also real (Micros, Fidelio, Epitome) its international producers (Booking. Com doesn't work anymore on the territory of the Russian Federation).

Currency risks, currency movements, devaluation of the ruble, decrease in the purchasing power of the population also have

an impact on the development of tourism. Imposition of sanctions, deficit, increase in prices of imported products not subject to import substitution (coffee, chocolate, etc.),—all these factors will cause disruption of the production chains of cooking from many hotel restaurants in the short and long term. One cannot but mention the psychological aspect. Travel with the probability of unpredictable situations and possible threats increase the level of anxiety of Russian tourists, consequently, they delay travel indefinitely.

Thus, the expected impact of the sanctions on tourism could be as follows:

- loss of its humanitarian and social function with those countries that supported the sanctions;
- threat to the development of inbound and outbound tourism;
- lack of income from this industry in Russia due to exports of services;

³ Federal Agency for Tourism (Rosturism). URL: https://tourism.gov.ru (accessed on 04.03.2022).

- actual termination of those firms that specialize in international activities;
- breaking partnerships with foreign companies;
- restriction of event and business tourism markets;
- temporary large financial losses for tour operators of outbound tourism, air carriers, airports, travel agencies.

From the working version of the draft Government Plan⁴ it follows that the total cost of priority measures to support the Russian economy for the federal budget will exceed 1 trillion rub. Most of the additional spending will go to social support, including labour market stimulation, — 496 billion rub. In second place — transport (275 billion rub.). It is planned to direct 23.3 billion rub. to help small and medium business., industry -20 billion rub. To assess the damage caused by the Russian tourism and hospitality industry, it is not yet timely. But now you can talk about those losses, which are primarily related to the organization of outbound flights for tourists from abroad, the potential financial losses of airlines, accommodation, as well as tour operators (due to the refusal of foreigners to travel to our country). According to preliminary calculations, starting from February 25, 2022, the tourist business loses 40-45% of sales compared to January 2020. Number of reservations for various resorts for the summer of this year decreased by about 30%. Travelers choose Krasnodar Krai, Crimea, orient on available destinations. The most popular are Turkey, Egypt, Southeast Asia.

To assess the damage done to the tourist and hotel business in the medium term, it is advisable to carry out a full qualitative and quantitative monitoring. To do this, you need to collect information from tour operators:

- expected tourist flows before and after the sanctions in quantitative and monetary terms (general and in various directions);
- on the number of tourists planning to travel to Russia before the imposition of sanctions, and the estimated cash income of the industry organizations;
- suspected denials of visas and related losses;
- about companies that are closing and are planning to close soon (number of employees reduced).

Special attention should be paid to regions and data should be obtained from the field on tourist flows, means of accommodation and related infrastructure. This can serve as a basis for further management decisions regarding the development of domestic tourism in Russia and the reorientation of the entire industry to its support. At the same time, the entry flow from neutral or Russia-friendly countries (such as Turkey, Egypt, Tunisia) can be supported fragmentarily.

A number of states have not imposed sanctions against Russia: Brazil, India, China, South Africa, Turkey, Mexico, Argentina, Serbia, Bosnia and Herzegovina, Cuba, Venezuela, Nicaragua, Syria, Egypt, the UAE, as well as CIS countries — Belarus, Kazakhstan, Tajikistan, Armenia, Kyrgyzstan, Georgia, Azerbaijan, Moldova. Hungary is ambivalent, Africa and Latin America — are neutral. This is the target market with which in the future you can work on inbound and outbound tourism. Based on past experience, it accounts for just over a third of foreign citizens' visits to our country [4, 5]. Due to geopolitical situation and security requirements of international routes possible increase of flow from India, China. For these countries, it is advisable to simplify the visa regime, increase the stay on electronic visa, reduce the consular fee for its registration.

⁴ Izvestia (based on the working version of the draft government plan). URL: https://iz.ru/1303423/evgenii-kuznetcov-mariia-kolobova-mariia-perevoshchikova/pobolshomu-raschetu-stoimost-antikrizisnykh-mer-prevysit-1-trln-rublei

But priority should still be given to domestic tourism as a driver of leveling existing sanctions threats. And there's a real reason for that — in Russia there is a positive dynamic of recovery of travel in the country: 56 million people participated in them in 2021, which accounted for almost 90% of the "pre-covid" indicator 2019 [6].

With regard to sanctions, it should be noted that they have a long history (in the history of antiquity and the Middle Ages they had their name -"reprisals"). States often influenced their neighbors through indirect methods. The most common cause of sanctions, especially by the US, is the demonstration of force and the deliberate coercion of the targeted country to increase its economic costs. But, as history shows, sanctions, which create problems, often offer opportunities for extraordinary measures to overcome them, often having the effect of bringing people together around the Government and finding alternative solutions [7]. The author offers some anti-crisis measures to respond to threats and challenges to the tourism industry (*table 3*).

In modern conditions, the tourism industry should use the following opportunities:

Development of rail and road tourism and related infrastructure.

- Restrictions on the operation of some airports in the Russian Federation and the threat of lessor seizing aircraft from Russian airlines imply not only the development of a new transportation scheme for airlines, but also to take advantage of the existing transport infrastructure and to draw attention to the development of rail transport and rail tourism (possible use of the experience of Russian Railways).
- Increasing the role of car tourism will, in turn, require auditing of existing infrastructure. It is advisable to develop and implement as soon as possible an investment project for the construction of a national network of motels

that ensure the quality and safety of hotel services for budget travel (level of 2–3 stars), camping grounds, as well as roadside modern and safe places for rest, equipped with showers, toilets, etc. B Owing to declining incomes of potential tourists, further tariff increases are not feasible on toll roads GC "Autodor".

Development of agro-tourism and private enterprise, for which it is necessary:

- to develop a number of measures for the development of agrotourism, the use of villages, villages, guest houses in various regions of the Russian Federation as tourist facilities; to equip beach areas of rivers, lakes, reservoirs;
- agree with private investors to provide preferential loans and tax incentives;
- to implement the system of booking of such objects developed by Russian specialists;
- Ministry of Agriculture, Ministry of Construction, Federal Agency for Tourism prepare accordingly proposals for the construction of agricultural land housing, taking into account the protection of agricultural land from abandonment (which would require changes in legislation).

Introduction of new hotel formats, including non-capital construction.

Given the demand for rehabilitation tours and recreation in nature, it is necessary to audit the facilities of the sanatorium and resort, and to introduce modular structures (glamping) in the immediate vicinity of recreational zones, national reserves, to develop the appropriate infrastructure. A good example is the project of development of the natural park "Kudykina mountain" in the Lipetsk region, offering guests not only accommodation and food, but also participation in various leisure activities.

Creation of tourism products territories.

Regions such as Crimea, Krasnodar Krai, Altai, Kamchatka, Kaliningrad Region, Karelia, Sakhalin, Murmansk Region, Dagestan, Kabardino-Balkaria are fully restored the failures in the tourism industry, caused by

Table 3

Anti-crisis response measures to threats and challenges for the tourism sector

| Subjects of tourism and hospitality | Response immediate measures | Short-term measures | Measures in the medium term |
|---|---|--|--|
| Tourist companies and tourist infrastructure facilities | Regular online information meetings, meetings on the real situation in the tourism industry with Rosturizm, Rosaviation, the Ministry of Foreign Affairs of the Russian Federation and other departments. Organization of information tourist industry through specialized media on the situation in the industry. | Allocation of grants to tour operators to compensate for failed tours Well-organized work with insurance companies on payments to tour operators Cashback program extension in 2022 Easy participation in cashback program Development of cashback system for children | Reduction of the tax burden on tourist companies, transport companies, airlines (air ticket offices), who have suffered significantly from force majeure circumstances: cancellation of VAT payment within 3 years, reduction of profit tax rate to 3%, reduction of PIT rate to 5%. Granting of state-guaranteed preferential loans to tour operators (with a rate of no more than 5%) for the payment of funds to tourists for tours that failed in 2022 due to sanctions and payment of salaries to employees. Granting credit holidays. Facilitating the work of tour operators in the domestic and inbound tourism market in terms of insurance contribution or bank guarantee [8]. Creation of a strategy for the development of children's tourism in the Russian Federation, identification of policy measures for the development of children's tourism in the Russian Federation. Establishment of additional funding programmes for in-country recreation (for children, persons with disabilities, the elderly – retirees, for young people). Development of a programme for the development of railway tourism between the cities of the Russian Federation. Development of a program for the development of riiver tourism, construction of berthing walls in the cities of Astrakhan, Makhachkala, Derbent for the development of sea cruise tourism in the Caspian Sea. Development of a system of measures to develop cooperation in the field of tourism with countries that do not impose sanctions against Russia and are open to cooperation. These are China, India, other Asian and Arab countries, CIS countries. Solution of the issue of the accelerated procedure for obtaining visas in the Russian Federation, launching of e-visas for foreign tourists. Subsidizing charter flights from countries that have the potential to increase tourist flows: China, Arab countries, India. Assistance in the creation of Russian air ticket booking systems, railway tickets Maki |

Table 3 (continued)

| Subjects of tourism and hospitality | Response immediate measures | Short-term measures | Measures in the medium term |
|-------------------------------------|--|---|---|
| Hotel complexes | Audit of all available Russian online booking channels or alternative distribution systems: Ostrovok, AllHotel Market, Bronevik.com, Яндекс.Путешествия, Academservice (Best Eastern Hotels), One Two Trip, Tvil (analogue Airbnb, service of daily rent of apartments and apartments). Development of new online booking channels, as well as booking modules adapted for large and network hotels. Development of cloud-based hotel management systems Development of new start-ups for the development of secure hotel management software | Development of options for management of hotel enterprises, their entry into Russian networks, taking into account the experience of western and network technologies (copying and implementation) and the application of new standards. Reorientation of hotel owners to new software instead of recalled international hotel chains | Improvement of the quality of services by Russian hotel companies, restoration of the outdated number stock especially in the regions of the Russian Federation. Development of a system of support measures for the development of the hotel industry. Creation of a system of grants for the construction of rapid-construction complexes – accommodation facilities. Granting of preferential loans for construction, reconstruction of hotel infrastructure. Exemption from income tax, VAT of enterprises that reconstruct or erect accommodation facilities for tourists. Audit of the hotel fund in the Russian Federation, comparing the number of network and independent hotels of different classification, to draw up a regional map of the coverage of different regions by hotel facilities. Creation and priority development of Russian hotel groups and networks. Development of new formats of hotel enterprises: budget camping (modular structures), motels (for the development of autotourism), sanatorium resort facilities and development of national networks of spa facilities in the long term |

Source: developed by the author.

antithetical restrictions, proving that they have great potential in 2020. There is a need for further work on tourist territorial design in order to create tourism products of state entities, taking into account their unique features, crossregional coordination and synchronization. First of all, it should affect those 11 priority areas, which are defined by the national project "Tourism and hospitality industry".

Development of Russian software in the field of tourism and hotel business.

The threat of revocation of licenses and termination of software support by international manufacturers leads us to the need to develop among young entrepreneurs, students, start-ups, aimed at the production of Russian software in the field of hotel management, hotel income, sales. There should be a system of grants for the establishment of digital laboratories in specialized educational institutions, providing integration of specialists in the field of information technologies and hotel security for the project implementation of tasks in the short term.

Early completion of the modernization of the legal framework for tourism development [9, 10], adoption of the updated law on tourism activities, a new legislative act on tourist areas.

Use of financial measures to support the tourist and hotel business by the state:

• subsidizing the cost of summer tickets to distribute the tourist flow not only to the Crimea and Krasnodar Krai, but also to other regions;

- lengthening loan repayment periods;
- elimination of PIT on subsidies;
- deferral of insurance premiums;
- subsidies for part of the rent payments (especially for the restaurant business);
- the allocation of funds for the resumption of the program "Tourist cashback".

Creating a positive image of domestic travel for the short and long term for those countries that support the Russian Federation and do not impose sanctions.

Development of vocational schools on the basis of specialized educational establishments, providing specialized training and education of specialists of the hotel and tourism sector, aimed at improving the quality of services provided to the population.

Formation of Russian hotel chains.

The Russian Association of Independent Hotels is similar to the European structures "The Leading Hotels of the World" etc. need:

- to implement their own networks, which, by allowing owners to maintain operational independence, will force the introduction of quality standards and marketing support;
- make audit the hotel fund in the Russian Federation, comparing the number of network and independent hotels of different classification, draw up a regional map of the coverage of the various regions by hotel facilities in the short term, with the involvement of specialists from specialized educational institutions, Rostourism, leading hotel analysts and consultants, not affiliated with international companies.

Separately need to focus on working with regions.

In this direction is advisable:

- creating tourist passports and placing in the online space to inform the population about tourist resources;
- budgetary support for the construction and development of infrastructure in the regions;

- issuing tourist calendars in regions and informing the population;
- creation of tourist brands of regions and the positioning of the region through the developed brands;
- organization of volunteer tourist movement;
- development of information quality resources on the tourist potential of the region;
- training of representatives of the regions responsible for tourism, the main aspects of tourism activities, development of business plans and attraction of investors, marketing promotion, etc.;
- development of interregional cooperation, establishment of interregional tourism programmes.

Communication with the population plays an important role among anti-crisis measures:

- organization of competent information about the tourist potential of Russia, unique tourist sites, regions;
- TV series on tourist opportunities in the country, including multilingual;
- introduction of the subject "Local Studies" in schools;
- revival action of "My Motherland Russian Federation" in educational institutions;
- development of the cycle of general developing lectures on tourism within the society "Knowledge";
 - involving the public in the events.

Another direction of the anti-crisis measures is the training of qualified personnel, which means that it is necessary to:

- support of educational organizations implementing secondary and higher education programs for tourism;
- allocation of additional budget places for the areas of preparation "Tourism", "Hotel business";
- involvement of educational organizations in the implementation of training and retraining

programs at the expense of the federal budget and regional budgets;

• revival of the system of developing training in the field of tourism.

CONCLUSION

In the current conditions, it is necessary to mobilize all components of the tourism

industry: transport infrastructure, hotels and tourist complexes, specialists in this field (including representatives of travel companies and tour operators), experts on territories — to prepare new tourism products and provide them to Russian citizens. The article analyses current threats and risks of the sphere of tourism and develops some anti-crisis measures of response.

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