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ИССЛЕДОВАНИЕ ВЛИЯНИЯ ВНЕШНИХ ЭКОНОМИЧЕСКИХ ФАКТОРОВ НА СТРУКТУРУ РЕГИОНАЛЬНОЙ ТУРИНДУСТРИИ НА ПРИМЕРЕ СЕВЕРНОГО КАВКАЗА

STUDY OF THE INFLUENCE OF EXTERNAL ECONOMIC FACTORS ON THE STRUCTURE OF THE REGIONAL TOURISM INDUSTRY ON THE EXAMPLE OF THE NORTH CAUCASUS

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Аннотация

Статья посвящена исследованию устойчивости локального рынка индустрии гостеприимства в условиях разной степени ковидных ограничений и уровня вакцинации в регионах мира, эскалации военных конфликтов, роста цен на энергоносители и сырьевые товары, проблем с логистическими цепочками. Внешние отрицательные факторы изменили структуру спроса на услуги в целом и туристских услуги в частности. Этот тренд базируется на бюджетном, индивидуальном сегменте внутреннего туризма с учетом санитарно-эпидемиологической ограничений. Растет спрос на дешевые туры, «микротуры» и дестинации (не далеко от дома). Важным фактором снижающим спрос на туруслуги становится транспортная доступность. Курортные регионы Северного Кавказа (Кавказские Минеральные Воды) в этом направлении находятся в выигрышном положении, так как имеют развитую рекреационную инфраструктуру и квалифицированный персонал.

Ключевые слова: туризм, индустрия гостеприимства, внутренний туризм, рекреационный потенциал,

Abstract

The article is devoted to the study of the stability of the local market of the hospitality industry in conditions of varying degrees of covid restrictions and the level of vaccination in the regions of the world, escalation of military conflicts, rising prices for energy and raw materials, problems with logistics chains. External negative factors have changed the structure of demand for services in general and tourist services in particular. This trend is based on the budget, individual segment of domestic tourism, taking into account sanitary and epidemiological restrictions. There is a growing demand for cheap tours, "micro tours" and destinations (not far from home). Transport accessibility becomes an important factor reducing the demand for travel services. The resort regions of the North Caucasus (Caucasian Mineral Waters) are in an advantageous position in this direction, as they have a developed recreational infrastructure and qualified personnel

Key words: tourism, hospitality industry, domestic tourism, recreational potential

Introduction. The tourism and hospitality industry is one of the industries most affected by the global covid-19 pandemic. World GDP in 2020 declined by about 3.1%, its growth in 2021 to 5.9% did not significantly compensate for the economic losses. It is assumed that the growth rate of the world economy in 2022 will be weak to 4.4%. [14].

In 2019, tourism accounted for 10% of world GDP ($8.9 trillion). In 2020, the industry's share dropped to 5.5% ($4.7 trillion). The contribution of tourism to world GDP in 2021 was 19% more than in 2020, but 46% less than in 2019. In 2019 the share of tourism in Russia's GDP was 4% (5,5 trn.rub.). That is comparable with the share of tourism in GDP of developed countries: the USA - 2,86 %, Great Britain – 3,6 %, Germany – 4 %, France – 7,38 %.

In 2021 the growth of international travels by 4%, compared with 2020, up to 415 million was noted. Compared with 2019, the figure was reduced by 72%.

The rate of recovery of the tourism industry in 2021 - 2022 will remain insignificant due to the varying degrees of covid restrictions and varying levels of vaccination in regions of the world, escalating military conflicts, rising energy and commodity prices, problems with logistics chains. Three regions saw the largest increase in arrivals in 2021 compared to 2020: the Caribbean, the Mediterranean, Central America (up to 60%), but a decrease of up to 50% compared to 2019. [13].

Due to pandemic restrictions, domestic tourism has become the predominant type of tourism in the country. The total flow of domestic tourists in Russia at the end of 2020, according to ATOR estimates, decreased by 35-40% – from 68 million trips in 2019 to about 40 million in 2020, with a slight recovery to 56 million in 2021.

Small and medium-sized service businesses suffered as a result of the pandemic restrictions. Value added to GDP declined for hotels and restaurants, cultural and sports institutions, and transportation companies. [2,4].

The weak growth rate of the world economy, the threat of recession affects the real incomes of households. Conducted by the European Trade Union Confederation (ETUC), the analysis of the economic situation of the population with incomes above and below the average from 2010 till 2020 has shown that 22 million workers in the European Union earn less than 60% of their average income Around 30% of citizens of the European Union above 16 cannot afford a trip for a summer vacation. Millions of workers receive the minimum wage guaranteed by law and are in a state of poverty in 16 EU member states[3].

A similar situation has developed in our country, according to a survey by the research center of the portal SuperJob. Ru, about a third of Russians in 2021 could not afford a week's vacation at the sea. In 2022, according to the portal Salary.ru respondents admitted that they save on vacation – 13%, cafes and restaurants – 12%, food – 9%, clothes and shoes – 7%, beauty salons – 7%.

A survey of Russian citizens carried out by the tutu.ru portal showed that in 2022 29% of respondents plan to spend their summer vacations at the country house, 26% plan to visit Black Sea resorts, 16% do not plan any vacations, 11% plan foreign tours, 8% visit the resorts of the Northern Caucasus and so on. [5].

In 2020-2021 the basic directions of development of tourist branch were based on budget, individual segment of internal tourism taking into account sanitary-and-epidemiologic restrictions [6,7,8].

These are sightseeing tourism, "micro-tourism" with departure for a couple of days to get acquainted with cultural sights (homestead, museum) for participation in craft workshops (making souvenirs, gastro-tours), ecotourism (planting trees, caring for wild animals), participation as volunteers in the improvement of infrastructure of tourist locations. Another direction is recreational tourism, connected with the prevention of diseases and restoration of health of citizens. It can be combined with freelancing called bleisure (from the words "business" and "leisure"). It involves combining work and vacation in places with a stable connection. People are offered to "look less but better," with the rejection of the race to visit all the sights. Its a concept of slow-tourism. Glamping (short for "glamorous camping") is gaining popularity among the adherents of automobile tourism, where more comfortable conditions of tent rest are offered[2,7,9].

The purpose of the study is to assess the attractiveness of the local recreational market in the North Caucasian Federal District in conditions of economic crisis, complicated by external economic sanctions, sanitary and epidemiological measures, the decline in incomes, the decline in demand for tourism industry services.

Research methods and objects. To perform the task we used the indicators characterizing the development of tourism and hospitality industry in the region proposed in our previous studies [1]. Indicators of regional development of the industry are presented in the form of stable structure indicators. Information sources included official statistics data, media publications, scientific papers, expert data, the results of sociological surveys, etc. To analyze the array of data, we used traditional methods of content analysis, comparison, grouping [1].

In All-Russian Classifier of Types of Economic Activity (OKVED) the sphere of hospitality includes: activities of hotels and catering companies, activities in the field of health and social services, activities in the field of culture, sports, leisure and entertainment. We used aggregated groups of data in the context of the federal districts of the North Caucasus Federal District and the South Federal District. Data for Moscow is given as a benchmark for the consumption of goods and services.

Indicators characterizing the development of the tourism and hospitality industry of the North Caucasian Federal District were compiled into two clusters reflecting:

– business activity (share of the economy sector in GDP, GRP %, investments in fixed capital, distribution of organizations and average annual number of employed by type of economic activity),

– living standards of the population (real money incomes of the population, the structure of consumer spending of households, and the distribution of paid services to the population by type of activity).

To realize the recreational attractiveness of the subjects of the North Caucasus Federal District and to attract investments in the region, the Russian government in 2010. - 2014 created the Federal Ministry of Affairs of the North Caucasus and development institutions JSC "North Caucasus Development Corporation" and JSC "Resorts of the North Caucasus", which were merged in 2020.

There is state program "Development of the North Caucasian Federal District until 2025" and sub-program "Development of tourism cluster in the North Caucasian Federal District", which provides funding of more than 2 trillion rubles. The Russian government has allocated 73 billion rubles for the development of tourism in the North Caucasus Federal District. Activities of development institutions were not effective, private investments could not be attracted in the planned volume: unemployment level remains within 10-11% (in Russia – 4.6%), average income per capita is 69% of the national Russian level. Therefore, the recreational infrastructure created in the years of the USSR is the "anchor" to attract tourists.[10].

Table 1 shows the dynamics of tourist flow in the regions of the North Caucasus Federal District. In the crisis year 2020 the tourist flow to the resort regions of the North Caucasus Federal District compared with 2019 decreased by the most in Stavropol Region to 35.6% and KVM - 33.3%.

In 2021 there was a partial recovery of tourist flow to 83,7% in Stavropol Region and 92,5% in the cities of CMW. Decrease of the tourist flow was not critical for the North Caucasian Federal District republics – 10 - 20%.

Table 1. Dynamics of tourist flow in NCFD regions

	2019	**2020**	**% к 2019**	**2021**	**% к 2019**
Stavropol region, mil.people	1,6	0,57	35,6	1,34	**83,7**

Caucasian Mineral Waters (including), mil. people	1,2	0,46	33,3	1,11	**92,5**
Kabardino Balkar Republic, mil. people	0,6	0,54	90	0,84	**140**
Karachay Cherkess Republic, mil. people	1,5	1,2	80	1,7	**113**
Republic of North Ossetia, mil. people	0,28	0,25	89	0.27	104

The main factors for the failure of the indicator were sanitary-epidemiological measures of the administration and the decline in incomes of the local population. Table 2 shows the geography of the tourist flow by regions of the North Caucasian Federal District.

Table 2. Geography of the tourist flow of the Caucasian Mineral Waters.

Indicators (percentage of total)	**2019**	**2020**	**2021**
Moscow	15,6	18	11,7
Moscow region	8,7	13	10,8
Stavropol region	25	14	6
Krasnodar region	9,5	6,3	7,2
Rostov region	12,6	9,5	6,3

Geography of tourist flow of CMW in 2019 - 2021 structurally changed insignificantly. These are mainly residents of the Central Federal District (Moscow agglomeration) and nearby regions of the Southern Federal District and the North Caucasian Federal District. During this period, the share of regions of the Southern Federal District and the North Caucasus Federal District decreased by 1.5-2 times. The share of residents of Moscow agglomeration decreased insignificantly.

Table 3: GDP (GRP) output structure by economic sectors

Indicators (percentage of total)	**RF**					**Moscow**				**NCFD**				**SFD**			
	2017	**2018**	**2019**	**2020**	**9мес 2021**	**2017**	**2018**	**2019**	**2020**	**2017**	**2018**	**2019**	**2020**	**2017**	**2018**	**2019**	**2020**
– hotels and catering establishments activities;	1,1	1,0	0,9	0.7	0,8	0,8	0,9	0,8		3,0	3,0	3,0		2,0	1,9	2,0	
–health care and social services;	3,9	4,1	3,5	4,1	3,6	2,8	3,0	3,0		6,2	7,1	7,2		4,4	5,0	5,2	
–culture, sports, leisure and entertainment activities.	0,9	0,9	1,0	1,0	1,0	1,2	1,1	1,3		1,1	1,1	1,1		1,2	1,1	1,3	

Table 3 shows the structure of output by sectors of the Russian economy. Gross Domestic Product (GDP) reflects the value of all goods and services produced during the reporting period in all sectors of the economy in the country for consumption, accumulation and export.

The structure of GDP by industry gives a clear picture of the share of a particular industry in the economy and its investment attractiveness.

Gross regional product is the value of all goods and services produced in a given territory during the reporting period. However, the sum of the GRP of all regions is not equal to the GDP of a particular country. This is due to the extraterritoriality of some industries.

GRP helps to assess the economic situation in a particular territory.

The indicator "Activities of hotels and catering enterprises" in the GDP of the Russian Federation for the period 2017-2018 is steadily around 1%. For the period 2019 -2021 with a tendency of monotonic decrease by 0.1-0.2%. The dynamics of this indicator in GRP of Moscow reflects the all-Russian trend. The share of hotels and catering enterprises in GRP of the North and South Federal Districts is higher than in the country as a whole, which reflects their recreational orientation in the division of labor. The dynamics of this indicator in GRP of these regions reflects the all-Russian trend.

The indicator "Activities in the field of health and social services" in the dynamics is within 4% in the country, in Moscow – 3%. The share of this indicator is higher in the regions of the North and South Federal Districts than in the Russian Federation, most likely due to underfunding of this sector.

The indicator of the activity in the sphere of culture, sports, recreation and entertainment in the regions of Russia by structure and dynamics is within the limits from 1.1 to 1.3%.

Table 4. Investments in fixed assets by types of economic activity

Indicators (percentage of total)	**RF**			**Moscow**			**NCFD**			**SFD**		
	2018	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**
– hotels and catering establishments activities;	0,15	0,2	0,3	1,3	0,38	0,5	0,3	0,08	0,6	1,0	2,7	2,5
–health care and social services;	0,2	0,19	7,1	0,01	1,4	2,6	6,0	5,4	7,7	2,3	3,4	5,1
–culture, sports, leisure and entertainment activities.	0,15	0,18	1,9	1,9	1,7	1,5	2,3	2,1	2,8	3,2	2,3	2,1

Table 4. shows the structure and dynamics of investment in fixed capital by type of economic activity. Direct investments are the engine of development of any economy. One of the forms of real investments are investments in production, machines, equipment, raw materials, real estate, etc. They create the basis for sustainable development of any kind of economic activity. Investments in fixed capital of hotels and catering enterprises for the period 2018-2020 at the all-Russian and regional level are in the range of 1%. This suggests that demand for these services is stable and does not imply expansion.

Investments in health care reflect the global trend to fight the pandemic and the implementation of national projects, so in 2020, spending increased sharply from 1.5 to 6 times.

Investments in the development of culture, sports, leisure and entertainment at the national and regional level have also increased significantly up to 2-3%.

The indicator "Distribution of organizations by types of economic activity", the dynamics of changes in their number allow to identify the main directions of economic development of the country and its regions.

Table 5. Distribution of organizations by type of economic activity

Indicators (percentage of total)	**RF**			**Moscow**			**NCFD**			**SFD**		
	2018	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**
– hotels and catering establishments activities;	2,3	2,3	2,5	2,4	2,8	2,3	1,7	1,8	1,9	3,2	3,5	3,6
–health care and social services;	2	1,8	1,8	1,3	1,3	1,5	3,3	3,5	3,9	2,5	2,6	2,9
–culture, sports, leisure and entertainment activities.	1,8	1,8	1,6	1,2	1,4	1,6	2,4	2,6	2,7	1,7	1,9	2,3

The dynamics of the structure of the indicator "Activity of hotels and catering enterprises" for 2018-2020 is monotonous in the range from 2 to 3%. In the SFD this indicator is more than 3%, which reflects the presence of sea climatic resorts. The indicator "Activities in the field of health and social services" in the regions of the North Caucasian Federal District and the Southern Federal District remains dominated by sanatoriums and resorts. The Cultural, Sports, Leisure and Entertainment Activities indicator also reflects the recreational nature of the regional economy. There is an excess of all-Russian indicators by 1.3-1.6 times in 2020.

Table 6.Average annual number of the employed by types of economic activity

Indicators (percentage of total)	**RF**			**Moscow**			**NCFD**			**SFD**		
	2018	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**	**2018**	**2019**	**2020**
– hotels and catering establishments activities;	2,4	2,5	2,5	2,2	2,3	2,4	2,4	2,5	2,6	3,2	3,4	3,4
–health care and social services;	6,2	6,2	6,3	3,6	3,7	3,8	6,7	6,8	7,0	6,9	6,9	7,0
–culture, sports, leisure and entertainment activities.	1,6	1,6	1,6	2,2	1,9	2,3	1,6	1,6	1,6	1,6	1,6	1,5

The indicator "Average annual number of employed by types of economic activity" reflects the structural features of the regional economy. It is sensitive to changes in the phase of the cycle of the economic system (growth or decline). Employment in the indicator "Activities of hotels and catering enterprises" in the country and regions in 2018-2020 shows stable figures from 2.2 to 2.6%, except for SFD from 3.2 to 3.4%. This shows the predominance of small and medium enterprises in this sector, which in 2020 received state assistance. On the contrary, a relatively high share of employment is observed in the indicator "Activities in the field of health and social services", which reflects sanitary-epidemiological measures and the implementation of national projects. Employment in the indicator "Cultural, sports, leisure and entertainment activities" is stable at 1.6 - 2%.

Table 7.Real cash income of the population

	RF				Moscow				NCFD				SFD			
	2018	**2019**	**2020**	**2021**	**2018**	**2019**	**2020**	**2021**	**2018**	**2019**	**2020**	**2021**	**2018**	**2019**	**2020**	**2021**
Real cash income (as % of previous year)	101,1	101,7	98,6	103,4	101,8	104,3	100,2	108,1	99,2	101	96,9	101	101,6	100,4	99,6	102,9

Table 7 shows the indicator "Real money income of the population" reflecting the standard of living in the country. This indicator reflects the ability of citizens to purchase goods and services on their income.

From 2018 to 2019, the real income of citizens grew insignificantly in the range of 1%. In 2020, there is a decrease in income in the country and by regions by about 4%, but in 2021, the level of 2019 is reached. The decrease of real incomes of the population is caused by the sanitary-epidemiological measures and the economic recession.

Table 8.Structure of consumer expenditures of households**:**

Indicators (percentage of total)	RF				Moscow				NCFD				SFD			
	2018	**2019**	**2020**	**3кв 2021**	**2018**	**2019**	**2020**	**3кв 2021**	**2018**	**2019**	**2020**	**3кв 2021**	**2018**	**2019**	**2020**	**3кв 2021**
- food costs	35,2	34,6	36,0	35,1	30,1	25,9	34,3	27,9	41,8	41,1	43,4	45,9	38,1	39,2	39,1	38,5
- expenses for non-food items	36	35,8	36,6	35,9	35,8	38,7	28,8	31,9	34,6	36,4	36,3	34,1	34,2	32,9	35,0	36,2
- service costs:	27	27,8	25,5	27,3	32,2	33,7	34,1	38,4	22,9	21,7	19,5	19,2	25,9	26,3	24,2	24
- hotels, cafes and restaurants	3,4	3,4	2,7	3,2	5,7	5,2	5,5	3,0	1,7	1,8	1,0	1,9	3,8	3,9	2,8	2,7
- organization of recreation and cultural events	7,5	8,1	6,2	6,8	11,0	13,5	6,1	11,5	5,0	3,8	3,0	3,4	5,2	5,1	4,3	4,2
- healthcare	3,6	3,7	3,8	4,2	3,1	3,4	3,3	3,9	3,9	3,4	3,8	3,5	4,0	3,7	4,4	4,5

The indicator "Structure of consumer expenditures of households" is shown in Table 8. This indicator affects the quality of life, recreation, education, health (human capital).

The level of household consumption is closely related to the level of income:

– the lower the income of the population, the higher the expenditure on food, the less is left for the accumulation of human capital,

– stable growth of incomes of the population leads to the fact that spending on non-food products grows faster, while spending on food decreases,

– high incomes of the population lead to an increase in spending on services compared to expenditures on non-food goods.

Between 2018 and 2020, household spending across the Russian Federation reflected stagnant income: spending on non-food items grew slightly faster than spending on food, while spending on services declined. However, spending on food, non-food items was more than 30% (this is a critical level), which was compensated by lower consumption of services (hotels, cafes and restaurants, recreation and cultural events). For the 3rd quarter of 2021 there was a weak tendency of decrease in expenditures on food, non-food products and slightly higher consumption of services.

For Moscow during Q3 2021 expenditures on services were growing faster than those on food and non-food products. In the North and South Federal Districts, the consumption pattern over the period from 2018 to 2021 showed a more significant drop in consumption of services in favor of expenditures on food.

Table 9. Distribution of paid services to the population by type

Indicators (percentage of total)	RF				Moscow				NCFD				SFD			
	2018	2019	2020	3кв 2021	2018	2019	2020	3кв 2021	2018	2019	2020	3кв 2021	2018	2019	2020	3кв 2021
- hotels and accommodation facilities;	3,3	3,2	2,0	2,8	3,5	4,7	1,7	2,6	1,2	1,1	1,1	1,8	6,3	6,5	7,0	2,7
- culture; physical education and sports;	16,1	19,1	0,8	17,1	24,7	33,1	0,9	24,5	11,0	8,0	0,6	9,8	8,3	9,0	1,2	10
- medical services	7,9	5,3	7,7	6,2	5,2	6,1	8,1	6,2	7,6	7,2	7,5	6,2	5,6	5,5	5,9	7,2
- sanatorium and health services	2,3	1,5	0,9		0,7	1,1	0,1		3,0	1,2	3,6		3,1	1,2	3,1	

The consumption of paid services by households with different income levels is standard. These are housing and communal services, medical, sanatorium-health-improving and educational services, transport and communication, culture; physical culture and sports.

Consumption by households of different paid services by volume and quality can vary considerably (Table 9). Citizens can rank their needs depending on their ability to pay, i.e. their income. If the demand for non-food products and services in general will fall during the economic downturn, the demand for medical, sanatorium and health services and educational services remains constant.

If the consumption of the upper middle class is relatively inelastic, the poor and relatively poor segments of the population will reduce it. The cost of services reacts to crises in the economy with a longer lag (time lag) than the cost of goods. With the recovery of economic growth there may be an outstripping growth in demand for services.

In 2020 in the Russian Federation there was a decrease in demand for services of hotels and accommodation facilities, culture, physical culture and sports, for medical services it remained stable, except for regions of the South Federal District on services of hotels and accommodation facilities (there was an increase, as these services were consumed by the local population). In the 3rd quarter 2021 there was a partial recovery of the demand on hotels and accommodation, culture, sports and fitness services, except for the regions of the South Federal District by hotels and accommodation services (a decrease in demand on the local level was observed).

Conclusions. There is a deepening of the trends described in our previous research. Under the influence of external factors (continuing pandemic, military conflicts, economic sanctions) households change their behavioral model of consumption and begin to save on the choice of goods and services. The population's incomes continue to decrease and, as a consequence, the share of the middle class in society, as the main consumer of hospitality industry services, is decreasing. The main demand for these services is formed at the expense of the population of raw material regions and the Moscow agglomeration. There is a growing demand for cheap tours, "micro-tours" and destinations (not far from home). An important factor reducing the demand for travel services is transport accessibility. There are problems with air and rail passenger transportation due to economic sanctions, which limit all types of tourism. Domestic tourism will be limited geographically within federal (economic) districts, within a radius of 500 - 1000km. This allows a wide use of road transport (personal cars, buses). Recreational services to restore the health of the population of the region will remain in demand. The resort regions of the North Caucasus and South Federal District have competitive advantages: all-season availability, developed sanatorium and resort infrastructure and qualified personnel.

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