

Russian Federation

Tourism in the economy

In 2017, tourism contributed RUB 3.2 trillion to the economy, equivalent to 3.8% of Russian GVA, and an increase of 21.4% from 2016. The tourism industry in Russia employed 540 500 people in 2017.

The number of international visitor arrivals recorded in 2018 was 24.6 million, up 0.7% over 2017. The main source markets were Ukraine (with a 33.4% market share), followed by Kazakhstan (14.3%), and China (6.9%). Other key markets include Finland, Azerbaijan, Poland and Germany. Based on accommodation statistics, 11.5 million overnight visitors were recorded from international markets in 2018, representing a 43% increase compared with the previous year.

The number of domestic arrivals recorded in 2018 was 62.2 million, an increase of 16.2% from 2017. Inbound and domestic tourism are driven by a range of activities, the most popular including sports (particularly skiing), education, business, medical, cruises, fishing and hunting, events and gastronomy. In addition to traditional tourism in Russia, new forms of tourism are emerging, including more innovative, tailored and experience-based offers.

Tourism governance and funding

The main body responsible for Russian tourism policy is the Ministry of Economic Development, where a special Department of Tourism has been established. Until 2019, the Ministry of Culture fulfilled Russia's tourism functions (through the Federal Agency for Tourism), but these functions were moved to the Ministry of Economic Development due to the increasing importance of tourism for the overall development of the country.

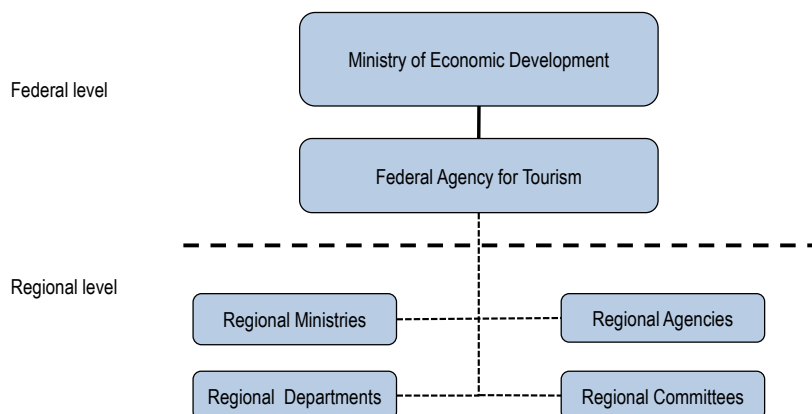
The Federal Agency for Tourism, now under the jurisdiction of the Ministry of Economic Development, oversees the regional tourism agencies, which are responsible for the following:

- the development of strategic planning documents,
- the creation and maintenance of favourable conditions for the development of the industry,
- access to tourist resources, communications and assistance,
- tourist information centres,
- navigation and orientation systems,
- organisation of research in the field of tourism, and
- events supporting tourism development priorities.

The Ministry of Economic Development collaborates with a wide range of other federal executive bodies in its activities, particularly in the areas of tourism policy development, training, tourist safety, infrastructure, and data collection. Other collaboration includes the ministries of selected regions for the development of tourism in specific areas, as well as interested ministries in the development of, for example, ecotourism, cultural, sports, rural and children's tourism.

The total state budget for tourism for the next three years is RUB 6.6 billion, allocated for 2020, increasing to RUB 13.1 billion in 2021 and RUB 12.4 billion in 2022. The majority of the national budget is allocated to three priority areas: infrastructure development and implementation of tourism investment projects (84% of the overall budget); support for tour operators whose activities are aimed at the development of inbound tourism (10%); and improving the quality of the tourist product (6%). The average budget allocated for the activities of the central office of the Federal Agency for Tourism (and regional tourism agencies) is RUB 134 million per year for the three-year period from 2020 to 2022.

Russian Federation: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of Economic Development, 2020.

Tourism policies and programmes

The main task of the Ministry of Economic Development and the Federal Agency for Tourism is the comprehensive development of domestic and inbound tourism. Their aim is to achieve this by creating the necessary conditions for the development and promotion of high-quality tourist products that are competitive in both domestic and global markets. In addition, the Ministry and Federal Agency aim to strengthen the social role of tourism, increasing the availability of tourism and recreation services for residents of the Russian Federation. In the development of tourism, both authorities take into account the environmental and socio-cultural impacts as well as the need to ensure the safety of tourists.

The state priorities and objectives for tourism are set out in the Tourism Development Strategy and Action Plan for the period until 2020. The main national policy priorities are to:

- Create a competitive tourist product,
- Plan the development of tourist areas,
- Provide associated infrastructure and transport,
- Further develop tourist and support infrastructure,
- Foster training and education development,
- Develop new digital solutions,
- Remove existing barriers and increase investment attractiveness,
- Stimulate demand for tourist products,
- Facilitate visa regimes,
- Promote and raise the visibility of the tourist product,

- Develop sustainable demand and increase the availability of tourist products,
- Ensure greater tourism security.

The Action Plan includes a wide range of measures focused on various interconnected issues such as travel facilitation, industry and product development, marketing and promotion, skills and human capital development, and infrastructure investment. A new Tourism Development Strategy for the period to 2035 is currently being developed and is expected to be adopted at the end of 2019.

The main objectives of the new Tourism Development Strategy build on the previous framework and include:

- the creation of a competitive tourist product for the Russian Federation,
- stimulation of demand and increase of availability of the Russian tourist product in domestic and foreign markets,
- improvement of the regulatory framework, taking into account development trends of the tourism industry, and,
- improvement of the tourism management system in the Russian Federation, including the system of collecting, processing and analysing statistical data on the development of tourism.

Looking forward, Russia is focusing on increasing the social importance of tourism by strengthening the role of tourism in education, ensuring inter-cultural communication, inter-regional and international linkages and communication in the development of tourism; as well as the development of tourism products, which take into account the natural, cultural, and ethnic diversity of the regions of Russia.

Creating a competitive tourist product in Russia

Russia is focusing on improving the competitiveness of tourism products by developing stronger brand awareness and attractiveness, improving the quality of tourist services and increasing their accessibility for domestic and inbound tourists. The aim is to maximise the positive experience for tourists.

The improvement of quality of tourism services is planned through:

- The modernisation and development of tourism infrastructure, the urban environment and public spaces.
- Improving the quality of training for workers in the tourism industry.
- Close co-ordination with business representatives and regions to enable joint planning in the development of tourist areas.
- Monitoring the quality of tourism products, disseminating best practice and setting mandatory service standards.

Improving the accessibility and availability of tourist services is planned through:

- The development of transport infrastructure and passenger transportation systems to tourist areas.
- The development of digital platforms.

Statistical Profile

Russian Federation: Domestic, inbound and outbound tourism

	2014	2015	2016	2017	2018
TOURISM FLOWS, THOUSAND					
Domestic tourism					
Total domestic trips	..	..	..	..	..
Overnight visitors (tourists)	33 799	43 657	48 339	53 534	62 210
Same-day visitors (excursionists)	..	..	..	..	..
Nights in all types of accommodation	184 018	212 195	216 838	253 023	278 984
Hotels and similar establishments	84 119	100 156	115 175	135 905	155 963
Other collective establishments	99 899	112 039	101 663	117 117	123 020
Private accommodation	..	..	..	..	..
Inbound tourism					
Total international arrivals	25 438	26 852	24 571	24 390	24 551
Overnight visitors (tourists)	..	..	..	..	..
Same-day visitors (excursionists)	..	..	..	..	..
Top markets					
Ukraine	8 436	8 912	8 569	8 723	8 202
Kazakhstan	3 733	4 711	3 564	3 485	3 510
China	874	1 122	1 289	1 478	1 690
Finland	1 380	1 416	1 319	1 017	950
Azerbaijan	818	856	898	876	893
Nights in all types of accommodation	..	..	..	..	..
Hotels and similar establishments	..	..	..	..	..
Other collective establishments	..	..	..	..	..
Private accommodation	..	..	..	..	..
Outbound tourism					
Total international departures	..	..	..	..	..
Overnight visitors (tourists)	42 921	34 390	31 659	39 629	41 964
Same-day visitors (excursionists)	..	..	..	..	..
Top destinations					
Turkey	4 216	3 460	797	4 520	5 719
Finland	4 283	3 067	2 894	3 333	3 361
Kazakhstan	3 330	3 125	2 850	2 978	2 955
Ukraine	2 558	1 657	1 804	2 283	2 290
China	1 731	1 284	1 676	2 003	2 018
TOURISM RECEIPTS AND EXPENDITURE, MILLION USD					
Inbound tourism					
Total international receipts	19 451	13 186	12 822	14 982	18 670
International travel receipts	11 759	8 420	7 787	8 945	11 486
International passenger transport receipts	7 692	4 766	5 035	6 038	7 184
Outbound tourism					
Total international expenditure	55 382	38 432	27 654	35 584	38 791
International travel expenditure	50 428	34 932	23 952	31 058	34 271
International passenger transport expenditure	4 954	3 500	3 702	4 526	4 520

.. Not available; | Break in series

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078851>

Russian Federation: Enterprises and employment in tourism

	Number of establishments ¹	Number of persons employed ²				
	2018	2014	2015	2016	2017	2018
Total	..	..	..	..	..	..
Tourism industries	..	440 483	419 893 |	507 978	540 521	..
Accommodation services for visitors	28 072	399 146	402 577 |	468 009	493 305	..
Hotels and similar establishments	21 300	151 076	153 975 |	221 232	217 909	..
Food and beverage serving industry	85 408	..	..	..	..	..
Passenger transport	..	..	..	..	..	..
Air passenger transport	..	..	..	..	..	..
Railways passenger transport	..	..	..	..	..	..
Road passenger transport	2 781	..	..	..	..	..
Water passenger transport	187	..	..	..	..	..
Passenger transport supporting services	..	..	..	..	..	..
Transport equipment rental	..	..	..	..	..	..
Travel agencies and other reservation services industry	13 674	41 337	17 316	39 969	47 216	..
Cultural industry	..	..	..	..	..	..
Sports and recreation industry	..	..	..	..	..	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
Other industries	..	..	..	..	..	..

.. Not available; | Break in series

1. Data refer to number of enterprises.

2. Data refer to number of employees.

Source: OECD Tourism Statistics (Database).

StatLink  <http://dx.doi.org/10.1787/888934078870>



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