Analysis of Key Indicators of Tourism Industry in Russia

Maloletko, A. N.[1], Kaurova, O. V.[1], Kryukova, E. M.[1], Pochinok, N. B.[1] & Gladko, E. A.[2]

[1] Russian State Social University, Moscow, Russia

[1,2] Russian State University of Tourism and Service, Pushkinsky district, Moscow Region, Russia

Correspondence: Maloletko, A. N., Russian State Social University, Moscow, Russia. E-mail: mtrushin@mail.ru

Abstract

Tourism sector currently represents a complex system with a variety of economic ties, which attracts ever-increasing volumes of material, financial and human resources. It brings together a large number of industries, the functions of which is to meet the growing demand for different types of tourism and recreation. The article describes the main indicators of the dynamics of the Russian tourist market dynamics for five consecutive years combined.

Keywords: tourism industry, analysis of indicators of tourism, the tourist flow

1. Introduction

One of the most significant, permanent and long-term trends, accompanying the formation and development of the world economy - a steady increase in the impact of tourism on the global economy as a whole, and on the economies of individual countries and regions. Becomes apparent transformation of tourism in the largest single sector of the national economy, which seeks to meet the specific needs of the population. The variety of these needs are satisfied not only tourist enterprises, but also companies in other industries, which makes the importance of tourism as a factor of the multiplier effect on the economy. Tourism is one of the factors of global integration processes, and the tourist business is now becoming a significant sector of the economy. According to the World Tourism Organization (WTO) and the International Monetary Fund, tourism since 1998 came in first place in the world exports of goods and services. According to the forecasts of the WTO in the coming decades the growth rate of tourism remain (Tourism Highlights. Edition 2011. World Tourism Organization, Madrid, 2011).

Russia, in spite of the rich tourist resources, occupies a small share of global tourist flows. According to estimates of the WTO, the potential of Russia allow you to take up to 40 million. Foreign tourists per year, which is 5 times more than today.

The study of tourism requires the calculation and analysis of quantitative indicators, which are based on statistical data. Therefore, the problem of statistical records are central to the study of tourism. The first of these - the comparability of databases. It suggests the possibility of comparing the information in order to identify trends, patterns of tourism development; changes taking place in it, in space and time; assessment ratio of the quantities of similar indicators related to different countries, etc. Statistical data are often not comparable due to differences in their methods of calculation or measurement units (Ovcharov, 2009).

Another problem of tourism statistics - lack of full and detailed statistical information. Currently, no state is systematic observation of tourism in its entirety. In the statistics of tourist flows information about sightseeing and business trips short fragmented; Statistics of tourism expenditure is also not exhaustive. An important problem is the timely provision of information, as market participants - firms, hotel enterprises, spa facilities - spend contractual campaign and start selling before coming statistics on current market conditions and the results of the previous season (Karmanova et al., 2014).

The completeness and comparability of statistical information appear in a new light when conducting studies of the macroeconomic impact of tourism. Evaluate the significance of tourism as an important industry, providing faster economic growth and higher levels of employment in Russia, - the most important task of tourism statistics. Her decision is complicated because of the imperfection of statistical accounting methodology, the cause of which is rooted in the tourism industry itself, its complex and atypical for various nature (Salehizadeh,

M. & R. Taylor, 1999).

In Russia, the issues of tourism statistics are poorly understood, although there are works of Russian scientists in this direction. Flawed methodology to assess tourism market, there is no uniform system of statistical indicators tourism market. The most significant drawback of the tourism industry - the lack of a stable, clear and unified international scale information base regarding the economic impact of tourism. The narrowness of the knowledge base, the lack of methodological uniformity and comparability with those of other industries have led to an underestimation of the economic role of tourism. Although the importance of the tourism sector for the Russian economy is obvious, it is not sufficiently integrated in the statistics (Kaurova et al., 2014).

2. Method

The study was performed on the basis of the State Statistics Committee of the Russian Federation on the state and development of tourism in Russia as a whole and by regions in the dynamics from 2008 to 2012, also served as a source of information materials sample surveys organizations involved in tourism activity by region for 2000 (Revyakina, 2012).

Methodological and theoretical work formed the basis of the works of Russian and foreign scientists, the provisions of the economic theory of the market economy, the general theory of statistics and mathematical statistics, methodological recommendations to the UN SNA, as well as other international organizations (WTO, IMF, OECD, EEC, etc.), Methodological development of the State Statistics Committee of the Russian Federation, materials of scientific seminars and conferences (Kaurova et al., 2014).

The study used a variety of statistical techniques needed to achieve the objectives of the study and due to the presence of information: summary, grouping; graphical method; absolute, relative and average values; correlation and regression analysis, statistical forecasting methods. Data processing was carried out using modern computer technology-based PC using the software packages of statistical information: «Statistica», «Microsoft Word 7.0», «Microsoft Excel 8.0».

Analysis of macroeconomic indicators of tourist industry in Russia is complicated due to the lack of a unified methodology for the evaluation of statistical indicators. This problem was noted in the study of the Russian market of tourist services on the World Council of Travel and Tourism (WTTC). Experts WTTC estimated absence Industry Statistics System as limiting factor for development of tourism. Thus, it is reasonable to begin the analysis of the tourism industry in Russia with the balance of payments of the Russian Federation (Webster, C. and S. Ivanov, 2014; Lilea, F. P., 2013.).

3. Result

Currently, the major factors hindering the growth of competitiveness of the Russian Federation on the international market of tourist services and, as a result, prevent the implementation of its tourism potential, are:

- poorly developed, and in some regions there was no tourist facilities provide the infrastructure that is an obstacle to attracting private investment in the tourism sector;

- low level of development of tourist infrastructure (failure, and in some cases the lack of accommodation facilities and tourist-class leisure facilities, the poor state of many tourist sites of the show, the lack of quality road infrastructure almost all the highways of the country);

- lack of affordable long-term debt instruments to investors with interest rates, allowing recoup investments in objects of tourist and recreational complex in terms acceptable to the investors;

- not low quality of service in all sectors of the tourism industry due to a lack of professional staff;

- lack of promotion of tourism product of the Russian Federation on the international and domestic tourism markets.

Overcome these sectoral restrictions can not be only due to the use of market mechanisms without the active participation of coordinating with the government, which is currently fragmented and does not have a decisive influence on the positive change in the situation. In the short term failure of state support in the tourism sector in the Russian Federation may lead to:

- further reduce the competitiveness of Russian tourist product on the domestic and international tourist market (including by reason of deterioration of tourist infrastructure and the low quality of tourist services);

- reduction of domestic and inbound tourism flows and, as a consequence, reduce the tax and other revenues to the budget system of the Russian Federation;

- reduction in the level of employment in the tourism and related industries, as well as a decrease in household

incomes;

- increase in outbound tourist flow and deterioration of the balance of payments of the country.

4. Discussion

The variety of properties and characteristics of tourism activity requires the use of a system of indicators to cover various aspects of activities of tourism enterprises in the industry in general, including the quantitative and qualitative sides. The system unites the performance of macro- and micro-levels.

The macro level includes: the number of nights, duration of stay, the number of arrivals (Disposals), the number of trips, the income from the admission of the foreigners, foreign guests, private citizens, domestic tourism.

The indicators of tourism development at the micro level belong to:

- the volume of tourist flow;

- the volume of tourism expenditure;

- the state and development of material-technical foundation;

- the indicators of financial and economic activity;

- the indicators of the development of international tourism.

The characteristics of the main macroeconomic indicators of tourism in the Russian Federation is provided in paragraphs 4.1.-4.3., the characteristic of microeconomic indicators is exposed in paragraphs.4.4., which can be considered on the example of a particular region, in our case the Murmansk region of the Russian Federation.

4.1 The Dynamics of Economic Performance of Tourism in Russia

Table 1 shows the evolution of the main indicators in the field of tourism for 2008-2012 (all amounts are presented at the end of the year). Since the end of the restructuring the number of Russian travel agencies increased rapidly until the 1998 crisis did not leave on the market the most financially stable companies. But in recent years the situation changed again in the direction of market saturation travel agencies. As of July 1, 2010, the number of travel agencies in Russia is 4178 units (included in the Unified Federal Register of Tour Operators). In 2012, the number of travel agencies has decreased to 4685 units registered in the Unified Federal Register of Tour Operators). The appeal is caused by relatively small upfront investment, a minimum number of staff and the apparent simplicity of the problem. However, business in this industry is accompanied by a sufficient number of risks that could bankrupt the investor.

Table 1. The dynamics of economic performance of tourism in Russia

Indicator	Years				
	2008	2009	2010	2011	2012
1	3	4	5	6	7
Tourist flow, th. trips:					
entry	2295	2101	2134	2336	2570
entry	11314	9542	12605	14496	15332
The number of hotels and other accommodation facilities, units.	6774	7410	7866	8406	9316
The foreign trade turnover, mln. dollars.	763464	495191	649264	845842	864934
The foreign trade turnover (WTO), tourism services, mln. dollars.	36834	30060	35256	43623	53557
The share of tourism services in the total amount of the WTO goods and services,% *	4,82	6,07	5,43	5,16	6,19
Paid services, bn. rub .:	4079603	4504455	4943482	5540168	6036839
Travel	72975	78228	82246	112821	121545
Health and health services	58125	61090	60523	68521	75622
Services of hotels and similar accommodation	107524	105904	111737	125529	141012
Price indices,% **					
Health and health services	121,2	109,5	105,4	109,0	106,7
Excursions	122,3	110,1	104,8	106,5	106,1

Notes. * Indicator of the share of travel services designed according to the article "Travel" current account balance of payments of the Russian Federation. ** December to December of last year.

Recently there has been growth in most economic indicators tourism. At the same time, outbound tourist flow is much higher than the number of incoming tourists. The prerequisites for this is the low level of attractiveness of domestic tourism and local recreation areas, high prices for services, as well as the seasonality of the tourism product in Russia. The process of increasing the flow of outbound tourists progresses, so, if in 2008 the exit flow exceeded 4.93 times in the entry, then in 2012, there is already in excess of 5.96 times. Since this difference is mainly due to the increase for the citizens of the Russian Federation abroad, we can say, first of all, the need to develop domestic tourism to increase the contribution of the tourism industry in the country's GDP. The flow of tourists has decreased in the crisis year of 2009, a further increase in performance continued in 2011.

4.2 The Impact of Economic Indicators of Tourism in Russia by the Number of Hotels and Similar Accommodation (Kryukova and Sokolova, 2014)

In the amount of accommodation as there is a positive growth. Total number of hotels and similar accommodation facilities increased from 2008 to 2012 to 2542 units or 27.29%. One-time capacity of accommodation in 2012 amounted to 617.8 thousand. Places. However, the load factor of domestic hotels usually hovers around 0.35-0.40, indicating that the lack of effectiveness of their work. Selected hotels in Central Russia (especially in Moscow and St. Petersburg) have higher load factors. In international practice, is considered an effective loading of the hotel within 0.65 (The official site of the Federal Service for State Statistics, 2012).

The table shows that the share of tourist services in the total foreign trade turnover is significant. Volume of services provided by all three groups (tourism, health and leisure and services of hotels and similar accommodation) increased during the study period. Greater growth rate observed in the tourist services in the period 2008-2012. average annual increase of this index 14.31%, with the highest growth was recorded in 2011 compared with 2010. In the total volume of paid services to the population share of tourist services does not exceed 2.04% (in 2011), the lowest proportion of tourist services in the total volume in 2010 (1.66%).

The share of services related to tourism and recreation in the total volume of paid services is 5,15-5,85%. The minimum value of this index (5.15%) was observed in 2010, the maximum (5.85%) in 2008. Also increased the volume of services per capita:

- tourist services with 511.2 rubles. in 2008 to 848.8 rubles. in 2012 (an increase of 66, 04%),

- services of hotels and similar accommodation with 753.3 rubles. in 2008 to 984.7 rubles. in 2012 (an increase of 30.72%) (The official site of the Federal Service for State Statistics, 2012).

4.3 Characteristics of the Exports and Imports of Tourism Services

Import on the tourist market of Russia in 2008-2012, is developing dynamically. However, the same can not be said about the export. This is mainly due to the ratio of "price-quality", which is not in favor of the domestic industry. Even for domestic tourism, there are many obstacles. For example, in recent years, declining market services of cultural institutions. By this leads to both a lack of funds from the population, and the gap between the catastrophic possibilities of access to cultural values and information resources in major cultural centers and provinces. In 2011, the services of cultural institutions decreased by 5.4 percent. By number of visits per resident cultural institutions Russia lags behind developed countries, so in our country, this figure by visiting the museum is 0.6, whereas in Austria - 1.7 Germany - 1.2, Japan - 1.0. By going to the cinema and the low level of the index - in Russian 0.4, Austria - 1.8 Germany - 1.7 Japan - 1.3 (On the results of socio-economic development of the Russian Federation in 2011, 2012).

Also, the domestic tourism is directly dependent on the market conditions of sanatorium services. (Chakravarthy, 1986) The main influence on the development of health and health services have a material and technical base and the cost of permits. Last years there was a reduction in the sanatorium organizations and, accordingly, the number of outstanding individuals. In 2010, the number of sanatorium organizations decreased compared to 2009 by 52 units, and the number of seats in them to 5364. average cost of stay of one day in a nursing home in 2011 amounted to 1,561.61 rubles. increased compared to 2010 by 4.8%, in rest homes and boarding houses, respectively - 1,168.45 rubles. and 1.6 per cent (On the results of socio-economic development of the Russian Federation in 2011, 2012).

Accommodation facilities - hotels and similar accommodation facilities (motels, boarding houses, hostels for visitors and others.) And specialized accommodation facilities (spa organizations, recreational, tourist and others.) - Prominent place in the tourist infrastructure. (Brida and Risso, 2009) The cost of tourist product, as measured by the cost of travel agencies in the organization of tours, the share of expenditure on the acquisition of third party services on placement and residence is more than 50 percent.

Table 2. Export and import of tourist services

Indicator	Years				
	2008	2009	2010	2011	2012
Trade balance of tourist services (WTO), mln. dollars.	-12946	-11466	-17757	-21068	-32039
export	11944	9297	8830	11398	10759
import	24890	20763	26587	32466	42798
The foreign trade turnover (WTO), tourism services, mln. dollars.	36834	30060	35417	43864	53557
The share of tourism services in the total amount of the WTO goods and services,% *	4,82	6,07	5,43	5,16	6,19

Russia's domestic tourists prefer inexpensive and high-quality hotel rooms - small hotels with an average room rate of 60 - $ 90. Per night, including breakfast. Increased demand for hotels of category 3 - 4 stars. In 2011, the amount of the provision of services of hotels and similar accommodation facilities increased in comparison with 2010 by 0.9 percent. (On the results of socio-economic development of the Russian Federation in 2011, 2012; Report about the collection of taxes and fees in the budget system of the Tver region for 2007-2011).

Export represents the aggregate of the costs incurred by citizens (residents) of a particular country in the territory of the Russian Federation, the import - the cost of Russian citizens in other countries. Following the procedure of RSSS data are presented under "Travel" balance of payments and do not include transport services in international transport between residents and non-residents. According to the Balance of Payments Manual of the International Monetary Fund, they are classified as "transport services (passenger)" and stand out as a separate item. Methodologically export and import under "Trips" are calculated as the sum of the costs of categories of travel (tourism, business and private travel, temporary employment, transit, travel attendants). The amount of funds expended for each type of trip is defined as the product of unit costs by the number of emigrants (entrants) persons. The latter figure is considered on the basis of the Border Service of Russia and the Federal Migration Service. Travel costs are calculated based on the average value of tourism trips by country, the cost of living in collective accommodation facilities in our country, as well as estimating the cost of personal goals for travel. Information base includes monitoring official statistics, surveys of regional tourist agencies, information of the partner countries to the World Tourism Organization (UNWTO) and the media.

The data in Table 2 suggest a significant increase in imports of tourism services. Increase of the rate in 2012 compared to 2008 is 71.95%, this export performance decreased by 9.92%, respectively, and the balance of trade of tourist services between exports and imports has been steadily increasing in the negative direction. During the study period, the proportion of tourist services in the total amount of goods and services to the WTO remains at an average of 5.4%, which, in spite of the raw material orientation of Russian exports and the low proportion of tourist services in the structure of the balance of payments is a positive trend for the tourist market. Thus, in 2011, exports of goods exceeded exports of services at 9, 66 times and amounted to 522.011 billion. Dollars., While services exports 54.025 billion. Dollars. Imports of goods in 2011 exceeded imports of services by 3.6 times (imports of goods amounted to 323 831 Mln. dollars. import of services - 89972000000. dollars.), (Statistical Yearbook, 2012).

By the number of total costs of Russian citizens in 2008 were in the lead, Finland, Turkey, Egypt, Germany, Ukraine. Due to the unstable situation in Egypt, the country dropped from the list in 2011. At the same time, at the expense of cheaper travel, came to the fore Turkey, which made 2681 thousand missions (The official website of the Federal Tourism Agency of the Ministry of Culture, 2012). Second place went to China with a total of 1,502 thousand. Tourist trips. The total number of expenses compatriots in the top five ranking in 2011 was 12.275 billion. Dollars. (See Figure 1), while foreign nationals from countries ranking leaders produced costs only 4.415 billion. Dollars (See Figure 2).
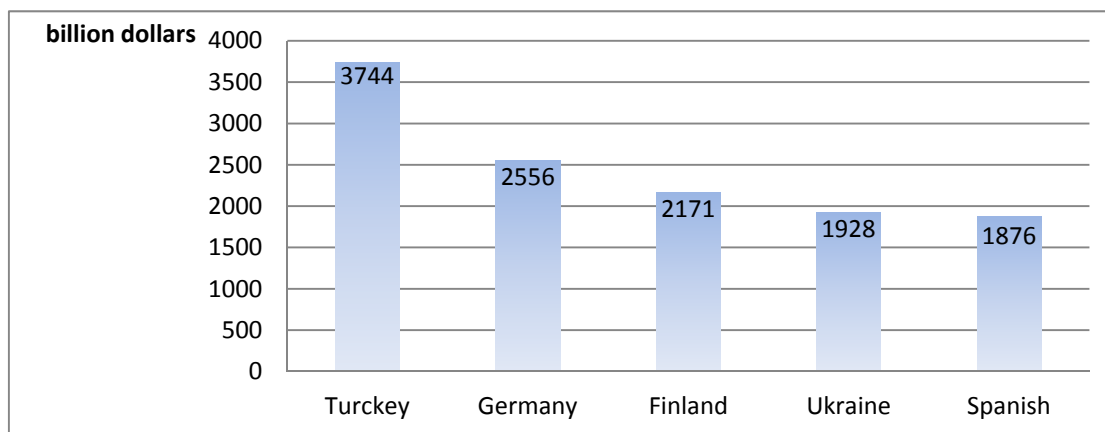
Figure 1. Non-citizens of the Russian Federation under "Travel" in 2011
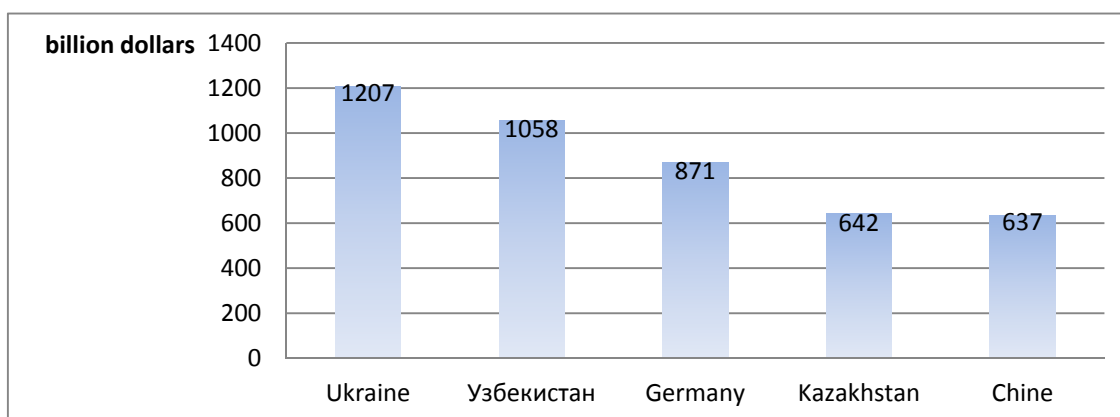

Figure 2. Costs of foreign citizens in the Russian Federation under "Travel" in 2011

Table 3. Factor analysis of the export and import of tourist services under the "Trips", mln. dollars

	2010 years	2011 years	Total (increase (+), decrease (-))	including by: changes in the number of trips	changes in the cost of one trip	structural changes
Export	8830	11328	2497	1187	1398	- 87
Import	26425	32295	5870	3114	1663	1094
Turnover	35256	43623	8367	4300	3061	1006
Balance	- 17595	- 20968	- 3373	- 1927	- 265	- 1181

Necessary to analyze the factors increasing the export and import of tourist services. In 2011, the number of foreigners who visited the Russian Federation, was 31.0 million. Persons (13% more than in 2010) (Balance of Payments and External Debt of the Russian Federation, 2012). Most of the people who entered the country in 2011, arrived with the service purposes (40.82% or 3753 thousand. Trips) for tourism - 24.23% (2,025 thousand. Trips) on private trip had 23.07% (2,121 thousand. trips). For comparison, in 2010, business trips accounted for 36.7% (3035 thousand. Trips), enter as tourists - 24.5% (2,025 thousand. Trips), private travel amounted to 26.3% (2,174 thousand. Trips) (Russia by the Numbers, 2012). On business trips account for the largest number of trips, while the inflow of foreign nationals for temporary employment. Incoming flow of citizens in neighboring countries in 2011, compared with 2010 increased by 15%. Most significantly increased the influx of citizens of Uzbekistan (39%), Moldova (24%), Armenia (20%). From foreign countries during the analyzed period the territory of Russia visited by 11% more people. The greatest increase observed trips from Poland (78%), Finland (20%), Spain (17%) (Balance of Payments and External Debt of the Russian Federation, 2012).

The number of Russian citizens who went abroad in 2011 compared with 2010, increased by 12% and amounted to 40.7 million. Persons. Citizens of Russia in 2011 mainly went for tourism purposes (48, 01% or 14 052 thousand. Trips), followed by a trip to go private purposes - 40.87% (11 962 thousand. Trips), business trips accounted for only 4, 11% (1203 thousand. trips). In 2010, visiting foreign countries as tourists amounted to 47.99% (12,231 thousand. Trips), private visits 39.97% (10,188 thousand. Trips), official visits of 4.44% (1,133 thousand. Trips). Accordingly, the percentage of the comparison of 2010 and 2011 by purpose of travel of Russian citizens abroad has changed slightly. In absolute terms, in 2011, a significant increase in the number of tourists who left (na1821 thousand. Trips), the flow of attending a private visit (to 1774 thousand. Trips) and decreased the number of business trips (by 70 thousand. Trips). Leading the country hosting the Russian tourists in 2011 were Finland (4.4 million. Persons), Turkey (3.3 million. Persons), China (2.4 million. Persons), Egypt (1.7 million. People), (Russia by the Numbers, 2012; Conclusion of Accounting Chamber of the Russian Federation dated October 7, 2011).

Average consumption of one who has entered the territory of the Russian Federation in 2011 increased by 13% (from 324 to 366 dollars.), Which is less than half the spending of Russian residents abroad. Citizens of Russia in 2011, the average spending per person of $ 792., Which is 9% higher than the average spending in 2010 ($ 724. Per person). In foreign countries the figure was 1,142 dollars. In 2011 and 1068 dollars. In 2010 (an increase of 7%), CIS 201 dollars. In 2011 and $ 203. 2010 years in (a decrease of 1%). Accordingly, the total number of traveling expenses, Russian citizens ahead of foreign residents more than doubled.

4.4 Characteristic of Tourism Development in the Russian Federation at the Micro Level on the Example of the Murmansk Region

Nowadays, there are 100 organizations tour operator and travel Agency activities in the Murmansk region (tab. 4). However, only 25 % of firms have certified to the new conditions. All travel companies are small and micro enterprises, employing about 300 persons. Increasingly, tourism is becoming of family firms and individual entrepreneurs, which is determined by the specific needs of the tourists.

Table 4. Dynamic of the main indicators of the development of the tourist industry in the Murmansk region

| Activities | 2008 y. | 2009 y. | Forecast | | The growth rate for the period, % |
			2010 y.	2011 y.	
The number of tourist firms, 58	74	79	100	100	1,72
The number of the collective placements, 111	111	113	115	137	1,23
The total number of places, 7777	7800	7880	8350	9500	1,22
The number of accommodated persons per year in collective accommodation DAC thousands 235,97	240	260,5	270,8	294,8	1,25

The financial situation of the most tourist companies is unsustainable; they do not have sufficient financial resources for the implementation of investment projects. For the period from 2002 to 2007 the volume of investments held for self-development, amounted to 325 million rubles. The problems of lack of funds for the development are illustrative of enterprises in the tourism industry and, first of all, hotels and other collective tourist accommodation. As a result, today in the Murmansk region even in the regional center there is a shortage of hotel luxury suites and deluxe rooms and, in several cities of the region they are completely absent. Many companies that provide transportation services to tourism businesses also do not have vehicles tourist class modern and/or safe. In connection with the repair of Federal roads Murmansk - St. Petersburg has received wide development of roadside infrastructure however, the level of service on some Parking lots and campsites below the maintenance requirements of tourists, which complicates the planning of tourist routes. Currently in the Russian tourism industry there has been a steady tendency to growth of prices and tariffs for services, this is especially true for the largest components of the cost of the trip: transport and hotel accommodation. On the contrary, foreign competitors prices are constantly falling, this is particularly apparent in the current crisis, from which the tourism industry has suffered in the first place. Since 2008, rates on overseas tours incomparably lower than the price of any tour in the Murmansk region. Therefore, during of recovery from the crisis, which is characterized by the reduction of solvent demand of the population for all types of paid services, it is difficult to expect growth in the foreign and domestic tourist flow in the region. The cost of tours is growing because of the actions of the state as regulator of tourism. For example, Federal law No. 12-FL, dated 05.02.2007 «On amendments to the Federal law «About bases of tourist activity in the Russian Federation» twice increased the

amount of financial security for operators, while working in the field of domestic and international tourism (5 million of rubles), increased transaction costs and due to the mandatory now conclude a firm Agreement on the implementation of the tourist product. The value of rent of the travel companies for using forest lands also dramatically reduces the performance indicators of their activities. Thus, the main factors hindering the development of tourism in the Murmansk region are:

− the small volume of investments in the maintenance and development of tourism and its infrastructure

− the lack of non-commercial information about regional tourism resources and tourism products among Russian and foreign tour operators, potential investors, potential visitors;

− weak marketing infrastructure sale of tourist products in the domestic, international and Russian markets;

− low quality and low originality of travel packages offered by travel agencies;

− large flows of amateur tourism, increasing anthropogenic load and fire threat to the natural resources of the Kola Peninsula, significant amounts of "illegal" tourism in most recreational attractive districts of the region.

5. Conclusion

Given the above we can conclude that the actual and reasonable necessity of activating the role of the government in addressing the priorities for the development of tourist and recreational complex in the Russian Federation, the creation of a competitive tourism market and improve the quality of life of Russian citizens.

Most effective and efficient way to solve the problems identified and defined tasks in the sphere of tourism is the use of program-target method and mechanisms of public-private partnership.

Thus, we can conclude about the development of tourism in Russia. When comparing 2007 with 2011, an increase of inbound and outbound tourist flow. Also increases the amount of accommodation, the foreign trade turnover of tourist services and paid services of tourism and recreation. Nevertheless, the dynamics of the key indicators of tourism Russia subject to a great influence economic threats associated with globalization of world tourism and poor internal organizational structure of the industry, resulting in a minimal increase in the incoming flow of tourists. To solve this problem it is necessary to the efficient use of the existing structure of tourist and recreational complex, as well as funding new projects to increase the flow of both domestic and inbound tourism.

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