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Barriers and Factors of Tourism Business Development in Russia and the Arctic (Based on the Results of an Expert Survey)

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Abstract. The tourism sector is the most important for the socio-economic development of countries and regions, contributing to the preservation of historical and cultural values, the formation of humanism and tolerance in the world. However, there are many difficulties in the tourism business that have become seriously exacerbated during the COVID-19 pandemic and contribute to a rethinking of the problems and factors of tourism development. In Russia, since 2020, the focus has been on the development of domestic tourism, and this further contributed to the restoration and maintenance of a certain stability in this area, which is especially important during the period of aggravation of the geopolitical situation in Russia and the world, from 2022 to the present. Nevertheless, the issues of barriers to the development of tourism in our country remain relevant, taking into account the ideas, orientations and practices of both tour operators and consumers of tourism services, which actualizes sociological research in this aspect. In order to identify the existing barriers and factors for the successful development of tourism in Russia, the authors conducted a sociological study in 2021 among tourism specialists who acted as experts and represent authorities, tourism business and science in Russian and foreign regions. The study was conducted in a qualitative strategy using the in-depth interview method, during which 31 experts were interviewed. The results of the expert survey may be useful in the further development of the tourism industry in the Russian regions.

Keywords: *tourism, tourism business, tourism barrier, tourism development factor, tourism product, quality of life*

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Introduction

The tourism industry is the most important in improving the quality of life of the population, since it affects all significant areas of peoples' lives related to both their daily, work, cultural and leisure activities. Being a key element of the regional economy, tourism contributes not only to the development of the social infrastructure of settlements, but also to a deeper knowledge of the culture, history of the territories, and the formation of tolerance in relations between people.

The Strategy for the development of tourism in the Russian Federation for the period up to 2035, adopted in 2019, recognized the need to accelerate growth rates and strengthen the role of

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tourism in economic development, since in recent years the industry has formed about 4% of the country's gross domestic product ¹.

Tourism plays a special role in the Arctic, contributing to the effective development of territories and improving the quality of life of the population living there. Considering the high resource intensity of economic activity, the lag in the quality of life from the Russian average, the low competitiveness in the business sector in the Arctic territories noted in the Development strategy of the Arctic zone of the Russian Federation, the development of tourism in the Arctic will, without a doubt, contribute to the improvement of these indicators, as well as the formation of a comfortable, well-equipped environment and socio-economic development of the Arctic territories as a whole, which is also indicated in this document as goals for the period until 2035 ².

There are many challenges to tourism development in Russia and the Arctic. The measures taken by Russia in the pre-pandemic years to stimulate the development of inbound and domestic tourism led to an improvement in a range of indicators related to the growth of tourists' number in our country and an increase in Russia's place in the ranking of countries in terms of competitiveness in the travel industry. However, a significant problem remained the suboptimal price-quality ratio for a number of types of tourism, high transport costs, lack of hotel rooms, unrecognizability of Russian tourism brands and other difficulties that hampered its development.

During the COVID-19 pandemic, the need to develop domestic tourism has become especially acute and, under these conditions, has become global [1, Ulak N.]. In 2020–2021, prospects for the development of tourism in the Russian Federation, according to analysts ³, had a high level of uncertainty, especially in the global tourism market [2, Sahakyan M., Antamoshkina E.; 3, Ivanov I.A., Golomidova E.S., Terenina N.K.]. However, now it can be argued that the pandemic has made it possible to focus on the domestic tourism, declared in the Tourism development strategy as one of the main courses for the development of the tourism sector in our country, which is especially important in the modern period in the current geopolitical situation.

It should be noted that in 2021 and 2022, there was a positive trend in domestic organized tourism compared to 2019 and 2020, according to the Association of tour operators of Russia ⁴. The situation is different with inbound tourism, where there has been a significant decline in indi-

¹ Strategiya razvitiya turizma v Rossiyskoy Federatsii na period do 2035 goda, utverzhdena Rasporyazheniem Pravitel'stva RF ot 20 sentyabrya 2019 g. № 2129-r. S. 22 [The strategy for the development of tourism in the Russian Federation for the period until 2035 was approved by Order of the Government of the Russian Federation of September 20, 2019 No. 2129-r. P. 22]. URL: <http://government.ru/docs/37906/> (accessed 30 January 2023).

² Ukaz Prezidenta RF ot 26 oktyabrya 2020 g. № 645 «O Strategii razvitiya Arkticheskoy zony Rossiyskoy Federatsii i obespecheniya natsional'noy bezopasnosti na period do 2035 goda» [Decree of the President of the Russian Federation of October 26, 2020 No. 645 "Strategy for Developing the Russian Arctic Zone and Ensuring National Security until 2035"]. URL: <https://www.garant.ru/products/ipo/prime/doc/74710556/> (accessed 30 January 2023).

³ Misikhina S. Rossiyskiy turizm: dostizheniya, problemy, mery podderzhki pri pandemii koronavirusa [Russian tourism: achievements, problems, support measures during the coronavirus pandemic]. Moscow, National Research University Higher School of Economics, 2020. URL: <https://goo.su/Cpkb> (accessed 20 March 2023).

⁴ V ATOR podveli turistichekoe itogi 2021 goda [ATOR summed up the tourism results for 2021]. URL: <https://www.atorus.ru/news/press-centre/new/58171.html> (accessed 28 January 2023); ATOR podvela predvaritel'nye itogi turistichekogo 2022 goda [ATOR summed up the preliminary results of the tourism year 2022]. URL: <https://www.atorus.ru/node/50839> (accessed 28 January 2023).

cators since 2020. Thus, according to Rostourism estimates, economic losses from the decline in tourism amounted to more than 1.5 trillion rubles in 2020⁵. According to the results of three quarters of 2022, the inbound tourist flow to Russia of foreign citizens decreased by 99.5% compared to 2019 and by 16% compared to 2021⁶.

Experts believe that the tourism industry in Russia has long been in need of change, and the crisis situation that emerged as a result of the coronavirus pandemic and the tense geopolitical conditions in the world should generally contribute to the already emerging transformation [4, Loguntsova I.V.].

In modern conditions, the tourism sector in Russia continues to experience a difficult period, caused by a sharp decline in incoming tourism and an urgent need for the further comprehensive development of tourist destinations within the country. In this regard, research to identify barriers and factors for the further successful functioning of the tourism industry is of particular importance, which was undertaken in the framework of this study. The results obtained will be useful in carrying out targeted work to eliminate existing difficulties and develop this area in Russian regions, including the Arctic territories.

Literature review

The scientific literature has approved the interdisciplinary status of the tourism phenomenon, which, being a socio-economic phenomenon, is revealed through a variety of approaches: economic-managerial, regulatory, legal, recreational, geographical, cultural, systemic and others [5, Varlamova A.V., p. 136]. In the modern world, tourism has become a significant industry, but scientists note that its theory and methodology are still in the process of formation [6, Sharma R., p. 90].

Researchers in the field of sociology of tourism consider tourism as a journey for consumption and leisure [7, Cohen E., Cohen S.; 8, McCannell D.]. The phenomenon of mass tourism receives a critical assessment in early sociological theories, because it is associated with artificial, unreal authenticity, based on consumerism and hedonism of visitors and exploitation of the culture of local residents. In this regard, E. Cohen talks about the commodification of local culture, i.e. its transformation into a commodity for tourist consumption [9, p. 372]. This can lead to cultural forgeries created specifically for external consumers [10, Belkina S.V.], as a result of which the original meaning is lost and the authenticity of cultural artifacts is destroyed, and the culture, having become the object of display, is expropriated from local residents [11, Pine J., Gilmore J.].

⁵ Glava Rosturizma rasskazala ob ubytkakh iz-za otsutstviya inostrannykh turistov [The head of the Federal Tourism Agency spoke about losses due to the lack of foreign tourists]. URL: <https://tass.ru/ekonomika/9116567> (accessed 30 March 2023).

⁶ ATOR podvela predvaritel'nye itogi turisticheskogo 2022 goda [ATOR summed up the preliminary results of the tourism year 2022]. URL: <https://www.atorus.ru/node/50839> (accessed 28 January 2023).

At the present stage, discussions continue regarding the problem of authenticity and the need of tourists for the authenticity of cultural artifacts, which is especially important in the context of globalization and active development of the impression economy.

At the same time, in the context of postmodern society, ideas about authenticity are subject to transformation: if the experience gained by a tourist corresponds to his motives and expectations, then it can be called authentic [12, Moshnyaga E., p. 110]. As a result, truly new impressions replace and fade into the background the authenticity of the cultural objects themselves. Thus, cultural tourism as a special type of tourist practice is transformed into experience tourism [13, Karpova G.A., Khoreva L.V.; 14, Sushchinskaya M.D.], which involves the direct participation of the tourist in the life of the visited object, involvement in practices atypical for visitors.

The processes of transformation of the tourist himself and the motivation of his trips are conceptually comprehended through the use of the category of status liminality, which is understood as the uncertain status position of an individual or community during territorial movement, characterized by temporality, status-role mobility from the view of social identity, involvement in the value-normative dimension and reflexivity [15, Katernyy I.V., p. 228]. In the process of gaining a tourist experience, a person temporarily abandons his usual status, usual way of life and identity, but after the trip he returns to his usual state. The tourist experience is associated with an exit from the sphere of everyday life into an extra-structural reality, where connections between people are filled with vivid affects, and the experience gained penetrates to the depths of the personality [15, Katernyy I.V., p. 232].

In the conditions of a postmodern society, tourism is transformed into post-tourism [16, Moshnyaga E.V.], where the organization of travel turns into a game of making a profit from the provision of comfortable and safe services. The post-tourist is no longer looking for novelty and authenticity and most likely will not question them, but is more focused on receiving pleasure in a hyperreality specially created for him [15, Katernyy I.V., pp. 233–234].

J. Urry, in his mobile theory, takes tourism from the sphere of leisure to the sphere of consumption, and the latter represents the basis of contemporary postmodern society — the consumer society. Having identified two types of consumption — Fordist (mass) and post-Fordist (individualized), the scientist classifies modern tourism as the second type, where, in addition to the emphasis on separation from the “mass” of other consumers, the so-called image, visual consumption (consumption of ready-made images attractive to photography) is of great importance [17, Urry J.].

Thus, the conceptual distinction between the phenomena of tourism and travel is carried out in sociological discourse through the definition of tourism as a modern leisure and consumer practice, which is provided and supported by a whole range of tourism services designed to satisfy the diversified (individualized) needs of visitors for pleasure and experience.

One of the most important problems in the development of tourism in modern society, characterized by high dynamism, uncertainty and unpredictability, is the crisis of confidence. In addition to the risk of receiving a fake experience and encountering artificial authenticity, the entire range of tourism services is in question. Tourism, like any service, is characterized by intangibility and the absence of clear, calculable quality criteria. At the same time, a wide range of interactions at each stage of the journey, which includes a large number of subjects, each of which should guarantee the safety of the tourist, is specific to tourism [18, Barashok I.V., Rudenko L.L., p. 78]. The presence of a large number of intermediaries and accompanying agents for the implementation of complex tourism services makes it difficult to establish trust between the seller and the buyer. The gamification of the authenticity of the tourist experience can turn into a simulation of the quality of the services provided to the tourist as a whole. The need to develop rules and standards for the provision of this service leads to an understanding of the phenomenon of tourism as a special social institution, which is fully realized within the framework of a sociological approach to analyzing the functioning of the tourism sector [19, Appakova-Shogina N.Z., Gut A.V., Zinurova R.I.; 20, Kushchev N.P.].

Representing tourism as a social institution, researchers focus on the issues of its structure, the definition of the main parties involved in tourism, their needs and resources to meet these needs; the peculiarities of functioning of both individual structural elements and in interrelation with each other; the analysis of the value-normative system that regulates the functioning and interaction of structural elements of tourism, etc. is carried out. Issues of transformation of this social institution under the influence of modern challenges, including the COVID-19 pandemic, are addressed. For example, as a result of digitalization processes, which have significantly changed consumer behavior patterns, the emergence of a new direction in tourism— smart tourism — is noted [21, Ovcharenko L.A., Lebezova E.M.]. The peculiarity of “smart” tourists is their implementation of innovative consumer patterns based on digital communication channels.

Modern theoretical and applied sociological studies of tourism as a social institution reveal the features of certain types of tourism, identified on various grounds (youth, social, cultural, event, industrial, international, domestic, etc.) [22, Kononov A.Yu.; 23, Trubilin A.G.; 24, Lysikova O.V.]. A sociological analysis of the main trends and factors of tourism development at the level of individual territories is being actively carried out; problems of tourism potential and attractiveness of Russian regions are revealed [25, Frolova E.V., Kabanova E.E.; 26, Boldyreva S.B.; 27, Zotkin D.V., Akaev D.V.]. Particular attention is paid to the specifics of tourism activities in the northern (including Arctic) territories, both in Russian society and at the level of other countries [28, Lukin Yu.F.; 29, Zhigunova G.V.; 30, Karhu Y., Osipov A.Yu.].

A comprehensive analysis of the situation in the tourism sector at the level of the entire Russian society deserves special attention. At the same time, a quantitative (mainly economic) approach to the problem is quite widely presented in the scientific literature [31, Valkova

T.M., Kruzhalin V.I., Kruzhalin K.V., Shabalina N.V.; 32, Sharikov V.I.; 33, Abramova T.]. In this regard, the need for a qualitative analysis of the current situation in tourism at the present stage of development of Russian society has been updated. One of the most important sources of information that allows giving a qualitative assessment of the problems and prospects for the development of tourism in Russia are representatives of business, science and government, who are carriers of expert knowledge.

Materials and methods

In order to identify factors that hinder and promote the development of tourism in Russian regions, in 2021, the authors, as part of a research team led by E.N. Sharova, conducted a study among Russian and foreign experts in this field. During the survey, the method of in-depth interviews was used, followed by a qualitative analysis of the data obtained. The number of respondents was 31 people from different areas of the tourism industry in Vologda, Moscow, Murmansk and the Murmansk Oblast (Apatity, Kirovsk, Nickel), St. Petersburg, Tver, as well as Norway (Oslo, Spitsbergen). By area of activity, the experts represented: authorities (10 people); science and education (5 people); business sector (16 people, of which 7 people are hotel services, recreation and entertainment centers, 6 people are tour operators; 3 people are catering) (the distribution of number designations and areas of activity of experts are given in parentheses in the text).

Research results

Based on the results of the expert survey, the main difficulties in the development of the tourism industry in Russia and the Arctic territories (using the example of the Murmansk Oblast) at the institutional level were identified.

Experts identified **the instability of the tourism industry and, accordingly, business in this area as a fundamental problem at the institutional level**. The dependence of the sector on the state of the economy, on seasonality, on the political and social situation in the world and the country was noted. The vulnerability of the entire sector has been particularly acutely demonstrated by the coronavirus pandemic:

During the pandemic, we didn't work for six months, but we paid taxes (8, hotel service, Murmansk);

We really had a very difficult period. ... Until the last moment we tried to remain standing. This is lost profit, which amounts to hundreds of thousands of rubles. We just sorted out the debts and credit obligations. Plus, we purchased equipment on lease and we had to make monthly payments on it. We had nothing to pay... We were left with loans, with debts, and all summer we tried to survive this difficult period (8, hotel service, Murmansk).

During the period of self-isolation and pandemic restrictions, hotels and other accommodation facilities, exhibition centers and cultural leisure facilities suffered the most. The only

less vulnerable areas in tourism are catering, which works with food delivery, and extreme tourism:

... extreme sports enthusiasts don't care whether there is a pandemic or not. They are ready to overcome these obstacles from regulations, prohibitions, and otherwise get to the place where the service is provided. But the mass tourists, those with children, they are, of course, afraid to go; those who are elderly or have health problems, of course, will not go (9, hotel service, Murmansk).

But still, experts note that in 2021 the situation began to change for the better:

...now there is a reverse reaction. ... People are not able to travel abroad and they now have money to spend in Russia. As a result, the service has improved (8, hotel service, Murmansk).

Despite the financial and organizational difficulties during the pandemic period, experts note that a “reboot” occurred during the pandemic; there was an understanding that it was necessary to develop domestic tourism, fill it with a meaningful component, and the level of trust in tour operators increased.

The next significant problem was **the low level of professionalism of tourism industry personnel**.

Professionalism is determined by the level of competence, experience, knowledge, including the characteristics of life in the region, its history; the desire to convey interesting, accurate and truthful information (for guides, tour guides); constant training and development together with the region; as well as a responsible attitude to business and the level of involvement in the provision of tourism services:

You need to constantly keep your “ear to the ground”, especially if it is a private business... It is necessary to monitor tourists along the entire route — track their path and help with problems. The tour operator does not abandon the person all the way home (5, tour operator, Murmansk).

The lack of professional knowledge does not allow tour business entities to understand how tourism is organized in the world and to be guided by trends and norms of the world market development, which, in turn, does not allow improving the quality of services in this sphere.

One of the reasons for this, according to experts, is the low quality of personnel training in the country and, as a consequence, the lack of professional knowledge. At the same time, experts note a steady trend of decline in the quality of educational training observed over the past few decades:

At some point, the situation began to improve, in the 2000s, as it seemed to me, but no... nothing changed in the 2000s. On the contrary, the level of training of specialists has become worse; graduates do not understand anything (6, tour operator, Spitsbergen).

Another reason for the low level of professionalism of tourism industry personnel is due to the ease of entry into the profession, which does not require any special education and even licensing of activities. Here are the statements of informants on this matter:

You can enter the tourism industry at low cost, that is, to start a business, you don't need a lot of investments, it's enough to have a personal car, you can even do without it (4, science, Murmansk);

If there is an opportunity to make money somehow — they make money. If you have a car, take people to Teriberka. Nobody asks a guide for a license... — this is a wild business here (17, hotel service, Murmansk).

Due to the lack of license checks and quality control of services on excursion routes, many “uneducated self-employed” appear in the tourism sector, driven by the desire to make a quick profit. Experts have repeatedly given examples of how such “specialists” distorted the facts and history of the region, which negatively affected the regional image.

A similar situation is observed in the Lovozerskiy district of the Murmansk Oblast, where Sami villages, created as a tourism project, are presented as amusement parks that have nothing in common with the true culture of the Sami. The ongoing “Disneyfication” causes negative emotions and disappointment among both experts and guests seeking local authenticity.

Experts noted that in our country, **a serious problem in the tourism industry is the lack of development of the regulatory framework**. This problem, according to experts, is directly related to the long-term absence of a systematic state policy in the field of tourism, the inconsistency of regulatory documents with international standards, as well as the competence of local officials. As a result, security issues suffer and “grey” business develops.

Experts note that at the present stage in Russia, an effective mechanism for ensuring the safety of tourists has not yet been created. Due to the lack of mechanisms for monitoring and checking compliance with security measures in tourism, and the lack of legitimate training courses in the field of security in tourism, this aspect is often ignored by tourism business entities.

In addition to security issues, experts point to the need to solve existing problems at the legislative level, especially relevant in the Arctic regions, in particular in the Murmansk Oblast, for the implementation of fishing, crab fishing, water, geological, industrial, mountain and other types of tourism; resolving issues with obtaining permits to enter closed territorial entities for tourism purposes, renting snowmobiles (driving rules and insurance apply only to public roads, while snowmobiles are used on off-road routes), etc.

Almost all experts talk about **insufficient support for the tourism business by the state and regional authorities**, which became acutely evident during the COVID-19 pandemic. Businessmen were faced with the need for financial support for their business, the need to defer monthly payments, tax payments, but they either did not receive assistance from the state or received insignificant help:

We sold everything we could in the family to save the office. Nobody helped us with anything, not even a ruble. They gave us loans, we took 5-6 million, now in six months we have to pay them back. ... Now we are taking the next loan to close this one... (7, tour operator, Murmansk).

Another aspect of insufficient support from the authorities, which experts paid attention to, is **the lack of consulting support for tourism businesses in the process of applying for funding under government programs:**

The state has various funds for the development of tourism.... But... they (companies — author) cannot take it.... Specialists, economists who work in our departments, all with good diplomas, but there is no practice, no experience, no desire... That is, there is money, but they can't take it (7, tour operator, Murmansk).

The downside of the presented problem is the ineffective use of state support resources, which was noted by experts representing government authorities. This problem is expressed in the lack of competence of representatives of the tourism business to correctly fill out applications, draw up a business plan, and come up with a new original product. Perhaps the organization of consulting support for business, the need for which was mentioned by businessmen, can solve this problem.

Experts noted **the need for a constructive attitude of the state towards small business.** *Since many tourism practices are implemented through small businesses, it is important to prevent its development "underground" or "in the grey zone"* (6, tour operator, Spitsbergen). Experts also talk about the state's understanding of the specifics of tourism and the corresponding attitude:

Previously it was said that tourism should bring a lot of income and pay taxes. But there will be no tourism tax, because everyone is trying to save money, not to pay something to the general budget. The effect of tourism is different: the more tourists come, they bring money, they spend money in restaurants, shops, on transport, visiting parks, in hotels. This money remains in the region (7, tour operator, Murmansk).

The next important barrier to tourism development is **the logistical difficulties and the underdevelopment of transport infrastructure.**

The underdevelopment of transport infrastructure includes, according to experts, poor-quality roads or their absence within regions; lack of public transport routes to tourist locations, long and uncomfortable trips on public buses, which leads to a search for ways to move around the region, dependence on private drivers, high cost of travel on all types of transport; absence or ill-conceived nature of organized pickups of tourists from airports to certain locations; non-compliance of airports and railway stations in many Russian cities with standards for receiving a larger flow of tourists; lack or insufficiency of equipped public transport for organized transportation of children and people with disabilities in accordance with existing requirements.

The next barrier is **the underdevelopment of tourism infrastructure**. It includes the lack or complete absence of hotels, cafes, public toilets both on routes and in locations, and much more. A striking example is Teriberka, Murmansk Oblast, where for a long time the massive flow of tourists was not provided with the services necessary for travelers, both in the location itself and along the route to it. In this regard, there is a huge need to establish the following along routes and locations: public toilets, including in natural tourism sites; places for stopping and parking of vehicles at places of travel in the region, observation platforms; cafes along the routes; souvenir shops and stores; gas stations; places to rest and spend the night:

... interchanges are needed, "pockets" are needed so that tourist buses can stop and maneuver at certain locations of objects (30, authorities, Murmansk);

When you are travelling, you should have good transport, a good road, you want to go to the toilet — and here is a sanitary stop — this can be either a petrol station or some toilets in these "Georgian houses". This includes roadside infrastructure: some cafes where you can have a snack, or shops where you can buy something, and places of accommodation such as campsites, hostels, hotels, etc. But in order for all this to appear, it has to be worked with. And, accordingly, those structures that are responsible for the tourism sector in the region work, or... a city-forming company that aims to develop a particular area and support the population (13, tour operator, Moscow).

As for accommodation, regional locations often lack the opportunity to accommodate even small flows of tourists:

Teriberka is actively growing in terms of flow. Tourists are coming: Chinese, Thai. If they arrive by plane, they should travel in this group. And we don't even have anywhere to house them here. That's why only Murmansk. They come to Murmansk, settle down and make radial trips. They left in the morning, drove to Teriberka and came back. The next morning they left, drove to the "Snow Village" and somewhere else and came back. We need them to come, live here, leave money here... (9, hotel service, Apatity, Murmansk Oblast).

Experts note the lack of places to accommodate tourists, the old rooms, the lack of basic services (breakfast) in hotels, and the high cost, as, for example, in the city of Apatity, Murmansk Oblast:

We do not have modern hotels. I don't know any. They are all from the 1990s, 1980s, 1970s. The Severnaya Hotel, of course, maintains itself in decent condition and even receives stars, and even does renovations, but our tourists cannot afford it (9, hotel service, Apatity, Murmansk Oblast).

In order to open new hotels, mini-hotels or hostels, there are a large number of difficulties both financial and normative:

Now it is impossible to open a hotel or hostel. Let's look at the requirements for these rooms: the ceiling height must be no lower than the value, the distance from the ceiling to the bed, etc. Where to find such premises? They simply do not exist. You can't do it in the base-

ment, the ground floor — you need permission from almost the entire house to open anything there. All houses in Murmansk were built decades ago ... they do not comply with any GOSTs or standards. And if you build it, there is no sewage system, no electricity, all this needs to be supplied. What money is needed! To take a loan for an entrepreneur, you need collateral. That is, there is no easy, cheap money. But how to start a business if it gives a profitability of only 10–12%, and the loan rate is 18–25%... There is an idea, there is a desire, but there is no money. ... What kind of development can we talk about (17, hotel business, Murmansk).

An important barrier to organizing a successful trip is **the insufficient coverage of locations with telephone and Internet connections, lack of Wi-Fi**, which are necessary both in terms of notification in case of danger and for prompt exchange of tourists' impressions in social networks and messengers. For tourism as an industry of impressions, communication and the Internet become a channel for promoting the area and tourist products. At the same time, it is important to give tourists the opportunity to share their emotions in the moment:

What is the impression industry: ... received an impression, took a photo and immediately posted it on social networks. ... And friends say: "I want to go there too" ... If she takes this photo, but she doesn't have the Internet, then it's not a fact that she will post it in the evening. At best, she will show it when she comes back. But... there will be no such emotions (9, hotel service, Apatity, Murmansk Oblast).

Experts also note **a lack of information in logistics and content plans in the regions**, which creates a sense of uncertainty, risk and fear among tourists. In this regard, experts emphasize the importance of developing a tourist's understanding of what types of transport he can get to the place, where to spend the night, where and what to eat, where to go and what to see. At the same time, information is needed on different tourist destinations for groups of different ages and social status:

For example, I want to understand whether I want to go to the Murmansk Oblast. How can I make the best route, ... how to get there, what to see.... That is, I need some kind of ... navigator, a hint. ... Or the Teriberka — everyone knows it. How to get there? What will you do there? Where will you be there? Where will you go? Yes, the place is interesting, but wouldn't it turn out that you drive five hours one way, see it for two hours, and then drive back for five hours? (28, authorities, Tver).

According to experts, any region should have a branded route that is not only interesting for the traveler, but also carefully thought out, accessible all year round and has a low cost. A successful route is determined by the demand among tourists; it should be easily travelled by at least 50 people per weekend (20, authorities, Oslo, Norway).

Another problem is **the lack of branding of territories taking into account their holistic image**. This problem, in turn, contributes to the lack of unity among tour operators in positioning the region. As a result, the tourist does not develop a clear image of the territory and does

not form a desire to come again to immerse himself in the depths of the culture and life of the local community.

At the socio-group and personal levels, experts noted **the low substantive level of tourism products and their inability to give a rich experience to tourists as problems**, observed in all Russian territories:

Neither territories nor cities have been able to create a tourism product that will contain a large number of impressions (11, authorities, Moscow).

When there is no focus on content in a region, and the product itself is of the same type and is not aimed at a specific audience, then it is not interesting for more than one visit. At the same time, the Chinese, as experts note, are ready to pay for nature, which is observed annually in their trips to the territory of the Murmansk Oblast just for the northern lights (“they are ready to pay for nothing” (20, authorities, Oslo, Norway)). But on the domestic market, Russian tourists need content:

Russian tourists don't understand why they should pay money just to look at nature... Russians are more practical, they want to pay for content... (20, authorities, Oslo, Norway).

In order to interest Russian tourism, this informant recommends constantly identifying what people are willing to pay money for.

To get away from the uniformity of tourism products within any region, experts suggest that each municipality should find its own specifics, identify “anchors”, insignia (14, authorities, Murmansk Oblast); fill tours with activities in accordance with local culture and practices — weaving baubles in Pomor style, making jam... (2, science and education, Murmansk).

Moreover, it is important **to match tour products with modern trends and ways of their presentation**. For example, nowadays, according to the respondents, interactivity is important, especially in gastronomy, local history.

This is also **the lack of focus of tour operators on a specific consumer, the correct packaging of tourism products** in accordance with the requests of tourists and their internal needs:

For example, it is a very big disappointment when a romantic couple, a family with screaming children and some grandparents — historians — find themselves in the same group on a trip. These three categories have very different travel motivations. And they are trying to “shove” them into the same product. And the global trend we see is to take this internal motivation into account and... “tailor travel” to the individual needs and motivation of consumers. This is related to the psychology of consumption (20, authorities, Oslo, Norway).

All experts note **the low quality of service in tourism, without which success in the tourism business is impossible**. The main reason is the lack of qualified personnel with specialized education, a large number of unofficial “businessmen” and random people involved in the provision of tourism services. In addition, this is the lack of motivated personnel, low wages, especially in the service sector and, accordingly, low requirements for personnel, as well as bad habits:

Nowadays staffing is a problem. The most important thing is to find both an administrator and a waiter. And not management, but precisely the lowest level (28, authorities, Tver).

Experts note that this problem is characteristic of the country as a whole, and is largely due to the lack of prestige of the service sector (*people do not want to work in this area. It is not prestigious... (28, authorities, Tver)*).

The solution to this problem, according to experts, lies in increasing the prestige of the service sector at the institutional level. This requires *“three, four or five successful cases, so that people see that this can be done, that it is not a shame, that it brings income” (28, authorities, Tver).*

Experts note that the Russian tourist is a demanding consumer, as he is an experienced traveler to different countries and is focused on a high level of service. It was noted that high-quality service consists of successful answers to the following questions: *“Where will the tourist live? Where will the tourist eat? What will the tourist do? (4, education and science, Murmansk).* The consequence of a low level of service or its complete absence is a reluctance to come to the region again (*“Looked at something and left”*).

The next barrier is **the low involvement of the local population in tourism development.**

Experts note that residents have not yet realized that this is one of the branches of development, generating income, cultivating respect and love for the region (26, public catering, Kirovsk).

According to experts, there is practically no work with the local population in the regions, as a result of which *“the population does not want tourists” (7, tour operator, Murmansk),* tense situations and conflicts arise due to violation of order, garbage collection in places of visit, different expectations both:

Last summer, there was a big conflict with the local population (in Teriberka — author). Why? Because, unfortunately, there are tourists — normal people who take away everything they brought with them. And there are those who, even if they pack the garbage in bags, leave these bags in the place where they arrived, hoping that someone will clean it all up after them. That is, on the one hand, it turns out that the “newcomers” have brought some money to some small sector of the economy, Teriberka, but the settlement itself cannot invest in rubbish disposal. It has no money for such volumes (19, tour operator, Murmansk);

In my opinion, generally speaking... no one works with the population. No one at all. Neither in Apatity nor in Kirovsk the population wants the tourist. Well, except for those who rent their apartments... And every year I hear the same thing: “They’ve come in large numbers. It’s impossible to buy food”. That is, neither the stores nor the city administration are ready. Every time they fail the season at some point (9, hotel service, Murmansk).

Work with the population should include, according to informants, both explanations about the positive effect of tourism for the development of regions, especially subsidized ones (*“they just don’t understand that it’s money. They don’t understand that we... are subsidized” (9, hotel service, Murmansk)*), as well as support for local initiatives and businesses.

In the last question, informants note the inertness of residents and the tendency to rely on visitors, the expectation that *“some businessmen from St. Petersburg or Moscow will come to us and implement their ideas”* (15, science and education, Nickel, Murmansk Oblast). The informants themselves consider the participation of the local population in tourism to be an extremely positive thing, especially in small locations, since they are the bearer of local identity:

In small territories, tourism is carried out by those who love their territory, this is an opportunity to tell a story, self-identification... (28, authorities, Tver).

In this case, according to experts, tourism will also contribute to the reduction of outflow from remote territories.

The involvement of the local population in the tourism sector is also manifested through the interesting life of the local community, full of exciting events, *“where there is something to show and to be proud of”*:

Success in the development of tourism is when we stop selling “pictures”, and start living in such a way that we have something to show and to be proud of. After all, tourism is, first of all, getting to know the life of people in the place where you come (26, public catering, Kirovsk).

Another aspect of non-involvement manifests itself in the inaccessibility of local products and services for local residents, which form a regional identity and are a key component of any travel. For example, in the Murmansk Oblast, this is observed in expensive Arctic cuisine. Due to the inaccessibility of expensive Arctic products, locals are not aware of their region and cannot promote it (29, public catering, Moscow). Therefore, the promotion of regional cuisine and local crafts among the local population is important.

Among the mental aspects of tourist services consumption, experts noted **the generally low culture of recreation and travel in the country**, which is expressed in the dominant demand for beach holidays and excursions, while a variety of destinations are being actively developed: adventure, ecological, geological, ethnographic, winter and other, allowing interesting and informative time for holidaymakers in any region of Russia, including the Arctic. According to experts, the majority of Russians today do not take advantage of the available opportunities, following traditional ideas about tourist trips.

The problem of **reasonable management of Arctic destinations**, which is the most important condition for the development of tourism in the Arctic, deserves special attention. *“Reasonable management”* includes the need to take into account weather conditions, respect for the Arctic nature and human safety:

This is a different nature, different natural conditions. Although any nature needs to be protected, this is more noticeable in the Arctic. You can't drive vehicles wherever you want. ... You need to understand that it takes 15 years for lichen to grow 3 cm. Here you need to think about a responsible approach to marketing, about a responsible approach to product development. For example, when we choose photographs for social media, we understand that we cannot show a person balancing on the edge of a cliff. If we show this on the official website, and then someone falls,

then we are the ones who are showing such an example. Or if you show how someone drove somewhere on a snowmobile, you always need to think whether another 50 thousand people can repeat this without damage to nature, without damage to the population. This responsible approach to the Arctic is very important... There is no need to constantly post people in bikinis, but you need to dress properly so that there is no... freezer burn, and generally think that if the guests were cold, they will remember nothing but the cold. And they won't want to buy anything else, they'll want to go to a warm room. I know that the university in Tromsø is working on this specifically, and we need to pay special attention to this in connection with the climate in the Arctic. ... You need to plan 2-3 route options.... When you know all this with reference to the region, it is easier to make some products. You can't just copy what they do in Australia and other regions. You need to know the region and think about what you are doing (20, authorities, Oslo, Norway).

Thus, in the conditions of modern Russian society, the development of tourism is significantly complicated. Obstacles to this are due to the insufficient development of the legal framework, lack of professional personnel, provision of low-quality services and unsatisfactory service, as well as the inability to create meaningful and diverse tourism products and the low culture of recreation and travel of Russians in general.

The elimination of these barriers is a significant step in the socio-economic development of regions at the expense of the tourism sector.

Based on the interviews and analysis of existing difficulties in the tourism sector, the following success factors in tourism can be identified:

- current legislation; mutual understanding between executive authorities and the tourism industry;
- availability of developed infrastructure in the region in general and on tourist routes in particular;
- high-quality service, well-thought-out services;
- thoughtfulness of logistics routes, which includes all-season availability, navigation tips for travelers, reasonable price, provision of convenience and comfort along the route to the location;
- content, attractiveness, diversity and uniqueness of tourism products; territorial and regional distinctiveness of objects; compliance of tourist products with modern trends;
- taking into account the specifics of different target groups of tourists, their needs and motivations, the ability to create travelling based on the psychology of consumption;
- interesting life of the local population (activities, events);
- information sufficiency about the tourism product; advertising;
- professionalism of managers, guides, tour operators;
- involvement of the local population in tourism and understanding of its importance for the region, development of local initiatives.

In addition to the above, it is extremely important, according to experts, to understand the economic component of tourism:

The most important thing is not to mix tourism with culture. Everything is often reduced to “an accordion”. This is not “an accordion”, it’s still an economy... Tourism needs to be formed as a product. I urge everyone to think of tourism as a branch of the economy. Now you have formed a product, you understand that the market needs this product and what is hindering this product: infrastructure, personnel, money, subsidies. If you don't have this, then any money will be wasted. You will build hotels where they are not needed, repair roads where no one will go, because there is nothing to see there. So it's an economy and it's a focus. You can't do everything at once. ... I would choose five points. And then hit them (28, authorities, Tver).

Using the example of the city of Kirovsk, Murmansk Oblast, the expert further explains:

For example, we have a flow to Kirovsk. It's already there, it's easier to work with it. It is easier to persuade a person who went to Kirovsk to spend a day more in the Murmansk Oblast to go, for example, on an excursion somewhere, than to persuade a person who is in St. Petersburg or Moscow to go to the Murmansk Oblast. You need to work with tourists at a point that is already attractive. That is, you need to expand further from these points. Kirovsk has a unique advantage — it snows until May. Few places have this. This is a very big advantage. It is necessary to expand this segment and offer additional entertainment services to people who come to ski. So that they come not for four days, but for seven. They would ski and then do something else (28, authorities, Tver).

The experience of other regions that are successfully developing in certain directions is also useful:

It's clear that Yaroslavl and Vladimir have been in demand since the Soviet period. I'm talking about more or less new places. For example, the village of Mandrogi, Leningrad Oblast, which became a village for servicing cruise ships. I think there are already several hundred cruise ships visiting there. Mandrogi found a market, found understanding, and created a complex product. It is a whole village where you can take a walk and do crafts. ... Although it's not an obvious place for tourism, for a one-time visit. Secondly, I'm not considering the most touristy regions like Kaluga with their theme about astronautics. ... The third thing, I still have to say, is what they did at Krasnaya Polyana. It's clear that the ski slopes are where the money is huge, but there are also a lot of inexpensive package tours (28, authorities, Tver).

Summarizing the success factors, we can say that, first of all, it is a combination of professional personnel, infrastructure and tourism products, implemented with the support of the authorities and the local population, and success itself is determined by a significant tourist flow throughout the year.

Discussion and conclusion

The identified barriers and success factors in the development of tourism business show the importance of interaction with authorities and the local population; increasing the availability and quality of services provided, the necessity to take into account the needs of consumers of tourism products and modern trends, the importance of interaction with the local population and their involvement in the tourism industry.

If we talk about the problems of tourism development in Russia in general and in the Arctic in particular, the most serious difficulties, according to experts, are at the level of organizing the tourism business, the lack of “reasonable” laws and regulations, insufficient state support and quality training of industry specialists. And only then, in terms of importance, are the problems of content of tourist products, development and functioning of tourist infrastructure and services in the course of tourist services realization.

The tasks of providing tourists with access to locations through affordable transport, infrastructure and well-designed routes, content of services and quality service will contribute to return tourism and increase income in the tourism business, as well as the development of related industries, improving the comfort and quality of life of local residents in the Arctic territories and in Russia as a whole.

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