

NORTHERN AND ARCTIC SOCIETIES

Arctic and North. 2022. No. 47. Pp. 136–156.

Original article

UDC 338.48(470.1/.2)(045)

doi: 10.37482/issn2221-2698.2022.47.164

Tourism Development in the Regions of the European North ^{1*}

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Abstract. The European North of the Russian Federation is a unique northern (Arctic) tourist destination with ecologically vulnerable system, original traditions and culture of the locals, attracting Russian and international tourists. The aim of the work is to form a comprehensive view of the development of tourism in the European North of the Russian Federation based on identifying general trends and specifics of its development in the regional context. The model platform is six constituent regions of the European North of the Russian Federation (the Republics of Karelia and Komi, Arkhangelsk, Vologda and Murmansk oblasts, as well as the Nenets Autonomous Okrug). The research is based on investigation of seven main blocks: tourist and recreational potential and its promotion in the Internet; development of tourist infrastructure; strategies of the tourism development; dynamics of tourist flows (domestic and organized international); economic factor in the development of domestic tourism; regions in the National Tourism Rating; factors hindering tourism development. The impact of the COVID-19 pandemic on the development of tourism in the European North is presented. The study is based on open statistical data from Rosstat, the official website of the National Tourism Rating for the period 2016–2020. The median indicators are calculated in the work. The results of the study allow us to form a general idea of the development of tourism in the Russian regions of the European North. The specific characteristics and general trends of the regional development of tourism in the regions are revealed.

Keywords: *European North, region, tourism development, tourist destination, Russian Federation*

Introduction

The European North of the Russian Federation is a unique northern (Arctic) tourist destination with fragile ecological systems, original traditions and culture of the local population, attracting the attention of visitors from all over the world. Increasing interest in the tourism and recreational opportunities of the northern (Arctic) territories materializes in an increasing number of scientific studies by both Russian and foreign scientists devoted to the problems of tourism development, its regional specifics, limitations and prospects for the functioning of this sphere of economic activity. The aim of the work is to form a complex view of the development of tourism in the European North of the Russian Federation on the basis of general tendencies and specifics of its development in the regional context.

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For citation: Kondrateva S.V. *Tourism Development in the Regions of the European North. Arktika i Sever [Arctic and North]*, 2022, no. 47, pp. 164–187. DOI: 10.37482/issn2221-2698.2022.47.164

Theoretical aspects of tourism development in the European North

The studied regions of the European North cover a small part of the northern (Arctic) territories of the Russian Federation (the Murmansk Oblast and the Nenets Autonomous Okrug are fully referred to the Arctic zone of Russia, the Republics of Karelia and Komi, as well as the Arkhangelsk Oblast — partly). The location in the northern (Arctic) latitudes (with the exception of the Vologda Oblast) forms the harsh natural and climatic characteristics of the territory of the European North with vulnerable ecological systems. Remoteness from the economic center of the state and peripherality are reflected in most economic areas of development, playing a deterrent role in the development of domestic and international inbound tourism in general.

The unique tourist and recreational potential of territories with preserved original traditions, culture and hospitality of the local population annually attracts increasing flows of Russian and foreign tourists (with the exception of the period of restrictions of the COVID-19 pandemic). According to L. Agafonov, managing director of EastRussia, a member of the Public Council under the Ministry for the Development of the Russian Far East, Murmansk Oblast (about 400 thousand people) and Arkhangelsk Oblast (over 200 thousand people) receive the largest tourist flow among the Russian Arctic destinations ².

The growing interest in the tourist and recreational opportunities of the northern (Arctic) territories materializes in an increasing number of scientific studies by both Russian and foreign scientists devoted to the problems of tourism, its regional specifics, limitations and prospects for the development. Researchers emphasize the significant role of tourist and recreational activities in the socio-economic development of the regions of the European North, as a factor in the development of territories. Sufficiently generalized research can be divided into several main blocks.

First of all, it is necessary to indicate the scientific background on the development of Arctic tourism. Thus, Arctic tourism is positioned as one of the promising tourist areas of development for the northern territories of the Russian Federation, including the European North. The research of scientists reveals the issues of tourist and recreational potential, socio-economic development of tourism, as well as the limitations and prospects of its functioning [1, Lukin Yu.F.; 2, Lukin Yu.F.; 3, Kharlampyeva N.K.; 4, Sevastyanov D.V.]. An example is the work of Yu.F. Lukin, Professor of the Northern (Arctic) Federal University named after M. V. Lomonosov, focusing on the conceptual foundations, essence and delimitation of the definitions of “Arctic tourism” and “Northern tourism”, representing the tourist and recreational potential and strategic opportunities for the development of tourism in the Arctic and the North [1; 2]. The specifics of the development of the Arctic tourism (including three regions of the European North: the Republics of Karelia and Komi, Murmansk Oblast) are presented in the study of an international team [6, Kuklina V., Kuklina M., Ruposov V., Rogov V.]. Some aspects of the competitiveness of the Nenets Auton-

² Arkticheskiy turizm – novye vyzovy dlya biznesa [Arctic tourism – new challenges for business]. Kommersant, 2020, 4 June. URL: <https://www.kommersant.ru/conference/645> (accessed 09 September 2021).

omous Okrug as a destination for Arctic tourism are described in the Russian-Norwegian study [7, Ilkevich S.V., Stremberg P.].

Secondly, scientific research focuses on the functioning of individual components and the tourism sector as a whole in the northern (Arctic) regions of the Russian Federation, including analysis in a regional context. Regarding the territory of the European North, it is necessary to cite works on the assessment of the development of the tourism sector, including in the municipal context [8, Selyakova S.A., Dubinicheva L.V., Markov K.V.; 9, Zhagina S.N., Pakhomova O.M.; 10, Shchenyavskiy V.A.; 11, Stepanova S.V.; 12, Lebedeva E.A.; 13, Yakovchuk A.A.; 14, Zhelnina Z.Yu.], tourism infrastructure [15, Velichkina A.V.; 16, Stepanova S.V.]. Special attention should be paid to studies devoted to the problems of domestic tourism and leisure opportunities for the local population of the northern (Arctic) regions of the Russian Federation on the basis of official statistical and sociological data, conducted by scientists from the Karelian Scientific Center (Petrozavodsk) [17, Morozova T.V., Murina S.G., Bulaya R.V.; 18, Moroshkina M.V., Potasheva O.V., Gienko G.V.] and Northern (Arctic) Federal University [19, Sidorovskaya T.V., Volovik O.A.; 20, Sidorovskaya T.V., Volovik O.A., Sidoruk A.Yu.; 21, Tsvetkov A.Yu.]. The works of scientists emphasize the high importance of availability of tourism and recreation as a necessary condition for the restoration of vitality in the conditions of severe natural and climatic characteristics of residence and life activity.

The next large block of works reveals the general trends and specifics of the development of certain types of tourism in the northern (Arctic) regions of the Russian Federation. The papers analyze the opportunities and modern challenges of the cruise industry development [22, Grushenko E.B.; 23, Pashkevich A., Lamers M.] ecological [24, Zhagina S.N., Toporina V.A.], religious [25, Balabeykina O.A., Gavrilova K.S., Kuznetsova Yu.A.], gastronomic [26, Morozov A.A.], cultural and educational and other types of regional tourism.

One of the tools for assessing the development of the tourism and recreational sphere of activity is the rating of regions, which makes it possible to identify leaders and outsiders in the development of domestic and international inbound tourism in the Russian Federation. In addition, tourism rating contributes to the formation of Russian citizens' preferences for leisure and recreation opportunities, stimulating the development of domestic tourism. Among Russian researchers, the assessment of the tourist potential of the regions of the European North (based on the author's calculation methods) is devoted to the works of V.S. Orlova, associate professor, Vologda State University [27; 28]. However, despite the advantages of the methodology, exclusively expert (subjective) assessments that allow similarity, inconsistency and dependence on the qualifications of the respondents, along with the laboriousness of the procedures, make it difficult to replicate the practice [29, Myakshin V.N., Shaparov A.E., Tikhanova D.V.]. Based on the methodology of system and structural-functional analysis of N. Leiper, the team of authors of the Northern (Arctic) Federal University named after M.V. Lomonosov (Arkhangelsk) proposed an assessment of the tourist potential of the subjects of the Arctic zone of the Russian Federation [29, Myakshin V.N.,

Shaparov A.E., Tikhanova D.V.]. Unfortunately, the scientists have considered only four of the six regions under study, which does not allow us to fully form a comprehensive representation of the European North destination as a whole and to compare the potential of the Russian Federation subjects. The assessment of the positions of the tourist rating of the regions of the European North in this work is based on the open data of the National Tourist Rating ³.

Special attention should be paid to works that reveal the regional tourism development limitations in order to develop a set of measures to overcome the existing challenges. The impact of the new challenge of our time — the COVID-19 pandemic — caused the introduction of restrictions and their strengthening, which negatively affected the functioning of the tourist and recreational sphere of the state in general and its individual regions in particular. An analysis of changes in the tourism sector under the influence of the pandemic is reflected in an increasing number of scientific papers. The regions of the European North are no exception: both emerging negative consequences and the possibility of developing domestic tourism are being studied [30, Eliseeva N.V.; 31, Leonidova E.G.; 32, Leonidova E.G.].

Research methodology

The model platform is six constituent entities of the Russian Federation belonging to the territory of the European North of the Russian Federation: the Republics of Karelia and Komi, the Arkhangelsk, Vologda and Murmansk oblasts, as well as the Nenets Autonomous Okrug.

In order to identify the specifics and general trends of tourism development in the regions of the European North, the paper consecutively considers the following seven blocks:

1. tourist and recreational potential and its promotion on the Internet;
2. tourism infrastructure development;
3. tourism development strategy;
4. dynamics of tourist flows (domestic and organized international);
5. economic factor of domestic tourism development;
6. regions in the National Tourist Rating;
7. factors hindering the development of tourism.

The work also takes into account the impact of the COVID-19 pandemic on the development of the tourism and recreational sphere in the regions of the European North.

The study is based on open statistical data from Rosstat, the official website of the National Tourism Rating for the period 2016–2020. The paper summarizes the theoretical and practical sci-

³ National rating. Official site. URL: <http://russia-rating.ru/info/category/%D1%81%D0%BF%D0%B5%D1%86%D0%BF%D1%80%D0%BE%D0%B5%D0%BA%D1%82%D1%8B> (accessed 17 August 2021).

entific developments of Russian and foreign scientists on the subject under study. Median indicators are calculated.

The limitation of the work is a sufficient level of generalization of the research results due to the use of a limited set of statistical data in the regional context. The results can be considered as a general idea of the development of tourism in the regions of the European North of the Russian Federation based on the identified general trends and specifics, which corresponds to the purpose of the work. This study seems to be a scientific foundation for further detailed studies of the development of the tourist and recreational sphere of activity, which will allow obtaining more specific results and developing recommendations on the basis of them for the development of this sphere of economic activity.

European North of the Russian Federation: general characteristics

The European North is a unique tourist destination with vulnerable ecological systems, preserved original traditions, culture and hospitality of the local population, along with harsh natural and climatic conditions.

From the position of socio-economic geography, the European North is the largest economic region of the European part of the Russian Federation, occupying an area of less than 1.5 thousand km², or about 9% of the total area of the state. The regions that make up the European North differ in socio-economic (for example, demographic aspects, Table 1) and geographical characteristics.

Table 1

General characteristics of the regions of the European North (as of 01/01/2020) ⁴

No.	region	population (thousand people)	large cities (thousand people)	population density, person/km ²	natural increase, decrease per 1 thousand people, 2019
1	Republic of Karelia	614.1	Petrozavodsk — 281.0 Kondopoga — 29.2 Kostomuksha — 29.6	3.4	-5.3
2	Komi Republic	820.5	Syktvykar — 244.4 Ukhta — 93.7 Vorkuta — 52.8	2.0	-2.4
3	Arkhangelsk Oblast (excluding AO)	1092.4	Arkhangelsk — 347.0 Severodvinsk — 182.0 Kotlas — 62.0	1.9 (including AO)	-4.4
4	Vologda Oblast	1160.4	Vologda — 310.3 Cherepovets — 314.8 Sokol — 36.4	8.0	-4.5
5	Murmansk Oblast	741.4	Murmansk — 287.8 Apatity — 54.7 Severomorsk — 53.6	5.1	-2.4
6	Nenets AO	44.1	Naryan-Mar — 25.1	0.2	4.7

*- the administrative centers of the regions are marked in bold

⁴ Compiled by the author based on the source: Rosstat data.

In comparison with the central regions of the Russian Federation, the transport network of the regions of the European North is rather underdeveloped; there is a significant regional differentiation. From the standpoint of tourism development, this seems to be one of the limiting factors; transport accessibility plays a key role in the development of domestic and international inbound tourism. It should be pointed out that the Republic of Karelia and the Murmansk Oblast, unlike the other constituent entities under study, are border regions of the country, with the Russian Federation state border and related border and customs infrastructure running along the external border. This circumstance is important in the development of international tourism, materializing in the dynamics of socio-economic and tourism indicators.

Research results

Regions of the European North as tourist destinations

1. Tourist and recreational potential and its promotion on the Internet

The territory of the European North of the Russian Federation has a unique natural and cultural-historical potential (some types of which are given in Table 2), revealing opportunities for the development of various areas of tourist and recreational activities. For instance, in the territory of the Arkhangelsk Oblast alone, about 10 thousand monuments of history and culture were discovered, including 1.4 thousand objects of cultural heritage of federal significance, in the Republic of Karelia — more than 1.6 thousand⁵.

Table 2

Tourist and recreational potential of the regions of the European North

No.	UNESCO World Heritage Sites, year of inscription	SPNA, year of establishment
<i>Republic of Karelia</i>		
1	- architectural complex of the Kizhi Pogost (1990) - petroglyphs of Lake Onega and the White Sea (2021)	- Reserve Kivach (1931) - Kandalaksha Reserve (1932) - Kostomuksha Reserve (1983) - Vodlozersky NP (1991) - Paanajärvi NP (1992) - Kalevalskiy NP (2006) - Ladoga Skerries NP (2017)
<i>Komi Republic</i>		
2	- virgin forests of Komi (1995)	- Pechoro-Ilych Biosphere Reserve (1930) - Yugyd Va (1994) - Koygorodsky NP (2019)
<i>Arkhangelsk Oblast</i>		
3	- cultural and historical complex "Solovki Islands" (1992)	- Pinezhskiy Reserve (1974) - Vodlozerskiy NP (1991) - Kenozerskiy NP (1991) - Russian Arctic NP (2009) - Onega Pomorye NP (2013)
<i>Vologda Oblast</i>		

⁵ Strategiya sotsial'no-ekonomicheskogo razvitiya Respubliki Kareliya na period do 2030 goda. Rasporyazhenie Pravitel'stva Respubliki Kareliya ot 29.12.2018 g. N 899r-P. [Strategy of socio-economic development of the Republic of Karelia for the period up to 2030. Decree of the Government of the Republic of Karelia dated December 29, 2018 N 899r-P.].

4	- complex of the Feropontov monastery (2000)	- Darwin Biosphere Reserve (1945) - Russian North NP (1992)
<i>Murmansk Oblast</i>		
5	-	- Lapland Biosphere Reserve (1930) - Kandalaksha Reserve (1932) - Pasvik Nature Reserve (1992) - Khibiny NP (2018)
<i>Nenets Autonomous Okrug</i>		
6	-	- Nenets Nature Reserve (1997)

With an increase in living standards, mobility and computer literacy of the population, the possibilities of the Internet acquire high importance in promoting the tourist and recreational potential and tourist services of the region. There is an increase in the share of independent tourists in the total inbound tourist flow (for example, in the Arkhangelsk region, the share of organized tourists is about 10%)⁶. In this regard, one of the important roles is assigned to tourist portals, which allow potential visitors to form a comprehensive idea of the unique natural, cultural and historical possibilities of the territories, to get acquainted virtually with the original culture and traditions of the chosen destinations, to create their own route for visiting or to use the services of regional tourism companies. The surveyed regions are quite clearly represented in the Internet (table 3) However, with the exception of the Republic of Karelia, the content about the tourist and recreational opportunities of the territories is focused exclusively on the Russian and English-speaking audience, and a number of portals have no English version or its work is significantly limited.

Table 3

Tourist portals of the regions of the European North

Tourist portal	Web site	Foreign language
<i>Republic of Karelia</i>		
Karelia. Tourist portal	http://www.ticrk.ru/	English
Tourist portal of Petrozavodsk	http://visitpetrozavodsk.ru/	English and Finnish
<i>Komi Republic</i>		
Tourist Information Center of the Komi Republic	https://tourism.rkomi.ru/	English
<i>Arkhangelsk Oblast</i>		
Tourist portal of the Arkhangelsk Oblast	https://pomorland.travel/	-
<i>Vologda Oblast</i>		
Tourist portal of the Vologda region	https://welcomevolgograd.com/	English
Tourist Information Center of the Vologda region	https://vologdatourinfo.ru/	English
Official tourist portal of the city of Vologda	https://turvologda.ru/	English (partially)
<i>Murmansk Oblast</i>		
Tourist portal of the Murmansk Oblast	http://murman-turist.ru/	-
Tourism portal of Murmansk	https://tour.murman.ru/	English
<i>Nenets Autonomous Okrug</i>		
Arctic tourism center	http://www.visitnao.ru/	-

⁶ Kontseptsiya razvitiya turizma v Arkhangel'skoy oblasti. Uтверждена постановлением Правитель'sтва Arkhangel'skoy oblasti ot 19 yanvarya 2021 g. № 1-pp. [The concept of tourism development in the Arkhangelsk region. Approved by the Decree of the Government of the Arkhangelsk Region dated January 19, 2021 No. 1-pp.].

It should be noted that all regions of the European North are presented on the website of the National Tourist Portal Russia travel (<https://russia.travel/>). In addition, in order to form a positive tourist image and position the European North in the Russian and international tourism services markets, the regions regularly, independently or jointly, take part in the largest international tourism exhibitions in Russia and abroad.

2. *Tourism infrastructure development*

The tourism infrastructure seems to be one of the key elements of the effective functioning of the tourism and recreational sphere of activity, the provision of a range of competitive tourism services in the face of increasing competition for tourist flows and investments. To a large extent, determining the possibilities of using the tourist and recreational potential of the territory, the tourist infrastructure saturates the interests of not only domestic and international tourists, but also satisfies the needs of the local population in recreation and recreation [16, Stepanova S.V.; 33, Stepanova S.V.].

The study of tourist infrastructure development in the European North is based on the calculation of comparable specific indicators to the number of local population in the regional context (units/1 thousand people) of the following components of the infrastructure:

- accommodation infrastructure — the number of collective accommodation facilities (CAF) and the number of sanatorium-resort organizations;
- food infrastructure — the number of restaurants, cafes, bars;
- leisure and recreation infrastructure — the number of museums of the Ministry of Culture of the Russian Federation, the number of tour operators included in the unified federal register.

Comparison of the tourist infrastructure of the European North (Table 4) with the median values of the regions, fully or partially belonging to the Arctic zone of the Russian Federation, allows us to form a general idea of the level of its development and specifics in the regional context. The comparison reveals the low positions of the European North destinations in terms of the development of tourism infrastructure. According to the presented specific indicators, the leading positions are occupied by the Vologda Oblast, the only studied region not included in the Arctic zone of the Russian Federation. Among the Arctic regions, the Murmansk Oblast and the Nenets Autonomous Okrug are the leaders.

Table 4

Comparative characteristics of the level of development of tourism infrastructure in the regions of the European North, 2020

No.	region	number of tour operators included in the unified federal register ⁷		number of collective accommodation facilities ⁸		number of health resort organizations ⁹		number of museums of the Ministry of Culture of the Russian Federation ¹⁰		number of restaurants, cafes, bars ¹¹ , 2019	
		un.	un. /thous. people	un.	un. /thous. people	un.	un. /thous. people	un.	un. /thous. people	un.	un. /thous. people
1	Republic of Karelia	55	0.09	245	0.4	5	0.008	18	0.03	433	0.7
2	Komi Republic	6	0.01	114	0.14	10	0.012	24	0.03	423	0.5
3	Arkhangelsk Oblast (without AO)	21	0.02	164	0.15	9	0.008	28	0.03	875	0.8
4	Vologda Oblast	42	0.04	255	0.22	14	0.012	41	0.04	799	0.7
5	Murmansk Oblast	64	0.09	185	0.25	8	0.011	12	0.02	638	0.9
6	Nenets AO	1	0.02	8	0.18	0	0	2	0.05	34	0.8
	regions fully or partially related to the Arctic, median	-	-	-	0.19	-	0.012	-	0.035	-	0.84

The COVID-19 pandemic has had a significant negative impact on the development of the tourism and recreational activities in the regions of the European North of the Russian Federation, which materializes in the dynamics of the decline in the following indicators. Compared to 2019, the volume of paid services to the population of the studied regions per capita also decreased in 2020 (median):

- *hotel services and similar temporary accommodation services* — by 20%. The only exception was the Republic of Karelia, the only region with positive growth (+10%), which may be due to the high tourist attractiveness of the territory as a unique destination in the north of Europe, formed by a tourist and transport and logistics infrastructure, as well as an advantageous economic and geographical position to the central cities of Moscow and St. Petersburg. The most significant drop in the indicator was in the Vologda Oblast (-36%) and the Komi Republic (-33%).
- *services of specialized collective accommodation facilities* — by 28.5%. This category of accommodation facilities includes sanatorium and resort organizations, houses and recreation centers, campsites, tourist camps, tourist trains, cruise and pleasure boats, etc. The enterprises of the Murmansk Oblast (-61%) and the Komi Republic (-57%) suffered the most.

⁷ Unified federal register of tour operators. Official site of the Federal Agency for Tourism. URL: <https://tourism.gov.ru/operators/> (accessed 08 December 2021).

⁸ Number of collective accommodation facilities. Official website of the EMISS state statistics. URL: <https://www.fedstat.ru/indicator/> (accessed 08 December 2021).

⁹ Number of health resort organizations. Official website of the EMISS state statistics. URL: <https://www.fedstat.ru/indicator/42106> (accessed 08 December 2021).

¹⁰ Number of museums of the Ministry of Culture of Russia. Official website of the EMISS state statistics. URL: <https://www.fedstat.ru/indicator/37797> (accessed 08 December 2021).

¹¹ Number of public catering facilities. Official website of EMISS state statistics. URL: <https://www.fedstat.ru/indicator/43260> (accessed 08 December 2021).

- *services of travel agencies, tour operators and other booking services and related services* — by 54.5%. The sharpest decline is observed in the Komi Republic (-73%), the Arkhangelsk Oblast and the Nenets Autonomous Okrug (-64–65%)

3. *Tourism development strategy*

Currently, tourism development in the regions of the European North is positioned as one of the priority and/or promising areas of economic activity, which is reflected in the main strategic documents of socio-economic development of the studied subjects of the Russian Federation. Thus, the Strategy for the socio-economic development of the Republic of Karelia for the period up to 2030¹² defines the development of tourism and the hospitality industry as one of the priority areas for regional development. According to the Strategy for the socio-economic development of the Arkhangelsk Oblast up to 2035, the region “will take the place of a leader in the field of Arctic tourism, a network of rural tourist destinations of ethnographic, ecological and agro-tourism will be developed”¹³. The high importance of tourism and recreation in regional development is the basis for the development, improvement and implementation of the system of target documents for strategic planning of tourism promotion. The legal bases for the development of these regional policies are the documents of the federal level:

- Federal Law No. 132-FZ dated November 24, 1996 “On the fundamentals of tourism activities in the Russian Federation”;
- Federal Law No. 193-FZ dated July 13, 2020 “On state support for entrepreneurial activities in the Arctic Zone of the Russian Federation”;
- Strategy for the development of the Arctic zone of the Russian Federation and ensuring national security for the period up to 2035 (Decree of the President of the Russian Federation of October 26, 2020 No. 645);
- The State Program of the Russian Federation “Economic Development and Innovative Economy” (Decree of the Government of the Russian Federation of April 15, 2014 No. 316);
- Strategy for the development of tourism in the Russian Federation for the period up to 2035 (Decree of the Government of the Russian Federation dated September 20, 2019 No. 2129-r);

¹² Strategiya sotsial'no-ekonomicheskogo razvitiya Respubliki Kareliya na period do 2030 goda. Rasporyazhenie Pravitel'stva Respubliki Kareliya ot 29.12.2018 g. N 899r-P. [Strategy of socio-economic development of the Republic of Karelia for the period up to 2030. Decree of the Government of the Republic of Karelia dated December 29, 2018 N 899r-P.].

¹³ Strategiya sotsial'no-ekonomicheskogo razvitiya Arkhangel'skoy oblasti do 2035 goda, utverzhennaya oblastnym zakonom ot 18 fevralya 2019 goda № 57-5-OZ. [Strategy for socio-economic development of the Arkhangelsk region up to 2035, approved by the regional law of February 18, 2019 No. 57-5-OZ.].

- Strategies for socio-economic development of the North-Western Federal District for the period up to 2020 (Decree of the Government of the Russian Federation of November 18, 2011 N 2074-r);
- Concepts of the federal target program “Development of domestic and inbound tourism in the Russian Federation (2019-2025)” (Decree of the Government of the Russian Federation of 05.05.2018 N 872-r).

Summarizing the main goals of regional strategic documents for the development of tourism, it is possible to formulate a single general direction for applying efforts: creating conditions for growth and improvement of competitiveness of the tourism sector in the Russian and international markets for tourism services with detailed implementation tasks¹⁴. In addition, examples of strategic documents for the development of tourism at the level of municipalities in the regions of the European North (for example, Syktyvkar and Vorkuta of the Komi Republic; Kostomuksha, the Republic of Karelia; Vologda, Vologda Oblast, etc.) should be given.

4. Dynamics of tourist flows

One of the indicators that, with a certain degree of conventionality, allow to comprehensively assess the volume of both organized and unorganized tourist flows (including both individual tourists and visitors of regions with business and other visiting purposes), is the number of citizens (foreign and Russian) placed in collective accommodation facilities (CAF). For reference: CAF combine hotels with similar accommodation facilities and specialized accommodation facilities. According to calculations, the leading positions in quantitative indicators of accommodation of

¹⁴ Kontseptsiya razvitiya turizma v Arkhangel'skoy oblasti. Utverzhdena postanovleniem Pravitel'stva Arkhangel'skoy oblasti ot 19 yanvarya 2021 g. № 1-pp; Strategiya razvitiya turistsko-rekreatsionnogo klastera Murmanskoy oblasti na 2021–2025 gody. Rasporyazhenie Pravitel'stva Murmanskoy oblasti ot 21.04.2021 g. № 72-RP; Strategiya sotsial'no-ekonomicheskogo razvitiya Respubliki Komi na period do 2035 goda. Postanovlenie Pravitel'stva Respubliki Komi ot 11.01.2019 g. N 185; Gosudarstvennaya programma Respubliki Kareliya «Razvitie turizma». Postanovlenie Pravitel'stva Respubliki Kareliya ot 28.01.2016 g. № 11-P s izm. ot 30.03.2021 g.; Strategii razvitiya turistsko-rekreatsionnogo klastera Nenetskogo avtonomnogo okruga na peri-od do 2022 goda. Postanovlenie Gubernatora Nenetskogo avtonomnogo okruga ot 15.12.2017 g. № 105-pg; Gosudarstvennaya programma Respubliki Komi «Razvitie kul'tury i turizma». Postanovlenie Pravitel'stva respubliki Komi ot 31.10.2019 g. № 524 s izmeneniyami ot 08.09.2021 g.; Strategiya sotsial'no-ekonomicheskogo razvitiya Arkhangel'skoy oblasti do 2035 goda, utverzhdannaya oblastnym zakonom ot 18.02.2019 g. № 57-5-OZ; Programma razvitiya territorial'nogo turistskogo klastera Vologodskoy oblasti. Postanovlenie Pravitel'stva Vologodskoy oblasti ot 28.03.2016 g. № 265 [The concept of tourism development in the Arkhangelsk region. approved by Decree of the Government of the Arkhangelsk oblast dated January 19, 2021 No. 1-pp; Strategy for the development of the tourist and recreational cluster of the Murmansk oblast for 2021–2025. Decree of the Government of the Murmansk oblast dated April 21, 2021 No. 72-RP; Strategy for socio-economic development of the Komi Republic for the period up to 2035. Decree of the Government of the Republic of Komi dated January 11, 2019 N 185; State program of the Republic of Karelia "Development of tourism". Decree of the Government of the Republic of Karelia dated January 28, 2016 No. 11-P, as amended on March 30, 2021; Development strategies for the tourist and recreational cluster of the Nenets Autonomous Okrug for the period up to 2022. Decree of the Governor of the Nenets Autonomous Okrug dated December 15, 2017 No. 105-pg; State program of the Republic of Komi "Development of culture and tourism". Decree of the Government of the Republic of Komi dated October 31, 2019 No. 524, as amended on September 8, 2021; Strategy for socio-economic development of the Arkhangelsk oblast up to 2035, approved by the regional law of February 18, 2019 No. 57-5-OZ; Program for the development of the territorial tourist cluster of the Vologda Oblast. Decree of the Government of the Vologda Oblast dated March 28, 2016 No. 265.].

citizens in CAF in 2019–2020 (Table 5) are occupied by the Republic of Karelia and the Vologda Oblast, while the Nenets Autonomous Okrug is at the bottom of the list of surveyed regions. Examination of flows in terms of citizenship of those accommodated in the CAF reveals the predominant role of in-state flows, including domestic tourism, which, however, is typical for all Russian regions. On average, about 14.4 thousand foreign citizens stayed in collective accommodation facilities in the Russian regions in 2019. The Murmansk Oblast and the Republic of Karelia exceed the Russian median: 3.9 times and 3.3 times, respectively.

Table 5

*Indicators of Russian and foreign citizens' accommodation in the CAF, 2019–2020*¹⁵

No.	region	Number of Russian citizens accommodated in CAF ¹⁶ , pers.		Number of Russian citizens, % 2020/ 2019	Number of foreign citizens accommodated in CAF ¹⁷ , pers.		Number of foreign citizens, % 2020/ 2019	Decline in the number of citizens accommodated in 2020 by 2019	
		2019	2020		2019	2020		pers.	%
1	Republic of Karelia	435 269	381 268	0.88	47 548	6 786	0.14	94763	0.2
2	Komi Republic	228 144	141 619	0.62	5 229	2 094	0.4	90056	0.39
3	Arkhangelsk Oblast without AO	334 343	194 103	0.58	12 433	2 095	0.17	150578	0.43
4	Vologda Oblast	468 083	279 338	0.6	9 045	2 821	0.31	194969	0.41
5	Murmansk Oblast	263 791	226 461	0.86	55 789	30 799	0.55	62320	0.26
6	Nenets Autonomous Okrug	12 685	8 262	0.65	333	69	0.21	4687	0.36

Under the COVID-19 pandemic, the year 2020 saw a dramatic decrease in the number of foreigners accommodated in the CAF compared to the figures for 2019, which was not compensated by the number of Russian citizens, also characterized by a decline in flow.

The calculation shows that the Vologda and Arkhangelsk oblasts (excluding AO) suffered the most serious losses in the number of Russian and foreign citizens accommodated in 2020 compared to 2019: -195 thousand people and -151 thousand people, respectively. Despite the most significant reduction in the number of foreign citizens accommodated in the CAF (more than 40 thousand people or by 86%), the Republic of Karelia is characterized by the lowest share of losses in guest arrivals (-20%).

Considering the importance of international inbound tourism development, it is important to consider the organized inbound tourist flow, as well as to compare it with the outbound one in the regions of the European North for the period 2016–2019 (Table 6).

¹⁵ Source: Compiled and calculated by the author based on State Statistics data.

¹⁶ The number of citizens of the Russian Federation placed in collective accommodation facilities (Rosstat). Official site of the Federal Agency for Tourism. URL: <https://tourism.gov.ru/contents/analytics/statistics/chislennost-grazhdan-rossiyskoy-federatsii-razmeshchennykh-v-kollektivnykh-sredstvakh-razmeshcheniya/> (accessed 08 December 2021).

¹⁷ The number of foreign citizens placed in collective accommodation facilities (Rosstat). Official site of the Federal Agency for Tourism. URL: <https://tourism.gov.ru/contents/analytics/statistics/chislennost-inostrannykh-grazhdan-razmeshchennykh-v-kollektivnykh-sredstvakh-razmeshcheniya-rosstat/> (accessed 08 December 2021).

Table 6

*Comparative characteristics of the development of international organized tourism*¹⁸

	region	Total inbound tourism flows, 2016–2019 ¹⁹ , pers.	Intensity of international arrivals, 2019, persons/thousand people	Total outbound tourism flows, 2016–2019 ²⁰ , pers.	Intensity of international departures, 2019, persons/thousand people
1	Republic of Karelia	21 489	14.0	368 275	155.7
2	Komi Republic	148	0	158 819	62.1
3	Arkhangelsk Oblast	267	0.05	274 574	78.8
4	Vologda Oblast	141	0	298 094	93.6
5	Murmansk Oblast	12274	4.3	112 225	47.6
6	Nenets AO	132	0.57	8 248	51.8

Calculation of the total volume of international organized tourism in terms of inbound and outbound tourist flows for the period 2016–2019 allows avoiding sharp fluctuations in the number of foreign tourists hosted in the studied regions, as well as in the number of Russian tourists sent abroad by tourist companies of the Russian Federation. The indicator of international tourist arrivals and departures intensity, calculated to the population of the constituent entities of the Russian Federation (person/thousand people), allows a full comparison of the level of international tourism development in the regional context.

Comparison of inbound and outbound international organized tourist flows reveals a significant prevalence of international outflows in both quantitative and specific indicators. At the same time, it should be emphasized that the regions of the European North in the development of outbound tourism are significantly ahead of the average Russian values (the median intensity of international arrivals is 0.05, departures — 42.4). The development of international inbound tourism can be discussed only in relation to two subjects under study: the Republic of Karelia and the Murmansk Oblast, characterized by a significant excess of the median value in Russia (which is confirmed by the data on the accommodation of foreign citizens in the CAF). In addition, it should be noted that, being border regions, these regions have international road border crossings that allow increasing the cross-border tourist flow to the region [11, Stepanova S.V.] at the expense of independent tourists from neighboring countries (including day-shopping tourists and travelers with medical and other purposes), not included in these statistics.

5. *Economic factor of domestic tourism development*

The accessibility of tourism and recreation to residents of the northern (Arctic) regions, characterized by harsh natural and climatic conditions of life, is becoming an important factor in the restoration of physical and emotional power of a person, the reproduction of human capital. Taking into account the significant role of the economic factor that determines the possibility of

¹⁸ Source: Compiled and calculated by the author based on State Statistics data.

¹⁹ Number of foreign tourists received. EMISS. Government statistics. URL: <https://fedstat.ru/indicator/31598> (accessed 08 December 2021).

²⁰ The number of Russian tourists sent on tours. EMISS. Government statistics. URL: <https://fedstat.ru/indicator/31591> (accessed 08 December 2021).

tourist travel, the choice of destination and leisure activities for the population of the studied regions, two calculated indicators are considered: the index of priority spending on recreation and cultural events; the index of priority spending on services of hotel and catering enterprises. The calculation of the indicators is based on the structure of consumer spending of households according to the results of a sample survey of household budgets (%), Rosstat data), reflecting the propensity of the regions' population to spend money on leisure and cultural activities, on receiving hotel and catering services. The study presents data for 2018 as the period of the most complete presentation of available statistical information on the regions of the European North (Table 7).

Table 7
*Expenditures of the population in the regions of the European North for tourism and recreation, 2018*²¹

No.	region	organization of recreation and cultural events	hotels, restaurants and cafes
1	Republic of Karelia	0.83	0.46
2	Komi Republic	0.75	0.66
3	Arkhangelsk Oblast	1.04	1.11
4	Nenets Autonomous Okrug	0.69	0.00
5	Vologda Oblast	1.01	1.00
6	Murmansk Oblast	1.01	0.86
	median across Arctic regions	0.75	0.66

Comparison of the calculated indicators with the average for the Arctic regions (the values are generally similar for the Russian Federation) reveals the leading positions of the Arkhangelsk and Vologda, and then the Murmansk oblasts. The position of the Republic of Komi reflects the average values for the regions of the Russian Arctic. In summary, it can be said that the economic opportunities of the population of the European North in organizing and carrying out leisure and recreation activities are higher than the average in the Russian Federation and the Arctic.

6. Regions in the National Tourist Rating

One of the tools for assessing development of tourism and recreation is the rating of regions, which allows identifying leaders and outsiders in the development of domestic and international inbound tourism in the Russian Federation. Moreover, tourism rating contributes to the formation of Russian citizens' preferences for leisure and recreation opportunities, stimulating the development of domestic tourism.

The assessment of tourist potential of the regions of the European North, calculated on the basis of the author's methodology (taking into account the image of the tourist region, the level of tourist infrastructure development, tourism labor potential, transport accessibility of the region, environmental attractiveness of the territory, comfort and safety of tourists), allowed V.S. Orlova (Vologda State University) to rank the subjects of the Northwestern Federal District. The Republic of Karelia and the Vologda Oblast take the leading positions among the studied regions, yielding to

²¹ Calculated by the author on the basis of State statistics: Regions of Russia. Socio-economic indicators. 2020: R32 Stat. Sat. / Rosstat, M., 2020. 1242 p.

St. Petersburg and the Leningrad Oblast, while the Murmansk Oblast, according to the researcher, closes the tourist rating [27]. In general, according to the calculations, “the competitive component of the tourist market of the European North... is under development” [28, Orlova V.S.]. However, despite the advantages of the methodology, exclusively expert (subjective) assessments, allowing similarity, inconsistency and dependence on the qualifications of the respondents, along with the complexity of the procedures, make it difficult to replicate the practice [29, Myakshin V.N., Shaparov A.E., Tikhanova D.V.].

Based on the methodology of systemic and structural-functional analysis of N. Leiper, the team of authors of the Northern (Arctic) Federal University named after M.V. Lomonosov (Arkhangelsk) proposed an assessment of the tourist potential of the subjects of the Arctic zone of the Russian Federation [29, Myakshin V.N., Shaparov A.E., Tikhanova D.V.]. Unfortunately, out of the six regions studied, scientists have considered only four ones, which does not allow to form a comprehensive representation of the destination of the European North as a whole and to compare the potential of the subjects of the Russian Federation. The advantages of calculating the National Tourist Rating, developed by the Center for Information Communications “Rating” together with the magazine “Recreation in Russia”, are its comprehensiveness, the consideration of official statistics, as well as the assessment of all Russian regions, which makes it possible to form an idea of the “tourist” positions of the regions and trends in its development ²².

According to the National Tourism Rating, the criteria for assessing the development of the tourism sector of Russian regions are nine main groups of indicators that allow a comprehensive evaluation of tourist attractiveness and potential of territories ²³: level of development of the hotel business and infrastructure; importance of the tourism industry in the economy of the region; profitability of the tourism and hospitality industry in the region; popularity of the region among tourists who come for several days; popularity of the region among foreigners; tourist uniqueness; crime level; interest in the region as a place of recreation on the Internet; promotion of the region’s tourism potential in the information space. It should be pointed out that the methodology of rating calculation has changed slightly over time, but this is not decisive when comparing data from different years.

According to the open data of the National Tourist Rating for the period 2016–2020, the regions of the European North, with the exception of the Nenets Autonomous Okrug, belong to the second group, labelled as “strong pros” ²⁴. At the same time, in our opinion, the generalization

²² National rating. Official site. URL: <http://russia-rating.ru/info/category/%D1%81%D0%BF%D0%B5%D1%86%D0%BF%D1%80%D0%BE%D0%B5%D0%BA%D1%82%D1%8B> (accessed 17 August 2021).

²³ Ibid.

²⁴ National rating. Official site. URL: <http://russia-rating.ru/info/category/%D1%81%D0%BF%D0%B5%D1%86%D0%BF%D1%80%D0%BE%D0%B5%D0%BA%D1%82%D1>

of the values of places in the rating from 21 to 69 seems to be quite extensive; more details on the levels of tourist attractiveness is required.

In general, the regions of the European North (Table 8) are characterized by the retention of their positions in the ranking for the study period of 2016–2020, with the only exception of the Murmansk Oblast (decrease). In addition, it should be noted the high values of the rating in 2016 for all the studied regions, which may be due to the first experience of compiling it.

Table 8

*Positions of regions in the National Tourism Rating for the period 2016–2020*²⁵

No.	region	2016	2017	2018	2019	2020
1	Republic of Karelia	22	35	38	29	31
2	Vologda Oblast	29	49	47	37	34
3	Arkhangelsk Oblast	31	47	49	54	38
4	Murmansk Oblast	26	46	46	48	53
5	Komi Republic	61	74	68	68	69
6	Nenets Autonomous Okrug	81	84	83	85	83

Based on the median values, it can be concluded that the tourist attractiveness of the studied regions decreases from the Republic of Karelia and the Vologda Oblast to the Murmansk and Arkhangelsk oblasts, the Komi Republic; the Nenets Autonomous Okrug becomes the last in the ranking. According to the National Tourism Rating, the impact of the COVID-19 pandemic on the tourist attractiveness of regions in 2020 compared to 2019 manifested itself differently. For example, three constituent entities of the Russian Federation strengthened their positions in the National rating (the Arkhangelsk Oblast raised by 16 points, the Vologda region and the Nenets Autonomous Okrug raised by 2–3 points).

7. Factors hindering the development of tourism

On the basis of regional strategic documents for the development of tourism in the regions of the European North and the theoretical and practical developments of researchers, the main negative factors that have a restraining effect on the use of the tourist and recreational potential of the studied territories and the functioning of the tourism sector have been identified. Factors hindering the development of tourism include:

- insufficient level of development of tourism infrastructure, including accommodation, catering, leisure and recreation infrastructures;
- insufficient level of development of transport infrastructure, including the level of development of roadside and water infrastructure;
- inaccessibility and remoteness of objects of tourist display, including territorial remoteness and seasonal factor;
- insufficient level of tourist services, including compliance with international standards of tourist services;

²⁵ Source: compiled by the author based on data from the National Tourism Rating.

- insufficient recognition of the regional tourist product in the Russian and international markets of tourist services, including the lack of promotion, including the European North destination;
- insufficient level of qualification of personnel serving tourists;
- lack of uniformity of tourism products, including lack of inter-regional cooperation.

In addition, the high cost of tourism services and tourism products, due to the natural and climatic conditions of the regions and the decreasing ability to pay for Russian tourists, should be pointed out. The continuation of the action, as well as the strengthening of restrictive measures in connection with the new challenge of our time — the COVID-19 pandemic, can have a significant negative impact on the functioning of the tourism sector in the regions of the European North.

Conclusion

The study made it possible to form a general idea of the development of tourism in the European North of the Russian Federation based on the identified general trends and specifics of the development of the tourism and recreational activities in the regional context. The European North, represented by six subjects of the Russian Federation, is quite heterogeneous in terms of tourist and recreational potential and the level of development of the tourist and recreational sphere. At the same time, the destination has specific opportunities for the development of tourism and recreation and is characterized by general trends in its development. Summarizing the above, several main conclusions about the development of the tourist destination of the European North (according to the blocks considered) can be highlighted:

- the territory has a unique natural and cultural-historical potential, including original traditions, culture and hospitality of the local population, a large number of objects of tourist display, including objects of the UNESCO World Heritage List;
- the level of development of tourism infrastructure requires strengthening positions in the market of tourism services, including the infrastructure of accommodation, food, leisure and recreation;
- the development of tourism in the regions of the European North is positioned as one of the priority and/or promising areas of economic activity, which is reflected in the main strategic documents of the socio-economic development of the studied subjects of the Russian Federation;
- Russian tourists prevail in the inbound tourist flow to the European North; the international organized inbound flow is underdeveloped, significantly yielding to the outbound flow of Russians abroad;

- the economic opportunities of the population of the European North in organizing and conducting leisure and recreation are higher than the average for the Russian Federation and the Arctic.
- the regions of the European North are characterized by holding their positions in the National Tourism Rating for the study period 2016–2020 (decrease in Murmansk Oblast).
- the main constraints to tourism development are the following: insufficient level of development of tourism and transport infrastructure, insufficient level of tourism services, insufficient recognition of the regional tourism product in the Russian and international markets for tourism services, inaccessibility and remoteness of tourist display facilities.

Summarizing the above, it is necessary to focus on the uniqueness of the northern (Arctic) tourist destination of the European North of the Russian Federation. The COVID-19 pandemic, having had a significant negative impact on the development of the tourism and recreational activities in the regions of the European North, has made significant adjustments to the functioning of organizations focused on tourist services (up to the closure of individual enterprises). In this regard, the tourist and recreational sphere of the destination requires rethinking of the directions of development and vectors of focus.

Orientation towards Russian domestic tourists, promotion of the northern (Arctic) destination in the market of Russian tourist services seems to be one of the key areas for the development of tourism in the face of modern challenges and the termination of the international tourist flow. It seems important to cooperate with tourism business enterprises and related organizations involved in servicing vacationers in order to offer target group-oriented tourism products, which requires separate sociological studies to identify the key needs of consumers of tourism services.

It is necessary to identify the needs for recreation and tourism of the local population of the European regions with a significant narrowing of the choice of destinations under the influence of modern restrictions. It should be emphasized that in addition to the interests of business, the restoration of the physical and emotional strength of the local population is of high importance for the socio-economic development of the northern (Arctic) regions. Residents of the studied regions of the Russian Federation are among the most vulnerable from the standpoint of the severity of the natural and climatic conditions of life, therefore they need full-fledged recreation and rest. Tourist and recreational services for the local population should be focused on the tourism business, forming and offering tourist products oriented to local demand and needs (weekend tours, special offers, family vacations, etc.).

The search, including the identification of needs of target groups of tourists and recreationists, the formation of unique tour products, including through the combined efforts of tourism business regions of the European North, competent promotion of tour services will increase the

competitiveness of destinations in the domestic tourism market, creating a platform for getting out of modern challenges and, after the opening of national borders, for the development of international tourism.

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*The article was submitted 19.11.2021; approved after reviewing 07.12.2021;
accepted for publication 09.12.2021.*

The authors declare no conflicts of interests.