



Tourist Complex of South of Russia in the Current Conditions: The Krasnodar Region and the Republic of Crimea

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ABSTRACT

In whole, the tourist recreational complex of the Krasnodar region is similar to the tourist recreational complex of the Crimea republic: In density of population, in enterprise proportions of agriculture and tourism, in climate and peculiarities of territorial specialization. The purpose of investigation was to determine possible development ways of tourist recreational complex of Russian South in new geo-economical and geopolitical conditions. A comparative study of these two tourist regions, existed in almost equal development conditions for many decades, was carried out as per such categories, as the prices, the service and the climate. The Krasnodar region, undoubtedly, wins in the bulk of tourist visits, in quantity of accommodation service, quality of infrastructure and quantity of working resorts, level of medical assistance. The Crimea republic is more attractive by lower prices, wider spectrum and efficiency of natural resources, used for recreation. The Crimea republic and the Krasnodar region are unique from the viewpoint of their health-improving potential. The changes of geopolitical and geo-economical character introduce definite corrections to the development directions of tourist recreational complexes of the Krasnodar region and the Crimea republic. Both regions are characterized by definite positive features, although there are some disadvantages, which are to be eliminated. From our point of view, both regions are able to develop the tourist recreational complex maximally in case of cooperation.

Keywords: Tourism, Tourist Recreational Complex, The Krasnodar Region, The Crimea Republic

JEL Classifications: L83, P25

1. INTRODUCTION

For the last several years, the tourist recreational complex of Russian South experienced both positive and negative disturbances. Comprisal of the Crimea republic to the Russian Federation, the formation of Crimea Federal District, obviously, will result into transformation of tourist market of the Russian South. The resorts of the Black Sea coast of the Krasnodar region and Crimea will begin a competitive struggle for tourists sooner or later.

In Russian Empire, as early as the XIX century, the Crimea became the place of coastal recreation of the Russian elite,

including the members of imperial family name. It was also widely popular among the Russian middle class, including arts intelligentsia. Still, in real life, the Crimea proved its significance, as the admitted health-recreation center, under the USSR. The USSR government quite quickly estimated the fact, that the Crimea presented practically a unique region in the country with dry and warm climate, close to the Mediterranean Sea in its characteristics. Taking into consideration the favorable conditions for health-resort treatment and health-improving recreation, a unique recreational complex was created on the peninsula for the years of Soviet power (Turitsyn and Simonyan, 2014).

A significant development of the resort sphere in the Soviet Union became possible thanks to the great system of social protection for the population, existed in our country. Labor union organizations, which involved all working citizens, paid for the rest and treatment in health-resort institutions fully or partially; planned distribution of package tours provided the loading of resort institutions for the whole year. Social consumption funds paid for the cost of health-resort treatment and recreation of non-working citizens, who were in need for social support on the part of the society. In 1973, the USSR Council of Ministers approved the Resort Regulations, which served the basis for further development of regulations for each resort, contributing to regulation of housing development of the resort places, strengthening of environmental protection, deepening of specializations of separate resorts. In 1983, one of the most significant social programs in the history of the country was accepted in the USSR - the program of disease prevention and annual health examination for the population, where the leading role belonged to the health-resort institutions. From that time, the majority of large health resorts and centers of the country began to work with full loading for the whole year. At the same time, the shift of the majority of health resorts and recreation centers to the all-year working regime is accompanied by the building of new resort institutions. Despite the fact, that social constituent of recreation development was dominating, great attention was also paid to the economic functions. The most important economic function of the recreation was simple and extended reproduction of labor force. Recreation increases the ability of workers to work, increases the period of full working capability, resulting into increase of working time fund due to sick rate reduction, medical expenses on population are reduced. Besides, the recreation development specified the accelerated development of separate territories, expanded the labor application area and served the balance in the structure of income and expenditures of citizens (Mishchenko, 2007).

Somewhere Yalta and Sochi were a dream of any Soviet vacationer. Today the situation has changed: Former Soviet health-resort institutions give under the rivalry with foreign hotels. Russian tourists began to pay attention to Crimean and Caucasian health resorts, proved by the statistics of annually growing tourist flows to the Black Sea coast. In the Soviet years, the Crimean peninsula was a recreation place, first of all, for secured social groups and political elite. The resorts of the Krasnodar region were never focused exclusively on the citizens of the region, but they revitalized a significant part of population of the Soviet Union and Russia (Mishchenko, 2007).

Insignificant attention on to the tourist sphere on the part of the Ukraine government, imperfection of inter-level budget relations, deficit of financial means and investments became the reason for underdevelopment of tourist and transport infrastructure, insufficiency of hotel accommodation facilities with modern comfort level, medical infrastructure of the objects, meant for the health-resort treatment, modern transport means for sightseeing (Vengerovsky and Dakhnenko, 2014).

Joining of the Crimea republic to the Russian Federation can increase the attractiveness of inner tourism, but only in case

of investments to the development of transport and social infrastructure of the Russian South in whole. According to the experts estimates, the resorts of the Crimea republic will be able to get on in the ground floor and to compete fully with the resorts of the Krasnodar region in 10 years at the soonest (Nikishov, 2015).

Russian government, having developed long-term development programs for the Crimea, predicts a breakthrough in development of tourist, hotel and health-resort complex. It will be the priority in regional economy (Spasibenko, 2015).

Since before the present time, it was possible to reveal the following tendencies in development of the Krasnodar region, as a recreation area: The volume growth of services in the institutions of health and tourist complex was observed; the volume of health-resort improving services increased, as well as the volume of hotel services. For the further branch development, the attraction of vacationers, the increase of budget output in the region, the executed works were aimed at the following: The development of production basis, the improvement of advertising campaign, the creation of recording system of businessmen activity, who provide services in flat renting for the vacationers. The development prospect of the Krasnodar region, as a resort, mainly depends on the quality and diversity of its unique natural curative resources. Tourism development results both in positive and negative environmental consequences. The development of recreational sphere is conditioned by many factors, both natural and social-economic. Their role is being changed at different development stages depending on the recreational system and its relations with natural and social systems. For a long time, the formation and development of recreational system took place under the planned-administrative system (The Ministry of Tourism and Resorts of the Crimea Republic, 2015).

The Olympic games in Sochi; considerable volumes of funding to the tourism sphere of the Krasnodar region and Russian South in whole; the access to the international tourism market; the sharp growth of investment attractiveness have been replaced by the economic crisis, which reduced the flows of tourists and recreants; the appearance of new competitor, represented by the tourist-recreational complex of the Crimea republic and, consequently, redistribution of tourist flows. Activation of development of tourist-recreational sphere of the Krasnodar region resulted in intense formation of large and small hotels, nets, and in the intensification of interest to this region on the part of large players of the international market of hotel services (Maksimov et al., 2014); however, due to the world economic crisis and unstable situation of the world political market, at present, this interest can be characterized as quite constrained. The health-resort and tourist complex of the Krasnodar region is the largest in the Russian Federation and presents a combination of health-resort organizations, hotels, specialized and individual accommodation facilities, tourist and excursion companies, infrastructure objects, tourist attractions and resort management bodies (Volkova et al., 2014).

According to the sociological survey, conducted by "Levada-Center" in August of 2015, 38% of Russians named the Crimea

as the most desirable place to visit and rest among the regions of Russian Federation. Transport problem was always and still stays one of the difficult problems in formation of stable flows to Crimea.

In 2014, a demand for beach recreation in the Krasnodar region increased by 30% as per experts estimate. The hotel facilities of the most popular resorts of the Krasnodar region in the height of season were booked out by more than 90%. It was for a variety of reasons, the most important of which was the ferry to the Crimea. Thus, Anapa, located closer to the Taman peninsula, experienced unprecedented increase of the tourist flow, which nearly resulted in the environmental problems (city systems did not cope with the huge flow of tourist). Similar situation happened in Temryuksk region of the Krasnodar region, closest to the Crimea. Sochi in 2014 took more than 5 million tourists, half as much as the average data.

The annual flow of tourists to the Crimea republic is 5-6 million people on the average. The main purpose of their visit is health care and “beach” recreation (56.2%), treatment - 15.3%. According to the sociological studies, a tourist, coming to the Crimea, spends from 1 to 1.5 thousand US dollars per 12-13 days of recreation (Plugar, 2014).

Growing demand for the domestic tourism facilities will stimulate investors to put up the capital to the development of hotel base on popular Russian resorts (Istomina and Samoylenko, 2015).

2. METHODS

Although the Krasnodar region is three times larger in area and in population, but its 53% of urbanization significantly gives under the Crimea republic with its 68%, thus smoothing the difference. In whole, the regions are similar: In population density, in enterprise proportions of agriculture and tourism, in climate, in peculiarities of territorial specialization. A comparative study of these two regions, existing for many decades in nearly equal conditions, was carried out as per such categories, as prices, service and climate.

To reveal more precise picture, it is necessary to compare per the brightest factor - the characteristics of tourist-recreational complex (Table 1).

The Krasnodar region, in its landscape-climatic characteristics, gives way to the Crimea republic, but has a strong lead in such criteria, as the infrastructure development level, hotel room capacity and transport availability.

A comparative analysis of cultural-historical potential of the region shows, that the absolute superiority belongs to the Crimea republic. The objects of cultural heritage in the republic belong to different epochs, presenting the doubtless advantage. The image of the Crimean peninsula, as a place with cultural-historical heritage, is brighter, because the Crimea has more surveyed and developed territories of museum level.

The Krasnodar region can be no less interesting from the excursion point of view. The territory of the region has not only preserved

antique monuments, but also early Christian temples and the unique Dolmen culture. Many sights of the region are not so popular, as in the Crimea republic. It is the problem of image-building politics, more concentrated on health-related, beach and childish recreation (<http://www.b-port.com/news/item/79858.html?nomobile=1> 2012).

A comparative analysis of health-related potential of the Crimea republic and the Krasnodar region undoubtedly wins in the volume of tourist attendance, hotel room capacity, infrastructure and number of working resorts, medical facilities. The Crimea republic is attractive by lower prices, wider spectrum and efficiency of natural resources, used for recreation.

3. DISCUSSION AND RESULTS

It is very difficult to count the number of tourists as per occupied beds in the Crimea republic. Crimean Ministry of Resorts and Tourism officially recognizes, that 80% of guests comes as “holiday-makers,” and they find room in private sector, which is non-accountable by the executive authorities. As per the factors of total number of tourists, by the middle of 2000, the Crimea republic reached the level of 1970 - 5-6 million of vacationers, at the maximum, reached in the middle of the 1980 - more than 8 million of vacationers (The Statistical Yearbook AR Crimea, 2013).

As per the data of Crimean Resorts and Tourism Ministry, for the last 20 years, the average length of recreation in the Republic reduced from 20 to 24 days to 10-14 days (<http://www.mtur.rk.gov.ru> 2015). Taking this into consideration, twofold reduction of vacationers in the health resorts, as compared with the middle of 1980 - from 2 million to 1 million - means, that the loading of health-resort sphere reduced fourfold, taking into account the number of overnight accommodation (bed days).

The Black Sea coast of the Krasnodar region in 1990 also experienced a decay. The decay of population income, the destruction of system of trade union package tours and opening of boundaries rained down the tourist flow and distorted its structure in favor of unorganized tourism.

In 1990, the fashionable accommodation facilities began to be built and meet the guests in the resorts of the Black Sea of the Krasnodar region (“Odysseus-Lazarevskoye,” a resort “Sheksna,” “Peak-hotel”). A railway station was opened after reconstruction, the divisions of bypass traffic road of Sochi became operational.

From the beginning of 2000, the annual economic forum “Cuban” began to be held; the development of recreation there is selected as the priority investment direction. A project “The Resorts of the Krasnodar region” has been started; thanks to it, according to the official data, the number of tourists has increased from 5 to 12 million people in the period from 2002 to 2009, and the cumulative investments to the regional economy have increased from 67 to 320 billion rubles. In the period from 2009 to 2013, fixed capital expenditures to the health-resort complex of the Krasnodar region were equal to 83 billion rubles, at that, the scope of services (income) has increased from 48 to 68 billion

Table 1: A comparative characteristic of the Crimea republic and the Krasnodar region per some factors of the tourist-recreational sphere

The Krasnodar region	The Crimea republic
Climate It is divided into two climatic regions: The Northern plain, the Southern highland. The climate of the major part of the Region is moderately continental, and subtropical on the Black Sea coast (Tuapse-Sochi) The average temperature in winter is - -3-5°C, in summer - +22-24°C	It is divided into three climatic regions: The steppe Crimea, the Crimean mountains and the piedmont Crimea, the South coast of the Crimea The average temperature in winter is - -1-2°C, in summer - +22-24°C
Landscape The major part of the region is occupied by the plain (the Northern part - Near Kuban lowland and Azov coast), the rest part is occupied by the mountain area (the Southern part of the region-the Black Sea coast) It faces the Black and Azov Seas	The part of the republic is occupied by the plain (Northern part of the peninsula - Northern-Crimean plain), the part is occupied by the mountain area (the Kerch Peninsula, the Crimean mountains-the Black Sea and Azov coast) It faces the Black and Azov Seas
Health-resort institutions Total number of collective accommodation facilities constitutes 1355 pieces (the biggest quantity in the RF)	Total number of collective accommodation facilities constitutes 363 pieces
Hotel room capacity Hotel room capacity of the region is nearly 104 thousand places	Hotel room capacity of the region is nearly 88 thousand places
Attendance In 2014 nearly 13 million people visited the region	In 2014 nearly 3 million people visited the region
Labor resources The region has enough higher education institutions for the vocational training of future specialists in the sphere of service and tourism: Cuban state university (geographical faculty) Cuban state university of physical culture, sport and tourism (service and tourism faculty) Cuban social and economic institutions (service and tourism faculty) The academy of marketing and social and information technologies (marketing and tourism faculty) Sochi state university (tourism, service and sport faculty)	The republic has some higher educational institutions for the vocational training of future specialists in the sphere of service and tourism: Tavrishesky National University named after Vernadsky (geographical faculty) Sevastopol sea academy (the faculty of transport technologies, tourism and management) Crimean university of culture, arts and tourism (tourism faculty)
Transport availability There are 5 airports (Krasnodar, Sochi, Anapa; Gelendzhik, Yeysk) There are more than 10 railway stations (Krasnodar, Armavir, Anapa, Adler and others) There are 8 sea ports (Novorossiysk, Tuapse, Sochi, Anapa, Gelendzhik, Yeysk, Temryuk, Port-Caucasus)	There are 3 airports (Simferopol; Belbek, Zavodskoye) There are 5 railway stations (Simferopol, Sevastopol, Kerch, Feodosiya, Eupatoria) There are 5 sea ports (Sevastopol, Kerch, Feodosiya, Eupatoria and Yalta)
Communication means etc The mobile phone providers in the region are the following: "MTC," "Beeline," "Magafon," "TELE 2"	The mobile phone providers in the region are the following: "MTC," "K-Telekom"
Investments to the tourism development Cumulative investment to the development of health- resort and tourist spheres of the regional economy for 2013 is nearly 24.3 billion rubles	Cumulative investment to the development of health-resort and tourist spheres of the regional economy for 2014-2017 presupposes 9.4 billion rubles
Tax climate Kuban has a large spectrum of tax reductions, provided for the service and tourism business	Crimea has a FEA. It is staked on the health-resort activity, tourism, logistics (ports and transport) etc

Source: (A Statistical Yearbook AR Crimea, 2013; Plugar, 2014; A Resort-Tourist Complex of the Krasnodar Region 2010-2014, 2015; A Ministry of Resorts and Tourism of the Crimea Republic, 2015; <http://gosstat.crimea.ru> 2015). FEA: Free economic area

rubles (The Krasnodar Region. The Statistical Yearbook, 2014; <http://www.kurortkuban.ru> 2015). The Olympic games in Sochi is the centennial budget of the Crimea. The Black Sea coast has an overwhelming number of tourists, but, mainly, in the peak of tourist season. As to the rest, the infrastructure is used only partially.

The main obstacle to attract the financially reliable tourists to the Crimea and the Krasnodar region is presented in the face of high prices, which do not comply with the service quality.

If to compare the Crimea and the Krasnodar region in the comfort of living, it is possible to say, that, mainly, the tourist infrastructure in the Krasnodar region is modern and updated thanks to great budget inflows to the regional tourism industry. The number of accommodation facilities in the Krasnodar region is twice larger, that in Crimea. Sochi has an obligatory system of hotel classification - it is easier for the tourist, who got used to the qualitative service, to orient and to select (<http://www.mtur.rk.gov.ru> 2015).

The rest in the Krasnodar region costs a little more expensively, than the rest in the Crimea. Price difference is mainly based on the expenses for the roadway, as the package tour to the Crimea costs up to 1,000 conventional units, the Krasnodar region - up to 1,200 conventional units for the rest within the period of standard 10-14 days (The Krasnodar region. The Statistical Yearbook 2014; <http://www.gosstat.crimea.ru> 2015).

Only 10% of tourists go to Crimea using the package tour, the others go themselves. What concerns the Krasnodar region, as per the data of regional Ministry of Resorts and Tourism, the share of vacationers, spending time on Kuban coast on the basis of package tour is larger - nearly the quarter from the total number of tourists.

Recreation cost difference plays an important role in the increase of tourist flow to the Krasnodar region and the increase of number of tourist visits over the Crimea indices. In the opinion of the majority of experts, the Crimea prices of 2014 were exaggerated greatly; together with out-of-date medical base and low level of conform accommodation facilities also influenced on the tourists' decision where to spend their holiday.

The economic sanctions of the Western countries and ruble weakening, in relation to European and American currency, also played a role in the considered process; they promoted the increase of number of vacationers to spend time in the resorts of the Krasnodar region.

The situation with the tourist flow to Crimea is not simple. In 2014, the Crimea passed more than 4 million tourists. In practice, it meant the fall of flow by one third (a year earlier, nearly 6.5 million people had a rest in the Crimea). In 2013 Russians constituted 26% of the vacationers (nearly 1.5 million), the Ukrainian citizens constituted more than 65% (<http://m.expert.ru/south/2014/35/>, 2014). Due to the political and military crisis in the country, the Ukrainian flow to the Crimea fell sharply (by 7-10 times as per some estimates), and the Russian flow has increased. However, it became a poor consolidation for the local resort complex - twice reduction of the flow meant a failure of season of 2014, despite all efforts of Russian government on developing transport connection with the peninsula.

The situation has greatly changed in 2015, when the way to the Crimea has become simpler: The number of flights and floats to the Crimea increased. Despite the fact, that the prices for recreation in the Crimea increased again, as per the experts calculations, by 25% (against 10-20% in the Krasnodar Region), still in the beginning of August, the press office of the Crimean Resorts and Tourism Ministry informed of the increase of tourist number by 16.5%, as compared with the similar period of the previous year. As per 2015 year end, the Crimea shall be visited by 4.5 million people, practically all Russians (<http://regnum.ru/news/1948190.html> 2015).

At the same time, against the background of more frequent refusal of Russians from the foreign trips in favor of domestic tourism, the resorts of the Krasnodar region could not repeat the success of 2014. In 2015, tour operators register the fall of interest to the trips to Anapa and Gelendzhik by 20-50%. The reasons are in the increase of prices in Krasnodar resorts and the increasing popularity and accessibility of Crimea.

Many experts do not consider the occurring changes as the outflow of tourists from the Krasnodar region, explaining such redistribution of tourist flows by the fact, that this year, many tourists, who were unable to visit the Crimea in 2014 due to transport problems, managed to visit it. It means, that the reduction of number of tourist visits to the Krasnodar Region shall be considered as normalization of logistics of tourist flows.

The state considers the tourist sphere as a priority one; it shall be competitive and function socially and economically effective in close interaction of the state and business. At that, it is assumed, that it is necessary to improve the management system in tourist sphere, to increase the quality of tourist services, to promote the domestic tourist product into world and inner tourist markets, and also to increase the population income (Paderin, 2014).

4. CONCLUSION

Geopolitical and geo-economic changes implement definite corrections to the development directions of tourist-recreational complexes of the Krasnodar region and Crimea republic. Both regions are characterized by positive features, although there are some disadvantages, that shall be eliminated.

The Crimea republic has a sufficient number of positive features, among which are the following: Great number of sights, museums, historical-cultural objects; the developed health-resort net; wide opportunities for different types of recreation (diving-centers; the possibilities to organize "green", ethnographic, gastronomic, archeological tourism etc.); the possibilities to travel as per your own routes. The disadvantages involve the following ones: Limited transport opportunities for tourists; out-of-date medical base and low level of health-resort comfort; regime water supply in summer in resort cities; prices, that do not comply with the service level. The ecological situation in the peninsula also becomes complicated, the technogenic loading on environment of industrial Crimean areas becomes more intense (Pershina and Shostak, 2015).

At present, the factors of macro and micro-economics contribute to the increase of tourist flow to the Krasnodar region, and, respectively, the increase of tax liabilities to regional and federal budgets, thanks to which the money for the sphere development and implementation of new projects are provided. The investments from other constituents of the Russian Federation and abroad are actively attracted; at present the region implements nearly 250 large investment projects with total cost of more than 1 trillion rubles.

Due to the fact, that the health-related constituent was historically the primary one in development of Russian domestic tourism in the Krasnodar region, special attention shall be paid to preservation and recovery of natural curative resources of the region. Natural curative resources of the Krasnodar region are so varied and extended, that they create practically unlimited possibilities for development of climatic seaside, mountain, piedmont, flat, steppe) balneo-mud resorts for wide spectrum of diseases. Despite the fact, that the curative constituent in the services, suggested by the regional resorts, constantly increases, the use of natural curative

resources in the health-resort treatment decreases. There is a tendency to replace them by artificial (surrogate) or reformed curative factors using different types of modern foreign equipment. It is necessary to carry out the works on generalization of data about all curative resources of the Krasnodar region in order to create the natural register of natural curative resources (mineral water and curative mud), providing an opportunity to have clear view of possible further development of hydro-mineral base and the use of table and curative-table water for flowing and packaging of therapeutic mud. That is why, to develop the resorts of the Krasnodar region, apart from discovery of new places of natural curative resources, it is necessary to create new approaches to spa and therapeutic mud treatment, to develop new medical technologies, modern methods and methodologies of treatment.

It is necessary to form a new curative resort product, not ignoring the experience of health-resort treatment in Russia, meeting the requirements of world standards, which is taken as an example in all countries. The creation of such product is practically impossible without scientific-research works and marketing studies on its implementation. Concentration and systematization of all data about natural curative resources in one executive authority of the Krasnodar region, the creation and maintenance of regional list of natural curative resources (mineral water and therapeutic mud) of the Krasnodar region would provide an opportunity to create the regional development program of hydro-mineral basis of the Krasnodar region.

General problems of tourist-recreational complex development unite the Krasnodar region and the Crimea:

- Lack of control system over private renters
- Development and adaptation of beach territories
- The necessity to introduce the obligatory classification of accommodation units
- Statistical record in tourism (first of all, the statistics of tourist arrivals and visits).

Both regions will be able to develop effectively the tourist-recreational complex in case of cooperation. It is necessary in short terms to reconstruct the transport system between the Crimea and the Krasnodar region. The integrated tours, which would provide an opportunity to visit the sights of both regions, could become rather successful.

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