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SPATIAL FEATURES OF SECTORAL DEVELOPMENT

Geography of Tourism in the Baltic Region in Changing Geopolitical Conditions

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Abstract—The Baltic macroregion is one of the developed and dynamic (albeit with difficulties typical for 2020–2023) growing tourism regions that attract the attention of researchers. However, as a whole, and, in particular, in comparative geographical terms, it has not been sufficiently studied in depth. The article assesses the territorial features of the level and dynamics of tourism development in this macroregion. To assess the existing differences, the study used comparable data from Rosstat and Eurostat, as well as information from literary sources. An assessment of the level of tourism development and its specific territorial features is given as of 2019, before the onset of the COVID-19 pandemic, which interrupted the dynamic development of tourism infrastructure and the increase in tourist flows in all countries. Baltic macroregion countries, as well as the Baltic regions of Russia, Germany and Poland, were grouped according to the level and dynamics of tourism development. It was revealed that the rich natural and cultural–historical potential of the Baltic territories of Baltic region countries has led to a positive dynamics in the development of tourism infrastructure as a whole and tourist flows, including from domestic tourism. The changes that have taken place in 2020–2021 are briefly characterized.

Keywords: tourism development, tourism geography, tourism potential, regional and sectoral economy, Baltic macroregion, territorial differences, international relations, pre-COVID-19 period

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INTRODUCTION

The Baltic macroregion, which includes countries and regions located on the Baltic Sea coast, belongs to the developed regions of tourism. Domestic tourism is developed here; there is an intensive tourist exchange between neighboring countries; a significant number of foreign tourists come from other parts of the world. Until recently, there have been significant tourist flows between Russia and other countries of the macroregion, and cross-border cooperation has been developing.

In the Russian Federation, tourism, in particular, international tourism, has been growing more actively since the early 1990s, in many ways differently than before. A new direction has emerged in social geography: recreational geography, and the complete title of the science, according to the terminology of the Higher Attestation Commission of the Russian Ministry of Education and Science, is economic, social, political and recreational geography. The number of publications by Russian authors covering various aspects of tourism development in Russia and abroad is increasing. Some attention is paid to development of tourism in the Baltics (Gorochnaya et al., 2021; Ivanov, 2022; Kropinova et al., 2020; Manakov et al., 2019b; Manakov et al., 2020; Sarancha, 2020; Stepanova, 2019a; etc.). The main research centers are St. Petersburg (St. Petersburg State University); Kaliningrad (Immanuel Kant Baltic Federal University), Pskov (Pskov State University); Petrozavodsk (Karelian Branch RAS), Moscow (Moscow State University, Institute of Geography RAS, and Russian State University of Tourism and Service—RSUTS).

The classification of regions by level of tourism development has all but been ignored in publications by Russian and European scientists. In many ways, in our opinion, this is due to the problems of acquiring statistical data, without which it seems quite difficult to make reliable (statistically confirmed) comparisons. A.Yu. Aleksandrova (2016) highlights the following features and problems of tourism statistics: the plurality of research objects (tourists, tourism enterprises, the share of tourism in GRP, etc.); mobility of objects of analysis (in particular, it is problematic to study the internal tourist flows); use of quantitative and non-quantitative data, problems with the methodological apparatus; problems with incomparability of statistical tourism indicators. There are some national data that

Table 1. Dynamics of number of accommodated persons in collective facilities, 2019–2021

Baltic macroregion	Thous. persons				2019 vs. 2011, %	2020 vs. 2019, %	2021 vs. 2019, %
	2011	2019	2020	2021			
RF	4666	9195	5470	7879	197	59.5	85.7
EU	63713	88064	53626	62783	138	50.9	71.3
Total	68379	97259	59096	70662	142	60.8	72.7

Compiled by authors based on data: Number of persons accommodated in collective facilities, EMISS (https://fedstat.ru/indicator/31560?. Accessed March 6, 2023; Number of foreign citizens accommodated in collective facilities, EMISS (https://fedstat.ru/indicator/44042. Accessed March 6, 2023; Arrivals of residents/nonresidents at tourist accommodation establishments (https://ec.europa.eu/eurostat/databrowser/view/tin00174/default/table?lang=en44. Accessed March 6, 2023.

are comparable and used by a number of organizations (UN, WTO, Eurostat, etc.). For example, the UNWTO in the *Survey of International Tourism* annually publishes data on tourist flows and tourism revenues. The 2021 report states that the highest dynamics in tourist flows in 2019 versus 2018 was observed in Poland (7.8%), while Latvia and Russia showed a negative trend (–0.6 and –0.5% respectively).[1] However, according to Rosstat, the demand for hotel services over the same period increased by 6.3% compared to 2018 (Grigoriev et al., 2020). It is no coincidence that, in a fairly common analysis of intraregional features of tourism development, e.g., for Russian regions with tourism specialization and/or a fairly high level of tourism development, interregional differences are analyzed extremely rarely. Intercountry and interregional comparisons are even more difficult.

The objective of this study is to identify geographical differences in the level and dynamics of tourism development in the Baltic macroregion as of 2019; after this year, as in most other regions of the world, the COVID-19 pandemic created vast problems in the tourism sector (in particular, international) and disrupted its dynamic development. The development of tourism in 2020–2021 is briefly characterized by a sharp decline in 2020 and a gradual (and uneven in the context of countries) recovery of previous indicators, which began in 2021.

MATERIALS AND METHODS

The study is based on a critical assessment of Russian and foreign literary sources on this topic and analysis of official statistics on the number of places of accommodation and accommodated tourists based on official 2002–2021 data from Rosstat, Eurostat, national statistical agencies in the Baltic region of EU countries, and World Tourism Organization Quantitative data were processed by well-known economic and statistical methods using time series, averages, grouping, and graph analytics. The types of countries differing in level and dynamics of tourism development are identified.

Based on the determination of the leading countries in terms of inbound tourism in states of the Baltic macroregion and parts thereof in the Baltics, the role of the mutual tourist exchange within the macroregion is assessed as of 2021.

In the world literature, tourist regions of various levels are distinguished (Fedorov, 2020; Kropinova, 2020a; etc). The macrolevel includes territories consisting of countries or large administrative units thereof. In this context, the Baltic region is considered a macrolevel tourism region and includes Sweden, Finland, Estonia, Latvia, and Lithuania as whole states; for Germany and Poland, the Baltic macroregion includes only administrative units of the NUTS-2 level with access to the sea. Russian federal subjects include St. Petersburg; Leningrad and Kaliningrad oblasts on the sea coast; the Republic of Karelia; and Pskov and Novgorod oblasts, which are closely connected with St. Petersburg by tourist relations.

Until 2019, the number of people accommodated in collective facilities in the Baltic macroregion increased (in particular, in federal subjects), but in 2020, in the context of the COVID-19 pandemic, it sharply decreased (Table 1). Growth in 2021 far from fully compensated the decline (in Russian regions to a greater extent, but still, the number of people accommodated in collective facilities was only 85.5% of the 2019 level). Since changes in the tourist flows' scale after 2019 have experienced an extremely negative (and, we hope, temporary) influence, this article assesses the geography of tourism in the Baltics as of 2019, which to a greater extent reflects the potential for its development compared to the subsequent period.

To identify territorial differences in the level of tourism development, we used Rosstat and Eurostat data on the number of places in accommodation establishments and the number of accommodated persons, including citizens from host countries and foreigners as of 2019, before the deformation of tourist flows that began in 2020 due to the COVID-19 pandemic. Based on expert assessments in the media (including the Internet), the authors present a forecast of possible directions for tourism development in the

[1] World Tourism Organization. International Tourism Highlights, 2020, 2021, Edition, UNWTO, Madrid, https://doi.org/10.18111/9789284422456.

Table 2. Regions generating main tourist flows in Baltics, 2018

Region of inbound tourism	Leaders in inbound tourism		
	first place	second place	third place
Sweden*	*Norway*	Germany	Denmark
Denmark*	Germany	*Norway*	Sweden
Finland*	**Russia**	Sweden	Estonia
Estonia*	Finland	**Russia**	Latvia
Germany (Baltic region)*	Denmark	Sweden	*Switzerland*
Lithuania*	*Belarus*	Latvia	**Russia**
Latvia*	Lithuania	Germany	**Russia**
Poland (Baltic region)*	Germany	Sweden	**Russia**
Russia**	*China*	Belarus	Germany
Baltic region of Russia***	*China*	Germany	Finland

Countries not pertaining to the Baltic macroregion are italicized.
Compiled by authors based on data: * State of the Tourism Industry in the Baltic Sea Region, Stralsund, 2019; ** Rosstat data archive for 2018 Number of Foreign Citizens Accommodated in Collective Facilities of Russian Federation by Country of Citizenship (sheet 7.1.); *** Rosstat data archive for 2018 Number of Foreign Citizens Accommodated by Country of Citizenship in Collective Facilities in Northwestern Federal District.

regions under consideration, taking into account the current geopolitical situation.

TOURISM STUDIES IN THE BALTIC REGION

The growth of tourism demand in the Baltic Sea region, associated with the changing role of borders, extensive cooperation, and advanced regional integration, make the area interesting for studying processes involved in the formation of the cross-border seacoast tourism space (Cerić, 2019). Since the beginning of the 2010s, Russian scientists began studying the level, structure, and dynamics of tourism development in the Northwestern border regions and the formation of border tourist routes with the participation of Russia (Kropinova, 2017, 2020a; Lachininskii and Semenova, 2015; Sebentsov et al., 2017; Zaitseva et al., 2016); researchers of the Karelian Research Center RAS have been studying Russian–Finnish borderlands (Stepanova, 2019a, 2019b, 2019c). Scientists of Pskov State University describe the formation of Russian–Estonian and Russian–Latvian cross-border tourist regions (Manakov and Golomidova, 2018; Manakov et al., 2019a; Manakov et al., 2019b; Manakov et al., 2021). The authors of these studies pay particular attention to the issues of cultural and recreational geography. Researchers from Moscow have covered issues related to Kaliningrad oblast's cross-border cooperation in the field of tourism. Sebentsov et al. (2016) examine in detail aspects of local border traffic and assess the dynamics and structure of tourist flows from 1991 to 2014. Lithuanian researchers have been studying Russian (Kaliningrad oblast)–Lithuanian borderlands (Spiriajevas, 2019). Polish and Russian researchers have studied the Russian–Polish borderlands (Palmowski and Fedorov, 2020; Studzieniecki et al., 2016; Studzińska, 2019; Studzińska et al., 2018). Border tourism plays a peculiar role in the economic development of the territories. Stoffelen et al. (2018) and Timothy (2001) touch on general issues of tourism and borders. Więckowski and Saarinen (2019) consider the processes of tourism-related cross-border region formation in Europe as a whole. A number of authors consider the formation of tourist flows in the Baltic region with the participation of Kaliningrad oblast (Dragileva, 2006; Dragileva and Lipatrova, 2016; Korneevets et al., 2015; Stepanova, 2019a; Studzieniecki et al., 2016). The development of the tourist–recreational complex, including cross-border tourism, is given considerable attention in the strategies of Russia's Northwestern Federal District and its constituent region in the documents of such intergovernmental organizations as the Council of Baltic Sea States (Kolosov and Van Well, 2016). Tourism is designated as one of the priorities of the EU Strategy for the Baltic Sea Region (EUSBSR), which pays particular attention to sustainable tourism development (Kropinova, 2020b).

Despite the existing similarity in the tourism–recreational potential of the Baltic Sea regions, it is characterized by a wide interchange of tourist flows (Table 2).

However, it should be noted that for the larger countries of the Baltic region as a whole, the geography of tourist arrivals as of 2018 was somewhat different compared to their coastal regions. For example, for all of Germany, the main countries generating tourists were the Netherlands, Switzerland, and the United

States;[2] and for the two Baltic states of Germany, Denmark, Sweden, and Switzerland (Table 1).

The countries of the Baltic region are the main sources of tourist flows within the region. Of the 27 leading regions in the formation of tourist flows in the Baltic, only 5 belong to states that do not have direct access to the Baltic coast; of these five, only China does not border states of the Baltic region. China's first place in the formation of tourist flows to the Russian part of the Baltic is associated with St. Petersburg's popularity in the Chinese tourism market. However, as of 2019, this distribution was not typical of other subjects of the Northwestern Federal District (NWFD). For example, this distribution for Kaliningrad oblast in 2019 was represented by tourists from Germany, 25 868 people (first place); Lithuania, 16 495 people (second place); and Latvia, 10 957 people (third place). In addition, tourists from China also showed interest in Kaliningrad oblast, sixth place, after Poland (fourth place), and Belarus (fifth place).[3]

Until 2019, Russia played an important role in the formation of tourist flows in the Baltic, occupying a leading position in five of the eight countries in the region. This situation with the formation of mutual tourist flows within the Baltic region was primarily associated with the development of cross-border cooperation, in which the tourism, trade, and transport sectors played a leading role before the pandemic.

Earlier, E.G. Kropinova (2020a) identified eight cross-border tourism regions in the Baltic macroregion that had developed by 2020 and are the core of its formation and locomotives tourism development in the Baltic: Pomeranian (German–Polish); Öresund (Danish–Swedish–German); Pasvik–Inari (Russian–Finnish–Norwegian), Russian–Finnish (Northern); Russian–Finnish (southern); Finnish–Estonian; Latvian–Estonian–Russian; and Gulf Zone (Polish–Russian–Lithuanian). The most developed is the Danish–Swedish–German region, located on both sides of the Danish straits. There are also significant tourist and recreational links within the Finnish–Estonian region (owing to the shopping tour–oriented ferry service). At the initial stages of formation are the Russian–Finnish northern and Russian–Finnish–Norwegian regions, the formation of which has stopped. There is significant potential for further development in the border regions of the German–Polish Pomerania and, with a hypothetical change in the current geopolitical situation in the Baltics, the Polish–Lithuanian–Russian Gulf Zone.

Country and regional differences are expressed in the level of development of tourism infrastructure and the geography of tourist flows, which became the subject of our study, the results of which are presented in the next section.

COMPARATIVE ANALYSIS OF THE LEVEL OF TOURISM DEVELOPMENT IN DIFFERENT PARTS OF THE BALTIC MACROREGION

Tourism as an economic activity in the Soviet Union was much less developed than in economically developed foreign countries. At the beginning of 1989, there were only 8.9 places per 1000 inhabitants in sanatoria and vacation resorts per 1000 inhabitants in the Soviet Union, and only 8.8 in the Russian Federation.[4] In foreign Europe in 1985, the figure was twice as high: 17.9. The Baltic republics also performed better than the national average. In Estonia, there were 12.1 places of accommodation per 1000 inhabitants; in Lithuania, 19.4; in Latvia, 23.6. However, their level was lower than, e.g., in Germany (26.6 in 1987) and, to an even greater extent, in the state of Schleswig-Holstein (47).[5]

The Soviet specifics in organizing recreation, in contrast to Western practice, was the existence of plant and vegetable (dacha) plots with residential buildings, where is possible to live in summer and often in winter. This nonmarket approach (which does not ensure profits to the owners of dachas) largely compensates for the lag in development of collective accommodation establishments (cure- and spa-centers, hotels, campsites, etc.), in which tourists live in market conditions.

The increase in household income, which has become a factor in the rapid growth in demand for tourism services, has led to an intensive increase in the number of places in accommodation establishments per 1000 inhabitants by 2019 to 17 in Russia and 64 in EU countries (Table 3). Among the states of the Baltic macroregion, the leaders are Scandinavian countries: Sweden (80.5 places) and Denmark (70.5 places). For two German states on the Baltic coast, Mecklenburg-Vorpommern (197 places) and Schleswig-Holstein (106 places), the indicators are even higher. Of the countries located in the Baltics with a traditional market economy, Finland has a reduced number of accommodation establishments. Its level (largely due to demand from Finnish tourists) was reached by Estonia, surpassing the other two Baltic states in this indicator—Lithuania and, in particular, Latvia (which

[2] Statista. Arrivals at Tourist Accommodation Establishments. 2019. https://appsso.eurostat.ec.europa.eu/nui/show.do?dataset=tour_occ_arnat&lang=en. Accessed June 20, 2022.

[3] On the Activities of Collective General-Purpose Accommodation Establishments (Hotels and Similar Accommodation establishments) in 2019, Federal State Statistics Service (Rosstat). Territorial Body of the Federal State Statistics Service for Kaliningrad oblast, Kaliningrad, 2020.

[4] National Economy of the USSR in 1989; Moscow: Finance and Statistics, 1989.

[5] Calculated by the authors from data: A.Yu. Aleksandrova, International Tourism, Moscow, 2002; http://www.anl.az/el_ru/a/aa_mt.pdf. Accessed March 9, 2023; Territory and population of countries of the world, National Economy of the USSR over 70 years (https://istmat.org/node/93264. Accessed March 9, 2023).

Table 3. Capacity of accommodation establishments, 2019

Country, region	Number of places, 2019	Places per 1000 people, 2019	Places in 2019 vs. 2011, %
Russia, including:	2495687	17.0	203
St. Petersburg	105034	19.5	199
Leningrad oblast	45317	24.3	125
Kaliningrad oblast	16982	16.9	207
Republic of Karelia	10661	17.3	168
Pskov oblast	10887	17.3	162
Novgorod oblast	9176	15.3	124
Total 6 Russian federal subjects	198057	19.6	197
European Union	32889658	64.1	116
Germany, including:	3594701	43.3	108
Mecklenburg-Vorpommern	317167	197.0	113
Schleswig-Holstein	308713	106.6	126
Total 2 federal states of Germany	625880	138.9	119
Poland, including:	825522	21.7	136
West Pomeranian Voivodship	145414	86.8	136
Pomeranian Voivodship	119521	51.9	153
Warmian-Masurian Voivodship	42998	30.6	114
Total 3 voivodships of Poland	307933	57.2	138
Sweden	823331	80.5	104
Denmark	436011	75.1	107
Finland	257041	46.6	117
Lithuania	108488	38.8	288
Latvia	55800	29.1	156
Estonia	60957	46.0	118

Compiled by authors from data: Regions of Russia. Socioeconomic Indicators. Moscow: Rosstat, 2021; Number of Places in Collective Accommodation Establishments; EMISS (https://fedstat.ru/indicator/31583. Accessed March 6, 2023); Number of Establishments and Beds (https://ec.europa.eu/eurostat/databrowser/view/tin00181/default/table?lang=en. Accessed March 6, 2023); Population on 1 January (https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en. Accessed March 6, 2023).

in the Soviet period surpassed the other two Baltic republics in tourism development). Even lower (but slightly higher than in Russia) is Poland, but three voivodships located on the Baltic have indicators of accommodation establishments above the national average, and the West Pomeranian Voivodship bordering Germany (where a large number of tourists come from) is even higher than the average indicator for Sweden.

Of the federal subjects under consideration, Leningrad oblast has the highest indicator (24.3 places). This indicator is higher than the average for the Russian Federation in the Republic of Karelia, St. Petersburg and Pskov oblasts; it is slightly lower in Kaliningrad. The lowest indicator is in Novgorod oblast: here the proximity to St. Petersburg, from which it is convenient to make one-day tourist trips to Veliky Novgorod, famous for its historical sights, is a factor.

Comparative assessment of the dynamics of the number of accommodation establishments in 2011–2019 shows a tendency towards a certain leveling of this indicator (the linear correlation coefficient between its level and dynamics is –0.51). Thus, in the six considered Russian regions, the increase was 97%; in two German regions, only 19%; in three Polish regions, 38%; in the three Nordic countries, 5–17%. In Estonia, which stands out among the Baltic countries in the provision of accommodation establishments, the increase was only 18%; in Latvia, 56%; and in Lithuania, this figure almost tripled (see Table 2).

Assessing the development of tourism in the federal subjects in the Baltic macroregion, we should mention the high rates of construction of new hotel enterprises (in particular, due to the commissioning of a large number of hostels) and sharp increase in tourist demand in the 2010s. The pace of development was particularly strong in St. Petersburg and Kaliningrad oblast, where the number of accommodation establishments more than doubled. Significant growth was

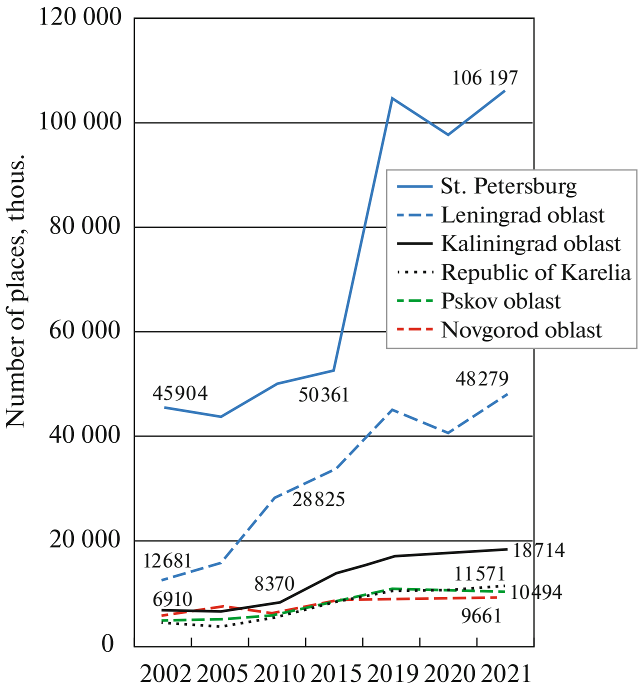

Fig. 1. Dynamics of number of places in collective accommodation establishments in Russian federal subjects in Baltic region, 2002–2021. *Compiled* by authors from data: Number of Places in Collective Accommodation Establishments (units, value of indicator for year), EMISS. (https://fedstat.ru/indicator/31583. Accessed March 5, 2023).

also typical for other regions under consideration, in particular for the Republic of Karelia and Leningrad oblast (Fig. 1). The successful development of the material base of tourism in the Russian Northwest is largely due to the presence of unique places of interest (out of 24 Russian UNESCO World Heritage Sites, 8 are located in the NWFD) (Rizzi, 2012), which triggered an increase in tourist flow to this region, the weak development of the tourist infrastructure until the 2000s (i.e., the starting point was at a low level, reflected in the growth dynamics), an increase in the flow of investments in fixed capital aimed at the development of collective accommodation establishments,[6] and infrastructure projects implemented from 2010 to 2018 (including those related to a number of international events).

The provision of accommodation establishments (Table 4) naturally correlates with the number of accommodated persons per 1000 inhabitants, although there is no complete coincidence in the ranking of countries and regions in these two indicators. This is due to both the occupancy of hotels and average duration tourists stay in them. Of the three countries and regions presented in Table 3, as well as in terms of availability of accommodation establishments (see Table 2), the leader is the German state of Mecklenburg-Vorpommern, largely because Berlin residents vacation here. Of the states of the Baltic macroregion, Sweden stands out, with 76.5% being foreign tourists (mainly from neighboring Norway, Germany, Denmark, as well as the UK (Manakov et al., 2021). More than half of foreign tourists are in Estonia, where most are participants on short-term weekend itineraries (foreigners constitute 59.5% of all tourists, mainly from Finland, as well as Russia, Latvia, and Germany (Manakov et al., 2019)). In Latvia, 68% are foreign tourists (mainly from neighboring Lithuania and Estonia, as well as from Finland and Germany), who also stay in the country only 2–3 days.[7] In the other considered federal subjects, domestic tourists predominate. Of the Russian regions, the largest share of foreigners (37%) is tourists in St. Petersburg; their share is significant in Kaliningrad (15%).

RESULTS AND DISCUSSION

No evidence is needed for fact that in the states of the Baltic macroregion with a traditional market economy, the level of tourism development is higher than in the post-Soviet countries and postsocialist Poland, where the level of socioeconomic development and household incomes is lower, and, as a result, the tourism infrastructure and opportunities for the population to pay for tourist services are not as great. Ranking based on tourism development of the first group of countries by relative indicators of the capacity of collective accommodation establishments is as follows (in descending order): Sweden–Denmark–Finland–Germany; in the number of persons accommodated per 1000 inhabitants: Sweden–Finland–Germany–Denmark. The second group with lower indicators is headed by Estonia, which leads in both indicators (which can even be attributed to the first group of countries—which we did in Table 5). It also includes Lithuania, with a larger capacity of collective accommodation establishments per 1000 inhabitants, and Latvia, which has more persons accommodated per 1000 inhabitants. Poland and Russia have lower indicators.

It should be noted that in (Aleksandrova, 2016, p. 16), Russia and Poland are also attributed to the same type of states based on the peculiarities of tourism development: "The tourism system in a stage of transformation and formation of a civilized tourism market. Semiperiphery of the world tourism space. Germany's tourism system is one of the most developed, characterized as "a mature national interna-

[6] State Report on the State and Development of Tourism in the Russian Federation in 2014, Moscow: Ministry of Culture of the Russian Federation, 2015, pp. 78–79.

[7] https://lv.sputniknews.ru/20220923/turisty-v-latviyu-chasche-vsego-priezzhayut-iz-sosednikh-stran-i-vsego-na-paru-nochey-22848878.html. Accessed March 9, 2023.

Table 4. Number of persons accommodated in collective accommodation establishments

Country/region	Accommodated persons, 2019: per 1000 persons			Accommodated persons, 2019: % of total		Change of accommodated persons' number, 2019 vs. 2011, %
	citizens of country of arrival	foreign citizens	total	citizens of destination country	foreign citizens	
Russia, including:	444	74	518	85.7	14.3	203
St. Petersburg	711	421	1132	62.8	37.2	220
Leningrad oblast	571	58	629	90.7	9.3	165
Republic of Karelia	706	77	784	90.2	9.8	311
Kaliningrad oblast	552	98	651	84.9	15.1	143
Pskov oblast	618	62	680	90.8	9.2	135
Novgorod oblast	511	81	592	86.3	13.7	110
Total 6 Russian federal subjects	652	259	910	71.6	28.4	197
European Union	1332	891	2223	59.9	40.1	132
Germany, including:	1755	475	2230	78.7	21.3	128
Mecklenburg-Vorpommern	4845	244	5089	95.2	4.8	123
Schleswig-Holstein	2679	345	3024	88.6	11.4	147
Total 2 federal states of Germany	3453	309	3762	91.8	8.2	134
Poland, including:	743	197	939	79.1	20.9	165
West Pomeranian Voivodship	1402	515	1917	73.1	26.9	161
Pomeranian Voivodship	1138	267	1405	81.0	19.0	190
Warmian-Masurian Voivodship	863	117	981	88.0	12.0	150
Total 3 voivodships of Poland	1148	305	1454	79.0	21.0	170
Sweden	713	2324	3037	23.5	76.5	130
Denmark	894	532	1426	62.7	37.3	129
Finland	1656	596	2252	73.5	26.5	113
Lithuania	751	694	1445	52.0	48.0	331
Latvia	473	1014	1486	31.8	68.2	174
Estonia	1160	1701	2861	40.5	59.5	167

Compiled by authors from data: Regions of Russia. Socioeconomic Indicators, Moscow: Rosstat, 2021; Number of Accommodated Persons in Collective Accommodation Establishments, EMISS (https://fedstat.ru/indicator/31560. Accessed March 6, 2023); Number of Foreign Citizens Accommodated in Collective Accommodation Establishments, EMISS (https://fedstat.ru/indicator/44042. Accessed March 6, 2023); Arrivals of Residents/Nonresidents at Tourist Accommodation Establishments (https://ec.europa.eu/eurostat/databrowser/view/tin00174/default/table?lang=en. Accessed March 6, 2023); Population on 1 January (https://ec.europa.eu/eurostat/databrowser/view/tps00001/default/table?lang=en. Accessed March 6, 2023).

tional tourism system, with comprehensive tourism specialization." However, A.Yu. Aleksandrova did not consider other countries of the Baltic macroregion.

Based on the two indicators above, the ratio of accommodated persons of the country of destination and foreign citizens, as well as the dynamics of the number of accommodated persons in 2011–2019 (see data in Tables 2–4; Figs. 1, 2), the following groups of countries have been identified, quantitatively and qualitatively differing in the level, dynamics of tourism development, and the ratio of domestic and foreign tourists (Table 5).

The ongoing leveling of quantitative indicators of tourism development is clearly visible. Groups 1 and 2 with a high level of relative (per 1000 inhabitants) indicators of the capacity of collective accommodation establishments and number of accommodated persons have lower growth rates in the number of tourists. Countries of groups 3 and 4 have higher growth rates, varying by country from medium to very high.

The geographical features of tourism are manifested more distinctly when the parts of Russia, Germany, and Poland directly located in the Baltic macroregion are considered (Table 6). The regions of countries belonging to the Baltic macroregion have, as

Table 5. Some indicators of tourism development in countries of Baltic macroregion, 2019

Country of Baltic macroregion	Indicator			
	A	B	C	D
1. Very high level, low growth rates; very large number of foreign tourists				
Sweden	1	3	1	4
Denmark	1	3	1	4
2. High level, low growth rates; large number of foreign tourists				
Germany	2	1	2	4
Finland	2	1	2	4
average growth rates, very large number of foreign tourists				
Estonia	2	2	1	3
3. Average level, high growth rates; very large number of foreign tourists				
Lithuania	3	3	1	1
average growth rates, very large number of foreign tourists				
Latvia	3	4	1	3
4. Low level of development average growth rates; large number of foreign tourists				
Poland	4	3	2	3
high growth rates; small number of foreign tourists				
Russia	4	4	4	2

Note. A, number of places in collective accommodation establishments per 1000 inhabitants, 2019; B, number of citizens of destination country per 1000 inhabitants, 2019; C, number of foreigners per 1000 inhabitants, 2019; D, number of accommodated persons, 2019 to 2011, %; level of indicator: 1, very high; 2, high; 3, medium; 4, low.

a rule, higher relative indicators of the capacity of collective accommodation establishments and the number of accommodated persons compared to the average for the respective country. Novgorod oblast is an exception, where the first of the two indicators is below the Russian average. St. Petersburg has the highest indicators among the six federal subjects in the Baltic region; Leningrad oblast somewhat lags behind it. In tourism development, none of the Russian regions under consideration, in contrast to the German state of Mecklenburg-Vorpommern and the Polish Warmian-Masurian Voivodship, has low growth rates: only average (Leningrad, Novgorod, and Pskov oblasts), high (Kaliningrad oblast), and very high (St. Petersburg and Republic of Karelia).

Federal subjects demonstrated in 2020–2021 greater resilience to negative externalities compared to most other parts of the Baltic macroregion. Their development compared to the average for the foreign part of the macroregion in 2011–2019 was more dynamic; the decline in 2020 was not as significant, and the recovery in 2021 was more successful, which reflects the dynamics of the number of accommodated persons (Fig. 2). This allows us to hope that in the near future the 2019 level will not only be restored, but also surpassed, mainly due to the development of domestic tourism.

In turn, it is difficult to expect a significant positive dynamics of tourism development in foreign countries of the Baltic macroregion. Interim statistical reviews furnish data that in 2022, the financial condition of EU citizens significantly deteriorated. Thus, according to data from the German statistics office Destatis and Eurostat, the average increase in food prices in EU countries was 8.9% (as of May 2022). The highest growth was observed in Lithuania with 22.1% (first place) and Latvia with 17.7% (third place). The indicators were also significant in Estonia (more than 14%). In Germany, the figure is close to the average, 8.5%.[8] This is most significant for the former Baltic states, since food accounts for about a quarter of all expenditures; therefore, an increase in it will reduce the share of other types of expenditures and most likely this will affect spending on recreation and tourism. Neither should we forget the significant increase in the cost of utilities associated with rising energy prices.

Currently, it is difficult to forecast the dynamics of tourism development. In conditions of the unstable

[8] The Baltics have fallen victim to antirussian sanctions), May 31, 2022. https://vz.ru/economy/2022/5/31/1160704.html.

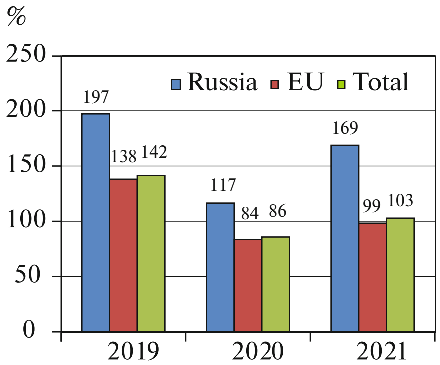

Fig. 2. Dynamics of number of accommodated persons, Baltic macroregion, year to 2011, %. *Compiled* by authors from data: Number of Accommodated Persons in Collective Accommodation Establishments, EMISS (https://fedstat.ru/indicator/31560. Accessed March 6, 2023); Number of Foreign Citizens Accommodated in Collective Accommodation Establishments, EMISS (https://fedstat.ru/indicator/44042. Accessed March 6, 2023); Arrivals of Residents/Nonresidents at Tourist Accommodation Establishments (https://ec.europa.eu/eurostat/databrowser/view/tin00174/default/table?lang=en. Accessed March 6, 2023).

geopolitical situation and ongoing fears of COVID-19 infection, the share of people who took no tourist trips is increasing. According to Statista Logo, in 2020 in Germany (leading among the countries of the Baltic region in tourism), 34% of respondents did not take tourist trips or provide information; in 2022, this was 53%. If the trend, identified in 2020–2022, of a change in the geography of tourist trips continues, then for the next few years it will be possible to predict the growth of foreign tourism. Thus, in Germany, the share of domestic tourism has decreased over three years from 41 to 31% (including holidays on the Baltic coast from 10.1 to 8.6%; in the adjacent Mecklenburg Lake District, from 2.4 to 2.1%). The share of foreign countries in the Baltic region also decreased, while Mediterranean countries remained the predominant destinations.[9]

Travel Data Analytics (TDA) surveys conducted for the German Travel Association (DRV) show that about 40% of total booking revenue in summer 2023 will come from Eastern Mediterranean destinations, primarily cheaper tours in Turkey, Greece, and Egypt. Speakers at Europe's largest tourism exhibition ITB (Berlin), although making allowances for the unstable geopolitical situation, promised to exceed the figures for 2022 in terms of tourist flow (meaning that in 2022, the record of pre-COVID 2019 had not yet been exceeded). For the 2023 May holidays, 65% of German bookings have also been made in Mediterranean countries (primarily Spain, Turkey, and Greece).[10]

Forecasts for Russia for the May holidays of 2023 show that at least two federal subjects of the NWFD will enter the top ten in terms of tourist arrivals: St. Petersburg (the absolute leader, with an increase in popularity by more than three times compared to 2021) and Kaliningrad oblast.[11] The authors also believe that, with the retention of existing hostility on the part of Western states, and, as a result, restrictions on foreign travel for Russians, domestic tourism in all Russian subjects in the Baltic region will continue on a positive trend. In addition, if we talk about foreign tourism, negotiations are already underway with Chinese tour operators to receive Chinese tourists and new destinations are being formed.[12] This gives grounds to suggest that China will not only continue to play a significant role as a generator of tourist flows in the Russian Baltic, but its importance may also increase.

CONCLUSIONS

The countries and regions of the Baltic macroregion generally have a high, albeit differing, level of socioeconomic development, similar, but still unequal and often unique natural and climatic conditions, and a rich cultural and historical heritage, including that associated with the region's common history. This has led to the rapid development of both domestic and foreign tourism in the macroregion in the second half of the 20th and beginning of the 21st centuries. Domestic tourism is more developed in countries with traditional market economies (Sweden, Denmark, Germany, and Finland). However, these countries also have also large interregional differences in the level of tourism development (e.g., in the more backward socioeconomically Warmian-Masurian Voivodship of Poland, it is much less developed than in the other two voivodships located on the Baltic). Tourism is less developed, but is growing faster in the post-Soviet Baltic countries and postsocialist Poland (moreover, in Estonia, its relative indicators have reached the level of the first group of countries). St. Petersburg stands out

[9] Statista. Leading vacation destinations for German tourists 2020–2022, Published by Statista Research Department, March 17, 2023. https://www.statista.com/statistics/557974/vacation-destinations-german-tourists/#:~:text=Leading%20vacation%20desstinations%20for%20German%20tourists%202020%2D2022&text=The%20most%20popular%20vnsacation%20destinations,Bavaria%20and%20the%20North%20Sea.

[10] DRV: Greece among Top Summer 2023 Travel Destinations for Germans, GTP Headlines, March 7, 2023. https://news.gtp.gr/2023/03/07/drv-greece-among-top-summer-2023-travel-destinations-for-germans/#:~:text=The%20top%20five%20summer%202023,(DRV)%2C%20Norbert%20Fiebig.

[11] Kaliningrad entered the top ten cities popular with tourists for trips during the May holidays, News mail.ru, March 27, 2023, https://news.mail.ru/society/55578203/?frommail=1.

[12] Director of Curonian Spit National Park: We were promised up to 30000 Chinese tourists per month, New Kaliningrad. Informational portal. March 28, 2023, https://www.newkaliningrad.ru/news/briefs/community/24039043-direktor-natsparka-kurshskaya-kosa-nam-poobeshchali-do-30-tys-kitayskikh-turistov-v-mesyats.html.

Table 6. Some indicators of tourism development in Baltic regions of countries of Baltic macroregion, 2019

Region of Baltic macroregion countries	Indicator			
	A	B	C	D
1. Very high, low, or slow growth; average number of foreign tourists				
Mecklenburg-Vorpommern	1	1	3	4
Schleswig-Holstein	1	1	3	3
2. High level, high or medium growth rates; average number of foreign tourists				
West Pomeranian Voivodship	2	2	3	3
Pomeranian Voivodship	2	2	3	2
3. Average level				
high growth rates; average number of foreign tourists				
St. Petersburg	3	3	3	1
average growth rates, small number of foreign tourists				
Leningrad oblast	3	3	4	3
low growth, small number of foreign tourists				
Warmian-Masurian Voivodship	3	3	4	4
4. Low level; small number of foreign tourists				
very high growth rates				
Republic of Karelia	4	3	4	1
high growth rates				
Kaliningrad oblast	4	3	4	2
average growth rates				
Pskov oblast	4	3	4	3
Novgorod oblast	4	3	4	3

Note. A, number of places in collective accommodation establishments per 1000 inhabitants, 2019; B, number of citizens of destination country per 1000 inhabitants, 2019; C, number of foreigners per 1000 inhabitants, 2019; D, number of accommodated persons, 2019 to 2011, %; level of indicator: 1, very high; 2, high; 3, medium; 4, low.

among Russian regions in tourism development, where the number of accommodated persons per 1000 inhabitants exceeds the average for Poland, and out of its three Baltic regions, it exceeds the level of the Warmian-Masurian Voivodship. On the whole, the lower relative indicators of tourism development (with an increased rate of its development) in Russian regions, from the standpoint of organizing active recreation for the population, are partly compensated by the developed *dacha* economy.

The lag in development of the hotel sector of tourism infrastructure, which is characteristic of Russian regions, should also be noted. The number of places of accommodation acts in many respects as a limiter for another indicator of the level of tourism development: the number of tourists. The seasonality of hotel occupancy associated with weather and climatic conditions in conditions of insufficiently developed tourist infrastructure is also of significant importance. It is no coincidence that the leaders of the Russian tourism industry are trying to develop event and congress tourism, which makes it possible to ensure occupancy of the number of rooms in the off season. Increasing attention is paid to medical and health tourism.

We can mention one more conclusion on tourism development in Russia following from the study. As the situation with the spread of COVID-19 has shown, factors favorable in one case may be restrictive in another. Thus, the significant predominance of Russian tourists in domestic tourism became a positive factor for the Russian tourism industry during the pandemic, when foreign tourism decreased almost to zero due to differences in vaccine requirements. It was the orientation towards the local market that allowed the business to somewhat level out the “failure” of the tourist season in 2020 and, to a lesser extent, 2021, compared to 2019: the decrease in tourists in Russian regions was less compared to their decrease in “Western” part of the Baltic macroregion (see Fig. 2). Measures to support domestic tourism were put in place by the Russian Federation Government, which introduced a tourist cashback program that promised a return of up to 20% of the cost of a trip paid with a Mir card. According to the forecast of the Ministry of Economic Development, more than 61 million trips are expected within Russia in 2022, which is 7% greater than in 2021 (57 mln trips).

CONFLICT OF INTEREST

The authors declare that they have no conflicts of interest.

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