

INBOUND TOURIST FLOW DIRECTIONS TO DETERMINE THE TARGET MARKETS FOR PROMOTING TOURIST DESTINATIONS

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Abstract: Current trends in the development of international tourism and the policy of states in this sector are of great interest to potential consumers of tourist services, tourism entities, scientists dealing with economics, as well as government agencies in different countries engaged in tourism regulation and development. Since the international tourism industry is one of the most important economic sectors, it affects the economic, cultural, and social development of regions and countries around the world. The development of inbound tourism is currently one of the priorities of the state policy in the tourism industry. It is well known that in many countries worldwide, inbound tourism extensively contributes to the treasury and the state image. It is one of the most important categories of exports, and often is the main source of foreign exchange earnings. Russia has everything necessary for the development of the tourism industry, namely, natural environment, historical, cultural, and material resources. The relevance of this problem predetermines the great interest in this issue on the part of scientists and practitioners. However, today there is no effective mechanism for managing inbound tourism by planning and organizing events aimed at promoting tourist destinations. The article defines at the theoretical level the prospects for the development of inbound tourism, the factors influencing the development of inbound tourism, and the criteria for selecting target markets for inbound tourism. Based on data of United Nations World Tourism Organization (UNWTO), the article presents the top 10 countries in terms of spending on outbound tourism; based on data of Department of Statistics and Data Management of the Bank of Russia, defines the top 7 countries by the average level of expenditure for tourism purposes in the Russian Federation; based on the data of Federal State Statistics Service (Rosstat), determines the number of inbound tourist trips for foreign citizens in Russia. In consequence of the analysis of the obtained data, the process of choosing a destination as a key aspect of the consumer behavior of a foreign tourist is presented.

Keywords: tourism, export, tourism industry, economy.

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Introduction

The development of inbound tourism is one of the critical problems of creating a base for sustainable economic growth and increasing effectively the proportion of nonresource-based exports in the total export turnover of the Russian Federation. Tourism provides an inflow of funds to the country's economy and has a powerful synergistic effect. Tourism promotes an increase in the income of 53 sectors of the national economy that are involved in the creation of tourist products, is a multiplier of employment and self-employment, promotes the development and involvement of small and medium-sized businesses in export activities, improves the living conditions of the population at the local level, and smoothes the disparities of territorial development. According to the United Nations World Tourism Organization (UNWTO), Russia is one of the ten countries most frequently visited by tourists (Artal-Tur et al., 2015). In general, foreign experience indicates a great benefit from inbound tourism; therefore, each state resorts to many activities and develops a tourism policy. The proportion of inbound tourism in the global gross national product is almost 10%, as well as 15% of global investment, and 11% of all tax collections [9].

According to the researchers, the promotion of inbound tourism results from the interaction of internal and external socio-economic processes that create the need for travel and the demand for tourist services. The demand for tourist services includes internal and international tourism which is generated both within the country and abroad, while it is implemented based on the offers that are created on the market by the tourist market entities [10]. Impact factors influencing the development of inbound tourism include a favorable natural environment, as well as a rich historical and cultural heritage [11]. Also, to develop any type of tourism, not only inbound, it is necessary to have an appropriate legal framework that would meet the conditions of contemporary society and the activity of business entities. In other words, a tourist sector needs a high-quality legal framework for the development of the social and economic aspects of tourism [12]. Since inbound tourism is closely linked to international activities, according to researchers, the political situation in the country is of particular importance. This is manifested through the stability and openness of policy, stimulation of national and foreign investments in the development of inbound tourism, as well as facilitation of tax, customs, and visa regimes [13]. All factors in the development of inbound tourism are interrelated, however, according to scientists, socio-economic factors are of particular importance. This involves the attitude to foreign tourists, as well as promoting investment in the development of inbound tourism, creating free economic zones of tourist and recreational areas, developing tourist infrastructure, forming the tourist image of the country, etc. [14].

Chen J. noted the possibility of combining the social and business goals of inbound tourism and proved that the productivity of solved business situations during a tourist trip was twice as high as that of normal working conditions in the office [15]. Other researchers also believe that inbound tourism is a new form of contemporary business

that allows optimizing the time of the manager (executive) since it makes it possible to combine at the same time work with leisure [16]. According to the latest UNWTO World Tourism Barometer survey, the number of international tourist arrivals worldwide in 2018 increased by 7% and exceeded 1.3 billion. The obtained results were partly due to the global economic recovery and sustained outbound demand on the part of many traditional and emerging markets, as well as a particularly sharp increase in the expense on tourism in Brazil and Russia after several years of decline in spending. The main objectives of the present research are the following ones: identifying key directions of inbound tourist flow in the context of individual countries to determine the target markets for the promotion of tourist destinations in the Russian Federation; drafting of recommendations for planning and organizing events aimed at promoting tourist destinations of the Russian Federation abroad to create conditions for increasing the export of tourist services.

Methods

To determine the target markets for the promotion of tourist destinations and to characterize the destinations of the inbound tourist flows, a set of research methods was used, namely: economic and logical analysis of statistical information of the UNWTO, the Department of Statistics and Data Management of the Bank of Russia, and Rosstat; general scientific comparison methods that allowed comparing data groups for a more detailed study of the promotion of tourist destinations.

Results

Determining the target foreign markets for the promotion of tourist destinations in the Russian Federation is based on the assessment of the attractiveness of each market segment, and the choice of certain segments to implement tourist products. To determine the target segment, first, it is necessary to evaluate the market segments. While evaluating, it is needed to determine segment size and its growth rate; the structural attractiveness of the segment, and to define market priorities for tourism product promotion (Fedulin et al., 2017). Today, the country's tourism industry faces the problem of choosing markets. The demand for tourist services exists in different countries since each country has a group of people who can buy offered tourist services.

Market selection problems have two aspects which should be made clear: countries in which the actual or potential level of demand would justify the cost of promoting tourist product; the potential customer groups or market segments to which the promotion of tour products should be targeted. Selecting a target market for tourist product promotion is a strategic decision, while defining a target group within the target market is an operational decision (Platonova et al., 2011).

The following criteria can be used to select target markets:

1) The market size. Determining the demand for tourist products in different periods of the year is especially valuable in combination with previous data and forecasts for the future, including the number of arrivals of foreign tourists from different countries of the world and the expenses for tourist purposes.

2) The geographical location of the market. In some markets, it is necessary to pay special attention to the route or service that is popular with customers.

3) Market access conditions. Another important criterion for selecting a market is the possibility of cooperation at the level of government structures.

4) Fast payback of the target market. All marketing efforts should be aimed at building strong and lasting preferences among current and potential customers. This requirement is a consequence of the relationship between the level of preferences and the market condition. Promotion activities are particularly effective for creating, preserving, and enhancing consumer preferences.

Current trends in the development of international tourism and the policy of states in this sector are of great interest to potential consumers of tourist services, tourism entities, scientists working in the field of economics, as well as government agencies in different countries involved in tourism regulation and development. Since the international tourism industry is one of the most important economic sectors, it affects the economic, cultural, and social development of regions and countries around the world. A current tendency of increasing the influence of tourism on the GDP generation in various countries can be seen based on statistics (Karmanova et al., 2015).

The development of inbound tourism is one of the important tasks for creating a foundation for sustainable economic growth, as well as increasing effectively the proportion of nonresource exports in the total exports turnover of the Russian Federation. Tourism provides an inflow of funds to the country's economy and has a powerful synergistic effect. Tourism stimulates an increase in the income of 53 sectors of the national economy that are involved in the creation of tourist products, is a multiplier of employment and self-employment, promotes the development and involvement of small and medium-sized businesses in export activities, improves the living conditions of the population at the local level, and smoothes the disparities of territorial development. According to the UNWTO, Russia is one of the ten countries most frequently visited by tourists (Artal-Tur et al., 2015).

In 2018, the number of international tourist arrivals worldwide has exceeded 1.3 billion (Platonova, Krivosheeva, Glinkina, 2016). According to the latest UNWTO World Tourism Barometer survey, the number of international tourist arrivals worldwide in 2018 has increased by 7%. Due to the Mediterranean destinations, Europe recorded outstanding results last year: the number of foreign arrivals had increased by 8%. The African continent has shown the same growth dynamics. In the Asia-Pacific region, growth reached 6%, in the Middle East 5%, while in the Americas 4%.

According to the UNWTO, 2018 was characterized by a steady increase in tourist arrivals in many countries, as well as a steady restoring of those destinations that suffered in previous years. As noted in the UNWTO review, such results were partly due to the global economic recovery and sustained demand emanated from many traditional and emerging markets, as well as a particularly sharp increase in tourism spending in Brazil

and Russia after several years of decline in spending (United Nations World Tourism Organization, n.d.).

When it comes to outbound tourism, China has no equal in the world. According to a report published by the UNWTO, spending by Chinese tourists abroad in 2018 amounted to USD 257.7 bln, having increased by 3% over the previous year. The second place was taken by the United States with spending of USD 135.2 bln spent on tourism abroad last year, which was by USD 11.6 bln more than in 2017. The USA has shown the largest increase in spending on outbound tourism among all countries worldwide during the reporting period.

Also, the five countries that spent the most on outbound tourism in 2018, were Germany with an indicator of USD 83.7 bln, the United Kingdom (USD 63.4 bln), France (USD 41.4 bln), Australia (USD 34 bln), Canada (USD 32 bln), the Republic of Korea (USD 30.6 bln), and Italy (USD 27.1 bln). According to the review, almost all markets reported an increase in spending on international tourism, which indicated an increase in travel opportunities, facilitation of visa procedures, and global economic recovery (Pogrebova et al., 2018). A strong and growing demand for travel abroad was observed in all regions of the world, in both advanced countries and countries with developing economies. Below is a list of the top 10 countries in terms of spending on outbound tourism: 1. China; 2. USA; 3. Germany; 4. Great Britain; 5. France; 6. Australia; 7. Canada; 8. Russia; 9. Republic of Korea; 10. Italy.

Among the countries not included in the top 10, the largest growth in tourism spending was shown by Brazil (USD 19.0 bln, +23.7%), Sweden (USD 17.0 bln, +12.4%), and Spain (USD 22.1 bln, +12.7%). Brazil has demonstrated strong positive growth dynamics and increased its outbound tourism spending by 23.7% in 2018 that allowed the country to rise by 8 positions and take the 16th place in the world with spending totaling USD 19 bln. India has also shown steady growth in spending on international travel with the total cost of USD 18.4 bln that exceeded last year's figures by 10.9% and allowed the country to go up by 4 points in the ranking and take the 17th place (United Nations World Tourism Organization, n.d.). Below is the list of top 7 countries by the average level of expenses (in USD per person) spent on tourism in the Russian Federation: 1. USA – 1,205.25; 2. Germany – 1,208.75; 3. France – 1,085.75; 4. Japan – 854.25; 5. United Kingdom – 770.5; 6. Italy – 825.75; 7. Republic of Korea – 754.75.

Russia's revenue from tourism increased to 3 trillion rubles in 2018, which made up about 3.47% of GDP. The growth of tourism revenues is one of the strategic goals set by President V. Putin. According to Putin, the contribution of tourism to the country's GDP should be at the level of developed countries, and Russia has a certain potential for this. From a formal statistical standpoint, Russia looks quite attractive for tourists: in 2018, it was visited by 24.4 mln people that allowed experts to call Russia the eighth most attractive tourist destination among the world's countries. However, this is more of an appearance. Of all arrivals to Russia in 2018, 69.5% were visitors from the former Soviet republics. The number of tourist arrivals from other countries of the world amounted to 7.432 thousand (30.5%).

The EU accounted for just 3.34 mln arrivals, of which almost 1.5 mln were border visits from Finland to St. Petersburg and from Poland to the Kaliningrad Region.

Moreover, for example, among the 580 thousand guests from Germany, a significant part was made up of former compatriots. The average check of a tourist coming to Russia (not a former compatriot, going to visit relatives) from the EU and the USA is approximately five to six times higher than that of tourists coming from the former Soviet Union. Unlike even the most frequent Chinese tourists in Russia, Europeans and Americans stay in more expensive hotels and visit more expensive restaurants (Platonova, Krivosheeva, 2015; Vapnyarskaya, 2017). As can be seen from official statistics, the number of inbound tourist trips of foreign citizens to Russia has been decreasing since 2016 (Tables 1 and 2).

Table 1. Number of inbound tourist trips of foreign citizens to Russia

Number of inbound tourist trips of foreign citizens to Russia, Thousand*			
2016	2017	2018	2018/2016
26,852	24,571	24,390	-9.2%

* Federal State Statistics Service, n.d.

Table 2. Number of inbound tourist trips of foreign citizens to Russia by countries

Number of inbound tourist trips of foreign citizens to Russia by countries				
	Thousand			%
	January-December 2017	January-December 2018	Dynamics of arrivals 2018/2017	
Total	24,571	24,390	-181	99.3
including				
Argentina	19	24	5	124.4
Australia	42	47	5	112.2
Austria	49	52	3	106.1
Belgium	35	36	1	104.2
Brazil	27	35	8	128.8
Bulgaria	27	27	0	101.6
Canada	40	51	11	126.2
China	1,289	1,478	189	114.7
Colombia	10	12	2	123.8
Croatia	9	9	0	98.4
Cuba	26	29	3	111.3
Czech Republic	40	41	1	103.3
Denmark	19	19	0	98.1
Egypt	11	10	-1	94.4
Finland	1,319	1,017	-302	77.1
France	177	185	8	104.6
Germany	566	580	14	102.4
Greece	27	27	0	99.7
Hungary	21	21	0	101.2

Number of inbound tourist trips of foreign citizens to Russia by countries				
	Thousand			%
	January-December 2017	January-December 2018	Dynamics of arrivals 2018/2017	
India	59	71	12	120.3
Irish	11	12	1	109.1
Islamic Republic of Iran	70	80	10	114.3
Israel	179	182	3	101.9
Italy	192	189	-3	98.4
Japan	85	102	17	120.5
Mexico	20	26	6	128.8
Mongolia	522	396	-126	75.9
Netherlands	57	60	3	104.5
Norway	45	51	6	113.0
Poland	1,017	714	-303	70.2
Portugal	15	16	1	109.0
Republic of Korea	161	254	93	157.8
Romania	15	17	2	116.6
Serbia	50	55	5	108.9
Slovakia	21	22	1	106.0
Slovenia	9	9	0	100.6
South Africa	7	11	4	157.1
Spain	109	110	1	101.0
Sweden	36	34	-2	95.4
Switzerland	48	49	1	101.1
Thailand	28	45	17	158.2
United Kingdom (Great Britain)	177	178	1	100.6
USA	239	282	43	118.0
Vietnam	36	43	7	118.5

The leading countries in terms of tourist arrivals are shown in descending order in Table 3. Table is based on Rosstat's official data.

Table 3. Leading countries in terms of the number of tourist arrivals in Russia, %

Countries	Growth leaders
Thailand	158.2
Republic of Korea	157.8
South Africa	157.1
Mexico	128.8
Brazil	128.8
Canada	126.2

Countries	Growth leaders
Argentina	124.4
Colombia	123.8
Japan	120.5
India	120.3
Vietnam	118.5
USA	118.0
Romania	116.6
China	114.7
Islamic Republic of Iran	114.3
Norway	113.0
Australia	112.2
Cuba	111.3
Irish	109.1
Portugal	109.0
Serbia	108.9
Austria	106.1
Slovakia	106.0
France	104.6
Netherlands	104.5
Belgium	104.2
Czech Republic	103.3
Germany	102.4
Israel	101.9
Bulgaria	101.6
Hungary	101.2
Switzerland	101.1
Spain	101.0
Slovenia	100.6
United Kingdom (Great Britain)	100.6
Greece	99.7
Croatia	98.4
Italy	98.4
Denmark	98.1
Sweden	95.4
Egypt	94.4
Finland	77.1
Mongolia	75.9
Poland	70.2

Table 4 presents a list of TOP 20 key destinations of the inbound tourist flows in terms of individual countries compiled based on a comparison of the above data with the

statistics on expenditure on outbound tourism of tourists from different countries.

Table 4. TOP 20 key destinations for inbound tourist flow in terms of individual countries

TOP 20 key destinations for inbound tourist flow in the context of individual countries
Republic of Korea
Brazil
Canada
Japan
India
USA
China
Islamic Republic of Iran
Norway
Australia
Austria
France
Netherlands
Belgium
Germany
Switzerland
Spain
United Kingdom (Great Britain)
Italy
Sweden

Discussion

The study of consumer expectations of tourists is based on the analysis of the consumer behavior of tourists. There are several distinct factors of consumer behavior in the tourism sector: purchases in tourism are often scheduled in advance and made with money saved for a certain time. This has significant impact on the timing of the trip decision; the cost of travel does not have an economic or material effect, these results are not tangible; the need to get to the certain destination; in this aspect, the consumption of a destination as a product has no analog; the round trip to the destination becomes part of tourism trip and has principal influence on the choice of destination and evaluation of the trip after returning; reflection on the journey; tourists remember their trip and live the sensations even months and sometimes years after their return; the interaction of a tourist with a destination always involves its interpretation; a tourist product is always unique, even if manufacturers (tour operators, tour bureaus, and hotels) make it mass; when consumed, tourists produce their feelings and experiences.

These factors must be taken into account when determining the consumer behavior of potential tourists. Choosing a destination as a key aspect of consumer behavior of a tourist represents a multistage process that begins long before the final

decision is made: awareness of the need to travel; search for information about destinations; evaluation and comparison of destination options; taking a final decision on the trip; evaluation of the trip in general and the destination in particular.

Deciding on a trip at each of its stages is influenced by the personal, behavioral characteristics of a potential tourist, the characteristics of the destination, as well as external factors, such as social structure, culture, etc. All factors that affect the consumer behavior of tourists can be divided into the following groups: personal factors (gender, age, family status, income level, psychological and behavioral characteristics); characteristics of the destination (transport capabilities, infrastructure, service, attractions, etc.); external environmental factors (a socio-economic situation, cultural aspects, etc.).

Managing numerous factors that influence the decision of tourists should become one of the main problems of a tourist destination. But not all factors are subject to external influence. The behavioral characteristics of a tourist are not directly manageable, but they can be indirectly influenced by providing a product that meets these features. The most important aspect when studying consumer behavior of tourists is motivation. Understanding motivation allows correctly identifying the right market segment, creating the product that will be in demand by the target audience, as well as developing an adequate marketing campaign for promotion. Matching the destination product to the main travel motives is the success formula in attracting tourists. It should be noted that there is no universal motivation. Different tourists have different motivations.

Thus, to determine the consumer expectations of tourists and their consumer behavior, it is necessary to: determine the tourist market segment that best matches the capabilities of the region; identify the main motives that underlie the behavior of potential tourists and determine their choice of destination; determine the profile of a potential tourist of the particular destination: his socio-demographic, behavioral, and psychological characteristics; reveal the most optimal communication channels for promoting a destination to a certain tourist segment; determine the factors that are dominant when choosing a destination for a specific tourist segment; determine whether the destination meets the expectations and needs of potential tourists.

Conducting this type of research is most effective in the form of a survey or questionnaire for tourists. First of all, foreign tourists are interested in the nature of Russia, next, in the history of the country, and national gastronomy. Most tourists over the age of 25 prefer to travel in tourist groups, while younger people choose independent adventure tourism. For example, the majority of tourists from the UK are people over 50 years old, who prefer the services of tour operators in organizing holidays in Russia. About 50% of German citizens arrange their trips independently (more and more widely via the Internet), the organized group tours are chosen by about 30% of travelers; while remaining 15% prefer other forms of booking through the travel agency. Most foreign travelers are interested in event-relating opportunities in Russia. This means that the event itself can become a reason to visit Russia. At that, the most important role in choosing an event for visits is played by the popularity of the event, i.e., the presence of positive associations or knowledge of the event itself or its venue. This is perfectly demonstrated by the 2018 FIFA World Cup.

The most popular topic of foreign visitors' interest is the one associated with unique natural phenomena, such as the white nights of St. Petersburg, the flowering of rhododendron in the Altai Region, or the end of the polar night in Murmansk. The second place is taken by historical reconstructions and sporting events. Currently, China's travel packages include Russian events such as Scarlet Sails (St. Petersburg), Northern Lights (Murmansk), Reindeer Herder's Day (Yamal), and White Nights. Travel agencies in Germany and Austria also successfully sell their tour packages, which include the famous tour of White Nights of St. Petersburg. It should be noted that the interest in White Nights tour results from a long advertising campaign started back in Soviet times.

Information about tourist products, national fests, and events is most often received by foreign tourists in travel agencies, through print media and social networks, and much less frequently from official or special websites and TV ads. For effective promotion, it is necessary to provide information both in electronic form and in print (catalogs, booklets, brochures, etc.). Both options are quite popular with tourists. Summer is the most active period for traveling. However, in some countries, long holiday weekends occur in other seasons for which residents also plan foreign trips. For example, in Iran, this is the time of celebrating Navruz, a holiday of spring and New Year's Eve, when the majority of organizations, including educational institutions, are closed from March 21 to April 4. Large flows of British people come to Russia from May to September. But most of the tourists come in September. This is because tour operators make discounts at this time to increase sales. Their offers are actively used by tourists.

Conclusion

Successful promotion of tourist destinations directly depends on their ability to meet consumer expectations and needs of tourists. Studying consumer expectations of tourists, consumer behavior, and the decision-making process for a trip should form the cornerstone of the strategy to promote tourist destinations. One of the main problems of tourism development in Russia is the lack of strategic marketing aimed at meeting the needs and expectations of potential tourists. The tourism development concepts in most Russian cities and regions are based on the availability of certain tourist products and resources, rather than on the analysis of the demand presented by potential tourists. At that, the competitiveness of a tourist destination depends entirely on the product's compliance with the tourists' expectations and needs. Consumer behavior is one of the most important aspects of marketing activities in any field, because it provides an understanding of consumer actions and, accordingly, the ability to anticipate, coordinate, and direct them, i.e., carry out all that is necessary for the successful implementation of products and services. To promote tourist destinations and take appropriate actions towards creating and promoting a tourist product, it is necessary to understand how people perceive tourist destinations, travel timeframes, and advertising. It is important to know what is the information that underlies deciding on a trip, how this decision is made, what are the factors that influence decision-making. It is also important to understand

what motivations underlie tourist behavior and who influences the decision. All these issues are related to consumer expectations of potential tourists.

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DIRETRIZES DE FLUXO DE ENTRADA DE TURISTAS PARA DETERMINAR OS MERCADOS-ALVO PARA A PROMOÇÃO DE DESTINOS TURÍSTICOS

Resumo: *As tendências atuais no desenvolvimento do turismo internacional e as políticas públicas de diferentes Estados nesse setor são de grande interesse para potenciais consumidores de serviços turísticos, entidades de turismo, cientistas que lidam com economia, bem como para agências governamentais de diferentes países envolvidos na regulação e desenvolvimento do turismo. Como a indústria internacional do turismo é um dos setores econômicos mais importantes, isto afeta o desenvolvimento econômico, cultural e social de regiões e países ao redor do mundo. O desenvolvimento do turismo de entrada é atualmente uma das prioridades das políticas públicas na indústria do turismo. É sabido que em muitos países do mundo o turismo de entrada contribui extensivamente para o tesouro e para a imagem do Estado. Este é uma das categorias mais importantes de exportação e, muitas vezes, é a principal fonte de receita cambial. A Rússia tem todo o necessário para o desenvolvimento da indústria do turismo, a saber, o ambiente natural, os recursos históricos, culturais e materiais. A relevância desse problema predetermina o grande interesse nessa questão por parte de cientistas e profissionais. Contudo, não existe atualmente um mecanismo eficaz para gerenciar o turismo de entrada, planejando e organizando eventos destinados a promover destinos turísticos. O artigo define no nível teórico as perspectivas para o desenvolvimento do turismo de entrada, os fatores que influenciam o desenvolvimento desta atividade e os critérios para selecionar seus mercados-alvo. Com base em dados da Organização Mundial de Turismo das Nações Unidas (UNWTO), o artigo apresenta os 10 principais países em termos de gastos com turismo de saída; com base em dados do Departamento de Estatística e Gerenciamento de Dados do Banco da Rússia, define os 7 principais países pelo nível médio de despesa para fins de turismo na Federação Russa; com base nos dados do Serviço Federal de Estatística do Estado (Rosstat), determina o número de viagens turísticas de entrada para cidadãos estrangeiros na Rússia. Em consequência da análise dos dados obtidos, é apresentado o processo de escolha de um destino como um aspecto-chave do comportamento do consumidor de um turista estrangeiro.*

Palavras-chave: *turismo, exportação, indústria do turismo, economia.*