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The review of the competitiveness of the tourism industry in the Khanty-Mansi Autonomous Area – Yugra under current conditions

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Abstract

The article looks into the tourism resources of the Khanty-Mansi Autonomous Area – Yugra. The availability of these resources may be prerequisites for the further development of the tourism industry in the Khanty-Mansi Autonomous Area – Yugra. From the point of view of economic development in the autonomous area, tourism can become one of the leading sectors, without taking into account the oil-gas-mining branch. Tourism being an aggregated branch of economic development will have a longer-term impact on the development of other areas of economic activity. The article revealed the main features of recreational complexes in the regions competing with the Khanty-Mansi Autonomous Area – Yugra (the Komi Republic, the Republic of Altai, the Republic of Karelia, the Perm Territory, and the Tyumen Region). And beyond that, the article justifies competitive advantages of the recreational complex in the tourism market of the Khanty-Mansi Autonomous Area – Yugra in comparison with recreational complexes in the regions-competitors.

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Keywords

Tourism potential, tourism, competitive advantages of the tourism industry, competitive types of tourism, Khanty-Mansi Autonomous Area – Yugra.

Introduction

Over the centuries, the area of the modern Khanty-Mansi Autonomous Area – Yugra was a strong magnet for hunters, fishermen, traders, travelers, etc. That was confirmed by numerous archaeological findings that were taken on the Khanty-Mansi Area. The wealth and biological diversity of the territory's ecosystems, authentic culture, and mining are potential resources for the development of the tourism industry of the autonomous area.

From the perspective of economic development of the autonomous area, the tourism sector can be one of the branches of the highest priority without taking into account the oil and gas industry. During the period 2005-2019, the share of tourism and part of its related industries in the GRP of the autonomous area is up to 1%. The tourism sector as an aggregated branch of economic development in the future will have a stimulating effect on the development of such areas of economic activity as museum business, collective accommodation services, transport, communications, trade, souvenir production, public catering, etc.

The article considers the tourist resources of the Khanty-Mansi Autonomous Area – Yugra, the presence of which may be a prerequisite for the further development of tourism in Yugra. For this purpose, we will analyze the recreational complexes of the regions competing with the Khanty-Mansi Autonomous Area – Yugra and will reveal the main competitive advantages of the recreational complex of the autonomous area in tourist markets compared to the recreational complexes of the regions-competitors.

There is a large number of studies on the problems of the development of the tourism industry in the regions of the Russian Federation. The features of the competitive environment in the market of tourist services in modern conditions are revealed in research conducted by L.I. Chernikova, V.A. Dianova, E.A. Fedorova, E.N. Klochko, A.B. Krutik, A.E. Pastukhova and others¹. Problems of formation and functioning of tourism clusters, models of assessment of competitiveness of regional tourism clusters are considered in the works of A.G. Arakelyan, R.M. Arsanova, N.N. Kiseleva, A.R. Simonyan². Innovative technologies of tourism management and regulation, as well as modern

¹ See: Fedorova E.A., Chernikova L.I., Pastukhova A.E. (2020) Regional'nye reitingi otsenki urovnya razvitiya turizma [Regional ratings for assessing the level of tourism development]. *Prostranstvennaya ekonomika* [Spatial economics], 1, pp. 106-128; Klochko E.N., Dianova V.A. (2021) Povyshenie konkurentosposobnosti turistskogo rynka Krasnodarskogo kraya v sovremennykh usloviyakh [Increasing the competitiveness of the tourism market of the Krasnodar Territory under modern conditions]. *Estestvenno-gumanitarnye issledovaniya* [Natural sciences and humanities research], 35, pp. 137-141; Krutik A.B. (2014) Osobennosti konkurentnoi sredy na rynke turisticheskikh uslug i konkurentosposobnost' turisticheskikh firm [The peculiarities of the competitive environment in the tourist services market and the competitiveness of travel companies]. *Nauchno-tehnicheskie vedomosti Sankt-Peterburgskogo gosudarstvennogo politekhnicheskogo universiteta. Ekonomicheskie nauki* [Scientific and technical bulletin of Saint Petersburg State Polytechnic University. Economic sciences], 1, pp. 98-104.

² See: Arakelyan A.G. (2020) Nekotorye osobennosti formirovaniya i funktsionirovaniya turistskikh klasterov [Some features of the formation and functioning of tourism clusters]. *Estestvenno-gumanitarnye issledovaniya* [Natural sciences and humanities research], 32 (6), pp. 51-57; Arakelyan A.G., Simonyan A.R. (2020) Ponyatie i model' otsenki konkurentosposobnosti turistskogo klastera [The concept of and the model for assessing the competitiveness of the tourism cluster]. *Finansy i upravlenie* [Finance and management], 4, pp. 58-68; Arsanova R.M., Kiseleva N.N. (2021) Usloviya i perspektivy razvitiya regional'nykh klasterov turistsko-rekreatsionnogo i bal'neologicheskogo tipov v Chechenskoj Respublike [Conditions and prospects for the development of regional clusters of tourist-recreational and balneological types in the Chechen Republic]. *Gosudarstvennoe i munitsipal'noe upravlenie. Uchenye zapiski* [State and municipal administration. Proceedings], 2, pp. 146-151.

marketing technologies for increasing the competitiveness of the tourism industry are investigated in the works of V.A. Dragina, E.Yu. Globa, Yu.O. Maksimova, V.I. Miroshnichenko, O.V. Shpyrnya and others³. The peculiarities of tourism development in the northern Russian regions are revealed in the works of D.A. Loginov, I.V. Loguntsova, N.V. Penkina, V.S. Petrova, I.A. Shavlukova, D.S. Timoshenko, N.Yu. Vedernikov, etc.⁴

Thus, there are a lot of literature sources which consider the problems of tourism development in Russian regions. It should be noted, however, that nowadays there is a need in the study of the competitiveness of the tourism industry of the northern regions of Russia, including the Khanty-Mansi Autonomous Area – Yugra.

Tourist traffic to the Autonomous Area does not yet have a stable pattern. Thus, low numbers of persons staying in collective accommodation facilities were observed in the crisis years 2011, 2015, 2020, characterized by a general decline in tourist flow in the Russian Federation.

To assess the success of the development of tourism in the region was invited to review the tourist opportunities of Yugra and the regions competing with the autonomous area. Competitive advantage has a long history of application in industry research regarding competition and competitiveness at the company or firm level. Its application to tourism and destinations management began after the work of M. Porter "The competitive advantages of nations" (1990)⁵. At the sectoral level, a competitive advantage is used to describe the ability of a company to create greater potential economic value (the difference between the perceived benefits of a customer who buys a firm's products or services and the full economic value of those products or services), than its competitors have. Globally, competitive advantage depends on a country's ability to innovatively achieve or maintain a competitive position in its key sectors over others. With regard to tourism and destination management, the competitive advantage is related to the ability to use destination resources efficiently and usefully in the long term [Crouch, Ritchie, 1999].

In the future, the analysis of competitive advantages of the region will lead to the development of a set of activities directed at the tourist development in the autonomous area. Particular attention should

3 See: Maksimova Yu.O. (2020) Innovatsionnye tekhnologii upravleniya i regulirovaniya sfery turizma i gostepriimstva [Innovative technologies for the management and regulation of the sphere of tourism and hospitality]. *Vestnik Assotsiatsii vuzov turizma i servisa* [Bulletin of the Association of Universities of Tourism and Service], 2, pp. 118-124; Shpyrnya O.V., Globa E.Yu., Dragina V.A., Miroshnichenko V.I. (2020) Sovremennye marketingovye tekhnologii kak faktor povysheniya konkurentosposobnosti predpriyatii industrii turizma [Modern marketing technologies as a factor in the improvement of the competitiveness of enterprises in the tourism industry]. *Nauchnyi vestnik Yuzhnogo instituta menedzhmenta* [Scientific bulletin of the Southern Institute of Management], 2, pp. 104-108.

4 See: Loginov D.A., Vedernikov N.Yu. (2020) Otsenka turisticheskogo potentsiala i turistskoi privlekatel'nosti v Yamalo-Nenetskom avtonomnom okruge [Assessing the tourism potential and tourist attractiveness in the Yamalo-Nenets Autonomous Area]. *Rossiiskie regiony: vzglyad v budushchee* [Russian regions: a look into the future], 1, pp. 24-34; Loguntsova I.V. (2020) Osobennosti razvitiya turizma v Arkticheskoi zone Rossii [The peculiarities of tourism development in the Arctic Zone of Russia]. *Gosudarstvennoe upravlenie* [State administration], 87, pp. 39-47; Penkina N.V. (2020) Brending territorii kak instrument prodvizheniya v turizme: opyt Khanty-Mansiiskogo avtonomnogo okruga – Yugry [Territory branding as a promotion tool in tourism: the experience of the Khanty-Mansi Autonomous Area – Yugra]. *Diskussiya* [Discussion], 1, pp. 40-48; Petrova V.S., Shavlukova I.A. (2021) Gosudarstvennoe upravlenie v sfere turizma v Khanty-Mansiiskom avtonomnom okruge – Yugre [State administration in the field of tourism in the Khanty-Mansi Autonomous Area – Yugra]. *Moskovskii ekonomicheskii zhurnal* [Moscow economic journal], 4, pp. 327-339; Timoshenko D.S. (2021) Brending arkticheskikh turistskikh destinatsii v Rossii [The branding of Arctic tourist destinations in Russia]. *Arktika i Sever* [The Arctic and the North], 42, pp. 257-270.

5 See: Porter M. (1990) *The competitive advantage of nations*. New York: Free Press.

be focused on developing the concept of "sustainable tourism" in the territory of the autonomous area, digitalizing the tourism industry, creating conditions for the formation and promotion of a tourism product that meets market requirements.

The results of the study

The territory of the autonomous area is a vast poorly divided plain with absolute elevations rarely reaching 200 m above sea level. In the western part, spurs and ridges of the mountain system of the Northern and Circumpolar Urals enter the territory of the district, on the border with the Komi Republic, there are maximum elevations of absolute heights in the territory of Yugra – 1895 m (Mount Narodnaya). The climate in the autonomous area is sharply continental. More than two thousand rivers flow through the district, their total length is 172 thousand km. The lake fund of the region has more than 300 thousand lakes. Commercial ichthyofauna is represented by 19 species. The hunting ground fund is 48.7 million hectares. Fauna is a typical taiga complex, 19 species of mammals are fishing. The basis of hunting avifauna (48 types) is formed by geese (gray and white-fronted), wood-grouses, black grouses-kosachs, hazel grouses, white partridges, ducks, etc. [Penkina, 2020, 43].

The historical and cultural potential of the autonomous area is diverse. Above all, it is a lot of museums (museums of local history, art, open-air) that are related to the ethnography of Yugra. There are sectoral museums that are related to the industrial development of the area in the 20th century. In addition, there are many various archaeological, architectural, paleontological, historical, natural museums and monuments associated with various historical eras of the development of the territory. The tourism potential is also represented by modern objects of physical culture and sports, health care, congress and exhibition infrastructure, environmentally friendly rural and specially protected natural territories.

The oil and food industry can play a significant role in the development of the tourism industry.

The availability of these resources in the autonomous area creates the prerequisites for the development of ethnographic, business, active, ecological, medical, consumer, and water types of tourism (table 1).

Table 1 - The main competitive advantages of the recreational complex of the Khanty-Mansi Autonomous Area – Yugra in the tourist markets

No.	The market / the type of tourism	The advantages of recreational complex in the domestic market	The main competitors
1	Ethnographic tourism	The presence of ethno-encampment, ethnic villages, with child and family programs, souvenir products, ethnographic events in the national event calendar, gastronomic ethnic programs, hunting, fishing, open-air ethnographic museums with a theatrical program, national theater, etc.	The Komi Republic, the Republic of Altai, the Republic of Karelia
2	Eco-tourism	A variety of natural and anthropogenic resources, natural monuments, specially protected natural areas and objects of various status, where scientific activity is carried out. Ecological trails, information boards, video resources, etc. Non-anthropogenic areas	The Komi Republic, the Republic of Altai, the Republic of Karelia
3	Active tourism	A variety of natural and anthropogenic resources that make it possible to make an individual combined tourist product more or less extreme, adventure, cognitive, etc.	The Perm Territory, the Komi Republic, the Republic of Altai

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No.	The market / the type of tourism	The advantages of recreational complex in the domestic market	The main competitors
4	Medical tourism	The availability of human and technical resources that can potentially be turned into tourist products of various types	Moscow, Saint Petersburg
5	Consumer tourism	Availability of valuable fish species, opportunities for trophy fishing and hunting	The Komi Republic, the Republic of Karelia
6	Water tourism	The Ob-Irtysh river basin provides unique opportunities for the development of cruise tourism	The Republic of Karelia

Consequently, the main competitive regions of Yugra are the regions relying on eco- and ethnographic tourism, in most cases – in combination with active, gastronomic and therapeutic and recreational tourism: the Komi Republic, Altai Republic, Karelia Republic and also Perm Area, Tyumen Region. The main characteristics of these regions are presented in table 2.

Table 2 - The main characteristics of recreational complexes in the regions competing with the Khanty-Mansi Autonomous Area – Yugra

No.	The region	Key resources	The position in the market
1	The Komi Republic	Natural resources, freedom from the civilization. Belonging to Finn-Ugric culture, presence of rich cultural potential (traditions of Komi nation). The main disadvantages – low transport accessibility. Poor infrastructure	Low position. The region as a whole and its individual facilities (with the exception of Manpuner) are almost unknown to task groups of tourists
2	The Republic of Altai	Natural resources, landscapes. Rich historical cultural resources. The main disadvantage – low transport accessibility and the high cost of the ticket	Middle position. The brand is less known than Karelia, but in general it is well known to most representatives of task groups
3	The Republic of Karelia	Natural resources (granite, lakes and others). A rich cultural heritage, belonging to Finno-Ugric culture; the presence of associations with the epic Kalevala. A high Transport accessibility, primarily for tourists from Finland, St. Petersburg, Moscow. The main disadvantage – active industrial development of the territory	High position (one of the most famous tourist brands in the post-Soviet space). There are certain well-known territorial brands – Kizhi, Valaam, petroglyphs, etc.
4	The Perm Territory	Rich natural resources. Separate monuments of Finno-Ugric culture. Monuments of the Stone Age, Middle Ages, Soviet history of the 20 th century. The main disadvantage – low transport accessibility	Middle position. At the same time, the region is actively working on branding the Perm Territory (an attempt to make a “fashionable place” from the capital of the region)
5	The Tyumen Region	Rich natural and historical cultural resources. Monuments of history related to the development of Siberia, to the royal family, to the Soviet history of the 20 th century. The main disadvantage – active industrial development of the territory	Middle position. At the same time, the region is actively working on promotion. There are some well-known territorial brands – Tobolsk and others

In this way, a variety of natural resources and a rich cultural potential are the primary resources for the development of tourism in these regions, including the Khanty-Mansi Autonomous Area – Yugra. The disadvantages of the tourism sector among almost all regions which we have considered include:

- low recognition among tourists (except for the Republic of Karelia);

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- non-working/unclear triggers;
 - the lack of storytelling;
 - insufficient diversity of developed and equipped routes;
 - the poor quality of the services provided;
 - the absence or a small number of additional services and businesses that allow increasing the amount of money that daily spending by tourists;
 - high cost;
 - the insufficient number of accommodation facilities of different categories, of roadside service, of scenery fields, of parking areas for excursion transport, etc.

It is therefore incorrect to say that the main competitive advantage of the recreational complex of Yugra in terms of promising directions for the development of tourism is the large number of natural and historical and cultural resources that can be converted into innovative tourist products for Russia. The tourism industry is an intersectoral economic complex specializing in the creation of a tourist product that can meet the needs of the population for leisure on a trip, through the production and sale of goods and services for tourist purposes. It is based on objective system functional, synergistic, evolutionary, and managerial ties. The common goal is to satisfy the tourist's needs for rest and impressions obtained during the trip by providing services and providing goods that will make the holiday comfortable.

Besides the recreational resources, the state support of the industry is important to the development of the tourist industry. An analysis of state programs aimed at the development of the industry was carried out both in the Khanty-Mansi Autonomous Area – Yugra and in regions that are potential competitors.

The following parameters were assessed: the amount of financing and the main activities.

In the Khanty-Mansi Autonomous Area – Yugra, there is the state program "Development of industry and tourism", approved by Decree of the Government of the Khanty-Mansi Autonomous Area – Yugra No. 357-p of October 5, 2018. Subprogramme II "Tourism development" is designed to implement the main activities from 2019 to 2030 with a planned funding volume of 488,985.1 thousand rubles. The main measures include support for the development of domestic and inbound tourism, the promotion of a regional tourist product in the Russian and foreign markets.

The state program "Development of culture and tourism" has been approved in the Komi Republic (Resolution of the Government of the Komi Republic No. 524 of October 31, 2019). Subprogramme 4 "Entrance and domestic tourism in the territory of the Komi Republic" is designed for the period 2020-2025. The planned amount of financing is 245,899.6 thousand rubles. The main planned activities are financial support for tourism actors; provision of public services (performance of works) by other cultural institutions; financial provision of services and works in the field of tourism; information and methodological support of subjects of tourist activity; organizing and conducting international, Russian and interregional events in the Komi Republic aimed at promoting the Komi Republic as a tourist destiny; positioning and promotion of tourist products of the Komi Republic; presentation of tourism products of the Komi Republic at regional, Russian and international events in the field of tourism; information support of subjects of tourist activity.

In the Republic of Altai, there is the state program "Development of domestic and inbound tourism" for the period 2020-2025, approved by Decree of the Government of the Republic of Altai No. 19 of February 3, 2020. The planned amount of funding is 3,767,984.2 thousand rubles. Within the framework of the program, the following main activities are planned: a study in the field of quality of the tourist product of the Republic of Altai; carrying out activities aimed at improving the quality of

tourism services; implementation of an individual program of socio-economic development of the Republic of Altai in the field of tourism.

In the Republic of Karelia, the state program "Tourism development" for the period 2016-2030, approved by Resolution of the Government of the Republic of Karelia No. 11-P of January 28, 2016, is being implemented. The planned amount of funding is 1,128,401.77 thousand rubles. Within the framework of the program, two main activities are planned: development of tourism potential; creation of engineering and transport infrastructure of tourist and recreational clusters in the Republic of Karelia.

In the Perm Territory, the state program "Economic policy and innovative development", approved by Decree of the Government of the Perm Territory No. 1325-p of October 3, 2013, is being implemented. The subprogramme "Tourism development" is designed for the period 2014-2024. The planned amount of funding is 580,457.6 thousand rubles. As part of the implementation of the program, the following activities are planned: promotion of tourism resources of the Perm Territory to the world and domestic markets and provision of activities (provision of services, performance of work) of state institutions (organizations).

It appears from these data that in all studied subjects there are state support programs for the development of the tourism industry, the main activities of which are aimed at the development and improvement of domestic and inbound tourism. Also, all rival regions pay great attention to promoting tourist opportunities. At the same time, it should be noted: despite the fact that the Khanty-Mansi Autonomous Area – Yugra is in a much better position than the regions are potential competitors, since unlike the rival regions it is a donor region, the financial support provided to the industry is less than that of the rival regions.

Another tool that makes it possible to find out how competitive the Yugra tourism industry is the domestic tourism index. The tourism index is used to estimate the dynamics of tourist flow in the region based on the following parameters: the number of unique tourists, the number of tourists from distant regions and abroad, the amount of tourists spending, the share of loyal tourists, the average duration of the trip, the revenue of companies in the tourism sector, the index value in January 2018 is taken as the base. Consider its values for 2021 (Figure 1).

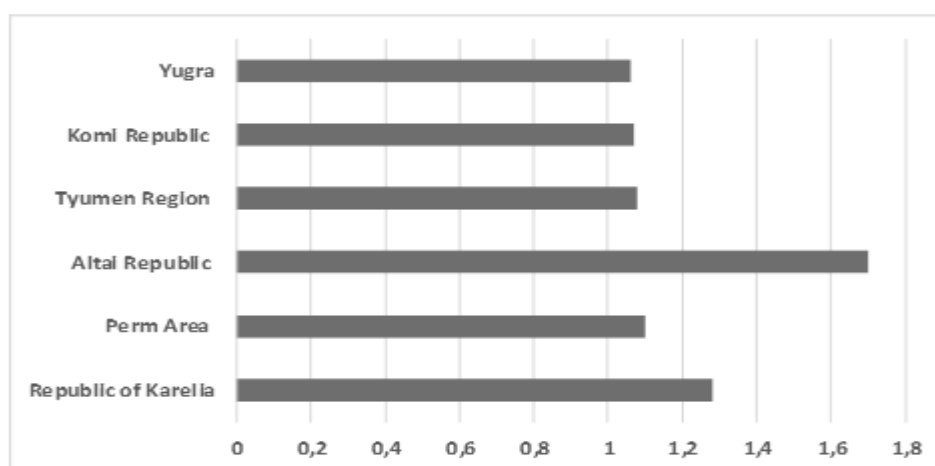


Figure 1 - The value of the tourism index in competing regions⁶

⁶ The histogram was compiled by the authors on the basis of the following source: [Индекс..., www].

The undisputed leader of the affected regions is the Altai Republic (index 1.7) and the Republic of Karelia (1.28). It should be noted that these regions are part of the Altai and Russian North and Western Arctic tourist macro-regions of Russia, which affects their tourism index, which is quite high. The remaining regions are in approximately the same position: the Perm Territory (1.11), the Tyumen Region (1.08), the Komi Republic (1.07), Yugra (1.06).

Conclusion

So it's hard to say that the tourism industry of Yugra at the present stage can compete with the Republics of Altai and Karelia because despite the same tourist resources their experience, state support, the pace of development are too different. The tourism industry in Yugra began to develop much later compared to them. At the same time, the region could well compete with the Perm Territory, the Tyumen Region, and the Komi Republic. To do that, it is necessary to pay attention to five essential parameters that need to be immediately improved to maintain the development of the industry: the general infrastructure, the management of the tourist destination (DMO), the development of human resources, the environmental management and the state support of tourism, where the government must play a decisive role in terms of the development of tourism infrastructure and environmental policy, as well as a training and certification among industry players.

As a complex of the actions directed on the further development of tourism in the autonomous area should provide:

- the development of the concept of “sustainable tourism” in the autonomous area;
- the need for digitalization of the tourism industry in the autonomous area;
- the creation of conditions for the shaping and promoting of the tourist product that meets the requirements of the market;
- the creation of conditions for the quality improvement of the tourism services;
- the formation of the positive investment climate in tourism;
- the organization of professional training in the tourism industry and accommodation facilities industry.

Yugra is able to accept far more tourists who are willing to admire its natural beauty and its cultural diversity, especially if it is accompanied by good infrastructure and qualified authentic service.

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Анализ конкурентоспособности туристской отрасли Ханты-Мансийского автономного округа – Югры в современных условиях

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Аннотация

В статье рассматриваются туристские ресурсы Ханты-Мансийского автономного округа – Югры, наличие которых может стать предпосылкой для дальнейшего развития в Югре индустрии туризма. С точки зрения экономического развития автономного округа туризм может стать одной из отраслей первоочередной важности (без учета нефтегазодобывающей отрасли). Туризм как агрегированная отрасль экономического развития в перспективе окажет стимулирующее воздействие на развитие других сфер экономической деятельности. В статье выявлены главные характеристики рекреационных комплексов регионов – конкурентов Ханты-Мансийского автономного округа – Югры (Республики Коми, Республики Алтай, Республики Карелия, Пермского края), а также обоснованы конкурентные преимущества рекреационного комплекса автономного округа на туристских рынках в сравнении с рекреационными комплексами регионов-конкурентов.

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Ключевые слова

Туристский потенциал, туризм, конкурентные преимущества туристской отрасли,

конкурентоспособные виды туризма, Ханты-Мансийский автономный округ – Югра.

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