INBOUND TOURISM IN LATVIA DURING THREE DECADES OF INDEPENDENCE: DEVELOPMENT PHASES, KEY DRIVERS AND CHALLENGES

IENĀKOŠAIS TŪRISMS LATVIJĀ: ATTĪSTĪBA UN TO NOTEICOŠIE FAKTORI PIRMAJĀS TRĪS DESMITGADĒS PĒC NEATKARĪBAS ATGŪŠANAS

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Abstract
This article reviews the development of inbound tourism in Latvia over the three decades following the restoration of its independence following occupation by the USSR. The analysis uses the tourist area life cycle framework, which describes tourism development and factors during different development stages. The first stage can be described as the post 1991–2000 "economic pivot and transition phase", where the orientation of the tourism economy shifted from east to west. Secondly, a "tourism boom phase" occurred between 2001–2009, bookended by the commencement of the EU transition process and concluding with the global financial crisis in Europe. Thirdly, a "managed growth phase" was characterised by a period of steady growth of the tourism economy. This phase included the demand surge associated with Riga becoming the European Union's "capital of culture" and greater integration with external industry trends, concluding with the COVID-19 crisis of 2020. The article describes the crucial developmental factors and challenges in each development phase of post-independence inbound tourism.
Keywords: *tourist area life cycle, tourism development, inbound tourism, Latvia*

Introduction

Tourism is an economic sector that reflects the socio-economic processes, achievements and dynamics of the country and the wider Baltic region. In 2019, Latvia's tourism exports reached 1.002 billion euros (5.1% of the country's total exports), and the total contribution of travel and tourism to the national GDP reached 7.6% (WTTC, 2021). Furthermore, Latvia can be regarded as one of the great success stories within the EU, with the number of foreign tourists tripling since 1997, reaching 1.9 million in 2019, while the number of overnight stays more than doubled, reaching 8.26 million (CSB, 2020).

Examining past tourism development and identifying the factors influencing it can help with planning further tourism development, assessing risks and choosing appropriate future strategies.

Prior to 1991, Central and Eastern Europe, including the Baltic region, had been less explored by researchers due to limited access to these countries and data (Hughes & Allan, 2009). The most common issues concerning the development of Baltic tourism are reflected in the context of the collapse of the USSR and the related transition in Central and Eastern Europe as a whole (Hall, 2000; Hall, 2008; Hall, 2017; Niewiadomski, 2018; Light et al., 2020), and accession to the EU (Hughes & Allen, 2009). Even though similarities exist between these countries, each had its own transition and development path (Jaakson, 1998).

The periodisation of tourism development in Latvia since restoration of its independence has been conducted according to historical characteristics, with the first stage being the period after the restoration of independence in 1991 (Rozīte, 1999; Atstāja et al., 2011). Highlighting the significant differences in tourism development, Upchurch and Teivane (2000) consider it the formative (i.e., introductory) stage of development.

The paper aims to identify the phase of the life cycle that inbound tourism in Latvia is in and the key factors that have determined both the development and the transition to a new stage of development.

Data and methods

This study is based on the tourist area life cycle (TALC) concept introduced and developed by Richard Butler in 1980 (Butler, 2006), which identifies six phases of development: the *exploration*, *involvement*, *development, consolidation*, *stagnation* and *decline* or *rejuvenation* stage. The model includes an S-shaped life cycle curve, with time on the x-axis and the number of tourists on the y-axis. The model uses different criteria, such as tourist arrivals, description of the historical development of the place, accommodation dynamics, role of government/policy, tourism demand and products. The identification of phases is based on the standard deviation of growth in the specific data available for a particular place. It is suggested to use quantitative data (number of tourists, tourism share in GDP, accommodation capacity) to identify the sequence of TALC stages and qualitative indicators (Control – DMO/Government; changes in the macro environment; changes in tourism products, transport, accommodation, restaurants, market segments, infrastructure, etc.), which in turn allow a time axis to be delineated, and turning points to be identified (Gore et al., 2022). The TALC has also been applied to characterise tourism development in different countries (Butler, 2006; Kristjánsdóttir, 2016).

In order to describe the development of tourism in the context of inbound tourism (Figure 1), official statistical data have been used in a life cycle model: the number of overnight travellers by year from 1997 to 2019. Although the time frame of this study starts in 1991, the life cycle is only mapped from 1997, since this is when comparative data are available. In addition, secondary data (official tourism statistics: number of nights in accommodation, total revenue, mode of transport used, etc.) have been used to identify and describe the development phases as well as content analysis (newspapers) and expert interviews conducted by the researchers.

Results

The destination life cycle has been analysed from 1991, which we consider the beginning of a new life cycle, as political and economic processes led to a complete change in the tourism sector. Overall, three broad developmental phases of Latvian inbound tourism development were identified (Figure 1): (1) the post 1991–2000 "economic pivot and transition phase"; (2) a "tourism boom or intensive development phase" from 2001–2009; (3) the "managed growth phase" (2010–2019). The first phase corresponds to the involvement phase in Butler's (1980) life cycle model, while the second and third phases of inbound tourism development correspond to the development phase.

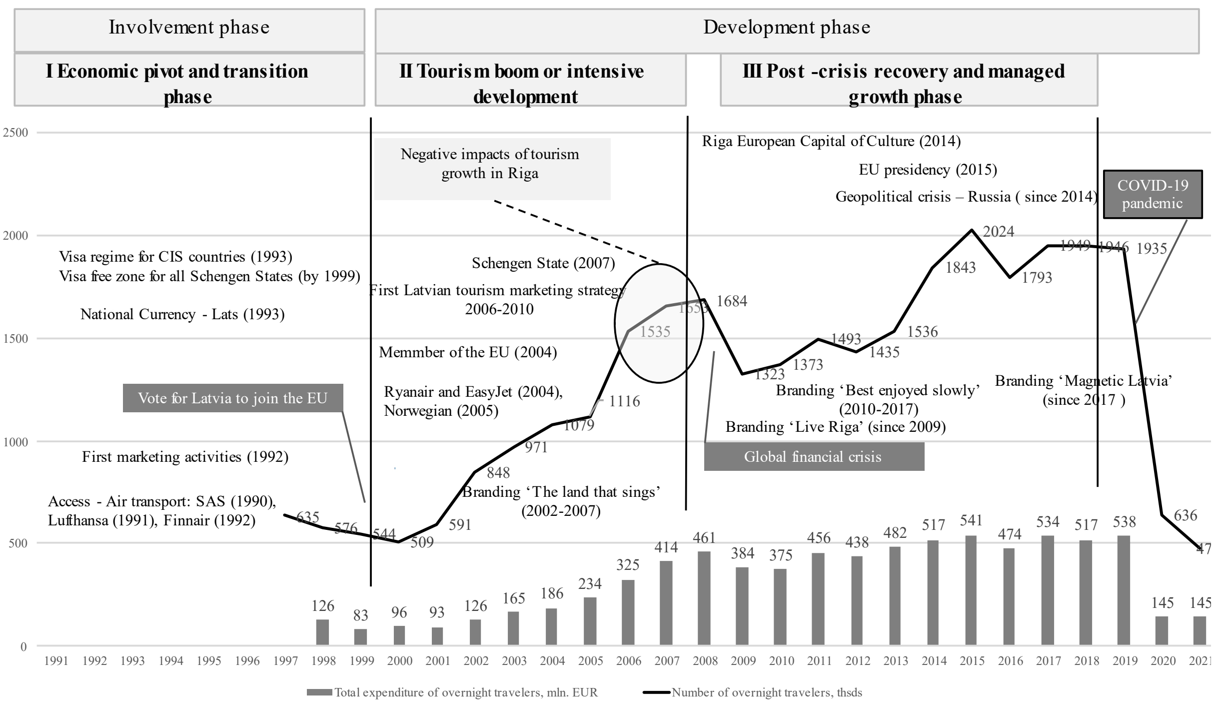

Figure 1. **The destination life cycle: inbound tourism to Latvia (**authors' figure based on CSB 2022)

Economic pivot and transition phase (1991–2000)

This phase of post-restoration-of-independence tourism development commenced in 1991 and culminated in the December 1999 vote in Helsinki for Latvia to join the European Union. After regaining independence, tourism was considered an opportunity for economic development and transformation, as in other Central and Eastern European countries (Niewiadomski, 2018).

However, the industry faced development barriers, including disputes surrounding the recovery of nationalised property, a lack of local capital and foreign investment, derelict and inadequate infrastructure for development, insufficient local entrepreneurial spirit and business culture, and the overall non-conformity of the labour force with free-market requirements (Jaakson, 1998). Although tourism was defined as a priority, the Latvian government did not invest significantly in the industry, and tourism development was driven predominantly by a rapidly growing private sector (Light et al., 2020).

One of the most critical features of this transition period was the diversion of tourist flows from eastern to western markets. In Latvia, the number of nights spent by foreign travellers in accommodation establishments dropped and reached a negative growth rate of -1.4% over the period (CSB, 2022). In addition, tourist flows from former Soviet republics, mainly Russia, began to decline due to the introduction of a visa regime with these countries (1993), and the high post-independence national currency exchange rate made Latvia an expensive and even more unattractive destination (Van der Steina, 2021). The introduction of visa regimes with former Soviet countries had a negative impact on tourist flows from the East, but the introduction of visa-free regimes with Western countries boosted flows from the West. In 1993, visa-free travel existed with five countries, while by 1999 visa-free travel existed with 31, including all Schengen member states.

In 1991, inbound travel agencies served 47,400 tourists from CIS countries, but in 1995 only 456. In contrast, the number of EU tourists increased from 18,400 to 27,100 (CSB, 2022); however, the Western market could not compensate for the loss of Eastern tourist flows.

Table 1. **Investments in hotel and restaurant business 1994–2000. Lats[1], million**
(data from CSB, 2001)

USA	30.97	Russia	1.03
Austria	10.50	United Kingdom	0.92
Sweden	1.88	Denmark	0.72
Germany	1.33		

After the initial interest generated by increased accessibility into what was perceived as a “new travel option” in Northern Europe, Western tourists arriving at Riga Airport faced sub-standard tourism offers and infrastructure, and unreasonably high prices caused by an insufficient supply of accommodation and unfair business

[1] Exchange rate 1 EUR – 0.702804 LVL (Lats)

practices that prioritised short-term economic gain. It was only from 1996 onwards that a supply of mid-range accommodation for Western leisure tourists was developed, driven by foreign investment in the accommodation sector (Table 1). Investment increased by 84 times from 1992 to 1999 (CSB, 2022).

Although the supply of tourism products gradually became more attractive to leisure travellers, business tourism still dominated the tourism economy, accounting for 45% of arrivals in 2000, with only 18% of foreign visitors motivated by leisure (CSB, 2022).

Destination access was one of the critical factors driving Western tourist arrivals. In 1992, almost half of foreign visitors to Riga arrived by cruise ship (Rudušs, 1993), although the airlines SAS (1990), Lufthansa (1991) and Finnair (1992) had started regular flights to Riga. By 2000, inbound tourism was dominated by road transport, accounting for 81% of foreign tourists, mainly from neighbouring Estonia and Lithuania (CSB, 2022).

In terms of the inbound tourism management sector in 1993, approximately 40 travel agencies initially (until 1996) handled Latvian diaspora tourists (Zeltiņa, 2020) from the USA, Germany, Sweden and the UK. The combined share of tourists from these four countries (the USA, Germany, the UK, Sweden) in the total number served by tourism companies reached 19% in 1991, 43% in 1993 (when the Latvian Folk Song Festival was held) and 56% in 1994 (CSB, 2022).

In this development phase, the Western–based diaspora played an essential role by investing directly in the hospitality sector. From 1992–2005, out of 147 companies with Western-based diaspora capital, 41 (28%) were engaged in trade, hotel and restaurant business (Dimante, 2007). In addition, donations (estimated at around 14.821 million lats from 1991 to 2005) from Latvians abroad led to the establishment of the Occupation Museum (1993) and the restoration of the Latvian National Opera House and Freedom Monument (65% diaspora donations) (Dimante, 2007).

It was also during this period that the government became aware of the country's lack of visibility on the world stage, particularly within Europe. The first tourism marketing activities were implemented via participation in international tourism fairs (from 1992), provision of tourism information materials/brochures, and organisation of journalist visits.

The "tourism boom or intensive development phase" (2001–2009)

The approval of Latvia to join the EU in 2004 was a key watershed moment in tourism development, and the period between 2001 and 2008 stimulated rapid industry development. During this phase, the average annual growth rate of visitors was 17%; over the whole period, the number tripled, reaching 1.7 million (CSB, 2021). Rapid growth was observed from 2003 until 2006, during which international arrivals grew by 58%, and tourism receipts doubled. The number of nights spent by foreign travellers in accommodations increased 2.5 times (2.1 million nights in 2008) over the whole period, and the average annual growth rate was 15.3%. As a result, international tourism receipts grew annually on average by 22.4% (UNWTO, 2021).

The progress towards joining the EU in 2004 clearly influenced tourism during this development phase. Jarvis and Kallas (2006) in their study on neighbouring Estonia proposed a model demonstrating that EU accession process impacted tourism development in three ways, and it is also applicable to Latvia.

Firstly, it facilitated greater access to the destination as the open sky policy opened up Riga to low-cost carriers (Ryanair and EasyJet in 2004, Norwegian in 2005) (Pijet-Migon, 2017) and allowed the rapid expansion of the national airline AirBaltic. As a result, the number of regular AirBaltic routes increased from 12 (in 2003) to 45 (in 2007) (AirBaltic data). Consequently, passenger numbers at Riga International Airport rose by 49% in 2004, by 77% in 2005 and by 33% in 2006 (CSB, 2022). In 2003, air transport was used by 8% of inbound tourists to Latvia, and it reached 47% by 2008 (CSB, 2022).

Secondly, EU accession stimulated increased awareness of the destination as many journalists visited and published stories on new EU member countries. In 2005 alone, the Latvian Institute organised 30 publications for Latvia, reports in foreign media, and organised visits of 51 foreign journalists to Latvia (LI, 2005). Publications describing Riga as an attractive destination appeared, not only in Europe (Van der Steina, 2021).

Thirdly, accession to the EU stimulated increased foreign direct investment in the restaurant and hotel industry. From 1999–2009, foreign investment stock in equity capital in the hotel and restaurant sector increased by 5.6 times and reached 86 million euros (CSB, 2022). Latvia, particularly Riga, experienced rapid growth in hotel capacity. Over the period, bed numbers in Riga increased by 2.6 times, reaching 20,383 beds in 2009 (CSB, 2022).

Following accession to the EU, increased funding for tourism development came from EU structural funds. Between 2004–2006, 22 million euros were directly allocated to tourism (ESfondi.lv, 2022).

The post-2000 period saw the national government take a much more proactive role in tourism development. There was strong political support for developing the tourism economy, and the national budget for tourism more than doubled, reaching 1.44 million euros in 2004 (Druva-Druvaskalne et al., 2006) and 1.6 million in 2009. The Latvian Tourism Development Agency (LTDA), responsible for implementing tourism policy and marketing, was established under the Ministry of Economics. The first Latvian tourism marketing strategy was drafted, for the period 2006–2010.

This development phase was marked by well-targeted marketing activities in foreign markets, increasing the awareness of Latvia as a travel destination. Marketing activities included participation in tourism fairs, setting up tourist information centres in high-priority markets, advertising campaigns abroad, producing image and thematic brochures and creating a national tourism website. During this period, the first destination branding attempts were made, with the logo and slogan “The land that sings”.

The combination of increased awareness and access saw Riga being subject to unsustainable levels of growth. The rapid increase in the number of tourists led to sharp price rises, especially in tourist areas; due to direct flight connections and affordable prices, short inbound city breaks became popular; and the nightlife attracted stag-party tourists to Riga (Van der Steina & Rozite, 2018; Light et al., 2020). Local and foreign media increasingly reported on the development of Riga as an entertainment and nightlife destination, which attracted stag party tourists, especially from Great Britain, and the local community grew to dislike the inappropriate behaviour of these visitors.

This boom in inbound tourism was brought to an end by the decline in tourist arrivals caused by the global financial/economic crisis in 2009. The number of international arrivals declined by 21% (CSB, 2022), and spending by foreign travellers decreased by 5% (UNWTO, 2021).

Managed Growth Phase (2010–2019)

Tourism development in Latvia during this phase was bookended by two major global events that impacted development, starting with the global financial crisis and ending with the arrival of the Covid-19 global health crisis in March 2020. This phase can be defined as a period that saw the development of the industry follow a trajectory more in common with the other countries of Northern Europe as Latvia became more proactive in managing industry growth.

In this phase, the number of international arrivals increased on average by 4.2% annually, and by 41% over the period from 2010 to 2019 (CSB, 2022). The average annual growth rate of the number of nights spent by foreign travellers in accommodations reached 8.6%, and the growth over the whole period was 101% (Eurostat, 2021). Notably, the number of foreign tourists only returned to pre-financial crisis (2008) levels in 2014. As a result, the total international tourism receipts grew by 58% over the period, reaching 1.02 billion USD (UNWTO, 2021).

Riga's increased recognition as an attractive travel destination played an important role in this managed growth phase. The implementation of the “Live Riga” brand (2010) took place, positioning Riga as “the new capital of Northern Europe under Nordic Skies” where “people want to live, study and work, and stay for a while” (Embassy, 2009), and European-level events such as Riga being the European Capital of Culture and the Latvian Presidency of the EU Council further promoted the capital. Riga municipality spent around two million euros each year marketing the city in the main target markets (Germany, Russia, Scandinavia, Estonia, Lithuania, the Netherlands and Italy).

However, this phase also saw an increasing issue with a lack of dispersion outside the capital. Although Latvia's regions were actively promoted in foreign markets by national and regional DMOs, 74% of overnight stays by foreign guests were still concentrated in Riga (CSB, 2020). Being aware of Riga's limited capacity and the negative impact of the excessively rapid tourism growth (Van der Steina & Rozite, 2018), this phase was marked by attempts to disperse foreign tourism flows outside Riga as well by developing appropriate products, as well as by using Latvia's tourism branding strategy “Best enjoyed slowly” (2010–2017) and targeted promotion of regions abroad.

The objectives of creating the new national tourism brand aligned with the national tourism marketing strategy (2010–2015) were threefold: firstly, to increase the length of tourist stay and the economic share of the tourism sector in the national economy; secondly, to promote the development of domestic tourism; and thirdly, to increase the number of tourists and spending in regions.

Due to changes in the political governance of tourism, the brand “Best enjoyed slowly” was replaced in 2017 by the slogan and logo used for other export industries, “Magnetic Latvia”, which had no clear values or vision for tourism development. The data presented in Figure 1 shows a drop of 14.4 % (compared with the previous year) in the number of foreign tourists in 2016, which may be related to Russia's military activities in Ukraine, EU sanctions and the associated depreciation of the Russian rouble. The Russian market to Latvia decreased by more than 40% in early 2015 (CSB, 2022), leading to a sharp drop in revenue for accommodation establishments, tour operators, agencies, souvenir traders and restaurants. However, the impact of the Russian market does not appear in the overall inbound figures in 2015, as it was compensated for by growth in Nordic and Western European tourists.

Two other external challenges that affected the development of Latvian inbound tourism during this period are related to the growth of the importance of the sharing economy and the increase of Asian, in particular Chinese, inbound tourism to Europe, with nearby Helsinki promoted as the fastest gateway to Europe from Asia.

The number of nights spent (in commercial accommodation) by Chinese tourists in Latvia grew on average at 33% a year during the period 2010–2019 (CSB, 2022). In addition, Airbnb activity in Riga showed strong growth in overnight stays in 2018, with an increase of 52% (248,000 overnight stays) compared to 2017; Airbnb’s market share was 9% (Colliers International, 2019).

Given the higher economic contribution of business tourism to the national economy, developing business tourism was one of the country's priorities. The Riga Convention Bureau “Meet Riga” (since 2011) and the Latvian Convention Bureau (since 2016) were active in developing business tourism and attracting international events. According to ICCA (2019), in 2018, the country hosted 41 international events, 35 of them in Riga, which is considered to be the main or even the only player at the international level. Health tourism, including the medical sector, is also recognised as a priority.

The "managed growth" phase ended with the global Covid-19 pandemic crisis when, starting in March 2020, international tourism flows stopped worldwide, and for the following two years the tourism industry operated under challenging conditions.

Conclusion

This article uses the TALC method to analyse tourism development in Latvia since 1991. There are three phases of development identified in Latvian inbound tourism; economic pivot (1991–2000), tourism boom (2001–2009) and managed growth (2010–2019). During the "economic pivot" phase, the main challenges were destination access, tourism services and infrastructure quality, and the limited awareness of Latvia, including Riga, as a travel destination. The main development drivers were the development of air transport, the implementation of a visa-free regime, foreign investment and the strategic impact that the diaspora played.

The "tourism boom" phase was driven by factors related to EU accession (low-cost carrier access, foreign investment and international media coverage), which contributed to awareness of Latvia, accessibility, visibility and the development of tourism services and infrastructure. However, the main challenge during this period was managing the consequences of the associated surge in demand, most notably highlighted by "unwanted guests" such as British stags.

In the third, "managed growth" phase, the most significant challenge in the context of inbound tourism was the wider post-financial crisis recovery within the EU, the geopolitical issues surrounding the illegal Russian invasion of Crimea and eastern Ukraine, and the associated decline in Russian inbound tourism. The main drivers of inbound tourism were the popularity of the capital, Riga; mega-events such as the EU Capital of Culture; regional and global tourism trends (Asian market development, Airbnb); the crisis related to the Russian inbound market; and targeted national tourism management and marketing approaches.

The Latvian tourism economy can still be considered to be in a developmental phase, as Latvia's physical and social capacity as a tourism destination has not yet been reached. However, it should be noted that the pace of development in the post-Covid pandemic phase will depend on external factors and the chosen tourism development strategy because, as Gore et al. (2022) have pointed out, the development phase is a critical planning phase that requires a sustainable approach. Moreover, in a generally uncertain world, the ability to respond to crises will determine a destination's competitiveness (Ritchie & Crouch, 2003).

Due to the limited scope of this article, a comparison of the development of Latvian inbound tourism in the Baltic and European context is missing, which should be considered a limitation of the article.

Kopsavilkums

Šajā rakstā tiek raksturota ienākošā tūrisma attīstība Latvijā kopš neatkarības atgūšanas līdz Covid-19 pandēmijai. Izmantojot Ričarda Batlera (Richard Butler) tūrisma vietas dzīves cikla modeli, ienākošā tūrisma attīstība tiek iedalīta trīs periodos, raksturojot izaugsmes tempus un galvenos attīstību ietekmējošos faktorus. No 1991.- 2000.gadam "ekonomikas pagrieziena un tūrisma agrīnās attīstības periods" iezīmējas ar pāreju uz tirgus ekonomiku, iekļaušanos starptautiskajā tūrisma sistēmā un ienākošajā tūrismā fokusa maiņu no austrumu uz rietumu tirgiem. Galvenie izaicinājumi šajā periodā ir pieejamības nodrošināšana, tūrisma piedāvājuma un infrastruktūras attīstība. Periods no 2001. līdz 2009. gadam raksturojams kā "straujās attīstības fāze", ko virza iestāšanās procesi Eiropas Savienībā, veicinot gan atpazīstamību, aviotransporta attīstību un ārvalstu investīcijas nozarē. Šis periods atklāj arī pārāk straujās tūrisma nozares attīstības izraisīto negatīvo ietekmi. Globālā ekonomiskā krīze ir robežšķirtne starp straujo attīstības fāzi un "pēc krīzes atgūšanās un vadītas izaugsmes periodu", kad ienākošā tūrismā līdz pat Covid-19 krīzei nozīmīga loma ir stratēģiskai attīstības plānošanai, mērķtiecīgām mārketinga aktivitātēm, ārējiem makrovides faktoriem un globālajām tūrisma tendencēm.

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