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SPATIAL CHARACTERISTICS OF THE TOURISM SECTOR LABOUR MARKET IN THE KALININGRAD REGION

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Under mounting demographic pressures, restrictions on recruiting foreign labour, and an economy-wide wage race, competition for workers in the tourism sector has intensified considerably. This pressure is further exacerbated by the rapid growth of domestic tourism and the incorporation of new territories into the tourism landscape. These challenges are fully characteristic of the Kaliningrad region; however, efforts to address workforce shortages have become significantly more complex since 2022, owing to the heightened structural costs associated with the region's exclave status. The objective of this study is to identify and evaluate spatial disparities in the development of the tourism labour market in the Kaliningrad region and, on this basis, to propose measures aimed at strengthening human-resource capacity. The empirical basis of this study is drawn from statistical data from Rosstat and its regional office (Kaliningradstat) concerning tourism development in the region. In addition, the analysis uses data from the Ministry of Social Policy of the Kaliningrad region on labour force demand, as well as information from the SPARK-Interfax database on accommodation and food-service enterprises, disaggregated by municipality. General scientific, statistical, and cartographic methods were employed to process and interpret the data. The findings indicate that the spatial evolution of the regional labour market reflects a gradual eastward shift in tourism activities and increasing engagement in the near and distant suburbs of the regional centre — areas that had previously been less affected by tourism development. At the same time, this expansion is driven primarily by the growth of the food-service sector, while the involvement of the working-age population in formal employment in the accommodation sector remains limited. Enhancing human-resource potential

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in these areas requires adapting the vocational training system in cooperation with representatives of the tourism industry and improving mechanisms supporting labour mobility.

Keywords:
labour market, tourism, labour shortage, job vacancies, spatial disparities, Kaliningrad oblast

Introduction

Since 2014, the tourism and recreation sector in the exclave Kaliningrad region has been undergoing marked development: the region has consistently ranked high in tourism attractiveness as new destinations and visitor hubs emerge, tourism and recreation infrastructure expands, and tourist numbers rise year on year. This has led to increasing holiday costs in the exclave's resorts. The principal drivers comprise the hosting of the 2018 FIFA World Cup and the substitution of foreign travel prompted by the reduced accessibility of overseas holidays during the COVID-19 pandemic and in the period following 2022.

The accommodation and food service sector (it will be referred to as the tourism sector below) accounts for more than 3 % of regional employment, which places the region ahead of many of its Russian counterparts, ranking 12th in 2024. However, the industry's contribution to the development of the region's territories remains uneven: while the north-western coastal area and the administrative centre, Kaliningrad, have traditionally developed most briskly, other areas are only loosely integrated into tourism and recreation activities. This discrepancy creates socio-economic issues and tensions. Increasingly, resort areas become difficult to access during the high season, with hours-long traffic jams on the roads, overcrowded beaches and rising prices for goods and services.

These processes have fostered negative attitudes among local residents towards the increasing inflow of tourists. At the same time, however, in the coastal zone of the Kaliningrad region and in Kaliningrad itself, demand for tourism services has driven income growth among residents employed in the industry. Revenue from tourism is generated through full-time, part-time and seasonal employment, self-employment and the renting out of accommodation to visitors. In addition, the multiplier effect of tourism generates demand for jobs in related industries, such as the production and sale of souvenirs, service provision and retail.

Whereas the resort areas of the coastal zone and Kaliningrad experience excessive recreational pressure, the eastern part of the region remains only marginally integrated into tourism and recreation. Despite the selective development of individual facilities in the east of the region, pronounced socio-economic disparities persist between the western and eastern parts. These disparities have deepened the east—west divide in living standards; extremely low unemployment in the west contrasts with high unemployment in the east. In this context, balanced spatial development of the tourism sector is becoming increasingly important, given the excessive anthropogenic pressure in the western agglomeration and the eastern region's lagging socio-economic indicators. At the same time, the region's small size, strong transport connectivity and high levels of car ownership [1], combined with the substantial yet underutilised tourism and recreation potential of the extensive eastern territories [2] and the availability of labour resources [3], create favourable conditions for more active integration of eastern territories into the tourism sector.

The aim of this article is therefore to identify and evaluate the spatial disparities in labour market development of the tourism sector in the Kaliningrad region and, based on this assessment, to propose measures to enhance staffing in districts experiencing labour shortages.

State of research

Several global trends have emerged in the labour market for tourism and recreation. First, the adoption of modern technologies, particularly software, is accelerating, enhancing labour productivity and consequently displacing workers with the lowest qualifications [4; 5]. Second, a principal factor prompting staff to leave the tourism sector is the declining attractiveness of work in the industry, caused by low wages, precarious and short-term contracts, inconvenient working hours, stress, limited career prospects, lack of employment security, poor working conditions and health risks [6—8]. Moreover, the impact of the COVID-19 pandemic on employment in tourism has been more significant than in other sectors [9—11].

A key factor in the development of the tourism sector is the creation of a system for training competitive personnel [10; 12]. Raising the prestige of occupations in tourism and related sectors is also crucial, including through corporate social responsibility initiatives [13; 14]. The national project 'Tourism and Hospitality' prioritises the development of human capital in the sector. In this context, practice-oriented education assumes particular importance. At present, more than 48.7 thousand students are enrolled in 283 universities in programmes related to tourism, of whom almost 36.5 thousand study at universities administered by Russia's Ministry of Science and Higher Education. The employment rate of graduates trained in the service and tourism sector stands at 73.1 %.[1]

Yet another post-pandemic global trend is the burgeoning of domestic tourism, which aligns closely with Russia's policy in the sector [15]. This fosters the integration of new territories into the tourism sector and stimulates the creation of new jobs, which in turn underscores the need to address labour shortages,

[1] The Ministry of Science and Higher Education of Russia Prepared Best Practices in the Field of Tourism Education. Ministry of Science and Higher Education of Russia, 2025, *Ministry of Science and Higher Education of Russia*, URL: https://minobrnauki.gov.ru/press-center/news/obrazovanie/98033/ (accessed 22.08.2025).

including by involving local residents in the industry [16; 17]. At the same time, there remains a shortage of research examining the spatial characteristics of labour market development in the tourism sector.

In the post-pandemic period, Russia's tourism sector is developing against the backdrop of the special military operation in Ukraine and the implementation of Western sanctions. Consequently, the emerging trends in the country have focused on 'creating favourable conditions for developing the nation's potential, engaging Russian citizens in activities to strengthen national unity and preserve spiritual and cultural-historical heritage, promoting intensive development of cultural and educational, business, ecological tourism and cruises, and ensuring a responsible approach to service quality' [18, p. 101].

Since 2021, the labour market has been recovering, driven by a gradual increase in employment in the tourism sector, primarily in commercial lodging facilities [19]. Demand for personnel has also increased, reaching almost 1.5 times the 2020 level by 2022.[1] According to online recruitment platforms, in the first half of 2022, the most in-demand positions nationwide in the hospitality sector were for personnel with secondary vocational education (90.2 %), including bartenders, waiters, baristas, café and restaurant administrators, cooks, sommeliers, hotel administrators (concierges), hotel housekeepers and porters [19]. A recent trend is the lowering of work experience requirements by employers, prompted by the growing staff shortage [20]. It has been noted in the literature that in Russian regions, against the backdrop of rising domestic tourist inflows and an expanding range of services, the labour market in this sector is becoming more competitive and more attractive to qualified specialists [21].

The issue of labour shortages in the Russian economy, particularly in the tourism sector, is being addressed through the implementation of two national projects, 'Personnel' and 'Tourism and Hospitality' [22]. At the same time, researchers note that, given the expected increase in staff shortages, implementing these projects may prove challenging. The expert community recommends closer integration of IT technologies in tourism, creating conditions for the transfer of personnel from other sectors of the economy, such as construction, and facilitating the migration of labour resources and their adaptation, including seasonal and temporary workers, international migrants and compatriots returning from abroad [22]. Special attention is devoted to developing the training system for tourism personnel, particularly in the most labour-deficient areas such as agritourism and ecotourism [23—25].

The tourism sector in the region, one of the most affected during the pandemic [26], has experienced a post-pandemic surge driven by rising domestic demand [14; 27]. The region consistently features in rankings of tourism attractiveness, and its tourism potential is not yet fully realised [28]. Between 2021 and 2024,

[1] Demand for Workers to Fill Vacant Jobs Since 2018, 2025, *Unified Interdepartmental Statistical Information System*, URL: https://www.fedstat.ru/indicator/59086 (accessed 08.09.2025).

the number of commercial lodging facilities (CLFs) and overall accommodation capacity increased, primarily through compact outlets near 'small resort towns, while the eastern part of the region remains underdeveloped in this regard' [27, p. 175]. With the rapid increase in tourist pressure in the western part of the region, leading to a noticeable rise in holiday costs, experts emphasise the need to develop eastern municipalities with tangible tourism and recreation potential, particularly medium-sized towns such as Chernyakhovsk, Sovetsk and Gusev [29]. The main groups of tourists in the region are visitors from other Russian territories seeking leisure and recreation, and this inflow continues to grow year on year.

Today, the labour market in the Kaliningrad tourism sector, as in other Russian regions, is marked by a shortage of personnel. In the exclave, this problem is further exacerbated by the outflow of professionals abroad [30]. However, an undeniable advantage is the region's net migration gain, as newly arriving migrants often undergo labour adaptation in the tourism sector due to its relatively low employment requirements. At the same time, migrants exhibit high entrepreneurial potential, which is realised in the hotel and restaurant business alongside other industries [31].

Methods and materials

This study examines the hotel and food service sector (classified under Section I of OKVED2:[1] Activities of hotels and food service enterprises) as the most prominent group of economic activities within the tourism sector and, at the same time, as directly related to it, unlike transport or trade. Data available from open sources have been used to characterise the labour market situation in the tourism sector (Table 1).

Table 1

Information sources used to assess the labour market in the tourism sector and the corresponding indicators

Indicator	Unit of measurement	Source
Average annual number of workers by type of economic activity under the Labour Resources Balance Sheet	People and%	Unified Interdepartmental Statistical Information System (UISIS)
Average annual workforce across all organisations by type of economic activity	Persons	UISIS
Number of hers and separations by type of economic activity	Persons	UISIS

[1] Translator's note: OKVED2 is the Russian Classification of Economic Activities, in effect since 2014.

The end of Table 1

Indicator	Unit of measurement	Source
Employer-declared demand for personnel submitted to state employment authorities by type of economic activity and by qualification and work experience requirements (as of 1 August)	Persons	Data provided by the Ministry of Social Policy of the Kaliningrad region in response to an official request
Average monthly nominal wages of workers employed in the economy	Roubles	UISIS
Number of legal entities and individual entrepreneurs engaged in hospitality, by municipality	Each	Statistical Register of Economic Entities of the Kaliningrad Region (SPARK-Interfax)
Number of persons accommodated in CLFs by municipality	Persons	Statistical Bulletin of Kaliningradstat: Information on the Activities of Commercial Lodging Facilities in the Kaliningrad Region
Working-age population as of 1 January	Persons	Kaliningradstat
Average annual workforce in organisations of the Kaliningrad region	Persons	SPARK-Interfax

The study period covers the years of rapid development in the tourism sector following the region's recovery from the economic crises of 2015—2016: the pre-pandemic years 2017—2019, the pandemic years 2020—2021, and the years of regional development under the new closed borders conditions, 2022—2024. This timeframe allows for an analysis of how major changes in the country and the region have influenced the labour market situation in the tourism sector and its adaptation dynamics.

Data on employer-declared demand for personnel submitted to state employment authorities were used, both in total and by type of economic activity — specifically, in the hospitality sector — based on figures as of 1 August for 2019—2024. It was important to assess the structure of personnel demand (by occupation and by municipality) outside the high summer season, as vacancies offered during this period were assumed to involve primarily permanent rather than temporary employment. During the summer season, the analysed structure of personnel demand shifts towards increased need for auxiliary staff requiring no specialised skills, such as hotel housekeepers, general labourers, cargo handlers, cleaners, couriers, waiters, security personnel, etc. At the same time, it is essential to acknowledge the limitations of using data on official unemployment and employer-declared demand submitted to state employment authorities, owing to the complexities of obtaining unemployed status, low benefit levels and the specifics of company personnel policies. For instance, individuals cannot be recognised as unemployed if they refuse two suitable job offers, including temporary work, within 10 days. Self-employed individuals are also denied unemployed status. Moreover, Russian employers, particularly during crises, often find it more advantageous to transfer an employee to part-time work or reduce wages rather than terminate employment and thereby add to the labour exchange [32]. Therefore, actual personnel demand in the tourism sector may be higher, making additional qualitative and quantitative studies advisable for its accurate assessment.

Results

Regional labour market in the tourism sector. About 17.2 thousand people are employed in the region's hotels and food service establishments, accounting for 3.3 % of the total employed population. This places the region among the top twelve in Russia by this measure. Even before the nationwide boom in domestic tourism and before the COVID-19 pandemic, this share placed the region fifth among all federal subjects in 2017. Today, only Sevastopol, the Republic of Crimea and Krasnodar Krai, with over 5 %, and the Altai Republic and Astrakhan region, with over 4 %, have a significantly higher share of employment in tourism. The absolute number of those employed in the sector grew at the highest rates in Kaliningrad in 2022 and 2023, increasing by 4—7 % annually.

Data on the average annual workforce in the hospitality sector across all organisations show a 27 % decline in 2024 compared with 2017, a steeper drop than that observed across all organisations in the region (−12 %).

This may be explained by intersectoral labour reallocation towards information technology (+159 %), healthcare (+103 %) and mining (+148 %); by rotational work in other Russian regions (a 2.5—3-fold increase compared with 2021—2022[1]); as well as by transitions into informal or partial employment and self-employment.[2]

Overall, workforce movement in the tourism sector over the study period was significantly less active than across the nation or the Northwestern Federal District (NWFD) — the average proportion of hires and separations relative to the average workforce from 2017 to 2024 was 36 %, compared with 62 % for Russia and 58 % for the NWFD (Fig. 1).

[1] Results of the Labour Force Sample Survey: Rosstat Statistical Report, 2025, *Rosstat*, URL: https://rosstat.gov.ru/folder/11110/document/13265 (accessed 31.07.2025).

[2] UFNS: Federal Tax Service Directorate: About 2,000 Self-Employed People Rent Out Property Legally in Kaliningrad Region, 2024, *Federal Tax Service*, URL: https://www.nalog.gov.ru/rn39/ifns/ob9/info/14780150/ (accessed 31.07.2025) ; The Number of Self-Employed in Kaliningrad Region Has Sharply Increased — Ministry of Finance, 2025, *Klops,ru*, 28.05.2025, URL: https://klops.ru/kaliningrad/2025-05-28/357726-v-kaliningradskoy-oblasti-rezko-vyroslo-chislo-samozanyatyh-minfin (accessed 31.07.2025).

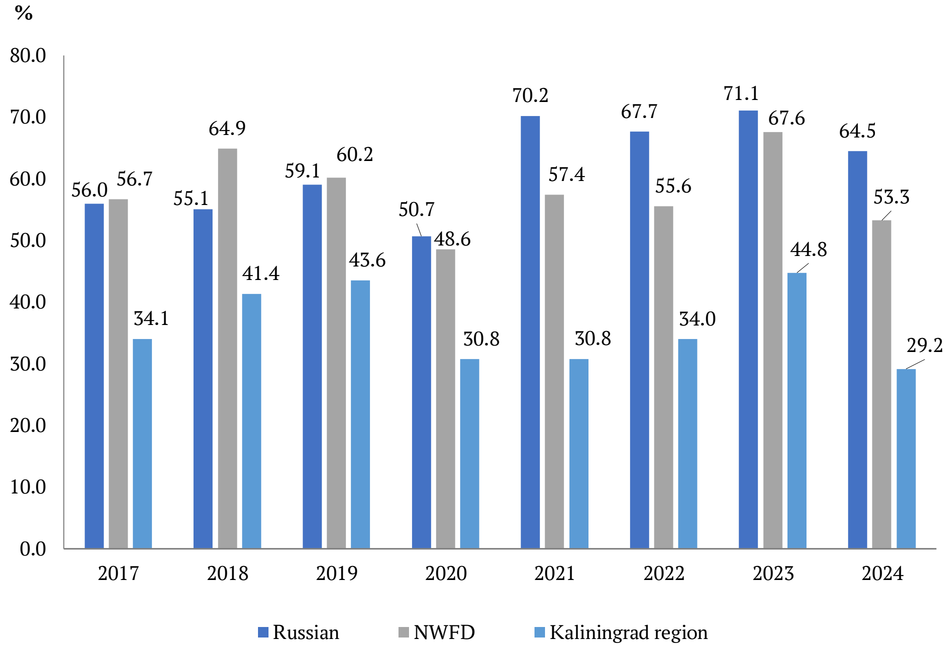

Fig. 1. Hiring and separation rates
in the tourism sector's average workforce, %

The measure fell to its lowest levels during the COVID-19 pandemic, when workforce movement in the sector declined sharply, a pattern also observed in other regions of the country. In the Kaliningrad region, however, this period of reduced workforce mobility has continued — the surge in 2023 cannot be considered a recovery, as it was short-term and driven by an increase in employee departures from the sector. Meanwhile, average figures for Russia and the NWFD show a return to pre-pandemic levels. This may be indicative of two concurrent processes: a significant shortage of labour resources on the one hand, and a lack of interest in employment in the sector on the other. The latter is attributable, firstly, to the fact that the labour rights of workers in this sector were the least secure during the pandemic, leaving them most affected; secondly, to the surge in self-employment and individual entrepreneurship within the sector, which is often more attractive to workers as it offers higher earnings, flexible working hours, and opportunities for remote work — an aspect that has gained increasing relevance in the post-pandemic period.

In the Kaliningrad region's tourism sector, self-employment primarily concerns tour guides. In 2023, 300 tour guides were certified, and as of 1 September 2025, this number had risen to 422, with 240 applications under consideration by the regional Ministry of Culture and Tourism. Most tour guides are not employed directly by tourism companies; they work under service contracts or are self-employed.

Another factor is the ban on the employment of foreign nationals holding work permits in food and beverage organisations from May 2024,[1] which likely contributed to the closure of several food service enterprises.[2]

Analysis of employment structure in the tourism sector shows that nearly three-quarters of employees work in food service outlets (FSOs), reflecting both the numerical predominance of establishments serving visitors and local residents, and the sector's staffing characteristics, which require more service personnel than the hotel industry (Fig. 2, 3). The decline in employment in FSOs despite an increase in the number of establishments is likely explained by the active replacement of staff positions with outsourcing, the adoption of more flexible employment forms (e. g., part-time work), labour-saving technologies and the misuse of self-employment arrangements.

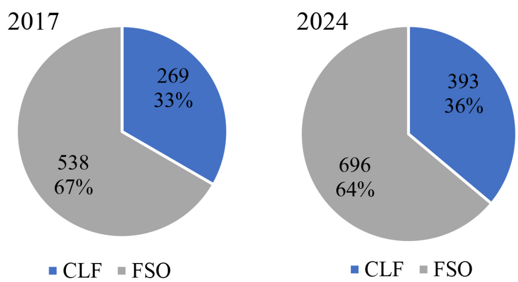

Fig. 2. Number of organisations operating as collective lodging facilities and food service outlets

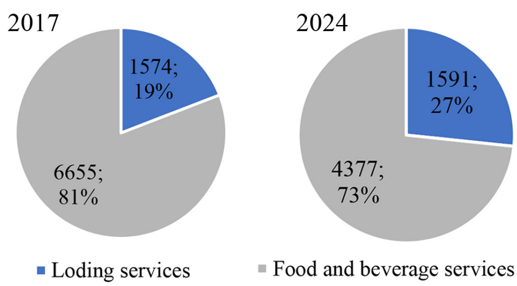

Fig. 3. Average workforce (excluding external part-time employees) across all organisations by type of activity: hotel and food service enterprises in the Kaliningrad region

[1] Ukaz gubernatora Kaliningradskoy oblasti №38-u ot 13 maya 2024 g. [Decree of the Governor of Kaliningrad Region №38-u of 13 May 2024], 2024, *Official Regulatory Act Publications*, URL: http://publication.pravo.gov.ru/document/3900202405140001 (accessed 31.07.2025).

[2] Bez plova i samsy: iz-za zapreta na rabotu migrantov v Kaliningrade zakryvayutsya populyarnye kafe i restorany [No Plov, No Samsa: Popular Cafes and Restaurants Close in Kaliningrad Due to the Ban on Migrant Labour], 2024, *Klops.ru*, 05.09.2024, URL: https://klops.ru/kaliningrad/2024-09-05/303544-bez-plova-i-samsy-iz-za-zapreta-na-rabotu-migrantov-v-kaliningrade-zakryvayutsya-populyarnye-kafe-i-restorany (accessed 31.07.2025).

The observed changes are also reflected in officially reported personnel demand, which declined threefold between 2019 and 2024, to as few as 300 positions (Fig. 4). The structure of demand, however, remained largely unchanged: most positions are for workers with no formal education requirements (55—60 %) and for those with secondary vocational education (35—40 %). One-quarter of vacancies specify work experience requirements. Vacancies for specialists with higher education are rarely posted with the Kaliningrad Regional Employment Centre, which may be explained by direct interactions between employers and regional higher education institutions, employee poaching from competitors and the use of alternative platforms for posting vacancies (for example, hh.ru).

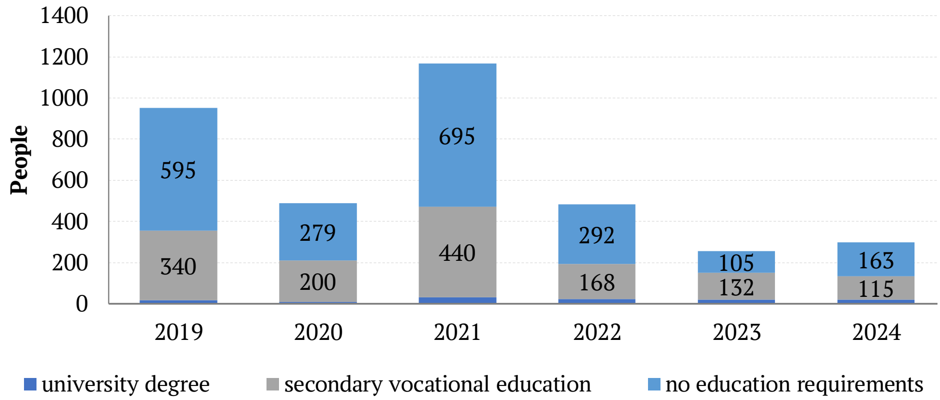

Fig. 4. Employer-declared demand for workers submitted to the Kaliningrad Regional Employment Centre (Section I: Activities of hotels and food service enterprises)

Amid the overall decline in reported personnel demand, a diversification has been observed. As before, the highest demand remains for cooks, bakers, pastry chefs, bartenders and baristas (20 % of reported demand), waiters (16 %), hotel housekeepers (10 %), kitchen staff, general labourers and dishwashers (7 %), and administrators, cashiers and sales personnel (12 %) (Table 2). Together, these categories now account for 59 % of sectoral personnel demand, compared with over 75 % between 2019 and 2023.

Table 2

Employer-declared demand for workers for specific vacancies submitted to the Kaliningrad Regional State Employment Centre (Section I: Activities of Hotels and Food Service Enterprises)

Vacancy	Persons						%					
	2019	2020	2021	2022	2023	2024	2019	2020	2021	2022	2023	2024
Cook, baker, pastry chef, bartender, barista	334	149	346	147	82	59	35.1	30.5	29.6	30.4	32.0	19.8

The end of Table 2

Vacancy	Persons						%					
	2019	2020	2021	2022	2023	2024	2019	2020	2021	2022	2023	2024
Waiter	194	78	284	69	26	48	20.4	16.0	24.3	14.3	10.2	16.1
Hotel housekeeper	69	66	82	50	37	30	7.3	13.5	7.0	10.3	14.5	10.1
General labourer, kitchen worker, dishwashers, cleaners	137	75	160	88	37	21	14.4	15.3	13.7	18.2	14.5	7.0
Salesperson, cashier	37	11	30	22	15	17	3.9	2.2	2.6	4.5	5.9	5.7
Total	771	379	902	376	197	175	81.1	77.5	77.3	77.7	77.0	58.7

Analysis of the hh.ru recruitment platform confirms that as of September 2025,[1] vacancies in the Tourism, Hotels and Restaurants sector are dominated by positions for cook, baker, pastry chef (61 vacancies), waiter, bartender, barista (52), manager (26, including restaurant and tourism managers), cleaner (20), administrator (17) and hostess (6). The overwhelming majority of these vacancies are located in the regional centre (89 %).

The attractiveness of employment in the regional tourism sector has been declining annually in wage terms, as evidenced by the widening gap between the sector's average monthly nominal earnings and the economy-wide average (Fig. 5). Over eight years from 2017, this gap has increased from 30 % to 41 %. A lag is also observed in comparison with the established wage levels in the tourism sector across the NWFD and Russia as a whole, reaching up to a quarter.

Labour shortages in the tourism sector are generally addressed through methods more flexible than seeking assistance from the Employment Centre. First, there is inter-firm mobility. An example is the inflow of personnel, such as waiters and cooks, to the seaside during the high season and back to Kaliningrad in the low season, driven by seasonal differences in workload and, consequently, wages. Employers work closely with vocational education institutions to recruit both graduates and students, typically for full-time employment. Third, for temporary seasonal work, employers broadly recruit local residents through advertisements, including school students and pensioners. Fourth, employers use all available platforms to post job announcements, with hh.ru and Avito considered the most

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[1] Vacancies, Headhunter, URL: https://kaliningrad.hh.ru/search/vacancy?enable_snippets=false&L_save_area=true&area=41&area=1020&industry=50&professional_role=8&professional_role=72&professional_role=74&professional_role=76&professional_role=89&professional_role=94&professional_role=130&professional_role=140&search_field=name&search_field=company_name&search_field=description (accessed 15.09.2025).

effective. Fifth, given the compactness of the region and of the tourism labour market, the professional community maintains active communication and recruits personnel through word-of-mouth referrals. Sixth, high-end employers invest in retaining staff by strengthening brand loyalty and developing incentive systems, thereby reducing employee turnover.

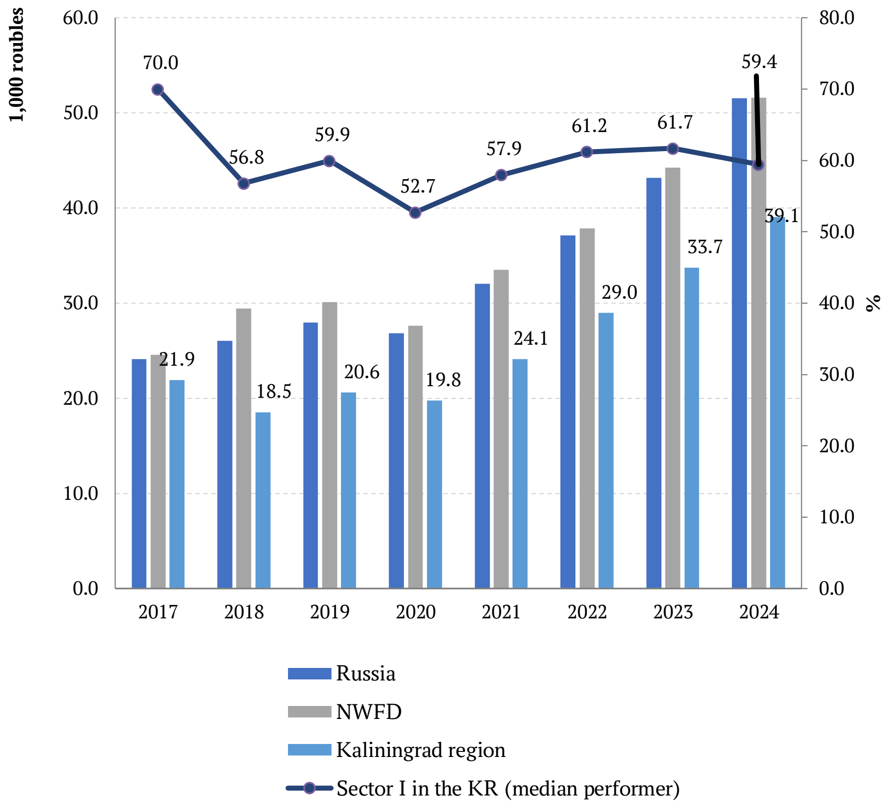

Fig. 5. Average monthly nominal earnings of employees in hotels and food service establishments across all organisations

Overview of tourism development across municipalities. Spatial development of the industry at the municipal level is shaped, on the one hand, by population size and available labour resources and, on the other, by tourist inflows (Table 3). According to 2024 data, the highest ratio of guests accommodated in CLF to working-age residents was recorded in the Svetlogorsk urban district (UD) and the Zelenogradsk municipal district (MD) — over 9.0 persons compared with the regional average of 1.6 — followed by Yantarny (6.0) and Kaliningrad (1.7). Secondary municipalities by these indicators include the Polessk MD (1.3), Baltiysk and Pionersky UDs, while the remaining municipalities experience minimal tourist pressure. Remarkably, in several municipalities, this load has increased substantially compared with 2017 — most notably in the Guryevsk MD (fivefold), the Baltiysk UD (almost fourfold), and the Zelenogradsk MD (2.5-fold).

Table 3

Indicators of the spatial distribution of the tourist industry in the Kaliningrad region

Municipalities	Number of guests accommodated in CLFs per WA resident, persons				Share of the population in the WA group as of 1 January, %				Spatial distribution of organisations in the tourism sector, %				Spatial structure of lodging capacity in CLFs, %				Spatial structure of seating capacity in FSOs, %			
	2017	2024	2024	2020	2021	2022	2023	2024	2017	2019	2021	2022	2023	2024	2017	2019	2021	2022	2023	2024
Leaders	1.7	2.7	58.7	73.8	74.9	73.9	73.0	73.1	81.7	82.5	82.5	82.2	80.7	80.0	60.0	59.6	60.7	59.2	58.9	60.1
Kaliningrad	1.3	1.7	58.7	62.6	62.9	61.7	60.5	60.7	41.8	40.8	40.1	37.5	37.0	35.5	43.5	42.9	42.3	41.6	41.1	41.6
Svetlogorsk	9.5	12.0	55.7	4.6	4.6	4.4	4.4	4.3	23.2	23.1	22.7	23.5	22.8	22.0	7.8	8.2	9.0	9.0	9.3	9.2
Yantarny	3.9	6.0	64.2	0.9	1.0	1.0	1.0	1.1	1.6	1.4	1.7	2.5	2.7	2.9	1.7	1.6	2.5	2.4	2.5	2.6
Zelenogradsk	2.8	9.5	58.5	5.7	6.4	6.8	7.1	7.1	15.2	17.2	17.9	18.7	18.1	19.6	7.0	6.9	7.0	6.1	6.0	6.7
Runners-up		1.0	58.1	4.6	4.7	4.5	4.7	4.7	3.6	4.2	5.0	4.5	5.4	5.5	6.8	7.1	6.8	6.6	6.8	6.6
Baltiysk	0.2	0.8	59.6	1.9	1.8	1.8	1.9	2.0	1.2	1.6	1.9	1.7	2.0	2.3	2.9	3.1	2.9	2.9	2.9	3.0
Pionersk	0.8	0.9	55.4	1.6	1.8	1.7	1.7	1.6	2.3	2.0	2.2	1.6	1.5	1.6	1.8	1.8	1.5	1.3	1.5	1.5
<u>Polessk</u>	K	1.3	57.6	1.2	1.2	1.1	1.1	1.1	K	0.5	1.0	1.2	1.8	1.6	2.1	2.1	2.4	2.4	2.4	2.0
Laggards			60.1	21.6	20.5	21.6	22.3	22.2	13.3	16.5	12.5	13.3	13.9	14.5	33.1	33.3	32.5	34.2	34.3	33.2
Gusev	0.3	0.3	61.6	0.8	0.9	1.0	1.3	1.2	1.5	1.6	1.1	1.1	1.1	0.9	3.3	3.3	3.2	3.4	3.4	3.4
Ladushkin	K	0.0	55.9	0.3	0.4	0.3	0.2	0.1	K	0.0	0.0	0.0	0.0	0.0	0.5	0.5	0.5	0.5	0.5	0.5
Mamonovo	0.0	0.0	59.9	0.1	0.2	0.2	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.4	0.4	0.2	0.4	0.4	0.4
Svetly	0.1	0.2	58.6	2.2	2.3	2.2	2.2	2.3	1.8	3.1	1.4	1.8	1.7	1.7	2.4	2.4	2.0	2.0	2.0	2.0
Sovetsk	0.3	0.4		1.7	1.6	1.8	1.8	1.8	2.7	2.7	2.1	1.7	1.4	1.6	3.9	4.7	4.6	4.5	4.5	4.4
Bagrationovsk	0.2	0.2	59.5	1.4	0.9	0.8	1.0	1.0	1.4	1.0	1.0	0.7	0.7	0.7	1.6	1.3	1.2	1.2	1.2	1.2
<u>Gvardeysk</u>	0.3	0.3	60.6	1.8	1.8	1.8	1.8	1.5	0.5	0.9	0.7	0.7	0.8	0.9	3.0	3.5	3.2	3.2	3.3	3.3
<u>*Guryevsk*</u>	0.1	0.6	62.6	8.2	7.6	8.8	8.6	8.8	3.8	4.8	4.9	4.7	4.4	4.6	5.7	5.9	6.7	6.7	6.7	6.6
Krasnoznamensk	0.0	K	58.0	0.4	0.4	0.2	0.3	0.3	0.0	K	K	K	K	K	1.1	1.1	1.1	1.1	1.1	1.1
Neman	K	0.6	54.0	0.4	0.3	0.3	0.5	0.4	K	K	K	1.0	2.4	2.4	1.2	0.0	0.0	1.8	1.7	1.7
Nesterov	K	0.3	57.4	0.4	0.4	0.4	0.4	0.3	K	1.1	0.1	0.6	0.6	0.8	1.9	1.8	1.9	1.8	1.8	1.1
Ozersk	0.0	K	58.1	0.4	0.3	0.3	0.3	0.4	0.0	0.0	K	0.0	K	K	0.0	1.1	1.1	1.1	1.1	1.0
<u>Pravdinsk</u>	K	0.0	57.9	0.5	0.8	0.9	1.0	1.0	K	K	K	0.0	0.0	0.0	1.3	1.2	1.3	1.2	1.3	1.3
Slavsk	0.0	K	57.7	0.6	0.4	0.5	0.4	0.5	0.0	0.0	0.0	0.0	K	K	1.4	0.9	1.0	0.8	0.8	0.8
Chernyakhovsk	0.2	0.3	58.6	2.3	2.2	2.1	2.2	2.4	1.6	1.2	1.3	1.0	0.9	1.0	5.4	5.1	4.5	4.5	4.4	4.5
Regional average	1.0	1.6	59.2	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Comment: FSO stands for food service outlet, and WA for working age. Spatial zones according to Gennady Fedorov [33]: **regional centre**, *inner suburban zone*, <u>outer suburban zone</u>, periphery. K indicates that the data are not published by Kaliningradstat to ensure the confidentiality of raw statistical data obtained from organisations under federal law No. 282-FZ On Official Statistical Recording and the System of Public Statistics in the Russian Federation (Para. 5, Article 4; Para. 1, Article 9).

Municipalities in the first group, which comprises the leaders — the resort districts of Svetlogorsk, Zelenogradsk and Yantarny and the regional capital, account for about 73 % of the region's hospitality organisations. Although their combined share remained unchanged between 2020 and 2024, the proportion and number of legal entities and individual entrepreneurs in Kaliningrad and the Svetlogorsk district fell by 3—6 %, whereas the Zelenogradsk and Yantarny districts recorded a rapid growth of more than 20 %. In the distribution of CLF lodging capacity, these municipalities account for an even larger 80 %, and although this share declined slightly over the four years in favour of municipalities less involved in servicing tourists, the Yantarny district recorded a twofold increase in CLF capacity and the Zelenogradsk district a 127 % increase, which added to their respective shares. The group of leading municipalities consistently accounts for about 60 % of the region's total FSO seating capacity; however, between 2017 and 2024, seating capacity shifted in favour of the Svetlogorsk and Yantarny districts, while the share of the regional capital declined slightly from 43.5 % in 2017 to 41.6 % in 2024.

The share of municipalities in the second group, which consists of the *runners-up* — the Baltiysk, Pionersky and Polessk districts, is very small, amounting to no more than 5 % of all hospitality organisations. A slight positive trend in the number of economic entities was observed only in the Baltiysk district. In terms of lodging capacity, the share of these municipalities increased modestly to 5.5 % by 2024, mainly due to the Polessk and Baltiysk districts, with an almost fourfold rise in CLF capacity in the former and more than a twofold rise in the latter. The share of municipalities in this group within the spatial structure of seating capacity is slightly higher, at 6.6 %.

Despite the relatively low tourist load per working-age resident in the remaining *lagging* municipalities, the Guryevsk district stands out with a notable share of registered organisations in the sector (almost 9 %). The municipality does not play a significant role in meeting tourist demand, while its high working-age population reflects its suburban location and, consequently, the industrial and transport specialisation of its economy. Owing to the district's rapid population growth during the last intercensal period, both the number of FSO seats and the district's share in this figure increased by 27 % and 0.9 percentage points, respectively. The Neman and Gvardeysk districts can also be noted, where rapid growth in the number of CLF places (fivefold in Neman) and in FSOs has led to a significant increase in these municipalities' contribution. Other municipalities primarily showed a reduction in seating capacity against the backdrop of population decline.

A trend of the past five years, from 2020 to 2024, has been the increase in the share of individual entrepreneurs in the tourism sector from 58 % to 64 %. In the leading municipalities, this increase exceeded the regional average, although the share of individual entrepreneurs there remains lower than in other districts.

Labour market in the tourism sector at the level of municipalities. Employment in the tourism sector, averaging 2.2 % across all organisations in the region, exceeds this level only in the Zelenogradsk district, where it reaches 3.0 %. In the Svetlogorsk district, the share of employees in large and medium-sized organisations in the sector is 2 %. More comprehensive data on employment from the SPARK-Interfax database, which aggregates information from entities of various sizes, confirm a higher level of working-age population engagement in hospitality compared with the regional average in the Svetlogorsk and Zelenogradsk districts, as well as in the regional capital (Fig. 6, 7). Notably, the peripheral Krasnoznamensk district also exhibits a relatively high value — 101 % of the regional average — while the other runner-up municipalities lag by more than 70 %.

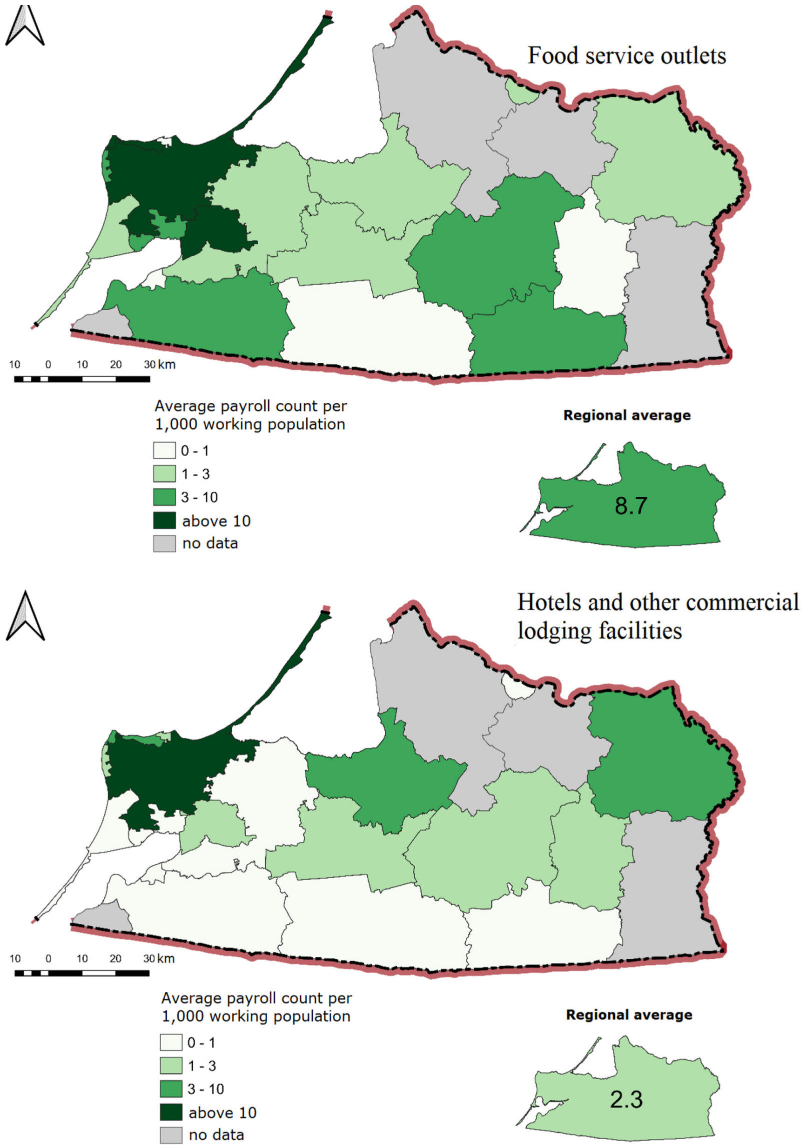

Fig. 6. Number of employees in tourism organisations as of 2023

Calculated based on data from the SPARK-Interfax database.

According to SPARK-Interfax data, almost half of all hotels and other lodging facilities in the region are located in the city of Kaliningrad. However, since 2020, this share has fallen by 5 percentage points, despite an absolute increase in the number of operating entities. By contrast, the share of the Zelenogradsk district increased over this period, reaching 21.7 % in 2024 compared with 15.4 % in 2020. Noteworthy is the rising contribution of the runner-up municipalities to the distribution of employees in accommodation facilities: their share doubled from 1.6 % in 2020 to 3.2 % in 2024. The share of laggard municipalities also increased (from 17 % in 2020 to 19 % in 2024), primarily due to the suburban Guryevsk district and the Svetly municipality, as well as the more remote Sovetsk and Krasnoznamensk districts.

By the level of working-age population engagement in the operations of hotels and other lodging facilities, seven out of twenty-two districts exceed the regional average: Zelenogradsk, Svetlogorsk and Krasnoznamensk by more than fourfold, and Kaliningrad, Yantarny, Pionersky and Polessk by up to 50 %. Data on employment in CLFs (weighted by the average annual number of working-age residents), which capture small and micro-enterprises, likewise show values above the regional average for the Svetlogorsk district (twentyfold — 163 employees per 1,000 working-age residents) and the Zelenogradsk (5.5-fold), Pionersky and Yantarny districts (2.5—3-fold). Importantly, relative CLF employment grew most markedly in the Zelenogradsk district, more than doubling compared with 2019. In these municipalities, the hotel industry plays a crucial role in ensuring local employment.

The spatial distribution of FSO employment is more clustered: roughly 80 % of all sector employees work in the regional capital, reflecting that food services cater not only to tourists but also to local residents. The most notable increase in food-service employment occurred in the laggard municipalities, raising their combined share from 8.6 % in 2020 to 9.5 % in 2024. In the Gvardeysk, Bagrationovsk and Chernyakhovsk districts, growth exceeded 100 %. Remarkably, by 2024, the Chernyakhovsk district surpassed the coastal resort of Svetlogorsk in the number of FSO employees, whereas in 2020 it lagged by more than 35 %. At the same time, relative indicators of working-age engagement in food-service organisations show consistently high and rising levels only in Kaliningrad and the Svetlogorsk and Zelenogradsk districts, from 50 to 80 % above the regional average. Chernyakhovsk displays a sharply rising trend, from 36 % of the regional average in 2020 to 72 % in 2023.

The main demand for personnel in the tourism sector is concentrated in the regional capital (Table 4), where the majority of key tourism enterprises are located. In addition, large organisations operating in other municipalities are often officially registered here (a prime example is the Fishdorf country retreat located in the Polessk district). The regional capital accounted for between 30 % (2023) and 66 % (2019) of all personnel demand reported to state employment authorities. The share of other leading municipalities in the coastal zone also fluctuated, with Zelenogradsk accounting for 1—12 %, Svetlogorsk 6—20 % and Yantarny 1—6 %. It is noteworthy that hospitality establishments constitute a substantial share of total vacancies in municipalities of the inner suburban zone (Polessk) and in the eastern peripheral districts comprising medium-sized towns (Chernyakhovsk, Gusev and Sovetsk). In these latter three districts, the number of vacancies has grown significantly, with overall personnel demand doubling. By 2024, the Gusev and Chernyakhovsk municipalities accounted for more than 10 % of the region's total demand in the sector.

Table 4

Demand for personnel in the tourism industry, as reported by employers to the Kaliningrad regional state employment services

Municipality	Vacancy structure by municipality, %							Share of sectoral vacancies in total personnel demand, %				Market tightness, unemployed-to-vacancy ratio (total)			
	2019	2020	2021	2022	2023	2024	2019—2024, average	2021	2022	2023	2024	2021	2022	2023	2024
Leaders															
Kaliningrad	66.1	42.7	65.7	57.1	30.1	52.5	*52.4*	6.2	4.5	1.1	2.1	0.3	0.4	0.2	0.1
Svetlogorsk UD	7.2	19.4	6.3	8.1	13.7	14.8	*11.6*	12.4	12.7	15.6	8.8	0.2	0.2	0.2	0.1
Zelenogradsk MD	6.1	5.7	11.7	10.0	5.1	1.3	*6.7*	11.9	7.2	2.6	0.5	0.2	0.1	0.1	0.1
Yantarny UD	6.3	6.5	1.6	1.5	3.1	3.0	*3.7*	8.5	11.7	8.7	7.3	0.1	0.3	0.1	0.0
Runners-up															
Baltiysk UD	0.0	0.0	1.4	0.0	0.0	0.0	*0.2*	1.8	0.0	0.0	0.0	0.3	0.3	0.1	0.1
Pionersky UD	3.2	5.3	0.9	0.0	0.0	0.0	*1.6*	3.1	0.0	0.0	0.0	0.3	0.2	0.2	0.1
Polessk MD	2.7	2.7	2.1	3.6	4.7	0.0	*2.6*	10.5	16.0	11.0	0.0	0.7	0.7	0.5	0.4
Laggards															
Gusev UD	1.1	2.7	1.0	0.4	7.4	11.4	*4.0*	1.9	1.3	3.9	6.7	0.5	1.3	0.3	0.2
Svetly UD	0.6	2.9	0.9	2.6	0.4	3.4	*1.8*	1.4	2.5	0.4	1.6	0.3	0.4	0.3	0.1
Sovetsk UD	0.7	0.2	1.0	0.6	11.3	1.7	*2.6*	2.6	2.3	7.2	1.2	0.7	1.3	0.3	0.1
Bagrationovsk MD	0.6	0.4	0.2	0.2	0.8	0.0	*0.4*	0.4	0.2	0.5	0.0	0.9	0.5	0.4	0.2
Gvardeysk MD	0.0	0.0	0.0	0.0	5.5	0.0	*0.9*	0.0	0.0	3.6	0.0	0.5	0.8	0.4	0.3
Guryevsk MD	3.3	5.9	5.3	12.6	4.7	0.7	*5.4*	6.6	7.3	2.4	0.3	0.6	0.3	0.3	0.1
Neman MD	0.1	0.0	0.2	0.0	1.2	0.0	*0.2*	1.3	0.0	1.6	0.0	1.8	5.6	0.6	0.2
Pravdinsk MD	0.1	0.0	0.1	0.0	0.0	0.0	*0.0*	0.4	0.0	0.0	0.0	0.9	1.6	0.6	0.5
Chernyakhovsk MD	1.9	5.5	1.7	3.2	12.1	11.1	*5.9*	2.8	5.0	4.7	4.8	0.8	1.3	0.5	0.3
Total	100.0	100.0	100.0	100.0	100.0	100.0		5.0	4.4	2.0	2.1	0.4	0.5	0.3	0.2

Comment: spatial zones according to Gennady Fedorov [33]: **regional centre**, *inner suburban zone*, outer suburban zone, periphery.

Conclusion

At the regional level, several trends can be observed in the employment structure of the tourism sector. First, labour demand is diversifying, with a predominance of occupations that do not require high qualifications. Second, requirements for job seekers are decreasing in terms of both educational level and work experience. Third, hiring dynamics in tourism and the decline in vacancies reported to state employment services, against the backdrop of growing tourist flows, indicate the spread of flexible recruiting practices in the sector and the absence of statistical data on labour shortages. Fourth, the wage gap for tourism workers is widening, both relative to the regional average and in comparison with remuneration levels in the tourism sector in other regions of Russia and the Northwestern Federal District.

The spatial organisation of the labour market in the Kaliningrad region's tourism sector reflects a gradual shift in employment towards territories poorly integrated into the industry. These include, primarily, runner-up municipalities (the coastal Pionersky and Baltiysk districts and the Polessk municipality), the rapidly developing Chernyakhovsk district in the east, as well as the near and outer suburban zones of the regional centre (the Svetly, Bagrationovsk and Gvardeysk districts). This is achieved mainly through the development of the food service sector, while the engagement of the working-age population in formal employment in the hotel industry remains low. Demand for labour in the hospitality industry is gradually increasing due to the implementation of projects aimed at creating tourism and recreation facilities, which underscores the need for adequate and timely measures to minimise risks and threats.

Supply and demand in the tourism labour market are balanced within an already established sector, where the main facilities have been operating for more than ten years. Another important factor is the region's spatial compactness, with tourism facilities concentrated in the coastal area and the regional capital. This fosters interactions within the professional tourism community when balancing employment needs during high and low seasons.

Staffing shortages in the region's leading tourism and recreation hubs are addressed through educational programmes offered by higher education institutions and secondary vocational schools. Most of these programmes are practice-oriented, include workplace training in service and tourism enterprises, and involve industry practitioners from various fields and specialisations as faculty.

The potential of the runner-up municipalities could be unlocked by attracting local residents to positions that do not require specialised education or work experience, by developing workplace learning environments and involving tourism businesses in training provision, and by reviewing and adjusting vocational curricula to labour market needs, including those of the service and hospitality sector. It is advisable to introduce training in the most sought-after occupations, such as cook, baker, hotel housekeeper, waiter, and administrator to meet the growing demand for personnel in the eastern part of the region. To this end, existing vocational education infrastructure in Chernyakhovsk, Gusev and Sovetsk can be used, with the participation of relevant stakeholders. Development of vocational education in these areas should be accompanied by school-level career guidance initiatives, including the establishment of specialised classes. This is particularly important given the elevated unemployment levels in the eastern part of the region, including in neighbouring and nearby municipalities.

The demand for unskilled labour should be addressed by re-equipping and upgrading tourism facilities with new technologies and technical solutions, including artificial intelligence, smart home systems and process automation. This applies to positions such as general labourers and kitchen staff, delivery service workers and taxi drivers.

The problem of informal employment in the tourism sector can be mitigated through measures designed to cultivate favourable perceptions of formal employment and unfavourable perceptions of informal work. These measures include public information campaigns, incentives for compliant employers, such as tax benefits, subsidies, other financial support or exemption from inspections, as well as penalties for individuals engaged in business or professional activity without formalised employment — substantial fines for both employees and employers. The full range of measures should apply to all types of economic activity, while sector-specific measures for tourism may include: 1) restricting landlords' access to aggregators and online platforms listing private accommodation, including Avito, Sutochno.ru and Ostrovok.ru, without formalising their status; 2) raising the prestige of occupations such as waiter and cook; 3) providing incentives for compliant employers in tourism and hospitality, such as professional skill competitions (Hospitality Talent), and financial support instruments.

The labour market analysis for the region's tourism sector, taking into account the spatial organisation of tourism and recreation, suggests the following conclusions: 1) the labour market is fully developed and has a certain capacity (12.5 thousand people officially employed in tourism); 2) flexible employment arrangements are used in the service and tourism sector, particularly for frontline staff (seasonal work, part-time work, student employment); 3) staff turnover occurs along the Kaliningrad—coastal zone trajectory, with movement towards the coast during the high season and back during the low season; 4) due to the concentration of hospitality enterprises in Kaliningrad and the coastal resorts, highly qualified personnel are concentrated there, while the eastern part of the region and other peripheral areas rely on lower-qualified specialists, with local residents and individuals without specialised education increasingly involved in tourism and recreation services, their professional training provided by enterprise management.

Amid continuous growth in tourist arrivals to the region, a major project — the new resort Belaya Duna — has been planned within the federal programme Five Seas and Lake Baikal, alongside several other regional tourism initiatives. According to the federal tourism scheme for the Russian Baltics macro-territory, the estimated staffing shortage amounts to 2,500—2,700 workers across different qualification levels. A comprehensive workforce development programme for the service and tourism sector is therefore required. It should encompass increasing enrolment in relevant programmes at regional universities and vocational schools; organising and delivering professional training and retraining through educational institutions in line with assessed labour needs for new tourism projects; involving the tourism industry in workforce training within hospitality enterprises, with subsequent job placement for trainees; and ensuring that public authorities implement a favourable migration policy to attract personnel to the sector.

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