

RMAA

Travel
Marketing

RUSSIAN TRAVEL MARKET DIGEST

Reflection 2023,
Prospects 2024



Digest Highlights

In 2023, the Russian travel market continues its transformation, adapting to changing conditions and sanctions: tourists seek new destinations, experiences, and modes of exploration. The role of inbound tourism has grown, but outbound sector also increases pace of development.

Turkey still maintains its leadership in the number of travelers from Russia among far abroad countries, twice exceeding the rates of UAE and Thailand. There is also a noticeable increase interest in near abroad destinations.

Due to the rapidly changing political situation, the tourism industry is expected to experience a state of stable instability in the coming months. However, there are also positive changes in the market, which you can learn more about in the latest issue of the travel market digest.

Enjoy your reading!



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INSIGHTS 2023

RUNET NUMBERS

SEARCH ENGINES

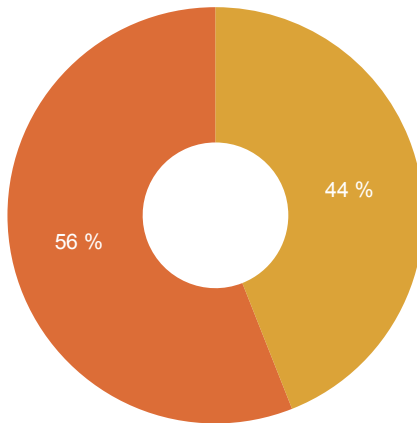
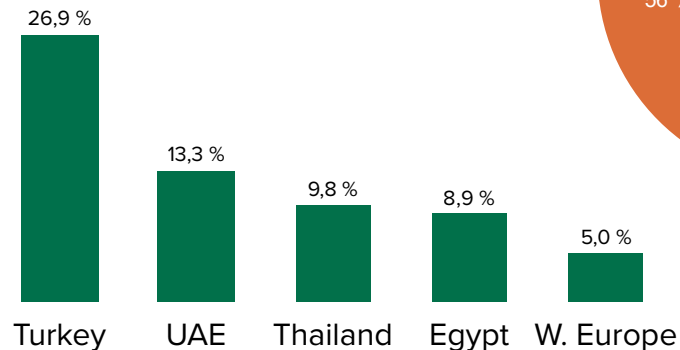
YOUTUBE OVERVIEW

NEW SERVICES

Russian Outbound Tourism Market, 2023

● Near Abroad ● Far Abroad

The share of Russian tourists abroad,
% of population

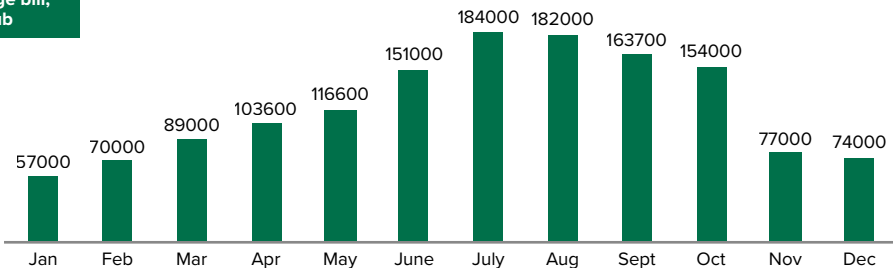


21 million

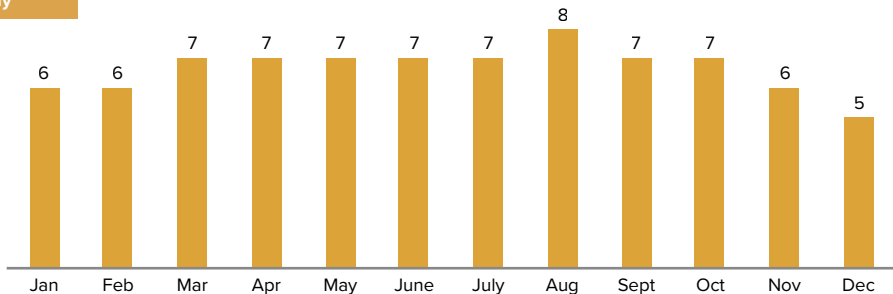
abroad trips Russians made
in Jan — Sep 2023.
This is 20% more than in
2022.

The impact of the seasons on travelling to Turkey

average bill,
rub



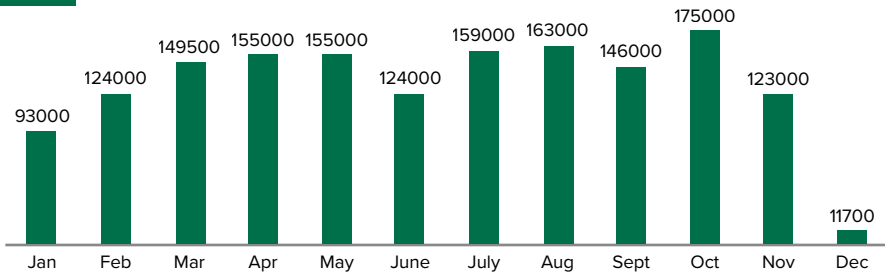
tour duration,
day



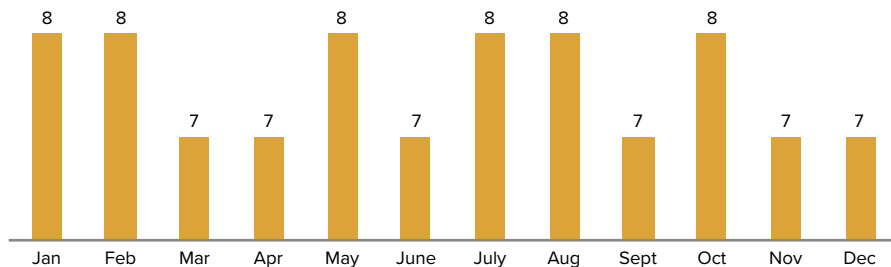
The average bill, together with the tour's average duration, rises in the months of high summer demand and declines in the mid-season, reaching a minimum in winter when trips to Antalya are replaced by short tours to Istanbul.

How currency fluctuations affect tours to Egypt

average bill,
rub



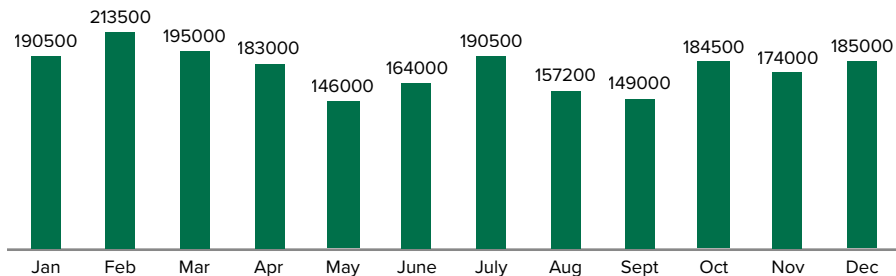
tour duration,
day



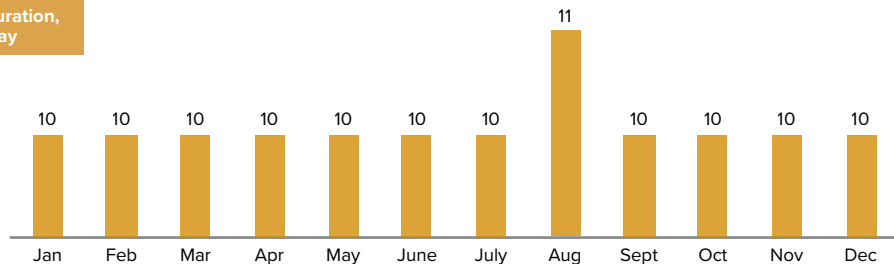
Egypt is traditionally considered a “winter” destination. However, in the summer months of 2023, especially in July and August, the average bill did not decrease significantly. Demand remained high due to a certain outflow of the general audience from other destinations, which had become more expensive. Thus, the dependence of the average tour bill on the price of a tour to Egypt was not significant. Also, the dependence of a tour to Egypt on seasonality is indirect.

The average bill of a Thailand tour is insensitive to exchange rates

average bill, rub



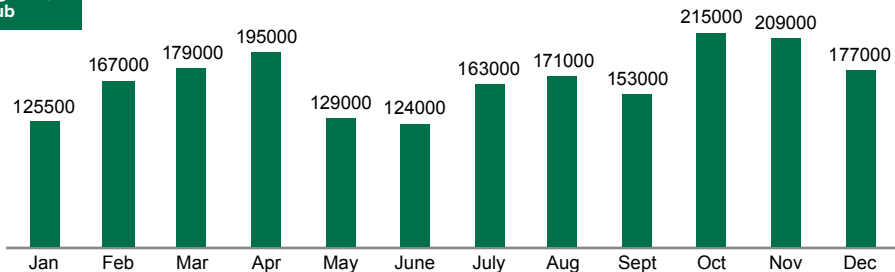
tour duration, day



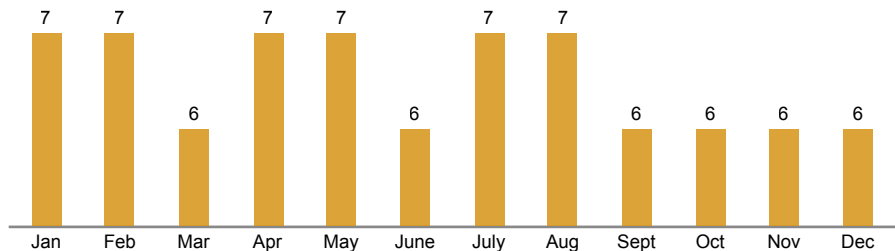
Thailand shows the classic dynamics of the average tour bill: growth in the winter months and a decline in the summer. In 2023, the average receipt (i.e. holiday spending) in Thailand depends not on the exchange rate (the average tour receipt in autumn and December, when the dollar exchange rate is high, is lower than in January-April, when the exchange rate was much better), but on the volume of transportation and the continuing seasonality.

Factors affecting travelling to the UAE

average bill,
rub



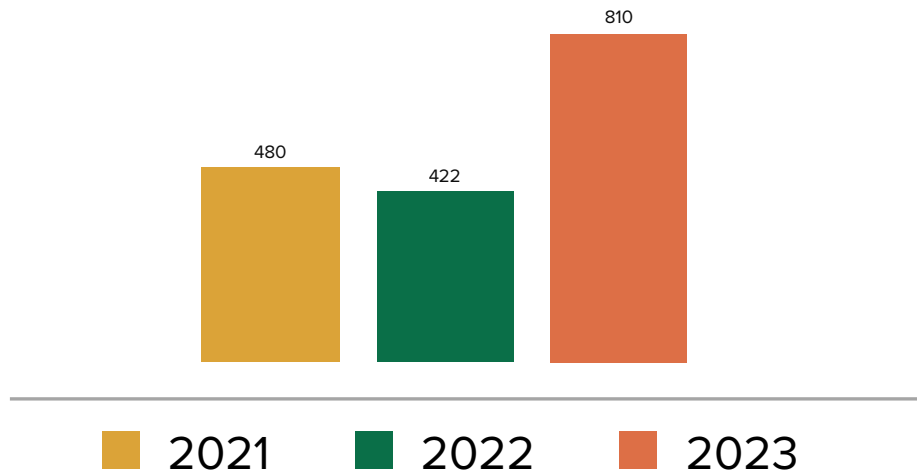
tour duration,
day



Demand for the UAE is stable, with the average tour cheque falling in winter. Declines in the flow of tourists from Russia occur in spring and autumn. Everything depends on the seasonality of demand, the volume of traffic, prices for regular transport and the exchange rate.

Russian Business Tourism Market Year Turnover

2021, 2022, 2023 comparison (rub)

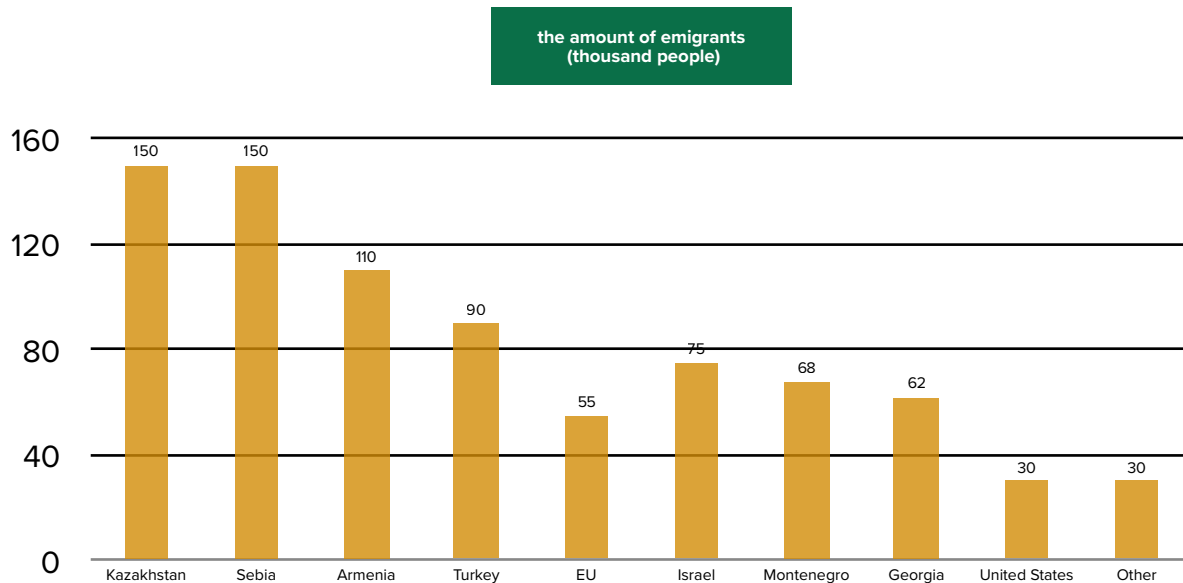


The Russian business
tourism market has grown
on

16%

in Jan — Sep 2023 in
comparison with 2022.

Emigration Estimates from Russia to other countries Feb 2022 - July 2023



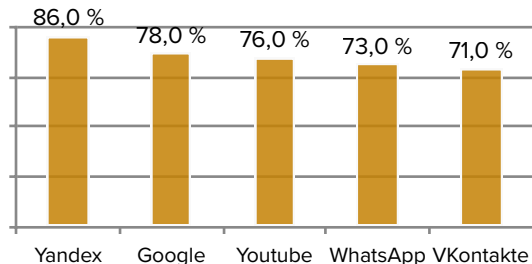
Also the share of emigrants from Russia should be taken into account which amounted about 820-920 thousand people by the summer of 2023.

Changes in Tourism

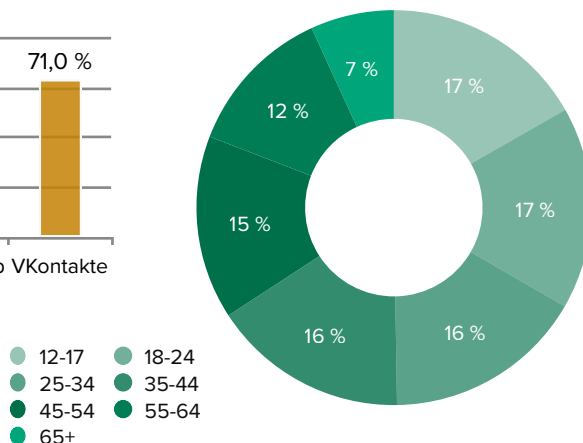
- Increase in air traffic compared to 2022. Currently, 36 countries can be travelled to by direct flights from Russia. The deficit has been replaced by a surplus. As a result, air ticket prices have fallen by an average of 15-20%.
- Destinations such as Turkey, the UAE, Egypt and Thailand have traditionally been among the most popular countries for tourist trips among Russians.
- The rise in prices for tours abroad provoked a decrease in the budget tourist segment. As a result, a serious reduction happened in the share of family tourism.
- Fall in sales for 3-star service and increase in the premium/luxury segment (4-5 stars). At the same time, Russian tourists are ready to pay extra to tour operators and travel agents for additional comfort: business class, individual transfers, business lounges, individual excursions and other such services.
- While in 2022 about 60 % of outbound destinations tourists applied to tour operators, this amount increased up to 80 % in 2023. This trend is related to the restriction of payment instruments for Russian tourists.

Russian Internet, 2023

TOP-5 online services, % of population

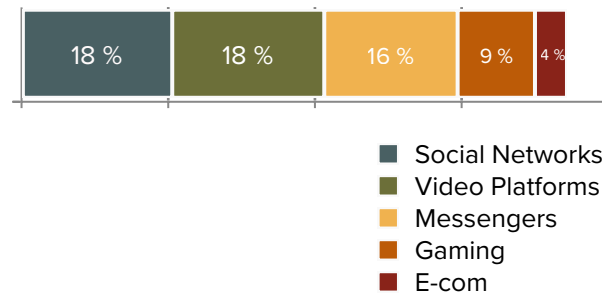


the coverage by age, % of population



Online promotion in the travel tourism industry is the key to effective marketing, providing huge audience reach and precise targeting. By using digital channels, we can analyse the preferences and behaviour of potential customers in detail, and respond instantly to changes in market dynamics.

popular topics, % of population

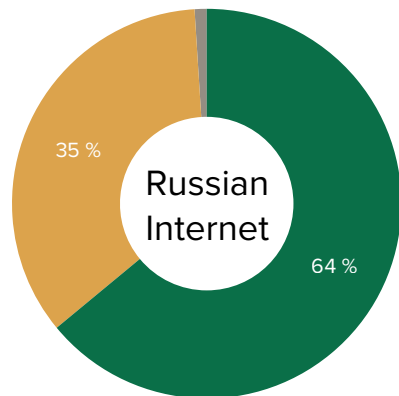


98.6 million internet users per month in Russia

81% of the population

The main requests on search engines

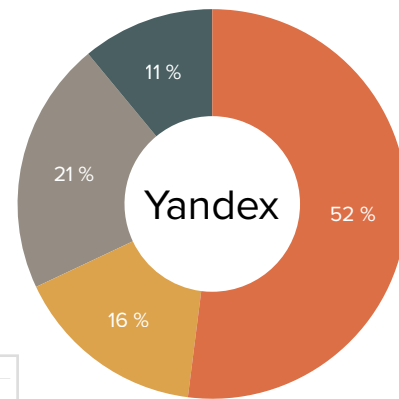
● Yandex ● Google ● Others



The number of search queries in the Travel category increased by 5% in January-September 2023 compared to the same period in 2022 for Yandex



● Hotels ● Air Tickets ● Others ● Tours



The topic travelling in Russian-language Google search was in the leading positions in 2023. The dynamics of popularity was minimal in February (65 points), the highest point (100 points) was noted in July. The most popular search topics and search queries were air and rail ticket categories, transport company websites, destinations, holidays 2023, etc.

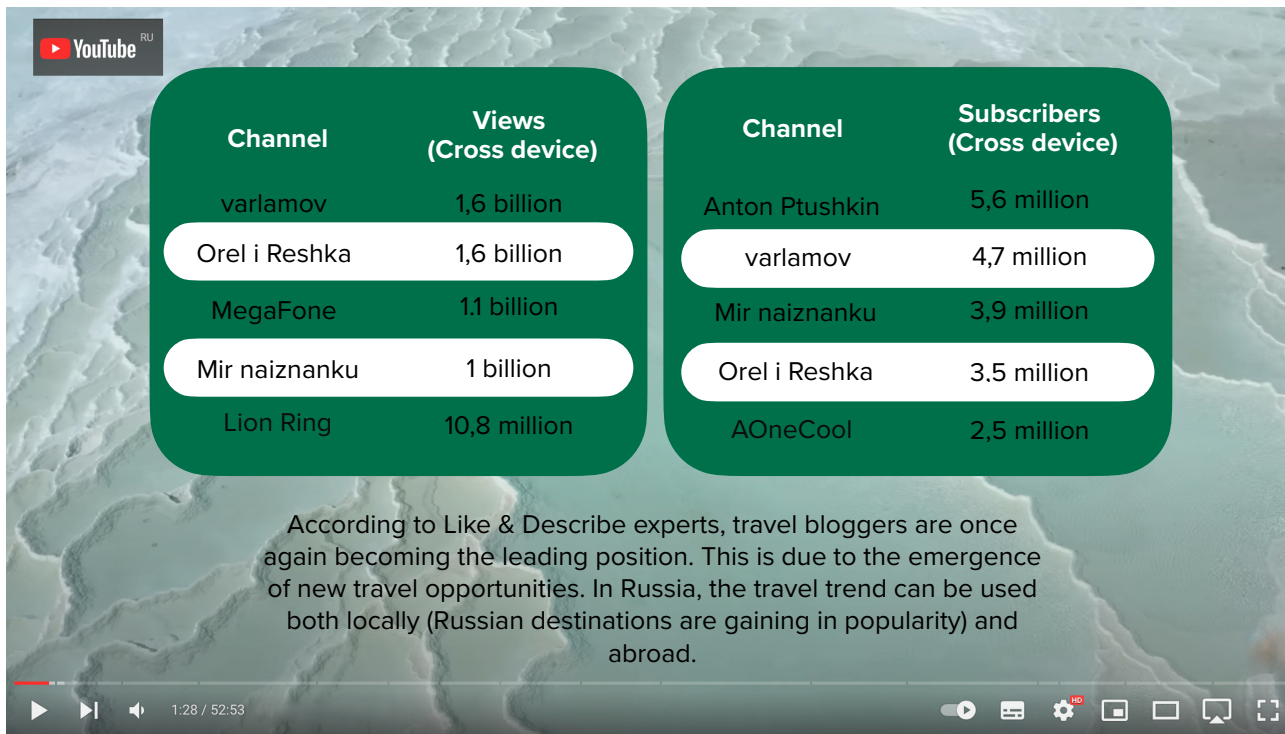
TOP-10 Travel and Tourism Internet Resources in Russia



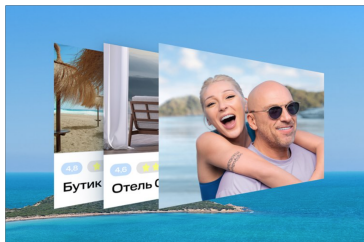
The top 10 popular travel resources in Russia include services for independent travellers, which offer to buy air and rail tickets, choose a hotel, book a tour or all at once.

Name of website	Monthly Visits (Cross device)
tutu.ru	26.4 million
rzd.ru	20,8 million
aviasales.ru	16.8 million
travel.yandex.ru	15,2 million
ostrovok.ru	10,8 million
aeroflot.ru	7 million
s7.ru	5,3 million
sutochno.ru	5,2 million
tourister.ru	4.6 million
kudikina.ru	3,2 million

TOP-5 YouTube Travel Bloggers in Russia

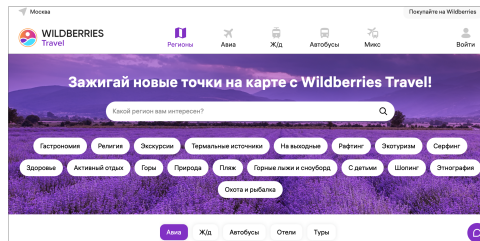


New travel services in Russia 2023 (case studies)



MTS Travel

Wildberries Travel



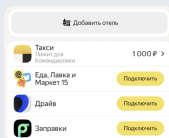
In 2023, new online travel services appeared on the Russian market. The interesting thing is that these platforms provide services not only for travelling within the country, but also for international trips.

Mobile operator MTS launched an extensive advertising campaign for the MTS Travel service, attracting celebrities such as actor Dmitry Nagiyev and blogger Nastya Ivleeva. At the same time, popular Russian E-commerce platform Wildberries unveiled its new service called Wildberries Travel, where users can buy tickets or rooms or tours. In 2023, Yandex focused on business travel by integrating the Yandex Go system for business.

Yandex Go for business

Оформление командировок — в личном кабинете

- Поиск и бронирование жилья
- Настройка дополнительных сервисов: такси, каршеринг, питание, оплата топлива на АЗС
- Отчёты и закрывающие документы





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