

# RUSSIAN TRAVEL MARKET DIGEST

SPECIAL EDITION



# DIGEST HIGHLIGHTS

The pandemic of COVID-19 made serious adjustments to lives of us all. Today, we see an unprecedented situation where travel business representatives have to step away from the new traveller engagement strategy and ask everyone to stay home safe.

In our special edition of the digest, we tried to evaluate the impact of the crisis situation on marketing strategies in different countries and regions and present our vision of a post-coronavirus travel marketing development strategy.  
Enjoy the reading!



**YULIA VASILYEVA**

**Editor**

**[yulia.vasilyeva@rmaa.agency](mailto:yulia.vasilyeva@rmaa.agency)**

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# ECONOMY IN THE FACE OF PANDEMIC. WORLD

The world economy in 2020 is entering a recession, which duration and scale is determined by the spread of the coronavirus pandemic and restrictive measures introduced to fight it. Several expert centers forecast the recession to be continued in 2021, too.

Quarantine measures lead to a collapse of a significant part of businesses, a dramatic drop in aggregate demand, a rise in unemployment and bankruptcies, an escalation of problems with liquidity at the company, bank, and population level.

## THE VNESHECONOMBANK INSTITUTE PRESENTS THREE POSSIBLE SCENARIOS OF WORLD ECONOMY DEVELOPMENT IN VIEW OF THE CORONAVIRUS PANDEMIC.

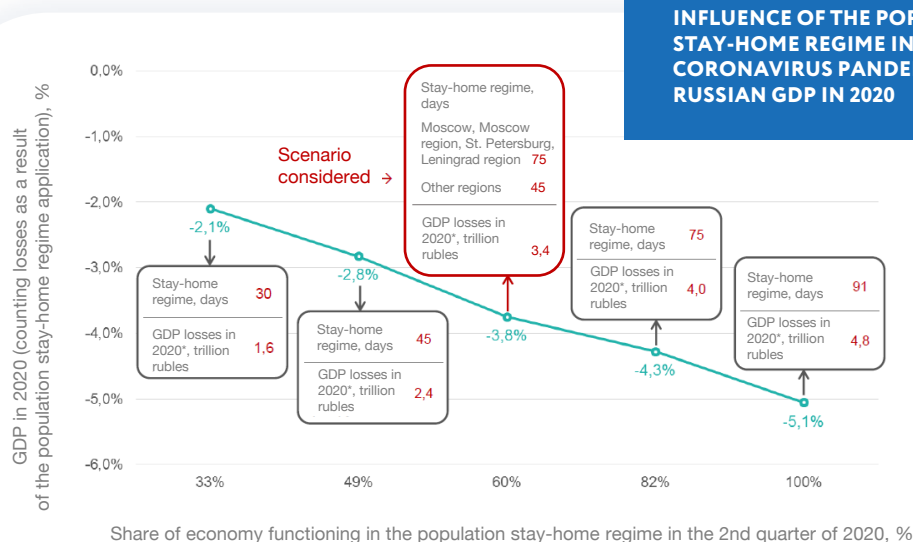
| Metric                                                                            |                                                                 | Basic scenario | Recession scenario | Deep recession scenario |
|-----------------------------------------------------------------------------------|-----------------------------------------------------------------|----------------|--------------------|-------------------------|
|  | World GDP growth in 2020, %                                     | +0,3           | -1,5               | -2,5                    |
|  | Probability                                                     | 50%            | 40%                | 10%                     |
| Prerequisites:                                                                    |                                                                 |                |                    |                         |
|  | Peak disease rate                                               | May 2020       | August 2020        | December 2020           |
|  | Lifting quarantine and restrictions on travel between countries | July 2020      | October 2020       | 1 quarter 2021          |

# ECONOMY IN THE FACE OF PANDEMIC. RUSSIA

According to forecasts of the Vnesheconombank Institute, if self-isolation lasts for 75 days in Moscow and 45 days in regions, GDP losses in 2020 will be 3.4 trillion rubles.

Apart from the pandemic, the Russian economy is heavily affected by slumping oil prices.

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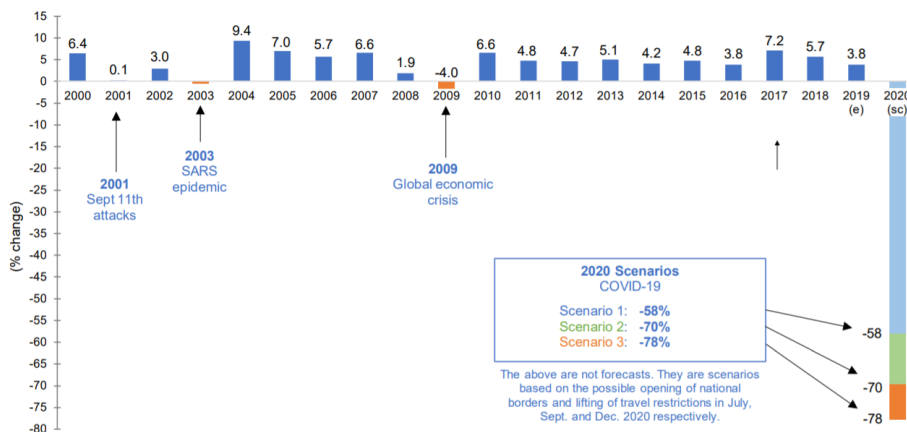


# TOURISM IN AN ERA OF PANDEMIC. WORLD

The United Nations World Tourism Organization (UNWTO) evaluated a travel activity decrease in 2020 as by 58-78%. Before, in January 2020, there was a forecast of 3-4% growth.

As estimated by UNWTO, the current crisis has been the fourth and the largest one since 2000. The first one happened in 2001, when because of 9/11 events the growth in world tourism was only 0.1%; further crises were already marked by negative dynamics of international receipts. The second crisis happened in 2004 during the SARS pandemic (-0.4%), the third one in 2009 because of the global economic crisis (-4%). As forecast by UNWTO, a reduction in the number of tourists will continue in the next five-seven years.

## INTERNATIONAL TOURIST ARRIVALS, 2000-2019 AND SCENARIOS FOR 2020 (% CHANGE)



# TOURISM IN AN ERA OF PANDEMIC. RUSSIA

This is the first time when tourism is in need of state aid.

According to the information from booking systems of some largest Russian tour operators, the nearest tours abroad are planned not before August 1, 2020. Reliance on August is also coherent with some other forecasts. At that, tours across Russia are available for booking with a departure in June 2020, as ATOR reports.

‘As estimated by ATOR, approximately one third of tour operators and travel agencies in Russia will have been closed by summer’, says Maya Lomidze, Executive Director of the Association of Tour Operators of Russia. ‘It is still impossible to give an exact estimate of money damage, but it is clear that we are talking about hundreds of millions or even billions rubles. In the worst-case scenario, if foreign countries are closed until September, outbound tourism operators will undergo the loss of 25 billion rubles and incoming the loss of 12 billion rubles’.\*

A study by Aeroclub, a business travel agency, showed that in the 1st quarter of 2020 the number of air tickets purchased by business travellers across Russia dropped by 20%, and the reduction in the number of business trips abroad reached 50%, as compared to the same period last year.

It is hard to project anything specific with regard to further development of travel industry. Only one thing is clear: today one can only count on deferred demand on travelling after the stay-home regime is cancelled and borders are reopened.

Thus, today one need to use time productively to generate demand.

# COVID-19 INFLUENCE ON MARKETING STRATEGIES OF TRAVEL OFFICES IN DIFFERENT COUNTRIES AND REGIONS

RMAA Travel team conducted a survey among representatives of national travel offices in different countries and regions to find out what changes have been made in marketing strategies of different destinations in view of coronavirus.

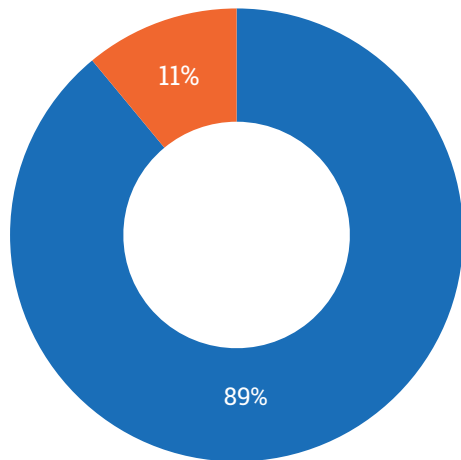
Period: 2020/04/24 – 2020/05/05

Number of respondents: 18

# KEY FINDINGS

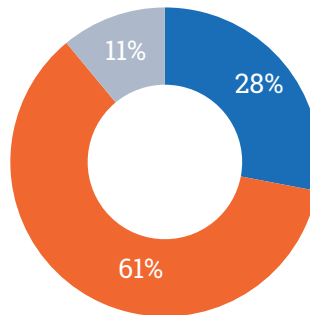
- 89% organizations changed their marketing strategies because of the COVID-19 pandemic. At that, most of them use this time to study the market and consumers, as well as to look for and implement new out-of-the-box solutions to promote their regions.
- Most travel offices managed to save their marketing budgets, but they had to redistribute them to a later period when borders between countries will be reopened. At that, one third of organizations had to cut their marketing expenses. In this regard, travel offices had to thoroughly reconsider their current communication channels used for promotion in the Russian market. The changes only glossed over maintenance of social media accounts, which activeness is still at the pre-coronavirus level.
- A key channel to inform Russian partners and tourists about the coronavirus situation in foreign regions is an official website for most respondents. The second place is taken by social media accounts.

# COVID-19 PANDEMIC INFLUENCE ON THE MARKETING STRATEGY AND REDISTRIBUTION OF THE MARKETING BUDGET



■ We reviewed and changed the marketing strategy

■ We didn't change our marketing strategy

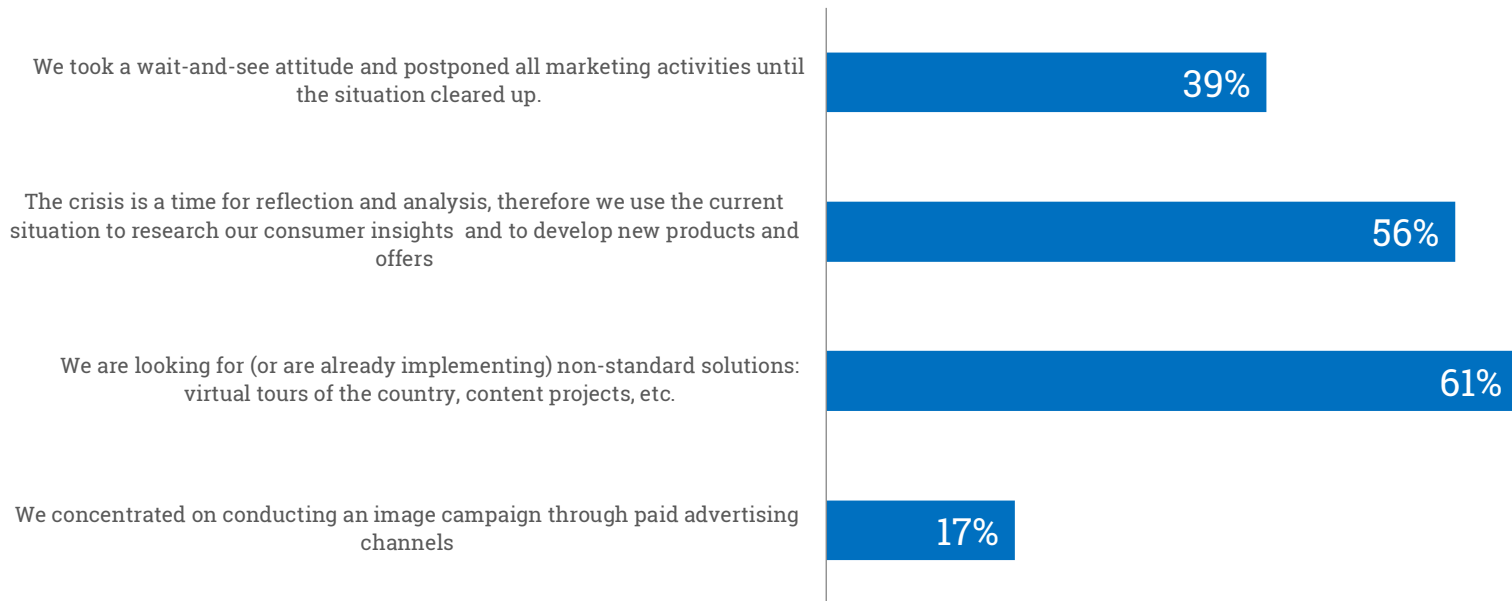


■ We have reduced the budget for marketing activities

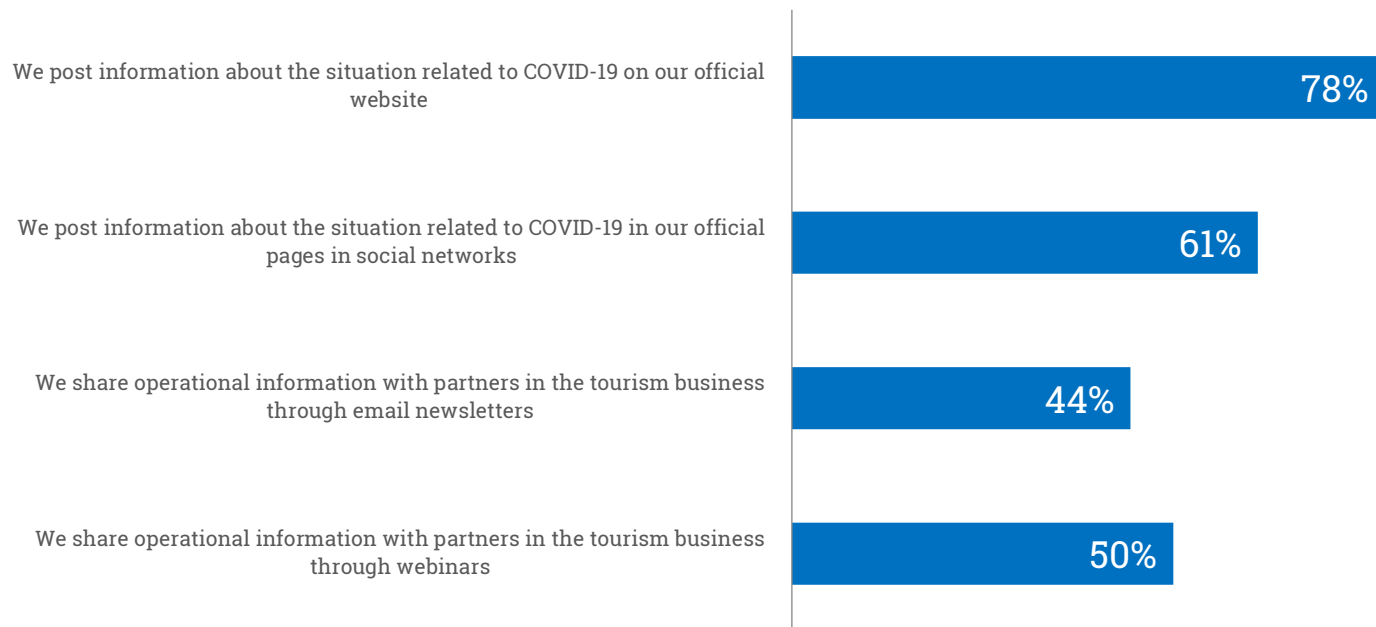
■ We have kept the marketing budget, but postponed it to the post-coronavirus period (after opening the borders)

■ We have moved the marketing budget to other functional tasks of the organization

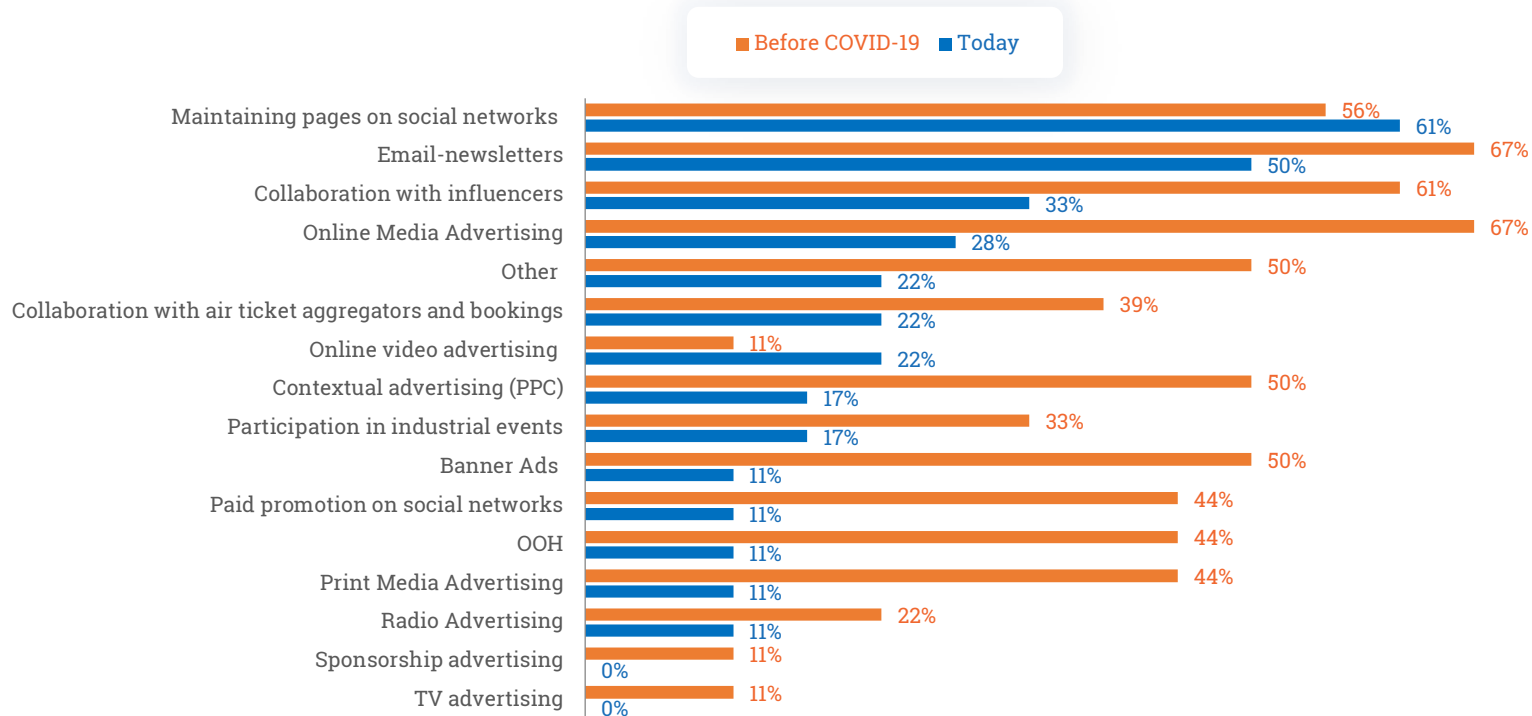
# WHAT IS THE STRATEGY OF YOUR ORGANIZATION TODAY?



# WHAT MEASURES DO YOU TAKE TO INFORM RUSSIAN PARTNERS AND TOURISTS ABOUT THE CORONAVIRUS SITUATION IN YOUR REGION?



# MARKETING ACTIVITIES BEFORE AND DURING THE PANDEMIC



# ANTI-CRISIS TRAVEL MARKETING

Recommendations from RMAA Travel  
experts in travel marketing

# ACTION PLAN

When all countries are closed, planes do not fly, tourists do not go abroad, let us dream a little bit and imagine what tourism will be like after the borders are reopened.



**TODAY**

under quarantine

**OBSERVE AND  
SUPPORT**



**TOMORROW**

after the stay-home regime  
is over

**RESTORE AND ADAPT**



**DAY AFTER  
TOMORROW**

after borders are reopened

**DEVELOP AND  
ENHANCE**

# OBSERVE AND SUPPORT



- Monitor the situation in the market.
- Observe and listen to users' opinions and responses: follow trends via brand requests and key hashtags #coronavirus #COVID19 #StayHome #StaySafe #TogetherAtHome #DiscoverFromHome, #TogetherInTravel.
- Support your travel brand with activities in social media and in your official website.
- Tell openly how your business copes with current conditions.
- Do not make any long-term plans—focus on short-term planning and situational marketing.
- Build online communication not only with potential tourists, but also with your partners: conduct webinars, conferences, and meetings.
- Adapt communication to new conditions: use new formats and tone to submit information.

# COUNTRIES STEPPED AWAY FROM THE STRATEGY #TRAVELNOW AND MOVED TO #DISCOVERFROMHOME



Actions to support tourism  
#DontCancelPostpone

Do not cancel your trip

REPROGRAMME IT

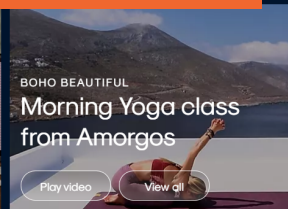
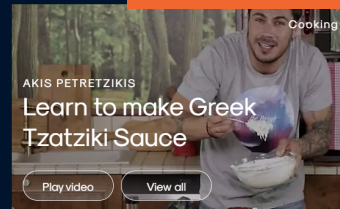


Virtual tours 360



Recipes, trainings, teaching

#greecefromhome



Test your knowledge about Germany



## History of the Maultasche

There are a few myths about the creation of the recipe for the Maultasche, a Swabian, meat filled dumpling, around 1790. Legend says the dish was created by nuns and monks in the beautiful monastery of Maulbronn (hence the name Maultasche in German) for a specific reason...

- ☐ To give Italian immigrants some comfort food as it resembles a Ravioli
- ☐ To hide their consumption of meat from God during the period of lent
- ☐ To mourn the death of Mozart in 1791

Quizzes

Next >

Time until next tour

06:27:12

Each trip lasts for at least an hour and people can take turns to be the controller for one minute each.

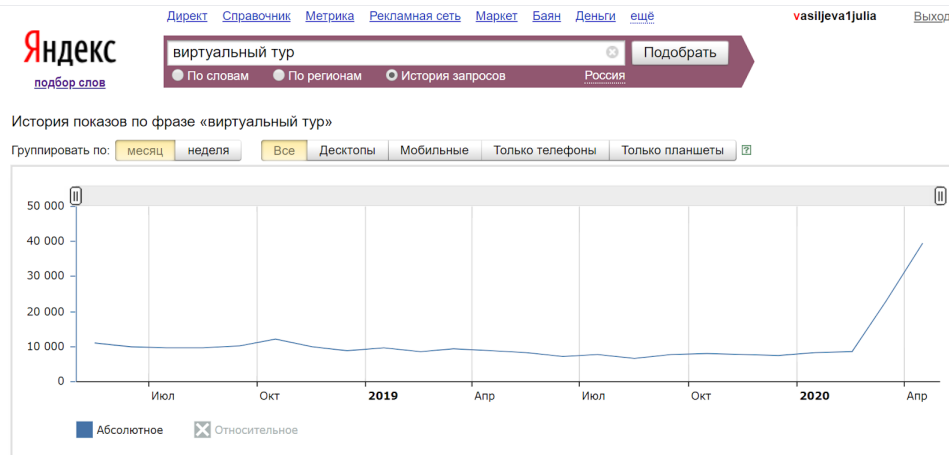
[Watch video about the project.](#)

Online tours with gamification elements

# TOURISTS WENT ONLINE, TOO

Under quarantine in Russia, the internet traffic (including mobile) showed growth up to 30%.

The interest of Russian users to 'virtual tours' increased by 170% in March 2020, and in April the increase went on and made up 360% as compared to the pre-quarantine period.



# RESTORE AND ADAPT

- Develop tourism inside your country: organize cooperation with local influencers.
- Warm up demand for incoming tourism, in particular, wellness one.
- Adapt your offer to new conditions—create an image of a travel destination that is safe and protected from viruses.
- Ensure interaction and mutual support between all travel organizations in your country, from the Ministry of Tourism to hotels and restaurants.
- Switch to mid-term planning, but with a greater flexibility than before the crisis.

# DEVELOP AND ENHANCE

- Develop a flexible 'post-coronavirus' strategy to promote your brand.
- Get ready to renewal of international tourism and an influx of tourists to your country.
- Get back to offline promotion channels, but do not forget about online. Continue developing communication channels used during the quarantine.
- Improve a creative concept to present your travel brand in the world arena.
- Raise activeness in all your promotion channels.



**RMAA Travel**

Marketing to Russian Traveller

**WE WILL HELP YOU ELABORATE A PLAN AND A  
STRATEGY OF 'POST-CORONAVIRUS' ATTRACTION  
OF TOURISTS FROM RUSSIA**

**Vadim Tylik, CEO**  
vadim@rmaa.agency

Read more:  
**[rmaatravel.com](https://rmaatravel.com)**

