

RUSSIAN TOURISM MARKET REPORT: TRENDS, ANALYSIS & STATISTICS 2022

How to impress Russian
tourists and attract them to
your country

Edition 2022





Introduction

RMAA team has done its own research of the Russian tourism market and written this study for tourism ministries, foreign companies engaged in the travel industry, airlines, hotels and foreign advertising agencies which deal with promotion of tourism and travel-related services in Russia.

Why is this study unique? Most tourism market researches cover only one of the aspects. For example, they are studying the behavior of tourists and eTravel market tendencies. We've tried to cover everything: from overall review to key players, from behavior of tourists to the marketing strategies of entering the Russian market.

RMAA

RMAA is a cross-border marketing agency dedicated to connecting brands with Russian-speaking audience. We help navigate cultural, linguistic & media landscape barriers to deliver your story to the Russophone audience.

Our travel industry focused team provides marketing solutions for global travel brands to conquer the Russian outbound tourism market.

We work with world-class travel brands like Indonesia, Philippines, Finnish North Karelia, Thailand, and many others to advise, build and execute travel marketing strategies.

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Overview of the Russian outbound tourism market

Russia in the world

Top 10 countries by GDP based on PPP

	2020, trillion \$	2021, trillion \$	2021, B %
China	24.17	27.21	18,62
USA	20.89	23	15,74
India	9.01	10.22	6.99
Japan	5.3	5.61	3,84
Germany	4.54	4.86	3,32
Russia	4.12	4.49	3.07
Indonesia	3.3	3.57	2.44
Brazil	3.15	3.44	2.35
Great Britain	3.04	3.4	2.33
France	3.02	3.36	2.3

According to the International Monetary Fund, Russia's economy is in the sixth place in the world by GDP.

Russia in the world tourism



Russia plays a significant part in the world tourism. In 2012 Russians spent for holidays abroad 43 billion US dollars enabling Russia to be included in TOP 5 countries in terms of expenditures of their citizens on holidays and travel abroad.

In 2013-2014 Russia held the 5th place, but in 2015-2016 it disappeared from the TOP 10 countries due to the currency crisis. In 2017 (+13%) Russia raised from 11th to 8th place and get into TOP 10 again.

In 2021, tourists from Russia spent \$11.4 billion, bringing the country to 11th place in the ranking.

Russian outbound travel & tourism market

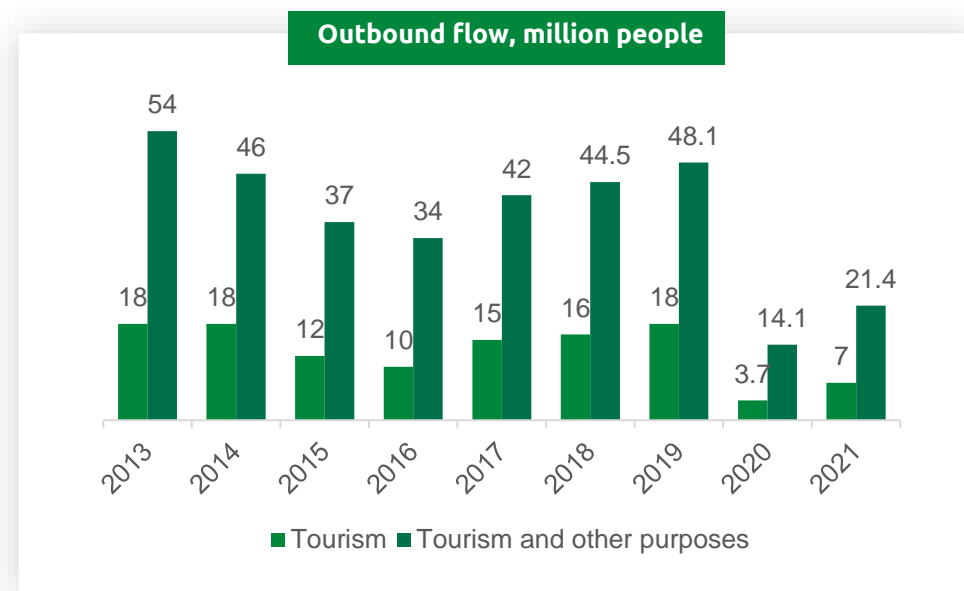
In 2014-2015 Russia passed through the currency crisis, which occurred due to the drop of oil prices and also economic sanctions over the conflict with Ukraine. As a result, the ruble went down against other currencies, and the economic climate deteriorated, which adversely affected the tourism market.

However, in 2017, the market began to grow. The positive dynamics of the outbound flow in general and the tourist flow continued until the beginning of 2020.

2020 has put the tourism industry in extreme conditions. As a result of the covid restrictions imposed by the countries, the outbound flow to foreign countries decreased by -71%. At the same time, more than half of the trips took place in the “pre-pandemic” first quarter of 2020.

In 2021, covid restrictions were regularly cancelled and reintroduced. At the same time, at the end of the year, the outbound flow increased by 51% compared to 2020, but this figure is still significantly lower than in the last 10 years.

2022 began with a rise in demand for outbound tourism. However, the restrictions and sanctions imposed on Russia since the end of February this year are once again bringing the global tourism industry into a state of complete uncertainty. Only one thing is clear, according to the results of 2022, the outbound flow from Russia will decrease again.

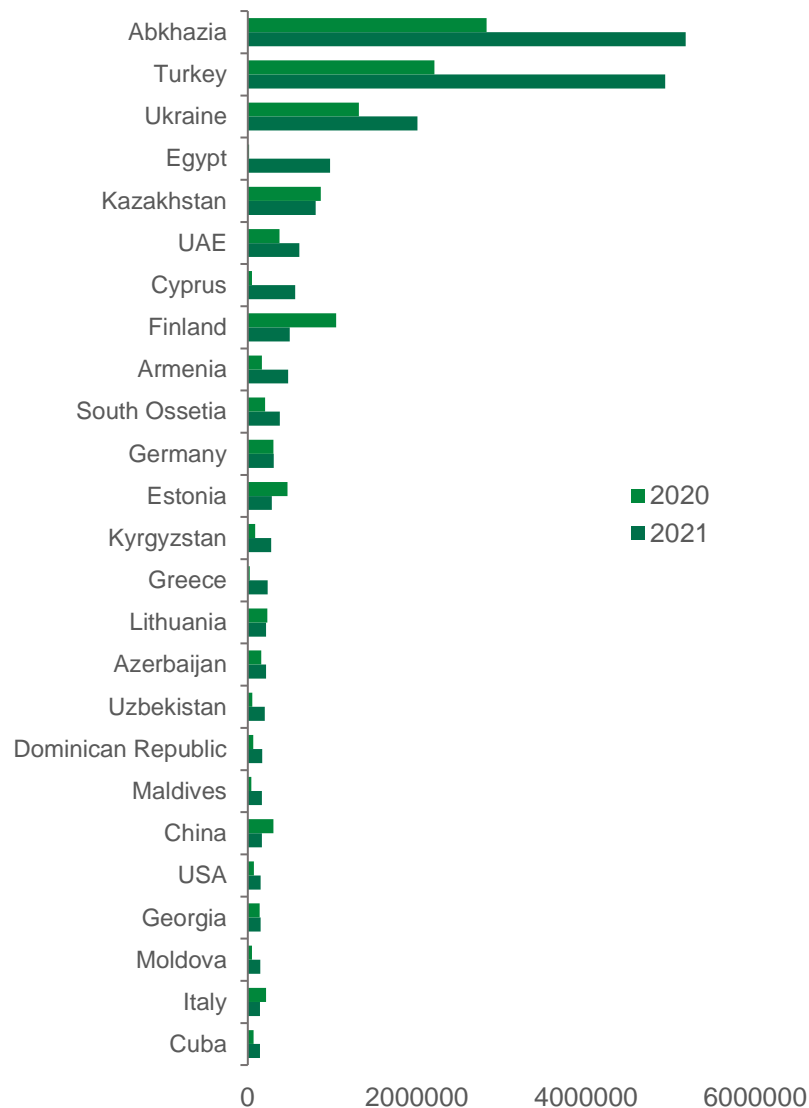


21.4 million

Russians went abroad in 2021. Outbound tourism grew by 51% or by 7.3 million trips compared to 2020.

What countries Russians prefer to visit

Top-25 countries in terms of outbound flow from Russia



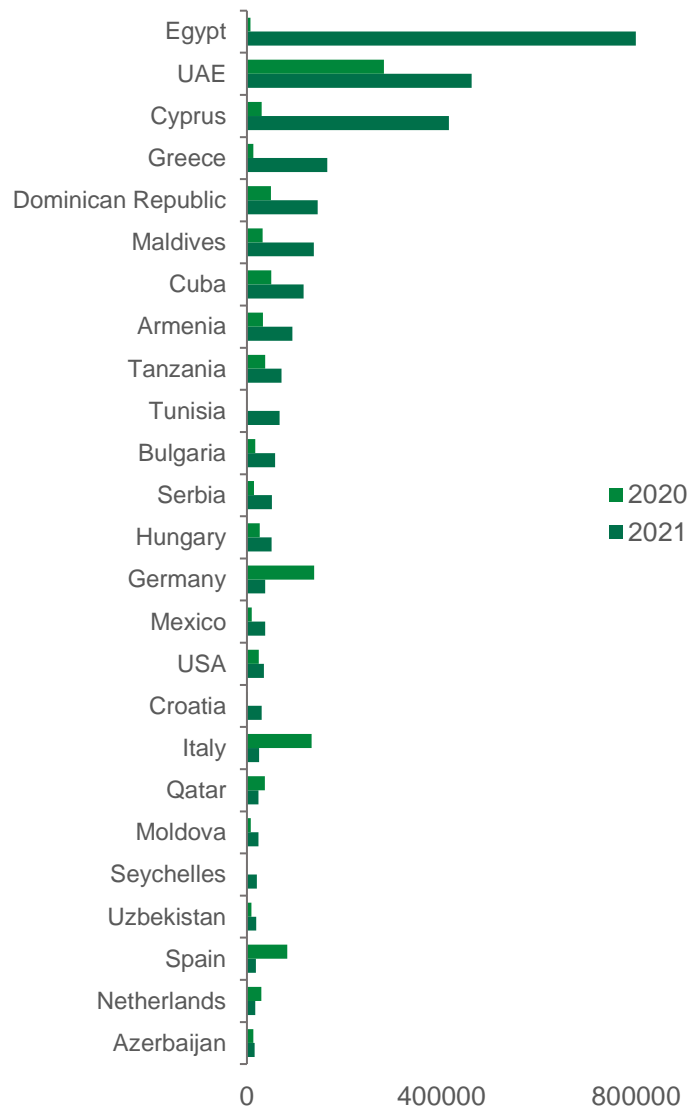
In 2021, Abkhazia became the leader in the number of trips (5.2 million), the outbound flow to the country increased by 83% compared to 2020 and by 8% compared to the pre-pandemic 2019. Turkey is in second place (4.9 million trips, +124% by 2020) and Ukraine is in third place (2 million trips, +53% by 2020). This data includes not only tourist trips, but all trips in general.

The palm in terms of the dynamics of the departure of Russians in 2021 was intercepted by Egypt. If in 2019 the country was visited by 30 thousand Russians, then in 2021 the number of trips increased to 973 thousand.

Russians often travel to countries bordering Russia, such as Finland, China, for work purposes, and they also go to the countries of the former USSR (Kazakhstan, Ukraine, Georgia) to visit friends and relatives.

What countries Russians prefer to visit

Top-25 countries in terms of outbound tourist flow from Russia (excluding Turkey)



However, if we take only the tourist flow, the TOP countries will change. All CIS countries will lose their leading positions where people go for work and communication with relatives, and Turkey will take a confident leading position by a huge margin. Almost 4 million Russians visited the country in 2021.

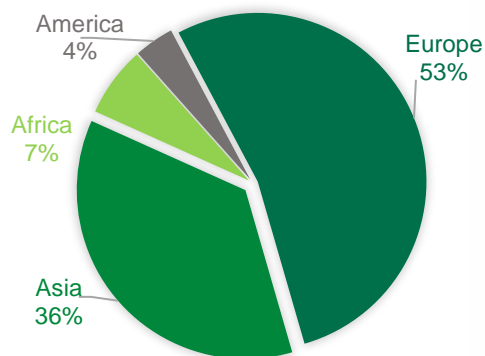
The tourist flow in 2021 increased by 90% compared to the previous year. More than 7 million Russian tourists visited foreign countries last year. The largest growth compared to 2020 was shown by the Seychelles, Tunisia and Egypt. The largest drop was in previously popular European destinations: Italy (-81%), Spain (-78%) and Germany (-73%).

What countries are visited from what regions

Russia is a huge country. It occupies 1/9 of the Earth's land and its length from West to East is about 10,000 km. The immense distances affect the tourist market, which is heterogeneous and varies from region to region. From the Far East tourists travel mainly to the countries of the Asia Pacific Region, and from St. Petersburg they mainly go to European countries. Otherwise, it's long and expensive to travel there.

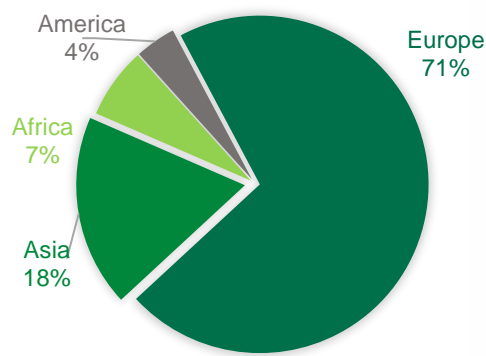
Different regions – different destinations

Tourism from Moscow



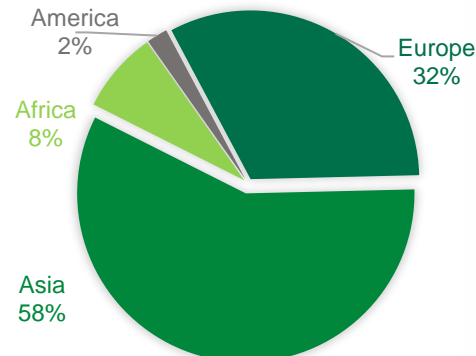
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| Europe | Asia |
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| Italy | Thailand |
| Bulgaria | |
| Spain | Africa |
| Germany | Tunisia |

Tourism from St. Petersburg



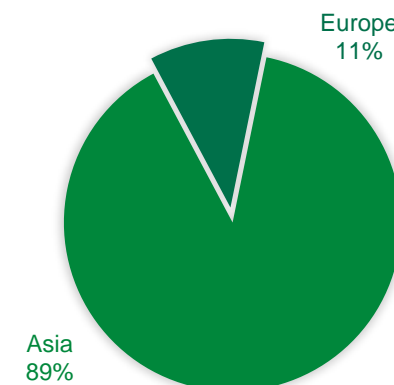
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| Europe | Asia |
| Finland | Turkey |
| Baltic States | Thailand |
| Greece | |
| Spain | Africa |
| Germany | Tunisia |

Tourism from the Volga, Ural, Siberian Federal Districts



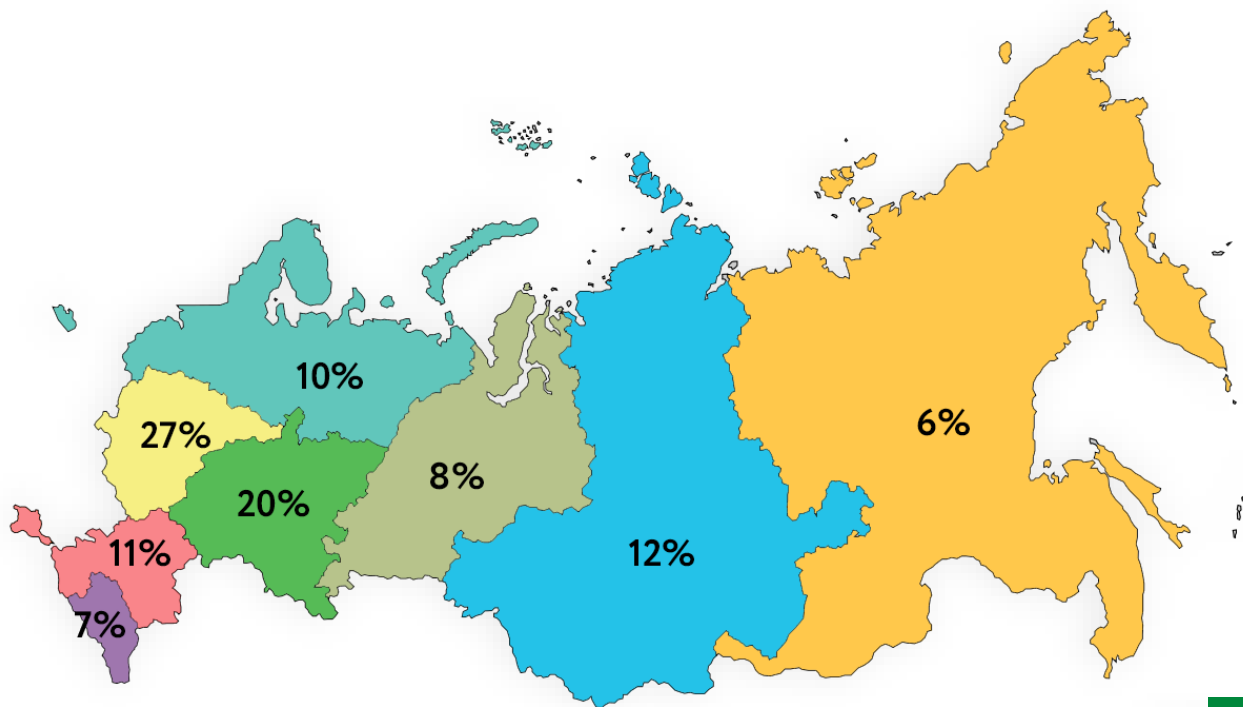
- | | |
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| Europe | Азия |
| Greece | Turkey |
| Spain | Thailand |
| Germany | Africa |
| | Tunisia |
| | Egypt |

Tourism from the Far Eastern Federal District



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| Europe | Asia |
| Italy | China |
| | Turkey |
| | Thailand |

Preferences of Russians from different federal districts

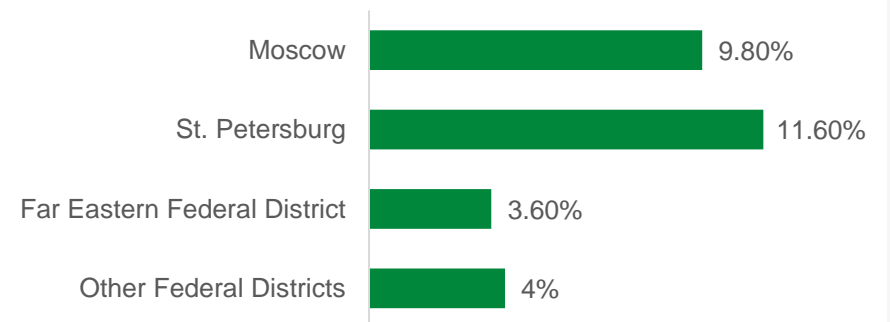


**RUSSIA'S POPULATION IS
145,6 MILLION PEOPLE**

Russia's population is distributed unevenly. For example, 27% of the population live in the Central District where Moscow is located, and only 6% live in the Far East.

The studies show that the residents of Moscow and St. Petersburg are traveling more readily than the residents of other cities of Russia. 10% of Moscow residents and only 4% of residents of other Federal Districts travel abroad.

Moscow and St.Petersburg residents travel more than other residents of Russia



When Russians go on trips

1 523 651
times

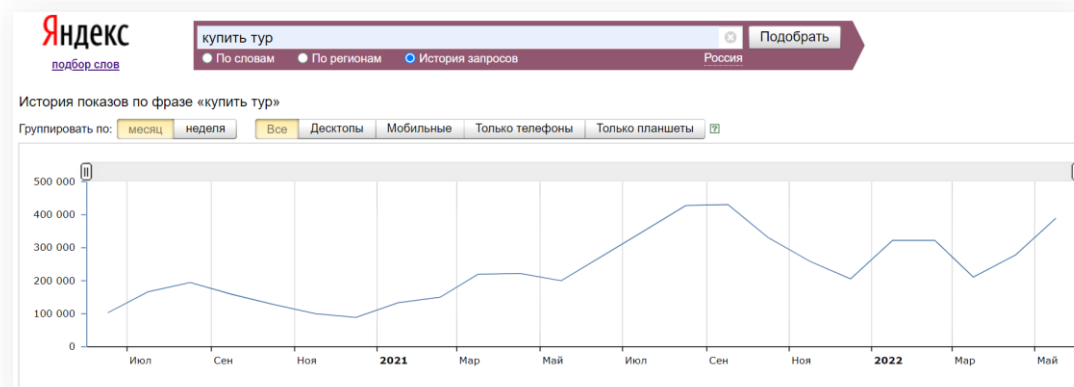
Russian users entered in Yandex search query «купить тур» («book a tour») in January-May 2022. This is 66% more than in the same period of 2021.

In 2021, the largest number of requests for the purchase of tours was in August (429,010 requests) and September (429,322).

The demand for tourist trips depends on the season, as well as on the socio-political situation. It is lowest in November – early December. Then it begins to grow. Many people go abroad for the New Year holidays, which last in Russia from January 1 to 10. In February, demand stabilizes, and in spring it begins to grow, reaching a peak in July-August. However, in March 2022, there was a slight drop in demand due to the unstable situation in the world.

Source: Yandex Wordstat, June 2022

Dynamics of the query “купить тур” (“book a tour”)



Top 10 countries in search queries “купить тур в...” (“book a tour to...”)

	%
Turkey (2)	221 625
Egypt (1)	83 137
Dominican Republic (4)	14 415
Thailand (9)	14 270
Maldives (6)	12 522
UAE (3)	10 083
Cyprus (11)	9 839
Cuba (8)	8 768
Mexico (10)	6 959
Greece (16)	4 398

* The country's position on the volume of Russians leaving for tourism in the Q1 2022 is shown in brackets. Countries from TOP 30 were taken for analysis.

Best countries to travel in 2022

According to a study by the NAFI Analytical Center, 84% of Russians love to travel. The largest number of fans to go on a trip is among women (87% versus 80% of men), people with higher education (91%), managers of different levels (91%) and those who assess their financial situation as excellent (88%).

Respondents were asked to answer the question: "If all coronavirus, sanctions and other restrictions were lifted and transport links between Russia and all countries of the world were opened, which three foreign countries would you like to visit the most?"

As the most attractive countries for a tourist trip, Russians most often named Italy (this country was noted by 28% of respondents), Turkey (23%) and France (18%). At the same time, older people, 60+ (33%), would like to go to Italy to a greater extent, and Russians from 35 to 44 years old would like to go to Turkey and France (23% and 28%, respectively).

Top 10 countries attractive for travel

	%
Italy	28
Turkey	23
France	18
China	17
Egypt	15
Germany	13
Japan	11
Spain	11
Thailand	10
USA	10



Portrait of a Russian tourist

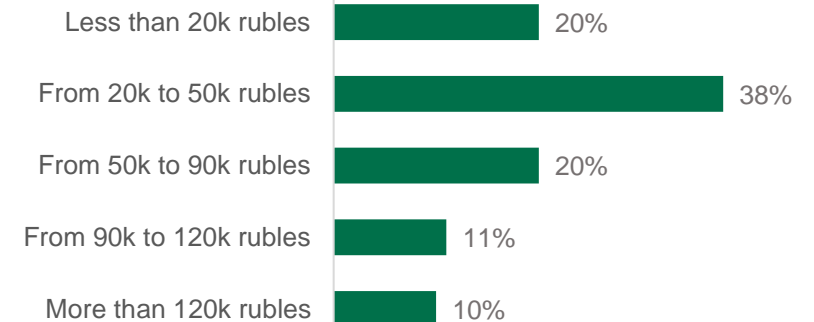
How much tourists from Russia are ready to pay for a trip

Most often, Russians stay within a budget of 20 to 50 thousand rubles. This is the average spend of 38% respondents. Every fifth tourist tries to travel as sparingly as possible, spending fewer than 20 thousand rubles. The same number of respondents are ready to pay from 50 to 90 thousand rubles.

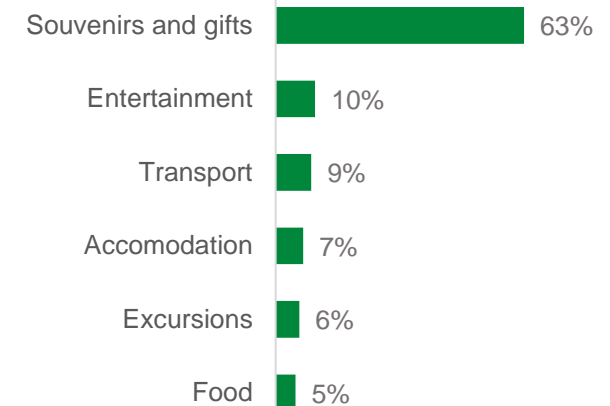
11% service users budget for 90 to 120 thousand rubles per tour. Only nearly ten percent respondents spend more than 120 thousand rubles on one trip.

The majority of respondents prefer to save money on souvenirs and gifts (63%). Least of all travelers are ready to deny themselves delicious food (5%), educational excursions (6%) and comfortable accommodation (7%).

How much are you ready to spend on vacation?

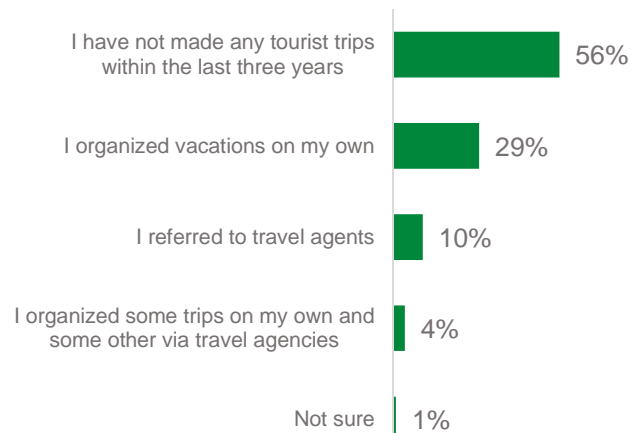


What do you most often save on when traveling?



Independent travels vs organized tours

If you have made any tourist trips across Russia or abroad within the last three years, did you organize your vacation on your own or refer to a travel agency?



Today, Russian tourists quickly make up their mind about the travel destination and come with a ripe plan. They plan their travels on their own and address to the Internet to choose a vacation spot and make up an activity plan three times more often than to travel agencies.

Within the last three years (until January 2020), 44% Russians made tourist trips across or beyond Russia. Out of them, 29% fully organized their vacations of their own, while 10% sought assistance of travel agencies.

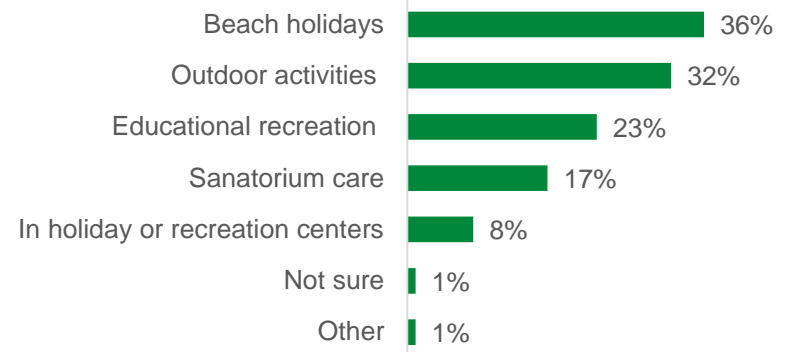
In their plans for coming holidays, 44% respondents will probably be looking for and buying tickets on their own, without any assistance of tour operators, and 43% do not rule out that they will be looking for and booking accommodation on their own. 29% Russians consider using tour operator services.

Preferable leisure time activities

When it comes to preferable leisure time activities outside their region, Russians primarily mention beach recreation (36%), active tourism (skiing, snowboarding, hiking etc.), and educational trips including historical site excursions and sightseeing (32% and 33% respondents respectively).

That said, male travellers show a preference for outdoor activities almost twice as often as women (43% respondents vs. 23% women), while women choose educational trips and sanatorium care much more often than men (26% and 22% vs. 18% and 12% men respectively).

What leisure time activities do you prefer?



What leisure time activities do you prefer?

	Men	Women
Outdoor activities	43	23
Staycation	38	35
Beach holidays	35	36
Vacation in the countryside	34	39
Educational recreation	18	26
Sanatorium care	12	22
In holiday or recreation centers	5	10
Other	1	1
Not sure	1	1

What Russians are interested in in other countries

Japan and China attract Russians most of all by their labor discipline, as well as by the high level of technological development and the automotive industry. The Russians also attributed solidarity to the strengths of the Chinese.

Italy and France are interesting to Russians primarily for their art and culinary traditions. The Russians noted that they are also interested in the French language.

India attracts Russians most of all with its architecture, as well as its traditions and customs.

In the culture of Belarus, Russians are attracted by diligence, friendliness, attitude to history and traditions. In the culture of Turkey - traditions, enterprise, a high level of service and hospitality, respect for elders, family values.

In the culture of Germany, Russians are attracted by accuracy and pedantry, labor discipline.

Great Britain attracts Russians with its traditions, high level of culture of people, culture of management.

Egypt attracts with historical monuments, enterprise of the people and a culture of mutual respect.

Top 10 countries whose culture is most interesting to Russians

	%
China	26
Italy	14
Japan	14
India	11
France	10
Belarus	6
Turkey	6
Germany	6
Great Britain	3
Egypt	3

Portraits of tourists

We conducted in-depth interviews with Russian travellers to understand better their needs and peculiarities of behavior. In the interview people tell about what is important for them during traveling, why they choose an organized tour or independent travel.

A good understanding of the target audience allows you to build more meaningful, personalized communication with them, get clear insight into the needs of travellers and conduct affective advertising campaigns.

Independent, individual travel

— Why do you like snowboarding?

— I like snowboarding because it really clears my mind. Up on the mountain no thoughts about work come. There everything is clear - if you are scared little bit, lose the balance, you fall off the track. For me, snowboarding gives me the opportunity to stay alone with myself. There is me, the mountain and there is a concentration, stress which brings enjoyment. Every time it's kind of overcoming. If you withstood the pressure and fear, you can pass some curve extremely well, jump super cool. But you need to overcome yourself every time. I like it. I wish it never ended. I would roll, roll and roll.

— How did you choose a ski resort?

— My father's friends told me that they went to Nagano, Japan for skiing. And when I didn't get to the ski resort Sheregesh near Novosibirsk, I decided to go to Nagano. The flight from Khabarovsk was even cheaper.

— How do you plan your travel?

— My planning is very funny: I plan the route from the airport to the hotel. My task is to reach Wi-Fi at a hotel. After I'll get everything arranged on the way. There is no sense to think about something else. I am a geek, that's why I download maps. I often upload them offline, there is such a mode in Google Maps. I sometimes even print out a piece of a map, the very "last mile" from the bus stop, where I get off, to the hotel. Because I know that I will be on my way at 10 o'clock and my phone can run out of charge by that time. I always make a booking in two languages. If we go to Japan, I print out a booking in English and Japanese to show it to a Japanese person and ask: "Where is it?"

Independent traveller

A man, 27 years old. He lives in the Russian Far East. He travels independently. He actively goes into sports. He prefers ski resorts. In 2017 he visited Nagano Ski Resort (Japan).

Independent, individual travel

— What did you like at the ski resort in Nagano?

— In contrast to our ski centers I liked that you can go without equipment to Nagano. There you can rent a jacket, helmet, gloves, whatever. It's cool! The equipment is divided into three classes there. There are a Baby class, Middle-class, a High performance Class for the pros. This is the first. Second is that there are different ranges of complexity starting for beginners and higher-higher-higher. There are trails for free ride and mogul skiing – just for crazy people. Third is the climate. I've gone skiing at 15 °C above zero for the first time. In Russia I go skiing at 28 °C below zero, but there you sit and drink coffee outside — it's an amazing experience. Fourth is a lot of snow, about three meters, and it's probably soft. Over the last few years we have problems with snow - it's hard and it's not enough. To fall is very painful and you can easily damage a board with stones. And it's so beautiful there. Views are spectacular when you are climbing to the top. What a spectrum! You think: "Somebody made it up!!!" It is very beautiful and the scale is exciting. The mind doesn't get used to it. It's really cool.

Independent traveller

A man, 27 years old. He lives in the Russian Far East. He travels independently. He actively goes into sports. He prefers ski resorts. In 2017 he visited Nagano Ski Resort (Japan).

- ❑ Thanks to the interview with travellers you can understand what inspires them and what their passions are. For what impressions he is ready to rush to the end of the world. It helps create really strong creative ideas, which don't leave those for whom it's intended indifferent.
- ❑ Russians often ask their friends and acquaintances for recommendations. The more people who will speak well of your country, the more likely that you will be visited by their friends.
- ❑ You can collect of experienced travellers that will help other travellers not to get lost in a foreign country and enjoy the leisure time. So you will take maximum care of tourists and create the image of the country welcoming even in small things.
- ❑ Tourists tells what they like best in your country and for which they are willing to pay money. Just use their arguments in advertising. Let those who are crazy about your country, and advertise it to others.

Independent journey together

— How do you prefer to travel on a package tour or independently?

The husband: We like to travel ourselves. We buy tickets on the airline website, book through booking.com and airbnb.ru. We rent a car if we need.

The wife: To travel independently is more interesting. To schedule a tour to the country where you haven't been yet is a real creative work. I choose an airline myself, book a hotel myself and decide myself what cities I want to see. You need to read forums for it, think through everything. It is a good brain exercise; I check the limits of my possibilities, my own courage. It's more frightening than to go on a package tour, but it's more interesting. I create our travel ourselves. The tour becomes a product of my creativity, my brainchild, my creation, and I am proud of it.

— Why don't you like organized tours?

The husband: I like when we go ourselves because in this way we are independent and move at our own pace. I don't like excursions due to it. I want to scrutinize something but everyone run already further. Or you have to wait for someone, or someone's children are screaming. When you are on your own, you organize your pace and space. We get up in the morning, spontaneously make a decision to go somewhere, get into a rented car and go. It's very convenient.

The wife: And I don't like organized tours because I understand what everyone is saying. I leave my country and want to immerse myself in another culture. And the presence of tourists who speak my native language, takes me back home, it's annoying. During traveling I like to communicate with locals, learn about their lives, culture, how they live, what they think. I have more impressions about other people rather than places.

Independent travellers

There is a married couple. The husband is 35 years old. The wife is 32 years old. They live in the Central Russia. They travel independently. They prefer educational tourism. They visited Japan in 2017. They visited Georgia in 2018.

Independent journey together

— What else do you like in the independent travel?

The husband: I like to taste local cuisine. We specifically chose the authentic places. In Japan, for example, we tasted business lunches in eateries where there was no English menu. So, besides sightseeing attractions we are interested in alien life, how other people live.

The wife: And also another point. We have nothing to say about beach package holiday. But you can write almost every day in social media about independent travel: where we move, what we do, who we talk with. I filled up all Facebook with photos during my travel.

Independent travellers

There is a married couple. The husband is 35 years old. The wife is 32 years old. They live in the Central Russia. They travel independently. They prefer educational tourism. They visited Japan in 2017. They visited Georgia in 2018.

- ❑ Tourists, referring to their experiences, snatch the strongest impressions and burst out ready slogans for advertising campaigns. "Create your travel" — isn't it a slogan? Take and use it.
- ❑ Tourists not only tell you why they choose independent travel, they explain why they reject organized tours. Sometimes their insights allow investing a new product which is without drawbacks.
- ❑ For modern tourists it's not enough to have a good rest, they need to discuss their impressions with their friends and share them in social media. The more interesting holiday will be, the more people will learn about your offer.
- ❑ Tourists tell the criteria why they choose your country. It's enough just to mention these criteria in the advertisement and they will attract new tourists.
- ❑ Good rest is not only beach and delicious food but also hundreds of little things like a hair dryer in a room and quiet neighbors. If you know these small things, you can create a personalized offer and win the hearts of Russian tourists.

Organized tour, travel together

— How do you prefer to travel on a package tour or independently?

The husband: We have the trusted travel agency through which we travel. We know that we'll fly on time and know that we'll fly back.

The wife: You feel more confident traveling through a travel agency, when you go abroad for the first time. My husband was anxious - he bought a book about Thailand, read about sightseeing attractions, about how to behave to lower a degree of uncertainty.

— How do you prefer to rest?

The husband: I like going sightseeing, doing shopping to buy gifts, exercising in a gym. I don't like swimming, to hang out at the beach is too boring. I like local cuisine; I begin to miss it in Russia.

The wife: In Thailand we like people, their benevolence and kind-heartedness. We like the weather, the sun and the sea. We like food, fruits, and drinks. We relax there and mentally calm down. I like the beach, relax, massage.

— What is important for a good holiday?

The wife: To enjoy my rest, it's important for to feel comfortable in a hotel room. The comfort for me is a view of the sea from the window, large soft bed, good shower from which water flows under normal pressure, hair dryer. It's also important that Chinese don't live in a hotel. They are too noisy, and they litter a lot. And also there shouldn't be violent Russians. I like when it's quiet, when nobody disturbs anyone, everyone is polite and respect other people's sleep and rest.

If we go through a travel agency and we are settled in a room, which for some reason we don't like it, we always change it. My husband always says: "Look at the room, are you satisfied?" If not, for example, with the view of a Chinese eatery, my husband goes to the reception and asks to change the room. They are responsive —they never denied to us.

Organized travellers

There is a married couple. The husband is 40 years old. The wife is 37 years old. They live in the Far East of Russia. They travel through the travel agency. They prefer a beach holiday. They visited Thailand in 2018.

The way of a tourist: from the intention to the review of the trip

The center of power and control over information has shifted in favor of the consumer. Now, it's ever more crucial to understand the path to a purchase and track the impressions at every point of contact with the audience.

In order you to visualize how tourists from Russia plan their travels, we reproduced the way of a tourist from the moment he or she felt need to travel until he or she came back and shares his or her impressions. We showed where people seek information, how they make decisions, what emotions they feel, by the example of two portraits:

- a married couple traveling on a package tour;
- a single man travelling alone



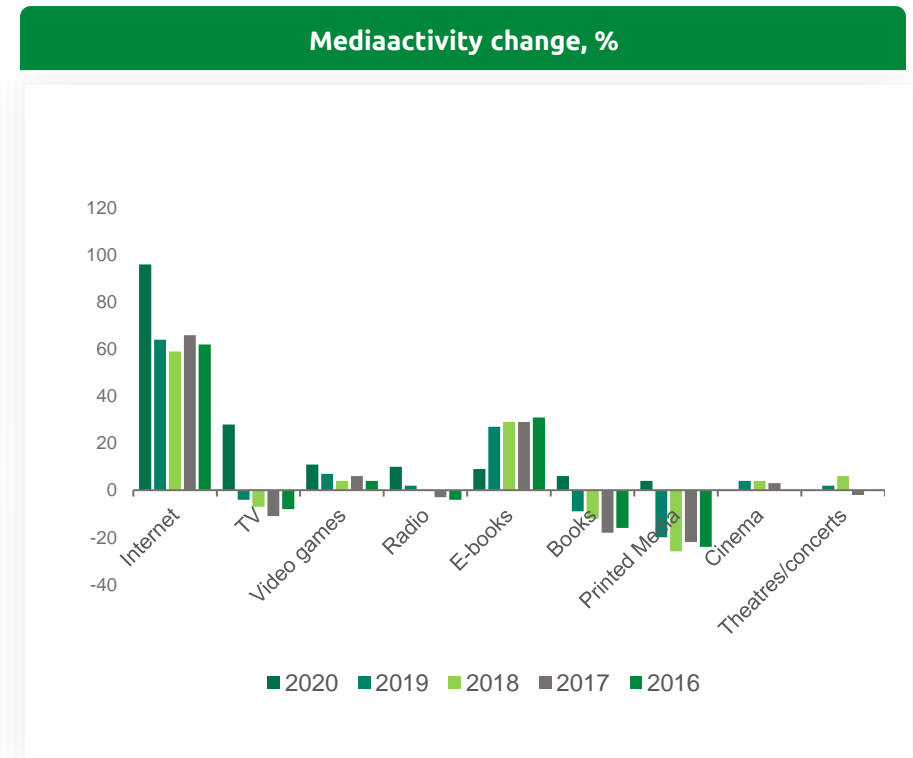
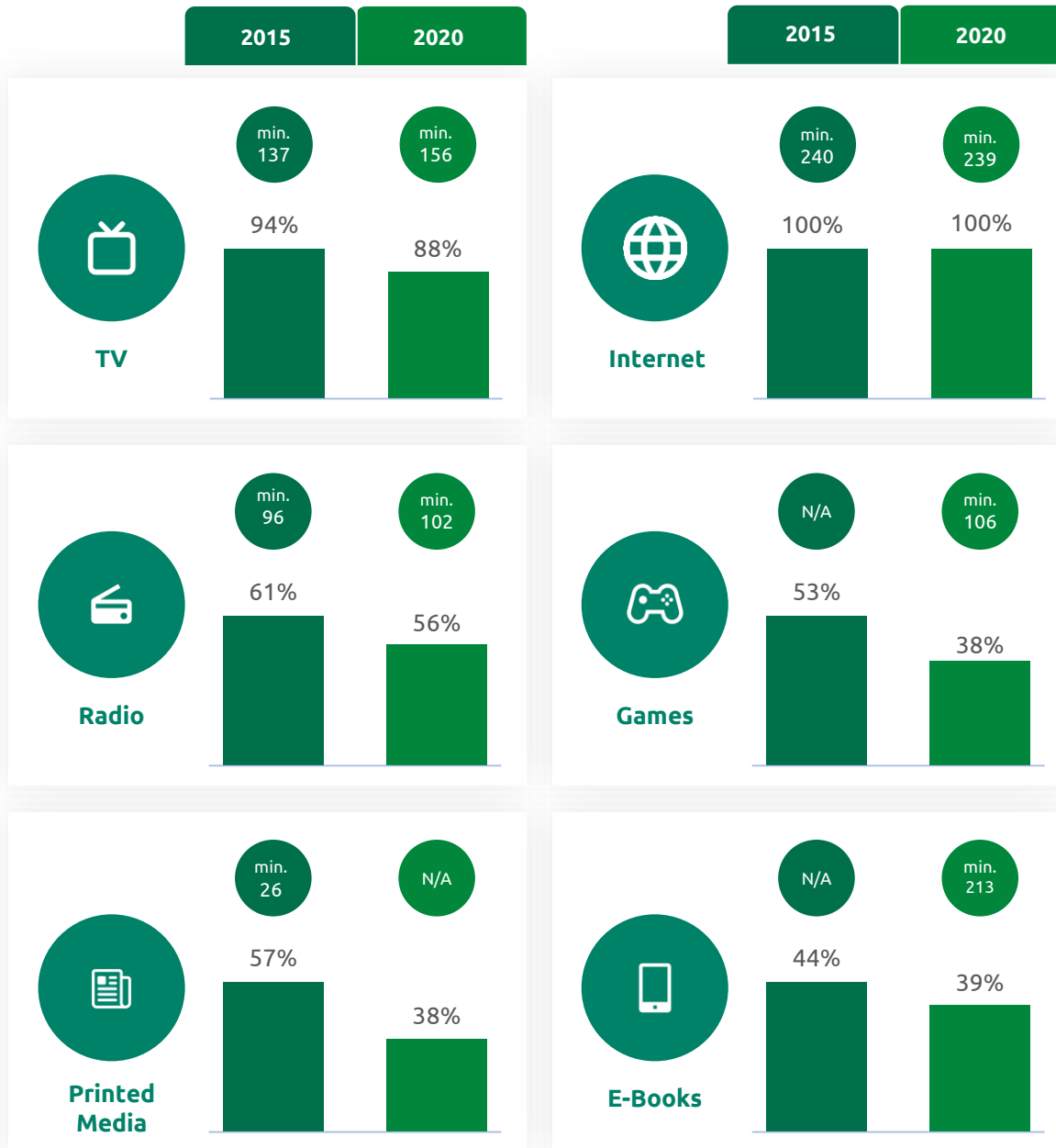
We placed out CJM into the separate PDF-file for you to consider it carefully

[Download](#)



Media consumption in Russia

Media preferences



In 2020, there is a decrease in the audience of many media channels (TV, print media, etc.) compared to 2019. At the same time the activity and time spent by consumers of media content on their favorite channels significantly increased in 2020. In 2020, due to the impact of the pandemic, many Russians noted an increase in the consumption of Internet services.

Attitude towards advertising



ready to watch ads if it allows them to watch videos for free

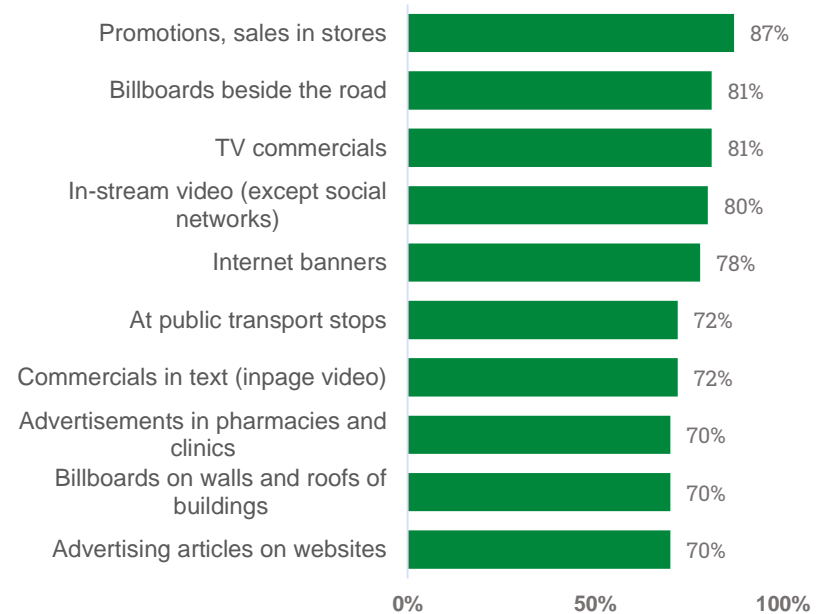


believe that advertising can be useful if it tells about interesting brands and products

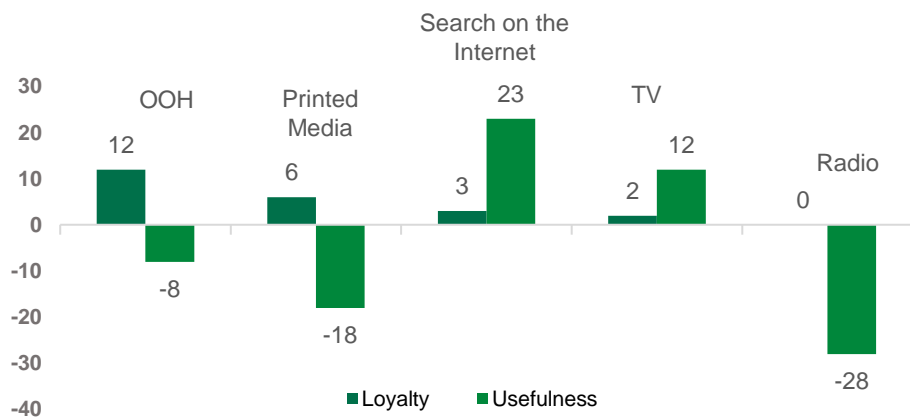


say they like funny or witty ads

Which ads get noticed the most?



Dynamics of the index of loyalty to advertising and the usefulness of advertising, %



The leaders in usefulness were: search advertising on the Internet (23 points) and TV advertising (12 points). For the age group 14-29 years old, the search advertising usefulness index reached 37% and is the highest indicator in the category, exceeding the value of the social media advertising usefulness index (33%).

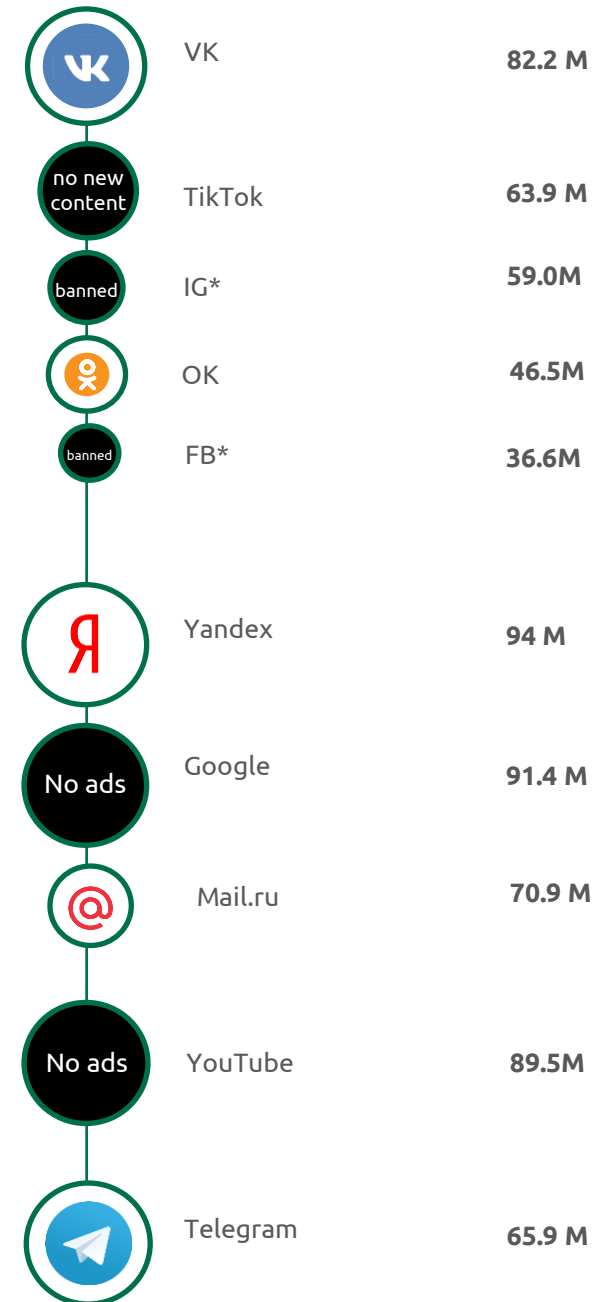
Russian unique digital media ecosystem

Facebook, Twitter and Instagram social networking platforms were blocked in Russia in early March. And monetization was removed from YouTube. On March 3, the Google Ads advertising system announced the temporary suspension of advertising to users located in Russia.

For companies promoting their products and services on the Russian market, there have always been alternatives.

VKontakte remains the largest social networking service. According to Brand Analytics, daily number of active Russian-speaking authors on VKontakte reached 3.96 million people in May 2022, and the number of posts reaches 13.5 million.

As for search advertising Yandex has created a whole range of services that allow you to assess demand and advertising costs, create, launch, and automate advertising campaigns, as well as analyze them.



Source: Mediascope, Russia, monthly active users, 12+, April 2022

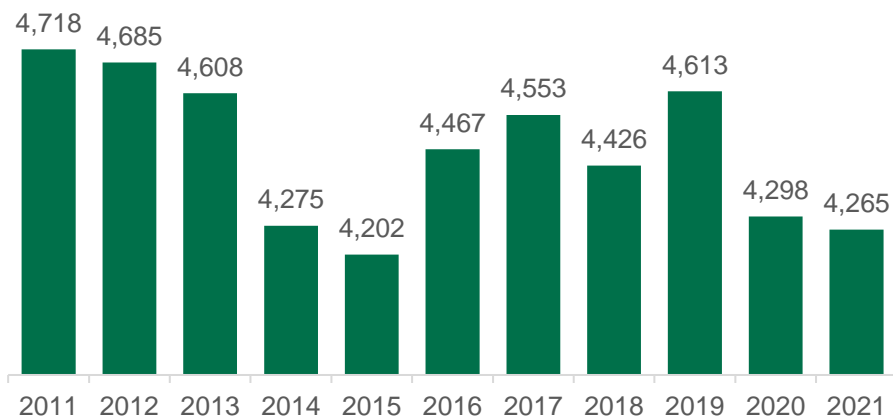
* The social network is recognized as extremist and banned in Russia



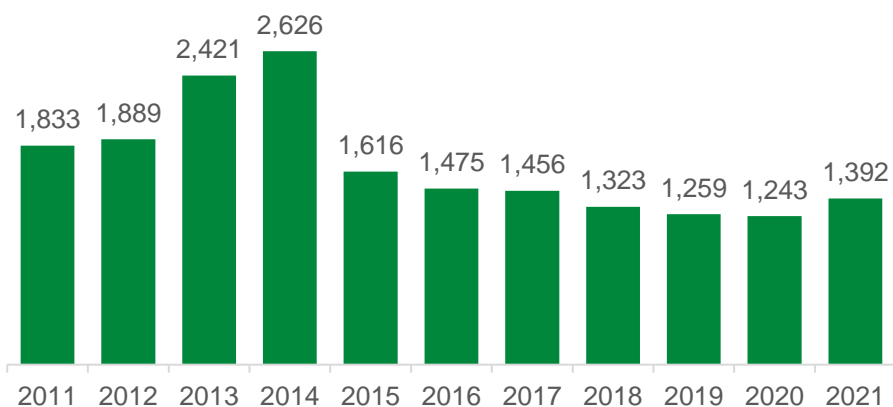
Overview of B2B travel market

Tour operators market structure

Number of tour operators



Domestic tourism



At the end of 2021, the number of legal entities-tour operators remained approximately at the level of 2020 with a slight decrease. The main reduction affected companies operating in the field of outbound tourism.

In domestic tourism, one of the biggest shocks of 2021 can be called the introduction of restrictions for unvaccinated tourists in the middle of summer in the Krasnodar Territory. Despite this, the number of players working in the domestic tourism increased by 12% in 2021.

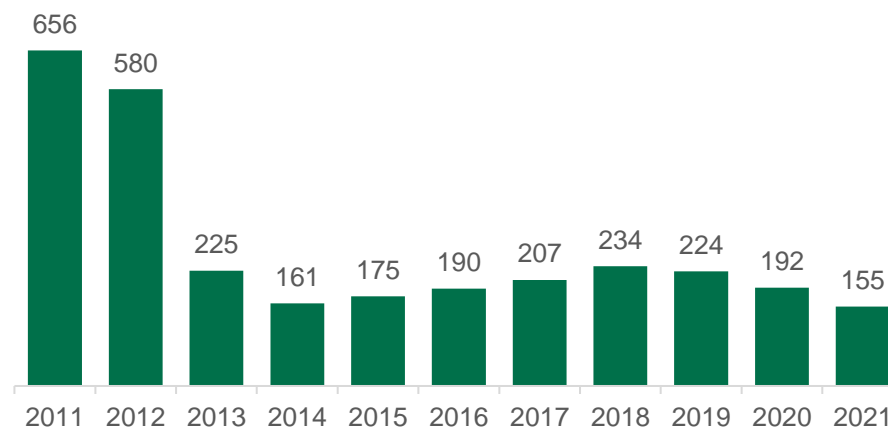
Tour operators market structure

At the end of 2021, the number of tour operators working with international inbound, as well as inbound and outbound tourism continued to decline.

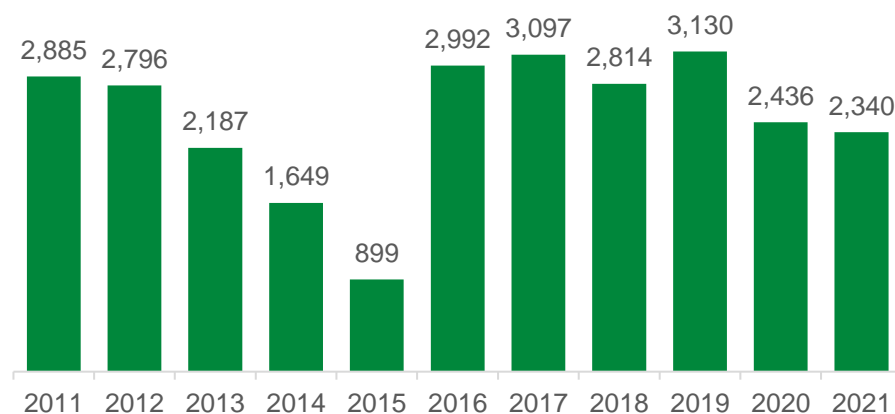
The number of players working in the field of international inbound tourism decreased by 19% and reached a ten-year low - 155 tour operators in the Russian market.

The number of tour operators providing inbound and outbound tourism services in 2021 decreased less significantly - by only 4% by 2020.

International inbound tourism



International inbound and outbound tourism



Tour operator reliability rating

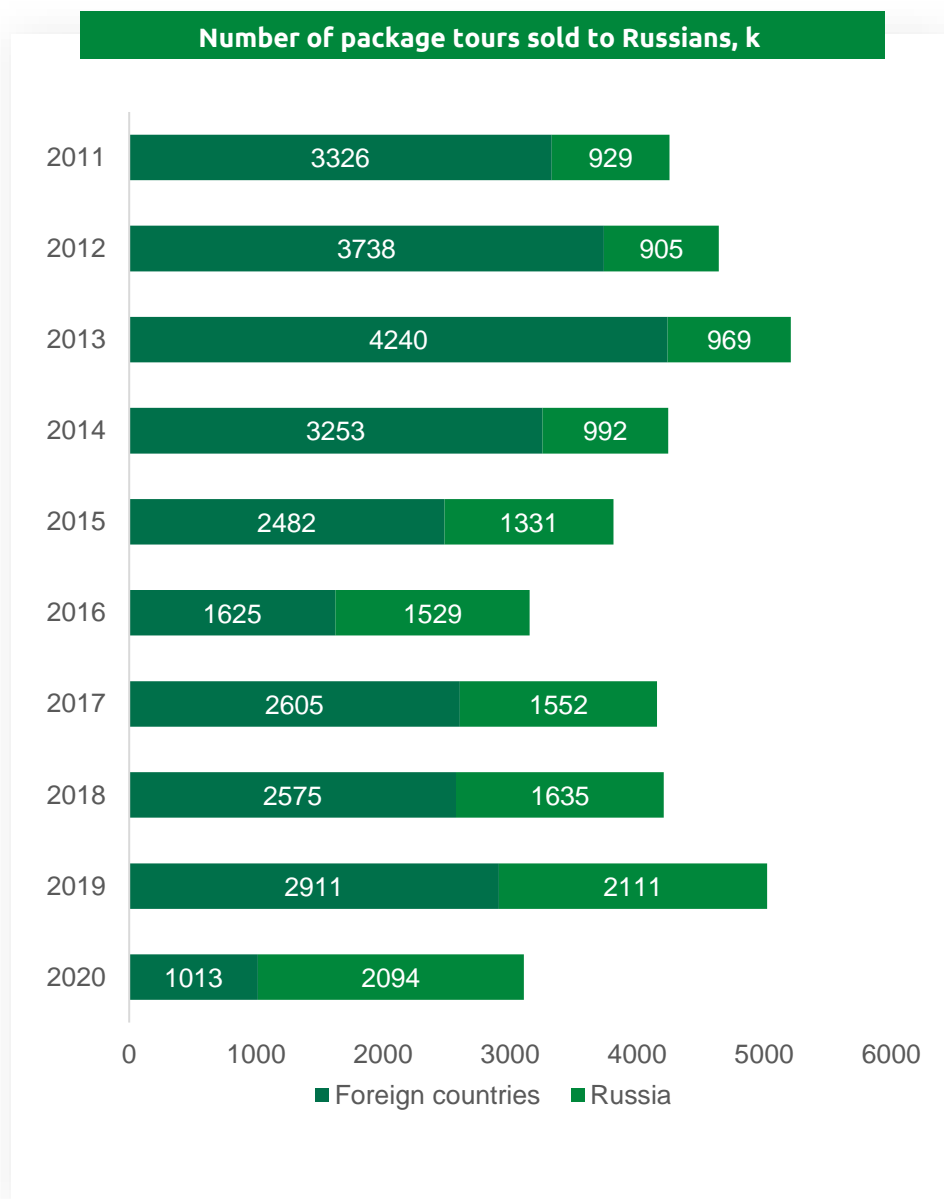


Tour Operator	The basic facts	Overall Rating
	Year of foundation: 1994 Thailand, Tunisia, Turkey, Spain and others	99/100
	Year of foundation: 1995 Cyprus, Turkey, Bulgaria, Spain and others	98/100
	Year of foundation: 1996 Thailand, Tunisia, Turkey, Dominican Republic and others	98/100
	Year of foundation: 1994 Greece, Cyprus, Turkey, Egypt and others	96/100
	Year of foundation: 1992 Thailand, Vietnam, UAE and others	96/100
	Year of foundation: 2015 Cyprus, Maldives, UAE, Russia, Turkey and others	92/100
	Year of foundation: 1994 Greece, Cyprus, Turkey, Spain and others	92/100
	Year of foundation: 2005 Turkey, Thailand, Bulgaria and others	88/100
	Year of foundation: 1929 Greece, Thailand, Turkey, Italy and others	88/100
	Year of foundation: 1992 Cyprus, Israel, Italy and others	86/100

The rating of tour operators was prepared by online tour hypermarket Travelata.ru based on data of 10 key criteria which affect the credibility of a tour operator and its position on the tourism market.

Counting system: The maximum possible total rating of a tour operator on the sum of all criteria is 100 points. The rating covered 24 largest tour operators which were evaluated by 10 key criteria characterizing a tour operator in regards to its credibility.

Sales of package tours to Russians

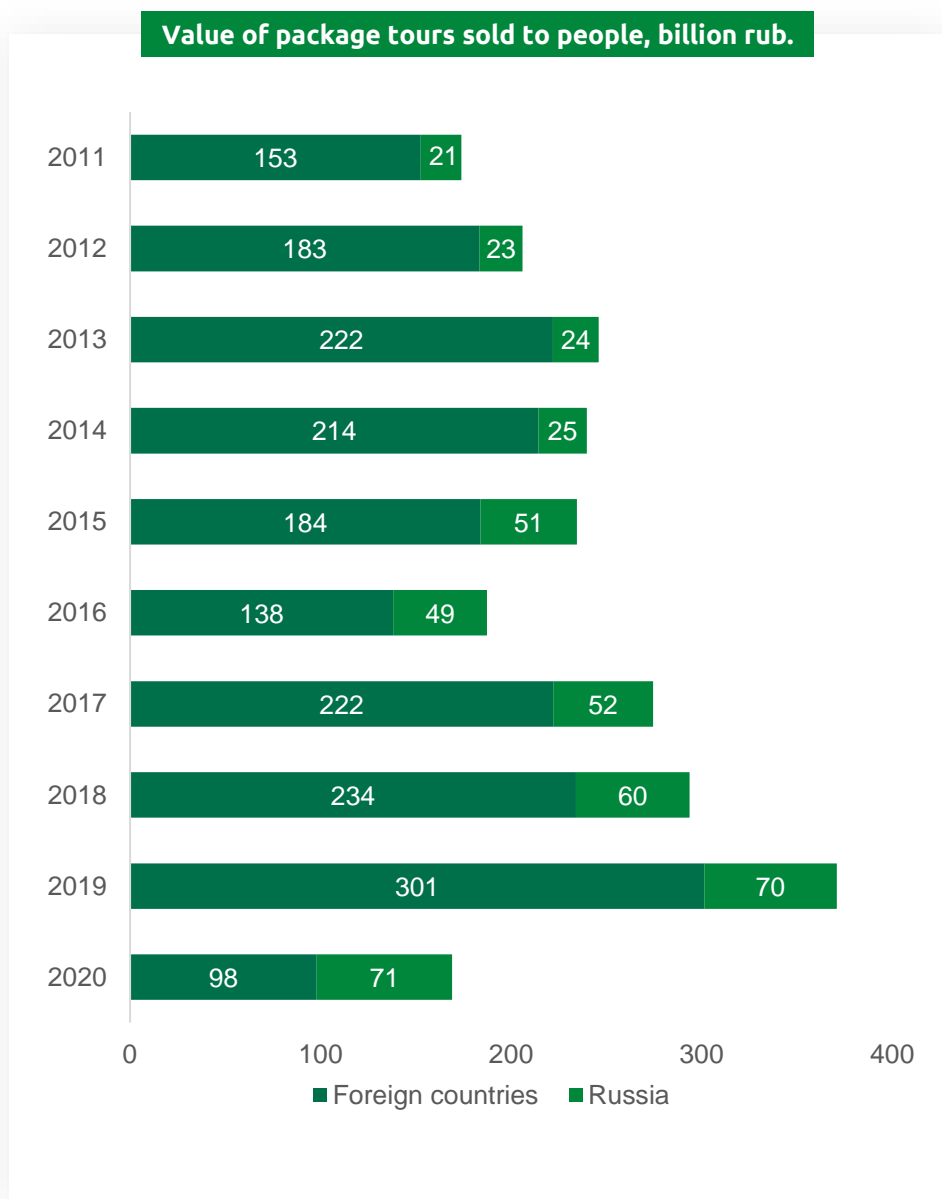


In 2020, due to the pandemic, the number of tour packages sold to Russians for traveling to foreign countries decreased by 65% compared to 2019. At the same time, the number of organized tourists traveling in Russia in 2020 decreased by less than 1%.

After the 2014-2016 downfall, the market of organized tours to foreign countries began growing. However, it never reached the pre-crisis level.

The dynamics of domestic organized tourism in Russia is significantly ahead of the outbound one. And for the first time in 10 years, due to objective factors, more tour packages were sold to domestic destinations than to outbound ones.

Sales of package tours to Russians

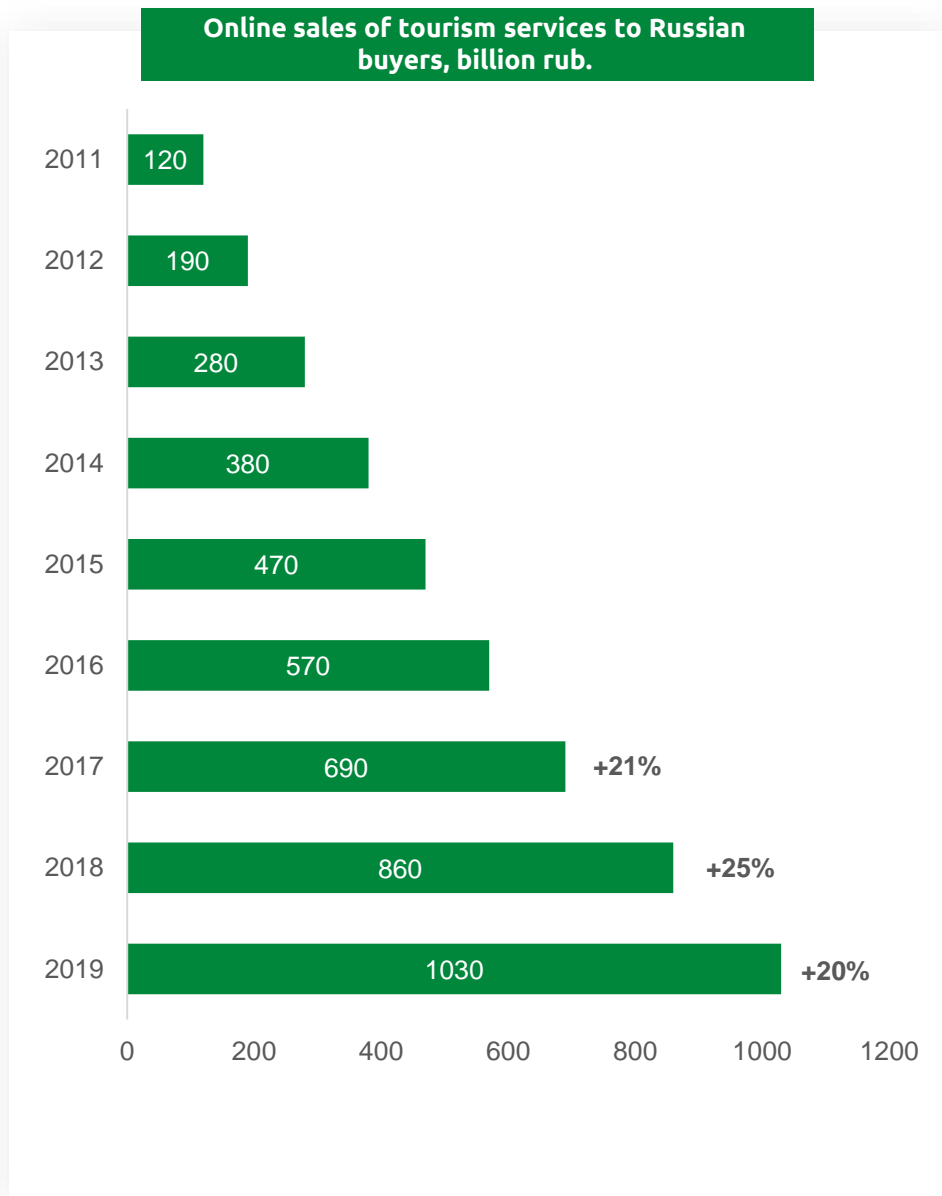


Income from tour packages in foreign countries sold to Russians in 2020 fell by 67% compared to the pre-pandemic 2019.

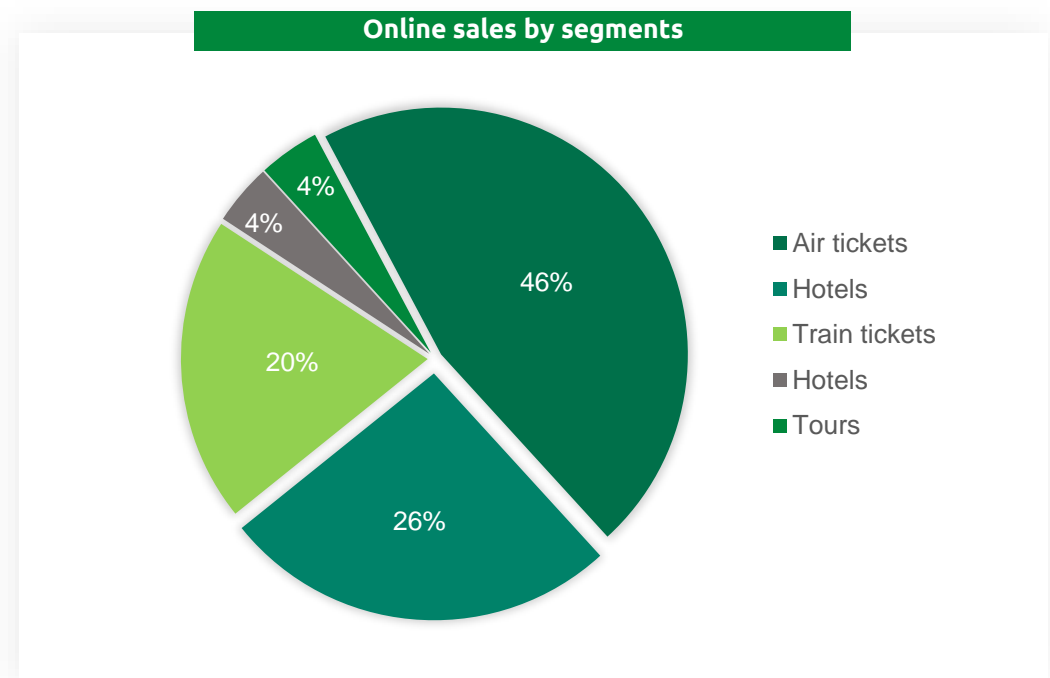
The income of domestic organized tourism has been steadily growing over the past 10 years and in 2020 it grew by 2% compared to the previous year.

The total loss of the Russian tourism industry in the sale of tour packages for 2020 amounted to more than 200 billion rubles.

eTravel market value



The volume of online purchases in the Russian travel market accounts for a slight share of the total travel market, although it is actively growing. According to a 2019 study by Data Insight, almost half of the market by value is air tickets. The second place is taken by hotel booking (26%), while tour online sales account for 4% only. The eTravel market in Russia exceeded 1 trillion rubles. The market is sustainably growing by 20% per year on average.





Travel industry trends

Changes in Tourism 2022

The list contains the most significant events that, according to RMAA experts, will have the greatest impact on the dynamics of Russian outbound tourism in 2022



- More than 30 countries have closed their airspace to Russia.
- The lack of direct flights, the high cost of connecting flights and the inability to pay abroad with bank cards issued by Russian banks have become one of the main reasons for limited demand on previously popular European destinations.
- The limited use of payment instruments by Russian tourists, the departure from the Russian market of Booking.com and the inability in most cases to buy a ticket on the website of a foreign airline has become a reason for some independent Russian travelers to book package tours, ground services (hotels, transfers and excursions) and air tickets from tour operators.

Changes in Tourism 2022

The list contains the most significant events that, according to RMAA experts, will have the greatest impact on the dynamics of Russian outbound tourism in 2022

- Popular tourist destinations are revising entry protocols for Russian tourists: they are cancelling masks, tests and returning pre-pandemic entry rules.
- Some countries are launching new flights to increase the number of tourists from Russia. The Russian departments agreed on 450 additional flights per week to Turkey for the summer period.
- Popular tourist destinations among Russians are considering switching to rubles in tourism (for example, Egypt).
- Russians are discovering new tourist destinations: Russian tour operators for the first time offered all-inclusive beach tours in Kazakhstan, and the demand for tours to Qatar in May exceeded the same figures for pre-pandemic 2019 by 2.5 times.



5 tourism industry trends in Russia 2022



Development of new directions of domestic tourism

Recently, there has been a trend among Russian travelers to explore new destinations. If earlier the southern regions were the main destination for the trip, then now the tourist flow is gradually distributed throughout Russia.



Combining travel with hobbies

Today, travelers choose a program with an immersion into history or with sports activities, they want to get a new unique experience in agricultural tours, gastro tours, retreats.



Growing popularity of niche destinations

Last year's trend will continue into 2022. This season, tourists from Russia will rely on several key factors: the availability of flights and the absence of restrictions related to COVID-19.



Transition to new booking services

After the suspension of Booking.com and Airbnb in Russia, Russian booking systems and metasearch engines came to the fore, and demand for direct hotel bookings also increased.



Total change of the promotion system

If earlier one of the main promotion channels in the Russian market were YouTube, Instagram and Facebook, today businesses need to completely revise their marketing strategy and master VKontakte, Telegram, Yandex Zen, Odnoklassniki and RuTube.



**How RMAA helps travel brands to conquer
the Russian outbound tourism market**

The launch of the Flydubai OOH campaign across Russia as part of the 2021 marketing strategy

Project:

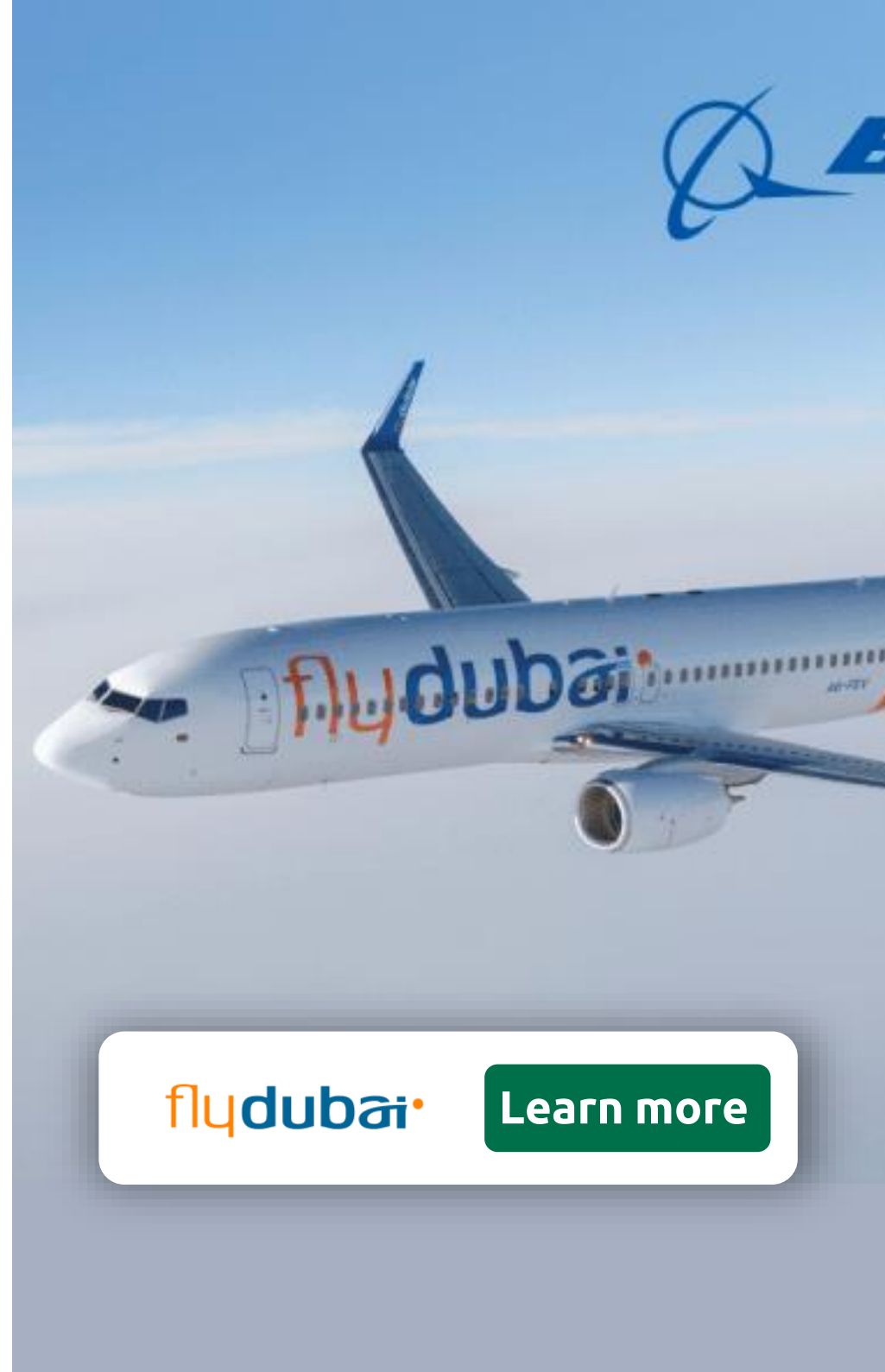
The main goal of the billboard campaign was to increase the reach and brand awareness among travelers in Russia.

Scope:

- Selection of advertising media for placement at the airports of Moscow, Makhachkala, Ufa, Kazan, Novosibirsk, Samara and Yekaterinburg.
- Adaptation and localization of advertising materials.
- Post-campaign photo and video-report.

Results:

The total passenger traffic at the airports where the advertisement was placed in December amounted to about 3 million people.



flydubai

Learn more

Thailand media promotion in CIS countries

Project:

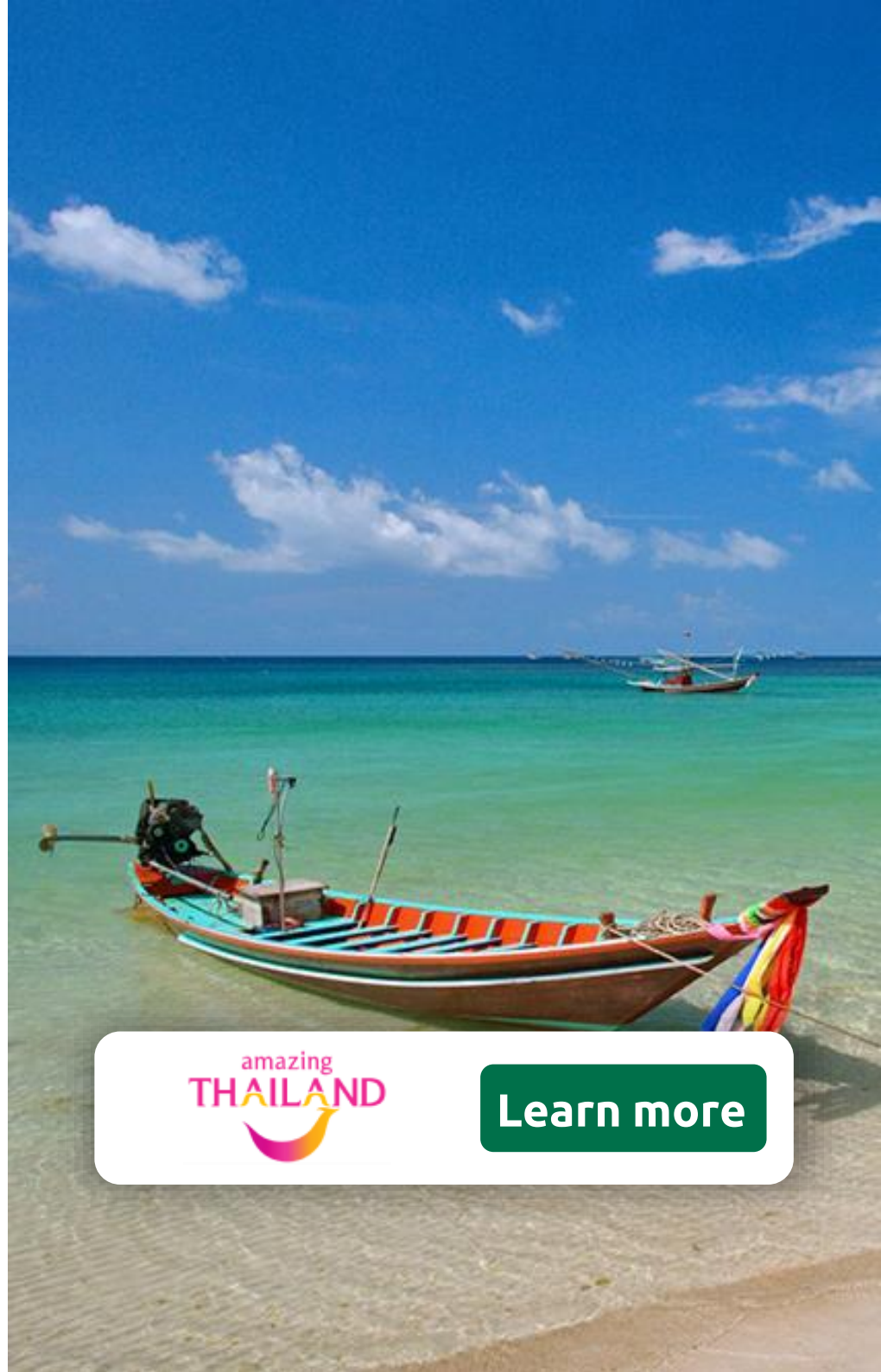
Conduct an advertising campaign to attract tourists from the CIS to the islands of Phuket and Koh Samui after the abolition of covid restrictions for citizens of Belarus, Kazakhstan and Uzbekistan.

Scope:

- Selection of relevant online media in Belarus, Kazakhstan and Uzbekistan to place an article about Thailand.
- Post-campaign report.

Results:

The total coverage was more than 100 000 users.



[Learn more](#)

How market research helps identify key travel signals

Project:

Our main goal was to conduct research to identify the changing Russian travel market signals. Develop a communication strategy for Finnish North Karelia.

Scope:

- Research of the Russian market.
- Development of communication strategy.
- Creation of a [Russian Travel Market Signals Platform](#).
- Post-campaign report.

Results:

Our experts provided a full report on the results of the study, on the basis of which we developed a communication strategy for promoting the region of Finnish North Karelia in the Russian market, and we created a tool that helps local businesses in attracting tourists from Russia.

The screenshot displays the 'VisitKarelia Russian Travel Market Signals Platform' website. The header includes the 'VisitKarelia' logo and the text 'Russian Travel Market Signals Platform'. Below the header, there is a search bar and a navigation menu. The main content area features a grid of 16 cards, each representing a different travel theme or location. Each card includes a title, a brief description, and a data visualization showing trends over the last 35 months. A prominent white call-to-action box at the bottom center contains the 'VisitKarelia' logo and a green button labeled 'Learn more'.

Location/Theme	Dynamics of Russians' interest	Change (35 months)
Aland Island	Dynamics of Russians' interest in Aland Island	Fall at 55.7%
Beach vacation	Dynamics of Russians' interest in beach vacation	Growth of 800%
Cultural and historical tourism	Dynamics of Russians' interest in cultural and historical tourism	Fall at 100%
Ecotourism	Dynamics of Russians' interest in ecotourism	Growth of 100%
Espoo	Dynamics of Russians' interest in Espoo	Fall at 5.3%
Finland	Dynamics of Russians' interest in trips to Finland	Growth of 99.4%
Fishing in Finland	Dynamics of Russians' interest in fishing tours	Growth of 60.2%
Glamping	Dynamics of Russians' interest in glamping	Growth of 200%
Helsinki	Dynamics of Russians' interest in trips to Helsinki	Fall at 13.8%
Imatra	Dynamics of Russians' interest in Imatra	Fall at 14%
Joensuu	Dynamics of Russians' interest in Joensuu	Fall at 61.4%
Jyväskylä	Dynamics of Russians' interest in Jyväskylä	Fall at 47.7%
Kuopio	Dynamics of Russians' interest in Kuopio	Not changed
Kuusamo	Dynamics of Russians' interest in Kuusamo	Fall at 77.4%
Lappeenranta	Dynamics of Russians' interest in Lappeenranta	Growth of 6.9%
Last minute holiday to Finland	Dynamics of Russians' interest in last-minute tours	Not changed
Lieksa	Dynamics of Russians' interest in Lieksa	Fall at 5.9%
Naantali	Dynamics of Russians' interest in Naantali	Growth of 46.9%
New Year tours to Finland	Dynamics of Russians' interest in New Year tours	Fall at 49.1%
Nurmes	Dynamics of Russians' interest in Nurmes	Growth of 100%
trips to Rovaniemi	Dynamics of Russians' interest in trips to Rovaniemi	Fall at 37%
Savonlinna	Dynamics of Russians' interest in Savonlinna	Growth of 74.3%
shopping tours	Dynamics of Russians' interest in shopping tours	Growth of 5.6%
sightseeing tours	Dynamics of Russians' interest in sightseeing tours	Growth of 60%
Ski resorts in Finland	Dynamics of Russians' interest in ski resorts	Fall at 5.7%
Ski tours to Finland	Dynamics of Russians' interest in ski tours	Growth of 14.3%
Tampere	Dynamics of Russians' interest in Tampere	Fall at 31.6%
Turku	Dynamics of Russians' interest in Turku	Fall at 29.9%

Russian market research and communication strategy for TAT

Project:

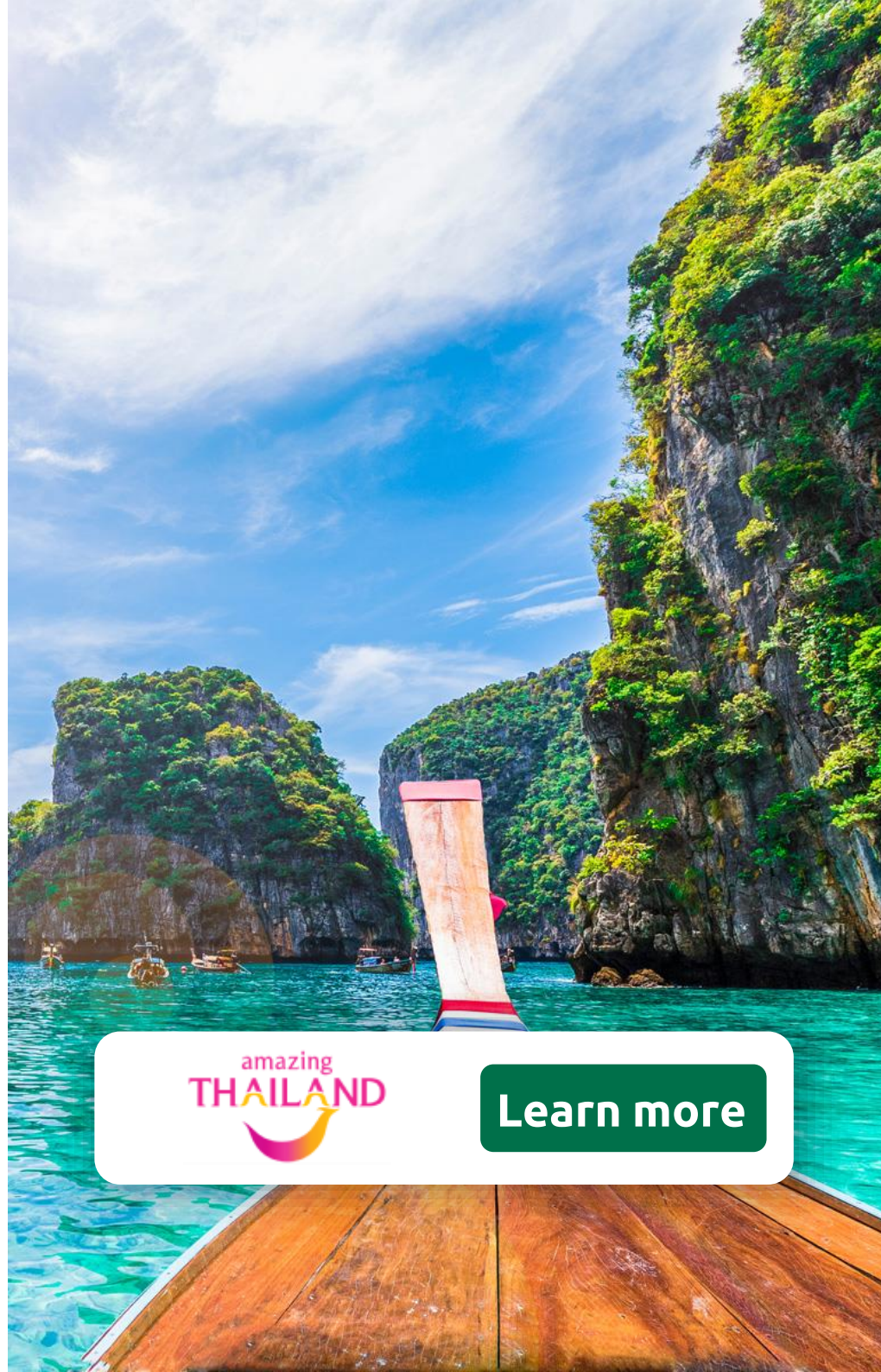
To conduct Russian travel market research and create a marketing strategy based on its insights and findings.

Scope:

- Organizing and conducting a study of the Russian tourism market
- Communication strategy creation

Results:

As a result, the client received an agile marketing and communication strategy that can be quickly adapted depending on the changing market situation.



[Learn more](#)

Promotion of the Finnish North Karelia among Russian tourists

Challenge:

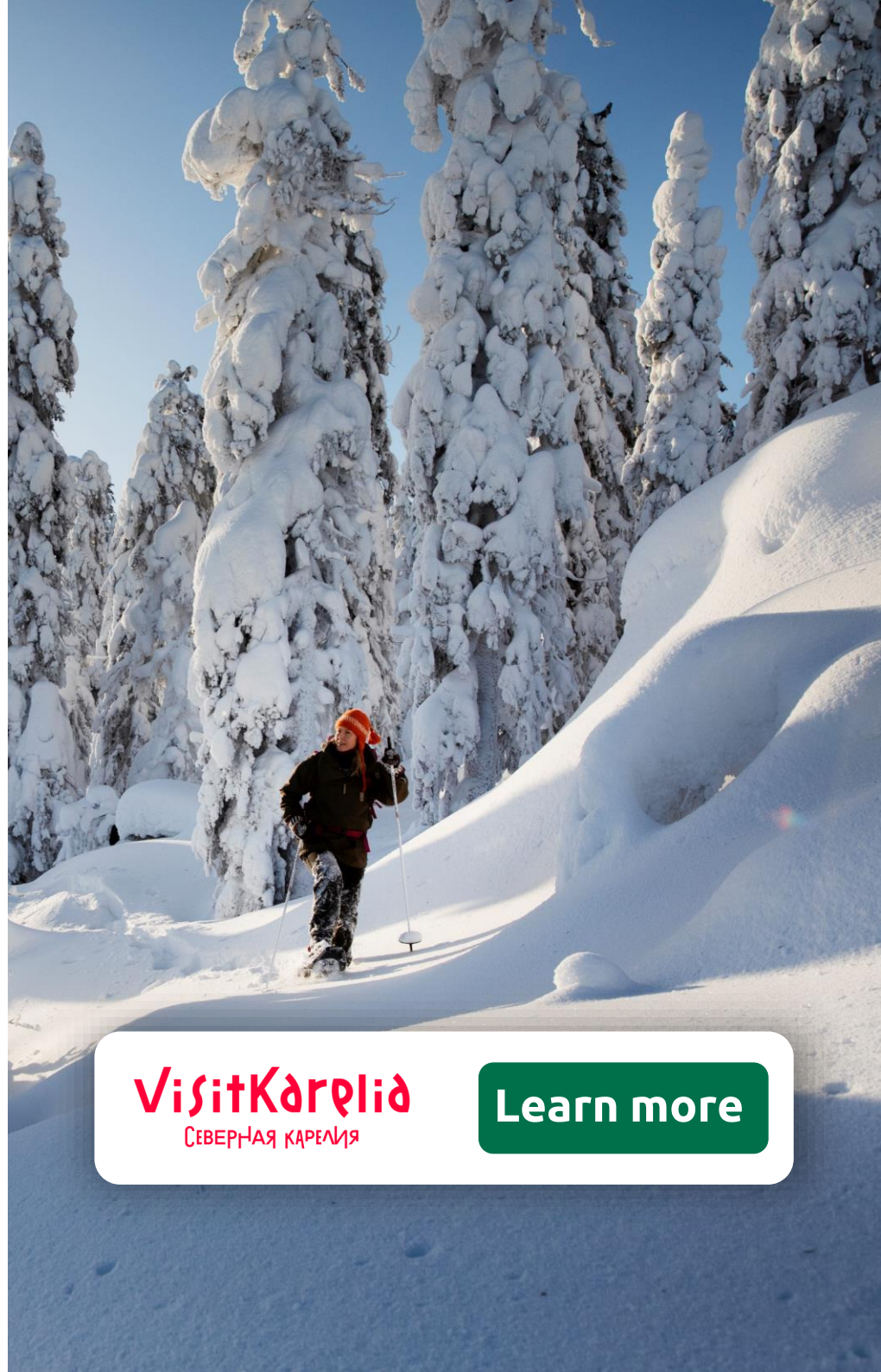
To put Finnish North Karelia on the world tourist map in the eyes of a tourist from Russia

Scope:

- Russian market study
- Marketing strategy planning and launching
- An interactive Map of the Crazy Acts in North Karelia creation
- Post-campaign report

Result:

- The total number of impressions on the Runet amounted to 11 mln
- The number of unique visitors to the visitkarelia.fi - 45 597
- The number of published articles in the media - 93
- The demand for the tourist region in the Internet increased by 1.5 times



VisitKarelia
СЕВЕРНАЯ КАРЕЛИЯ

[Learn more](#)

Promotion of the Finnish North Karelia among Russian tourists

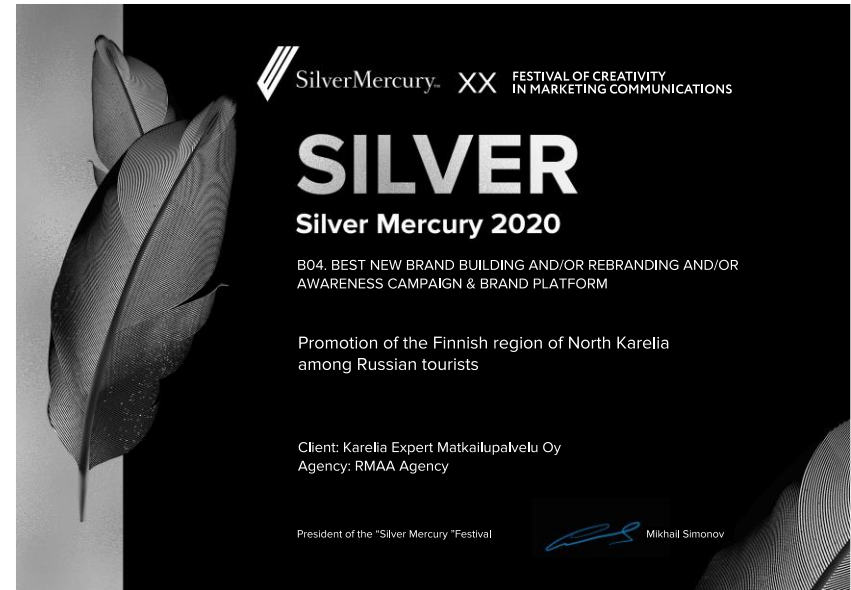
In 2020 the project for the Finnish region of North Karelia took

- **Silver Award** of the festival Silver Mercury for creativity - BEST NEW BRAND BUILDING AND/OR REBRANDING AND/OR AWARENESS CAMPAIGN & BRAND PLATFORM
- **Bronze Award** of the festival Silver Mercury for strategy - TRAVEL & LEISURE

[Silver Mercury](#) - one of the largest advertising and marketing communications festivals.

VisitKarelia
СЕВЕРНАЯ КАРЕЛИЯ

Video



Integration of Indonesia in the 2018 FIFA world cup

Project:

Out of home campaign in Moscow, Saint Petersburg, Novgorod, Rostov-on-don and Samara

Scope:

- Channels selection
- Campaign planning and launching
- Help in the adaptation of creative materials
- Third party independent post-campaign report

Result:

Audience over 60 million people



[Learn more](#)

Immersion into Japanese culture

The main task was comprehensive assistance in organization of the Tea Ceremony held in the Botanic Physic Garden of the Moscow State University as part of 2018-2019 Year of Japan in Russia.

The area of responsibility covered a wide range of functions, from mounting of the Tea House, the key element of the event, to water delivery. The major requirement was that that project should be implemented timely and without one single groan.



[Learn more](#)

Advertising campaign for the Philippines

Project:

Advertising placement on Russian TV channels.

Scope:

- TV Channels selection based on affinity indices
- Campaign planning and launch
- Help in the adaptation of creative materials
- Third party independent post-campaign report

Results:

- Audience more than 90 million people
- Reach 50%



It's more fun in the
Philippines



[Learn more](#)

Advertising campaign for Morocco

Project:

Advertising placement on Russian TV channels.

Scope:

- TV Channels selection based on affinity indices
- Campaign planning and launch
- Help in the adaptation of creative materials
- Third party independent post-campaign report

Result:

- Audience more than 47,5 million people
- Reach 68%



MARRAKECH
COP22/2016/CMP12

[Learn more](#)

RMAA is a cross-border marketing agency
dedicated to connecting brands with
Russian-speaking audience.

office@rmaa.agency



We provide marketing solutions for
global travel brands to conquer the
Russian outbound tourism market.

