



OUTBOUND TRAVEL FROM RUSSIA

- OUTCOMES OF 2017
- OUTLOOK FOR 2018

Prepared for MITT' 2018

13 March 2018

Mitt
TOURBUSINESS 365

GAME CHANGERS



DATA SOURCE

RusIndex – quarterly survey

Largest Russian nationwide research into consumers of goods and services

- **400** categories
- **3000** brands
- **300** lifestyle related statements



Target group

Russian population aged 10 - 75

Geography

50 Russian cities with a population of over 100,000 people

Sample

25 700 respondents (13 700 households) per year

Method

Offline survey

[Read more at our web site >>](#)

BIG TRAVEL BLOCK (16+)

- Trips within Russia and outbound
- Trips abroad:
 - Type of trips
 - Number of trips and duration
 - Travel agencies services usage. Travel companies
 - Destinations
 - Hotels
 - Means of transport
 - Expenses per person
 - Travel as lifestyle



GAME CHANGERS



DATA SOURCE

Ipsos Global@dvisor

GLOBAL SURVEY

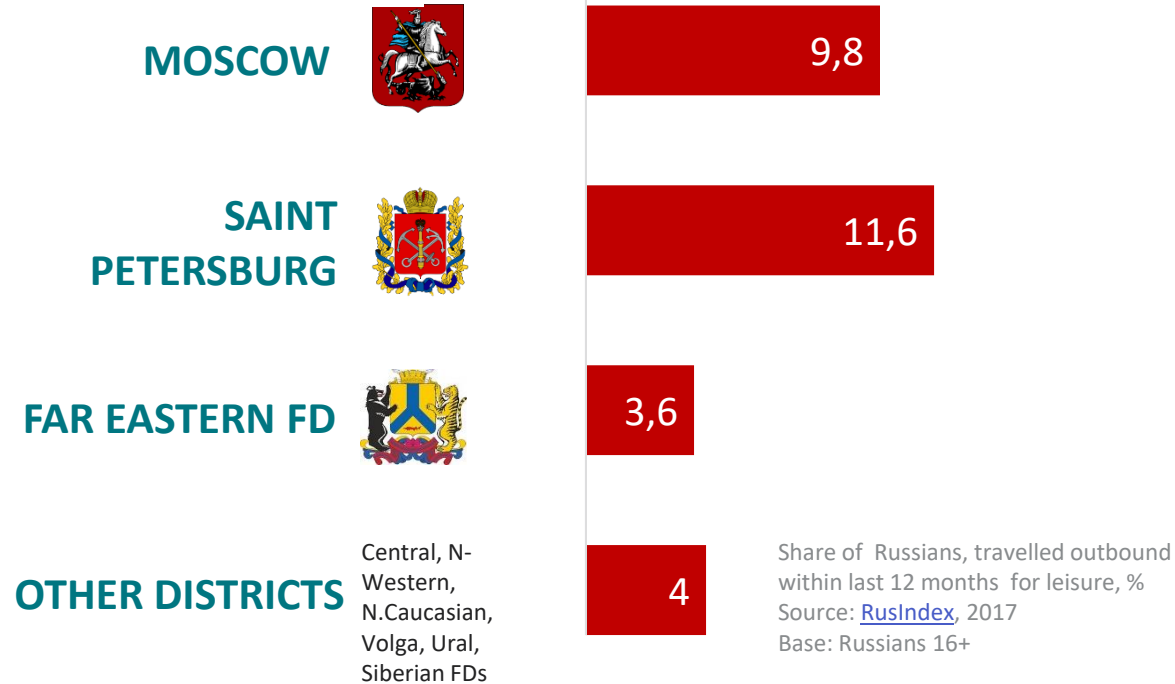
- **27 countries around the world:** Argentina, Belgium, Mexico, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Turkey, Hungary, Australia, Brazil, Canada, China, France, Germany, Great Britain, India, Italy, Japan, Spain, United States, Peru, Chile, Malaysia and Serbia.
- **20 000 adults aged 18-64** in the US, Israel and Canada, and **age 16-64** in all other countries, were interviewed.
- **~1000+** individuals per country, with the exception of Argentina, Belgium, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden Turkey, Hungary, Peru, Chile, Malaysia, and Serbia where each have a sample **~500+**.
- **Ipsos Online Panel system**

SAMPLE IN RUSSIA:
AGE 16-64, N=500*



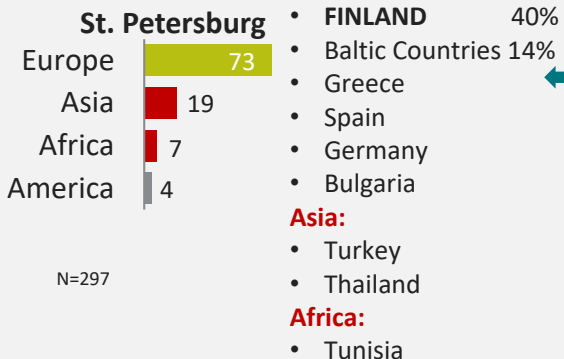
*Due to Online method Russia produces a national sample that is more urban & educated, and with higher incomes than their fellow citizens. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.

St. Petersburg and Moscow Travel More Compared to Other Regions



Different Regions – Different Directions

Tourism from Europe:



Saint Petersburg

Higher than total

Lower than total

Moscow

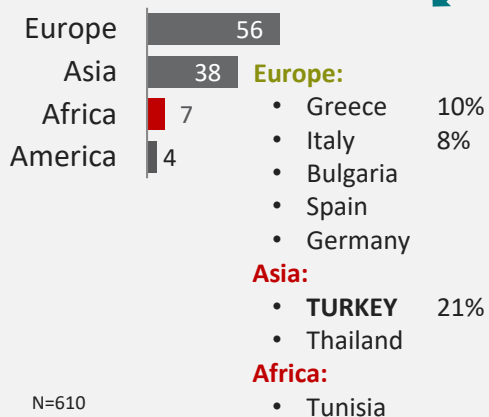
Volga FD

Ural FD

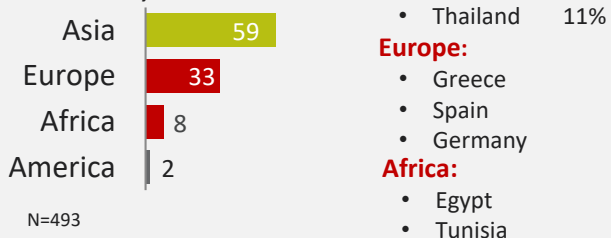
Siberian FD

Far Eastern FD

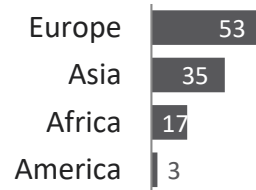
Tourism from Moscow



Tourism from Volga, Ural, Siberian FD

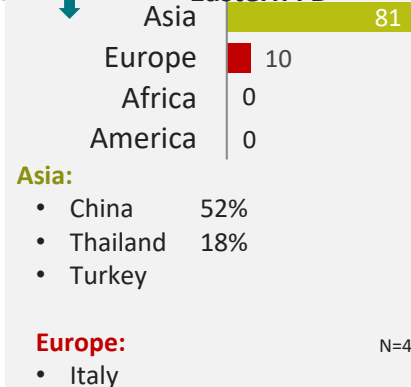


Travel destinations



Source: Ipsos Comcon. [RusIndex](#), 2017
Base: Russians 16+ travelled outbound (all types of travel except business, study, shop tours)

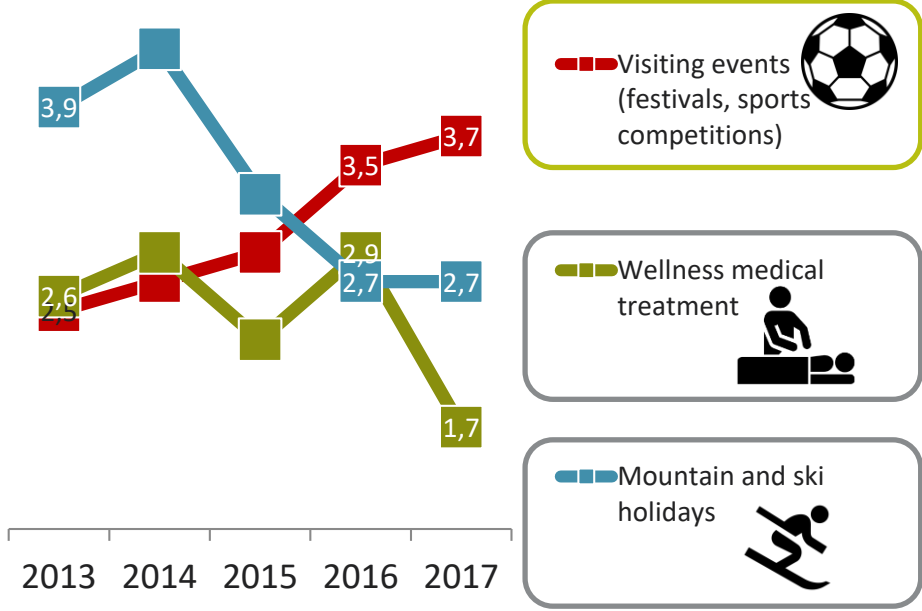
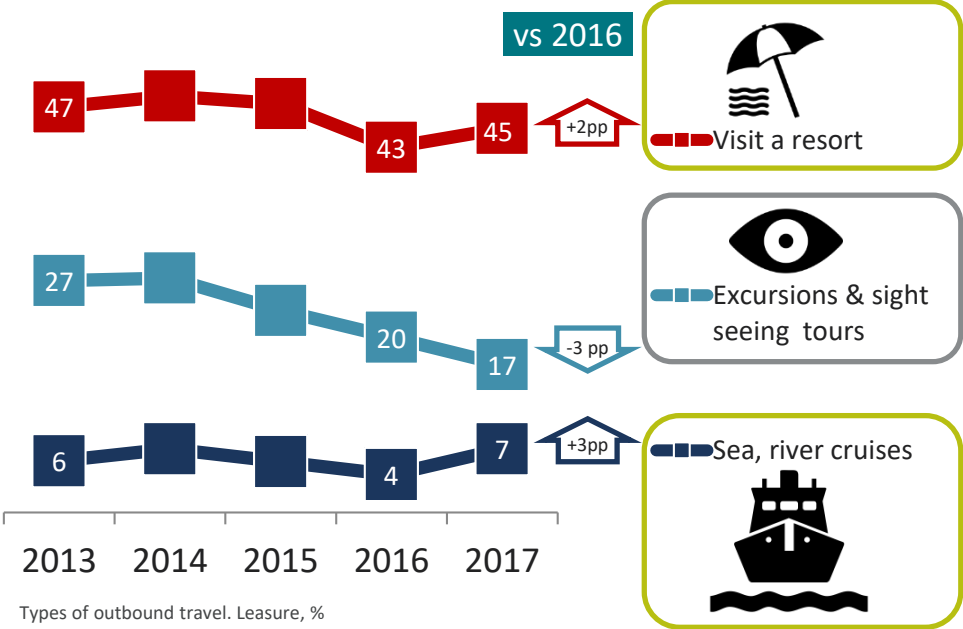
Tourism from Far Eastern FD



GAME CHANGERS



Which Leisure Activity Lost the Most of Russian Tourists

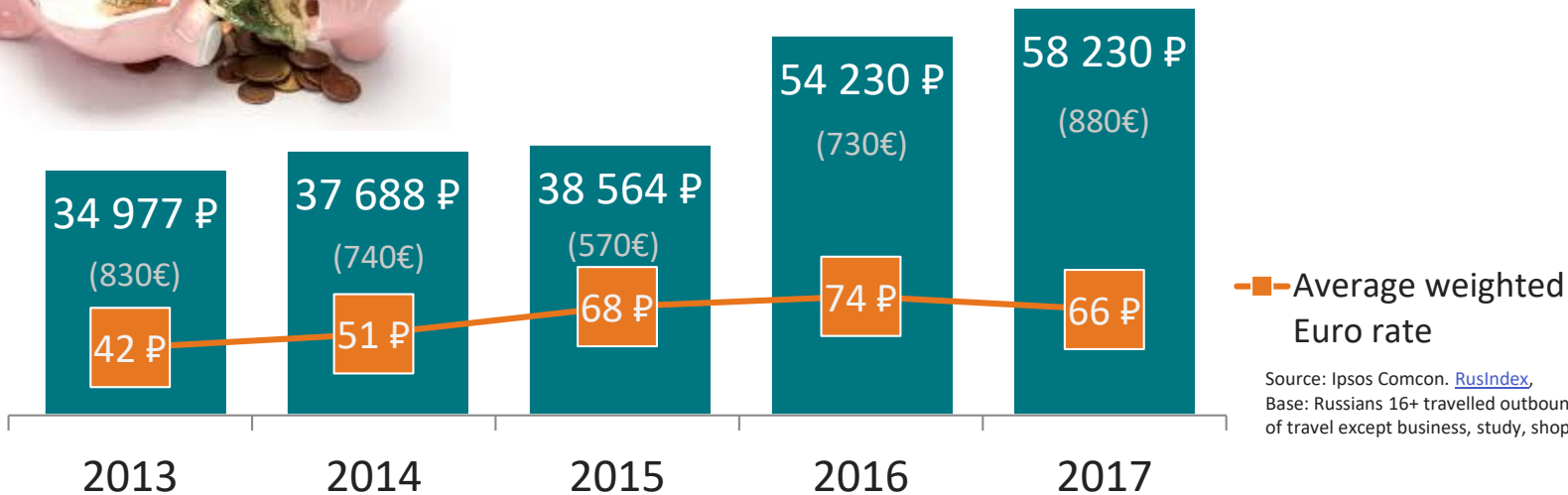


Types of outbound travel. Leisure, %
 Source: [Rusindex](#), 2013-2017
 Base: Russians 16+ travelled outbound (all types of travel except business, study, shop tours),%

Stat. significant growth/drop

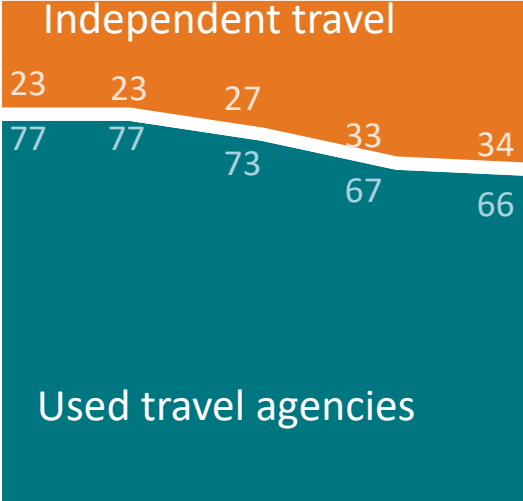
Average Spend per Person

AVERAGE SPEND PER PERSON IN 2017
INCREASED BY +7% COMPARED TO 2016



Source: Ipsos Comcon. [Rusindex](#),
Base: Russians 16+ travelled outbound (all types
of travel except business, study, shop tours)

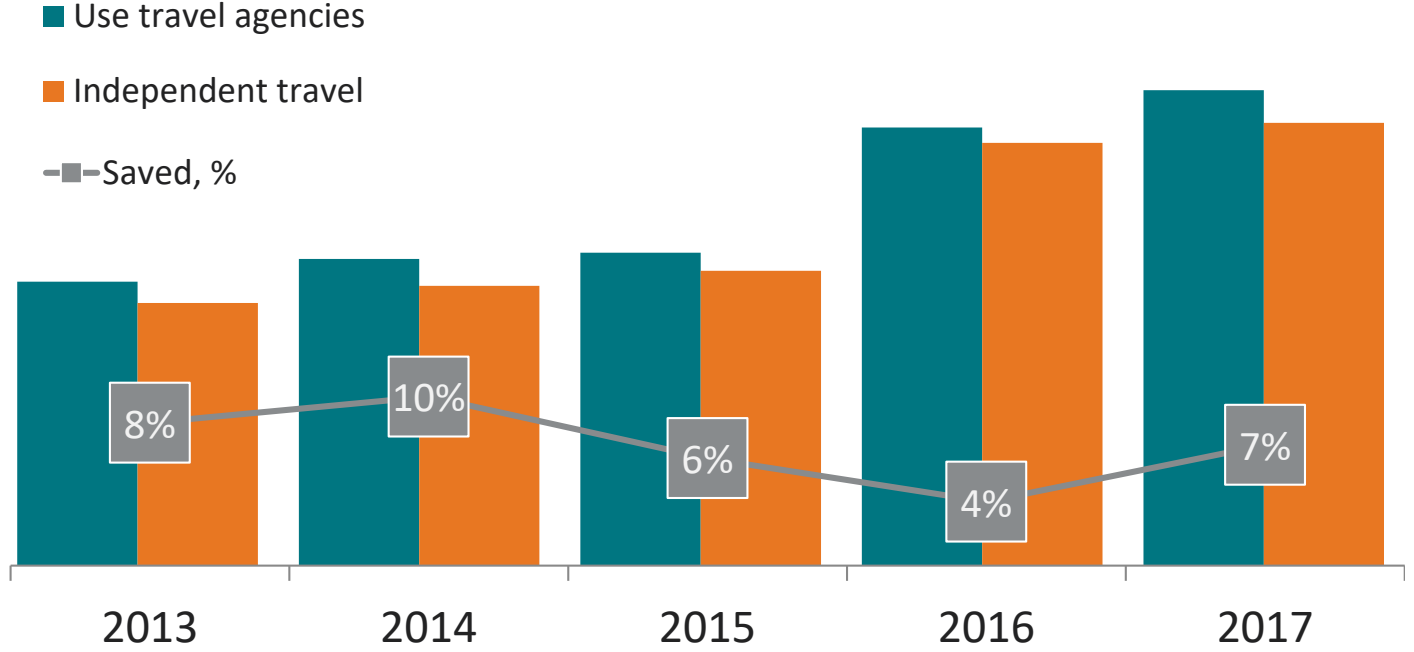
Travel Agency or Independent Booker?



2013 2014 2015 2016 2017

Source: Ipsos Comcon. [RusIndex](#), 2013 - 2016
 Base: Russians 16+ travelled outbound (all types of travel except business, study, shop tours)

The Spend Gap Between Independent Travelers & Those Booking via a Travel Agency Grew

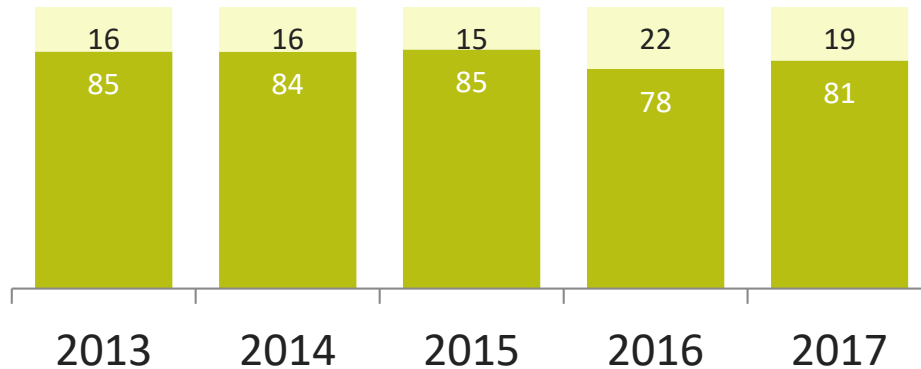


Source: Ipsos Comcon. [RusIndex](#)
Base: Russians 16+ travelled
outbound (all types of travel except
business, study, shop tours)

Duration and Accommodation Bookings

■ Didn't use hotels services

■ Used hotels services



Source: Ipsos Comcon. [Rusindex](#), 2013-2017

Base: Russians 16+ travelled outbound (all types of travel except business, study, shop tours)

- In 2017 52% travelled outbound for 1,5-2 weeks. Significantly grew share of those travelled for 1 week (+6pp). Significantly decreased share of those travelled longer than 2 weeks (-5pp).
- The most popular are 4* hotels
- In 2017-m share of 4* hotels users increased +2pp; 3* hotels decreased -3pp
- Usage of 5*hotels, 2* hotels and hostels didn't change

Outlook for 2018

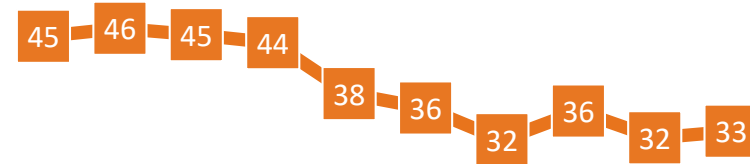
Trends and environment



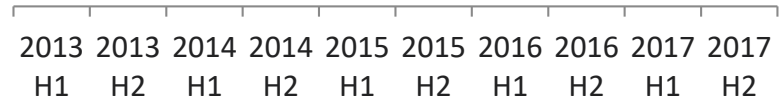
Financial Self-Estimation

Financial situation self-estimation scale	Target Audience for Outbound Travel
Have no financial difficulties	YES
Have enough money for everything except for real estate purchase	YES
Have enough money for large household appliances	YES
Have enough money for food and clothing but not for large household appliances	no
Have enough money for food but not for clothing	no
Hardly have money for food	no

TOP3 fin. self-estimate



In 2016/H2 financial situation of Russian households stopped falling and is stable for two years in a row

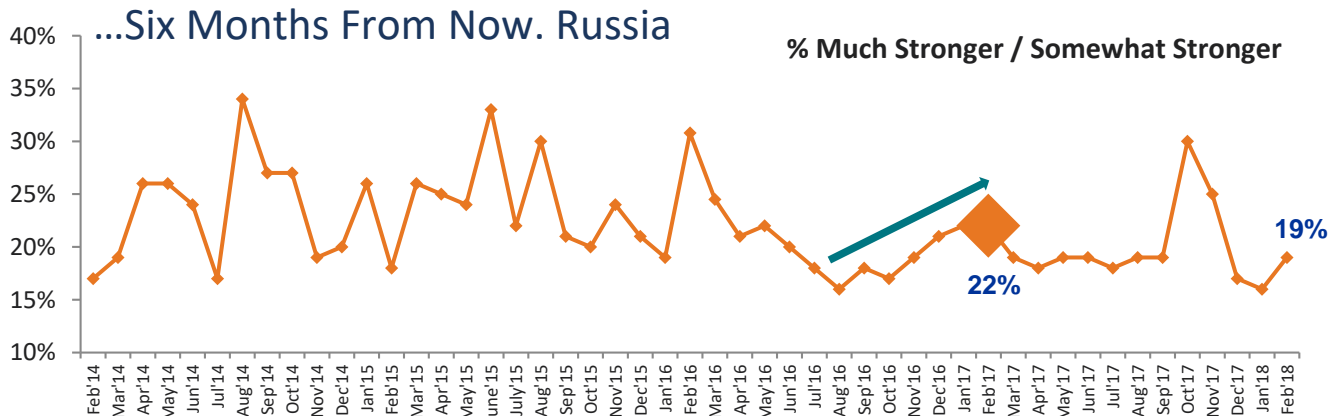
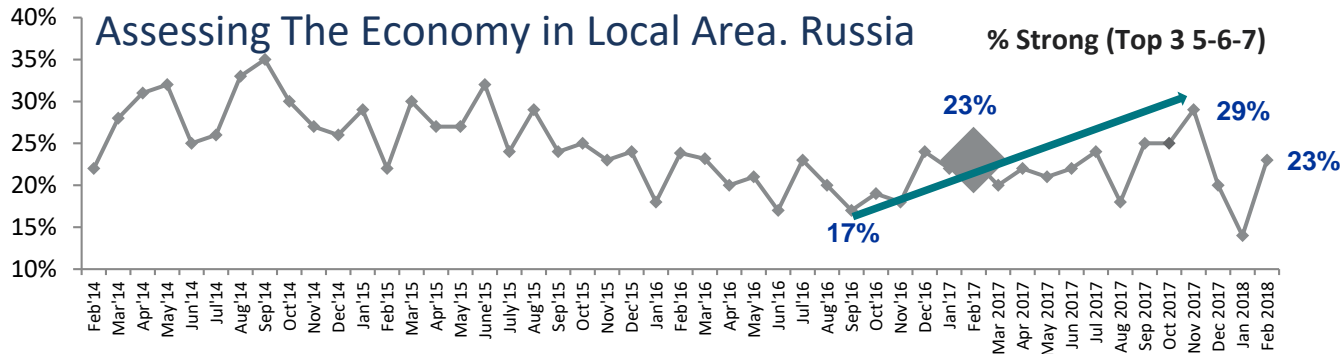


Russian Households. Financial self-estimation TOP3 (Have no financial difficulties or Have enough money for everything except for real estate purchase or Have enough money for large household appliances)

Source: [RosIndex](#), 2013-2016

Russia. Economic Pulse

Rate the current state of the economy in your local area using a scale from 1 to 7, where 7 means a very strong economy today and 1 means a very weak economy.



Looking ahead 6 months from now, do you expect the economy in your local area to be much stronger, somewhat stronger, about the same, somewhat weaker, or much weaker than it is now? © 2018 Ipsos.



The survey is conducted monthly in 26 countries around the world via the Ipsos Online Panel system.
Sample size in Russia = ~500+, aged 16-64

GAME CHANGERS



Trends to Influence Travel



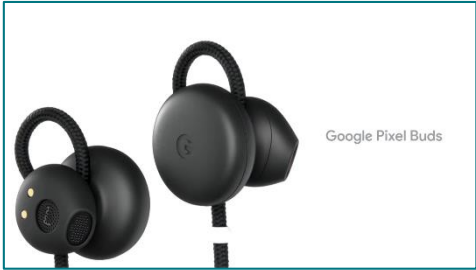
Russians refuse from Dachas



GenZ:
“I want to see a happy face in the mirror”



Active aging: “I deserve good rest or I continue working and have money to travel”

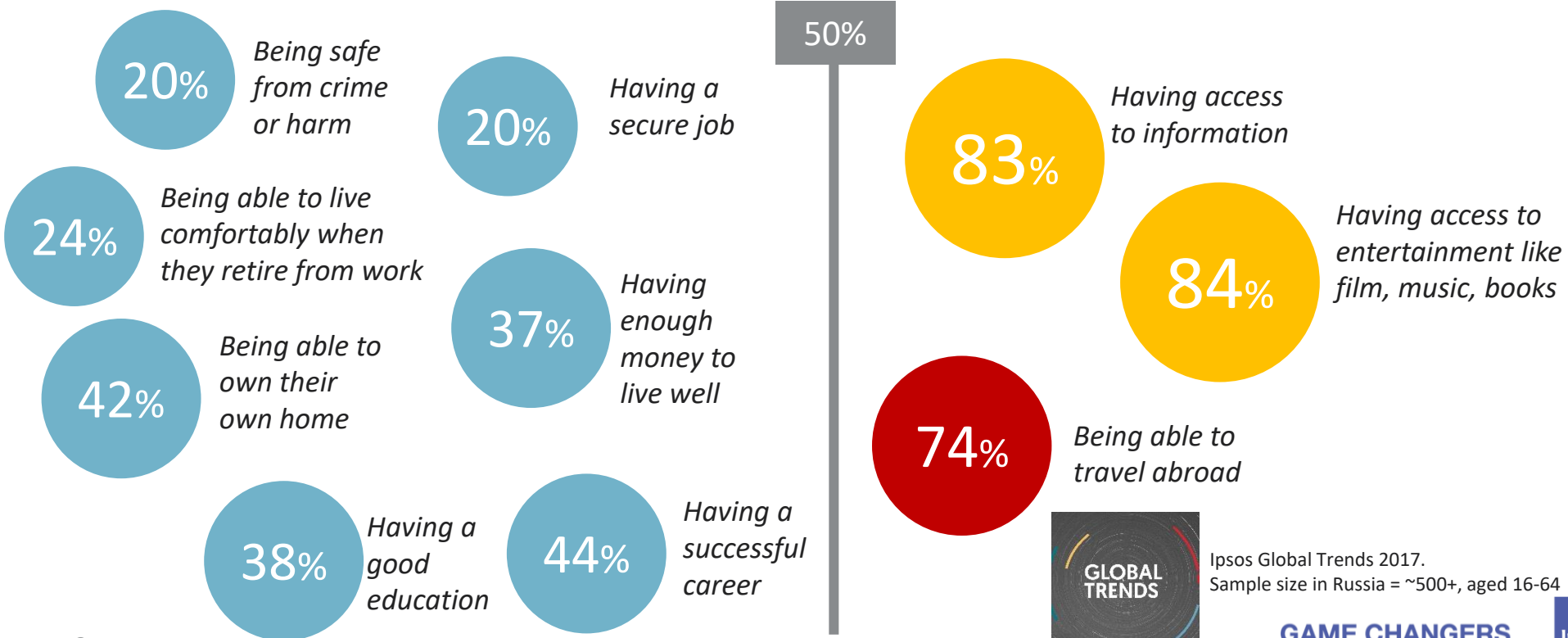


Real-time translation by Google Babel-Fish Earbuds

Now

Close Future

Which of these do you think is or will be better or worse for today's youth than for their parents? Russia, % better



Ipsos Global Trends 2017. Sample size in Russia = ~500+, aged 16-64

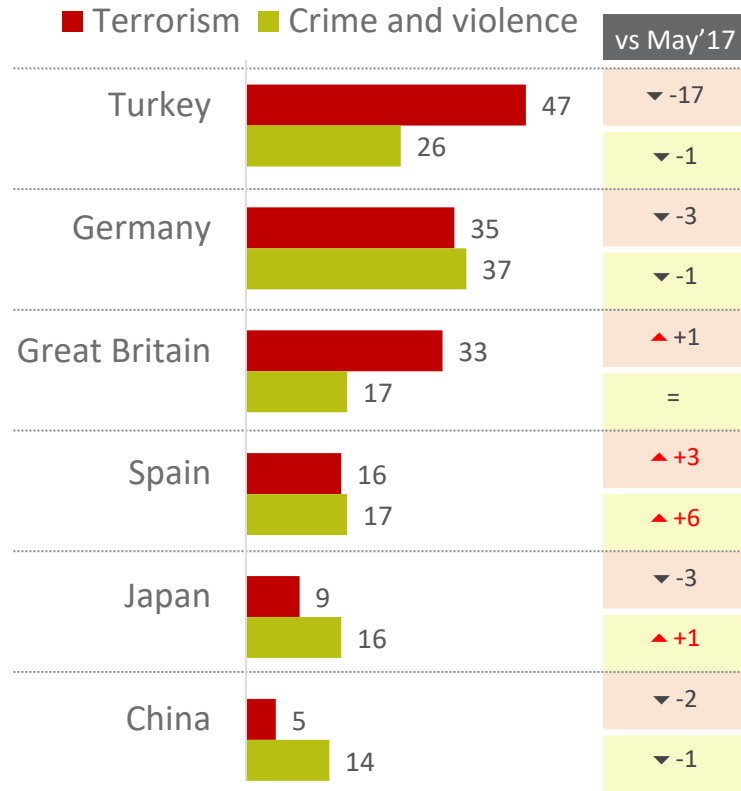
GAME CHANGERS



Safety in Numbers



What Worries the World?



Q Which three of the following topics do you find the most worrying in your country?

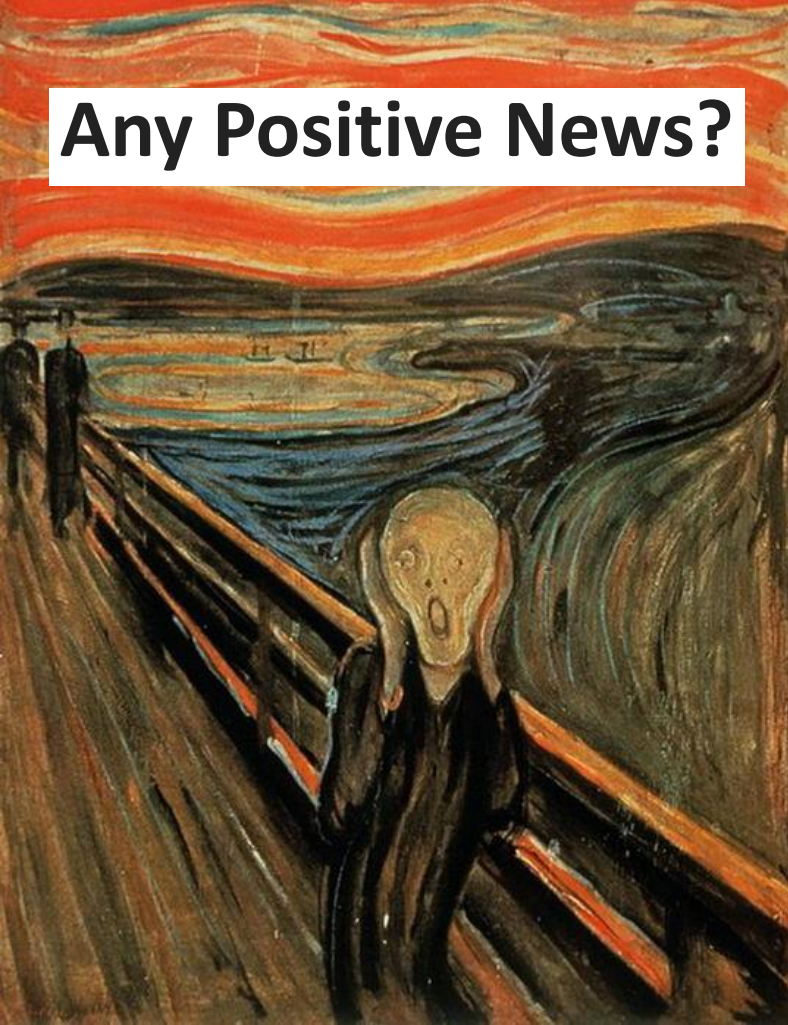
Source: Global@dvisor, Dec 22nd 2017 - Jan 5th 2018

[Read the report "What Worries the World", Jan 2018](#)

GAME CHANGERS



Any Positive News?

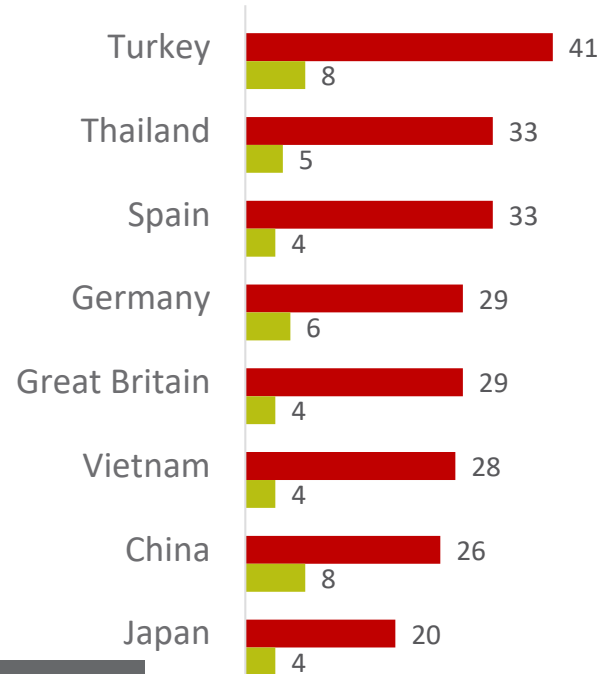


Impact on Travel Plans of Russians to Various Destinations

MAX (Neg)

■ Negative impact

■ Positive Impact



MIN (Neg)

Q Have recent events you have **SEEN OR READ IN THE NEWS** made you more likely or less likely to travel to the following countries?

Source: Global@dvisor, Apr-May 2017
Russians 16-64, N=500

[Read the report "Recent Events' Impact on International Travel Plans"](#)

GAME CHANGERS





Mila Novichenkova

Marketing and
Communications Director

✉ mila.novichenkova@ipsos.com



Tatyana Gerasimenko

Associate Client Service Director

✉ tatyana.gerasimenko@ipsos.com