



RUSSIAN OUTBOUND TOURISM: WHERE NEXT?

A CHANGING MARKET

Russian holidays destinations were once predictable – but now the market is wide open.



Russia's outbound travel sector has been a growth story for many years. Tourism levels grew 48% between 2008 and 2014, and there is appetite for this to continue. But 2015 and 2016 were tough years - and the market has had to adapt.

New destinations are emerging as firm favourites for Russian tourists, while other, well established countries are noticing numbers drop off. Additionally, relaxation

of visa requirements, and an expanded number of outbound flights from primary Russian airports, is making travel an easier, more attractive proposition for Russian tourists. While numbers have suffered in 2015 and 2016 due to the weakening of the rouble, the fundamentals that have driven outbound growth in the 21st century so far remain strong.

Even with the growth the market has seen

so far, the potential for outbound travel is enormous. As late as 2010, only 15% of Russians had ever taken a holiday abroad, which leaves millions of potential new tourists - and existing ones - for destinations to attract. In this report, we will show you how the countries around the world are doing just that.

THE FIVE TYPES OF RUSSIAN TOURIST

Every Russian tourist is different – but segments do exist.

Here are the five general categories of Russian tourist that destinations can target.

SUNSEEKERS

Russians looking for their two weeks in the sun abroad traditionally head to Turkey and Egypt, but 2016 changed all this. Now, new destinations are picking up the demand, including Greece, North Africa and the Middle East – as well as old favourite Thailand.

VISITING FRIENDS AND RELATIVES

The Russian-speaking diaspora is enormous and widespread. Millions of Russians in the Baltic countries, Germany, Finland and elsewhere attract their relatives and friends every year – swelling tourist numbers to these countries.

ULTRA-WEALTHY

Few in number, but long on spending power. Most often found giving a boost to tourism industries around the Mediterranean and Caribbean.

YOUNG PROFESSIONALS

Russia's growing middle class travels more than ever, and the range of destinations is at an all-time high. City breaks in Europe and adventures further afield are what catches their eye.

THRILLSEEKERS

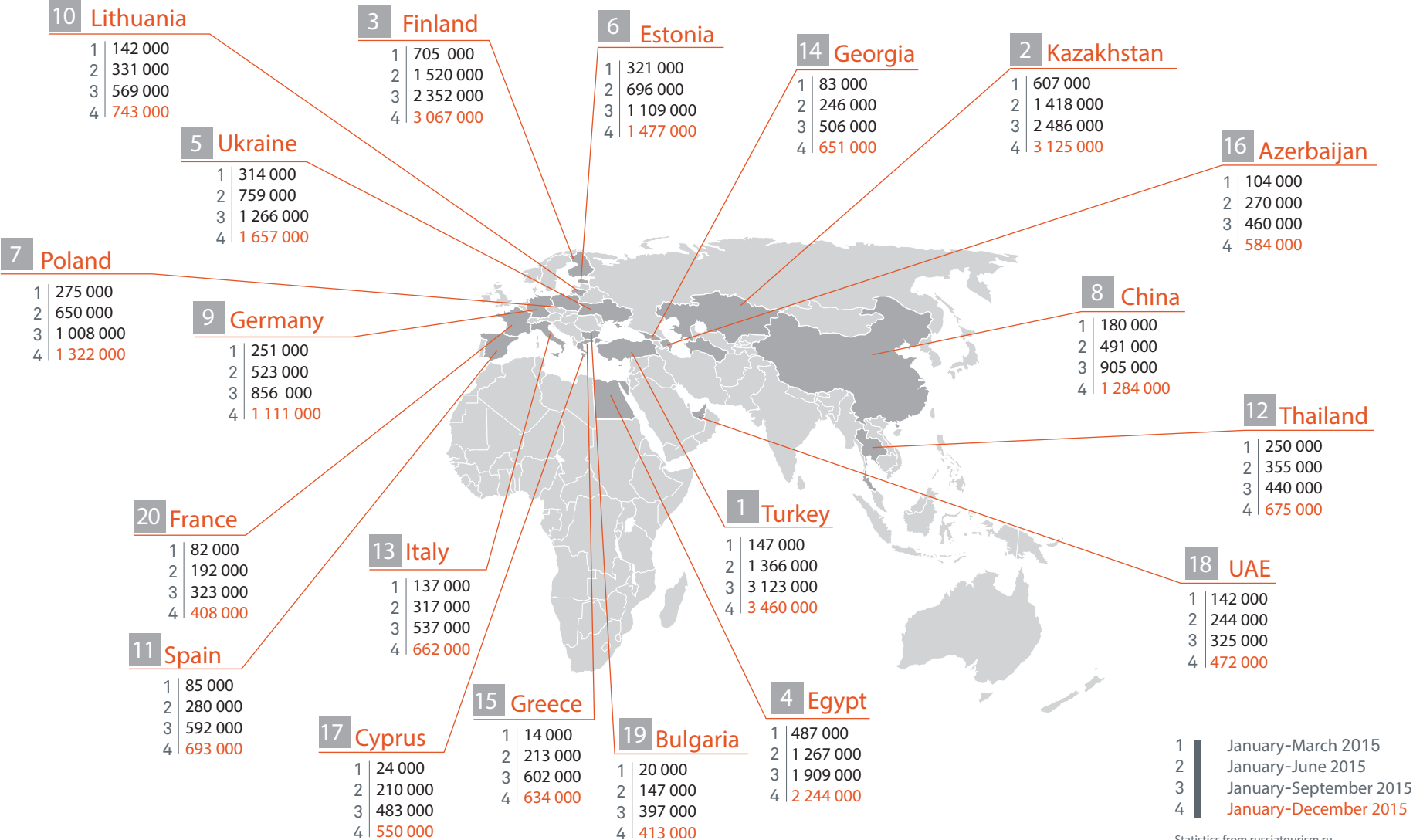
For this category, sun and sand is not enough – they want adventure. These Free Independent Travellers are most keen to check out Asia and South America.

THE MARKET: DESTINATION BY DESTINATION



GREECE
SPAIN
ITALY
MONTENEGRO
EGYPT AND TURKEY
CENTRAL EUROPE
SOUTHEAST ASIA
EAST ASIA
CAUCASUS
ISRAEL
CARIBBEAN AND CENTRAL AMERICA
SOUTH AMERICA
IRAN
MIDDLE EAST
NORTH AFRICA
FRANCE AND GERMANY
SCANDINAVIA

TOP 20 RUSSIAN OUTBOUND TOURIST DESTINATIONS 2015



1 | January-March 2015
 2 | January-June 2015
 3 | January-September 2015
 4 | January-December 2015

Statistics from russiatourism.ru

GREECE

With other previously popular destinations seeing numbers fall, more Russians than ever are heading to Greece for its unique combination of climate and culture. 135% more Russian tourists visited from January to April 2016, according to the Russian Tour Operators Society. Greece's rich heritage has long been a massive draw for tourists, and more air routes are making it easier for Russians to experience everything Greece has to offer.



KEY STATS

634,000	Russian tourists to Greece, 2015
EUR953	Average Russian tourist spend in Greece
135%	More Russians in Greece, Jan-Apr 2016

WHY RUSSIANS ARE GOING THERE:

- Growth in arrivals to Greek regional airports. A slew of extra routes for 2016, including new connections from St. Petersburg to Thessaloniki, Heraklion, Zakynthos and Corfu, have increased the choice for Greece-bound Russians. The result – a 21% growth in Russian arrivals to Greek regional airports in the first six months of 2016.
- Taking tourists from Turkey and Egypt. Various troubles in Turkey and Egypt have increased demand for 'safer' locations like Greece. This drove 15% growth in demand for Greek holidays in 2016 among Russian travellers.
- The recent religious revival in Russia means Greece's monasteries and pilgrimage sites are attracting more visitors, as both countries share the Orthodox Christian faith as their main religion.

SPAIN

Russians were the 10th largest group of foreign tourists visiting Spain in 2015, with over 693,000 travellers. Spain is keen to attract more Russians and a relaxation of visa requirements led to a 25% increase in demand for Spanish resorts across the summer of 2016. The demand has transferred to a greater tourist flow - 15% more Russians in the first half of 2016.



KEY STATS

693,000	Russian tourists to Spain 2015
25%	More Russians at Spanish beach destinations, first half of 2016
13%	Rise in Russian tax-free spend, March 2016

WHY RUSSIANS ARE GOING THERE:

- Barcelona is a star performer. A 2016 survey of Russians from 126 cities showed that Barcelona was the number two 'dream destination' for Russians, behind only New York. New links from Moscow and St. Petersburg for summer 2016 is helping to meet that demand.
- Flight connections are growing by the week. It is not just Barcelona getting new routes – summer 2016 launches include Moscow-Ibiza and Moscow-Malaga.
- Like Greece and Cyprus, Spain has benefited from Russian travellers' temporary inability to holiday in Turkey or Egypt. Spain's beach destinations saw a 25% increase in Russian visitors in summer 2016.

ITALY

Italy has launched a number of services to grow its presence in the Russian market, including a growth plan for all-inclusive, and reaction has been positive. The country has long been popular among Russian tourists for its shopping and city break options, and now operators are looking to make the most of Italy's enormous variety to attract Russian tourists in all price categories. Also, a nimble pricing strategy has helped some Italian operators grow numbers by up to 40% in summer 2016.



KEY STATS

662,000	Russian tourists to Italy 2016
8 nights	Average Russian length of stay in Italy, 2014
EUR1.3m	Russian tourist spend in Italy 2014

WHY RUSSIANS ARE GOING THERE:

- Growth in all-inclusive. Italian tour operators in the region of Emilia-Romagna are boosting all-inclusive options – essential for attracting Russian visitors keen to ensure maximum relaxation on their trip.
- Italy has it all – beach holidays, city breaks, wine tourism, and more – meaning the country caters for all Russia's main tourist segments. This range of offerings helped push demand for Italy trips in autumn 2016 up 37%, according to Russian tour operator BSI Group.
- More flights. Russia-Italy air links are keeping pace with the growing demand from Russian travellers. In 2016, Ekaterinburg-Rome, Moscow-Venice and St. Petersburg-Naples links were launched, and a new Russian consulate opened in Rimini airport to help tourists in the 2016 season.

MONTENEGRO

Montenegro's coastal resort of Tivat has become one of the most popular European destinations amongst Russian tourists. Situated on the Adriatic Coast, Montenegro offers Mediterranean weather, exceptional accessibility and is one of the few European countries to deliver visa-free travel for Russians. Just short of 300,000 Russian tourists made the trip to Montenegro in 2015 - down on the previous year, but the fundamentals are strong for a return to growth in future.



KEY STATS

299,000	Russian visitors to Montenegro, 2015
9+ nights	Average Russian stay, 2015
100+	Russia-Montenegro flights per week

WHY RUSSIANS ARE GOING THERE:

- Visa-free. Not many European countries have abolished visas for Russian citizens, but Montenegro is one of them – travellers can simply fly in with their passports.
- Russians spend a long time there. The average length of stay among Russian visitors is over nine days, making these travellers a valuable demographic for Montenegro's travel industry.
- Lots of flight options. Montenegro's success with Russian inbound travel is reflected by the enormous amount of flights coming to the two main hubs of Tivat and Podgorica. Moscow, St. Petersburg, Ekaterinburg, Chelyabinsk and Samara are all reachable by direct charter flight.

EGYPT AND TURKEY

Turkey and Egypt were the two stars of Russian tourism, but for two different reasons the flow of Russians completely dried up. Egypt is still off the departure board for Russian tour groups, but as this report went to press Russia-Turkey relations are on the mend, and packages are being sold again. The restoration of ties will come too late for Turkish resorts to salvage much from 2016 – but the fundamentals behind Russia’s love for the country are unchanged.



KEY STATS

3,460,000	Russian visitors to Turkey, 2015
2,244,000	Russian visitors to Egypt, 2015
87%	YOY fall in Russians to Turkey, 2016

WHY RUSSIANS ARE GOING THERE:

- The Russia-focused tourist infrastructure in Egypt and is unparalleled. Hotel staff, waiters and tour operators across the main destinations are comfortable speaking Russian, and this will keep bringing tourists when trips to Egypt start again.
- Turkey’s popularity has survived the travel ban. As soon as packages to Turkey were back on the menu, studies started to appear in Russia showing the demand for trips to the old favourite. The most recent, published at the beginning of August, had Turkey in fourth place on Russians’ wish list for autumn breaks – showing Turkey will pick up where it left off.
- Tour operators restarted tours to Turkey as soon as they were allowed to. Airlines are restarting their package routes, and there are even some new launches – such as the St. Petersburg – Antalya link announced in August 2016.

CZECH REPUBLIC, HUNGARY, POLAND AND SLOVAKIA

The 'Visegrad Four' are traditionally popular destinations for Russian tourists, offering city breaks, spas, skiing and a wide range of nature. High Russian-language proficiency among the older generation makes a holiday here very easy for Russians of all ages. Poland welcomes over half of all tourists to the area, ranking in the top 10 Russian outbound destinations. Slovakia is having a particularly good 2016 – numbers from January to May are 24% up on 2015.



KEY STATS

1,467,000	Total Russian visitors 2015
\$334	Average Russian spend in Poland, 2015
24%	Rise in Russian visitors to Slovakia, Jan-May 2016

WHY RUSSIANS ARE GOING THERE:

- The market for short breaks is a strong one. Krakow, Prague and Budapest all see heavy tourist flows from Russia, with history, architecture and cuisine the top draws.
- Central Europe still has many Russian speakers working in the hospitality trade – more than Western Europe, at least. Russians can be fairly sure of finding a speaker of their language when they holiday in these countries – 42% of all Czechs speak Russian, primarily aged 40 and up – and this gives Russians more confidence in visiting Central Europe.
- The Visegrad Four offers a wide range of options for travel, meaning advertising campaigns can target a wide range of travellers. Skiing is available in Poland and Slovakia, wellness and medical tours in Hungary, and city breaks in Poland are the best known among Russians - but all four countries have these areas covered.

SOUTHEAST ASIA

Already popular with Russians, Southeast Asia is benefiting from a rapidly growing flight network with Russia. Vietnam has experienced record numbers of Russian visitors – with 21% more tourists hitting the country in the first half of 2016 alone. Thailand has long been established with Russians. A huge infrastructure catering for Russian tourists is already in place, and increased demand led to Thai Airways restarting direct services from Moscow in 2016.



KEY STATS

675,000	Russian tourists to Thailand 2015
321,000	Russian tourists to Vietnam 2015
21%	Rise in tourists to Thailand, Jan-Jun 2016

WHY RUSSIANS ARE GOING THERE:

- An established destination, particularly Thailand. Huge numbers of Russians – 675,000 in 2015 – visit Thailand every year, and this gives a solid base to launch new initiatives. One such drive is a plan to open up lesser-known regions of Thailand to Russian tourists, announced in August 2016.
- More flight routes, including from regional cities. The big news is Thai Airways coming back to the market, but Russian airline S7 launched routes from Vladivostok to Bangkok in Autumn 2016 as well. This complements existing links from Novosibirsk, Irkutsk and Krasnoyarsk.
- A joint effort from the whole region. Cambodia, Laos, Myanmar, Vietnam and Thailand used a 2016 industry event to announce 'CLMVT linkage', a cooperation plan to attract tourists –centred on increasing the number of regional flights between them to allow easier connections.

EAST ASIA

Located comparatively close to Russia, East Asian countries like China and Japan are the destinations of choice for tourists on all budgets. From the sumptuous luxury tourists hotspots of Japan through to the lower budget shopping excursions of northern China, the East has long held an attraction for Russian tourists. Now, operators are making East Asia more accommodating than ever before, and numbers are reflecting this - 45% more Russians visited China in the first half of 2016 than in the previous year.



KEY STATS

1,284,000	Russian visitors to China 2015
\$1bn	Russian tourist spend in China, 2015
33,000	Russian tourists to Japan, Jan-Sep 2015

WHY RUSSIANS ARE GOING THERE:

- Government support. In the southern island of Hainan, for example, the regional government is to start paying direct subsidies to attract Russian tour operators. Tourist board services on the island have also had a revamp, with Russian-language websites to make trips easier.
- Russia is more than just Moscow and St. Petersburg – nearly 40 million Russians live east of the Ural Mountains. This makes China the closest international destination, and short-term business and shopping trips tempt many across the border.
- In Japan, meanwhile, luxury tourism is holding up. High-end tourism is more or less insulated from economic downturns, and Japan is making the most of the stability. Russian tourist numbers stood at 19,000 in the first nine months of 2015, a 30% reduction from 2014, but those remaining are the highest spenders.

AZERBAIJAN, GEORGIA AND ARMENIA

Linguistic and cultural ties, plus a high number of VFR travellers, makes the Caucasus hugely attractive for Russians. Armenia is the third most popular destination for Russian tourists in 2016, Georgia has attracted 20% more tourists in 2016 than in previous years, and Azerbaijan offer some of the cheapest hotel rates in the region. CIS states add a touch of familiarity to Russian vacations while displaying enough uniqueness for a truly well-rounded holiday.



KEY STATS

584,000	Russian tourists to Azerbaijan, 2015
651,000	Russian arrivals in Georgia, 2015
15.7%	Share of Russians among Georgia tourists, 2015

WHY RUSSIANS ARE GOING THERE:

- Language support. As former members of the Soviet Union, these countries give Russians a much easier time linguistically. Russian proficiency in the travel industry is widespread, and Russian tourists know what to expect culturally in these destinations.
- Visiting friends and relatives. This shared history also means many Russians have relatives in the Caucasus, and come to visit them regularly. Take Armenia, for example - 239,000 Russians visited in the first 9 months of 2016, but only 37,000 were recorded as 'tourists'.
- Hotel infrastructure is improving all the time. Azerbaijan is well endowed with luxury venues, but there has been a gap in more affordable options. Now, the Azeri government is pushing for more two and three-star hotels to boost numbers, particularly from Russia and Turkey.

ISRAEL

Half a million Russians are expected to hit Israel in 2016, according to Israel's Minister of Tourism Yarin Levin. Incentives abound for Russian tourists seeking to uncover all Israel has to offer, including unique foods, spectacular landscapes and historical and religious sites. This, plus some well-planned incentives, is helping Israel grow its share in the Russian outbound market.



KEY STATS

414,000	Russian tourists to Israel, 2015
25%	Russian speakers in the Israeli population
#2	Russia's rank in Israeli tourism after USA

WHY RUSSIANS ARE GOING THERE:

- Package subsidies. Israel is taking as direct an action as you can imagine to lure Russian tour operators – paying them. From October 2016 to April 2017, Russian operators selling trips to Israel will receive a subsidy of €45 per passenger.
- New routes are helping lure Russian tour operators to Israel. A Sochi-Tel Aviv route opened in summer 2016, as well as a direct connection between Tel Aviv and the 5 million people of St. Petersburg.
- Religions tourism on the rise - as public religion reappears in Russian society, more and more Russians are combining sightseeing with trips to the Holy Land.

ISRAEL: THE VIEW ON THE GROUND

INTERVIEW WITH KSENIA KOPYAKOVA, DIRECTOR FOR RUSSIA AND THE CIS COUNTRIES, ISRAELI MINISTRY OF TOURISM

How many Russian tourists visit Israel each year?

According to statistics prepared by the Central Bureau of Statistics, 3,108,597 tourists visited Israel in 2015. In regards of Russian statistics, 414,617 Russian tourists visited Israel in 2015. The statistics shows that the number of Russian tourists constitutes 13.3% of total tourist flow – Russia occupies the second place after the USA.

Has the number of Russian tourists changed in recent years?

Due to the unfavorable economic situation the demand of Russian tourists for the outbound travel – in Russia, the past year was one of the most difficult ones for all the industry players on the Russian market. And Israel is not exclusion: the tourist flow has declined recently.

Like other countries we are profoundly concerned about the current situation in tourism industry, but we in the ministry perceive every obstacle as a challenge, a new opportunity.

What makes Israel an attractive destination for Russian tourists?

First of all it is a centre of three major monotheistic religions. It is a country where it all began. Secondly, it is an attractive travel destination for tourists from all over the world. It can be explained by the following factors: nice weather all year round, three seas, historical monuments, a large number of cultural events and opportunities for therapeutic, active, cultural, medical and culinary tourism.

Besides, for Russian tourists there are even more advantages: a short flight, the country is visa free and the fact that about one fourth of the Israeli population speaks Russian – there won't be any communication problems for sure.

What are Israeli tour operators doing to attract Russian tourists?

Israeli tour operators are very active. They often go to Moscow to visit various exhibitions and fairs in order to get the latest news regarding Israel, to understand the needs of Russian market and Russian tourists and to be able to offer their clients

the best product possible. They offer a variety of tourism products and tour packages for every kind of tourists and of course, they give a lot of discounts and bonuses such as free excursions to attract Russian market.

In June, for the first time in Moscow, Israel Ministry of Tourism has hosted the workshop to present 5 Israeli regions: Jerusalem, Tel Aviv, Netanya, The Dead Sea and Eilat. Tour operators, hoteliers and various Israeli associations visited Moscow to meet with Russian tourism industry representatives.

What are the current Russia-Israel flight options?

A direct flight from Moscow to Tel Aviv takes about 4 hours. At the moment there are direct flights from Moscow, St. Petersburg, Rostov-on-Don, Ekaterinburg and Krasnodar. Besides, recently the Israel Ministry of Tourism announced a new successful programme. It's aimed to encourage the launch of new direct flights from Russian regions to Ben-Gurion airport.

CARIBBEAN AND CENTRAL AMERICA

Offering a range of holiday options from luxury to all-inclusive to adventure travel, the Caribbean and Central America is ideally suited for Russian tourists. Now, visa procedures have been streamlined by several nations in the region – ensuring Russians can visit with little to no hassle. A major destination is the Dominican Republic - after a fall in numbers in 2015, the country is repairing its market share with new flight links and investment in infrastructure.



KEY STATS

71,500	Russian tourists to Dom. Rep, 2015
24,000	Russian tourists to Mexico, 2015
38,100	Russian tourists to Cuba, 2015

WHY RUSSIANS ARE GOING THERE:

- New flights to the Dominican Republic. After a \$600 million government investment in the Dominican Republic's tourist infrastructure, operators are starting to come – including Russian ones. 24% more Russian tourists came in the first half of 2016, and this will rise further now charter flights have been launched from both Moscow and St. Petersburg to Punta Cana, the Dominican Republic capital.
- Russians can soak up the Caribbean sun with very little paperwork. Costa Rica became visa-free for Russians in 2014, joining the Bahamas, Jamaica and Panama. The Dominican Republic takes \$10 per visitor for a 'tourist card', but this is issued on arrival.
- Options across the region. It is not just the main destinations seeing growth - 24% more Russian tourists (over 4,500) visited Panama in 2015, for example, and 3,000 more visited Costa Rica.

SOUTH AMERICA

While visitor numbers for Russians in South America are currently low - no South American country is in the top 50 outbound destinations for Russian tourists - the figures are growing and there is a huge opportunity for expansion. As well as key destinations Brazil and Argentina, smaller countries claim their share too - over 6,000 Russian tourists visited Ecuador in 2015, and both Chile and Peru managed to grow their numbers in 2015.



KEY STATS

25,600	Russian tourists to Brazil, 2015
13%	More Russians to Peru, Jan-Jun 2016
300%	More Russians to Chile, Jan-Jun 2016

WHY RUSSIANS ARE GOING THERE:

- Visa reforms. Russians have a smooth path into South America – only Suriname, French Guiana and Bolivia demand a visa after reforms (Bolivia issues them on arrival). This makes South America, statistically, the most welcoming continent for Russian travellers.
- Adventure tourism. As well as the Iguazu Falls, many Russian visitors to Argentina venture to the wide expanses of southern Argentina - the plains of Patagonia and the city of Ushuaia make a strong contribution.
- Events in Brazil. The football World Cup and the 2016 summer Olympics have led to a rise in Russian visitors to Brazil, but the fundamentals are strong to keep them there - the northern areas of Brazil are ideal for free independent travel and adventure tourism in small groups.

IRAN

Iran's huge untapped potential for tourism is ready for Russians. Many cities in Iran date back to the dawn of civilisation, and are protected UNESCO World Heritage Sites. Elsewhere, Persian cuisine is coupled with a well-established network of over a thousand world class hotels and resorts, providing a complete holiday experience. What's more, having been off limits for so long, a certain mystery permeates Iran – making the country all the more enticing to Russians.



KEY STATS

\$1.3bn	Spent by all tourists in Iran, 2015
20 million	Iran's tourist target by 2025
240%	Growth in Russian tourism to Iran, 2015

WHY RUSSIANS ARE GOING THERE:

- Visa restrictions between Russia and Iran were eased substantially in February 2016 – now, Russians can get a 30-day visa upon arrival in Iran for a fee of around \$80.
- Iran's potential for cultural tourism is up there with the best – one of the main reasons why over 4 million tourists came as early as 2014. One of the cradles of Eurasian civilisation, Iran's draws include the holy city of Qom, the ancient towns of Isfahan and Mashad, and the Persian ruins of Persepolis.
- Iran is a fresh destination – as Russians become more adventurous in their travel, previously closed destinations like Iran are attracting the first wave of thrillseekers.

MIDDLE EAST

Russian tourists are turning more and more towards the Middle East to provide them with an unforgettable vacation experience. Why? Blazing heat, crystal clear waters, modern, tourist friendly cities and pro-Russian operators – not to mention visa reforms – have helped create a highly attractive atmosphere. Top destinations are the United Arab Emirates (mainly Sharjah, Abu Dhabi, Dubai and Ras Al Khaimah) and the culture, beaches and spas of Jordan.



KEY STATS

472,000	Russian tourists to UAE, 2015
20,000	Russian visitors to Jordan, 2015
36,000	Russian tourists to Qatar, 2015

WHY RUSSIANS ARE GOING THERE:

- Visas for Russians are easy and cheap. Compared to a tourist visa for the UK, which costs over \$130 and must be applied for three months before travel, Russians can get a visa for Dubai, Abu Dhabi or the rest of the UAE for \$85, with a two to four day application time.
- New tour packages aimed at Russians. Operator TUI has opened up the Emirati market to Russia in 2016, with hotel packages in all seven Emirates. These are supported by daily scheduled flights from Moscow.
- Cultural tourism. Dubai draws in Russians with malls, beaches and clubs, but there are plenty of older attractions like the ancient city of Petra in Jordan. Security concerns in the region are keeping tourists away, but a healthy 20,000 Russians still came to Jordan in 2015.

NORTH AFRICA

A collection of new air flights, and hugely accommodating tourist networks, make North Africa ideally suited for Russian vacationers. Tunisia entered the top five tourist destinations for Russians in 2016, and expects to host half a million more Russians before 2016's end. Morocco too is keen to reinvigorate its offerings to Russia, by adding more highly attractive all-inclusive deals – a big incentive for Russian tourists.



KEY STATS

669%	Growth in Russian tourists to Tunisia, Jan-Jun 2016
500,000	Tunisian target for Russian tourists, Jun-Dec 2016
40,000	Russian tourists to Morocco, 2015

WHY RUSSIANS ARE GOING THERE:

- Tunisia lost most of its European tourists after a June 2015 beach shooting, so is betting big on Russia to replace them. As well as spending over a million euros on a Russia-focused marketing campaign, Tunisia is subsidising tour operators up to €4,000 per charter flight. This is paying handsome dividends – 650% more Russians came to Tunisia in the first five months of 2016 compared to the previous year.
- Morocco, meanwhile, is looking to reverse three years of declining Russian visitors with a huge campaign to attract more rouble in 2016. This involves a tour of 400 Russian tour operators, a \$2m ad campaign, and new routes from Moscow, St. Petersburg and Ekaterinburg.
- Morocco's hotels are also taking steps to attract Russians, who tend to prefer all-inclusive holidays in North Africa. 50% of top destination Agadir's hotels are currently all-inclusive, but Morocco's tourism authorities are looking to grow this to 80%.

FRANCE AND GERMANY

With the French government backing relaxed visa regulations for Russians, and a bilateral cultural tourism program being established, France is hoping to bolster Russian tourists numbers - particularly in the key destinations of Paris and the south of France. Germany, meanwhile, offers some of the world's most vibrant cities, as well as a huge Russian-speaking population to attract VFR tourism.



KEY STATS

408,000	Russian tourists to France, 2015
1.1 million	Russian tourists to Germany, 2015
EUR189	Daily Russian tourist spend in Paris

WHY RUSSIANS ARE GOING THERE:

- Visa relaxations. French ambassador to Russia Jean-Maurice Ripert told Russian media in 2016 that his country is looking to make things as easy as possible for Russian visitors, including a new 48-hour turnaround time.
- The draw of Paris. The City of Love holds a particular draw for Russians, with 580,000 overnight stays registered in 2015. What's more, they spend big – the average Russians spends \$189 per day in Paris, the second highest total of any country in the world behind Japan.
- VFR tourism to Germany. Like many destinations in this report, Germany's Russian population (230,000 as of 2015, plus many more with a Russian-speaking background) encourages family tourism. Alongside business travel, this was a major factor driving over 1.1 million Russian trips to Germany in 2015.

SCANDINAVIA AND THE BALTIC COUNTRIES

Whatever Russian travellers are looking for, chances are Scandinavia and the Baltic countries can offer it. The large Russian-speaking populations of Estonia, Latvia and Lithuania feed VFR travel (visiting friends and relatives), the capitals are ideal romantic and shopping getaways, and the forests, lakes and fjords of Scandinavia attract Russians by the millions. The proximity to Moscow and particularly St. Petersburg is also a strong driver of tourist flows.



KEY STATS

1.4 million	Russian tourists to Estonia, 2015
3 million	Russian tourists to Finland, 2015
151,000	Overnight Russian tourist stays in Helsinki, 2015

WHY RUSSIANS ARE GOING THERE:

- An easy destination. Russia's size means its people think nothing of driving distances that would have most other nationalities looking for a flight ticket. This also applies to holidays – a trip to Tallinn, Riga or Helsinki can easily come on the spur of the moment (although a visa is required) and is achievable in a few hours' travel. Finland's 2014 statistics show this nicely – 63% of all Russian visits in that year were day trips. Direct rail connections to Helsinki and all the Baltic capitals swell these numbers even more.
- Visiting friends and relatives. Over a million people in the Baltic countries are native speakers of Russian, many with relatives in the Russian Federation.
- Shopping tourism. 259,000 Russians came on cruises to Helsinki in 2015, and Helsinki's shopping options are a big reason why.

ITE Travel & Tourism

This report was produced by ITE Travel & Tourism, organisers of the MITT exhibition in Moscow.

Held annually in March, MITT is the leading and longest running event in Russia for the international travel industry. In 2017, the event will now take place over three days, as requested by our participants, with only business-to-business visitors in attendance. MITT is Russia's central meeting place for you to negotiate, network, sign new deals and showcase your destination as the new tourist hotspot.

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