



tourism market insights

Russia

WESGRO
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research

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1. Overview of Russia

About Russia

Where is Russia?	Russia is located in North Asia bordering the Arctic Ocean, extending from Europe (the portion west of the Urals) to the North Pacific Ocean.
Population (millions)	142,3 (2021)
Time Difference	South Africa is 1 hour behind Russia.
Language	Russian is the official language
General Overview	<p>Russia is one of the world's leading producers of oil and natural gas. It is also a top exporter of metals such as steel and primary aluminum.</p> <p>Real GDP grew by 1,3% in 2019.</p> <p>The country's current population is around 142,3 million and with moderate fertility of 1.6 births per female, the median age is currently at 40,3 years.</p> <p>In 2019, real GDP per capita was USD 27 044 and gross national savings was estimated at 26,7% of GDP.</p> <p>Unemployment was 4,6% in 2019.</p>

2. Overview of the Russian Travel Market

Russia Travel Market

Largest Cities
(number of people)

1. Moscow: 10,4 million
2. St. Petersburg: 5 million
3. Novosibirsk: 1,4 million
4. Yekaterinburg: 1,3 million
5. Nizhniy Novgorod: 1,3 million

Median Age

40.3 years

Paid Holidays (2020)
Public Holidays (2020)
Annual Leave (2020)

28.0
14.0
42.0

Outbound Departures ('000 trips)

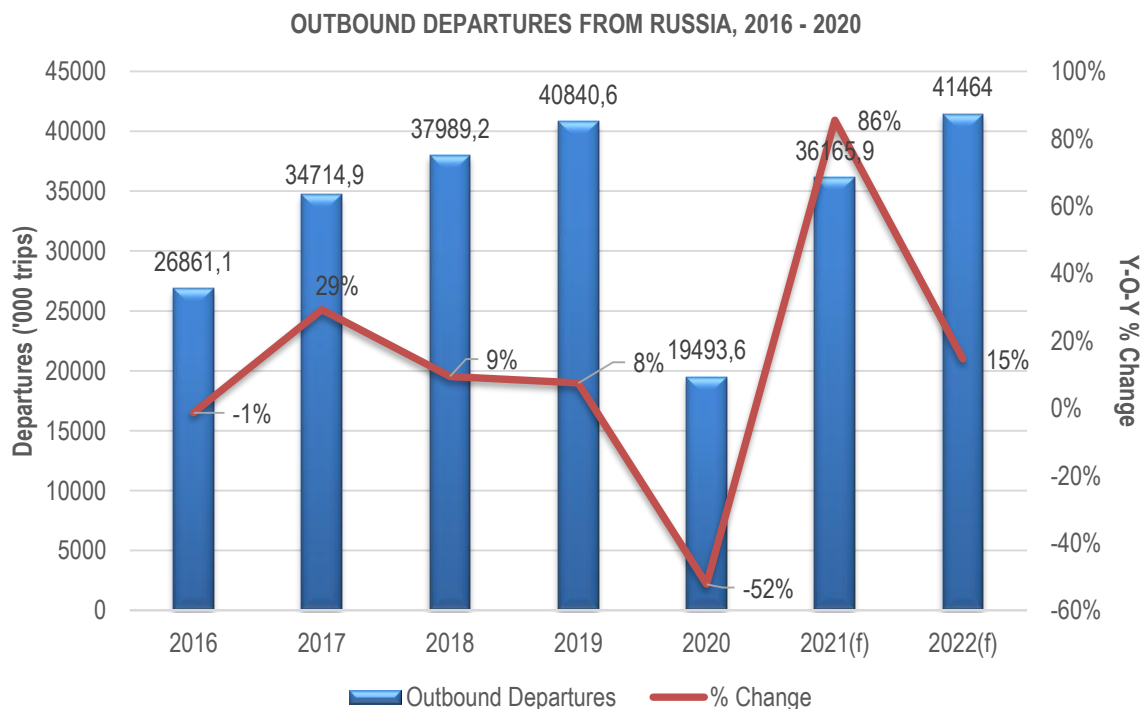
1. 2018: 37,989.2
2. 2019: 40,840.6
3. 2020: 19,493.6

Top 5 Outbound Destinations ('000 trips, 2020)

1. Turkey: 3,126.3
2. Belarus: 2,168.8
3. Egypt: 1,369.3
4. Thailand: 784.3
5. China: 708.8

Type of Outbound Trips

Leisure: 99,9%
Business: 0,1%



3. Russian Traveller Trends

3.1. Outbound travel trends

The COVID-19 pandemic has caused sharp declines in both inbound and outbound tourism flows as well as commercial activity across Russia.

Outbound departures reached 19 493 600 trips in 2020, declining by 52% from 2019. By 2022 the number of outbound trips is expected to recover to 2019 levels with a forecast expenditure of RUB 2,7 billion.

3.2. Needs of the Russia traveller

For residents in Russia spending time with family is a top priority. According to the 2020 Euromonitor Lifestyles Survey, nearly a quarter of respondents prioritise finding time to spend with their spouse/partner, 23% with their children and 12% with extended family. Many social gatherings shifted online as Russians tried to avoid physical interactions due to the spread of COVID-19.

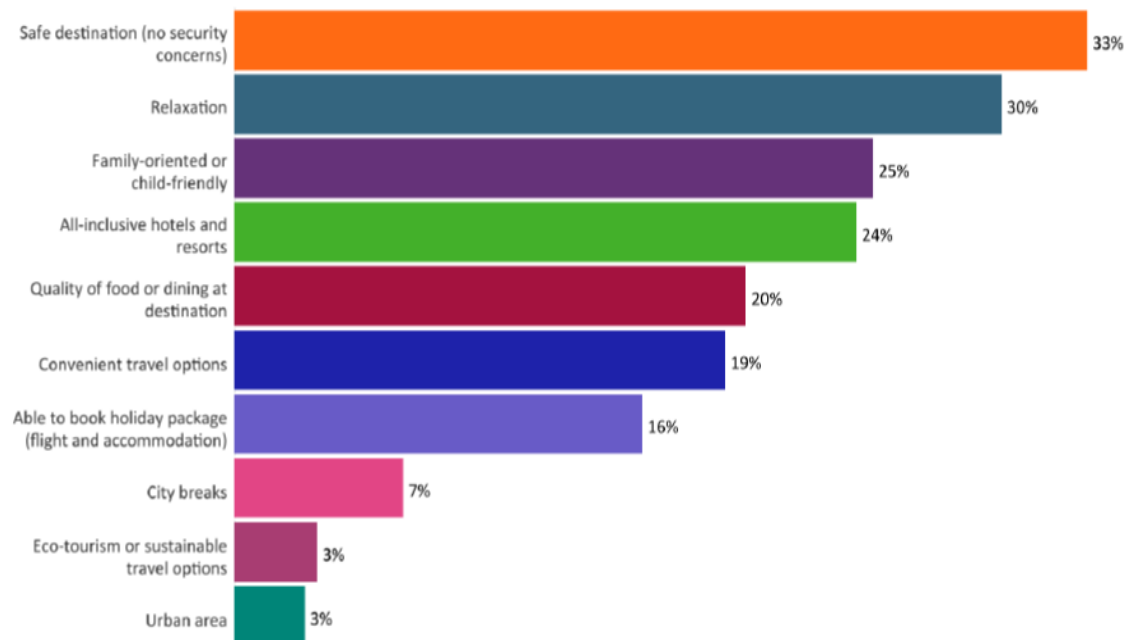
Although they are very comfortable with socialising via digital platforms, they also enjoy travelling abroad, 44% travel abroad at least once a year. A third of respondents cited nature and outdoor activities as their most important travel destination activity.

Safety in the destination (33%) ranked as their top travel destination feature followed by relaxation (30%) and family-orientated or child friendly experiences (25%).

Most important travel destination features

n= 1,017

% of respondents



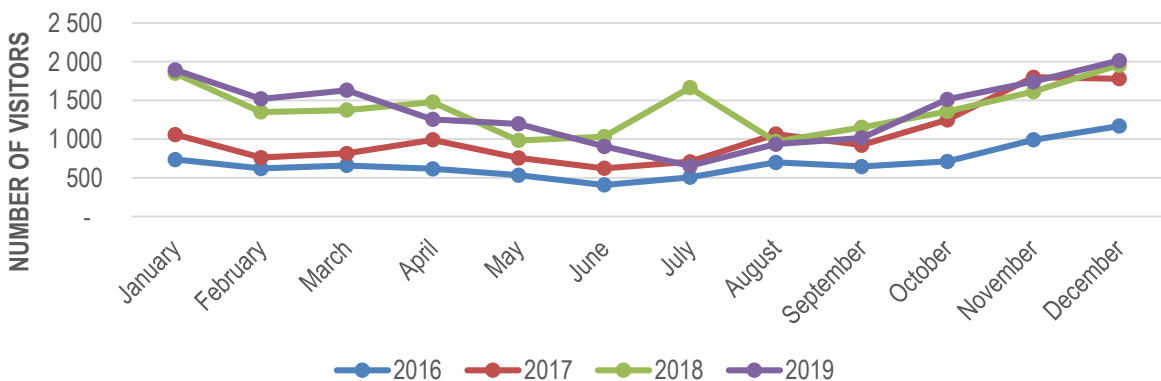
Source: Euromonitor International Lifestyles Survey 2020

4. The Russian traveller to South Africa

Russia Travel Market

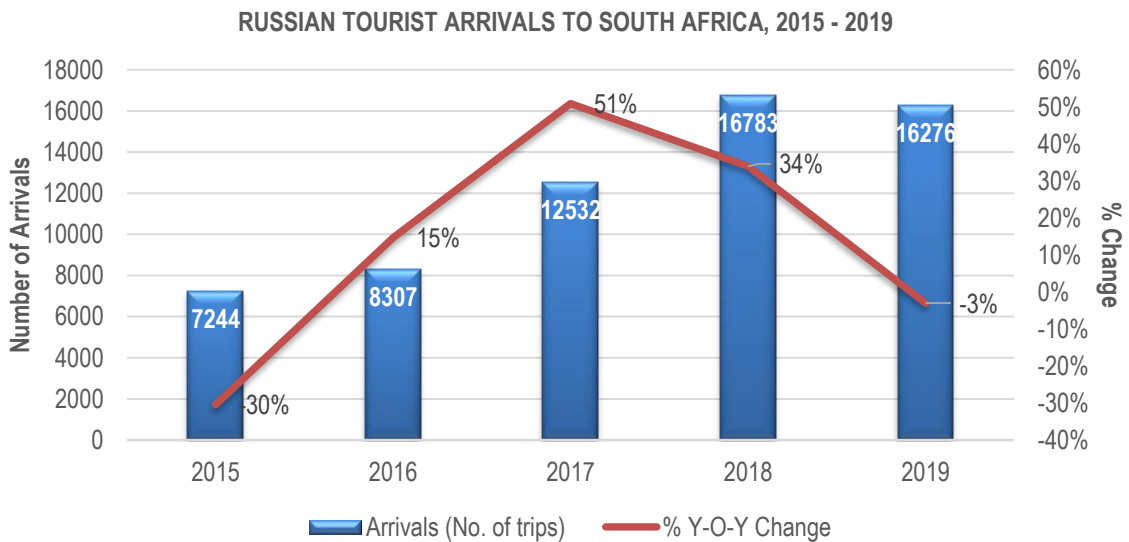
Number of Arrivals	2016: 8 307 2017: 12 532 2018: 16 783 2019: 16 276
Purpose of visit to South Africa (2019)	Holiday (39,6%) VFR (18,7%) Business (17,7%) MICE (17,2%)
Average length of stay in South Africa (Number of nights)	2017: 16,3 2018: 15,2 2019: 20,9
Age profile (2019)	25 – 34 yrs (44,3%) 35 – 44 yrs (21,1%) 45 – 54 yrs (12,9%)
Repeater Rate of Russia Travellers (2019)	1. First Time: 61,4% 2. 2 – 3 times: 19,8%
Accommodation Usage (2019)	1. Guesthouses 2. Hotels 3. Friends & Family
Total Foreign Direct Spend in South Africa (R in millions)	2017: R 251 2018: R 305 2019: R 307
Average Spend in South Africa	2017: R 23 200 2018: R 20 600 2019: R 20 500

SEASONALITY PATTERNS: RUSSIAN TRAVELLERS TO SOUTH AFRICA BY MONTH, JAN - DEC 2016 - 2019



4. The Russian traveller to South Africa

4.1. Visitor Arrivals to South Africa



4.2. Purpose of visit to South Africa

Travellers from Russia to South Africa are predominantly visiting for holiday purposes or to visit family and friends. A fair amount are also visiting for Business and Meetings, Incentives, Conferencing and Events (MICE).

In 2019, Russian travellers stayed in South Africa for an average length of 20,9 nights.

Top reasons for travel to SA

Holiday (39,6%)

VFR (18,7%)

Business (17,7%)

Average length of stay

20,9 nights

4.3. Activities in South Africa

Top activities undertaken

1. Shopping

2. Visiting natural attractions

3. Wildlife

4. Business

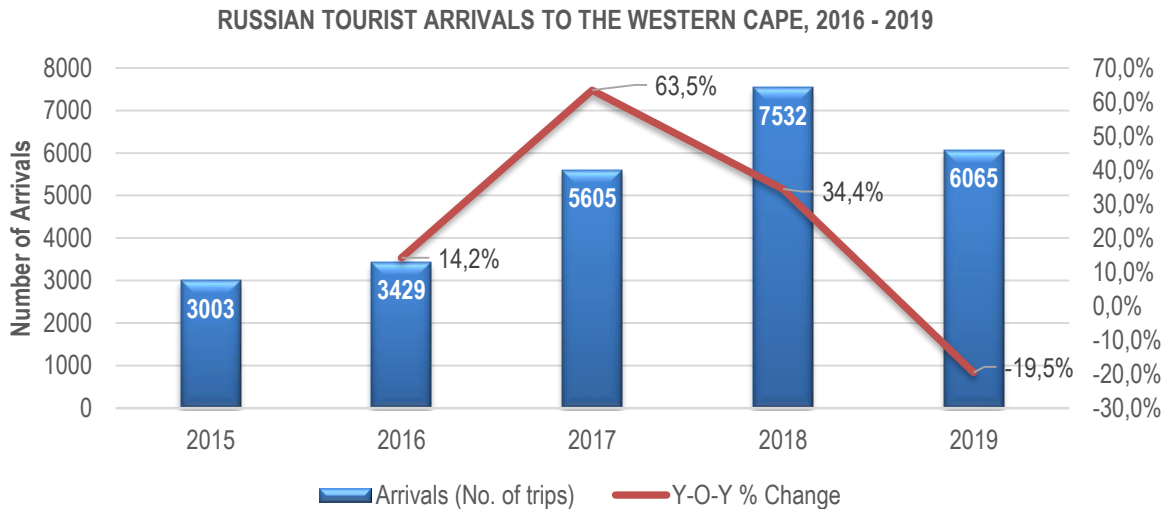
Shopping, visiting natural attractions, wildlife and business were among the top activities undertaken by Russian tourists while in South Africa.

They are more likely to make use of Guesthouse accommodation. Many travellers from Russia also make use of hotels and staying with family and friends.

5. The Russian traveller to the Western Cape

5.1. Visitor Arrivals to the Western Cape

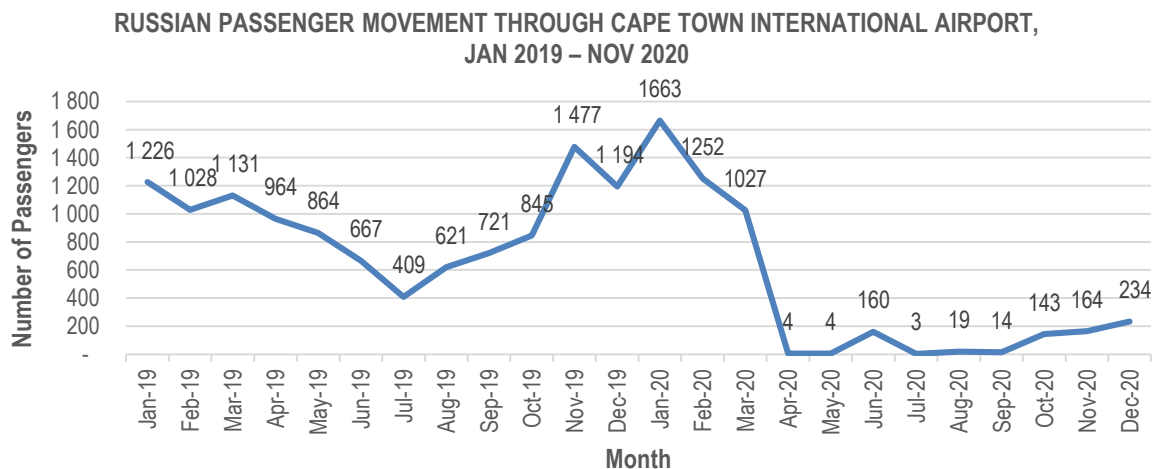
Russian visitor arrivals to the Western Cape reached its peak in 2018 increasing by 60,1% from 2015. Despite a decline of 19,5% which followed in 2019, tourist arrivals were still double the amount they were in 2015.



Source: South African Tourism, 2021

5.2. Passenger Traffic through Cape Town International Airport

Passengers through Cape Town International Airport from Russia grew by 35,6% in January and 21,8% in February 2020 when compared to the same months in 2019. Due to travel restrictions brought on by the COVID-19 pandemic, passenger arrivals decreased dramatically throughout the rest of 2020. However, Russia has shown promising growth in the first quarter of 2021, with a recovery rate of 46% when compared to the same period in 2019.



Source: OAG Traffic Analyser, 2021

6. Key Findings

- The COVID-19 pandemic has caused sharp declines in both inbound and outbound tourism flows as well as commercial activity across Russia.
- Outbound departures declined by 52% in 2020 from the previous year. By 2022 the number of outbound trips is expected to recover to 2019 levels.
- For Russian residents spending time with family is a top priority. Many social gatherings shifted online as Russians tried to avoid physical interactions due to the spread of COVID-19.
- When travelling, nature and outdoor activities are at the top of the list of holiday activities sought out by Russian travellers.
- Safety in the destination, relaxation, family-orientated or child friendly experiences, all-inclusive hotels & resorts, and the quality of food or dining are among their top travel destination features.
- Travellers from Russia to South Africa are predominantly visiting for holiday purposes or to visit family and friends. A fair amount also visited for Business and Meetings, Incentives, Conferencing and Events (MICE) in 2019.
- Russian travellers stayed in South Africa for an average length of 20,9 nights in 2019.
- Shopping, visiting natural attractions, wildlife and business were among the top activities undertaken by Russian tourists while in South Africa.
- They are more likely to make use of Guesthouse accommodation. Many travellers from Russia also make use of hotels and staying with family and friends.
- Russian passengers through Cape Town International Airport grew by 35,6% in January and 21,8% in February 2020 when compared to the same months in 2019. However, due to travel restrictions brought on by the COVID-19 pandemic, passenger arrivals decreased dramatically throughout the rest of 2020. Russia has since shown promising growth in the first quarter of 2021, with a recovery rate of 46% when compared to the same period in 2019.

7. List of sources

1. South African Tourism
2. Euromonitor International
3. OAG Airline Passenger Traffic Analyser
4. CIA World Factbook
5. [Russia Population 2021 \(Demographics, Maps, Graphs\)](https://www.worldpopulationreview.com/country-compare/russia-population-2021)
([worldpopulationreview.com](https://www.worldpopulationreview.com))

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