



Understanding Russian Outbound Tourism

What the Russian Blogosphere is saying about Europe



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Foreword

In recent years, the Russian Federation has become an increasingly important source market for many destinations worldwide. In 2013, nearly 32 million Russian tourists visited a destination in Europe, making the Russian Federation Europe's third largest generating market.

Although much travel in the Russian Federation is still booked offline, Russian consumers are progressively turning towards the Internet in their search for travel information. With more than 80 million Internet users in 2014 in the Russian Federation and with Russian citizens accounting for one in every three European social media users, an ever-greater number of National Tourism Organisations (NTOs) have established digital marketing programmes targeting the expanding online Russian market.

Understanding the digital trends of Russian travellers is a key competitive advantage to all destinations interested in this growing market. This innovative ETC/UNWTO study draws from the opinions of Russian bloggers and micro-bloggers and provides guidance to all destinations seeking to join the growing list of those tapping into the immense potential of the Russian market.

We trust that this report, which is part of our most valued joint UNWTO and ETC research programme, will contribute to a better understanding of the Russian Federation as a major source market for European tourism.

Taleb Rifai
Secretary-General,
World Tourism Organization (UNWTO)

Peter De Wilde
President,
European Travel Commission (ETC)

Executive summary

Travel planning and booking in the Russian Federation

- The Russian Federation is the world's 4th largest source of outbound tourists, but its prospective travellers tend to **consume information and book trips in a traditional way**. Brochures and magazines remain the major sources of travel information and only an estimated **25% of the population actively seeks** out information online, despite an Internet penetration rate of 60%. **Online bookings** account for only 18% of the total travel market in the Russian Federation and compared to other large source markets, Russian Internet searches for "online booking" are underrepresented while searches for "travel agency" are overrepresented;
- Nonetheless, more and more of Russian Federation's 84 million Internet users seek information and book their trips online, for themselves or their older acquaintances. The **online travel booking market is growing** by 40–50% per annum and there are reasons to believe that this growth will continue. There are a growing number of online travel agents, increasing popularity of mobile devices and social networks. Also, increasingly sophisticated Russian travellers, choosing to organize their trips independently, are driving adoption of online channels;
- Our research shows that Russian travellers receive **influence and inspiration** from several sources: **women** have a greater say in when couples and families plan their trips; **trendsetting tribes** inspire mainstream travellers; and phenomena introduced by **individual opinion leaders** are sometimes adjusted and adapted to a broad base of travellers. Savvy marketers know how to benefit from these patterns of influence, seen for example when the Burj al Arab luxury hotel in Dubai extended an invitation to photoblogging celebrity Murad Osman and was able to associate itself with his #Followmeto meme;
- The 2014 **Ukraine crisis** severely impacted Russian outbound travel through a **weakened rouble, official statements discouraging travel to Europe and fears of visa rejection and hostility at the destination**; and
- The Russian Federation being the world's largest country by area, **geography plays a large role** in the travel decisions of its inhabitants'. Internet searches for northern Europe are overrepresented in the western Russian Federation; for Asian and long-haul destinations in the east of the Russian Federation; for warm destinations in northern cities; and for independent and niche travel in Moscow and St. Petersburg.

General Russian travel interest

- Overall, Russian travellers show the greatest interest in **recreation** and **attractions** based on the volume of Internet searches, to which **family travel** and **shopping** should be added if based on social media buzz;

- Russian travellers **value comfort**, translating this into a desire for popular recreation resorts or big cities where attractions, nightlife, shopping and restaurants are easily accessible. Even travellers that follow the crowd when it comes to choice of destination and activities have a strong preference for **staying away from other travellers**, particularly Russians; and
- This study identifies four travel tribes, representing different approaches to travel, based on how they discuss and photograph their trips: the **Rookie** (who explores the possibility of travel), the **Guru** (who strives to maximize the travel experience), the **Immersive Explorer** (who seeks new adventures and immersive experiences) and the **Wealthy World Citizen** (who is looking for the best that money can buy). Their different travel styles and motivations can be taken as the point of departure for devising products and marketing messages that strike a chord with the right type of Russian traveller.

Europe-specific travel topics

- Russian travellers experience **substantial barriers to travel in Europe**. These include **visa barriers**, which have seen a long-term improvement but recent setbacks; **time barriers**, especially in the eastern part of the country; **language and cultural barriers**; **worries about safety and security**; and, recently, **fear of hostility**;
- The **European cities** that Russians display most online interest for are **nearby capitals** (Prague, Riga), **cultural hubs** (Paris, Vienna) and **seaside tourism spots** (Split, Catania);
- Rather than exploring a single country, Russian travellers prefer to do **city-hopping between major European city-destinations**. The most **central nodes** in the network of Russian traveller routes within Europe include Paris, Prague and Munich. Most Russian travellers enter Europe via Moscow or St. Petersburg;
- There are common patterns in Russian travellers' online **interest in European countries**. Destinations close to the Russian Federation – the Baltic countries, Poland and the Scandinavian countries – are characterized by a high number of Russian Internet searches for **transportation and camping**. Other destination types that emerge from the analysis of Russian Internet search interest are destinations that offer **relaxation and recreation** (mainly Mediterranean countries) and destinations that offer **city attractions**;
- Europe is associated with **good food and drink**; **weekend and culture trips**; **camping and nature**; as well as **winter sports**. Variation between countries is an advantage, offering Russian tourists a variety of shopping and dining experiences in different places; and
- The most commonly mentioned **positive sides** of travelling in Europe are: great sightseeing with many places to visit; a large selection of budget accommodation and food; great and varied shopping; and cleanliness. The most commonly mentioned **negative sides** include: the quality of accommodation, littered streets in some cities; high prices; and bad service at hotels and restaurants.

Chapter 1

Introduction

Fuelled by a rapid growth of the Russian middle class in recent years, the Russian Federation has grown to become the third largest source market for Europe. European destinations received nearly 33 million arrivals from the Russian Federation in 2013, with forecasts pointing to continued growth in a business-as-usual scenario. Given the significance of the Russian market for European tourism, a deeper understanding of these travellers, their behaviour and travel related trends is needed. Recent developments and souring relations between the Russian Federation and many European countries further warrant an assessment of changing attitudes and their impact on Russian outbound travel.

The purpose of the study has thus been to analyse the opinions of the Russian-speaking traveller as expressed through text and photos in the Russian-speaking social media sphere, as well as deduced from tourism related Internet searches in the Russian Federation. There has been a special focus on travel to and within Europe, with an aim of providing relevant perspectives and insights to support the forthcoming marketing activities of the European Travel Commission (ETC), the World Tourism Organization (UNWTO) and their member countries.

With one in every three European social media users being Russian,¹ and online markets growing rapidly in the country, studying the digital footprints that Russian-speaking travellers leave online reveal useful insights into their travel related habits, decisions, views, needs and frustrations. The methodological approach taken in this study, further described in *Annex II: methodological approach*, therefore combines mining of social media text and search engine data with an ethnographic perspective applied on individual blogs and photoblogs. This methodology could be called netnography.

As described further in *Annex II: methodological approach*, some of the sources used in this study specifically concern *Russian travellers*, while other sources are limited to *Russian-speaking travellers*. An effort has been made to filter out as much as possible of non-Russian content. Therefore, from here on we refer to Russian, rather than Russian-speaking, travellers.

The first chapter of this report provides a brief market overview and outlines Russian Internet and social media usage. The second chapter introduces the travel “tribes” that emerged from the netnographic analysis. The third chapter focuses on the planning phase and obstacles to outbound travel faced by Russian travellers. The fourth chapter describes general and Europe-specific themes among Russian travellers, as well as their list of pros and cons with regards to travel in Europe. The report concludes with a SWOT analysis and recommendations for the marketing and branding of European destinations, followed by an annex with country-specific information.

1 European Travel Commission (2014), *ETC Russia Country Report*, ETC, Brussels (online), available at: <http://etc-digital.org/wp-content/uploads/2014/02/ETC-Russia-Country-Report.pdf> (19-11-2014).

1.1 Key economic and socio-economic indicators

The Russian Federation is the sixth largest economy in the world based on purchasing power parity.² The nominal gross domestic product (GDP) is USD 2.1 trillion. The International Monetary Fund projects a 0.2% growth rate in 2014 and 1% through 2015.

The population size is 143.5 million, a decline from a peak of 148.7 million in 1992, according to World Bank figures. This decline was caused by a steep drop in birth rates combined with a slow increase in death rates following the collapse of the Soviet Union. World Bank data shows, however, that the Russian Federation is experiencing positive population growth since 2009.

Table 1.1 **Population, GDP and gross national income (GNI) per capita for the Russian Federation, 2005–2013**

Year	Population (million)	GDP (current USD billion)	GNI per capita (current USD)
2005	143.1	764	4,460
2006	142.5	990	5,820
2007	142.1	1,300	7,600
2008	142.0	1,661	9,640
2009	141.9	1,223	9,290
2010	142.4	1,525	10,010
2011	143.0	1,905	10,820
2012	143.2	2,017	12,740
2013	143.5	2,097	13,860

Source: Rosstat.

Most of the population is concentrated in large cities and as much as 74% is urban, a figure that has remained stable for the last twenty years. The largest cities are Moscow (11.8 million inhabitants) and St. Petersburg (5.0 million), followed by Novosibirsk (1.5 million) and Yekaterinburg (1.4 million). 15 cities in the Russian Federation have a population of more than one million.

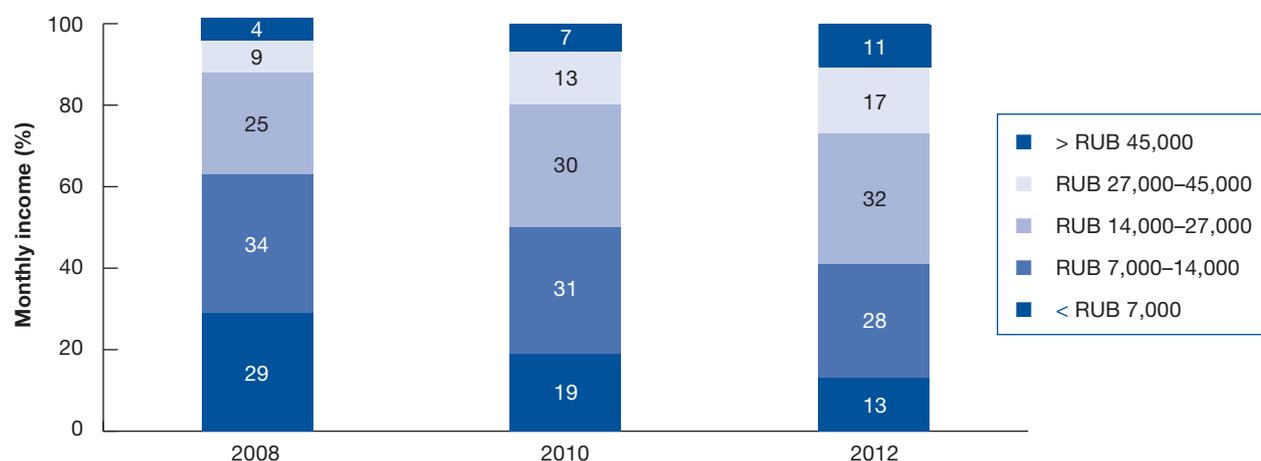
20.9% of the population is aged 0–19 years, 31.8% is aged 20–39 years, 28.7% is aged 40–59 and 18.6% is aged over 65 years. Women live on average more than ten years longer than men, leading to a male/female ratio below 0.5 for people older than 65 years.

According to the World Bank, the Gini coefficient remains stable around 0.42 for the Russian Federation. A Gini index of “0” represents perfect equality, while an index of “100” implies perfect inequality. 0.42 is not extreme in an international perspective. According to Credit Suisse, however, wealth in the Russian Federation is highly unevenly distributed – in its October 2013 *Global Wealth Report*, it is estimated that the 110 wealthiest individuals in the Russian Federation own 35% of all financial assets held by Russian households.

² World Bank, ‘GDP, PPP (current international \$)’, *International Comparison Program database* (online), available at: <http://data.worldbank.org/indicator/NY.GDP.MKTP.PP.CD/countries/> (19-11-2014).

The middle class has grown rapidly in recent years. Figure 1.1 shows the evolution of socioeconomic segments between 2008 and 2012. According to Rosstat,³ the average gross salary grew 160% between 2000 and 2012. It is now USD 850 per month.

Figure 1.1 Average monthly income distribution for total population, 2008, 2010 and 2012 (RUB, %)



Note: Due to rounding the numbers do not necessarily sum 100%.

Source: Rosstat.

1.2 Russian outbound travel

Russian outbound travel has seen high growth rates in the past years. Since 2000, international tourism expenditure by Russians has increased by an average of 15% a year, reaching an estimated USD 53.5 billion (EUR 33.3 billion) in 2013, up from only USD 8.8 billion (EUR 8.9 billion) in 2000. It is currently the fourth biggest spender on tourism expenditure, after China, the United States of America and Germany, and ahead of the United Kingdom and France. Its share of expenditure of all European travellers was 11% in 2013, up from 4% in 2000.

Table 1.2 Russian expenditure abroad, 2000, 2005 and 2010–2013

International tourism expenditure (USD million)						Change (%)		Average annual growth (%)
2000	2005	2010	2011	2012	2013 ¹	12/11	13/12 ¹	2005–2013 ¹
8,848	16,972	26,693	32,902	42,798	53,453	30.1	24.9	14.8

1) Data for 2013 are preliminary.

Source: World Tourism Organization (UNWTO).

This compares with an 8.7% average rise in outbound trip volume to 54.1 million trips over the same period, up from 18.4 million trips in 2000.

³ Rosstat (online), available at: www.gks.ru/bgd/regl/b13_13/lssWWW.exe/Stg/d1/06-05.htm (19-11-2014).

Table 1.3 Russian outbound trips abroad, 2000, 2005 and 2010–2013

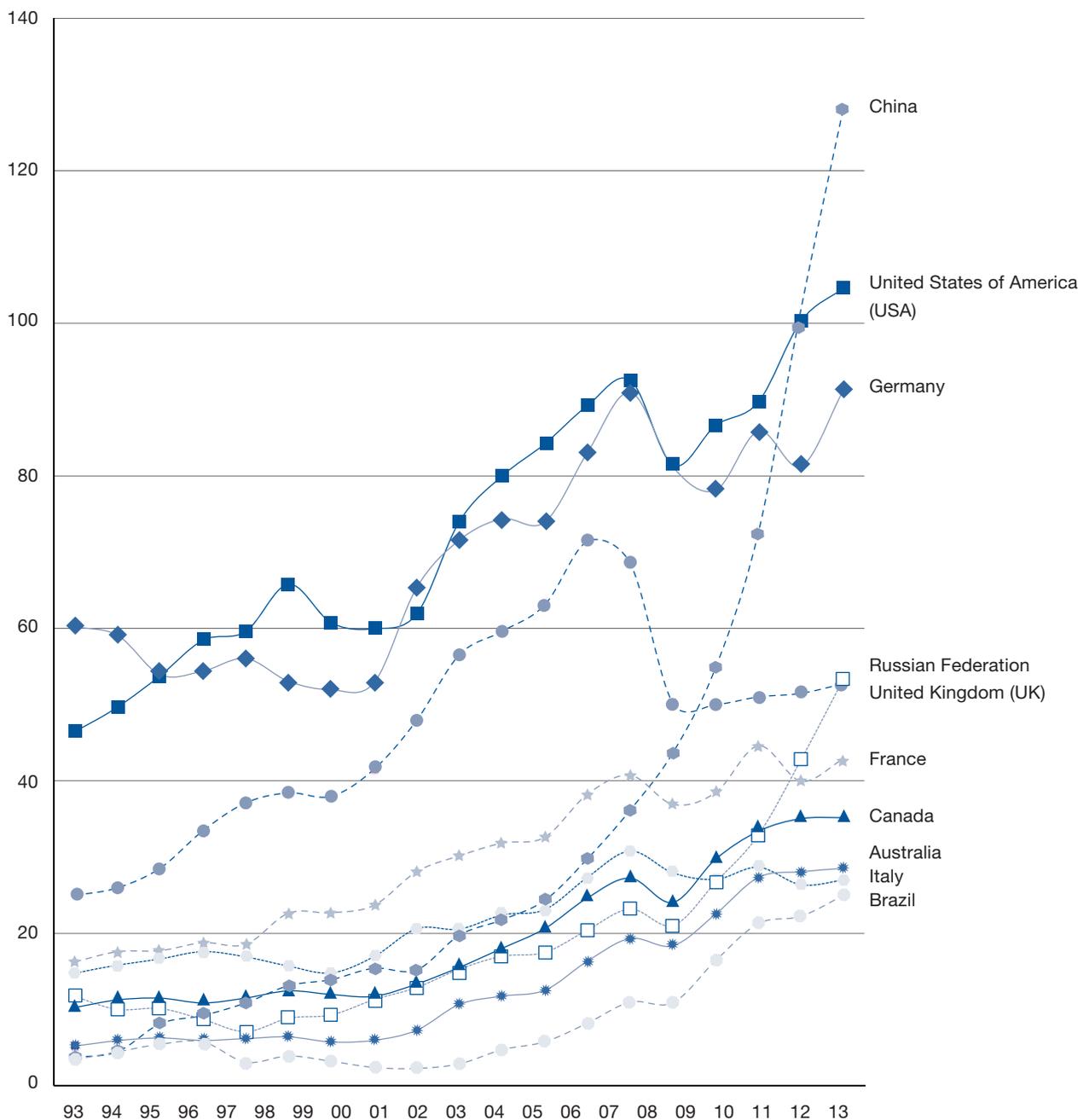
Trips abroad ¹ (× 1000)						Change (%)		Average annual growth (%)
2000	2005	2010	2011	2012	2013 ²	12/11	13/12 ²	2005–2013 ²
18,371	28,416	39,323	43,726	47,813	54,069	9.3	13.1	8.7

1) Includes same-day trips.

2) Data for 2013 are preliminary.

Sources: Goskomstat; World Tourism Organization (UNWTO).

Figure 1.2 World and regions: outbound tourism, international tourism expenditure, 1995–2013 (USD billion)



	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
China	3.69	4.47	8.13	9.21	10.86	13.11	13.91	15.40	15.19	19.74	21.76	24.32	29.79	36.16	43.70	54.88	72.59	101.98	128.58
USA	46.38	49.67	53.81	58.45	59.59	65.79	60.73	59.94	61.88	74.02	79.99	84.21	89.23	92.55	81.42	86.62	89.70	100.32	104.68
Germany	60.16	59.07	53.91	54.39	56.04	53.04	51.93	52.86	65.34	71.58	74.35	73.95	83.08	90.98	81.15	78.13	85.87	81.26	91.37
Russian Fed.	11.60	10.01	10.11	8.68	7.10	8.85	9.29	11.28	12.88	15.28	16.97	17.48	20.42	23.17	21.02	26.69	32.90	42.80	53.45
UK	24.92	25.96	28.56	33.46	37.10	38.41	37.97	41.51	47.93	56.53	59.60	63.09	71.42	68.49	50.14	50.00	51.00	51.47	52.75
France	16.25	17.57	17.72	18.76	18.55	22.63	22.68	23.66	28.07	30.16	31.83	32.60	38.23	40.71	36.91	38.47	44.58	39.96	42.91
Canada	10.26	11.25	11.48	10.85	11.50	12.44	12.00	11.72	13.34	15.52	18.02	20.62	24.64	27.23	24.04	29.73	33.39	35.04	35.17
Australia	5.17	5.91	6.26	5.94	6.18	6.40	5.73	5.95	7.27	10.67	11.75	12.52	16.35	19.31	18.37	22.51	27.32	28.07	28.51
Italy	14.83	15.81	16.63	17.58	16.89	15.69	14.80	16.92	20.59	20.54	22.39	23.10	27.34	30.77	27.92	27.07	28.65	26.35	26.97
Brazil	3.39	4.44	5.45	5.73	3.09	3.89	3.20	2.40	2.26	2.87	4.72	5.76	8.21	10.96	10.90	16.42	21.26	22.23	24.99

Source: World Tourism Organization (UNWTO).

1.3 Internet, information and social media in the Russian Federation

Using available statistics, this section outlines the profiles of the Russian Internet and social media users and describes how they consume information.

1.3.1 Internet in the Russian Federation

“What did people do in the evenings before the Internet?”

Russian blogger

As of July 2014, the Russian Federation had an estimated 84 million Internet users,⁴ making Russians the sixth largest Internet population in the world and the largest in Europe. Though its Internet penetration is still low by European standards – 59.3% of the population compared to Europe’s total Internet penetration of 68.8%⁵ – the Russian Federation’s growth rate is outpacing its European neighbours; it had 10% more Internet users in mid-2014 than one year earlier. It also has the highest Internet penetration among the BRIC countries. Nonetheless, 34% of the Russian population has never used the Internet.

Internet usage is highly uneven across age groups. 96% of Russian 18–24-year-olds and 93% of 25–39-year-olds use the Internet. These numbers are significantly lower for older cohorts, with 69% of 40–54-year-olds and 27% of Russians 55 years and older using the Internet. This implies that the digital divide in the Russian Federation is a matter of age, not geography, and also that the Internet penetration in older segments of the population will increase significantly over time. Still Internet usage is more common in larger cities and among people with higher education (80% Internet penetration), but other groups are gradually becoming more involved.

4 Internet Live Stats, www.internetlivestats.com.

5 Internet World Stats, www.internetworldstats.com.

In late 2013, the Russian Federation for Electronic Communication and Higher School of Economics estimated that, by the end of 2014, the overall turnover of Russian Internet-related markets will make up RUB 5.2 trillion (EUR 110 billion), or 8.5% of Russian GDP. They expect this number to grow 15–20% annually until 2018.

71% of the Internet audience are monthly online consumers, Internet users with high income and those living in large cities being the most active. The number of users on e-commerce sites is increasing, especially for international players such as Ebay, Amazon and Taobao. The online travel booking market is small from an international perspective, but growing (see section 3.1).

More recently, concerns have been raised about the potentially stifling effect of new regulations on the Russian Federation's Internet development. During an April 2014 media forum speech, the president of the Russian Federation, Vladimir Putin, labelled the Internet as "a CIA project"⁶. In May, five legislative acts pertaining to Internet-dependent businesses were passed in the Russian Duma. One of these was a federal law that tightened control over online money transactions. Another act obliges every foreign payment system to provide interim quarterly contributions of 25% of average daily turnover to the Central Bank of Russia – there are speculations that Visa and MasterCard, having voiced their concerns, may be exempted from the rule. Since 1 August 2014, another restrictive legislation has defined bloggers with a daily audience of 3,000 or more as mass media and thus subjects them to the same regulations as professional journalists. The last of the new laws, which will come into effect on 1 September 2016 if signed by the President, would forbid Russian citizens' personal data to be stored on foreign-based servers. This would hinder Russian citizens' use of Internet resources like Facebook and the App Store, as well as travel booking and other e-commerce activities.

The list of Runet's (the Russian-language Internet) top web pages is dominated by search engines (Yandex, Google, Rambler), social networks (VK, Facebook, Odnoklassniki, Mail.ru), social media (Livejournal, Twitter) and news media (Rbc).⁷ As much as 80% of daily Internet users use social networks, spending 30–40% of their total online time there.⁸ The most common activities online are watching movies, listening to music, blogging and using instant messaging services.

1.3.2 Russia's changing information consumer

Traditional channels still dominate the Russian media landscape, but while TV remains an important news source for virtually the entire population, social networks and digital media are growing in significance. Ranked by importance, TV is followed by friends and family (an important information source to 25% of the population), Internet (24%) and newspapers (19%). Recent years have seen a dramatic shift from newspapers to Internet; between 2009 and 2014, the share of the population regarding the former as an important information source dropped 18 percentage points, while the share of the population valuing the Internet grew 15 percentage points.

6 'Putin Says CIA Created the Internet, Cites Foreign Influence at Yandex' (2014), *The Moscow times* (online), available at: www.themoscowtimes.com/news/article/putin-says-cia-created-the-Internet-cites-foreign-influence-at-yandex/498903.html (24-04-2014).

7 Alexa, www.alexa.com.

8 Mail.Ru Group (2014), *Social Networks in Russia* (online), available at: <https://corp.mail.ru/media/files/issledovanie-auditorij-sotcialnykh-setej.pdf> (19-11-2014).

Levada Center divides Russians into four broad groups based on their information seeking behaviour: “Viewers”, “Old Guard”, “Word of Mouth” and “Most Informed”.⁹

- **Viewers** (55% of respondents) passively consume information. TV is their main and frequently sole, source of information. Older people and residents of smaller cities and towns are overrepresented in this group;
- The **Old Guard** (20% of respondents) get their information from traditional media’s television, radio and newspapers. They have an interest in current events and are on average more educated than Viewers, but they lack the knowledge about how to use online information resources;
- The **Word of Mouth** group (18% of respondents) seeks information through social networks – particularly online – and various other online resources. A majority of this group is young and well-educated. The information it absorbs is mostly related to consumption and entertainment; and
- The **Most Informed** (7% of respondents) have a broader interest in current trends and events, which sets them apart from the Word of Mouth group. They access many sources of information and tend to be better educated and wealthier than the other groups. About half of this group lives in Moscow and other major city centres.

In these terms, the Word of Mouth and the Most Informed groups dominate the social media territory. They are influencers in social media but their decisions are also most influenced by social media. Nonetheless, the trend that applies to social media applies to Russian Internet use as a whole: with near total Internet penetration in lower age groups, the digital divide is primarily a matter of age rather than geography or even socioeconomics (though variation across the latter remains sizeable). Even if they are Viewers or Old Guard, parents now get information and influence from their children, who are more active Internet users.

1.3.3 Social media in the Russian Federation

Statistics show that 45% of Russians use social media on a regular basis. As is the case for the Internet in general, the use of social media is more common among people with higher education living in larger cities and is not equally adopted throughout the age curve. 93% of 18–24-year-olds are active in social media, but for older segments the share drops: 83% in the 25–39-age segment, 50% in the 40–54-age segment and 17% in the 55-and-up-age segment. Thus, the most striking discrepancy in Internet use is based on age rather than other factors. On the other hand, the reading of blogs in this study has made it apparent that many non-users of social media benefit from its information “second hand” through younger generations. For example, young travellers may help their parents to find travel information online.

The social media landscape is dominated by a mix of Russian and non-Russian platforms. VK, Facebook and Odnoklassniki are the most popular social networks. The first two have their greatest followings in the capital and among office workers, whereas the latter has a broad user base across the country and is relatively more common among non-office workers. Micro- and photoblogging sites, dominated by Twitter and Instagram respectively, are also most popular in big cities. Photoblogging in general and Instagram in particular, have experienced rapid growth in the Russian Federation over recent years.

⁹ Levada Center (2014), *Russian media landscape: TV, press, Internet*, in Russian (online), available at: www.levada.ru/17-06-2014/rossiiskii-media-landshaft-televidenie-prensa-internet (19-11-2014).

Women form a small majority in all social media platforms, making up between 53% (Twitter) and 56% (Odnoklassniki) of users in major networks.¹⁰

20% of posts in social media are about the posters' activities, whereabouts and personal views; these have been of great use in this study. 40% are repostings of popular news, comments and discussions. The rest of the posts concern a wide range of topics, including travel. In blogs, descriptions of actual trips are far more common than descriptions of travel plans, which rather show through questions in forums.

An increasing share of the social media population has turned to photoblogging, sharing photos of their day without more than a few words of comment or description. The photo sharing site Instagram is growing rapidly and looks set to take a leading position in its segment in the Russian Federation.

10 Mail.Ru Group (2014), *Social Networks In Russia*, in Russian (online), available at: <https://corp.mail.ru/media/files/issledovanie-auditorij-sotcialnykh-setej.pdf> (19-11-2014).

Chapter 2

Russian “travel tribes”

Based on three months of qualitative fieldwork – reading blogs and travel forums and studying photoblogs using a netnographic approach – four “travel tribes”, each representing a unique approach to travel, were identified. The four tribes are described in-depth in this chapter.

2.1 Unlocking the hidden values of the tourist

It has long been known that studying consumers from a “tribal” perspective is especially rewarding when it comes to understanding the latent values, symbols, desires and behaviours of a population – complex qualities that are sometimes not so discernable when analysing quantitative statistics alone.

The starting point is therefore to acknowledge and accept that consumers (in this case, travellers) shape collective feeling, togetherness, social rituals, norms and shared values and symbols through the social arena in which they choose to participate (in this case, how and where they travel).

This chapter introduces and presents the four major tribal groups of tourist that have emerged in our three-month-long netnographic study. By applying ethnographic methods to an Internet-based reality, we have read, observed and studied how different travellers discuss topics and represent themselves online: this methodology is known as “netnography” and is a powerful tool in the exploration, understanding and interpretation of contemporary lifestyles (or “tribes”).

The four tribes we have discovered are the “Rookie” (estimated to be 50–60% of Russian travellers), the “Travel Guru” (25–35%), the “Immersive Explorer” (10–20%) and the “Wealthy World Citizen” (5%).

2.2 The Rookie: becoming a tourist

Travelling is a relatively new behaviour for the Russian citizen, visiting other countries and cultures having been an uncommon practice in the days of Soviet rule. In recent years, however, Russians have gained increasing access to travel, producing opportunities to go abroad and experience new influences through foreign cultures and lifestyles.

What characterizes the “Rookie”: a patriotic Russian who longs for the experience of travel. The tribe is overrepresented in older age cohorts, in smaller cities and towns and among the “Viewer” and “Old Guard” information consumer types. Lacking economical capital and prior experience of leaving Russian borders, the tribe is unsure and often seeks the guidance of more traditional

channels (typically TV, travel brochures and offline travel agencies) before, during and after their trips. Eager to travel abroad, the Rookie will save money and join a tour group or charter trip – activities that signify a middle-class lifestyle.



This Rookie is visiting a typical tourist attraction in Egypt together with a group of Russian tourists.

Courtesy of Aleksey Morozov.

The first aspect of the Rookie's travel behaviour is an uncertainty of where and how to travel. Online travel discussions indicate a very limited “know-how” in this particular group of travellers. They tend to visit the local tourist agency, book a trip recommended by a travel agent and go with a group and a Russian-speaking guide (e.g., a bus tour through Poland, the Czech Republic and then Germany). These experiences tend to be more controlled. A guide points out what to see, where to go and when to eat. The tourism of this particular tribe is characterized by a more distanced experience, decontextualized from the destination. Due to a lack of cultural or linguistic understanding, the Rookie is “introduced” to the foreign setting through the lens of a Russian guide.

In the search of convenience and safety, for example when travelling with children (see section 4.3.3), also more experienced travellers can travel like Rookies. These travellers are naturally more independent and interest oriented, yet less focused on identity and authenticity than the “Guru”, described in section 2.3.

Considering the tribe's large size, approximately 50–60% of Russian travellers, the Rookie proves surprisingly difficult to locate online. As Internet penetration in the Russian Federation is still below 60% and the Rookie is overrepresented among non-users, the share of social media posts written by this tribe is much smaller than might be expected. Though difficult to spot in blogs, discussions in online forums make it evident that the group is present online. Frequently discussing where to go, they appear keen to learn from the experiences of others, but rarely add to the discourse themselves. This tangible uncertainty is an important force to consider when understanding their preferences and choice in travel.

The two following quotations are typical of the Rookie. They are unsure and keen to be put at ease:

“I know little English and I'm afraid of getting lost in a foreign country.”

Rookie in forum

“Leaving the plane, I'll feel like a blind kitten, not knowing where to go.”

Rookie in forum

Travelling for the Rookie could be seen as an attempt to contribute to a more globalized Russian Federation. The desire to travel is prevalent in the country and now much more accessible to the less-wealthy classes. The Rookie is a representation of the Russian who wants to participate in a rapidly modernizing, globalizing Russian Federation, but lacks the money or knowledge to fully take part. The Rookie wants to see the world and experience other cultures in a fashion that is safer, more familiar and less challenging. Travel for him/her is therefore shaped by pragmatics; experiences occur at a distance from the "foreign" cultures witnessed and do not challenge identity or tradition.

Identification with this tribe is not permanent, however. There are many examples of Rookies transitioning to the more experienced Guru as they start to feel more confident in their abilities to travel independently. This transition is highlighted by the following blog quote written by a Rookie:

"As we were travelling to Europe for the first time, we used the services of a Moscow travel agency through a small agency in Vladivostok. Next time we'll go by ourselves, without the travel agency."



Having a good life in the Russian Federation entails traveling.

Courtesy of Ellina Malusheva.

2.3 The Guru: a self-proclaimed travel expert

If the Rookie is an uncertain, careful traveller who prefers structured trips with Russian-speaking guides, the Guru is the traveller who picks the destination him-/herself, choosing where and when to go, ensuring that a trip abroad is a full-blown experience of rewarding destinations. Meanwhile, the distinction between the Guru's travels and shallow tourism is marked through determined interaction with "the locals" (albeit in a more or less structured manner).

The Guru's travelling ethic opposes the methods of the Rookie. During fieldwork, we soon came to recognize a strong feeling towards the idea that travel required skill. In the eyes of the Guru, travelling like a Rookie was not an "authentic" style of travel. Truly experiencing another culture was vital:

"One of the most common reasons why every year we go abroad is the desire to experience a new culture, different from ours. It is this which in old days moved many explorers."

Guru traveller in blog

The Guru connects travel to historical ideas of exploration, experience and new encounters with different cultures, but in reality this is a type of travel that the Guru would probably never put into practice. Instead, typical Guru posts belie an ongoing belief in experiencing the world in an ordered fashion. With an emphasis on itinerary and planning, the Guru's style of travel is far removed from the intrepid explorers they might admire.

So who inspires the Guru? Despite its harsh criticisms, the concept of "trickle down" (the idea that trends are created and nurtured in more elite levels of society and then "trickle down" into other socio-economical strata) can be applied in this context. The Guru does in many ways gaze at the "Immersive Explorer" and "Wealthy World Citizen" for inspiration and ideas and he/she has the ability to follow trends legitimized by these tribes. Therefore, his/her travelling habits are in many respects not constructed autonomously, but instead through following in the footsteps of other tribes, thereby making trends that were perhaps originally "niche" or inaccessible become more mainstream.

The Guru is a traveller who is critical, conscious and careful. He or she makes sure that the trip will live up to their expectations, rather than relying on travel agencies, towards whom they take a negative stance. The Guru has recognized his/her newfound ability to control and shape his or her travel and acknowledged that the practice takes expertise and experience. We note that this emerging behaviour is comparable to that of consumers in general: they recognize that it's necessary to have "smarts" in the marketplace and thus develop strategies. The Guru is the same. They frequent different travel sites and eagerly post ratings or discuss different destinations. They make an effort to share experiences and portray travelling as a skill. This emerges as the single most important aspect of the tribe.



The Guru will visit new exciting destinations and make sure that the experience is unique and worth telling about back home.

Courtesy of Katya Afanasyeva.

In short, the Guru is a traveller who embarks on identity-forming experiences. He/she intuitively understands that travel works to build and convey identity and sharing one's experience thus becomes an important means of expressing one's identity. Going to Thailand to get away from the winter and exploring the Andes on a hike are two very different yet similar trips. For the Guru, it's not so much where one goes, but why and how one goes. An eagerness to learn about cultures in an independent fashion is a common trait, yet equally vital is telling people back home about having done so.

2.4 The Immersive Explorer: a daring traveller

This tribe turns travelling into a full time job! For the Immersive Explorer, travelling means leaving things behind and to worry more about escaping the familiar and seeking new experiences than how the trips will be perceived as social status symbols once back in the Russian Federation (if they ever go back!).

The Immersive Explorer is the one who pushes the boundaries, trying new modes of travel and connecting with locals and natives around the world. They might take a language course during their trip, work as a volunteer, or take belly dancing courses and cooking classes. This Russian traveller eschews all-inclusive resorts, weeks spent by the pool, wealthy beach clubs and cocktails at St. Tropez hot spots. Instead, he/she might stay in hostels, travel to countries that other Russians would never dream of visiting, or couch-surf his/her way across India.

Immersive Explorers are free thinkers, ones that defy the customs of their countrymen, established hotels and mainstream destinations offering them no joy, no authenticity and no challenge. They convey their identity by sharing where they went, who they befriended and what new perspectives were gained.



Remoteness is key in the travels of the Immersive Explorer. Experiencing the life back stage in different destinations makes traveling into a real “eye-opener”.

Courtesy of Alexandra Balakina.

With the goal of getting off the beaten track, Immersive Explorers constitute a small but influential group. They like to participate in local culture, joining festivals and events, sampling local cuisine, observing street life and enjoying the pulse of the places they visit. Monuments and traditional attractions do not interest them. Due to participation in online social networks – namely Twitter, Instagram, Livejournal and VKontakte – the Immersive Explorers’ social media savvy draws increased attention to under-visited places and they influence trends that mainstream travellers follow.

2.5 The Wealthy World Citizen: the world as an oyster

The smallest of the four tribes is the Wealthy World Citizen. These travellers are the ones who can splurge. They have the money, time and resources, as well as an interest in making their privilege known.

In contrast with the Immersive Explorer, the Wealthy World Citizen doesn't choose to experience the backstage or back alley of their destination, but instead prefers a tailored visit that reflects the local culture in a more "polished" way.

The Wealthy World Citizen visits high-end resorts and rubs shoulders with celebrities. They eat, drink and play well. This travelling Russian is influenced little by fellow Russians, but rather by other world citizens and their travel experiences. Whichever location is currently "hot" in the right circles will surely be a place worth visiting.

This tribe is expert at assembling status symbols and flaunting them on social media. Cautious about what he/she chooses to publish, the pictures are often calculated to show off a world that for many could never become reality. The Wealthy World Citizen may not be concerned with the travels of other Russians and is instead epitomized by luxury travel; his/her preferences can be observed and understood as the potential future desires of the travel Guru and later, the Rookie.

In the following sample quotation found online we get a feel of the Wealthy World Citizen's perspective around a typical destination – a three star restaurant in Paris, France:

"Of all the Michelin three star restaurants in Paris, L'Ambroisie is the only one where its chef is always in the kitchen. ... What I found truly hilarious was that the menu given to me was without prices, while my bf was handed a menu w/all the prices. :) ... Downsides: probably the most calories per minute since we arrived in France and, of course, the price. 4 course dinner, dessert, bottle of Champagne for 2ppl, 1200 Euro, plus tips of course."

Wealthy World Citizen in blog

The quotation is interesting for several reasons: our traveller notes the authenticity of the restaurant signified by the chef's presence in the kitchen; she is not offended that her "bf" (boyfriend) receives a menu with prices, portraying traditional gender roles as positive; and she concludes that the food was probably packed with calories, a clear downside. This short online post is filled with values and norms: traditional gender roles, awareness of and emphasis on authenticity at one of the world's finest restaurants and a willingness to pay a hearty sum for the experience plus tips "of course". This account demonstrates an important social ritual and is also posted online for others to view from a distance.



Moving around in style is essential! Cars, boats and planes act as important status artefacts and are of course incorporated in the showing of the travels. The view from the helicopter is equally as important as the destination itself.

Courtesy of Svetlana Karpekina.

The Wealthy World Citizen moves stylishly, with helicopters, private jets, luxury cars and yachts being typical modes of transport. Such transport becomes part of the experience itself, while for the Rookie or Guru the transport is simply a means of getting from A to B. In this way, it becomes clear why the Wealthy World Citizen seems to prefer photoblogs to text blogs: their travelling is packed with status symbols of wealth and these embody what it means to travel in style and luxury. Pictures from private jets or the view from a helicopter become symbols that are enthusiastically disseminated to others on social media.

2.6 Contrasts help identify tribes

When working with tribal categorization, it is important to illuminate the contrasts between different groups. In table 2.1 we have listed some important features that are typical for different tribes. Please note that this is not an exact representation and that the features are more complex in practice. However, looking at the material and understanding the Russian traveller through a “tribal lens” like this can assist immensely when trying to understand how different groups travel, plan their trips and appreciate going abroad. Table 2.2 shows travel products that would attract the tribes, whereas table 2.3 shows marketing messages that would strike a chord with the tribes.

Table 2.1 Tribe's approach for different travel related features

Features	The Rookie	The Guru	The Immersive Explorer	The Wealthy World Citizen
Status	Simply going abroad	Maximizing the travel experience	Exploring and having profound experiences	Visiting and experiencing the best money can buy
Artefacts of Travel	Guide book and together with other countrymen	Travel plans made by themselves, inspired by others online	Simple luggage, word dictionary and curiosity	High-end accommodation, the best food and exclusive experiences
Travel Rituals	Experiencing other cultures through a familiar lens	Visiting tourist attractions, on their own terms	Going into the unfamiliar areas and growing as a person	Visiting the most exclusive destinations and demonstrating wealth
Online behaviour	Limited: showing traditional tourist attractions	Frequent: showing personalized take on traveling	Spontaneous: when worth showing something authentic	Exclusive: showing only the polished and luxurious aspects of their travel
Estimated size	50–60% of travellers	25–35% of travellers	10–20% of travellers	~5% of travellers; small but large wallet

Table 2.2 Tribe specific travel products

The Rookie	Concept travelling with guides and ready-made package deals. Travel products that appeal to the Rookie are packed with great experiences, “must-sees”, all at a good price and convenient to book. Pleasant reviews from other travellers will make it all seem safe!
The Guru	Flexibility is key when designing travel products for the Guru. Businesses targeting the needs of Gurus must offer them the possibility of shaping their own route and picking their own destinations, while still partnering with well-known brands to ensure an experience that seems safe and accessible.
The Immersive Explorer	For the Immersive Explorer, there's a desire for cheap and easily accessible plane tickets to destinations that are just on the rise. The travel product needs an aura of uniqueness, of being “off the beaten track” – it must offer the potential to challenge the traveller in a fun and different way.
The Wealthy World Citizen	Travel products for the Wealthy World Citizen should be characterized by luxury, high fashion and haute cuisine. The travel product must appear uniquely tailored for the particular traveller. New transport technologies play an important role in travel products for this group.

Table 2.3 Tribe specific marketing messages

The Rookie	“Great experiences, well-known places and excellent Russian guides!”
The Guru	“Travelling at your own pace, to the places you want to see, with the locals you want to meet – all with comfortable hotels and resorts!”
The Immersive Explorer	“Experience as much as possible of what the destination has to offer. Hang out with the locals and try the local cuisine!”
The Wealthy World Citizen	“Savour the best the world has to offer. Travel from start to finish in a seamless experience of style and luxury to the most unique resorts in the world.”

Chapter 3

The planning phase

This chapter highlights current trends in the Russian travel booking market and describes important topics during Russian travellers' planning process. The primary insights emerged from a quantitative analysis of Russian travel forums as well as in-depth reading of posts.

3.1 Planning approach and online travel booking

The online travel booking market is small, accounting for only 18% (or USD 8.3 billion) of the total travel market in the Russian Federation.¹ This is significantly lower than the one third it occupies globally and the 60% share it has in the United States. Nonetheless, the segment is growing at an estimated rate of 40–50% per annum, rapidly increasing its share of the total travel market. The Russian Federation's online travel booking market is primarily made up of the categories of air tickets (USD 4.7 billion), hotel bookings (USD 2.4 billion), railway tickets (USD 0.9 billion) and tour packages (USD 0.3 billion).

While most Russian travellers book trips through offline travel agencies, many of them rely on the Internet to find travel related information and reviews and to compare prices of flights and accommodation. However, as noted in ETC's 2014 Russia Country Report about digital trends, travel planning in the country, like travel booking, remains rather traditional. It relies heavily on word-of-mouth, personal recommendations and reviews. Printed materials, such as brochures and magazines, remain the major sources of travel information.² Russian travellers' preference for traditional travel booking channels is further highlighted in section 4.1 of this report.

Discussing the prospects for increasing online travel bookings, ETC's country report makes the case for supply-side drivers: the growing number of online travel agents, in combination with the increasing popularity of mobile devices and social networks, is directly and indirectly driving Internet sales and information seeking.³

There is also a demand-side argument to be made, that the increasing sophistication of Russian travellers will drive adoption of online channels. As discussed in section 3.4, the barriers to and uncertainties of, travel to Europe are considerable for Russian travellers. Booking through travel agencies is a way of letting someone else deal with these issues. As travellers get more experienced, however, they tend to prefer independent travel. As this tendency grows, so will online travel planning and booking.

1 Oktogo (10 January 2014), (online), available at: <http://oborot.ru/news/13767/23> (19-11-2014).

2 European Travel Commission (2014), *ETC Russia Country Report*, ETC, Brussels.

3 Ibid.

3.2 The online travel information landscape

The most visited travel related web pages on Runet are hotel and travel booking sites. Booking.com is the dominant player and the 82nd most visited homepage in the Russian Federation, but smaller sites like Tophotels.ru (177), Ozon.travel (765) and Travel.ru (1,078) are making inroads. The fact that Otzyv.ru, an online travel forum, is the 596th most visited website in the Russian Federation demonstrates the importance of travel discussions in the country. Leading travel information websites include Tonkosti.ru (680) and Turizm.ru (1,015). The web pages of traditional tourism agencies are also high on the list, with Coral.ru (663) and Natalie-tours.ru (855) taking the category's top spots.

Table 3.1 Top travel websites

Site	Rank in the Russian Federation	Type
Booking.com	82	Online travel booking
Tophotels.ru	177	Online travel booking
Tripadvisor.ru	270	Online travel reviews and comparisons
Otzyv.ru	596	Travel forum
Coral.ru	663	Offline tourist agency
Tonkosti.ru	680	Travel information
Ozon.travel	765	Online travel booking
Natalie-tours.ru	855	Offline tourist agency
Turizm.ru	1,015	Travel information
Travel.ru	1,078	Online travel booking
Tourdom.ru	1,443	Travel information
Votpusk.ru	1,635	Travel information
Anywayanyday.com	1,795	Online travel booking
Turpoisk.ru	2,281	Travel information
1001tur.ru	2,325	Offline tourist agency
Marshruty.ru	2,458	Travel forum
Ayda.ru	2,664	Travel forum
Komandirovka.ru	2,793	Online travel booking for business trips
Bpclub.ru	2,994	Travel information

3.3 Influence

Four key influencer factors or types that impact the travel discussions and decisions of consumers have been identified in this study:

1. **Individual opinion leaders:** top bloggers and photobloggers can be hugely influential, with followers or readers numbering in the hundreds of thousands. Such influential individuals include:
 - Artur Shigapov (nicknamed Popados), a professional traveller, blogger and author of numerous guides on Europe and South-East Asia;
 - Anton Krotov, author of 36 books about travel and founder of the *Academy of Free Travel* for hikers and hitchhikers;
 - Sergey Dolya, a photographer of extremely vivid photos from trips to 70 countries; and
 - Maria Dubrovskaja, a photographer and designer who lived and travelled in a number of Asian countries for the last seven years and blogs about life in constant travel.
2. **Gender:** women are not only more active in online discussions, but also have a greater role in planning the trips. This involves selecting the destination, booking flights and hotels and organizing activities;
3. **Tribes:** trends tend to spread from the Wealthy World Citizens and the Immersive Explorers to the Gurus, who adjust them to their own budgets and lifestyles. For example, while the Wealthy World Citizens like to spend time in the French Riviera, the Gurus instead opt for the Italian and Greek coasts, which are cheaper but still provide a taste of the luxury lifestyle. Both the Wealthy World Citizens and the Immersive Explorers follow international trends, but they take their inspiration from very different quarters and barely influence each other at all. The Wealthy World Citizens, like the Rookies, display more of a herd mentality, whereas the Immersive Explorers have made it a sport to uncover unspoilt destinations. After absorbing trends from the Wealthy World Citizens and the Immersive Explorers, the Gurus in turn influence the Rookies and the travel agencies that create their tours; and
4. **Policy makers:** with the Crimea crisis, influence has shifted away from online opinion leaders towards government policy makers. Stricter rules for online expression have restrained blogging, while a statement by President Vladimir Putin suggesting that Russians should not travel abroad has influenced some groups.

3.4 Barriers to travelling to Europe

Barriers to travel to Europe were identified by analyzing the discussion in blogs and travel forums quantitatively and qualitatively. The main barriers are described below.

3.4.3 Language and cultural barriers

Russians have a relatively low level of English language proficiency. Naturally this leads to difficulties when it comes to practical issues like reading menus and limits the opportunities to mix with locals. Russian speaking hotel staff, brochures in Russian and even audio guides on city tour busses in Russian are greatly appreciated, as illustrated by the two quotes below:

“We went through the whole of Europe without speaking any foreign languages. Of course, there was some discomfort; there are more opportunities when you know a foreign language. Sometimes we wanted to talk to locals, but alas, we were not able to make ourselves understood. But in shops, cafes and museums basically you don’t need language. And if you travel not only in big cities but visit small towns and villages, very few people know English anyway.”

Post in Russian travel forum

“Best solution – touristic bus, three routes in the city [Madrid], Russian language is available in audio guides. Cheap and cheerful. 10–15 euro. All day long.”

Post in Russian travel forum

Former Soviet Union countries are more popular because the cultural differences are smaller and locals are often able to speak some Russian. Below is the experience of a Russian traveller in Prague.

“My personal experience of this spring is the following: adults above 40–45 speak Russian in Prague more and less well. Even if they don’t want to in the beginning, they prefer Russian to English. Youth, in my opinion, only speak Czech English. Those Slavs...”

Post in Russian travel forum

3.4.4 Worries about safety and security

“Something happens in a foreign country, and I do not know where to look for help!”

Russian blogger

The inexperienced traveller is especially worried about getting lost in a foreign country. Language barriers increase the difficulty of asking for information and help, as well as a sense of exclusion and the fear of being cheated. Not knowing what to do in case of an emergency is another concern.

“I cannot find the hotel and will stay on the street.”

Russian blogger

Many parents also worry about health risks. Posts in online forums advise them to wait to travel until their children are at least three years old:

“You’d better stay at home when your kid is so small [1.5 years old]. He can get enteric infection and you’ll get a very special ‘vacation’. I didn’t bring my kids to abroad until they were 3 years old. Before that I travelled with my husband while the kids stayed at home with the grandparents.”

Post in Russian travel forum

Chapter 4

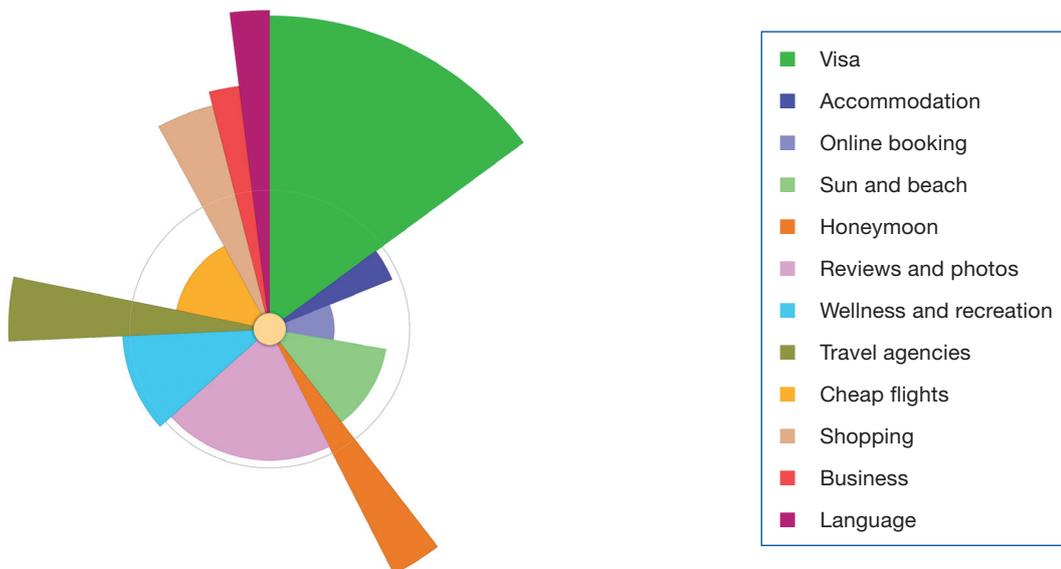
General travel themes

This chapter contains information regarding general travel behaviours of Russian travellers: what travel categories they are interested in; geographical aspects of their travel interest; and topics that are frequently discussed in relation to travel in the Russian social media sphere.

4.1 The general Russian travel interest

The character of travel-related Google searches – which reflect an important aspect of the planning phase – is in many ways different in the Russian Federation than in other major sources of outbound tourism. Figure 4.1 compares the Russian Federation’s tourism-related Google searches to those of the United States of America, Germany, the United Kingdom and France (China, the largest source of outbound tourism, was not included in the comparison because Google’s low share in that market makes comparisons difficult). Categories compared are based on keywords used in relation to the general search words “trip” and “travel.”

Figure 4.1 **Travel interest from the Russian Federation relative to other top-4 travel markets based on Internet searches**



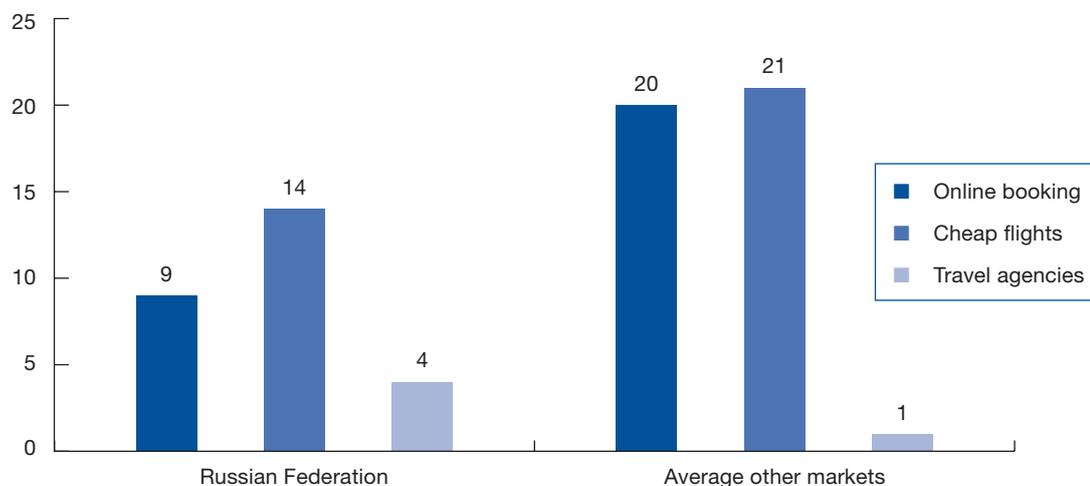
Note: Angle reflects share, radial axis indicates degree of over- or underrepresentation.

Visa-related searches do not only account for a significant share of searches (15%), but are also vastly overrepresented compared to other countries in the comparison. Other overrepresented searches in relation to travel include:

- Language (2% of travel related searches): most often the word “English”, connected to an interest in language-learning trips as well as Russian travellers’ concern with communication in the countries to which they travel;
- Travel agencies (4%): reflects the strong position that traditional travel booking channels maintain in the Russian Federation. This result is further supported by the fact that online booking and cheap flights are underrepresented search categories. Russians search for travel information and compare prices online, but tend to book their trips offline;
- Shopping (4%): a category strongly associated with Russian tourism. It should be noted, however, that while shopping is strongly overrepresented in the Russian Federation compared to other countries, it is smaller than the categories of wellness and recreation (11%) and sun and beaches (12%) within Russian travel searches; and
- Business travel (2%): an important travel category where other visa rules apply than those for leisure travel.

Nature and backpacking (<1%) are categories that are strongly underrepresented in Russian searches compared to those of other countries.

Figure 4.2 Share of travel related Internet searches: online versus offline booking (%)



4.2 Geographical aspects of the Russian Federation’s travel interest

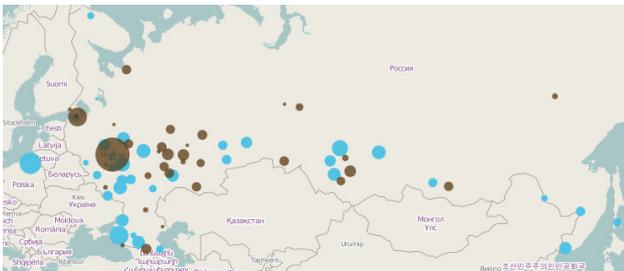
There is a strong geographical dimension to Russian travel interest. A method called factor analysis reveals patterns in how Internet search words vary across regions within the Russian Federation. Figures 4.3–4.6 demonstrate four distinct factors. The circles in the maps indicate the interest from major Russian cities, with size reflecting degree of interest. A brown circle signals a higher-than-average interest from the given city. A blue circle indicates a lower-than-average interest. The keywords are given over each map. Note that in this context, the only thing these keywords have in common is that they are most overrepresented in Internet searches from the same cities.

Geographical interest can thus be separated into the following four factors:

- An interest in independent travel, online booking and niche travel categories: destinations overrepresented in this interest type are Austria, Montenegro, the United Kingdom and Iceland. This interest is represented predominantly by Moscow and St. Petersburg;
- An interest in Asian or long-haul destinations: strongest in the eastern Russian Federation;
- An interest in northern European destinations, cruises and boat trips: strongest in the western Russian Federation; and
- An interest in Mediterranean destinations, such as Turkey, Greece and Spain: strongest in northern Russian cities.

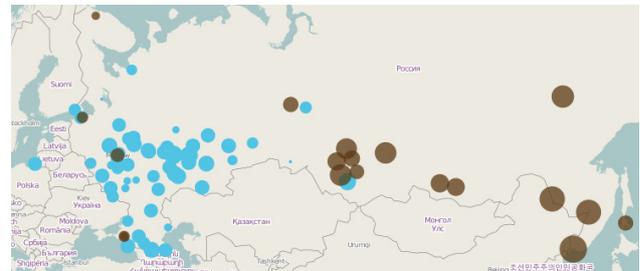
Figure 4.3 – 4.6 **Cities from which the following words are overrepresented in Internet searches**

Figure 4.3 **Flight, business, ecotourism, travel booking, honeymoon, skiing, visa, Austria, Montenegro, UK, Iceland**



Note: The biggest cities are Moscow, St. Petersburg, Kazan, Novokuznetsk and Naberezhnye Chelny.

Figure 4.4 **China, Thailand, Sanya, safari, New York, camping**



Note: The biggest cities are Vladivostok, Blagoveshchensk, Khabarovsk, Yakutsk and Barnaul.

Figure 4.5 **Sweden, Finland, cruise, boat, Poland**



Note: The biggest cities are Ryazan, Petrozavodsk, Murmansk, St. Petersburg and Belgorod.

Figure 4.6 **Turkey, Greece, Spain**



Note: The biggest cities are Kaliningrad, Surgut, Petrozavodsk, Tyumen and Nizhnevartovsk.

4.3 General travel topics

This section contains general topics that emerged from the analysis of travel discussions in the Russian social media sphere. In cases when observations from this part of the study are closely connected to a tribe, they have been included in chapter 2.

Two of the topics, namely *travel mentalities and the impact of the 2014 Ukraine crisis*, are a synthesis of different discussions and are thus difficult to quantify. The other topics are ordered by the number of social media posts discussing each topic.

4.3.1 Travel mentalities

“Even though we were there for only a few days, we tried not to be tourists, we tried to be local people.”

Russian blogger

Status for the Russian traveller is closely tied to luxury and a high standard of living. Cheaper alternative travel like backpacking is seen more as a sign of being poor than being independent. When Russians travel, they want to be comfortable, translating into a strong desire for popular recreation resorts or big cities where attractions, nightlife, shopping and restaurants are easily accessible.

“Dear all, please recommend us which district in Barcelona we should stay in??? I want to reach the main sightseeing attractions in 10 min by foot... Don't want to take metro... We'd like to spend the evening near fountains!!! Part of the day we plan to spend at the beach...”

Post in Russian travel forum

At the same time, Russians aim to avoid the most touristic places. Some bloggers describe trips to small villages located close to the big cities “away from the tourist traps” and complaints about big groups of tourists in the main destinations abound.

“Main sightseeing attractions of Venice are always crowded and one have to pave the way through the crowds of tourists, even though I was there not at the peak of the tourist season.”

Russian blogger

“If you do not like Nice or you are bored there, you can kick back in a dozen cool and rave cities, and if you don't like it in San Sebastian, the next city is Biarts, and the rest of the Biarts surrounding area is nature, beauty and tranquility – not party!”

Post in Russian travel forum

their children like. Consider the following quotation about the difficulty finding food for children in Thailand:

“Thailand, Phuket – clear sea, a lot of delicious fruits, humid climate, constant sunshine. But it is such a headache to find a place to eat 3 times per day. Not all parents are willing to feed the children Thai food.”

Post in Russian travel forum

A common vacation concept for families with non-working mothers is a long summer holiday in countries like Montenegro, Croatia and Spain. The family might rent a house where a mother and her younger children can stay for 1–2 months, while the father and older children spend a shorter time there. Staying for a long time in one place enables routines that eliminate the stress of travel. For families used to spending weekends in their *datcha* (a Russian summer home), renting a house or cottage abroad is within their comfort zone.

A winning concept: activities for children, relaxation for parents

Parents tend to narrow their travel ambitions upon having children; a trip is satisfactory as long as the family is able to spend quality time together. This happens when the children are happy and therefore destinations with child-friendly activities are selected. There are plenty of discussions online about what destinations fulfill the requirements. Russian parents tend to select destinations that are safe and comfortable, offering adventures to children and relaxation to parents. The ideal destination has amusement parks, a pool, all-inclusive food at the hotel and “animators” – actors dressed up as cartoon heroes who take care of the children for a few hours or a day, freeing up parents’ time and energy. Below are excerpts from forum posts about the perfect destination for travelling with children which highlight some common traits.

“As an independent traveller with children I visited Greece (Crete), Italy, Spain, France, Monaco. These will be some of the safest and most civilized places to relax for you and your children. There are a huge number of amusement parks and water parks in Europe – things that make children happy.”

Post in Russian travel forum

“Optimal solution: Egypt. Sun, sea, pool, meals on all inclusive, animators. You can take a your mother, grandmother and nanny with you. A great budget option for families with small children.”

Post in Russian travel forum

“Turkey is one of the most popular destinations for families with children because in Turkey there is everything – the sea, animators food ‘all included’.”

Post in Russian travel forum

A Soviet era-inspired taste for summer camps

Whereas some of the points outlined in this section do not exclusively apply to Russian parents, Russia's Soviet past has influenced one specific preference. Many Russian parents want their children to spend summers in camps, a desire that can be attributed to a Soviet history of most children attending "pioneer camps". Plenty of offerings exist for Russian children: camps at the seaside in Bulgaria, Montenegro, or Malta, language camps, dance camps and Christian camps. English camps are also held in countries where English is not spoken natively.

"This summer I will send my son to a camp in Bulgaria to improve his English a little bit."

Post in Russian travel forum

Based on the discussions about family travel, Europe's unique selling points for Russian parents appear to include safe and civilized destinations with amusement parks, water parks and seaside resorts, where food is reliable and good. Caretaking services to relieve parents from childcare duties could augment the attractiveness of a destination as well.

4.3.4 Shopping



Word cloud "shopping".

"I need a shopping therapy!"

Post in Russian travel forum

To many Russian travellers, shopping is seen as an important part of the travel experience, often combined with city sightseeing. Paris and northern Italy are typical shopping destinations. Price comparison is a common online discussion topic and tax differences are an important motivation for shopping abroad. Luxury clothing, handbags and footwear are the most sought after, sometimes with the help of a Russian-speaking personal shopping assistant. One common topic for online discussion is whether one can request a discount or not. Outlet stores provide another way to attain cheaper luxury clothes. In addition to luxury items, European brands that are not represented in the Russian Federation are sought after by other travellers.

"I spend 3000 euro on my shopping and got personal shopper service for free. She took me to all outlets in Rimini with all big brands in it. Love it."

Russian blogger

Some Russians believe that consumer goods produced for European markets are of better quality than those for the Russian market, even if they share the same brand name. Russians might thus buy everyday products when abroad, like coffee, olive oil, toothpaste and shampoo. Usually they also buy cheap souvenirs for relatives and friends, for example magnets with local motifs. There is also a tradition to bring something back for colleagues, usually sweets or alcohol.

catching on too.² Research by IDC shows that in the third quarter of 2013, the Russian Federation became the third largest global market for tablets.³ Meanwhile, research by J'son & Partners shows that app development is one of the fastest growing markets in the Russian Federation, one that the firm expects to grow eight times in the next four years.

As the user base for smart mobile devices has expanded, so has their usefulness in travel contexts. Whether in discussions surrounding accommodation, restaurants, road trips, or sightseeing, apps and mobile devices loom as a big topic. Many travellers regard free and fast wifi as an absolute necessity in hotels. Consider the following extracts from Russian blogs:

“Fast Internet is really needed in hotels, and best variant – in room and at reception. Also I often use Internet at the railway stations, metro or trains. In the cafes I use Internet, but mainly because of free access”

Russian blogger

“When I travel, I choose hotels with wifi.”

Russian blogger

Due to high tariffs for roaming abroad, Russian travellers used to avoid using their mobile phones while overseas. Recently, however, rates have dropped amidst fierce competition between mobile operators for Russian expats living outside the Russian Federation. The average rate for calls to the Russian Federation from Europe is now RUB 9 (EUR 0.2) per minute with the cheapest operator, which may vary from country to country.

Despite these changes, Russian independent travellers often buy a SIM card when they arrive at a given destination and travel agencies often hand them out as part of the package.

The word “app” in Russian travel related social media posts has grown from 0.5% of posts in 2012 to 1% of posts in 2013 and 2% of posts in 2014. Apps on smartphones and tablets are used for different purposes: finding travel and destination information (Redigo, Ask Nomad, Afisha); booking hotels and flights (Booking.com, Aviasales); rating restaurants and attractions; as audio guides; for language translation (RussoTuristo, Google Translate) and communication (Viber, Skype, WhatsApp); navigating; and for more specialized uses such as finding the cheapest petrol (Gas Buddy). For many, mobile phones have also eliminated the need to carry a camera.

Russian travellers express their preferences and needs in reviews of apps for mobile devices. They prefer apps available in the Russian language, as well as ones that offer an offline mode to avoid roaming charges.

2 ‘Svyaznoy, a mobile device retailer’ (February 2014), in Russian (online), available at: www.svyaznoy.ru/info/press-centre/?ID=1850332 (19-11-2014).

3 IDC Worldwide Quarterly Smart Connected Device Tracker, *IDC Tracker® + Data Products* (online), available at: www.idc.com/tracker/ (19-11-2014).

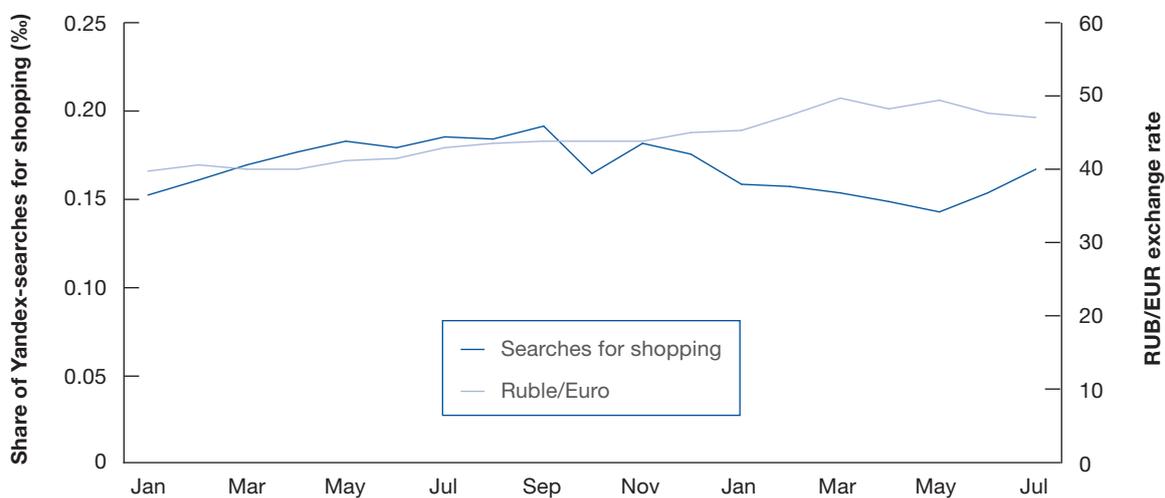
Cellular News (2013), *Russia Takes Lead In Tablets In Emerging Markets*, 16 December 2013, (online), available at: www.cellular-news.com/story/Reports/63490.php (19-11-2014).

4.3.6 The impact of the 2014 Ukraine crisis

Russian outbound tourism has fallen by up to 30% this year, according to the Russian Tourism Industry Union. Major travel agencies – IntAer, Labirint and Neva – have been forced to close, resulting in thousands of Russian tourists stranded abroad. While some think recent events may accelerate the shift towards online travel booking and independent travel, which have been less severely impacted, it could also deter less Internet savvy Russians from outbound travel altogether.

An important reason for the decline in outbound travel is a weakening rouble. The number of Yandex searches for shopping has also seen a marked decrease during the crisis, but started to recover in June 2014, as did the RUB–EUR exchange rate.

Figure 4.7 **Share of Yandex-searches for shopping (%) and RUB–EUR exchange rate, January 2013 – July 2014**



The visa application process in *normal* circumstances is an important issue for Russians who travel abroad and is frequently discussed online. Given the situation caused by the 2014 Ukraine crisis, fear of visa rejection has been a buzz topic on online forums and blogs. Social media rumours claim some embassies, notably the American, have stopped approving visas for Russian citizens and that others, such as the British, have made their application processes more cumbersome, decreasing the number of application reception desks, losing documents on purpose and so on. Uncertainty about changing visa policies has sent some Russian tourists scrambling to apply for visas immediately.

“Now with the events of a political nature I begin to doubt this trip. Possible sanctions in the form of denial of travel visas? Are there any thoughts and predictions on this?”

Russian blogger

“Tomorrow I will submit documents. Is there a possibility of NOT obtaining visas due to recent political events? I read somewhere that the Baltic states want to impose visa restrictions for Russians – what a nightmare!”

Russian blogger

“Good news! Italy and Greece officially confirmed that no sanctions will apply to tourists and they continue to follow the course of facilitation of visa regime with Russia.”

Russian blogger

“I am going to apply for a visa to USA in advance. So scared that I will not be able to travel there. It is just a collapse – Crimea, plane, sanctions...”

Russian blogger

As mentioned, the language barriers many Russians face abroad might add to feelings of alienation or anxiety around travel. Now, the fear of hostility and anti-Russian sentiment, not least during trips to European countries, is an especially significant concern. The word “worried” was used in 1.9% of social media travel posts in 2012, declined to 1.7% in 2013, but then sharply increased to 3.1% in 2014.

“A little worried about the fact that some EU countries are unfriendly to Russians. If someone just returned from Europe, please tell me about attitudes toward Russian tourists. Will travel by car in Europe. Will pass through Finland, Germany, Holland, Belgium, France. If I will be back alive – I will tell you.”

Post in Russian travel forum

Some bloggers also believe that the situation provides those who already hold negative views of Russian tourists with an excuse to further complain about them being arrogant, impolite or tasteless.

Others take a more nationalistic stance. Domestic destinations appear to gain in popularity, as some change plans and choose these instead of ones abroad.

“Our family has imposed sanctions against the EU. During May we did not go to Europe (tour business lost 4000 euro). We visited the most beautiful place in the Samara region/ Russia!!! Wonderful and beautiful places!!!! In June sanction against Spain. We will go to Crimea instead.”

Russian blogger

“I am super pissed with these sanctions and don't want to travel to Europe any more! I will spend my vacation somewhere else.”

Russian blogger

“Russia is not scared of this provocation. If Europe does not like us, we will not go there. We have Crimea.”

Russian blogger

“EU is judging us, imposing sanctions, want us to be scared of insulation and do not recognize the annexation of Crimea! But we still have a salute of victory and the people who screams ‘cheers’. Our leadership continues to confront the world community, and show the word that we don’t care. I begin to feel proud of my country and my leader.”

Russian blogger

Chapter 5

Europe-related travel themes

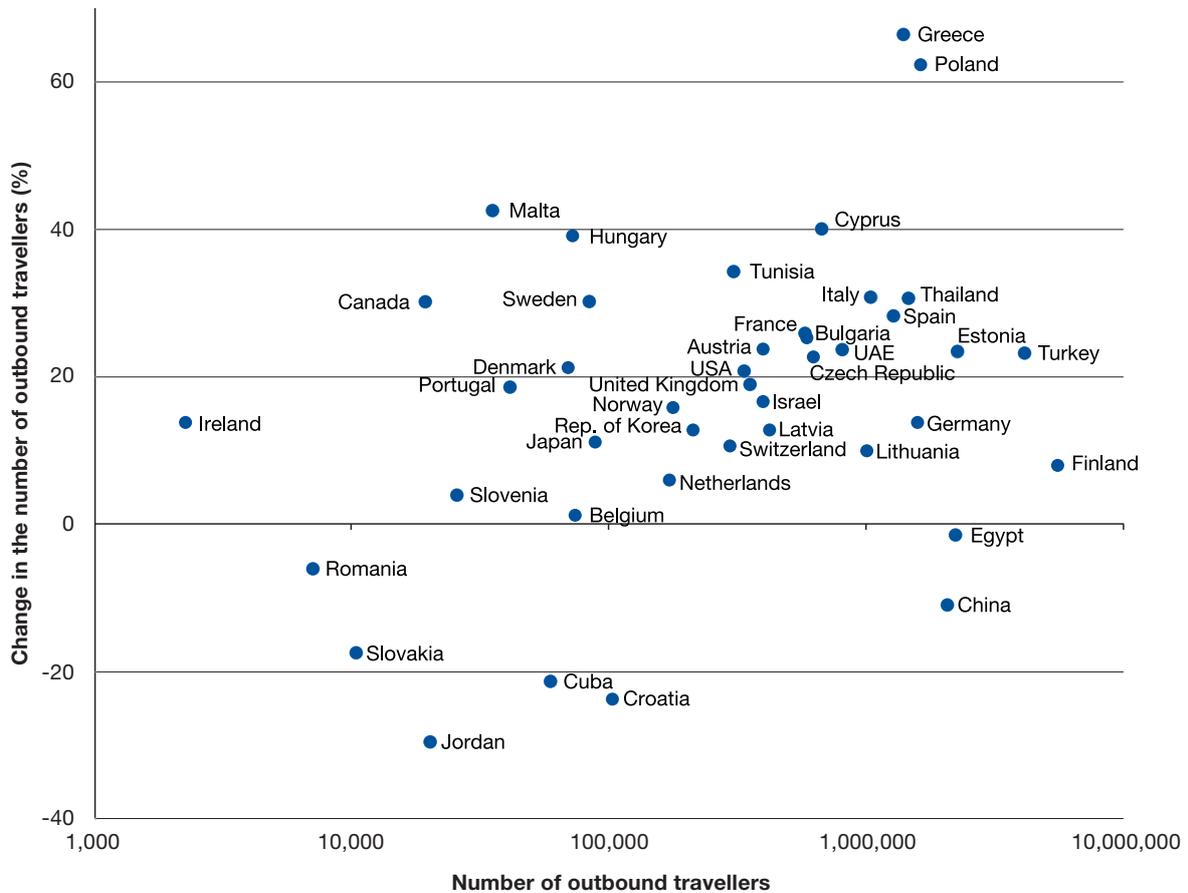
This chapter focuses on the Europe-related travel themes that emerged from the quantitative as well as qualitative analyses. These include the Russian interest in European cities and European attractions; Russian entry points into and travel routes within, Europe; Russian interest profile types of European destinations; Europe-specific topics in blogs and travel forums; and pros and cons of travelling in Europe as expressed by Russian social media users.

5.1 Russian outbound travel to Europe and key competitors

As can be inferred from figure 5.1 geographically proximate destinations (Finland, Estonia and Poland), as well as those endowed with a warm climate (Turkey, Egypt, Greece, Thailand and Spain) are the most attractive destinations for outbound Russian travellers. Destinations growing quicker than others that receive a similar number of Russian tourists include Malta, Hungary, Tunisia, Cyprus, Greece and Poland.

The make-up of travellers is varied. More than 31% of Russian travellers to Norway are business travellers, followed by Lithuania (23%) and Estonia (23%). On the other hand, almost 100% of Russian visitors travelling to Egypt, Greece, Cyprus, Turkey, Spain, Bulgaria and Malta are doing so for tourism purposes.

Figure 5.1 Change in the number of outbound travellers, 2012–2013



Note: UAE = United Arab Emirates; USA = United States of America.

Source: Rosstat data 2014.

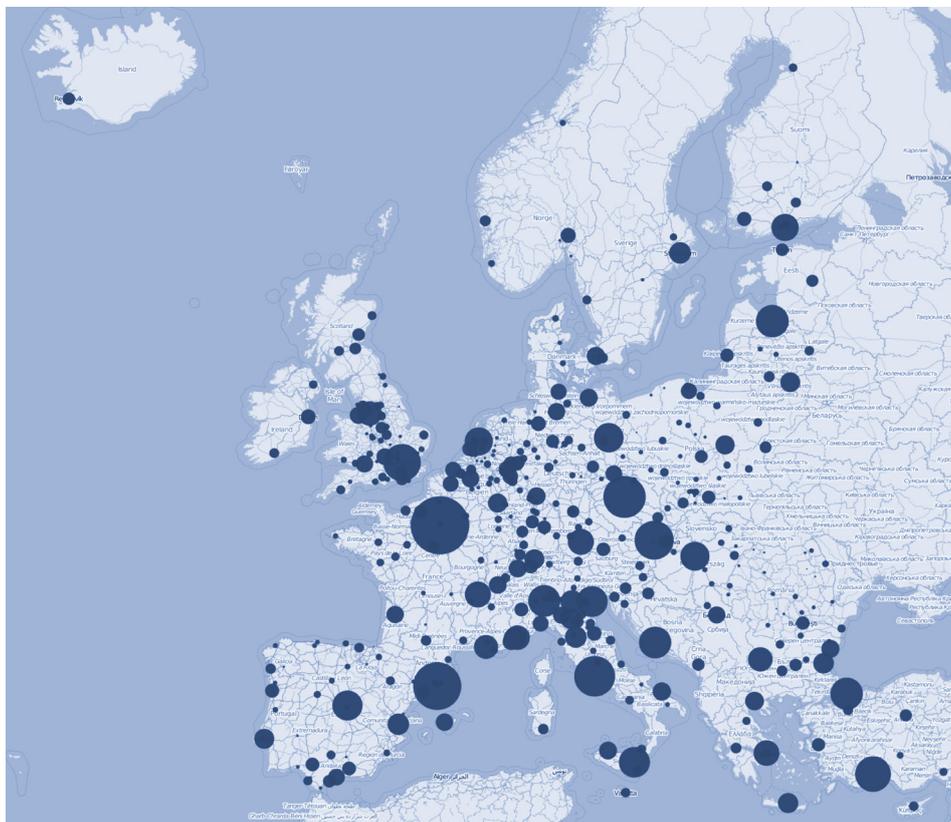
5.2 Top European city-destinations

Based on the number of Yandex searches for all major European cities, as well as cities in the competing markets China, Egypt and the United Arab Emirates, Paris holds the largest draw for Russians interested in Europe (see table 5.1). It holds nearly as many searches as the second most popular (Barcelona) and the third (Hurghada) have combined. The list is a mix of nearby capitals (Prague, Riga, Budapest and Helsinki), big cities (Paris, Barcelona, Rome, Vienna and London), seaside tourism spots (Hurghada, Antalya, Split and Catania) and cultural destinations (Venice, Lyon, Marseille, Verona).

Table 5.1 Top city-destinations

City	Searches per month	City	Searches per month	City	Searches per month
1. Paris	1,219,000	16. Madrid	168,000	31. Nice	68,000
2. Barcelona	679,000	17. Berlin	160,000	32. Stockholm	62,000
3. Hurgada	631,000	18. Budapest	150,000	33. Florence	61,000
4. Prague	459,000	19. Amsterdam	137,000	34. Valencia	61,000
5. Rome	415,000	20. Helsinki	125,000	35. Modena	58,000
6. Vienna	363,000	21. Lyon	109,000	36. Burgas	53,000
7. London	320,000	22. Munich	107,000	37. Alexandria	52,000
8. Dubai	303,000	23. Athens	104,000	38. Shanghai	50,000
9. Antalya	279,000	24. Monte Carlo	93,000	39. Heraklion	50,000
10. Riga	213,000	25. Sofia	90,000	40. Lisbon	50,000
11. Istanbul	208,000	26. Manchester	89,000	41. Vilnius	48,000
12. Split	201,000	27. Hong Kong	87,000	42. Zürich	47,000
13. Milan	200,000	28. Marseille	85,000	43. Warsaw	43,000
14. Venice	182,000	29. Beijing	77,000	44. Luxembourg	43,000
15. Catania	180,000	30. Verona	73,000	45. Thessaloniki	40,000

Figure 5.2 Interest by city

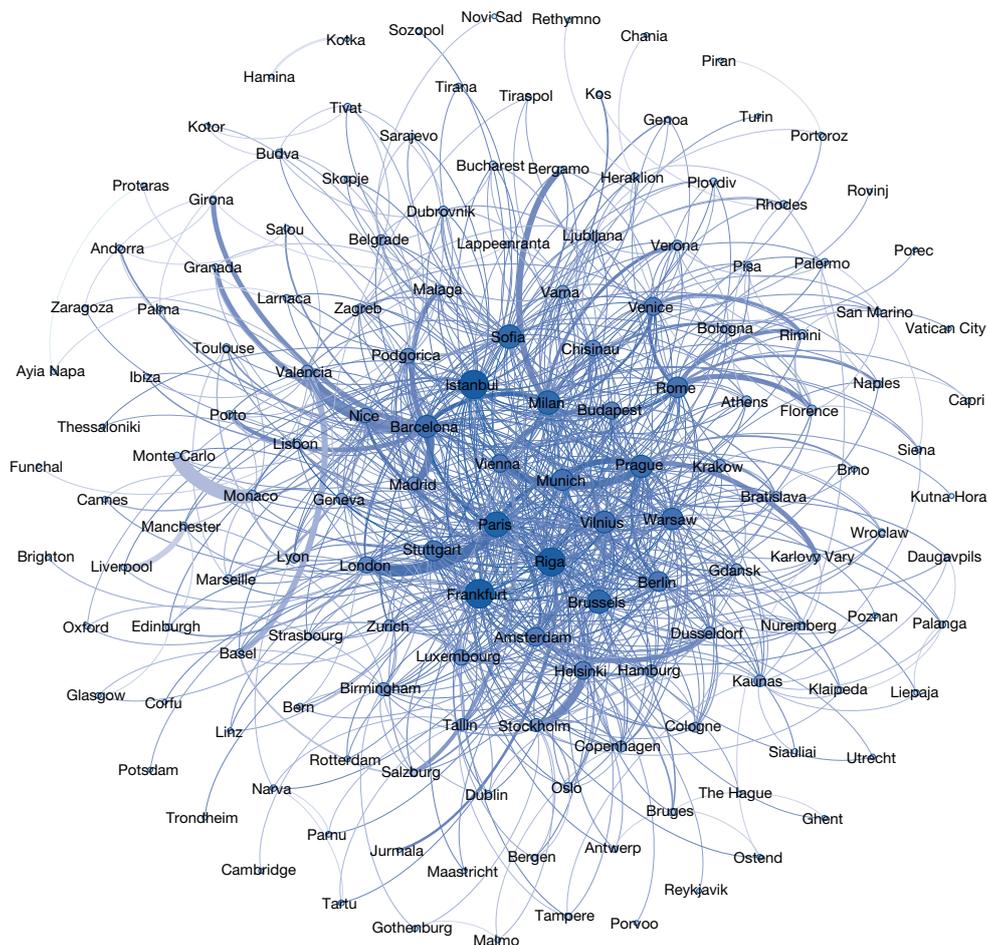


5.3 Russian travel routes in Europe

By aggregating Internet searches connecting any two European cities – for instance, “flight from Paris to London”, “train from Berlin to Munich” – a map of Russian travel routes in Europe can be constructed. The map in figure 5.3 shows a backbone of central hubs (displayed as dense nodes in the centre of the map). In the middle are the centrally located cities Paris, Munich and Prague, surrounded by Vienna, Rome, Budapest, Sofia, Istanbul, Barcelona, Frankfurt, Riga, Vilnius, Warsaw, Brussels, Stuttgart and Berlin. These cities appear to be the primary hubs of Russians’ travel routes in Europe. There is then a second layer of less central cities, such as Helsinki, Chisinau and Bratislava. In the periphery, off the main network of routes, are the less-frequented cities.

This network’s structure tells us something about how Russians travel in Europe; if travellers selected a single country and travelled between cities in that country, the network would display country-based clusters of cities, each cluster representing one country, with weak ties between these clusters. What we see instead is a core of strongly connected cities in several countries in western, central and eastern Europe, with secondary cities located in the network’s periphery. This structure suggests that Russian tourists tend to visit cities in two or more countries during the same trip.

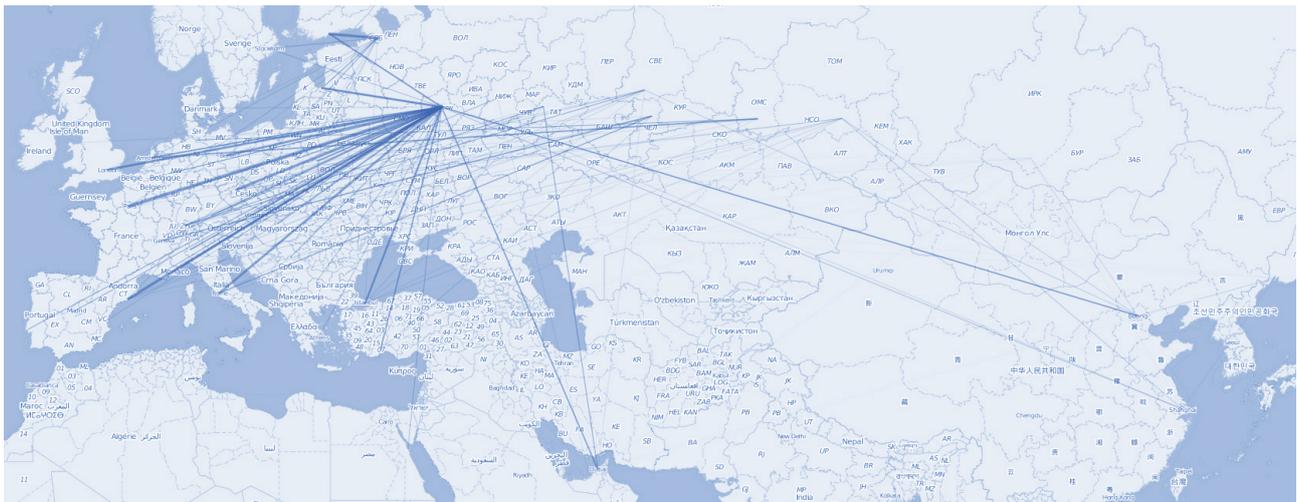
Figure 5.3 Route network for Russian travellers based on Internet searches



5.4 Russian entry points into Europe

Based on Internet searches involving a Russian and a European city (such as “flight from Moscow to Paris”), figure 5.4 shows the major entry points into Europe and other selected places. The most important ones are from Moscow to Paris, Barcelona, Prague, London, Rome, Berlin and Riga; as well as from St. Petersburg to Helsinki and Riga. Unsurprisingly, there is a stronger tendency to travel east, rather than towards Europe, for cities in the eastern Russian Federation.

Figure 5.4 Entry map based on Internet searches



5.5 Top European attractions for Russian travellers

The list of top attractions, based on the number of Internet searches in the Russian Federation, is relatively traditional; places like the Colosseum, Eiffel Tower and Acropolis take precedence. The Rose Valley in Bulgaria, Charles Bridge in Czech Republic and Hill of Crosses in Lithuania push the centre of gravity eastward. Nonetheless, the most frequently-searched terms are western European attractions and, on the whole, the list resembles a typical “Places to visit before you die” list.

Table 5.2 Top attractions

Attraction	Country of location	Number of monthly displays
1. Colosseum	Italy	66,332
2. Eiffel Tower	France	44,914
3. Vatican City	Italy	26,208
4. Arc de Triomphe	France	24,482
5. The Louvre	France	19,785
6. Acropolis	Greece	14,564
7. Notre Dame Cathedral	France	12,980
8. Great Wall of China	China	10,508
9. Big Ben	United Kingdom	9,869
10. Sagrada Família	Spain	8,154
11. The Manneken Pis	Belgium	7,886
12. Leaning Tower of Pisa	Italy	7,449
13. The Rose Valley	Bulgaria	7,316
14. Pyramid of Cheops	Egypt	7,206
15. Park Güell	Spain	6,613
16. Alhambra	Spain	6,063
17. Burj Khalifa	United Arab Emirates	5,963
18. Neuschwanstein Castle	Germany	4,756
19. Terracotta Army	China	4,540
20. Casa Milà	Spain	4,074
21. Forbidden City	China	3,765
22. Hyde Park	United Kingdom	3,418
23. The Berlin Wall	Germany	3,175
24. Charles Bridge	Czech Republic	2,744
25. Hill of Crosses	Lithuania	2,651

5.6 Interest profiles of European destinations

When searching information online about individual European countries, Russian interests span a wide range of topics. Table 5.3 shows the most prevalent searches. Recreation tops the list, followed by attractions, transportation, accommodation and activities. Shopping is a much smaller category than might be expected, lower on the list than topics like food, culture, clubbing, camping and nature. This might be because people are already familiar with what the primary shopping destinations are and do not need to search for information about them. It may also be the case that, rather than using the word “shopping”, travellers search for specific products, labels, or regional specialties. A third explanation might be that nearly every major city now offers luxury and other types of shopping, rendering searches unnecessary.

Table 5.3 Russian searches in combination with European countries

Topic	Search index	Topic	Search index
Recreation	100	Unspecified travel	9
Attractions	60	Camping	9
Transportation	52	Nature	8
Accommodation	38	Shopping	8
Activities	22	Wellness	7
Food	19	Prices and reviews	5
Culture	16	Winter holidays and skiing	4
People	14	Honeymoon	4
Business and education	13	Cruise	4
Clubbing	11		

Each country has a unique interest profile, but it is possible to detect similarities between countries. Figure 5.5 clusters countries based on their interest profile using a method called multidimensional scaling. Countries with a similar interest profile attract each other while those with large differences repulse each other. This results in a self-organized map where countries that attract a similar type of interest from Russian Internet users cluster together. The axes have no inherent interpretation, but countries near each other have similar interest profiles.

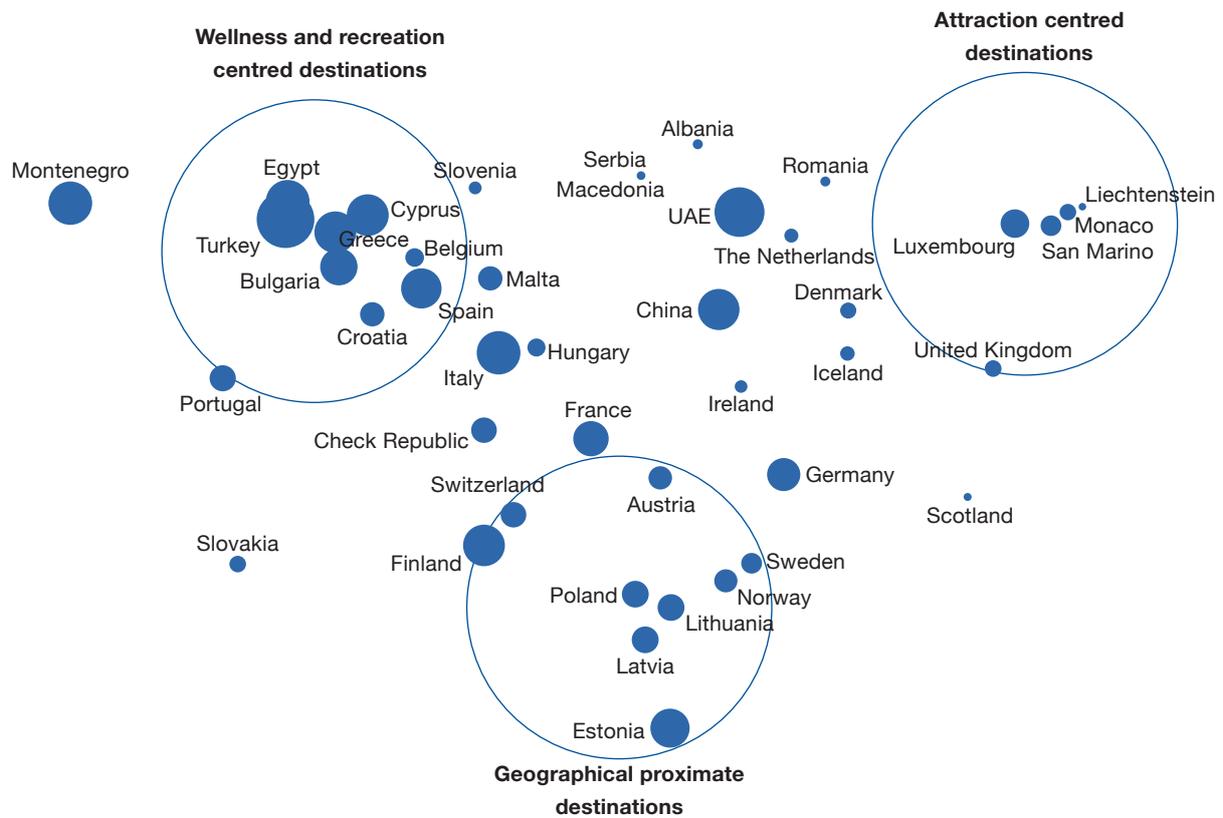
The self-organized map has three corners, each representing an interest type:

1. Most of the destinations in the top-left corner – Egypt, Turkey, Greece, Cyprus, Bulgaria, Croatia, Spain, Portugal and Malta – are characterized by a focus on beaches and recreation. However, because of the ambiguity of some searches characterizing such destinations (the Russian word “отдых” translates to “wellness” or “relaxation” and can refer to spending time on a beach as well as in a spa), Belgium (where the word “spa” has its origins) is located here too;
2. The destinations in the top-right corner have attractions as a large share of their interest profiles. This is especially the case for city states like Monaco, San Marino, Luxembourg and Liechtenstein; and
3. In the bottom corner are destinations whose interest profiles are dominated by transportation; they are neighbours of the Russian Federation, like Poland, the Baltic and Scandinavian countries. In these countries, camping is also overrepresented.

Between these three nodes are destinations with various combinations of interest categories. The most extreme profile is Montenegro’s, which is completely dominated by clubbing, followed by recreation. Each country’s interest profile can be found in the annex.

The three non-European top competitors, the United Arab Emirates, Egypt and China, appear to compete in different directions. Egypt is strongly associated with recreation and winter holidays; the United Arab Emirates is associated with attractions and culture; China is associated with attractions, business and education trips.

Figure 5.5 Interest-based destination clustering



Note: UAE = United Arab Emirates.

5.7 Europe-specific travel topics

This section describes topics that emerged from the analysis of Russians' online discussions about travel in Europe. They are presented here in alphabetic order. Ordered by the number of posts involved in each topic they are:

1. Weekend and culture trips;
2. Gastronomic travel;
3. Camping and nature; and
4. Winter sports.

Quantitative text analysis was used to identify themes; qualitative netnographic analysis was used to understand and describe them.

they learn to make Italian pasta and pizza, as well as to factories where the production process is demonstrated. The rest of the week-long tour features a visit to a vineyard, a seafood restaurant, a pizzeria and a sampling of Italian snacks. The price for the trip is EUR 1,200 per person.

The trip described above is longer than the average. Most food-themed trips take place over a weekend, or an extended weekend and can span from sausage and beer in Prague to Michelin starred restaurants in Paris. Note that a major focus of the trip is on education, letting the travellers acquire new skills and knowledge through cooking classes and study visits. The social element and local culture is all but completely left out.

Beer is an even bigger keyword than food and something that Russian travellers appear to take very seriously; attending a beer festival appears to be the perfect way to combine the gastronomic and the social. Oktoberfest is the best-known beer festival, but true beer connoisseurs prefer smaller, less marketed events. As illustrated by the blog extract below, Czech Republic is known as a destination with good and cheap beer.

“To sum up: Oktoberfest is a must see and is worth visiting at least once, but in Czech Republic beer costs 20 times less and is very good.”

Russian blogger

All the same, Russian travellers are annoyed by the stereotype of Russian tourists drinking too much.

“Russians drink a lot and behave like swines? Hey, guys, let’s have a look at tourists’ feedback from, let’s say, Turkey. Who are the main swines there? Prepare for a surprise – Germans! Russians drink a lot? Have a look at the statistics and prepare for another surprise – Finns, Germans, Poles, Irish and Canadians drink no less.”

Post in Russian travel forum

Food as simply food

“Tell me about how to find good, cheap food in Spain, please. We always end up spending a huge amount of money on food but I would like to minimize that expense.”

Post in Russian travel forum

When food is not the object of interest, the best food is the food that does not cause any trouble. It should be reasonably priced to leave money for what really matters; it should be healthy to avoid stomach problems; and good restaurants should be easy to find to free up time for other important activities.

One of Europe’s unique selling points (USP) is variety, with active knowledge about the different regional specialties making it a more attractive place than, say, China, where regions are less well-known. Relaxation, experience, acquisition of skills and status markers all feature heavily within this.

5.7.2 Weekend and culture trips



Word cloud "weekend and culture trips".

An online travel agency specializing in weekend tours offers over 25 different themed trips to the most popular European destinations. The agency takes care of the visa process and suggests a to-do list, but the travel is independent without groups or guides. Examples of themes include 'Funky weekend in Vienna' (EUR 275 per person), with suggested to-do points including a classical music concert, a photo exhibition and an exhibition with early Picasso works; 'Hip and cheap weekend in Istanbul' (EUR 250 per person) with highlights such as an exhibition by a famous Russian artist and gastronomic experiences; 'Premium weekend in Berlin' (EUR 325 per person) offering art and photo exhibitions; and an 'Amélie weekend in Paris', where the traveller can walk in the footsteps of the film character Amélie.

The examples above capture elements of city trips that are commonly featured in photographs shared online by Russian travellers:

1. Cultural elements, especially art and photo galleries, concerts and exhibitions. Many photos from weekend trips can be found that display street art, design in shops and interesting architecture;
2. A Russian connection, for instance in the form of a famous Russian artist. This might be because Russians' awareness of European icons is relatively low, which would explain why those movies that are well known, such as Amélie and In Bruges, are often used to help Russians relate to destinations; and
3. A local representation, such as the classical concert in the Vienna trip above. Photos often show street scenes with crowds and people watching. Such photos put the traveller in the position of either observer or active participator, indicating immersion into local culture. The latter is especially the case with street festivals and other festive activities.

5.7.3 Camping and nature



Word cloud "camping and nature".

Camping mainly attracts those who are already enthusiasts and because the general Russian traveller relates Europe to better living conditions, comfort, service and infrastructure, the majority wish to experience this over camping when travelling in Europe. Finland is the most popular destination for camping, because it is easy to reach by car and has affordable prices and beautiful natural scenery. People go there for fishing, sauna, walks and sometimes to rent villas and cottages.

“Finland has cozy forest, spacious roads and beautiful lakes. I will go there again with family and tents.”

Russian blogger

“We go to Finland for fishing twice a year in summer and in autumn. Licenses [for fishing] are registered by owners of the cottages where we stay. Before booking a cottage we also ask what fish can be fished in the lake, depth of the lake; we also talk to the owners about which places that are better [for fishing], and which that are worse.”

Post in Russian travel forum

Even those who go to Europe to enjoy nature can be surprised at the natural beauty they encounter.

“I am going for the first time to Switzerland, the priorities are nature, beautiful views and pictures; the cities are interesting, but less interesting than the nature (I've been several times to Germany, Austria – I think the cities are roughly the same).”

Post in Russian travel forum

“I liked Crete, and the nature is actually more interesting and more diverse than the attractions.”

Post in Russian travel forum

“In Norway, all this together – the mountains, the fjords, the ocean, the islands, the rivers, the lakes, huge waterfalls and kilometer steep walls created absolutely amazing scenery.”

Post in Russian travel forum

5.7.4 Winter sports



Word cloud “skiing”.

Winter sport tourism is becoming more popular among Russians, as measured by the number of social media posts mentioning the topic as well as the number of Internet searches. The latter grew 15% between 2011 and 2014. The Alps are the ideal destination, while Poland, Slovakia and Finland are cheaper options.

“I got sick of mountains not so long ago – about 8 years ago. For vacation I usually choose a huge region that was created by nature and then slightly “upgraded” by humanity in order to make it more suitable for skiing. Of course it is the Alps, and though they are located on the territories of 7 countries, I focus on three of them – Austria, Italy, France”

Post in Russian travel forum

5.8 Pros and contras of travel to Europe

Russian travellers post both positive and negative experiences from their travel in Europe online. Based on a sentiment analysis and a qualitative reading of a sample of social media posts, the main positive and negative aspects associated with travel in Europe expressed by Russian travellers are highlighted in this section.

5.8.1 Positive aspects

Below are the most common positive aspects of travel in Europe mentioned in Russian social media. They are ranked by number of mentions.

- Great sightseeing and lots of places of interest;
- Large selection of budget accommodation and food;
- Great shopping;
- Clean towns, streets, roadsides, railway stations;
- Pavement of good quality;
- Picturesque nature;
- Positive, friendly, smiling people on the streets;
- Tasty food;
- Service at hotels and restaurants;
- Relatively short flight time to European countries (from western Russian cities);
- Developed and comfortable city infrastructure;
- General peace and stability, safety on the streets at night;
- Kind attitude to children, a lot of children friendly places with necessary equipment;
- Disabled friendly; and
- Polite drivers (towards pedestrians and other drivers).

“Europe is the cultural capital of the world!... I will definitely go back to Europe on my next vacation.”

Post in Russian travel forum

“We fell in love with Paris and want to visit it again and again. Wherever you look – history, glamour, style.”

Russian blogger

“I wonder why people in Europe are cheerful and smiling, and in Russia – gloomy, angry and hate each other?”

Post in Russian travel forum

“If compare roads in Europe and in Russia, you’ll notice that almost in all European countries roads are in good condition, with correctly located road signs, many highways, and polite drivers”

Russian blogger

“By the way in Germany everything is for mums with strollers and for people with disabilities – ramps, elevators everywhere, public transport with low level floor (same level with road)”

Russian blogger

5.8.2 Negative aspects

Below are the most common negative aspects of travel in Europe mentioned in Russian social media. They are ranked by number of mentions.

- Quality of accommodations (most negative impressions are related to budget hotels);
- Service at hotels and restaurants;
- Lack of Russian language information in hotels, restaurants, cafes, museums;
- Some European countries are too expensive;
- Dirty, littered streets (especially in Paris);
- Long queues to the (famous) museums (mostly in France);
- Short opening hours in shops and museums (in some countries);
- Thieves;
- Toll roads and expensive parking;
- Traffic jams;
- Hard to use public transport;
- Food; and
- Possible negative attitude towards Russians.

“On the third day of our vacation we were robbed. When we were absent, someone cracked the safe and stole 2 I-phones, 1 I-pad, 1 expensive photo camera Canon and 5,750 euro in cash; we planned to buy a fur coat. I should mention that the thieves were “nice to us” and left our passports, insurance, visa cards and old mobile phone. This is the first time this happens to us!”

Russian blogger

“Veliko Tarnovo – the old capital of Bulgaria. I did not like it! The city is poorly suited for tourists, at the bus stops there is no room for the bus, sometimes there is not even a bus stop! You can understand it only if you see that local people standing there waiting for something.”

Post in Russian travel forum

“Frankly I knew that food in the UK is pretty bad, but I did not expect it to be that bad. I booked a quite expensive hotel in south Kensington (breakfast included). But the food was horrible.... One word – porridge.”

Post in Russian travel forum

[About Hungary] “I could not find a menu in Russian anywhere! And nobody speaks Russian. Titles and notices are replicated into English only. And you cannot understand Hungarian intuitively as, for instance Czech.”

Russian blogger

Chapter 6

Conclusions and recommendations

Based on the results of this study, a SWOT analysis was carried out identifying strengths, weaknesses, opportunities and threats for Europe as a destination for Russian travellers. Key recommendations emerging from this analysis are presented in section 6.1 and further elaborated on in section 6.6. An overview of the SWOT analysis is provided in section 6.2 and the results are described in detail in sections 6.3, 6.4, 6.5 and 6.6. Social media marketing success cases are described in section 6.7.

6.1 Key recommendations

- **Speak Russian with the Russians:** make it easier to get around as an independent traveller by ensuring Russian-friendly printed and digital information resources;
- **Set clear standards** that hotels and other entities need to live up to in order to be labelled “Russian tourist friendly”;
- **Identify the Russian connections** that may exist to your destination to compensate for low awareness of European icons and build your marketing around them;
- **Look east!:** make yourself attractive as a long-haul destination to Russians east of the Ural Mountains rather than just targeting western cities of the Russian Federation;
- **Cherish the undiscovered:** as a smaller destination, speak to Russian-speaking travellers’ “away from the crowd” ideal;
- **Team up with other destinations:** for large as well as small destinations, collaborate and find shared concepts with destinations that are close to yours in Russian-speaking travellers’ route networks (see figure 5.3);
- **Tap into current trends and successful platforms:** use a bottom-up approach to social media marketing, connecting to current trends rather than building marketing messages in isolation (see section 6.7 for success cases). Work with social media influencers and make yourself available through popular social platforms and travel apps;
- **Think in terms of tribes:** ensure that your offer appeals to one or more of Russian travel tribes, ranging from inexperienced group travellers to wealthy world citizens. Find your niche in areas that Russian travellers express appreciation for, such as recreation, gastronomic travel, themed weekend trips and nature and wildlife;
- **Be as accessible as you can:** improve visa procedures as much as possible within the regulatory frames that apply;
- **Make yourself resilient,** to the greatest possible degree, to potential continued deterioration of relationships with the Russian Federation by maintaining an open and welcoming attitude to Russian tourists; and
- **“Future-proof” your offer** to Russian tourists by providing products that take the possibility of a weaker rouble into account. Be prepared for a scenario where Russian tourists’ current shopping habits do not last.

6.2 SWOT overview

The figure below provides an overview of strengths, weaknesses, opportunities and threats for Europe as a destination for Russian travellers. These are further developed in the sections below.

Figure 6.1 **Overview of strengths, weaknesses, opportunities and threats (SWOT) for Europe as a destination for Russian travellers**

<p>Strengths</p> <ul style="list-style-type: none"> - Aspirational destination; - Diversity and variety; - Described as “clean and civilized”; - Children-friendly; - Similar but not too similar; - Cultural resources; and - Beautiful nature. 	<p>Weaknesses</p> <ul style="list-style-type: none"> - Language and culture barriers; - Difficult visa procedures; - Low Russian awareness of European icons; - Not always able to live up to expectations; - Accommodation considered to offer low value for money; and - Worse-than-expected service.
<p>Opportunities</p> <ul style="list-style-type: none"> - Independent travel; - “Russia connection”; - Eastern Russia; - Niche products; - “Away-from-the-crowd”-mentality; - Collaboration between destinations; - Bottom-up marketing; - Recreation beyond the beach; - Benefitting from diversity; and - Improving visa procedures. 	<p>Threats</p> <ul style="list-style-type: none"> - Ukraine crisis: weak rouble, restructure domestic politics, European visa restrictions, fear of hostility; - Low-price competition for recreation trips; - Competitors offering better visa policies; - Asian cities becoming more hip; and - Increasing Internet and e-commerce regulation threatens online booking.

6.3 Strengths

- Europe is an aspirational destination, home to places and brands that are strongly associated with status in the mind of the Russian traveller;
- Containing many countries with different characteristics, Russians appreciate the diversity and variety that Europe offers in terms of shopping, dining, physical environments and tourism products;
- Russian travellers describe Europe as “clean and civilized”, which for some means children-friendly travel and for others translates into a good place to relax;
- Europe is similar but not too similar to the Russian Federation. For inexperienced travellers, destinations exist where the cultural differences are small;
- Europe is known as a destination with enormous cultural resources; and
- Russians are becoming increasingly aware of Europe’s natural tourism resources.

6.4 Weaknesses

- Language and cultural gaps are important obstacles, particularly to inexperienced and less culturally affluent travellers. Russian travellers complain about the lack of tourism information in Russian and the difficulty of communication;
- Countries with difficult visa application procedures lose out to competing destinations with simplified or no visa requirements;
- There is a relatively low awareness of European icons in the Russian Federation, making attractions connected to, for example, famous historical people less attractive to Russian travellers; and
- Travellers get disappointed when the expectations listed under Strengths are not met. For example, many Russian travellers perceive accommodation in Europe to offer low value for money with service that is worse than expected.

6.5 Threats

A prolonged Ukraine crisis and remaining instability would give rise to several threats:

- A weak rouble that holds Russian tourists and shoppers back;
- Restrictive policies and statements within the Russian Federation that adversely influence Russians' willingness or ability to travel abroad;
- Increasing difficulty to get a visa to European countries; and
- A fear of hostility that may tip the balance in favour of destinations perceived as more hospitable and uncomplicated.

Threats related to competing destinations:

- Low-price competition for recreation and relaxation trips;
- Competing destinations that are simplifying or abolishing their visa requirements faster than European destinations; and
- Asian cities, such as Seoul and Shanghai, becoming more developed and thus attractive to a group of travellers that would otherwise travel to European cities.

Threats related to the recent wave of Internet regulation:

- New rules targeting foreign payment systems and storage of Russian citizens' personal data on foreign-based servers may stifle the development of online travel booking and e-commerce in general; and
- New rules that subject bloggers with more than 3,000 followers to the same standards as professional journalists may reduce the number of bloggers and shift the landscape of influence away from online opinion leaders towards policy makers that may not favour Europe as a destination.

6.6 Opportunities

- Addressing Russian travellers' complaints about the lack of tourism information in Russian, European destinations have an opportunity to make it easy to get around as an independent traveller. This includes making sure printed materials – maps, tourism information, etc. – is available in Russian, but also to ensure the availability of digital resources. Rather than developing their own smartphone apps, organizations can add information to the existing

- travel apps that are already popular among Russian travellers. Tapping into networks of local Russians, destinations can also facilitate independent travellers' search for personal guides and shopping assistants;
- Given Russians' relatively low awareness of European icons, destinations can benefit from identifying their "Russia connection". Are there any local Russian artists or designers, any Russian cultural expressions, or any historical connections to the Russian Federation? Such components are only minor parts of the trips, but can make a big difference;
 - Russians travelling in Europe are mainly from the western part of the country. This means there is plenty of untapped potential east of the Ural Mountains, with the travellers who more readily select Asian and long-haul destinations than European ones. These travellers have similar preferences as their peers in the western part of the country, but the location makes their circumstances entirely different: to them, Europe is a long-haul destination with cumbersome visa procedures. In order to sway them, European destinations need to clearly communicate what sets them apart from other long-haul destinations. It would also be beneficial to accelerate visa processes, for example by dealing with applications somewhere in the west of the Russian Federation rather than in Moscow or St. Petersburg;
 - There are additional opportunities within the geographical variations in travel interest. The two major cities, Moscow and St. Petersburg, display a higher-than average interest in niche products like gastronomic tours and ecotourism, as well as in weekend and extended weekend trips. To target this group of travellers, European destinations can design themed weekend trips that match their unique selling points to current trends and preferences;
 - "Away from the crowd" and to a lesser extent "off the beaten track" summarizes an important preference of many Russian travellers that could translate into opportunities for smaller, less visited European destinations;
 - Given Russian tourists' tendency to travel between major cities, peripheral destinations might need to coordinate with more central hubs to lure travellers;
 - Popular destinations that are closely connected in the network of popular inter-city travel routes can collaborate and find shared concepts, benefitting from the fact that they share the same travellers;
 - With traditional marketing channels crowded and online and mobile channels growing, social media marketing offers the potential to reach out to young people in particular. Rather than creating campaigns top-down, marketers should consider a bottom-up approach where marketing messages ride the wave of current trends. They can do so by connecting to phenomena that are hot and on the rise in the Russian social media sphere. Burj al Arab's invitation to the photoblogger behind the #Followmeto meme is a good example of this approach;
 - Recreation is the biggest theme in the online Russian travel discussion, but appears to primarily benefit beach destinations. A challenge for non-beach destinations is to take the concept of recreation beyond the beach in the mind of the Russian traveller;
 - Building off the strength of diversity and variation, destinations should clearly communicate what sets them apart in terms of shopping, food and the physical environment;
 - Destinations have an opportunity to make themselves more attractive, by making visa procedures as easy and fast as possible within the regulatory frames that apply; and
 - Travel competes with non-travel products: why travel to shop, eat and experience culture abroad when it is possible to do these things locally or at home? To convert non-travellers into travellers, things that motivate people to explore new environments – the urge to broaden one's horizon; the pursuit of status – should be linked to Europe's selling points such as high quality and great variety.

6.7 Social media marketing success cases

There are remarkably few examples of successful tourism campaigns that utilize Russian social media. A Russian social media marketing professional that was interviewed for this section explained that most companies prefer to promote tourism through TV commercials and billboard ads due to the still-dominant position of these more traditional media outlets, particularly TV (see section 1.2.2). Given the large number of devoted social media users in the Russian Federation and the importance they ascribe to social media as an information source, however, the potential is huge. The cases highlighted below show how some companies have begun to tap this potential.

6.7.1 #Followmeto Burj al Arab

A recent Russian influencer is photographer Murad Osman, who immortalizes his travels around the world by photographing his style-conscious girlfriend, Natalia Zakharova, as she leads him by hand towards a beautiful and usually exotic backdrop unique to the destination they visit. He posts the photos on Instagram under the hashtag #Followmeto (originally its Russian equivalent), not only making himself and Ms. Zakharova famous, but also starting a trend with now over 120,000 photos posted on Instagram by people across the Russian Federation. Ms. Zakharova was invited onto TV shows and became the editor of a magazine, becoming an example of an online influence transitioning to traditional media, thereby reaching new groups.

Burj al Arab in Dubai invited the couple, along with social media opinion leaders from other parts of the world, for a free trip to Dubai and a stay at the 5-star hotel in exchange for photos featuring the hotel posted on Mr. Osman's photoblog. The campaign was a smart way of surfing on the couple's celebrity status and linking the luxuriousness of the hotel with the celebrated style of Ms. Zakharova and Mr. Osman's photography.

6.7.2 Catch an S7 Airlines airplane

In May 2014, S7 Airlines launched the app Catch-a-plane with which users collect miles each time an S7 airplane, or other planes within the Oneworld Alliance, flies above them. When the right airplane passes by, the application sends a notification with information about the airplane and its route. The user can then collect bonus miles by pressing the button "Catch-a-plane." The project was picked up in many travel blogs and forums, helping it gain momentum with users.

While the campaign increased the company's exposure to consumers, S7 Airlines was already known for its creative advertising campaigns involving inspirational and social elements. A YouTube video that went viral after its launch in October 2013 features a giraffe-shaped climbing frame. A playground incident with a football changes the giraffe's perspective on the world and it embarks on a journey that takes it to snowy landscapes, rock concerts and stunning beaches, ending up on a savannah with real giraffes. The original video has been watched more than 100,000 times on YouTube.

6.7.3 AviaSales enrolls bloggers and social groups

AviaSales.ru is the largest Russian search engine for flight tickets and price comparisons. In order to gain more users, the company released an application that can be integrated into webpages, blogs and social networks. The application can be used to search flights directly from a famous travel blog or popular social group. The blogger or site owner then gets a kick-back on sales, which can be as high as 60% of the profit. This generosity has guaranteed its spread and has increased AviaSales' reach. Several top bloggers – perhaps best-known being Zyalt (Ilya Varlamov), the number one blogger on the popular blog platform Livejournal – integrated the application and recommended it to their followers.

6.7.4 De Cecco sells pasta through virtual tours

While not in the travel industry, the Italian olive oil and pasta producer De Cecco tapped into the Russian Federation's travel aspirations in their new website. The site takes visitors on a virtual tour to 20 regions and lets them read about the cuisine of each place. This way of connecting the idea of gastronomic travel with De Cecco's products has shown success in Russian social media.

6.7.5 Onetwotrip's gastronomic tour quiz

In a collaboration between the air ticket sales website, Onetwotrip.com and the popular entertainment site Adme.ru, visitors to the latter are invited to take a quiz. To pass the quiz they need to correctly identify the country of origin of the food shown in each photo – for example, whether it is foie gras from France or Mortadella from Italy. Those who get all the answers right receive a promotional code to buy a ticket for a gastronomic trip through Onetwotrip.com.

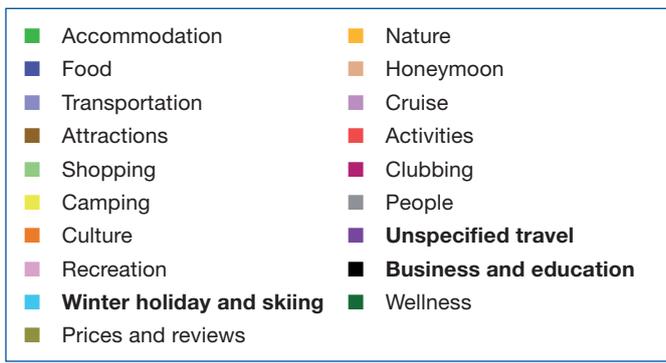
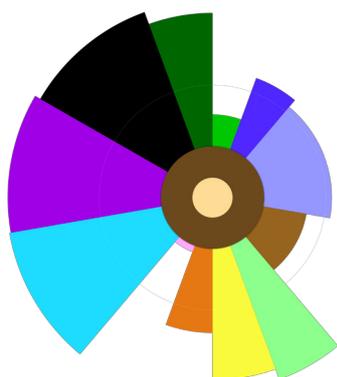
Annex I

Travel information by destination

Austria

Mentioned in number of blog posts:	57,133
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Krasnodar, Novosibirsk, Samara, Voronezh, Perm
Most discussed cities and regions:	Vienna, Salzburg, Innsbruck, Graz, Linz
Number of Instagram tags:	48,144
Top photo motives:	Alps, fields, architecture, sweets, porcelain

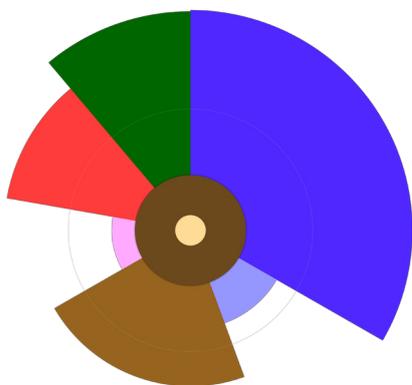
Interest profile based on Russian Internet searches:



Belgium

Mentioned in number of blog posts:	45,316
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Krasnoyarsk, Voronezh, Perm
Most discussed cities and regions:	Brussels, Bruges, Ghent, Antwerp, Liège, Charleroi, Namur
Number of Instagram tags:	22,269
Top photo motives:	Architecture, beer, chocolate, waffles

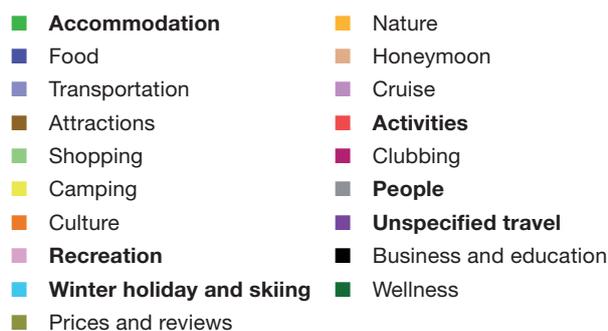
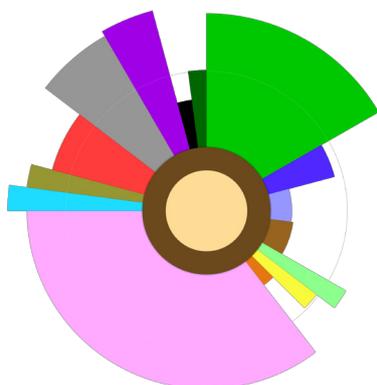
Interest profile based on Russian Internet searches:



Bulgaria

Mentioned in number of blog posts:	74,696
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Novosibirsk, Perm, Ufa, Omsk, Samara
Most discussed cities and regions:	Sofia, Burgas, Varna, Stara Zagora, Plovdiv, Pleven, Sliven, Rouse
Number of Instagram tags:	73,159
Top photo motives:	Beach, sea, seagulls

Interest profile based on Russian Internet searches:



China

Mentioned in number of blog posts:	302,575
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Novosibirsk, Nizhny Novgorod, Rostov-on-Don, Krasnodar, Krasnoyarsk, Chelyabinsk, Irkutsk
Most discussed cities and regions:	Hong Kong, Beijing, Shanghai, Xi'an
Number of Instagram tags:	98,900
Top photo motives:	temple, street food, sweets, panda, clothes markets, tea

Interest profile based on Russian Internet searches:



Croatia

Mentioned in number of blog posts:	27,677
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Voronezh, Krasnodar, Samara, Ufa
Most discussed cities and regions:	Split, Zagreb, Rijeka
Number of Instagram tags:	26,492
Top photo motives:	Sea, yacht, tiny streets

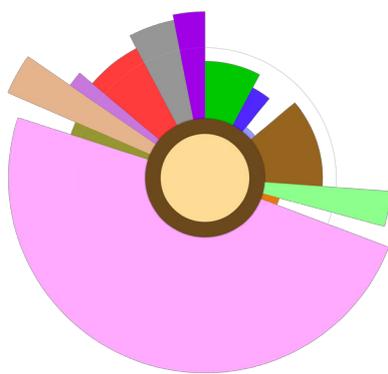
Interest profile based on Russian Internet searches:



Cyprus

Mentioned in number of blog posts:	47,804
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Novosibirsk, Ufa, Perm, Samara, Chelyabinsk, Tyumen
Most discussed cities and regions:	Nicosia
Number of Instagram tags:	102,411
Top photo motives:	Beach, wedding, fortress

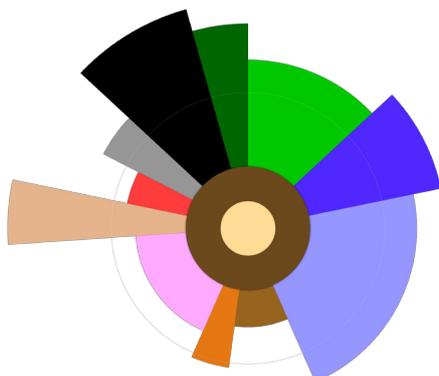
Interest profile based on Russian Internet searches:



Czech Republic

Mentioned in number of blog posts:	57,333
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Krasnodar, Novosibirsk, Samara, Chelyabinsk, Perm
Most discussed cities and regions:	Prague, Brno, Ostrava, Liberec, Olomouc
Number of Instagram tags:	69,739
Top photo motives:	Castle, beer, sausages

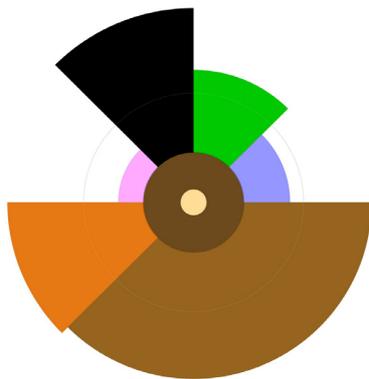
Interest profile based on Russian Internet searches:



Denmark

Mentioned in number of blog posts:	27,947
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Kazan, Ufa, Voronezh
Most discussed cities and regions:	Copenhagen, Aalborg, Odense, Aarhus
Number of Instagram tags:	11,453
Top photo motives:	City, architecture, art, street art

Interest profile based on Russian Internet searches:

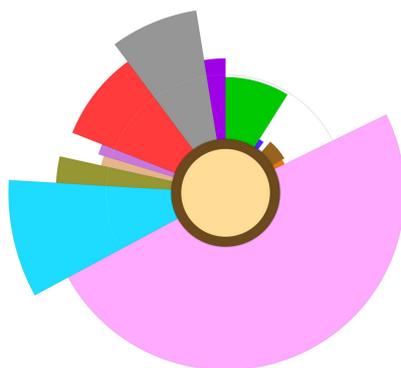


■ Accommodation	■ Nature
■ Food	■ Honeymoon
■ Transportation	■ Cruise
■ Attractions	■ Activities
■ Shopping	■ Clubbing
■ Camping	■ People
■ Culture	■ Unspecified travel
■ Recreation	■ Business and education
■ Winter holiday and skiing	■ Wellness
■ Prices and reviews	

Egypt

Mentioned in number of blog posts:	101,511
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Ufa, Voronezh, Perm, Chelyabinsk, Samara
Most discussed cities and regions:	Hurghada, Alexandria, Cairo, Giza, Dehab
Number of Instagram tags:	93,381
Top photo motives:	Pyramids, beach, swimming pool, camel, diving

Interest profile based on Russian Internet searches:

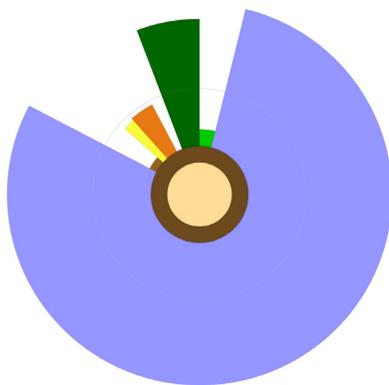


■ Accommodation	■ Nature
■ Food	■ Honeymoon
■ Transportation	■ Cruise
■ Attractions	■ Activities
■ Shopping	■ Clubbing
■ Camping	■ People
■ Culture	■ Unspecified travel
■ Recreation	■ Business and education
■ Winter holiday and skiing	■ Wellness
■ Prices and reviews	

Estonia

Mentioned in number of blog posts:	59,897
Cities showing highest interest:	St. Petersburg, Moscow, Pskov, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Veliky Novgorod, Krasnodar, Voronezh
Most discussed cities and regions:	Tallinn, Tartu
Number of Instagram tags:	27,843
Top photo motives:	City, architecture, windmill, hedgehog

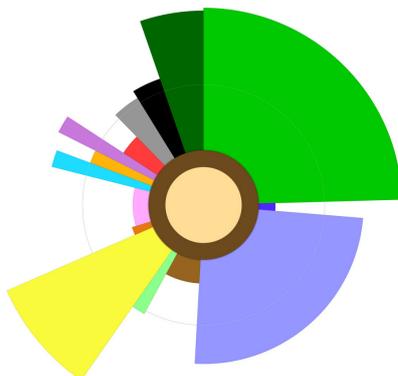
Interest profile based on Russian Internet searches:



Finland

Mentioned in number of blog posts:	75,476
Cities showing highest interest:	St. Petersburg, Moscow, Petrozavodsk, Murmansk, Nizhny Novgorod, Yekaterinburg, Veliky Novgorod, Vyborg, Rostov-on-Don, Perm
Most discussed cities and regions:	Helsinki, Turku, Lahti, Tampere, Oulu, Vantaa, Espoo
Number of Instagram tags:	46,617
Top photo motives:	Fishing, nature, elk

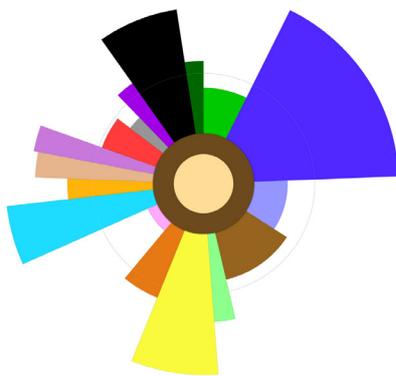
Interest profile based on Russian Internet searches:



France

Mentioned in number of blog posts:	223,040
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Voronezh, Samara, Perm
Most discussed cities and regions:	Paris, Lyon, Marseille, Nice, Bordeaux, Cannes, Rouen, Strasbourg
Number of Instagram tags:	136,079
Top photo motives:	Eiffel Tower, vine, sea, yacht, sweets

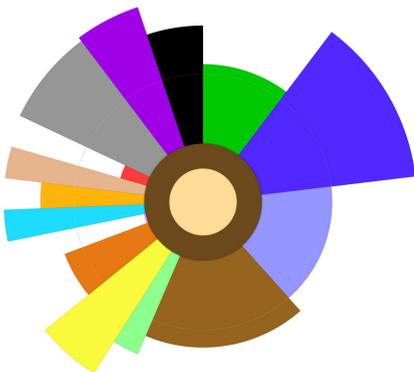
Interest profile based on Russian Internet searches:



Germany

Mentioned in number of blog posts:	572,384
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Rostov-on-Don, Nizhny Novgorod, Novosibirsk, Krasnodar, Voronezh, Chelyabinsk, Perm
Most discussed cities and regions:	Berlin, Munich, Frankfurt, Hamburg, Düsseldorf, Dresden, Cologne, Bremen
Number of Instagram tags:	136,579
Top photo motives:	Street art, city, architecture, German flag, war museum, beer

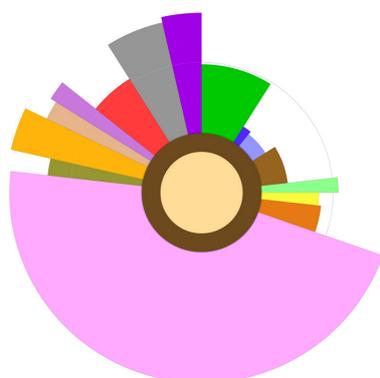
Interest profile based on Russian Internet searches:



Greece

Mentioned in number of blog posts:	111,254
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Voronezh, Samara, Novosibirsk, Perm, Krasnodar
Most discussed cities and regions:	Athens, Heraklion, Thessaloniki, Patras, Kallithea, Larissa, Piraeus
Number of Instagram tags:	159,167
Top photo motives:	Islands, sea, monastery, castle

Interest profile based on Russian Internet searches:

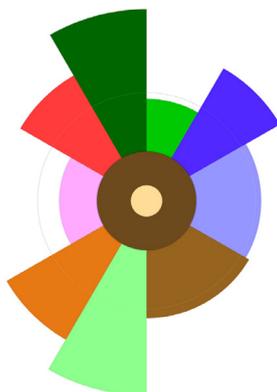


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Hungary

Mentioned in number of blog posts:	53,478
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Voronezh, Krasnodar, Samara, Ufa
Most discussed cities and regions:	Budapest, Debrecen, Miskolc
Number of Instagram tags:	22,413
Top photo motives:	City, architecture

Interest profile based on Russian Internet searches:

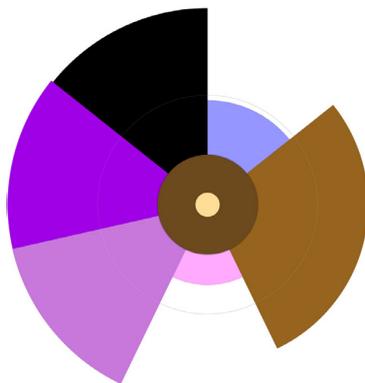


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Iceland

Mentioned in number of blog posts:	14,899
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Voronezh, Kazan, Krasnodar, Samara
Most discussed cities and regions:	Reykjavik
Number of Instagram tags:	8,386
Top photo motives:	Nature, whale, sea, volcano

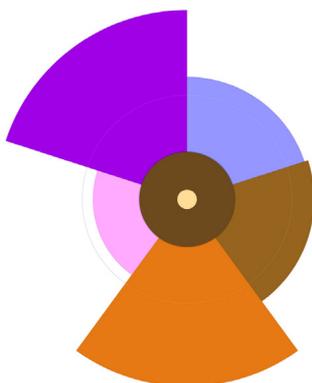
Interest profile based on Russian Internet searches:



Ireland

Mentioned in number of blog posts:	26,951
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Voronezh, Krasnoyarsk, Samara
Most discussed cities and regions:	Dublin, Cork
Number of Instagram tags:	7,768
Top photo motives:	Nature, seafood, mountain, parks, clover leaf

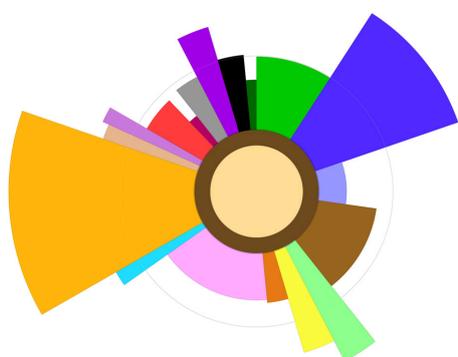
Interest profile based on Russian Internet searches:



Italy

Mentioned in number of blog posts:	198,151
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Krasnodar, Novosibirsk, Samara, Voronezh, Chelyabinsk
Most discussed cities and regions:	Rome, Milan, Venice, Catania, Verona, Florence
Number of Instagram tags:	331,274
Top photo motives:	Architecture, tiny streets, cars, pizza, ham, ice cream, vine, weddings, big brand shopping windows

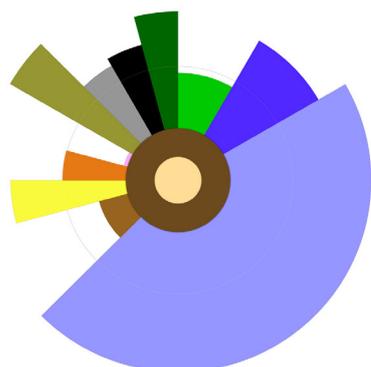
Interest profile based on Russian Internet searches:



Latvia

Mentioned in number of blog posts:	112,353
Cities showing highest interest:	Moscow, St. Petersburg, Pskov, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Kaliningrad, Voronezh, Krasnodar
Most discussed cities and regions:	Riga, Daugavpils
Number of Instagram tags:	41,460
Top photo motives:	Architecture, sport camp for the kids, sweets

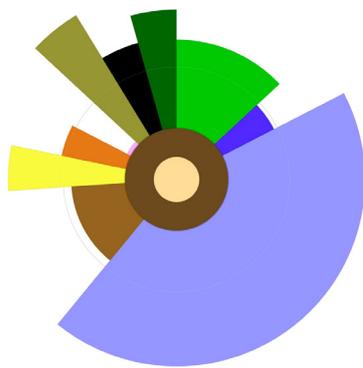
Interest profile based on Russian Internet searches:



Lithuania

Mentioned in number of blog posts:	89,653
Cities showing highest interest:	Moscow, St. Petersburg, Kaliningrad, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Voronezh, Novosibirsk, Perm, Krasnodar
Most discussed cities and regions:	Vilnius, Klaip da, Kaunas, Šiauliai, Panev žys
Number of Instagram tags:	25,313
Top photo motives:	City, architecture

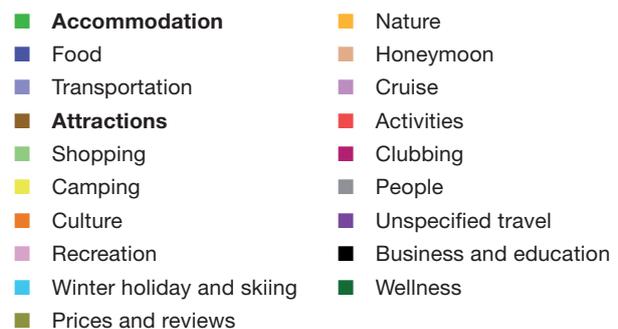
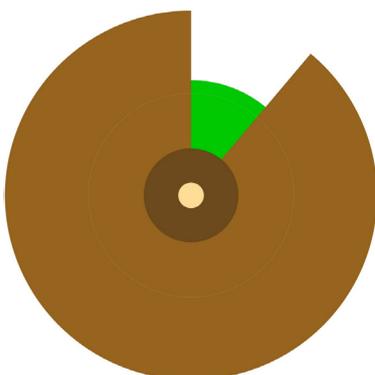
Interest profile based on Russian Internet searches:



Luxembourg

Mentioned in number of blog posts:	9,485
Cities showing highest interest:	Moscow, Yekaterinburg, St. Petersburg, Irkutsk, Kirov, Tomsk, Rostov-on-Don, Nizhny Novgorod, Orenburg, Ulyanovsk
Most discussed cities and regions:	Luxembourg
Number of Instagram tags:	150
Top photo motives:	City, architecture

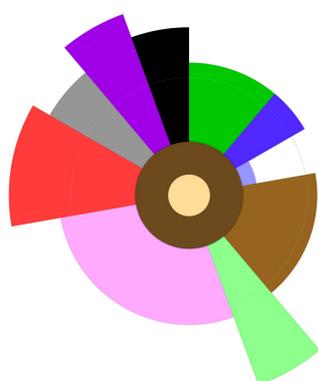
Interest profile based on Russian Internet searches:



Malta

Mentioned in number of blog posts:	9,980
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Voronezh, Novosibirsk, Krasnodar, Perm, Irkutsk
Most discussed cities and regions:	Valletta
Number of Instagram tags:	12,221
Top photo motives:	Food, vine, flowers, sea, architecture

Interest profile based on Russian Internet searches:

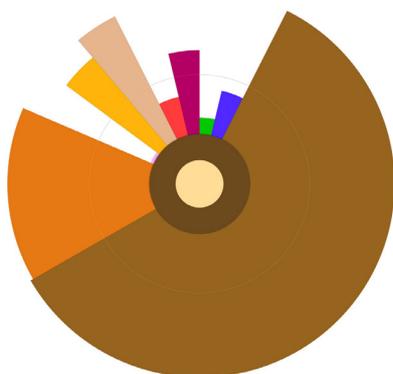


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Monaco

Mentioned in number of blog posts:	18,954
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Voronezh, Ufa, Samara
Most discussed cities and regions:	Monte Carlo
Number of Instagram tags:	16,450
Top photo motives:	Yachts, cars, dressed up people, city, hotel

Interest profile based on Russian Internet searches:

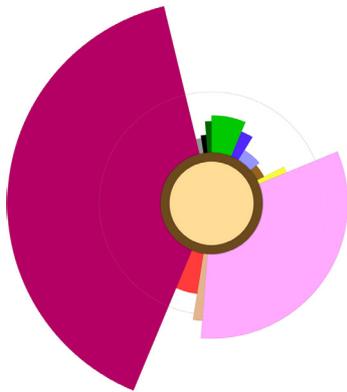


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Montenegro

Mentioned in number of blog posts:	23,674
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Perm, Samara, Yaroslavl
Most discussed cities and regions:	Podgorica
Number of Instagram tags:	54,502
Top photo motives:	Wedding, sea, nature, garden, yacht, monastery

Interest profile based on Russian Internet searches:

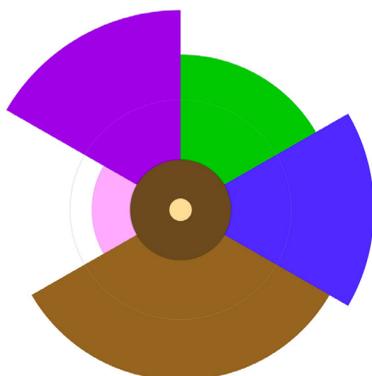


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Netherlands

Mentioned in number of blog posts:	78,667
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Samara, Kazan, Perm
Most discussed cities and regions:	Amsterdam, Den Haag, Rotterdam, Eindhoven, Leiden, Utrecht, Groningen, Maastricht
Number of Instagram tags:	50,987
Top photo motives:	Cheese, tulips, bikes, cannabis, city

Interest profile based on Russian Internet searches:

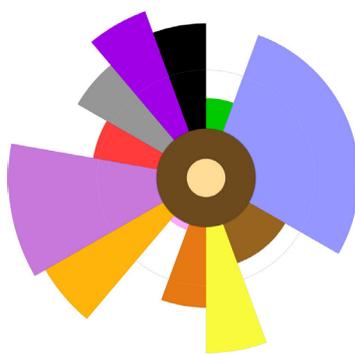


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Norway

Mentioned in number of blog posts:	50,460
Cities showing highest interest:	Moscow, St. Petersburg, Murmansk, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Arkhangelsk, Novosibirsk, Krasnodar, Perm
Most discussed cities and regions:	Oslo, Bergen, Stavanger, Trondheim, Fredrikstad
Number of Instagram tags:	22,163
Top photo motives:	Nature, mountain, sea, boat, park, roads

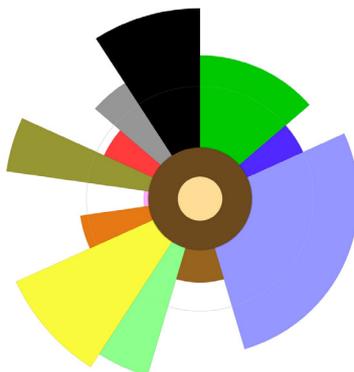
Interest profile based on Russian Internet searches:



Poland

Mentioned in number of blog posts:	142,592
Cities showing highest interest:	Moscow, Kaliningrad, St. Petersburg, Nizhny Novgorod, Yekaterinburg, Rostov-on-Don, Krasnodar, Novosibirsk, Voronezh, Chelyabinsk
Most discussed cities and regions:	Warsaw, Gdańsk, Kraków, Łódź, Wrocław, Białystok, Elbląg, Gdynia
Number of Instagram tags:	38,000
Top photo motives:	City, beer, singing

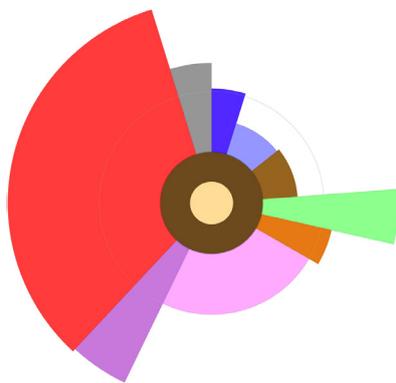
Interest profile based on Russian Internet searches:



Portugal

Mentioned in number of blog posts:	34,601
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Rostov-on-Don, Nizhny Novgorod, Novosibirsk, Krasnodar, Voronezh, Chelyabinsk, Perm
Most discussed cities and regions:	Lisbon, Porto, Braga, Coimbra
Number of Instagram tags:	29,151
Top photo motives:	Sea, surfing, vine, architecture, seafood

Interest profile based on Russian Internet searches:

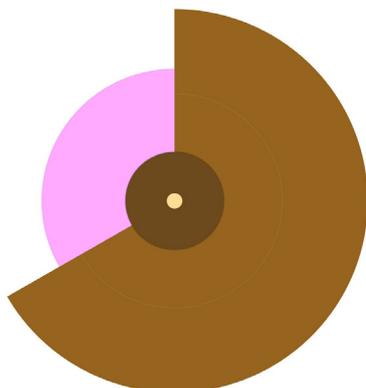


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Romania

Mentioned in number of blog posts:	29,341
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Saratov, Krasnodar, Samara
Most discussed cities and regions:	Bucharest, Constanța, Iași, Arad, Brașov, Ploiești
Number of Instagram tags:	5,000
Top photo motives:	City, nature, church

Interest profile based on Russian Internet searches:

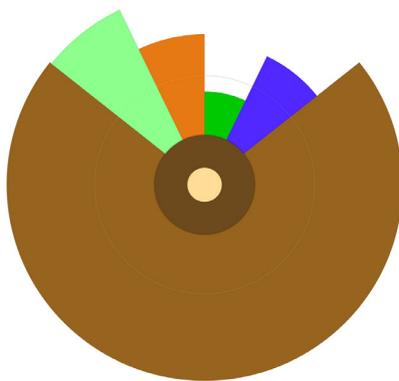


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

San Marino

Mentioned in number of blog posts:	3,176
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Krasnodar, Novosibirsk, Voronezh, Samara, Kazan
Most discussed cities and regions:	San Marino
Number of Instagram tags:	5,000
Top photo motives:	City

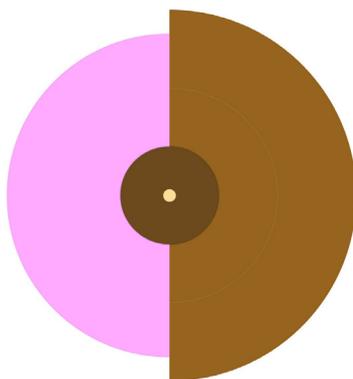
Interest profile based on Russian Internet searches:



Serbia

Mentioned in number of blog posts:	42,931
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Samara, Voronezh, Perm
Most discussed cities and regions:	Belgrade, Novi Sad
Number of Instagram tags:	11,025
Top photo motives:	Church, mountain, street art, road signs

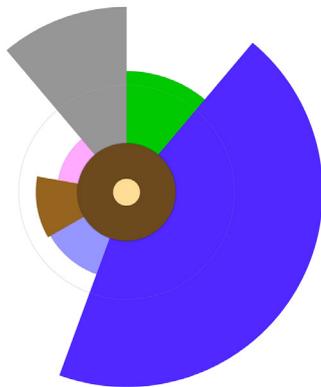
Interest profile based on Russian Internet searches:



Slovakia

Mentioned in number of blog posts:	15,934
Cities showing highest interest:	Moscow, St. Petersburg, Saratov, Nizhny Novgorod, Yekaterinburg, Kaliningrad, Rostov-on-Don, Novosibirsk, Voronezh, Krasnodar
Most discussed cities and regions:	Bratislava, Košice
Number of Instagram tags:	7,234
Top photo motives:	City, church, sunflowers, bread, soup

Interest profile based on Russian Internet searches:

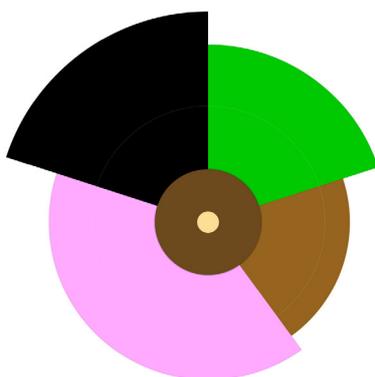


■ Accommodation	■ Nature
■ Food	■ Honeymoon
■ Transportation	■ Cruise
■ Attractions	■ Activities
■ Shopping	■ Clubbing
■ Camping	■ People
■ Culture	■ Unspecified travel
■ Recreation	■ Business and education
■ Winter holiday and skiing	■ Wellness
■ Prices and reviews	

Slovenia

Mentioned in number of blog posts:	9,765
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Kaliningrad, Rostov-on-Don, Samara, Novosibirsk, Ufa, Krasnodar
Most discussed cities and regions:	Ljubljana, Maribor
Number of Instagram tags:	5,500
Top photo motives:	City, nature

Interest profile based on Russian Internet searches:

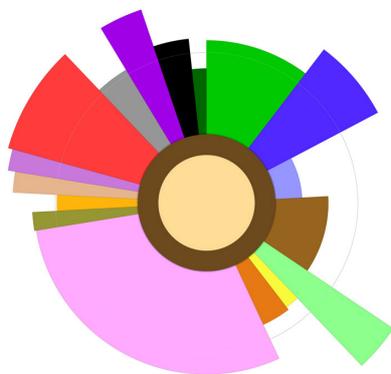


■ Accommodation	■ Nature
■ Food	■ Honeymoon
■ Transportation	■ Cruise
■ Attractions	■ Activities
■ Shopping	■ Clubbing
■ Camping	■ People
■ Culture	■ Unspecified travel
■ Recreation	■ Business and education
■ Winter holiday and skiing	■ Wellness
■ Prices and reviews	

Spain

Mentioned in number of blog posts:	148,688
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Samara, Krasnodar, Chelyabinsk, Voronezh
Most discussed cities and regions:	Barcelona, Madrid, Valencia, Málaga, Palma de Mallorca, Grenade, Seville, Marbella
Number of Instagram tags:	213,250
Top photo motives:	Art, seafood, ham, architecture, beach, football

Interest profile based on Russian Internet searches:

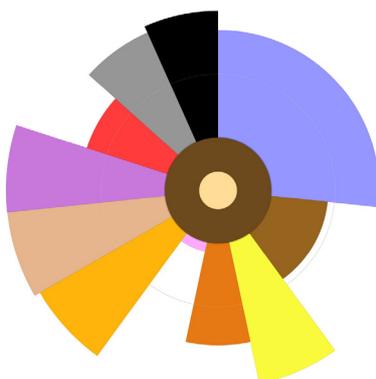


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Sweden

Mentioned in number of blog posts:	55,538
Cities showing highest interest:	Moscow, St. Petersburg, Nizhny Novgorod, Yekaterinburg, Rostov-on-Don, Novosibirsk, Kazan, Krasnodar, Samara, Saratov
Most discussed cities and regions:	Stockholm, Malmö, Gothenburg, Uppsala
Number of Instagram tags:	35,934
Top photo motives:	Beer, Ikea, city

Interest profile based on Russian Internet searches:

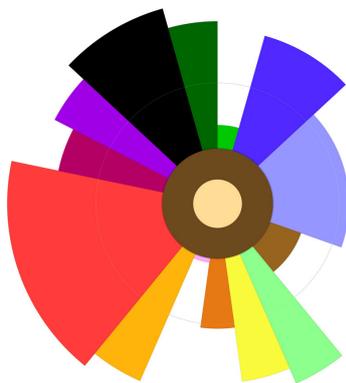


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Switzerland

Mentioned in number of blog posts:	73,022
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Novosibirsk, Krasnodar, Voronezh, Ufa, Samara
Most discussed cities and regions:	Zurich, Bern, Geneva, Lucerne, Basel, Lausanne
Number of Instagram tags:	32,833
Top photo motives:	Alps, chocolate, field, architecture

Interest profile based on Russian Internet searches:

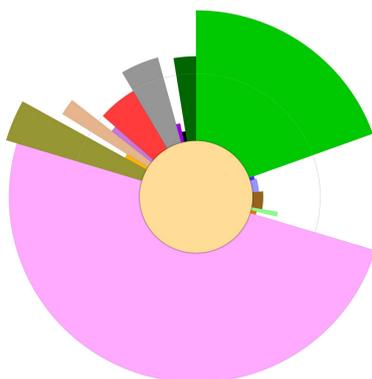


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Turkey

Mentioned in number of blog posts:	159,722
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Ufa, Novosibirsk, Perm, Kazan, Samara
Most discussed cities and regions:	Antalya, Istanbul, Izmir, Ankara, Bursa, Adana, Konya
Number of Instagram tags:	247,012
Top photo motives:	Beach, swimming pool, coffee, mosque

Interest profile based on Russian Internet searches:

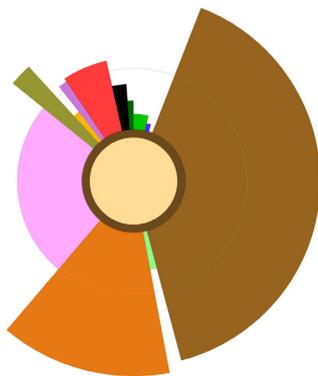


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

United Arab Emirates

Mentioned in number of blog posts:	19,155
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Ufa, Kazan, Samara, Chelyabinsk, Novosibirsk
Most discussed cities and regions:	Dubai, Abu Dhabi, Sharjah, Fujairah, Ras al-Khaimah
Number of Instagram tags:	73,986
Top photo motives:	Burj Al Arab, sand dunes, camel, beach

Interest profile based on Russian Internet searches:

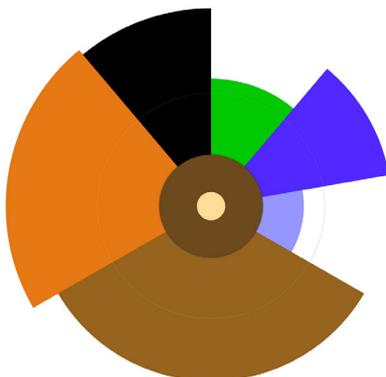


Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

United Kingdom

Mentioned in number of blog posts:	126,074
Cities showing highest interest:	Moscow, St. Petersburg, Yekaterinburg, Nizhny Novgorod, Rostov-on-Don, Ufa, Novosibirsk, Perm, Krasnodar, Voronezh
Most discussed cities and regions:	London, Manchester, Liverpool, Bristol, Oxford, Cambridge, Crawley, Edinburgh
Number of Instagram tags:	103,009
Top photo motives:	Big Ben, London Eye, British flag, telephone booth, city, football

Interest profile based on Russian Internet searches:



Accommodation	Nature
Food	Honeymoon
Transportation	Cruise
Attractions	Activities
Shopping	Clubbing
Camping	People
Culture	Unspecified travel
Recreation	Business and education
Winter holiday and skiing	Wellness
Prices and reviews	

Annex II

Methodological approach

Benefiting from the relatively new body of information that online, user-generated travel information in the Russian social media sphere constitutes, this study takes a bottom-up approach to travel insights, starting with individual observations and working up to the overall picture. This is useful because travellers are often not aware when they are a part of a phenomenon, trend or tribe.

What this means in practice is the collection and analysis of information across the digital platforms on which Russian travellers are active: blogs, microblogs, photoblogs, online forums, social networks and search engines. Two complementary methods were combined:

Quantitative analysis of online information:

which was specifically applied to posts from blogs, microblogs, and online forums, as well as Internet search data from the two big search engines, Yandex and Google.

In total 55,000 blog and microblog posts and 560,000 forum posts were analysed.

In the case of social media, the object of study was *Russian-speaking travellers*, but an effort was made to filter out non-Russian content.

In the case of Internet search analysis, the object of study was *Russian travellers*, as in this case geographical limitation was possible.



Qualitative netnography:

through which social media posts and photos were *studied in-depth*, looking for *status markers, icons, artefacts, and tribes* – concepts from ethnography that have proven useful in understanding the motivations and decisions of travellers.

A benefit of this method is that it enables the structured study of sources that are difficult for computers to access or analyse, such as shared photos.

The quantitative methods make use of the “big data” of the Russian online travel information universe, while the qualitative methods drill down into its “thick data”, where depth and density of information is more important than the size of the dataset. While big data provides the landscape and indicates where to “zoom in”, thick data gives a deep understanding of a phenomenon. By iterating between the two methods, an image of Russian travellers emerges.

The precise procedure was as follows:

1. Data was downloaded from relevant platforms and purchased from suppliers of social media data;
2. Broad keywords were used to narrow down the conversation. Such keywords included “travel” and various travel-related keywords, as well as “Europe” and various European destinations. All text analysis was done in Russian; translation was only done in the final step to avoid influencing the results;
3. Noise in the data was reduced by filtering out posts that matched irrelevance criteria;

4. Statistical analysis was performed on the data to cluster words into topics and topics into themes; to identify geographical patterns; to detect changes over time; and to separate travellers into groups. Text data was used to understand travel discussion in an open-ended fashion, while search engine data was used to quantify travellers' interest in specific, pre-defined topics;
5. The most relevant or interesting topics, themes, groups and other patterns were subjected to in-depth, qualitative study with the reading of individual posts. To add perspective, additional sources such as photoblogs were studied qualitatively and clustered manually. Conclusions were illustrated with relevant quotations and photographs;
6. Insights from the quantitative study were contextualized and described using observations and nuances from the qualitative study. The qualitative study also led to the formulation of hypotheses that were tested using the quantitative approach; and
7. Insights were described using observations, example quotations and quantitative outcomes of the analysis.

The main period of study was January 2013 to June 2014. In order to isolate the impact of the Ukraine crisis and study it separately, only data before the crisis was used for the general analysis. Data after the crisis was used to study the crisis specifically. In order to study the change of topics over time, data from 2012 was added to the analysis.



The **World Tourism Organization** (UNWTO), a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 156 countries, 6 territories, 2 permanent observers and over 400 Affiliate Members.



Founded in 1948, the **European Travel Commission** (ETC) is a non-profit organization whose role is to market and promote Europe as a tourism destination in overseas markets. ETC's members are the national tourism organizations of 33 European countries. Its mission is to provide added value to members by encouraging exchange of information and management expertise and promoting awareness about the role played by the national tourism organizations.

