ACTION
TRAVEL

ATOR

changes in Russian tourist consumer behaviour during the covid-19 pandemic.

study period: january 15 – march 31, 2021

subject of analysis:
- Current sales in the segment of outbound tourism
- Tour sales for the spring-summer season 2021, including the early booking offers

destinations:
- Turkey, UAE, Tanzania, Maldives, Cuba, Serbia (due to travel restrictions associated with the COVID-19 pandemic, the study considered only sales results to the destinations indicated)

study respondents:
- Heads of leading tour operator companies, generating over 80% of organized tourist flow for the destinations in question
- Representatives of travel agencies, uniting over 100 retail sales offices of tourist packages and collaborating with 115 tour operators

core findings

- Up to an estimated 40% of all summer 2021 bookings are tours that were postponed in 2020
- "Blurring" of the seasonality concept for destination demand: demand for the Maldives, Cuba, the UAE and Tanzania will remain even in the summer season
- The booking window for even the short turnaround tours decreased by 2 times on average and is now no more than 3 weeks long

- In the first quarter of 2021, about 70-80% of all bookings were short turnaround tours
- Low interest in early booking offer sales withthe booking window being 60 days on average
- Turkey – the most popular early booking destination in 2021
- According to forecasts, early booking program sales figures are not expected to return to levels seen in 2018-2020, before 2023

Changes in tourist preferences when considering early booking package tour offers:
- They pay closer attention to the terms and conditions of the offer
- They consider the size of the initial payment and the tour payment plan
- They choose offers with the most lenient terms (no prepayments, full payment as close as possible to the arrival dates, etc.)

key stats

TICKET
9-12 nights is the average duration of the tour

+ 40% increase in the share of bookings with 4* and 5* accommodations

40% of tourists prefer to reduce travel in favor of a more comfortable stay

practically no last-minute deals on the market

- 60% decrease in the number of elderly tourists (55+)

+ 5% increase in the share of families with children

30-50 the average age of consumers of the outbound tourism product in 2021

10% - 40% increase in the demand for trip cancellation insurance

cost analysis

There has been an increase in the package tour cost to most of the surveyed destinations, the only exception being Tanzania (10-15% decrease compared to 2019).

+10%	Turkey
+10%	Cuba
+20%	Serbia
+30%	Maldives
+90%	UAE

The change in cost is associated with the price of air travel, the volume of air transportation and the availability of charter programs.

The cost of ground handling has changed insignificantly or hasn't changed at all.

There are no last-minute deals on the market.

Supply and demand are either balanced, or demand exceeds supply.

Italy, Greece, Spain, Dominican Republic, Thailand, Vietnam and sea cruises were named among the currently unavailable (due to the pandemic) destinations with the most loyal audience.

other factors impacting russian tourist preferences

limiting factors

- Requirement of PCR tests on arrival, especially if paid
- Mandatory quarantine in the country of temporary stay
- Fear of another outbreak of the disease both in Russia and in the destination country
- Changes in entry requirements and unclear money return policies
- Significant rise in the price of the tour

secondary factors

- The requirement to present PCR test results on arrival does not significantly impact tour purchases
- Compulsory mask requirement, shutdown of the buffet concept and the "new reality" hotel restaurant rules do not significanlty affect tourists' decisions to travel

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