

# Market Presentation - Russia

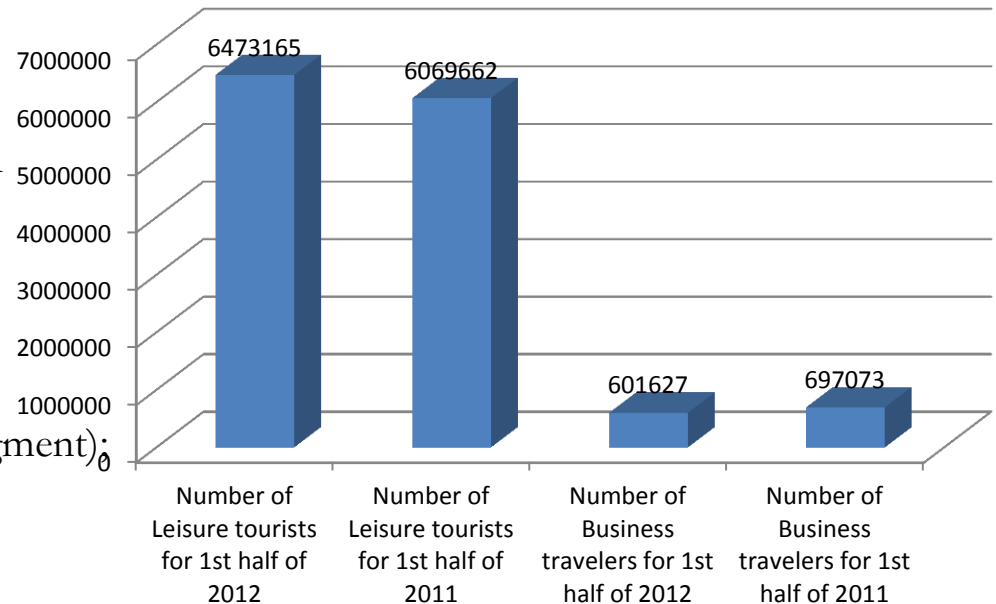


# Data for Leisure segment

There are 4286 officially registered tour operators  
38 TO with bank guarantee of 2.5 mil EUR (among them 4 from Russian regions).

Russian TO market might be divided into:

- Classic/Mass TO;
- Multi-destination TO;
- Individual TO (operating in upscale segment);
- Luxury and Concierge agencies.



TOP Arrival periods: January 1<sup>st</sup> – 10<sup>th</sup>; 2<sup>nd</sup> part of March (School Holidays), May 1<sup>st</sup> – 10<sup>th</sup>, June, 2<sup>nd</sup> part of October

## Philippines competitors:

1. Thailand – 552.915 (1<sup>st</sup> half of 2012 and increase by 12% to 2011)
2. South Korea – 87.933 (1<sup>st</sup> half of 2012 and increase by 13% to 2011)
3. Japan – 34.750 (1<sup>st</sup> half of 2012 and increase by 4% to 2011)

# Data for Leisure segment

- Key Areas for development of Philippines as destination:  
**MOSCOW & ST. PETERSBURG** (over 55% of whole tourism flow)



Mostly travel by:

**Cathay Pacific** – HKG

**Qatar Airways** – Doha

**Emirates** – Dubai (from  
Moscow and St. Petersburg)

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# Data for Leisure segment

- Key Areas for development of Philippines as destination:  
**URAL Region & SIBERIA** (represent 15% of whole tourism flow)



Mostly travel by:  
**S7** – HKG (from Novosibirsk)  
**Ural Airlines** – Dubai (from Ekaterinburg)

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# Data for Leisure segment

- Key Areas for development of Philippines as destination:  
**FAR EAST** (represent 30% of whole tourism flow)



Mostly travel by:

**S7** – HKG (from Vladivostok and Khabarovsk)

**Korean Air** – Seoul (from Vladivostok)

**Asiana** – Seoul (from Khabarovsk and Yuzhno-Sakhalinsk)

Vladivostok Avia – Seoul (from Vladivostok)

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# Market Trends

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- Russia is №4 among TOP5 most dynamic countries for outbound tourism with 21% growth in 2011 (Brazil – 44%; India – 33%; China – 30%);
- 20% travelers book vacation two weeks prior to arrival;
- Foreign airlines continue to look for business to and from Moscow as well as other Russian regions (Ekaterinburg, Rostov, Samara, Vladivostok).
- According to travel.ru when planning a trip, tourist visits in average nine websites and spends about 1 hour 43 minutes before deciding to make online reservation;
- Due to strong market competition, Russian middle class starts to travel more intensively (approx. 3 times a year) and prefer to stay at 4 deluxe or 5 star properties, same time they're special offer driven;
- For winter holidays more than 50% of tourists prefer beach-related rest, while 15% choose skiing;
- Increase of return customers to the same destination;
- Increase average duration of beach holidays to minimum 10-14 days.

# Customer Profile

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## **Russian traveler to Philippines:**

- 60% - family, 25% - divers, 10% - honeymoon;
- in 80% women takes decision on destination for vacation;
- Book 3-4 weeks in advance;
- Prefer all-inclusive package;
- Stay at 4 Deluxe or 5 star hotel;
- Doesn't speak English and choose hotels with Russian speaking staff;
- Doesn't use credit cards and prefer cash deposits, as well as payments in cash;
- Looking for combination of beach and entertainment, especially closer location of bars and restaurants;
- Average daily expenses at 5 star hotel is around 100-150 USD;

# TO Profile

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## **Russian TO to Philippines:**

- Mostly individual TO, which doesn't have mass destinations;
- 60-70% of their business – TA and 30-40% - direct customers;
- Main source of distribution: web-site and mailing;
- produce brochure only once per year;
- Work via Receptive TO;
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## 2012 Results in figures

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- 16 TO added Philippines as destination to web-sites and brochures (during July-October);
- 2 TO took block of seats from Moscow to Manila by Cathay Pacific and Qatar Airways;
- 4 Presentations/training done with Russian TO for its TA network;
- Biletour from Vlavostok is planning launch direct weekly flights to Manila (TBA) by S7 Airlines;
- 1 Roadshow held in Far East with over 260 visitors;
- Launching event with Millenium Voyage, including support with production of Philippines brochure;
- **Philippines Movie Week** at Dome Cinema and Bar (September 20<sup>th</sup> – 23<sup>rd</sup>).  
Figures: Over 670 visitors. Over 130 brochures distributed.  
8 movies showed, which filmed in Philippines  
DOT investment: none

# Actions 2013 - Russia



# Actions for 2013

## Marketing initiative – TRADE

Launching of first Travel trade Manual in Russian – 12.000 copies



**It's more fun in the Philippines**

**ISLANDS**

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# Actions for 2013

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## Marketing initiative – Direct Market

Philippines Food and Drink Campaign in Moscow  
Participants: Maxim Bar and Best FM (100, 5FM)  
Duration: 3 weeks



**BEST FM**  
**100.5**

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## Other Actions for 2013

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- **Roadshow** in Ekaterinburg and Novosibirsk, Russia (TBA);
- Radio Maximum **Radio Campaign** for 2 weeks (including visiting DJ to Philippines and post campaign) (February);
- Philippines **Art Festival** in Moscow at VinZavod (Wine Hactory)  
During same dates, as in Manila (February 7<sup>th</sup> – 10<sup>th</sup>)
- Voyage Magazine & Coffemania & DOT Join **Marketing Campaign** (February);
- Launching Digital **web-site** in Russian ([www.fun-philippines.ru](http://www.fun-philippines.ru)) (March);
- **Roadshow** in Moscow, Russia and Kiev, Ukraine (September 2013);
- **Philippines Days** at Stockmann (October). Duration: 1 month;