

Russia Tourism Report Q2 2016

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Abstracts

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BMI View: We are currently forecasting a tentative return to growth in Russia's tourism industry in 2016. Arrivals are expected to recover well from a slump in 2015 as the weaker rouble attracts more visitors from Europe and, increasingly, Asia Pacific markets. Despite this growth, however, challenges remain including the subdued economic picture, where falling oil revenues, weak investment growth and a decline in real incomes will impact not only upon public investment in necessary transport and accommodation improvements but also upon the large domestic travel market. The outlook brightens however, in light of Russia's hosting of major sporting events and ongoing improvements in accessibility and connectivity, though we note that this growth is to some extent dependent upon an improvement in regional relations. **Key Updates And Forecasts:** ? Russia's international arrivals market is expected to return to growth in 2016, with the number of visitors forecast to increase by 7.4% to around 31.5mn, compensating for a sharp drop in arrivals in 2015. The bulk of arrivals continue to arrive from Russia's European neighbours while arrivals from Asia to the east are also a key growing market.

While arrivals are growing, the outlook for tourism related expenditure is subdued, with declines expected following the weakening of the rouble and the impact of widespread economic sanctions on Russia.

International flight connections are still expanding, despite the downturn in travel in 2015. At Pulkovo International Airport (St Petersburg), 10 additional new airlines launched flights in 2015 and 11 domestic and 8 international destinations were added to the roster. Passenger numbers were down by 5.4% in 2015 (to 13.5mn) however figures are expected to recover over 2016.

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