



Short version report of phases III and IV of the Marketing research “Tourist profile”

Stage III

Face to face and internet surveys with tourists who have visited and to plan to visit St. Petersburg, Leningrad region and Saimaa region

1,332 respondents

Tourist profile

Refer to ANNEX 1

Information sources

The key source of information about the region is the Internet (except for social networks, which are in third place in this rating in popularity) and in particular by review portals. About a quarter of the respondents (28%) call their level of awareness about the region low. Only every sixth (17.3%) considers it high, which demonstrates the need to intensify work in this direction. Annex 2

Interest

The main purpose of the trip is to visit historical and cultural attractions in second place is the desire to have fun, take a break from routine. For more than half of the respondents, combined tours (with the possibility of visiting in the course of one trip both the territory of St. Petersburg (Leningrad region) and Saimaa (Finland) would be of interest, about 31% are not interested in them. Estonia, Belarus, Israel, Mexico, Denmark, USA, Brazil, Australia, Great Britain, South Africa, Sweden and the Netherlands Citizens of Germany, India and Poland are less interested in combined tours.

More than 5% want to visit during their current trip, in addition to St. Petersburg, another part of the region (Leningrad region or Saimaa). The main obstacle for the respondents is the visa regime.

About the priorities when choosing a destination for travel in general: in the first place, with a significant margin, is the wealth of cultural and historical attractions, affordability, on the third - transport accessibility. The quality of hotel services will be the determining factor for every fourth respondent (22.6%), and the rest of the factors have less weight in decision-making.

Season

Summer is the most preferred time of year to travel to the region, in second place is winter tourism.

Logistic and duration

The most popular entry point to the region is St. Petersburg.

St. Petersburg was most often the starting point when entering the region, then Helsinki, Vyborg and Moscow. In terms of transport, the audience does not have unambiguous preferences - they traveled around the region

by bus, train, car, plane, other options (for example, cruise ships) were named by a significantly smaller number of respondents. Plane is the transport with a significant advantage, cruise ships are in second place.

The duration of a trip to the region in more than half of the cases (53.2%) varies within 3-6 days, and every fourth trip generally takes 1-2 days. Only about 20% of trips to the region last a week or more.

The duration of the trip in half of the cases (53.8%) ranged from 3 days to 1 week, in 20% of cases - 1-2 days.

Plan the trip:

The vast majority of respondents booked a trip through a travel agency, 15.4% - through online booking.

Preferable types of accommodation are;

1. hotel
2. renting apartments
3. staying with friends or relatives
4. SPA center, cottage / villa, etc

Associations

Tsar and the Romanov dynasty in relation to St. Petersburg and Leningrad Region. At the same time, it can be noted that the associative array in relation to St. Petersburg and the Leningrad region is associated primarily with the historical and cultural objects of St. Petersburg (Nevsky Prospect, Peter and Paul Fortress, palaces, castles, etc.) and practically does not include objects of the Leningrad regions, **and** in relation to Saimaa, tourists indicate almost exclusively nature-oriented associations (lakes, forests, fishing, etc). The low awareness of the respondents about the region is evidenced by the stereotypical nature of the answers to the question about the objects of greatest interest to them. In relation to St. Petersburg and the Leningrad Region, this rating is led by such objects as the Hermitage and Peterhof. With regard to the Saimaa region, the situation is completely deplorable: over 90% of respondents found it difficult to answer the question, and only such objects as the Saimaa Canal, lakes and shopping.

Barriers to travel to region:

Among the factors that can impede travel to the region, in the first place is the problem of obtaining a visa, at the same time, $\frac{3}{4}$ of those who mentioned this factor note that with the introduction of electronic visas, it has become easier to cross the border. In second place are purely economic reasons (the lack of money was mentioned by 15.6% of the respondents), each of the other reasons - family circumstances, laziness, work, etc. named 7% or less.

Project target groups:

Recall that at stage 2 of the project implementation, it was concluded that the following groups of countries have the highest potential in terms of tourism:

- 1) Israel, Hong Kong, South Korea (they have a visa-free regime with both Finland and Russia); South Korea, in addition, is among the leaders in terms of incoming tourist flow to the region.
- 2) Germany, Estonia, France, Italy (are among the top leaders in entering the region, and also have a visa-free regime with Finland and a simplified procedure for issuing Russian visas),
- 3) China (has a visa-free regime with Russia, is among the top leaders in terms of entry to the region).

4) Austria, Belgium, Great Britain, Denmark, Spain, Canada, Netherlands, Norway, Poland, Taiwan, Ukraine, Switzerland, Sweden, Japan - are among the leaders in the tourist flow, have a visa-free regime with Finland and a simplified procedure for issuing visas to Russia ...

The results of the survey conducted at stage 3 revealed the need to include the state of Latin America (Brazil, Mexico) in the list of countries of the general population. The potential demand for the combined product from the Latin American and US markets is most likely driven by the high cost of air travel from these regions and the desire to get the most out of one relatively expensive trip. ANNEX 4

Alternative

- assortment of historical and cultural attractions
- affordability
- transport accessibility
- quality of hotel services
- assortment of cultural events
- security questions
- completeness of information
- mild climate

INTERNET SURVEY

Three quarters of the respondents have traveled to the region; every fifth has no such experience, but would like to find it. More than a third of the respondents had a chance to travel to the region times or more. Three quarters of the respondents named visiting cultural sites as a key goal of their last trip. Much less traveled for the sake of the beauty of nature, every third - on work matters. The overwhelming majority of the respondents would be interested in combined tours with the possibility of visiting in the course of one trip both the territory of the North-West of Russia and the territory of Saimaa (Finland).

Answers only for those planning a trip to the region

Among those respondents who are just planning to visit the region, there are no those who would not like to visit St. Petersburg as part of this trip. In second place is Savonlinna (72.7%), in third - Mikkeli (63.6%), followed by Lappeenranta (54.5%), Imatra (46.4%) and Vyborg (36.4%). The answers to the question about the purpose of the trip are generally similar to those of those who have already visited the region - three-quarters would like to come here for cultural and historical attractions, two-thirds - for the beauty of nature, and the same amount - for the opportunity to visit within one trip two countries at once. Three quarters of the respondents plan to start exploring the region from St. Petersburg.

PROFESSIONALS INTERVIEWS

Countries with the most tourists visiting the region in 2019

China, Latin America, United States, since they occupy a leading position in the field of cruise tourism Australia, South America, Germany, France, Italy, Spanish-speaking countries", the British through Estonia to Saint Petersburg, Baltics, Finland, German-speaking, Australia and Russia, Estonians, Italians, Americans in the summer.

A number of local industry experts, for example, hoteliers from the Finnish side, argue that there are very few tourists from third countries, and the tourist flow to Saimaa is mainly represented by guests from Russia.

Holidays factor

Despite the fact that a number of experts say that, if you wish, you can "stretch" the tourist season in the region for the whole year the main part of the industry experts still claims that the weather and climatic conditions of the region cannot be ignored, and the boundaries of the tourist season in the Leningrad Region and St. Petersburg are clearly defined within May- September. While for tourists coming to the region from neighboring countries (the Baltic States, Germany), as well as neighboring regions of Russia and Finland, weekends and holidays can be a kind of landmark due to the short duration of the tours (within a few days), tourists from distant countries (Southeast Asia) make much longer trips (up to three weeks) and, therefore, for them the link to weekends or holidays no longer plays a decisive role. A number of experts note the strengthening of the binding to weekends and holidays in connection with the introduction of electronic visas and the simplification of entry into the region. Tourists focusing on daily cottage rentals are more likely to tie the tour to weekends or holidays.

Points of attraction. Strengths of the project

The region is very interesting, ecologically clean and there are many collective accommodation facilities built there. Lake Saimaa is for fishing and active types of tourism, Savonlinna is very interesting - its fortress and the music festivals.

Savonlinna Opera Festival, Imatra, Ivangorod, Espoo, Vyborg, Okhta Park, Baltic Sea islands, Saimaa Canal, Golf-courses in Finland, Climatic conditions in Finland, the possibility of rural and ecotourism in the Leningrad region, Brand "Russian Winter, fishing and outdoor recreation in Finland. A number of experts propose, taking into account a significant range of points of attraction, to create a diversified tourist product under the brands of the "first magnitude" and under the brands of the "second magnitude". Brands of the first magnitude are certainly all the same in St. Petersburg (Hermitage, Tsarskoe Selo, Peterhof), but brands of the second magnitude – there will already be specificity for a specific proposal, focused on a certain target audience by age, some there, right here Everyone will come first of all to see imperial St. Petersburg, but in the quality of, as it were, the second echelon they will have differences. Someone, perhaps, will go to the Hermitage for 4 days in a row, while someone will go, say, to the region, to nature and further, to Finland. You just need to position correctly and not create a conflict between second-tier brands and first-tier brands

Competitive locations

Karelia, other parts of Finland (Lapland, Helsinki), Estonia, Stockholm

Infrastructure problems, other growth points

None of the experts have any complaints about the tourist infrastructure (including transport) in Finland, the situation is almost the same in St. Petersburg, the level of infrastructure development in the Leningrad region is assessed by experts as low even for it's functioning as a "transit", "transshipment" center. Even in Vyborg, as hub of the direction on the Russian side, everything, according to the estimates of the majority, with rare exceptions, experts, is deplorable, and the hotel fund is clearly insufficient. Experts, in particular, note such obstacles for the project in the field of infrastructure and not only as:

- bad situation with border crossing, long queues
- problems in the field of visa legislation (the situation with Allegro),
- mentality (there is a familiar tourist route Petersburg-Moscow, why something new?)
- the diverse nature of the elements (St. Petersburg is the "cultural capital", while Saimaa is a place for solitude and admiring nature). Although some experts, on the contrary, present this moment as a plus, it all depends on how it will be presented to consumers.
- persistent fear of Russia and Russians
- lack of "points of attraction", and not only on the Russian side.
- the entertainment and leisure industry in St. Petersburg is poorly developed, which is important for young people

- underdeveloped infrastructure on the Russian side (bicycle, yacht, roadside, camper hotel infrastructure (and service) in the Leningrad Region, hotel industry and service in St. Petersburg)
- the need to expand the Saimaa Canal
- the need to improve the Leningrad Region as a whole
- insufficient number of direct flights to St. Petersburg
- insufficient quantity and quality of MICE objects in St. Petersburg
- underdevelopment of the event industry in Vyborg
- the need to develop the icebreaker fleet to expand the seasonality and increase the attendance of the St. Petersburg forts
- insufficiently high level of development of entertainment infrastructure on the territory of the Saimaa
- lack of close interaction between the hotel and restaurant business in Finland

Possible role of the Leningrad region

- As a “transit and transshipment”
- as a contrast to the well-equipped Finnish side can act not only as a transshipment point, because we have Vyborg and Priozersk, such border towns where the fortress has its own definite one, and you can walk a little to show from the point of view of historical heritage - this is a fortress and places of absolutely different eras, and now work is underway there to restore estates of different, and this can be shown, this is not the case in other regions.
- historical stratum, Finno-Karelian, pre-war, pre-revolutionary, Karelian Isthmus
- historical filling – historical estates.

Key consumers

Despite the fact that a number of experts say that it is possible to create a "mythology" that attracts tourists of all social strata to the region (as an example, the fashion for Chinese citizens to visit the Murmansk during the northern lights period), the key segment is middle-aged and above tourists (more focused on outdoor recreation than young people, which is important due to the presence of Finland in the bundle) with an average income and above (which will ensure a longer tour duration). The special value and accessibility of the project for Russian tourists, due to the geographical location of the region, is also emphasized.

Types: family groups, client with earnings of 60 thousand and more, there is no bottom line for income, close to border determines that, in the opinion of many experts, the project will be interesting for the residents of Russia

About the tour format

- the nature of the tour (including the nature-oriented region of Saimaa) still implies the development of individual tours rather than group ones.
- according to the majority of experts, the target audience here is tourists who come to St. Petersburg not for the first time, which is a cultural monument of world importance. Most of those who go to the region for the first time will not want to "diffuse attention". And this is the problem - according to the experience of most experts, there are few "repeat" tourists in St. Petersburg.
- the growing popularity of individual tours is noted: “It is the individual tours that are growing now. People are moving away from groups more and more. They take audio guides, take a personal guide, travel themselves, download applications. The number of travelers outside the group is slowly increasing. Since these are mainly young people - young people travel more and more, young people love freedom. They are more mobile, they prefer to travel separately and without groups

- a ready-made package - the target audience is elderly people with grandchildren: "That is, some kind of opportunity for a person to come to the office and buy himself a full accommodation, flight and cultural program. It should be elderly people with grandchildren, because ecological tourism and a cultural program - this definitely fits in exactly what a grandfather and grandmother should give to their grandson, bring him healthy and full of cultural values.

Tour direction

- On the one hand, St. Petersburg could be "the cherry on the cake" at the end of the tour, on the other hand, after visiting St. Petersburg, you can offer people a quiet outdoor recreation. Entering and leaving the region from this point, which is associated with a double passage of the state border with all the ensuing difficulties.
- Finnish side as an entry point, then it will depend on which entry point for the flight will be cheaper, because then the price of the tour is immediately determined by this (Vanta is much cheaper than Pulkovo, because as far as I know from the owners of our VVSS - the air gates of the northern capital from the management, we actually have four times higher rate of aircraft maintenance than at other neighboring airports countries.
- departure point should be the Finnish side, there are a lot of low-cost airlines here and Helsinki is a huge transport hub. And also Lappeenranta, there is such an active air traffic in the last few years.
- an entry point should be St. Petersburg, St. Petersburg can be conditionally for a certain consumer of tourist services a transit point through the Pulkovo airport, but if the end point is ecotourism, or some kind of tourism with a natural bias, then it is unlikely a person will stay in St. Petersburg in order to enjoy museums, theaters or something. If a person comes to St. Petersburg as a participant in some event, event tourism develops, or for educational, excursion purposes, then he is unlikely to go to the Leningrad region and he is unlikely to go to Finland. "
- a number of experts say that both options have a right to exist

Transport

The most promising transport for traveling around the region is personal cars and bus transport, few people talk about railway. Some experts suggested the development of biker and auto camping infrastructure. Water transport is not very promising due to the almost complete absence of yacht infrastructure on the Russian side (and even if there was such a thing, the climatic conditions in the region do not imply long-term navigation). A number of experts point out the need to expand the railway communication between the two countries.

Combined tour duration

Most experts see the optimal duration of the tour for representatives of third countries in the region at least 5-7 days (at least a couple of it - in St. Petersburg, a couple more days - Finland plus the border, transit).

- **Long duration of tours from Asia, Australia, America:** "If tourists fly from Australia, they have a trip of at least 20 days"
- **For tourists from Europe, there may be various options:** "A week is the maximum. Either a very large, long product - 10-12 days, or 6 days, 7 nights, or generally 5 nights, 6 days. But, again, there are fans who are energetic, fast. Therefore, the Thursday-Sunday format also takes place. Because if someone has a vacation. They ate to simulate the situation, someone has a vacation for a week, then it will be Monday-Wednesday - you do household chores, and Thursday- Sunday is just a long weekend, not one night. It seems to me that this can also be a popular product"
- A person who travels for a long time - for a month, for 2-3 weeks, with such luxury in time, he can somehow be pulled both there and there"

Sources of information

Experts say that it is necessary to use equally the communication channels inherent in b2b and b2c in equal measure

Tourist costs of travel to the region:

The question of costs caused the most difficulties - there are a lot of variables (season, hotel level, level of customer requests, city of the region), however, on average, experts estimate costs at 4,000-5,000 rubles per day for a tourist coming to

St. Petersburg

Opinions on the overall feasibility of the project

It is promising, but promising only in connection with specific tourism products". On this issue, the opinions of experts were expectedly divided, but the main part of the experts believes that "everything is possible" in the presence of a well-built marketing, with a well-built brand and offers of specific tourist products. Experts believe that one of the key problems in the implementation of the project is the lack of awareness of potential tourists from third countries about the region and the opportunities it can provide.

In addition, experts already in the spring of 2020 talked about the global crisis in the tourism industry caused by the Covid-19 pandemic and general isolation:

- Tour operators now impoverished
- **Experts emphasize the need for efforts from all three components of the region:** only an interregional project. All three must be regions. At least Petersburg and Leningrad region. Optimum Petersburg, Leningrad region and Karelia, because it is completely closed. You understand that even in this case it is not so capital intensive. Finland will definitely win. Finland will load its. But our ports are at least from Kotka, and there we have excellent contacts with yacht clubs, with others. But it must be a network. It is necessary to create a network of Russian yacht marinas with services, places of interest, excursions and other things, and connect European ones.

- **Experts are almost unanimous that such a combined product would be of interest to travelers arriving from a far:** Asian tourists travel a long way when they come here. Probably, the idea of a tourist corridor is great, because they will be able to visit both St. Petersburg and Leningrad in one trip. The regions with their own characteristics, and also to go to Finland - to another country that is guided by other values. There, of course, there is also history, architecture, but more cleanliness, nature, active rest.

- **"Pros" and "cons" of tourist traffic from China:** On the one hand, this is a mass tourist (and "wherever they are told, they will go there"). On the other hand, their stay on the territory of St. Petersburg demonstrates that the city is not the main beneficiary - thanks to the system of transport, catering and TFR they have built, money mainly goes back to China. Plus, in the case of building such a route, it is necessary to create conditions, including, first of all, specific meals and a professional guide-interpreter. Basically, experts say that a better "quality" tourist is needed. The low cultural level of Chinese guests, which repels local residents, is a problem. In addition, many experts talk about the overestimated economic feasibility for the host of increasing tourist flow from China.

IV STAGE

The above-mentioned promising types of tourism were also pointed out in interviews by experts from the professional community in the field of tourism. In addition, market experts noted significant prospects for the development of the camping infrastructure. Also, during the interview, MICE tourism was noted as one of the most promising types of tourism in St. Petersburg. In addition, despite a number of contradictory assessments, many experts are confident in the prospects for the development of yacht tourism (construction of yacht marinas and related infrastructure).

The promising types of tourism highlighted separately for St. Petersburg, the Leningrad region, the Saimaa region prove the opportunities for creating a united tourism product that would combine tourism resources and infrastructure of these destinations.

Revealing the main preferences of the modern tourist when choosing tourist trips

As the survey conducted at stage 2 of the project revealed, the main motive for making trips for modern tourists is the opportunity to have fun, relax or to visit attractions. Focus on relaxation and attractions as the key goal of tourist trips determines the main priorities in choosing a travel region. They include the presence of interesting sites in this region (mentioned by two-thirds, 67.9%, of survey participants), the cost of the trip (62.1%), and transport accessibility (47.9%). Each of the other factors of choice, namely the availability of direct transport connection, the quality of hotel services and the range of events, were named by a quarter of those surveyed.

Desk research revealed that nationality also influences the travel preferences of modern tourists.

For example, culinary tourism in Finland is becoming very popular among Japanese tourists, providing an opportunity to try both innovative and traditional meal. Finnish culinary tourism is being developed within the Hungry for Finland culinary tourism project at the Haaga-Helia University of Applied Sciences. Another attractive factor for Japanese tourists is the service culture, as they are accustomed to excellent service in their country. The Japanese are willing to spend money on various travel services and spend more than other nationalities. The Japanese buy a lot of local food when they travel because they tend to bring it as souvenirs and gifts when they return home. Safety requirements are also among the key needs of today's Japanese tourists.

Spanish tourists are attracted to Finland by local architecture and design. In addition, the Spanish tourists coming to Finland in summer prefer active forms of recreation and entertainment in nature. Cycling and boating are very popular. They also visit cultural sites in Finland (churches, castles, fortresses). Finnish winter tourism is especially popular among the Spanish travelers.

For Germans, cultural and recreational activities in nature are of interest in Finland. The most popular activities are hiking, sport fishing, kayaking or rafting. Most of the tourists from Germany like to visit historically significant locations and about a third - museums and art exhibitions, concerts and other events. In winter, skiing, dog sledding, walking, and reindeer safari are popular among Germans. Event tourism and museums are of much less interest in winter.

The Saimaa Lake District with more than 50 thousand km of coastline, according to researchers, is of interest to tourists mainly in the context of summer holidays.

The sights of St. Petersburg and the Leningrad Region are the main resource attracting tourists from all countries of the general population. At the same time, there are some national characteristics of demand. For example, tourists from China (primarily the elderly) are attracted to St. Petersburg and the Leningrad Region by the opportunity to visit not only the Hermitage, St. Isaac's Cathedral, etc., but also the places of military and revolutionary glory (the so-called "red" tourism).

Tourists from Asia who come to St. Petersburg and the Leningrad Region are interested in shopping, primarily in the purchase of inexpensive and high-quality amber.

In general, the following preferences of foreigners in relation to St. Petersburg and the Leningrad region can be distinguished:

- ✓ Historical and cultural heritage (first of all, this refers to St. Petersburg and the nearest suburbs (Peterhof, Pushkin, Pavlovsk, Kronstadt), to a lesser extent - to regional objects (Gatchina, Vyborg, Yam, Oreshek, Koporye, Staraya Ladoga, etc.);
- ✓ Wealth of nature (Karelia and Vuoksa, Sablinskie caves, Mon Repos);
- ✓ National color (Mandrogi village);
- ✓ Finnish citizens are attracted by "nostalgic" tourism (to places previously owned by Finland);
- ✓ Active rest (a large number of sports and tourist centers, ski resorts: Snezhny, Zolotaya Dolina and Red Lake in Korobitsyno; Igora near the village of Sosново, Yukki sports and recreation park, a base in Kavgolovo, Okhta -park ", " Puhtolova Gora ", " Tuutari Park ");
- ✓ Military and patriotic tourism (parts of the Oranienbaum bridgehead in the forts Krasnogvardeisky and Krasnaya Gorka, the Museum "Breaking the Siege of Leningrad", created on the sites of fierce battles for Leningrad, "The Road of Life", the memorial complex "Nevsky Pyatachok"). [1]
- ✓ Changes in the preferences of the modern tourist are reflected in the demand for new topics of tourist travel. A desk study, as well as interviews with experts, showed that travel topics such as Transformative, Bleisure, Experience, Wellness and Solo are gaining popularity.
- ✓ Table 1.4.1 provides a description of these topics.
- ✓ TOP-5 promising tourist travel topics

No.	Subject	Description
1	Transformative	Travel with an emphasis on self-reflection and self-knowledge (with an attempt to incorporate the results of work on oneself during the journey into everyday life upon returning home). The tourist is interested in the long-term positive impact of transformative travel on his life. Both group transformative trips and individual trips are possible. As part of a transformative trip, both planned transformations (for example, mastering a new skill) and unplanned ones (occur spontaneously during the trip, changing the tourist's world for the better) are possible. Examples of transformative travel: yoga tours, volunteer travel, etc.
2	Bleisure	A combination of "business" (business) and "leisure" (leisure) types of tourism. Working trips with days of rest at the point of stay. The growth rate is about 20% per year. [2] Most often, a business trip is transformed into a bleisure trip under the following conditions: <ul style="list-style-type: none"> - the destination offers a quality entertainment program, - the destination is an iconic place or place where a business traveler would like to go on vacation, - the destination has a good navigation and orientation information system for tourists,

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		<ul style="list-style-type: none"> - a business trip falls at the end or beginning of the working week (it is possible to add Saturday and Sunday), - converting a business trip into a bleisure trip does not require significant additional costs.
3	Experience	The trip is not as an acquisition of tourist services, but as an acquisition of new life experience. Experience tourism emerged as a counterbalance to traditional travel, which boils down to the fact that tourists visit a mandatory set of attractions (must-see, to-do list, etc.). Experience tourism focuses on finding activities that meet the personal interests of the tourist, that can enrich his life.
4	Wellness	Trips that fit the concept of a healthy lifestyle based on a combination of physical and mental health, healthy eating, reasonable exercise and avoiding bad habits. Wellness trips are not limited to spas and resorts; this theme can be realized both in urban space and in the natural environment.
5	Solo	A kind of individual tourism, in which tourists, of their own free will (and not from the absence of a company) travel alone. The motivation for solo trips can be different. For example, a tourist is inspired by such films as "Under the Tuscan Sun", "Eat, Pray, Love", etc. Solo trips can correspond to a person's lifestyle or, on the contrary, it will be a trip that a person takes once in a lifetime, being at a crossroads (divorce, retirement) or realizing a dream (pilgrimage, climbing a mountain). Common features of tourists who prefer solo trips: a fairly high socio-economic status, medium / high income level, a strong desire to travel, interest in culture, gastronomy, etc.



The research carried out within the framework of the project showed that the demand for tour operators and travel companies as organizers of tour trips is not too high.

Due to the fact that the Internet is the key communication channel for obtaining information about tourist products in St. Petersburg, the Leningrad Region and the Saimaa region, the IntelMedia company analyzed the requests of Key findings of potential tourists' Internet inquiries

- ✓ Analysis of the five-year dynamics of search queries demonstrates a pronounced seasonality of public interest both in the region as a whole and in its individual components (settlements, as well as to Saima and Vuoksa): the peaks are, as a rule, in June-August, and the minimum values (despite for the availability of New Year and Christmas holidays) - for December-January. (see figure 3.4) There is some upward trend in interest.
- ✓ The picture with regard to St. Petersburg practically repeats the general one for the region: the peaks of interest are in June, the recessions - in December-January. (see figure 3.5). Peaks of public interest were noted in April 2017 (in connection with the terrorist attack in the metro) and in the summer of 2018 (in connection with the FIFA World Cup).
- ✓ The dynamics of the number of inquiries regarding Imatra shows the absence of such a pronounced seasonality: a certain surge in December 2016 is associated with an incident with a shooting in this city, during which several people died.



- ✓ With regard to smaller settlements (Parikkala, Ruokolahti, Luumäki, Taipalsaari, Savitaipale, Rautjärvi, Mikkeli, Savonlinna, Lemi), the public interest is minimal, the leaps are within the statistical error and for a number of cities listed is insufficient for the formation of reliable statistics for Google Trends) ...

Sources of Internet requires

The toponyms under consideration can be conditionally divided into two groups:

- ✓ Toponyms, among the search sources for which the prevalence of queries from the country to which they themselves belong is noticeable; the share of other states is insignificant. This is Lappeenranta (in second place in terms of the number of requests - Russia - only 4% of the number of requests made from the territory of Finland itself, in third - Estonia (2%), in fourth - Sweden and Greece (1%)), as well as small towns (Lemi, Luumäki, Parikkala, Rautjärvi, Ruokolahti, Savitaipale, Taipalsaari).
- ✓ A significant volume of requests was made from the territory of other states: Imatra (the volume of requests from the territory of Russia is practically equal to those made from the territory of Finland, in third place is Estonia), Vyborg (the volume of requests from the territory of Finland even exceeds the volume of requests from the territory of Russia), in third place - Estonia and others (see below).
 - **Lappeenranta:**
 - Finland - 100%
 - Russia - 4%
 - Estonia - 2%
 - Sweden, Greece - 1% each
 - **Imatra:**
 - Finland - 100%
 - Russia - 98%
 - Estonia - 20%
 - Sweden - 9%
 - Greece - 4%
 - **Vyborg:**
 - Finland - 100%
 - Russia - 71%
 - Estonia - 11%
 - Belarus, Latvia - 6%
 - Sweden - 5%
 - Ukraine - 3%
 - Kazakhstan, Denmark - 2%
 - Israel - 1%
 - **St. Petersburg:**
 - Russia - 100%
 - Estonia - 32%
 - Belarus - 26%
 - Latvia - 19%
 - Kyrgyzstan, Uzbekistan - 13%
 - Moldova, Kazakhstan - 11%
 - Finland - 10%

- Armenia, Ukraine - 9%
- Lithuania - 8%
- Azerbaijan - 6%
- France, Switzerland, Czech Republic - 5%
- Belgium, Spain, Bulgaria, Israel, Germany, Austria - 4%
- Netherlands, Sweden, Slovakia - 3%
- Portugal, Italy, Norway, Argentina, UAE - 2%
- Morocco, UK, Ireland, Romania, Chile - 1%
- **Zelenogorsk:**
 - Russia - 100%
 - Finland - 31%
 - Ukraine - 9%
 - Belarus - 8%
 - Kazakhstan - 3%
 - Czech Republic, Poland - 1%
- **Vuoksa:**
 - Russia - 100%
 - Finland - 70%
 - Belarus - 29%
 - Ukraine - 28%
 - Slovenia - 7%
 - Serbia, Germany - 3%
 - Switzerland, Sweden - 2%
 - Poland, Canada, USA - 1%
- **Saima:**
 - Finland - 100%
 - Estonia - 18%
 - Kyrgyzstan - 7%
 - Russia - 3%
 - Sweden, Italy, Latvia, Czech Republic - 2%
 - Lithuania, Spain, Belarus, Switzerland, Poland, Norway, Belgium, Germany, Ukraine - 1%

The analysis of search queries showed a relatively high level of awareness of the population of third countries (especially Germany and the USA) regarding a number of "points of attraction" (man-made and non-man-made) cities in the region (Alvar Aalto's library, Vyborg Castle State Museum in Vyborg, Lappeenranta University of Technology, University of Applied Mikkeli and Aalto University School of Business), however, in the countries of the East (Hong Kong, Taiwan, China) there is a lack of knowledge about the region, and the tourist attractions of some locations (Mikkeli, Imatra) are not at all "heard".

In addition, the study analyzed Internet resources.

An analysis of the websites of tourist centers in Russia and Finland made it possible to single out the following in terms of the aggregate quantitative characteristics of the audience and results in search engines as key information sources.



It should be noted that the results of the survey conducted at stage 3 revealed the need to include the state of Latin America (Brazil, Mexico) in the list of countries of the general population. The potential demand for the combined product from the Latin American and US markets is most likely driven by the high cost of air travel from these regions and the desire to get the most out of one relatively expensive trip.

Also, the rise of general interest in our region on the part of South American countries, caused by the positive effect of the 2018 FIFA World Cup, affects (in St. Petersburg, fans from South America made up the majority of foreign guests of the 2018 World Cup, since a significant part of the matches of their teams took place in St. Petersburg), a new visa policy (electronic visas for Mexican citizens).

As for the US market, despite the fact that mainly cruise tourists from this country come to St. Petersburg on a 72-hour visa-free entry, interest in opening the region "around" St. Petersburg and in combination with Finland and Sweden is stable high (according to Visit Finland).

Summarizing the results of the study, we can identify the most promising target audiences of potential tourists (TOP-5):

1. Seekers of new cultural, aesthetic, natural, gastronomic discoveries - "Innovators - Intellectuals" and "Collectors of impressions", hereinafter - "Collectors".

2. Connoisseurs of traditional beauty (architectural, beauty of works of art, beauty and purity of nature) - "Intellectuals - Traditionalists" (hereinafter - "Intellectuals").

3. Tourists who prefer and combine rest in the city with rest and activities in nature (soft outdoor activities), hereinafter referred to as "Combinators".

4. Tourists looking for solitude in nature, fleeing from a difficult epidemiological situation and the bad ecology of big cities, hereinafter referred to as "Naturalists".

5. Tourists "running away" for a long weekend doing so-called. "Travel breaks" at work for 2-3 days, leaving with the company to a new place to celebrate a holiday, etc., European youth for short trips; further - "Party People".

TOP-5 of the most promising target groups of potential tourists

No.	CA	Countries / Regions - Demand Generators	Specifications	Message for this target audience
1.	"Collectors"	China, South Korea, Japan, other countries of East and Southeast Asia, developed countries of the Arab world (UAE, etc.), EU countries, USA / Canada, Israel, etc. Tourists from Moscow and other large Russian cities - for the Saimaa region	Groups and mini-groups, families and groups of friends / interest partners. Age groups: 35-50 years old, 50-65 years old and 65+ Higher education Above average and high income 3-7 - day tours and trips	Novelty, new impressions, a kaleidoscope of impressions and tastes, many different impressions within one trip, etc.

		<p>New tourists (first time in the region):</p> <p>Long haul markets: USA, Japan, Israel, Brazil, Mexico, South Africa, Australia</p> <p>"Neighbors": Great Britain, Sweden, Netherlands, Estonia, Denmark, Belarus</p>		
2.	"Intellectuals"	<p>EU countries, USA / Canada, Israel, etc.</p> <p>China, Japan, South Korea, developed countries of the Arab world (UAE, etc.)</p> <p>Tourists from Moscow and other large Russian cities - for the Saimaa region</p> <p>Both new and "repeat" tourists</p>	<p>More massive target audience than the Collectors group</p> <p>Groups and individuals, families with children</p> <p>Age groups: 35-50 years old, 50-65 years old and 65+</p> <p>Secondary / higher education</p> <p>Average and above average income</p> <p>3-7 - day tours and trips</p>	<p>Emphasis on the diversity of the tourist's traditional values, attractions and unique and multiple experiences</p> <p>Emphasis on the beauty, richness of the cultural and natural heritage of the region</p>
3.	Combinators	<p>China, Japan, South Korea, Germany, Scandinavia (especially Norway), UK, France, Belgium / Netherlands, South America, Israel, USA / Canada, Australia</p> <p>Tourists from Moscow and other large Russian cities</p> <p>New tourists:</p> <p>Long haul markets: USA, Japan, Israel, Brazil, Mexico, South Africa, Australia</p>	<p>Groups and mini-groups, families and groups of friends / interest partners, individuals.</p> <p>Age groups: younger audience than 1 and 2: 25 - 35, 35 - 50</p> <p>Secondary / higher education</p> <p>Average and above average income</p> <p>Tourists who are "not enough" of St. Petersburg alone and are also interested in</p>	<p>"Two in one", "three in one", a cocktail of flavors, harmony of the North (culture and nature in harmony), etc.</p>

		"Neighbors": Great Britain, Sweden, Netherlands, Estonia, Denmark, Belarus	northern nature and outdoor activities 7-14 days tours and trips	
4.	"Naturalists"	For the Leningrad region and the Saimaa region: tourists from Moscow and other large Russian cities; China, Germany, UK, France, Belgium / Netherlands Both new and "repeat" tourists	Groups and mini-groups, families with children, families and groups of friends / interest partners. Age groups: 35-50 years old, 50-65 years old and 65+ Higher education Average and above average income 3-7 - day tours and trips	Cleanliness and environmental friendliness, uniqueness of nature and landscapes, safety and health promotion, recreation
5.	"Party People"	Tourists from Moscow and other large Russian cities, from large cities of the EU countries included in the e-visa list Both new and "repeat" tourists	Individuals and mini-groups Age groups: 18-25, 25 - 35, 35 - 50 Secondary / students / higher education Below average / average and above average income 2-3 day individual trips	Emphasis on special offers, promotions, promotion of events and activities, new activities, routes and attractions Promotion of the "e-visa" project on the EU market Promotion of low cost airlines to St. Petersburg, Lappeenranta, Savonlinna



Recommendations on the structure of the combined tourist product "St. Petersburg - the region of Finland"

Based on the profile of a potential tourist described above, tourism products based on a combination of cultural, historical and natural resources, combining several types of transport, united by one conceptual basis, may be in demand.

As the borders open after the pandemic, the demand for combined tourist products from St. Petersburg - Leningrad region - Saimaa region may increase due to:

- ✓ demand for short trips on the most secure modes of transport (car, boat, yacht, minibus) will increase;
- ✓ the demand for trips to "clean" nature for the purposes of recreation and health improvement, restoration of strength and immunity will increase;
- ✓ there will be an increase in demand for new destinations and routes that are not associated with a large number of contacts and traffic, in the immediate vicinity of major tourist hubs (up to 3 hours of travel);
- ✓ the demand for individual travel will clearly exceed the demand for travel in large groups.

The position of the Leningrad region in the context of the combined tourist product "St. Petersburg - Saimaa region, Finland"

Since the end points of the route will be St. Petersburg and the Saimaa region, the Leningrad region will be a transit area, at best with 1-2 stops and no more than 1 overnight stay along the route, depending on the program and the logistics of the trip.

The most attractive point for tourists in the Leningrad region between St. Petersburg and the Saimaa region is the city of Vyborg.

Recall that at stage 2 of the project, a competitive strategy for promoting the combined tourism product "St. Petersburg - Saimaa region" was developed, within which the following recommendations were given:

The projected combined tourism product "St. Petersburg - Saimaa region, Finland" should be:

- ✓ combined, combining cultural, historical, urban tourism and outdoor recreation (St. Petersburg, as the world's leading destination for urban and cultural tourism, according to the World Travel Awards 2017-2018, 2020 and recreation on the largest lake in Finland, in the ecologically clean northern region);
- ✓ interregional and interethnic (at least three regions, two countries);
- ✓ quite long in distance (at least 200 km), combining a large number of attractions and stops, i.e. implying a certain number of overnight stays - from about 4 to 7;
- ✓ targeting distant markets and long-haul flights, where it is important for tourists to visit several destinations in one trip, which is usually expensive due to the distance;
- ✓ for tourists from neighboring countries and regions - to position the difference, the difference in impressions received during one trip;
- ✓ concentrated around St. Petersburg as the "star" of the route and tourist hub;

- ✓ especially attractive for long-distance tourists, for whom St. Petersburg - Saimaa can be positioned as a single, equidistant from them region: St. Petersburg / Helsinki, as the main points of entry / exit.

In addition to the above, the combined tourism product should be focused on the 5 main target audiences described above and target the respective target markets.

Below are the projects of tourist routes within the tourist product "St. Petersburg - Saimaa region", structured by the type of transport used.

It should be noted that the tourist product "St. Petersburg - Saimaa region" can combine a combination of various types of transport and delivery of tourists, which is a vivid competitive advantage: air, river cruise, sea cruise, yacht-boat, railway, bicycle, automobile, bus, caravan ...

Recommendations for the promotion of the combined tourist product "St. Petersburg - Saimaa region"

Recall that at stage 2 of the project, a competitive strategy for promoting the combined tourism product "St. Petersburg - Saimaa region" was developed, within which the following recommendations were given.

Criteria for the selection of markets, priority for the promotion of the combined product St. Petersburg - Leningrad region - Saimaa region:

1. The country / region should be among the main markets giving the largest tourist flows, both to St. Petersburg / Leningrad region and to Finland / Saimaa region, with good growth potential (as of 2018-2019).
2. As part of the tour stream, from the country / region in question, there should be representatives of the above target audiences (5 CA).
3. The foreign country in question should be a priority of 52 countries that are allowed to enter the Russian Federation on an electronic visa from January 01, 2021, and even earlier - from October 01, 2019 - they were allowed to enter St. Petersburg and the Leningrad region via e-visa; either the Russian Federation and Finland have a visa-free regime with this country at the same time.

Within the framework of the Stage 2 Report, countries were identified as the main suppliers of tourists. It was found that they are largely the same for St. Petersburg, the Leningrad region and the Saimaa region of Finland, although the order of countries in the ranking differs for each region in the study area.

Leading countries with the largest tourist flow by entry to St. Petersburg, Leningrad region, Saimaa region Finland

Leading countries with the largest tourist flow by entry to:			
No.	St. Petersburg and Leningrad region	Savonlinna and Mikkeli, South Savo [³]	Imatra and Lappeenranta, South Karelia [⁴]
1	Finland	Russia	Russia

3

4



2	Estonia	Germany	Germany
3	Germany	Switzerland	Sweden
4	China	Estonia	Estonia
5	USA	Sweden	China
6	Uzbekistan	Italy	Italy
7	Ukraine	France	Great Britain
8	France	Spain	Netherlands
9	Italy	China	Switzerland
10	Tajikistan	Great Britain	USA

The most promising countries for the project in terms of the number of tourists are Germany, Estonia, China, USA, Italy, France.

Representatives of the main target audiences of the project (“Collectors”, “Intellectuals”, “Combinators”, “Naturalists”, “Party People”) meet in the tourist flows of the main tourist powers - generators of potential demand.

TOP-10 countries, according to the Ranking of countries of inbound tourism to Russia (REC, 2018), in descending order:

- ✓ China,
- ✓ South Korea,
- ✓ USA,
- ✓ Germany,
- ✓ Spain,
- ✓ Israel,
- ✓ Great Britain,
- ✓ Hong Kong,
- ✓ Thailand,
- ✓ Switzerland.

Countries where a visa-free regime exists with Russia and Finland at the same time:

- ✓ Hong Kong,
- ✓ Macau,
- ✓ Israel,
- ✓ South Korea,
- ✓ almost all countries in South and Latin America.

Also, it is necessary to take into account the list of 52 countries whose representatives are allowed to enter the Russian Federation on an electronic visa from January 01, 2021.

Of the countries generating the largest flows to St. Petersburg and the Saimaa region, these are:

- ✓ Germany,
- ✓ China,
- ✓ Estonia,
- ✓ France,
- ✓ Italy.

Tourists from the USA in St. Petersburg are mainly cruise tourists, who are not the target audience for the project. At the same time, the United States was not included in the list of 52 e-visa countries. However, American interest in the discovery of the region “around” St. Petersburg is consistently high, according to a survey on the 3rd stage of the project. The US tourist market, according to the World Tourism Organization, is one of the main generators of demand for overseas travel (it is constantly included in the TOP 5 largest markets). Therefore, we can conclude that the US market for the St. Petersburg - Leningrad region - Saimaa region is promising.

Thus, as a result of comparing the above priority lists, the list of the most promising target markets for promotion (countries promising for attracting tourists for the project) is formed as follows (TOP-5):

- ✓ China,
- ✓ South Korea,
- ✓ Germany,
- ✓ France,
- ✓ Italy.

Other promising 10 markets: USA, Estonia, Israel, Hong Kong / Macau (cities are 40 minutes away by high-speed boat from each other), Thailand, Switzerland, Sweden, Spain, UK, Netherlands.

Separately, it is worth noting the huge tourist market in Moscow, as well as in large cities with a million-plus population in the Russian Federation, which have direct flights from St. Petersburg (Kazan, Yekaterinburg, Perm, etc.). The Russian market has great potential for travel to St. Petersburg and the surrounding regions, including Saimaa.

Demand factors such as:



- ✓ a large number of repeated trips (I want something new);
- ✓ a certain "untracked" South-East Finland in the markets of Moscow and large Russian cities (with the exception of St. Petersburg), and, at the same time, a positive tourist image of Finland in the Russian market;
- ✓ convenient logistics from St. Petersburg and the ability to combine two countries in one trip;
- ✓ an opportunity for the destinations of the Leningrad Region and South-Eastern Finland to use the exceptionally favorable tourist image of St. Petersburg on the domestic market.

It is expedient to promote the combined product St. Petersburg - Saimaa in markets for which the identity of one single region can be formed. These are practically all of the listed Asian markets, Israel.

The identity for the tourist is formed by:

- ✓ a single event series;
- ✓ a single souvenir / craft range;
- ✓ a set of general gastronomic specialties;
- ✓ a unified concept of routes;
- ✓ unified products (for example, a unified Guest Card of St. Petersburg - Leningrad region - Saimaa region);
- ✓ uniform branding of routes.

On the contrary, in European markets, in the market of Moscow and Russian large cities, it is necessary to promote the difference, the difference in impressions received during one trip.

Accordingly, it is necessary to form routes within the project, taking into account these two circumstances.

Target markets and audiences of proposed chain routes "St. Petersburg - Leningrad region - Saimaa region"

Tourist routes	Markets	CA
1. "To Finland - across the Gulf of Finland"	Asian, European, USA, Moscow and large cities of the Russian Federation	"Collectors" "Intellectuals" Combinators "Naturalists"
2. "EURO-VELO-PETER"	European, Moscow	Combinators "Naturalists" "Party People"
3. Along the Saimaa Canal	Asian, European, USA, Moscow and large cities of the Russian Federation For yachting - European, Moscow	"Collectors" "Intellectuals" Combinators "Naturalists" "Party People"

4. "Allegro"	Asian, European, USA, Moscow and large cities of the Russian Federation	"Collectors" "Intellectuals" Combinators "Naturalists" "Party People"
5. Auto routes St. Petersburg - Leningrad region - Saimaa region	Asian, European, Moscow and large cities of the Russian Federation For autocaravanning: European.	"Collectors" "Intellectuals" Combinators "Naturalists" "Party People"

Regarding the distribution of the proportions of independent and organized tourism within the framework of travel through the territory of the regions of St. Petersburg, Leningrad Region, Saimaa Region, Finland, it can be stated that the share of individual tourism will increase, and that of group tourism will decrease. In addition to the general trend of recent years aimed at an increase in the number of individual travel, the development of aggregators and booking systems and the decline in TO activities, the COVID-19 pandemic has contributed to this trend. Traveling in large groups and in large vehicles is less safe. Accordingly, as borders open, the share of independent travel will continue to grow, and the share of organized travel will decline.

Promotion

Accordingly, the strategy of promoting the combined tourism product "St. Petersburg - Saimaa region" in remote markets should emphasize the mentioned competitive advantages and take into account the risks.

Measures to attract transport companies operating on the territory of St. Petersburg, the Leningrad Region and the Saimaa Region, Finland:

- ✓ free marketing support (advertising on the project website, mobile application, social networks, distribution of printed products, cross-marketing, correspondence participation in tourism exhibitions, events, etc.);
- ✓ free information support (TICs, call center, free provision of information to consumers);
- ✓ uniform branding of routes and marking of transport;
- ✓ support in passing formalities at the border (dedicated lines and border control windows for project participants);
- ✓ assistance in finding clients (travel companies, corporate customers);
- ✓ grants and contests (prize for the "best carrier of the year", etc.).

Measures to attract travel companies (travel agencies, agencies) working with target countries to receive and send tourists to St. Petersburg, the Leningrad Region and the Saimaa Region Finland:

- ✓ formation of unified services (Guest card, unified transport cards, etc.);
- ✓ free marketing support;

- ✓ free information support;
- ✓ uniform branding of routes;
- ✓ a transparent and unified system of ticket sales to museums and theaters;
- ✓ accreditation of route guides, advanced training of guides;
- ✓ establishment of uniform discounts for additional attraction of tourists (in the off-season, on new routes, etc.);
- ✓ B2B events and exhibitions;
- ✓ grants and contests (prize "Tour Operator of the Year", cashback for tourists, prizes and gifts for tourists);
- ✓ distribution of free branded souvenirs to tourists.

Regarding overcoming the existing barriers in obtaining visas between Russia and Finland, according to expert estimates, it is necessary to act in the following areas, in general, taking into account the positive innovation - the introduction of electronic visas to Russia from January 01, 2021:

- ✓ Simplify the procedure for filling out visa application forms to the Russian email. visa (many refusals at the border);
- ✓ reduce the cost of Russian email visas from USD 40 to USD 20 at least;
- ✓ increase the number of checkpoints at the border through which entry with an electronic visa is possible;
- ✓ simplify the visa application form as much as possible, remove unnecessary information;
- ✓ lobby for an expansion of the list of 52 countries (mainly with USA, Canada, UK, Australia and New Zealand);
- ✓ introduce new types of visas - in particular, medical;
- ✓ to expand the technical capabilities of checkpoints on the border, with the aim of the speediest passage of all formalities;
- ✓ synchronize the visa legislation of Russia and Finland, as far as possible, to facilitate tourist exchange from third countries.