

IntelMedia Ltd.

Affirmed by
CEO
IntelMedia Ltd.

_____ A. Kozeichouk
September 27, 2019

EXECUTIVE SUMMARY

on the services aimed at the creation of the most effective model of
the cross-border cycling tourism on the territory of the Leningrad region
under the contract № 1263 dated August 12, 2019

PART 2. Executive summary on the survey of representatives of SMEs in
tourism and hospitality industry and managers of attraction facilities
operating in Vyborgsky and Priozersky districts of the Leningrad region

St. Petersburg
2019



Within the project a survey of representatives of SMEs in tourism and hospitality industry as well as managers of attraction facilities operating in Vyborgsky and Priozersky municipal districts of the Leningrad region was conducted.

By SMEs in tourism and hospitality industry, the accommodation and catering facilities, entertainment, parking lots and other services are meant. It must be noted that accommodation facilities include the so-called special accommodation (e.g., campsites).

By attraction facilities within the project museums, touristic complexes, theme parks, nature reserves are meant.

IntelMedia company interviewed:

- 100 respondents representing SMEs in tourism and hospitality industry operating in the Priozersky and Vyborgsky districts of the Leningrad region.

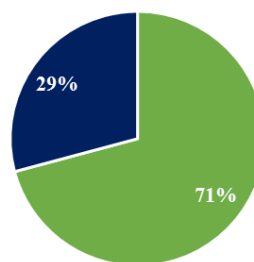
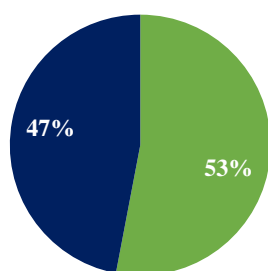
- 50 respondents representing management teams of attraction facilities in the Priozersky and Vyborgsky districts of the Leningrad region.

In general, the following conclusions were made basing on the results of the survey of representatives of SMEs in tourism and hospitality industry as well as managers of attraction facilities operating in the Vyborgsky and Priozersky municipal districts of the Leningrad region:

- ✓ Currently, cycle tourists cannot be attributed to the target audience of the SMEs in tourism and hospitality industry operating in the Vyborgsky and Priozersky districts of the Leningrad region. Attraction facilities are, on the opposite, targeting cycle tourists. However, they preserve the potential for further increase in the amount of cycle tourists attracted.

SMEs in tourism and hospitality industry

Attraction facilities

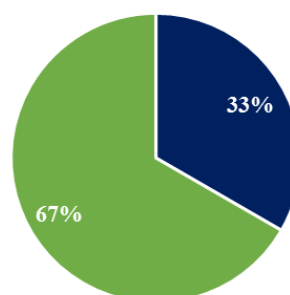
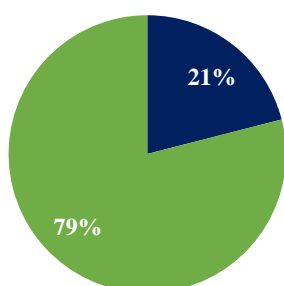


- There are cycle tourists among the visitors
- There are no cycle tourists among the visitors

- ✓ SMEs in tourism and hospitality industry as well as attraction facilities in the Priozersky and Vyborgsky districts of the Leningrad Region are less oriented on the organized groups of foreign tourists than on Russian tourists.
- ✓ Foreign cycle tourists make up a very small segment of the consumer audience of SMEs in tourism and hospitality industry as well as attraction facilities in the Priozersky and Vyborgsky districts of the Leningrad region.

SMEs in tourism and hospitality industry

Attraction facilities

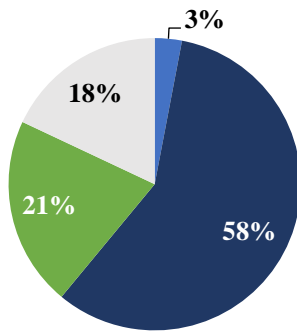


- There are foreign cycle tourists among the visitors
- There are no foreign cycle tourists among the visitors

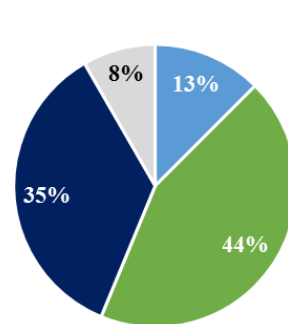
- ✓ The key destination generating the flow of foreign cycle tourists to the Leningrad region, is Finland. Cyclists representing other countries (for example, Germany, the USA, etc.) are the participants of cycling marathons rather than cycle tourists in the classical sense.

✓ Despite the low level of orientation on the cycle tourism, most SMEs in tourism and hospitality as well as most of attractions facilities of the Priozersky and Vyborgsky districts of the Leningrad region are interested in providing services to cycling tourists.

SMEs in tourism and hospitality industry



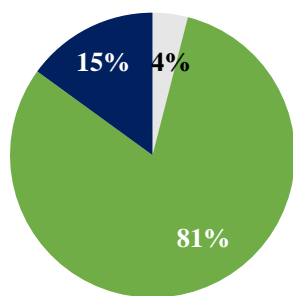
Attraction facilities



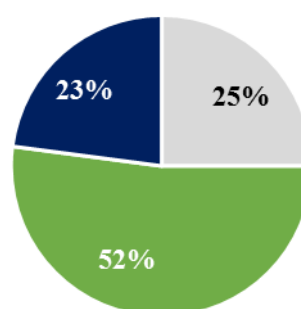
■ uninterested ■ interested
 ■ rather interested ■ rather uninterested

✓ The vast majority of SMEs in tourism and hospitality industry of the Priozersky and Vyborgsky districts of the Leningrad region do not undertake any measures to improve the quality of service for cycle tourists. Among the attraction facilities, the share of organizations implementing these measures is significantly higher.

SMEs in tourism and hospitality industry



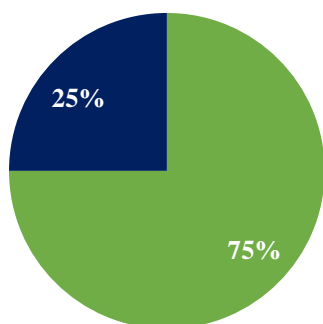
Attraction facilities



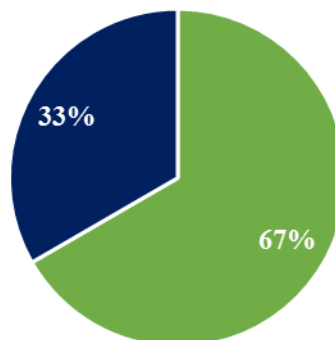
■ measures are being undertaken
 ■ measures are not being undertaken
 ■ measures are being undertaken partly

✓ The vast majority of SMEs in tourism and hospitality industry as well as attraction facilities in the Priozersky and Vyborgsky districts of the Leningrad region are ready to change the range of services in order to attract more cycle tourists, but they are not ready (or unable) to invest in the cycle tourism infrastructure on the territory of their facilities.

SMEs in tourism and hospitality industry



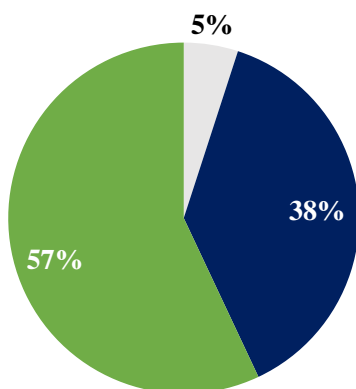
Attraction facilities



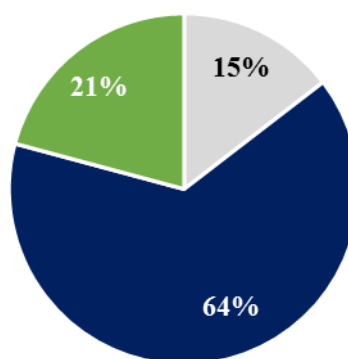
LENINGRAD REGION

- the organisation is ready to change its range of services to attract more cycle tourists
- the organisation is not ready to change its range of services to attract more cycle tourists

SMEs in tourism and hospitality industry



Attraction facilities



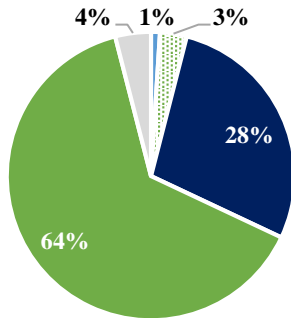
LENINGRAD REGION

- the organisation is ready to invest in the cycle tourism infrastructure on the territory of its facilities
- the organisation is not ready to invest in the cycle tourism infrastructure on the territory of its facilities
- not sure

- ✓ Services that are already being provided to cycle tourists by SMEs in tourism and hospitality industry as well as by attraction facilities in the Priozersky and Vyborgsky districts of the Leningrad region, include: drinking water; information on medical services nearby; tourist information services; first aid kit / medical center; outdoor bicycle parking and secure bicycle parking lots.
- ✓ Accommodation facilities most often offer the following services useful for cycle tourists: take-away food, lunch boxes, vending; online booking; catering facilities; luggage room / luggage storage services.
- ✓ SMEs in tourism and hospitality industry as well as attraction facilities in the Priozersky and Vyborgsky districts keep a significant reserve for increasing the awareness of opportunities for cycle tourism in their areas.
- ✓ Key measures essential for increasing the flow of cycle tourists include as follows: the improvement of cycle tourism safety; the development of approved cycle routes, as well as the popularization of the Priozersky and Vyborgsky districts of the Leningrad region as destinations for cycle tourism.
- ✓ The most significant areas for the development of cycle tourism include as follows: the improvement of infrastructure and the development of tourist facilities; provision of security in the industry; promotion in the domestic and foreign markets; application of information technologies and platforms.

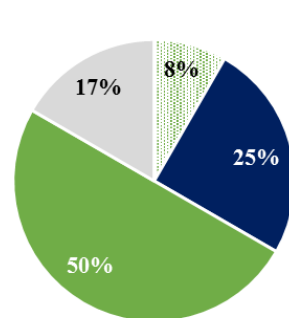
✓ SMEs in tourism and hospitality industry as well as attraction facilities in the Priozersky and Vyborgsky districts are optimistic in the assessment of the prospects for the development of cycle tourism in the border regions of the Leningrad region.

SMEs in tourism and hospitality industry



■ very unfavourable
■ medium
■ very favourable

Attraction facilities



■ rather unfavourable
■ rather favourable

