

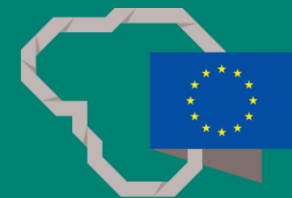


Outbound tourism review. Germany

May 2022



LITHUANIA
TRAVEL



Kuriame
Lietuvos ateitį
2014–2020 metų
Europos Sąjungos
fondų investicijų
veiksmų programa

Study objectives and design

Research country – Germany

The aim of the study:

- To find out travel habits, budgets of travelers from different countries; to identify opinions about Lithuania as a travel destination
- to develop traveler segments from each country
- to identify important drivers and barriers for decision making (to visit Lithuania)

Study design

- Qualitative stage – 2 focus groups in Germany (2h, autumn of 2021)
- Quantitative stage – web survey of people who travel abroad at least once a year (excluding Covid-19 period) (15 min, January – February of 2022)
- Online panel partner: **norstat**

The services of this study implementation were procured within the framework of the European Union Structural Funds project “The promotion of natural and cultural heritage objects (resources) of Lithuania to target inbound tourism markets”, No 05.4.1-LVPA-V-812-03-0001.

Customer: Lithuania travel



Provider: KOG Institute



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Structure of the presentation

1 Travel and tourism market at a glance

2 Lithuania as a travel destination

- spontaneous associations with Lithuania
- attitude towards visiting Lithuania
- drivers and barriers related to travel to Lithuania
- preferences of travelers

3 Main conclusions and recommendations

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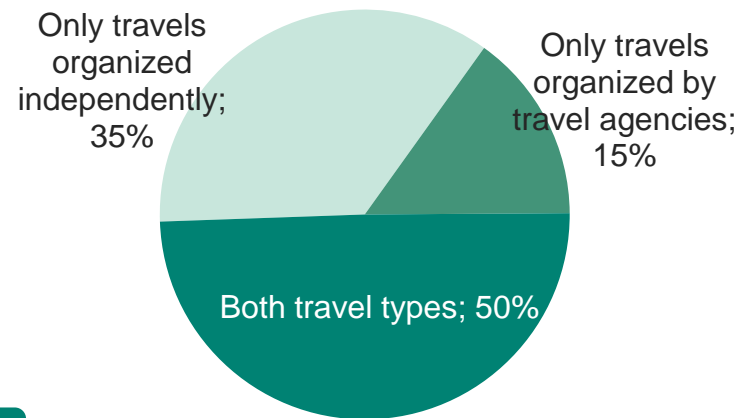
Travel and tourism
market at a glance

1



Most German travelers prefer independently organized trips and leisure trips

Travel organization

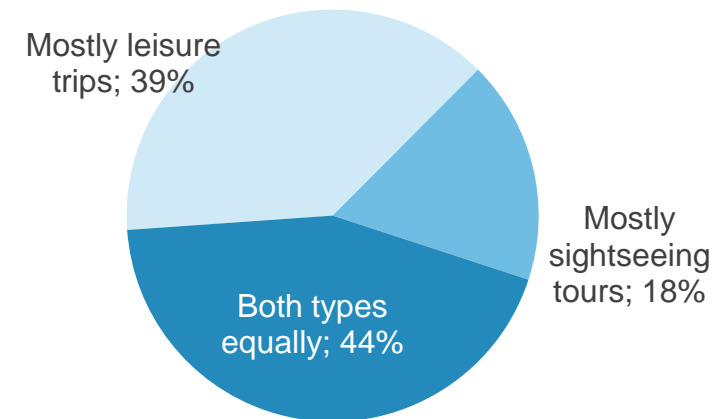


85% organize trip by themselves

65% use services of travel agencies

How do you travel abroad? (single choice)

Preferred type of trip



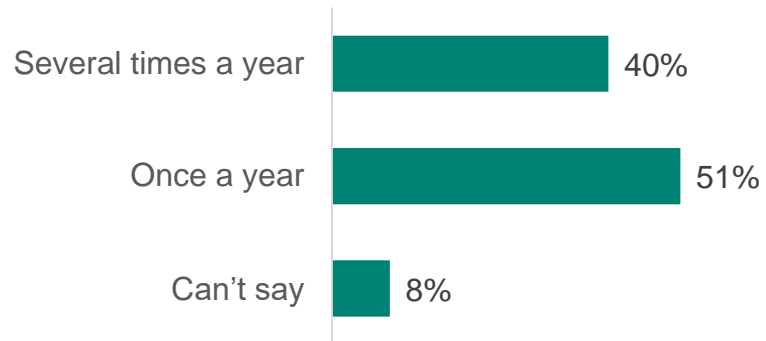
82% like leisure trips

61% like sightseeing tours

What type of trips do you go to more often? (single choice)

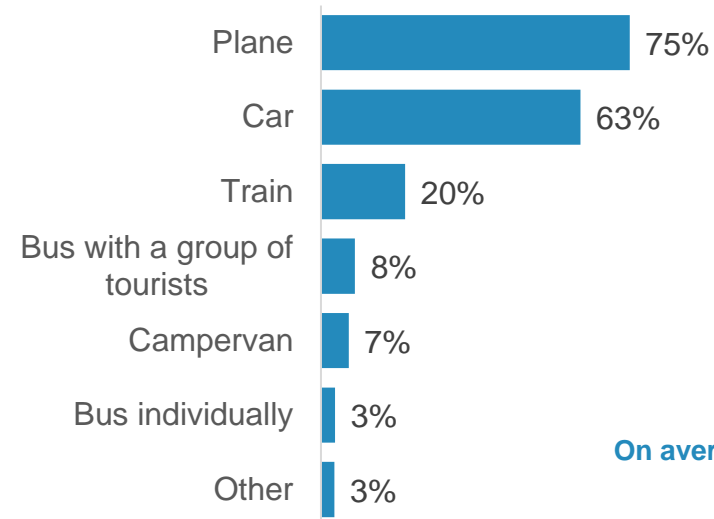
Traveling by car is a popular option

Travel frequency



How often do you travel abroad for tourism? (single choice)

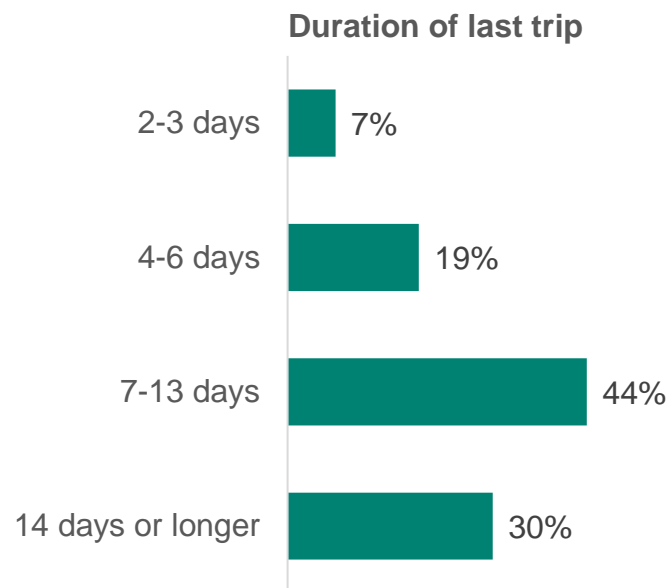
Travel transport



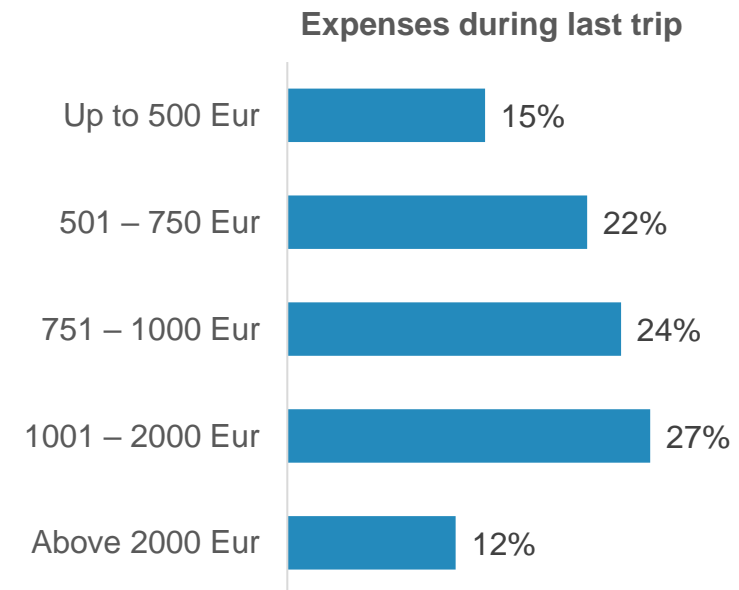
On average **1.8** types of transport means are chosen.

Which means of transport do you usually choose for travelling abroad? (multiple choice)

Most often travel lasts for 1-2 weeks, while the budget depends on the length of travel



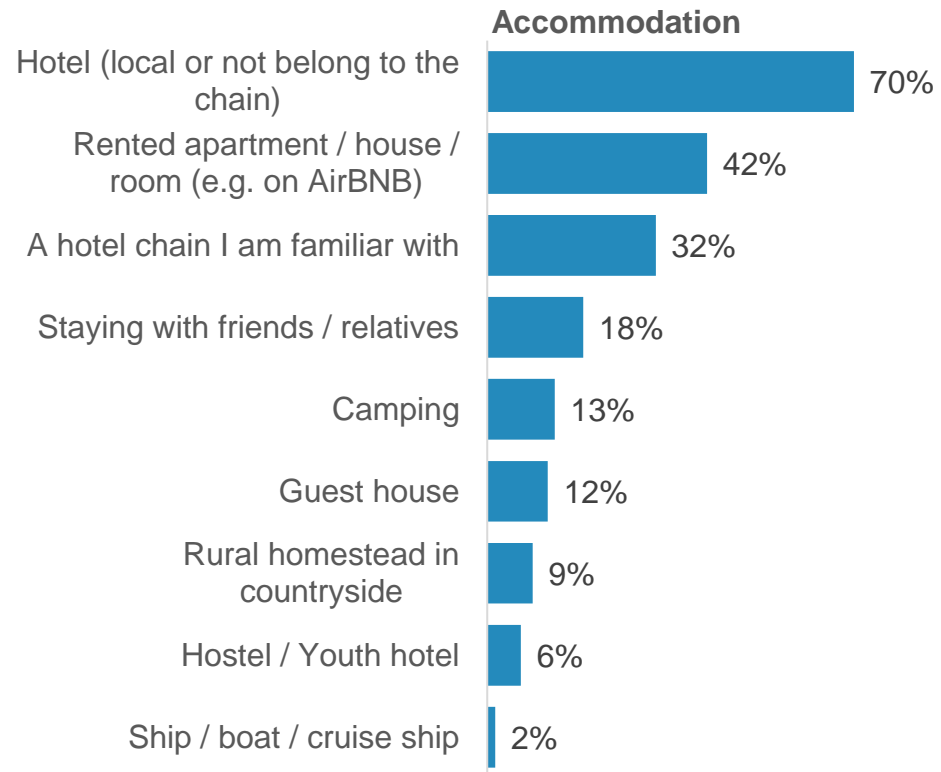
How long was your last abroad travel for tourism? (single choice)



What budget did you spend on your last abroad travel for tourism per person? (single choice)

Local hotels are the most common choice of accommodation

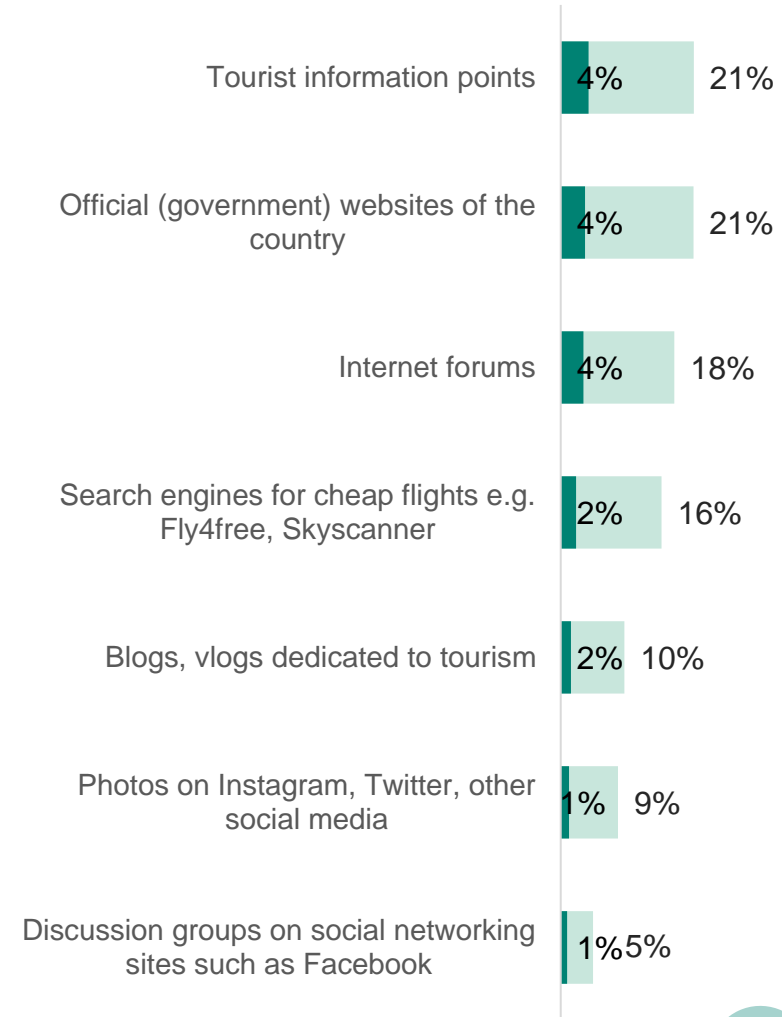
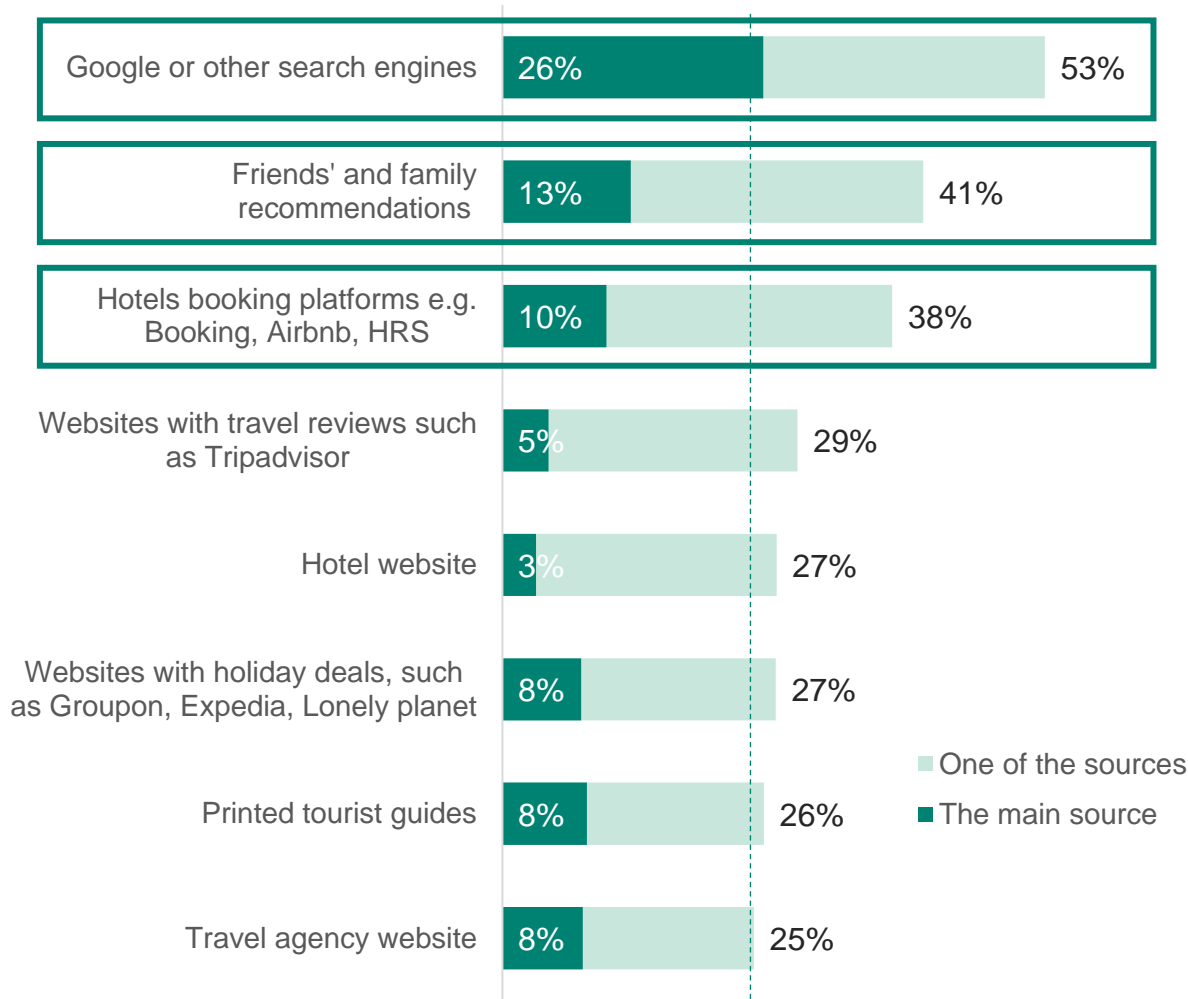
On average **2** types of stay are chosen.



Where do you usually stay when travelling abroad? (multiple choice)

Sources of information

On average **4** sources of information are used.



Sample: All, N=1213

Average usage of all sources (25%)

Where do you usually look for information to plan your vacations abroad? (multiple choice) Which of these sources that you use for information to plan your vacations abroad is your main source of information? (single choice)

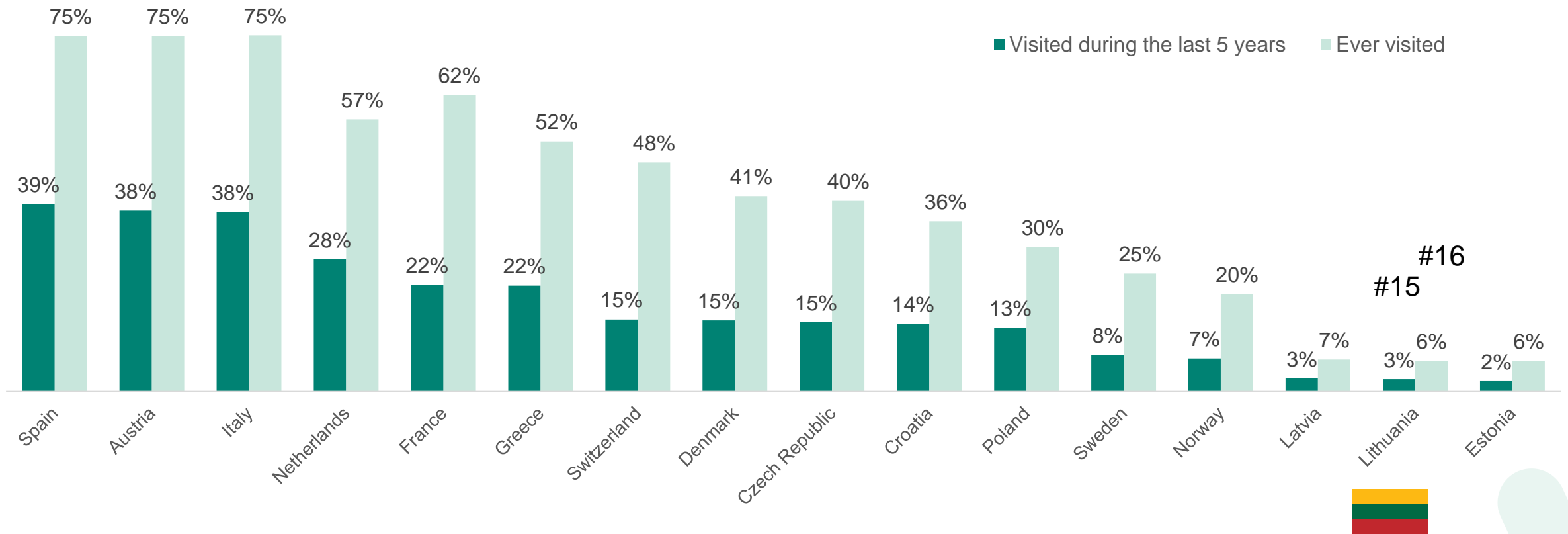
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2

Lithuania as a travel
destination



Lithuania and other Baltic countries are the least popular travel destinations compared to other countries included in the survey

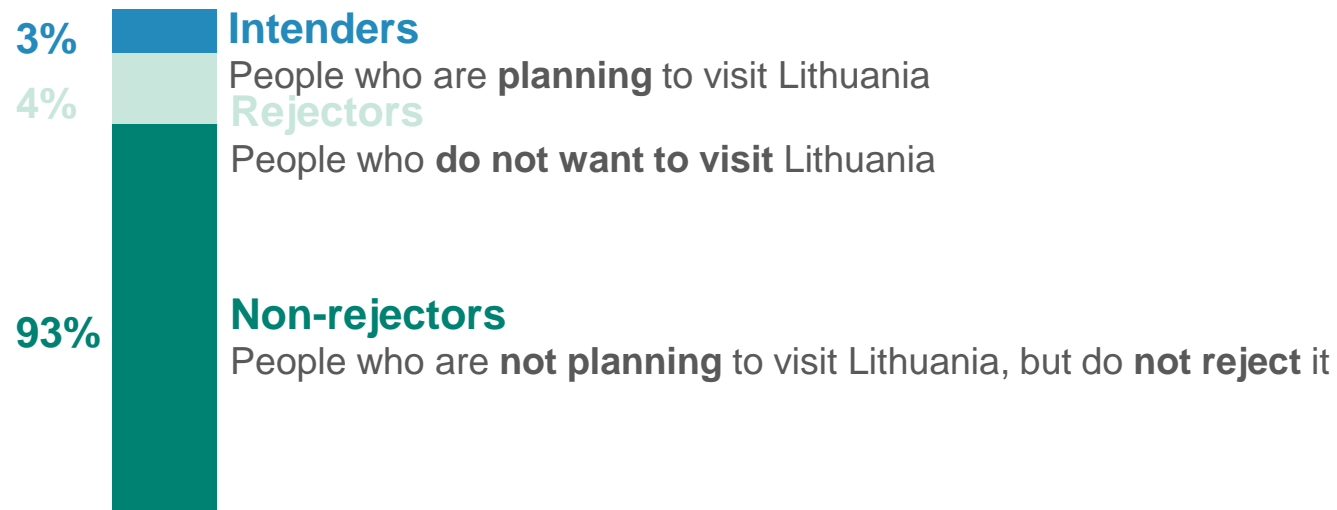
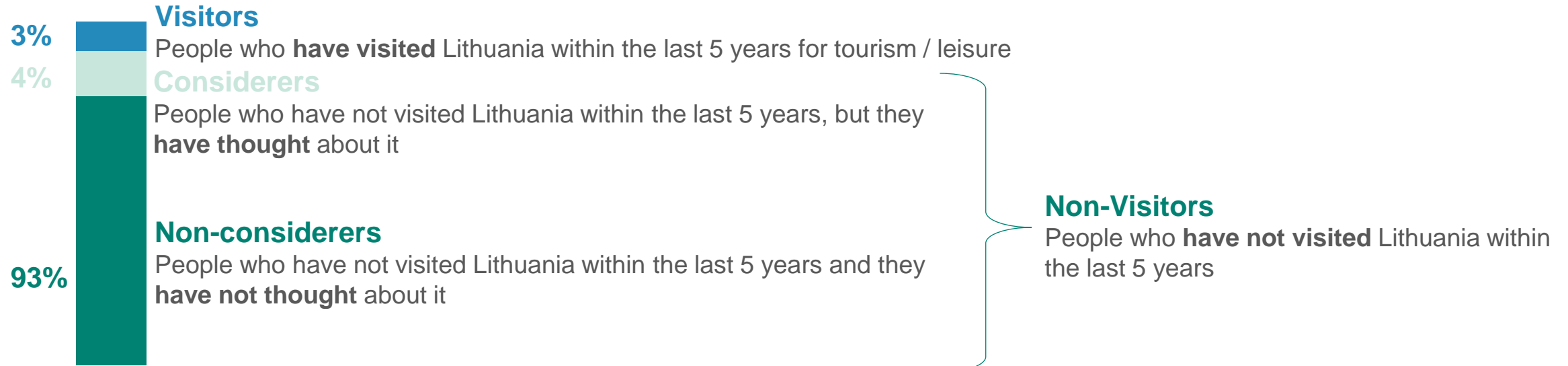


Which of the following countries have you ever travelled to for tourism / leisure? (multiple choice) Which of the following countries have you visited during last 5 years for tourism / leisure? (multiple choice)

Sample: All, N=1213



Types of respondents according to their attitude towards visiting Lithuania



Types of respondents. Demographic profile

Visitors

People who **have visited** Lithuania within last 5 years
N=31 (small sample)

Considerers

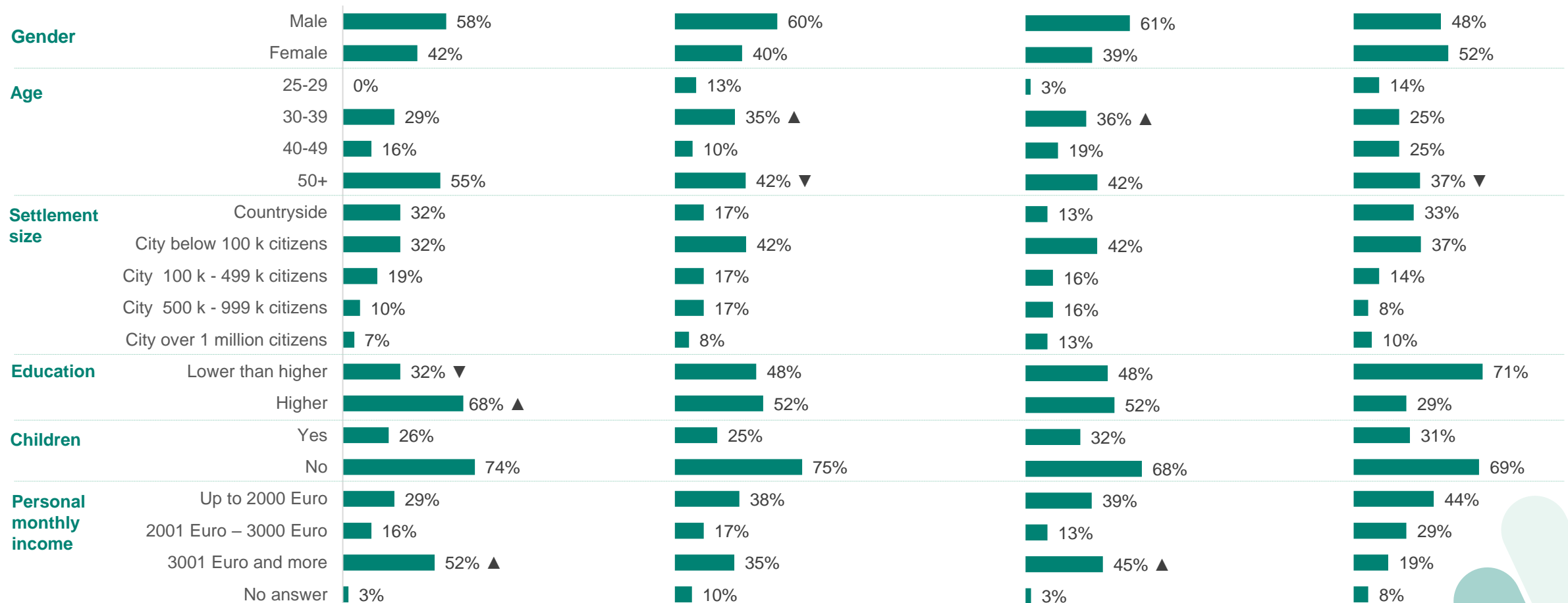
People who have not visited Lithuania within the last 5 years, but they **have thought** about it
N=48* (small sample)

Intenders

People who are **planning** to visit Lithuania
N=31* (small sample)

Rejectors

People who **do not want to visit** Lithuania
N=52



▼ Statistically significantly less
▲ Statistically significantly more

Types of respondents. Traveler profiles



Visitors

People who **have visited** Lithuania within the last 5 years
N=31* (small sample)



Considerers

People who have not visited Lithuania within last 5 years but **have thought** about it
N=48* (small sample)



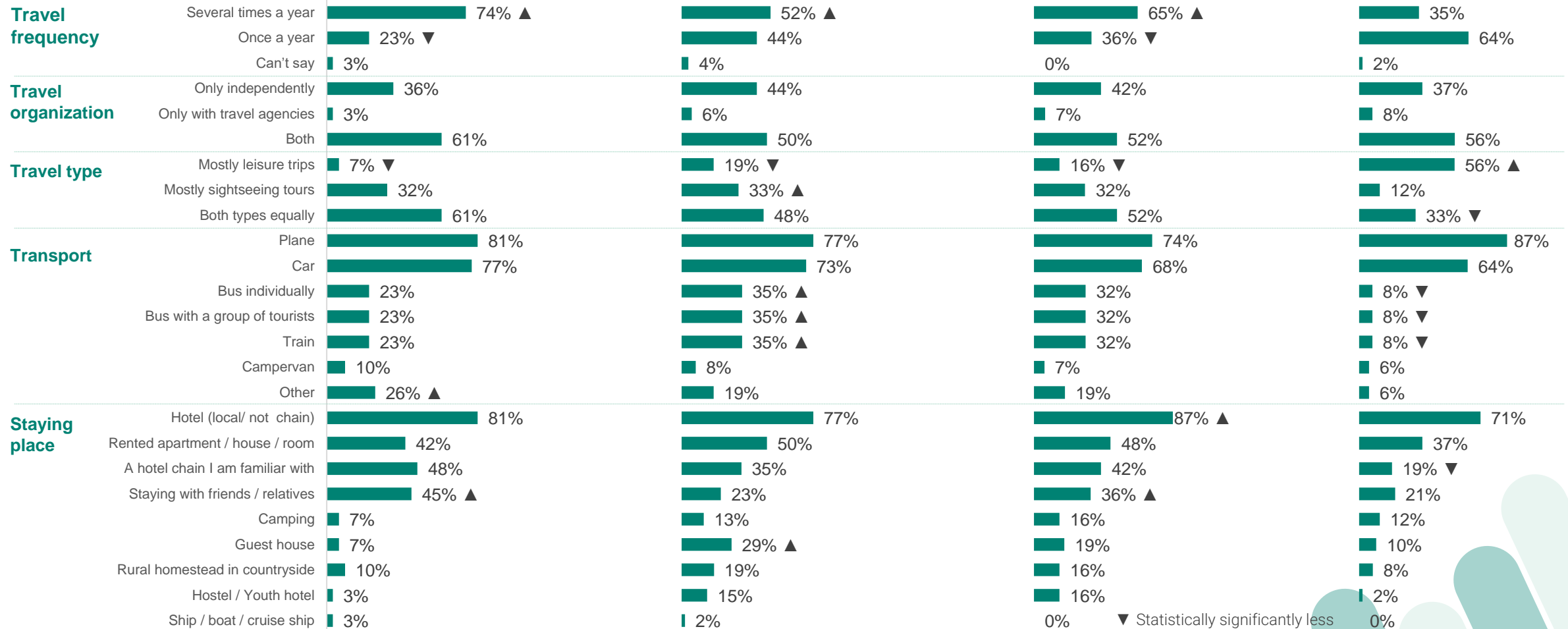
Intenders

People who are **planning** to visit Lithuania
N=31* (small sample)



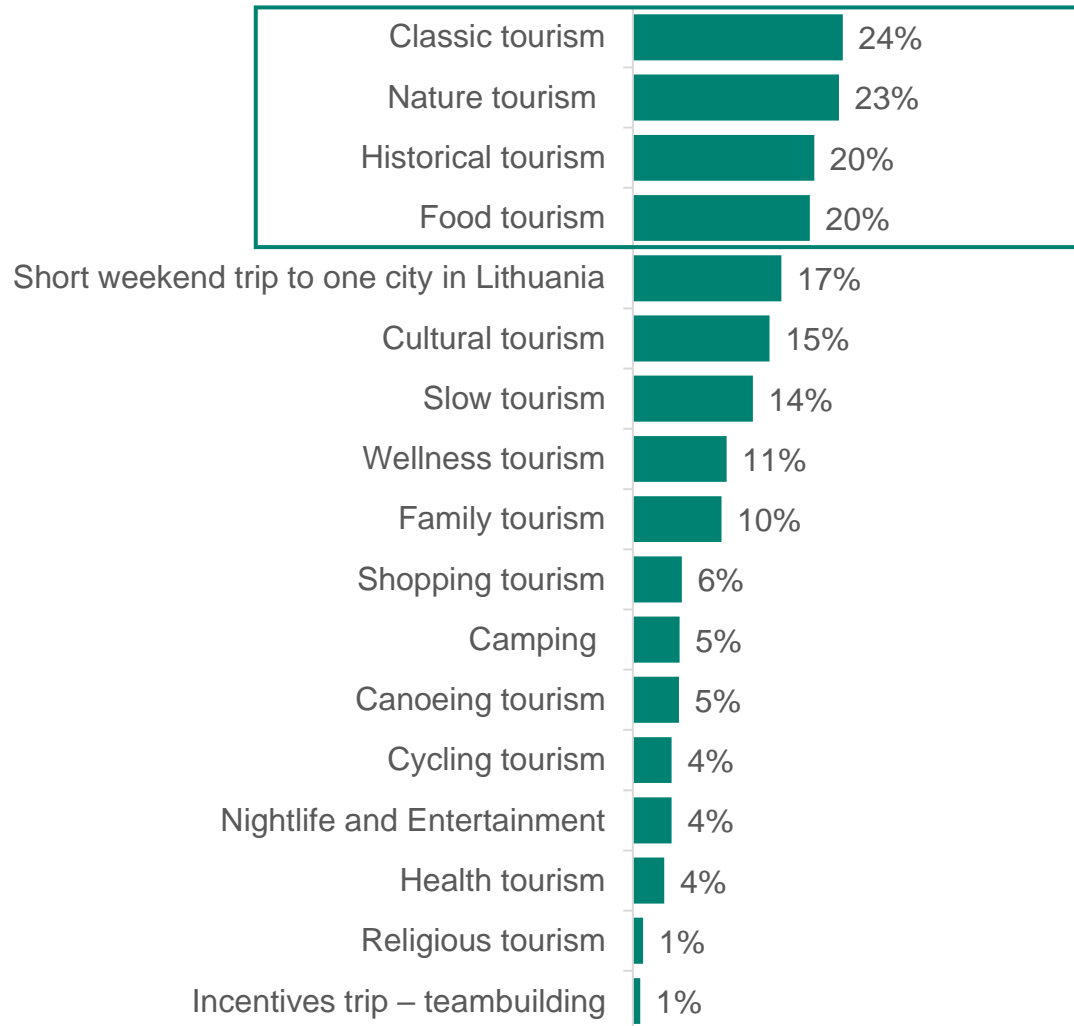
Rejectors

People who **do not want to visit** Lithuania
N=52



▼ Statistically significantly less
▲ Statistically significantly more

Classic and nature tourism are the preferred types of tourism in Lithuania



Sample: All, N=1213

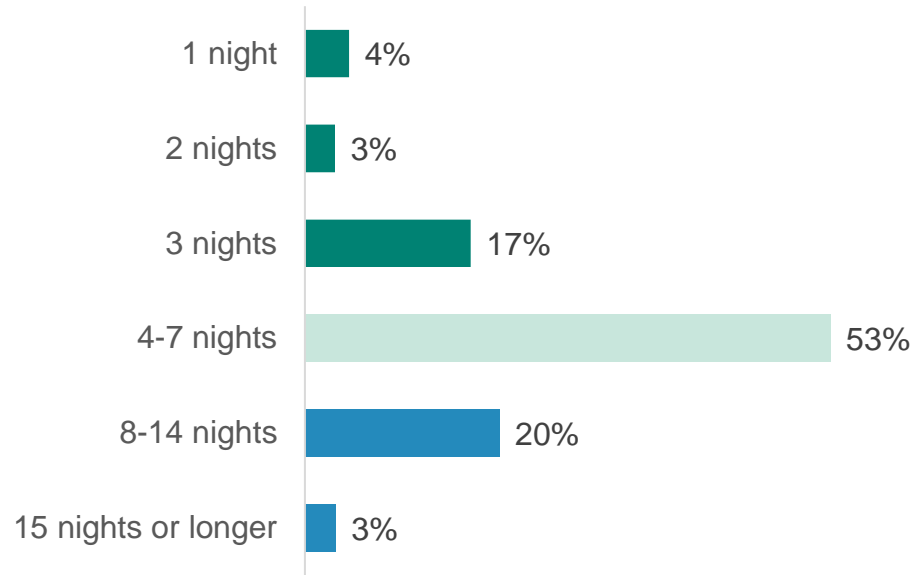
Which of the following types of tourism available in Lithuania would be most attractive for you? (multiple choice)

▼ Statistically significantly less

*small sample (n=40)

▲ Statistically significantly more

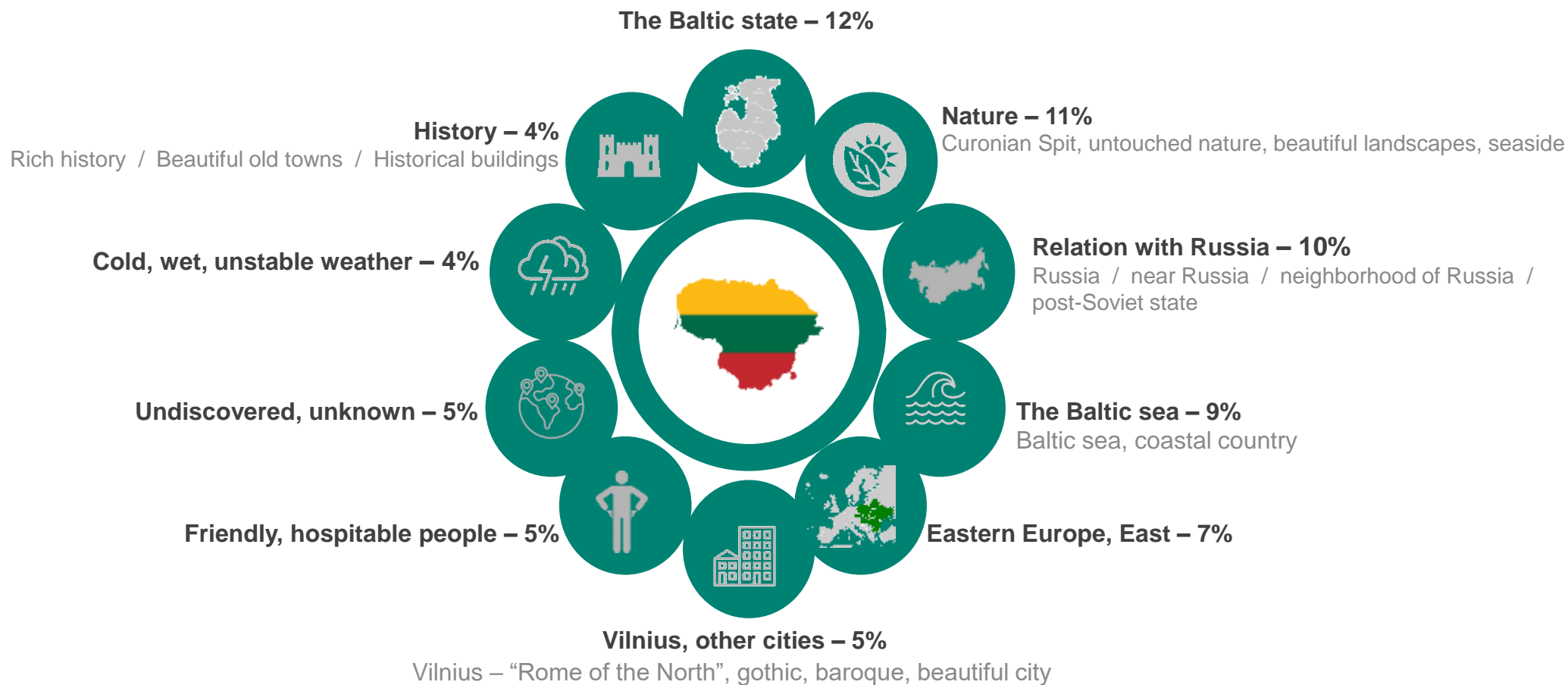
Optimal length of stay in Lithuania – 4-7 nights



Sample: All, N=1213

What would be the most optimal travel length to Lithuania for you? (single choice)

Spontaneously Lithuania is perceived as the Baltic country with beautiful nature and relations with Russia

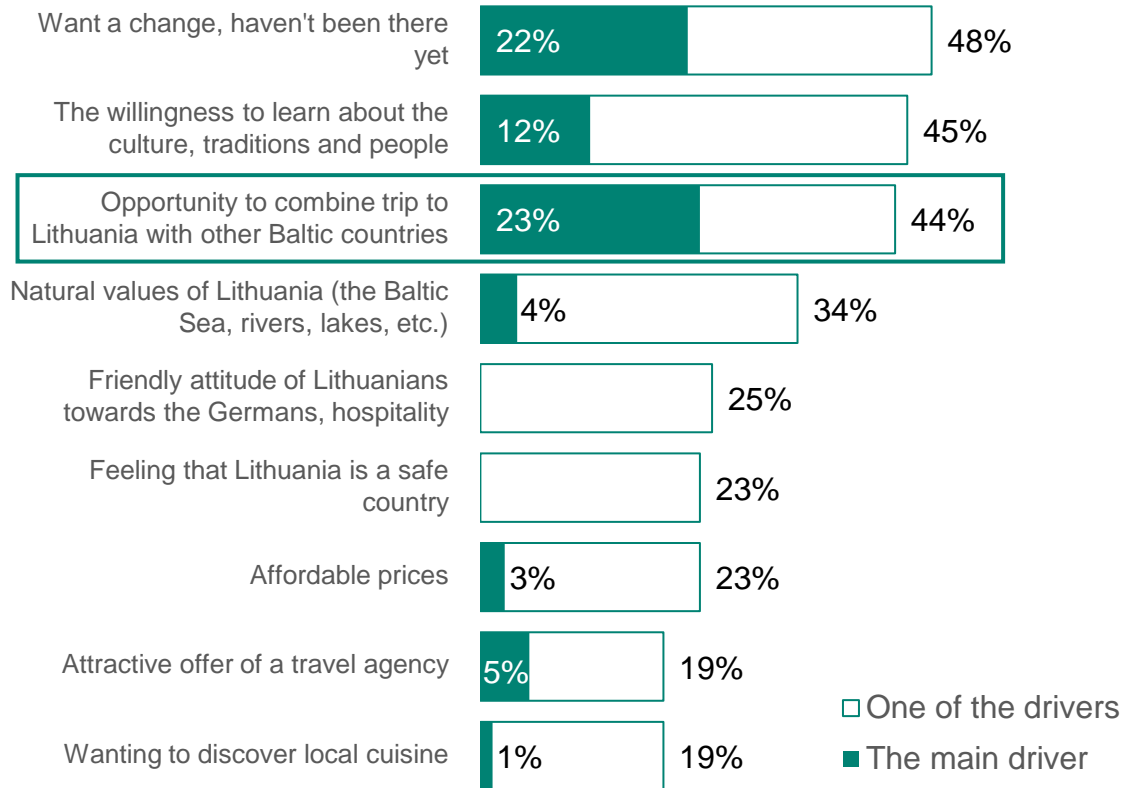


What do you associate Lithuania with? (spontaneous answers)

Sample: All, N=1213

Drivers to visit Lithuania – culture, nature, trio of the Baltic countries and affordable prices

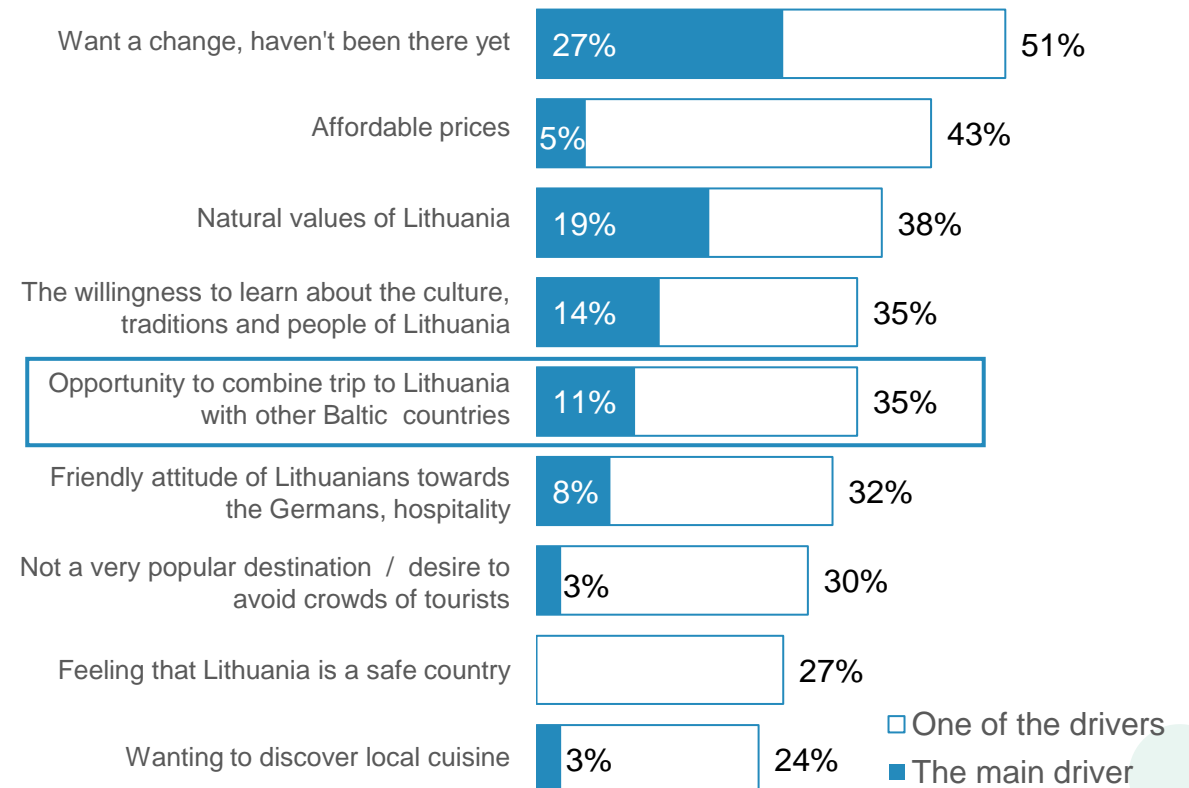
Lithuania Visitors



Sample: those who ever visited Lithuania, N=77

What made you decide / was the main factor to go to Lithuania as a tourist? (multiple / single choice)

Lithuania Intenders / Considerers

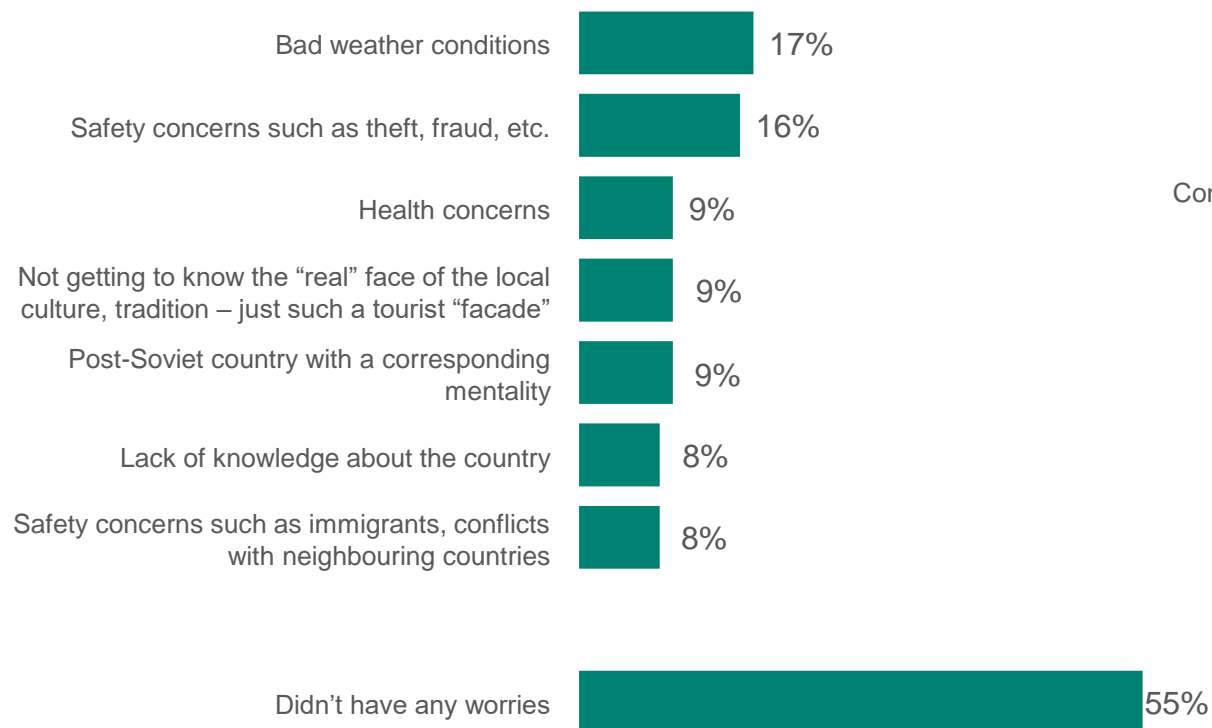


Sample: those who intend to visit Lithuania, N=37* (small sample)

What made you start / was the main factor to consider travelling to Lithuania? (multiple / single choice)

There are no major concerns related with the travel to Lithuania

Lithuania Visitors



Sample: those who ever visited Lithuania, N=77

Was there anything you were worried about before travelling to Lithuania? (multiple choice)

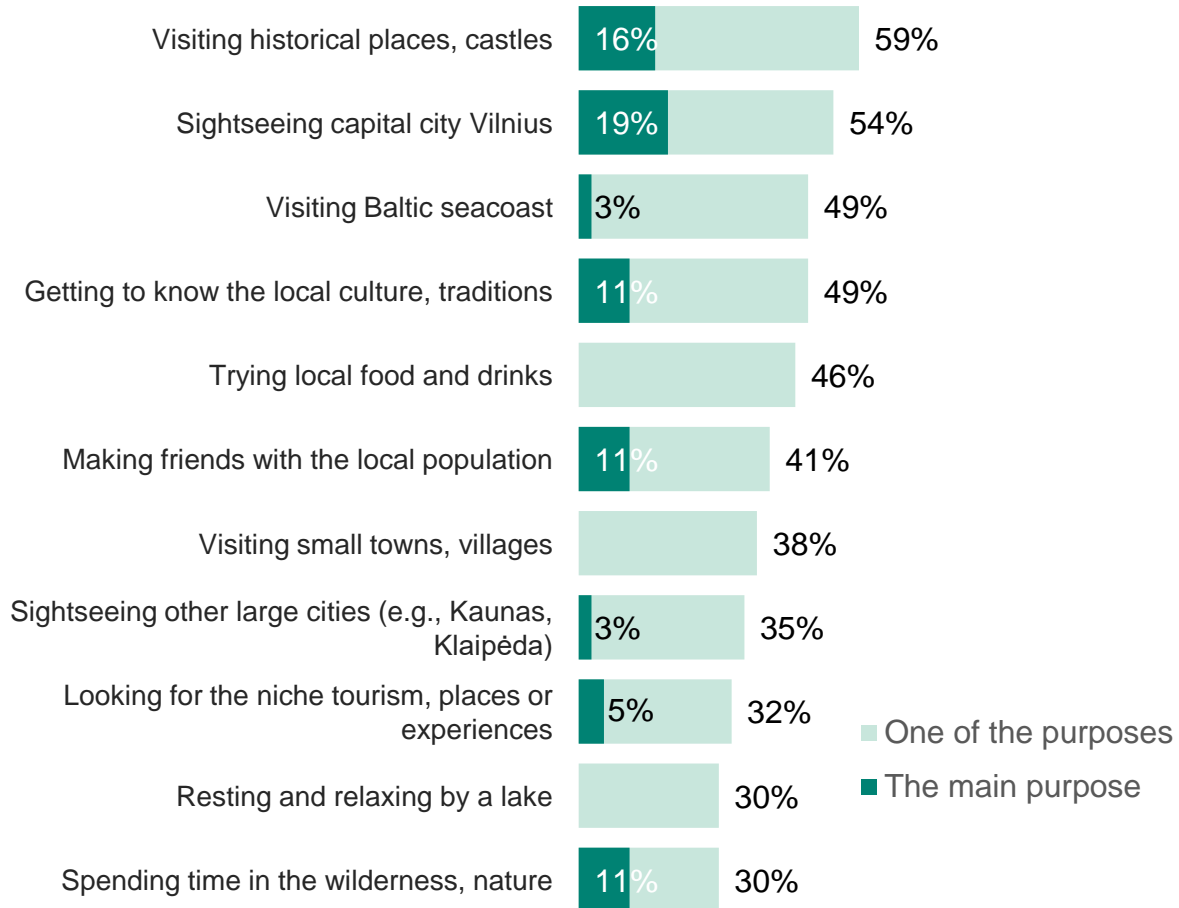
Lithuania Intenders / Considerers



Sample: those who consider or intend to visit Lithuania, N=37 (small sample)

Why haven't you been to Lithuania yet, even though you have considered or are planning such a trip? (multiple choice)

History and culture, seacoast and meeting local people are important points of attraction for future visitors



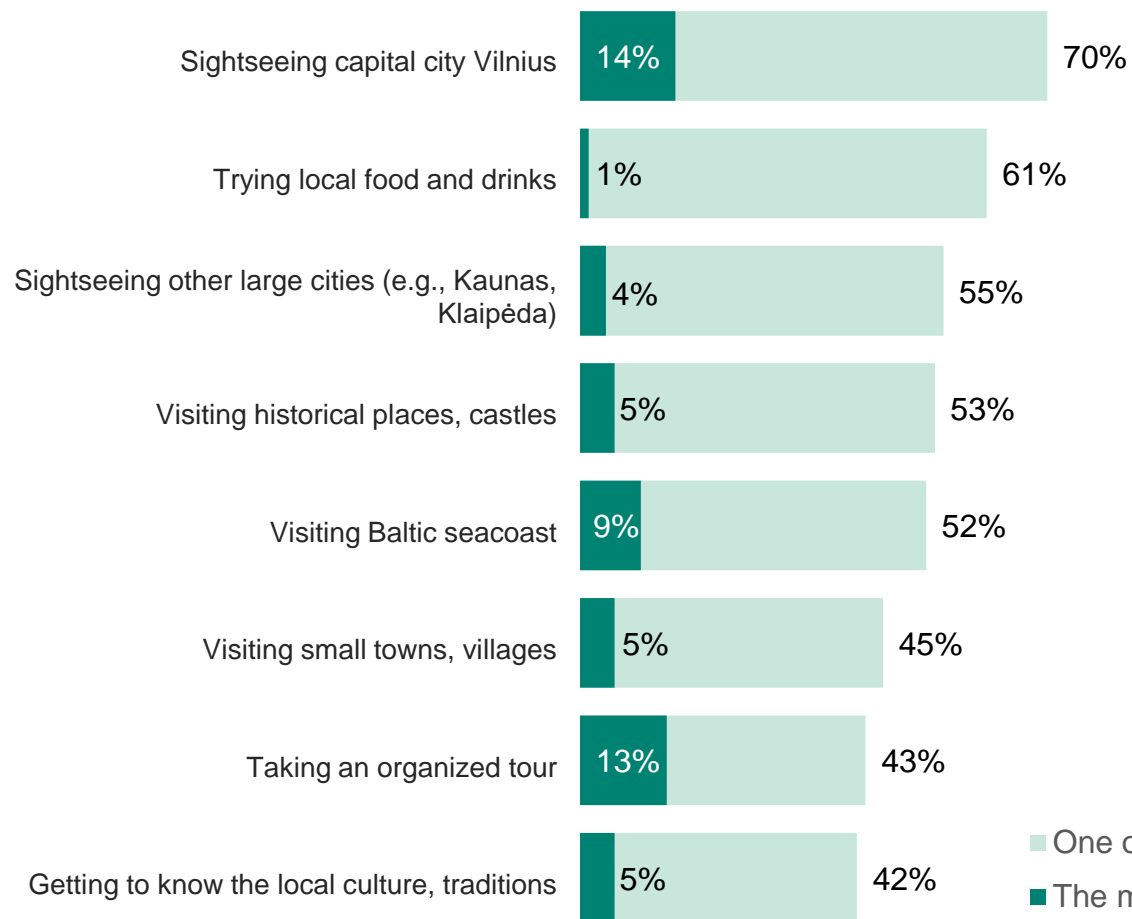
The main purposes to travel to Lithuania



Sample: those who consider or intend to visit Lithuania, N=37* (small sample)

What was or is the purpose of your planned tourist trip to Lithuania? (multiple choice) Which was the main purpose? (single choice)

Sightseeing in the cities and tasting the local cuisine were the key activities for previous visitors



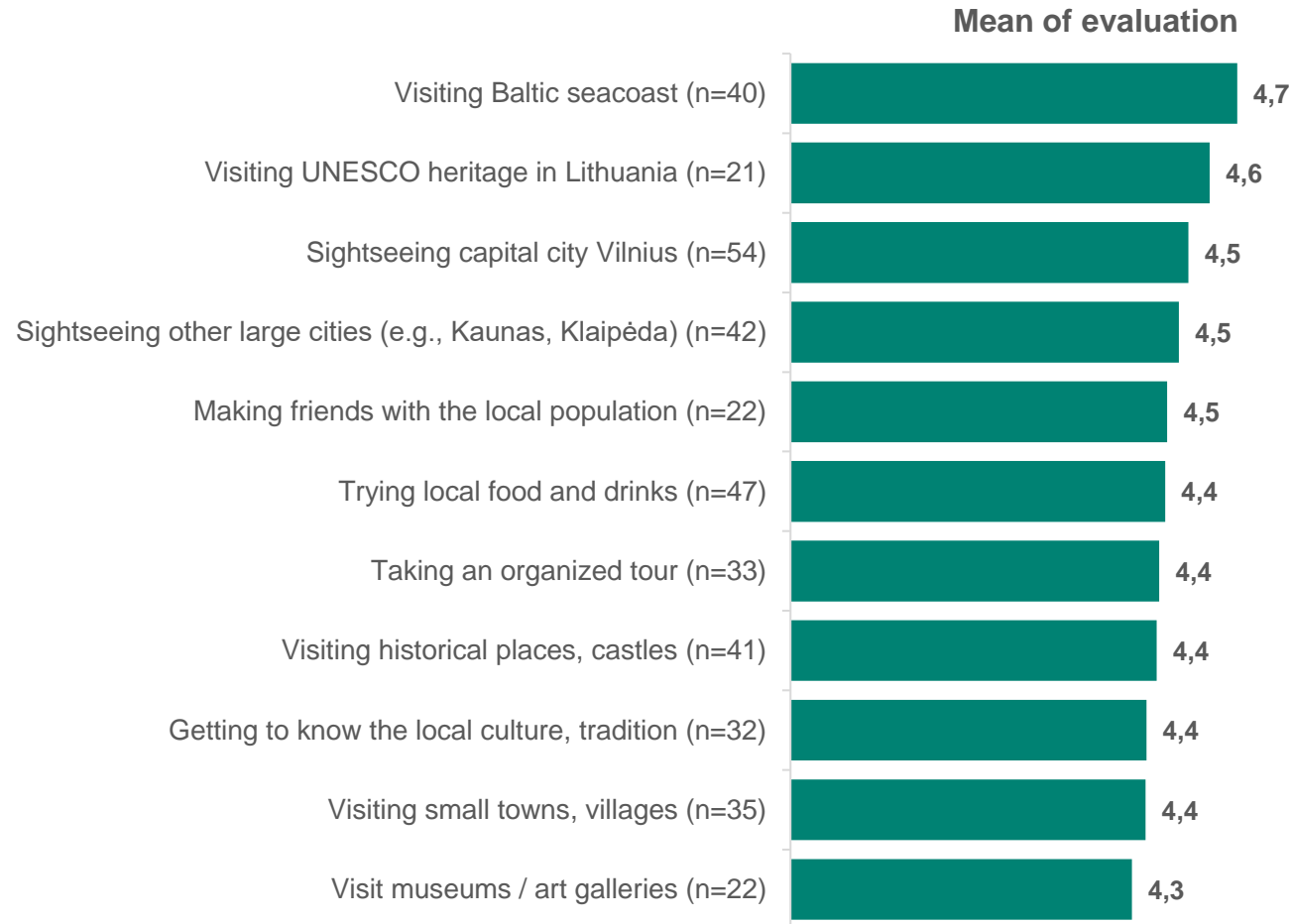
The main activities in Lithuania



Sample: those who ever visited Lithuania, N=77

Which of the following activities did you participate in during your tourist trip to Lithuania? (multiple choice) Which of these activities was your main activity, in which you participated most often during your travel to Lithuania? (single choice)

Visitors mostly enjoyed the seacoast and sightseeing historical heritage in the largest cities of Lithuania



Sample: those who participated in certain activity (number is indicated along each activity)

How much did you enjoy this activity? Please use the 5-point scale where 1 means “I didn’t like it at all” and 5 means “I like it very much”.

Main conclusions and recommendations



Potential number of German tourists in Lithuania

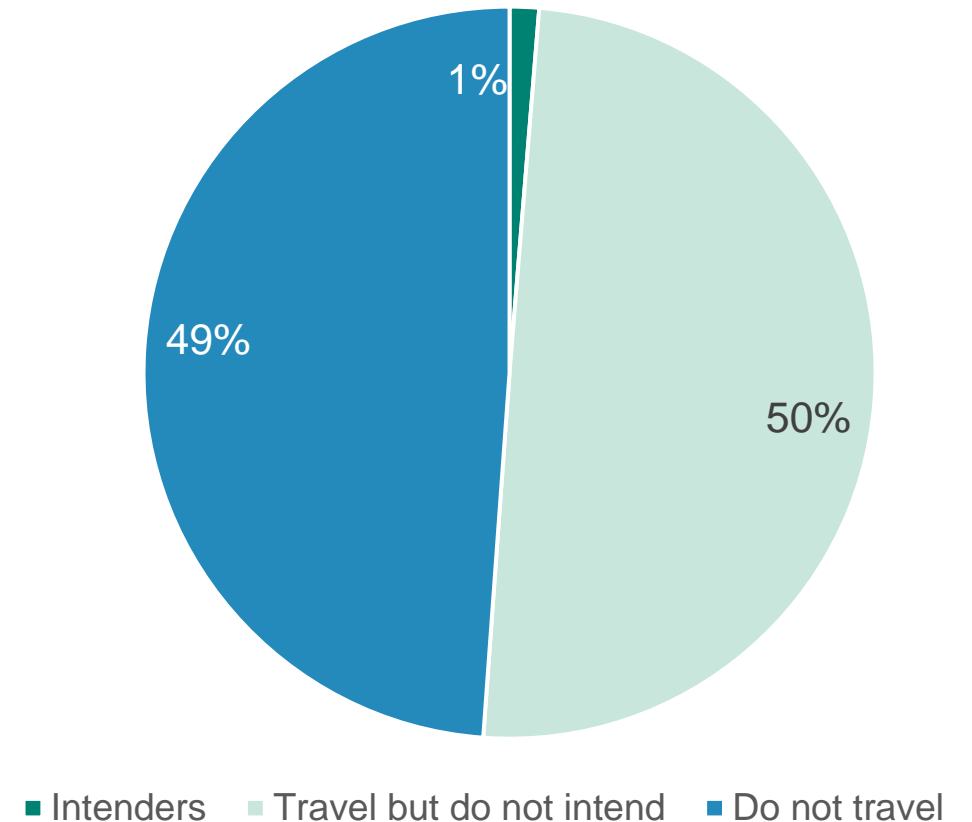
The number of 25+ y. o. Germans: **63,25** million
(<https://www.statista.com/statistics/454349/population-by-age-group-germany/>)

According to the survey, 49% of them travel abroad at least once a year: 31 million

2,6% of them intend to visit Lithuania:
792 thousands of German travelers

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From 25+ y. o. residents of Germany



How to attract travelers from Germany to visit Lithuania?

Improve awareness of Lithuania as a country worth visiting

- **Lithuania** is not the top choice country among Germans. Therefore, **clear message about Lithuania's uniqueness should be demonstrated**, like Baltic heritage and cultural aspects.
- Present a trip to Lithuania as **safe and worry-free**. Peace, relaxation and comfort are very important to them.

Show opportunities to learn about the local culture and history within a relaxed schedule

- **Germans take time to get to know the country they visit well**. This time should be filled with discovering the **UNESCO heritage, food, culture and history** of Lithuania.
- Germans would love **making friends with the locals**. This shows the importance of true local experience for them.
- They love **traveling by car**. Information about **good road infrastructure** and combining a trip among **all three Baltic countries** can be attractive.

Present seaside and other waterfront relaxation opportunities

- Germans appear to be particularly interested in the **Baltic seaside, the Curonian Spit, amber goods**. German travelers also **enjoy spending time by the lake**. This possibility could be more apparent within communication about Lithuania.
- German travelers associate Lithuania with **cleanliness**. It is worth to communicate about Lithuania's Blue Flags seaside locations and meeting high environmental standards.



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