



Outbound tourism review. United Kingdom

May 2022



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TRAVEL



Kuriame
Lietuvos ateitį

2014–2020 metų
Europos Sąjungos
fondų investicijų
veiksmų programa

Study objectives and design

Research country – United Kingdom.

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 – 3 focus groups in the UK (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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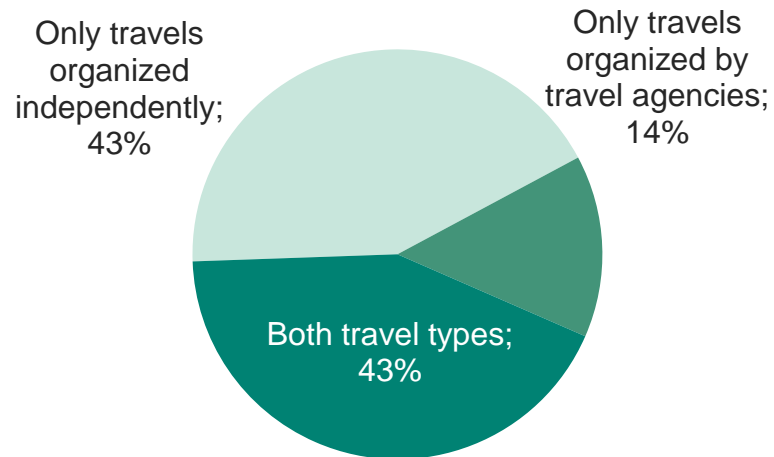
Travel and tourism
market at a glance

1



Most British travelers prefer independently organized trips and leisure trips

Travel organization

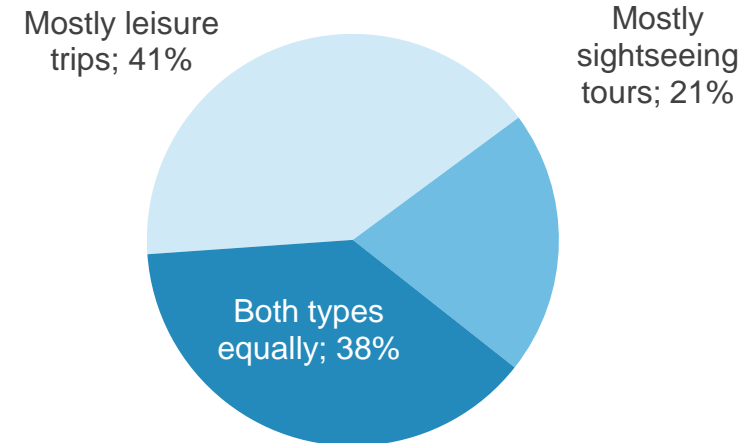


86% organize trip by themselves

57% use services of travel agencies

How do you travel abroad? (single choice)

Preferred type of trip



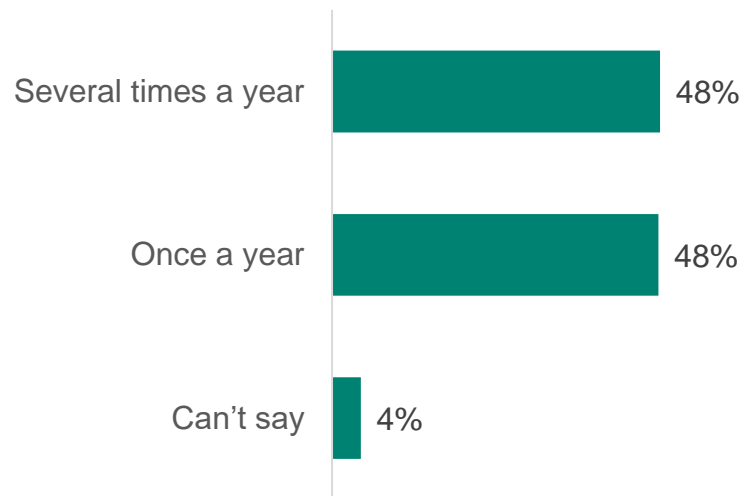
79% like leisure trips

59% like sightseeing tours

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

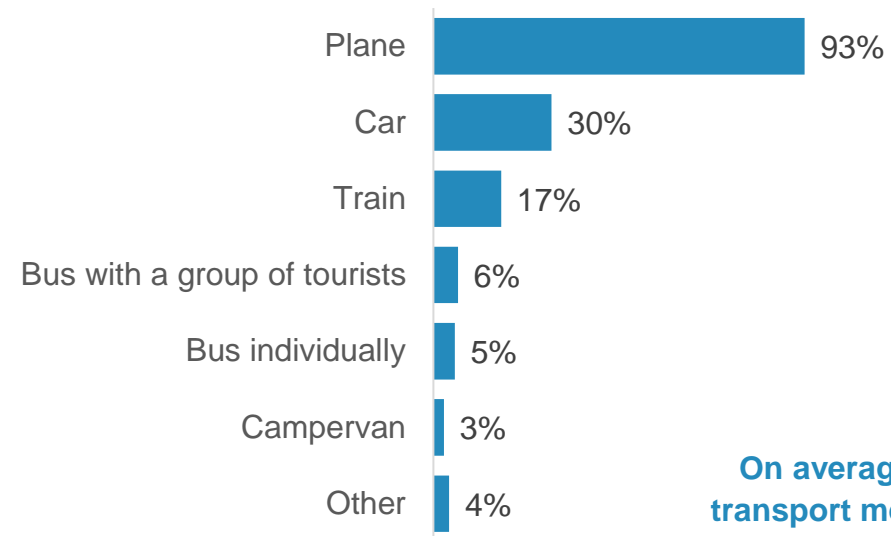
Direct flights from UK to Lithuania are necessary

Travel frequency



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

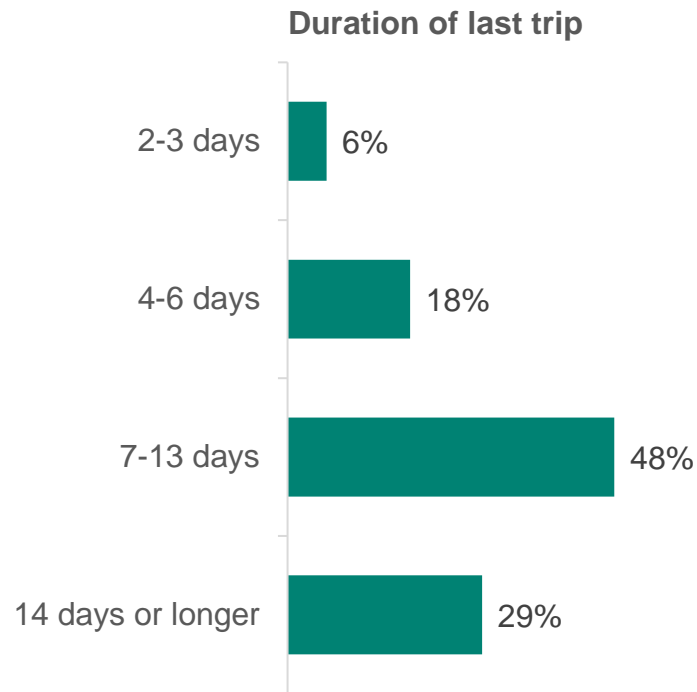
Travel transport



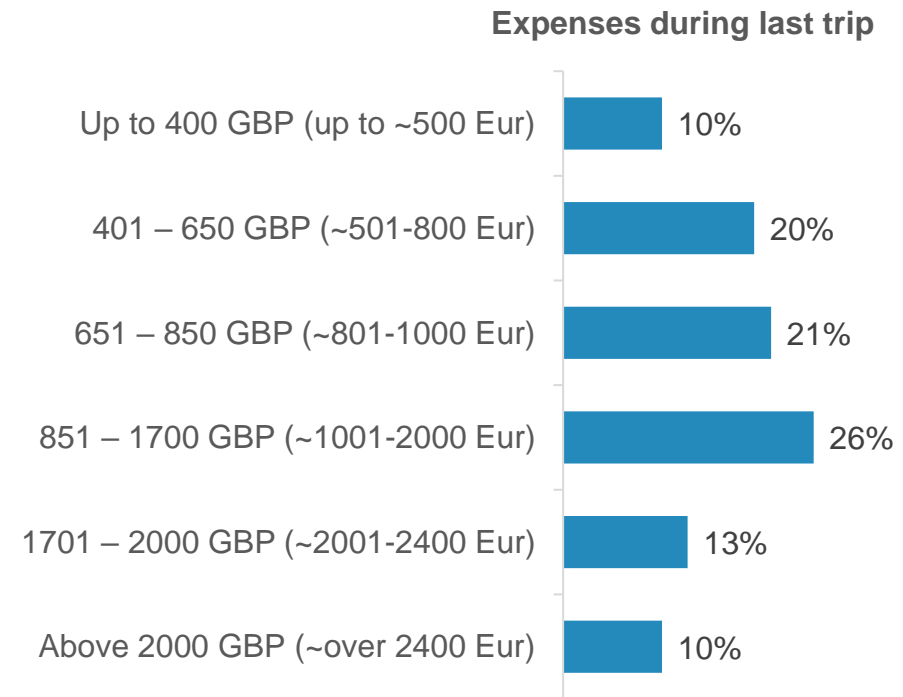
Which means of transport do you usually choose for travelling abroad? (multiple choice)

On average **1.6** types of transport means are chosen.

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



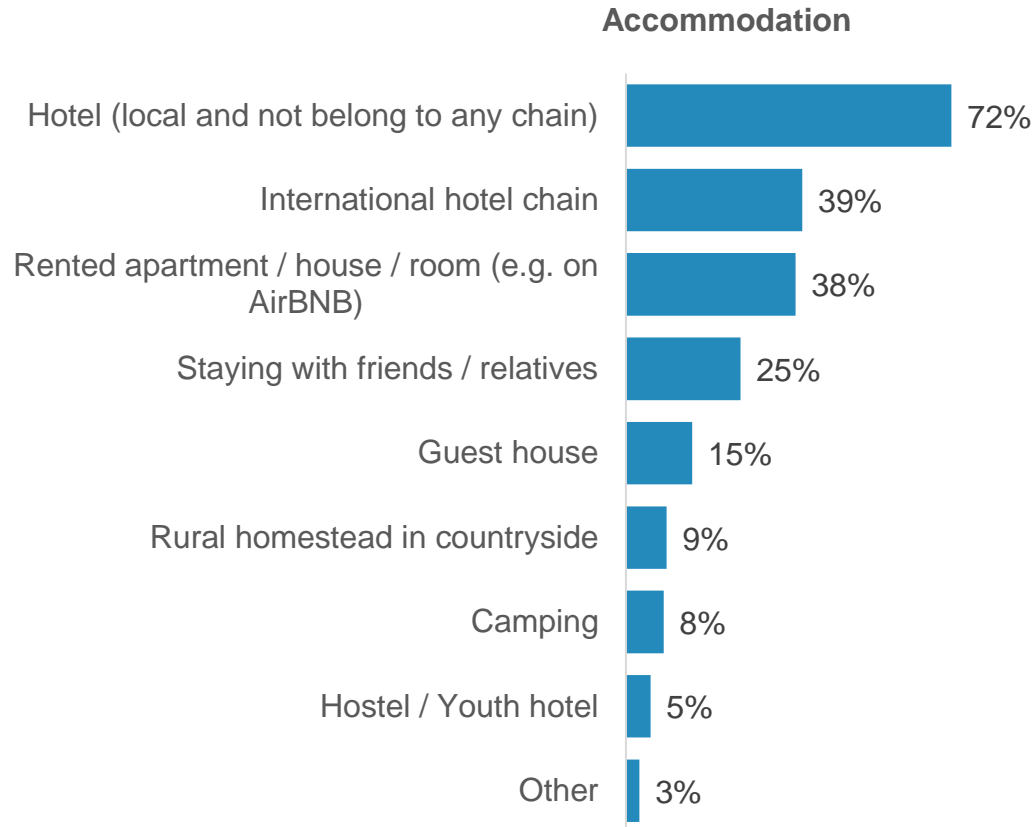
How long was your last abroad travel for tourism? (single choice)



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

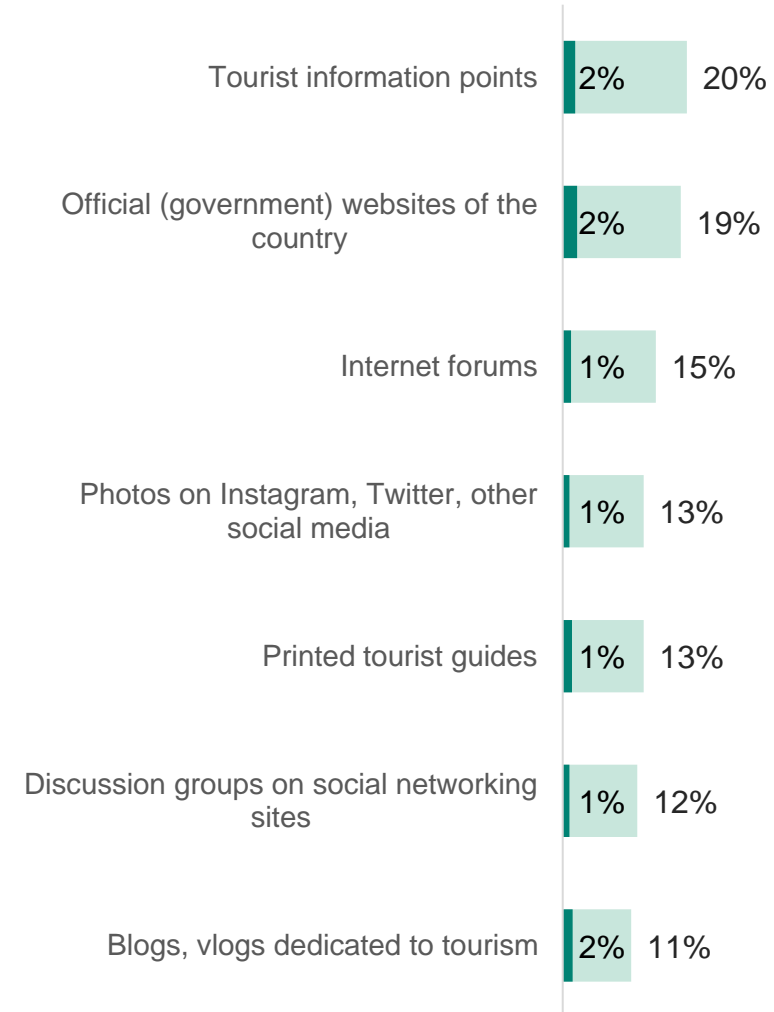
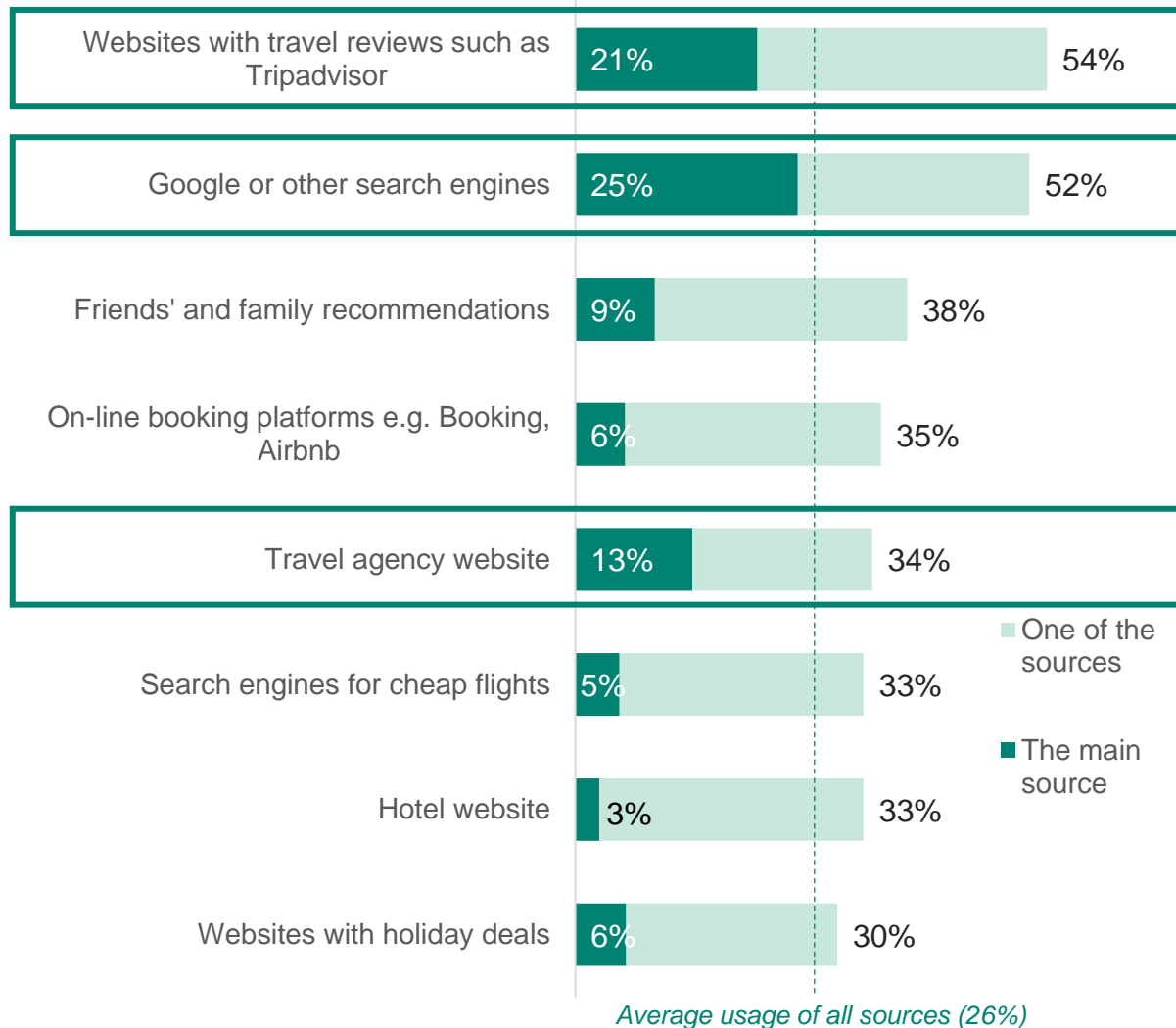
On average **2** stay types are chosen.



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

Sources of information

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



Sample: All, N=1210

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)

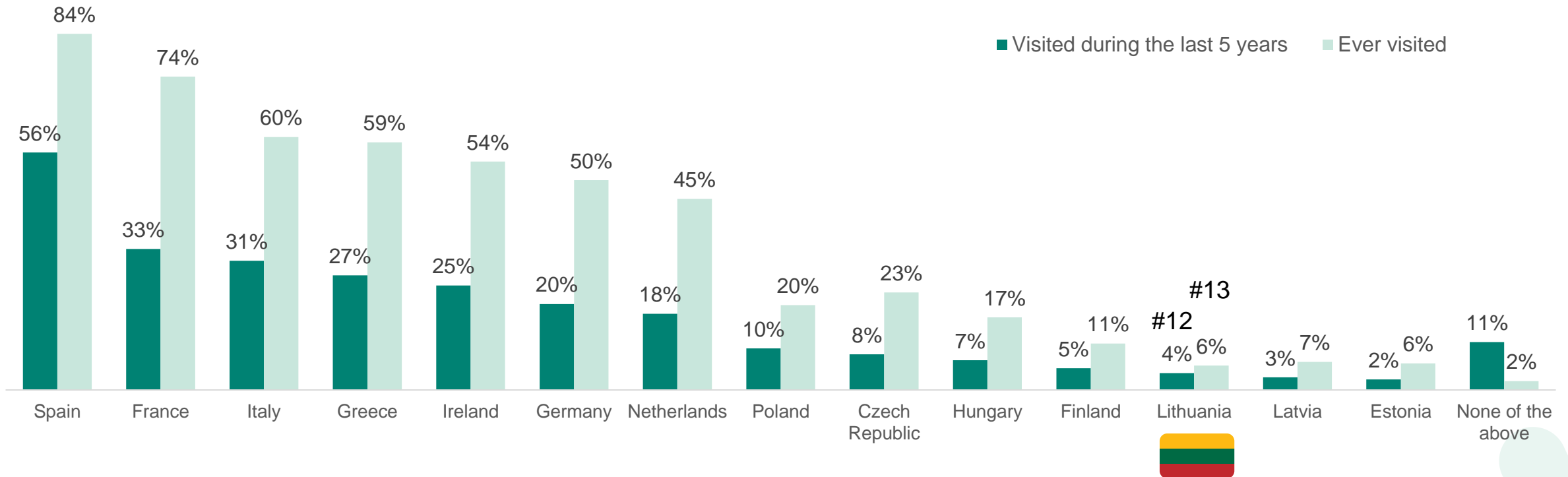
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Lithuania as a travel
destination

2



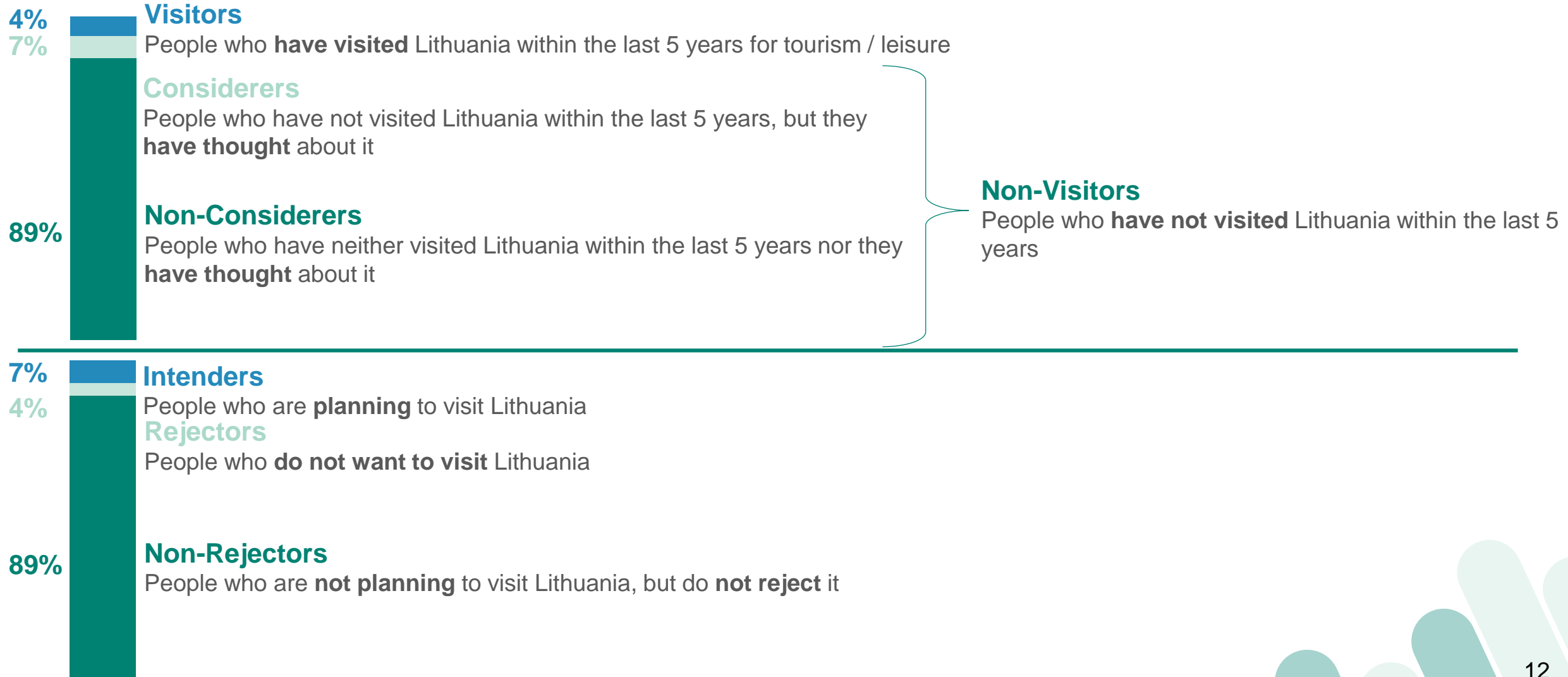
Lithuania and other Baltic states are the least popular travel destinations compared to other countries included in the survey



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=1210

Types of respondents according to their attitude towards visiting Lithuania



Types of respondents. Demographic profile

Visitors

People who **have visited** Lithuania within the last 5 years
N=48 (small sample size)



Considerers

People who have not visited Lithuania within the last 5 years, but they **have thought** about it
N=85



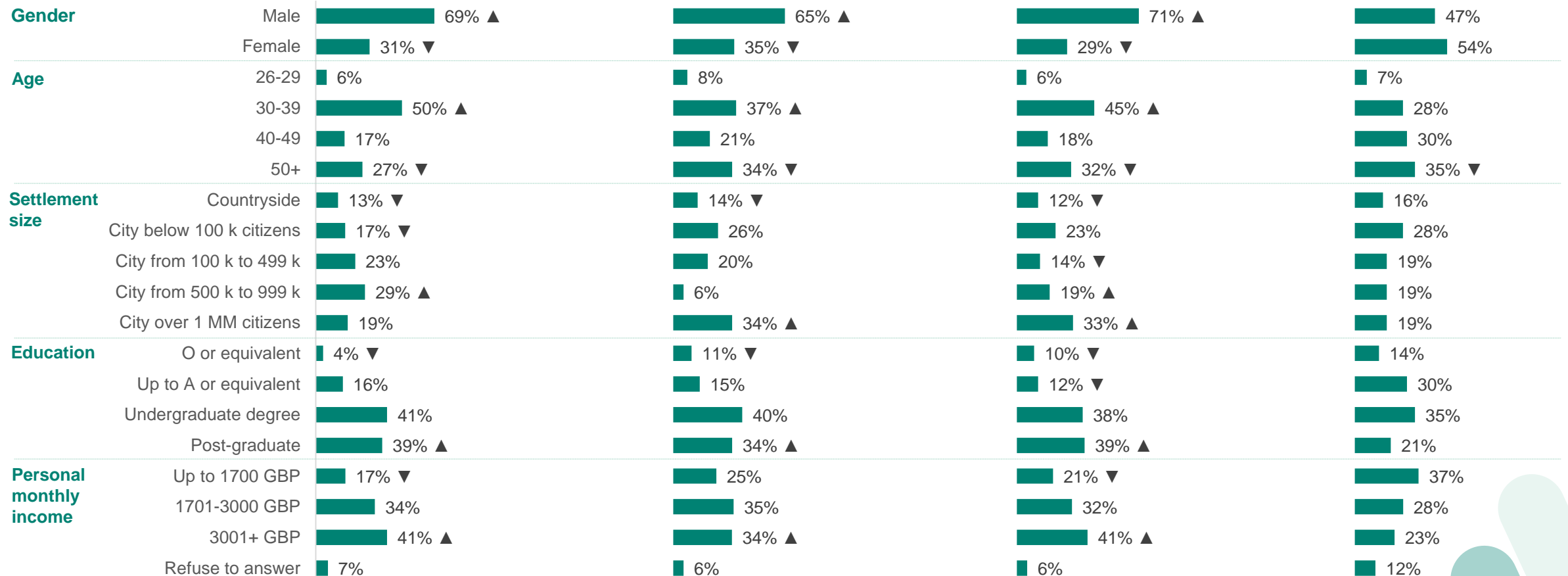
Intenders

People who are **planning** to visit Lithuania
N=89



Rejectors

People who **do not want to visit** Lithuania
N=43 (small sample size)



▼ Statistically significantly less
▲ Statistically significantly more

Types of respondents. Traveler profile

Visitors

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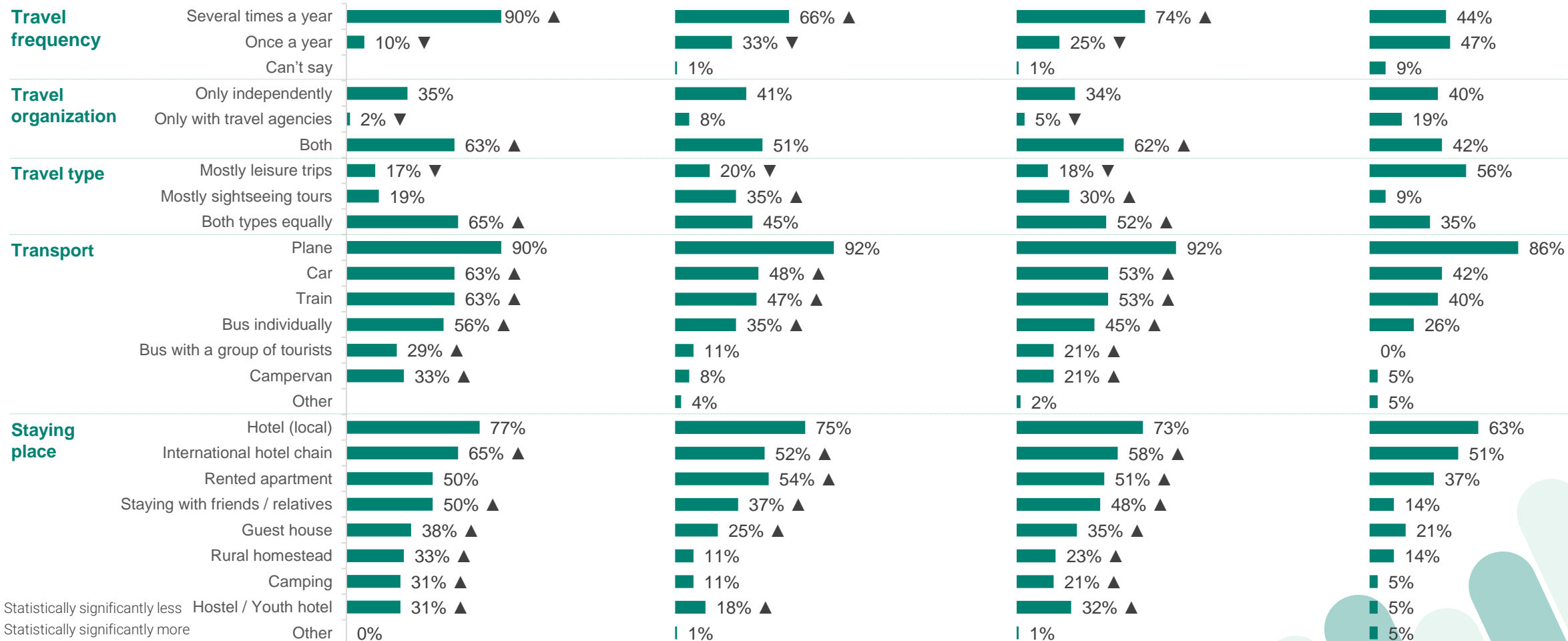
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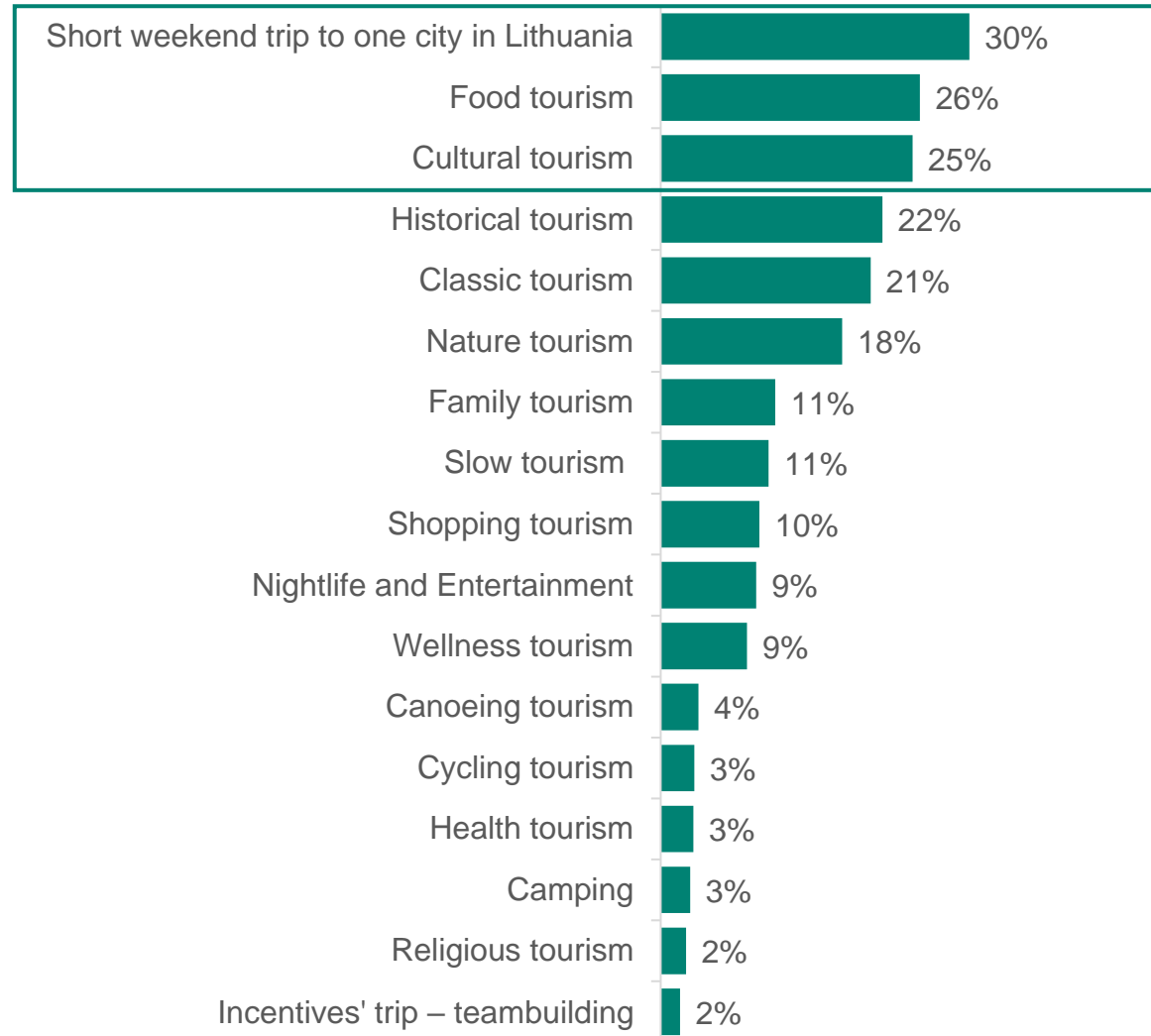
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▼ Statistically significantly less
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British travelers mainly see Lithuania as a country for a short weekend trip

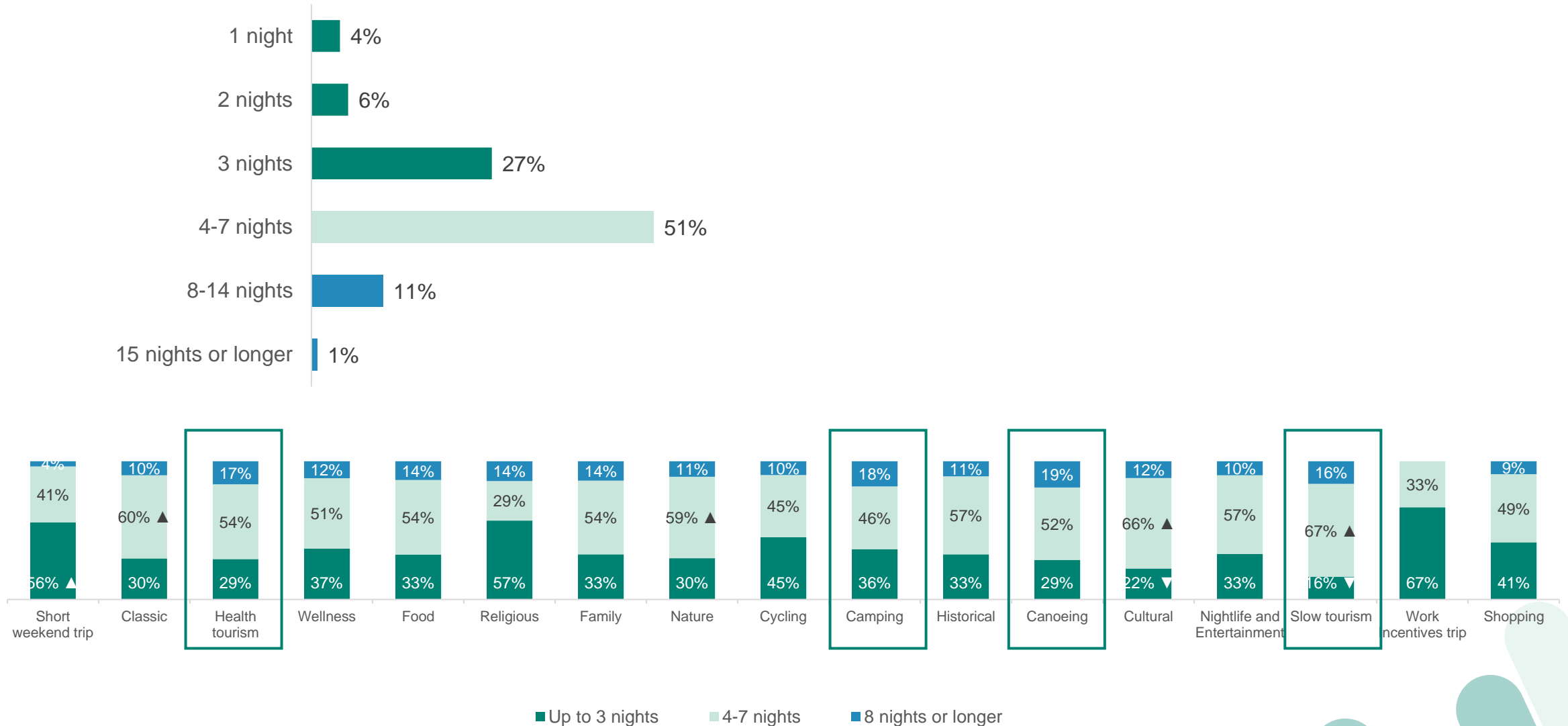


Sample: All, N=1210

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

▼ Statistically significantly less
▲ Statistically significantly more

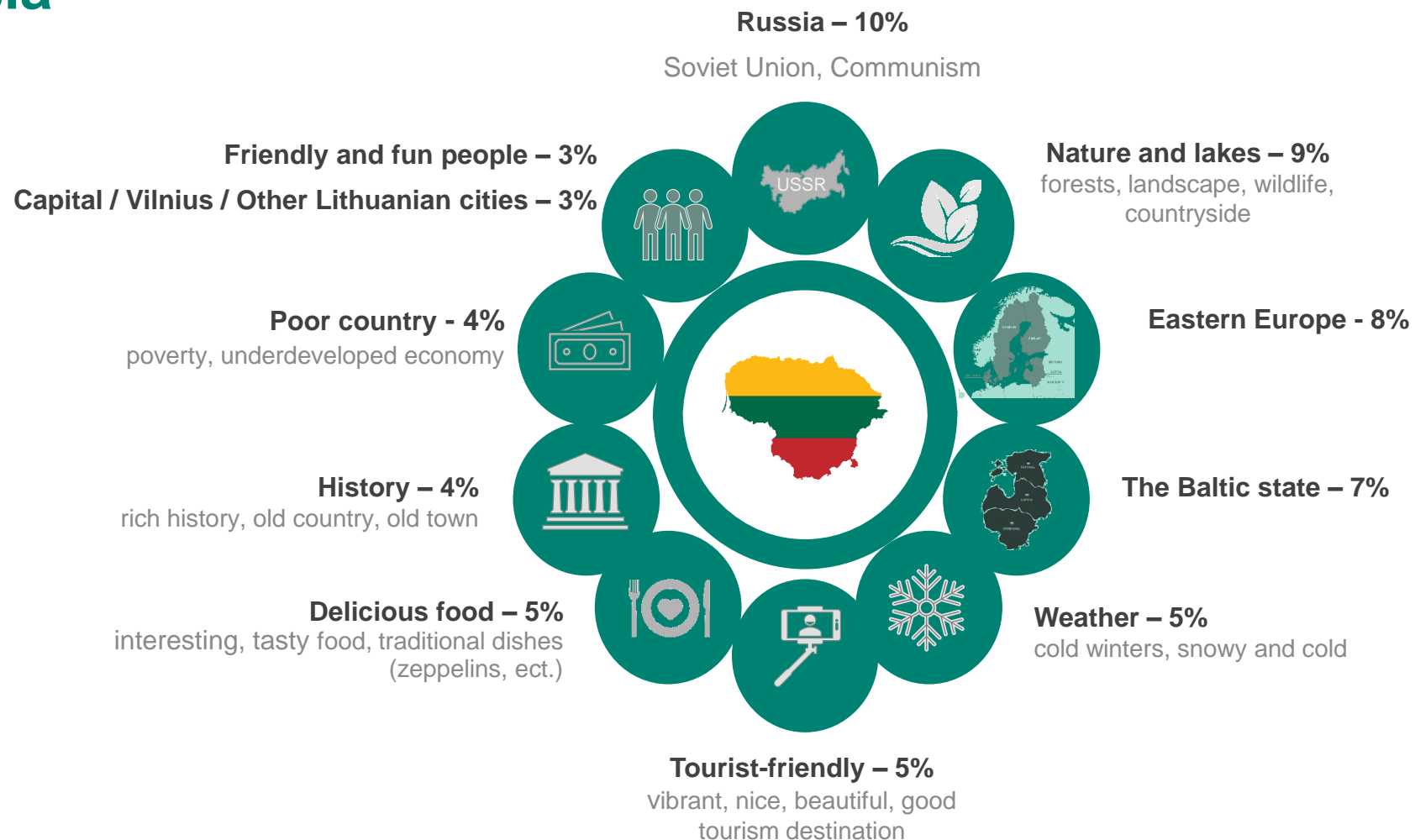
Optimal length of stay in Lithuania – 4-7 nights



Sample: All, N=1210

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

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

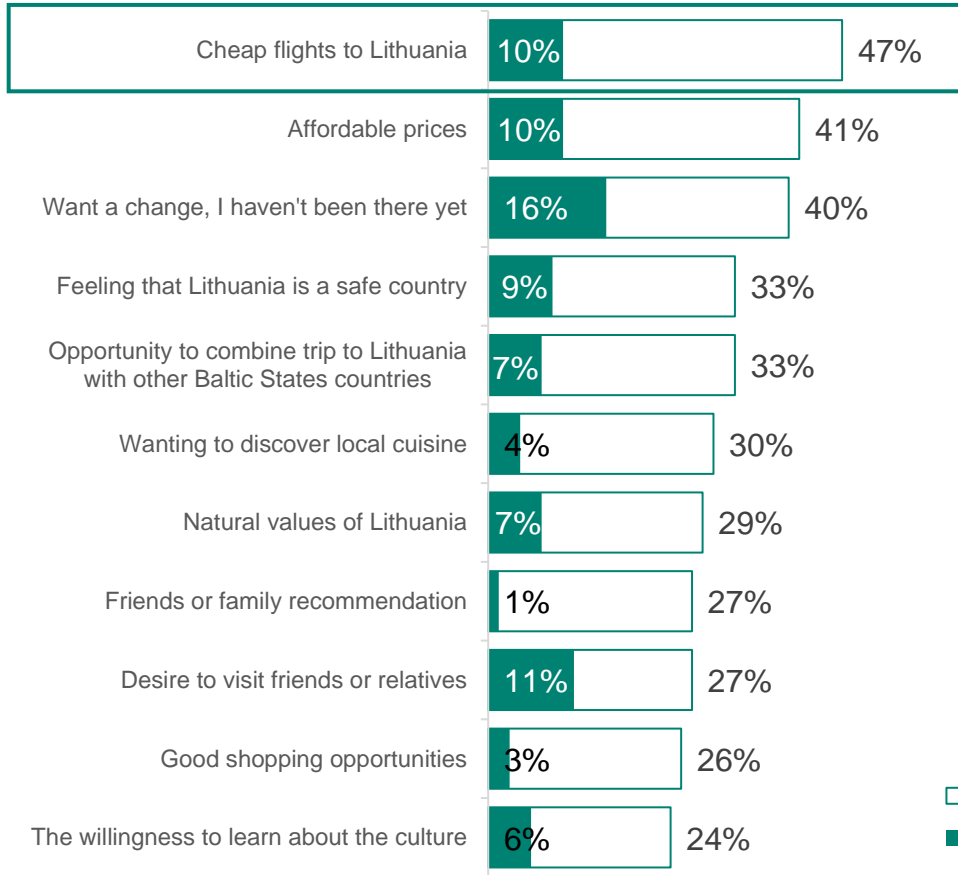


What do you associate Lithuania with? (spontaneous answers)

Sample: All, N=1210

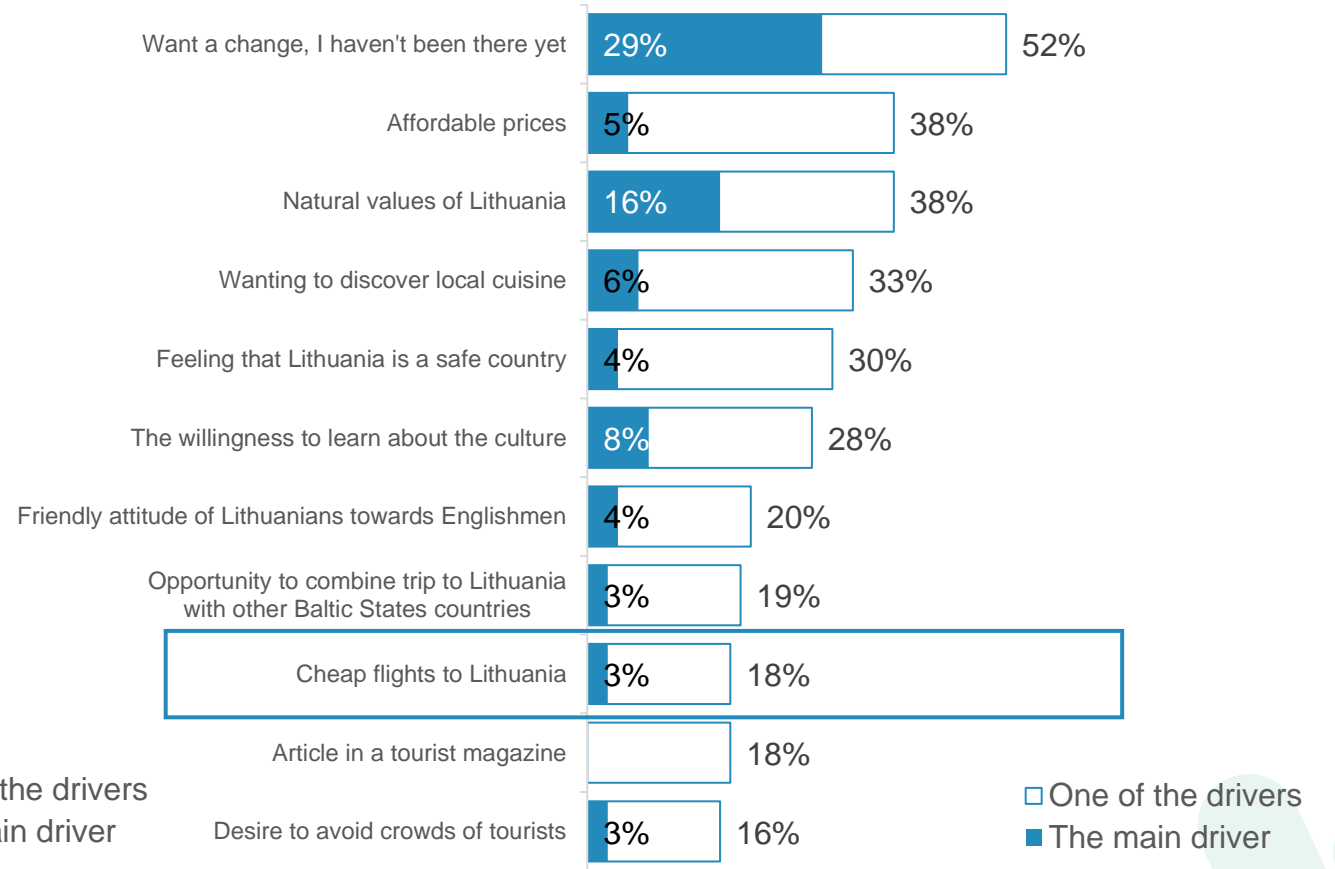
Drivers to visit Lithuania. Cheap flights work as a trigger to come

Lithuania Visitors



What made you decide / was the main factor to go to Lithuania as a tourist? (multiple / single choice)
 Sample: those who ever visited Lithuania, N=70 (small sample size)

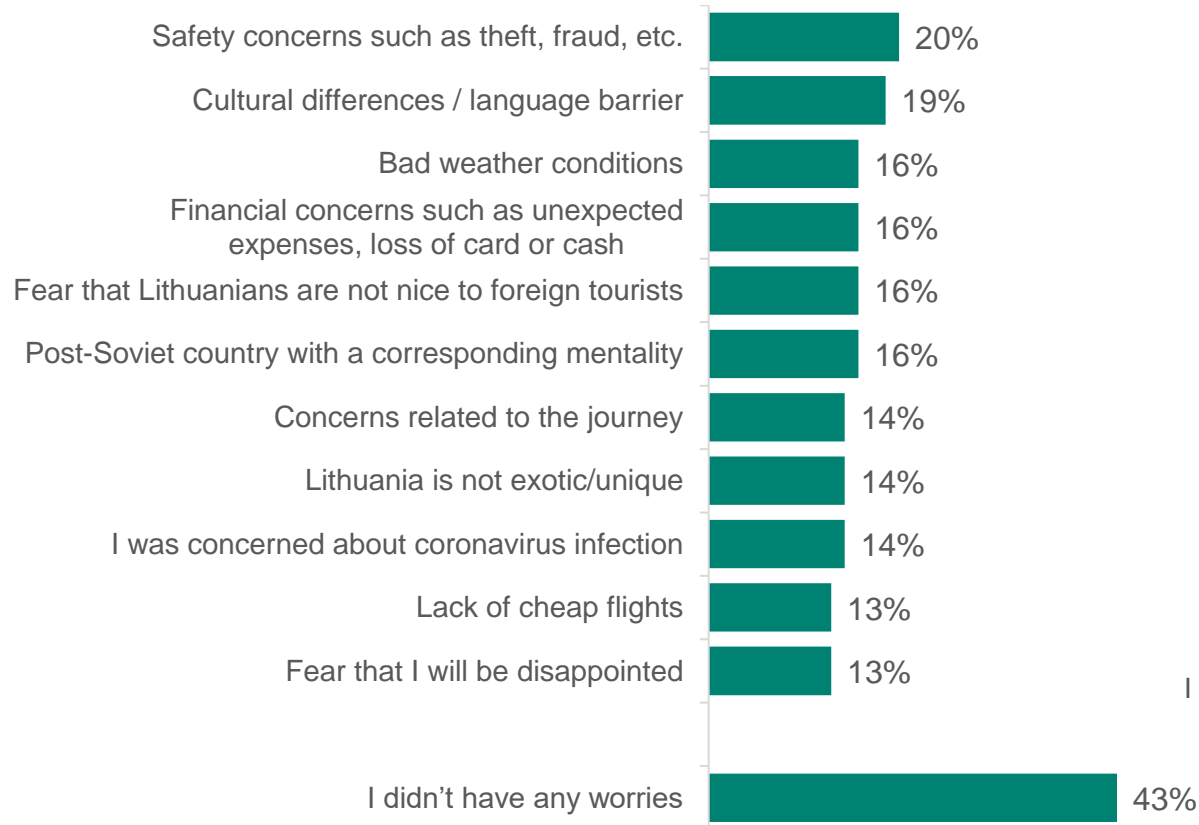
Lithuania Intenders / Considerers



What made you start / was the main factor to consider travelling to Lithuania? (multiple / single choice)
 Sample: those who intend to visit Lithuania, N=79 (small sample size)

Personal safety and language barrier were the main concerns prior to visiting Lithuania

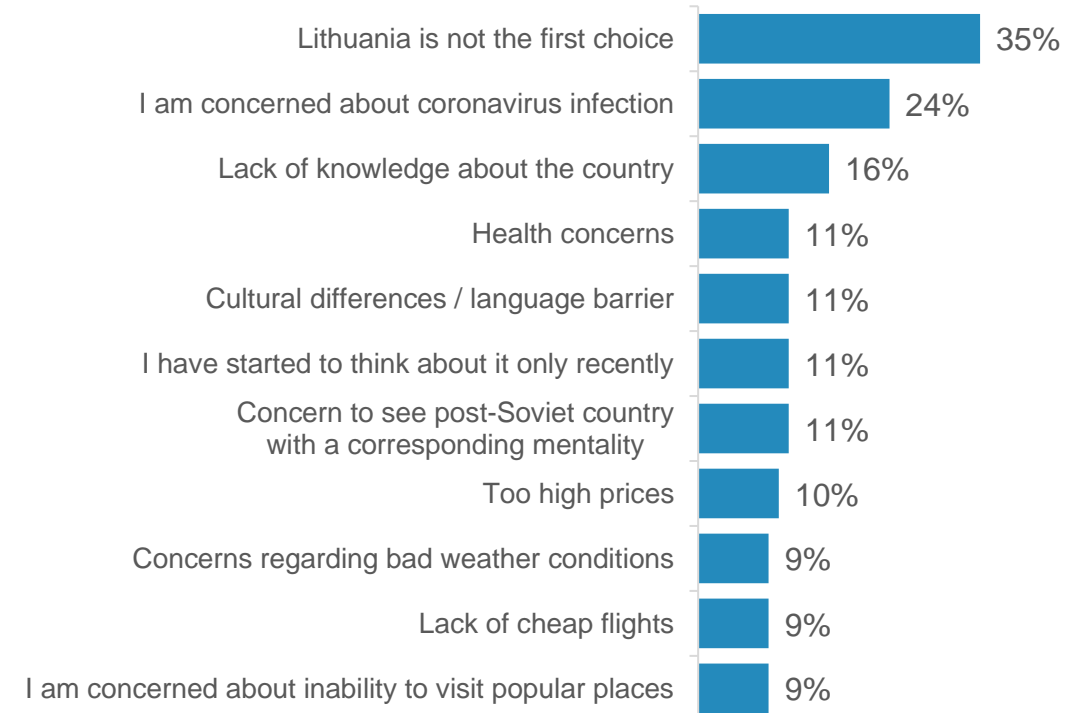
Lithuania Visitors



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

Sample: those who ever visited Lithuania, N=70 (small sample size)

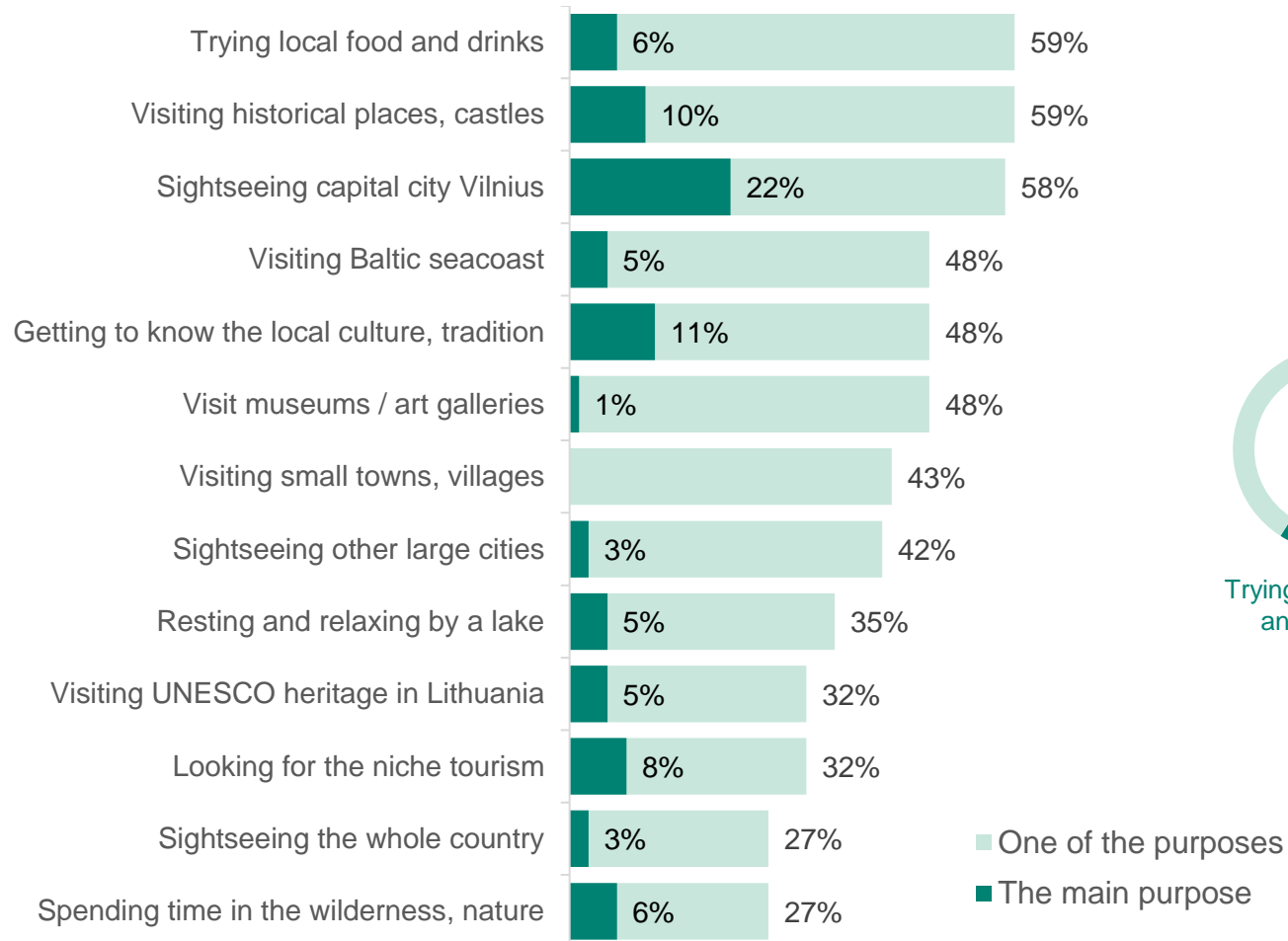
Lithuania Intenders / Considerers



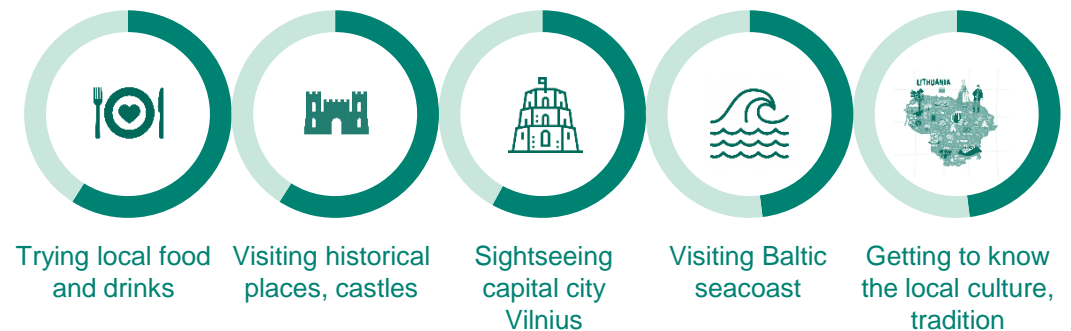
Why haven't you been to Lithuania yet, even though you have considered or are planning such a trip? (multiple choice)

Sample: those who intend to visit Lithuania, N=79 (small sample size)

Vilnius, historical places and the local culture are the main objects of attraction for future visitors



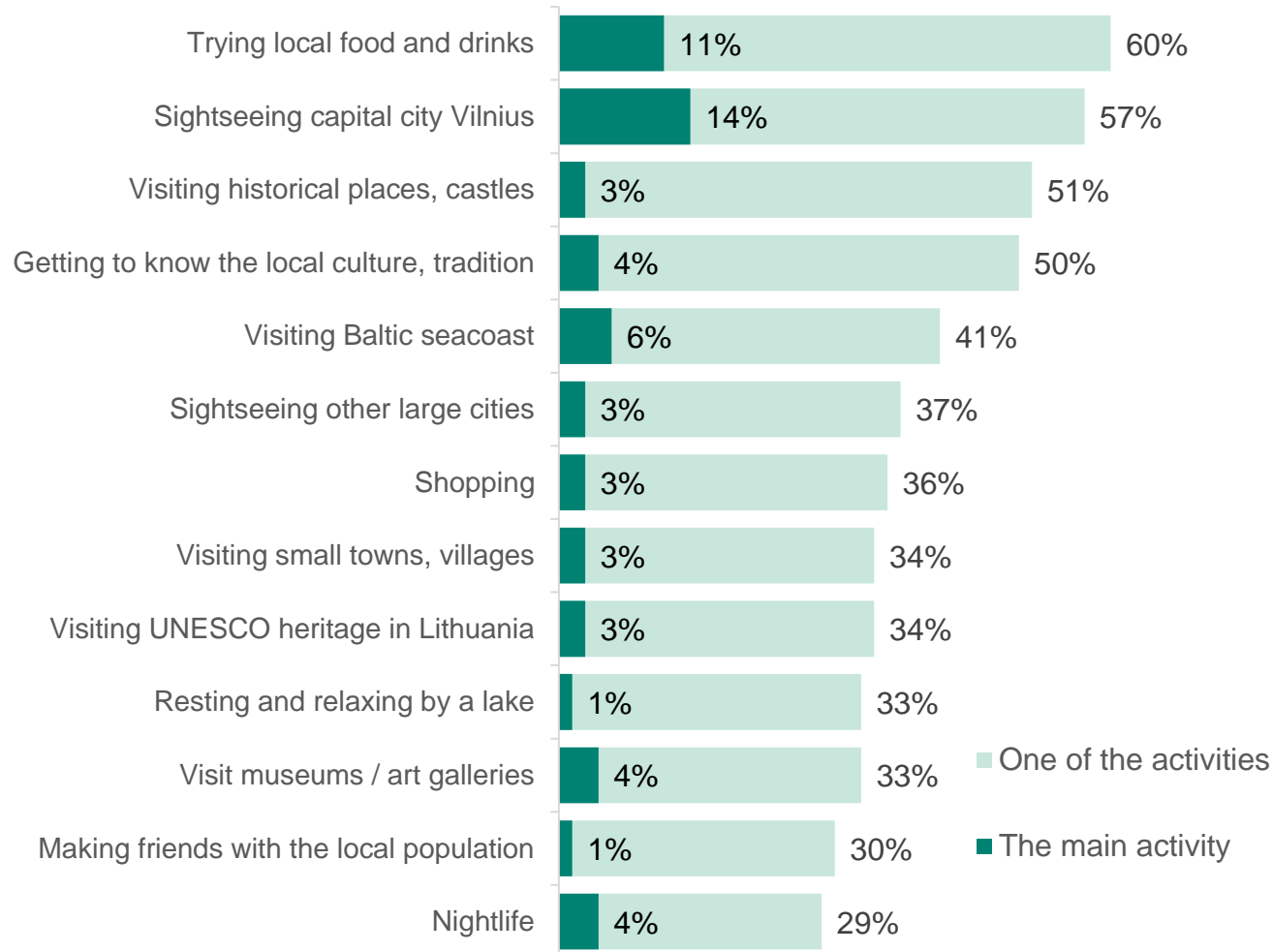
The main purposes to travel to Lithuania



Sample: those who intend to visit Lithuania, N=79 (small sample size)

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

Seeing Vilnius and tasting the local cuisine were the key activities for previous visitors



The main activities in Lithuania



Trying local food and drinks



Sightseeing capital city Vilnius

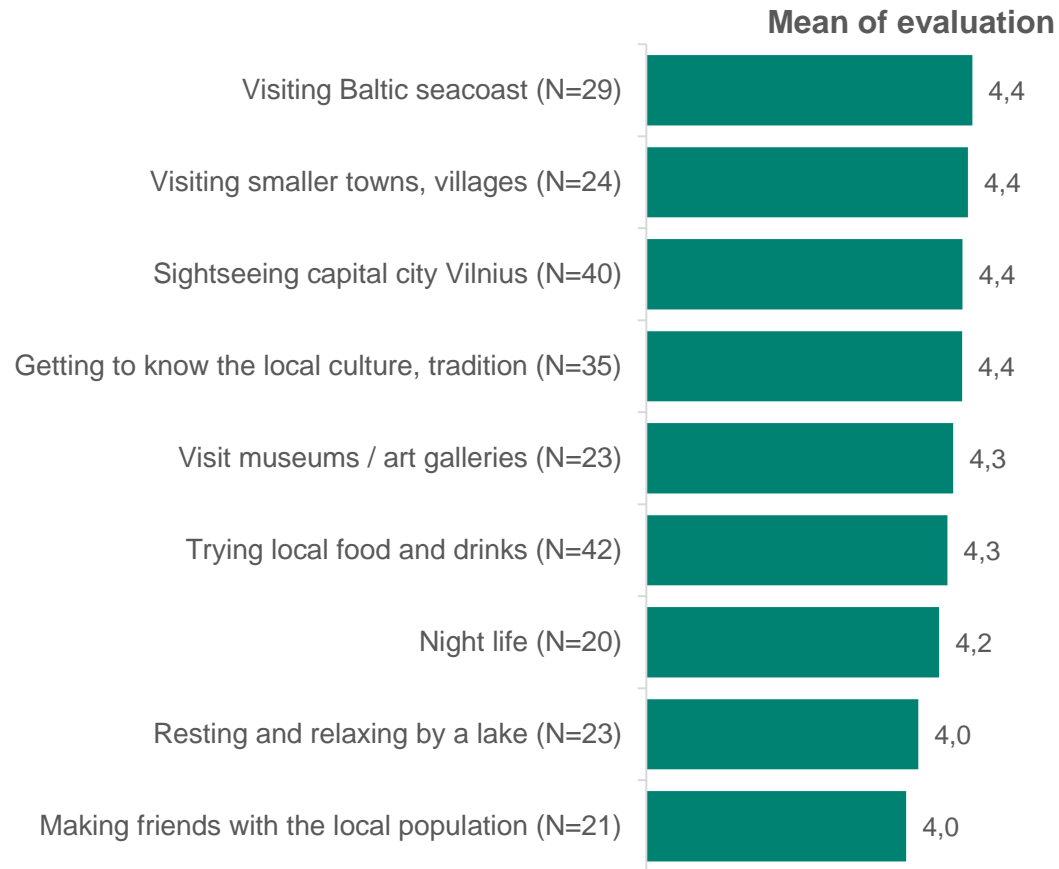


Visiting historical places, castles

Sample: those who ever visited Lithuania, N=70 (small sample size)

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, cities and culture of Lithuania



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".

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

Main conclusions and recommendations



Potential number of British tourists in Lithuania

The number of 25-65 y. o. British: 35,47 million
(<https://www.ons.gov.uk/>, 2020)

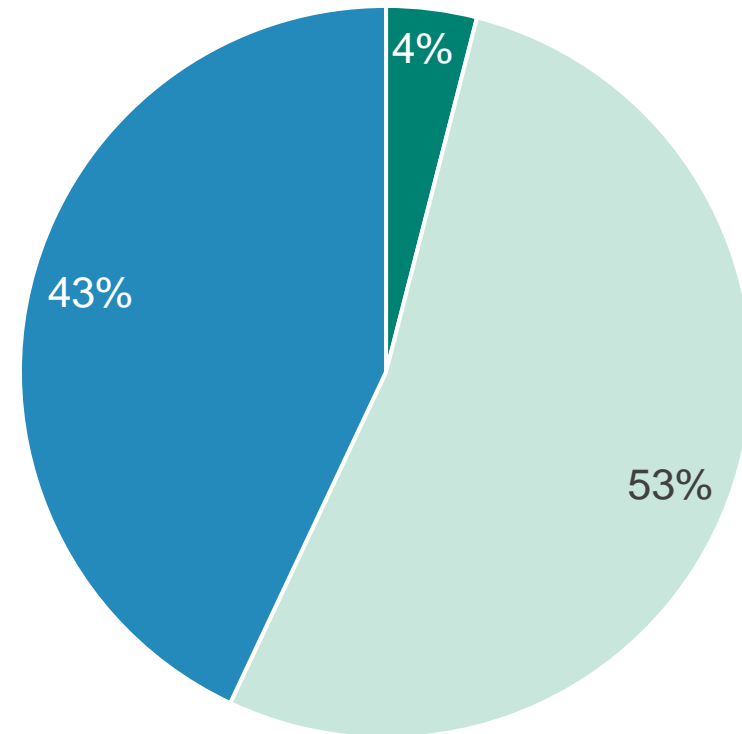
According to the survey, 57% of them travel abroad at least once a year: 20.2 million

7% of them intend to visit Lithuania:

1,4 million British

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25-65 y. o. residents of the United Kingdom



■ Intenders ■ Travel but do not intend ■ Do not travel

How to attract travelers from the UK to visit Lithuania?

- Take full advantage of the intention for **a 4-7 days trip in Lithuania**. For example, offer to combine visiting all Baltic countries and the seacoast for longer trips, come for camping, canoeing, slow tourism experiences. While these are not the most popular trip types, they are intended among those who plan a longer stay.
- Offer options for **different budget levels**, as they vary a lot among British travelers (from 500 to 2000 Eur per person).
- British **do not know much about Lithuania**, but they are eager to organize trips on their own and use quite a lot of different information sources for that. Therefore, **be visible** in Google search, travel agencies', Tripadvisor and similar websites.
- Trigger with **low-cost flights**, and then raise interest in visiting with a promise to see **natural beauty, to try local food, and learn about the history through sightseeing**. These are the main things which attract British tourists to Lithuania.



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