

Outbound tourism review.

Comparison of Sweden, Norway, Denmark,
the Netherlands and Belgium



Autumn 2023

Outbound tourism research

In 2023, Travel Lithuania commissioned outbound tourism research in 5 countries - Sweden, Norway, Denmark, the Netherlands and Belgium. The research consisted of a quantitative and qualitative survey of frequent travellers in the respective country

Target group in all 5 countries:

Qualitative study – 25+ years residents who travel abroad at least once a year (excluding the Covid period)

Quantitative study – residents aged 25-70, who travel abroad at least once a year, have never been to Lithuania, but knows Lithuania well enough to express opinion



Quantitative stage: 807 online surveys of 15 minutes
Qualitative stage: Two 2h FGDs with 12-16 respondents



Quantitative stage: 1004 online surveys of 15 minutes
Qualitative stage: Two 2h FGDs with 12 respondents



Quantitative stage: 1016 online surveys of 15 minutes
Qualitative stage: Two 2h FGDs with 16 respondents



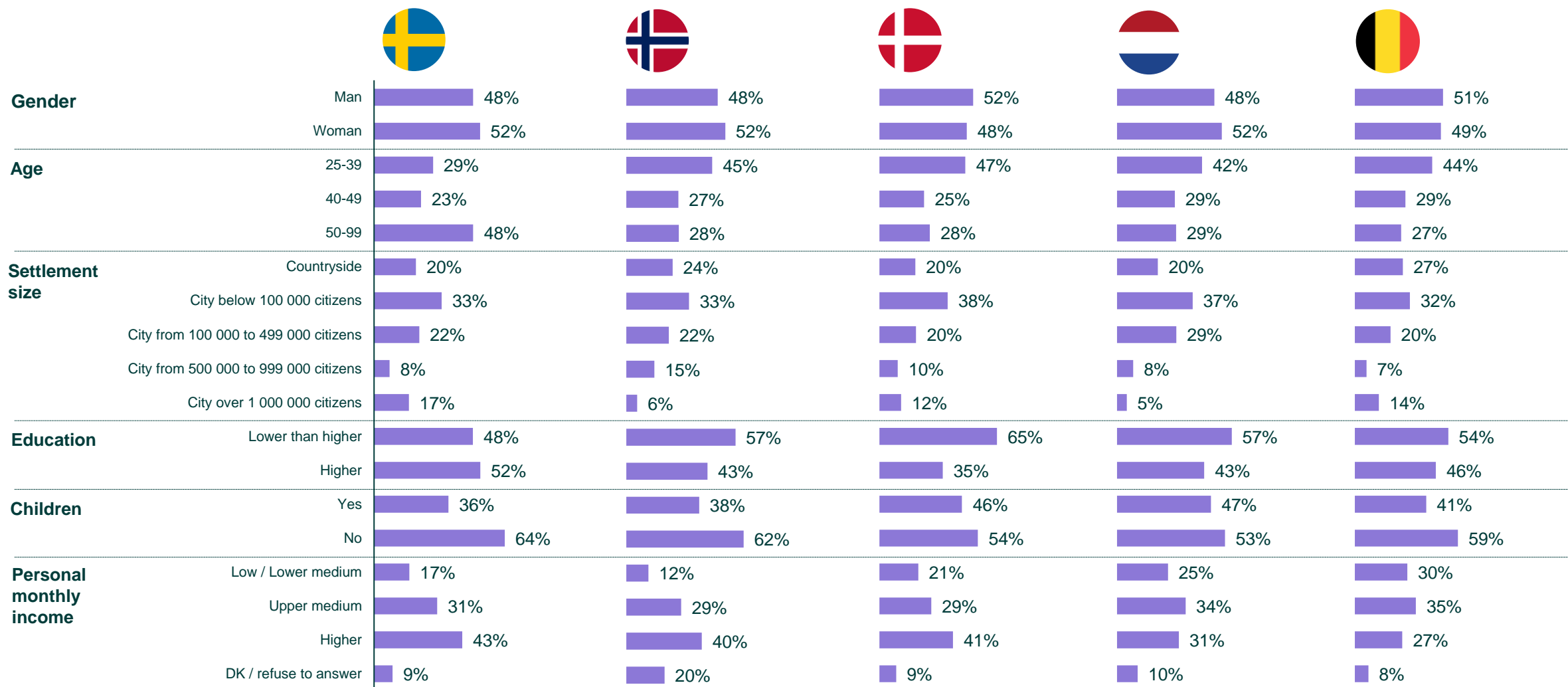
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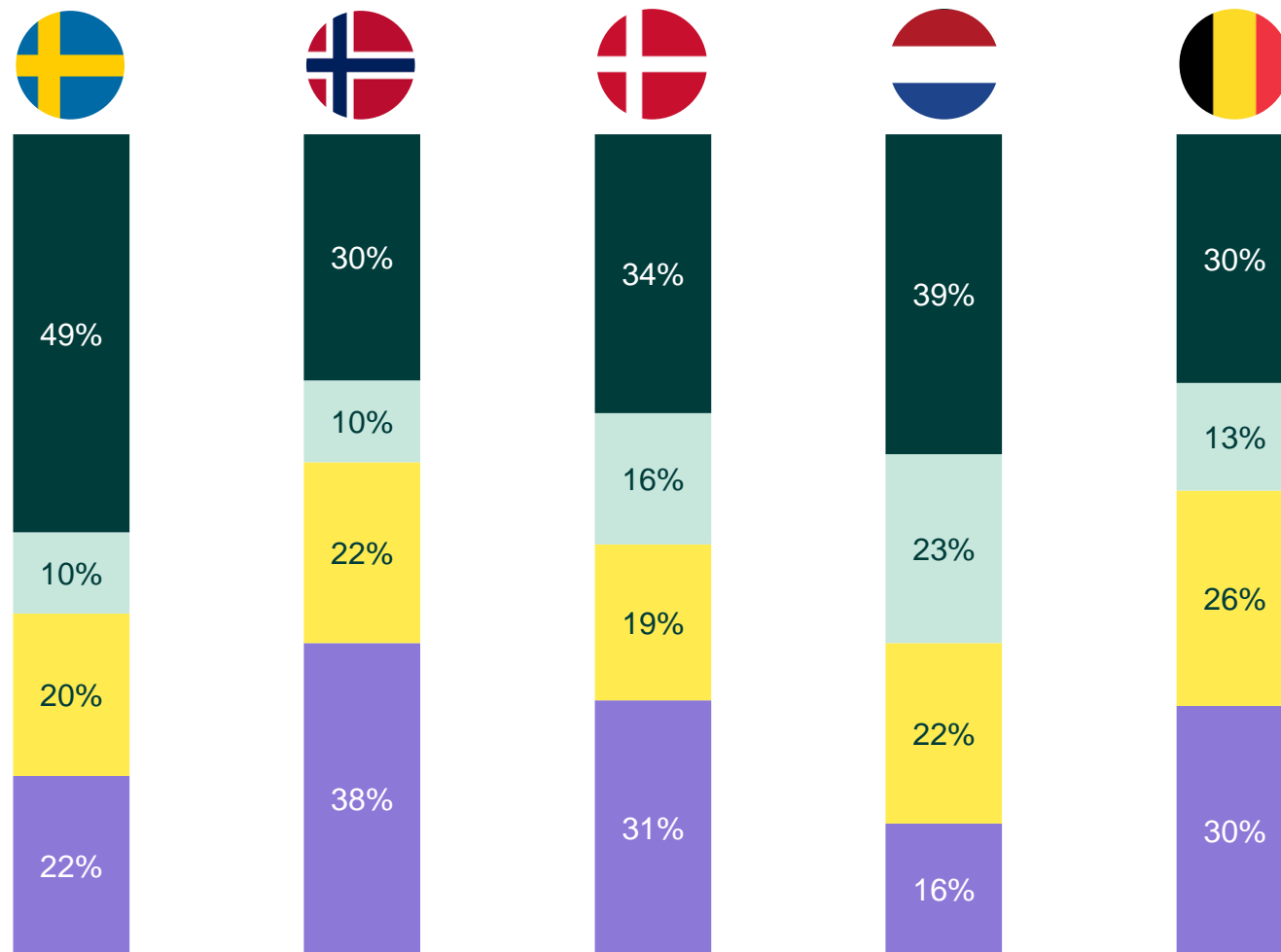
Quantitative stage: 1011 online surveys of 15 minutes
Qualitative stage: Two 2h FGDs with 16 respondents

Tourist profile

Demographic profile



Types of respondents according to their attitude towards visiting Lithuania



Non-rejectors

People who are **not planning** to visit Lithuania, but do **not reject** it

Rejectors

People who **do not plan** to visit Lithuania

Intenders

People who are **planning** to visit Lithuania

Visitors

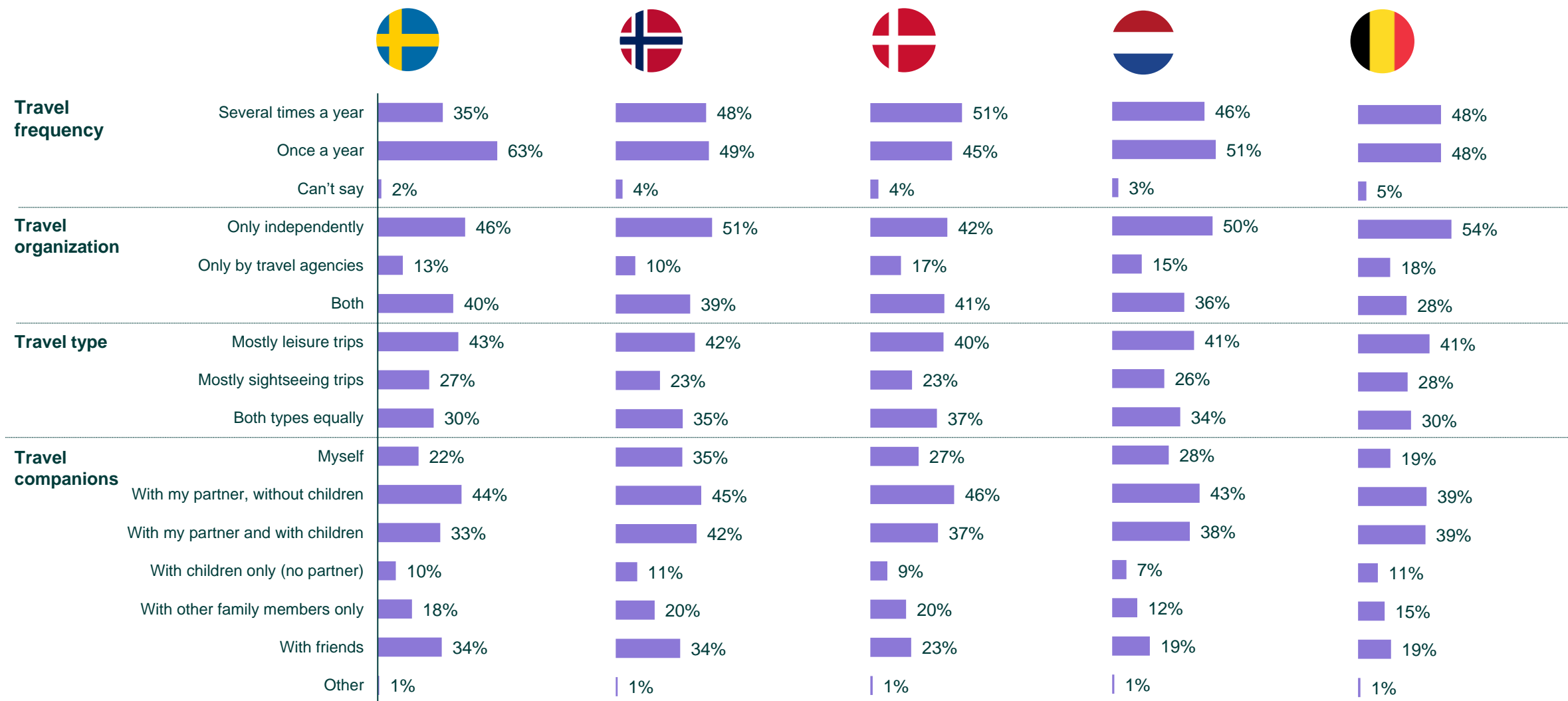
People who **have visited** Lithuania for tourism / leisure

Non-Visitors

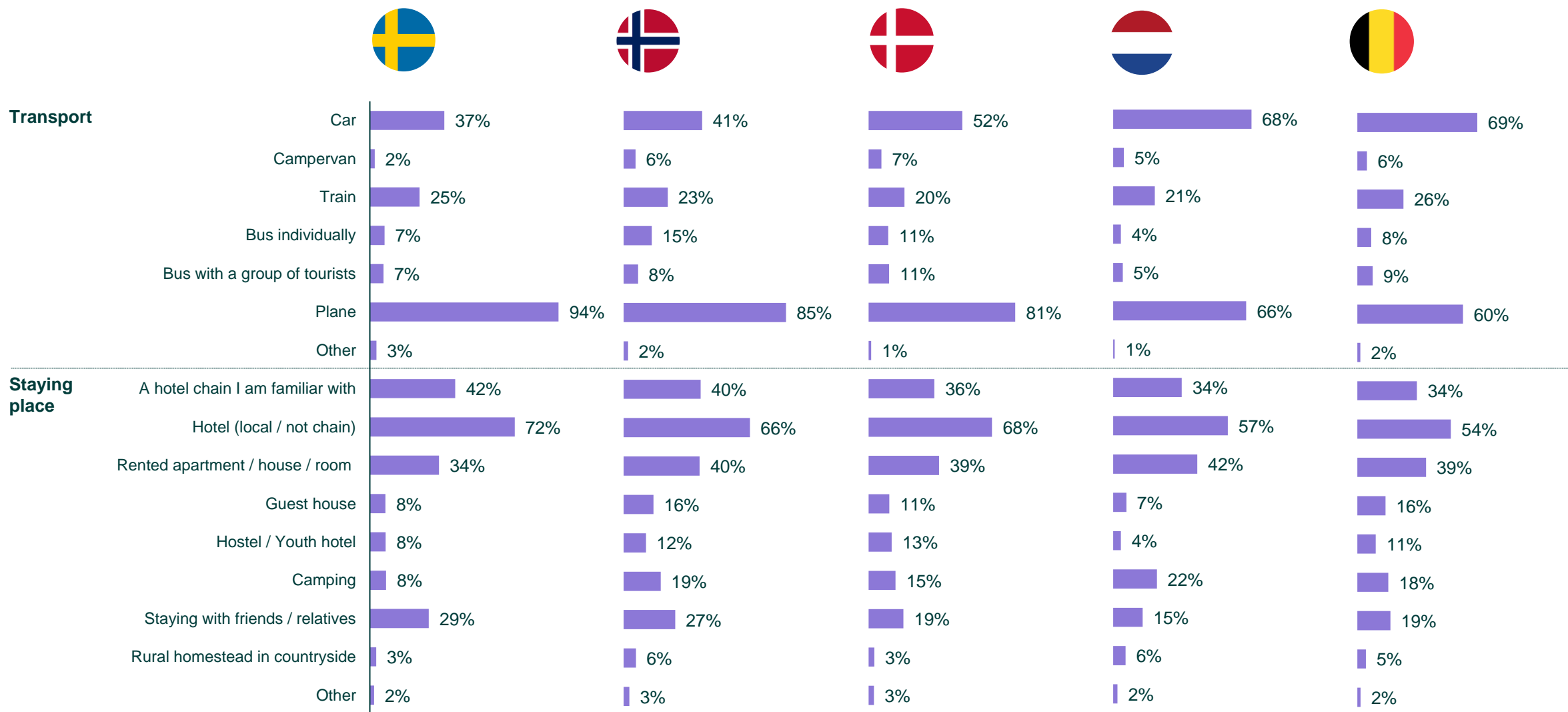
People who **have not visited**

Travelling habits, planning, information

Traveler profiles



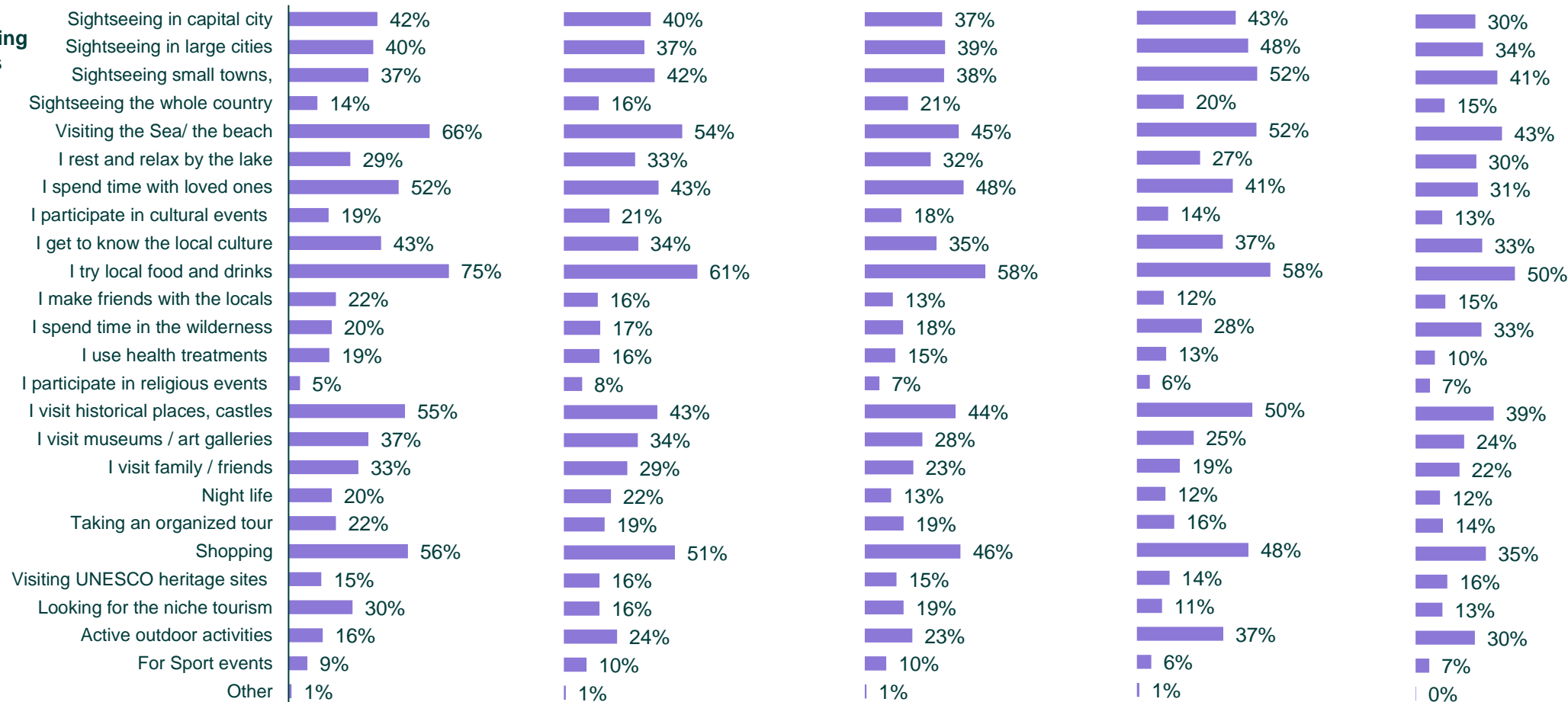
Traveler profiles



Travel activities



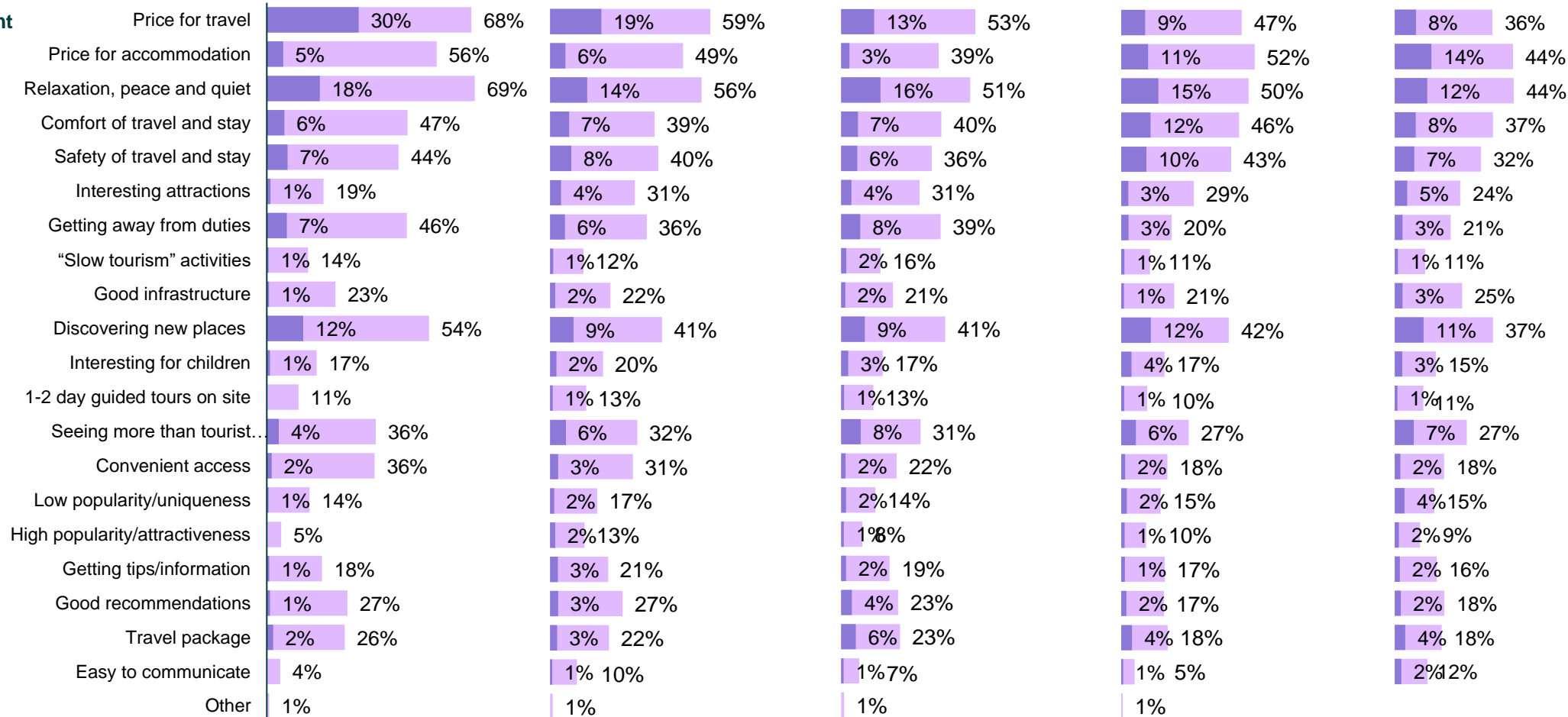
What do you usually do during your vacations abroad?



Important factors for travel planning

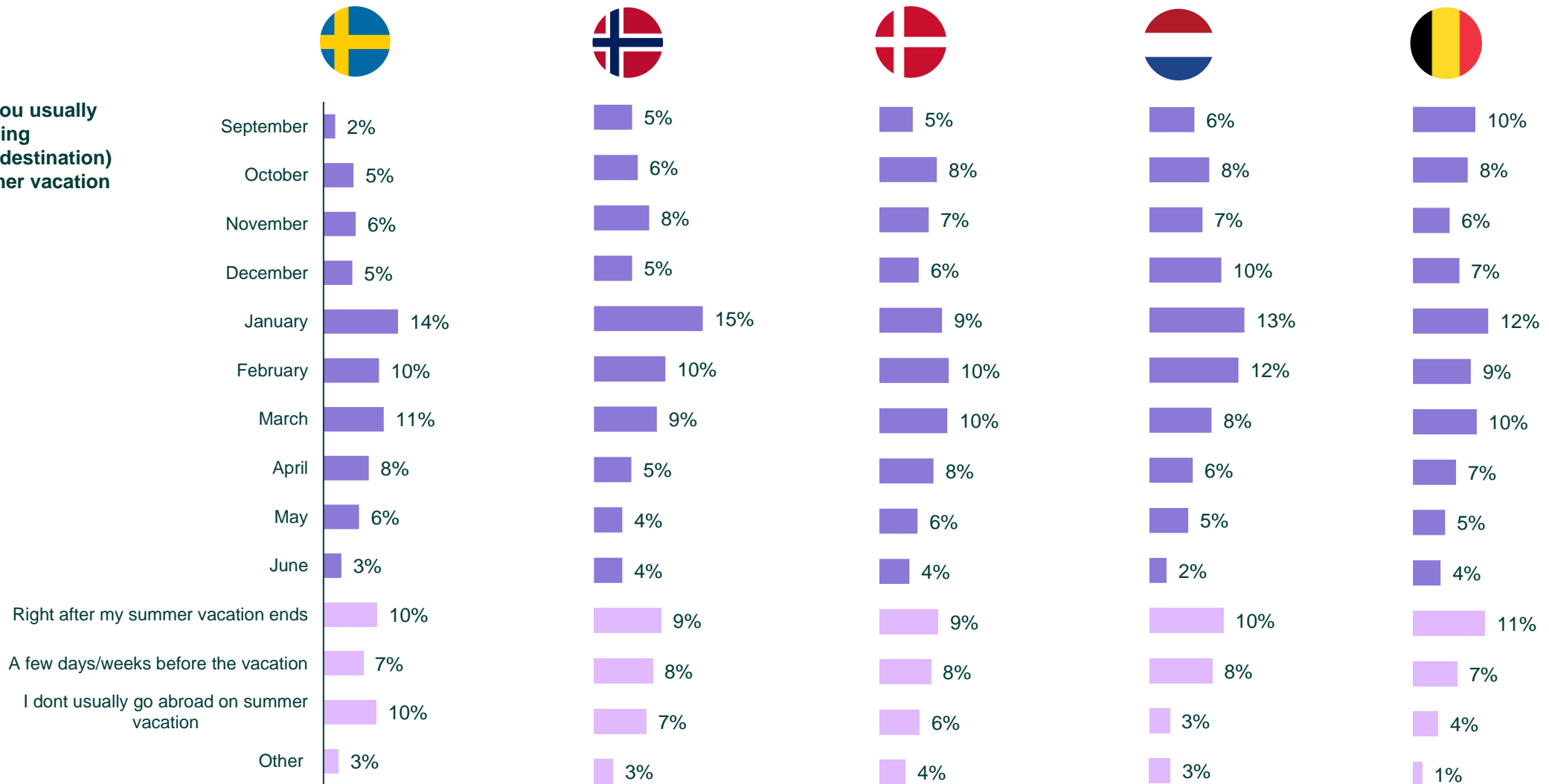


What is important for you when planning vacations abroad?



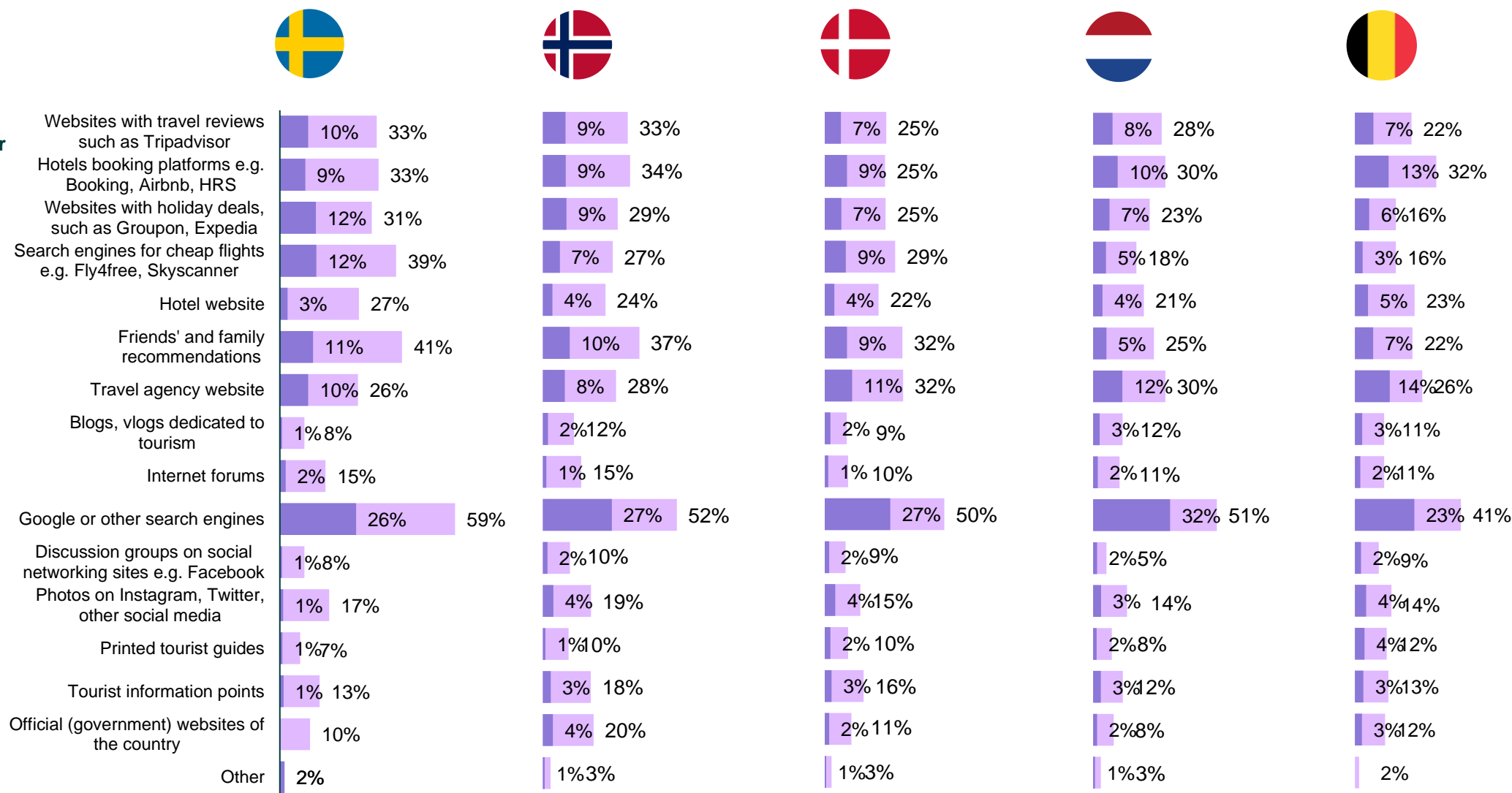
Planning summer vacation

When do you usually start planning (choosing destination) your summer vacation abroad?

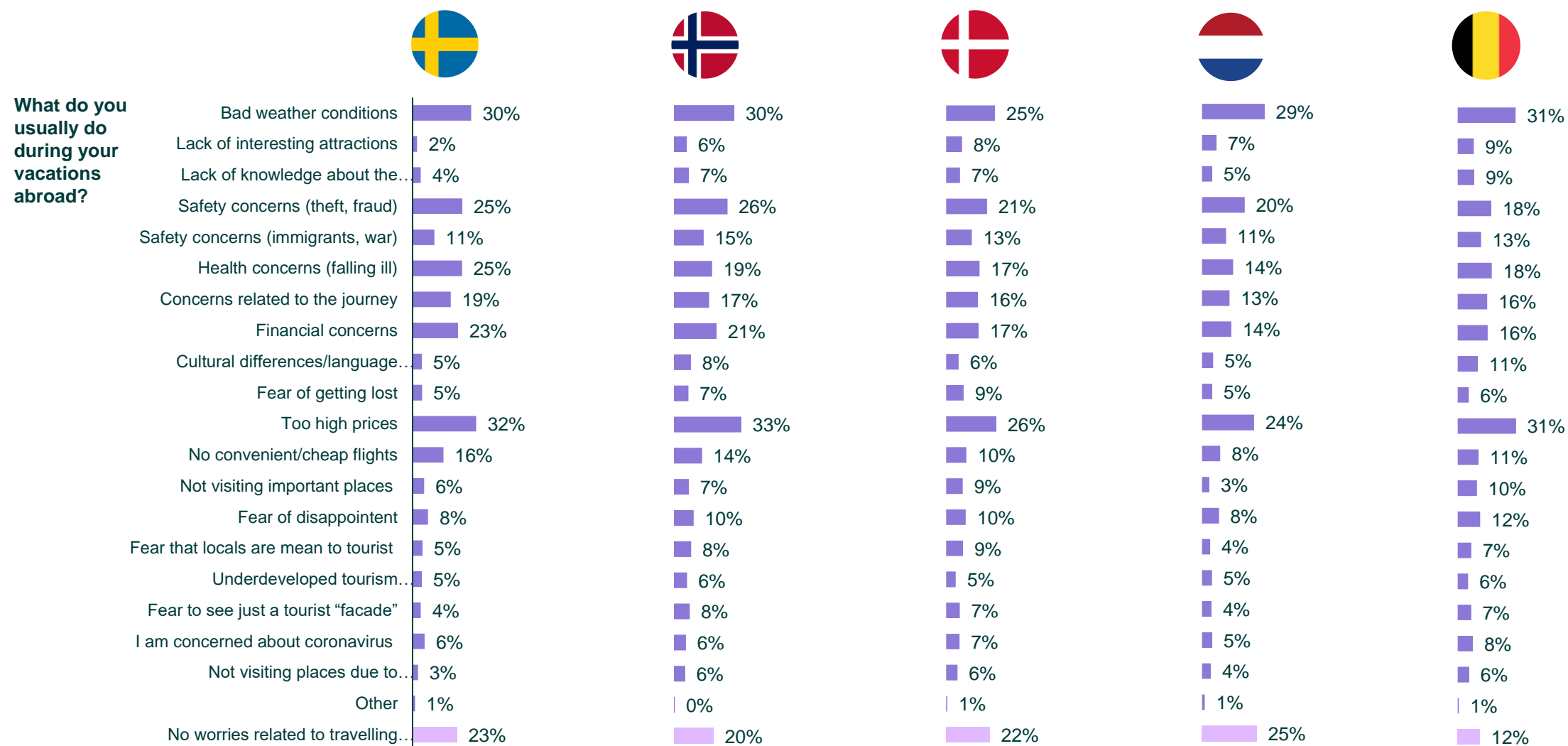


Sources of information

Where do you usually look for information to plan your vacations abroad?



Concerns about traveling abroad

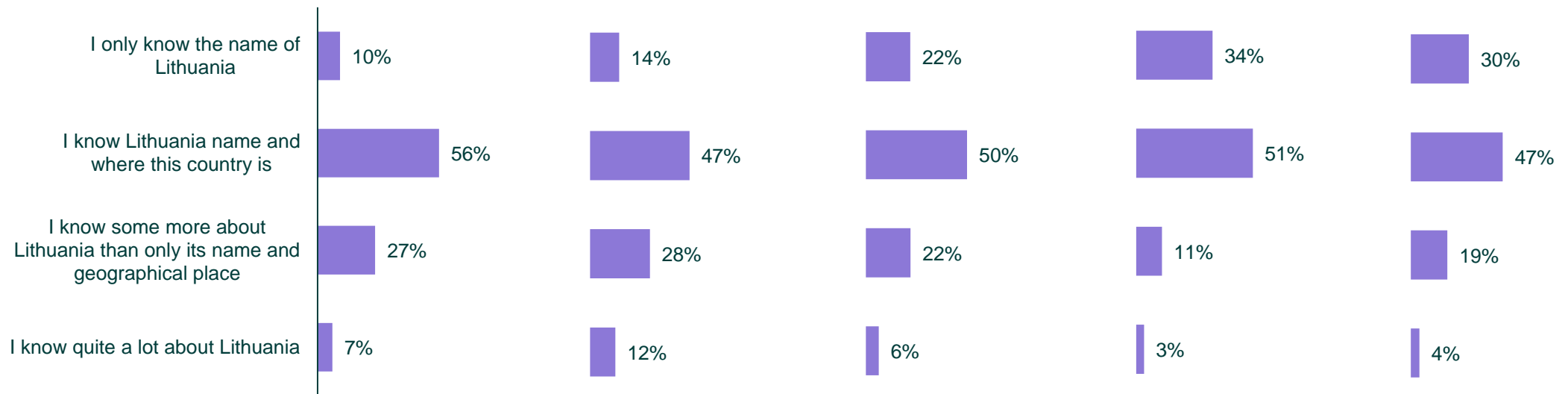
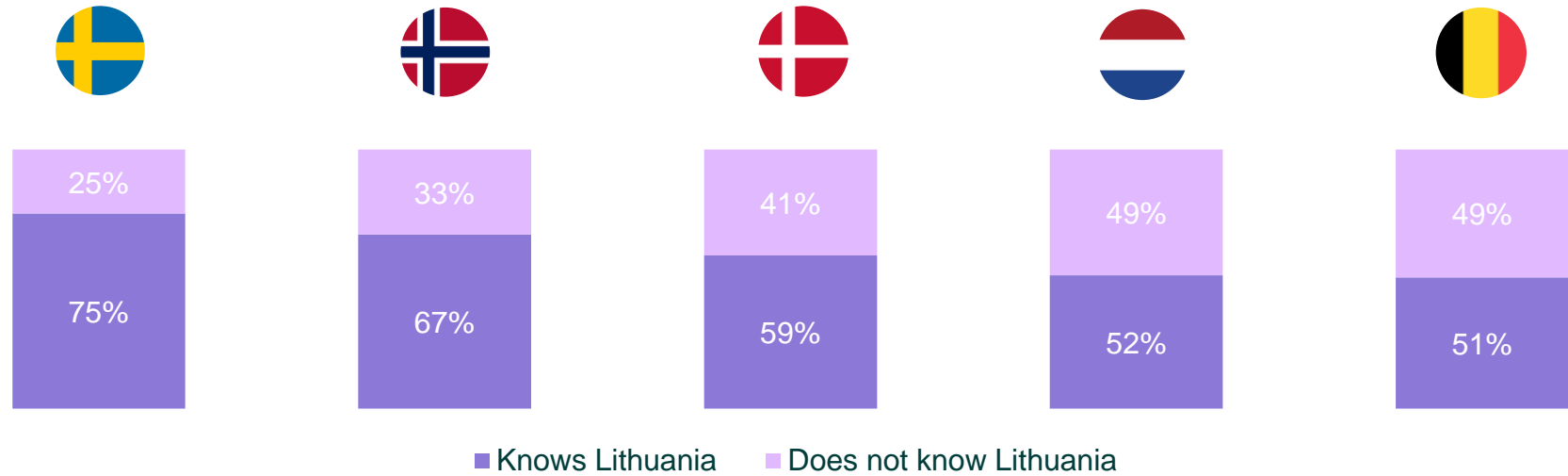


Top Findings

- Most travelers that go abroad more than once a year are among Dane respondents (51%), least – among Swedes (35%).
- Most travelers in all the countries organize their travels independently. Biggest part of respondents relying solely on travel agencies are in Belgium (18%) and Denmark (17%). The biggest part of travelers relying on travel agencies at least to some extent is in Denmark (58%).
- Sightseeing trips are similarly popular in all 5 markets – around 25 percent of travelers then to only choose them and around 33% choose both (sightseeing and leisure) trips equally.
- Most of the respondents in all the markets travel with their families – with their partner with or without children.
- Most popular means of transportation – a plane and a car. The most travelers that go abroad by plane are among Swedish respondents (94%) and the least – among Belgians (60%). And on the flip side, the most travelers that go abroad by car are among Belgian travelers (69%) and the least – among Swedes (37%).
- In all 5 markets, trying local foods and drinks are the most popular activity abroad. Among other very popular activities are visiting the sea, shopping, visiting historical places, spending time with the loved ones (except Belgium). Active outdoor activities while very popular among Dutch and Belgians (37% and 30%) are less popular with Swedes, Norwegians and Danes (16%, 24% and 23%).
- While planning a trip abroad travelers take the price for travel and/or accommodation into an account. Other highly important factors are relaxation, peace and quiet as well as discovering new places.
- Most common time to start planning summer vacation are in between January and March – up to third of respondents choose this time to start planning their trips. However, about 1 in 10 travelers from all the markets start planning right after their previous trip ends.
- Google search Engine is by far the most popular way to look for information regarding trips abroad. For Swedes and Norwegians friends' and family recommendations are also very common source of information.
- Undoubtedly, weather conditions and prices are two main concerns when traveling abroad. Swedes and Norwegians tend to be more concerned with safety (25% and 26%).

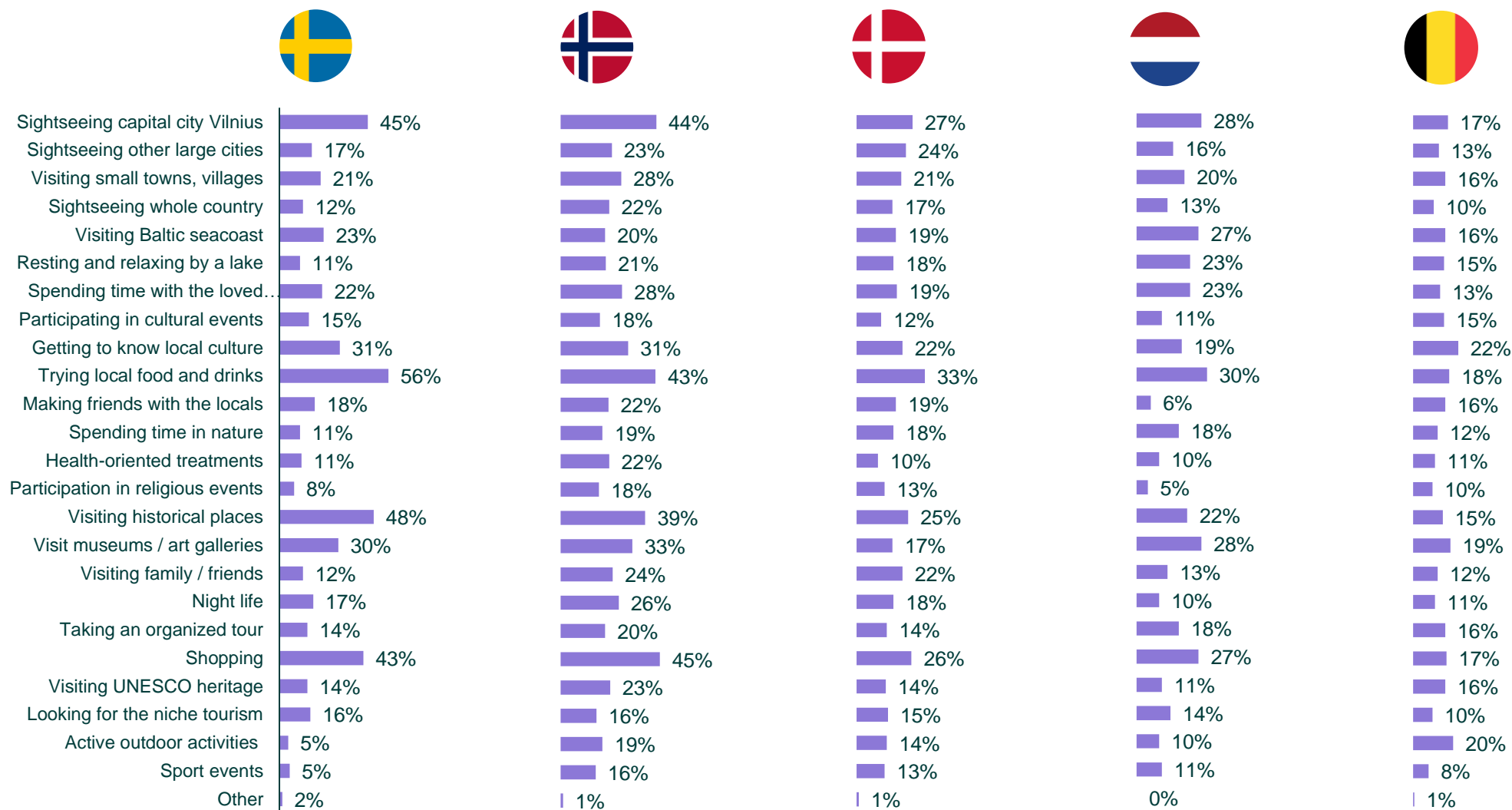
Lithuania as a travel destination

Knowledge about Lithuania

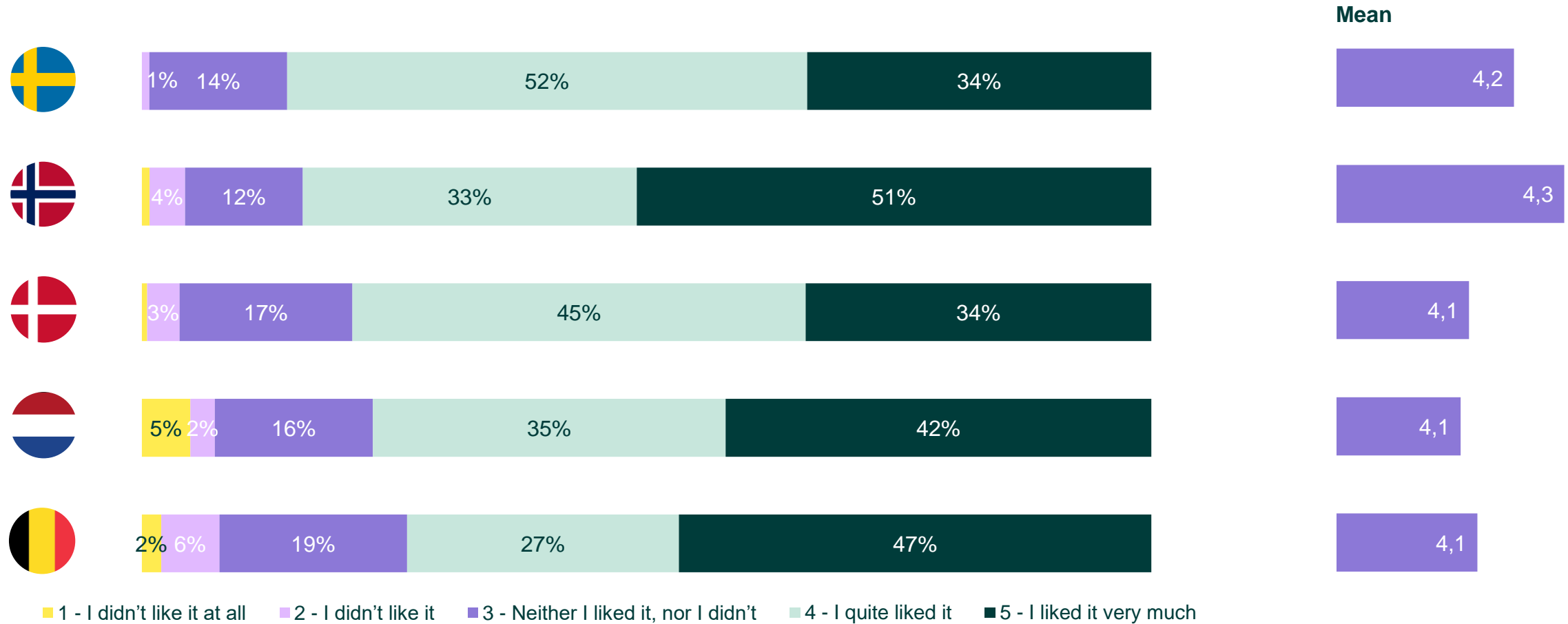


Travel activities in Lithuania

Which of the following activities did you participate in during your tourist trip to Lithuania?



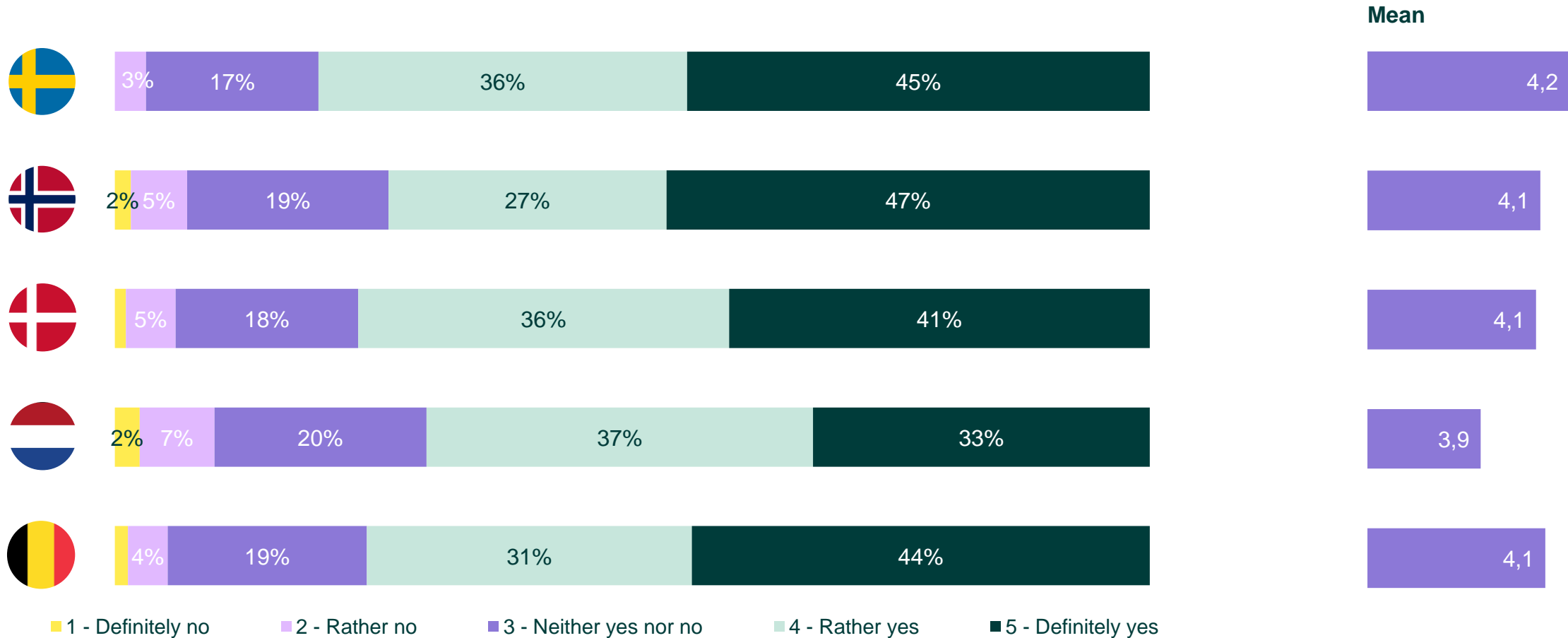
Appeal of Lithuania



Sample: those who ever visited Lithuania: Sweden N=132; Norway N=257; Denmark N=187; The Netherlands N=83; Belgium N=156

How did you like the Lithuania?

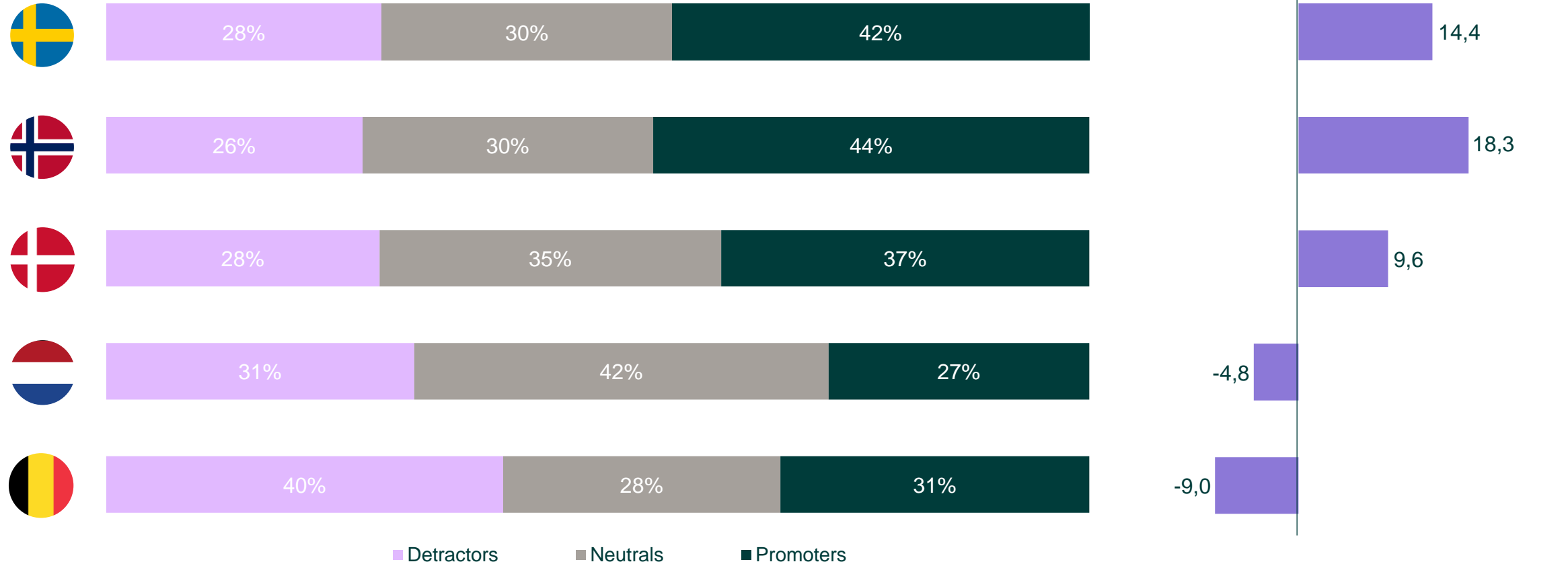
Possible return to Lithuania



Sample: those who ever visited Lithuania: Sweden N=132; Norway N=257; Denmark N=187; The Netherlands N=83; Belgium N=156

Would you like to visit Lithuania again?

Willingness to recommend travelling to Lithuania to relatives and friends

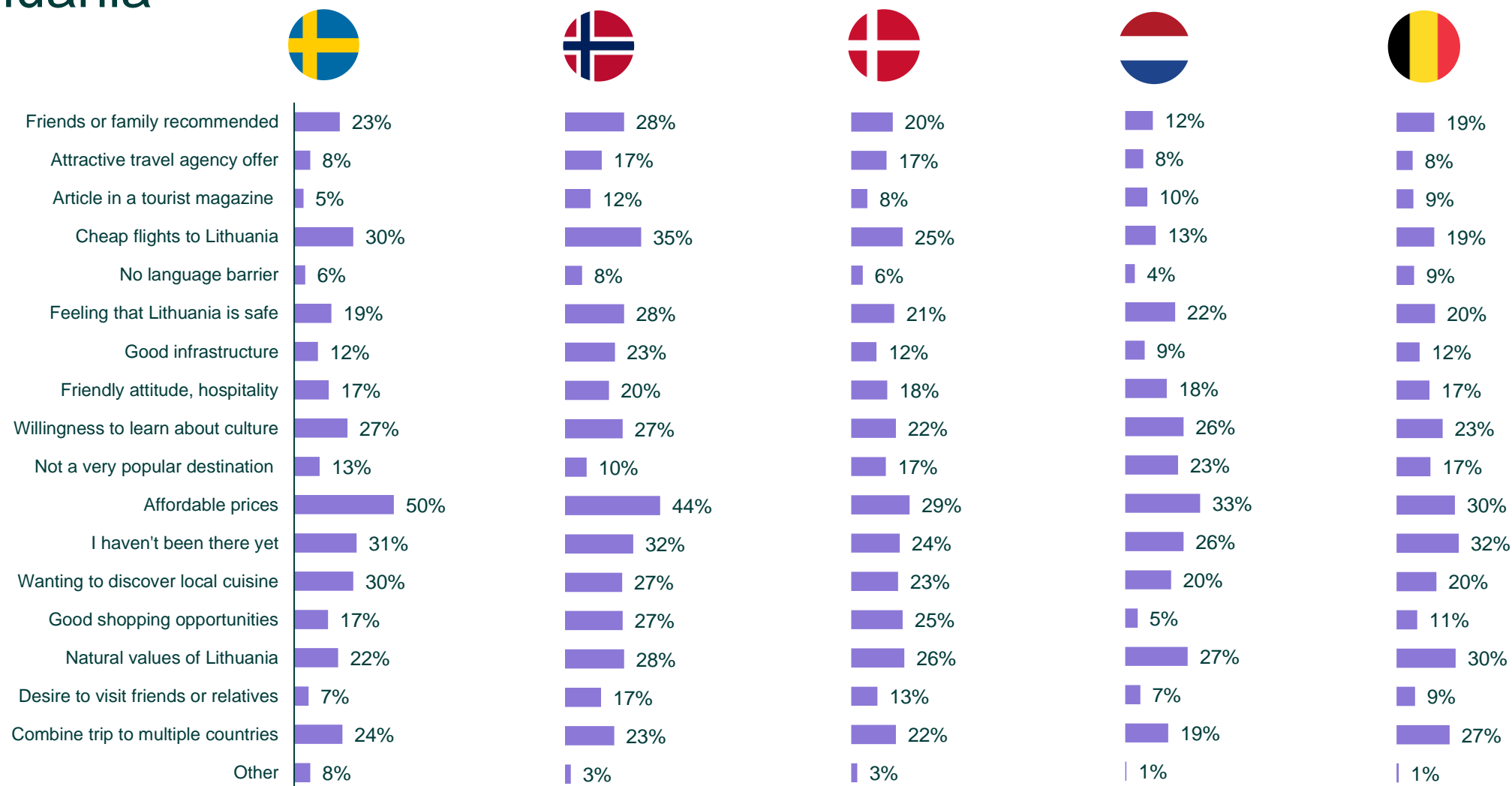


Sample: those who ever visited Lithuania: Sweden N=132; Norway N=257; Denmark N=187; The Netherlands N=83; Belgium N=156

Would you recommend travelling to Lithuania to your family / friends? Please use a scale from 0 to 10, where 0 means I would definitely not recommend and 10 means I would definitely recommend.

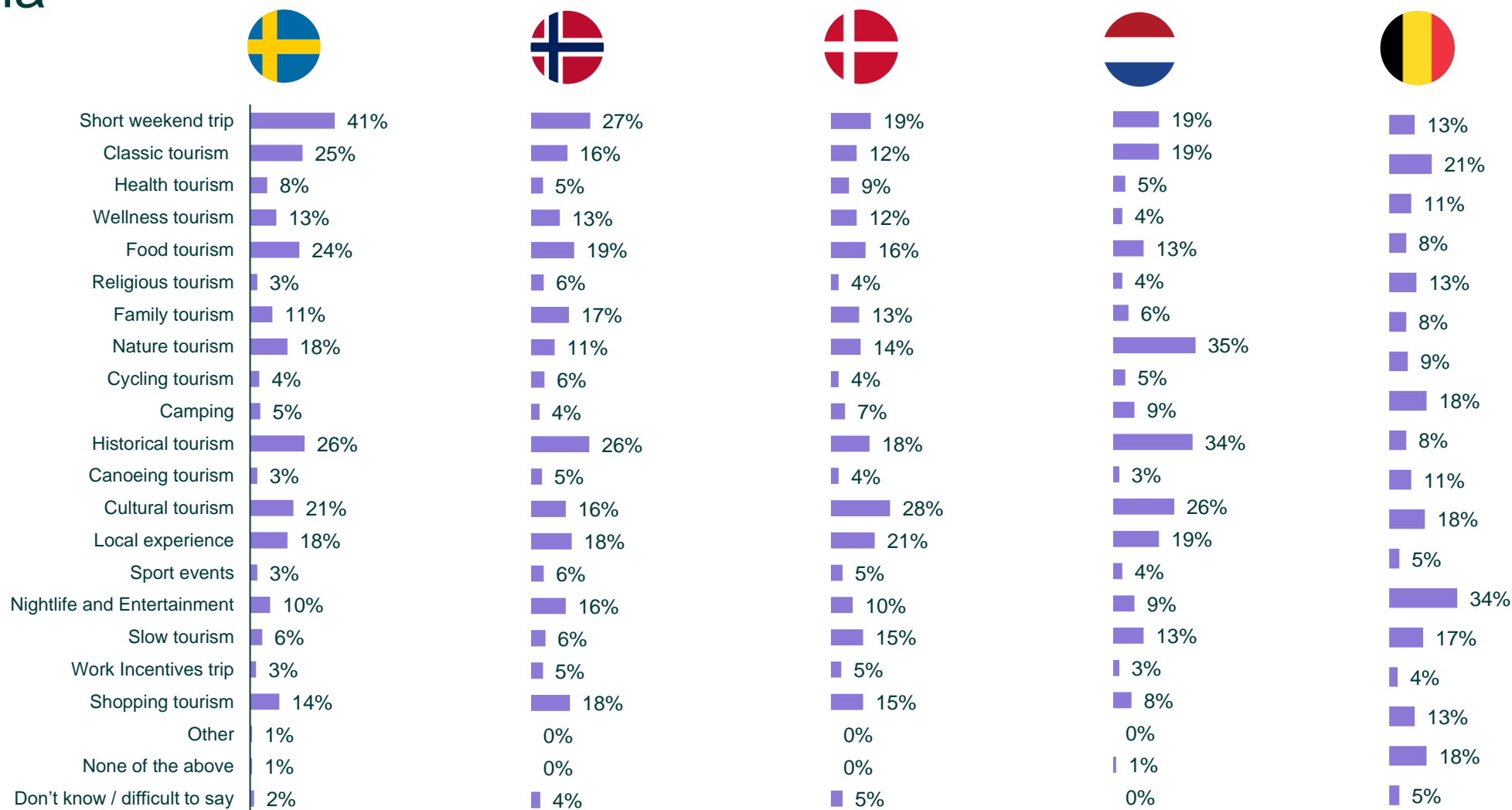
Triggers for considering a vacation in Lithuania

What made you start to consider travelling to Lithuania?

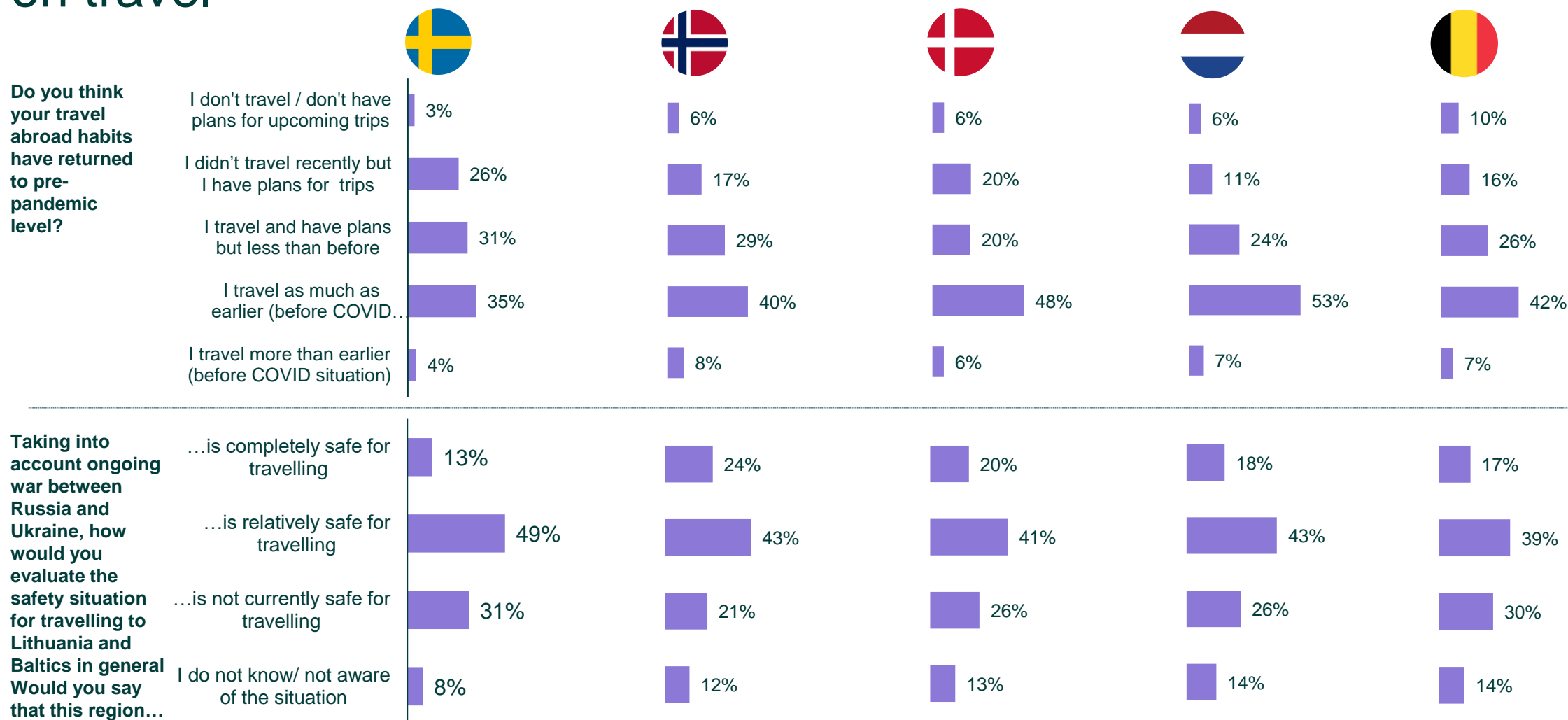


Preferred types of tourism in Lithuania

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



Impact of the COVID-19 and war in Ukraine on travel



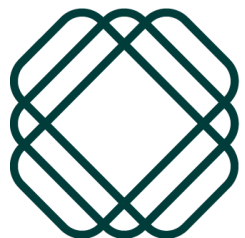
Top Findings

- The highest proportion of respondents claiming to know Lithuania is among Swedish respondents (75%) and the lowest among Belgian respondents (51%). However, the most respondents claiming to know more than just name and location are among Norwegian travelers (40%).
- Respondents who have been to Lithuania report trying local foods, sightseeing, visiting historical places, shopping (especially Swedish and Norwegian travelers).
- From frequent travelers that have been to Lithuania, Norwegians found it the most appealing (mean 4,3 on the scale from 1 to 5), while the most likely to come again are Swedes (mean 4,2).
- The highest Lithuanian NPS is among Norwegian travelers – 18,3, while among Belgians it's -9,0.
- Most travelers consider Lithuania for affordable prices (especially Swedish and Norwegian travelers), cheap flights (especially Swedish and Norwegian travelers), visiting a new place they never been before and natural values of Lithuania (except Swedes).
- Most Swedish travelers would like to come to Lithuania for short weekend trip (41%). Most Norwegians would like to either have a short weekend trip or historical tourism trip (27% and 26%). Danes would prefer cultural tourism trip (28%). The most of Dutch travelers claim to prefer nature tourism or historical tourism trip to Lithuania (35% and 34%). Biggest part of Belgian travelers would like to visit for nightlife and entertainment (34%).
- All markets still feel slight impact of Covid19 pandemic only about half of frequent travelers resumed traveling as much or even more that they did before Covid situation (from 39% in Sweden to 60% in the Netherlands).
- 21% (Norwegians) - 31% (Swedes) consider Lithuania not currently safe for traveling due to ongoing war between Russia and Ukraine.

Thank you

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