



Exploring Trends among Baltic Travellers

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The Baltics are becoming increasingly interesting

According to SEB, a leading northern European financial services group, GDP growth is expected to increase to 1.8-2.8 per cent in 2025, and even more in 2026, depending on the specific country.

In 2024, we turned our attention to the Baltics, as these markets are becoming increasingly interesting, especially for destinations seeking growth opportunities. With significant economic growth and an increasing willingness among the Baltic people to travel, we anticipate these markets will expand in the coming years. We decided to conduct a comprehensive study, investigating the travel behaviour and preferences of Baltic travellers, and we are happy to share some of these insights with you along with a brief overview of the economic situation in these growing markets.

The Baltic countries experience economic prosperity at the moment, and in 2024, all countries saw real wage growth, positively affecting consumer spending. According to SEB, a leading northern European financial services group, GDP growth is expected to increase to 1.8-2.8 per cent in 2025, and even more in 2026, depending on the specific country. Thus, the economic recovery in the countries is strong. We believe that this will also be reflected in the travel and tourism industry, with more Baltic people travelling to explore the world.

The Baltic travellers increase their outbound expenditure.

We have noticed an increase in the outbound expenditure of Baltic countries in recent years, with the most notable increase in Latvia. The latest data from UNWTO from 2023 show that the outbound expenditure for the Baltics was 4.3 billion USD, indicating a strong appetite for exploration. With the increase in outbound expenditure in recent years, we argue that this ongoing enthusiasm highlights the need to understand how their preferences and travel motivations are changing in 2025.

The Baltic travellers: Preferences and inspirations for 2025

To keep track of the Baltic travellers' preferences and behaviours, each year we conduct a comprehensive study, which helps us spot changing patterns and expectations.

This meticulous research covers several topics such as travel inspiration, booking methods, travel modes, accommodation choices, destination preferences, and the overall travel experiences of these explorers.

The study reveals some of the opportunities that emerge from the evolving demands of these travellers, providing valuable information for destination management organisations and businesses within the travel and tourism industry.





Family and friends are key sources of travel inspiration – but so are online media

Overall, **Baltic travellers are non-traditionalists when it comes to sourcing travel inspiration.** Traditional sources of inspiration such as travel agencies (ranked 6th) have less impact on the travel decision of Baltic travellers.

Instead, **they seek out travel inspiration via social media platforms.** Facebook and YouTube are especially popular, with 45 per cent and 36 per cent of Baltic travellers using these social media for travel inspiration, respectively.

Top-3 sources of travel inspiration

- 1. Family and friends**
- 2. Facebook**
- 3. YouTube**

This strong preference for social media highlights the importance of maintaining a strong online presence for destinations and travel businesses aiming to capture the attention of Baltic travellers. As traditional recommendations from travel agencies become less influential, it is crucial to leverage platforms like Facebook and YouTube, which are heavily relied upon.

Additionally, other visually driven social media platforms like Instagram and TikTok are predicted to gain popularity among Baltic travellers. Observing similar trends within the Nordic region, these platforms are expected to play an increasingly significant role in shaping travel decisions. Therefore, destination management organisations as well as businesses within the travel and tourism industry must adapt to these digital trends to effectively engage and inspire Baltic travellers, thereby fostering interactive and appealing content that resonates with their preferences and expectations.

"We anticipate that other image- and videodriven platforms will become more important in the years to come"

The great outdoors is important to more than half of the Baltic travellers

Baltic travellers have a strong desire for immersive nature and outdoor experiences, coupled with a deep appreciation for cultural and historical encounters. A significant 53 per cent of these travellers seek to immerse themselves in natural landscapes at their chosen destinations, highlighting the importance of showcasing such environments to attract their interest. Nearly as many, 47 per cent, place great value on cultural and historical experiences when deciding on their travel destinations. This preference underlines the need to emphasise the rich cultural heritage and experiences to appeal to Baltic travellers.

Additionally, our analyses show that **sun and sand vacations** were the most popular choice among Baltic travellers, with 47 per cent opting for this type of holiday. This data indicates the appeal of beach destinations for these travellers.

However, **outdoor vacations are also taken by many, with 31 per cent of Baltic travellers having embarked on specific outdoor vacations** in 2024. This suggests that activities such as hiking and other outdoor activities are likely to play a crucial role in their destination choices moving forward. Therefore, destinations that offer a blend of sun, sand, and outdoor adventure are well-positioned to attract Baltic travellers.

Travel drivers

Nature and outdoor experiences **53%**

Cultural and historical experiences **47%**

Beach life **45%**

Preferred type of vacation

Sun and sand vacation **47%**

Visiting friends and family **32%**

Outdoor vacation **31%**





More than 70 per cent of Baltic travellers have engaged in sustainable actions while on vacation

These actions include choosing eco-friendly accommodation, enjoying local food experiences, or adopting a responsible approach to interacting with locals. They find local food experiences particularly significant while on vacation and this is how most Baltic travellers act sustainable while travelling. Contrary to this, their willingness to compensate for CO2 emissions is lacking. This might indicate that while sustainability is important to Baltic travellers, there should be a clear-cut benefit for them to prioritize it.

A large circular graphic on the left side of the page. It features a vibrant sunset sky with orange and pink clouds. Silhouettes of palm trees are visible against the sky, with some fronds extending into the circle from the top and bottom edges.

Methods

In this study, we employed a cross-sectional survey to collect quantitative data.

The survey was conducted among an international panel of consumers from Lithuania, Latvia, and Estonia. Data collection was conducted via a self-administered online questionnaire.

All individuals aged 18 or above were eligible to participate.

Data collection was conducted in Q3, 2024.

Data has been weighted by gender, age, and geography to ensure that the sample's composition mathematically matches the distribution found in the respective populations.

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