

INCOMING BALTIC STATES

Country and people¹

Baltic States	Estonia (EST), Latvia (LV), Lithuania (LT)
Capitals	Tallinn (425,000 inhabitants) (EST), Riga (700,000 inhabitants) (LV), Vilnius (523,000 inhabitants) (LT)
Area	175.117 km ²
Inhabitants	1.3 m (EST), 2.0 m (LV), 2.9 m (LT)
Mean age	42.4 - 43.4 years
Economy	GDP per capita: 16,525 Euro (EST); 13,116 Euro (LV); 13,283 Euro (LT)
Unemployment rate	6.5% (EST); 9.5% (LV); 8.6% (LT) (2016)*
Inflation rate	1.8% (EST); 1.4% (LV); 0.6% (LT)* *Forecast
Gini coefficient	0.34 (EST); 0.36 (LV); 0.36 (LT) (OECD average 0.31)

GENERAL TRAVEL BEHAVIOUR

Percentage of overnight stays domestic in accommodation establishments ²

- Estonia: 64% domestic / 36%non-resident
- Latvia: 69% domestic / 31%non-resident
- Lithuania: 47% domestic / 53%non-resident

- Intensity of travel abroad: 139.1% (Estonia), 121.8% (Latvia), 104.2% (Lithuania) (resident population from 15 years on) = 1.4 trips per person (Estonia), 1.2 trips per person (Latvia), 1.0 trips per person (Lithuania)

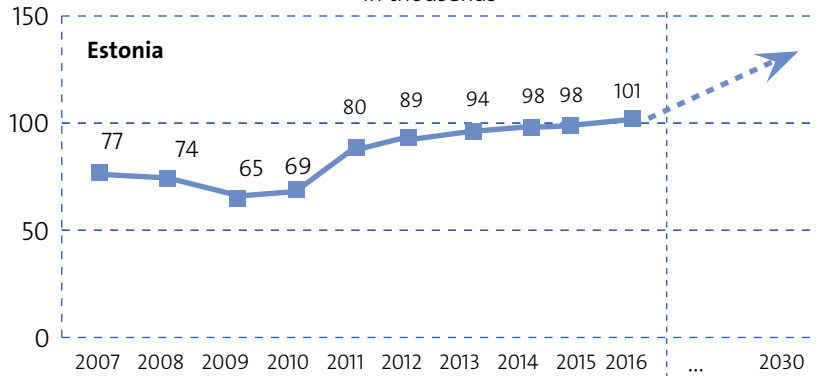
Destinations of trips abroad in 2016

rank 1 – Russia (EE); **Germany (LV)**; **Poland (LT)**
rank 2 – FIN (EE); LIT (LV); Germany (LT)

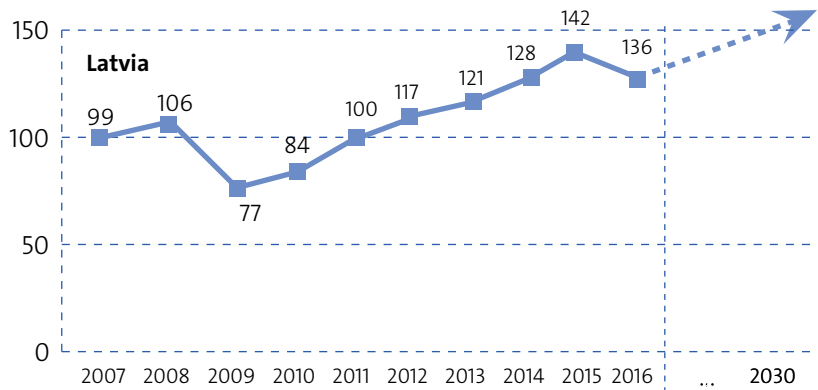
rank 3 – **GER (EE)**; EE (LV); RUS (LT)
rank 4 – LV (EE); PL (LV); UK (LT)

DESTINATION GERMANY

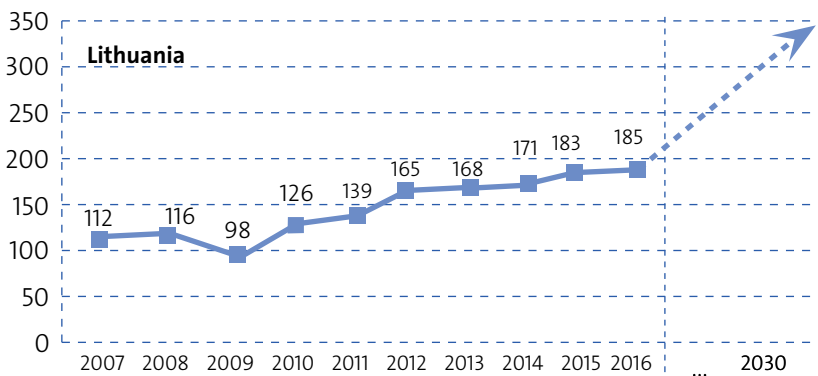
Overnight stays – current and long-term development³
in thousands



- Year 2016: 50,957 arrivals from Estonia / 100,858 overnight stays (camping included)²
- Volume of overnight stays: increase 2015–2016: +2.5%
- Total sales turnover for incoming trips: 0.1 billion Euro (2016)
- DZT forecast until 2030: 0.2 m overnight stays



- Year 2016: 65,350 arrivals from Latvia / 135,794 overnight stays (camping included)²
- Volume of overnight stays: increase 2015–2016: -4.0%
- Total sales turnover for incoming trips: 0.1 billion Euro (2016)
- DZT forecast until 2030: similar to Estonia



- Year 2016: 88,495 arrivals from Lithuania / 184,515 overnight stays (camping included)²
- Volume of overnight stays: increase 2015–2016: +0.9%
- Total sales turnover for incoming trips: 0.2 billion Euro (2016)
- DZT forecast until 2030: 0.4 m overnight stays

Since 2006 the Federal Statistical Office publishes the statistics of overnight stays for each state of the EU separately. Consequently, the three Baltic States are registered separately, too.

MOST POPULAR DESTINATIONS IN 2016

Federal states³ (percentage of all overnight stays)

from Estonia	from Latvia	from Lithuania
rank 1: Berlin with 27.2%	rank 1: Berlin with 27.8%	rank 1: Berlin with 17.1%
rank 2: Bavaria with 19.4%	rank 2: Bavaria with 18.9%	rank 2: Bavaria with 16.6%
rank 3: North Rhine-Westphalia with 12.3%	rank 3: North Rhine-Westphalia with 9.0%	rank 3: Baden-Württemberg with 11.0%
rank 4: Hesse with 7.7%	rank 4: Baden-Württemberg with 8.9%	rank 4: North Rhine-Westphalia with 10.7%

Most popular cities³ (more than 100.000 inhabitants) of the Balts

rank 1: Berlin with 27,451 overnight stays	rank 1: Berlin with 37,728	rank 1: Berlin with 31,566
rank 2: Munich with 6,548	rank 2: Munich with 6,654	rank 2: Munich with 8,421
rank 3: Hamburg with 5,060	rank 3: Frankfurt with 5,103	rank 3: Frankfurt with 7,872

Purpose of all incoming trips

- Holiday trips, business trips, VFR/other trips:
Estonia (46%, 28%, 26%), **Latvia** (55%, 28%, 17%), **Lithuania** (52%, 37%, 11%)
- **Estonia** business trips: 20% traditional business trips, 80% promotable business trips, of which:
 44% conferences/congresses/seminars, 47% exhibits/trade fairs, 8% incentive
- **Latvia** business trips: 31% traditional business trips, 69% promotable business trips, of which:
 55% conferences/congresses/seminars, 42% exhibits/trade fairs
- **Lithuania** business trips: 35% traditional business trips, 65% promotable business trips, of which:
 66% conferences/congresses/seminars, 24% exhibits/trade fairs, 10% incentive
- **Estonia** holiday trips: 10% holidays in tourist regions, 44% touring holidays, 19% city holidays/visit of an event
- **Latvia** holiday trips: 12% holidays in tourist regions, 62% touring holidays, 12% city holidays/visit of an event
- **Lithuania** holiday trips: 28% holidays in tourist regions, 48% touring holidays, 15% city holidays/visit of an event

Booking-behaviour, main mode of transport, accommodation during holiday trips

- Booking in advance: 81% **Estonia** (68% online booking), 79% **Latvia** (72%), 80% **Lithuania** (64%)
- **Estonia**: 37% car, 44% plane, 15% coach
Latvia: 33% car, 29% plane, 33% coach, 4% train
Lithuania: 46% car, 35% plane, 18% coach
- **Estonia**: 65% accommodation paid for (34% hotel)
Latvia: 78% accommodation paid for (53% hotel)
Lithuania: 74% accommodation paid for (49% hotel)

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REFERENCE

World Travel Monitor 2016, IPK International; also:

1 www.cia.gov, www.gtai.de; 2 Eurostat 2017

Supported by:



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on the basis of a decision
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