



# BALTIC DESTINATIONS IN TRAVELLERS' MINDS: AWARENESS ACROSS MARKETS AND BRAND PERFORMANCE

Presentation of selected findings from Destination Brand 25

Ellen Böhling | inspektour (international) GmbH

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## Destination Brand – inspektour



**inspektour**  
TOURISM AND MARKET RESEARCH

# WHAT CAN YOU EXPECT TODAY?

## DESTINATION BRAND 25 at a glance

### Presentation of selected findings: Baltic destinations in travellers' minds

- Unsupported / top-of-mind awareness of Baltic destinations across several source markets
  - Supported country brand results in Germany
- Main reasons to visit Baltic countries among those willing to visit

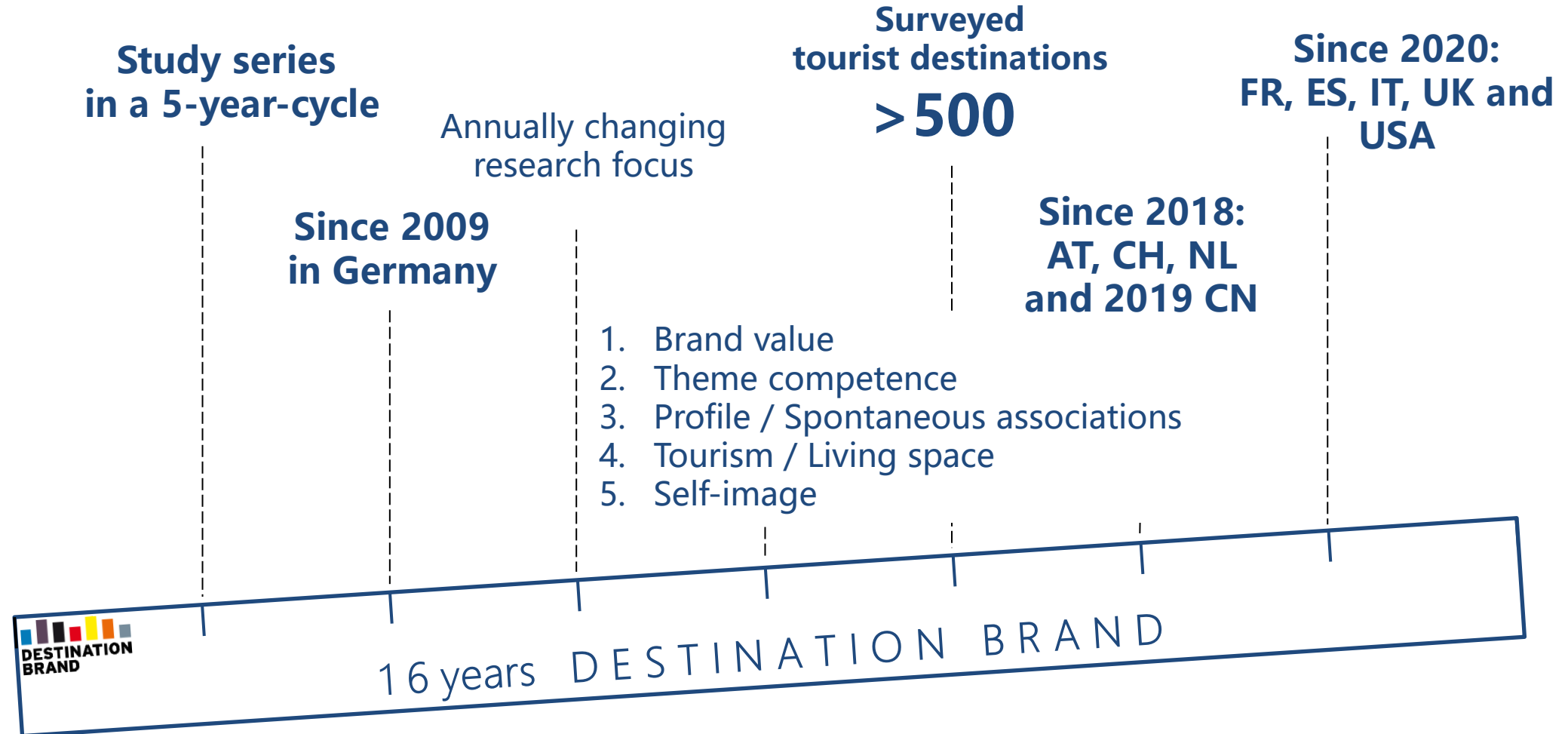
### Implications for destination marketing

### Q&A

## **DESTINATION BRAND 25 at a glance:**

The BrandValue+ and TravelIntent+ of tourist destinations

The study series DESTINATION BRAND



DESTINATION BRAND 25 – at a glance

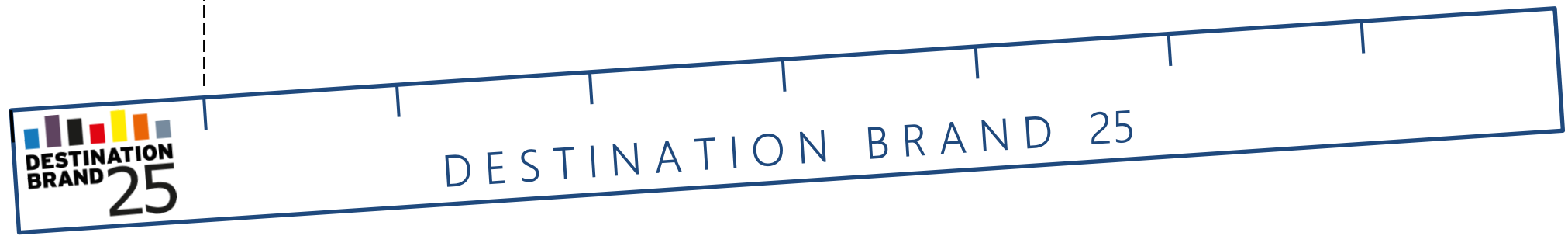
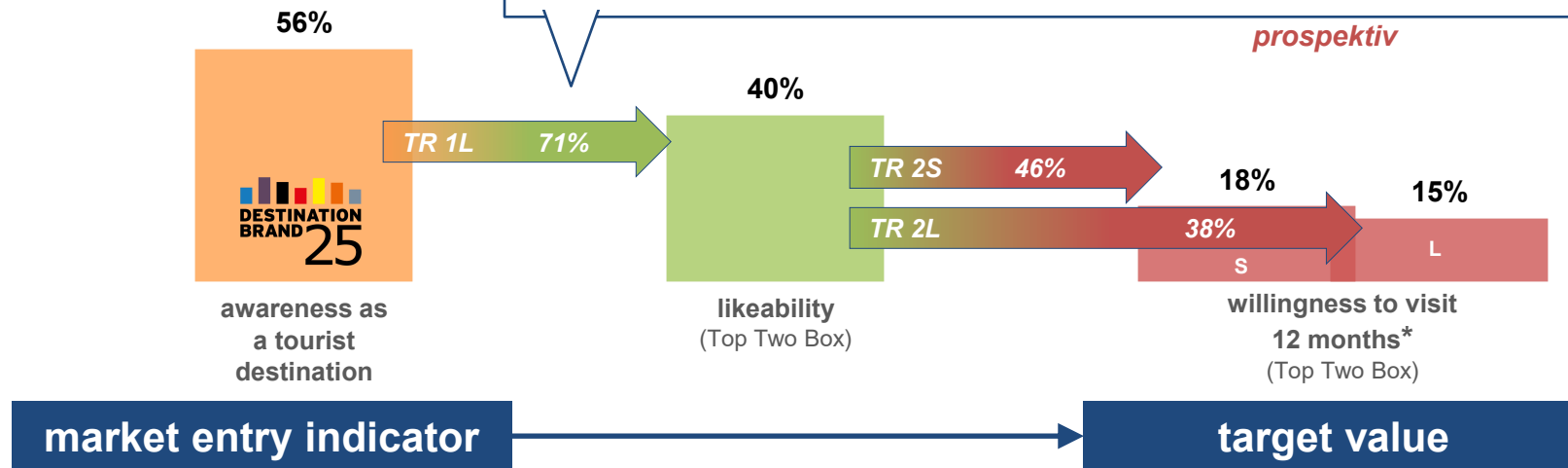
**Process setpoints:**

These figures indicate the proportion of respondents who reach each stage of the funnel. In this example, 56% of respondents are aware of the destination brand.

**Transfer rates (TR):**

Indicates the proportion that moves from one stage of the funnel to the next. In this example, 71% of those who are familiar with the destination also find it likeable.

Basic module:  
BrandValue+



## DESTINATION BRAND 25 – at a glance

**Basic module:  
BrandValue+**

**Additional module:  
TravelIntent+**

**Classification of potential visitors by destination:**

- Interest in holiday activities
- Relevance of holiday motivations/needs
- Relevance of experiential offerings
- Use and frequency of sources of inspiration
- Sociodemographics
- Standard target groups



DESTINATION BRAND 25 – at a glance

**Basic module:  
BrandValue+**

**Additional module:  
TravelIntent+**

**Representative** of the  
local population aged  
between  
14 to 74 years

**Source market DE:**  
Target group analysis  
according to BeST  
holidaymaker types +  
SINUS milieus

**10** source markets

**> 170**  
Tourist  
destinations

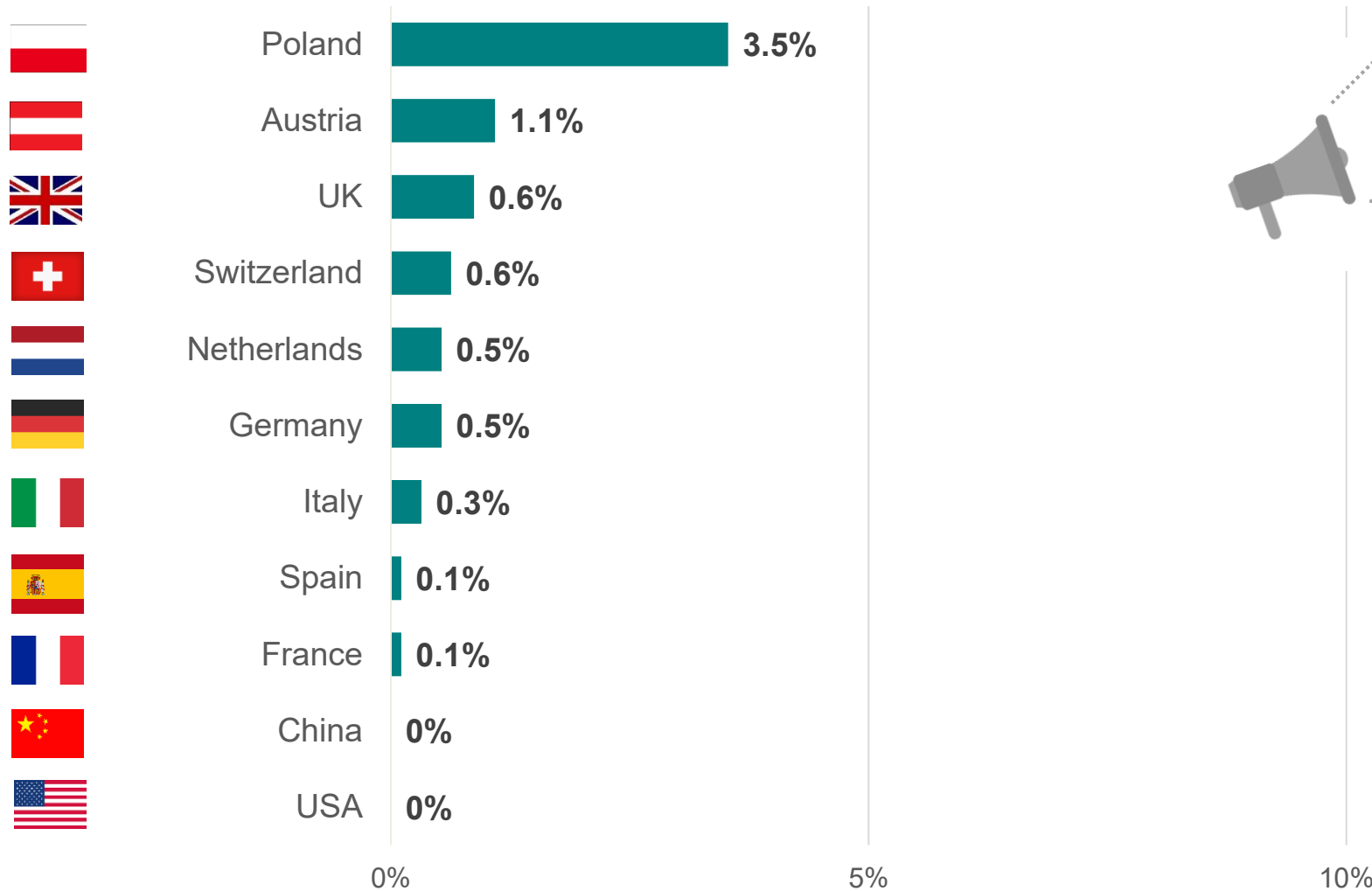
**Online survey**  
Field work: Oct. till Dec. 25



Baltic destinations in travellers' minds

# Unsupported awareness / top of mind

Sum of Top of Mind mention shares of Baltic destinations in % of respondents per source market



**Question:**  
Which international tourist destinations come to your mind when you think about a holiday trip with at least one overnight stay?

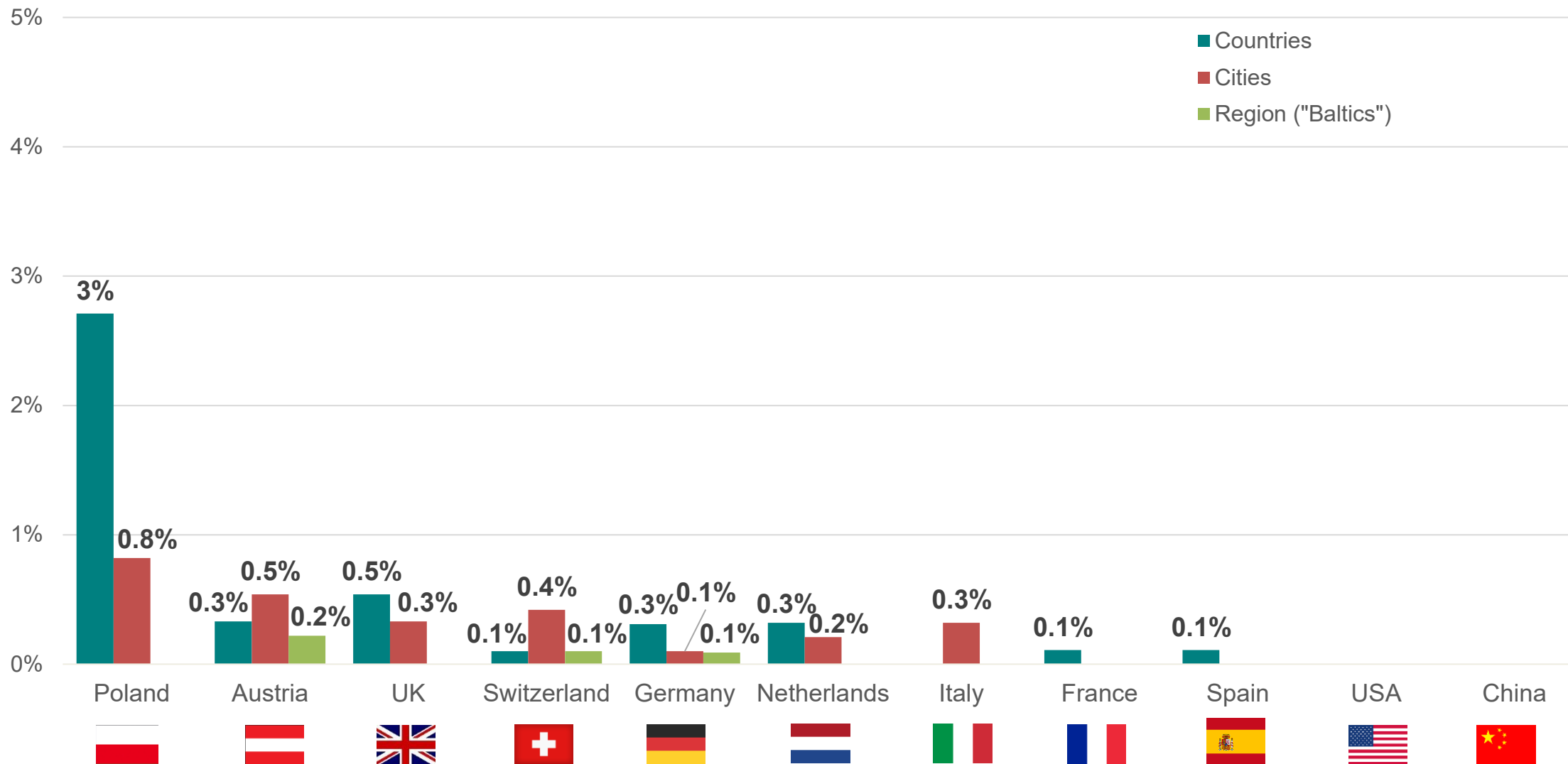
Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, Values are summed mention shares based on % of respondents; they do not represent unique reach

## Sum of Top of Mind mention shares of Baltic destinations in % of respondents per source market

Source market	No. found	Baltic destinations found
DE	7	Estonia; Latvia; Baltics; Lithuania; Riga; Tallinn; Vilnius
AT	6	Riga; Baltics; Lithuania; Estonia; Tallinn; Vilnius
CH	4	Riga; Tallinn; Baltics; Latvia
NL	3	Estonia; Tallinn; Vilnius
PL	5	Lithuania; Latvia; Vilnius; Estonia; Riga
FR	1	Estonia
IT	2	Tallinn; Vilnius
ES	1	Lithuania
UK	5	Estonia; Latvia; Tallinn; Lithuania; Vilnius
US	0	—
CN	0	—

Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, Values are summed mention shares based on '% of respondents'; they do not represent unique reach

# Sum of Top of Mind mention shares of Baltic destinations in % of respondents per source market



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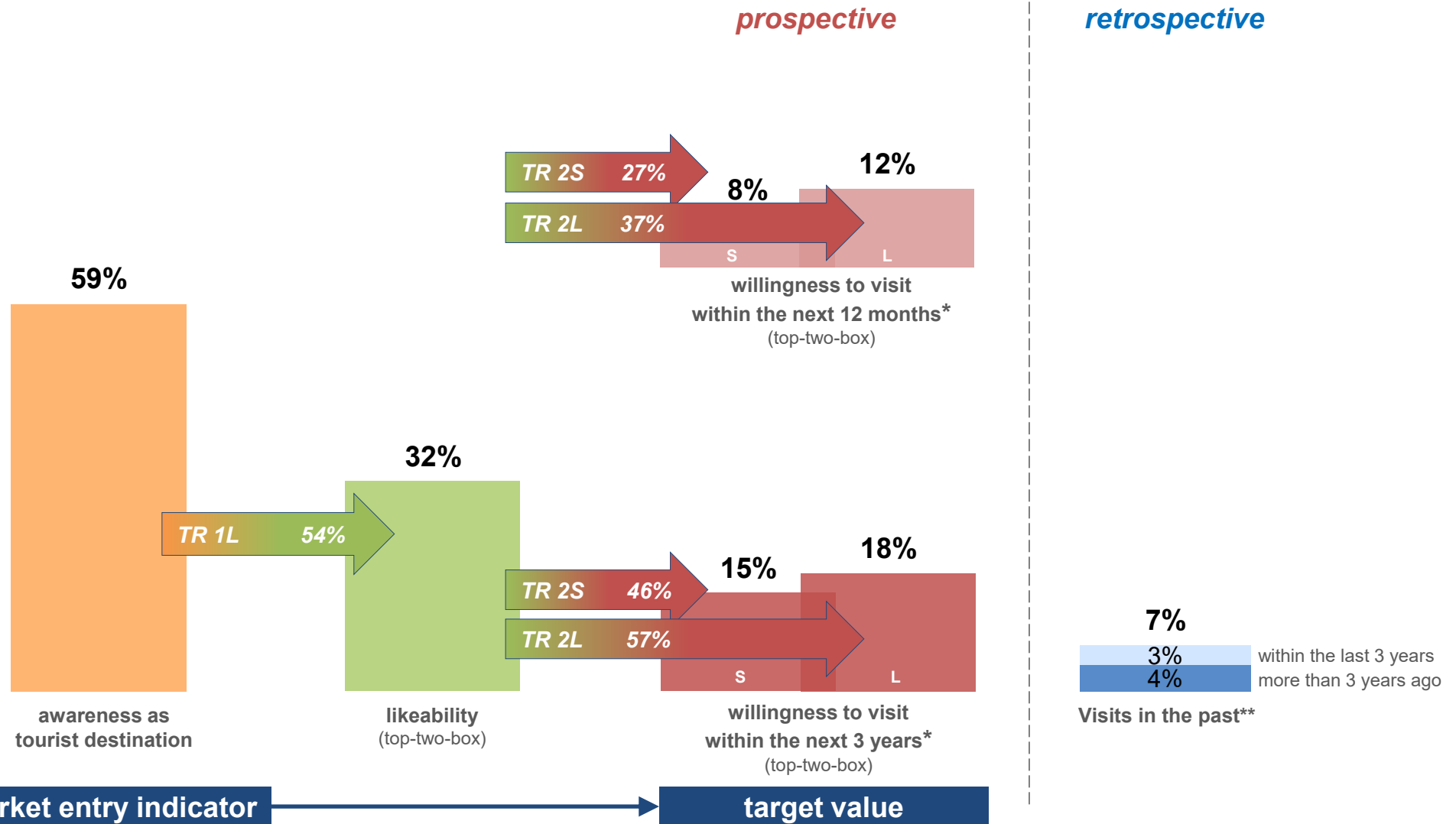


	DE	AT	CH	NL	PL	FR	IT	ES	UK	US	CN
Estonia	1	4		1	4	1			1		
Latvia	2		3		2				1		
Baltics	3	2	3								
Lithuania	3	2			1			1	4		
Riga	5	1	1		5						
Tallinn	6	4	1	2			1		1		
Vilnius	7	4		2	3		2		4		

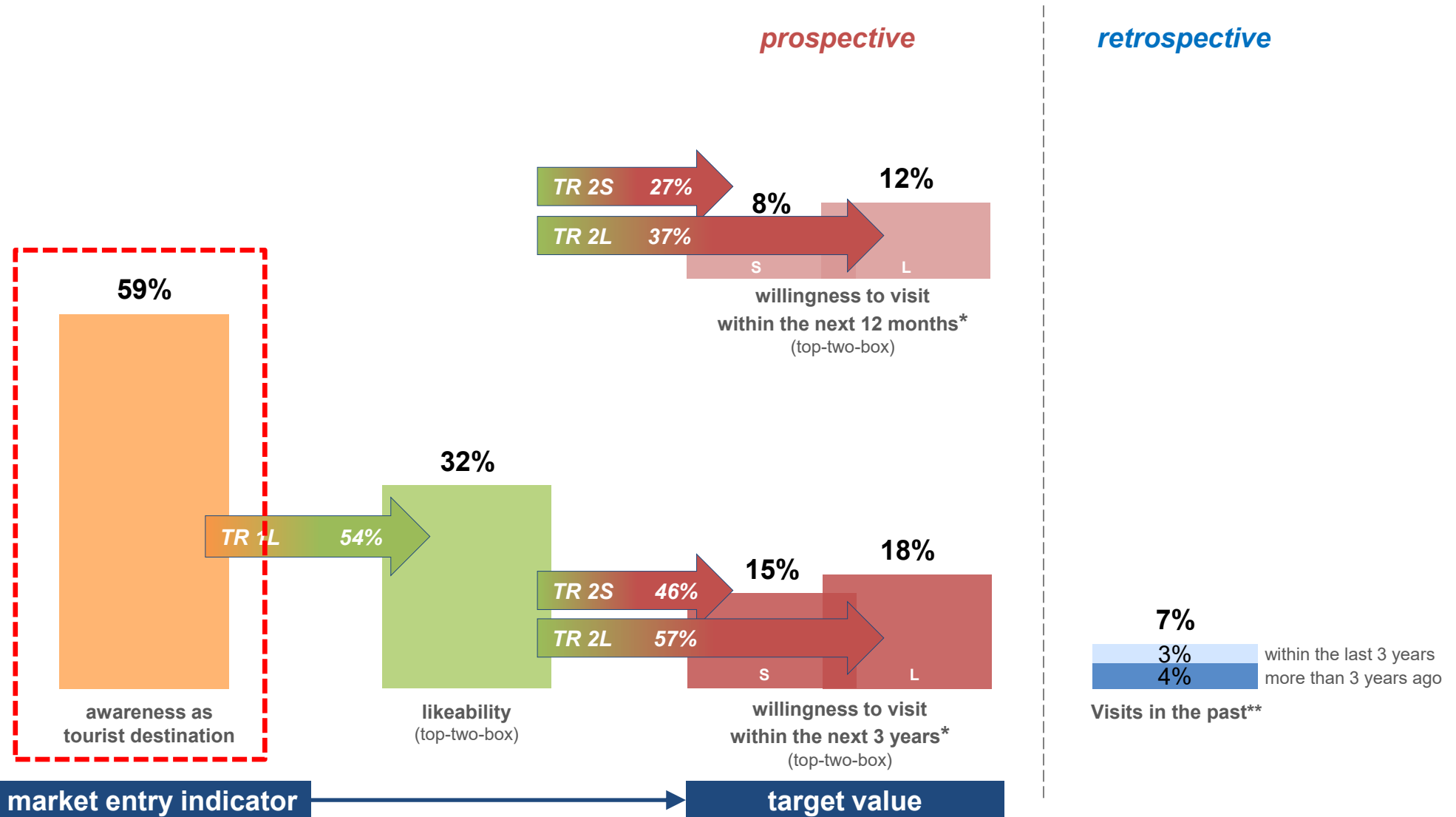
Source: inspektour (international) GmbH, 2025 Base: All respondents with valid answers n = min. 786, multiple answers possible, ranking based on % of respondents

Baltic destinations in travellers' minds

# Brand performance of Baltic destinations



\* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays), \*\* Due to rounding summed values may differ by 1%  
Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents



\* S = Willingness to visit for short trips (with 1-3 overnight stays); L = Willingness to visit for longer holiday trips (with 4 or more overnight stays), \*\* Due to rounding summed values may differ by 1%

Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

## Question to respondents who do not know the destination:

In the following, we will first deal with those international tourist destinations from the previous question that you do not know. Please indicate which of the following two options is applicable in each case.

## Question to respondents who know the destination:

Please also indicate how well you know the international tourist destinations you know.

■ Generally not known

■ Only known as place / region

■ Only by name

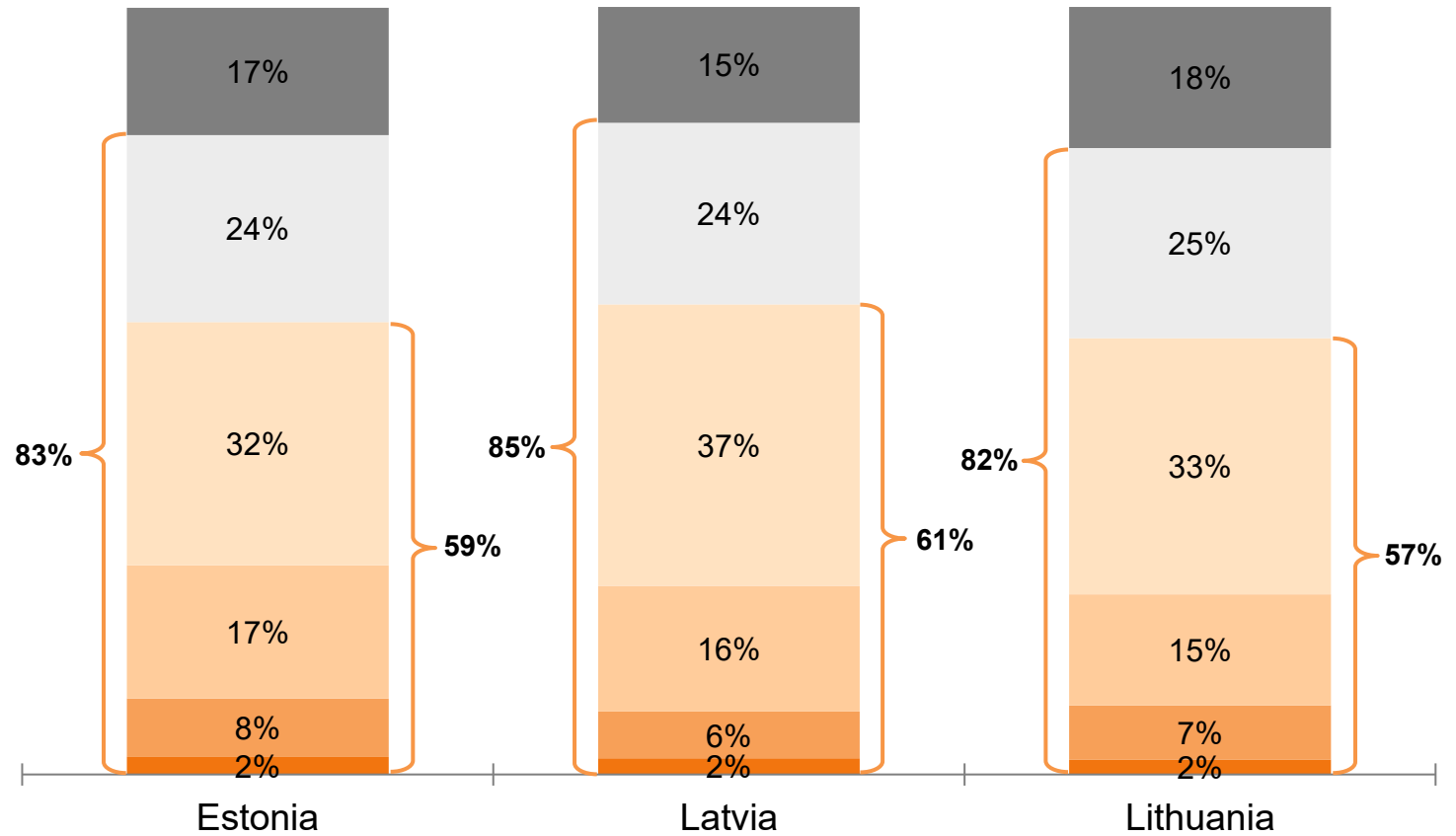
■ Less well

■ Well

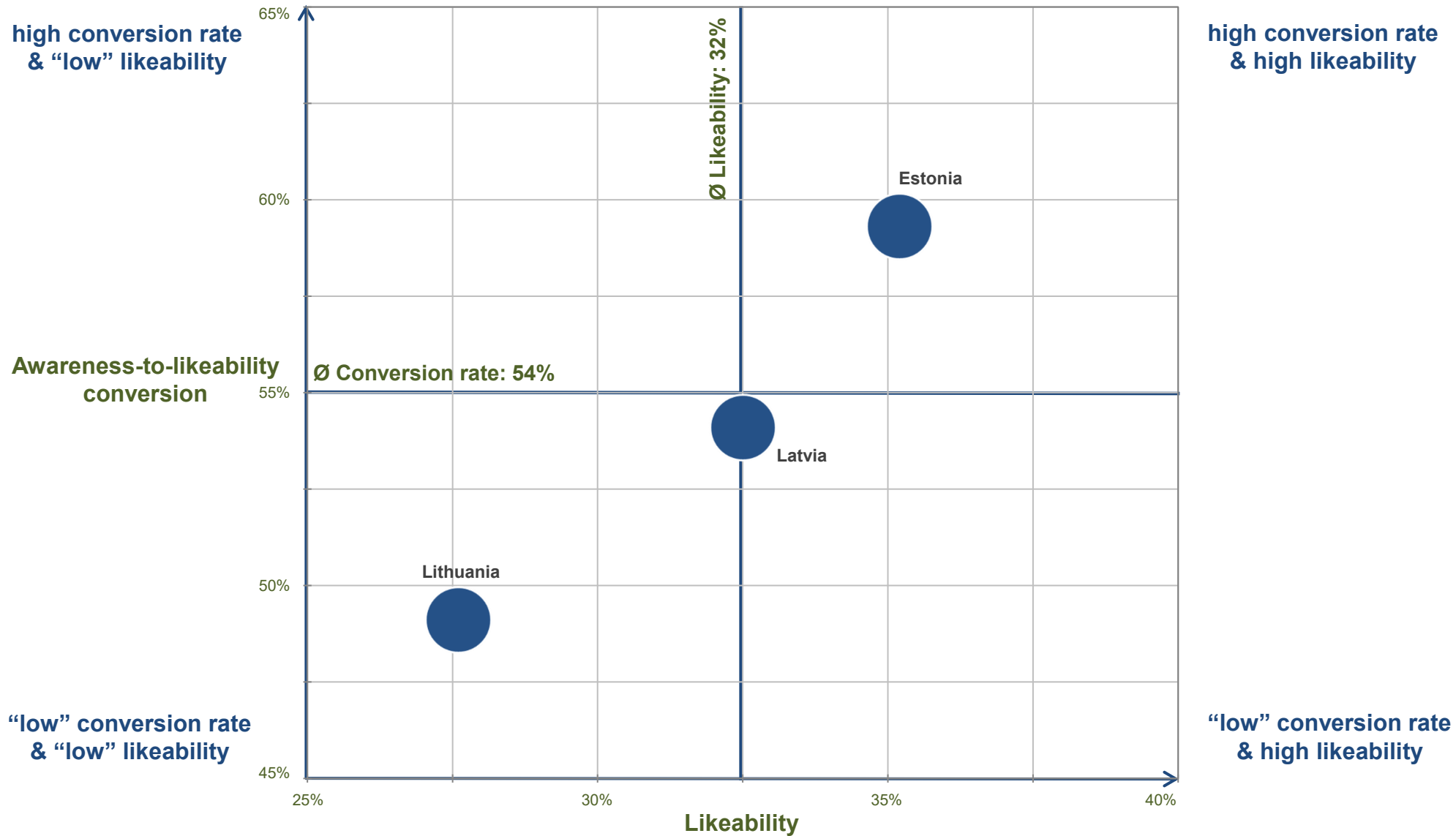
■ Very well

Supported awareness in total

Supported awareness as tourist destination

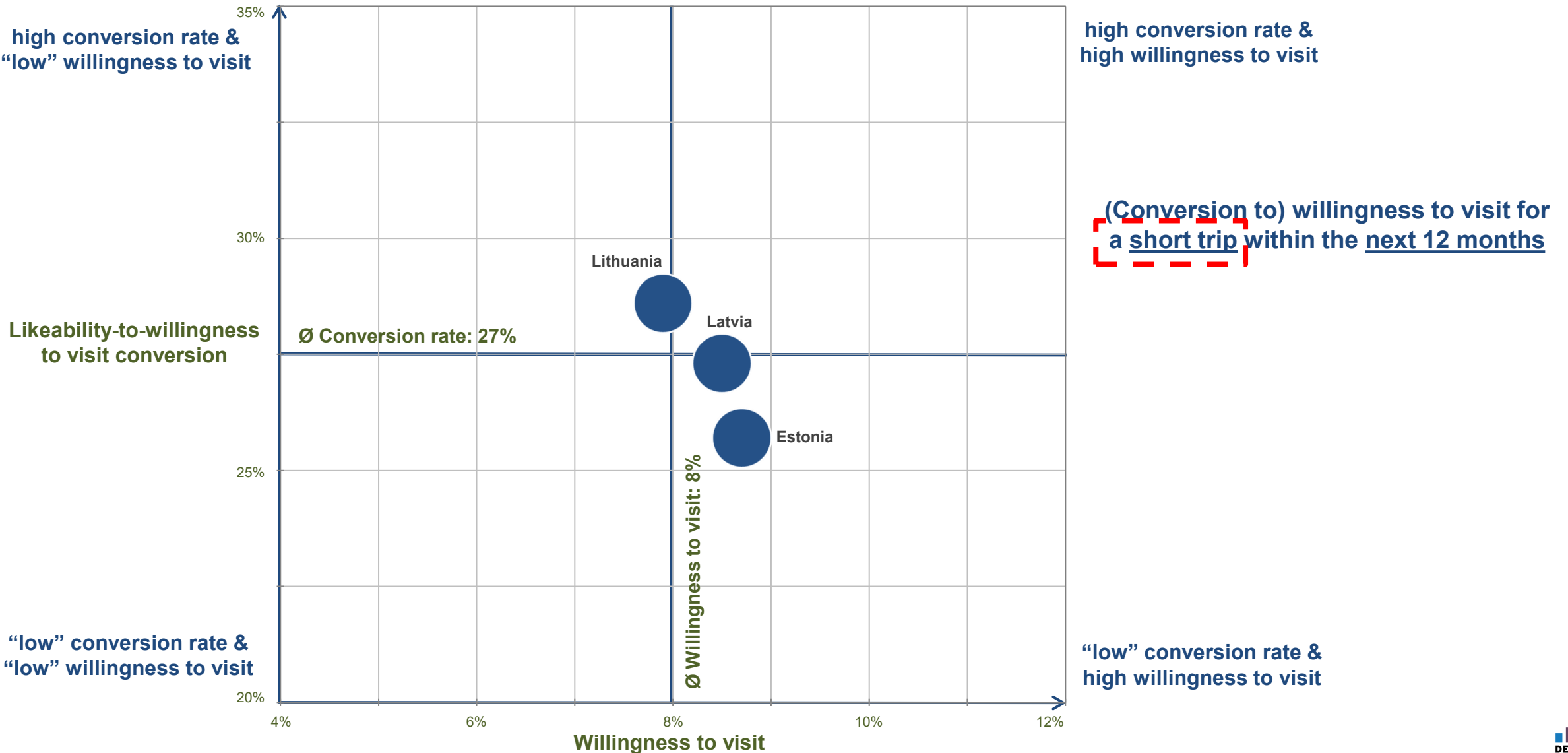


# Likeability of Estonia, Latvia and Lithuania in the source market Germany



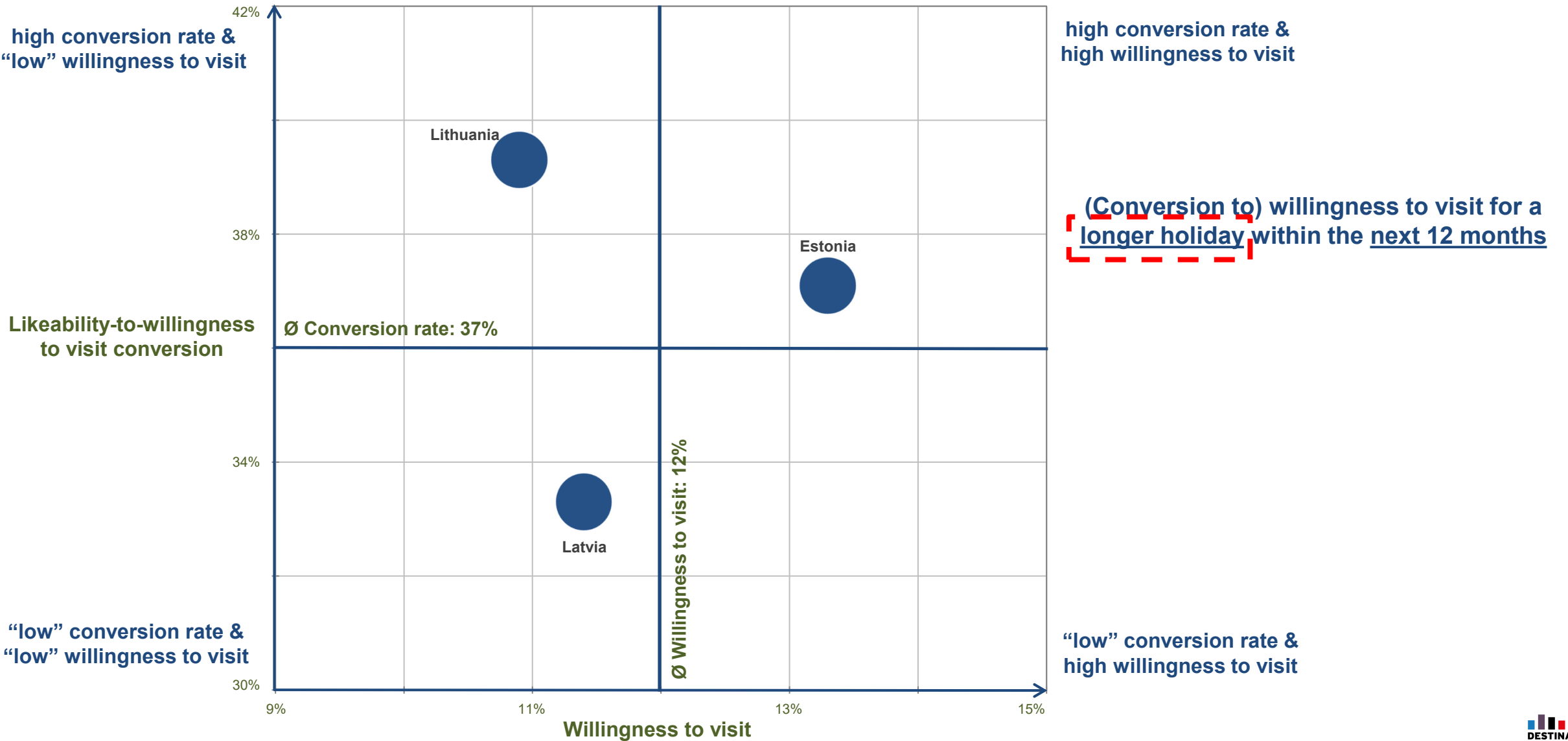
Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

# Willingness to visit Estonia, Latvia and Lithuania in the source market Germany



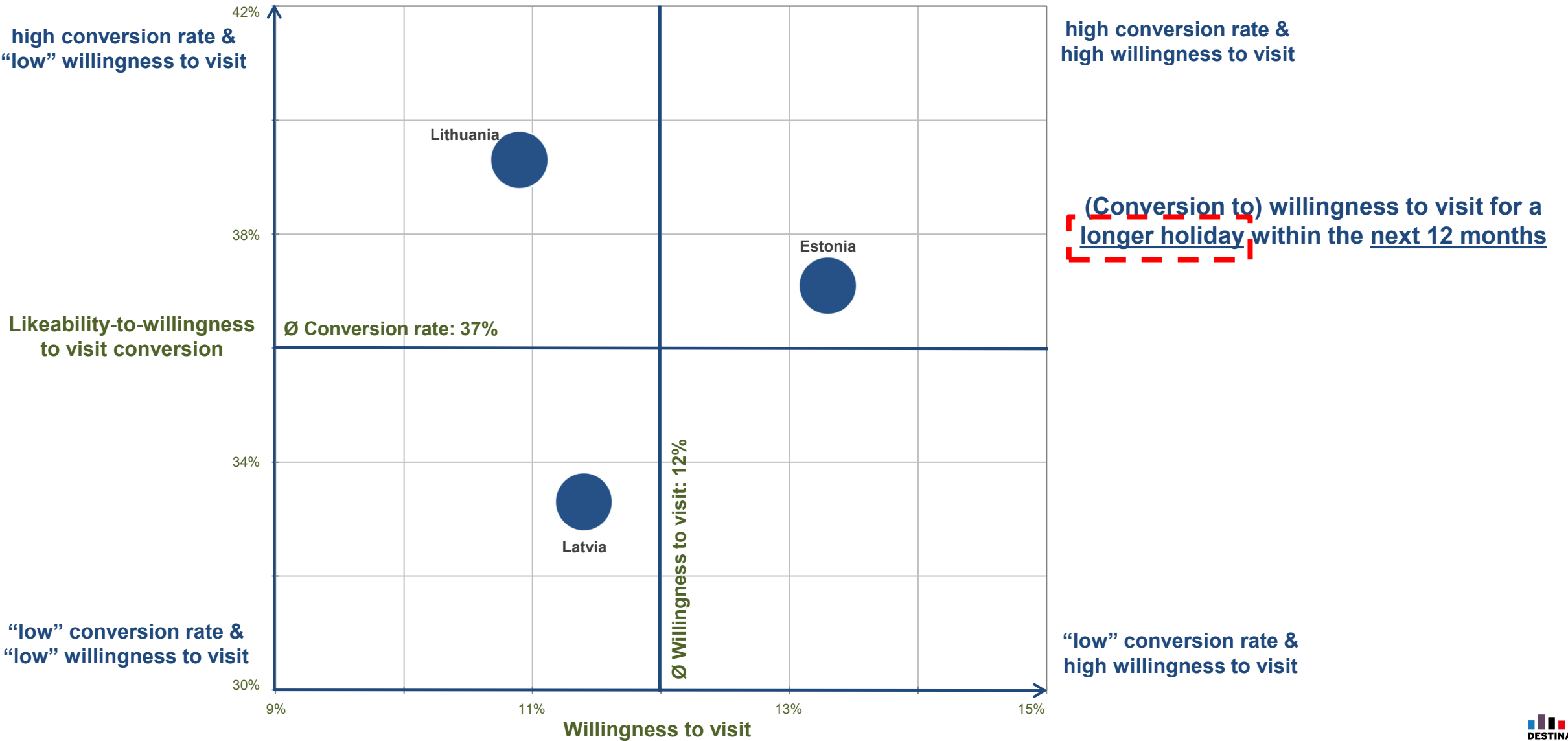
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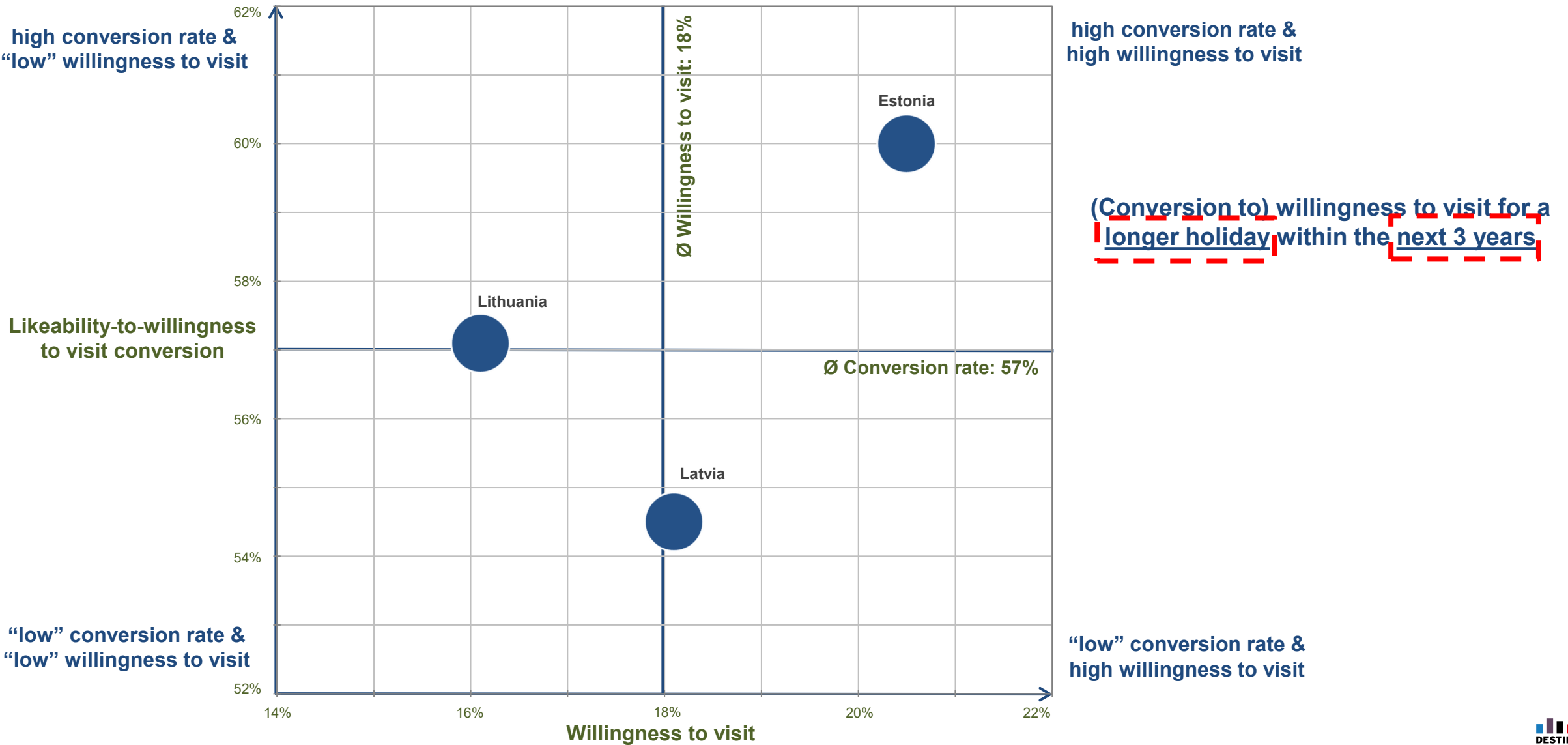
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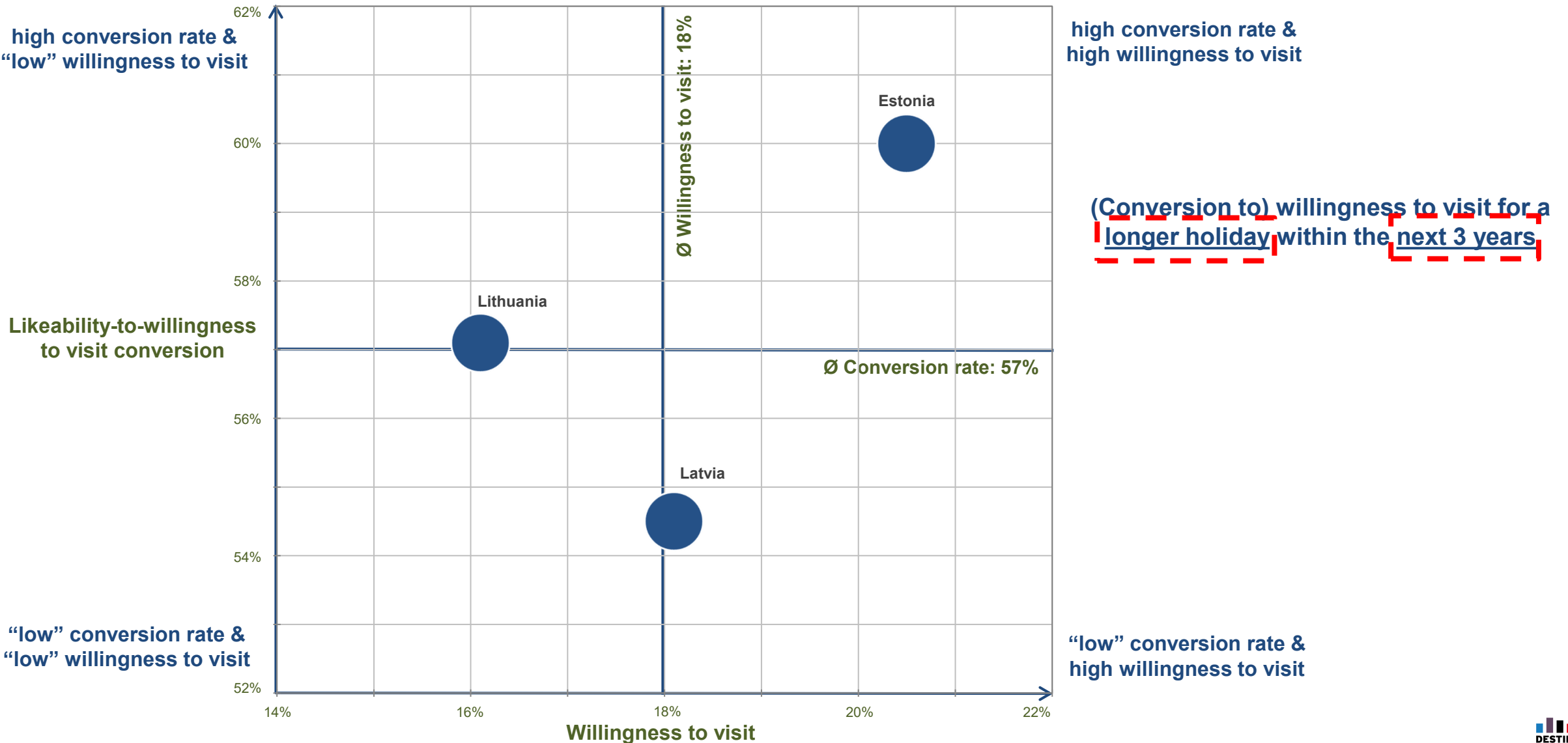
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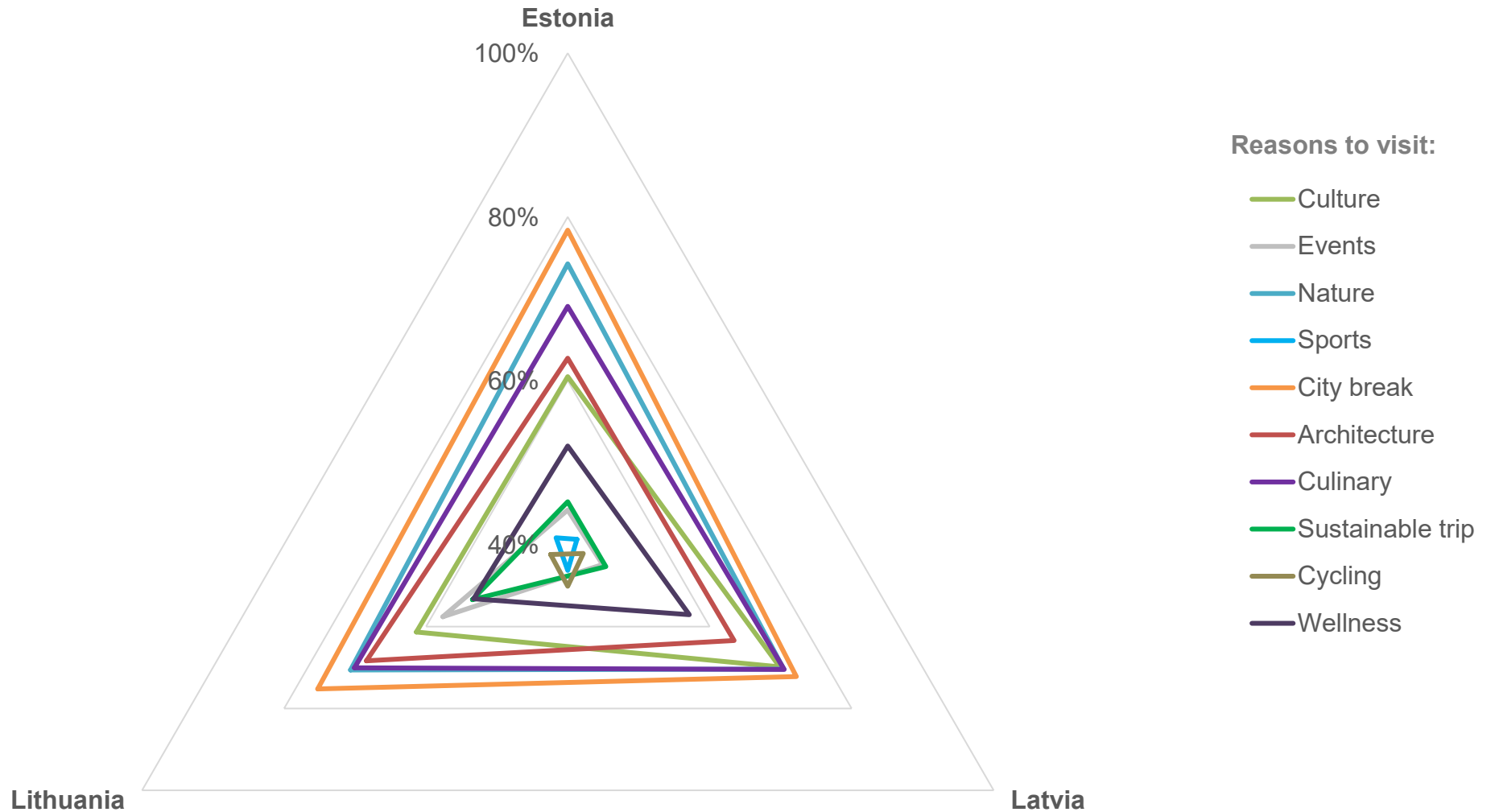
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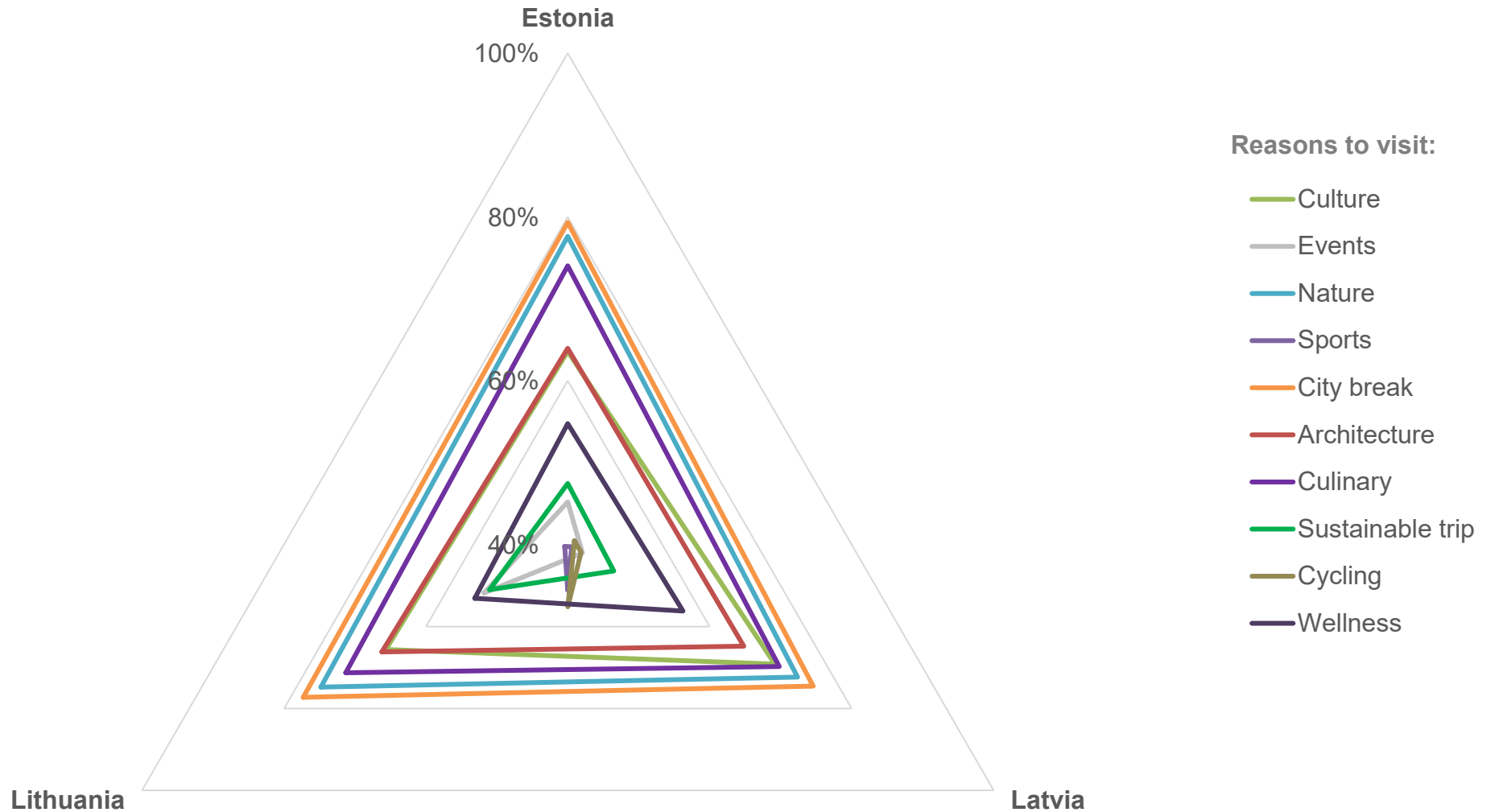
Source: inspektour (international) GmbH, 2025 Base: All respondents n = 1.000 per destination, in % of respondents

Baltic destinations in travellers' minds

# Selected reasons to visit Baltic destinations



Source: inspektour (international) GmbH, 2025 Base: those those willing to visit the selected countries – source market Germany n = min. 124; top-two-box in % on a scale from '1 = not at all considered' to '5 = definitely considered'



Source: inspektour (international) GmbH, 2025 Base: those those willing to visit the selected countries – source market Germany n = min. 161; top-two-box in % on a scale from '1 = not at all considered' to '5 = definitely considered'

# Baltic destinations in travellers' minds

## **Implications for destination marketing**

### Build basic mental awareness in selected source markets

- Poland is the strongest top-of-mind market
- many markets show only very selective spontaneous recall
- country names & capital cities can both serve as entry points

**Spontaneous Baltic awareness is selective — marketing needs clear entry points by market.**

### Move from name awareness to travel relevance

- overall awareness above 80%
- high shares know the countries only by name / generally
- stronger imagery and emotional reasons to visit can support likeability

**Many Germans know the Baltic countries — but the image as tourist destination needs to become more concrete.**

### Prioritise longer-holiday and round-trip logic

- willingness to visit for longer holidays is higher than for short trips
- 3-year potential is clearly stronger than immediate 12-month potential
- connected routes and thematic itineraries can support planning and consideration

**The stronger opportunity lies in longer trips and medium-term consideration.**

### Sharpen each country's role within the wider Baltic story

- Estonia: city break + nature + culinary
- Latvia: culture + wellness + cycling
- Lithuania: architecture + events + sustainable travel
- shared base: city, nature, culinary, culture and architecture

**Use the shared Baltic frame — but highlight each country's strongest experience cues.**

## Imprint

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