

Baltic Nature Tourism

UK Market Update and Plans



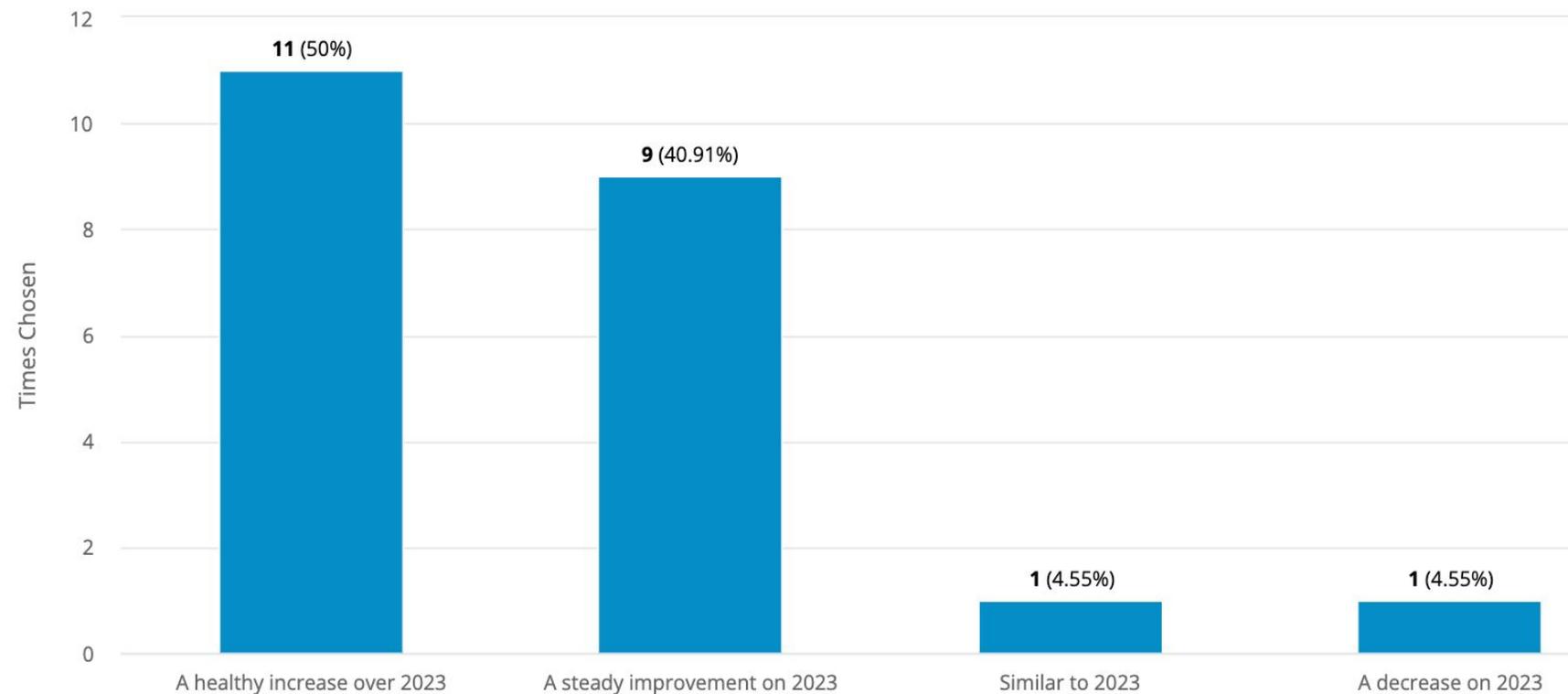
Agenda

1. Update from the UK Market
2. Nature tourism demand and trends from the UK
3. Product trends
4. Activities 2024
5. Upcoming activities - UK 2024
6. Captains Cruise and nature session
7. Demand and plans 2025

UK Operator survey

How is 2024 looking for the Nordic & Baltic destinations in general?

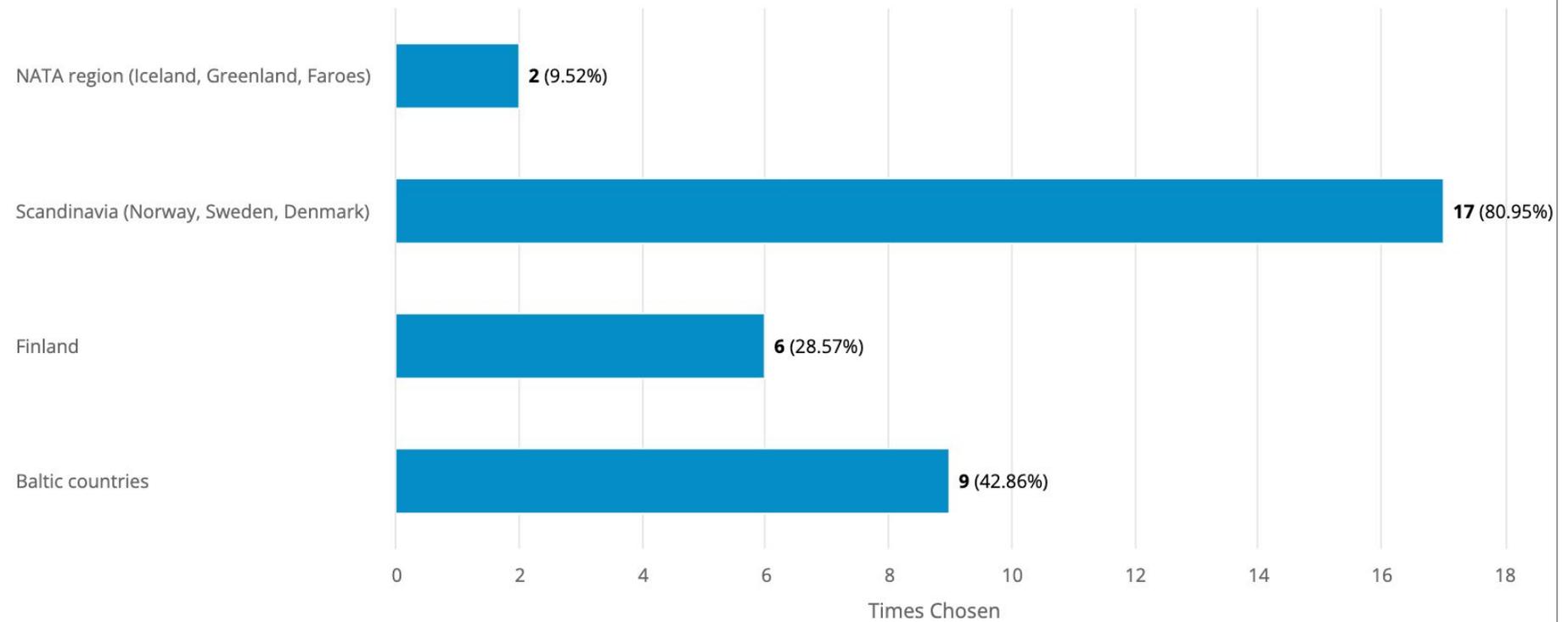
Number of responses: 22



UK Operator survey

Which destinations are performing (selling) particularly well?

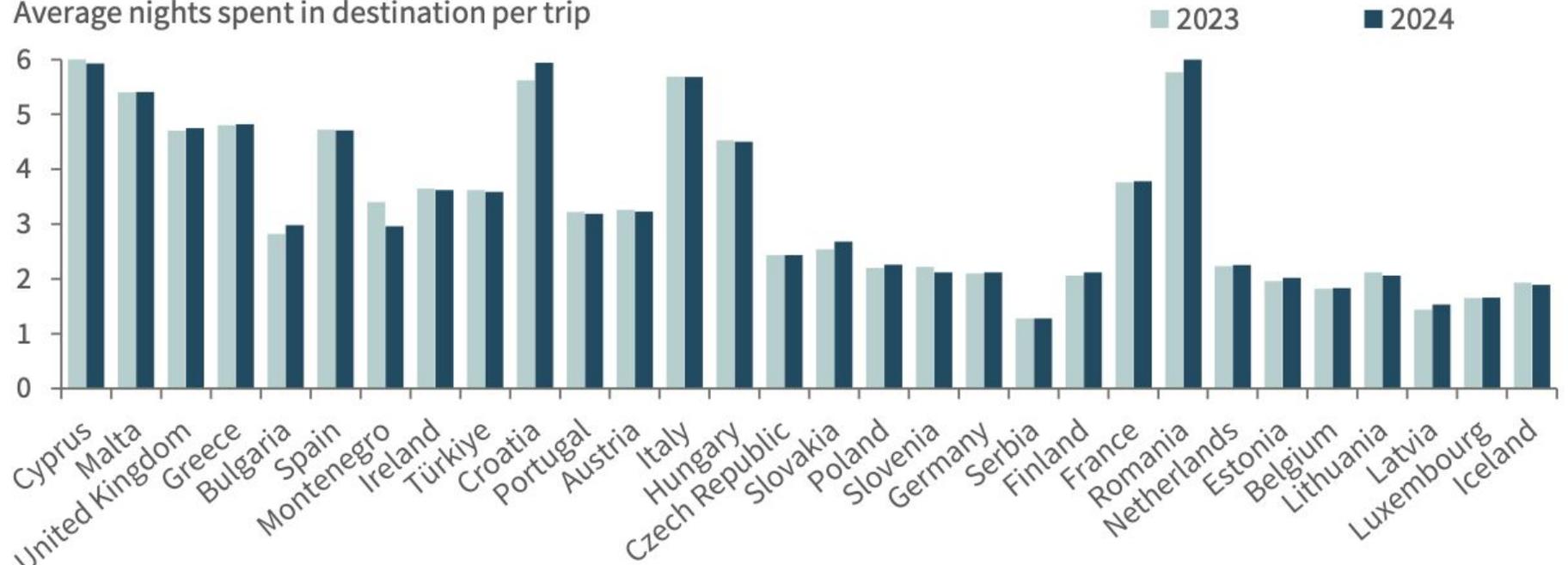
Number of responses: 21



2024 - Year to date

Average length of stay in European destinations

Average nights spent in destination per trip



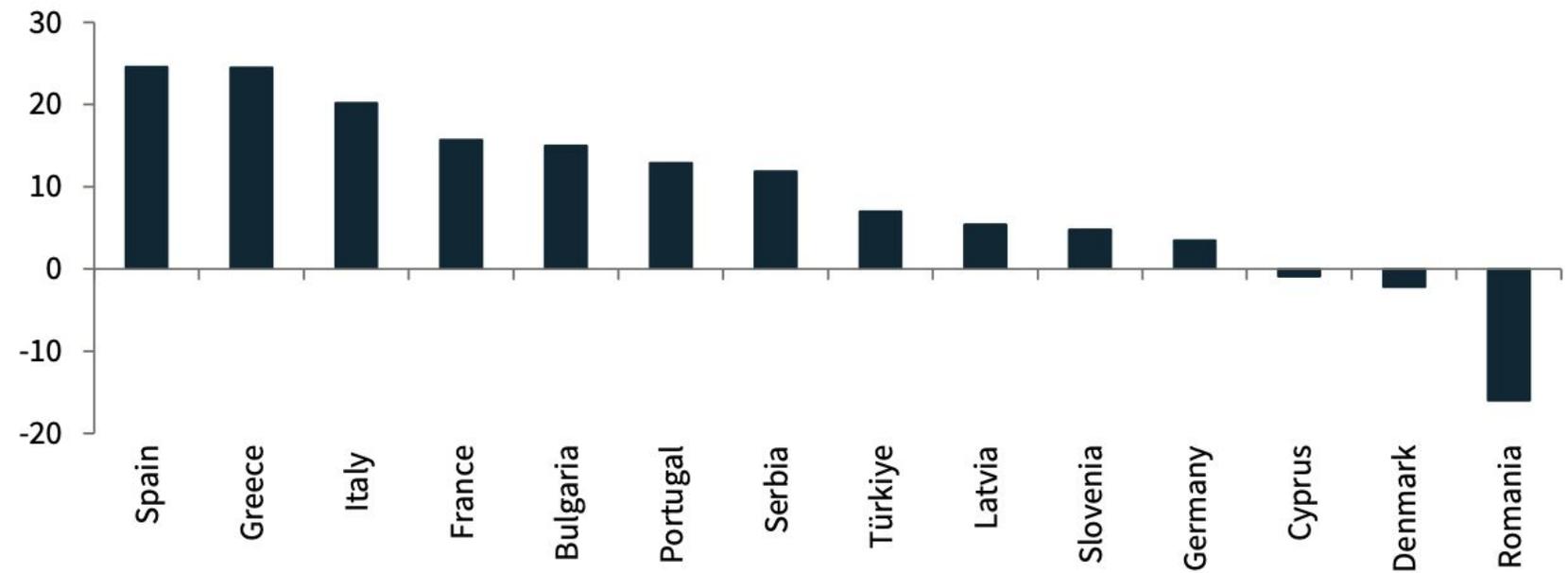
Source: Tourism Economics



2024 - Year to date

Inbound travel spend in selected destinations

2024 year-to-date, % change relative to 2019 levels



Source: UN Tourism

Value for Money

Cost is still key when booking a holiday

UK travellers are looking for **value for money**

Quality products and services at affordable prices

Over a 25% of UK travellers have budgeted to spend more on travel in 2024 compared to 2023

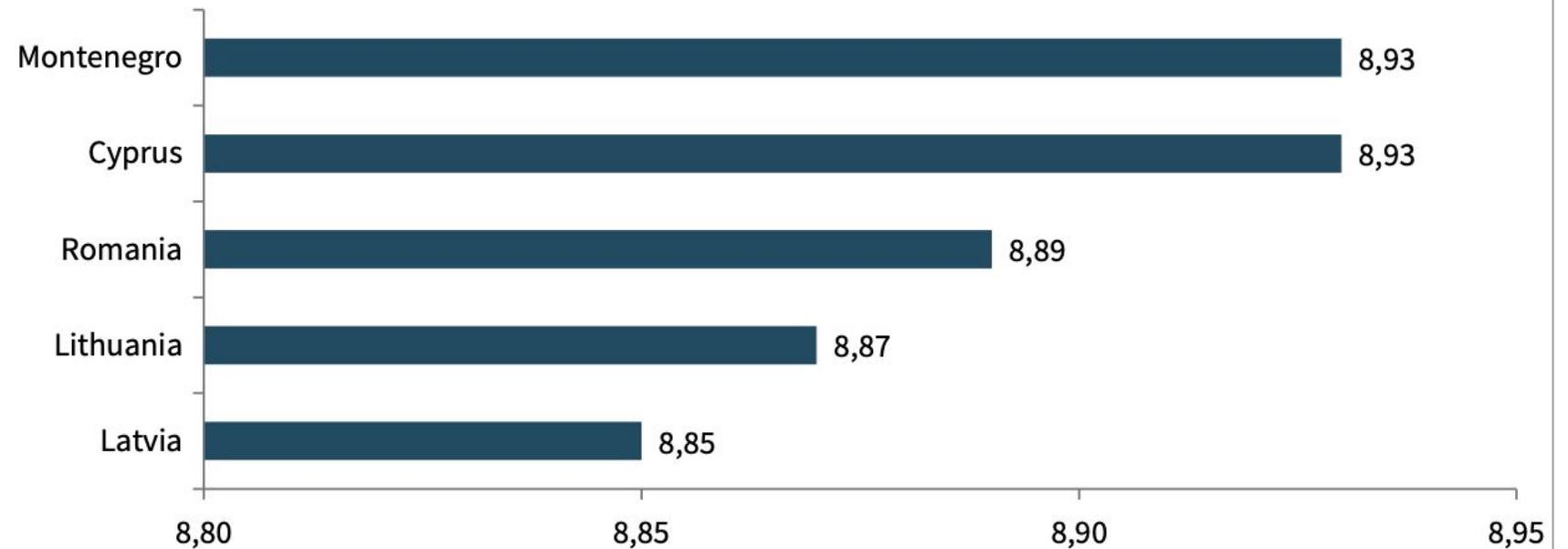
41% will spend the same

According to the ETC report in Q2 2024, Latvia is in the top 5 European countries for receiving most praise in terms of value for money in guests written reviews



Year to date - 2024

Destinations receiving the highest sentiment scores on the topic of value for money during April and May 2024



Source: MMGY TCI Research

Trade market trends

Increasing interest in **temperate destinations** in summer

Increasing interest in **natural wellness**

More sustainable tourism and sustainable products and services

Increasing interest in **Nature and Wildlife Watching**

Increase demand for customisation and personalisation

Increase in specialist programmes

Aging population & need to consider accessibility

A word about 'Coolcations'

After the impacts of climate change and disasters in Southern Europe, the concept of Coolcations has emerged.

Any continued signs in 2024?

- **Mediterranean not hitting quite the same temperatures this summer**
- **Less natural disasters in 2024**
- **UK enjoyed its coolest summer for many years!**



Cooler beaches & Island escapes

Nordic/Baltic an alternative to the Med

Short haul, untouched beautiful beaches

Various Spanish destinations seeing protests about over-tourism

Remote retreats to escape the crowds

i Europe's secret, mild-weather islands – without the summer crowds

Forget hotter, tourist-filled islands or the Med, these alternatives around Britain, Scandinavia and Germany offer scenic surrounds

The Standard

IS SCANDINAVIA THE NEW MED?

Mirror

Best holiday destinations if you want to avoid Europe's punishing heatwave

Spain, Italy, Greece and France are boiling in what could be the record breaking and dangerous heatwave Cerberus, making them a little too hot to handle as holiday destinations

TRAVEL+ LEISURE

20 Cool Destinations for When You Just Can't Take the Summer Heat

Escape the dog days with a breezy vacation.

 The Independent

Hoteliers call for urgent plans to tackle overtourism in Mallorca

Traveller

Where is cool in July? Our top 10 destinations

From wintry islands to cities with cooler climes

INDEPENDENT

Travel > Europe

Beat the heat: The 'cool' European destinations to visit in summer 2024

Here are the temperate alternatives to European hotspots that keep it cool – even in peak season

The Telegraph

The 'Caribbean of Europe' – where luxury hotels cost less than £100 a night

With its turquoise waters, white sands and (imported) palm trees, the Albanian seaside town of Ksamil offers a budget version of the tropics

THE TIMES

OUTSIDE

The UK's best 20 walks to do this bank holiday weekend

Get prepared! Times walks correspondent Christopher Somerville shares his favourite routes with printable maps to pack before you go

The Guardian

The age of extinction

'More profitable than farming': how Ecuador's birding boom is benefiting wildlife

With hundreds of highly prized species, bird tourism is thriving in the country - and farmers are increasingly turning their land into nature reserves

By Stephen Moss

Why birdwatching is the perfect hobby for Gen Z

There is a long-held stereotype that birdwatching and spending time in nature is for older generations

THE TIMES

GLAMPING

The quirky Estonian glamping trend that you can now do in England

Mirrored high-tech Ood cabins with hot tubs have been booming in the Baltics and now's your chance to try them too - all on home soil

Nature immersion & wellness

Reconnecting with nature

Rediscovery of the mental and physical health benefits of the outdoors and soft adventures.

Best Day Walks to Hiking Holidays

Cycling from MAMILS to bike rides

Open Water - Wild Swimming

UK Pop-up Sauna Experiences

Wildlife watching, including Birding

For the love of trees - a predicted autumn trend with

Lonely Planet's new title and Levison Wood's new TV

show



NATIONAL GEOGRAPHIC

TRAVEL

7 of Europe's best cycling holidays for families

Cycling holidays in the UK and Europe have never been easier for families, with trails to suit every ability from tots to teens.

The Guardian

Hot ticket: 10 of the best pop-up saunas in the UK

The cleanest countries in Europe for fresh air and swimming

Only seven nations meet world air pollution guidelines - and three of them are Estonia, Finland and Iceland. Here's how you can have a clean break



Product Focus (what operators look for)

Nature, Culture, Culinary (underpinned by sustainability)

Nature immersion experiences and activities

Natural wellness (including sauna)

Wildlife watching

Self drive and EV

Personalised programmes

Gastronomic and exclusive experiences



Adventure tourism

The United Kingdom is the **largest adventure tourism market in Europe**, according to the World Tourism Organization, with 19% of the world's adventure travel tourists. **Adventure sports and water sports activities have increased by 75% in the last 10 years**

A recent Visit Britain survey concluded that **40% of British tourists prefer sports and active holidays.**

Interest in active and nature tourism is significantly growing among **millennials as well as senior travelers.**

When planning their trips, they are more often seeking to incorporate activities such as mountain biking and canoeing. In addition, the desire to try more adventurous activities.



Experiential and Wildlife Tourism

Expected growth in adventure travel between 2019 to 2026 is 13.3%

Adventure seekers increasingly opt for walking activities in itineraries.

The United Kingdom, Germany, and France are the most important European source countries for wildlife tourism

Wildlife watching is becoming increasingly popular among British tourists.

The United Kingdom is the largest European wildlife tourism source country.

Average length of stay - British international traveller is 10 nights.

Most profitable age-group is 25 and 55 years old, with little difference in expenditure within this age range.



UK Operator survey

Rank	Choice	Distribution	Score
1.	Winter		46
2.	Culture tourism		40
3.	Nature tourism		34
4.	Culinary & gastronomy		29
5.	Off-season (shoulder)		24
6.	Cruise		17
		 Lowest Highest	



2024 - Year to date

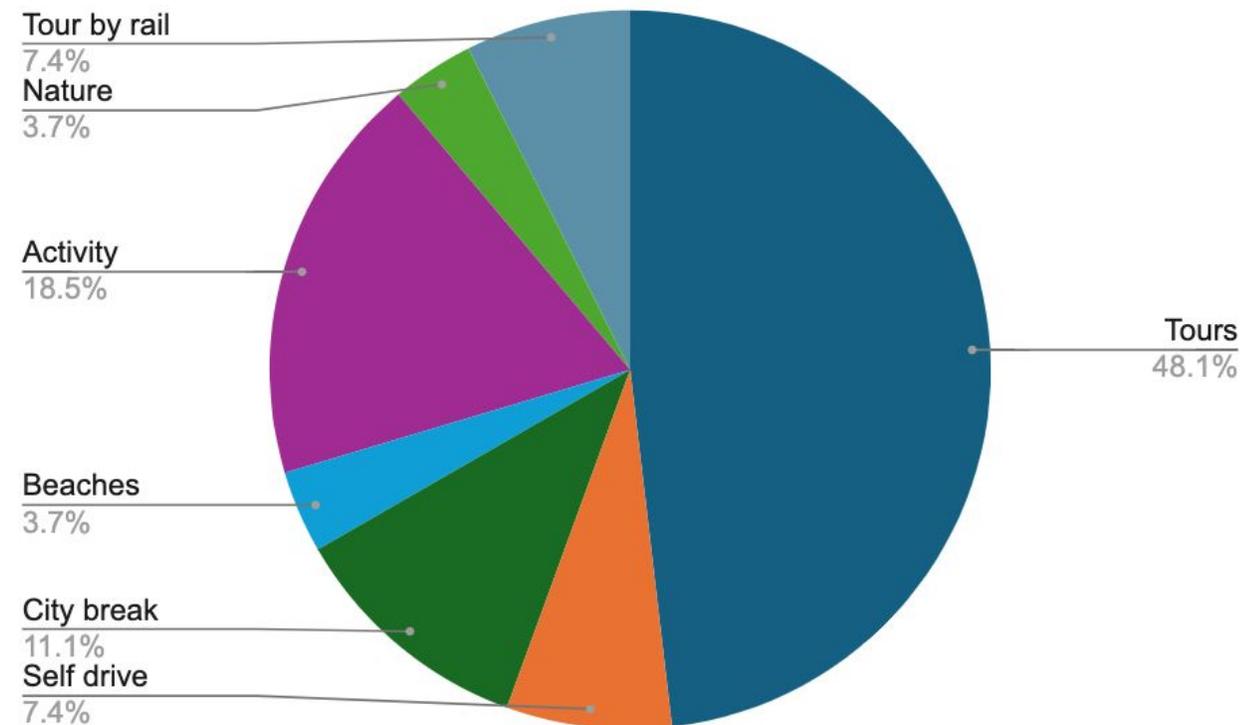
New European Travel Commission findings

- The attraction of lesser known destinations
- Islands in particular
- Rugged terrains
- Abundance of wildlife
- Cabins and lodges



Industry environment*

Holiday type



**based on the top 20 specialist tour operators to the Baltic region*

UK Market Assessment - summary

The UK market remains resilient

Holidays remain a priority for consumers again in 2024

Despite economic constraints, the UK consumer continues to show keen interest in exploring new destinations

High income households less affected by cost-of-living increases

New experiences and cultural experiences are driving the UK Outbound market

Active and soft adventure holidays very much in demand

Sustainability is becoming a consideration, but not a driver of bookings



2024 Activities

Networking reception - Latvian Embassy in London

18 Apr 2024, 15:00 – 17:30

Embassy of the Republic of Latvia, London

35 Tour Operators/Agencies

06 Media

Latvian Chef with amazing local produce

In collaboration with LIAA

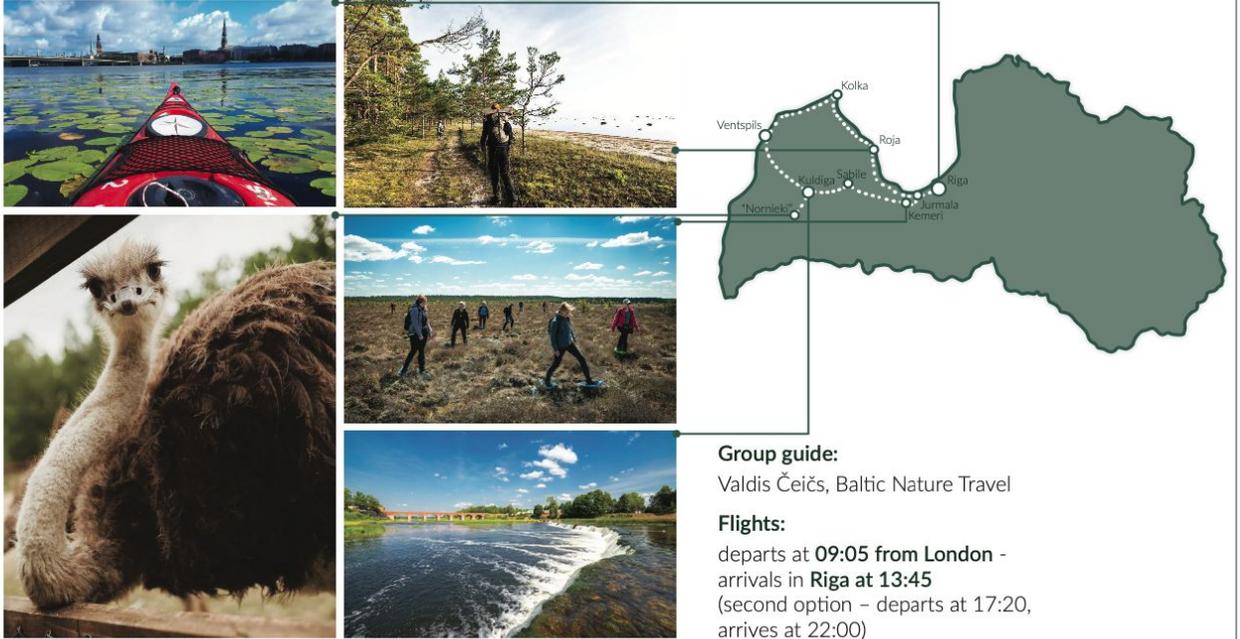


2024 Activities

Latvian Fam Trip

Extremely positive feedback from participants

Baltic Travel Company
Luxury Tours
KewBridge Travel
Magnetic North Travel
Minty Highway Ltd
Naturetrek
Regent Holidays
Steve Newman- Media



Group guide:
Valdis Čeičs, Baltic Nature Travel

Flights:
departs at **09:05** from London -
arrivals in **Riga** at **13:45**
(second option - departs at 17:20,
arrives at 22:00)

2024 Activities

Newsletters

BALTIC NATURE TOURISM
NORDIC TOURISM COLLECTIVE
Newsletter #2 SPRING




Welcome to our 4th edition of Baltic Nature Tourism's newsletter. As spring approaches, the Baltic region blossoms with exciting outdoor activities. Keep reading to learn about the various outdoor activities available in the beautiful Baltic region this spring.

Dear

What's new in 2024?

We would like to introduce you to a range of multi-day packaged tours suitable for individuals and groups travelling to Latvia and Estonia featuring a variety of nature tourism activities. Primary among these are **hiking, boating, cycling**, allowing participants to experience the natural beauty of these countries. The tours are organised by local tour operators, ensuring high-quality experiences. The offered tours allow one to choose between absolutely independent, self-guided or guided tours. Check out more online and see you outdoors! balticnaturetourism.com

Easter Celebrations in the Baltics

Easter celebrations blend Christian traditions with pre-Christian spring solstice customs, observed in March or April around the spring equinox. In the countryside, festivities that once held ritual significance are now enjoyed for fun. A popular tradition is installing large swings to swing high, symbolising the sun's ascent. Eggs are traditionally dyed for Easter, often using onion peels to achieve a deep brown color, symbolising the earth and renewal. Smaller and bigger towns and cities host celebrations with these traditions, including swinging, egg dyeing, and abundant singing, inviting both locals and guests to partake in these joyous spring rituals.



Valmiermuizas Craft Brewery

We recommend visiting Valmiermuizas Craft Brewery to experience a vivid and fulfilling Easter celebration, to taste the local goods, birch and maple saps and enjoy the local traditions.

<https://valmiermuiza.lv/en/pages/valmiermuiza-1>

Bird Watching in Kolka Cape

Cape Kolka in Sillene National Park, is a prime birdwatching destination situated on a 370 km migratory path along the Baltic coast. Almost all of Latvia's bird species can be seen here in spring, with the coastal waters and the Strait serving as crucial feeding grounds for migrating and wintering waterfowl. The best birdwatching period is from late February to late May, peaking in April and early May.

Tour example - Bird watching in Kolka Cape

You can expect to see about seven species of woodpeckers, six species of owls, two species of crossbills, and at least 14 species of raptors, including the lesser-spotted eagle. The tour is flexible and can be adapted to fit the interests of our group, offering a friendly and informative experience for all bird lovers.

<https://balticnaturetourism.com/en/tour/kurzemes-pusni-bird-watching-sillene-national-park>

BALTIC NATURE TOURISM
Latvia - Estonia
Newsletter Nr. 5
SUMMER




Dear

Midsummer Magic in the Baltic

Win the Baltic, Midsummer blends ancient customs with joyous gatherings, marking the year's longest day and the shortest night. The Summer Solstice on the June 21st precedes Latvia's Jāņi and Estonia's Jāņpavēljans celebrations around June 23rd and 24th. These festivities, rooted in pre-Christian traditions, feature bonfires, symbolising purification and the sun's power, and the weaving of flower and oak leaf wreaths, denoting life and strength.

Latvians and Estonians embrace the night with singing, dancing and communal meals, highlighting their deep bond with nature and culture. The mystical ten tower represents luck and happiness, adding mystery to the shortest night. These celebrations reaffirm connections to land, history and community, showcasing the enduring spirit of Baltic Midsummer.

Summer is the best season for outdoor activities, thanks to warm weather and long days. This is the time when camping, swimming in lakes, or enjoying the Baltic Sea are highly popular. In the Baltics, locals appreciate nature, often taking walks by the seaside, enjoying the pleasant evenings under starry skies, and catching the beautiful early morning sunrise.

We invite you to discover Latvia and Estonia through our selection of popular multi-day package tours.

Riga - Strenči - Valmiera - Cēsis - Līgatse

Rīga - Rīga
Duration: 5 days
Type: self-guided
Total distance: 90 km cycling, ~20 km hiking, ~17 km boating

Soft-adventure tour in Gauja National Park, Latvia

Gauja National Park is the largest and one of the most visited national parks in Latvia. It's known for its wildlife, scenic river views, and historical sites. The park is a great place for people who enjoy nature and outdoor activities. This tour will take you through some of the best nature spots in the park, including the River Gauja, Līgatse Nature Trails, and the Sietpils sandstone cliffs. You'll get to see a variety of landscapes and wildlife.

Besides nature, the tour also offers visits to nearby towns like Cēsis and Līgatse. While the main focus is on nature, these places provide a look into local history and culture. The activities include cycling, hiking, and canoeing, which are great for exploring the area.

Information: Baltic Nature Travel
info@balticnaturetravel.com
+371 2 6302261
<https://balticnaturetourism.com/en/tour/package-soft-adventure-tour-gauja-national-park>

BALTIC NATURE TOURISM
Latvia - Estonia
Newsletter Nr. 6
SUMMER
activities

What's new this summer on balticnaturetourism.com?

Baltic people often say:

"What kind of summer is it if we don't rent a kayak, paddle down the river for several days, sleep in tents, and enjoy morning winds on the open surroundings?"



Dear

Explore over 150 nature tourism destinations across Latvia and Estonia with our detailed Baltic Nature Tourism Map. Perfect for itinerary planning, this map highlights the best spots for experiencing the natural beauty of the Baltic States.




Nature Escape

Getaway, off-grid, and reconnection with nature. A combination of nature experience and comfort. Experience the Baltics like a local. What more could we wish for in the summer? A few days off to get lost in nature and escape the busy city life? A relaxing week or two in the countryside? Exploring small villages, visiting castles and manors, and truly unwinding in nature.



Home-like accommodation and nature experience at Piedāgi Ūši

Nestled in a coastal pine forest, Piedāgi Ūši is a charming two-story holiday house that blends perfectly with its natural surroundings. The dark grey exterior harmonises with the forest, creating a peaceful retreat. The Sea Room boasts stunning views of the Baltic Sea, while the Forest Room offers a tranquil vista of the nearby pine grove.

February 2024

Delivery statistics		
This email was sent to 205 contacts. Check how they interact with it. How to read this data		
200 Delivered Delivery rate: 98%	114 Opened Open rate: 57%	16 Clicked Click rate: 8%
BOUNCED: 5 ⓘ SPAM COMPLAINTS: 0 ⓘ		

April 2024

Delivery statistics		
This email was sent to 174 contacts. Check how they interact with it. How to read this data		
167 Delivered Delivery rate: 96%	109 Opened Open rate: 65%	42 Clicked Click rate: 25%
BOUNCED: 7 ⓘ SPAM COMPLAINTS: 0 ⓘ		

June 2024

Delivery statistics		
This email was sent to 164 contacts. Check how they interact with it. How to read this data		
158 Delivered Delivery rate: 96%	106 Opened Open rate: 67%	14 Clicked Click rate: 9%
BOUNCED: 6 ⓘ SPAM COMPLAINTS: 0 ⓘ		



Captains Cruise - August 28th - Helsinki

Nature tourism



Andy Fairburn
Nordic Tourism
Collective



Rolands Ratfelders
i-Dā Adventures



Patricia Potrykus
Naturpolis Oy



Vera Lett
Tour Partner Group



Miguel Messia de Prado
PUHI | X Shore



Planned 2024

Events:

Manchester Activity & Adventure Showcase

Sept 16th Manchester with Estonian Nature Tourism Association

Adventure Europe - Sept 24th -

Online workshop to meet European adventure buyers - Baltic Country Holidays

World Travel Market 2024 - 05-07 Nov incl -

Drinks with operators on the stand

"Arival Activate" - Edinburgh - 23-25 Nov

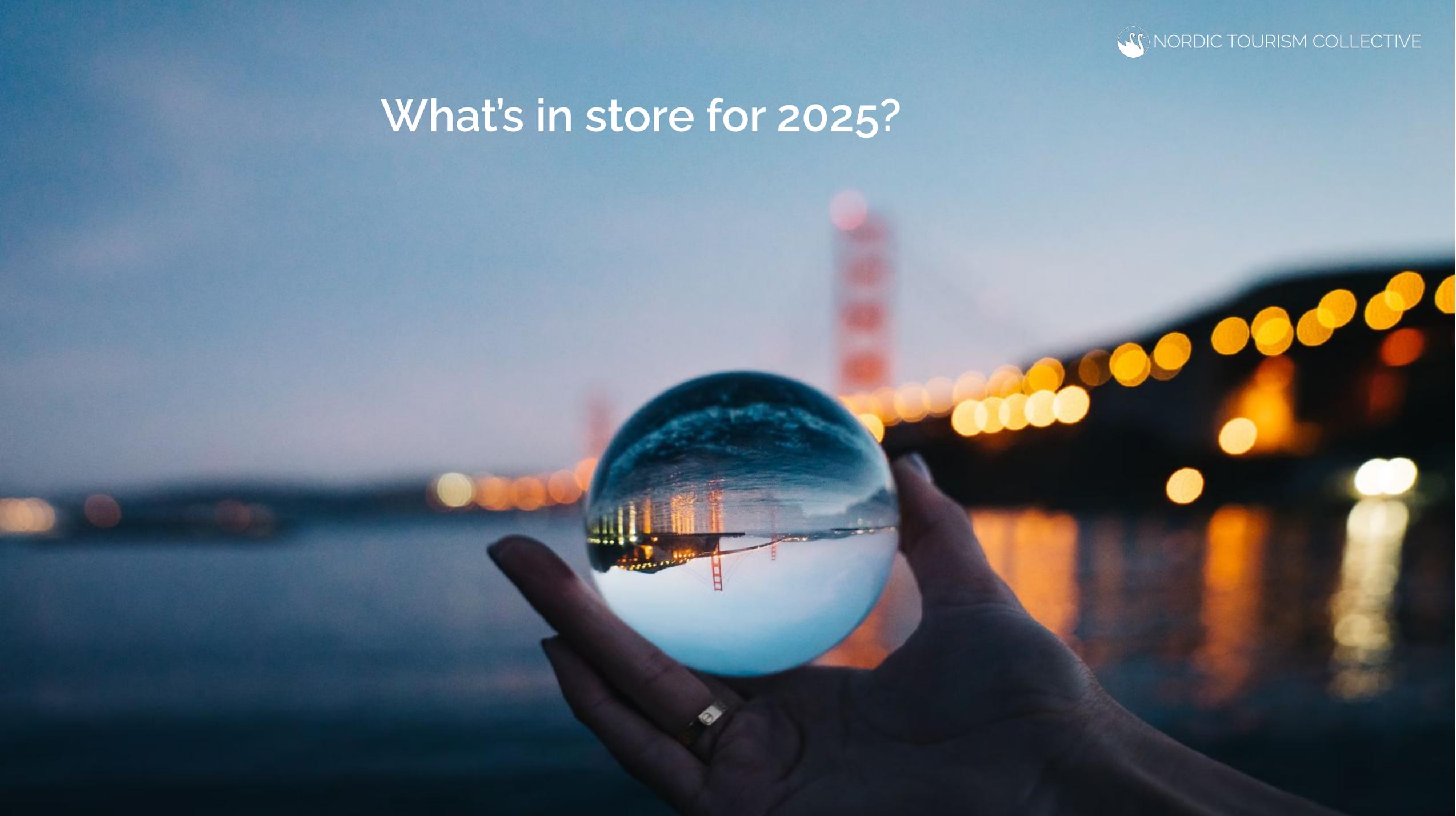
Other activities:

Continuation of Newsletters - Positive open rate

Equator Learning BNT Nature Course as part of Latvia Travel Portal

Operator Lunch and Learn?

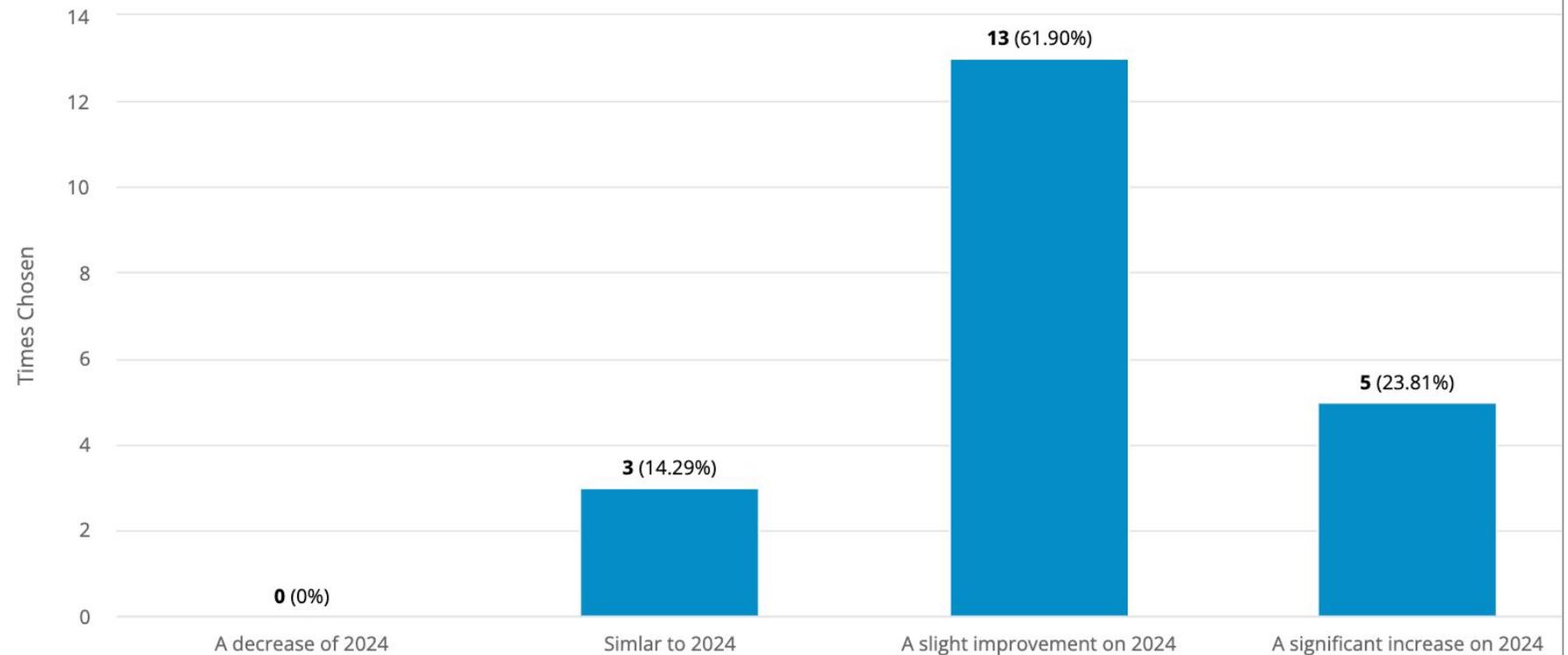
What's in store for 2025?



UK Operator Survey for 2025- Still Positive!

How do you anticipate demand for the whole Nordic & Baltic region for 2025?

Number of responses: 21



2025 Initial Plans

- Newsletters
- Spring Reception
- Winter Fam Trip
- Captains Cruise
- Operator visit

Events plan - to be discussed and agreed

Thank you

