



LIGHT IN THE DARK

The nature tourists: who
are they and how to
reach them?

METHODOLOGY

The project LIGHT IN THE DARK focuses on strategies for SMEs to enhance off-season nature-based tourism. By understanding tourist profiles and preferences, businesses can adapt to seasonal changes and boost off-peak revenue. The goal is to leverage unique tourist behaviors and market trends to create compelling offerings.

A representative survey was conducted in the surrounding regions of the Baltic Sea:

- Estonia
 - Finland
 - France
 - Germany
 - Latvia
 - Lithuania
 - Poland
 - Sweden
 - UK
- A total of 4,981 respondents took part in the survey.
 - The samples were evenly spread, ranging from 550 (PL) to 559 (LV) per country.
 - The sample, ensures a margin of error of less than 5 %.

Nature travelers all over

MOST POPULAR ACTIVITIES



Hiking / Nature walks
(80.6%)



Nature photography
(77.3%)



Sauna bathing (76.8%)

COMPANIONSHIP



Most of them travel
with a spouse or
partner 37.7%

SHORT TRIPS



Travelers prefer short trips,
with 33.5% opting for 1-3
days and 24.7% choosing
4-6 days.

SPENDING HABITS



42.78% of all
participants tend to
spend less than 100
euros a day

SELF-GUIDED TRAVEL



The majority of recreational
(67.9%), cultural (60.2%), and
active (59.7%) travelers prefer
self-guided trips, indicating a
general trend towards self-
planning.

OFF-SEASON

61.8% TRAVELERS
PREFER TO
TRAVEL OUTSIDE
OF THE HOLIDAY
SEASON

WORKATION



Combining traveling
with work is popular -
41.1%



TARGET GROUPS

With a focus on nature tourists and various parameters ranging from duration of stay to motivation, we were able to distinguish three target groups.

KEY DISTINCTIONS

LEISURE SEEKERS

SEEK:

REST AND RELAXATION
ESCAPE FROM MUNDANE
ENJOYMENT OF NATURAL
SCENERIES
LOW-INTENSITY RECREATIONAL
ACTIVITIES



CULTURAL TRAVELERS

SEEK:

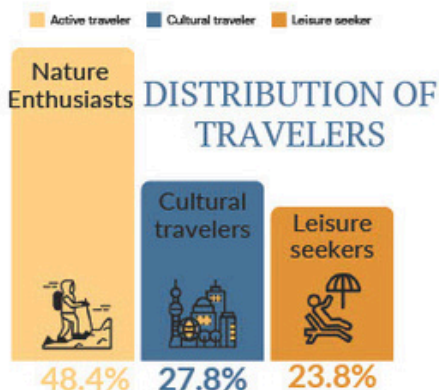
EXPLORING LOCAL NATURE
EXPERIENCING LOCAL CULTURE
APPRECIATING LOCAL CUISINE
VALUE FOR MONEY



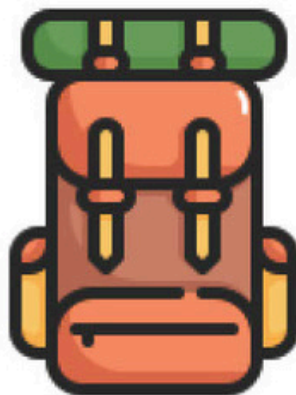
NATURE ENTHUSIASTS

SEEK:

KNOWLEDGE OF NATURE AND
SUSTAINABILITY
ADVENTURE NATURE-BASED ACTIVITIES
RELAXATION
LOCAL TRADITIONS AND SOCIAL LIFE



Active travelers are the largest group, followed by cultural and recreational ones, showing a preference for engaging and enriching experiences.





NATURE ENTHUSIASTS

WHO ARE THEY AND WHAT
DO WE KNOW ABOUT THEM

EXPERIENCE

Value travel as an opportunity to enjoy and explore nature-based activities, seek adventure, relax, and discover local culture and traditions

VALUES

Balance relaxation with adventure

ACTIVITIES

Engage in a wide range of activities, including hiking (85.2%), outdoor fitness (66.0%), bicycle riding (65.0%), sauna bathing (59.9%), diving (46.6%), fishing (37.4%), canoeing (36.8%)

COMPANIONS

More likely to travel with friends (21.7%)

AGE

Younger demographic
(18-24: 16.9%, 25-44: 37.2%)

INCOME

Higher income, with 18.0% above the national average

SPENDING

More likely to spend €101-200 daily (32.7%)

REMOTE WORK

49.6% of active travelers are interested in remote work

PEAK SEASON

Active travelers make up 49% of holiday season travelers, more than any other group



CUTURAL TRAVELERS

WHO ARE THEY AND WHAT DO WE KNOW ABOUT THEM

EXPERIENCE

Emphasize local lifestyle and cultural engagement

VALUES

Highest value on social and cultural engagement

ACTIVITIES

Enjoy activities like berry picking (53.5%), stargazing (47.1%), sauna bathing (60.0%), camping (43.4%) and quiet time in scenic natural locations with opportunities for stunning nature photography (49.6%)

OFF-SEASON TRAVELS

High preference to travel outside holiday season - 67.9%

NATURE-SECONDARY

Nature aspect is less important for their decisions - 45%

AGE

Older demographic (45-64: 34.9%)

Higher percentage of retired (28.1%)

GENDER

Higher female representation (54.6%)

ACCESSIBILITY

Consider accessibility more important (59.4%)

TRAVEL WITHOUT CHILDREN

More cultural travelers, 38.1%, travel without children



LEISURE SEEKERS

WHO ARE THEY AND WHAT
DO WE KNOW ABOUT THEM

EXPERIENCE

Prioritize destinations that provide relaxation and low-intensity recreational activities

VALUES

Highest emphasis on relaxation

ACTIVITIES

Highest emphasis on relaxation
Prefer hiking (85.2%), nature photography (63.2%), sauna bathing (59.9%) and outdoor fitness (58.6%)

TIMING OF TRAVEL

Prefer off-season travel (61.0%)

AGE

Predominantly middle-aged (25-44: 40.5%)

SPENDING

Tend to spend less than €100 daily (48.4%)

TIME ALONE

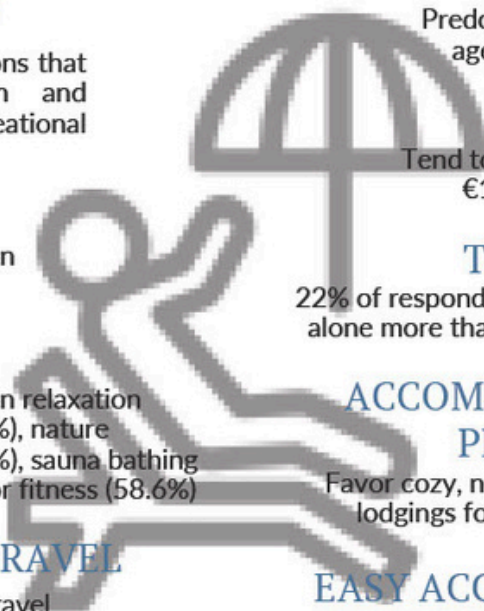
22% of respondents like to travel alone more than in other groups

ACCOMMODATION PREFERENCE

Favor cozy, nature-surrounded lodgings for a serene escape

EASY ACCESSIBILITY

59% prefer places to be more easily accessible





General Insights Across Traveler Groups

AGE DEMOGRAPHICS

Nature Enthusiasts: Tend to be younger, with 16.9% aged 18-24.

Cultural Travelers: Tend to be older, with 34.9% aged 45-64.

Recreational Travelers:
Predominantly middle-aged, with 40.5% aged 25-44.

INCOME LEVELS

Nature Enthusiasts:
Higher income, with 18.0% above the national average.

Cultural and Recreational Travelers:
Similar income distribution, with a majority around the national average.

SPENDING HABITS

Nature Enthusiasts: More likely to spend €101-200 daily (32.7%).

Cultural and Recreational Travelers tend to spend less than €100 daily.

TRAVEL COMPANIONS

All Groups: Most commonly travel with a spouse or partner.

Nature Enthusiasts: More likely to travel with friends (21.7%).

TRAVEL TIMING

All Groups: Prefer off-season travel, with cultural travelers leading at 67.9%.

Nature Enthusiasts: More likely to travel during the season (51.1%).

ACTIVITY ENGAGEMENT

Nature Enthusiasts: Highest engagement in outdoor activities.

Cultural Travelers: Less frequent engagement in nature activities.

TRIP LENGTH PREFERENCES

All Groups: Favor short trips, with 1-3 days being the most popular.

Nature Enthusiasts: Slightly more inclined towards 4-6 day trips (26.0%).

SUMMARY OF THE TRAVELLER INSIGHTS



Leisure seekers: Predominantly middle-aged, seeking relaxation and a feel-good experience in nature. They prefer shorter trips and are more likely to engage in activities like hiking and nature walks.



Cultural Travelers: Generally older, with a strong interest in engaging with local lifestyles and cultural experiences. They value social and cultural engagement highly and prefer urban settings, reflecting a higher demand for accessibility.



Nature Enthusiasts: Tend to be younger and are more inclined towards adventurous activities in nature. They are more likely to travel during the holiday season, spend more daily, and show a higher willingness to pay for their experiences.