N-B-WELL: NATURE-BASED WELLNESS TOURISM SURVEY

Survey report
2025 August

Content

Survey Objectives and Methodology

Information about Survey

Objectives

- ✓ **To analyze travel behavior and patterns –** including the average number of trips, length of trips, and purposes of travel (domestic, European, and South Baltic Sea region trips).
- ✓ **To understand the role and importance of nature-based wellness activities –** such as how often people travel for wellness, what wellness activities they engage in, how COVID-19 has influenced interest in nature-based wellness tourism, etc.
- ✓ **To identify preferences, motivators and decision factors for nature-based wellness tourism –** including activity types, seasonal influences, attitudes toward sustainability, willingness to pay, and factors influencing destination and service choices.

Fieldwork

Spring, 2025

Survey Method

The study was conducted through an **online survey** using the Intra Research internet panel. Participants were recruited digitally, allowing for a broad and diverse sample of respondents across key demographics – gender, age and region.

Target Group

Adults in the South Baltic Sea region (Lithuania, Poland, Germany, Denmark and Sweden), who are interested in or engaged in nature-based wellness tourism.

Terms Used

Nature Based Wellness – N-B-Well

Methodology

Sample Size and Statistically Significant Differences

The **sample size** n = 2 789 (with more than 500 respondents in each country) **is representative** and allows for statistically significant conclusions.

The indicator is statistically significant: xx% - higher or xx% - lower than in the total sample (95% probability).

Method: Exception tests. Each cell is tested vs. its complement (all other countries combined). Test: two-sided z-test of proportions (or t-test of means for numeric stats). Significance is assessed at the chosen level ($p < 0.05$); minimum n rules apply. No multiple-comparison correction is applied; colors only indicate “different from total,” not which country differs.

Analysis Methods Used

Cluster analysis (K-means) was applied to segment respondents into distinct groups based on their attitudes, behaviors and preferences related to nature-based wellness tourism. This method allowed the identification of homogeneous clusters with shared characteristics.
For this analysis, two blocks of questions were used: Please express your opinion on sustainable nature-based wellness tourism (scale 1 to 5, 1 = strongly disagree, 5= strongly agree) AND What motivates you to participate in nature-based wellness tourism activities? (scale 1 to 5, 1 = Never, 5= Always).

Regression analysis was applied to explore the relationships between demographic characteristics, motivational factors, and travel behaviors, in order to identify the key determinants influencing participation in wellness-related travel activities. A **stepwise multiple linear regression** approach was employed, allowing for the systematic selection of significant predictors. The dependent variables were 4 conjunct travel routes, while the independent (predictor) variables included all scale-based questions and composite indexes.
The routes were grouped into four thematic indexes: Nature-Based Activity Routes, Wellness-Oriented Retreats, Culinary and Food Experiences, and Cultural and Holistic Wellness Routes. Each index combined several related route types rated on a 4-point preference scale, and respondents were classified into **high, moderate, or low preference groups** according to their total scores.

NATURE-BASED WELLNESS TOURISM
Interreg South Baltic
Co-funded by the European Union
RMIT
Klaipėdos universitetas

Respondents Socio-Demographic Characteristics

Socio-Demographic Characteristics of Respondents

All respondents, n=2789

GENDER

Female **51%**

Male **49%**

AGE

18-24	12%
25-44	35%
45-64	35%
65-84	18%
85+	0.1%

EDUCATION

Primary School	8%
Vocational School	16%
High/Secondary School	30%
Bachelor's Degree	25%
Master's Degree	18%
Doctorate or equivalent	2%
Other	0.4%

FAMILY STATUS

In a relationship with children living at home	29%
In a relationship without children	34%
Single with children living at home	9%
Single without children	28%
Other	1%

With children 37%

COUNTRY

N=551

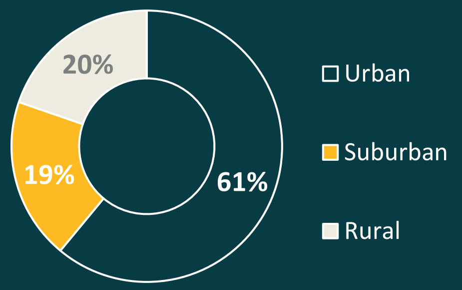
N=558

N=559

N=561

N=560

LIVING AREA



FAMILY MONTHLY INCOME

Less than national average	28%
National average	56%
Higher than national average	16%

MAIN OCCUPATION

Employed Full-Time	51%
Employed Part-Time	11%
Self-Employed / Freelance	6%
Unemployed	7%
Homemaker	3%
Student	4%
Retired	19%
Other	1%

Employed 67%

Socio-Demographic Characteristics of Respondents

Denmark, n=551

GENDER

Female	50%
Male	50%

AGE

18-24	13%
25-44	35%
45-64	34%
65+	18%

EDUCATION

Primary/Vocational School	31%
High/Secondary School	21%
Higher education	48%
Other	1%

FAMILY STATUS

In a relationship with children living at home	27%
In a relationship without children	36%
Single with children living at home	11%
Single without children	26%
Other	1%

With children 37%

COUNTRY AND LIVING AREA

Urban	61%
Suburban	22%
Rural	17%

FAMILY MONTHLY INCOME

Less than national average	27%
National average	51%
Higher than national average	21%

MAIN OCCUPATION

Employed Full-Time	49%
Employed Part-Time	12%
Self-Employed / Freelance	5%
Student/Not working	33%
Other	1%

Employed 66%

Statistically significantly higher: xx lower: xx than in the total sample

Socio-Demographic Characteristics of Respondents

Poland, n=558

GENDER

Female	Male
51%	**49%**

AGE

18-24	13%
25-44	35%
45-64	36%
65+	17%

EDUCATION

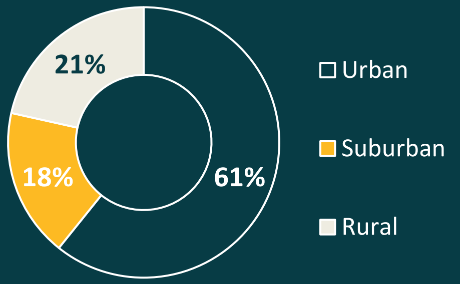
Primary/Vocational School	13%
High/Secondary School	46%
Higher education	41%
Other	0.2%

FAMILY STATUS

In a relationship with children living at home	35%
In a relationship without children	34%
Single with children living at home	10%
Single without children	20%
Other	1%

With children
44%

COUNTRY AND LIVING AREA



FAMILY MONTHLY INCOME

Less than national average	24%
National average	56%
Higher than national average	20%

MAIN OCCUPATION

Employed Full-Time	52%
Employed Part-Time	8%
Self-Employed / Freelance	7%
Student/Not working	34%
Other	0.2%

Employed 66%

Statistically significantly higher: xx lower: xx than in the total sample

Socio-Demographic Characteristics of Respondents

Germany, n=559

GENDER

Female	**51%**
Male	**49%**

AGE

18-24	11%
25-44	35%
45-64	35%
65+	19%

EDUCATION

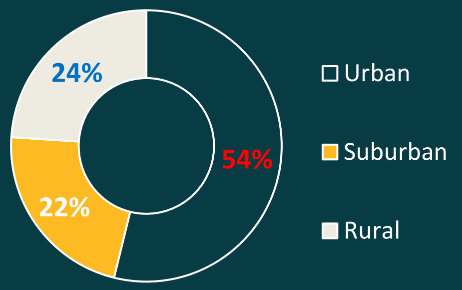
Primary/Vocational School	52%
High/Secondary School	15%
Higher education	33%
Other	1%

FAMILY STATUS

In a relationship with children living at home	23%
In a relationship without children	36%
Single with children living at home	8%
Single without children	33%
Other	0.4%

With children
31%

COUNTRY AND LIVING AREA



FAMILY MONTHLY INCOME

Less than national average	31%
National average	58%
Higher than national average	11%

MAIN OCCUPATION

Employed Full-Time	47%
Employed Part-Time	15%
Self-Employed / Freelance	5%
Student/Not working	33%
Other	0.4%

Employed 66%

Statistically significantly higher: xx lower: xx than in the total sample

Socio-Demographic Characteristics of Respondents

Sweden, n=561

GENDER

Female	**52%**
Male	**48%**

AGE

18-24	11%
25-44	33%
45-64	34%
65+	21%

EDUCATION

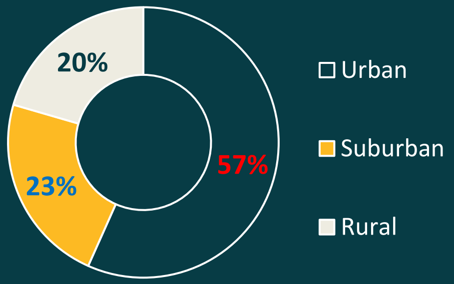
Primary/Vocational School	12%
High/Secondary School	46%
Higher education	42%
Other	0.2%

FAMILY STATUS

In a relationship with children living at home	27%
In a relationship without children	26%
Single with children living at home	9%
Single without children	38%
Other	0.4%

With children 36%

COUNTRY AND LIVING AREA



FAMILY MONTHLY INCOME

Less than national average	27%
National average	61%
Higher than national average	12%

MAIN OCCUPATION

Employed Full-Time	48%
Employed Part-Time	11%
Self-Employed / Freelance	5%
Student/Not working	35%
Other	1%

Employed 64%

Statistically significantly higher: xx lower: xx than in the total sample

Socio-Demographic Characteristics of Respondents

Lithuania, n=560

GENDER

Female	**52%**
Male	**48%**

AGE

18-24	13%
25-44	36%
45-64	36%
65+	15%

EDUCATION

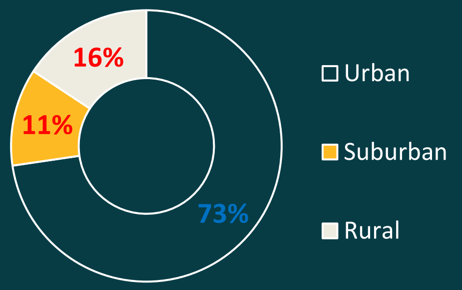
Primary/Vocational School	13%
High/Secondary School	22%
Higher education	64%
Other	1%

FAMILY STATUS

In a relationship with children living at home	32%
In a relationship without children	37%
Single with children living at home	7%
Single without children	24%
Other	1%

With children
39%

COUNTRY AND LIVING AREA



FAMILY MONTHLY INCOME

Less than national average	30%
National average	53%
Higher than national average	16%

MAIN OCCUPATION

Employed Full-Time	58%
Employed Part-Time	8%
Self-Employed / Freelance	8%
Student/Not working	26%
Other	0.4%

Employed
74%

Statistically significantly higher: xx lower: xx than in the total sample

Main Conclusions and Insights

Survey Summary

The average number of trips per year in different areas

- Survey results show that people take **about 4 domestic trips per year.** Lithuania stands out with the highest number, averaging 7 trips per year. In contrast, Germany has the lowest rate, with residents taking 2 domestic trips per year. Poland follows with 4.1 trips, while Sweden averages 3.4 trips and Denmark 3.0 trips.

- On average, people take about **2 trips per year to other European countries.** Denmark has the highest rate (2.4 trips per year), while Germany has the lowest (1.5 trips per year). Lithuania follows with 2.1 trips, Sweden with 1.9 trips, and Poland with 1.7 trips.

- Within the **South Baltic Sea region, the mean is 1.7 trips per year**. Lithuania leads with 2.4 trips, followed by Denmark with 2.1. Poland and Sweden both average 1.4 trips, while Germany has the lowest rate at 1.2 trips per year.

The length of a typical trip

- Across all countries, the most common trip lengths are 1–3 days (30%) and 4–6 days (27%), while 1 out of 5 travels for a week. Lithuania stands out, with nearly half of respondents (47%) typically travelling for 1–3 days. In Denmark and Poland, shorter trips of 1–3 days and 4–6 days are similarly popular. In Sweden, similar shares of respondents take trips lasting 1–3 days (28%), 4–6 days (25%), and one week (26%). Longer trips of more than one week are most frequent in Germany (19%).

Survey Summary

Primary purpose of travel

- The main purpose of travel is **leisure and recreation (38%)**, followed by **nature and outdoors (28%)**, **wellness and relaxation (28%)**, **and family visits (26%)**. In Poland, leisure and recreation (48%) and nature and outdoors (38%) are more common travel goals. Leisure and recreation is also popular in Germany (46%). Swedish travelers more often take trips for wellness and relaxation (36%) or family visits (35%). Lithuanian travelers are more likely to travel for adventure (21%), while Danes more often choose urban tourism (27%) and cultural activities (21%).

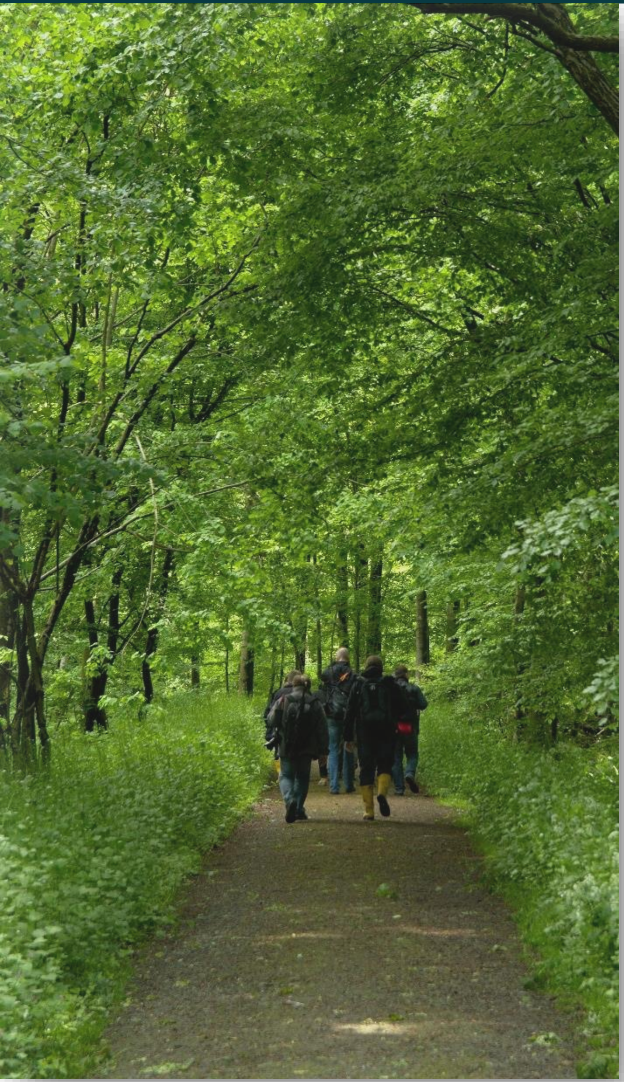
Trips for wellness purposes

- **Most people travel for wellness purposes 1–2 times per year (63% overall).** This share is highest in Lithuania (70%). About 1 out of 5 respondents (21%) do not take wellness trips at all, with the highest share in Denmark (32%) and Germany (25%).

The importance of nature aspect when choosing a wellness destination

- **Nature plays an important role when choosing a wellness destination, 64% of respondents evaluated it as very or extremely important especially** in Germany (72%), Poland (68%), and Lithuania (67%), while it was slightly less important among respondents in Denmark (57%) and Sweden (55%).

Survey Summary



The change of interest in nature-based wellness tourism due to post-COVID health concerns

- Post-COVID health concerns have influenced interest in nature-based wellness tourism differently across markets. On average, **36% of respondents are now more interested in this type of tourism due to its health benefits**, while half (50%) were already interested before the pandemic. Lithuania stands out with the largest share (65%) of respondents who were already interested, whereas respondents from Poland and Germany more often were those whose interest increased post-COVID.

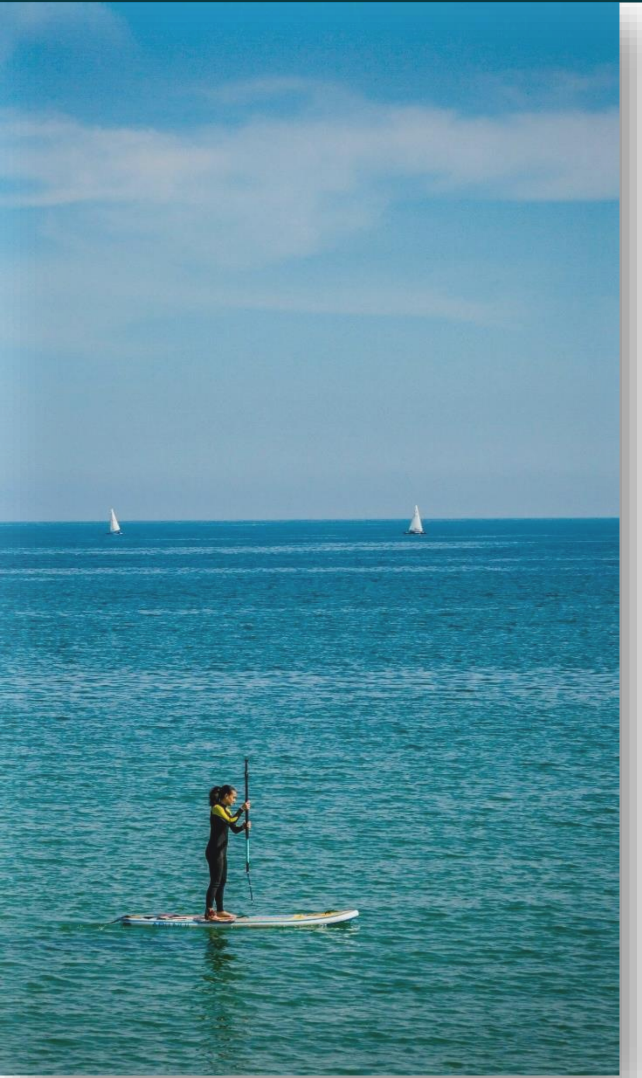
Nature-based wellness personal meaning

- Across all markets, **the top personal meaning of nature-based wellness is simply being in nature (82%)**. This is especially important in Lithuania (89%) and Poland (88%). Other highly valued aspects include getting more sleep by spending time outdoors (77%), improving work-life balance through rest and relaxation (74%), getting more physically active (73%), and participating in stress-reducing activities (72%). All aspects are more important to respondents in Poland and Lithuania, while seeking holistic health is relatively more important to Germans.

Nature-based wellness activities during the last year

- **Forest-based activities (91%) and outdoor sports and physical activities (88%) were the most common nature-based wellness activities in all countries**, with the highest participation in Poland and Lithuania. 8 out of 10 respondents participated in water-based activities (82%), particularly in Germany and Lithuania. Mindfulness and relaxation in nature were more popular in Poland (86%) and Germany (82%). Compared to other countries, Lithuanians more frequently participated in seasonal wellness activities (86%) as well as eco-spa and natural treatments (84%).

Survey Summary



Participation in nature-based wellness activities during the last year

- People across all countries participated in **forest-based activities** during the last year, more or less often. In Poland participation was more often weekly (29%), in Germany both daily (14%) and weekly (29%), while in Lithuania it was more often monthly (30%) or occasional (39%).
- **Outdoor sports and physical activities** are popular in all countries, but a larger share of respondents in Denmark (17%) and Sweden (18%) did not participate during the year. Looking at differences across countries, respondents in Poland participated more often on a daily basis (23%), in Germany mainly weekly (35%), while in Lithuania participation was more often monthly (21%) or occasional (38%).
- About 8 out of 10 respondents in total participated in **water-based activities** at least occasionally. Respondents in Germany participated more often on a weekly basis (25%), while in Lithuania participation was more often occasional (50%). A larger share of respondents in Denmark (24%) and Sweden (27%) did not participate at all.
- Participation in **wildlife and nature connection experiences** was similar to water-based activities, with about 8 out of 10 respondents taking part at least occasionally during the last year. Respondents in Poland and Germany participated more often on a weekly basis, while in Lithuania participation was more often occasional (45%). Participation was lower in Denmark (never 24%) and Sweden (never 26%).
- **Mindfulness and relaxation in nature activities** showed similar trends to other activities. Respondents in Germany engaged more often on a weekly basis (26%), in Lithuania participation was more often occasional (42%), while in Denmark (26%) and Sweden (29%) a larger share did not participate at all.

Survey Summary

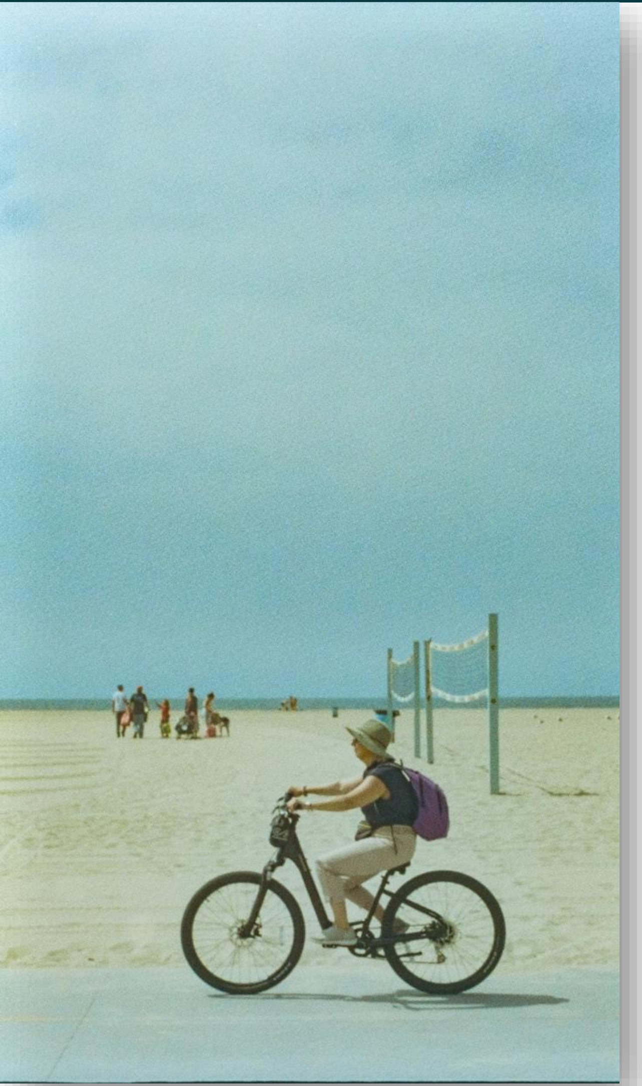
Nature-based wellness activities during the last year

- **Seasonal wellness activities** were mostly occasional (39%), especially in Lithuania (52%). In Germany, people were more likely to participate on a daily (9%) or weekly (18%) basis, while in Denmark respondents more often did not participate at all (30%).
- Participation in **eco-spa and natural treatments** was less common compared to other activities, with about 7 out of 10 respondents taking part at least occasionally. In Lithuania (54%) and Poland (41%) participation was more often occasional, while in Sweden 44% of respondents did not participate at all.
- **Wellness retreats** were the least popular nature-based wellness activity, with about a third of respondents never taking part. Those who did participate were more often occasional (31%), especially in Lithuania (40%). In Sweden (40%) a larger share of respondents did not participate at all.

Planning activities in the near future

- **Forest-based activities (57%) and outdoor sports (54%) are the most planned activities in the near future**, especially in Poland. Water-based activities are also relevant (45%), with higher interest in Germany (55%). Wildlife and mindfulness activities are more frequently planned in Poland (both 55%), while seasonal wellness activities attract greater interest in Sweden (45%). Eco-spa treatments (34%) and wellness retreats (30%) remain the least popular planned activities overall.

Survey Summary



Attitudes toward sustainable nature-based wellness tourism

- **Protecting and preserving natural environments (69%) and preferring wellness experiences close to nature (69%) are the top attitudes across all countries.** Local traditions and natural healing methods (62%), as well as feeling more relaxed and recharged after N-B-Well experiences (62%) are also highly valued, especially in Poland and Lithuania. Overall, all attitudes are stronger among residents of Poland. Attitudes such as actively seeking N-B-Well for relaxation and self-care and willingness to pay more for sustainable wellness services are more important in Germany.

Investment in nature-based wellness activities

- Willingness to pay a premium for **nature-based wellness activities** remains relatively low in all countries except Germany where more respondents are willing to pay extra (45%). Most respondents are moderately willing to pay for nature-based wellness activities (40%), with the highest share in Lithuania (53%). About 1 out of 10 respondents are not willing to pay at all.

- Willingness to pay extra for **eco-certified nature-based wellness experiences** shows varied opinions. Almost one-third of respondents would pay more (29%), while a similar share would not (35%). Another 36% are uncertain and would consider it depending on the price difference. In Germany, more respondents were clearly willing to pay extra (37%), while in Lithuania almost half (48%) were uncertain and would decide based on price. Respondents in Denmark more often indicated they would not pay extra (40%).

- Nearly a half of respondents (48%) spend less than €100 per day on nature-based wellness destinations, with the highest shares in Lithuania (53%) and in Poland and Sweden (51%). A daily budget of €101–300 is more common among respondents in Denmark (55%).

Survey Summary

Information channels and N-B-Well trip booking places

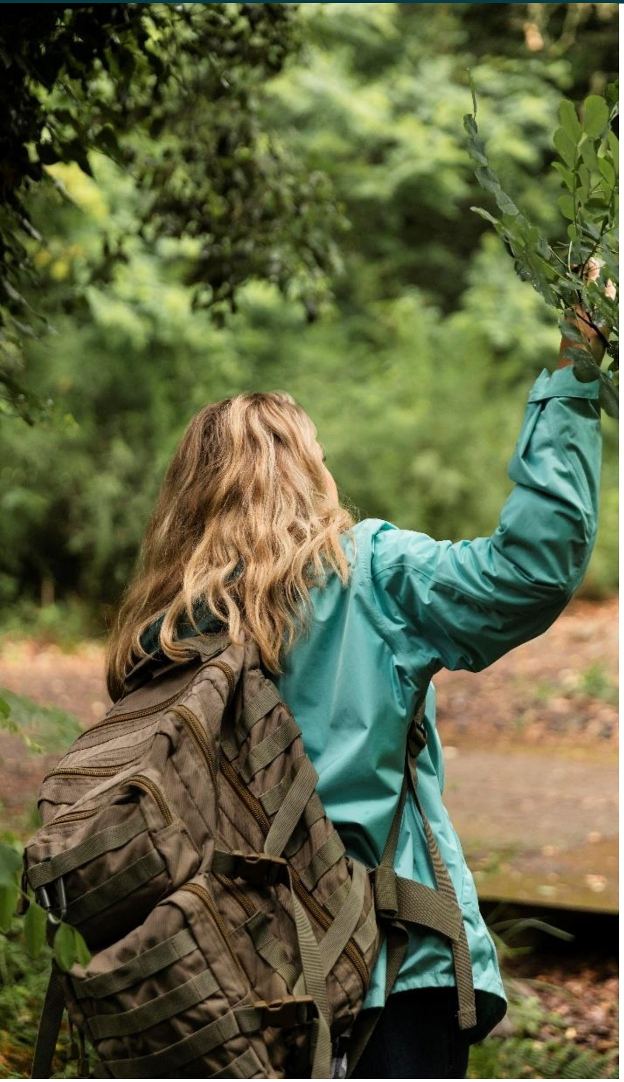
- **Recommendations from friends and family are the main information source (48%)** across all countries. Other key sources include **social media (33%), official websites (31%),** and **customer reviews (28%)**. In Lithuania, Facebook (49%) and customer reviews (36%) are used more often, while in Poland official websites (41%) and customer reviews (34%) stand out. Compared to other countries, people in Germany tend to use less popular channels such as television (25%), doctors' recommendations (22%), and print magazines (17%). In Sweden, Instagram is used more frequently than elsewhere.

- **The main booking channel for N-B-Well trips is Online Travel Agencies** (43%). Other booking places are direct booking through service providers (32%), traditional travel agencies (26%), travel apps (23%) and tour operators (22%). In Lithuania direct booking is much more common (49%), while in Poland traditional travel agencies are more popular (32%). Travel apps are used more frequently in Germany and Sweden, while package deals are slightly more popular in Denmark (26%).

N-B-Well activities motivators

- **The main motivators to participate in N-B-Well activities are to rest and relax (70%)**, to spend more time outdoors (68%), to recharge energy (67%), to enhance emotional well-being, overall health (66%) and stress reduction (66%). Escape from routine (65%) and improving physical health (64%) are also among the strongest drivers. In Poland, most motivators are above average, especially those related to health and well-being. In Denmark, all motivators are lower compared to other countries. In Lithuania, escape from routine (71%), time with family and friends (69%), disconnection from work-related pressures (65%) and connection to the natural world (64%) are more encouraging motivators.

Survey Summary



N-B-Well travel companions

- **People most often travel to N-B-Well destinations with a spouse or partner (33%)**, while about a fifth go solo (21%) or with friends (19%), and 13% with spouse/partner and children. Solo travelling is more popular in Germany (25%) and Sweden (28%). In Lithuania, people are more likely to travel with family (20%).

Important factors when selecting a nature-based wellness products or services

- **The most important factors when selecting N-B-Well products or services are being well-priced (60%) and high quality (53%).** Other key aspects include addressing specific needs (52%), attractive destination (47%) and positive reviews (46%). In Poland most of the factors are rated higher than average. In Lithuania, price (68%), meeting personal needs (59%) and attractive destination (53%) are more important. In Germany people pay more attention to the factors related to sustainability and accessibility. In Sweden, almost all criteria are rated lower than the average.

The importance of designated thematic routes when choosing a wellness destination

- **Designated thematic routes are important when choosing a N-B-Well destination**, with **55% rating them as very or extremely important**. About a third (31%) see them as moderately important, while 14% think they are slightly or not important. The importance is higher in Germany (mean 3.8), Poland (mean 3.7) and Lithuania (mean 3.6), while in Denmark thematic routes are less important (mean 3.1).

Survey Summary

N-B-Well thematic routes length and difficulty

- **Medium-length routes with a mix of relaxation with light physical activity are the most preferred option (53%)**. Short and easy routes attract 42% of respondents, while 5% would choose long and challenging routes. By country, Poland shows the strongest preference for medium-length routes (59%), while in Germany short routes tend to be slightly more popular (46%).

Important aspects when choosing a N-B-Well route

- **Scenic beauty and natural surroundings (33%), privacy and peaceful environment (27%) and accommodation quality (26%)** are the TOP 3 most important aspects when choosing a nature-based wellness route. In Lithuania, scenic beauty and natural surroundings (mean 6.9 out of 10) and the availability of wellness-focused amenities (mean 5.8 out of 10) stand out as more important. Food and dining options and cultural and local experiences are more important in Denmark and Sweden.

Season impact on choice of a N-B-Well destination

- When talking about the season's impact on the choice of a N-B-Well destination, more than half of respondents agreed with all aspects. **The top-rated factors are comfortable weather (64%), season-aligned activities (61%), cultural experiences depending on the time of year (59%), and off-peak travel to save on costs (59%)**. In Poland, almost all aspects are rated higher, showing the strongest seasonal influence on decision-making, while in Denmark and Sweden seasonal factors matter less. In Lithuania, comfortable weather (71%), the popularity of destinations (65%), and traveling in summer are more important (62%).

Survey Summary

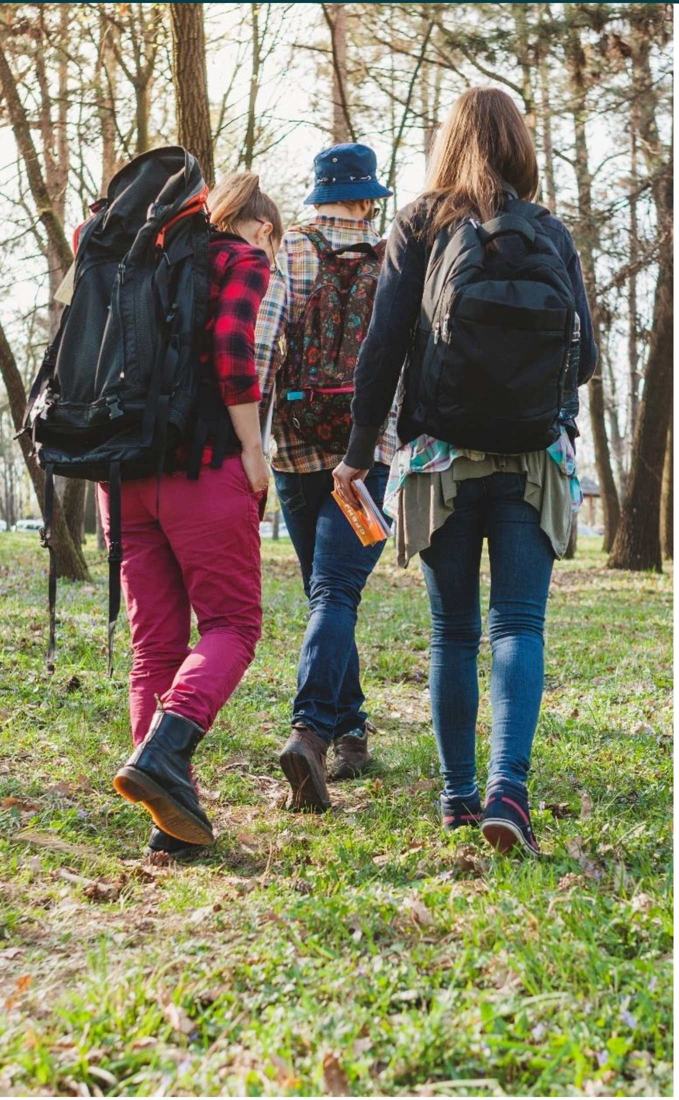
Favorite N-B-Well services

- Eco-spa and natural treatments (16%), mindfulness and relaxation in nature (12%), outdoor sports and physical activities (11%), and water or forest-based activities (9%) were the most spontaneously mentioned N-B-Well services people enjoy in their country. Poland stands out for the highest interest in eco-spa (27%), Lithuania for mindfulness and relaxation in nature (20%), Germany for water-based activities (13%), and Sweden for forest-based activities (14%).

Wanted N-B-Well services

- When asked what nature-based wellness services they miss in their country, more than half of respondents did not mention any missing services (51%), and 15% said they are satisfied with the current N-B-Well services. The most frequently mentioned needs are **natural objects for recreation** (6%) and **SPA and wellness services** (5%).

Survey Summary: Tourists Segments by Engagement in N-B-Well Travel



Tourists Segments engagement in N-B-Well

- The five segments show **clear differences in their engagement with nature-based wellness** (N-B-Well). **Nature Wellness Enthusiasts are the most committed**, valuing both personal well-being and ecological sustainability, and are willing to pay more for authentic, eco-sustainable experiences. **Eco-Experience Explorers are positively inclined and curious**, motivated by discovery, culture, and eco-friendly practices, while **Wellness-Focused Supporters are primarily interested in rest, stress reduction**, and health benefits, but less engaged with cultural or sustainability aspects. Casual Travelers show only moderate interest, taking short domestic trips and engaging with N-B-Well mostly as followers if offers are simple and bundled with mainstream travel. In contrast, the Disinterested in N-B-Well shows minimal motivation, with little relevance of N-B-Well for their travel choices.

- Overall, **this suggests a tiered approach is needed**: Nature Wellness Enthusiasts form the core, loyal premium target; Eco-Experience Explorers and Wellness-Focused Supporters are valuable secondary audiences if addressed with tailored offers (immersive discovery vs. comfort and relaxation). Casual Travelers may be drawn in with accessible, low-barrier options, while the Disinterested in N-B-Well Segment should not be a marketing focus.

Survey Summary: Nature-Based Wellness Routes

<u>**Nature-based wellness tourism routes**</u>

- **Hiking or nature walks are the most preferred activity routes (69%),** followed by nature observation routes (63%) and water-based wellness activities (63%). More than a half of respondents are interested in year-round outdoor activities routes (55%), forest therapy trails (55%) and eco-friendly cycling routes (54%). Around half also mentioned foraging therapy (50%) and yoga or meditation trails (47%), although these are relatively less popular. In Poland, most activities are preferred above average, while in Denmark, Sweden and Lithuania the interest tends to be lower. In Germany, higher than average preferences are seen for nature observation routes (68%), water-based wellness activities (72%), eco-friendly cycling routes (58%) and yoga or meditation trails (53%).

- **Wellness stays at rural areas (60%) and wellness spa resorts (60%) are the most preferred wellness retreats**, while camping and glamping retreats attract around half of respondents (50%). In Poland, all options are preferred more.

- **Organic and locally sourced meals are the most preferred culinary and food experiences (62%)**, followed by culinary wellness experiences (56%). Wellness tea houses and herbal cafés attract around half of respondents (50%). By country, Poland shows the highest interest in all options, while in Germany wellness tea houses are more popular (55%).

- **Cultural and historical nature routes are the most preferred option in cultural and holistic wellness routes category (56%)**. Routes featuring local wellness traditions attract nearly half of respondents (49%), while holistic wellness and spiritual retreats are slightly less popular (46%). Poland and Germany show the highest interest across all cultural and holistic wellness routes.

Survey Summary: Nature-Based Wellness Routes

<u>**Demographic Differences**</u>

Nature-Based Activity Routes

- Stronger in **Poland and Germany**.
- Attracts **younger and middle-aged (18–44)**, active travelers, often families.
- Appeals to both **casual wellness seekers (short hikes, easy routes)** and **enthusiasts (challenging, frequent trips)**.

Wellness-Oriented Retreats

- Appeals to **18–44, employed, higher income** travelers.
- Popular with those who want **premium spa stays** or **organic farm retreats**.
- **Camping and Glamping** attracts younger audiences, while spa resorts are more female-focused.
- Strong demand in **Poland and Germany**, weaker in Lithuania.

Culinary & Food Experiences

- Strongest among **Poland and Germany**.
- Audience: **employed, families, higher income, frequent wellness travelers**.
- Appeals to **social and experiential travelers** (friends/family cooking classes, farm-to-table dining).

Cultural & Holistic Wellness Routes

- Strongest in **Germany and Poland**, less so in Sweden/Lithuania.
- Attracts **18–44, employed, with children, higher income**.
- Appeals to **wellness enthusiasts seeking authenticity & transformation** (yoga, meditation, traditions).

Survey Summary: Nature-Based Wellness Routes

Commonalities Across Routes

- ✓ **Core traveler group:** Younger to middle-aged (18–44), employed, higher income, often traveling with family or friends.
- ✓ **Wellness Enthusiasts** are consistently the main audience — frequent travelers (3–6+ trips/year), willing to pay €101–400+.
- ✓ **Poland and Germany** stand out as the most engaged markets across all routes.
- ✓ All routes appeal to **premium spenders** rather than budget segments.
- ✓ **Authenticity, nature immersion, and premium experiences** are key across categories.

Overall Insight from Regression Analysis

Shared ground across all routes: Organic/local food, spa resorts, cultural healing, mindfulness appear as strong or supportive in all models – these are universal hooks.

Differences:

- ✓ **Nature-Based Activity Routes** = driven by outdoor immersion + authenticity.
- ✓ **Wellness-Oriented Retreats** = driven by food & water-based wellness.
- ✓ **Culinary and Food Experiences** = driven by food as wellness – healthy eating, authentic local foodways, sustainability, social bonding.
- ✓ **Cultural and Holistic Wellness Routes** = driven by mind-body & tradition as wellness – yoga, rituals, spirituality, cultural healing knowledge.

Key Insights (1)

1. **TRAVELLING HABITS ARE DIFFERENT ACROSS THE MARKETS**

Number of trips is related to the length of travel. In Lithuania, people take more trips, but they are typically 1–3 days long, while in Germany respondents travel less often but for longer periods.

2. TRAVEL PURPOSES REFLECT CULTURAL DIFFERENCES

Leisure and recreation dominates in most countries. Poles more often choose nature and outdoors, Swedes prefer wellness and family visits, Lithuanians stand out with a higher share of adventure travel, while Danes show stronger interest in urban tourism.

3. WELLNESS TRAVEL IS UNEVENLY SPREAD ACROSS MARKETS

Most people take 1–2 wellness trips per year. Lithuania leads in frequency, while Denmark and Germany have the highest share of non-travelers.

4. NATURE IS A KEY DRIVER FOR WELLNESS TOURISM

Nature is rated as very or extremely important by almost two-thirds of respondents, especially in Germany, Poland and Lithuania.

5. POST-COVID SHIFT BOOSTED WELLNESS INTEREST DIFFERENTLY ACROSS MARKETS

One third of respondents became more interested in nature-based wellness due to health concerns after COVID. The increase is strongest in Poland and Germany, while in Lithuania the majority were already interested before.

Key Insights (2)

6. FUTURE PLANS SHOW STRONG INTEREST IN OUTDOOR ACTIVITIES
In the near future, people plan mostly forest-based and outdoor sports and physical activities. Poland stands out with higher interest in wildlife and mindfulness activities, while Sweden shows more interest in seasonal wellness activities.

7. INFORMATION SOURCES AND BOOKING CHANNELS VARY
Friends and family are the main information source across all countries. Lithuanians rely more on Facebook, customer reviews, and direct booking, while Poles prefer official websites, customer reviews, and travel agencies. Germans use TV, doctors' recommendations, and travel apps more often, while in Sweden Instagram and travel apps are more common.

8. N-B-Well ACTIVITY MOTIVATORS HIGHLIGHT REST AND RECOVERY NEEDS
Top motivators across markets are to rest, recharge, and reduce stress. In Lithuania, escaping routine and spending time with family are especially important.

9. PRICE AND QUALITY ARE CRUCIAL WHEN SELECTING N-B-Well SERVICES
Well-priced and high-quality offers are the most important factors when choosing wellness services. Lithuanians are especially price-sensitive, while in Germany people focus more on sustainability aspects.

10. TRAVEL COMPANIONSHIPS HIGHLIGHT CULTURAL PREFERENCES
Most respondents travel with a partner, but solo travel is more common in Germany and Sweden. Lithuanians more often travel with family.

Key Insights (3)

11. PREMIUM WELLNESS TRAVELERS ARE THE CORE AUDIENCE
Across all routes, the main segment is younger to middle-aged (18–44), employed, and higher income. They are frequent travelers (3–6+ trips per year) and willing to spend €101–400+, showing strong interest in premium wellness experiences over budget options.

12. POLAND AND GERMANY ARE THE STRONGEST MARKETS
Respondents in Poland and Germany show consistently higher interest across all wellness routes, from outdoor activities to spa resorts and culinary experiences. These two markets stand out compared to Sweden and Lithuania, where interest is weaker.

13. UNIVERSAL HOOKS DRIVE ALL ROUTES
Organic/local food, spa resorts, mindfulness, and cultural healing consistently attract respondents across categories. While each route has unique drivers (e.g., outdoor immersion, spirituality, or culinary bonding), these shared elements form the strongest common ground.

14. NATURE WELLNESS ENTHUSIASTS ARE THE LOYAL CORE TRAVELERS SEGMENT
Mostly women (60%), aged 25–64, higher income, often employed full-time with families. They are highly engaged, value both personal well-being and sustainability, and are willing to pay more for authentic, eco-friendly services. They should be targeted as the core premium audience with eco-sustainable, meaningful wellness packages.

15. ECO-EXPERIENCE EXPLORERS SEEK DISCOVERY AND VARIETY
Travelers with higher education and income, have children, often traveling with friends. They are motivated by cultural enrichment, eco-lodges, and authentic experiences. This group should be targeted as a secondary growth audience with immersive, discovery-driven offers combining wellness, culture, and eco-values.

16. CASUAL AND WELLNESS-FOCUSED TRAVELERS NEED ACCESSIBLE OFFERS
Casual Travelers skew slightly male (55%), middle-aged, employed full-time or students, focusing on short domestic trips. Wellness-Focused Supporters skew female (54%), older (65+ 27%), often lower income, traveling with partners. Both segments value relaxation and comfort over eco or cultural elements. They should be targeted as broad, volume audiences with simple, comfort-oriented, and easy-entry wellness options (bundled with mainstream travel).

NATURE-BASED WELLNESS TOURISM

Interreg South Baltic

Co-funded by the European Union

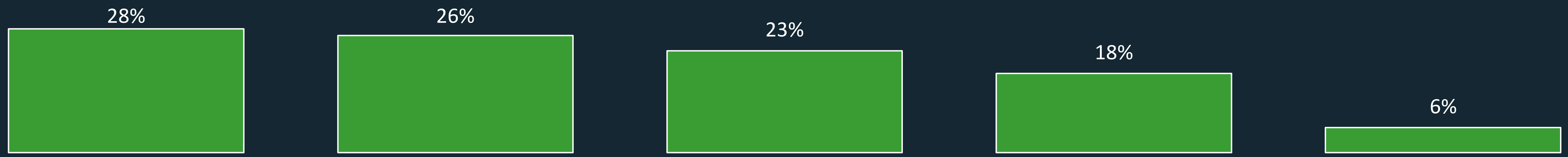
Klaipėdos universitetas

Research Results

Tourists Segments by Engagement in N-B-Well Travel

N-B-WELL TOURISTS SEGMENTS

All respondents, n=2789



Casual travelers

Moderately engaged with nature-based tourism, showing average interest in relaxation and outdoor activities but little enthusiasm for mindfulness, indigenous practices, or sustainability.

Eco-Experience Explorers

Positively inclined toward nature-based wellness, valuing eco-friendly practices, cultural enrichment, and relaxation, with willingness to pay more for sustainable options.

Nature Wellness Enthusiasts

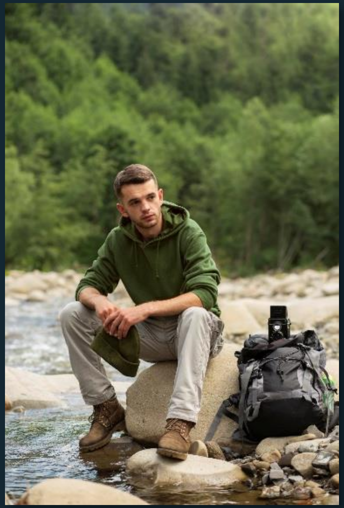
The most engaged, deeply connecting wellness with nature, prioritizing health, sustainability, and showing strong willingness to pay for eco-friendly services.

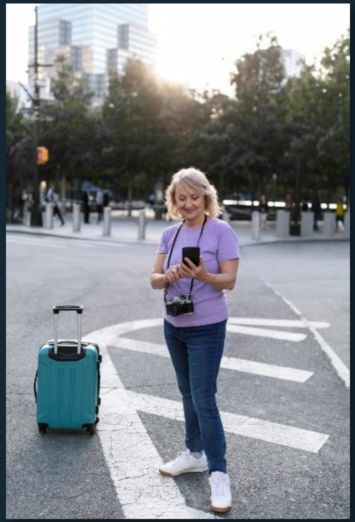
Wellness-Focused Supporters

Wellness-focused and positively inclined toward nature experiences, valuing relaxation, stress reduction, and time outdoors, but with less intensity in sustainability and cultural exploration than the most committed clusters.

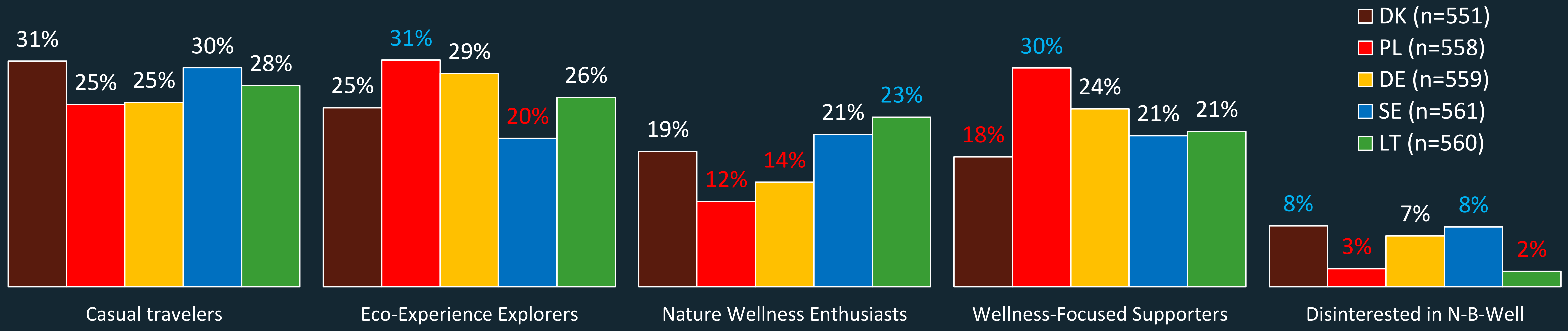
Disinterested in N-B-Well

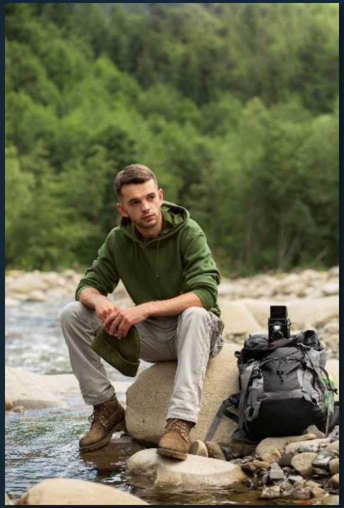
Disengaged from nature-based wellness tourism, showing little interest in wellness benefits, outdoor activities, sustainability, or cultural practices. Interested more in urban tourism.



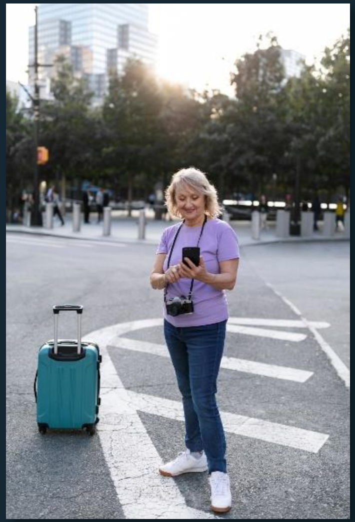


N-B-WELL TOURISTS SEGMENTS BY COUNTRY









TOURISTS SEGMENT

Casual Travelers, N=772

Female 45%
Male 55%

18-24 15%
25-44 37%
45-64 30%
65+ 18%

Employed Full-Time 47%
Employed Part-Time 9%
Self-Employed / Freelance 7%
Student/Not working 37%
Other 1%

More often domestic short trip travelers

Local trips – 84%, average number of trips – 3,4

Europe trips – 71%, average number of trips – 1,8

South Baltics trips – 60%, average number of trips – 1,6

Less and shorter trips for wellness purposes

At least one - 72%, 1-2 trips 61%

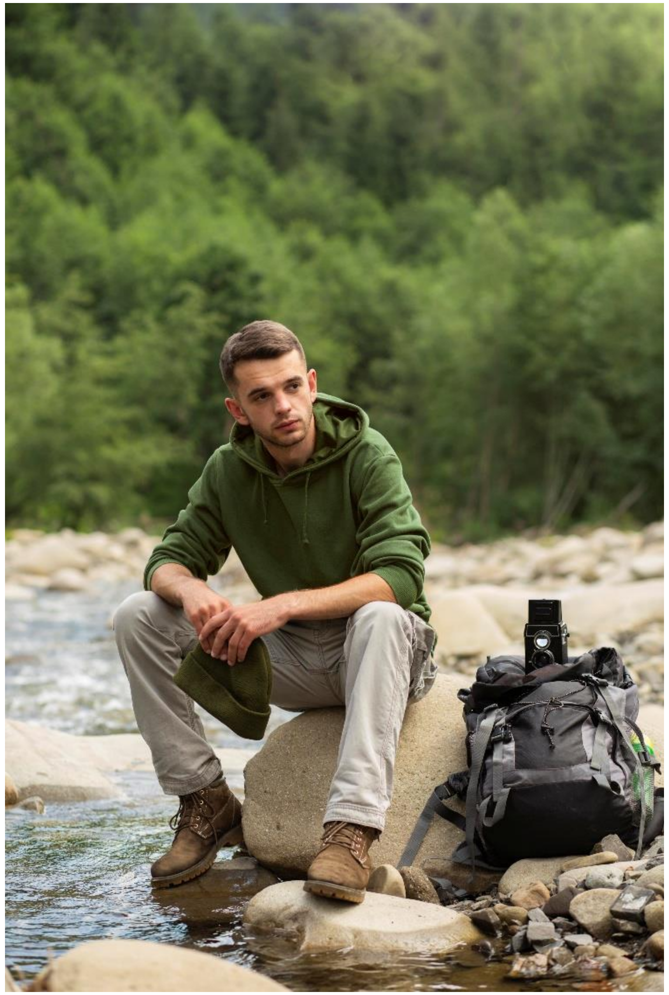
Nature aspect importance
Moderately 44%, Slightly 9%

General profile: This group shows **moderate agreement** with most statements. They are not strongly motivated by N-B-Well tourism but are not opposed either.

- ✓ Average interest in rest, relaxation, and stress reduction.
- ✓ Moderate agreement with nature-based activities like exploring landscapes, reconnecting with nature, or spending time outdoors.
- ✓ Neutral on sustainability and conservation.
- ✓ Lowest enthusiasm for mindfulness/meditation in nature and indigenous wellness practices.

Casual travelers see some benefits in N-B-Well — mostly **basic wellness outcomes like relaxation, health, and routine escape** — but they lack strong engagement. They are more "followers" than leaders in adopting N-B-Well activities.

Marketing implication: This group is best reached through **accessible, easy-to-join wellness offers**. They are unlikely to seek N-B-Well out themselves but could participate if bundled with mainstream travel or presented as simple ways to relax.



Info channels

Statistically significantly higher: xx% lower: xx% than in the total sample

TOURISTS SEGMENT

Eco-Experience Explorers, N=730

Female	48%
Male	52%

Age	
18-24	14%
25-44	36%
45-64	34%
65+	16%

Country	
Poland	31%
Sweden	20%

Employment	
Employed Full-Time	57%
Employed Part-Time	12%
Self-Employed / Freelance	6%
Student/Not working	25%

Higher education (50%)
High income (national average 60%, higher than average 19%)
Have children (42%)
Travel to N-B-Well more often **with friends** (24%)

More often longer trips to Europe

Europe trips – 80%, average number of trips – 2,3.
South Baltics trips – 69%, average number of trips - 1,8.

More and longer or medium trips for wellness purposes

At least one - 86%, 1-2 trips 68%, 3-5 trips 16%.
Medium-length routes with a mix of relaxation and light physical activity 60%

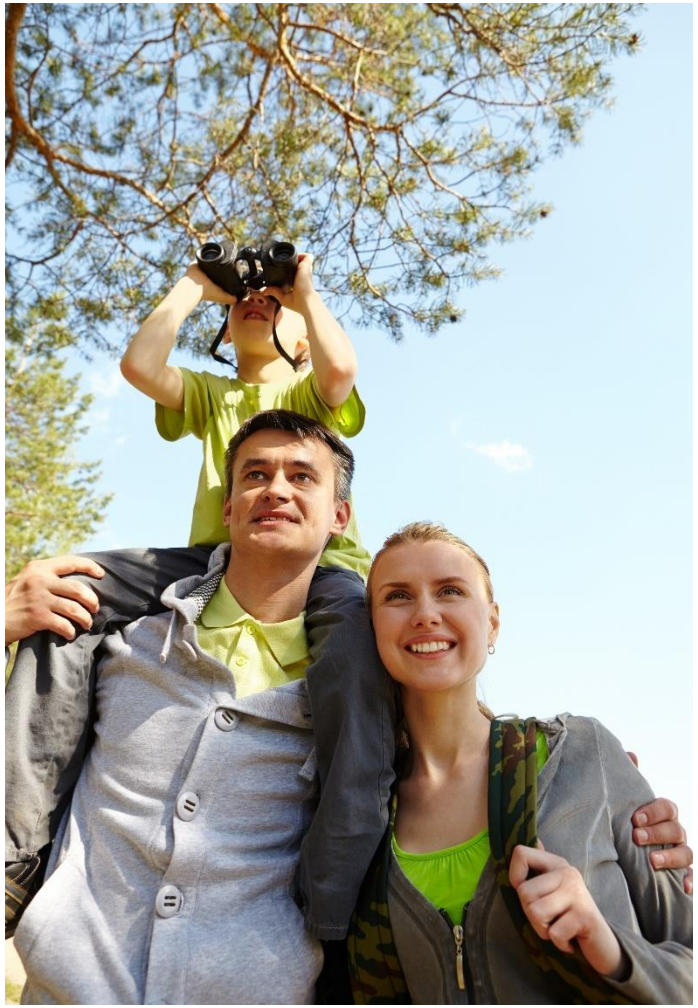
Nature aspect importance
Very important 57%

General profile: This segment shows above-average agreement with most N-B-Well statements. They are **positively inclined and curious**, but not as strongly committed as the most engaged cluster.

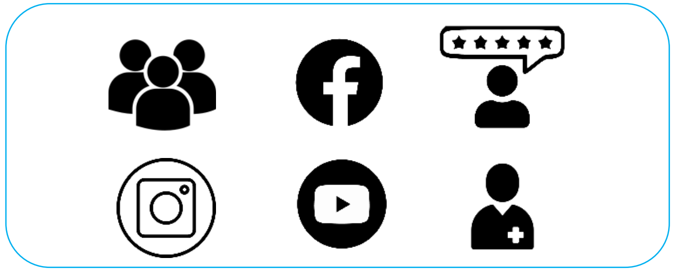
- ✓ They have higher interest in eco-lodges, eco-friendly practices, and preserving nature.
- ✓ They are motivated by learning and enrichment: exploring local cuisine, experiencing traditions, and increasing wellness knowledge.
- ✓ They also value relaxation, mood improvement, and stress reduction, though these are not their only drivers.
- ✓ Moderate but consistent support for sustainability and conservation.
- ✓ Willing to pay more for nature-based wellness activities and eco friendly services.

Eco-Experience Explorers see N-B-Well as a way to **combine wellness with discovery** — blending relaxation, cultural exploration, and eco-friendly practices. They are open-minded and appreciate variety rather than focusing on a single benefit.

Marketing implication: This group is best reached with diverse and immersive N-B-Well offers — eco-lodge stays, authentic local traditions, food experiences, and guided activities. They respond when N-B-Well is framed as a cultural and educational journey in addition to relaxation.



Info channels



Statistically significantly higher: xx% lower: xx% than in the total sample

TOURISTS SEGMENT

Nature Wellness Enthusiasts, N=636

Female 60% | Male 40%

Age	
18-24	10%
25-44	38%
45-64	38%
65+	14%

Poland 30%
Denmark 18%

Employment	
Employed Full-Time	57%
Employed Part-Time	11%
Self-Employed / Freelance	7%
Student/Not working	25%

High income (higher than average 19%)
Have children (42%)

More often longer trips to different destinations

Europe trips – 80%, average number of trips – 2,3.
South Baltics trips – 69%, average number of trips – 1,8.

More and longer trips for wellness purposes

At least one - 86%, 1-2 trips 68%, 3-5 trips 16%.

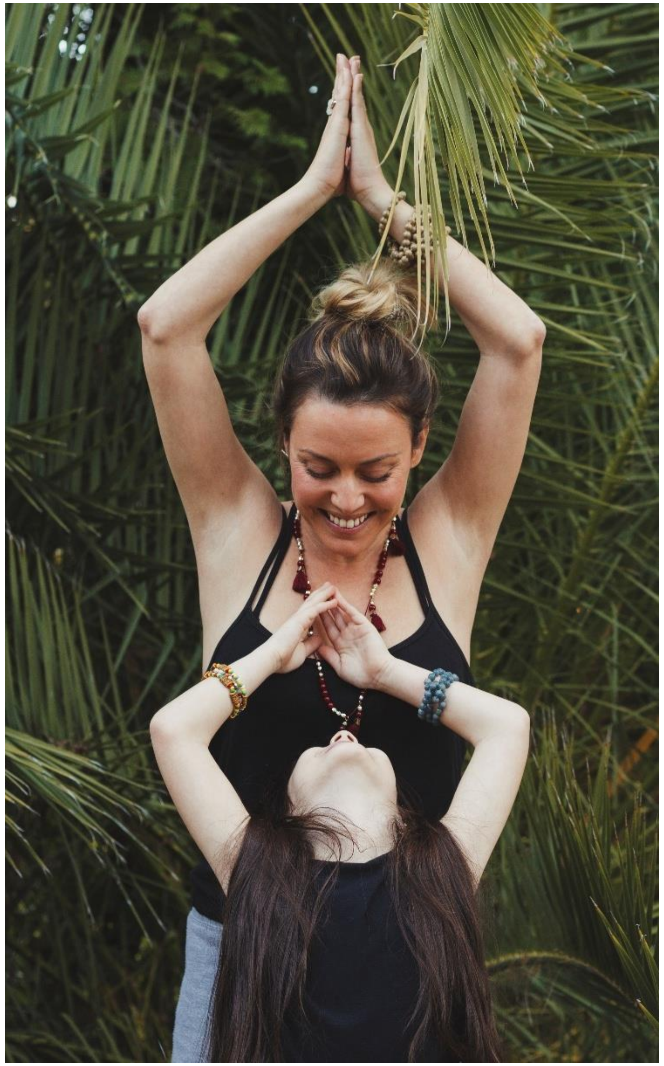
Nature aspect importance
Extremely important 44%

General profile: This segment shows the strongest agreement with nearly all N-B-Well statements. They are highly engaged and see N-B-Well as both personally and environmentally meaningful.

- ✓ They score very high on relaxation, mood improvement, stress reduction, and overall health.
- ✓ They actively seek out nature-based wellness experiences, reconnect with nature, and value escaping urban life.
- ✓ They support sustainability, conservation, and eco-friendly practices — even willing to pay more for sustainable wellness services.
- ✓ They also appreciate cultural aspects, such as traditions and indigenous practices, but their main driver is a deep connection to wellness and nature.
- ✓ Willing to pay more for nature-based wellness activities and eco friendly services.

Nature Wellness Enthusiasts represent the **core N-B-Well target group**. They are motivated by both personal well-being and ecological values, making them loyal and consistent supporters of N-B-Well tourism.

Marketing implication: This group is best reached with **premium, eco-sustainable wellness packages** that combine nature immersion, relaxation, and environmental responsibility. They are willing to invest more for authentic, sustainable, and meaningful experiences.



Info channels

Statistically significantly higher: xx% lower: xx% than in the total sample

TOURISTS SEGMENT

Wellness-Focused Supporters, N=494

Female	54%
Male	46%

Age	
18-24	10%
25-44	28%
45-64	39%
65+	23%

Country	
Lithuania	23%
Poland	12%
Germany	14%

Employed Full-Time	47%
Employed Part-Time	12%
Self-Employed / Freelance	4%
Student/Not working	36%

Low income (Less than national average 37%)
Travel to N-B-Well more often **with partner** (38%)

More often domestic traveler

Local trips – 90%, average number of trips – 4,1
Europe trips – 68%, average number of trips – 1,4
South Baltics trips – 61%, average number of trips – 1,5

Shorter trips for wellness purposes

At least one -77%, 3-5 trips 9%.

Nature aspect importance
Moderate 34%

General profile: This segment shows strong agreement with many N-B-Well statements, though not as high as Committed Eco-Wellness Enthusiasts. They are positively inclined and wellness-focused, but less intense in their commitment.

- ✓ They value relaxation, rest, and stress reduction.
- ✓ They are motivated by escaping routine, spending time outdoors, and reconnecting with nature. How
- ✓ They also show interest in overall health and well-being benefits.
- ✓ Compared to Eco-Experience Explorers, they are less driven by cultural exploration or enrichment, and compared to Nature Wellness Enthusiasts, they are less strongly committed to sustainability or paying more for eco-friendly options.

Wellness-Focused Supporters appreciate N-B-Well primarily for its personal wellness outcomes, enjoying nature as a backdrop for relaxation and health improvement.

Marketing implication: This group is best reached with wellness-centered packages highlighting rest, energy recharge, and health benefits. They respond well to **offers emphasizing comfort and relaxation** in nature, without the need for strong cultural or ecological framing.

Info channels

Statistically significantly higher: xx% lower: xx% than in the total sample

TOURISTS SEGMENT

Disinterested in N-B-Well, N=157

Female 50% | Male 50%

18-24	8%
25-44	27%
45-64	39%
65+	27%

Denmark 8%, Sweden 8%, Poland 3%, Lithuania 2%

Employed Full-Time	24%
Employed Part-Time	11%
Self-Employed / Freelance	7%
Student/Not working	55%

Lower education (Primary/Vocational 35%)
Low income (Less than national average 46%)
Don't have children (78%)
Travel to N-B-Well more often **solo** (33%)

Less often, shorter trips to different destinations

Local trips – 61%, average number of trips – 2,6
Europe trips – 55%, average number of trips – 1,2
South Baltics trips – 36%, average number of trips – 0,8

Less and shorter trips or long vacations for wellness purposes

At least one - 43%, 1-2 trips 34%, 3-5 trips 6%.
Short and easy routes for relaxation 58%
Long and challenging routes for a more adventurous experience 13%

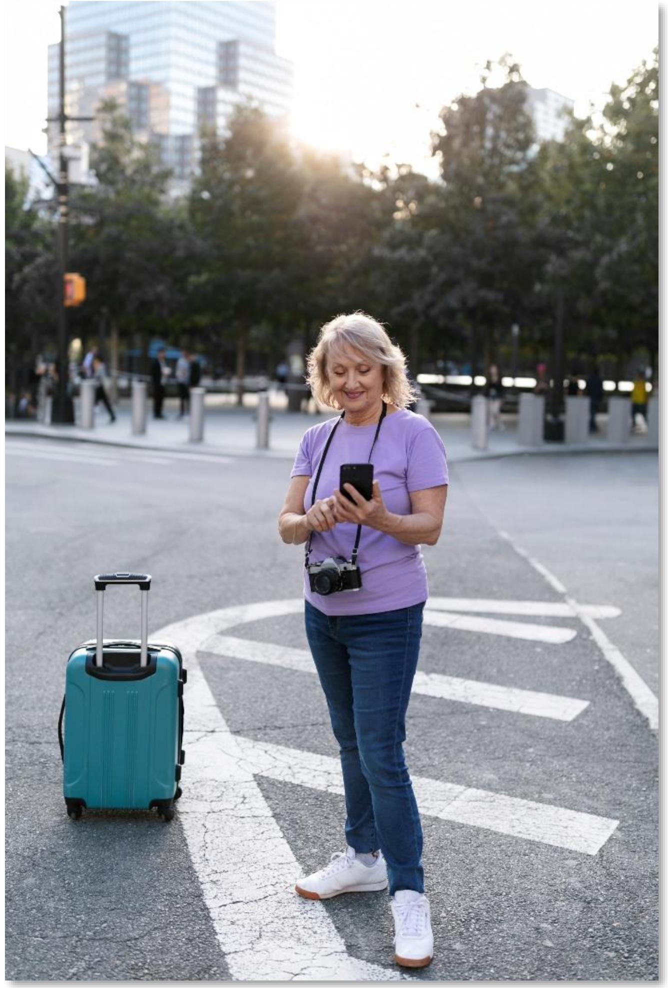
Nature aspect importance
Slightly 15%, Not important 25%

General profile: This segment shows consistently low agreement across almost all N-B-Well statements. They are **largely disengaged** from the idea of nature-based wellness tourism.

- ✓ They express little interest in relaxation, stress reduction, or wellness outcomes through N-B-Well.
- ✓ Minimal motivation to engage in nature-based activities such as reconnecting with nature, exploring landscapes, or spending time outdoors.
- ✓ Low or no support for sustainability, conservation, or eco-friendly practices.
- ✓ Wellness traditions, mindfulness, or cultural elements also hold little appeal for them.

Disinterested in N-B-Well travelers do not see N-B-Well as relevant or attractive. They may prefer other forms of tourism unrelated to wellness or nature like urban tourism or visiting family.

Marketing implication: This group is **not a priority** for N-B-Well tourism development. Efforts to attract them would likely have low return, as their motivations lie outside wellness and eco-oriented travel.



Info channels

Statistically significantly higher: xx% lower: xx% than in the total sample

Nature-Based Wellness Routes

Nature-Based Activity Routes: Top 2

Q29. What type of nature-based wellness themed routes/paths would you prefer to experience while traveling? Strongly prefer + prefer, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Respondents who Strongly Prefer Nature-based Activity Routes Profile

Hiking or nature walks for relaxation and light exercise

More often

- Respondents from Poland
- Nature Wellness Enthusiasts
- Willing to pay more
- Prioritize wellness travel a few times a year
- Long and challenging routes for a more adventurous experience
- Average or high spenders on NWB

Less often

- Respondents from Lithuania and Denmark
- Casual Participants
- Disinterested
- Rural area residents
- Willing to pay a small amount for NWB
- Not willing to pay
- Short and easy routes for relaxation
- With children
- 0 trips – I do not take trips for wellness purposes
- Low spending on NWB

Yoga, meditation and mindfulness trails in nature

More often

- Respondents from Germany
- Female
- Age 18-44
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- With children
- 3-5 trips per year – I prioritize wellness travel a few times a year
- 6 or more trips per year – I frequently travel for wellness experiences
- NWB travel solo
- Employed Full-Time
- Medium travel time
- Average or high spenders on NWB

Less often

Respondents from Lithuania
Male
Age 65+
Casual Travelers
Disinterested
Wellness-Focused Supporters
Willing to pay a small amount
In a relationship without children
Student/Not working
Moderately willing to pay
0 trips – I do not take trips for wellness purposes
Low spending on NWB

Eco-friendly cycling routes promoting both wellness and environmental awareness

More often

- Respndents from Poland
- Age 18-44
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- With children
- 3-5 trips per year – I prioritize wellness travel a few times a year
- 6 or more trips per year – I frequently travel for wellness experiences
- NWB travel with friends
- Average or high spenders on NWB

Less often

- Respondents from Lithuania and Denmark
- Age 45+
- Residents of rural areas
- Casual Travelers
- Disinterested
- Wellness-Focused Supporters
- Moderately willing to pay
- Willing to pay a small amount
- Not willing to pay
- 0 trips – I do not take trips for wellness purposes
- Student/Not working
- NWB travel with colleagues
- NWB travel with relatives
- Low spending on NWB

Water-based wellness activities around sea, lakes or the rivers

More often

- Respondents from Germany
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- With children
- Employed Full-Time
- 3-5 trips per year – I prioritize wellness travel a few times a year
- Short and easy routes for relaxation
- Average or high spenders on NWB

Less often

- Respondents from Denmark
- Age 65+
- Casual Travelers
- Disinterested
- Single without children
- Student/Not working
- Medium-length routes with a mix of relaxation and light physical activity
- 0 trips – I do not take trips for wellness purposes
- Moderately willing to pay
- Willing to pay a small amount
- Not willing to pay
- Low spending on NWB

Respondents who Strongly Prefer Nature-based Activity Routes Profile

Forest therapy and sensory trails through breathing exercises and sensory engagement

More often

- Respondents from Poland
- Age 25-44
- Urban
- With children
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- 3-5 trips per year – I prioritize wellness travel a few times a year
- 6 or more trips per year – I frequently travel for wellness experiences
- Long and challenging routes for a more adventurous experience
- Pay 100 + EUR for NWB

Less often

- Respondents from Lithuania
- Age 45+
- Student/Not working
- Casual Travelers
- Disinterested
- Wellness-Focused Supporters
- Moderately willing to pay
- Willing to pay a small amount
- Not willing to pay
- 0 trips – I do not take trips for wellness purposes
- Medium-length routes with a mix of relaxation and light physical activity
- Spend less than € 100 on NWB

Foraging therapy through picking berries, mushrooms, and herbs in nature

More often

- Respondents from Poland
- With children
- Self-Employed / Freelance
- Nature Wellness Enthusiasts
- 3-5 trips per year – I prioritize wellness travel a few times a year
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- Pay 301 + EUR for NWB

Less often

- Respondents from Denmark
- Age 45-64
- Single without children
- Wellness-Focused Supporters
- Casual Travelers
- Disinterested
- Moderately willing to pay
- Willing to pay a small amount
- Not willing to pay
- 0 trips – I do not take trips for wellness purposes
- Spend less than € 100 on NWB

Year-round outdoor activities routes in nature with cozy, functional and sustainable outdoor spaces / Scandinavian Outdoor Living

More often

- Respndents from Poland
- Age 18-44
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- With children
- 3-5 trips per year – I prioritize wellness travel a few times a year
- 6 or more trips per year – I frequently travel for wellness experiences
- NWB travel with friends
- Average or high spenders on NWB

Less often

- Respondents from Lithuania
- Age 45+
- NWB travel with spouse/partner
- Student/Not working
- Wellness-Focused Supporters
- Casual Travelers
- Disinterested
- Moderately to not willing to pay
- 0 trips – I do not take trips for wellness purposes
- Spend less than € 100 on NWB

Nature observation routes designed for reconnecting with nature through observing wildlife in their natural habitat

More often

- Respondents from Poland
- Age 25-44
- In a relationship with children living at home
- Nature Wellness Enthusiasts
- Willing to pay for premium nature-based wellness activities
- Willing to pay a quite significant amount
- Pay 301 + EUR for NWB
- 3-5 trips per year – I prioritize wellness travel a few times a year
- Long and challenging routes for a more adventurous experience

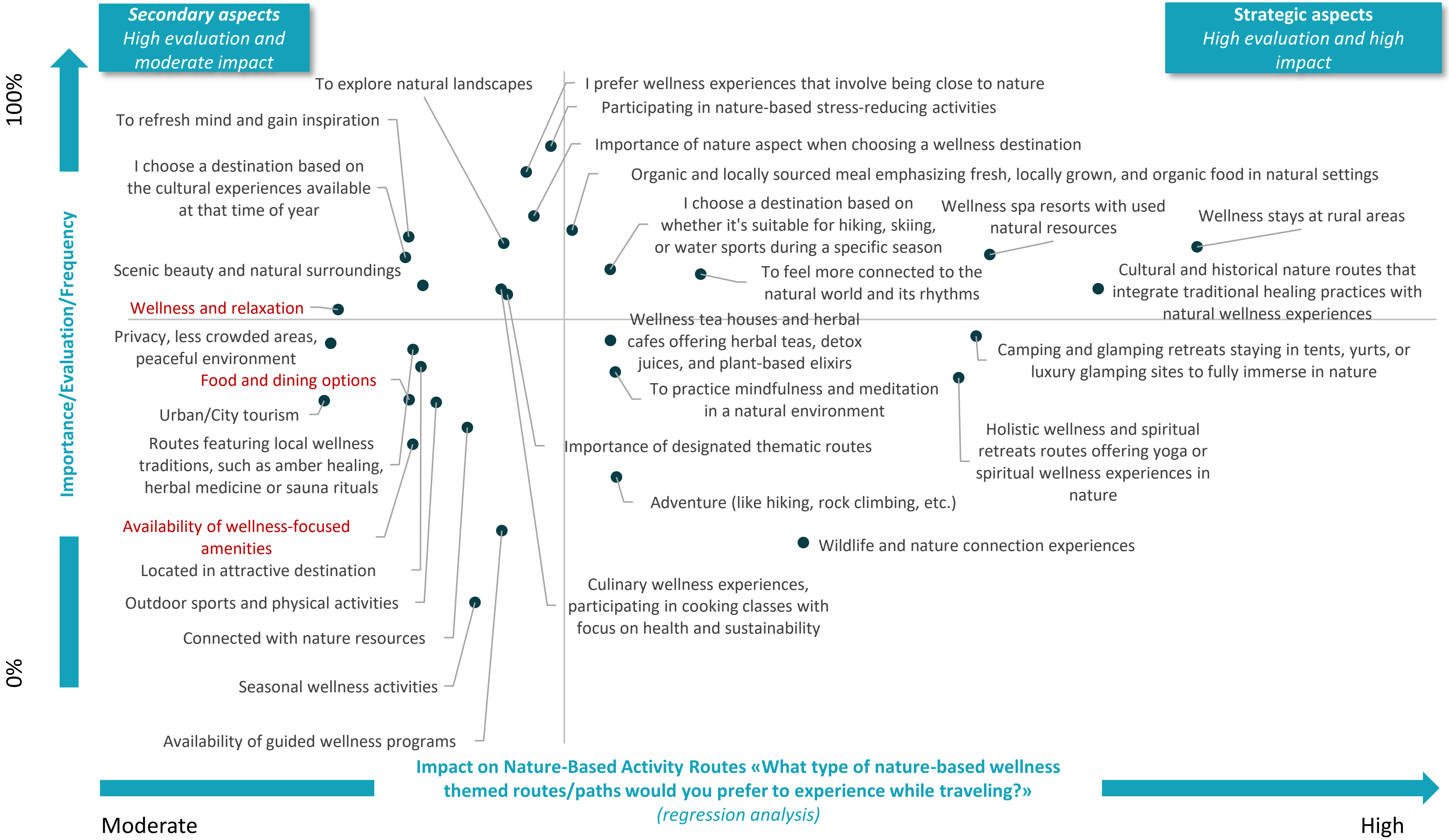
Less often

- Respondents from Lithuania
- Age 45+
- Respondents with higher education
- Wellness-Focused Supporters
- Casual Travelers
- Disinterested
- Moderately to not willing to pay
- 0 trips – I do not take trips for wellness purposes
- Spend less than € 100 on NWB

Regression Analysis

Drivers of Nature-Based Activity Routes

*The depicted attributes in total **influence 74% of Nature-Based Activity Routes («What type of nature-based wellness themed routes/paths would you prefer to experience while traveling?»)** (with 95% probability). Red attributes have negative impact. Other attributes have lower probability and are not depicted.*



How to read this chart:

The vertical axis shows how often travelers value or mention each aspect.

The horizontal axis shows how strongly each aspect influences the choice of nature-based wellness routes.

Top right quadrant: Strategic drivers – highly valued and with strong impact, the main focus for product design and promotion.

Top left quadrant: Secondary aspects – highly valued but less decisive, useful as supporting messages.

Bottom right quadrant: Niche opportunities – lower in evaluation but can still influence certain groups.

Bottom left quadrant (and red): Low priority or negative aspects – weak or harmful drivers that should not be emphasized.

Nature-Based Activity Routes are combined into one index

Wellness-Oriented Retreats: Top 2

Q29. What type of nature-based wellness themed routes/paths would you prefer to experience while traveling? Strongly prefer + prefer, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

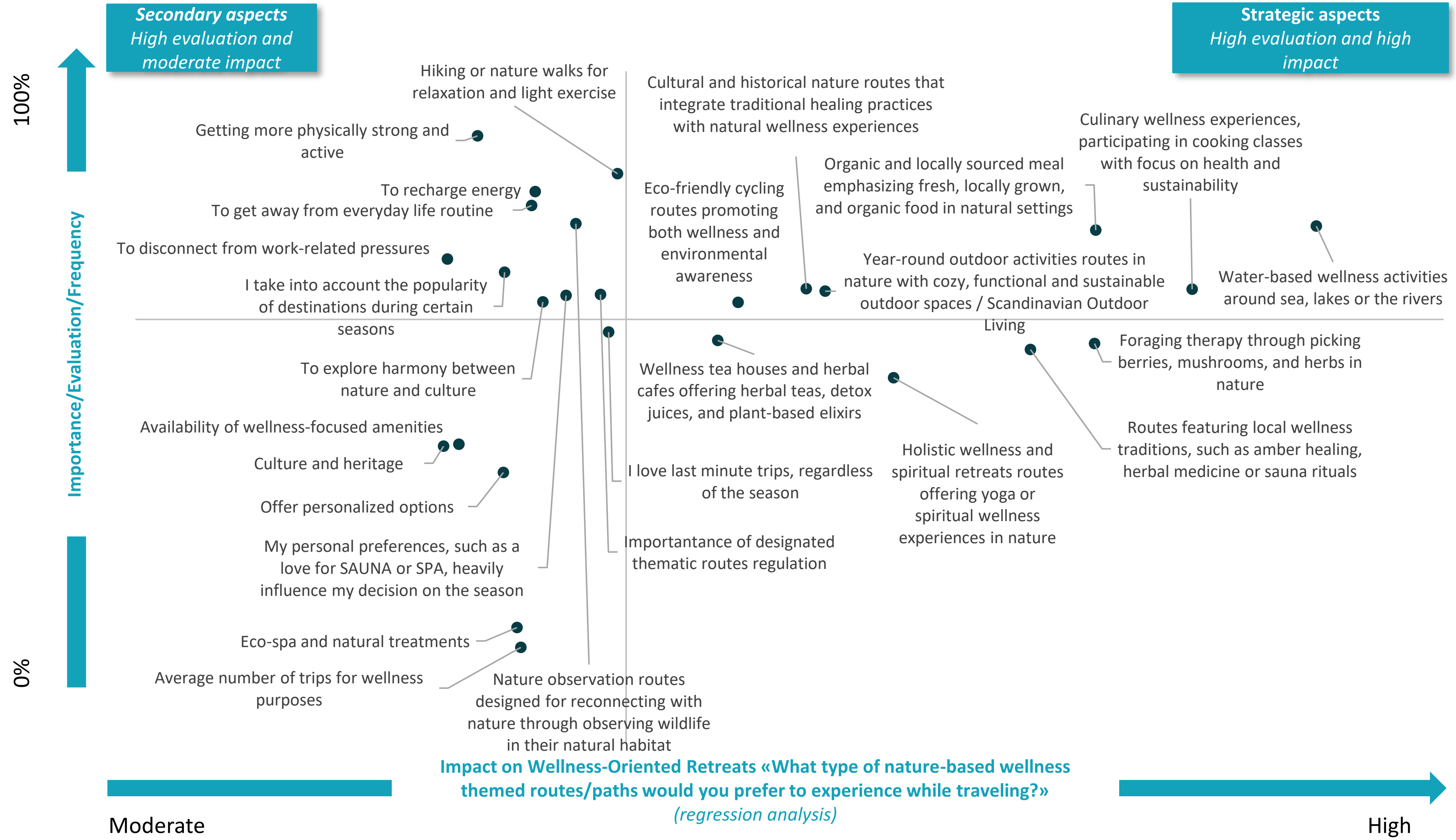
Respondents who Strongly Prefer Wellness-Oriented Retreats Profile

Wellness spa resorts with used natural resources: mud, mineral waters, geothermically waters, ect.		Wellness stays at rural areas (organic farms, offering fresh natural food, ect.)		Camping and glamping retreats staying in tents, yurts, or luxury glamping sites to fully immerse in nature	
More often	**Less often**	**More often**	**Less often**	**More often**	**Less often**
• Female • Age 18-24 • With children • Employed Full-Time • Income higher than national average • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • Pay 201 + EUR for NWB	• Male • Age 65+ • Single without children • Student/Not working • Wellness-Focused Supporters • Casual Travelers • Disinterested • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Spend less than € 100 on NWB	• Respondents from Poland • Age 18-44 • NWB travel with friends • In a relationship with children living at home • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • Pay 301 + EUR for NWB • Length of typical trip: one week	• Respondents from Lithuania • Age 45-64 • Casual Travelers • Disinterested • Wellness-Focused Supporters • In a relationship without children • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Spend less than € 100 on NWB	• Respondents from Poland • Age 18-44 • With children • Employed Full-Time • NWB travel with friends • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • 6 or more trips per year – I frequently travel for wellness experiences • Pay 301 + EUR for NWB	• Respondents from Lithuania • Age 45+ • Residents of rural areas • Student/Not working • In a relationship without children • NWB travel with relatives • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Spend less than € 100 on NWB

Regression Analysis

Drivers of Wellness-Oriented Retreats

The depicted attributes in total influence 65% of Wellness-Oriented Retreats («What type of nature-based wellness themed routes/paths would you prefer to experience while traveling?») (with 95% probability). Red attributes have negative impact. Other attributes have lower probability and are not depicted.



How to read this chart:

The vertical axis shows how often travelers value or mention each aspect.

The horizontal axis shows how strongly each aspect influences the choice of nature-based wellness routes.

Top right quadrant: Strategic drivers – highly valued and with strong impact, the main focus for product design and promotion.

Top left quadrant: Secondary aspects – highly valued but less decisive, useful as supporting messages.

Bottom right quadrant: Niche opportunities – lower in evaluation but can still influence certain groups.

Bottom left quadrant (and red): Low priority or negative aspects – weak or harmful drivers that should not be emphasized.

Wellness-Oriented Retreats are combined into one index

Culinary and Food Experiences: Top 2

Q29. What type of nature-based wellness themed routes/paths would you prefer to experience while traveling? Strongly prefer + prefer, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

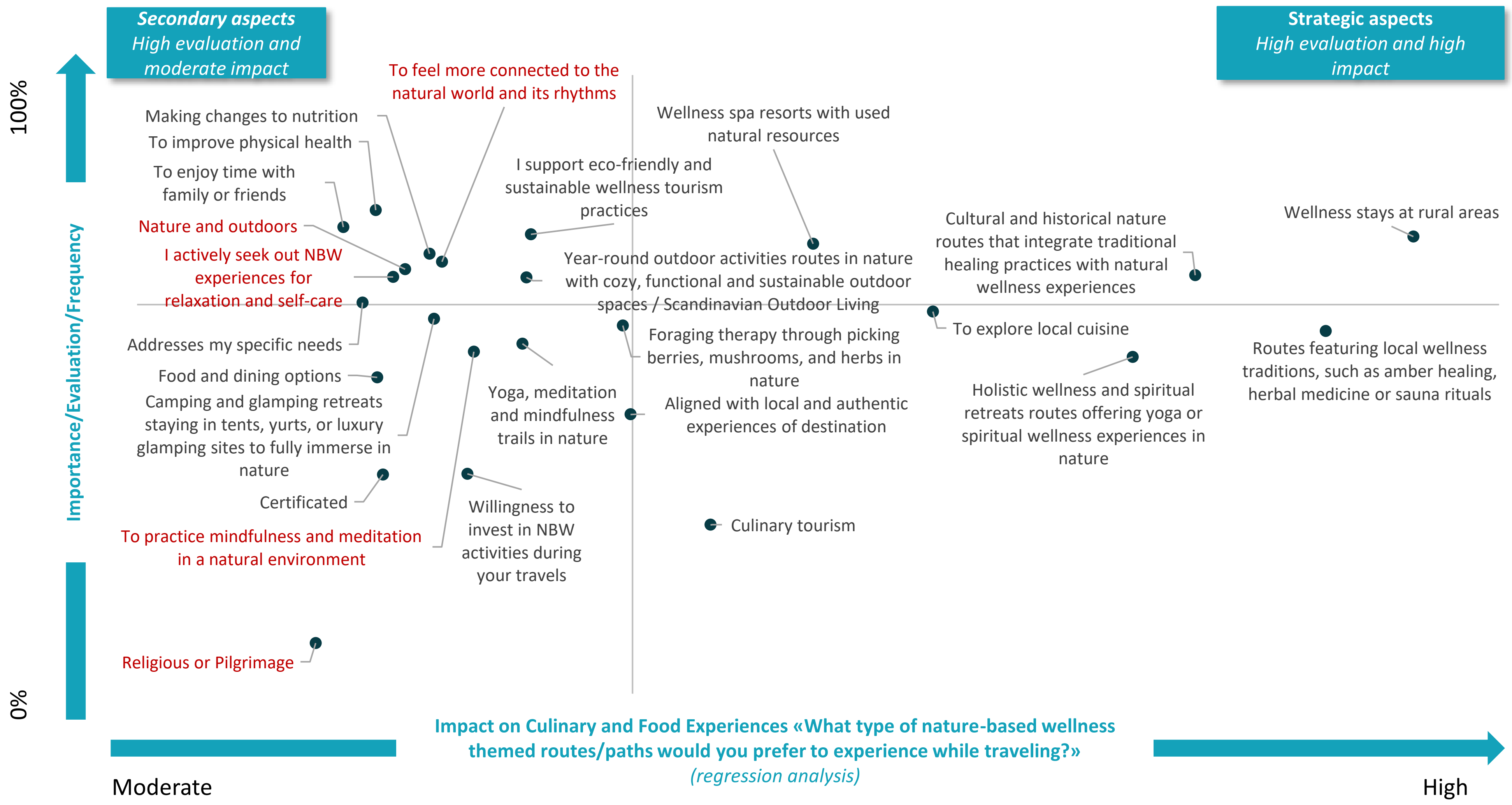
Respondents who Strongly Prefer Culinary and Food Experiences Profile

Wellness tea houses and herbal cafes offering herbal teas, detox juices, and plant-based elixirs		Culinary wellness experiences, participating in cooking classes with focus on health and sustainability		Organic and locally sourced meal emphasizing fresh, locally grown, and organic food in natural settings	
More often	**Less often**	**More often**	**Less often**	**More often**	**Less often**
• Respondents from Poland and Germany • Age 18-44 • Higher than national average income • With children • Employed Full-Time • NWB travel with friends • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • 6 or more trips per year – I frequently travel for wellness experiences • Pay 101 + EUR for NWB	• Age 45+ • Residents of rural areas • Student/Not working • Less than national average income • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Length of typical trip: 1 day visit • Spend less than € 100 on NWB	• Respondents from Germany • Age 18-44 • With children • Employed Full-Time • NWB travel with friends • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • 6 or more trips per year – I frequently travel for wellness experiences • Pay 301 + EUR for NWB	• Respondents from Lithuania • Age 45+ • Student/Not working • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Spend less than € 100 on NWB	• Respondents from Poland • Age 25-44 • With children • Employed • Higher than national average income • NWB travel with friends • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • Pay 101 - 400 EUR for NWB	• Respondents from Lithuania • Student/Not working • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Length of typical trip: 1 day visit • Spend less than € 100 on NWB

Regression Analysis

Drivers of Culinary and Food Experiences

*The depicted attributes in total **influence 66% of Culinary and Food Experiences («What type of nature-based wellness themed routes/paths would you prefer to experience while traveling?»)** (with 95% probability). Red attributes have negative impact. Other attributes have lower probability and are not depicted.*



How to read this chart:

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The horizontal axis shows how strongly each aspect influences the choice of nature-based wellness routes.

Top right quadrant: Strategic drivers – highly valued and with strong impact, the main focus for product design and promotion.

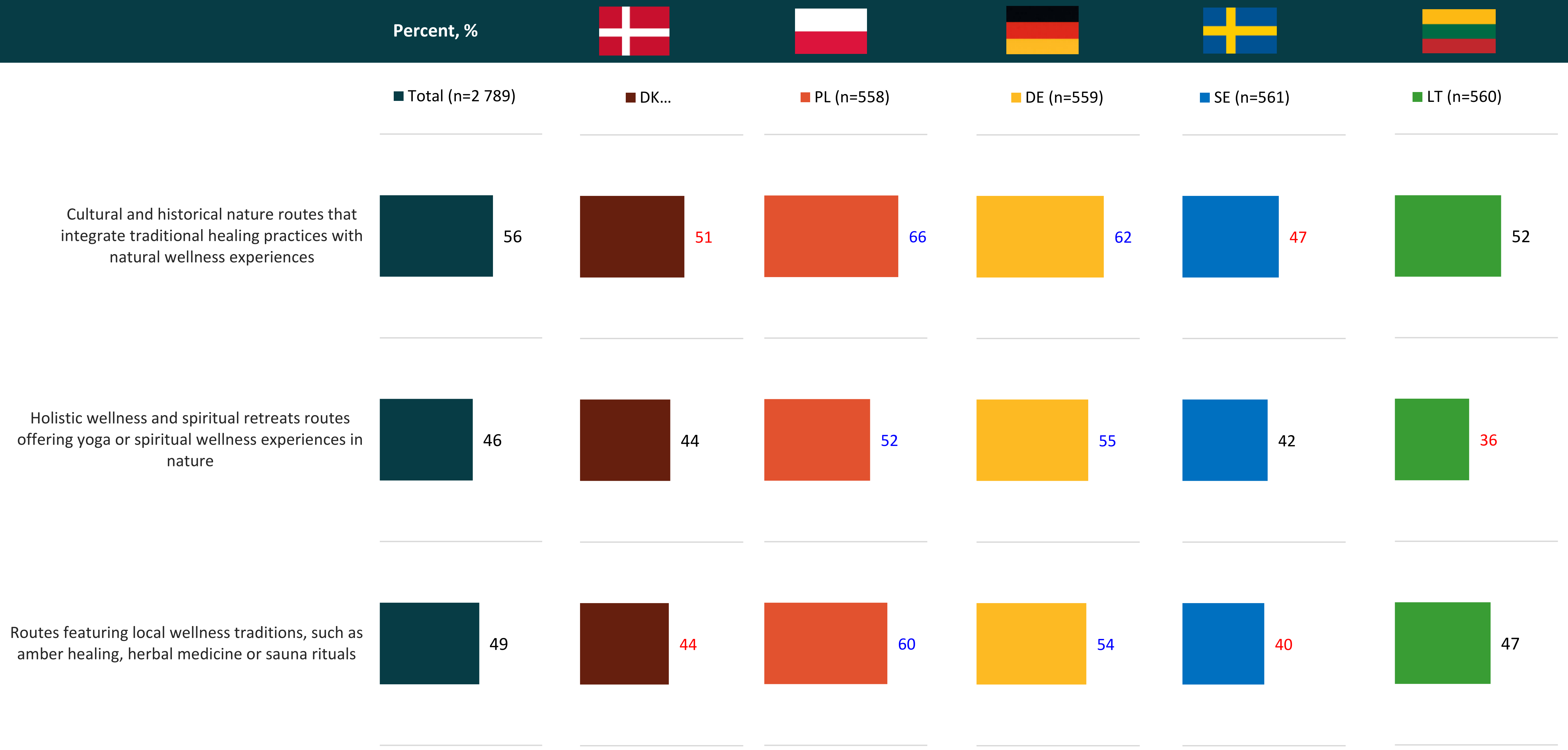
Top left quadrant: Secondary aspects – highly valued but less decisive, useful as supporting messages.

Bottom right quadrant: Niche opportunities – lower in evaluation but can still influence certain groups.

Bottom left quadrant (and red): Low priority or negative aspects – weak or harmful drivers that should not be emphasized.

Culinary and Food Experiences are combined into one index

Cultural and Holistic Wellness Routes: Top 2



Q29. What type of nature-based wellness themed routes/paths would you prefer to experience while traveling? Strongly prefer + prefer, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

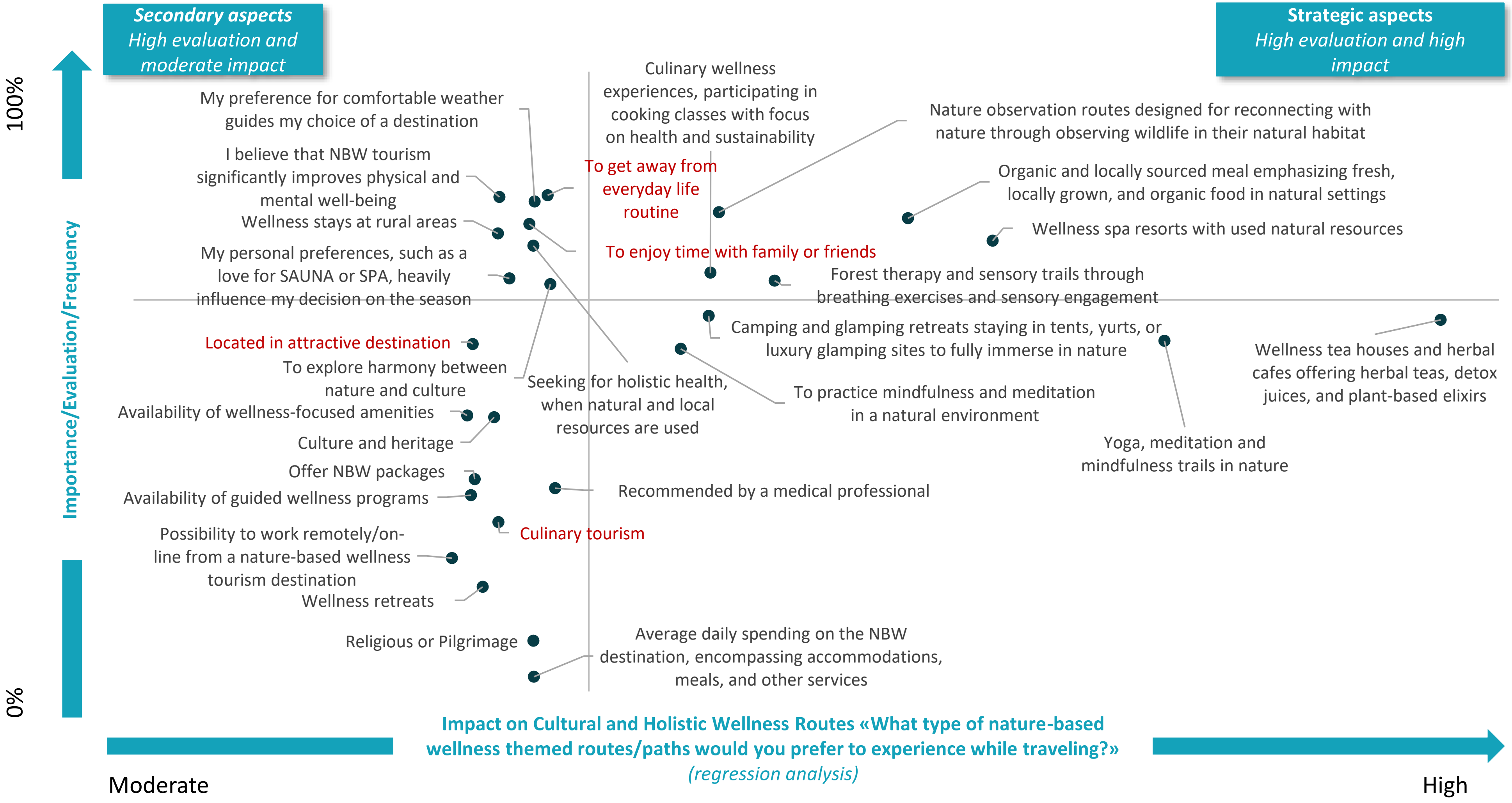
Respondents who Strongly Prefer Cultural and Holistic Wellness Routes Profile

Cultural and historical nature routes that integrate traditional healing practices with natural wellness experiences		Holistic wellness and spiritual retreats routes offering yoga or spiritual wellness experiences in nature		Routes featuring local wellness traditions, such as amber healing, herbal medicine or sauna rituals	
More often	**Less often**	**More often**	**Less often**	**More often**	**Less often**
• Respondents from Germany and Poland • Age 18-44 • With children • Employed Full-Time • Higher than national average income • NWB travel with friends • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • Pay 101 + EUR for NWB • Length of typical trip: one week • Short and easy routes for relaxation	• Respondents from Lithuania • Age 45+ • In a relationship without children • Student/Not working • Less than national average income • NWB travel with spouse/partner • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Medium-length routes with a mix of relaxation and light physical activity • Spend less than € 100 on NWB	• Respondents from Germany • Age 18-44 • With children • Employed Full-Time • NWB travel with friends or solo • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • 6 or more trips per year – I frequently travel for wellness experiences • Pay 101 + EUR for NWB • Short and easy routes for relaxation • Length of typical trip: 4 – 6 days	• Respondents from Lithuania • Age 45+ • In a relationship without children • Student/Not working • NWB travel with spouse/partner or relatives • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Medium-length routes with a mix of relaxation and light physical activity • Spend less than € 100 on NWB • Length of typical trip: 1 day visit	• Respondents from Poland • Age 18-44 • With children • Employed Full-Time • Nature Wellness Enthusiasts • Willing to pay for premium nature-based wellness activities • Willing to pay a quite significant amount • 3-5 trips per year – I prioritize wellness travel a few times a year • 6 or more trips per year – I frequently travel for wellness experiences • Pay 201 + EUR for NWB • Length of typical trip: 4 – 6 days	• Respondents from Sweden • Age 45+ • Student/Not working • Single without children • Casual Travelers • Disinterested • Wellness-Focused Supporters • Moderately to not willing to pay • 0 trips – I do not take trips for wellness purposes • Medium-length routes with a mix of relaxation and light physical activity • Spend less than € 100 on NWB

Regression Analysis

Drivers of Cultural and Holistic Wellness Routes

*The depicted attributes in total **influence 70% of Cultural and Holistic Wellness Routes («What type of nature-based wellness themed routes/paths would you prefer to experience while traveling?»)** (with 95% probability).*
Red attributes have negative impact. Other attributes have lower probability and are not depicted.



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Top left quadrant: Secondary aspects – highly valued but less decisive, useful as supporting messages.

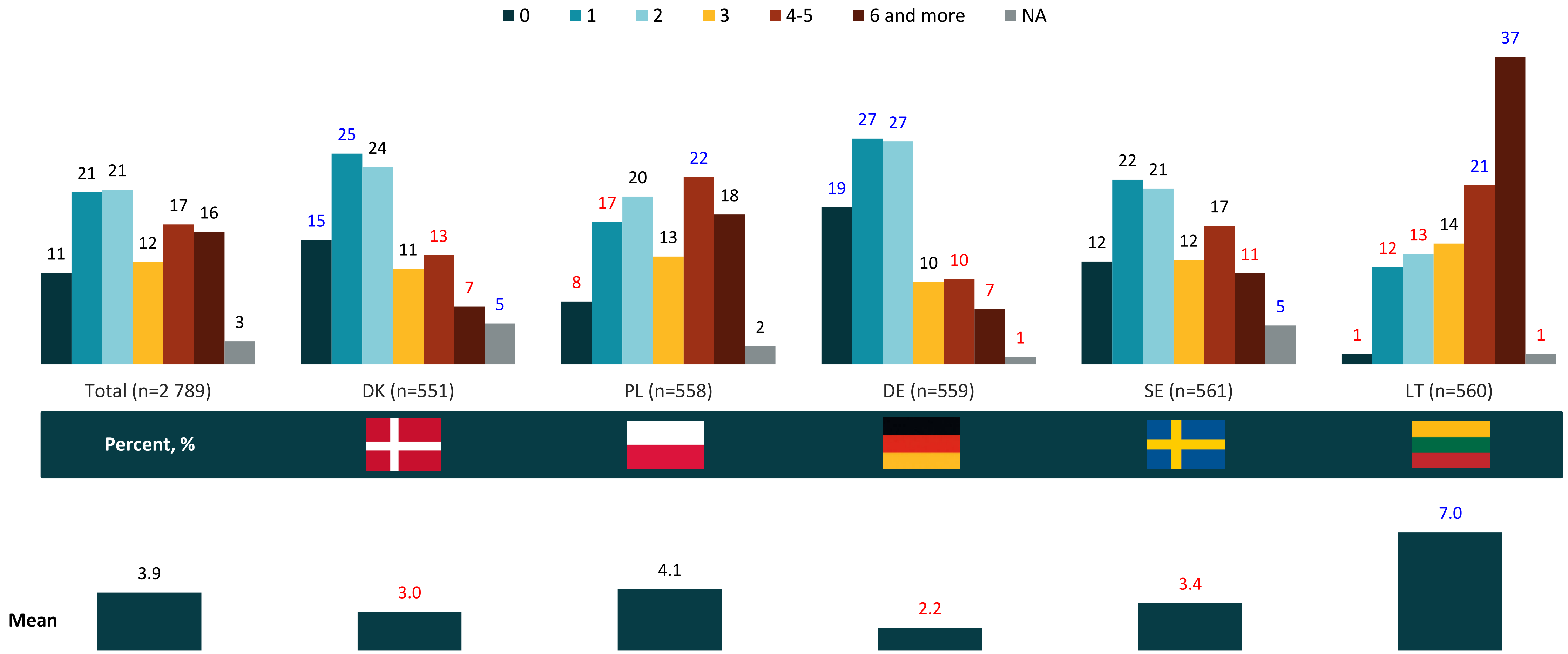
Bottom right quadrant: Niche opportunities – lower in evaluation but can still influence certain groups.

Bottom left quadrant (and red): Low priority or negative aspects – weak or harmful drivers that should not be emphasized.

Cultural and Holistic Wellness Routesare combined into one index

Nature-Based Wellness Travel Experiences and Expectations

The Average Number of Trips per Year in a Country of Residence

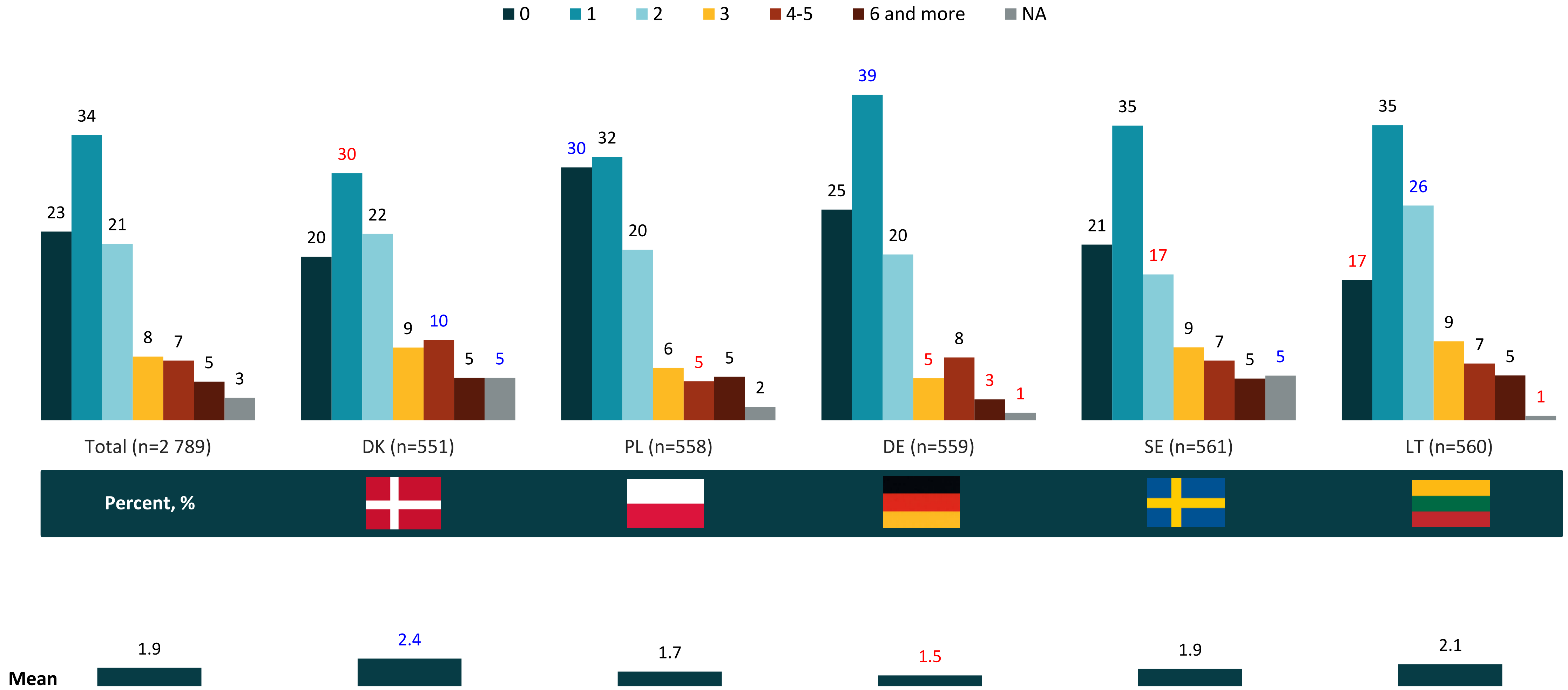


Q11_1. What in general is your average number of tourism trips per year in these areas: in your country of residence?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Average Number of Trips per Year in Europe

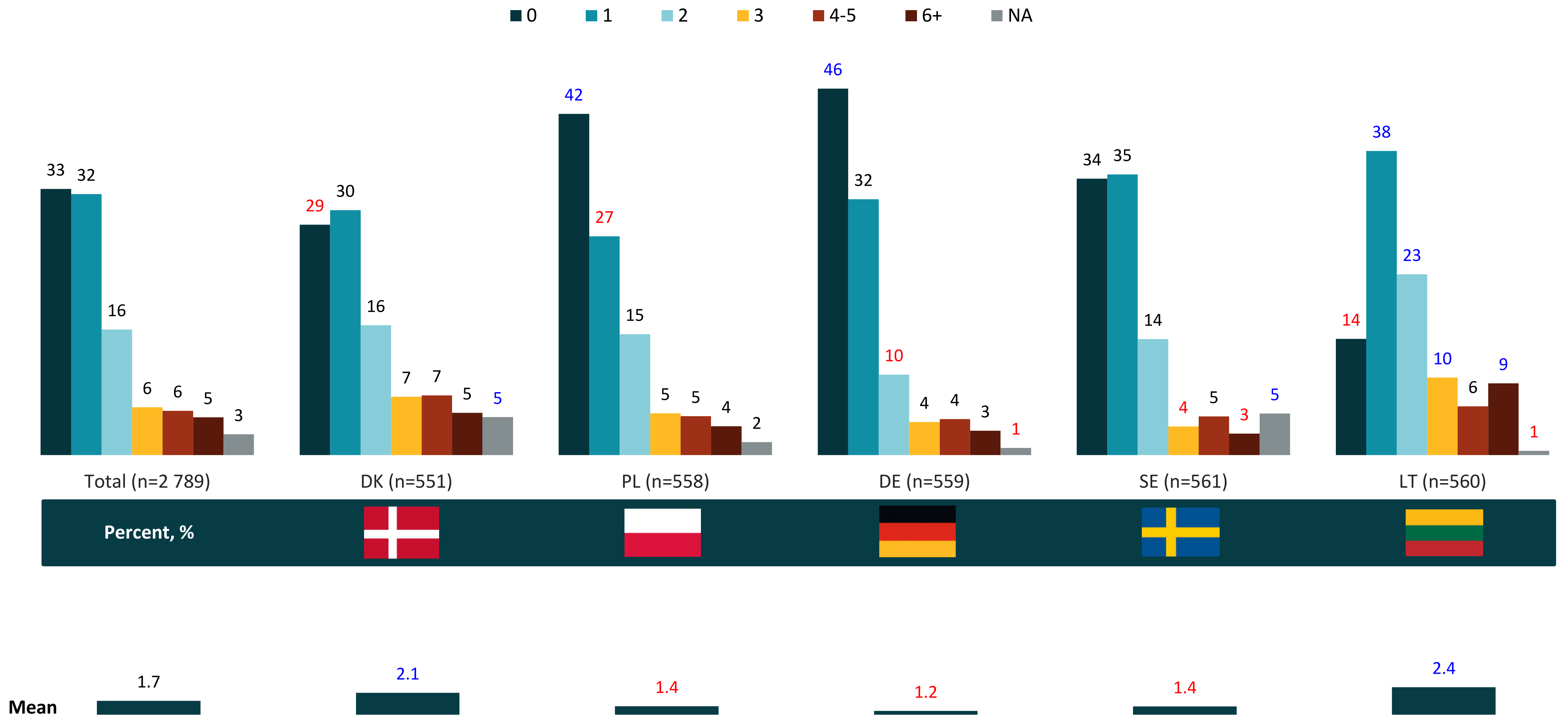


Q11_2. What in general is your average number of tourism trips per year in these areas: in Europe (excluding your country of residence)?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Average Number of Trips per Year in the South Baltic Sea Region

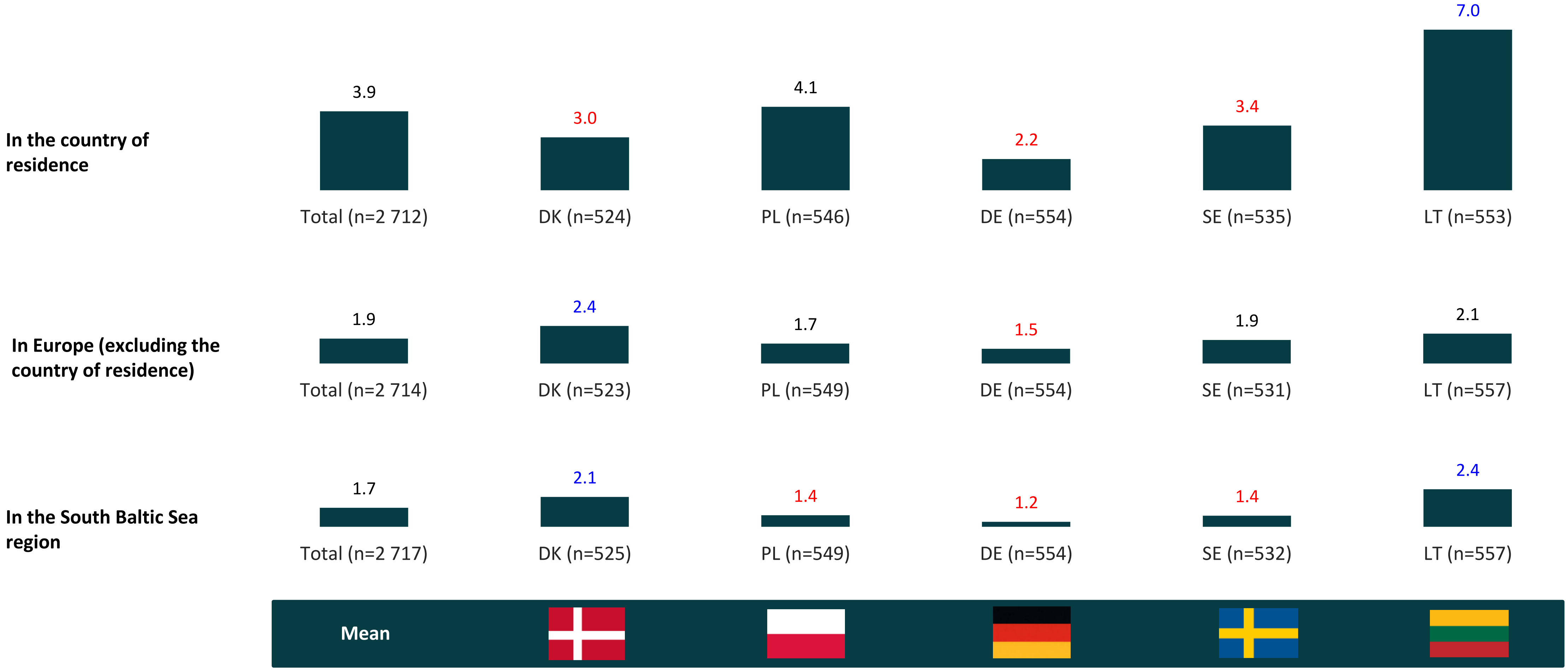


Q11_3. What in general is your average number of tourism trips per year in these areas: in the South Baltic Sea region (Sweden, Denmark, Germany, Lithuania, Poland)?

Sample: All respondents

Statistically significantly <u>higher</u>: xx <u>lower:</u> xx than in the total sample

The Average Number of Trips per Year in Different Areas

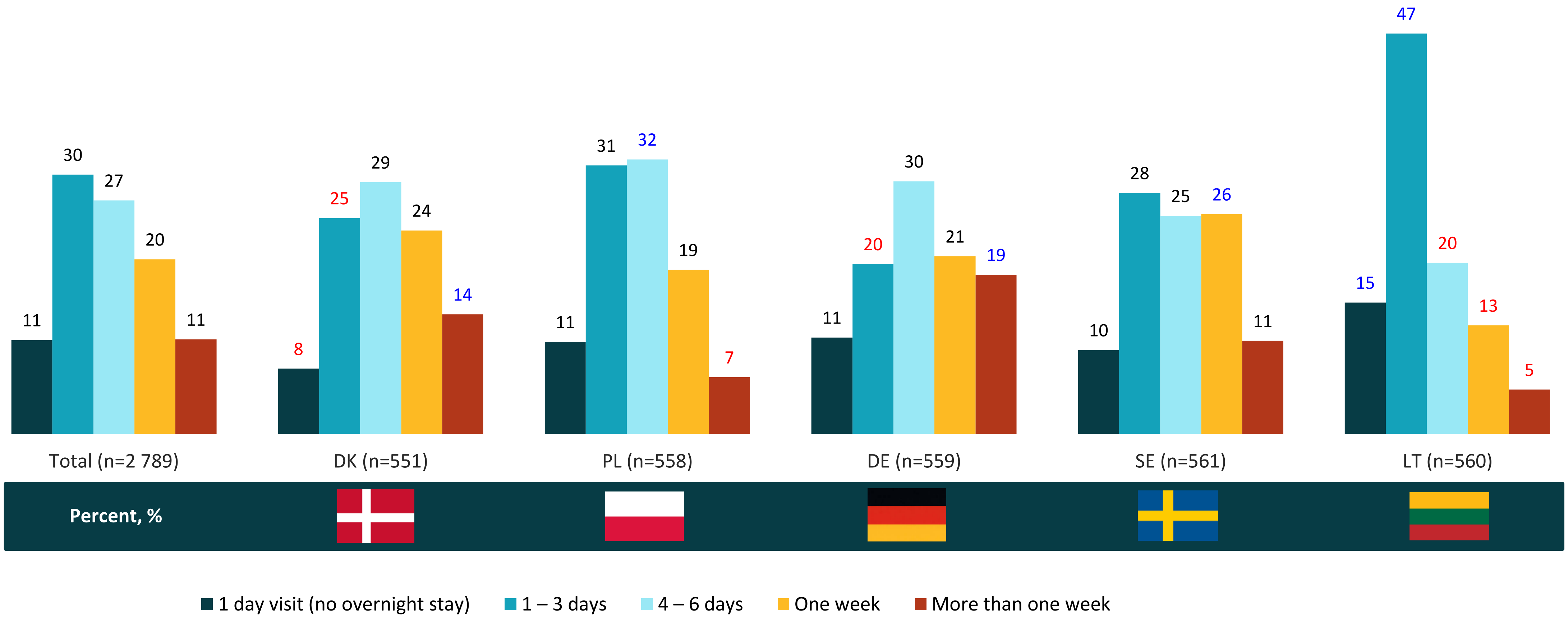


Q11. What in general is your average number of tourism trips per year in these areas:

Sample: Respondents who specified the number

Statistically significantly higher: xx lower: xx than in the total sample

The Length of a Typical Trip



Q12. What is the common length of your typical trip?
Sample: All respondents

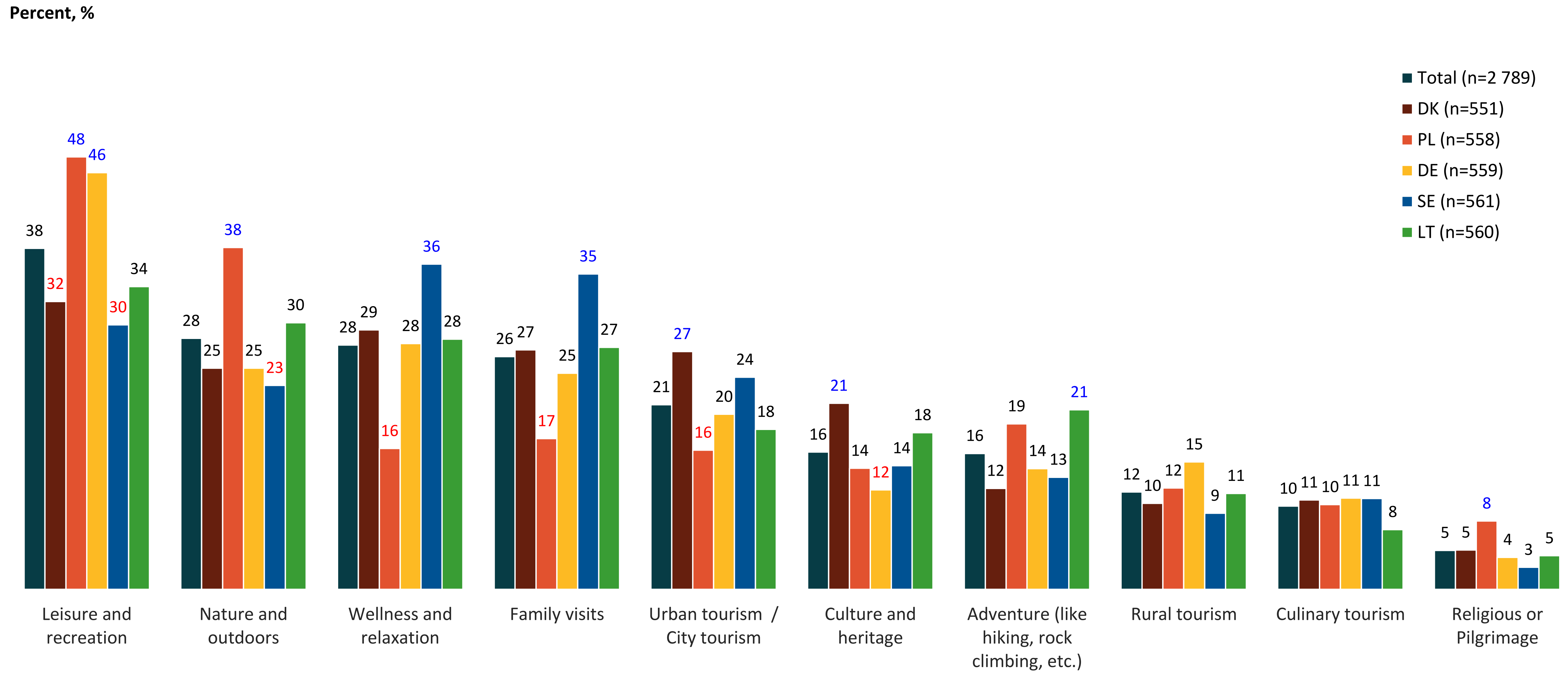
Statistically significantly higher: xx lower: xx than in the total sample

Primary Purpose of Travel: Top 2

Q13. What is usually the primary purpose of your travel? Please, rate from 1 to 10, where 10 – most important and 1 – least important.
Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

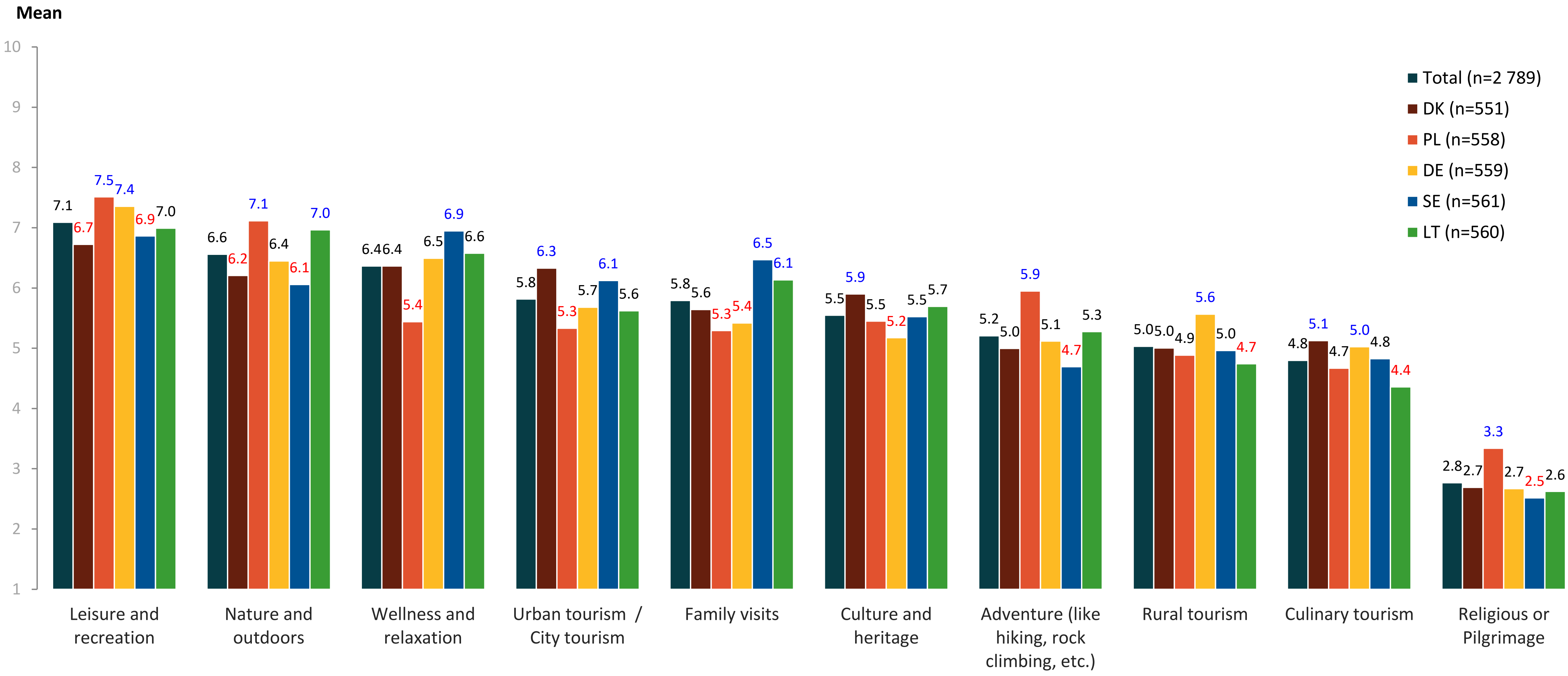
Primary Purpose of Travel: Top 2



Q13. What is usually the primary purpose of your travel? Please, rate from 1 to 10, where 10 – most important and 1 – least important.
Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Primary Purpose of Travel: Mean

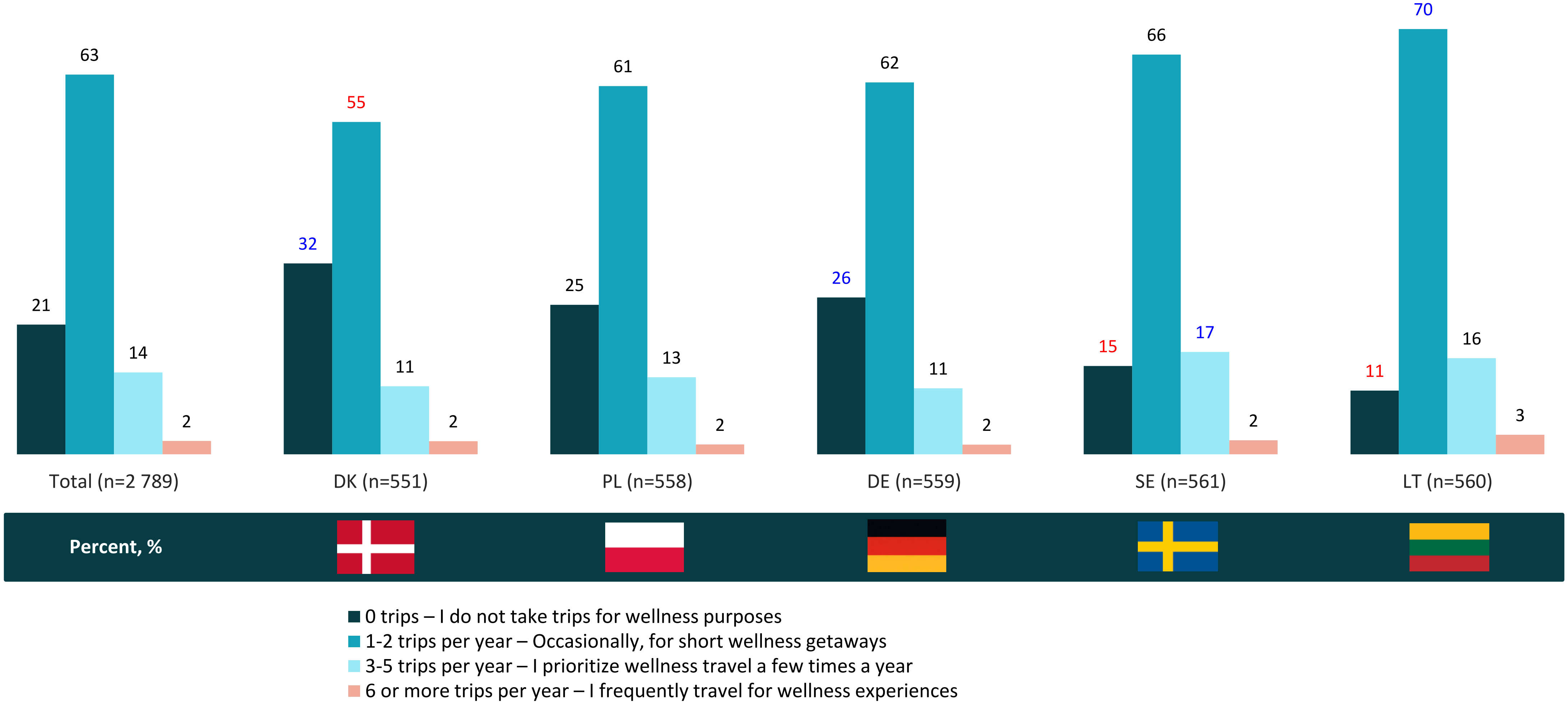


Q13. What is usually the primary purpose of your travel? Please, rate from 1 to 10, where 10 – most important and 1 – least important.

Sample: All respondents - sorted by total mean

Statistically significantly <u>higher</u>: x,x <u>lower:</u> x,x than in the total sample

The Average Number of Trips for Wellness Purposes

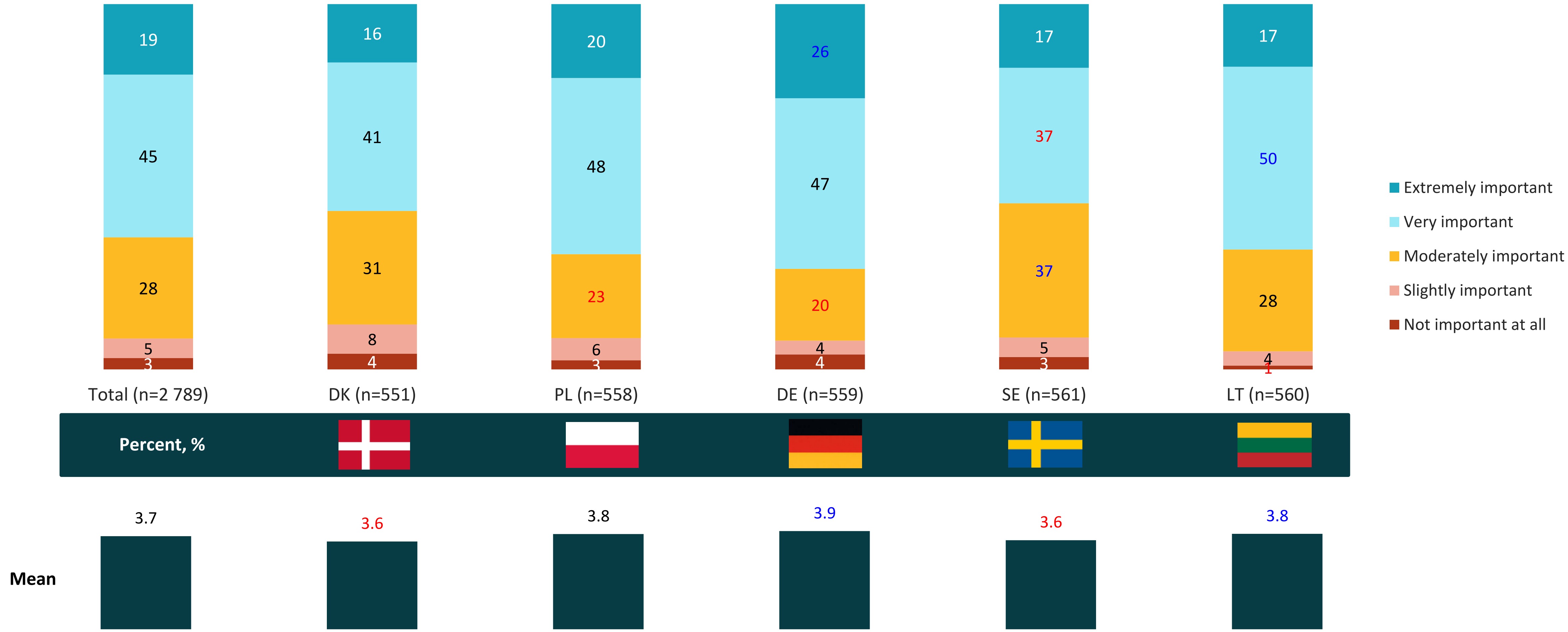


Q14. What is the average number of your trips for wellness purposes?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Importance of Nature Aspect when Choosing a Wellness Destination

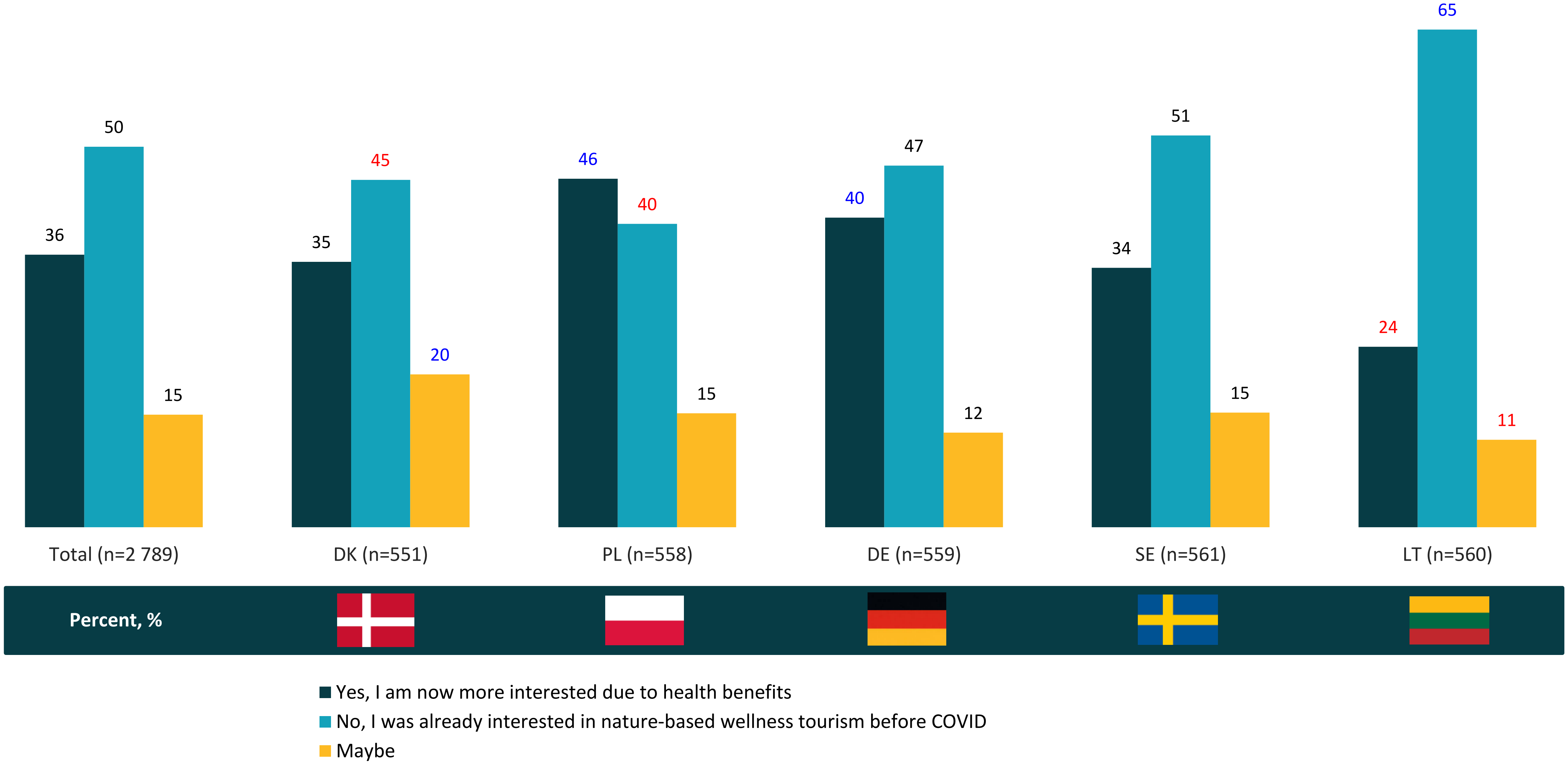


Q15. How important is the nature aspect when choosing a wellness destination?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Change of Interest in Nature-Based Wellness Tourism due to Post-Covid Health Concerns



Q16. Has your interest in nature-based wellness tourism increased due to post-COVID health concerns?
Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

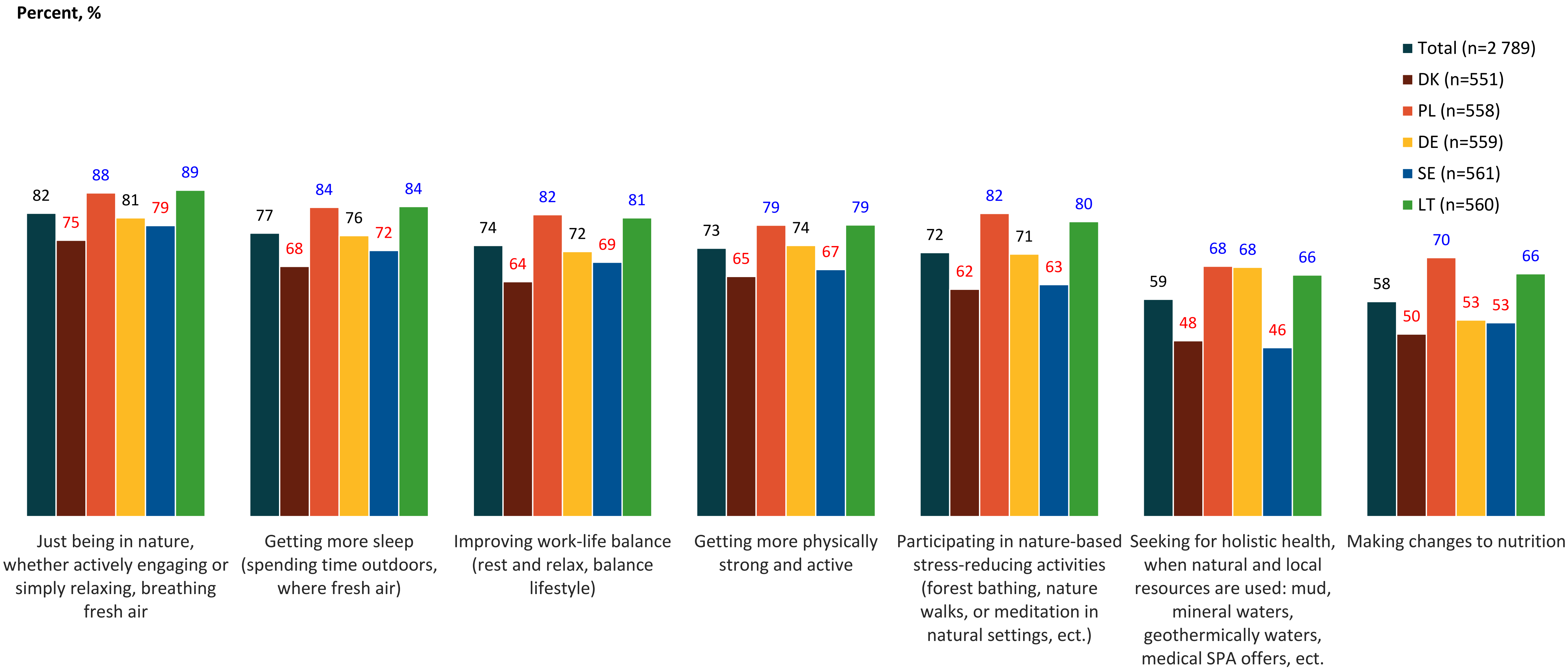
Nature-Based Wellness Personal Meaning: Top 2

Q17. What does nature-based wellness personally mean to you? 5 – very important, 1 – not important at all.

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Personal Meaning: Top 2

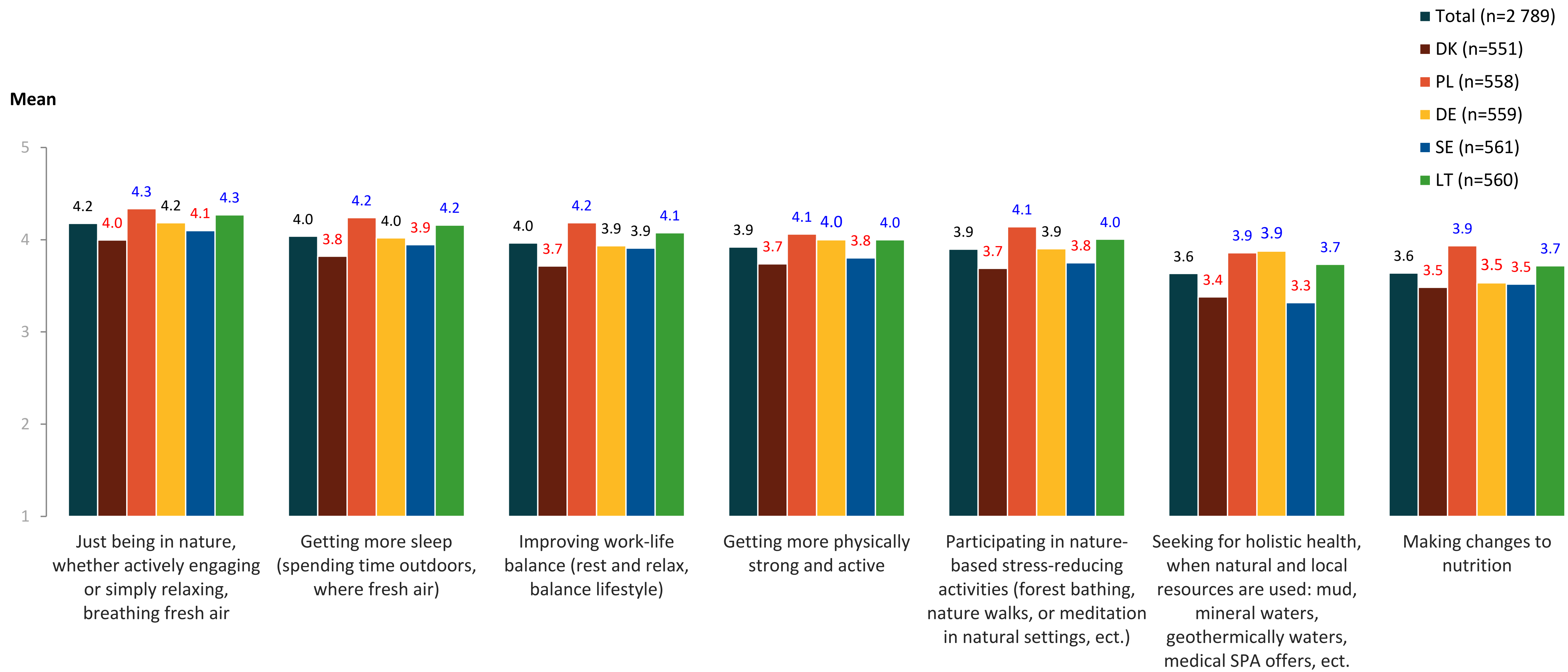


Q17. What does nature-based wellness personally mean to you? 5 – very important, 1 – not important at all

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Personal Meaning: Mean



Q17. What does nature-based wellness personally mean to you? 5 – very important, 1 – not important at all

Sample: All respondents - sorted by total mean

Statistically significantly <u>higher</u>: x,x <u>lower:</u> x,x than in the total sample

Participation in N-B-Well Activities During the Last Year

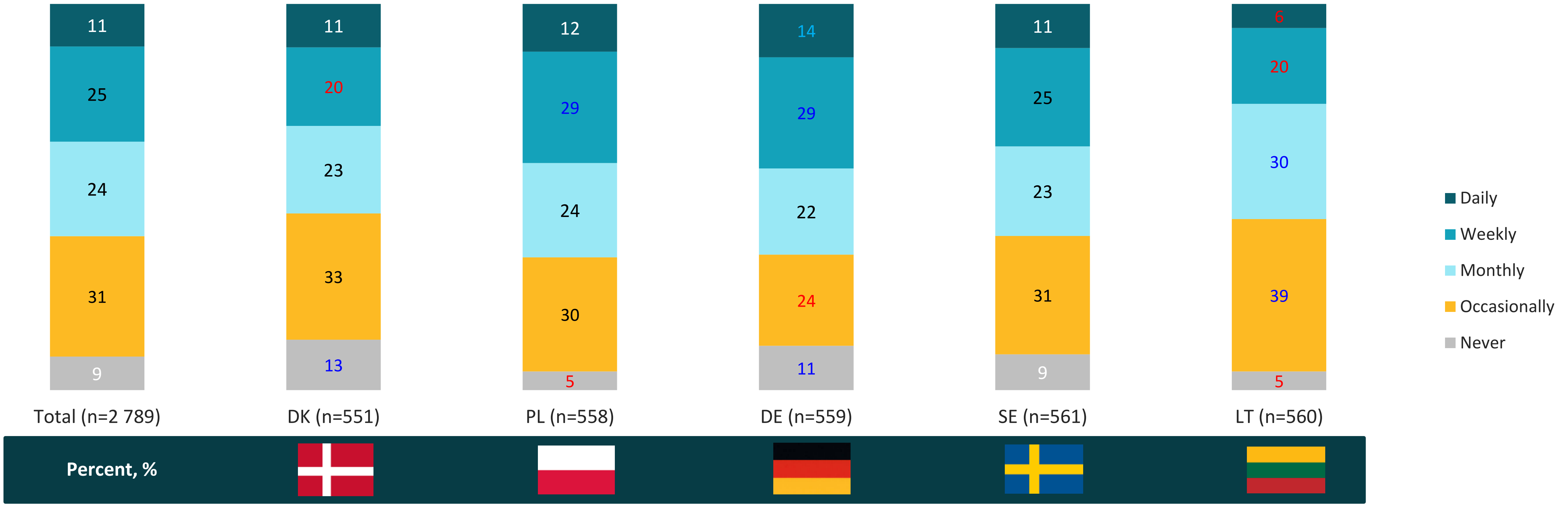
Q18_1. How often have you participated in nature-based wellness activities during the last years? Daily + Weekly + Monthly + Occasionally, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Forest-Based Activities (e.g., forest bathing, nature walks, hiking)



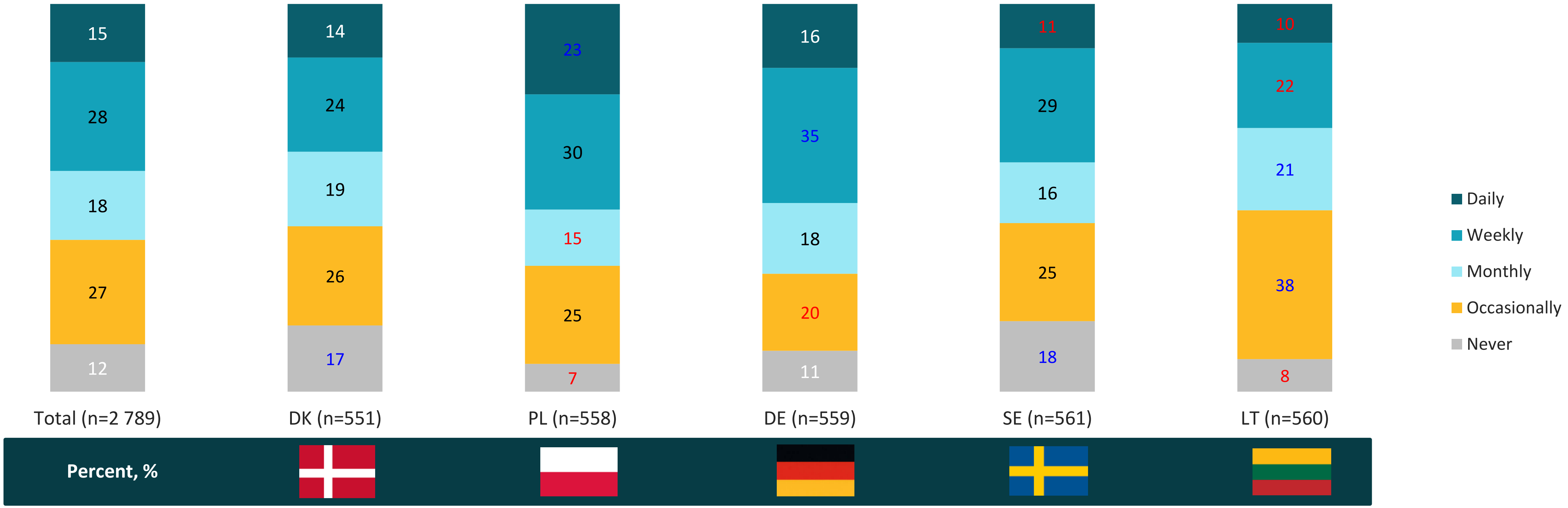
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Outdoor Sports and Physical Activities (e.g., cycling, running, Nordic walking, outdoor fitness)



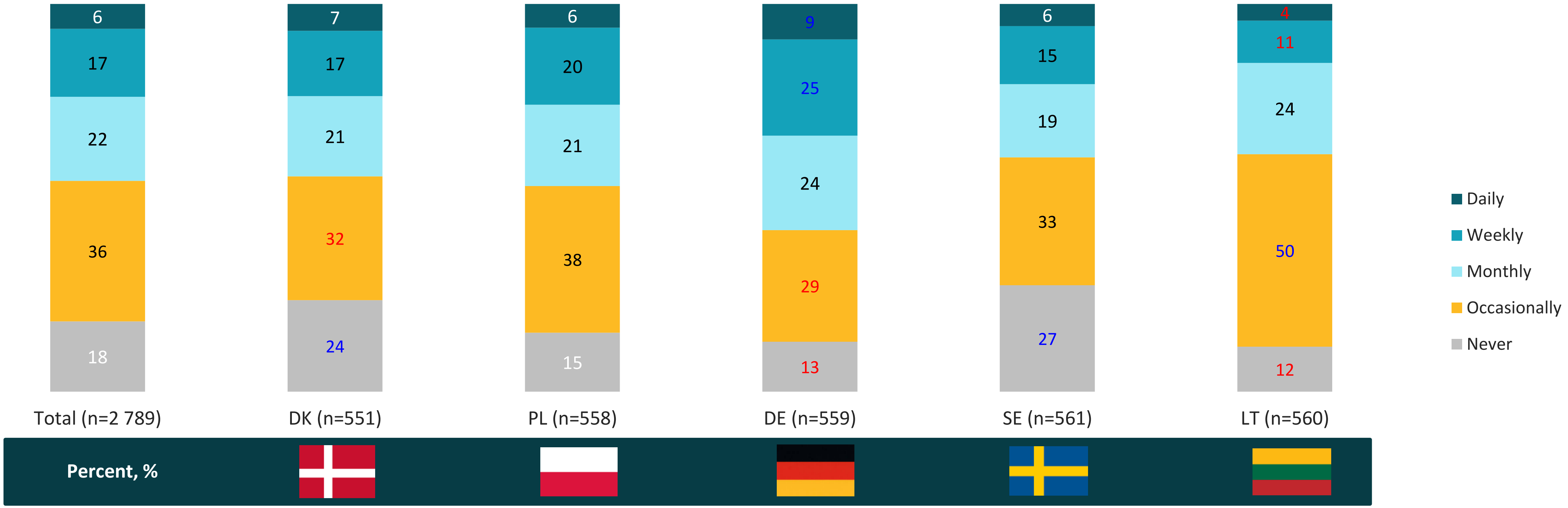
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Water-based Activities (e.g., swimming, thalassotherapy, thermal/mineral springs)



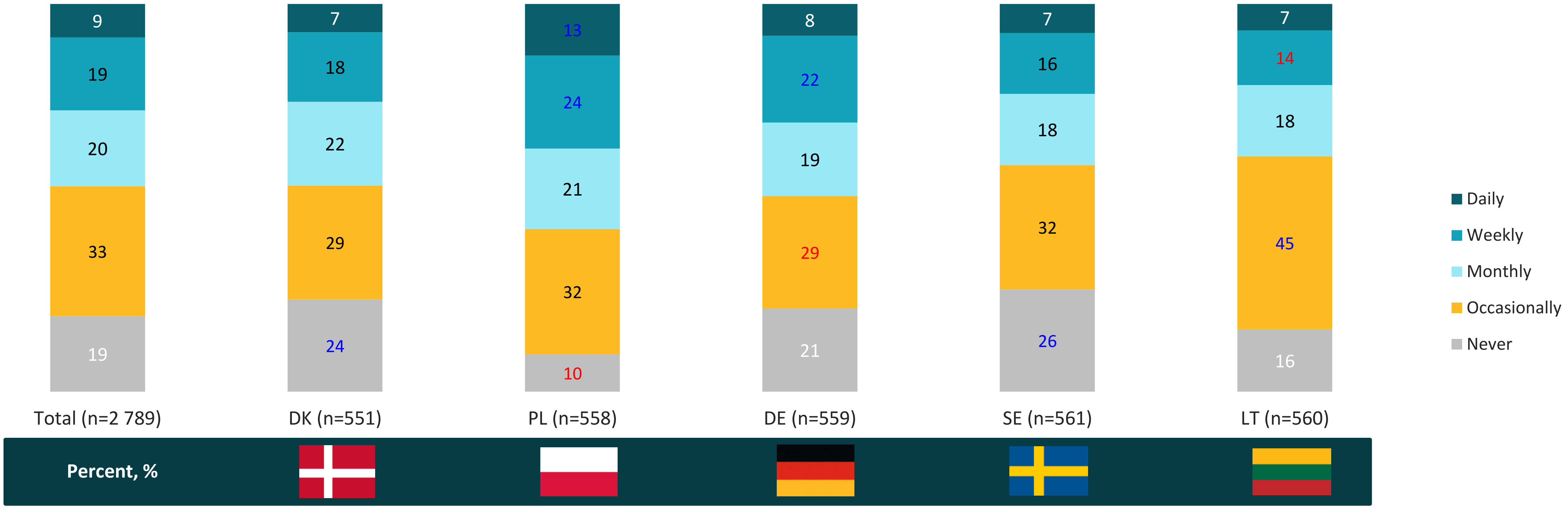
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Wildlife and Nature Connection Experiences (e.g., birdwatching, silence therapy)



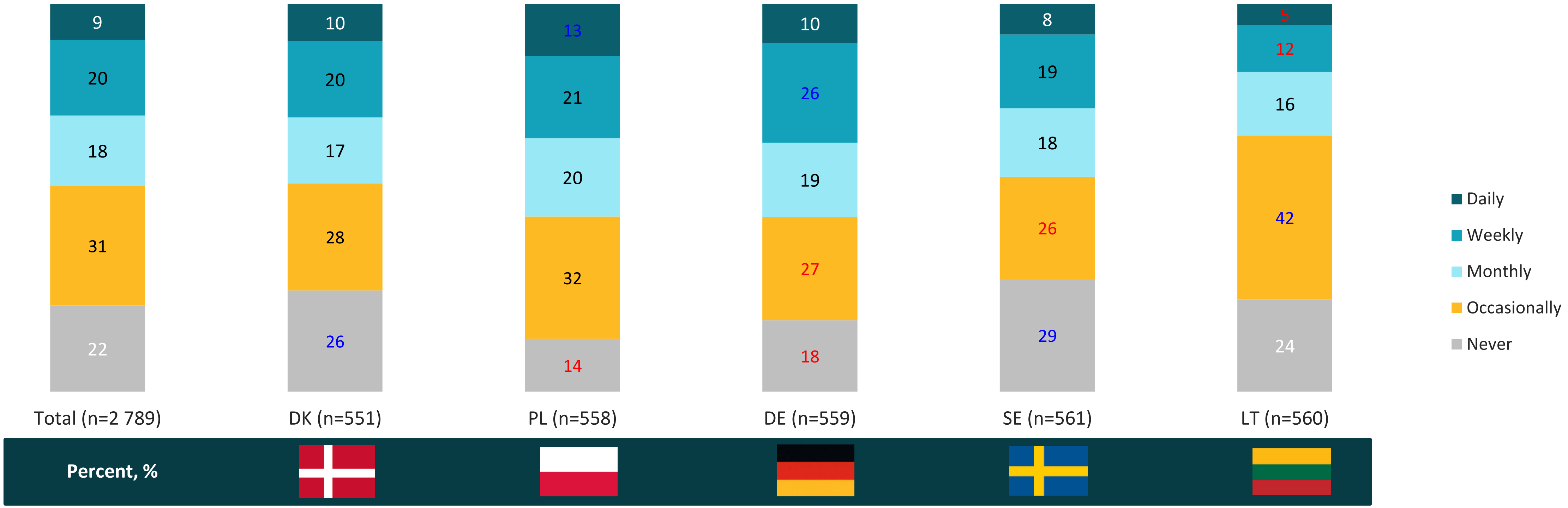
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Mindfulness and Relaxation in Nature (e.g., yoga, meditation, breathing exercises in natural settings)



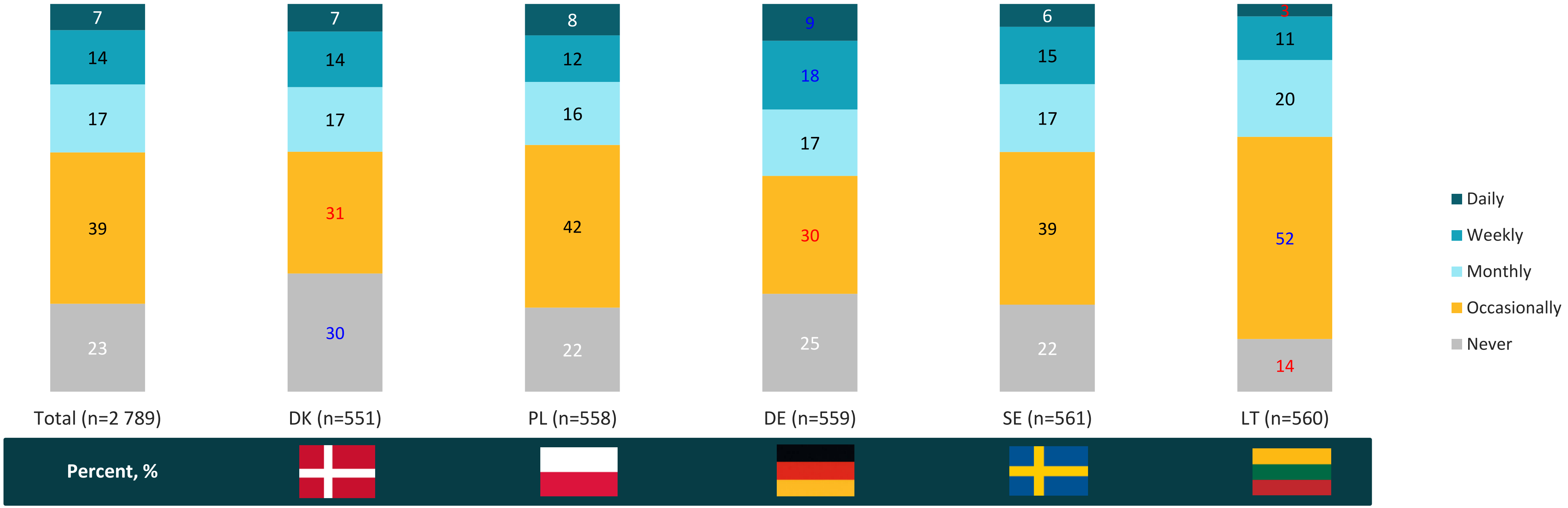
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Seasonal Wellness Activities (e.g., ice swimming, berry picking, sauna rituals, hot spring bathing, sand therapy)



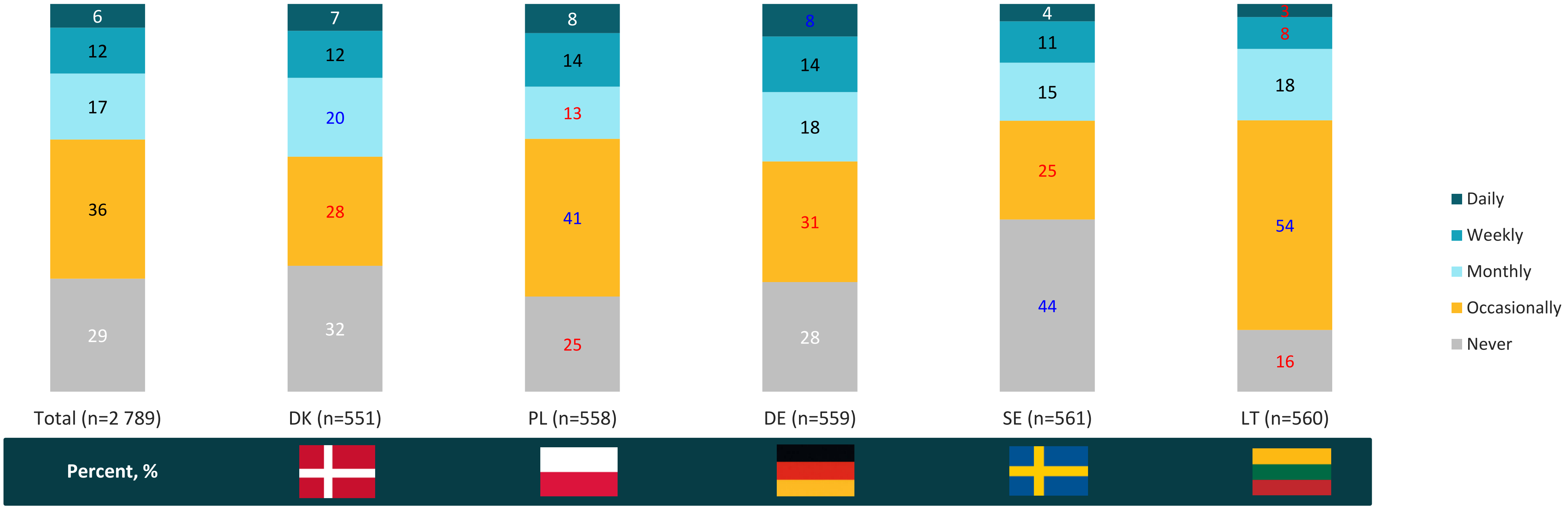
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Eco-Spa and Natural Treatments (e.g., mud therapy, salt therapy, herbal baths, wellness retreats)



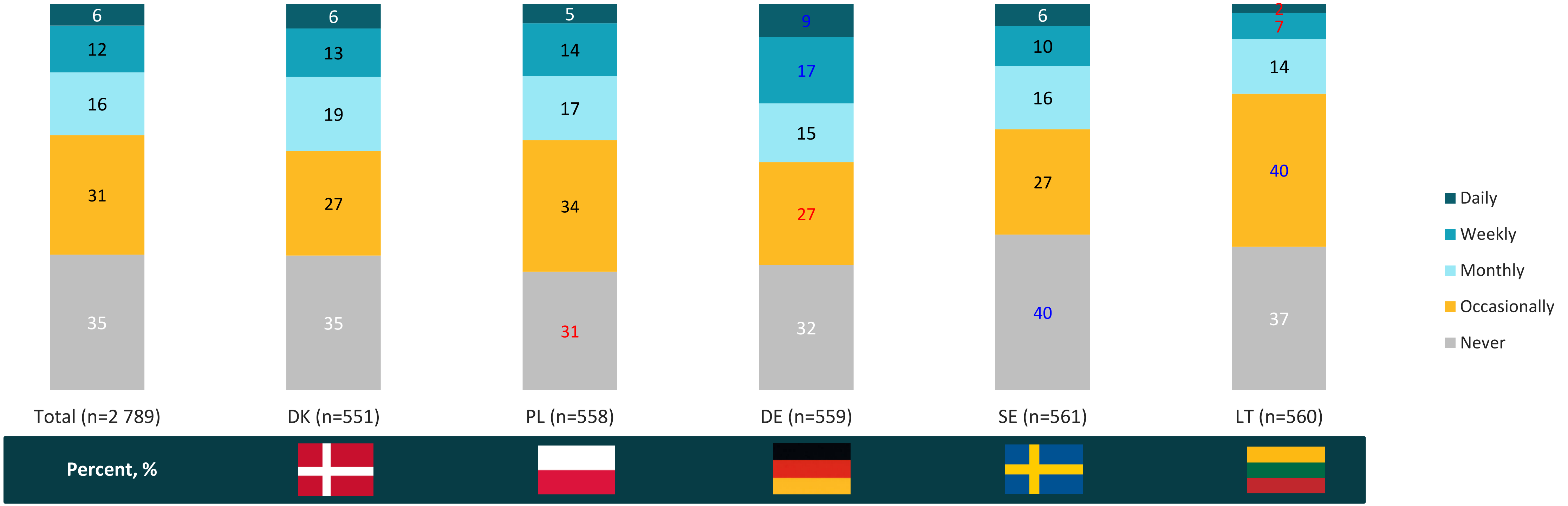
Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Activities during the Last Year:

Wellness Retreats (e.g., herbal medicine workshops, organic food experiences)



Q18_1. How often have you participated in nature-based wellness activities during the last years?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Planning Activities in the Near Future

Percent, %

	Total (n=2 789)	DK (n=551)	PL (n=558)	DE (n=559)	SE (n=561)	LT (n=560)
Forest-based activities (e.g., forest bathing, nature walks, hiking)	57	50	63	53	58	58
Outdoor sports and physical activities (e.g., cycling, running, Nordic walking, outdoor fitness)	54	48	65	56	51	52
Water-based activities (e.g., swimming, thalassotherapy, thermal/mineral springs)	45	39	49	55	39	45
Wildlife and nature connection experiences (e.g., birdwatching, silence therapy)	43	42	55	43	37	38
Mindfulness and relaxation in nature (e.g., yoga, meditation, breathing exercises in natural settings)	41	41	55	44	35	32
Seasonal wellness activities (e.g., ice swimming, berry picking, sauna rituals, hot spring bathing, sand therapy)	40	37	39	36	45	40
Eco-spa and natural treatments (e.g., mud therapy, salt therapy, herbal baths, wellness retreats)	34	33	38	33	26	39
Wellness retreats (e.g., herbal medicine workshops, organic food experiences)	30	34	33	34	24	23

Q18_2. Do you plan to do these activities in the near future? YES, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Attitudes Towards Sustainable Nature-Based Wellness Tourism

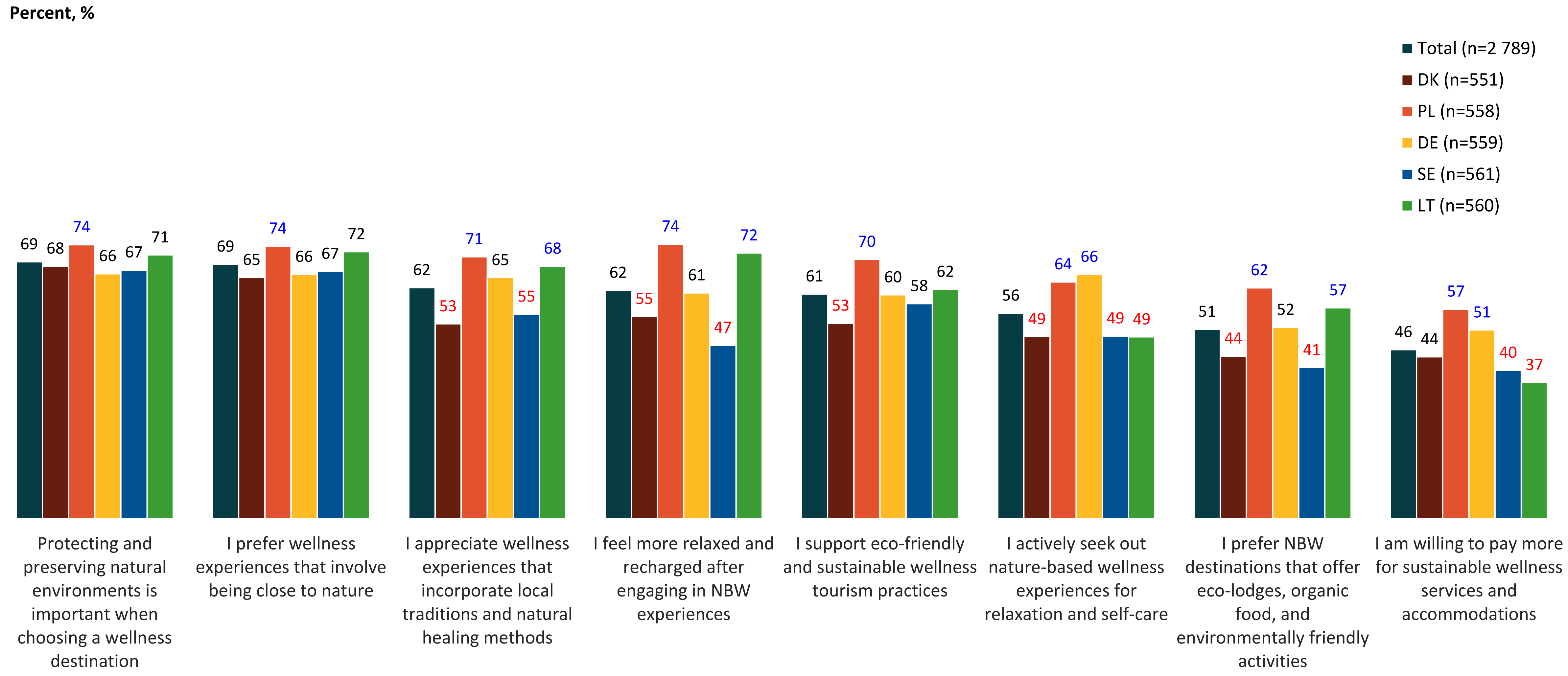
Attitudes Toward Sustainable Nature-Based Wellness Tourism: Top 2

Q19. Please, evaluate your attitudes toward sustainable nature-based wellness (N-B-Well) tourism: 5 - strongly agree, 1 – strongly disagree.

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Attitudes Toward Sustainable Nature-Based Wellness Tourism: Top 2

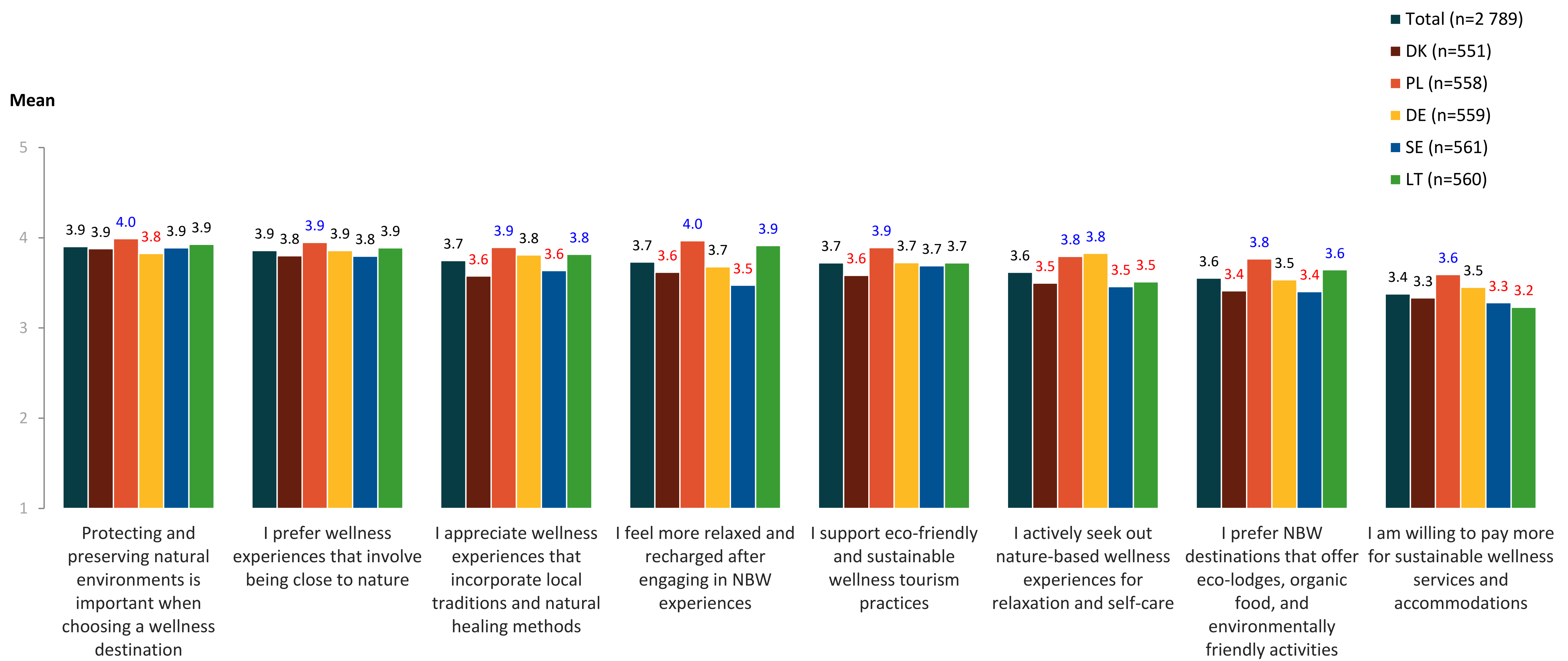


Q19. Please, evaluate your attitudes toward sustainable nature-based wellness (N-B-Well) tourism: 5 - strongly agree, 1 – strongly disagree.

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Attitudes Toward Sustainable Nature-Based Wellness Tourism: Mean

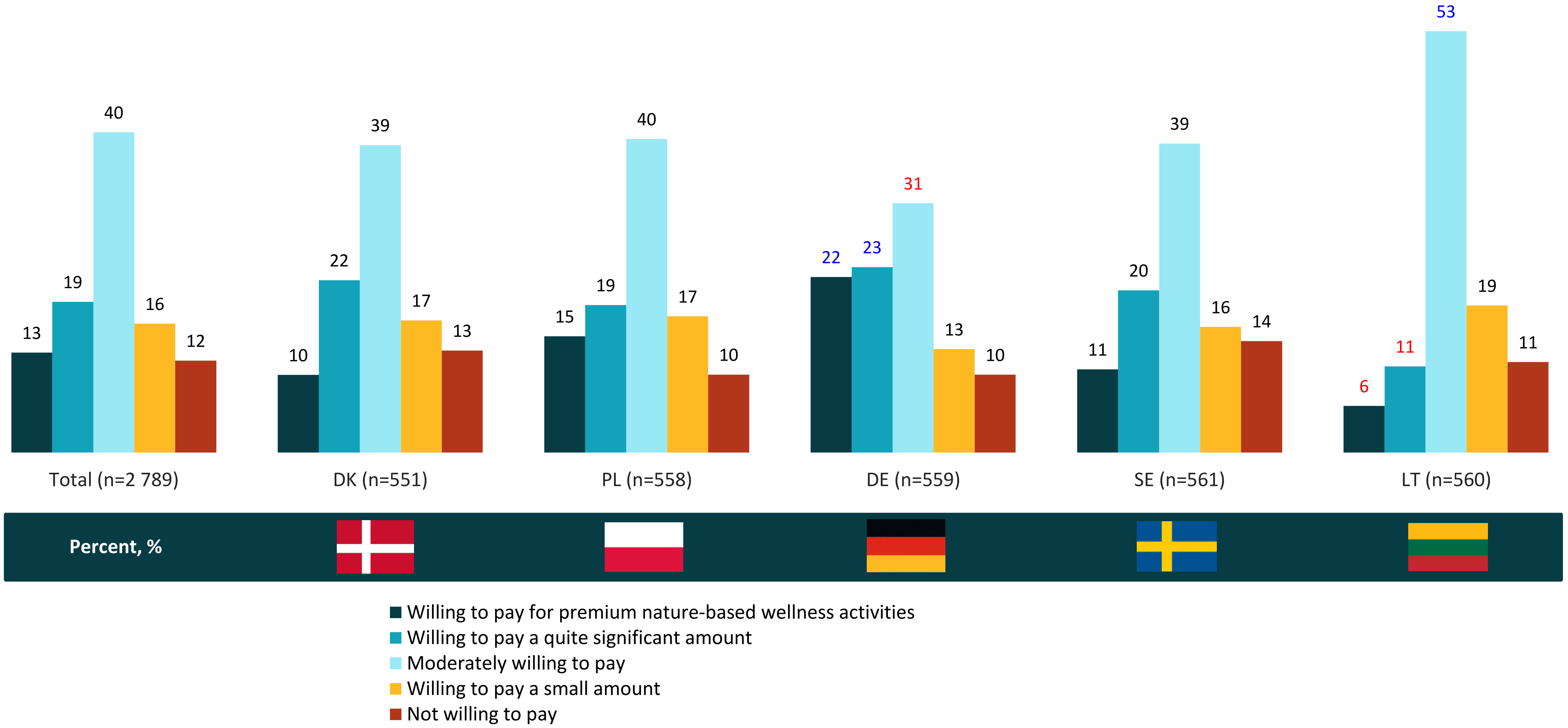


Q19. Please, evaluate your attitudes toward sustainable nature-based wellness (N-B-Well) tourism: 5 - strongly agree, 1 – strongly disagree.

Sample: All respondents - sorted by total mean

Statistically significantly higher: x,x lower: x,x than in the total sample

Willingness to Invest in Nature-Based Wellness Activities

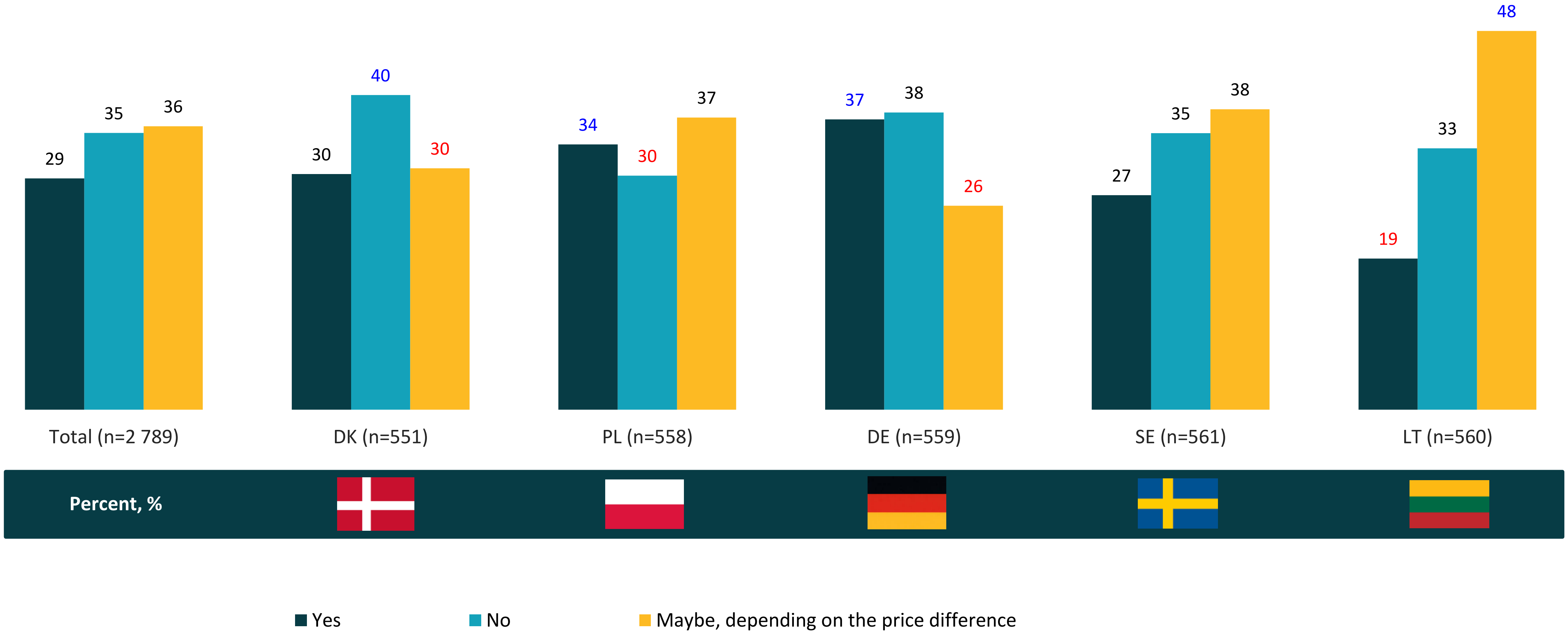


Q20. How much are you willing to invest in nature-based wellness activities during your travels?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Willingness to Pay Extra for Eco-Certified Nature-Based Wellness Experiences

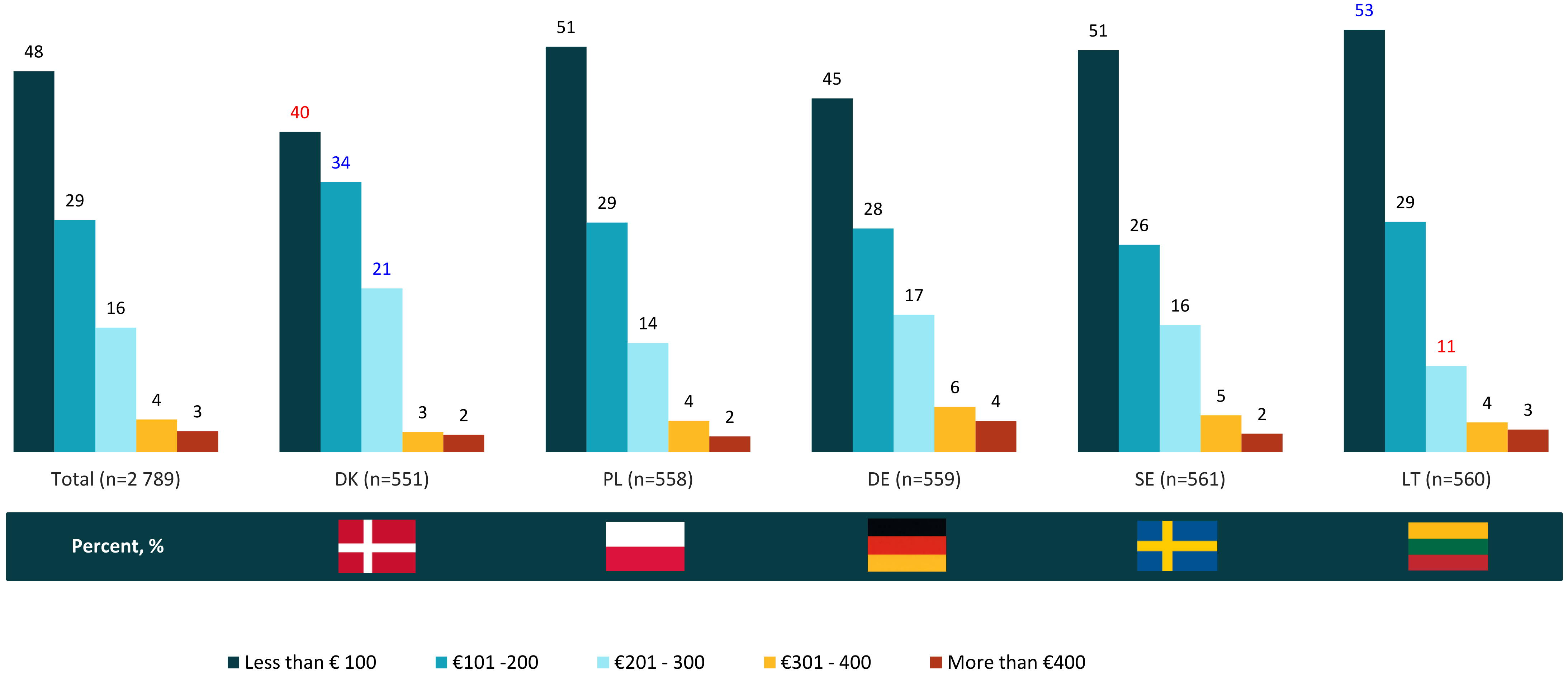


Q21. Would you be willing to pay extra for eco-certified nature-based wellness experiences?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Average Daily Spending on The Nature-Based Wellness Destination, Encompassing Accommodations, Meals and Other Services



Q22. What is your average daily spending on the nature-based wellness destination, encompassing accommodations, meals, and other services?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Information Channels

Percent, %

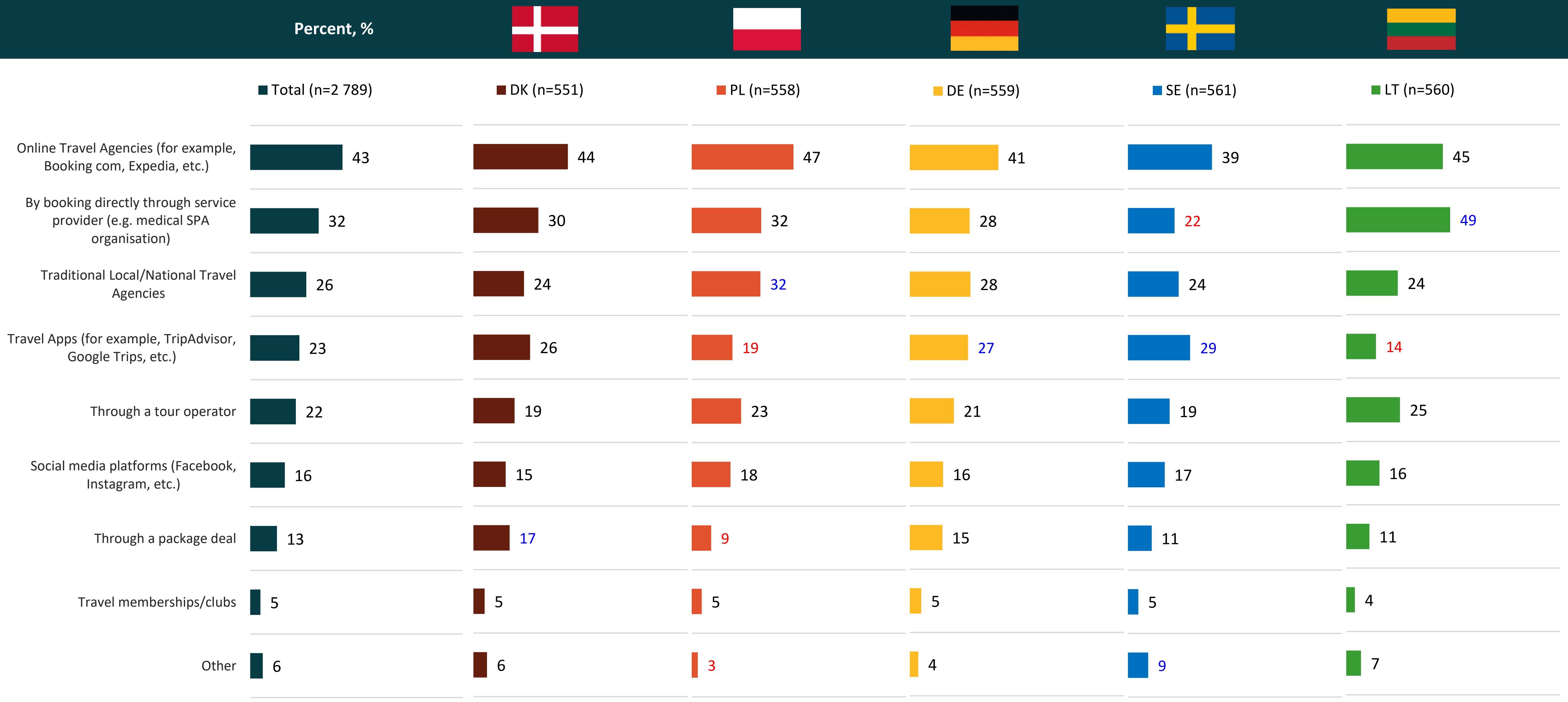
	Total (n=2 789)	DK (n=551)	PL (n=558)	DE (n=559)	SE (n=561)	LT (n=560)
Recommendations from friends, family, or acquaintances	48	46	45	47	52	50
Social Media – Facebook	33	29	34	21	33	49
Official Destination/NBW service organisation Websites	31	24	41	29	27	32
Consumers reviews on websites/blogs	28	25	34	18	28	36
Television	21	21	18	25	16	23
Travel Agencies	20	21	20	20	16	23
Social Media – Instagram	19	18	16	18	26	16
Social Media – Youtube	18	17	19	19	22	15
Recommendations from doctors	17	14	18	22	11	17
Print Magazines/ Brochures	13	13	9	17	15	12
Social Media – TicTok and other	11	12	12	10	12	9
Mobile Apps	10	12	11	7	13	8
Books	9	7	10	10	12	6
Shared content of Influencers	6	6	7	5	6	5
Social Media – Twitter/X	5	7	6	5	5	2
Trade Shows	5	7	2	8	5	5
Other	4	8	1	3	5	3

Q23. Where do you obtain information about destinations, which prefer nature-based wellness tourism products and services? (could be several choices)

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

N-B-Well Trip Booking Places



Q24. How do you book your N-B-Well trip? I usually book my trip through:(could be several choices)

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Key Motivators for N-B-Well Tourism

N-B-Well Activities Motivators

Percent, %

	Total (n=2 789)	DK (n=551)	PL (n=558)	DE (n=559)	SE (n=561)	LT (n=560)
To take rest and relax	70	66	73	70	69	73
To spend more time outdoors and enjoy the beauty of nature	68	62	73	65	67	72
To recharge energy	67	62	71	66	66	68
To enhance mood and emotional well-being	66	62	73	64	63	70
To enhance overall health	66	63	72	64	62	69
To find a sense of calm and reduce stress levels	66	59	72	65	64	67
To get away from everyday life routine	65	60	69	61	64	71
To take a break from routine and focus on self-care	64	60	70	63	62	67
To improve physical health	64	59	70	64	59	66
To discover new places and things	63	57	66	60	63	67
To balance mental and emotional health	63	58	72	62	59	62
To enjoy time with family or friends	62	55	65	59	60	69
To refresh mind and gain inspiration	62	56	67	58	61	64
To explore natural landscapes (grassland, forest, etc.)	61	54	71	62	57	60
To reconnect with nature and its calming influence	60	53	66	62	57	60
To escape from urban life and technology	59	52	68	57	56	63
To disconnect from work-related pressures	59	54	64	58	54	65
To feel more connected to the natural world and its rhythms	57	51	66	53	53	64
To explore harmony between nature and culture	54	49	61	58	51	53
To explore local cuisine	51	49	58	55	46	48
To increase my knowledge and experience about wellness benefit	51	43	64	49	48	52
To support conservation and sustainable tourism	49	45	60	52	45	43
To learn about the traditional or indigenous wellness practices in nature	49	40	56	49	46	51
To practice mindfulness and meditation in a natural environment	46	40	55	52	44	42

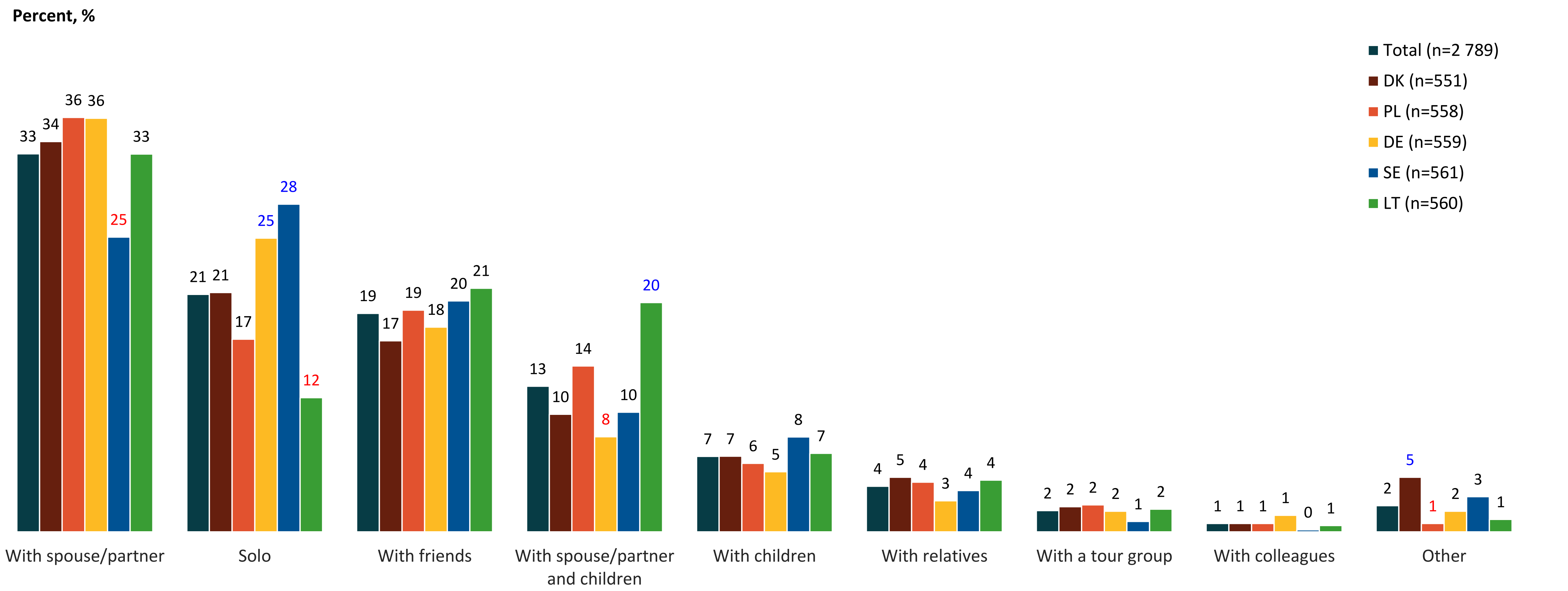
Q25. What motivates you to engage participate in nature-based wellness activities? Always + Often, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Nature-Based Wellness Tourism Service Options

N-B-Well Travel Companions

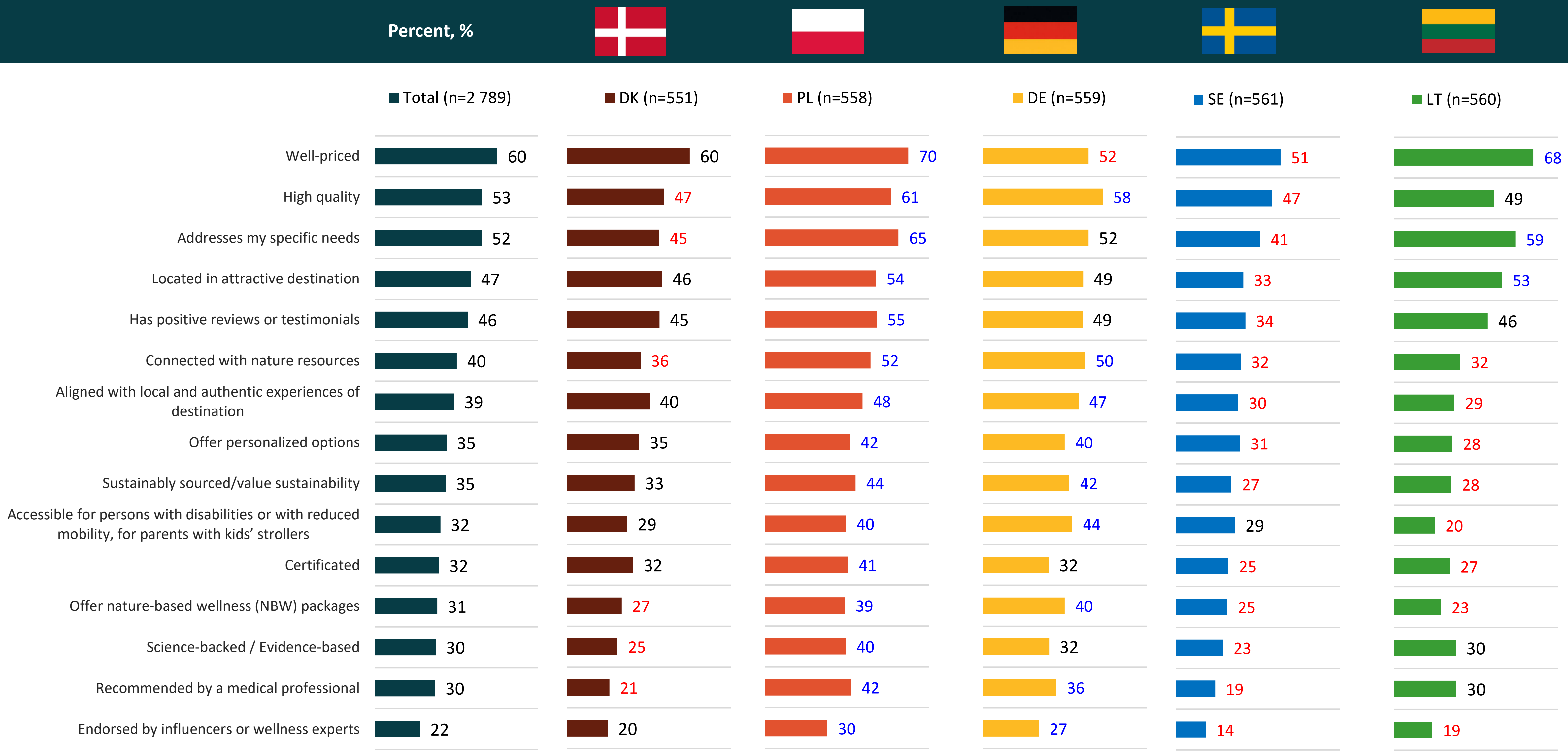


Q26. With whom do you most frequently travel to N-B-Well destination/organisation?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Important Factors When Selecting a Nature-Based Wellness Products or Services

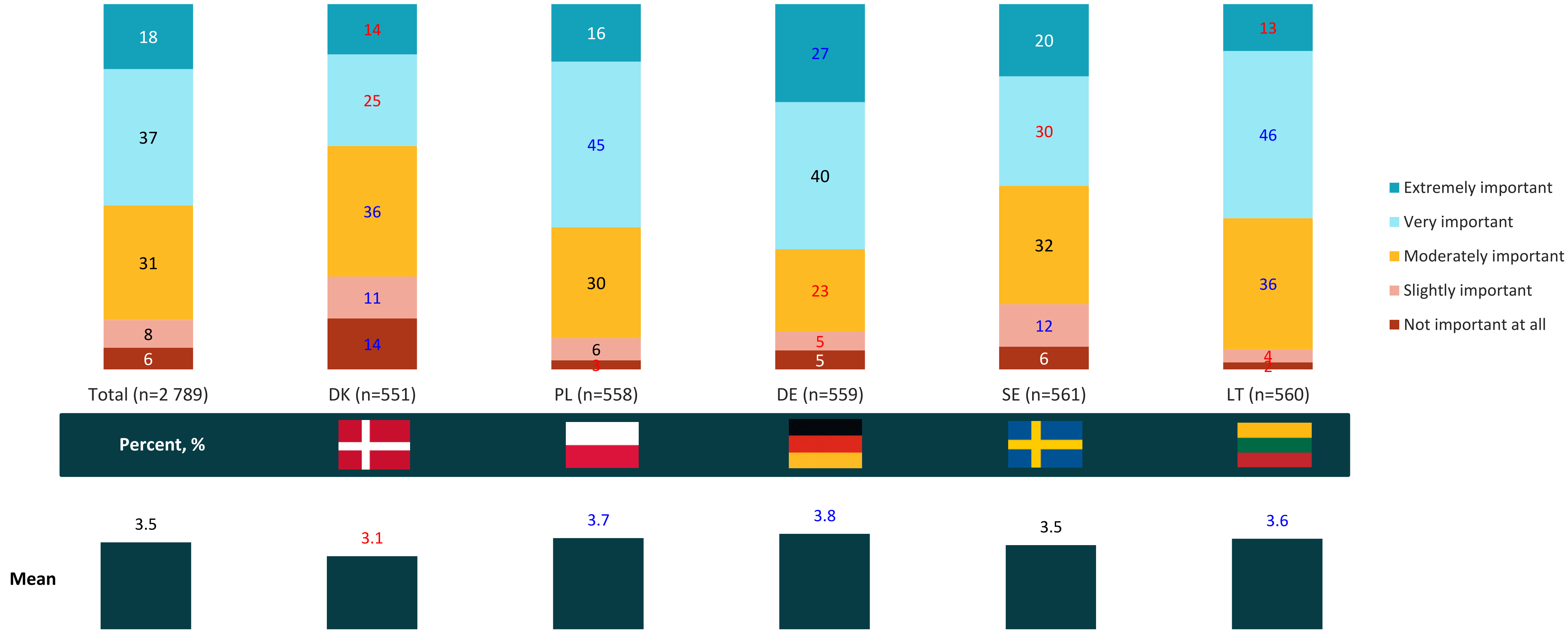


Q27. When selecting a nature-based wellness products or services, which of the following factors are most important for you? Very important, %

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

The Importance of Designated Thematic Routes when Choosing a Wellness Destination

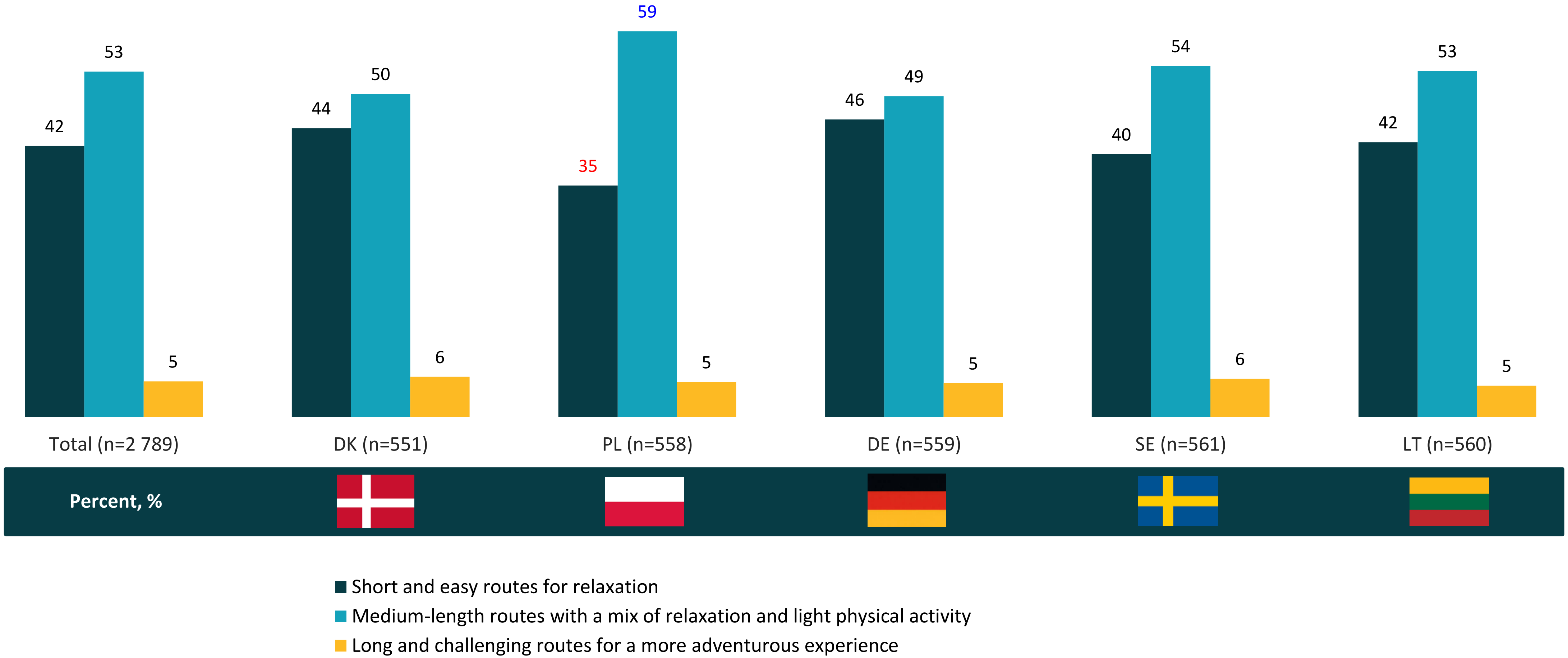


Q28. When choosing a nature-based wellness destination, how important are designated thematic routes (e.g. for physical health recovery, for reducing stress and anxiety, for emotional regulation, etc.)?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Feeling About the Length and Difficulty Of N-B-Well Thematic Routes



Q30. How do you feel about the length and difficulty of nature-based wellness thematic routes?

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

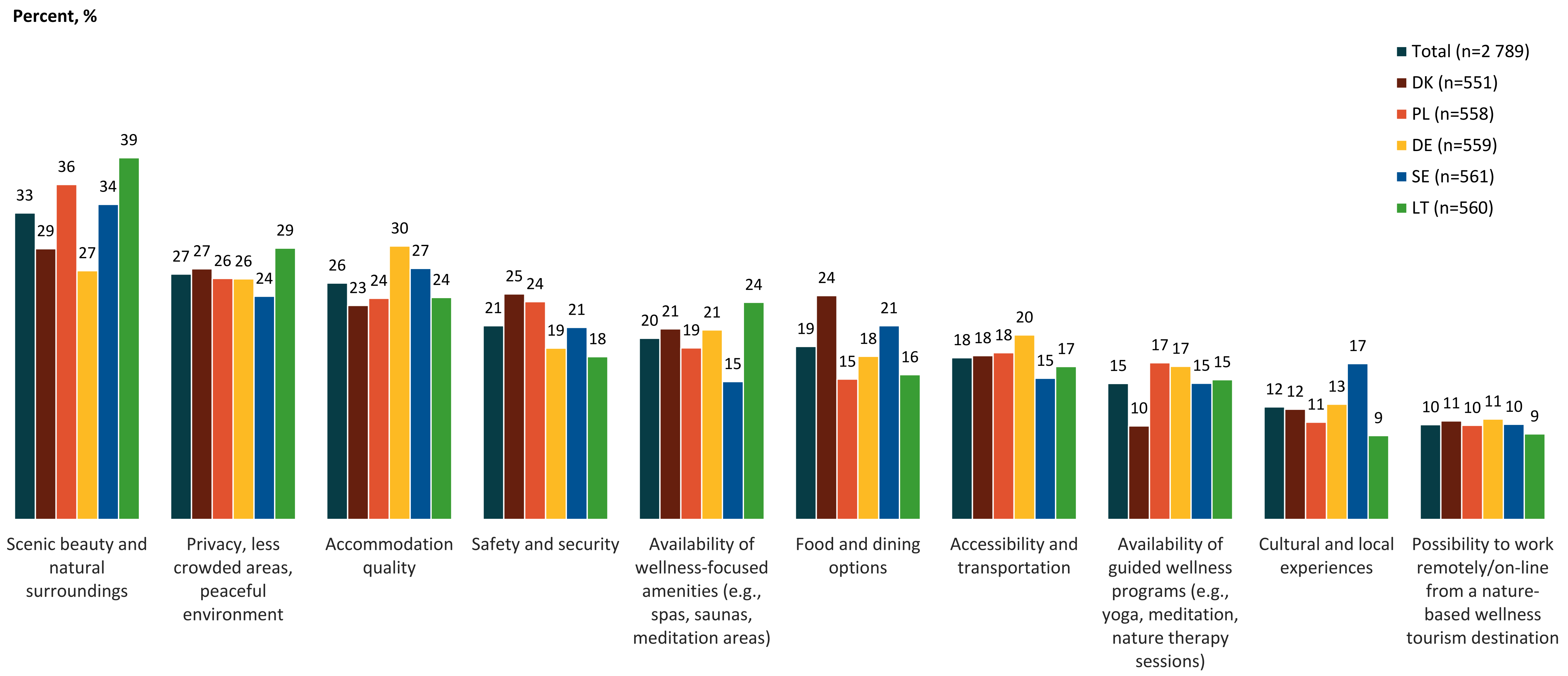
Important Aspects when Choosing a N-B-Well Route: Top 2

Q31. How important are the following aspects when choosing a nature-based wellness route? Please, rate from 1 to 10, where 10 – most important and 1 – least important. Top2, %

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Important Aspects when Choosing a N-B-Well Route: Top 2

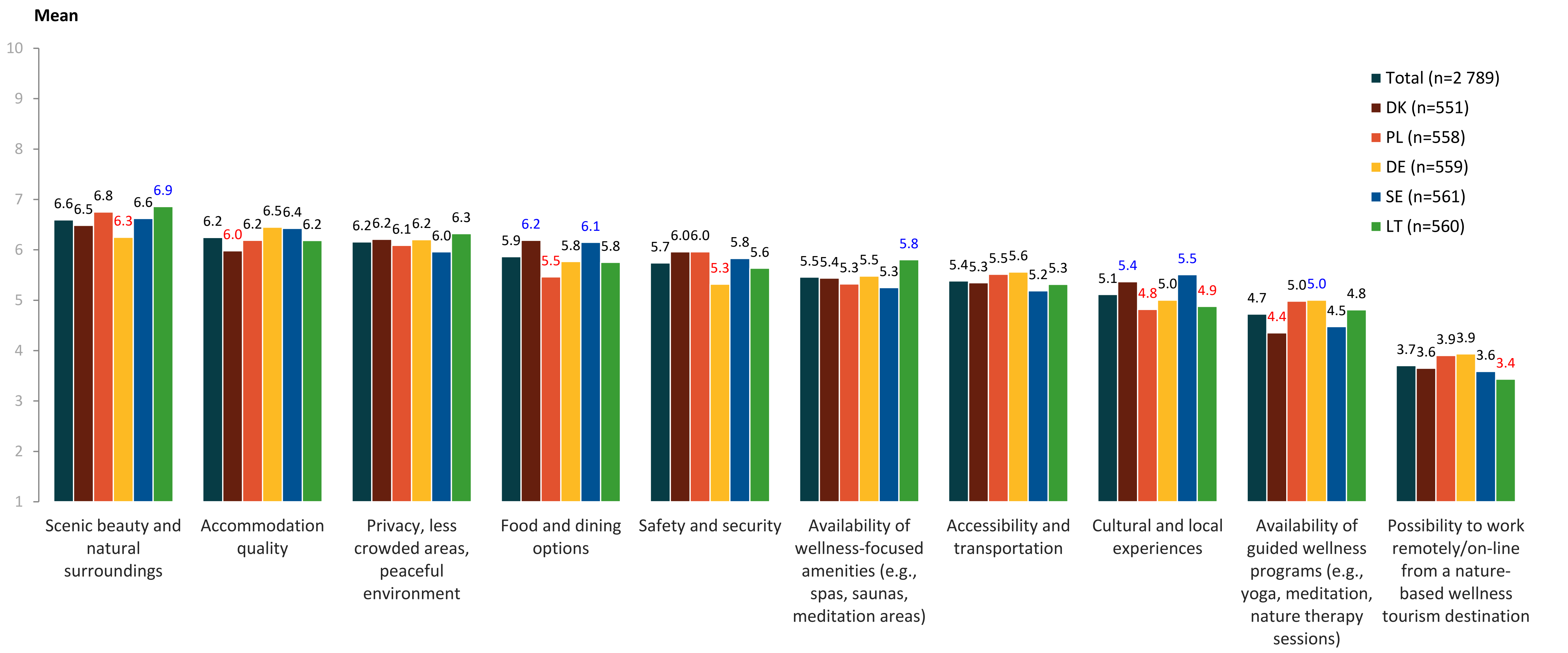


Q31. How important are the following aspects when choosing a nature-based wellness route? Please, rate from 1 to 10, where 10 – most important and 1 – least important. Top2, %

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Important Aspects when Choosing a N-B-Well Route: Mean



Q31. How important are the following aspects when choosing a nature-based wellness route? Please, rate from 1 to 10, where 10 – most important and 1 – least important.

Sample: All respondents - sorted by total mean

Statistically significantly higher: x,x lower: x,x than in the total sample

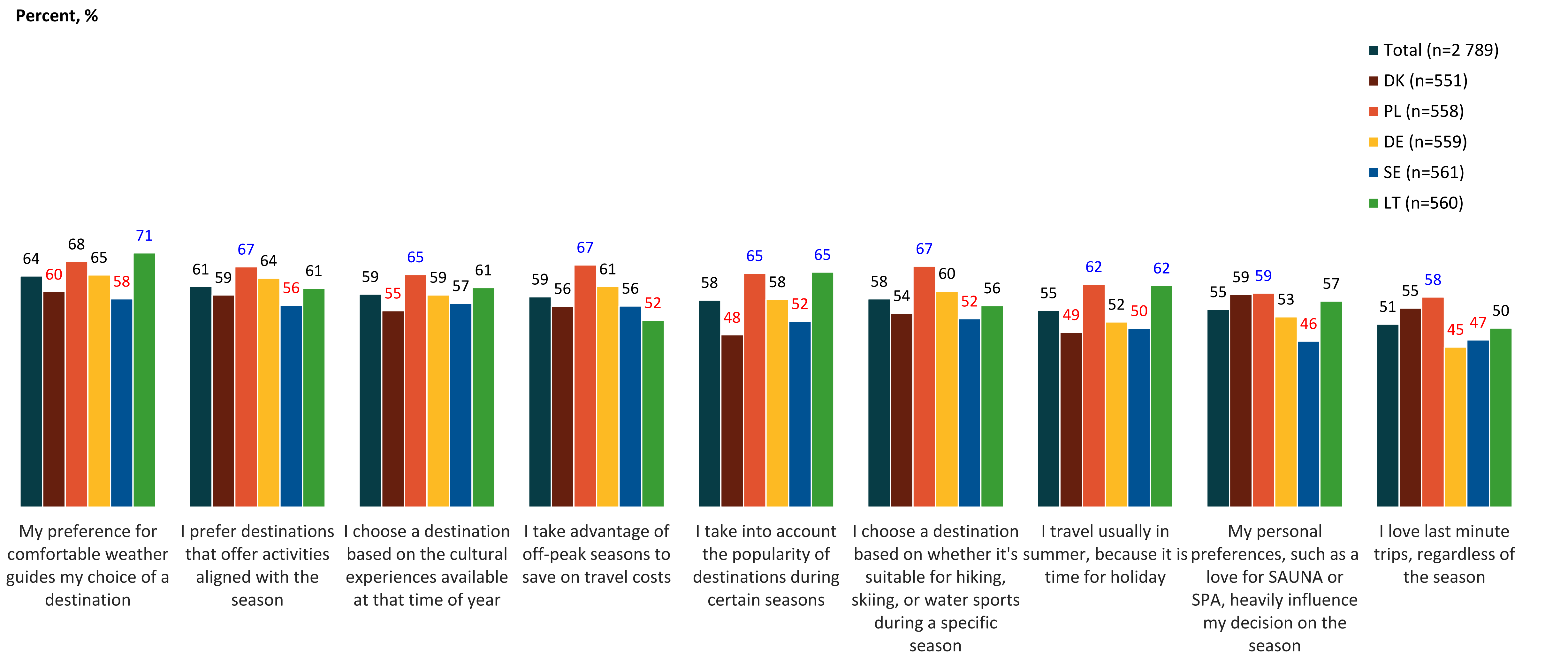
Season Impact on Choice of a N-B-Well Destination: Top 2

Q32. How does the season impact your choice of a nature-based wellness destination?: 5 - strongly agree, 1 – strongly disagree.

Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

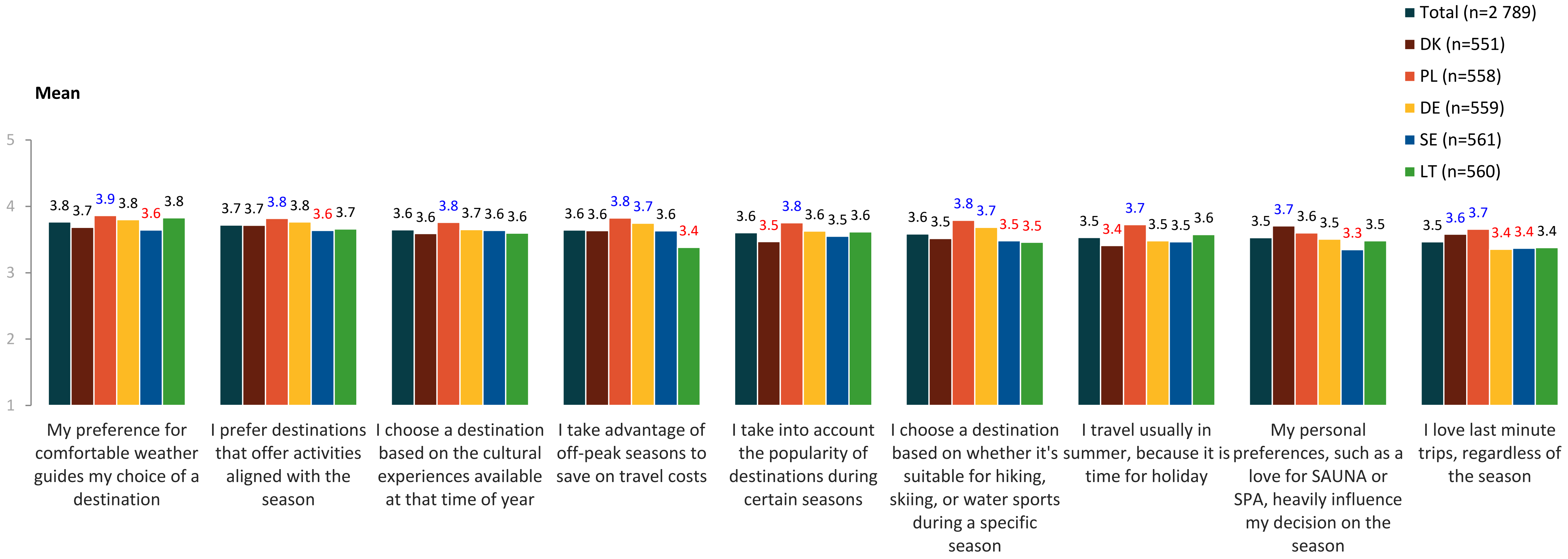
Season Impact on Choice of a N-B-Well Destination: Top 2



Q32. How does the season impact your choice of a nature-based wellness destination?: 5 - strongly agree, 1 – strongly disagree.
Sample: All respondents - sorted by total Top2

Statistically significantly higher: xx lower: xx than in the total sample

Season Impact on Choice of a N-B-Well Destination: Mean

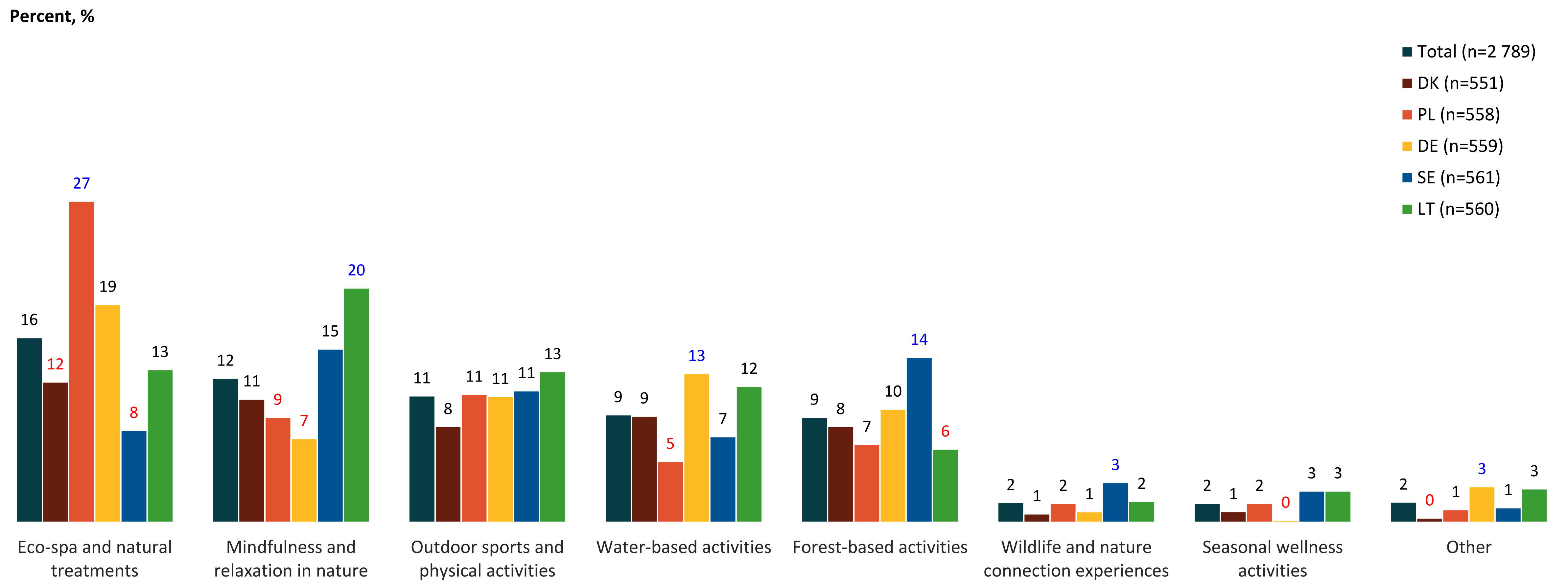


Q32. How does the season impact your choice of a nature-based wellness destination?: 5 - strongly agree, 1 – strongly disagree.

Sample: All respondents - sorted by total Top2

Statistically significantly higher: x,x lower: x,x than in the total sample

Favorite N-B-Well Services in the Country of Residence

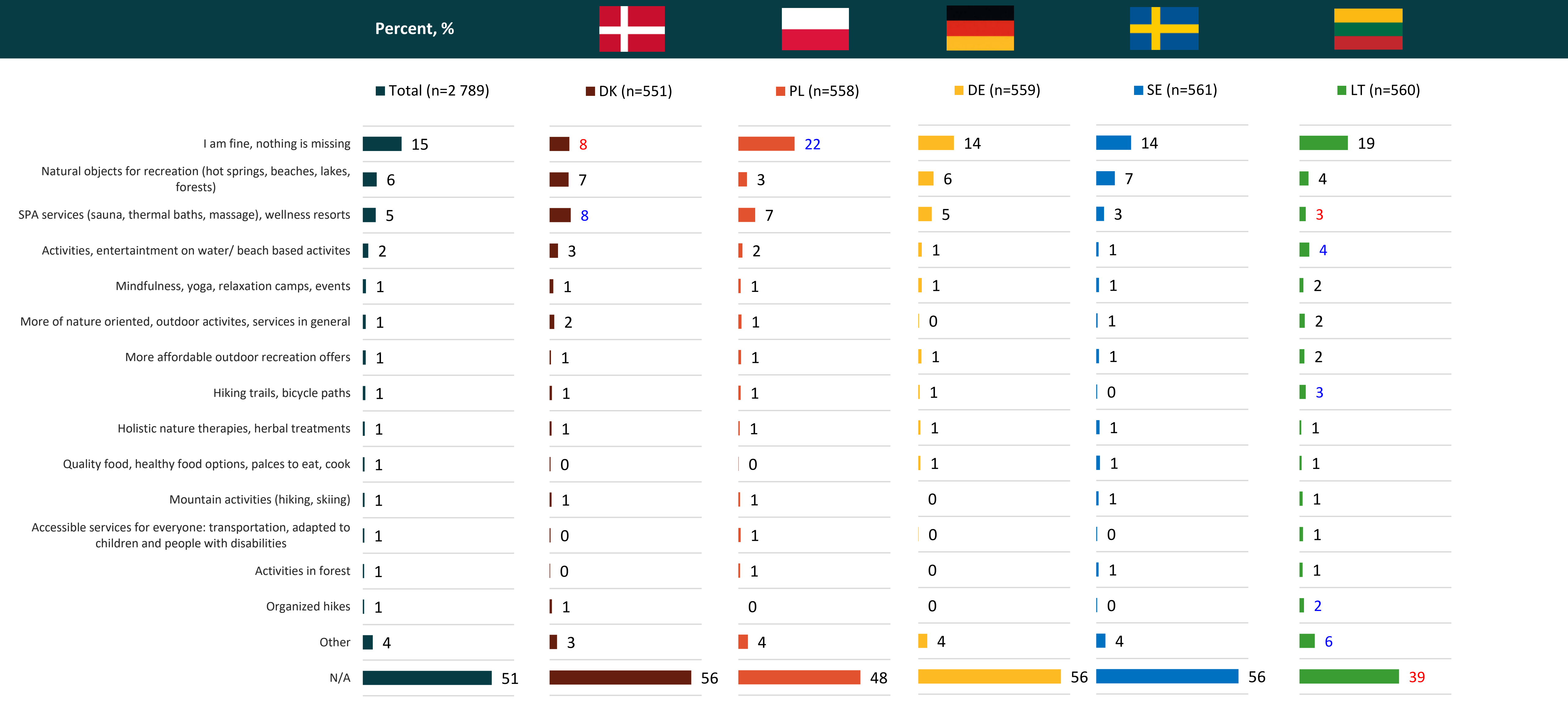


Q33. What nature-based wellness services you like most in your country? Spontaneous answers

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

Wanting N-B-Well Services in the Country of Residence



Q34. What nature-based wellness services do you miss in your country? Spontaneous answers

Sample: All respondents

Statistically significantly higher: xx lower: xx than in the total sample

NATURE-BASED WELLNESS TOURISM

Interreg South Baltic

Co-funded by the European Union

RKIT

Klaipėdos universitetas

Secondary Data Report

Information about Secondary Data Report

Overview

The secondary data is providing **general information** about tourism market in **Denmark, Germany, Poland, Lithuania and Sweden** based on available national and regional data. The secondary data were provided by the representatives from the Project partners. The analysed data is collected from the sources, provided at the end of the report.

List of representatives of the countries who lead in providing data

Diana Šaparnienė, Lithuania and Sweden, Author of the Secondary Data Report
John Wallin Pedersen, Denmark
Berit Wader, Germany
Maciej Nyka, Anna Dobaczewska, Poland

NATURE-BASED WELLNESS TOURISM

Interreg South Baltic

Co-funded by the European Union

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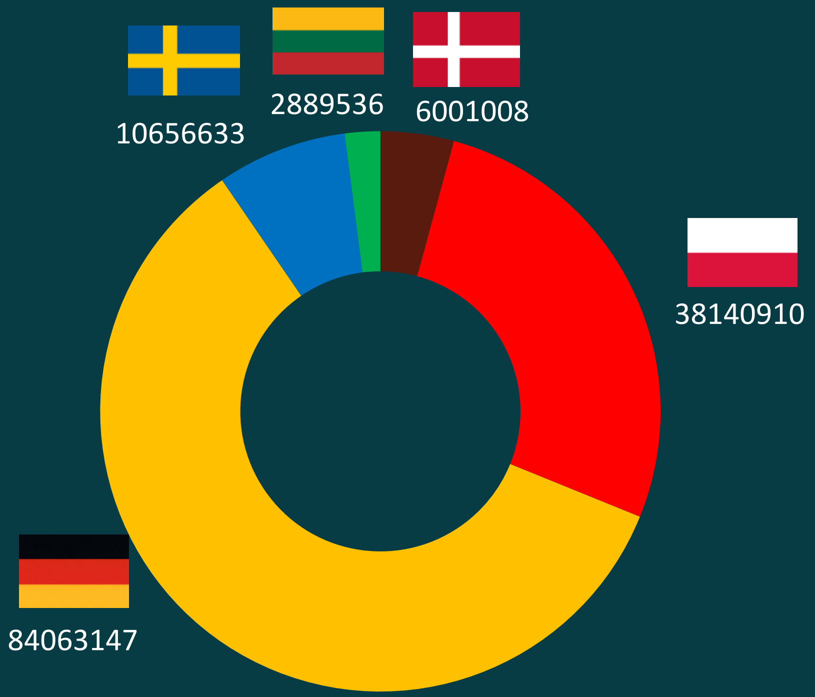
Countries Profile

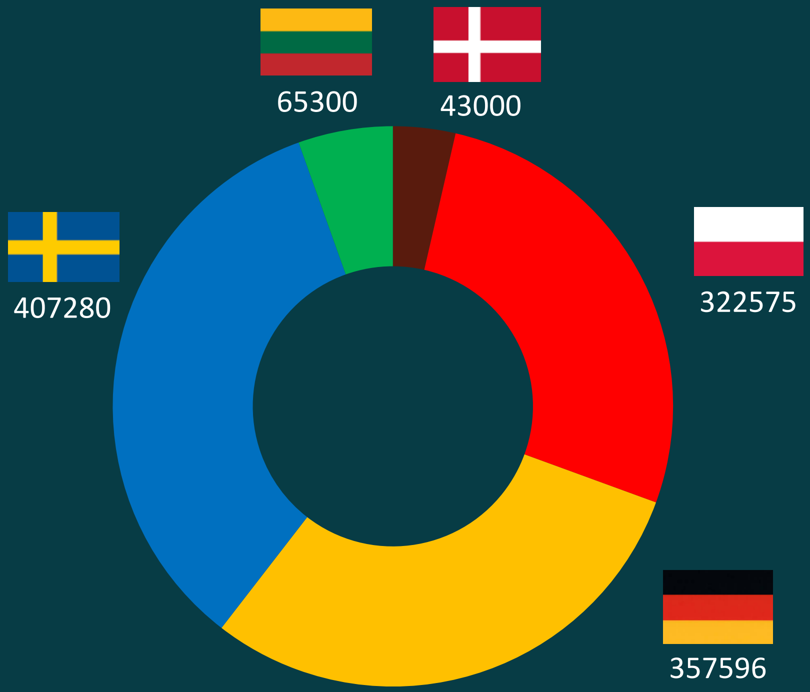
Population and country area

Analysed countries profile provides a comparative overview of five European countries: Denmark, Germany, Poland, Lithuania and Sweden. Each of these nations offers unique characteristics in terms of population size (2025 data, https://www.worldometers.info), territorial area, and tourism potential.

POPULATION (residents)



COUNTRY AREA (km²)



Denmark

Denmark is a relatively small Nordic country with a population of around 6 million and an area of 43.000 km². Despite its size, Denmark is a strong tourism destination due to its high quality of life, vibrant cities and scenic coastlines. Copenhagen, the capital, is a major draw for its design, culture, and sustainability initiatives. Denmark offers island tourism, attracts visitors interested in cycling, gastronomy, Viking history and family-friendly attractions.

Population: 6001008
Geographic area (km²): 43000

Germany

Germany is one of the biggest countries in the EU with more than 84 million people and an area of 357.596 km². It is one of Europe’s top tourist destinations, known for its diverse tourism offerings: from cultural cities to historic castles, mountain adventures in the Alps and Baltic coast resorts. Germany is also strong in health and wellness tourism, with numerous spa towns, and hosts major global events and festivals. It attracts both business and leisure travelers year-round.

Population: 84063107
Geographic area (km²): 357596

Poland

Population: 38140910
Geographic area (km²): 322575

Poland has a population of around 38 million people and an area 322.575 km², making it one of the largest and most dynamic countries in the EU. Poland's tourism sector blends historical cities like Kraków, Warsaw, and Gdańsk with natural attractions such as the Tatra Mountains, Masurian Lake District, Białowieża Forests – one of the last and the largest remaining parts of the immense primeval forest, and Baltic Sea coastline. Poland also draws visitors with its cultural heritage, well preserved natural environment with UNESCO World Heritage Sites, religious tourism and affordable travel options.

Lithuania

Lithuania is the southernmost Baltic state, with a population of around 2.89 million and a territory of 65.300 km². While smaller than its neighbours, Lithuania offers rich tourism experiences including UNESCO sites like Vilnius Old Town and the Curonian Spit. Its spa towns, natural parks and rural tourism are especially popular for domestic and international travelers. Lithuania is growing in popularity as a destination for eco-tourism, culture and short city breaks.

Population: 2889536
Geographic area (km²): 65300

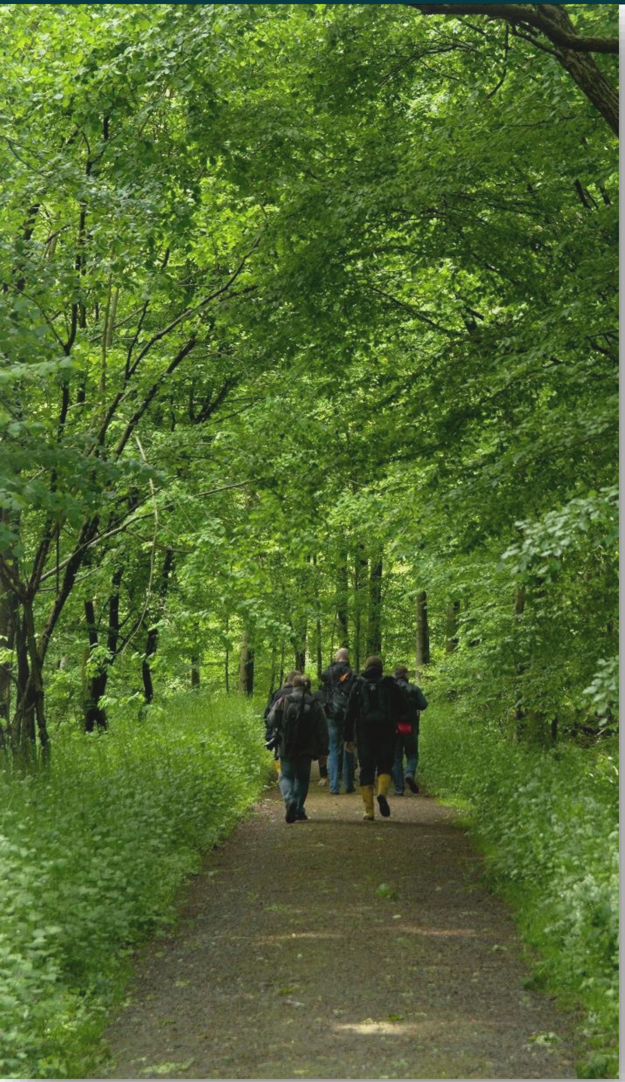
Sweden

Population: 10656633
Geographic area (km²): 407280

Sweden is in Northern Europe, has a population of about 10.65 million and covers 407.280 km². It is known for its vast natural landscapes, including forests, lakes, and Arctic wilderness. Tourism in Sweden focuses on nature and adventure, wildlife safaris and hiking. Cities like Stockholm, Gothenburg and Malmö also offer strong cultural tourism. Sweden balances urban sophistication with a deep connection to nature and sustainable travel.

Tourism Market Size

Tourism's Economic Impact and Market Overview



Tourism plays a key role in the economies of Denmark, Germany, Poland, Lithuania and Sweden. In 2023 the share of travel and tourism's total contribution to GDP in **Germany was 11%, in Sweden - 7.1%, in Denmark – 6.5%, in Lithuania - 5.2%, in Poland - 4.1%** (EU 2023| Statista). According to the forecasts from the World Travel and Tourism Council (WTTC), the tourism sector contributed 9.1% to global GDP in 2023, marking a 23.2% increase from 2022 and nearing pre-pandemic levels. In past years the tourism and travel industry's growth are continued.

As for visitor numbers in 2024, **Germany's tourism sector generated €468.7 billion, Poland's PLN 144.5 billion (approx. €33.5 billion), Denmark's – approx. €20.6 billion, Sweden's – around €39.5 billion, and Lithuania's – about €1.6 billion.** Germany recorded the highest total number of overnight stays (5.9 per capita), while Denmark had the highest number of overnight stays relative to its population (10.8 per capita). The smallest number of overnight stays fixed in Lithuania (3.0 per capita). The smallest ratio of overnight stays to the country population fixed in Poland (2.6 per capita) (see Table 1).

Tourism Statistics and Key Visitor Markets

Country	Total number of overnight stays	Inbound tourists' number	The ratio of overnight stays to the country's population	Top countries by number of visitors	Top countries by number of Wellness Tourism visitors
DENMARK	65.0 mln	34.1 mln	10.8	Germany, Norway Netherlands	Germany, Norway, Sweden
GERMANY	496.1 mln	85.3 mln	5.9	Netherlands, Switzerland, USA	Denmark, Sweden, Austria, Switzerland, Poland
LITHUANIA	8.64 mln	3.1 mln	3.0	Poland, Germany, Latvia	Germany, Israel, Latvia
POLAND	97.6 mln	18.99 mln	2.6	Germany, Czech Republic, Slovakia	Germany, Czech Republic
SWEDEN	64.1 mln	16.8 mln	6.0	Germany, Norway, Denmark	Germany, Norway, USA

Table 1. The number of total overnight stays, in between – Inbound tourists' number per 2024 year, ratio of overnight stays to the country's population and top countries by the number of tourists

Tourism Statistics and Key Visitor Markets. Main distinctive features

- All countries in the South Baltic Sea region analyzed **are attractive to tourists from Germany**. For example, in Lithuania German travelers comprised approximately 10.5% of all international tourists in 2024, totaling around 155.603 (in 2019 – around 234.000) visitors. Denmark welcomed around 5.5 million German visitors in 2023, accounting for approximately 17.7% of all international tourist arrivals. In most of the analyzed countries, tourists from the Netherlands and Norway also represent a significant share of the market.
- **Germany and Poland host the highest number of tourists among the analyzed countries**, reflecting their diverse tourism offerings, strategic locations in Europe, well-developed infrastructure. These are also the largest countries by area and population among those analyzed.
- **Lithuania and Poland host a large number of tourists from neighboring countries**, highlighting **strong regional travel flows**. In Poland, approximately 80% of international tourist arrivals come from neighboring countries such as Germany, Czech Republic, Slovakia, Lithuania and Ukraine. In 2023, Germany alone accounted for over 38% of all foreign tourists visiting Poland.
  Similarly, in 2024 over 60% of Lithuania's international tourists come from neighboring or nearby countries, with Latvia and Poland topping the list.
- **In Lithuania the total number of foreign tourist arrivals is relatively lower than in other countries** – about 5.03 million in 2024. This leads to two possible assumptions: 1) inbound tourism in Lithuania is still influenced by concerns about **the regional security** situation. A 2022 survey by the European Travel Commission revealed that around 11% of European travelers identified the "Russia-Ukraine conflict" as their top concern when traveling in Europe; 2) the share of **domestic tourism in Lithuania** is considerably higher than in other countries (Inbound/Domestic share: 35%/65%, 2024).

Main distinctive features of each country. Main distinctive features

- **Sweden and Germany** stand out for attracting a relatively high proportion of **international tourists not only from Europe**, but also from other continents, **particularly the United States**. In Germany, the United States is consistently among the top five source markets for inbound tourism outside Europe. In 2023, over 2.2 million overnight stays were recorded by U.S. visitors, making the U.S. Germany's most important long-haul market. A larger number of these visitors were concentrated in the South of Germany's tourism market (Schloss Neuschwanstein, Black Forest, etc.). Similarly, Sweden in 2023 more than 400.000 overnight stays were recorded by American visitors.

- In 2024, **Danish tourism** (compared to the previous years) **across all regions grew** by 2.1%, driven by a 4.8% rise in foreign overnight stays. Germany alone contributed near 20 million overnight stays nationally, marking it the largest international market.

- The main inbound markets <u>**for wellness tourism**</u> in the South Baltic region are **dominated by European neighbors**, with a notable presence from North America. In Lithuania, medical spa tourism is particularly popular not only for Germans (15.06%), Latvians (15.41%), but also among non-EU visitors – for tourists from Israel (17.61%), 2023 data. In 2024, Lithuania's wellness tourism sector experienced significant growth, with a record 290.000 visitors to its sanatoriums and rehabilitation centers – 16% increase from the 2023 year. Meanwhile, in Lithuania, around 138.000 visitors in the first 11 months of 2024 came from Poland, complemented by 126.000 from Germany and 106.000 from Latvia. In Germany, approximately 38% of wellness tourists arrive from within Europe, especially from the Sweden, Denmark, Austria, Switzerland and Poland. Sweden draws a substantial share of its wellness tourists from Europe and beyond from the United States alone contributed over 400.000 overnight stays in 2023, marking a strong long-haul market presence.

Main/Competitive N-B-Well tourism destinations in South Baltic Area

Main distinctive features of each country. Main distinctive features

- The South Baltic region is rich in nature-based wellness destinations and resources (see Table 2). Due to their unique natural environments, Sweden, Lithuania and Denmark actively promote **forest bathing and silence tourism, prioritizes coastal tourism, city breaks and increasingly sustainable wellness tourism**.
- Since nature-based wellness is closely linked to spa and medical spa services, Poland and Lithuania lead as **spa resort** destinations, offering high-quality, resource-rich spa towns and well-preserved natural areas.
- Germany and Sweden provide more **niche wellness experiences**. Germany stands out with its strong wellness infrastructure and historic spa towns that integrate medical wellness with natural surroundings. Germany leads in wellness and medical tourism, with over 350 certified spa towns.
- Sweden, on the other hand, emphasizes **wilderness wellness** – from traditional sauna rituals to deep forest immersion, often in remote settings. All of the analyzed countries boast UNESCO-protected sites and national parks, which enhance the prestige and conservation of their wellness destinations.

Tourism Statistics and Key Visitor Markets

Country	Main/Competitive N-B-Well Tourism destinations in the Country	Main/Competitive N-B-Well Tourism destinations in the South Baltic area	Key N-B-Well activities	Main factors attracting tourists
	Zealand Region; Bornholm; Legoland & Jutland coasts; Funen & Odense regions; Skagen, Jutland west coast; Aarhus & Aalborg	Møn Island & Møns Klint (Zealand Region); South Funen Archipelago & Ærø Island; Lolland-Falster Nature Parks & Maribo Lakes; Guldborgsund & Nysted Coastline	Coastal and countryside retreats, forest bathing, sea spas, hiking & cycling	Unique landscape, Eco-certifications, sustainable tourism focus, "slow living" vibe, nature-immersion, UNESCO-protected sites
	Baden-Baden (Black Forest) - "Great Spa Town of Europe"; Sylt (North Sea Island); Bavarian Alps (e.g. Zugspitze); Rugen Island; Mecklenburg-Vorpommern region	Rügen Island's beaches (Schaabe, Binz), Mecklenburg lakelands & Dark Sky areas; Usedom Island; Fischland-Darß-Zingst	Sea breeze therapy, chalk cliffs, beach spas, yoga retreats, thermal spas, hiking & cycling	World-class spa traditions, natural landscapes, pristine coastline, sustainable tourism model, medical wellness, UNESCO-protected sites
	Tatra Mountains/Zakopane, Masurian Lakes, Baltic Coast, Białowieża Forest, Krynica-Zdroj, Dunajec Gorge	Dolny Śląsk (Lower Silesia), Śląsk (Silesia), Zachodniopomorskie (West Pomeranie), Kołobrzeg, Ustka & Łeba	Seaside resorts, mud therapy, thalassotherapy[1], spa sanatoriums, forest retreats, salt caves, nature trails	Affordable, traditional spa towns, UNESCO-listed forests, large-scale wellness infrastructure, unique dune landscape
	Curonian Spit - UNESCO National Park; Palanga, Birštonas, Druskininkai - SPA, mineral water resorts; Resort areas: Anykščiai, Trakai, Zarasai, Ignalina (including Strigailiškis and Palūšė), Kulautuva, Kačerginė, Zapyškis; Žemaitija, Aukštaitija, Dzūkija - National parks	Neringa (Curonian Spit), Palanga, Klaipėda, Nemunas Delta Park, Rambynas Regional Park, Pajūris Regional Park, Žemaitija National Park	Wellness-focused resorts and spa hotels, mineral springs, mud therapy, dunes, coastal pine forests bathing[2], forest bathing, hiking routes	Rich in natural resources, UNESCO site, strong balneology, wellness infrastructure, eco-wellness orientation, remote and peaceful setting, slow tourism
	Dalarna Region; Harads (Treehotel), Rukajarvi & Abisko (Swedish Lapland), Yasuragi (Stockholm); Skåne; Gothenburg with the Westcoast archipelago	Gotland, Öland, Blekinge Archipelago	Coastal cliffs, outdoor spas, yoga and forest retreats, seaweed baths, family wellness stays, hiking, eco-lodging	Sustainability, Forest-based, rustic wellness, Nordic spa culture/sauna, strong nature accessibility, UNESCO biosphere site

Table 2. Main/Competitive N-B-Well tourism destinations and key activities and factors attracting tourists

South Baltic Regional Cases

Lithuania. Neringa – Curonian Spit

Neringa is one of the most popular resorts in Lithuania, situated in the UNESCO-recognized Curonian Spit National Park. It is located 361 km from Vilnius and 263 km from the city of Kaunas. The resort is visited by people from all walks of life who seek to relax and enjoy the serene environment that hosts pine forests, beaches and peaceful towns. Neringa offers SPA facilities with treatment procedures and sand beaches for recreational purposes.

Neringa is one of the most attractive seaside destinations for both Lithuanian and foreign tourists. According to data from the „Keliauk Lietuvoje“ (2024), Neringa consistently ranks among the top visited seaside destinations by international tourists, with over 67.761 foreign visitors and 168.240 overnights in 2024. Top countries by tourist arrivals: Germany (2.604), Latvia (1.134), Poland (1.096), UK (986). More than half of domestic tourists (59%) who vacation in Lithuania choose the seaside for their main annual holidays.

Pomorskie Voivodship, Poland

As a destination, this province is great for health resorts and spas on the Baltic Sea as well as many interesting historical sites. Highlights include the UNESCO-listed Castle of the Teutonic Order in Malbork, two national parks (Słowiński and Tuchola Forest) also cultural and historical ones, starting with the region's capital of Gdańsk. Dolny Śląsk (Lower Silesia), Sląsk (Silesia), Zachodniopomorskie (WestPomeranie) are the main, competitive nature-based wellness tourism destinations in Pomorskie Voivodship. Both the Pomeranian and West Pomeranian Voivodeships offer a wide range of wellness tourism, with the main difference being their specialization. The West Pomeranian Voivodeship stands out for its strong medical spa sector and a high concentration of facilities in and around Kolobrzeg, while the Pomeranian Voivodeship offers a wider selection of facilities, from luxury wellness hotels to smaller resorts, often combined with active recreation by the sea.

Pomorskie Voivodeship remains one of Poland's top 5 tourism regions in 2024, supported by high bed capacity and strong coastal appeal. While domestic guests dominate, foreign visitors - largely from Germany (1.8 mln), the UK (692.400), Ukraine (887.600) and the USA (557.200) in 2024 makes up around one-fifth of stays nationally. In 2024, Pomorskie Voivodeship recorded 9.978.865 overnight stays, confirming its status as one of the leading tourist destinations in Poland. Pomorskie's continued growth not only as one of Poland's leading destinations, but also as an emerging hub for nature-based and wellness tourism. With its expansive sandy beaches, pristine forests, national parks and a growing range of health resorts and eco-retreats, the region offers a unique blend of relaxation, outdoor activity and natural healing experiences.

Mecklenburg-Vorpommern, Germany

Mecklenburg-Vorpommern sets standards throughout Germany in tourism area. In 2023 year, there are calculated 7.672.047 arrivals and 32.155.709 overnight stays. Mecklenburg-Vorpommern is Germany's most popular destination for summer and family travel.

Mecklenburg-Vorpommern also boasts a fascinating and impressive variety of cultural and natural landscapes. The 2000 kilometres (1.200 miles) of Baltic Sea and lagoon coastline and more than 2.000 lakes attract guests from far and wide. Rügen Island's pristine beaches, such as Schaabe and Binz, offer iconic seaside charm, while the vast Mecklenburg lakelands and designated Dark Sky areas provide tranquil escapes into unspoiled nature.

Destination boasts a long tradition as a resort destination. With its mild, healthy climate, sunny regions, clean air and natural deposits of chalk, peat and brine, the state offers ideal conditions for relaxation, recreation and good health. A total of 75 towns, cities and municipalities have already been granted state approval in accordance with the Health Resort Law: Guests can take a break from everyday life and enjoy their holidays while doing something good for their health: for example, by taking advantage of the attractive sport and recreational facilities, the modern spa-treatment centres and the rehabilitation clinics and health centres with high-quality therapeutic services.

Top countries by tourist arrivals are Denmark, Sweden, Netherlands, Poland, Switzerland, Belgium (Arrivals in 2023); Sweden, Denmark, Netherlands, Poland, Switzerland (Overnight stays in 2023)

Sjælland (in English Zealand), Denmark

Zealand region consisting of numerous islands, has a lot of beautiful, sometimes spectacular nature to offer. Coastal & maritime tourism makes up around 37 % of tourism revenue in coastal regions.
Sjælland (Zealand), Denmark’s largest island region, comprising Copenhagen and surrounding islands, boasts dramatic coastal cliffs, serene fjords, and lush forests. Iconic spots like Møns Klint and Zealand’s cycling trails reinforce its appeal to nature and wellness seekers. The region’s rural coastlines, expansive farmland, and eco-friendly retreats contribute to its growing reputation as a green tourism destination. In 2023, Østdanmark (the Capital Region + Zealand) recorded 21.4 million overnight stays, of which 9.99 million (≈47%) were by foreign visitors.

Germany remains the leading international market in Sjælland and Denmark overall, accounting for over 20 million foreign overnight stays in 2024. The Neherlands followed (~1.8 mln), then the UK and USA, both exceeding 1 million overnight stays. The Østdanmark region experienced a notable rebound in Swedish tourism (847.000 overnight stays).

NATURE-BASED WELLNESS TOURISM

Interreg South Baltic

Co-funded by the European Union

Klaipėdos universitetas

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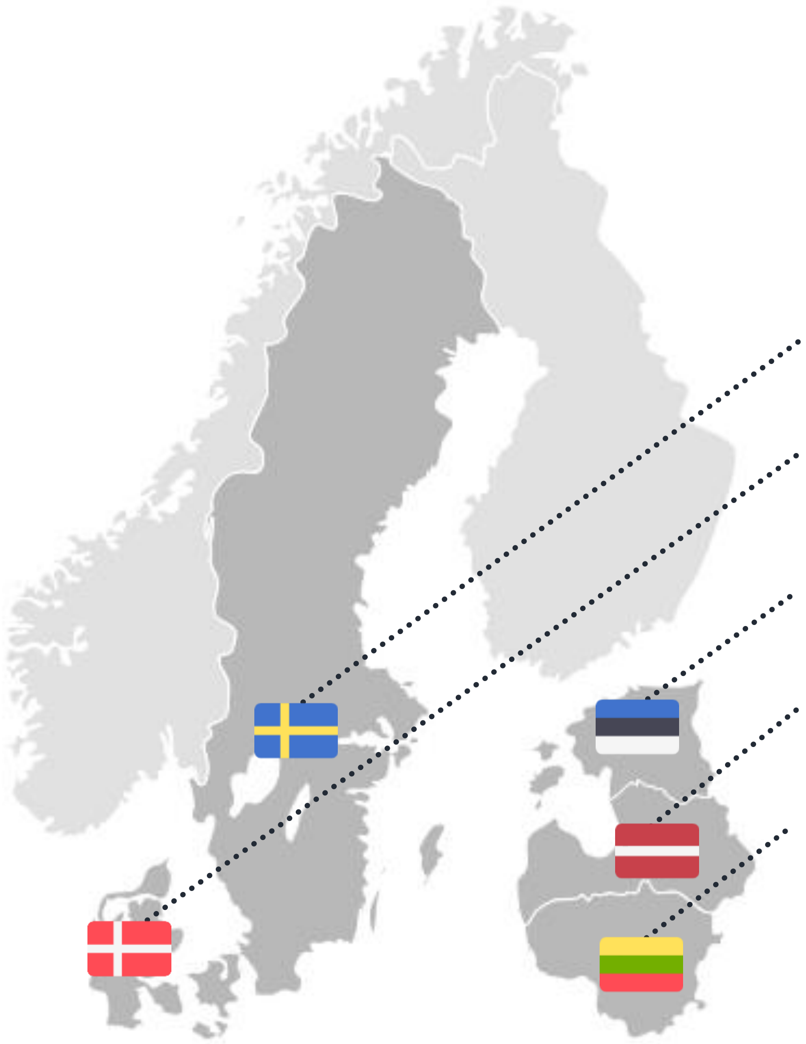

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