

# Lithuania

## Tourism in the economy and outlook for recovery

Tourism is an important sector in Lithuania. In 2020, tourism directly contributed to 1.7% of total GVA in Lithuania, down from 2.9% in 2019. The tourism sector accounted for 45 769 jobs in 2020, representing 4.7% of total employment in the country. This represented 5 619 fewer jobs than in 2019.

In 2021, 948 000 international tourists visited Lithuania, an increase of 1.2% compared to 2020, but 67% below pre-pandemic levels. International tourism accounted for 1.2 million nights and EUR 494 million in expenditure - amounting to 3.9% of service exports in 2021.

Lithuania's top market source in 2021 was Latvia, with 180 000 overnight visitors. The next top market sources were Poland, Germany, Belarus, and Russia. Russia's war in Ukraine has created uncertainty for Lithuania's tourism recovery.

Increasing domestic tourism and a shift towards neighbouring markets had a positive impact on overall numbers. Domestic tourism became the main market in 2020-21, contributing to 54.6% of tourism expenditure in 2020, up from 40.5% in 2019. In 2021, 3.1 million overnight domestic tourist trips were recorded, a 26.7% increase compared to 2020 and 9.3% above pre-pandemic levels.

## Tourism governance and funding

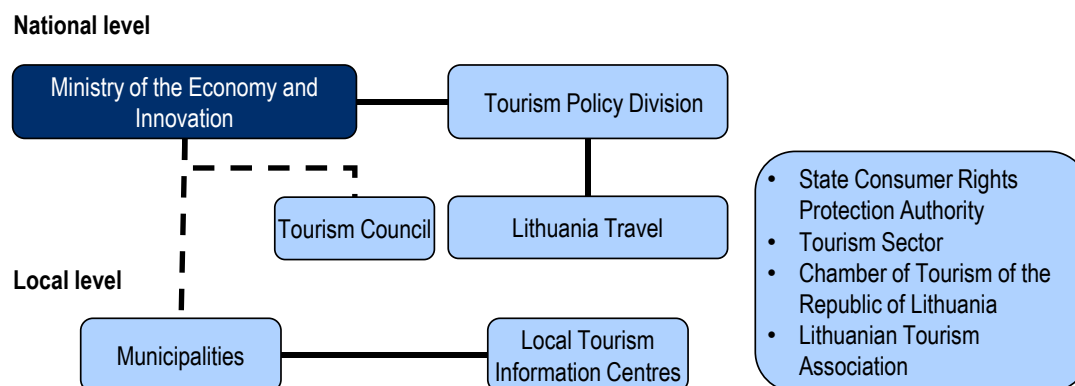
The Ministry of Economy and Innovation has lead responsibility for tourism, with the Tourism Policy Division responsible for shaping national tourism policy, destination development and international relations. The Ministry of the Economy and Innovation works closely with other ministries, including Health, Culture, Transport and Communications, Foreign Affairs, Agriculture, and Environment, as well as municipalities and the private sector. Particular attention has been paid to health and safety protocols, with significant investments made to support tourism businesses.

Lithuania Travel is the national tourism organisation responsible for raising awareness of Lithuania as a tourism destination through marketing and tourism promotion and developing inbound and domestic tourism. Lithuania Travel is a public institution and reports to the Ministry of the Economy and Innovation. The State Consumer Rights Protection Authority is responsible for the supervision of tour operators, travel agencies and accommodation providers and represents consumer interests in the event of tour operator insolvency.

Municipalities are involved in tourism at the local level, including through the operation of Tourism Information Centres. The Ministry actively communicates with all sector representatives, and a monthly format for presenting issues and answering questions has been created to aid communication. The Working Group on the Co-ordination of the Application of Emergency Measures to Business at the State Level holds meetings to discuss the most important issues with representatives from various business areas, including tourism.

Lithuania's tourism budget is approximately EUR 3 million, with a further EUR 1 million allocated from EU funding. Because of COVID-19, in the last three years, Lithuania dedicated additional sums to the recovery of tourism - EUR 17 million in 2020, EUR 6 million in 2021 and EUR 4 million in 2022. All Lithuanian health resorts and main cities introduced a tourist tax of EUR 1 per person per night, levied on visitors using accommodation services. The tax revenues fund international marketing activities and improve the cities' infrastructure and quality of life for residents. A similar tax was initially applied in five other towns and resorts and the capital Vilnius.

### Lithuania: Organisational chart of tourism bodies



Source: OECD, adapted from the Ministry of the Economy and Innovation, 2022.

### Tourism policies and programmes

The main challenges for Lithuanian tourism are recovery from COVID-19 and the sector's resilience to Russia's war in Ukraine. The impacts of COVID-19 have driven the short-term priorities for the tourism sector. Programmes implemented to respond to the pandemic include:

- 'Tourism Innovation' measures intended to create, improve, and represent tourism services and digital training for the sector.
- Loans for tour operators, accommodation, and catering providers to enable settlements with tourists who refuse travel vouchers.
- Holiday vouchers worth EUR 200 for medical workers in Lithuania. Vouchers pay for a package of services provided by local tour operators, accommodation providers, transport, catering, spas, and entertainment.
- Investment in skills development, including languages, sales and marketing skills, professionalism, and intercultural competence.

To manage and mitigate the impact of COVID-19 on the tourism sector, Lithuania initiated a tourism sector promotion plan, which included measures to promote recovery and transform the tourism ecosystem. The COVID-19 pandemic also necessitated a change in the legal framework for the tourism sector. Amendments were made to the Civil Code of the Republic of Lithuania and the Law on Tourism, allowing tourist coupons valid for 12 months for trips that did not occur due to an emergency.

Medium and long-term priorities have previously been set out in a tourism-specific strategy. As of 2021, sectoral strategies are no longer prepared in Lithuania. The tourism strategy is now part of the Economic Transformation and Competitiveness Development Programme. This programme underpins the development of the Lithuanian economy for the period to 2030 and will pursue the objectives set out in the

National Progress Plan. Overall, the Tourism Promotion section of the Programme aims to increase the competitiveness of the Lithuanian tourism sector. Implementation measures address relevant issues, including those related to the areas of regulation of other ministries, such as accessibility; improving the image of Lithuania as an attractive country for tourism; improving human resources competencies; investing in infrastructure; adaptations for people with disabilities and using innovation to improve the quality of tourism services.

Lithuania is currently reviewing two progress measures and implementing actions dedicated to tourism:

- Transformation of the tourism sector: aimed at making structural reforms to the tourism data collected, disseminated, and used in the decision-making process.
- Progressive tourism infrastructure and marketing: seeks to implement model destination management organisations in the country and invest in infrastructure and create new means to promote Lithuanian tourism products and communicate abroad.

As part of efforts to identify the most effective ways to increase the competitiveness of the tourism sector and prepare sustainable tourism development guidelines, Lithuania is working with neighbouring countries in the Baltic Sea Region to achieve the UN Sustainable Development Goals as they apply to tourism. In this context, the 1<sup>st</sup> Youth Sustainable Tourism Forum and Competition of Sustainable Tourism Ideas has been organised.

## Statistical Profile

### Lithuania: Domestic, inbound and outbound tourism

	2017	2018	2019	2020	2021
<b>TOURISM FLOWS, THOUSAND</b>					
<b>Domestic tourism<sup>1</sup></b>					
Total domestic trips	14 247	14 678	14 785	11 389	11 593
Overnight visitors (tourists)	2 528	2 641	2 827	2 438	3 090
Same-day visitors (excursionists)	11 719	12 037	11 958	8 951	8 503
Nights in all types of accommodation	3 934	4 355	4 804	3 812	4 360
Hotels and similar establishments	3 901	4 285	4 717	3 758	4 239
Other collective establishments	32	70	87	55	121
Private accommodation	..	..	..	..	..
<b>Inbound tourism<sup>2</sup></b>					
Total international arrivals	5 590	6 115	6 150	2 284	2 096
Overnight visitors (tourists)	2 523	2 825	2 875	937	948
Same-day visitors (excursionists)	3 067	3 291	3 275	1 348	1 148
Top markets					
Latvia	308	362	357	86	180
Poland	218	250	248	89	108
Germany	214	242	243	113	81
Belarus	432	443	424	103	67
Russia	257	286	273	70	34
Nights in all types of accommodation	3 431	3 737	4 143	1 120	1 183
Hotels and similar establishments	3 397	3 695	4 091	1 104	1 167
Other collective establishments	34	42	51	16	15
Private accommodation	..	..	..	..	..
<b>Outbound tourism</b>					
Total international departures	4 294	4 703	4 882	1 643	1 743
Overnight visitors (tourists)	2 032	2 244	2 347	682	830
Same-day visitors (excursionists)	2 262	2 458	2 534	961	913
Top destinations					
Latvia	233	250	260	118	111
Poland	160	169	178	61	89
Germany	123	132	146	58	54
United Kingdom	213	215	217	57	45
Norway	88	94	101	47	36
<b>TOURISM RECEIPTS AND EXPENDITURE, MILLION EUR</b>					
<b>Inbound tourism</b>					
Total international receipts	1 381	1 503	1 442	581	..
International travel receipts	1 169	1 274	1 333	507	..
International passenger transport receipts	212	229	109	74	..
<b>Outbound tourism</b>					
Total international expenditure	1 158	1 361	1 420	523	..
International travel expenditure	984	1 186	1 241	475	..
International passenger transport expenditure	174	175	180	48	..

.. Not available

1. Trips from demand side surveys; Nights from supply side surveys.

2. Arrivals from demand side surveys; Nights from supply side surveys.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/zqu9n2>

## Lithuania: Enterprises and employment in tourism


	Number of establishments <sup>2</sup>	Number of persons employed				
	2020	2017	2018	2019	2020	2021
<b>Total</b>	..	..	..	..	..	..
<b>Tourism industries</b>	<b>23 273 p</b>	<b>47 168</b>	<b>49 090</b>	<b>51 388</b>	<b>45 769 p</b>	..
Accommodation services for visitors <sup>1</sup>	3 943	14 457	14 856	14 889	12 535 p	..
Hotels and similar establishments	486	14 457	14 856	14 889	12 535 p	..
Food and beverage serving industry	3 947	13 065	14 785	15 660	15 130 p	..
Passenger transport	10 393	9 124	8 548	7 883	7 291 p	..
Air passenger transport	139	824	943	1 042	793 p	..
Railways passenger transport	1	385	185	96	15 p	..
Road passenger transport	10 211	7 908	7 405	6 738	6 478 p	..
Water passenger transport	42	7	15	7	5 p	..
Passenger transport supporting services	..	730	638	840	351 p	..
Transport equipment rental	1 049	459	525	673	615 p	..
Travel agencies and other reservation services industry	1 071	3 377	3 212	4 628	2 770 p	..
Cultural industry	954	2 875	3 709	4 255	4 954 p	..
Sports and recreation industry	1 916	3 081	2 816	2 560	2 123 p	..
Retail trade of country-specific tourism characteristic goods	..	..	..	..	..	..
Other country-specific tourism industries	..	..	..	..	..	..
<b>Other industries</b>	..	..	..	..	..	..

.. Not available; p Provisional data

1. Data for accommodation service for visitors refer to number of establishments.

2. Data refer to number of enterprises.

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/b4xpz2>

## Lithuania: Internal tourism consumption

Million EUR

	2020		
	Domestic tourism expenditure	Inbound tourism expenditure	Internal tourism consumption
<b>Total</b>	..	..	..
<b>Consumption products</b>	<b>804 p</b>	<b>668 p</b>	<b>1 472 p</b>
Tourism characteristic products	457 p	317 p	773 p
Accommodation services for visitors	130 p	57 p	186 p
Food and beverage serving services	106 p	154 p	260 p
Passenger transport services	87 p	31 p	118 p
Air passenger transport services	50 p	23 p	73 p
Railways passenger transport services	8 p	1 p	9 p
Road passenger transport services	27 p	6 p	33 p
Water passenger transport services	2 p	1 p	3 p
Passenger transport supporting services	20 p	13 p	33 p
Transport equipment rental services	66 p	39 p	105 p
Travel agencies and other reservation services industry	33 p	2 p	35 p
Cultural services	8 p	13 p	22 p
Sports and recreation services	7 p	8 p	15 p
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products	347 p	351 p	698 p
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
<b>Non-consumption products</b>	..	..	..

.. Not available; p Provisional data

Source: OECD Tourism Statistics (Database).

StatLink  <https://stat.link/chz48a>



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