

TOURISM IN ESTONIA IN 2017



- In 2017, 3.54 million foreign and domestic tourists stayed overnight in the accommodation establishments of Estonia (220,000 or 6.6% more than in 2016). This means a new record for the 8th consecutive year. The number of foreign tourists amounted to 2.16 million (100,000 or 5% more than in 2016) and the number of domestic tourists to 1.39 million (120,000 or 9.5% more than in 2016).
- The number of nights spent by foreign and domestic tourists in the accommodation establishments amounted to 6.51 million (281,000 or 4.5% more than in 2016). Foreign tourists spent 4.15 million overnights (136,000 or 3.4% more than in 2016) and domestic tourists spent 2.36 million nights (145,000 or 6.6% more than in 2016).
- Overnights by foreign tourists reached a new record for the 2nd consecutive year and overnights by domestic tourists for the 5th consecutive year.
- Of all the nights spent in the accommodation establishments, domestic overnights accounted for 36.2%, Finnish overnights 26%, and Russian overnights 7.4%. German and Latvian overnights both accounted for 4%. The share of domestic overnights increased slightly for the 6th consecutive year, as domestic tourism has increased slightly faster than inbound tourism.
- Among all foreign overnights, the share of Finland was 41%. Russia accounted for 11.6%, Germany for 6.3%, Latvia for 5.9% and Sweden for 3.5% of all foreign overnights.
- In absolute figures, Russian overnights showed the biggest increase among the foreign markets. In addition, Latvian, Spanish, UK, French, Japanese and Chinese overnights contributed to the strong growth in foreign overnights. On the other hand, tourism from Finland showed the biggest decrease in absolute figures. Of the bigger markets, also the overnights of tourists from Norway, Sweden, the USA and Germany showed a decrease.

OVERNIGHTS BY PURPOSE OF TRIP

- The number of foreign overnights increased thanks to the increase in all types of trips. Of the 4.15 million foreign overnights, 2.77 million were spent by holiday tourists (increase by 1.6% or by 43,846 overnights compared to 2016). Foreign overnights on business trips amounted to 880,697 (compared to 2016, their number increased by 36,897 or by 4.4%). Foreign overnights on other trips amounted to 495,658 (compared to 2016, their number decreased by 55,095 or by 12.5%). Nights spent on holiday trips accounted for 67%, business trips 21% and other trips 12% of foreign overnights.
- The number of domestic overnights mainly increased thanks to the strong increase in holiday trips. Of the 2.36 million domestic overnights, 1.29 million were spent by holiday tourists (increase by 10% or by 116,492 overnights compared to 2016). Domestic overnights on holiday trips reached a new record for the sixth consecutive year. Domestic overnights on business trips amounted to 634,290 (compared to 2016, their number increased by 33,113 or by 5.5%). Domestic overnights on other trips amounted to 438,361 (compared to 2016, their number decreased by 4,273 or by 1%). Nights spent on holiday trips accounted for 55%, business trips 27% and other trips 19% of domestic overnights.

MAIN FOREIGN SOURCE MARKETS**FINLAND**

- Tourism from our biggest market Finland decreased by 4% in 2017 – after a strong growth in 2016. The decline compared to the record level of 2016 was partly caused by the increase in hotel rates and lack of hotel capacity in Tallinn due to the EU-presidency in the second half of 2017. Another influencing factor was strong competition from Latvia. In 2017, 916,241 Finnish tourists stayed overnight in the accommodation establishments of Estonia (34,784 or 4% less than in 2016). The number of nights spent by Finnish tourists in the accommodation establishments amounted to 1.7 million (71,396 or 4% less than in 2016).
- In absolute figures, their overnights showed the biggest decrease in **Tallinn**. In 2017, they spent 996,513 overnights in Tallinn, which was 6% or 58,176 overnights less compared to the record level of 2016. In **Pärnu**, their overnights amounted to 363,871 (-4% or 14,000 overnights less than a year ago). On the other hand, their overnights in **Tartu** showed a substantial increase: +26%, thanks to the new hotels and attractions opened there during the second half of 2016. In Tartu, their overnights amounted to 79,724

(16,481 overnights more than a year ago). In Tartu, their overnights reached a new record for the 2nd consecutive year.

RUSSIA

- Russia showed the best result among the inbound markets. After a substantial decline in 2014 and 2015, tourism from Russia started to recover at the end of 2016 and showed good growth throughout 2017. The improved economic situation in Russia has resulted in more outbound trips from Russia in general. In 2017, 238,636 Russian tourists stayed overnight in the accommodation establishments of Estonia (37,664 or 19% more than in 2016). The number of nights spent by Russian tourists in the accommodation establishments amounted to 482,948 (17% more than in 2016).
- In absolute figures, their overnights in Tallinn showed the biggest increase (in comparison with other destinations in Estonia). Russian overnights in Tallinn amounted to 270,109, increasing by 12% or by 28,495 nights. Russian overnights in their second most popular destination Ida-Viru County (North-East Estonia) also showed a healthy increase, reaching 108,441 (29% or 24,395 nights more than in 2016).
- Compared to the record level achieved in 2013, their overnights in Estonia were still 29% down due to the substantial decline experienced in 2014 and 2015. In Tallinn, the number of Russian overnights was 35% down on the record level achieved in 2013.
- On the other hand, it is worth noting that during the past few years when Russian outbound tourism decreased substantially (in 2014 and 2015) and showed a partial recovery (in 2016 and 2017), the accommodation establishments in North-East Estonia managed to recover from the crisis better than other regions of Estonia. In 2017, the number of Russian overnights in North-East Estonia almost reached the pre-crisis record level (it was only 0.4% down on the record level achieved in 2013) whereas the number of Russian tourists in North-East Estonia already exceeded the record level of 2013 by as much as 31%. Thus, North-East Estonia managed to recover from the crisis by attracting shorter-staying Russian tourists.

LATVIA

- Latvia was another strong performer among the inbound markets. In 2017, Latvian overnights reached a new record already for the 7th consecutive year. In 2017, 161,250 Latvian tourists stayed overnight in the accommodation establishments of Estonia (19,207 or 14% more than in 2016). The number of nights spent by Latvian tourists in the accommodation establishments amounted to 243,509 (11% more than in 2016). Tourism from Latvia increased especially in the regions outside Tallinn (e.g. in Tartu, Pärnu and smaller regional destinations). The opening of several new hotels in Tartu, the second largest city of Estonia, had a strong positive influence on the Latvian market but also on other neighbouring markets: Finland, Russia, and Sweden.
- In 2017, 37% of Latvian tourists' overnights in Estonia were spent in Tallinn, 19% in Pärnu, 14% in Tartu and 9% on Saaremaa Island. Their overnights in Tartu (their third most popular destination in Estonia) showed by far the biggest increase (+60%). In 2017, Latvian tourists spent 33,418 overnights in Tartu (12,504 nights more than in 2016). Over the past two years (compared to 2015), their overnights in Tartu even doubled. In Tallinn, their overnights amounted to 90,519 in 2017 (increase by 2%). In Pärnu (their second most popular destination in Estonia), Latvian tourists spent 46,900 overnights (13% or 5,371 nights more than in 2016). On Saaremaa Island, their overnights amounted to 22,323 in 2017 (14% or 2,659 nights more than in 2016).

UNITED KINGDOM

- Another market showing strong growth in 2017 was the **United Kingdom**. Increase from the UK was related to a new air connection from London to Tallinn, opened by British Airways in March 2017. In 2017, 58,402 UK tourists stayed overnight in the accommodation establishments of Estonia (9,669 or 20% more than in 2016). The number of nights spent by UK tourists amounted to 128,076 (19% more than in 2016).

GERMANY

- In 2017, 125,660 **German** tourists stayed overnight in the accommodation establishments of Estonia (282 or 0.2% less than in 2016). The number of nights spent by German tourists in the accommodation establishments amounted to 263,413 (2% less than in 2016). The development of the German market resembles that of the Finnish market: also, tourism from Germany showed a strong increase and reached a new record in 2016 (partly thanks to the increased number of flight connections with Germany).

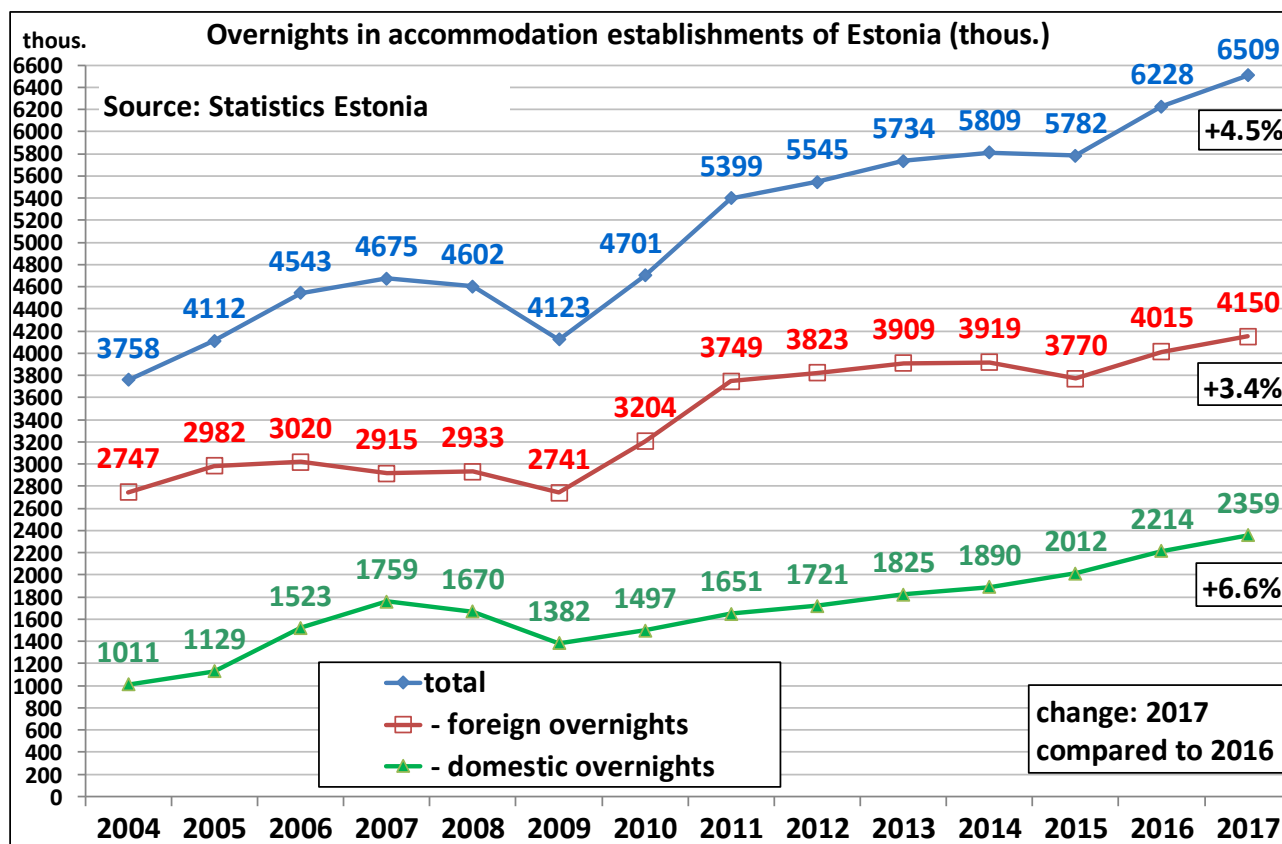
However, in 2017, tourism from Germany showed a small decline caused by the increase in hotel rates and lack of hotel capacity in Tallinn due to the EU-presidency in the second half of 2017.

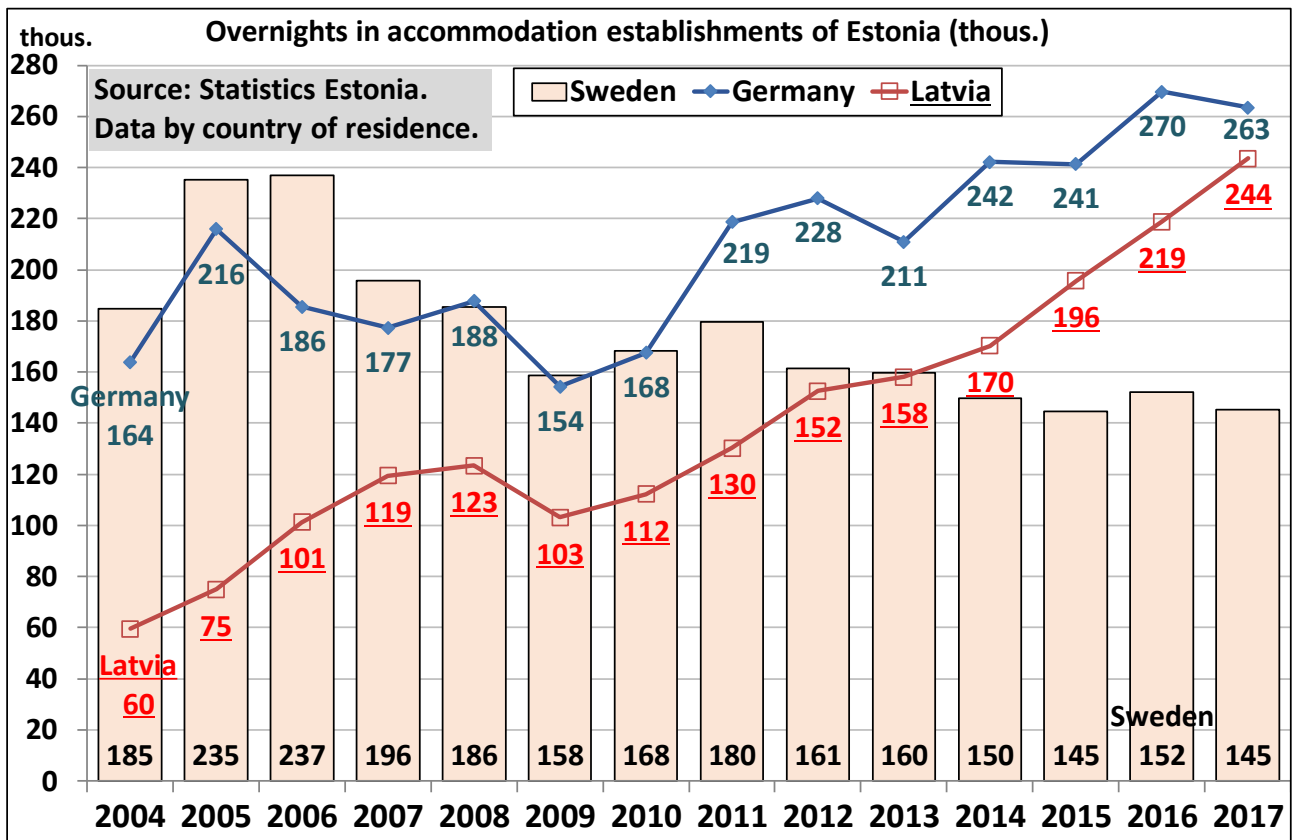
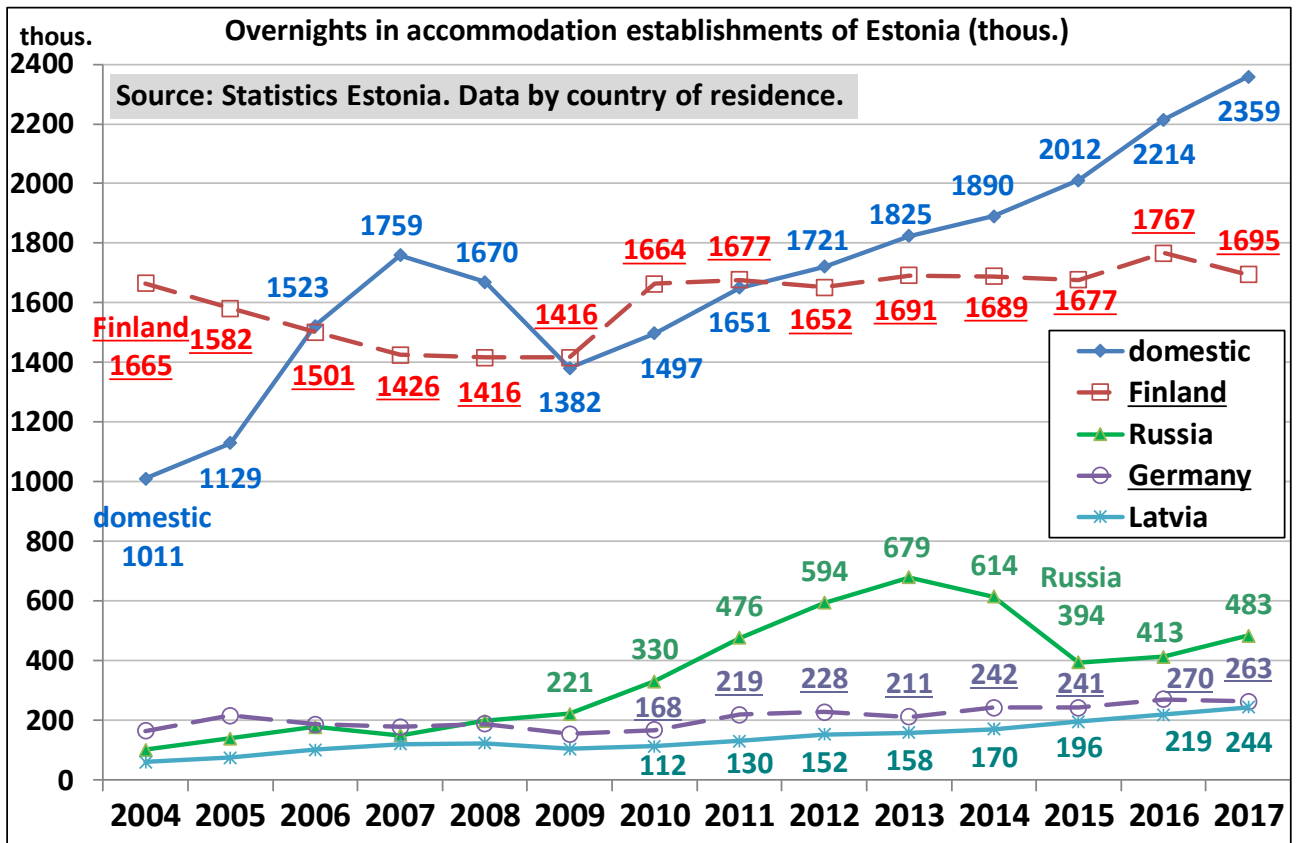
SWEDEN

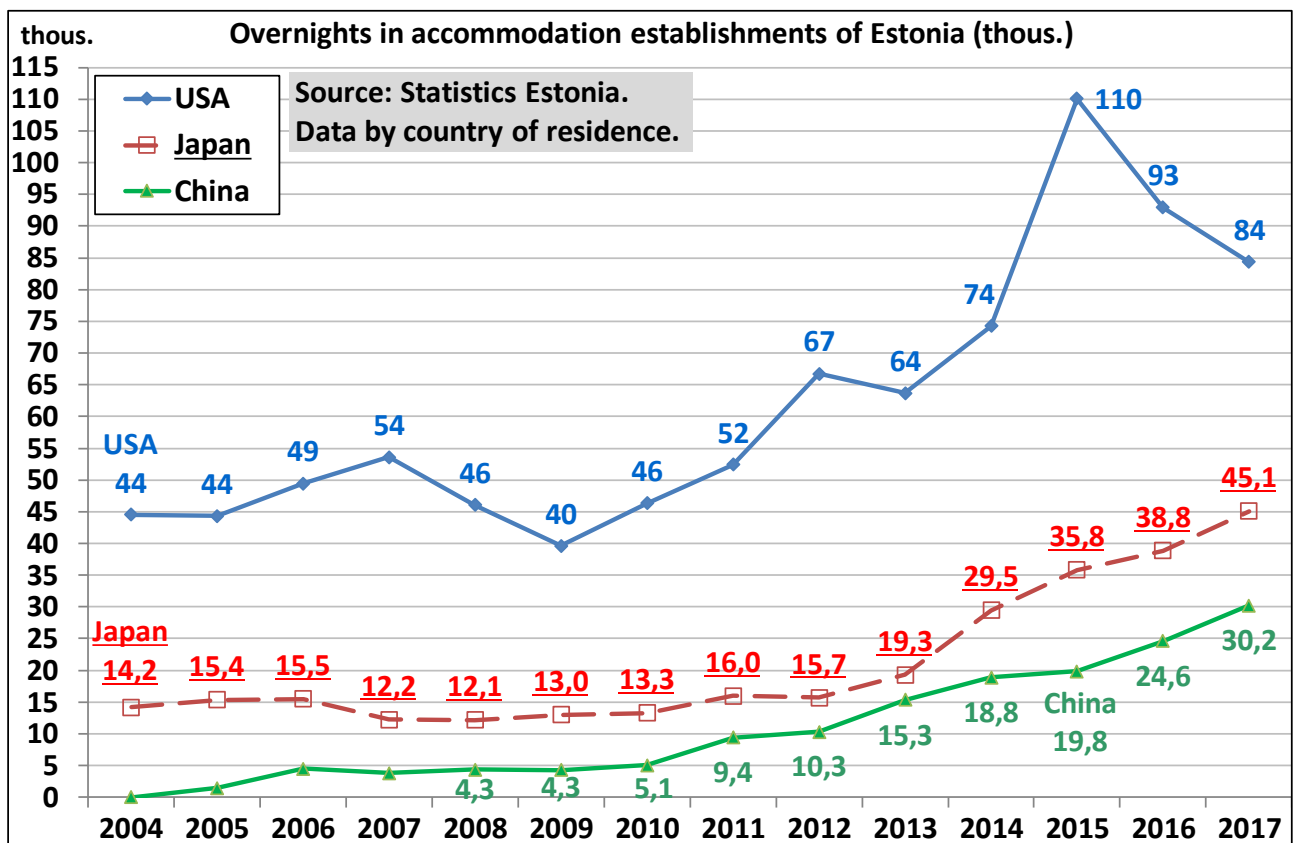
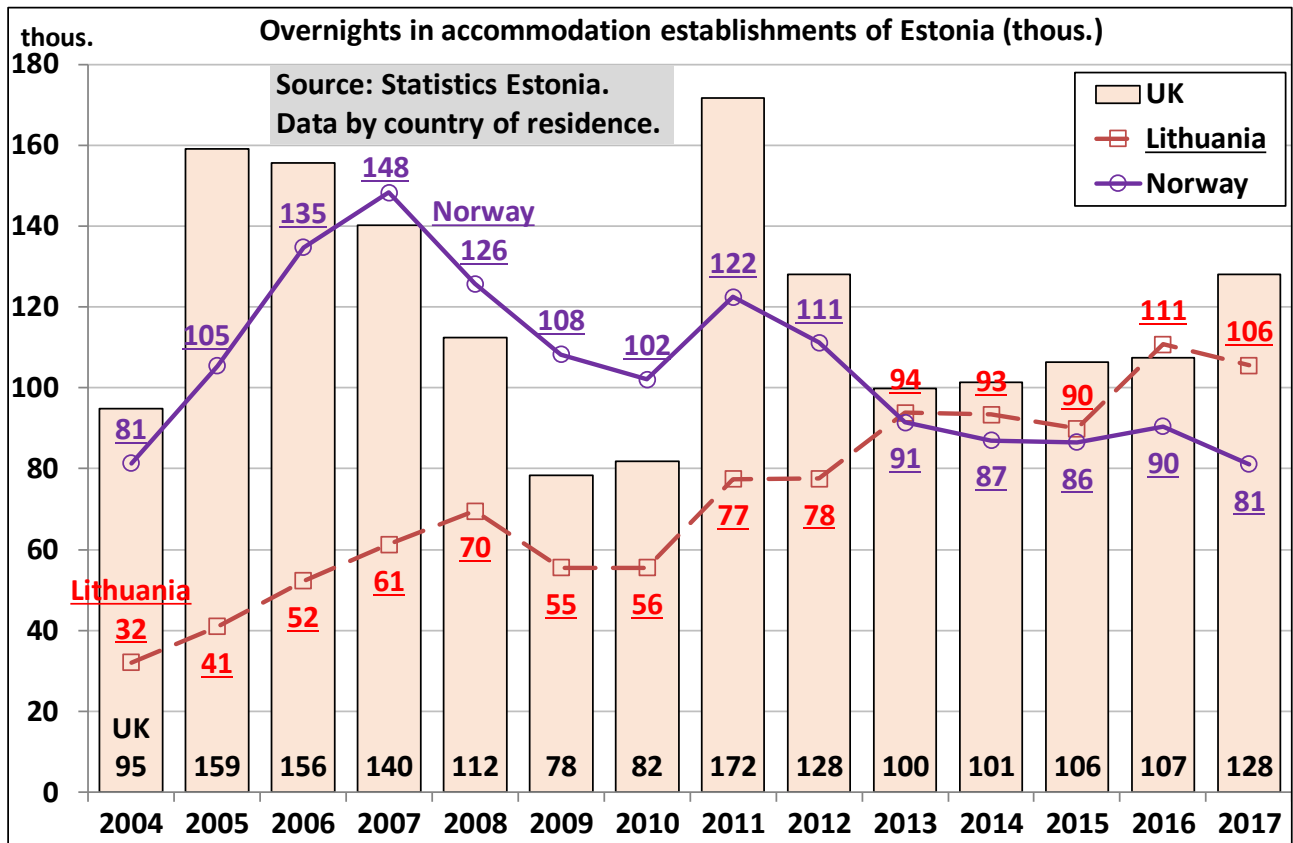
- After an increase in 2016, Swedish overnights showed a decrease in 2017. Strong competition from Latvia probably affected tourism from Sweden: from December 2016, one additional ship started to sail between Riga and Stockholm, resulting in a substantial increase in Swedish overnights in Latvia (+34%). At the same time, their overnights both in Estonia and in Lithuania showed a small decline.
- In 2017, 73,296 Swedish tourists stayed overnight in the accommodation establishments of Estonia (1,119 or 1.5% less than in 2016). The number of nights spent by Swedish tourists in the accommodation establishments amounted to 145,394 (4.4% less than in 2016).
- In 2017, 58% of Swedish tourists' overnights in Estonia were spent in Tallinn, 22% in Pärnu, 5.1% in Tartu and 4.6% on Saaremaa Island. Their overnights mainly decreased in Tallinn (-6%) and in Pärnu (-8%). On the other hand, their overnights in Tartu increased by as much as 23% and their overnights on Saaremaa Island increased by 14%.

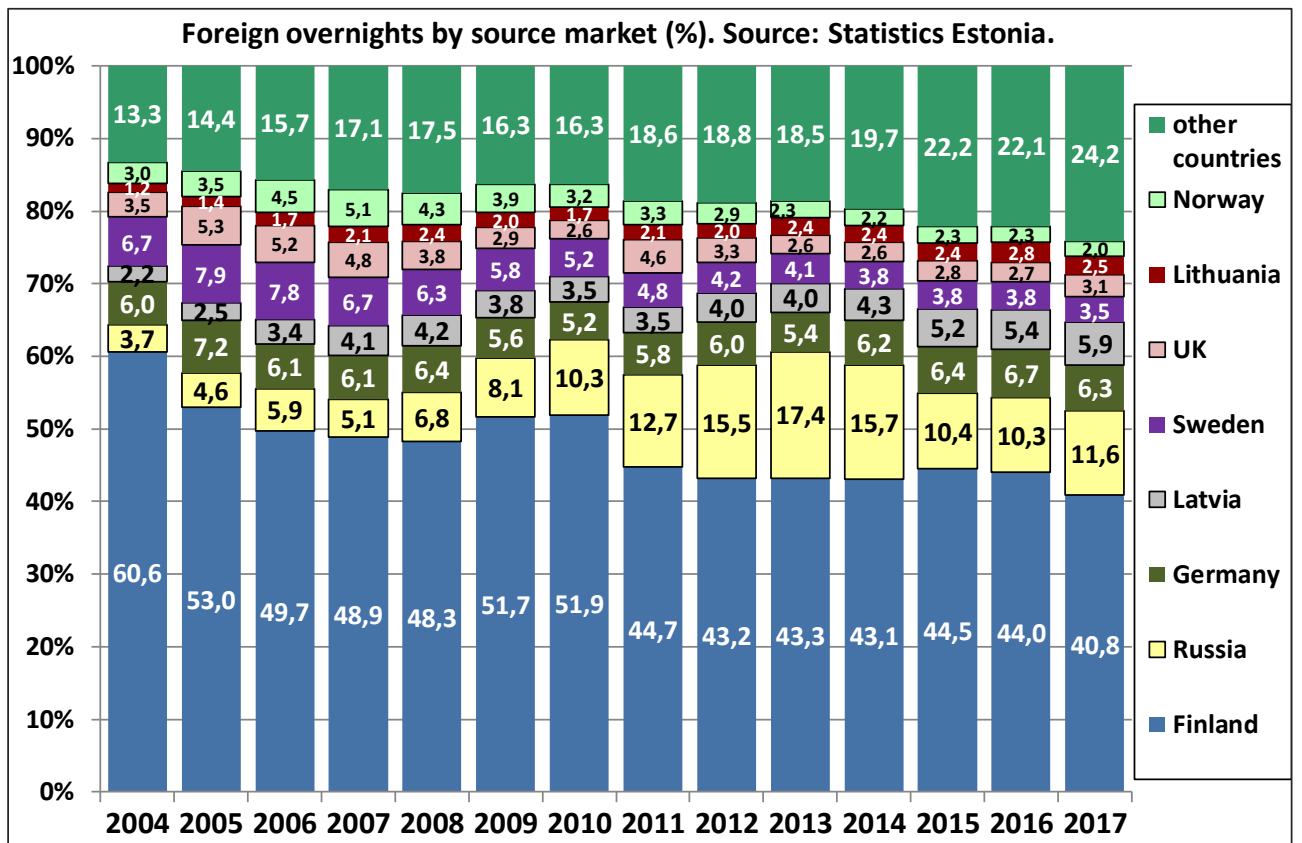
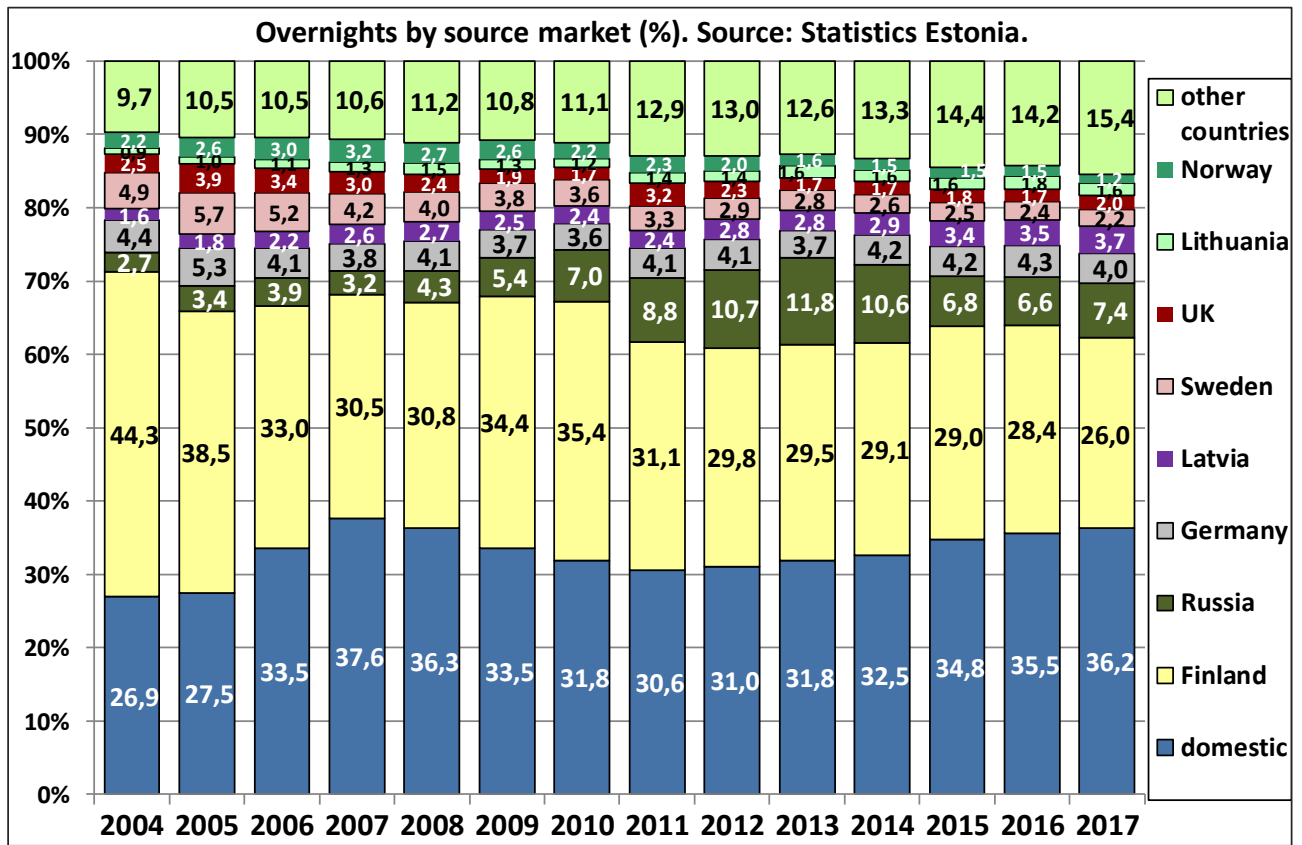
OTHER MARKETS

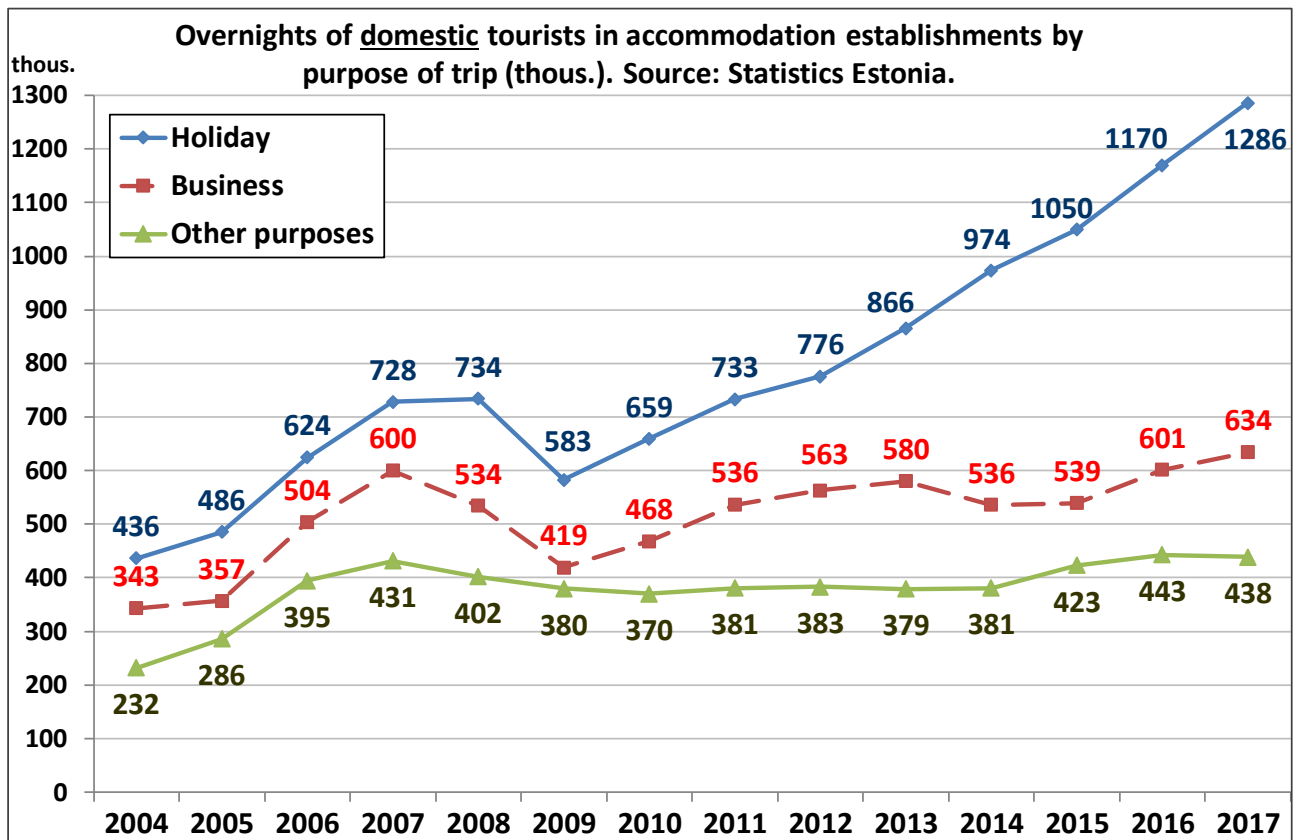
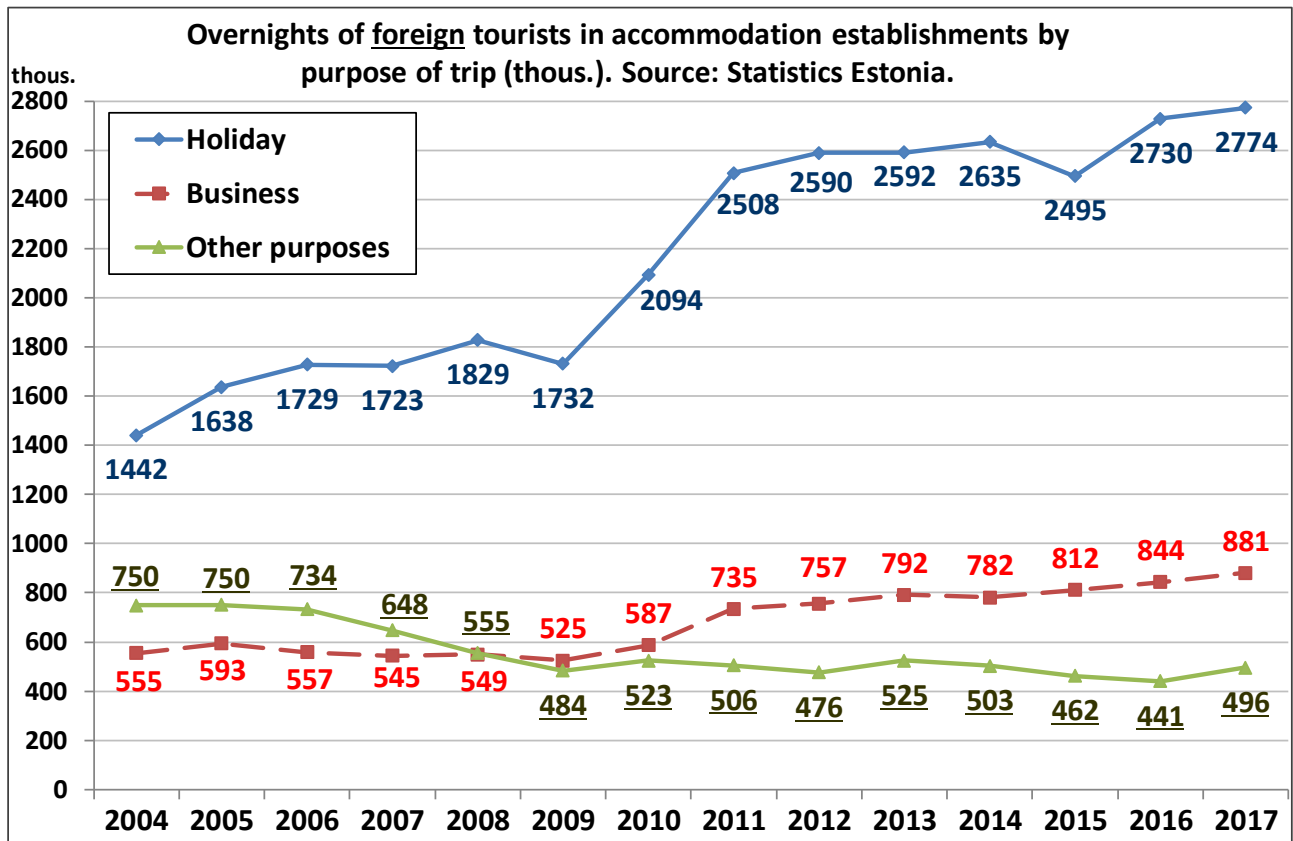
- **Norway** was another market that showed a decrease in 2017, after an increase in 2016 (like Sweden). Tourism from Norway was probably affected by a reduction in the number of flights from Norway. The decline in Estonia also reflected a similar trend in Latvia and Lithuania (where Norwegian overnights decreased by 2% and 15%, respectively).
- Of the somewhat smaller markets, the overnights of **Japanese** tourists reached a new record for the 5th consecutive year and the overnights of **Chinese** tourists reached a new record for the 10th consecutive year. This reflects the active promotion of Estonia on these markets and improved air access from various Asian cities via Helsinki Airport.

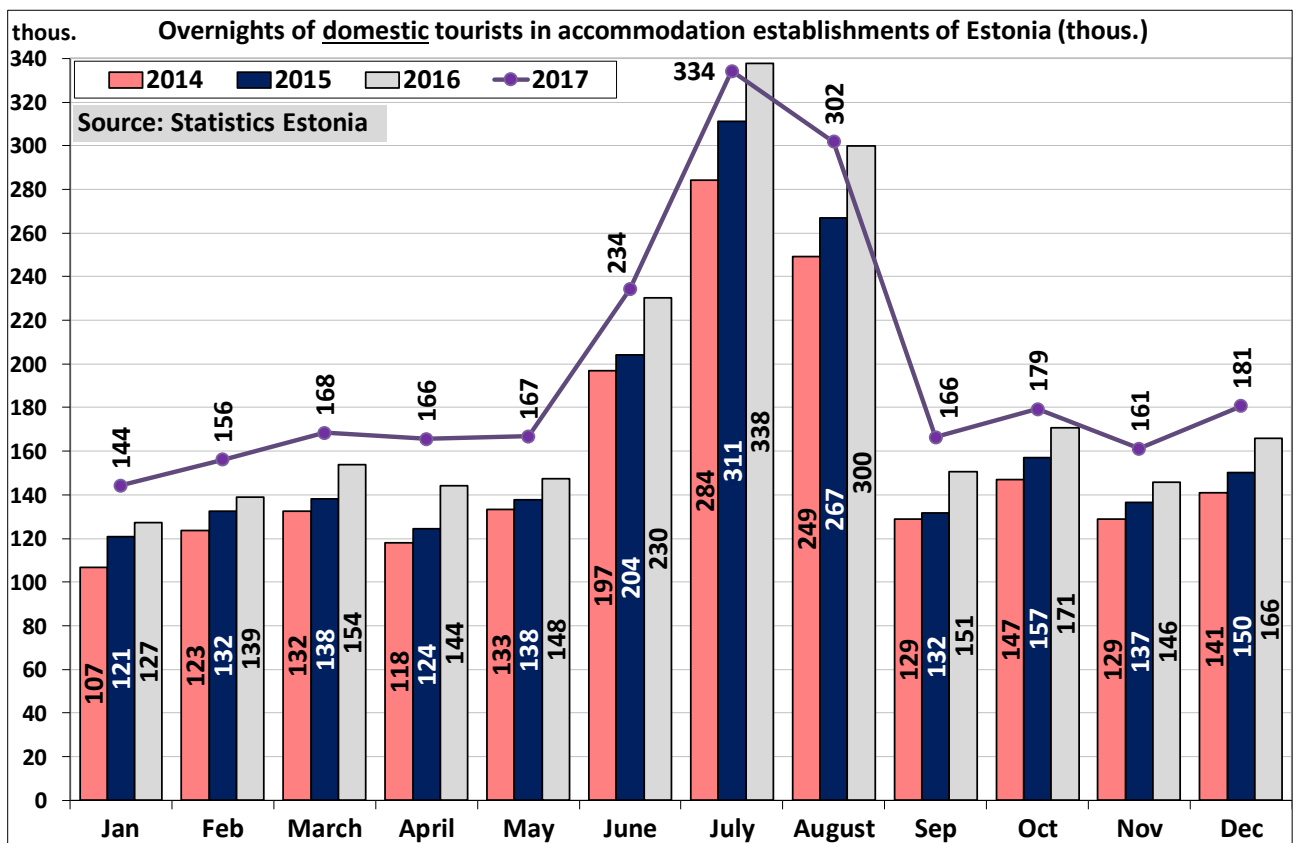
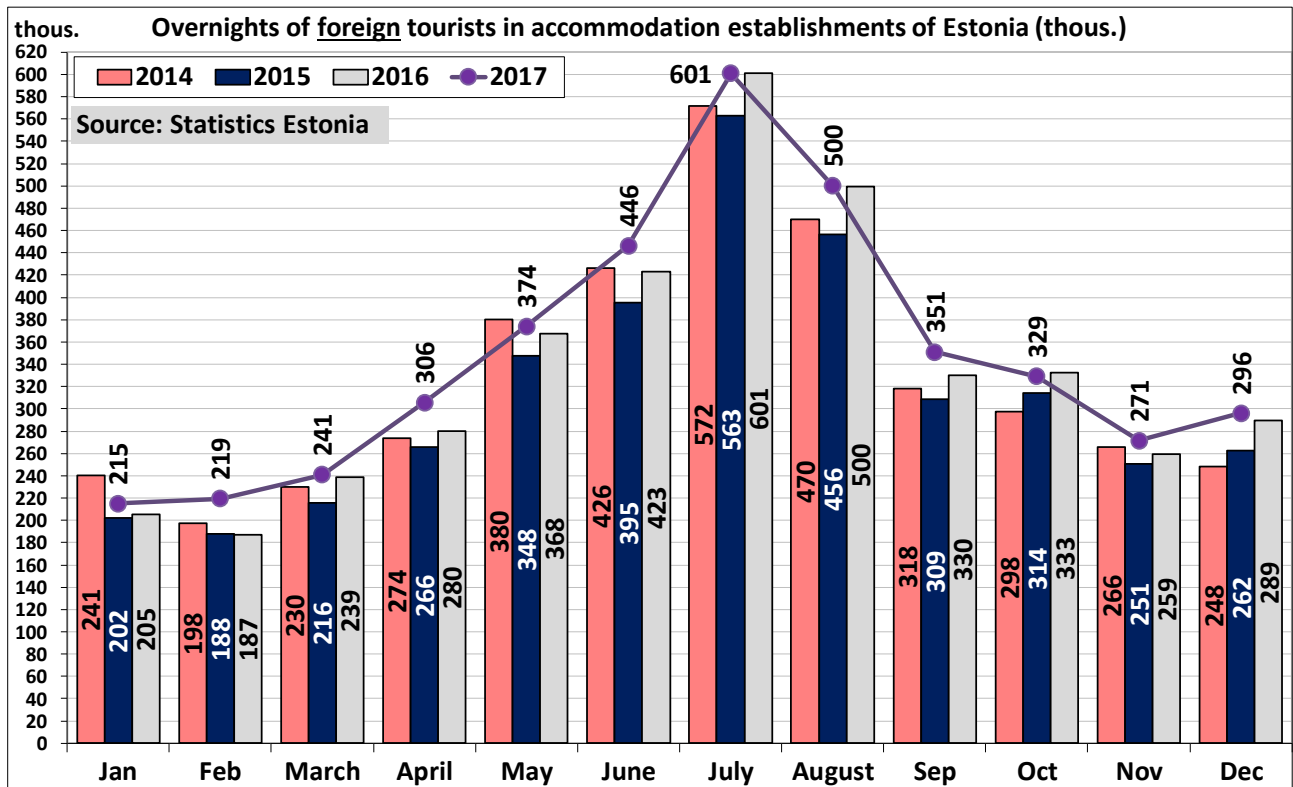


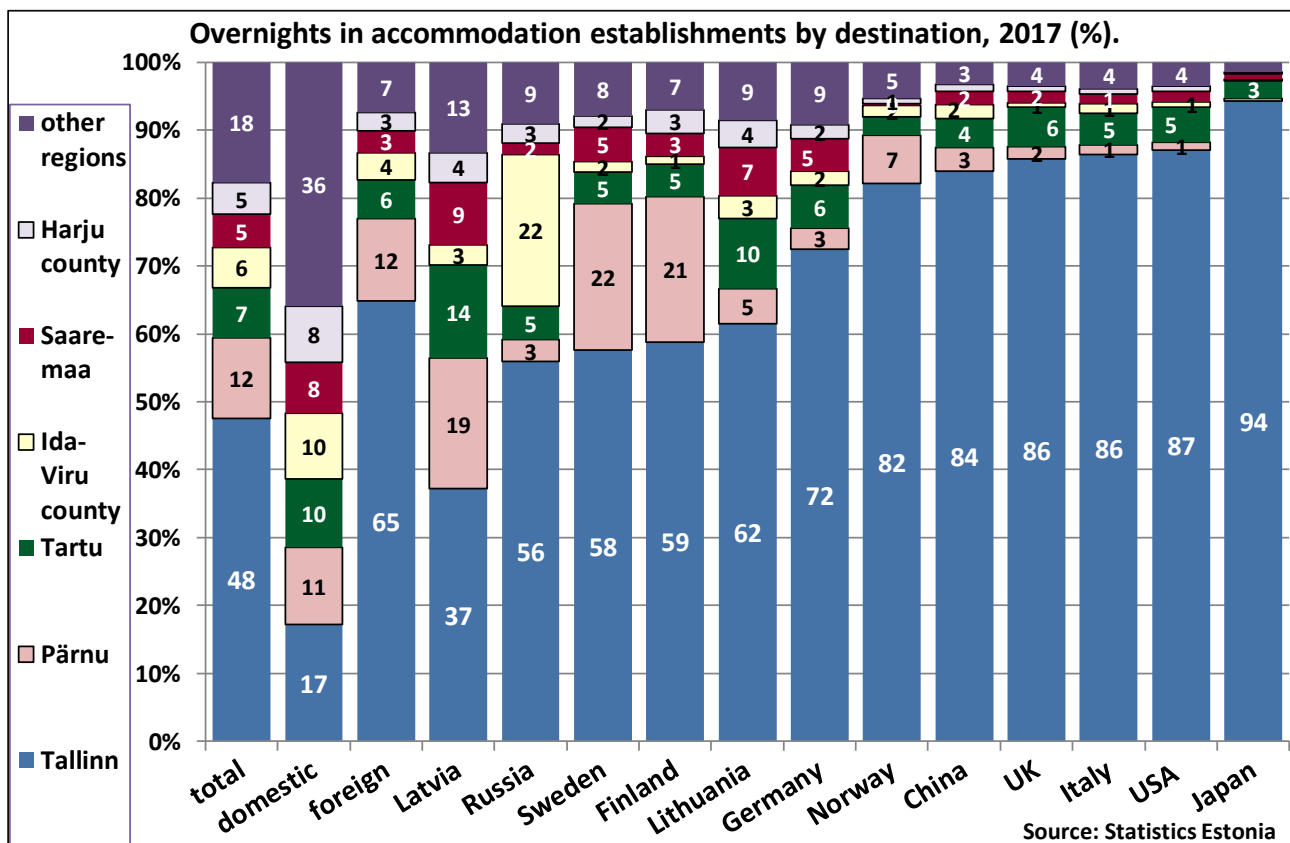
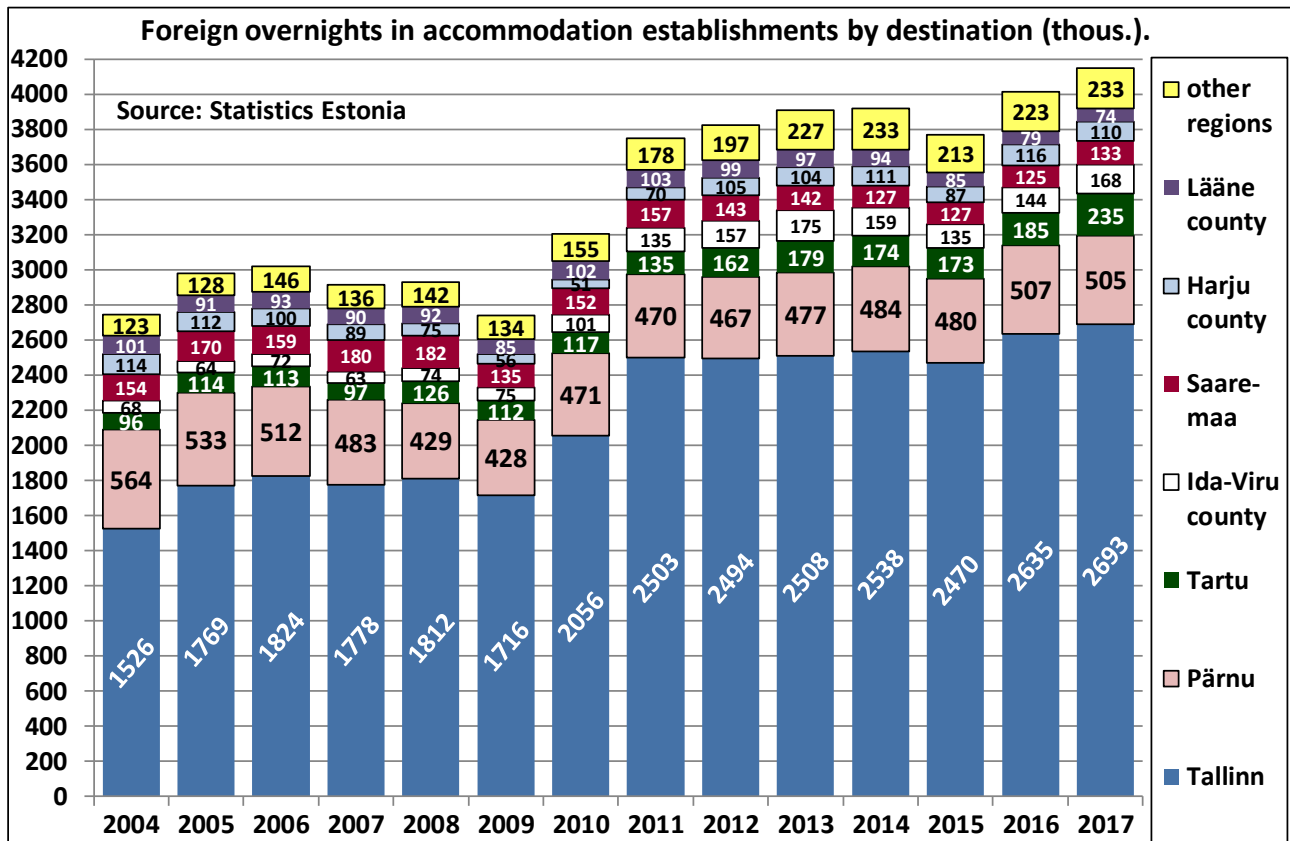












Arrivals and overnights in all accommodation establishments of Estonia by country of residence. Source: www.stat.ee.

	Arrivals in accommodation establishments					Year on year change				
	2013	2014	2015	2016	2017	2015/14	2016/15	2017/16	2016/15	2017/16
total	2 980 865	3 087 070	3 112 143	3 324 914	3 544 932	25 073	212 771	220 018	6,8%	6,6%
domestic	1 040 735	1 103 755	1 182 979	1 268 388	1 388 785	79 224	85 409	120 397	7,2%	9,5%
foreign	1 940 130	1 983 315	1 929 164	2 056 526	2 156 147	-54 151	127 362	99 621	6,6%	4,8%
Finland	894 504	915 540	907 052	951 025	916 241	-8 488	43 973	-34 784	5%	-4%
Russia	304 644	275 405	186 061	200 972	238 636	-89 344	14 911	37 664	8%	19%
Latvia	105 480	112 703	127 864	142 043	161 250	15 161	14 179	19 207	11%	14%
Germany	101 596	112 877	116 088	125 942	125 660	3 211	9 854	-282	8%	-0,2%
Sweden	74 313	71 963	71 087	74 415	73 296	-876	3 328	-1 119	5%	-2%
Lithuania	52 201	52 522	54 743	61 111	64 369	2 221	6 368	3 258	12%	5%
UK	43 109	46 189	48 061	48 733	58 402	1 872	672	9 669	1%	20%
USA	27 442	32 261	44 202	37 865	38 381	11 941	-6 337	516	-14%	1%
Spain	22 926	25 929	27 665	32 194	36 107	1 736	4 529	3 913	16%	12%
Norway	36 918	36 272	37 064	37 725	35 784	792	661	-1 941	2%	-5%
Italy	26 506	26 968	29 521	33 508	34 657	2 553	3 987	1 149	14%	3%
France	22 780	24 058	24 718	28 605	33 767	660	3 887	5 162	16%	18%
Poland	26 001	25 652	22 728	27 237	29 527	-2 924	4 509	2 290	20%	8%
Japan	10 768	17 303	22 865	23 953	28 831	5 562	1 088	4 878	5%	20%
Holland	16 358	16 543	17 315	21 005	21 870	772	3 690	865	21%	4%
China	7 806	11 689	12 027	14 167	19 698	338	2 140	5 531	18%	39%
Denmark	11 900	11 729	14 202	15 236	15 964	2 473	1 034	728	7%	5%

	Overnights in accommodation establishments					Year on year change				
	2013	2014	2015	2016	2017	2015/14	2016/15	2017/16	2016/15	2017/16
total	5 734 033	5 809 464	5 781 870	6 228 128	6 509 299	-27 594	446 258	281 171	7,7%	4,5%
domestic	1 824 707	1 890 165	2 011 663	2 213 547	2 358 880	121 498	201 884	145 333	10,0%	6,6%
foreign	3 909 326	3 919 299	3 770 207	4 014 581	4 150 419	-149 092	244 374	135 838	6,5%	3,4%
Finland	1 691 035	1 689 115	1 676 762	1 766 623	1 695 227	-12 353	89 861	-71 396	5%	-4%
Russia	679 343	613 868	393 805	413 292	482 948	-220 063	19 487	69 656	5%	17%
Germany	210 955	242 102	241 400	269 673	263 413	-702	28 273	-6 260	12%	-2%
Latvia	158 031	170 279	195 649	218 764	243 509	25 370	23 115	24 745	12%	11%
Sweden	159 813	149 721	144 504	152 080	145 394	-5 217	7 576	-6 686	5%	-4%
UK	99 742	101 394	106 364	107 480	128 076	4 970	1 116	20 596	1%	19%
Lithuania	93 784	93 359	89 860	110 728	105 530	-3 499	20 868	-5 198	23%	-5%
Spain	54 633	60 417	79 919	74 019	97 688	19 502	-5 900	23 669	-7%	32%
USA	63 690	74 249	110 063	92 904	84 341	35 814	-17 159	-8 563	-16%	-9%
Norway	91 451	86 999	86 494	90 418	81 062	-505	3 924	-9 356	5%	-10%
Italy	62 700	63 563	68 745	76 073	75 480	5 182	7 328	-593	11%	-1%
France	52 368	53 531	54 744	60 225	71 001	1 213	5 481	10 776	10%	18%
Poland	60 788	54 292	45 743	58 159	57 701	-8 549	12 416	-458	27%	-1%
Japan	19 272	29 477	35 837	38 831	45 065	6 360	2 994	6 234	8%	16%
Holland	34 117	35 343	36 281	43 250	44 891	938	6 969	1 641	19%	4%
Denmark	24 174	24 646	27 588	29 309	30 590	2 942	1 721	1 281	6%	4%
China	15 339	18 842	19 817	24 609	30 210	975	4 792	5 601	24%	23%