

# Tourism in Estonia in 2020

visit  
estonia

Compiled by Visit Estonia  
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# Data from accommodation establishments in 2020 – key facts

- **In 2020, 1.97 million foreign and domestic tourists stayed in the accommodation establishments in Estonia** (down 48% on 2019), **spending 3.67 million overnights** (down 47% compared to 2019).
- The number of tourists and overnights decreased by 1.8 million and 3.3 million, respectively.
- The number of **foreign tourists** amounted to 676,000 (down 70% on 2019), their overnights amounted to 1.4 million (68% down). **In 2020, foreign overnights fell below the level seen in 2000.** In 2000, the number of foreign overnights was 1.6 million and in 1999 it was 1.3 million.
- **Latvia** showed the smallest relative decline among foreign markets (with overnights decreasing by 42%). Overnights from **Lithuania** and **Finland** decreased by 46% and 65%, respectively. **Russia** showed a decline of 70% in overnights. Tourism from **Germany** and the **UK** decreased by 72%.
- 1.3 million **domestic tourists** spent 2.27 million nights in accommodation establishments, decreasing by 16% and 12%, respectively.
- Until 2019, domestic overnights reached new records for 7 consecutive years. In 2020, domestic overnights decreased somewhat below the level of 2017.

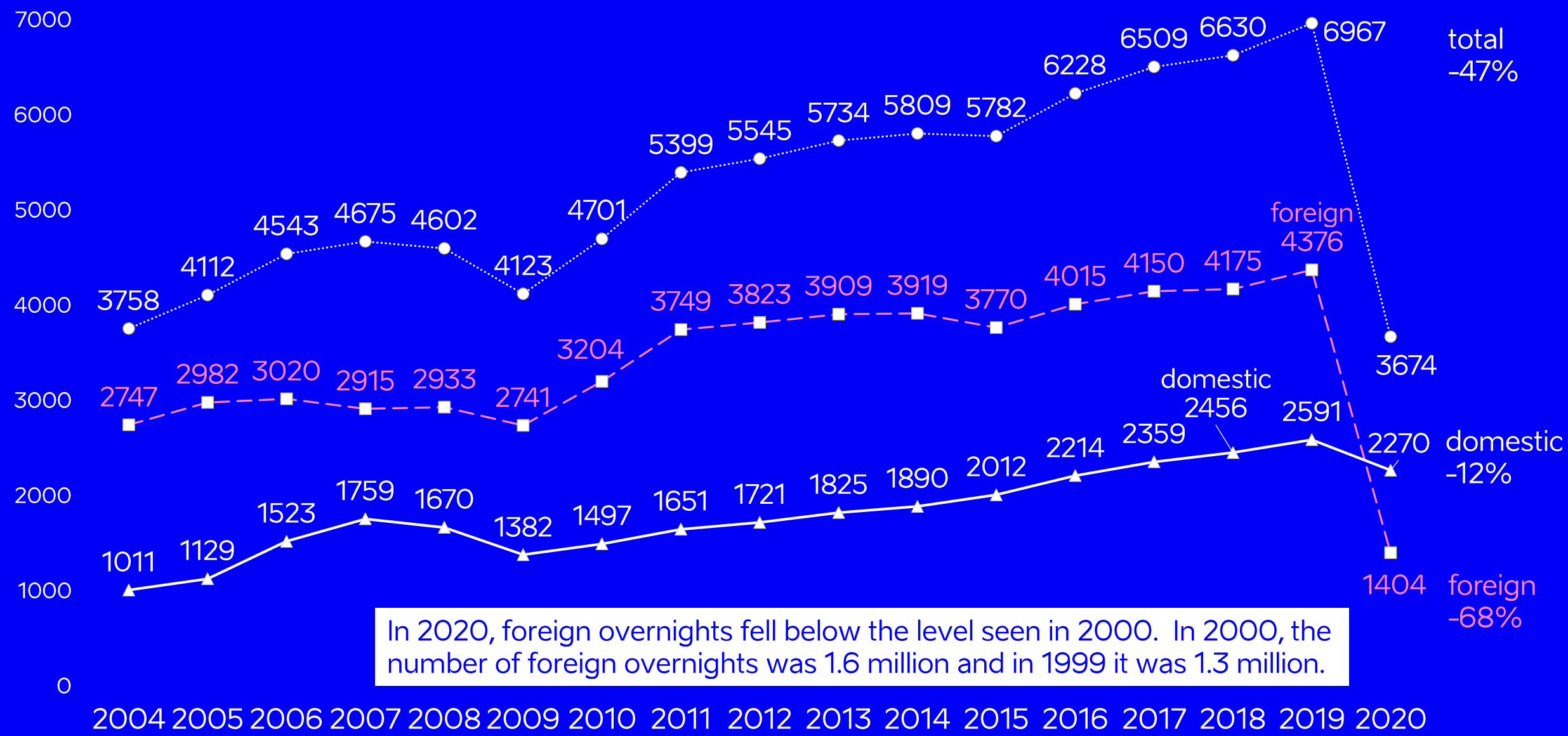
# Data from accommodation establishments in 2020– inbound tourism (1)

- During the first 2 months of 2020, foreign overnights in Estonia reached a new record. Overnights from Finland and Russia showed an especially strong growth: 23% and 16%, respectively.
- **After the near-total shutdown in international tourism from mid-March to mid-May, tourists from Latvia, Lithuania and Finland accounted for the vast majority of inbound tourists for the rest of 2020.**
- Starting from mid-May, tourists from Latvia and Lithuania were allowed to travel to Estonia again. In May and June the recovery was very slow but the demand picked up in July and especially in August (in August, Latvian overnights were up 44% and Lithuanian overnights were up 25% on previous record levels). Pärnu and Saaremaa were especially popular among tourists from both markets.
- Due to the increase in COVID-19 cases, travel restrictions were gradually restored starting from September. According to the decision of the Latvian government, starting from 12 Sept. people travelling from Estonia to Latvia (incl. returning Latvian residents) had to self-isolate for 10 days. This effectively ended holiday travel of Latvian residents to Estonia for the rest of 2020. Starting from 28 Sept., the Estonian government restricted holiday travel from Lithuania.

## Data from accommodation establishments in 2020– inbound tourism (2)

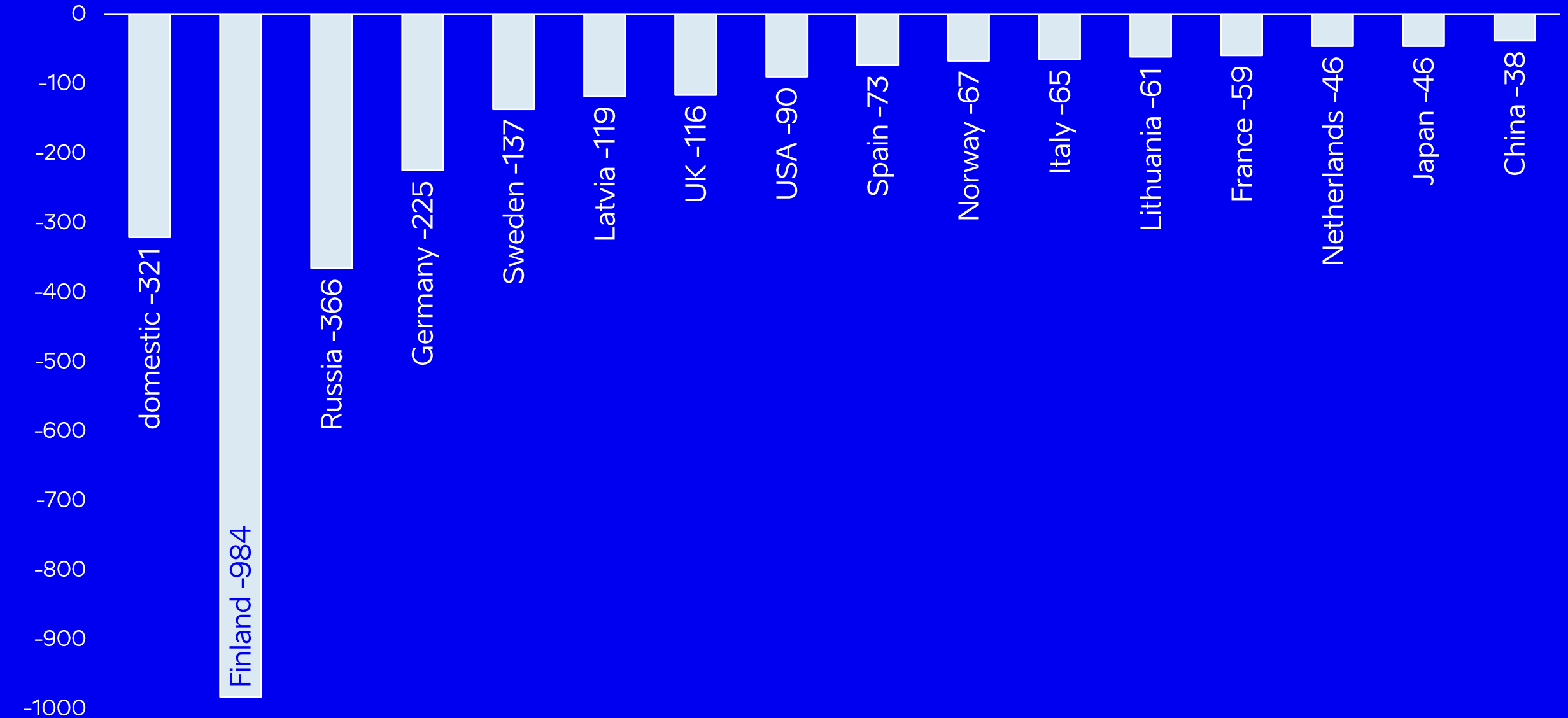
- Starting from 1 June 2020, EU, Schengen area and UK residents were allowed to travel to Estonia again. However, those arriving from the European countries where the COVID-19 infection rate was higher than 15 (per 100,000 inhabitants), had to self-isolate for two weeks on arrival. For example, this meant that the compulsory quarantine applied to people arriving from Sweden for the rest of 2020.
- At the same time, most European countries (incl. Finland) advised their citizens against all non-essential travel abroad until mid-June. Therefore, demand from Finland started to pick up very slowly only from mid-June. In June, Finnish overnights were down 76%, in July and August over 40% on 2019. In Tallinn, the decline in Finnish overnights was somewhat smaller than in Estonia in general.
- Starting from 28 Sept., the Finnish government re-introduced self-isolation requirement for people arriving from Estonia to Finland. At the same time, Estonia had gradually extended quarantine requirements for inhabitants of most other European countries during August and September. Consequently, during the last months of 2020, inbound tourism was only restricted to essential travel.

# overnights in accommodation establishments in Estonia, 2004–2020 (thous)



In 2020, foreign overnights fell below the level seen in 2000. In 2000, the number of foreign overnights was 1.6 million and in 1999 it was 1.3 million.

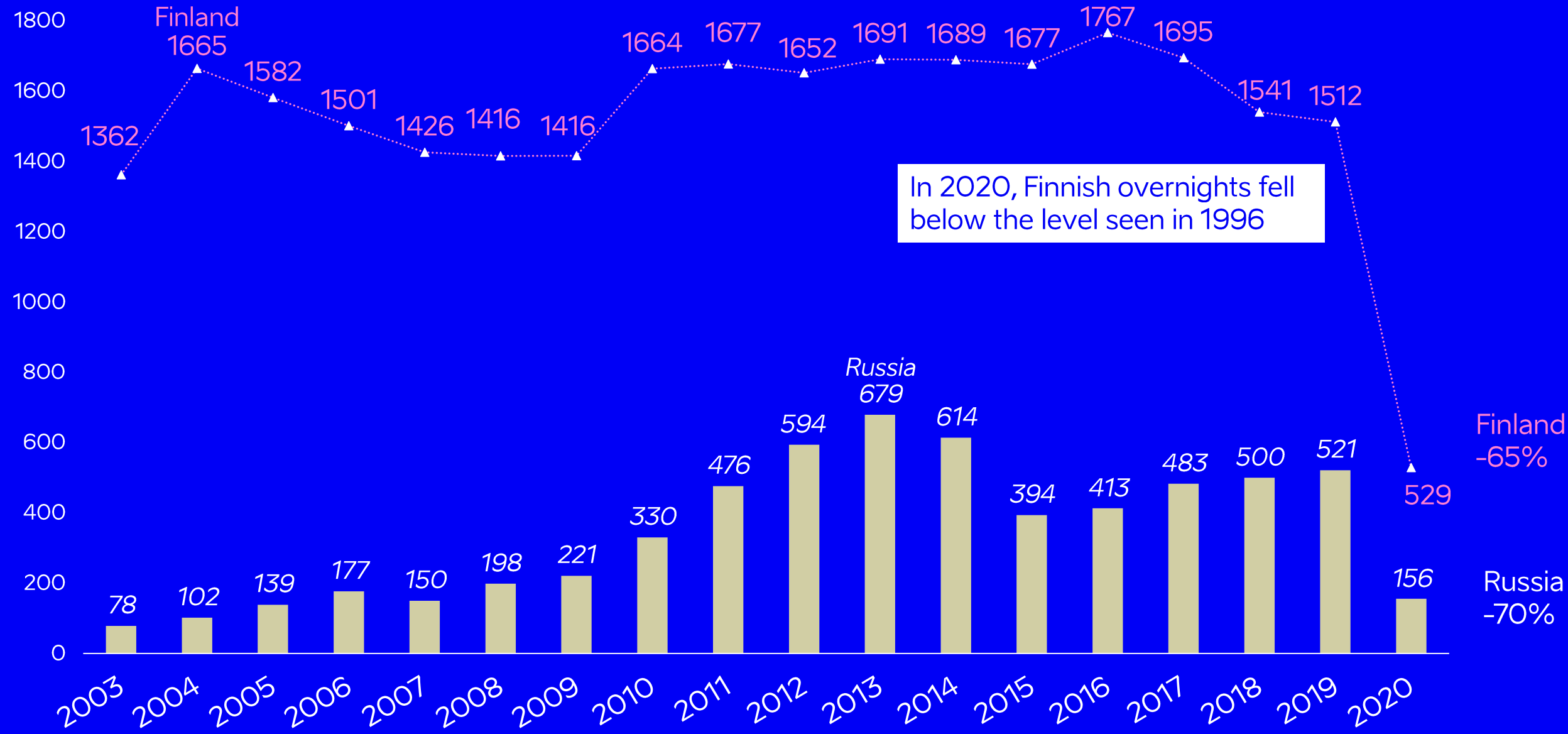
# change in overnights in accommodation establishments, 2020/2019 (in thousands)



Source: Statistics Estonia.

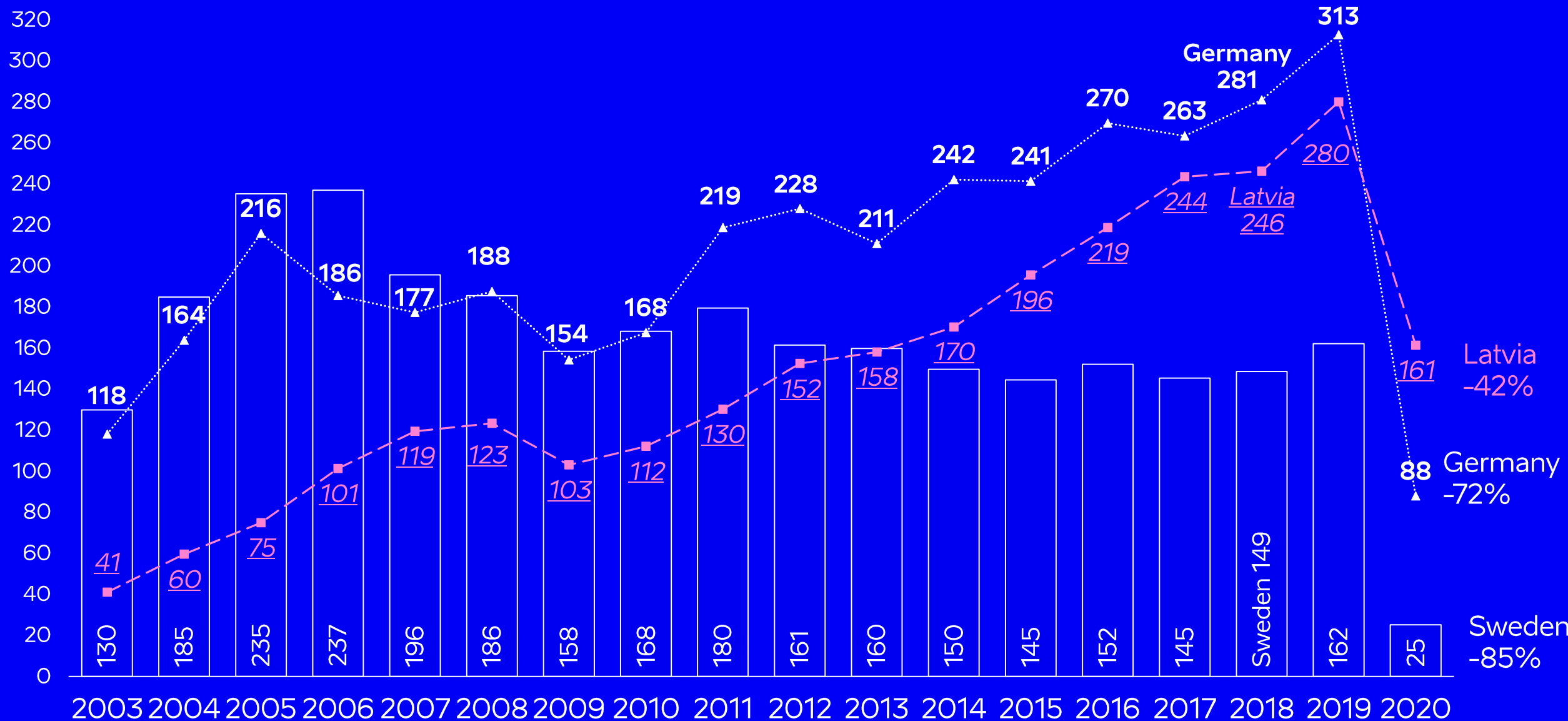
The figure shows y-o-y change in absolute figures.

# overnights in accommodation establishments in Estonia (thousands)



Source: Statistics Estonia

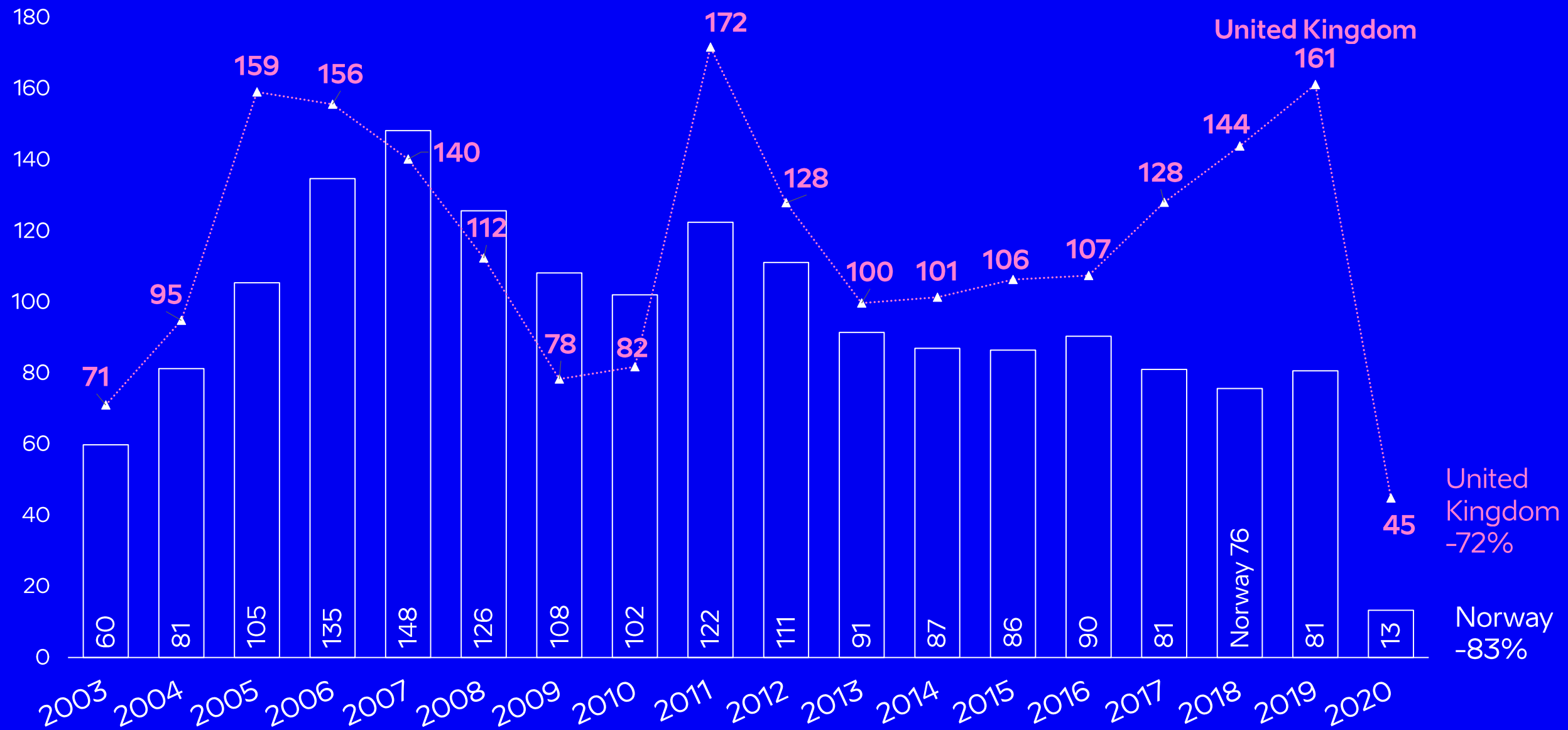
# overnights in accommodation establishments in Estonia (thousands)



Source: Statistics Estonia

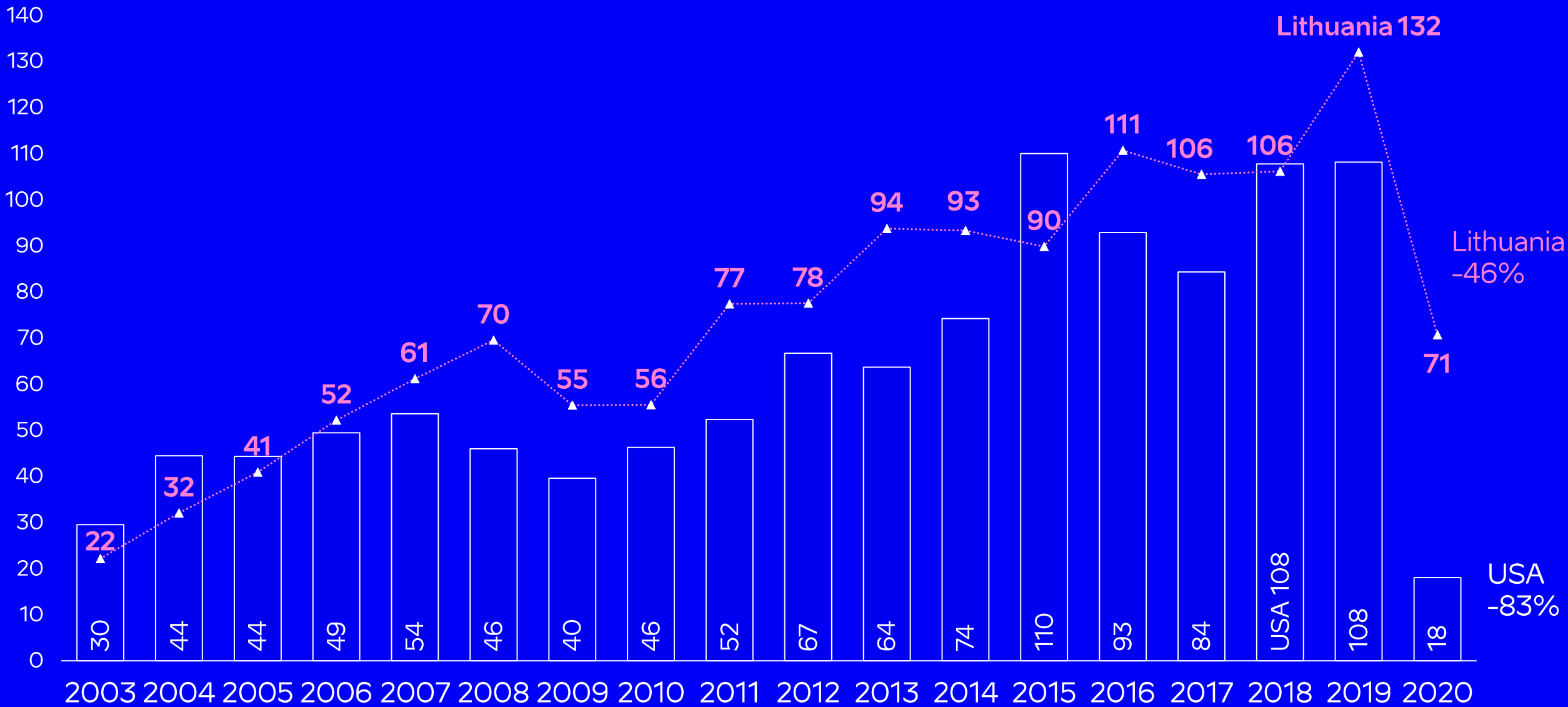


# overnights in accommodation establishments in Estonia (thousands)



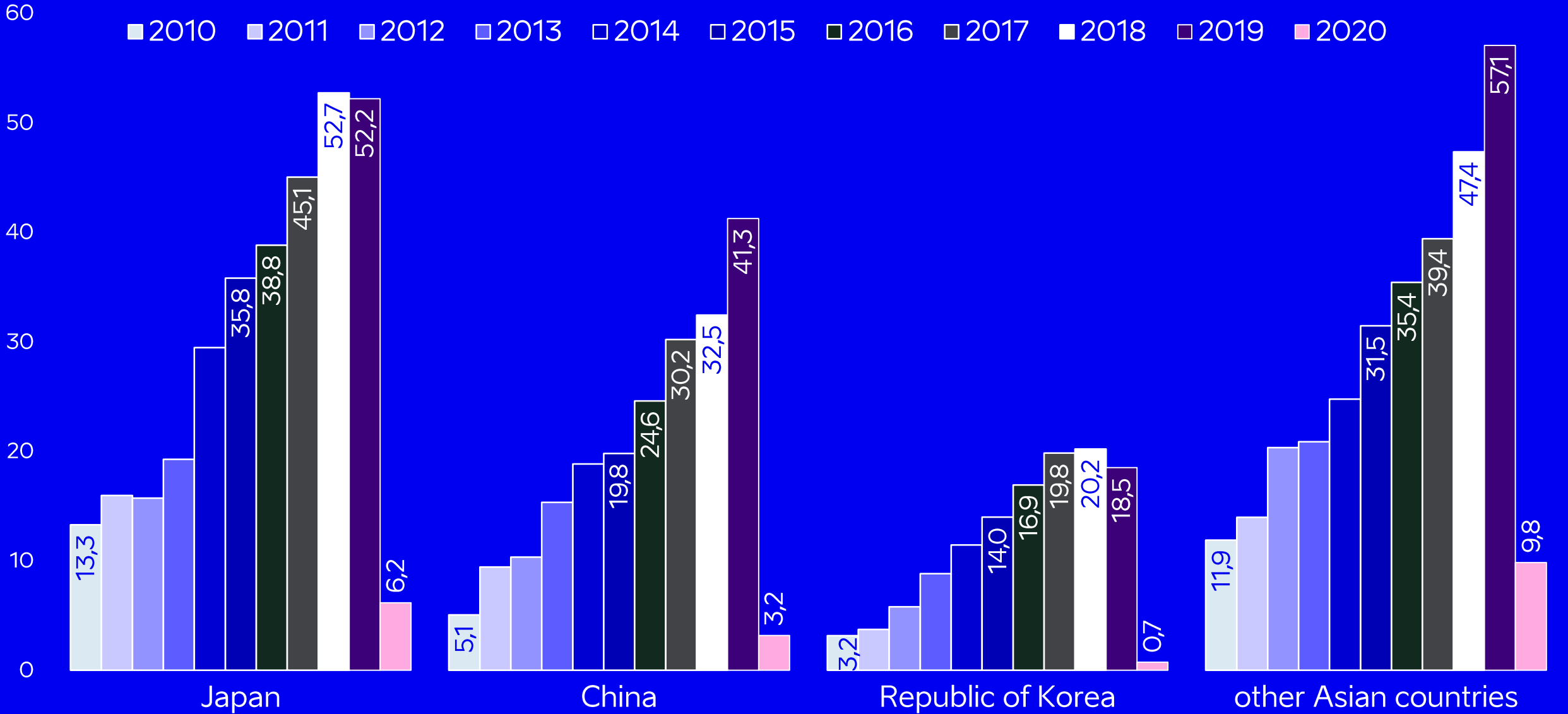
Source: Statistics Estonia

# overnights in accommodation establishments in Estonia (thousands)



Source: Statistics Estonia

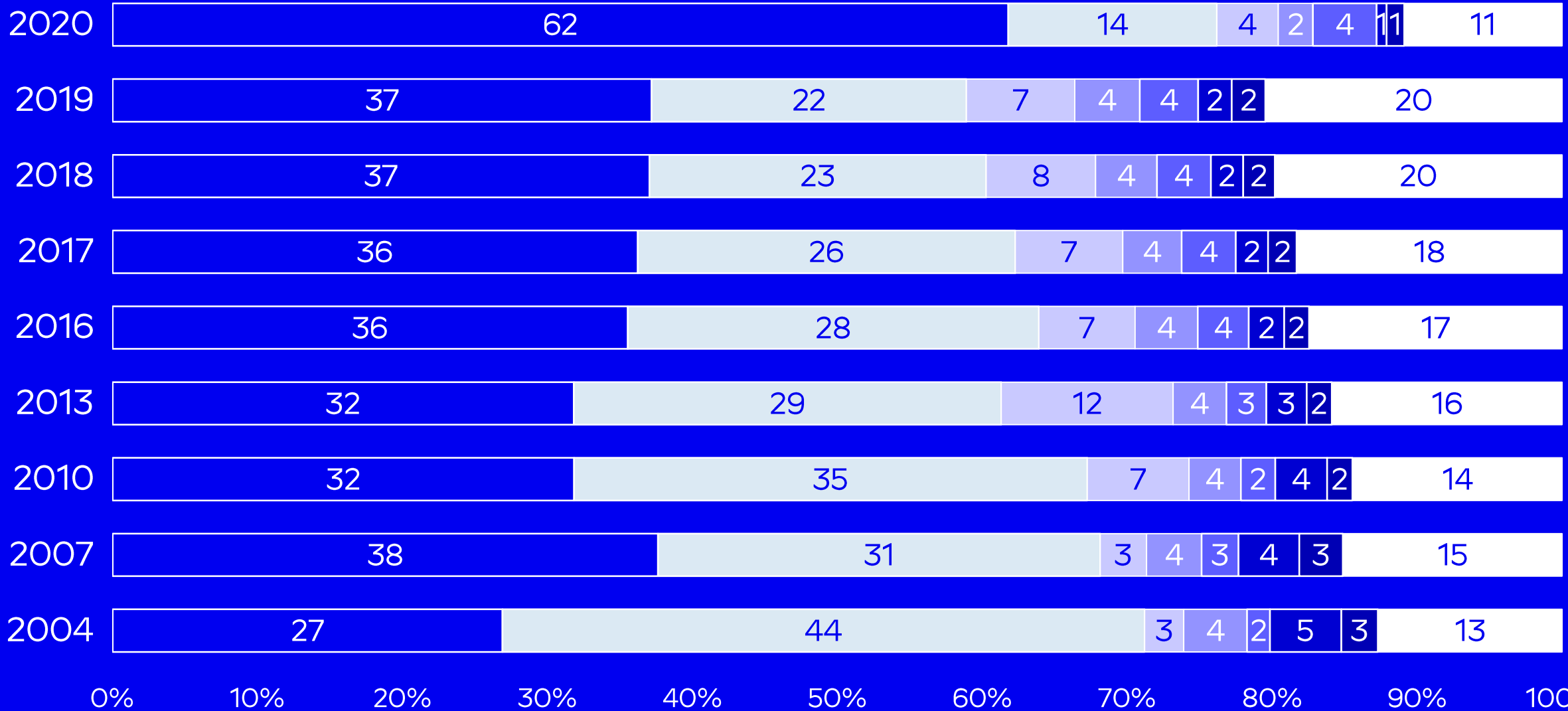
# overnights in accommodation establishments in Estonia (thousands)



Source: Statistics Estonia

# overnights in accommodation establishments in Estonia (%)

■ domestic 
 ■ Finland 
 ■ Russia 
 ■ Germany 
 ■ Latvia 
 ■ Sweden 
 ■ UK 
 ■ other

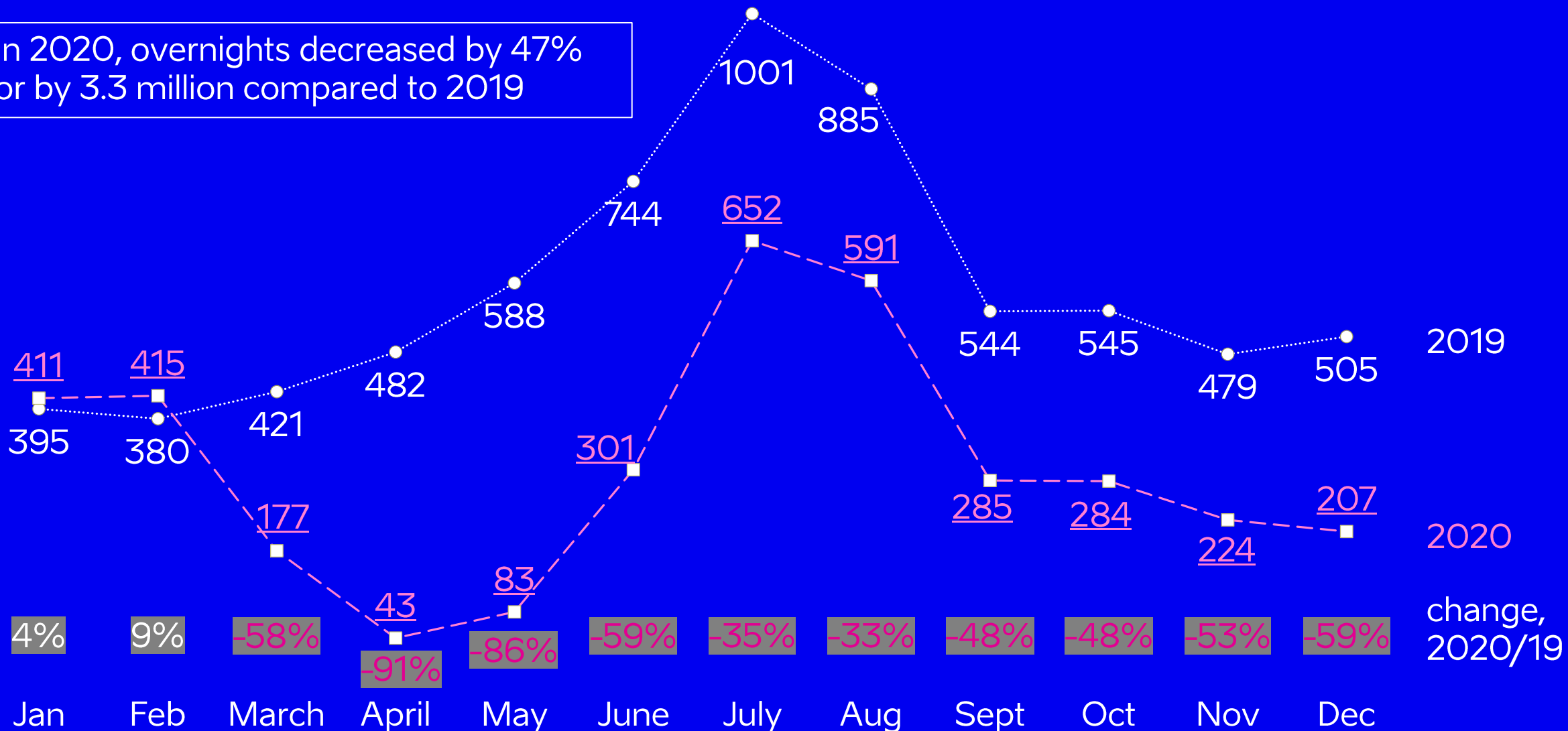


0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



# all overnights in accommodation establishments in Estonia, 2019–2020 (thous)

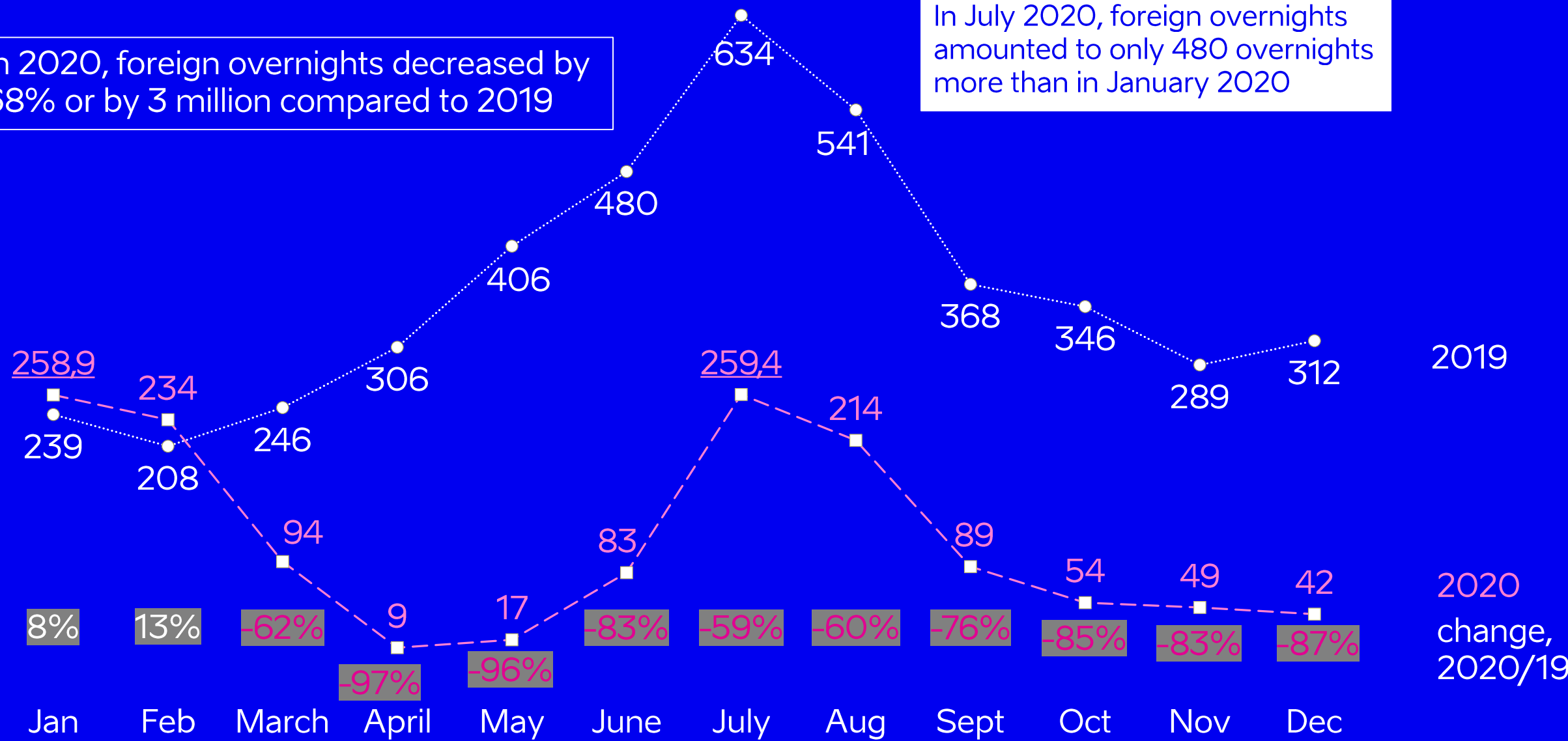
In 2020, overnights decreased by 47% or by 3.3 million compared to 2019



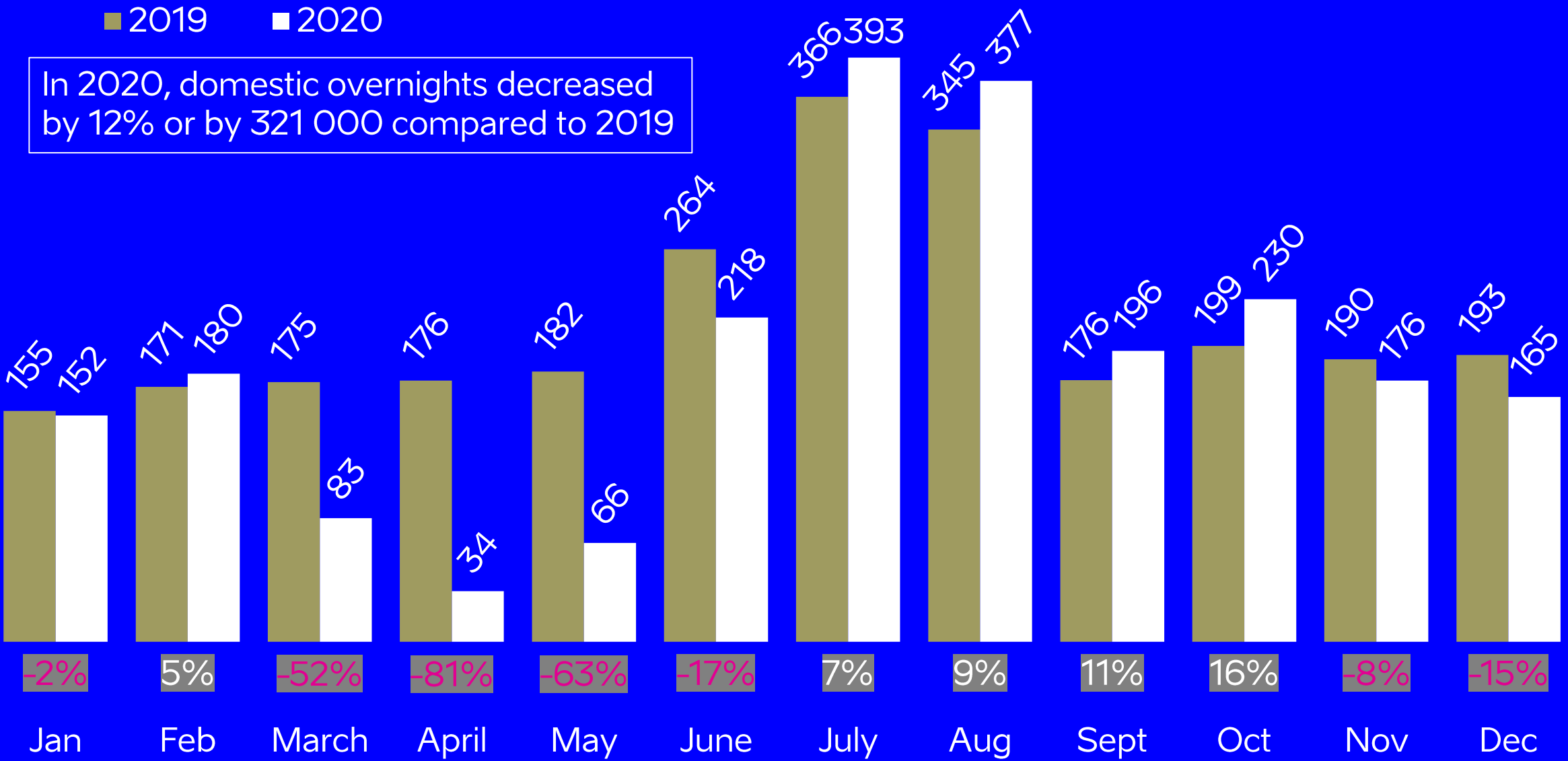
# foreign overnights in accommodation establishments, 2019–2020 (thous)

In 2020, foreign overnights decreased by 68% or by 3 million compared to 2019

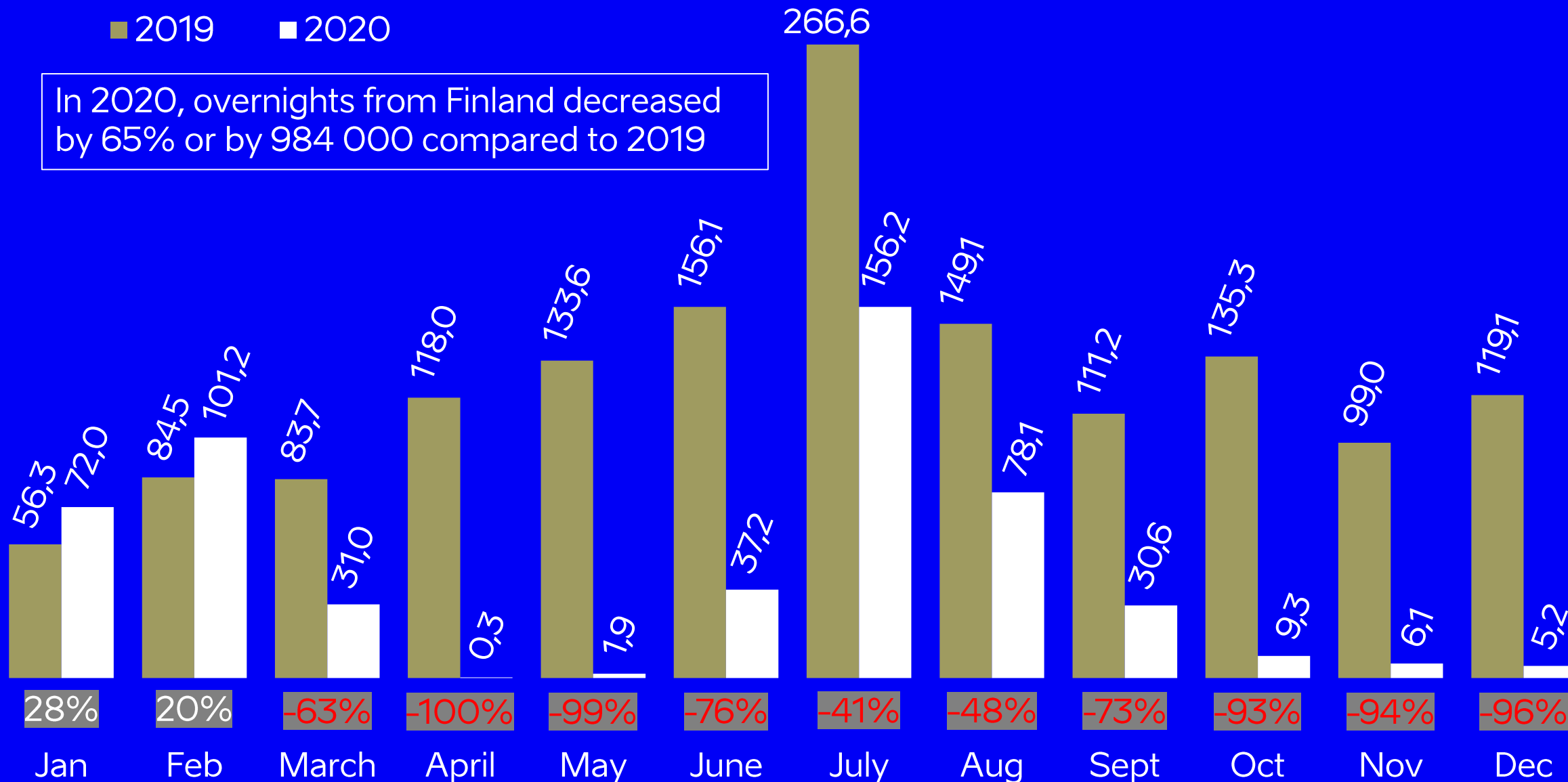
In July 2020, foreign overnights amounted to only 480 overnights more than in January 2020



# domestic overnights in accommodation establishments, 2019–2020 (thous)



# Finnish overnights in accommodation establishments, 2019–2020 (thous)



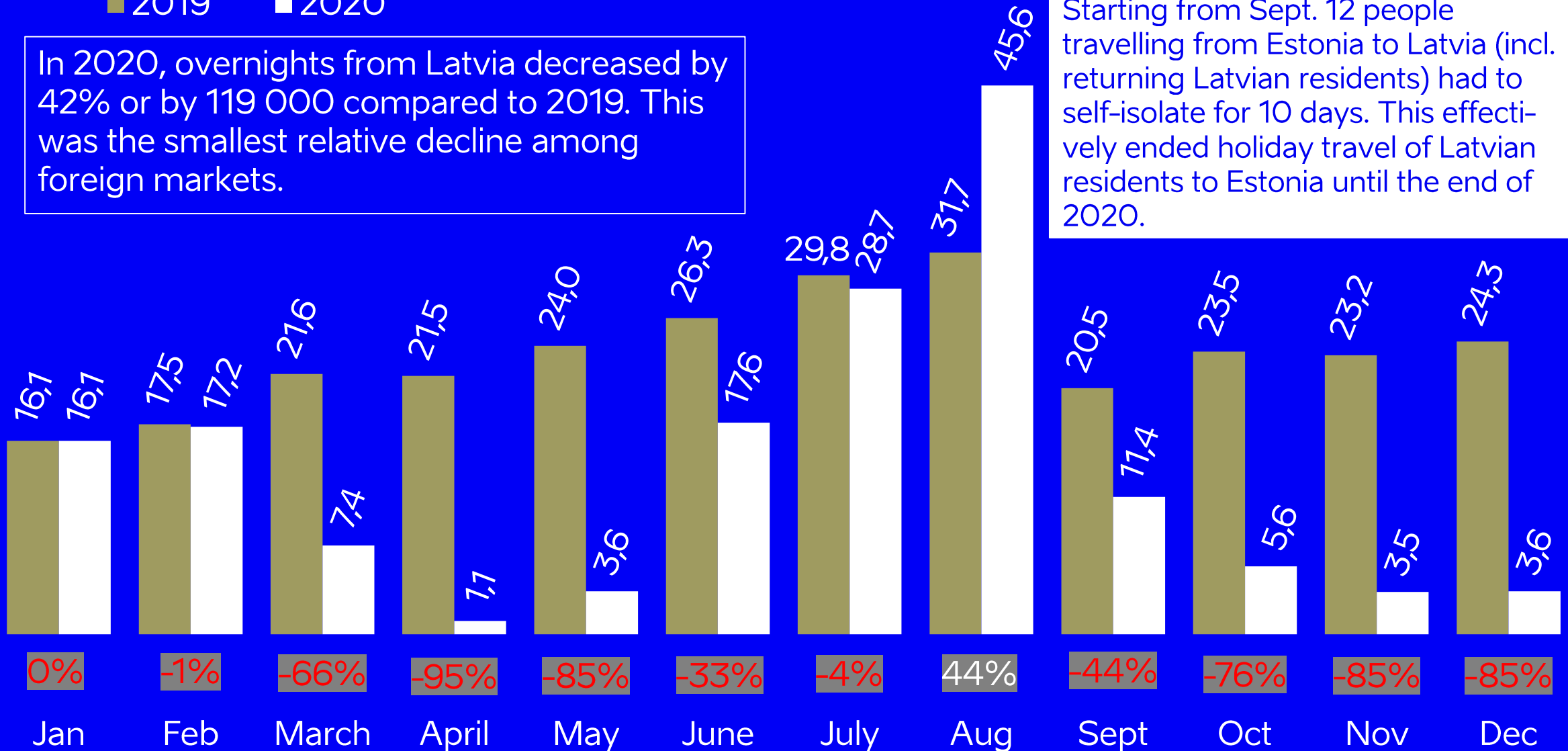


# Latvian overnights in accommodation establishments, 2019–2020 (thous)

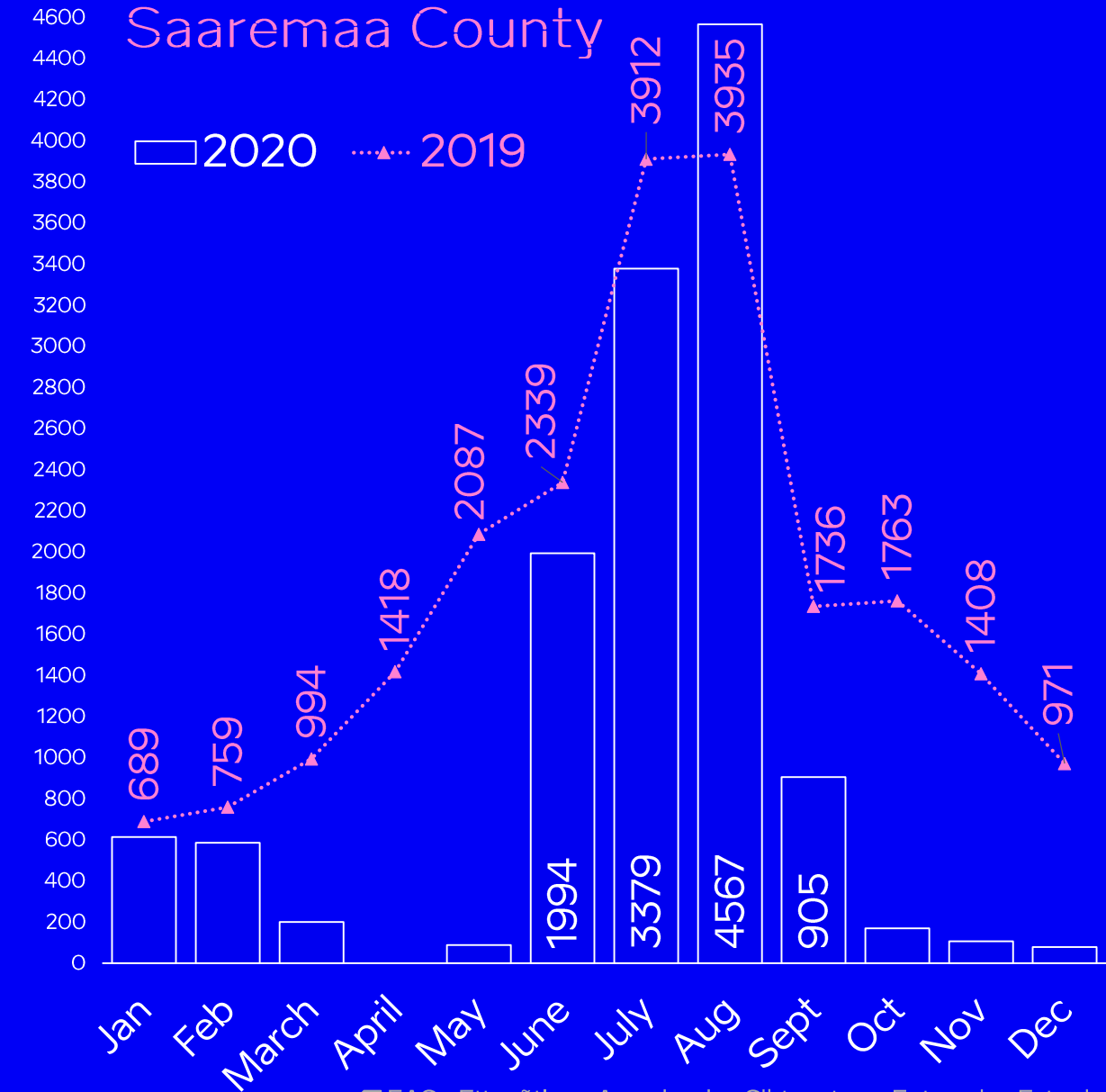
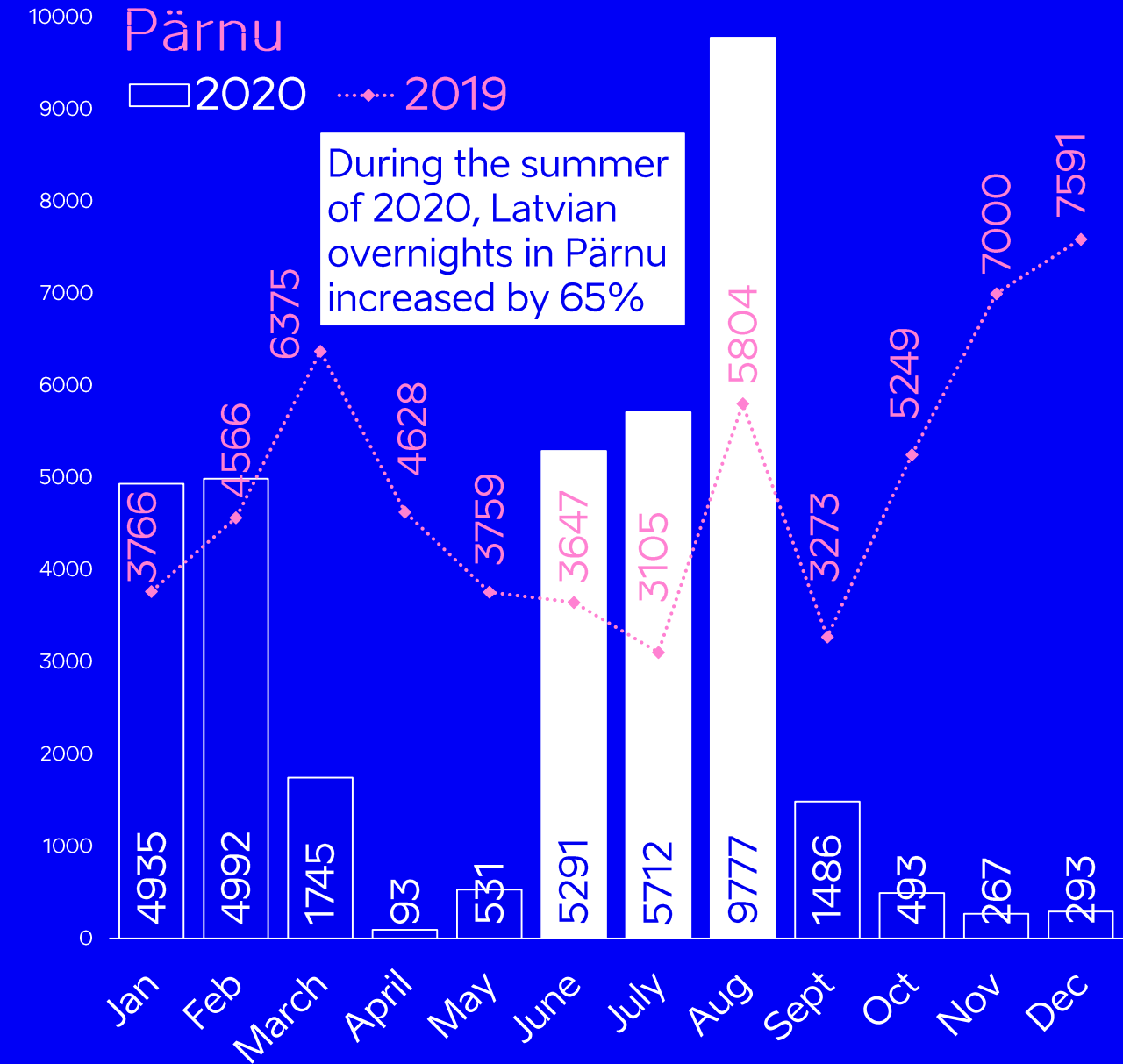
■ 2019 ■ 2020

In 2020, overnights from Latvia decreased by 42% or by 119 000 compared to 2019. This was the smallest relative decline among foreign markets.

Starting from Sept. 12 people travelling from Estonia to Latvia (incl. returning Latvian residents) had to self-isolate for 10 days. This effectively ended holiday travel of Latvian residents to Estonia until the end of 2020.

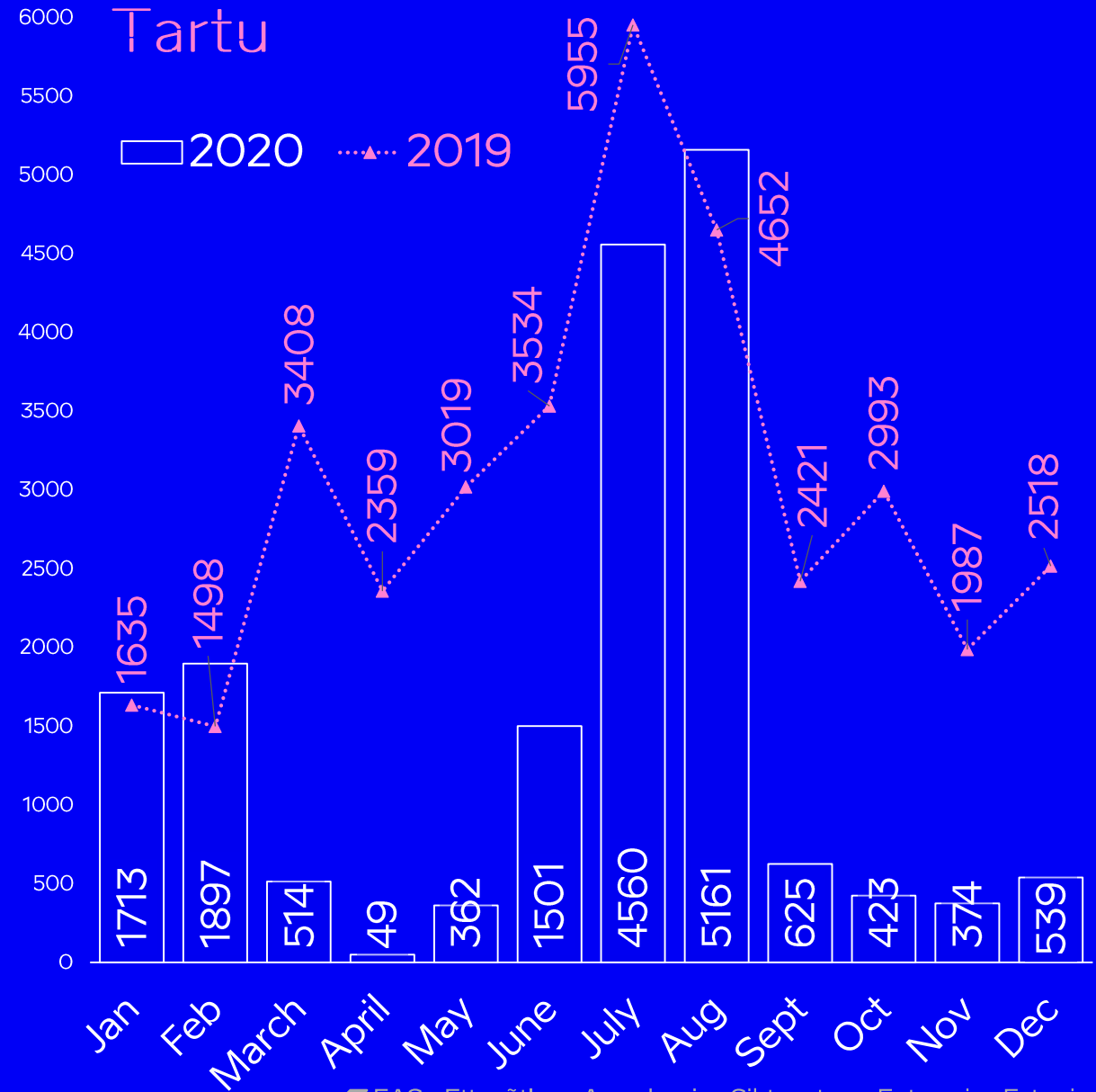
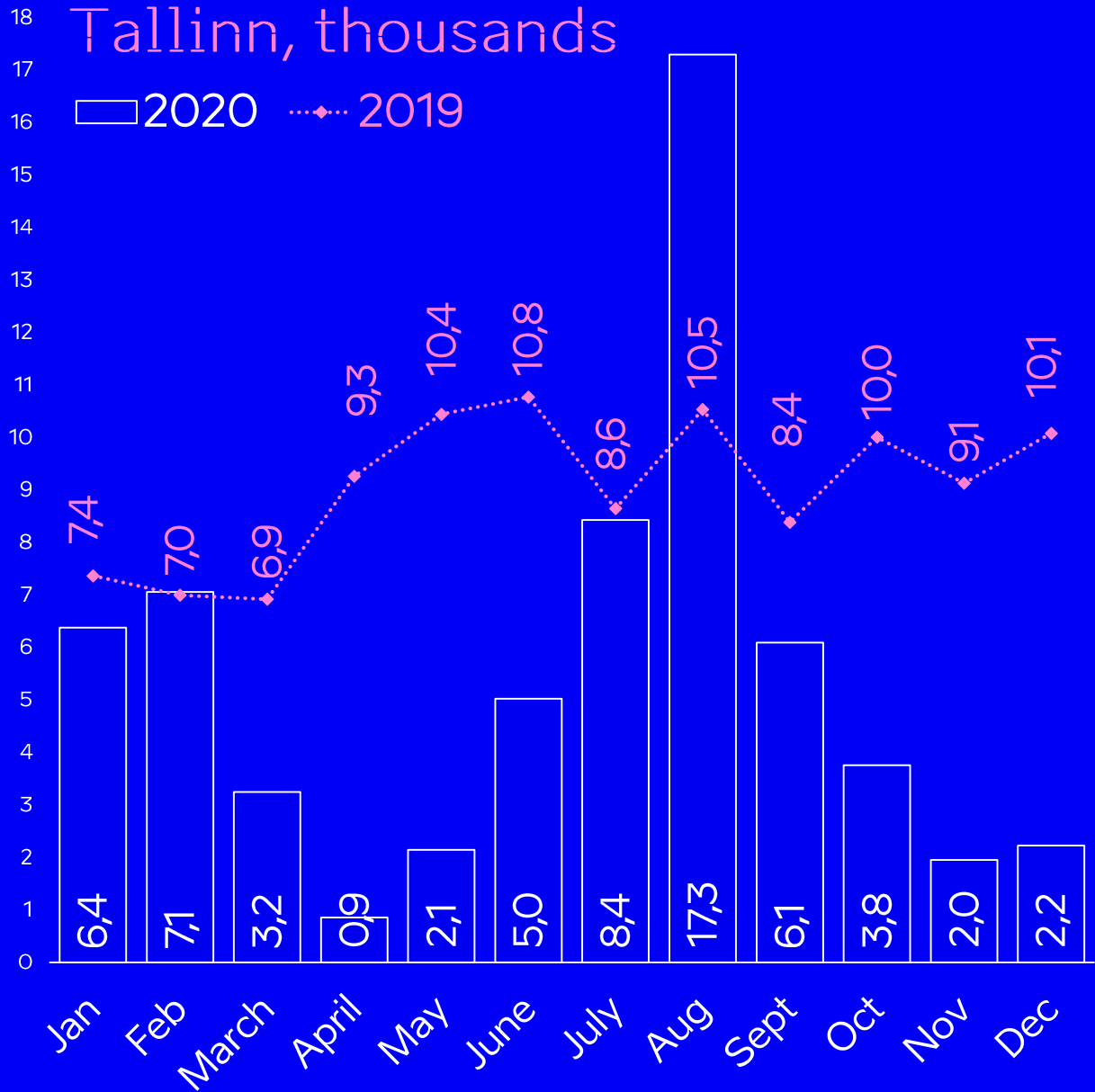


# Latvian overnights in accommodation establishments in Pärnu and Saaremaa County, 2019–20



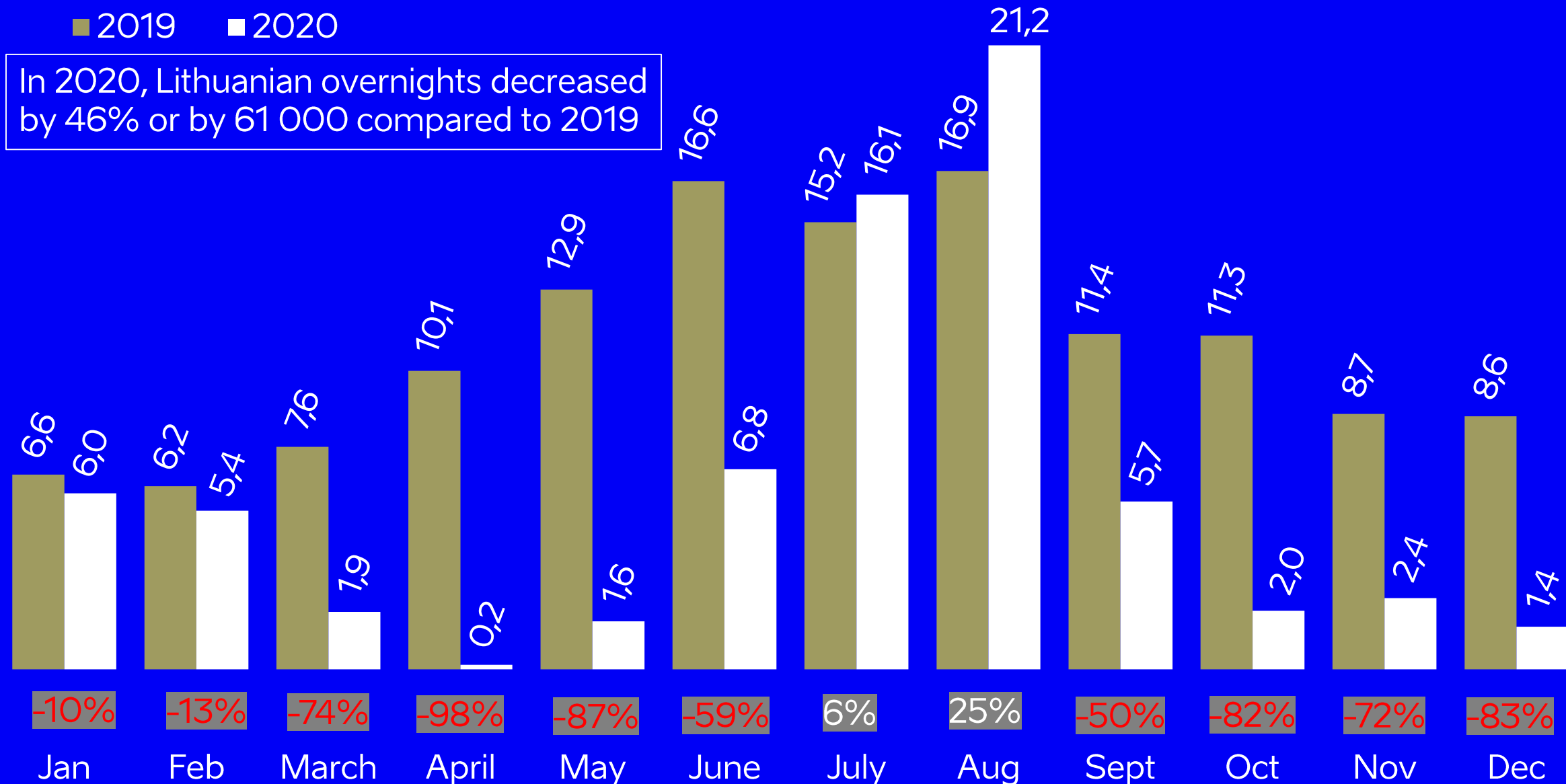
Source: Statistics Estonia

# Latvian overnights in accommodation establishments in Tallinn and Tartu, 2019–2020



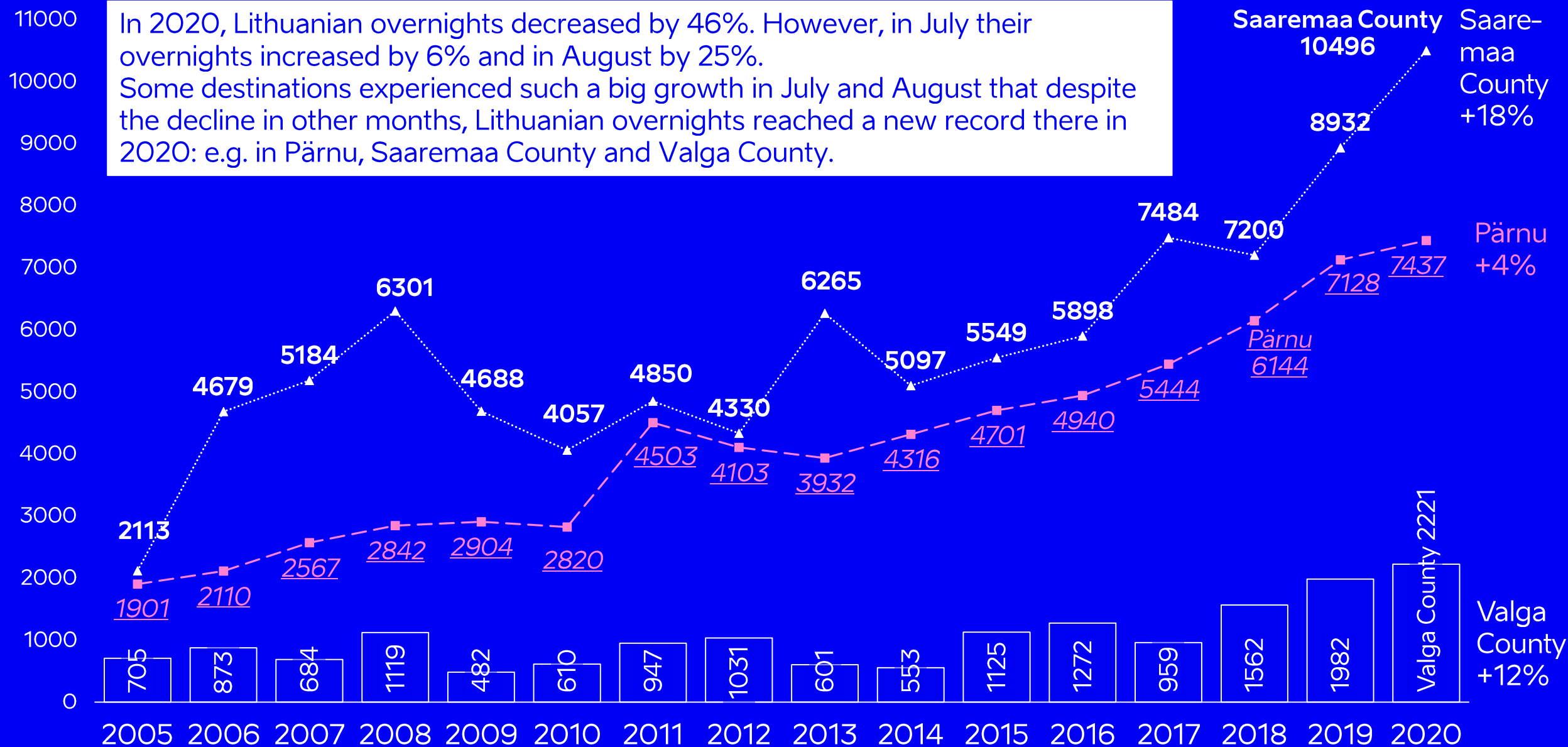
Source: Statistics Estonia

# Lithuanian overnights in accommodation establishments in Estonia, 2019–2020 (thous)

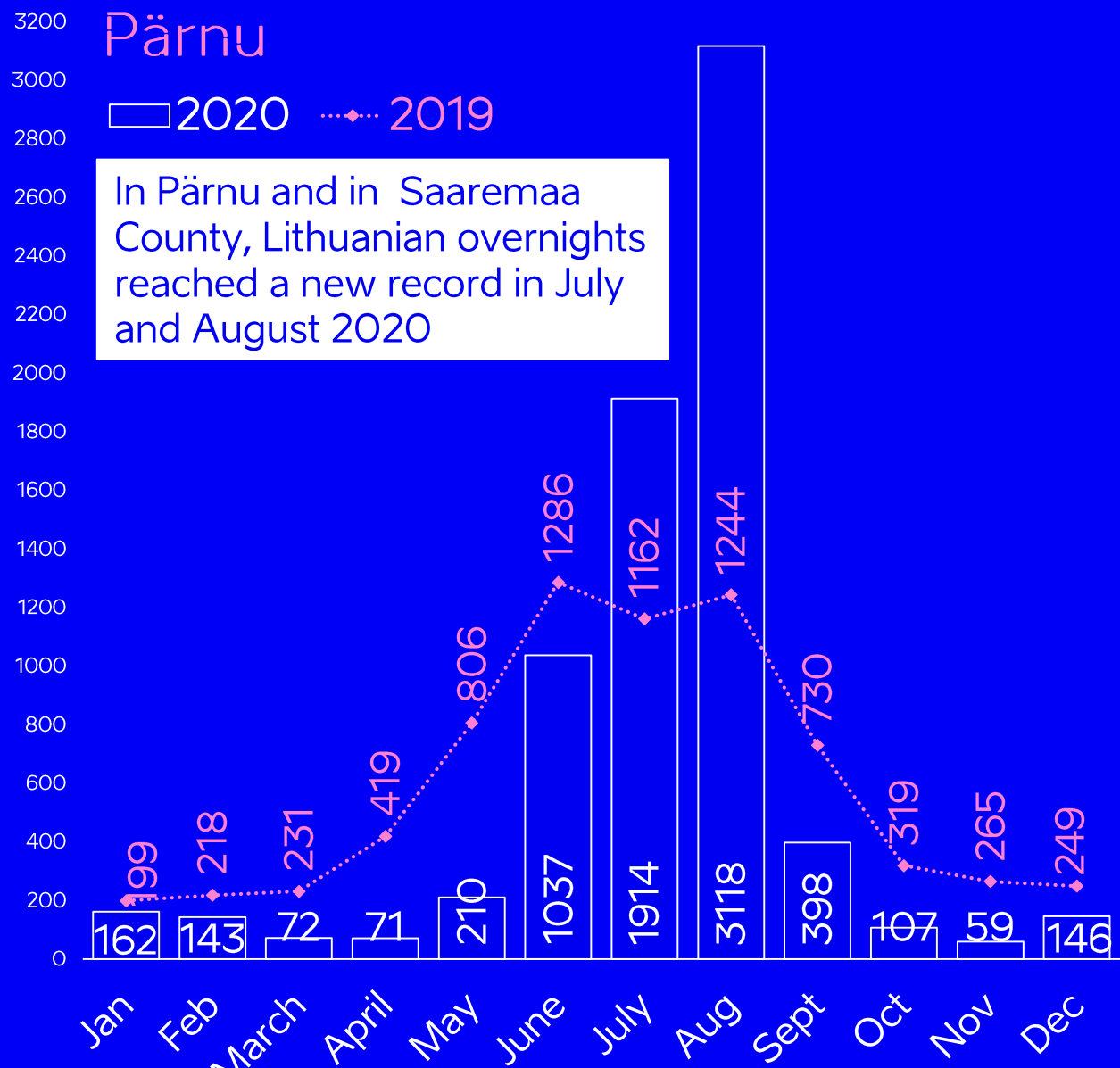




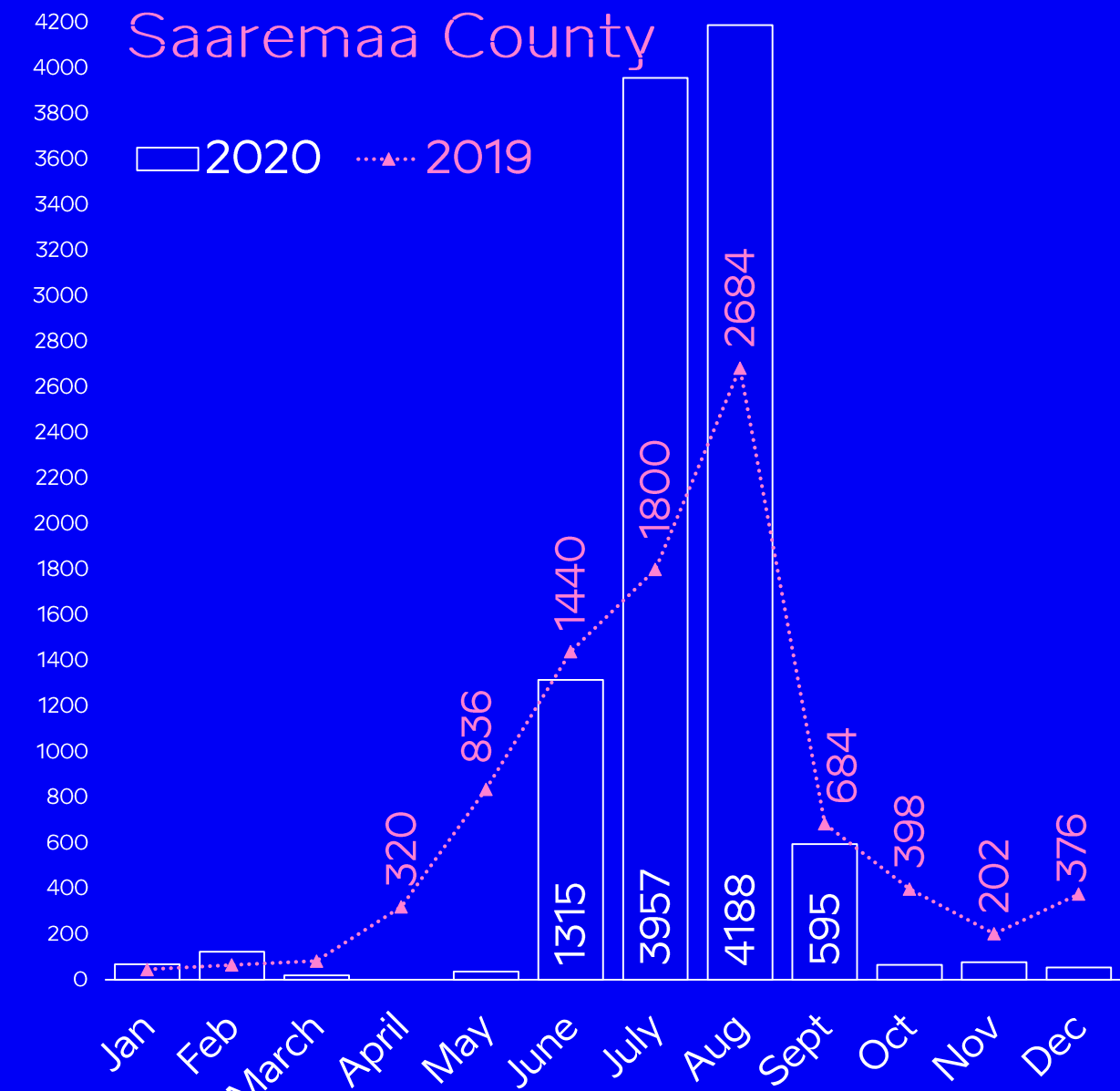
# Lithuanian overnights in accommodation establishments in Estonia, 2005–2020



# Lithuanian overnights in accommodation establishments, 2019–2020

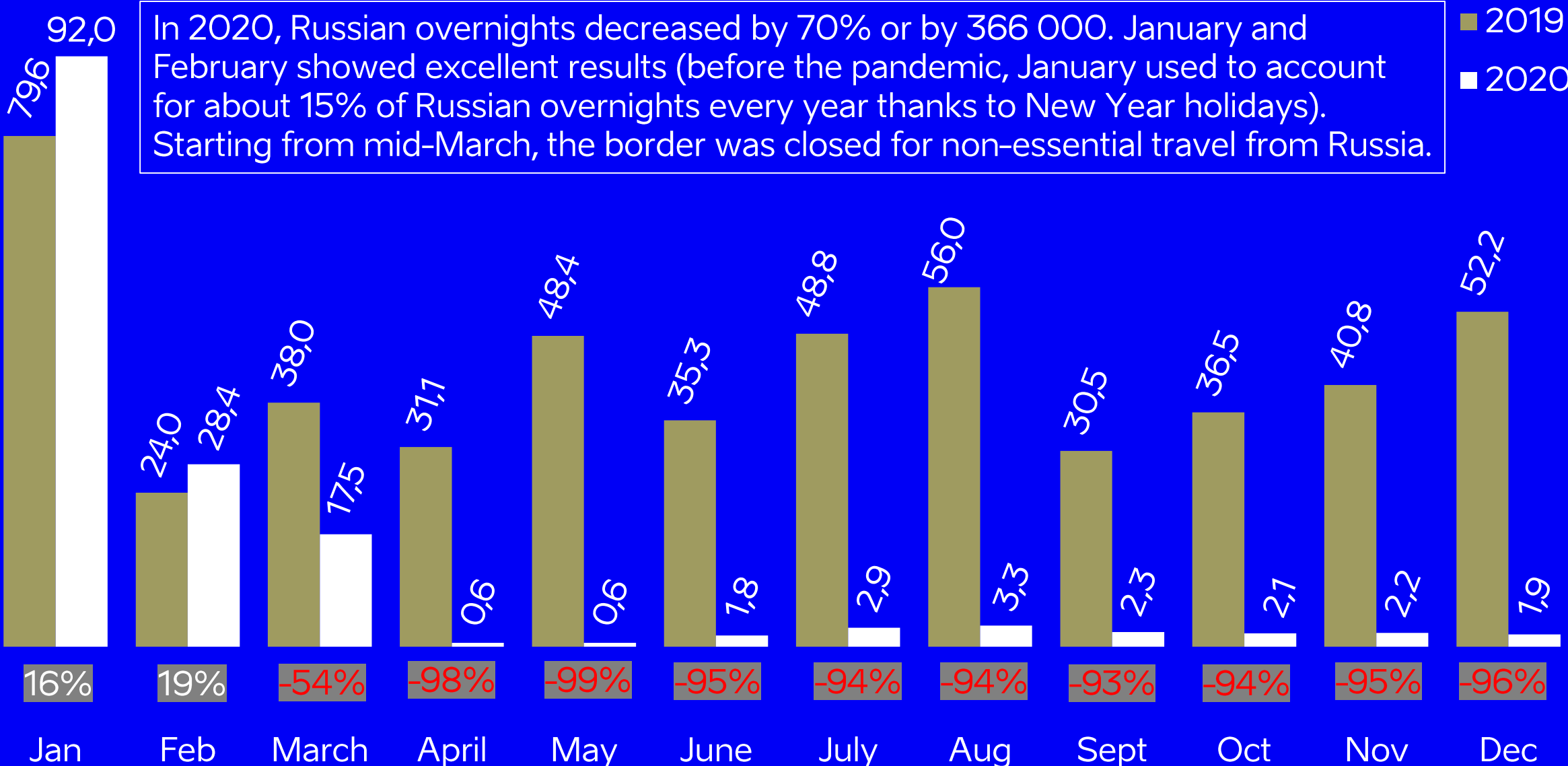


In Pärnu and in Saaremaa County, Lithuanian overnights reached a new record in July and August 2020



Source: Statistics Estonia

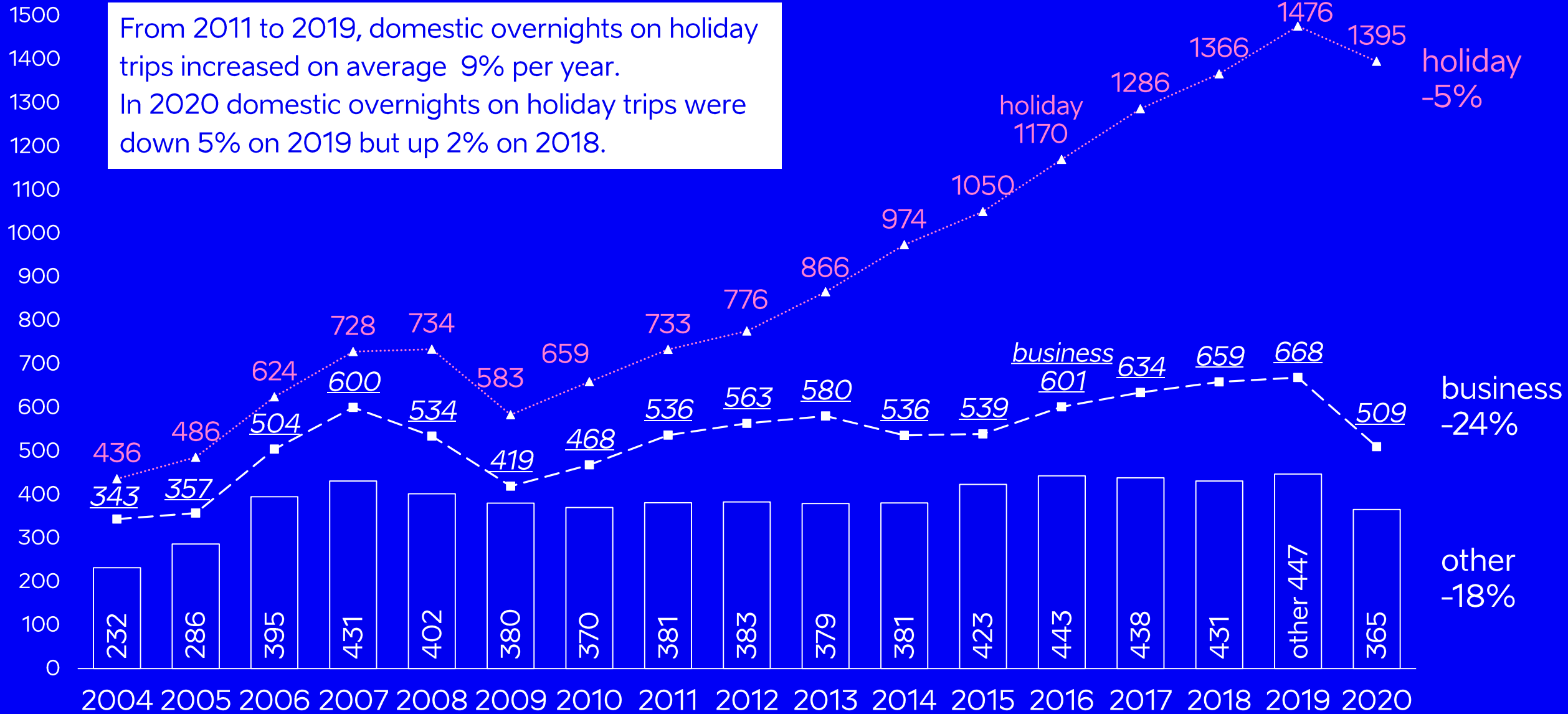
# Russian overnights in accommodation establishments in Estonia, 2019–2020 (thous)



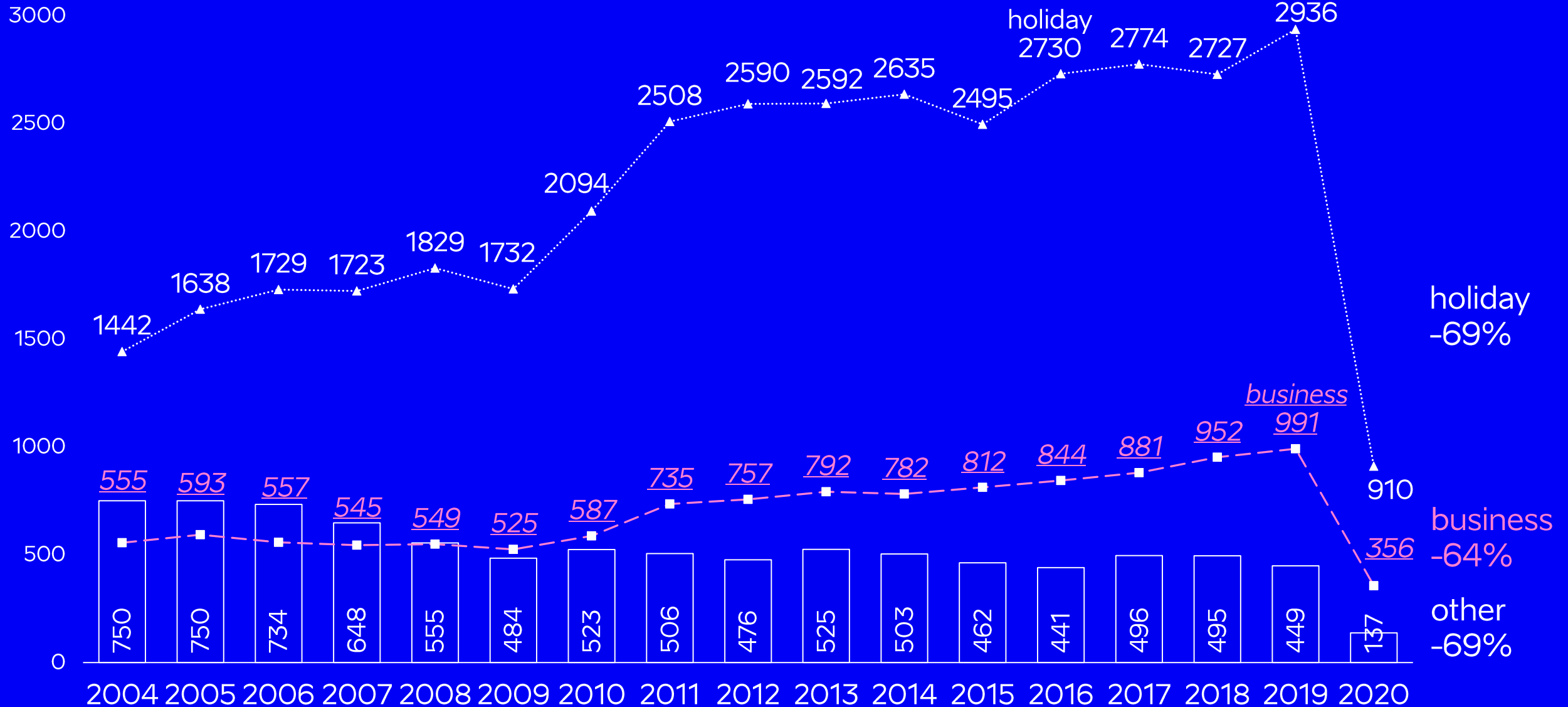
# foreign and domestic overnights by purpose of trip, 2020

- **Holiday trips** accounted for 61% of **domestic overnights**, business trips for 22% and other trips for 16%. In 2019 holiday trips accounted for 57% of domestic overnights.
- In 2020, domestic overnights on **holiday trips** amounted to 1.4 million (-5% or 81,000 down on 2019). This figure decreased due to the first wave of COVID-19 in spring (from March to May domestic overnights on holiday trips decreased by 226,000). From July to November domestic overnights on holiday trips increased by 131,000 but this was not enough to compensate for the decrease in spring.
- In 2020, domestic overnights on **business trips** amounted to 509,500 (24% or 159,000 fewer than in 2019). They decreased throughout the year, although the decrease was bigger during the first wave of COVID-19.
- Holiday trips accounted for 65% of **foreign overnights**, business trips for 25% and other trips for 10%.
- In 2019, holiday trips accounted for 67% and business trips for 23% of foreign overnights.
- Foreign overnights on business trips decreased by 64%, overnights on holiday and other trips by 69%. In absolute figures, the decline in foreign overnights on holiday trips was the biggest: from 2.94 million in 2019 to 910,000 in 2020.

# domestic overnights by purpose of trip, 2004–2020 (thous)



# foreign overnights by purpose of trip, 2004–2020 (thous)



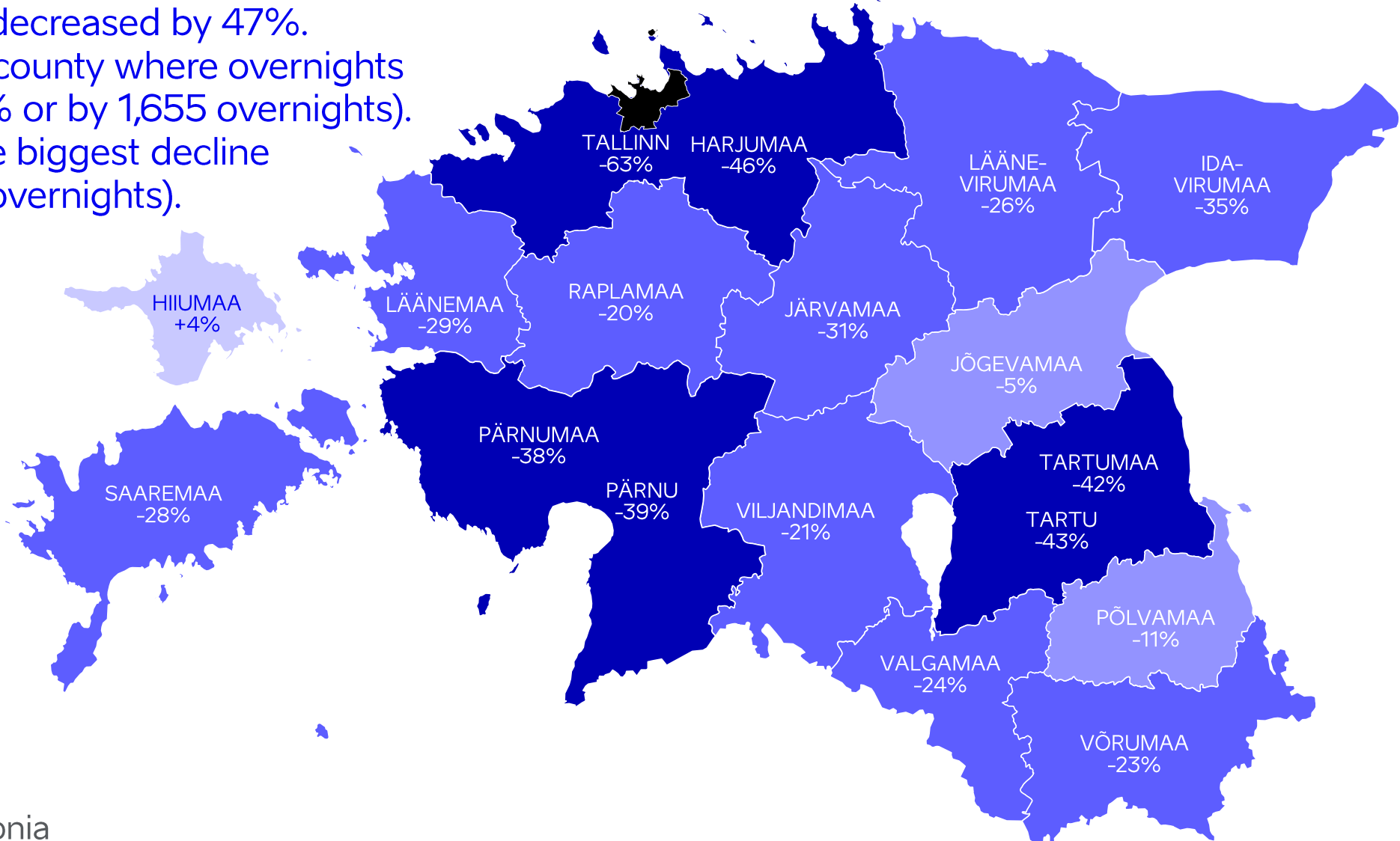
# foreign and domestic overnights by region, 2020

- In 2020, 33% of all (foreign + domestic) overnights were spent in Tallinn (down from 47% in 2019).
- **Hiiumaa was the only county where overnights increased slightly (+4% or by 1,655 overnights).**
- Tallinn experienced the biggest decline in absolute figures (-63% or by 2 million overnights).
- In general, the results were better in those counties which used to be less dependent on foreign tourism.
- However, the regional spread of **foreign** overnights changed only marginally – i.e. their overnights decreased significantly in almost all the regions. In 2020, 63% of foreign overnights were spent in **Tallinn** (64% in 2019). **Pärnu** accounted for 13% of foreign overnights (12% in 2019). The share of **Tartu** and **Saaremaa county** remained the same as in 2019 – 6% and 3% of foreign overnights, respectively.
- In 2020, 17% of **domestic** overnights were spent in Pärnu county, 14% in Tallinn and 11% in Ida-Viru county. In 2020, the share of Tallinn decreased slightly (from 17% in 2019) and the share of Pärnu county increased slightly (from 15% in 2019).
- In 2020, domestic overnights increased in **Pärnu, Lääne, Hiiumaa and Jõgeva counties.**
- The biggest decrease in absolute figures occurred in **Tallinn**: -27% or by 123,000 overnights.



# change in (foreign + domestic) overnights by county, 2020/2019 (%)

Overnights in Estonia decreased by 47%.  
Hiiumaa was the only county where overnights increased slightly (+4% or by 1,655 overnights).  
Tallinn experienced the biggest decline (-63% or by 2 million overnights).

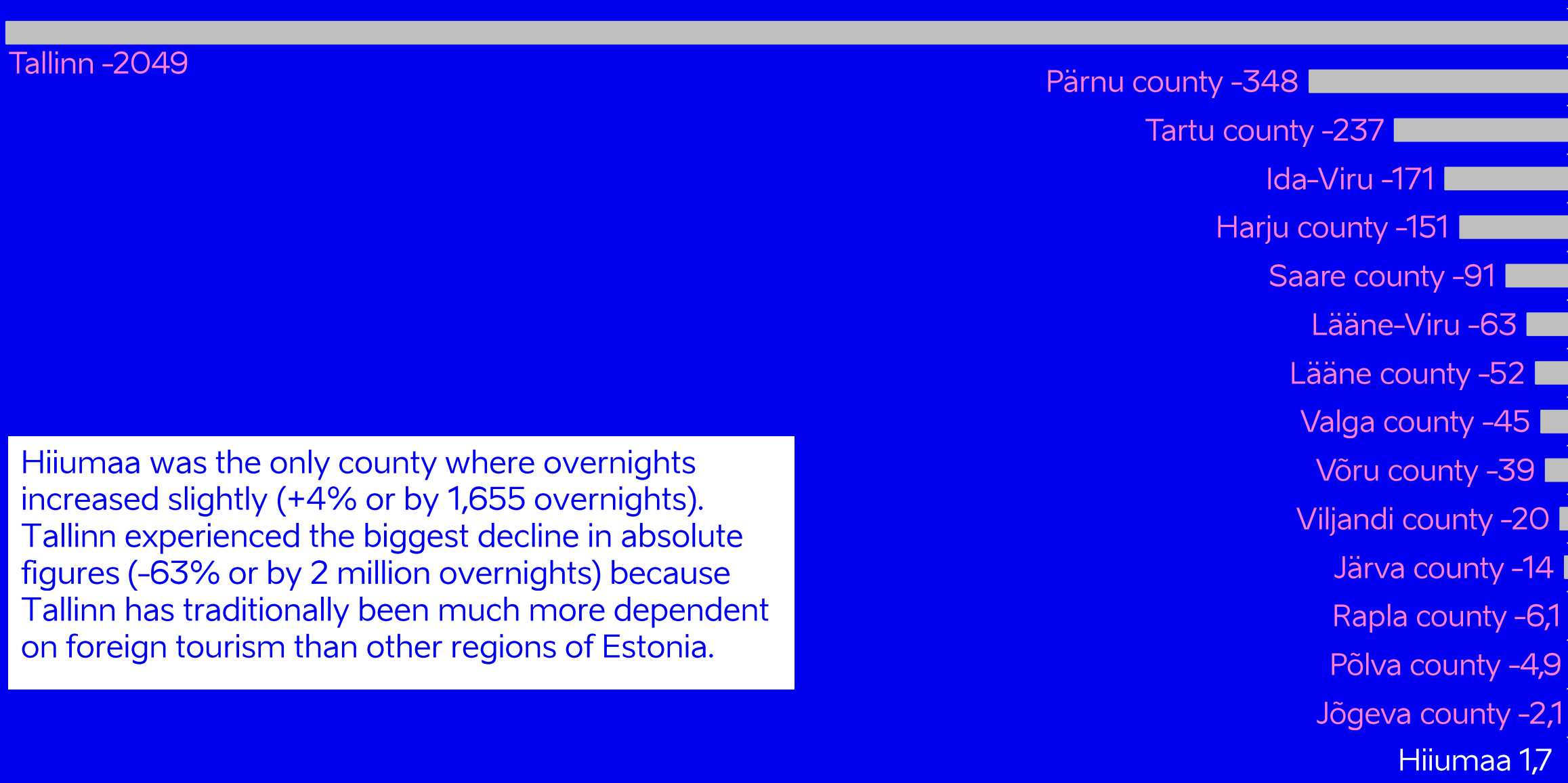


Change in (foreign + domestic) overnights:

- over -60%
- 36...-50%
- 20...-35%
- 5...-15%
- 0...+5%

Source: Statistics Estonia

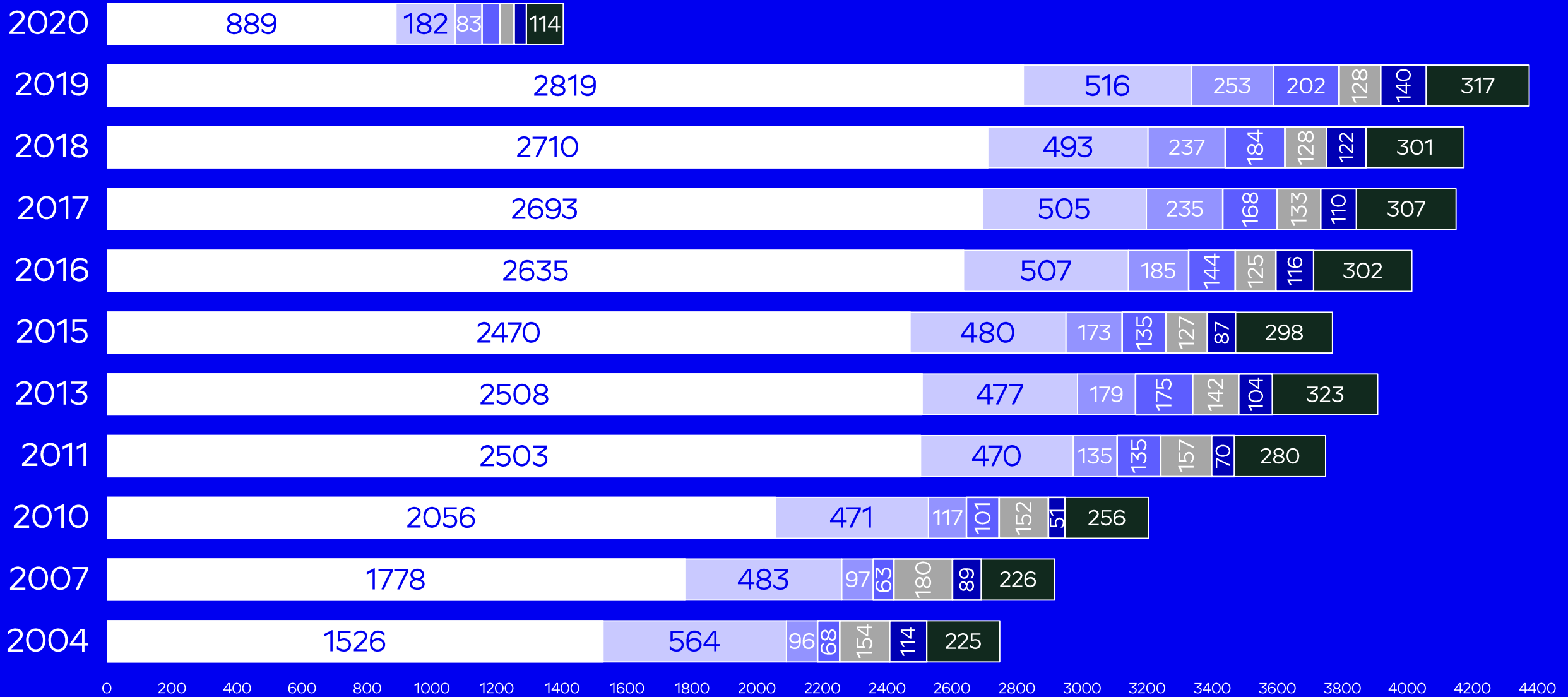
# change in all overnights by county, 2020/2019 (thous.)



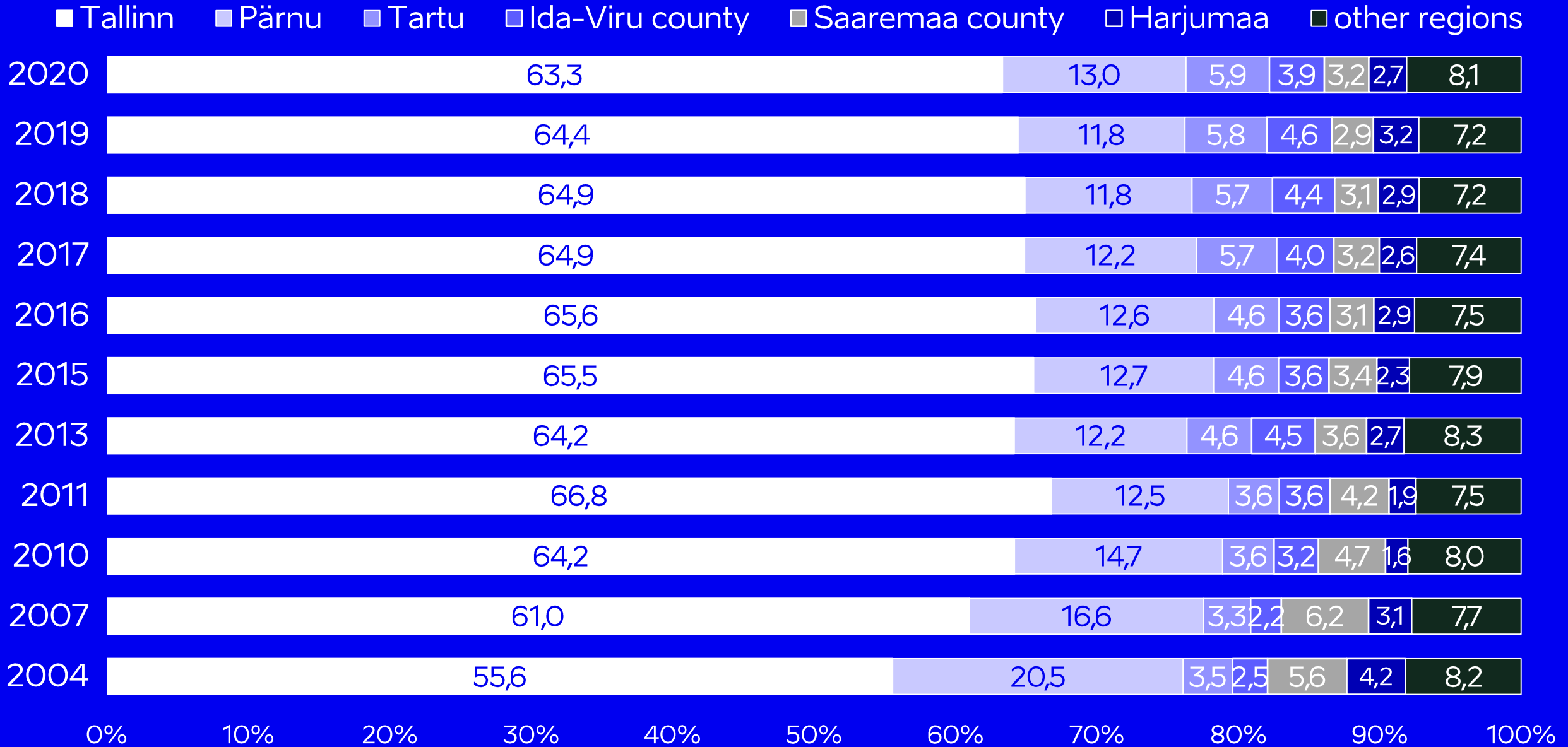
Hiiumaa was the only county where overnights increased slightly (+4% or by 1,655 overnights). Tallinn experienced the biggest decline in absolute figures (-63% or by 2 million overnights) because Tallinn has traditionally been much more dependent on foreign tourism than other regions of Estonia.

# foreign overnights in Estonia by region (thousands)

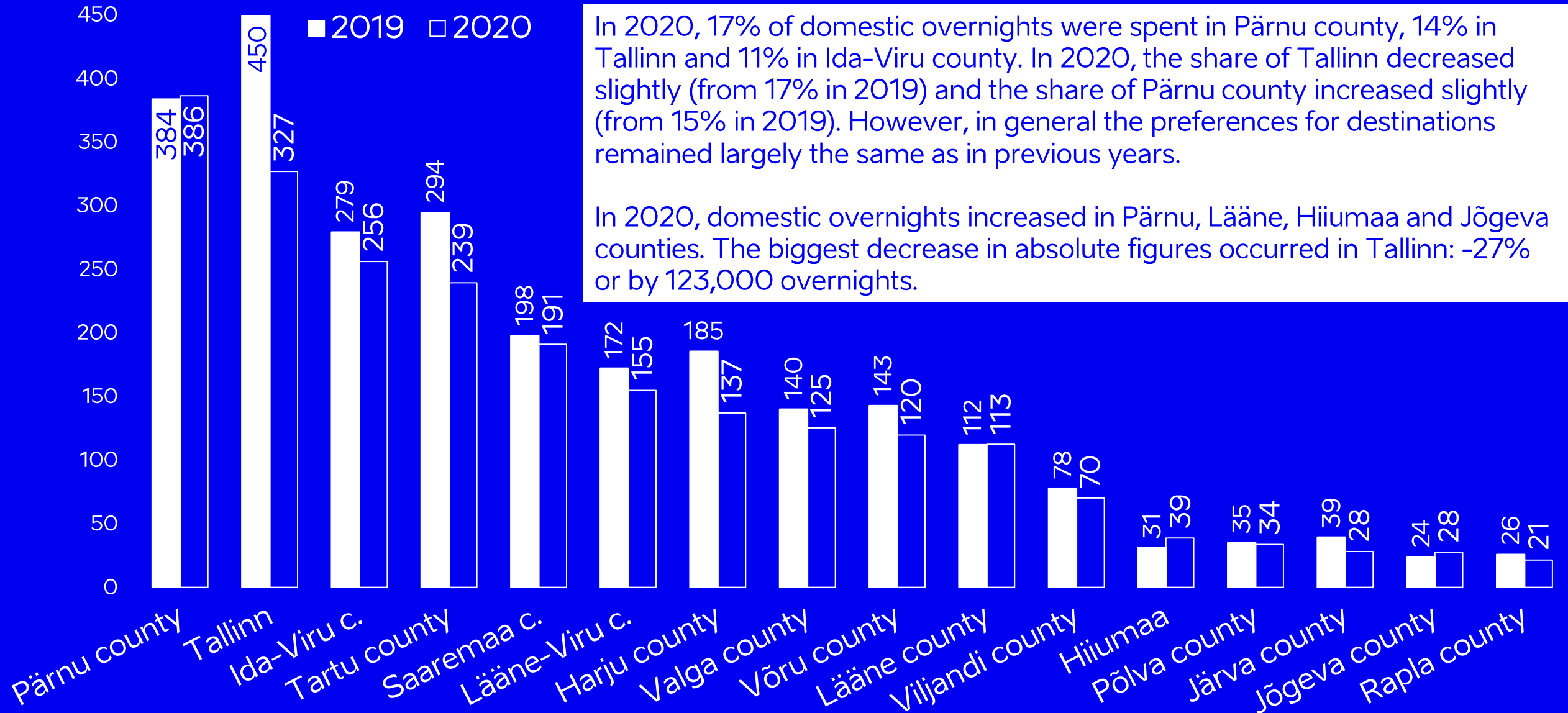
■ Tallinn 
 ■ Pärnu 
 ■ Tartu 
 ■ Ida-Viru county 
 ■ Saaremaa county 
 ■ Harjumaa 
 ■ other regions



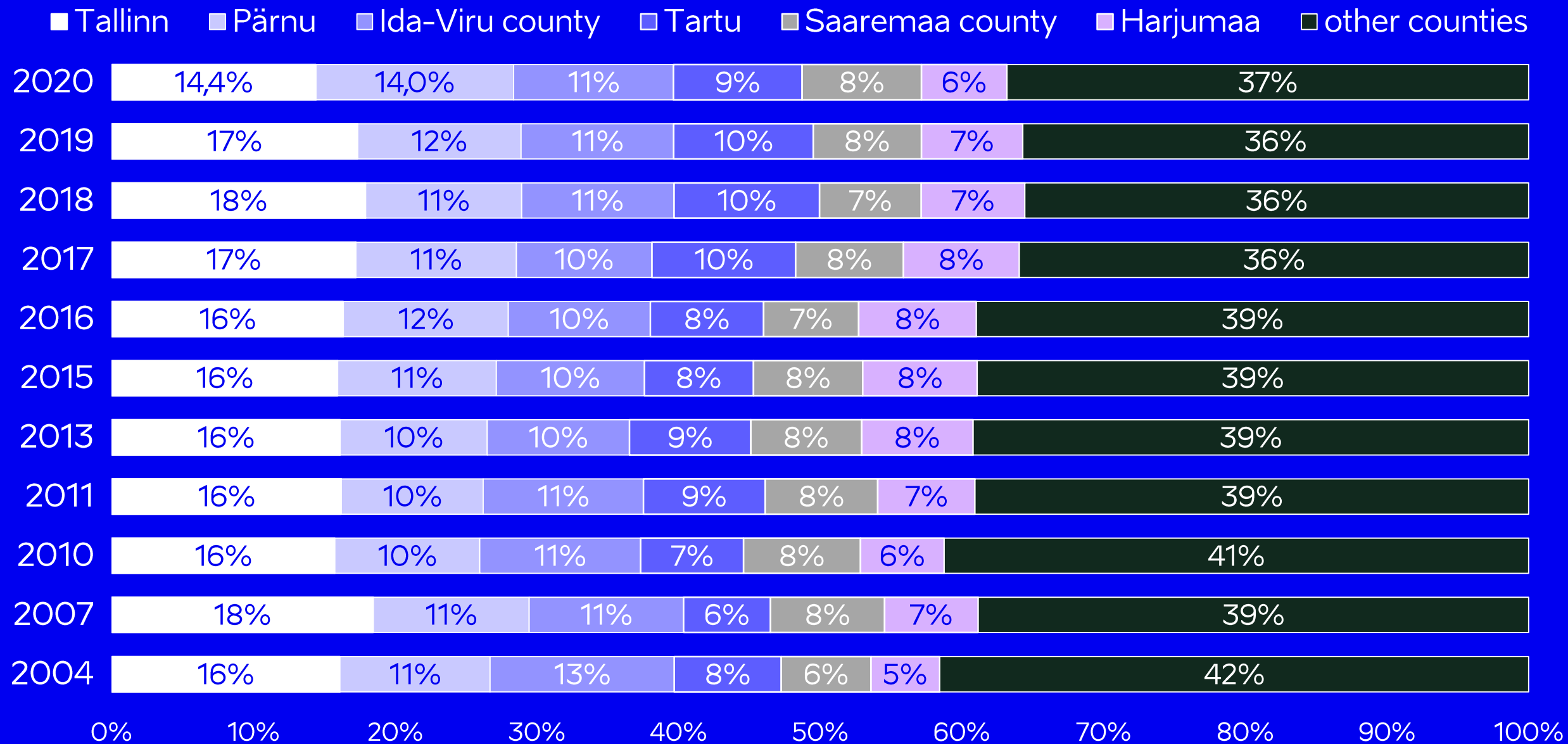
# foreign overnights in Estonia by region (%)



# domestic overnights in Estonia by county, 2019-2020 (thous.)

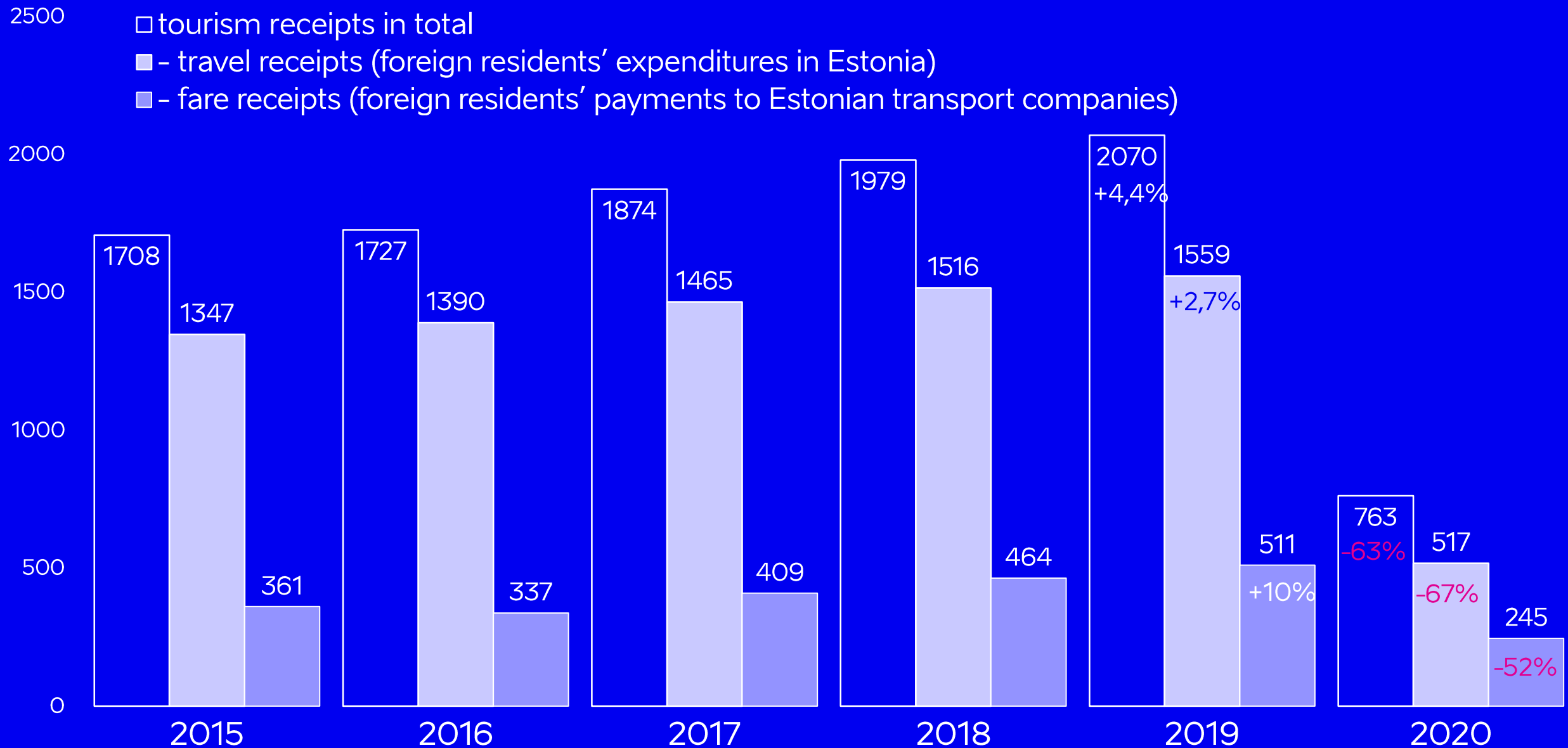


# domestic overnights in Estonia by region (%)



Source: Statistics Estonia

# tourism receipts 2015–2020 (mln euros)



Source: Bank of Estonia. The % shows y-o-y change.



# tourism receipts as a share of exports, 2019–2020

