

TOURISM IN ESTONIA IN 2016



- In 2016, 3.32 million foreign and domestic tourists stayed overnight in the accommodation establishments of Estonia (212,771 or 7% more than in 2015). The number of foreign tourists amounted to 2.06 million (6.6% up on 2015) and the number of domestic tourists to 1.27 million (7.2% more than in 2015).
- The number of nights spent by foreign and domestic tourists in the accommodation establishments amounted to 6.23 million (7.7% more than in 2015). Foreign tourists spent 4.01 million overnights (6.5% more than in 2015) and domestic tourists spent 2.21 million nights (+10%).
- Overnights by domestic tourists reached a new record for the 4th consecutive year.
- Foreign overnights showed a decline in 2015, mostly due to the substantial decrease in tourism from Russia. However, in 2016 the trend reversed with most of the bigger inbound markets showing growth. **Thus, the number of foreign tourists and overnights reached a new record in 2016.**
- **The number of foreign overnights mainly increased due to the strong increase in holiday trips.** Of the 4.01 million foreign overnights, 2.73 million were spent by holiday tourists (increase by 9.4% or by 234,824 overnights compared to 2015). Foreign overnights on business trips amounted to 843,800 (compared to 2015, their number increased by 31,420 or by 3.9%). Foreign overnights on other trips amounted to 440,563 (compared to 2015, their number decreased by 21,870 or by 4.7%). Nights spent on holiday trips accounted for 68%, business trips 21% and other trips 11% of foreign overnights.
- **The number of domestic overnights increased thanks to the increase in all types of trips, although in absolute figures, overnights on holiday trips showed the biggest increase.** Of the 2.21 million domestic overnights, 1.17 million were spent by holiday tourists (increase by 11% or by 119,875 overnights compared to 2015). Domestic overnights on holiday trips reached a new record for the fifth consecutive year. Domestic overnights on business trips amounted to 601,177 (compared to 2015, their number increased by 62,261 or by 12%). Domestic overnights on other trips amounted to 442,634 (compared to 2015, their number increased by 19,748 or by 5%). Nights spent on holiday trips accounted for 53%, business trips 27% and other trips 20% of domestic overnights.
- Of all nights spent in the accommodation establishments, domestic overnights accounted for 35.5%, Finnish overnights 28.4%, and Russian overnights 6.6%. German and Latvian overnights accounted for 4.3% and 3.5%, respectively. The share of domestic overnights increased slightly for the 5th consecutive year, as domestic tourism has increased slightly faster than inbound tourism.

MAIN FOREIGN SOURCE MARKETS

- Of the bigger inbound markets, the overnights of Finnish, German and Latvian tourists reached a new record in 2016. Of the somewhat smaller markets, also the overnights of Lithuanian, French, Dutch, Japanese and Chinese tourists reached a new record.
- In absolute figures, Finnish overnights showed the biggest increase among the foreign markets. Also German, Latvian, Lithuanian and Russian overnights contributed to the strong growth in foreign overnights.

FINLAND

- After a small (-1%) decline in 2015, tourism from Estonia's biggest inbound market **Finland** increased by 5% in 2016. Such a growth from a mature market can be considered an excellent result. The number of Finnish tourists staying in the accommodation establishments amounted to 951,025, their overnights reached 1.77 million. Estonia continues to be the most popular destination for the Finns. According to the population survey commissioned by the Estonian Tourist Board in Nov.2016, the Finns increasingly value Estonia as a safe destination that offers good restaurants, appealing events and is attractive for families with children. The growth in overnights in 2016 also reflects the improved economic conditions and consumer confidence in Finland (compared to 2015).
- In absolute figures, growth in Tallinn had the largest positive contribution to the increase in Finnish overnights. Their overnights in Tallinn reached a new record, surpassing one million for the first time ever and exceeding the previous record (dating from 2014) by as much as 6.6%. In 2016, their overnights in Tallinn amounted to 1.05 million (7% or 67,859 nights more than in 2015). The number of Finnish

overnights in their second most popular destination Pärnu reached 377,835 (5% or 18,855 nights more than in 2015).

RUSSIA

- Tourism from **Russia**, Estonia's second largest inbound market, started to increase slowly, mainly during the last 4 months of 2016. 200,972 Russian tourists spent 413,292 nights in the accommodation establishments in 2016. The number of Russian tourists increased by 8% and their overnights by 5% (compared to 2015). This can be considered a good result, taking into account that in most European countries Russian overnights still continued to decrease in 2016. In Latvia, their overnights also increased by 5% and in Lithuania by 1% whereas in the other Central and Eastern European countries and in the Nordic countries they continued to decrease. This suggests that, as far as the demand for short holidays is concerned, the nearby destinations that were cheaper to access were to some extent better positioned for the recovery.
- Compared to the record level achieved in 2013, their overnights in Estonia were still 39% down due to the substantial decline experienced in 2014 and 2015.
- In absolute figures, their overnights in Tallinn showed the biggest increase (in comparison with other destinations in Estonia). Russian overnights in Tallinn amounted to 241,614, increasing by 8% or by 17,031 nights. Russian overnights in their second most popular destination Ida-Viru County (North-East Estonia) also showed a healthy increase, reaching 84,046 (10% or 7,491 nights more than in 2015). It is worth noting that during the past few years when Russian outbound tourism has decreased, the accommodation establishments in North-East Estonia have managed to attract shorter-staying clientele. Thus, in 2016 the number of Russian overnights in North-East Estonia was 23% down on the record level achieved in 2013 but the number of Russian tourists was only 4% smaller than in 2013 (reflecting the shorter length of stay). In Tallinn, however, both the number of Russian tourists and their overnights were about 40% down on the record level achieved in 2013.

LATVIA

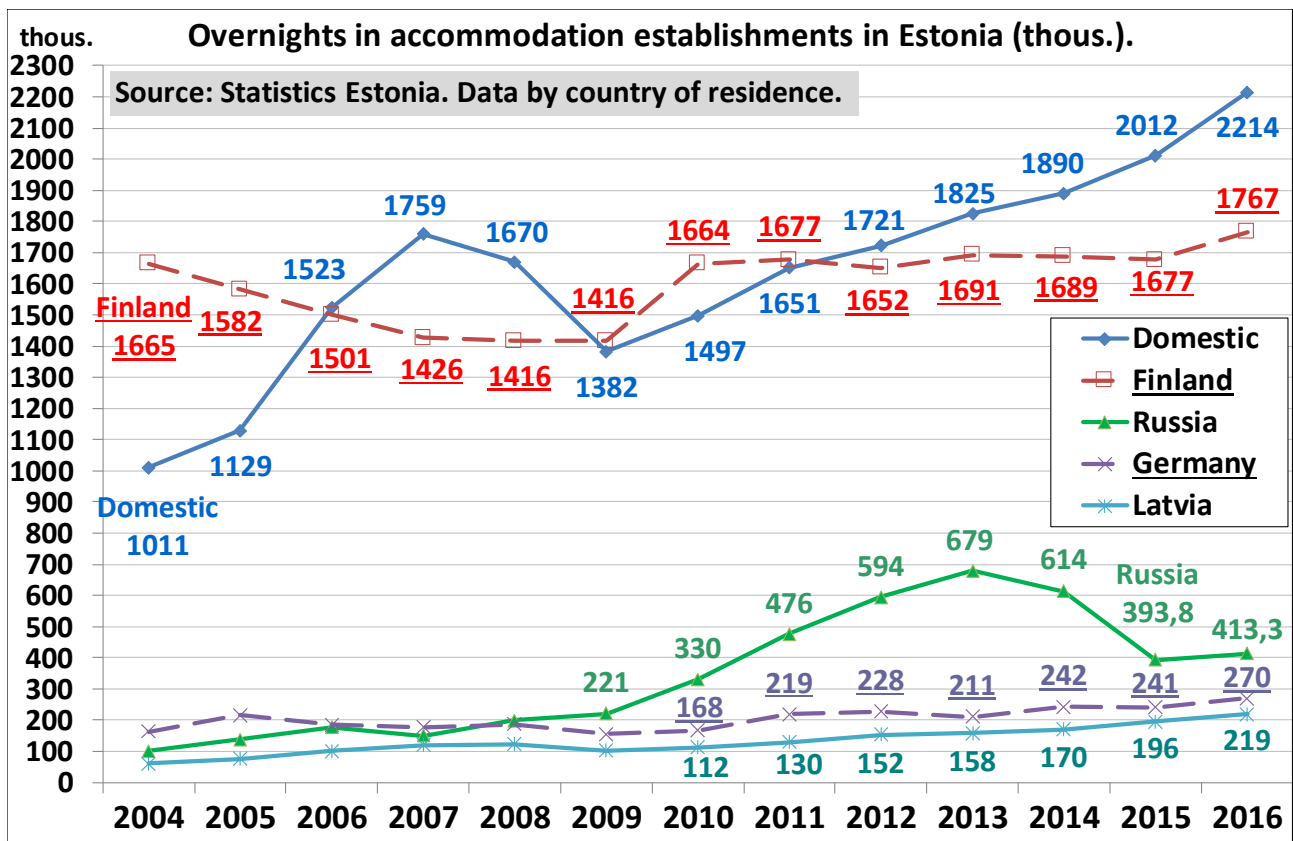
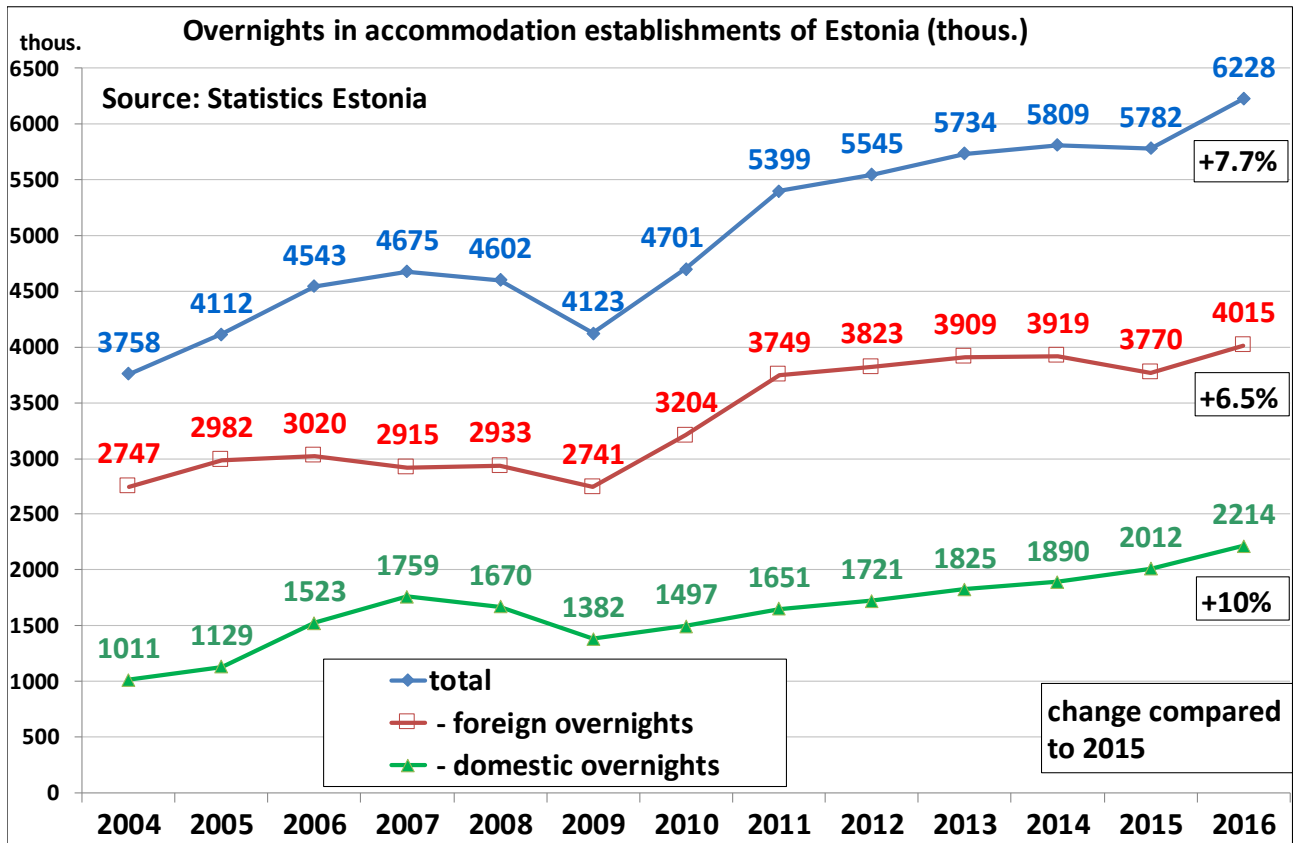
- **Latvian** overnights increased for the 7th consecutive year and reached a new record for the 6th consecutive year – partly thanks to new attractions and events. The number of Latvian tourists staying in accommodation establishments amounted to 142,043 (+11% compared to 2015), their overnights amounted to 218,764 (+12%).
- In absolute figures, their overnights in Pärnu showed the biggest increase: Latvian overnights in Pärnu amounted to 41,529, increasing by as much as 42% or by 12,197 nights. Latvian overnights in Tallinn amounted to 89,152, increasing by 7% or by 6,096 nights. Latvian overnights in Pärnu have increased for at least 12 years in a row (even during the economic crisis in 2008 and 2009). In the past 3 years, this growth has been especially remarkable (both in 2014 and 2016, their overnights increased by more than 40%, in 2015 – by 19%), reflecting the effective promotional activities of the spa hotels of Pärnu. It is also worth noting that in the past few years, the biggest growth in their overnights in Pärnu has occurred in the low season.

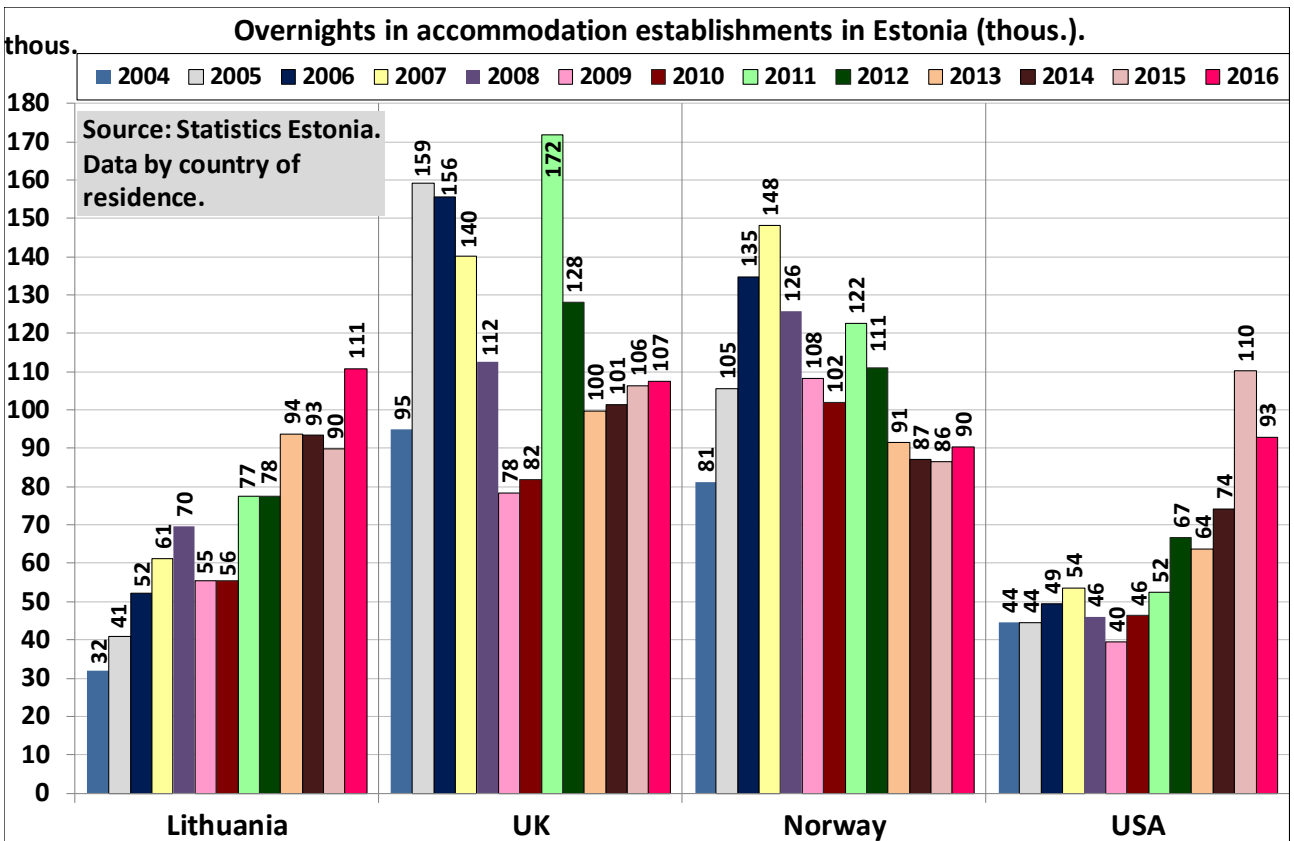
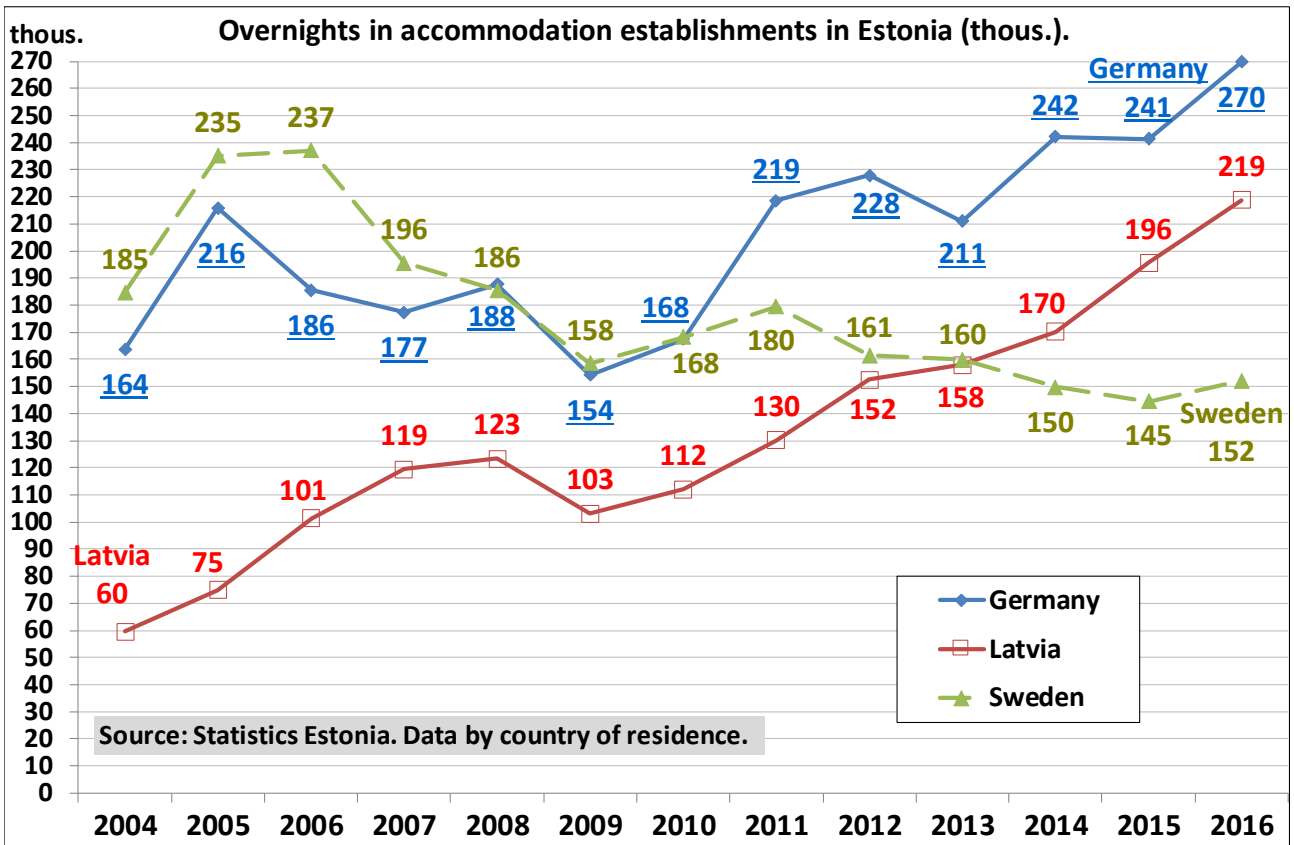
GERMANY

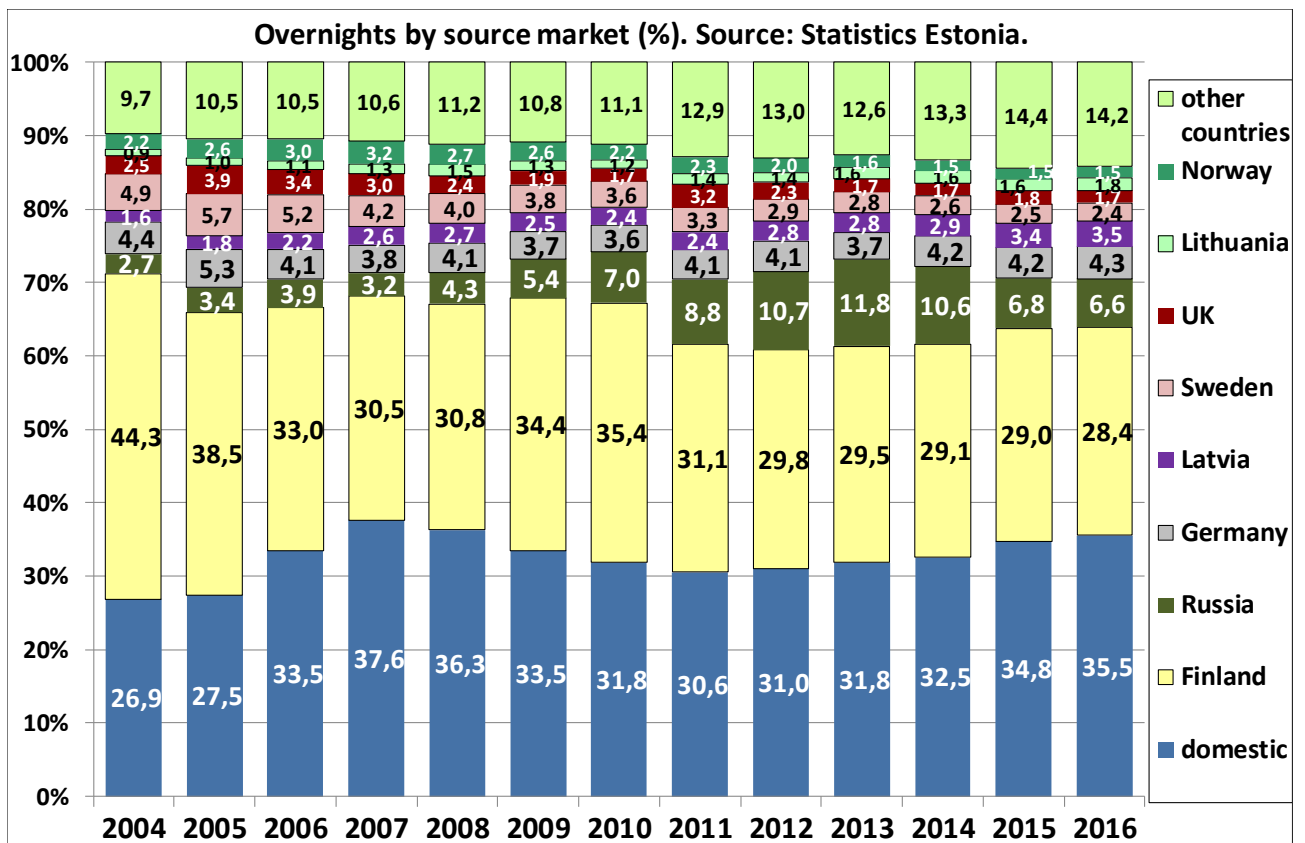
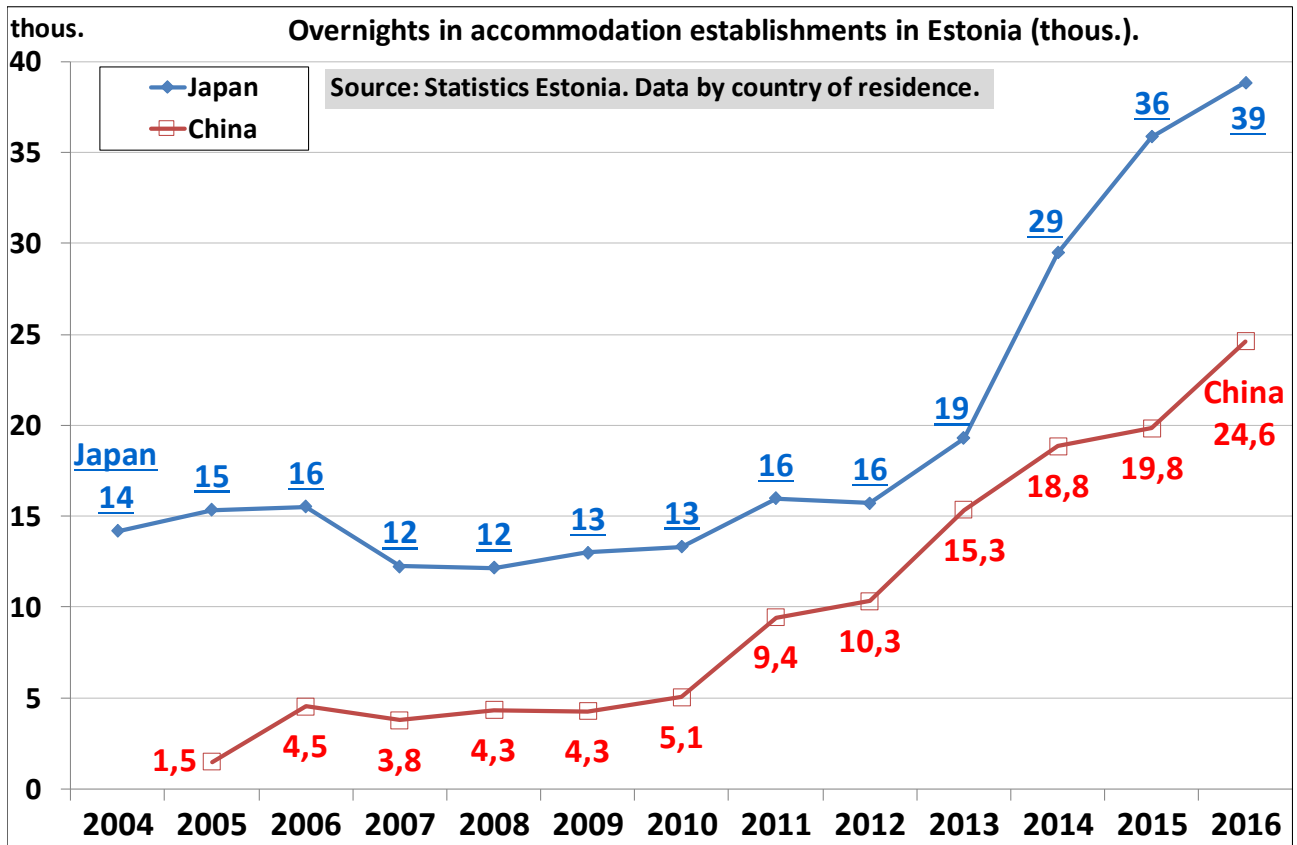
- In 2016 the number of **German** tourists in accommodation establishments amounted to 125,942 (8% more than in 2015) and their overnights to 269,673 (+12%). Both figures reached a new record. Their overnights increased in most of the destinations in Estonia, although in absolute figures, growth in Tallinn had the largest positive contribution to the increase in German overnights. The increase can partly be attributed to the increased number of flight connections with Germany.

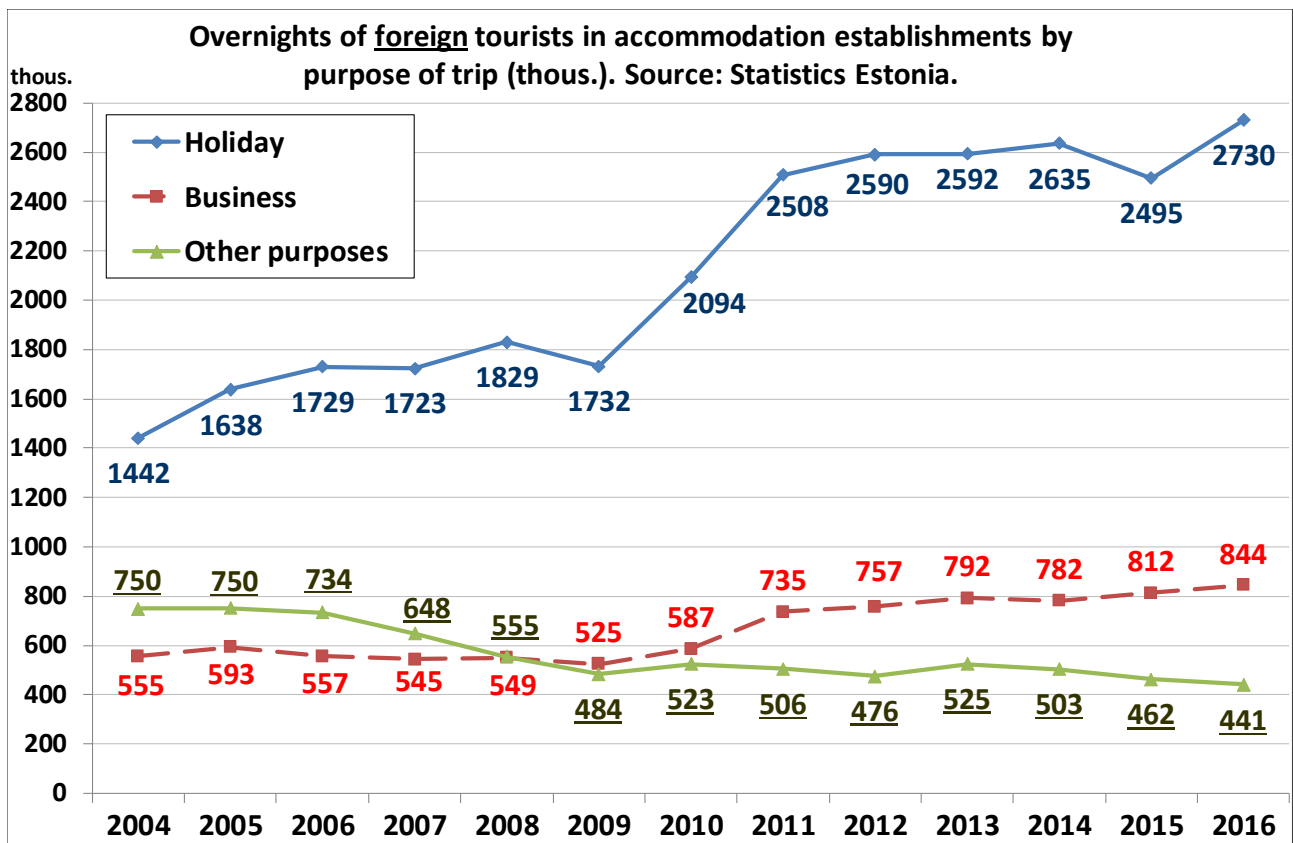
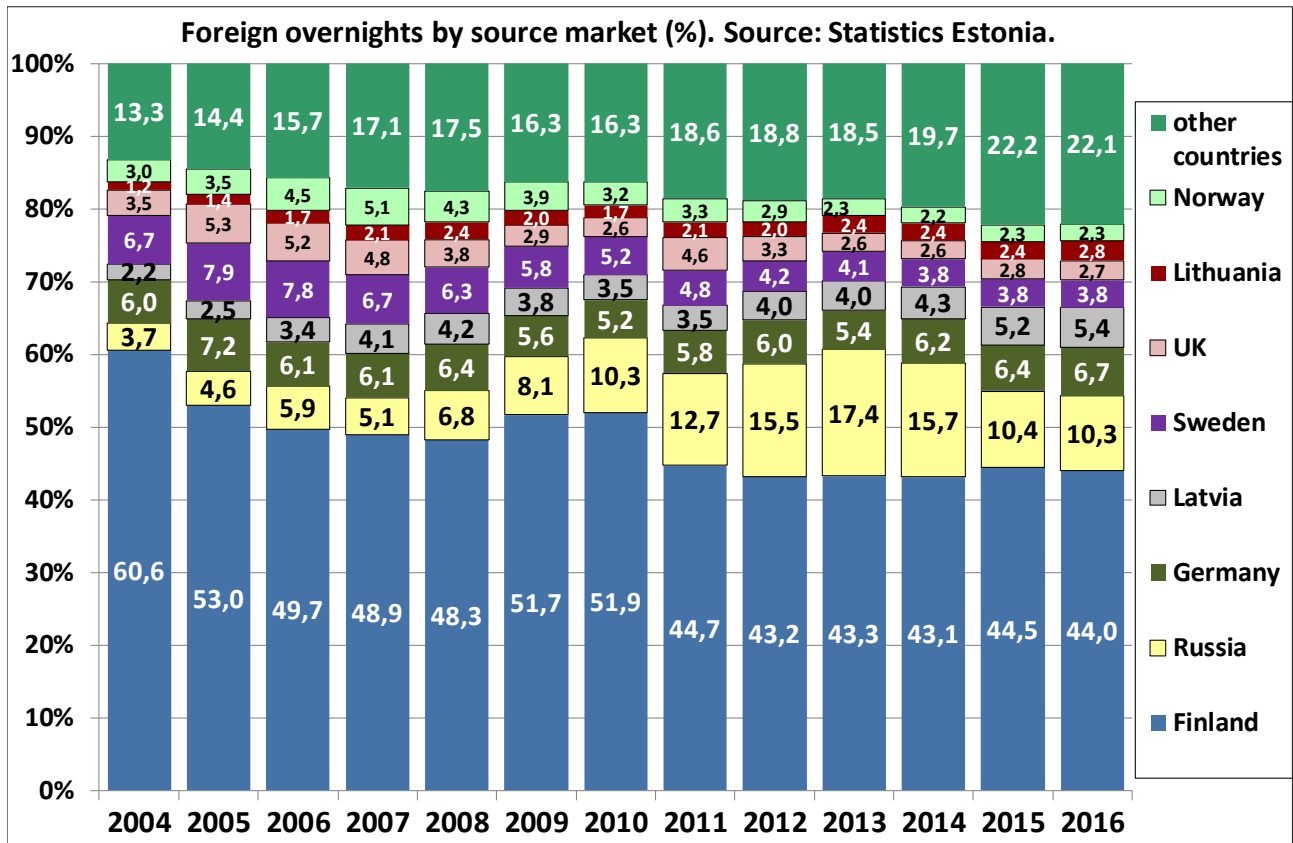
SWEDEN

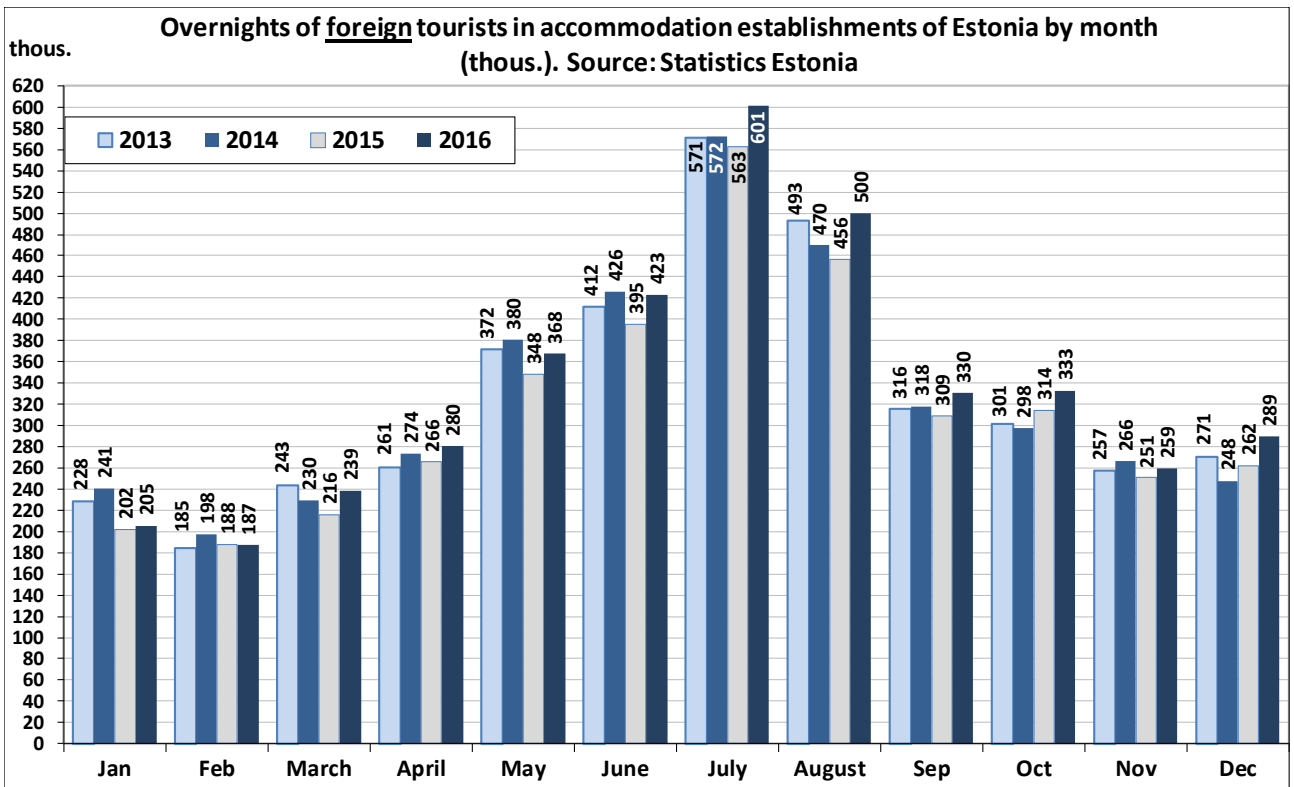
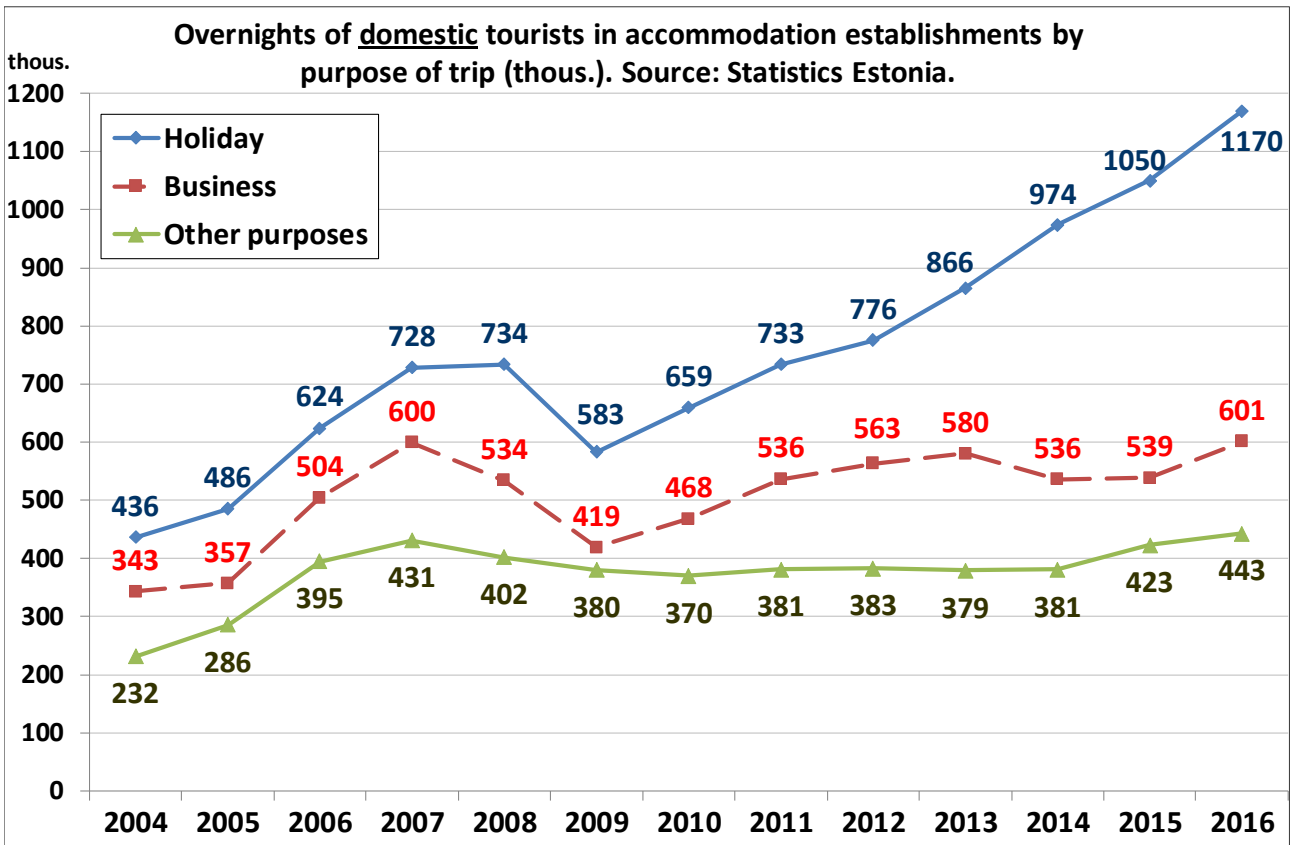
- Tourism from the 5th largest foreign market, Sweden, increased by 5% - after 4 consecutive years of decline. 74,415 Swedish tourists stayed in accommodation establishments in 2016, their overnights amounted to 152,080. In absolute figures, their overnights in Tallinn showed the biggest increase (in comparison with other destinations in Estonia). Their overnights in Tallinn amounted to 88,615, growing by 10% or by 7,726 nights. The increase can be attributed to the impactful Epic Estonia marketing campaign carried out by the Estonian Tourist Board and Tallink in 2015 and some events taking place in 2016.

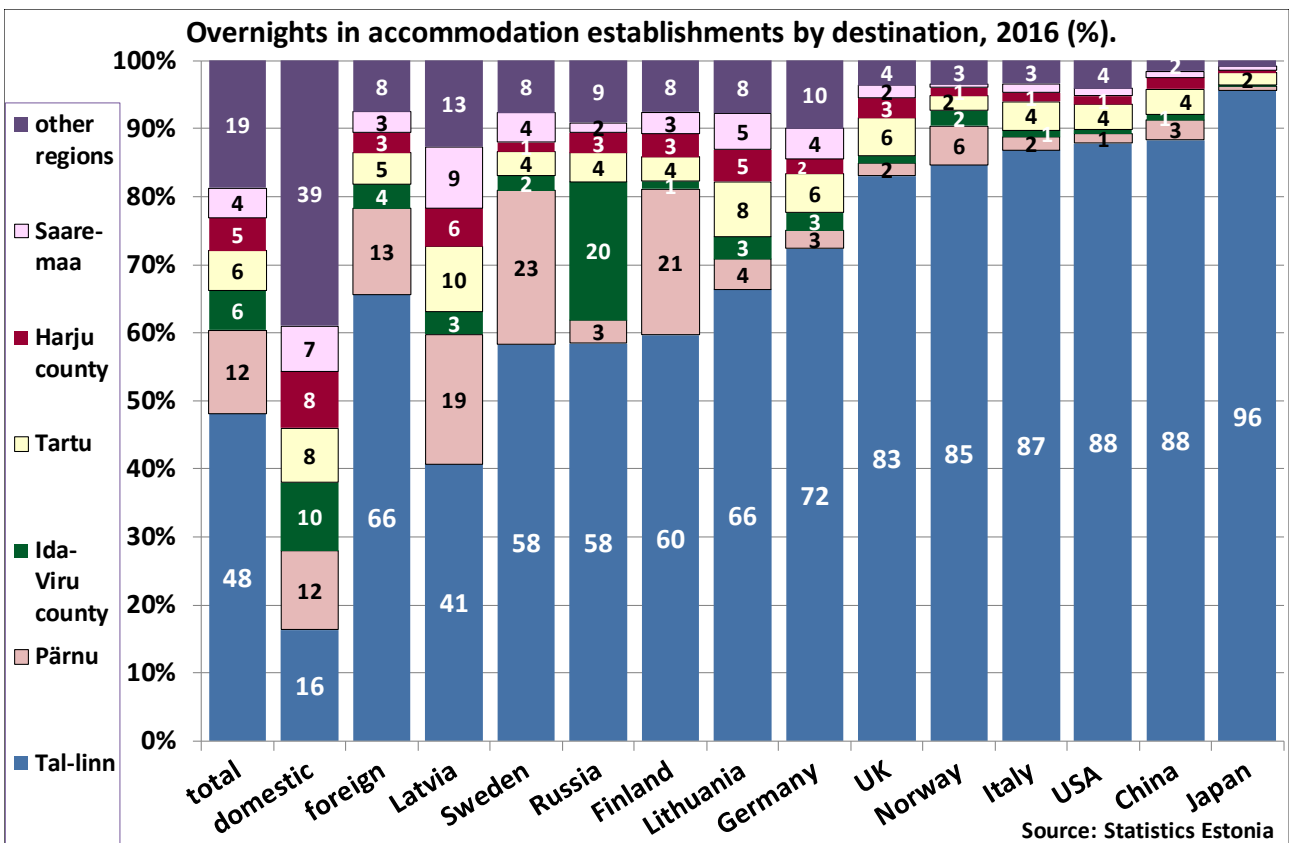
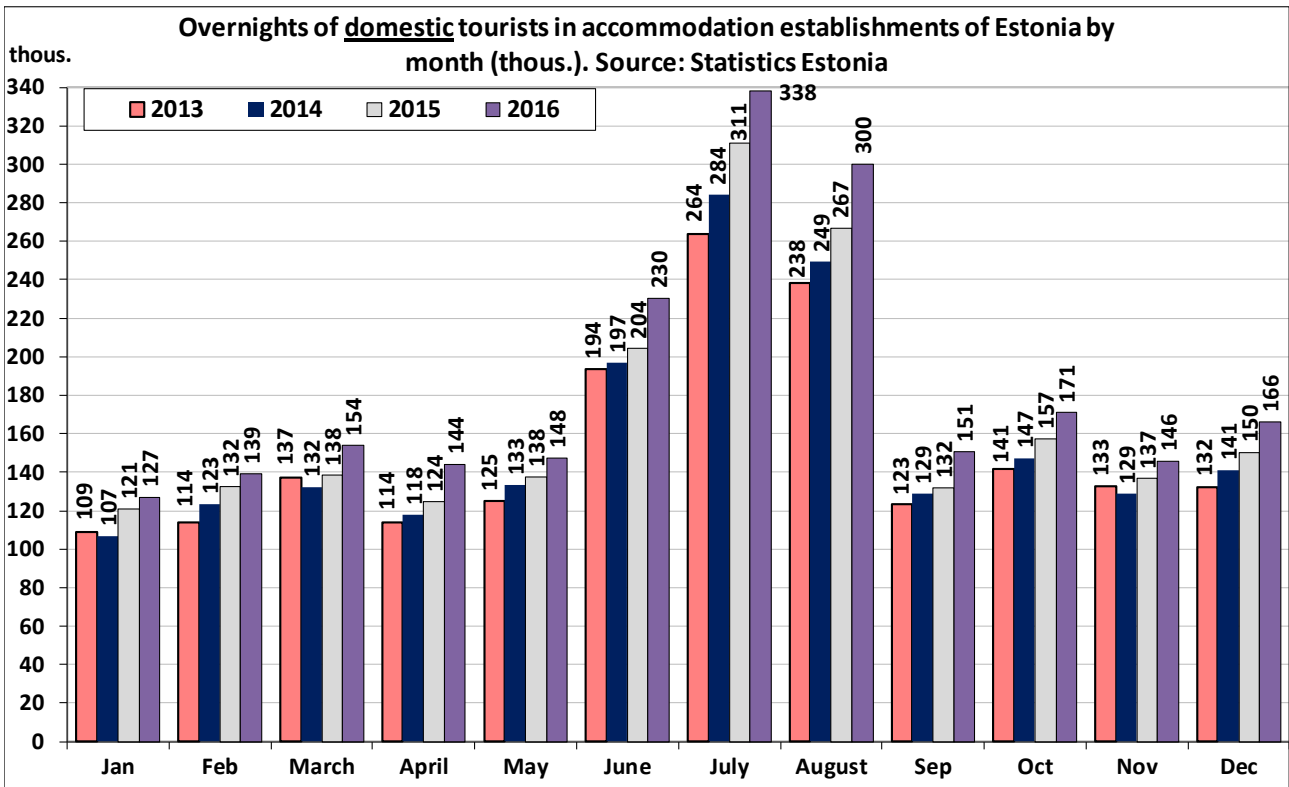












Arrivals and overnights in all accommodation establishments of Estonia by country of residence. Source: www.stat.ee.

	Arrivals in accommodation establishments					Year on year change				
	2012	2013	2014	2015	2016	2014/13	2015/14	2016/15	2015/14	2016/15
total	2 839 895	2 980 865	3 087 070	3 112 143	3 324 914	106 205	25 073	212 771	0,8%	6,8%
domestic	966 376	1 040 735	1 103 755	1 182 979	1 268 388	63 020	79 224	85 409	7,2%	7,2%
foreign	1 873 519	1 940 130	1 983 315	1 929 164	2 056 526	43 185	-54 151	127 362	-2,7%	6,6%
Finland	829 225	894 504	915 540	907 052	951 025	21 036	-8 488	43 973	-0,9%	5%
Russia	266 192	304 644	275 405	186 061	200 972	-29 239	-89 344	14 911	-32%	8%
Latvia	100 638	105 480	112 703	127 864	142 043	7 223	15 161	14 179	13%	11%
Germany	111 251	101 596	112 877	116 088	125 942	11 281	3 211	9 854	3%	8%
Sweden	78 412	74 313	71 963	71 087	74 415	-2 350	-876	3 328	-1%	5%
Lithuania	47 397	52 201	52 522	54 743	61 111	321	2 221	6 368	4%	12%
UK	54 305	43 109	46 189	48 061	48 733	3 080	1 872	672	4%	1%
USA	29 601	27 442	32 261	44 202	37 865	4 819	11 941	-6 337	37%	-14%
Norway	48 479	36 918	36 272	37 064	37 725	-646	792	661	2%	2%
Italy	30 574	26 506	26 968	29 521	33 508	462	2 553	3 987	9%	14%
Spain	25 003	22 926	25 929	27 665	32 194	3 003	1 736	4 529	7%	16%
France	24 089	22 780	24 058	24 718	28 605	1 278	660	3 887	3%	16%
Poland	25 513	26 001	25 652	22 728	27 237	-349	-2 924	4 509	-11%	20%
Japan	8 778	10 768	17 303	22 865	23 953	6 535	5 562	1 088	32%	5%
Holland	18 279	16 358	16 543	17 315	21 005	185	772	3 690	5%	21%
Denmark	14 091	11 900	11 729	14 202	15 236	-171	2 473	1 034	21%	7%
China	5 934	7 806	11 689	12 027	14 167	3 883	338	2 140	3%	18%
other	155 758	154 878	167 712	165 901	180 790	12 834	-1 811	14 889	-1%	9%

	Overnights in accommodation establishments					Year on year change				
	2012	2013	2014	2015	2016	2014/13	2015/14	2016/15	2015/14	2016/15
total	5 544 537	5 734 033	5 809 464	5 781 870	6 228 128	75 431	-27 594	446 258	-0,5%	7,7%
domestic	1 721 498	1 824 707	1 890 165	2 011 663	2 213 547	65 458	121 498	201 884	6,4%	10,0%
foreign	3 823 039	3 909 326	3 919 299	3 770 207	4 014 581	9 973	-149 092	244 374	-3,8%	6,5%
Finland	1 651 965	1 691 035	1 689 115	1 676 762	1 766 623	-1 920	-12 353	89 861	-0,7%	5%
Russia	593 783	679 343	613 868	393 805	413 292	-65 475	-220 063	19 487	-36%	5%
Germany	227 959	210 955	242 102	241 400	269 673	31 147	-702	28 273	-0,3%	12%
Latvia	152 491	158 031	170 279	195 649	218 764	12 248	25 370	23 115	15%	12%
Sweden	161 460	159 813	149 721	144 504	152 080	-10 092	-5 217	7 576	-3%	5%
Lithuania	77 585	93 784	93 359	89 860	110 728	-425	-3 499	20 868	-4%	23%
UK	127 969	99 742	101 394	106 364	107 480	1 652	4 970	1 116	5%	1%
USA	66 725	63 690	74 249	110 063	92 904	10 559	35 814	-17 159	48%	-16%
Norway	111 131	91 451	86 999	86 494	90 418	-4 452	-505	3 924	-0,6%	5%
Italy	70 070	62 700	63 563	68 745	76 073	863	5 182	7 328	8%	11%
Spain	53 144	54 633	60 417	79 919	74 019	5 784	19 502	-5 900	32%	-7%
France	54 790	52 368	53 531	54 744	60 225	1 163	1 213	5 481	2%	10%
Poland	50 351	60 788	54 292	45 743	58 159	-6 496	-8 549	12 416	-16%	27%
Holland	38 906	34 117	35 343	36 281	43 250	1 226	938	6 969	3%	19%
Japan	15 723	19 272	29 477	35 837	38 831	10 205	6 360	2 994	22%	8%
Denmark	27 887	24 174	24 646	27 588	29 309	472	2 942	1 721	12%	6%
China	10 337	15 339	18 842	19 817	24 609	3 503	975	4 792	5%	24%
other	330 763	338 091	358 102	356 632	388 144	20 011	-1 470	31 512	-0,4%	9%