

INBOUND TOURISM IN ESTONIA IN 2013

- **In 2013, 1.94 million foreign tourists stayed overnight in the accommodation establishments of Estonia. Compared with 2012, their number increased by 3.6% or by 66,611 in absolute numbers. The number of foreign overnights was 3.9 million (2.3% up on 2012).**
- **This means a new record level in inbound tourism for the 4th consecutive year.** It is worth noting that both in 2010 and 2011 inbound tourism in Estonia increased substantially (both in 2010 and 2011, foreign overnights increased by 17% compared with the previous year). Both in 2012 and 2013, foreign overnights increased by 2% compared with the previous year.
- In 2011, the driving force behind the substantial increase was the creation of new transport connections with many European target markets (especially low-cost flights). However, both in 2012 and 2013 the number of air connections was reduced again (compared with the previous year). In 2013, (holiday) tourism from the UK, Germany and the Netherlands was most severely influenced by this development. Thus, the growth in inbound tourism in 2013 was achieved thanks to an increase in tourism from nearby source markets (Finland, Russia, Latvia, Lithuania and also Poland). In addition, tourism from Asia showed a strong increase, with Chinese overnights increasing by 48% and Japanese overnights by 23%.
- The share of Finnish overnights among all foreign overnights remained on the same level as in 2012 – 43%. The share of Russian overnights continued to increase: in 2012, they accounted for 15.5% of all foreign overnights; in 2013, this figure increased to 17.4%. The share of German overnights decreased slightly (from 6% to 5.4%). The market share of Sweden and Latvia remained roughly on the 2012 level (both accounted for 4% of all foreign overnights).
- **The regional distribution of foreign overnights changed slightly: the share of Tallinn as a destination decreased slightly for the second consecutive year** (in 2011, Tallinn accounted for 67% of foreign overnights; in 2012 – 65% and in 2013 – 64%). This can be explained by the changes in source markets: the market share of nearby markets increased (tourists from these markets are more inclined to visit destinations outside Tallinn), whereas the share of several more distant Western and Southern European destinations decreased (they tend to prefer to stay in Tallinn). The share of Pärnu remained stable (12%), while the share of Tartu continued to increase (from 3.6% in 2011 to 4.6% in 2013) – thanks to the increase in Russian, Latvian and Finnish overnights there. The long-term growth trend in Ida-Viru County in North-East Estonia continued as well – especially thanks to the long-term increase from Russia but in 2013 also thanks to the growth from Finland.
- Of the 1.94 million foreign tourists staying overnight in the accommodation establishments, 1.4 million were holiday tourists. Their number increased by 2.1% compared with 2012 but as the **holiday trips** were shorter than a year ago, the number of foreign overnights on holiday trips increased by just 0.1% (remaining at 2.6 million). The number of foreign overnights on **business trips** was 792,297 (increase by 4.7%). Overnights on other trips amounted to 524,732 (increase by 10%).
- In 2013 the number of tourists from the largest source market, **Finland**, amounted to 894,504 (+8% compared with 2012) and their overnights to 1.69 million (+2.4%). Both figures reached a new record level. In absolute figures, their overnights increased most in Tallinn where both the number of Finnish tourists and overnights reached a new record. However, their length of stay in Tallinn decreased slightly (with the number of Finnish tourists in Tallinn increasing by 10% but their overnights by just 3%). This development is probably related to the changes in ADR (average daily rate) in Tallinn. Their average length of stay in Tallinn increased when ADR decreased in 2009 and 2010 but by now ADR has increased to the pre-crisis level, making people consider slightly shorter trips again. In addition to Tallinn, Finnish overnights showed a bigger increase in absolute figures also in Pärnu and Pärnu County, in Ida-Viru County and in Tartu. It is worth noting that in Tartu their overnights increased for the fourth consecutive year, reaching a new record. Also, their length of stay there has gradually increased over a longer period.
- As in several previous years, tourism from **Russia** continued to show an impressive increase. The general outbound travel trend in Russia continued to be very positive in 2013, with strong growth in Russian arrivals



and overnights reported for the majority of European destinations. However, at least in the Nordic-Baltic region, their growth was slower than in the past few years. The number of Russian tourists staying at accommodation establishments in Estonia – 304,644 – was 38,452 or 14% more than in 2012. The number of Russian overnights also increased by 14%, reaching 679,343. As in previous years, tourism from Russia continued to increase substantially in their most popular destination Tallinn (+13%) as well as in most other regions of Estonia. However, the share of Tallinn among the destinations in Estonia continued to decrease slightly (for example, in 2007 Tallinn accounted for 68% of Russian overnights in Estonia but in 2013 the respective figure was 61%). This reflects active promotion by various regions and entrepreneurs, in addition to the promotional activities on the national level.

- Tourism from **Germany** decreased in 2013, following three years of growth and a new all-time record achieved in 2012. In 2013 the number of German tourists at accommodation establishments amounted to 101,596 (9% less than in 2012) and their overnights to 210,955 (-7%). The decline can mainly be attributed to the decline in the number of flight connections with Germany (following an increase in flight connections in 2011 and in 2012). On the other hand, German overnights decreased in all the Baltic and Nordic countries as well (with the exception of Sweden where they showed a small increase).
- The number of **Latvian** tourists and their overnights reached a new record level for the third consecutive year, although in 2013 the growth was much more modest than in 2011 and 2012. The number of Latvian tourists amounted to 105,480 (5% more than in 2012) and their overnights to 158,031 (4% more than a year ago). In absolute figures, most of the growth occurred in Tartu and Tartu County, following a strong growth already in 2012. The long-term growth trend in Pärnu continued as well.
- In 2013 the number of **Swedish** tourists was 74,313 or 5% less than a year ago, however, the number of Swedish overnights decreased by just 1%, amounting to 159,813. In Tallinn both the number of Swedish tourists and their overnights decreased by 8%. However, in Pärnu – their second most popular destination in Estonia – their arrivals increased by 12% and their overnights by as much as 20%. The number of overnights in Pärnu increased thanks to the increase in the number of longer spa holidays: their average length of stay in Pärnu increased from 4.2 nights to 4.5 nights.

DOMESTIC TOURISM IN ESTONIA IN 2013

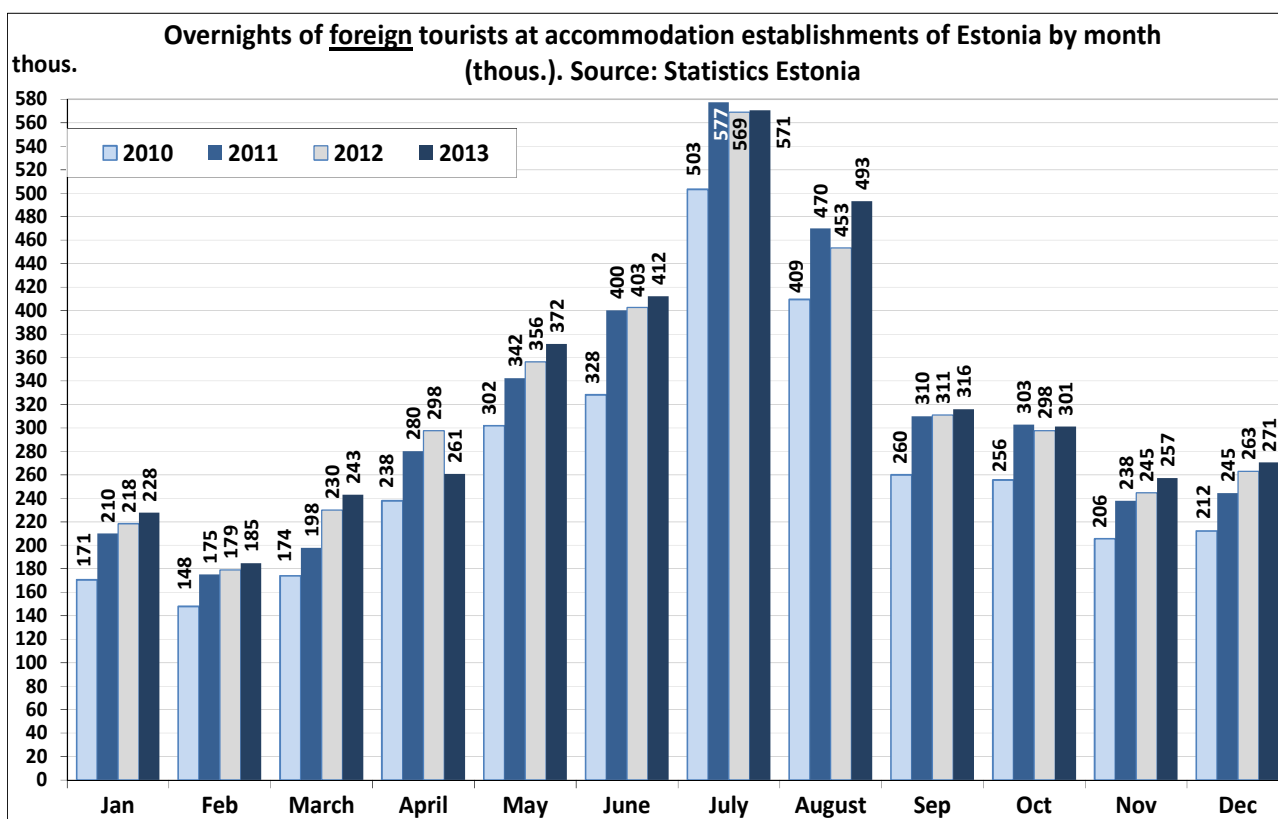
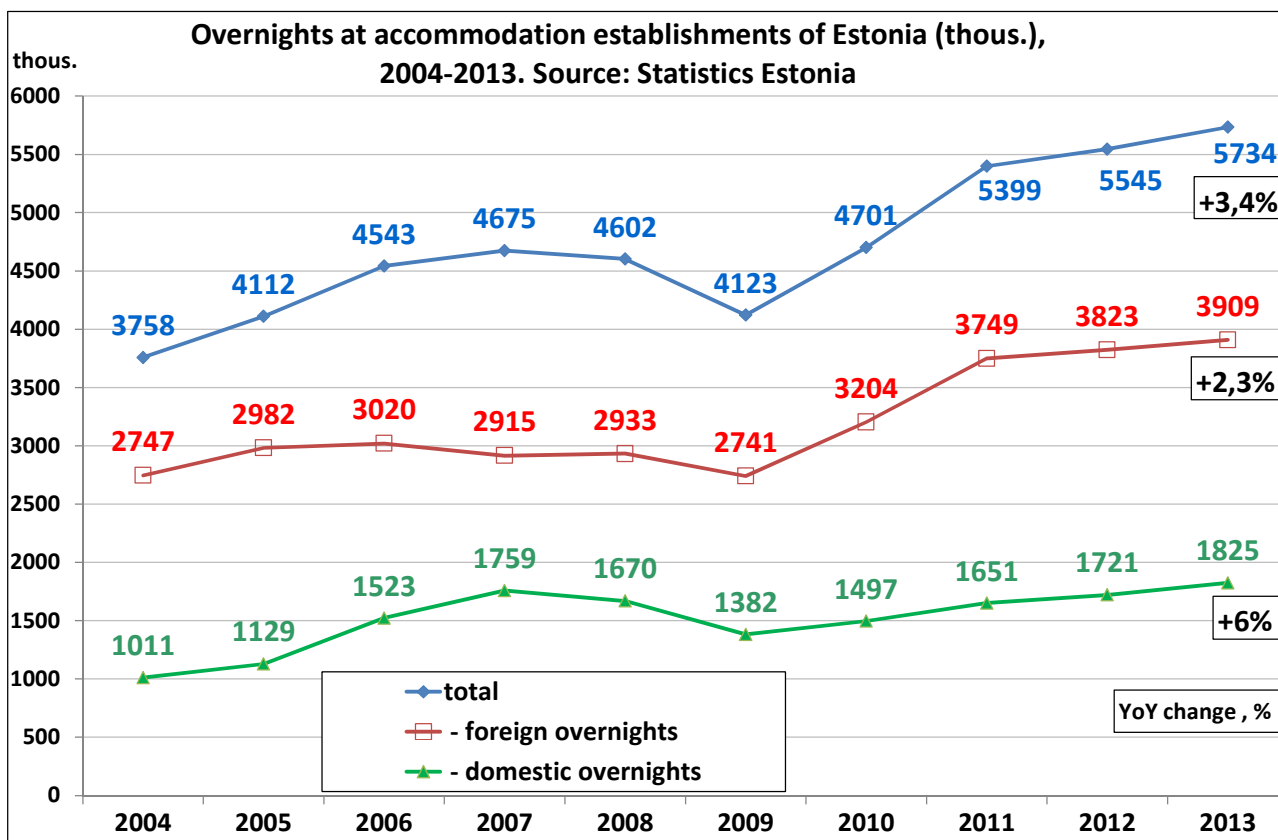
- **The number of domestic tourists and their overnights continued to grow, achieving a new record. In 2013, 1.04 million domestic tourists stayed overnight in the accommodation establishments of Estonia. Compared with 2012, their number increased by 8% or by 74,359 in absolute numbers. The number of domestic overnights was 1.82 million (6% up on 2012).** The number of domestic tourists exceeded the pre-crisis record level for the first time already in 2012 but the number of their overnights only in 2013.
- The number of domestic overnights increased mainly thanks to the increase in holiday travel. Domestic overnights on holiday trips amounted to 865,581, increasing by 12% or by 90,059 nights. Overnights of domestic tourists on business trips increased by 3% but their overnights on other trips decreased by 1%.

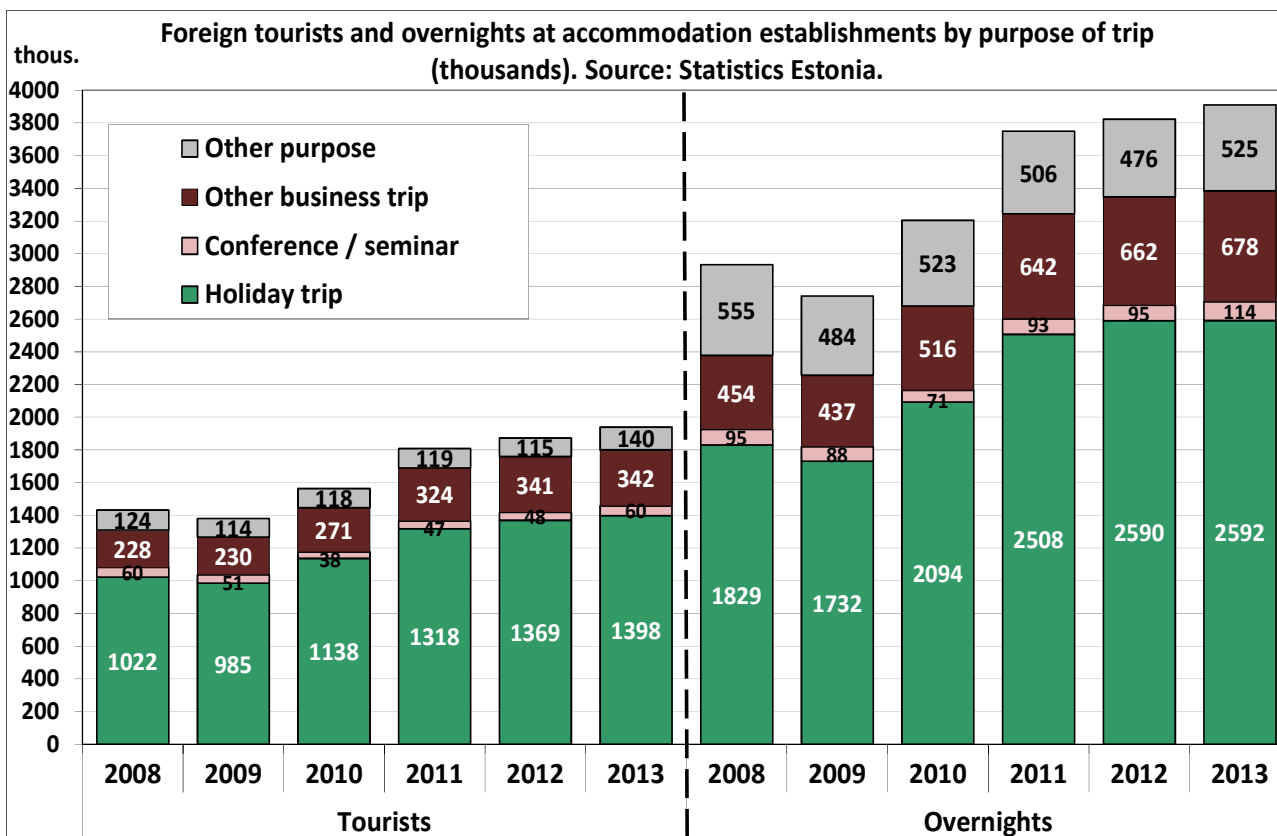
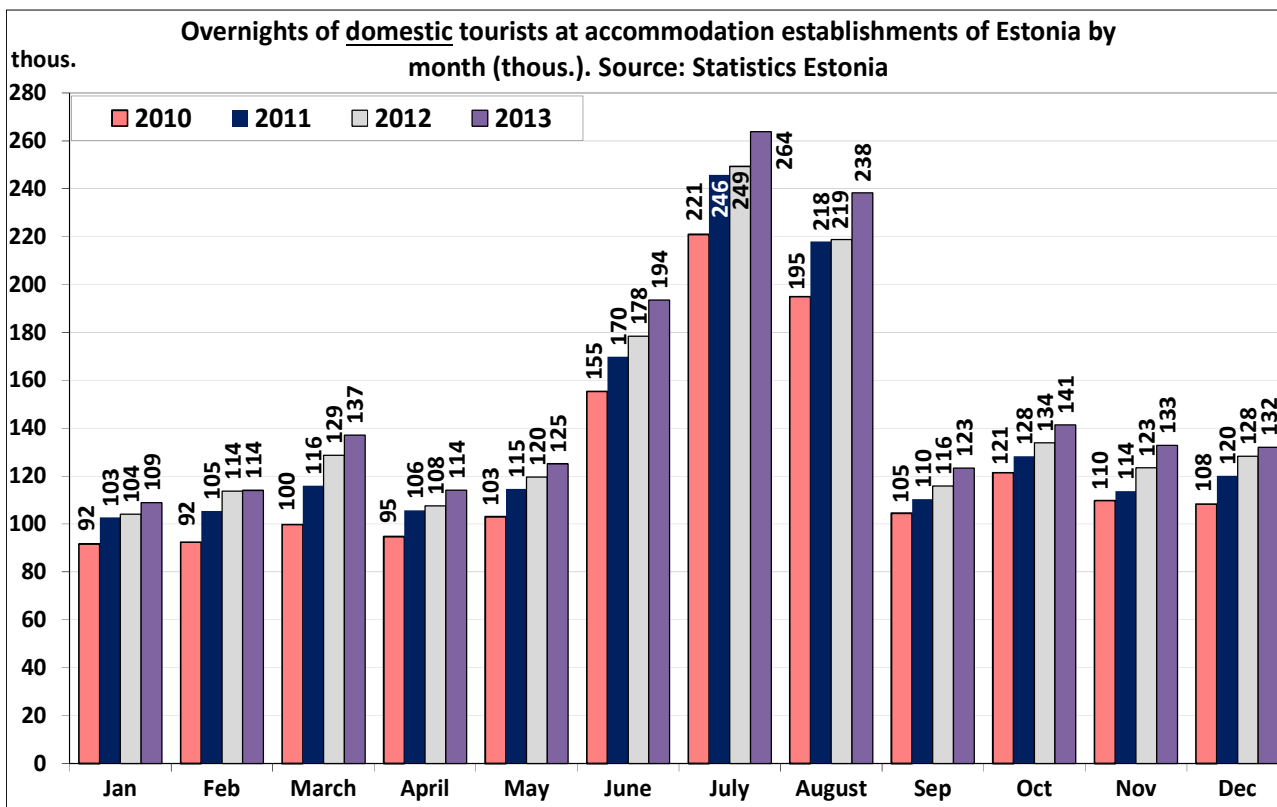
TOURISM RECEIPTS IN 2013

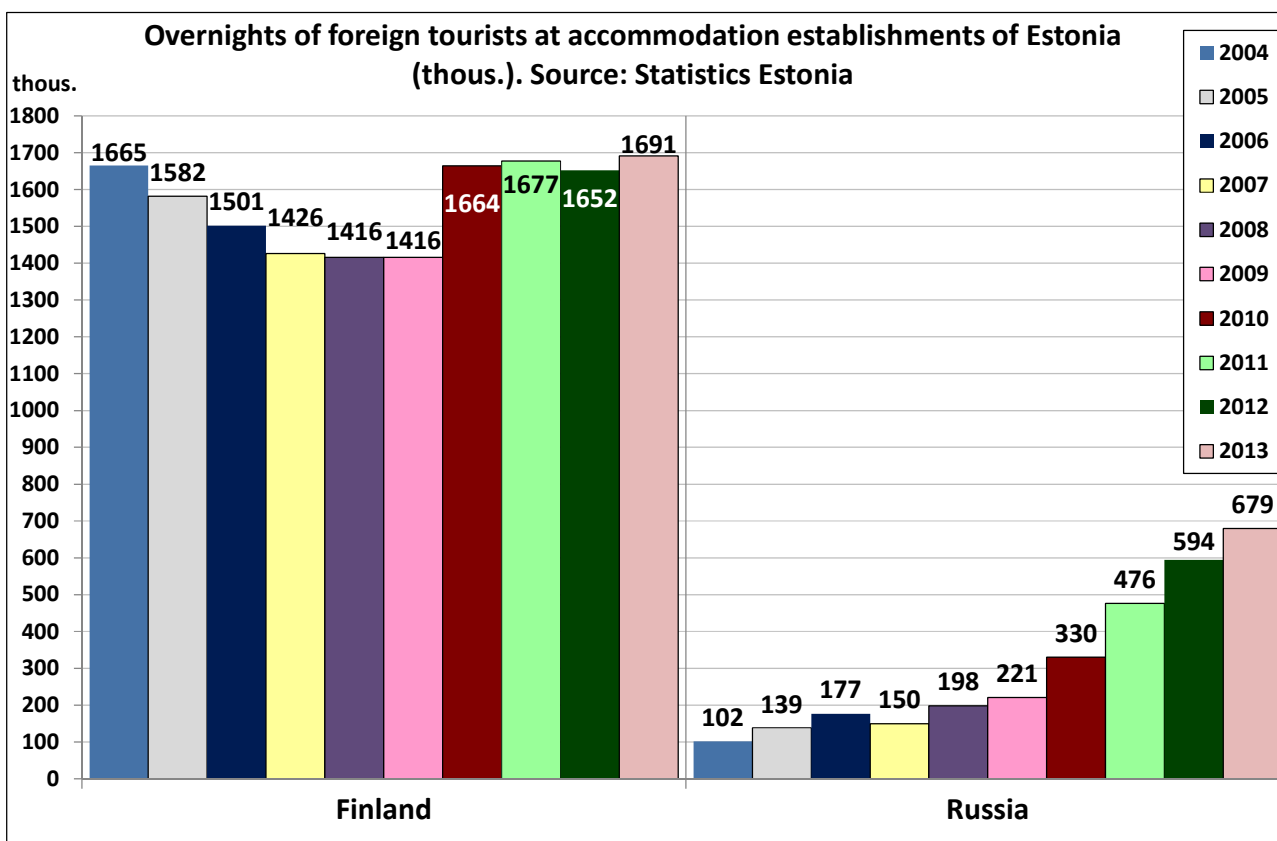
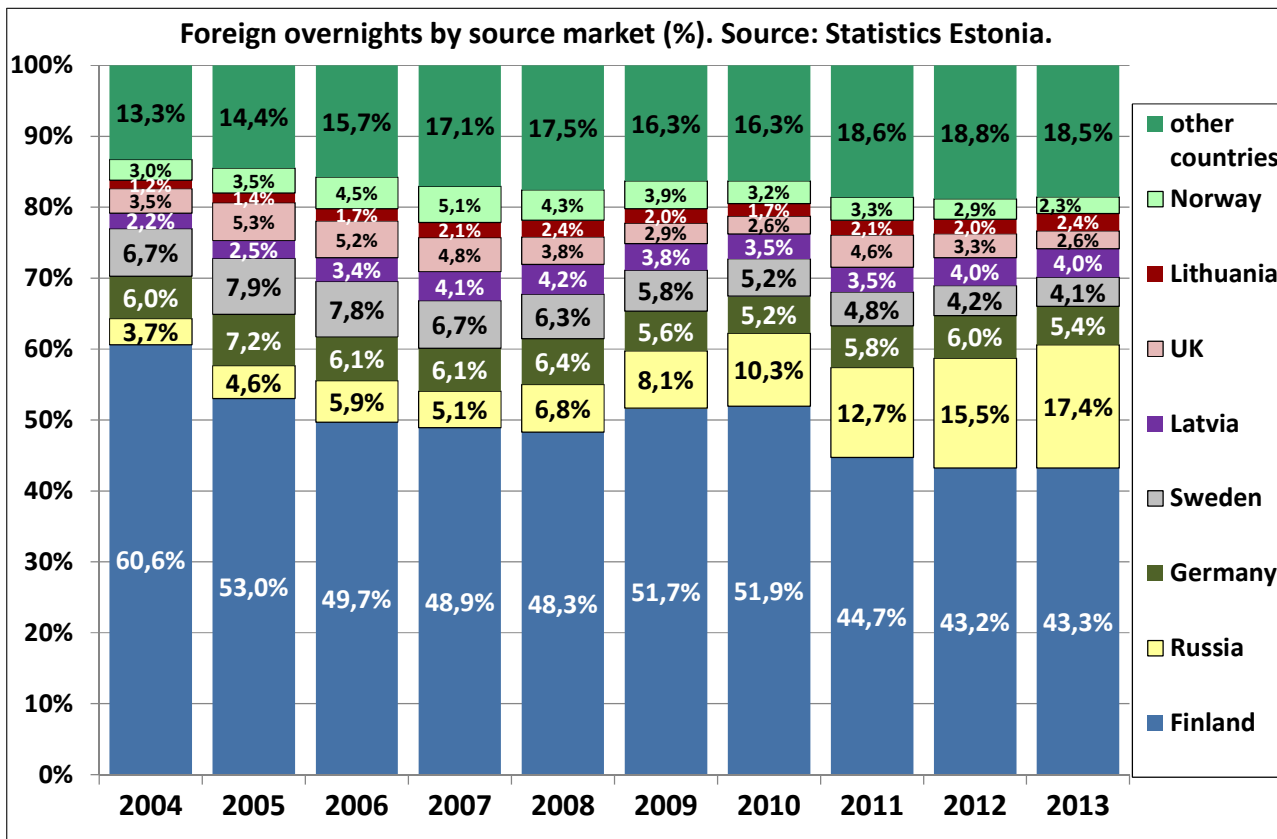
- According to the Bank of Estonia, **Estonia's tourism receipts reached a new record for the third consecutive year, amounting to EUR 1.35 billion in 2013.** This was 8.5% or EUR 105 million more than in 2012. Travel receipts (foreign visitors' expenditures in Estonia) amounted to EUR 1.05 billion (10% more than in 2012). Fare receipts (foreign visitors' payments to Estonian transport companies) amounted to EUR 297 mil. or 3.7% more than a year ago. The share of tourism receipts in Estonia's total exports of goods and services increased to 8% (in 2012, it was 7.4%).
- According to Statistics Estonia, the sales of accommodation services by all accommodation establishments amounted to EUR 187.4 million in 2013 (7.7% up on 2012). Thus, the sales of accommodation services increased more than the number of overnights (domestic and foreign overnights together increased by 3.4%).

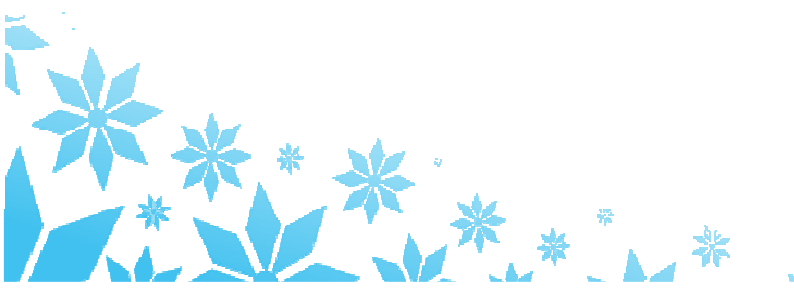
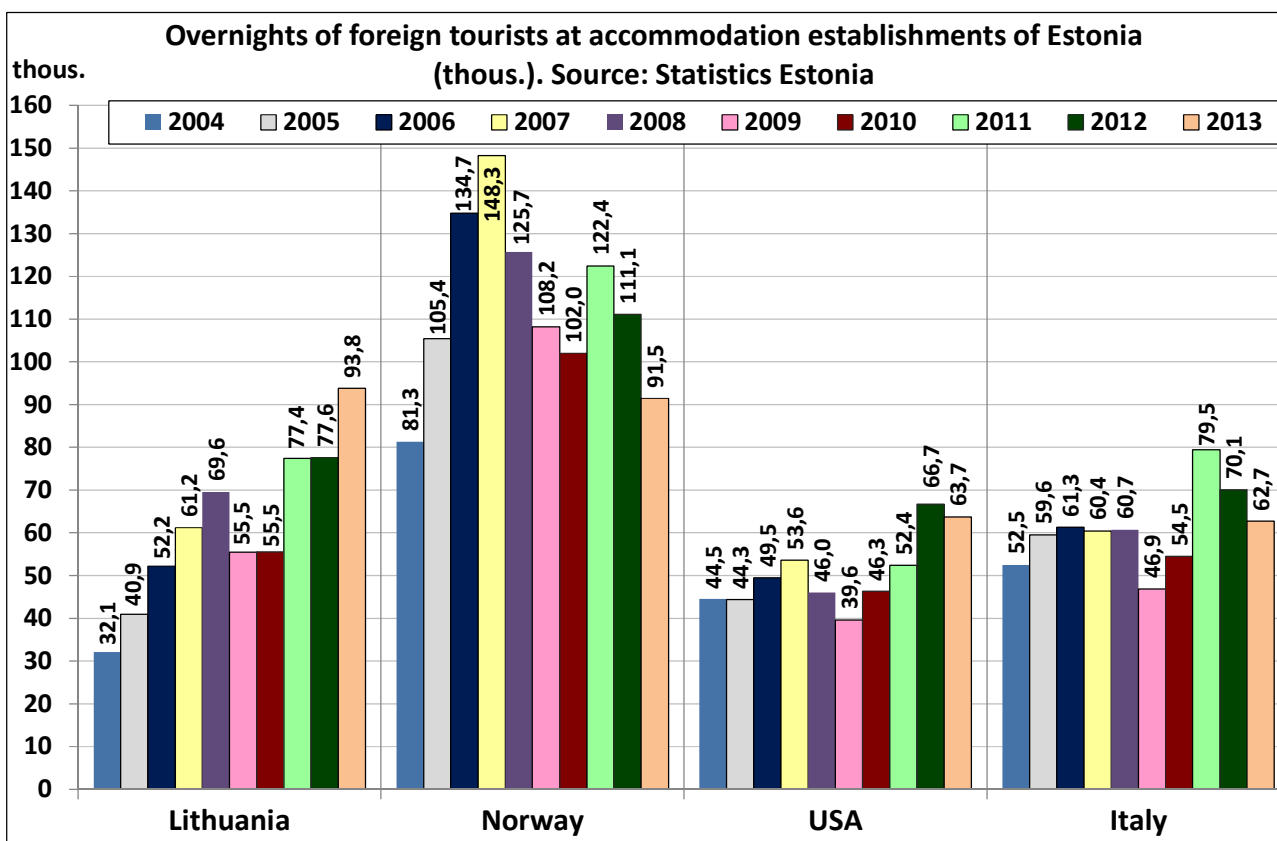
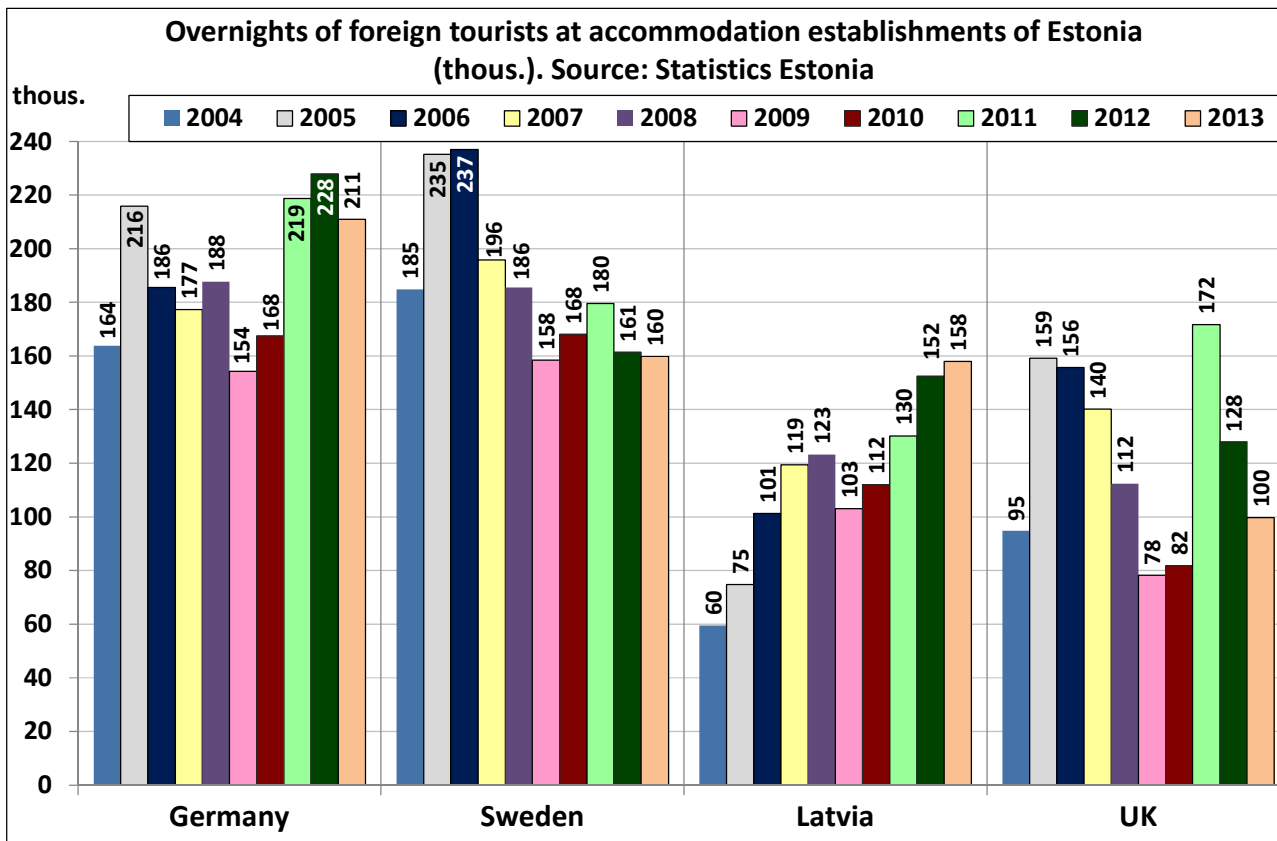


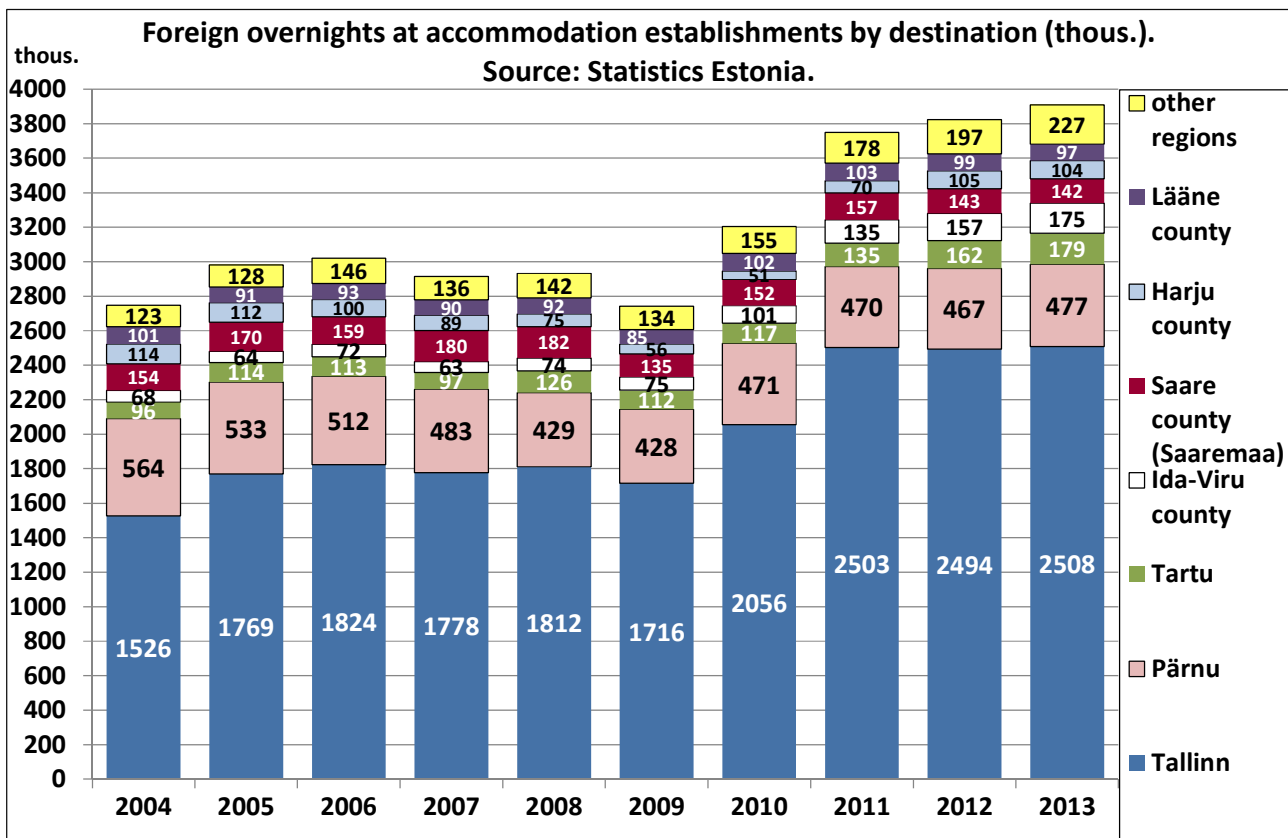
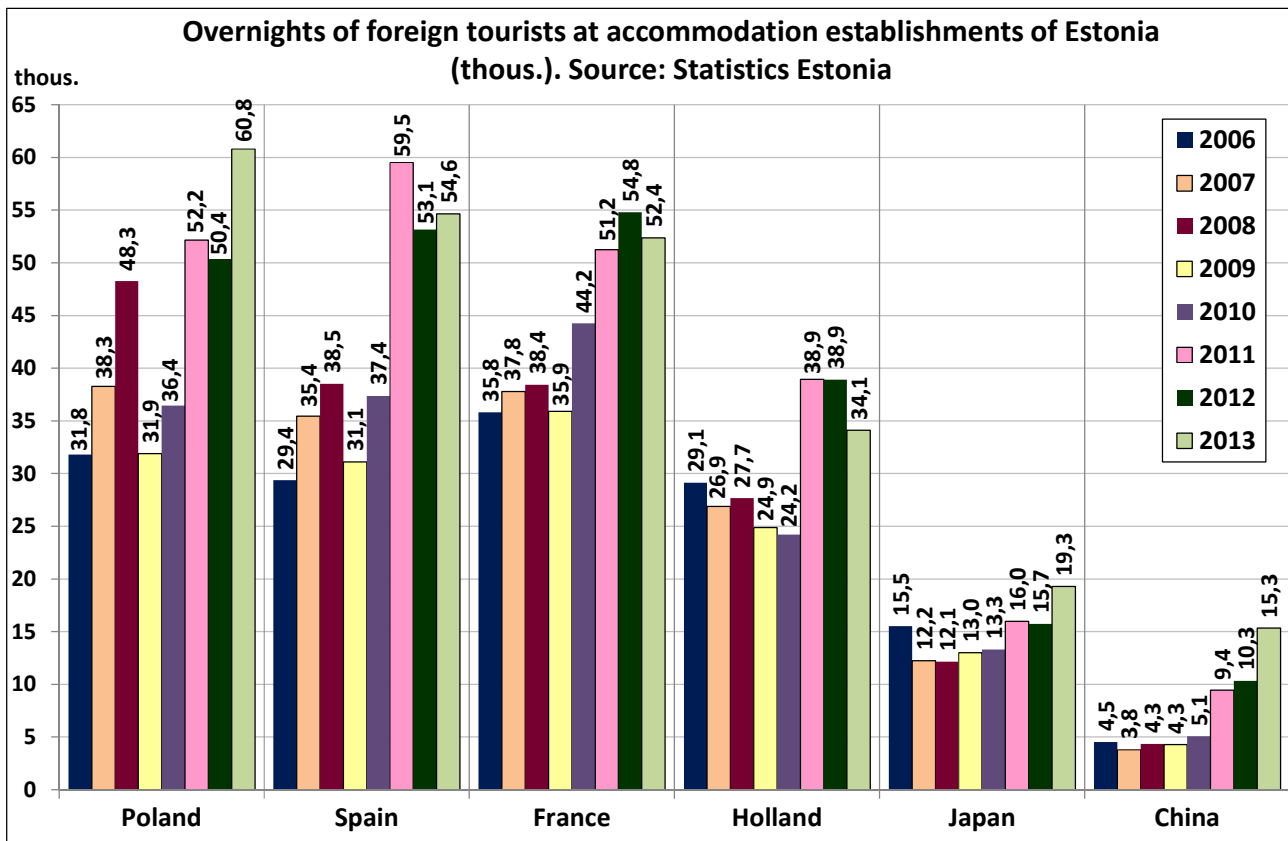
This indicates an increase in ADR (average daily rate) and means that in some months ADR already slightly exceeded the pre-crisis level for the first time.

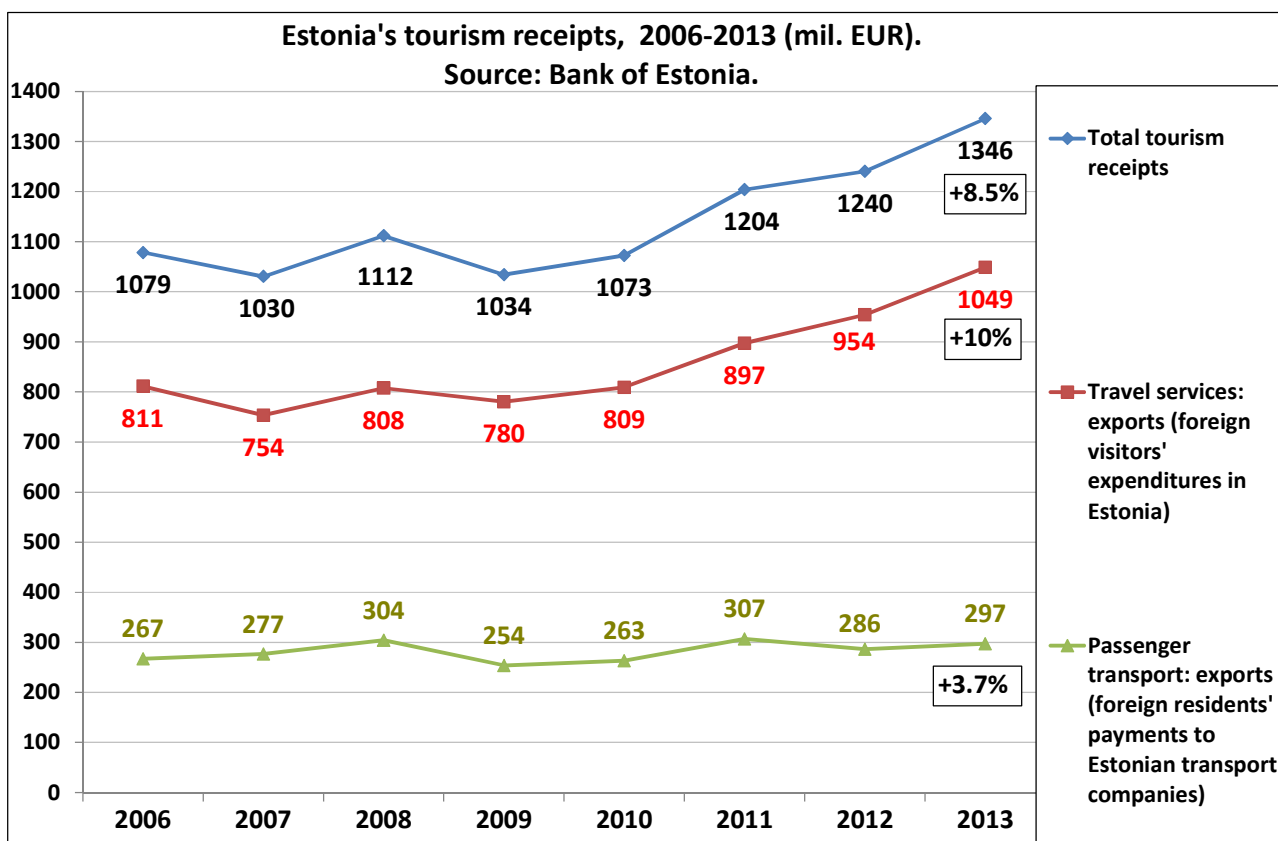
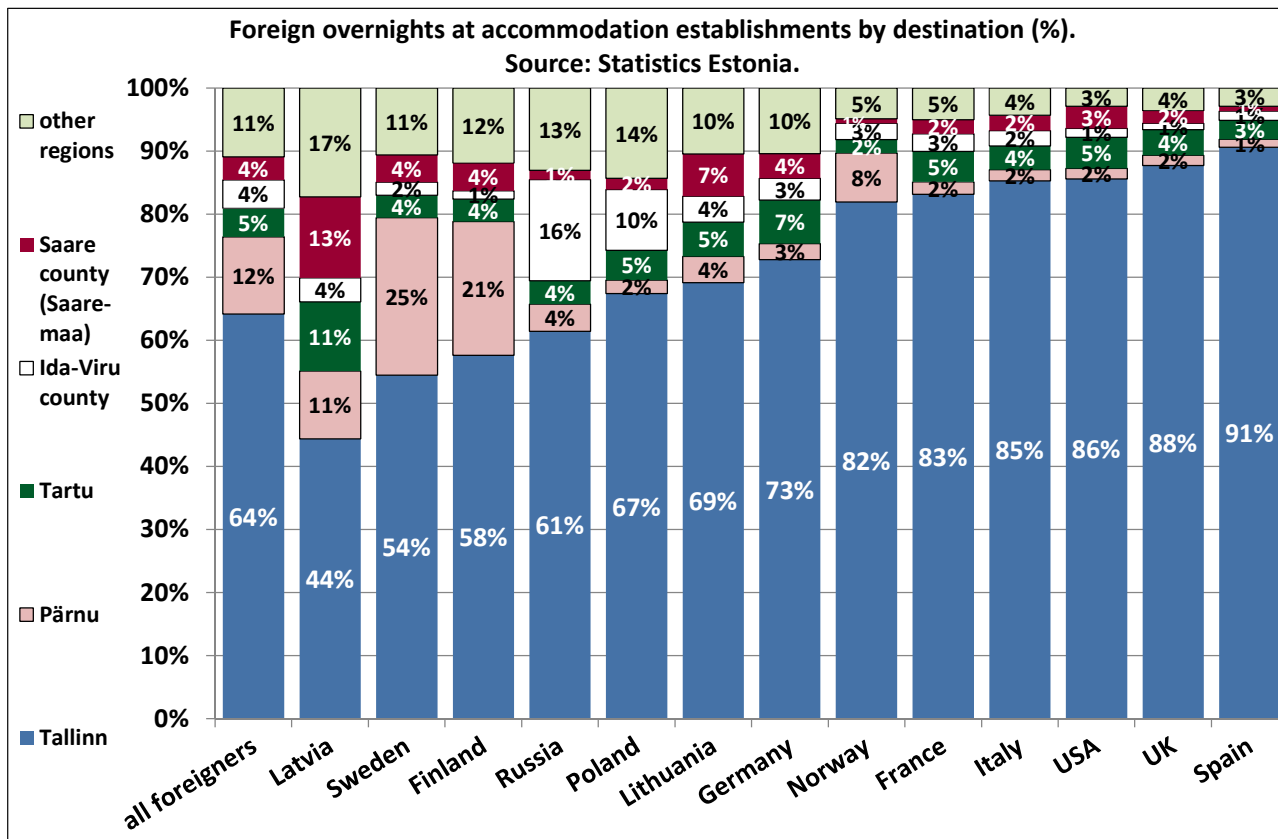












Arrivals and overnights at all accommodation establishments of Estonia by country of residence, 2008-2013.

Source: Statistics Estonia.

	Arrivals at accommodation establishments						Year on year change			
	2008	2009	2010	2011	2012	2013	2011/10	2012/11	2013/12	2013/12
total	2 377 671	2 147 133	2 401 763	2 725 937	2 839 895	2 980 865	324 174	113 958	140 970	5%
domestic	944 325	766 593	837 811	918 018	966 376	1 040 735	80 207	48 358	74 359	8%
foreign	1 433 346	1 380 540	1 563 952	1 807 919	1 873 519	1 940 130	243 967	65 600	66 611	4%
Finland	728 181	750 984	832 874	840 714	829 225	894 504	7 840	-11 489	65 279	8%
Russia	82 280	93 947	141 964	203 204	266 192	304 644	61 240	62 988	38 452	14%
Latvia	79 527	68 320	72 684	85 229	100 638	105 480	12 545	15 409	4 842	5%
Germany	91 915	75 966	84 454	103 559	111 251	101 596	19 105	7 692	-9 655	-9%
Sweden	86 308	77 470	81 196	86 287	78 412	74 313	5 091	-7 875	-4 099	-5%
Lithuania	41 396	33 441	34 107	47 003	47 397	52 201	12 896	394	4 804	10%
UK	46 575	33 395	35 692	69 912	54 305	43 109	34 220	-15 607	-11 196	-21%
Norway	47 240	40 915	40 414	51 510	48 479	36 918	11 096	-3 031	-11 561	-24%
USA	19 185	16 284	20 503	23 824	29 601	27 442	3 321	5 777	-2 159	-7%
Italy	26 280	19 959	23 017	33 618	30 574	26 506	10 601	-3 044	-4 068	-13%
Poland	20 859	17 062	19 522	27 093	25 513	26 001	7 571	-1 580	488	2%
Spain	17 844	15 707	16 860	27 106	25 003	22 926	10 246	-2 103	-2 077	-8%
France	18 522	16 864	19 319	22 301	24 089	22 780	2 982	1 788	-1 309	-5%
Holland	12 533	11 595	11 713	17 968	18 279	16 358	6 255	311	-1 921	-11%
Denmark	14 281	12 036	11 140	13 902	14 091	11 900	2 762	189	-2 191	-16%
Japan	6 862	7 253	7 235	8 732	8 778	10 768	1 497	46	1 990	23%
China	1 895	2 058	2 823	5 549	5 934	7 806	2 726	385	1 872	32%

	Overnights at accommodation establishments						Year on year change			
	2008	2009	2010	2011	2012	2013	2011/10	2012/11	2013/12	2013/12
total	4 602 212	4 122 526	4 700 680	5 399 392	5 544 537	5 734 033	698 712	145 145	189 496	3%
domestic	1 669 550	1 381 830	1 496 959	1 650 527	1 721 498	1 824 707	153 568	70 971	103 209	6%
foreign	2 932 662	2 740 696	3 203 721	3 748 865	3 823 039	3 909 326	545 144	74 174	86 287	2%
Finland	1 415 884	1 416 113	1 664 139	1 677 119	1 651 965	1 691 035	12 980	-25 154	39 070	2%
Russia	198 319	220 945	330 276	475 905	593 783	679 343	145 629	117 878	85 560	14%
Germany	187 665	154 260	167 508	218 698	227 959	210 955	51 190	9 261	-17 004	-7%
Sweden	185 592	158 492	168 165	179 523	161 460	159 813	11 358	-18 063	-1 647	-1%
Latvia	123 299	103 091	112 122	130 154	152 491	158 031	18 032	22 337	5 540	4%
UK	112 423	78 322	81 791	171 748	127 969	99 742	89 957	-43 779	-28 227	-22%
Lithuania	69 555	55 465	55 535	77 428	77 585	93 784	21 893	157	16 199	21%
Norway	125 683	108 207	102 019	122 443	111 131	91 451	20 424	-11 312	-19 680	-18%
USA	46 014	39 610	46 305	52 387	66 725	63 690	6 082	14 338	-3 035	-5%
Italy	60 692	46 856	54 451	79 455	70 070	62 700	25 004	-9 385	-7 370	-11%
Poland	48 254	31 878	36 442	52 153	50 351	60 788	15 711	-1 802	10 437	21%
Spain	38 510	31 089	37 369	59 527	53 144	54 633	22 158	-6 383	1 489	3%
France	38 416	35 908	44 236	51 223	54 790	52 368	6 987	3 567	-2 422	-4%
Holland	27 662	24 876	24 227	38 930	38 906	34 117	14 703	-24	-4 789	-12%
Denmark	31 684	25 725	23 489	27 928	27 887	24 174	4 439	-41	-3 713	-13%
Japan	12 143	12 998	13 303	15 967	15 723	19 272	2 664	-244	3 549	23%
China	4 344	4 268	5 057	9 429	10 337	15 339	4 372	908	5 002	48%