TOURISM IN ESTONIA, JAN-AUG 2018 (as of 8 Oct 2018)

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- During the first 8 months of 2018, 2.53 million foreign and domestic tourists stayed overnight in the accommodation establishments of Estonia (46,113 or 2% more than a year ago). The number of foreign tourists amounted to 1.52 million (0.4% more than a year ago) and the number of domestic tourists to 1.01 million (+4.2%).

- The number of nights spent by foreign and domestic tourists in the accommodation establishments amounted to 4.69 million (113,352 or 2.5% more than a year ago). Foreign tourists spent 2.95 million overnights (47,609 or 1.6% more than a year ago) and domestic tourists spent 1.74 million nights (65,743 or 3.9% more than a year ago).

- Overnights by foreign tourists reached a new record for the third consecutive year and overnights by domestic tourists for the sixth consecutive year.

- Of all the nights spent in the accommodation establishments, domestic overnights accounted for 37%, Finnish overnights 23%, Russian overnights 7.6%, German overnights 4.3% and Latvian overnights 3.5%. Swedish and UK overnights both accounted for 2%. The share of domestic overnights continued to increase slightly, as domestic tourism increased slightly faster than inbound tourism.

- In absolute figures, the domestic market showed the biggest increase, followed by Russia, the UK and Japan. On the other hand, tourism from Finland showed the biggest decrease in absolute figures. The increase from the UK was related to some additional air connections from London to Tallinn. The overnights of Japanese tourists reached a new record for the 7th consecutive year, reflecting the active promotion of Estonia and improved air access via Helsinki Airport.

- By month, domestic tourism showed the biggest increase in July (+6%) and August (+7%). On the contrary, inbound tourism showed the biggest increase in the first quarter, especially in January. Overnights from Russia (the biggest inbound market in January) increased by as much as 19% in January, thanks to additional New Year trips. Also, several other markets (e.g. Finland, Japan and the UK) showed very good results in January.

- During the first 5 months, foreign overnights increased by 5%. The summer season, on the other hand, was rather weak. In June, foreign overnights increased by 0.3% and in August by 0.5%. In July, foreign overnights decreased by 3%. The main reason for this result is a rather substantial decrease in Finnish overnights (-11% in July and -14% in August). Furthermore, tourism form Latvia also showed a small decline in the summer season. Tourism from Russia increased in the summer season but at a slower pace than in the first months of 2018.

- During the first 8 months, 593,729 Finnish tourists stayed in the accommodation establishments of Estonia, their overnights amounted to 1.1 million. Compared to the same period of 2017, both figures decreased by 8% (meaning 52,000 tourists and 96,000 overnights less than during the first 8 months of 2017). The decrease is mostly connected with the decreasing attractiveness of Tallinn — over 2/3 of the decrease in absolute figures can be attributed to Tallinn. The decrease is connected with the increase of hotel prices and the prices of other goods and services in Estonia, as well as increased competition from other European destinations. In Tallinn, their overnights decreased by 10%. In the rest of Estonia, the decline was slightly smaller (6%).

- Russia showed the best result among the inbound markets. During the first 8 months, 170,688 Russian tourists stayed in the accommodation establishments of Estonia, their overnights amounted to 357,848. Compared to the same period of 2017, both figures increased by 8%. In absolute figures, their overnights showed the biggest increase in Tallinn and in North-East Estonia (Ida-Viru County) — their most popular destinations in Estonia.

- 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. Compared to the record level of 2013, in 2018 their overnights in Estonia are still 25% down because the decline in 2014 and 2015 was so severe. In Tallinn, the number of Russian overnights is currently 32% down on the record level achieved in 2013. On the other hand, the accommodation establishments in North-East Estonia (Ida-Viru) 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 and in 2018, they already exceeded the record level of 2013 by 13%.
Overnights in accommodation establishments of Estonia, Jan.-Aug. (000)

Sources: Statistics Estonia.
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