

Tourism Sector in Estonia

Updated on 11th December 2024

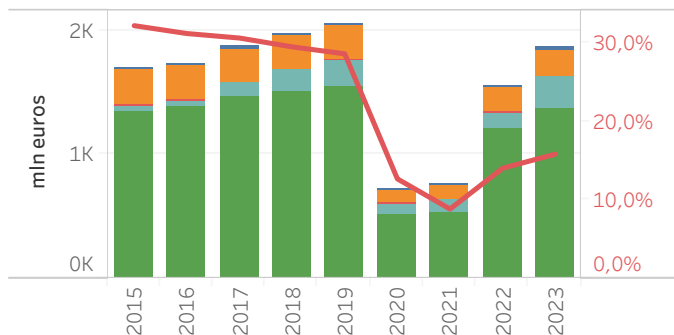
Sustainability (as of May 2024)

- In 2023, Estonia ranked 4th in the world in the **Sustainable Travel Index**.
- There are 76 tourism businesses in Estonia with **Green Key** certification.
- Three national parks and 19 tourism businesses within national park areas in Estonia hold the **Europarc** certificate.
- In Estonia, seven destinations are part of the **Green Destinations** network: Hiiumaa, Järvamaa, Lahemaa, Pärnumaa, Saaremaa, and Tartu City. All seven destinations are featured in the Top100 success stories list.

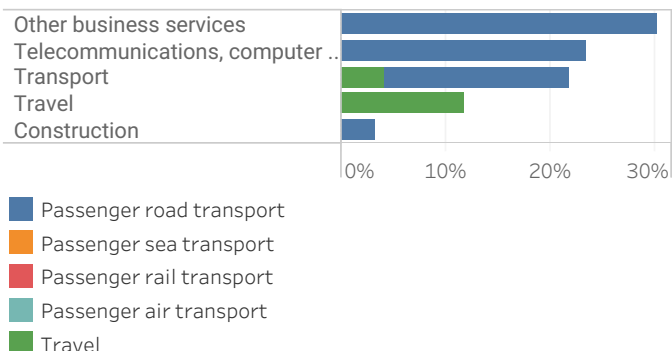
GDP, Value Added, and Exports

- According to Statistics Estonia estimates, tourism share in GDP was 5,4% (direct impact), together with indirect impacts 7,9% (2017). Ministry of Economic Affairs and Communications estimates that in 2023 tourism contributed directly and indirectly 5-7% of GDP.
- In 2022, the accommodation and food service activities contributed 1,6% of the total value added in the economy (compared to 2% in 2019).
- For every euro generated in the tourism sector, it creates 0.45 euros of **value added in other sectors**.
- Tourism services (including passenger transportation services and travel services, i.e. visitor expenditures in Estonia) accounted for 15,9% (1,9 bln euros) of the **total service exports** in 2023. aastal (compared to 28,7% in 2019).

Exports of Tourism Services



Service Exports in 2023



Tourism services encompass travel services and, a subset of transportation services (passenger transportation services).

- In 2023, foreign visitors (incl same-day visitors) **spent** in Estonia **1,4 bln euros**. Export revenue from passenger transport was **482 mln euros**.

Tax Revenue

- According to the Tax and Customs Board, accommodation and food service establishments, as well as travel agencies and tour operators, paid a total of 228,8M € in national taxes in 2023, including labour taxes amounting to 145,2M €.
- From every euro spent by tourists, 0.33 euros contribute to taxes.

Passenger Transportation

- In 2023, Tallinn Airport served 2,95 mln passengers (1,47 mln arrivals and 1,48 mln departures). In 2023, there were 44 scheduled flight destinations.
- In 2023, Estonian ports handled 8,02 mln passengers on international routes - 3,93 mln departed to foreign destinations, and 4,09 mln arrived from abroad, including 162 tuhat cruise ship passengers. TS Laevad served 2.41 million passengers on the Saaremaa and Hiiumaa routes.

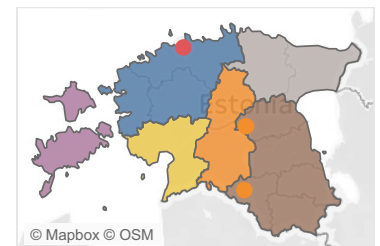
Tourism Enterprises (Accommodation, Food and Beverage Service Activities, Travel Agencies and Tour Operators)

- According to business statistics, in 2022, tourism enterprises (including accommodation, food and beverage service activities, travel agencies and tour operators) accounted for 3,3% of all business units.
- These tourism enterprises contributed 2,2% to the value added in the business sector.
- The number of people employed in tourism enterprises (26 225 individuals) represented 4,8% of all those employed in businesses.

Other information

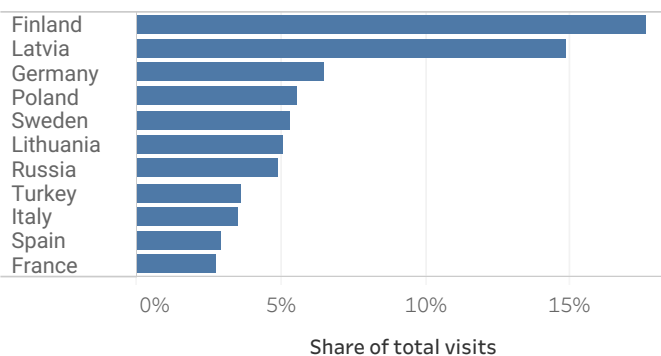
- **The Michelin restaurant guide** includes 35 restaurants in Estonia as of May 2024. Among them, 180° by Matthias Diether has two Michelin stars, and NOA Chef's Hall has one Michelin star.

- There are 7 **destination management organizations (DMOs)** with their tourism objectives.

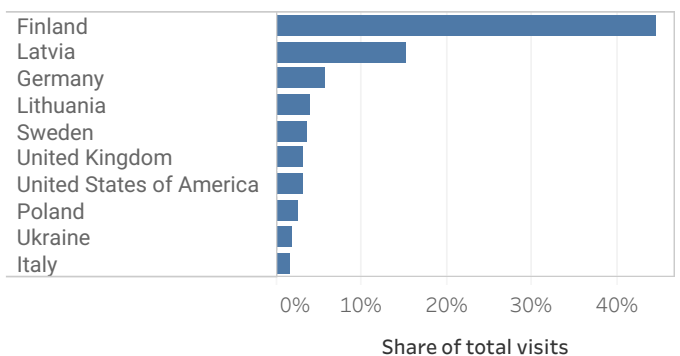


- In 2023, the top travel destinations for Estonian residents were Finland, Latvia, and Germany. The same countries were in the top three for inbound travellers to Estonia.

Outbound travel



Inbound travel



- Tourists spent a total of 6,37 mln **nights** (3,4 mln by international tourists and 3,0 mln by domestic tourists) in Estonian accommodation establishments with at least five beds in 2023 (compared to 7,0 mln nights in 2019). In 2023, the most nights were spent by tourists from the following countries:

Country	Number of nights spent	Share in total nights spent	Share in foreign tourists' nights spent
Estonia	3,00 mln	47,1%	
Finland	1,30 mln	20,4%	38,5%
Latvia	0,37 mln	5,7%	10,8%
Germany	0,21 mln	3,2%	6,1%
Lithuania	0,13 mln	2,1%	3,9%
United Kingdom	0,12 mln	1,9%	3,6%
Sweden	0,10 mln	1,6%	3,1%
United States	0,10 mln	1,5%	2,9%
Norway	0,04 mln	0,7%	1,3%
Russia	0,04 mln	0,6%	1,1%

