

Visit Estonia for SMAL

visit
estonia

Margus Sameli, Director
Malle Kolnes, B2B Client Manager Finland
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tourism in Estonia

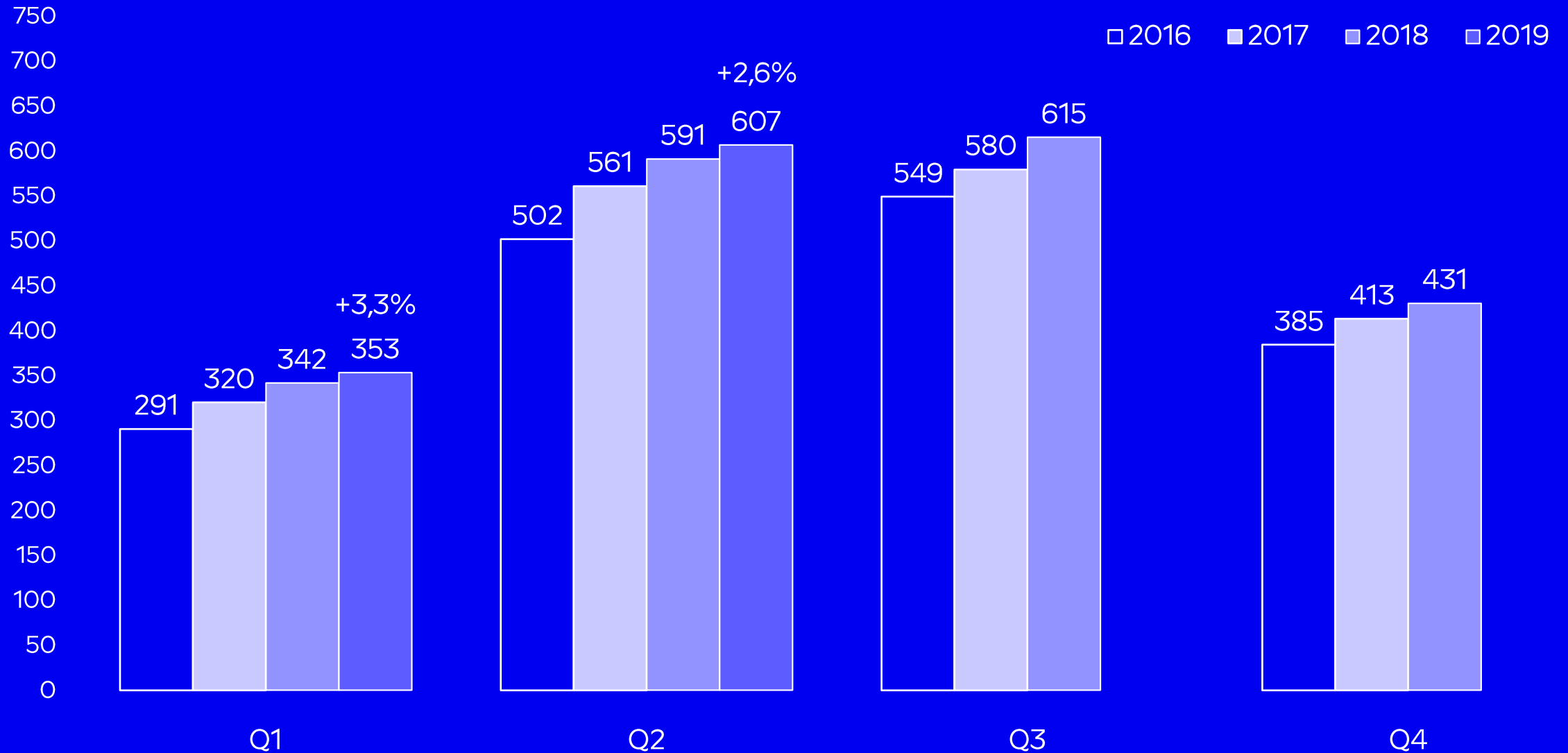
- tourism receipts amounting 1.98 billion EUR in 2018 (target for 2023 is 2.6 billion)
- contribution of travel and tourism services to GDP is 8% and 22.446 persons are employed in the tourism industry**
- an engine for regional development, a gate to labour market for young people, it gives possibility for entrepreneurship and connects with the world
- destinations with good environment for visitors suit also for living, science and business, are good for establishing family life and make inhabitants proud of their neighbourhood

Source:

*Bank of Estonia

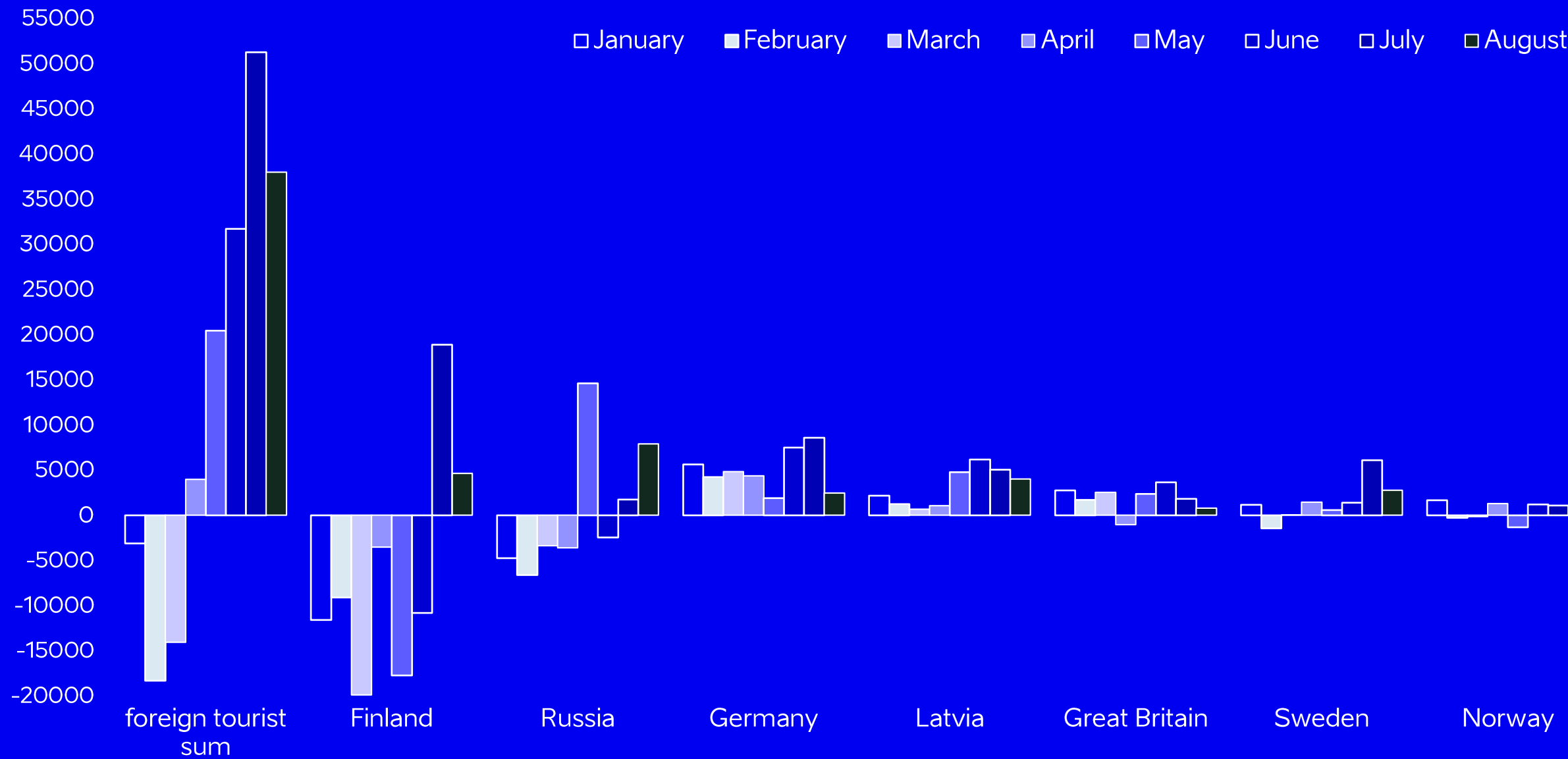
**2014 Statistics Estonia

export of tourism services, M eur



Source: Central Bank. % indicates a change from the previous year

foreign tourists' overnight stay 2019/2018 7 TC's

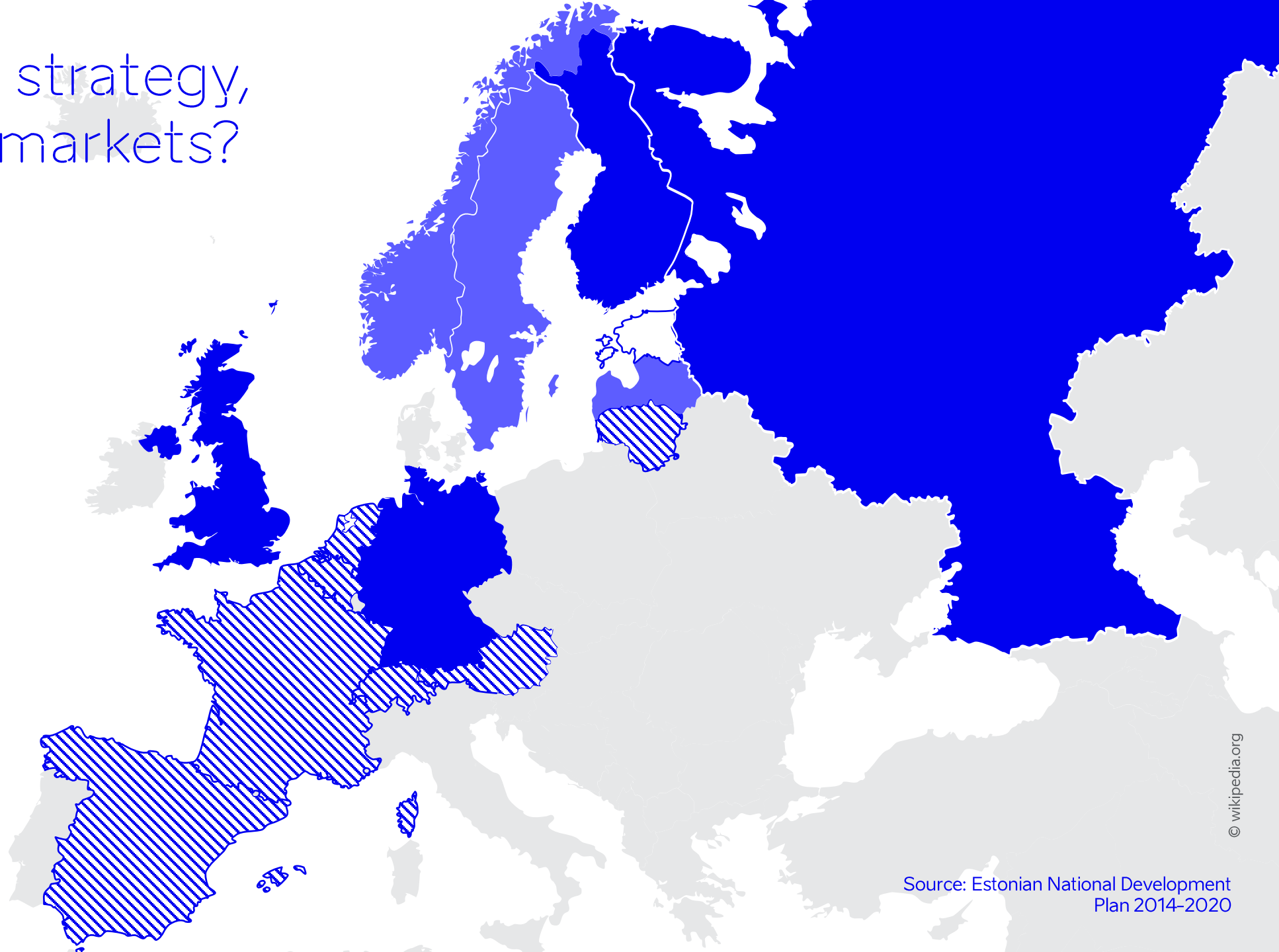


Source: Statistics Estonia. The numbers show the change in absolute figures compared to the same month of the previous year.

destination strategy, new target markets?

INTERCONTINENTAL
MARKETS:

Japan
China
USA

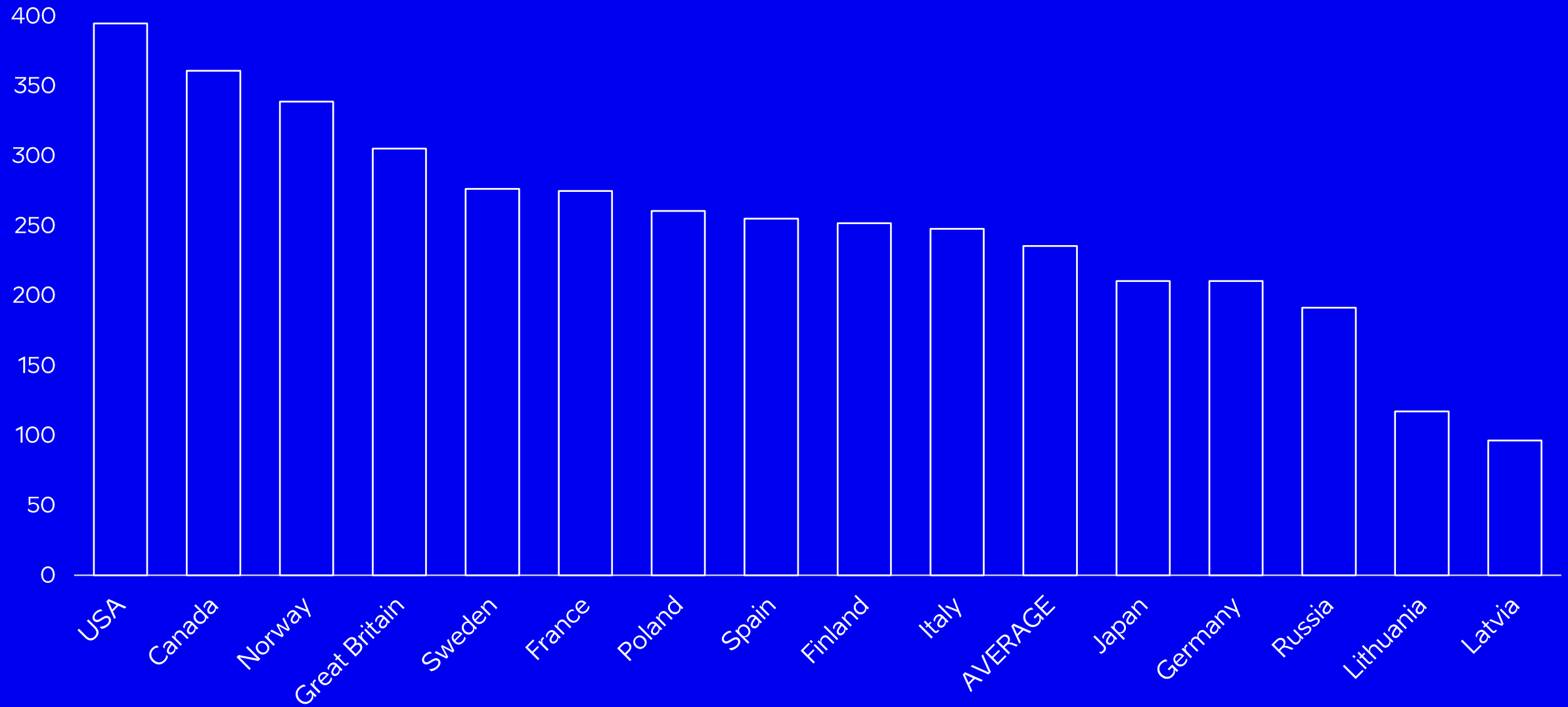


target markets – prognosis 2,6 Bn euro by 2023

	2017	2018	2019	2020	2021	2022	2023	Growth 2023/17 (% & mln)		Annual Growth
Finland	575	565	573	590	600	610	620	8%	100	3,4%
Russia	172	163	173	180	185	190	195	13%	65	3,4%
Germany	93	104	103	110	115	120	125	30%	47	11%
USA	80	90	79	85	90	95	100	25%	28	15%
Sweden	63	66	64	66	68	70	72	14%	9	3%
Latvia	64	68	72	76	80	84	88	36%	36	8%
Great Britain	43	45	40	42	44	46	48	11%	12	6,4%
Spain	30	29	32	35	38	41	44	46%	13	8%
Poland	27	31	33	35	37	39	41	52%	17	8%
Norway	23	21	20	21	22	23	24	4%	-0,4	2%
Japan	21	22	25	27	29	31	33	57%	11	8%
France	22	24	26	28	30	32	34	55%	13	8%
Italy	21	23	25	27	29	31	33	57%	12	8%
Lithuania	19	21	22	23	24	25	26	37%	12	8%
Canada	15	16	16	17	18	19	20	33%	6	6%
Other markets	197	226	235	250	260	270	280	41%	112	8%

Source: Data for 2017 from Bank of Estonia, forecast by Enterprise Estonia. The forecast only shows the export of travel services, i.e the expenditure of foreign residents in Estonia. The assumption is that passenger transport export will grow at an average rate of 7% per year over the period 2017-2023.

conditional average expenditure per visitor (euro)



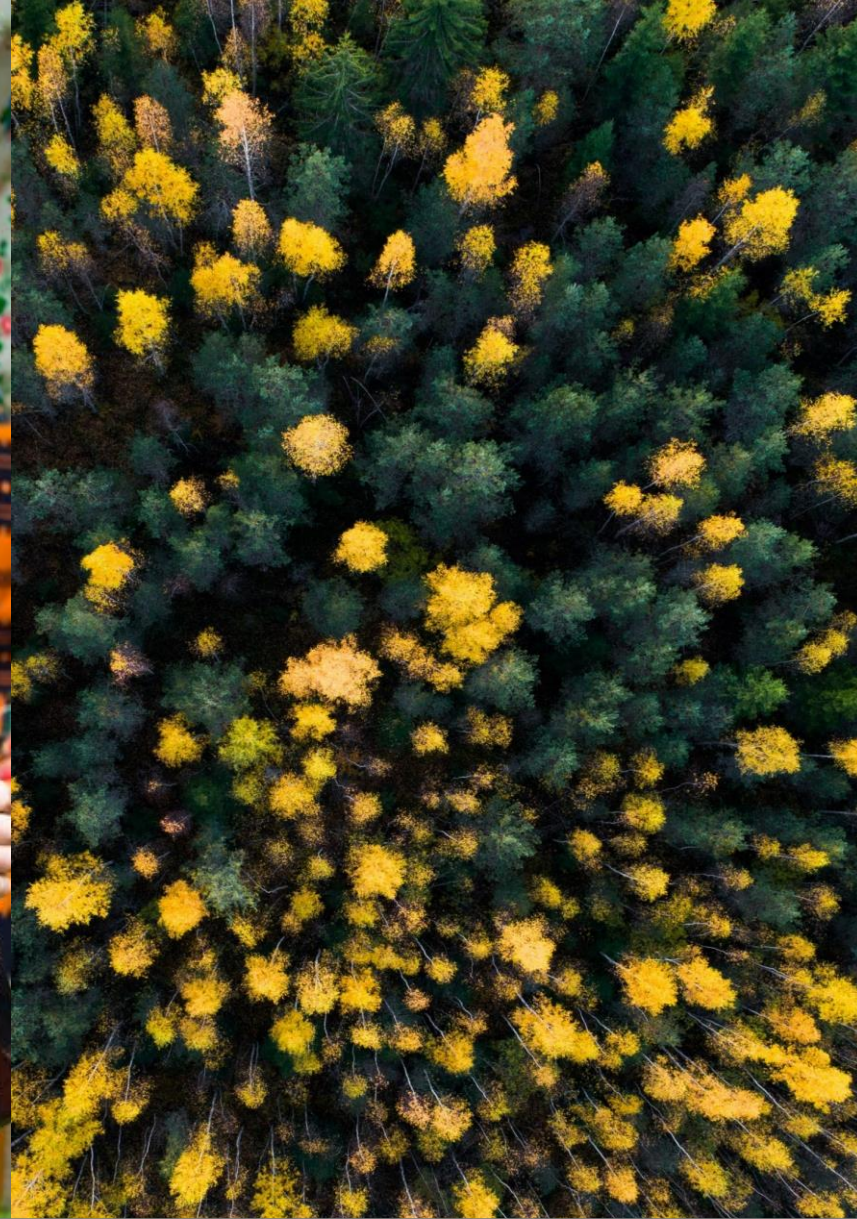
Source: Bank of Estonia. A conditional average does not take into account differences between same-day and overnight visitors



food



authentic culture



nature

opportunities:

- **nature and general image of tourism** — Estonia's success is based on the positivity of all parties, on pride of unique identity of destinations and in joint action creating positive visitors' experience and motivation for return visits.
- **datafication** — due to the structure of Estonian tourism, our future cannot be based on quantity i.e. multiplying the number of first-time visitors, but instead on creating a high-quality visitor experience for different consumer segments. Aim is to extend the visits as well as to generate word-of-mouth marketing, which results in increase of return visits to the same and new destinations in Estonia.





opportunities:

- **being smart** - Smart does not mean intelligent applications, new cutting-edge devices or programmes. Smart has to describe the whole business model, being part of the real-time economy.
- **destinations** - Smartly managed destinations are the prerequisites for the value chain of tourism in Estonia. Tourism is an emotion that grows with the place and local people. Today's landmarks are cognitive, i.e. instead of „physical concrete“, the key is the experience of it.



investments/money



destination/product



sales/marketing



counselling/mentoring



management



community/involvement



data/analysis



education/trainings

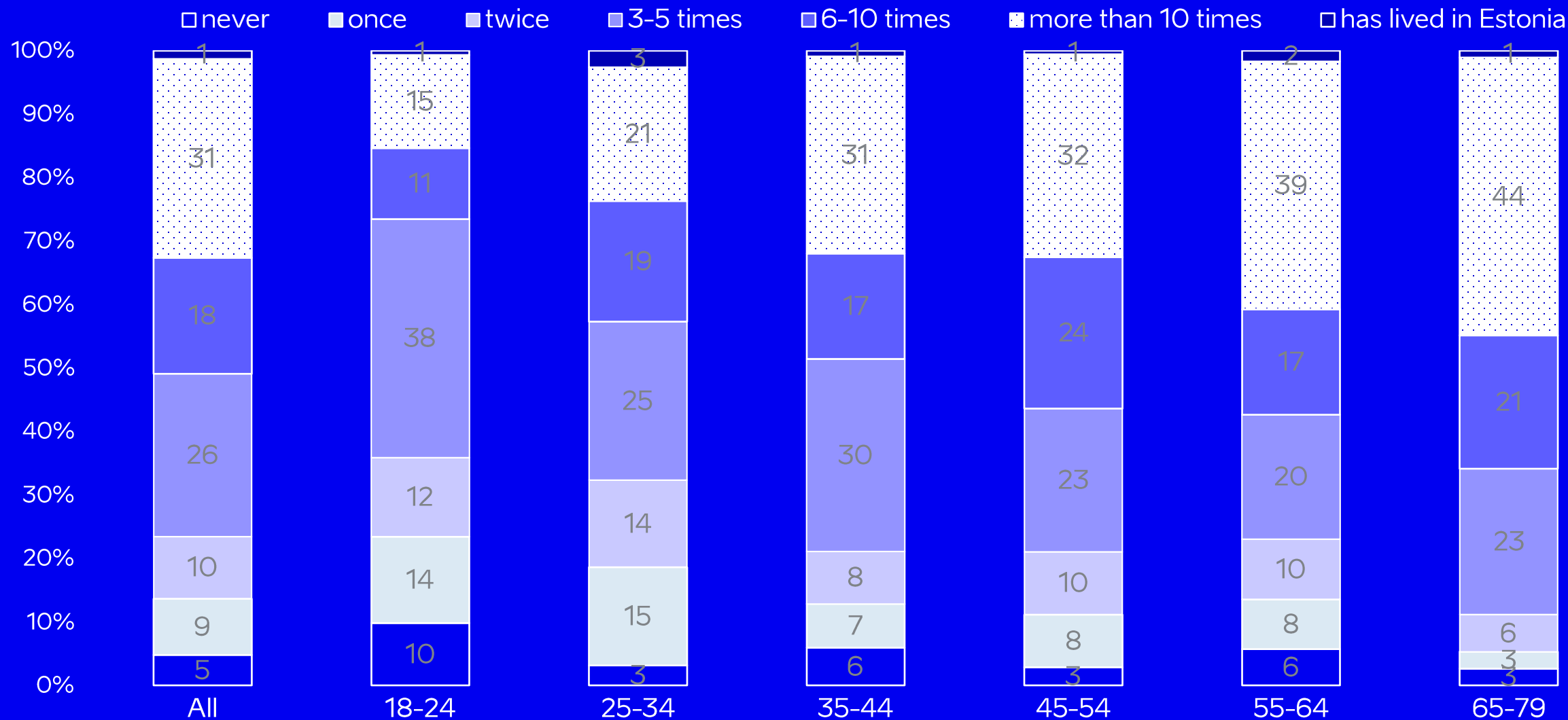


partnership/teamwork

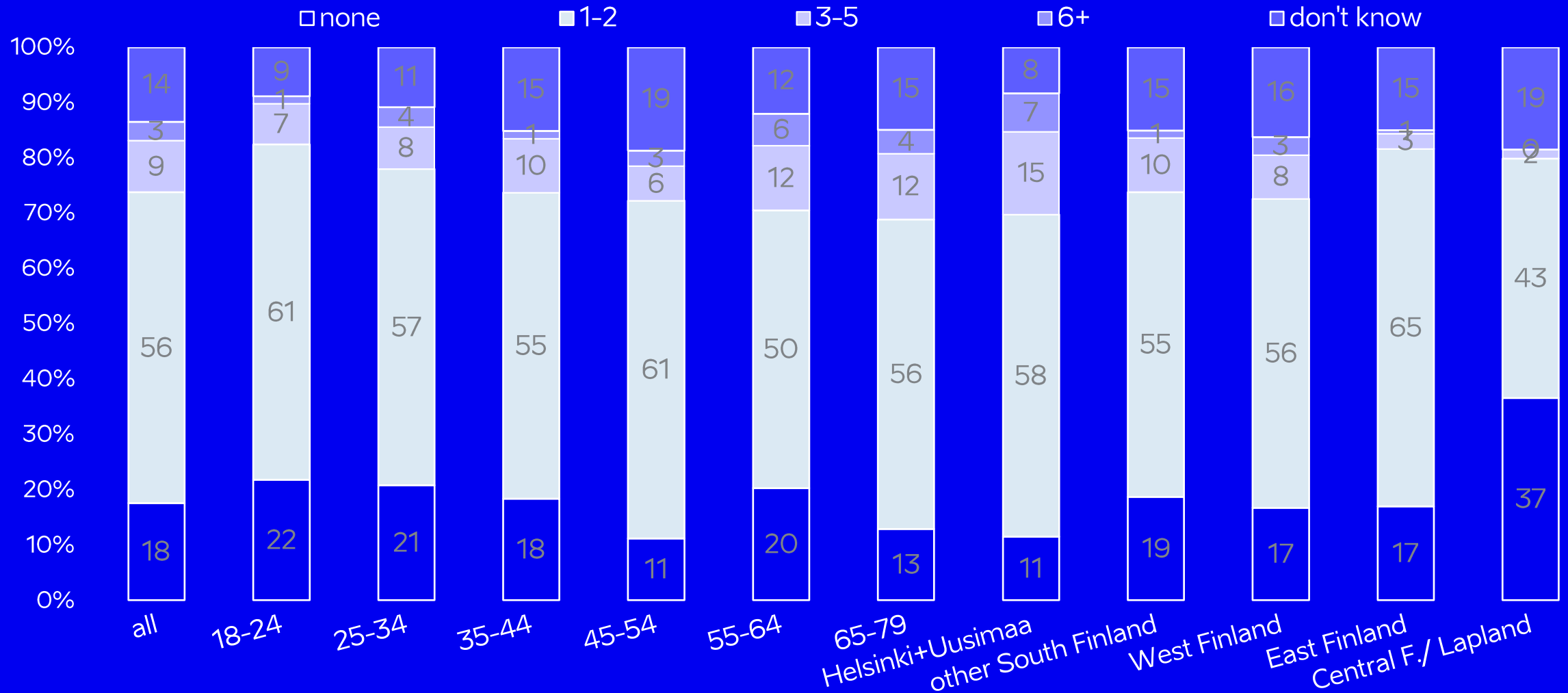
VISION of tourism in Estonia 2020 – 2035:

- The vision is to live a sustainable life in Estonia, which the locals are proud of and which is appreciated by foreigners.
- Estonian tourism must support the preservation and creation of a valuable and attractive living environment for the locals, ensuring a positive lifestyle and sustainability in the whole country.
- Local identity, highly-valued jobs in the region (for different abilities and ages), appreciation of the living environment (not only created one but also the natural environment) as well as sustainability are the basis of both domestic and foreign tourism. Enterprises of all sizes, local people, municipalities and the state will benefit from it.

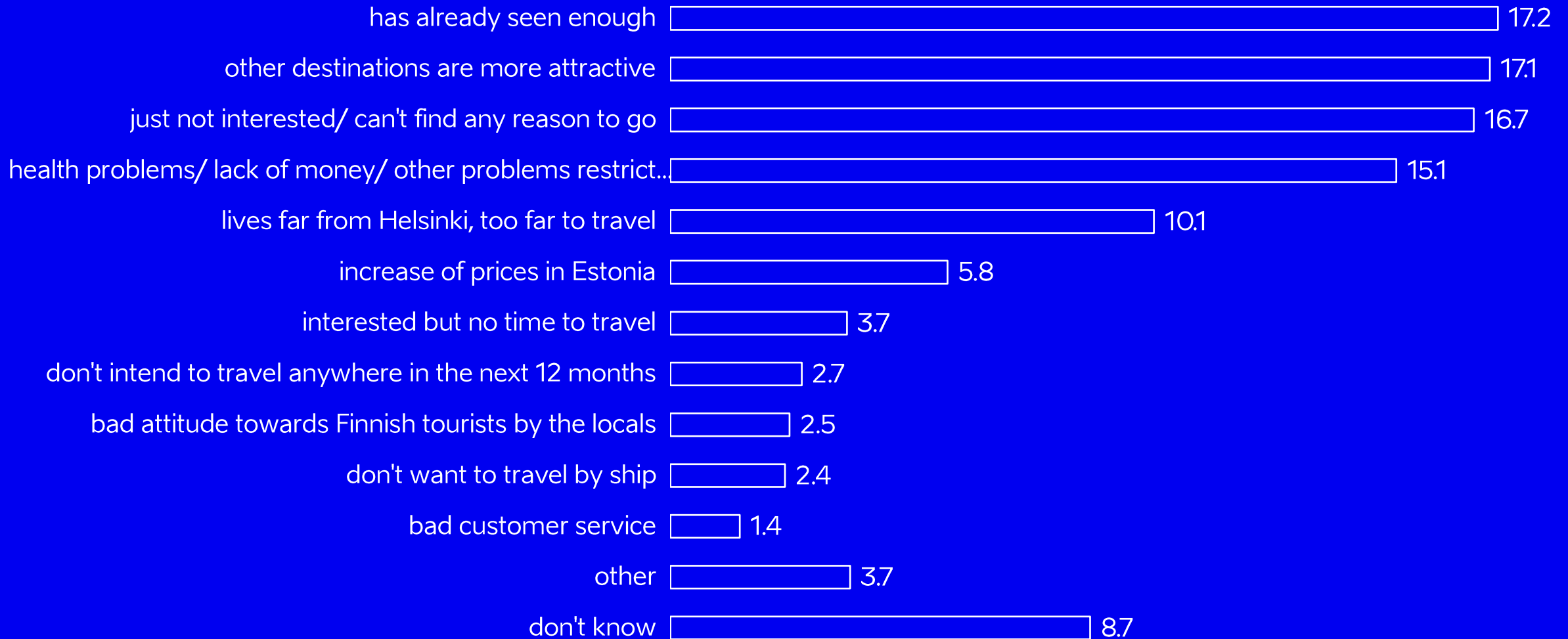
how many times have the Finnish residents visited Estonia?



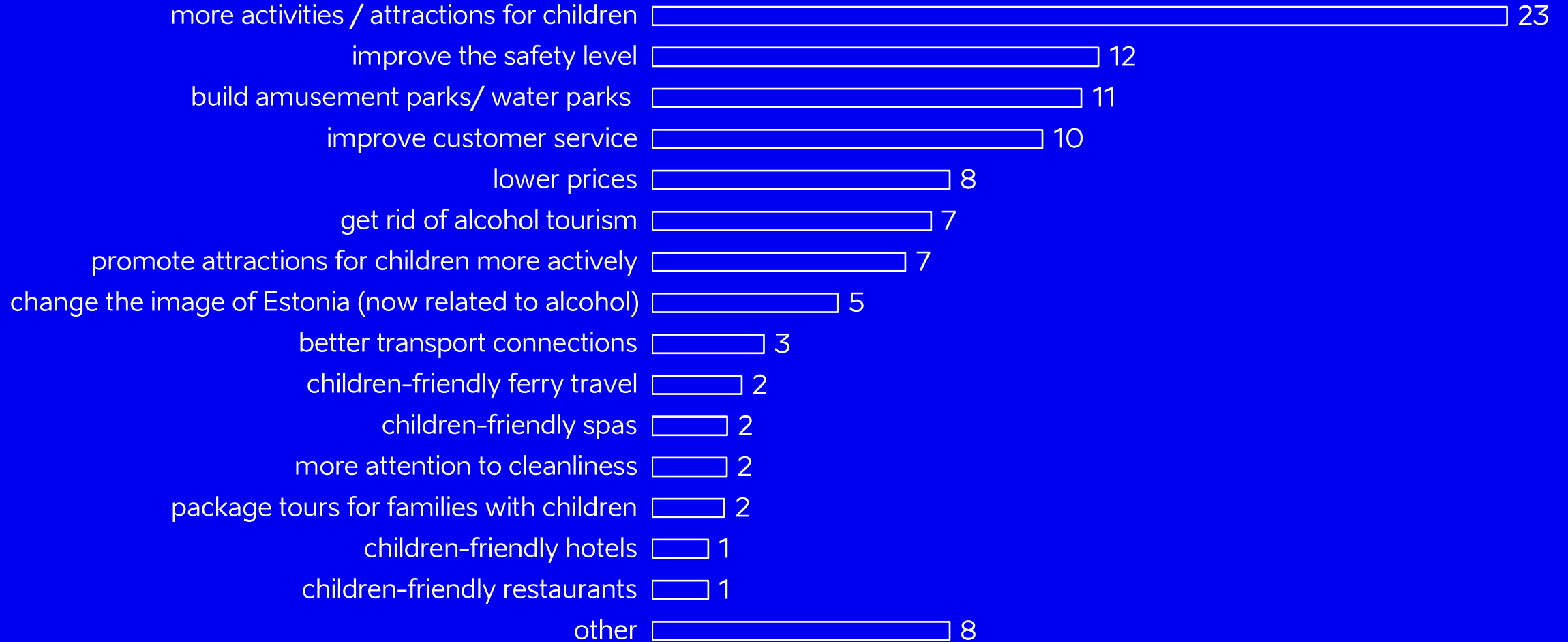
how many leisure trips to Estonia are you likely to take in the next 12 months?



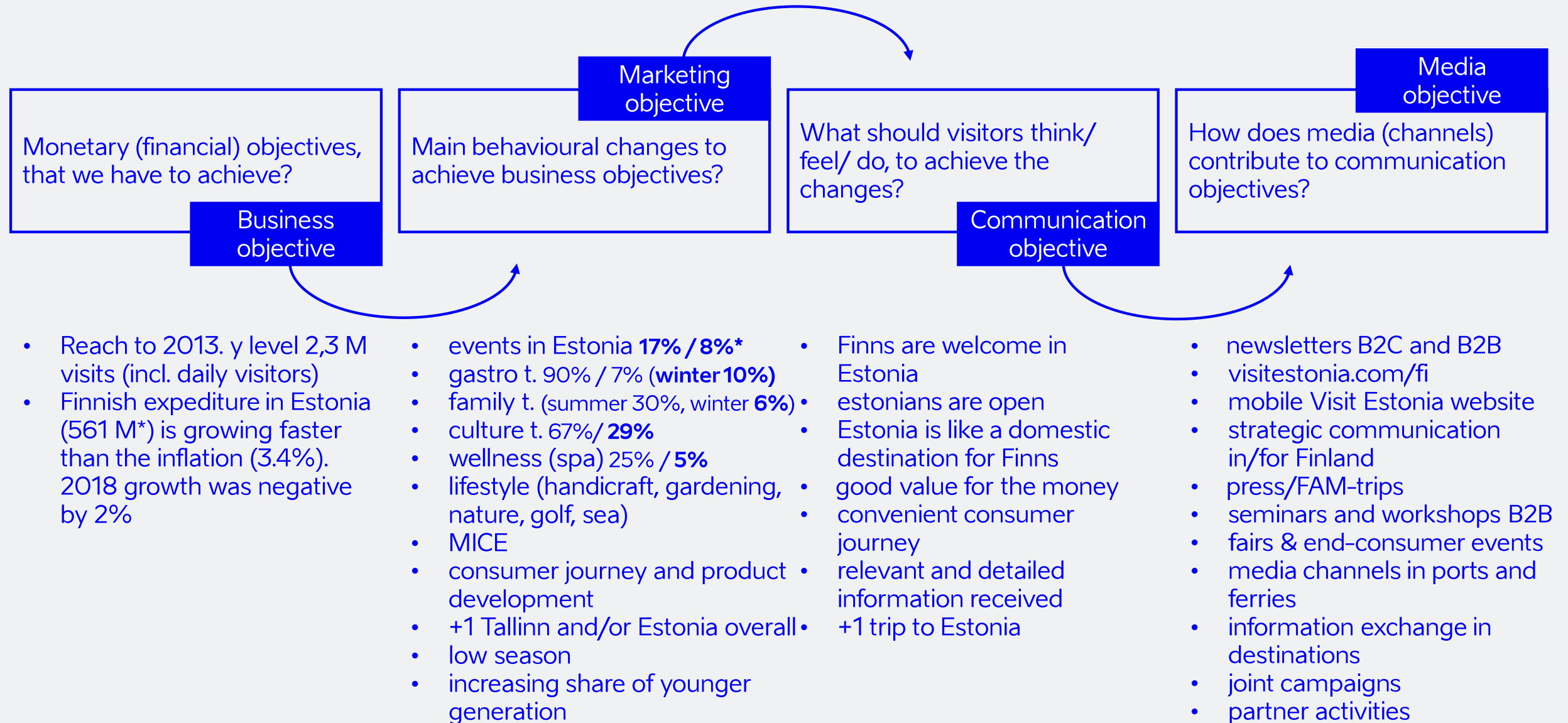
why are you not interested in visiting Estonia in the next 12 months? (% of respondents)



how to improve Estonia's attractiveness for families with children? (% of respondents)



targets for Finland 3-5 years



* 2018, doesnt include international transportation

* The real status 2016-2017 / what motivates to travel to Estonia

B2B survey + Meltwater

Source: Enterprise Estonia — Estonian Tourist Board



Koti > Professional

Viron matkailun edistämiskeskus



Hyvät yhteistyökumppanit,

tervetulua Visit Estonian / Viron matkailun edistämiskeskuksen ammattilaissivustolle!

Täällä kerromme jatkossa säännöllisesti Viron tärkeimmistä matkailu-uutisista, jaamme infoa ammattilaistapahtumista, välitämme majoitustilastoja sekä esittelemme hyödynnettävissäanne olevia markkinointimateriaaleja.

Suomalaismatkustajat Virossa vuonna 2018

Vuonna 2018 Viron majoitusliikkeissä majoittui 834 993 suomalaista matkailijaa (-9%), jotka viettivät Virossa yhteensä 1,54 miljoonaa yötä (-9%). Majoitusliikkeiden ohella ja sijasta yhä useampi kävijä valitsee yövympaikaan hankkimansa tai vuokraamansa yksitvisasunnon tai hyödyntää Airbnb-

Tilaa uutiskirje

> Matkailun edistämiskeskus

> Yhteystiedot

> Uutiset ja tiedotteet

▼ Markkinointimateriaalit

> Esitteet, tapahtumakalenteri, uutiskirjeet

> Valokuvat

> Videot

> Tutkimukset ja tilastot





Kiitoksia!