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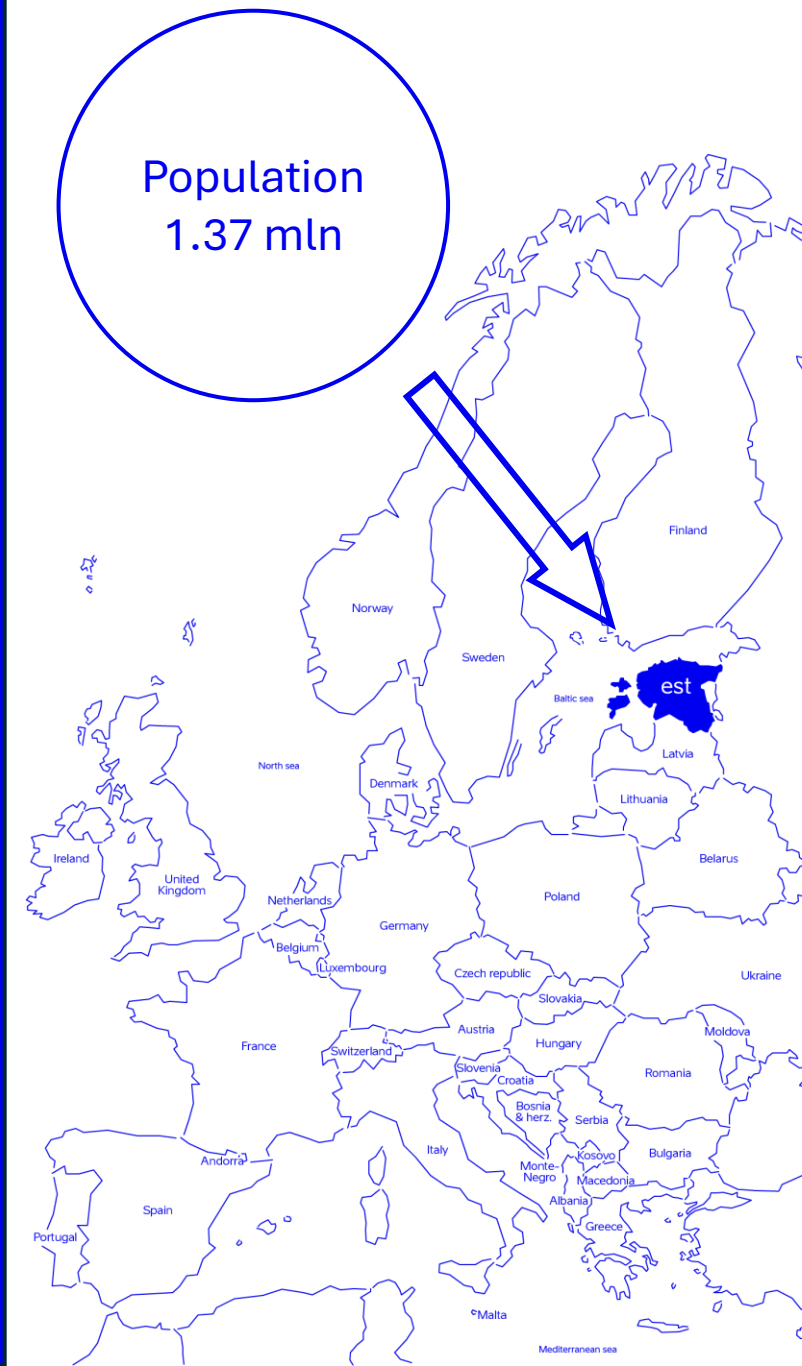
# The Long-Term Outlook for Estonian Tourism 2025–2035

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Interreg Europe, TIB, Braşov, Rumania, 12 May 2025







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# The Long-Term Outlook for Estonian Tourism 2025–2035

2023  
direct and indirect  
impact of tourism  
(% of GDP)  
around 5.3–7%

2024  
**all tourists**  
6.65 mln nights  
+4% (2023)  
-5% (2019)

Tourism export,  
% of export services  
2024 17.5%  
2019 29%





# Methodology of the Long-Term Outlook for Estonian Tourism 2025–2035

- **Strategic foresight methodology:** A participatory approach emphasizing collaboration and shared learning
- **300 participants engaged:** Through workshops, seminars, in-depth interviews, and an online survey
- **Sectoral economic analysis:** Comprehensive evaluation of the tourism sector's economic impact and trends
- **Broad-based research analysis:** In-depth review of scientific articles and studies to support evidence-based decision-making

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## The ambition of the Long-Term Tourism Outlook

### CREATING VALUE SUSTAINABLY

meaning that Estonian tourism must be not only profitable and competitive but also sustainable and future-oriented.

## VISION:

By 2035, Estonia will be a renowned, sustainable, and innovative destination offering products that meet expectations, having doubled the added value of tourism.







# Key Metrics

- Doubling the added value of the tourism economy.
- Increased satisfaction with tourism among Estonian **residents** and international visitors.



# Implementation:

- For the implementation of the long-term tourism vision, four-year action plans are developed
- Their execution is monitored by the Tourism Council, led by the minister responsible for tourism and involving various stakeholders

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For measuring the activities of the five pillars, the following targeted metrics have been set. Additionally, there are other metrics that we do not specifically target but continue to monitor:

