



Overview of Tourism Trends in Tallinn in 2015

Tallinn City Enterprise Board

Tourism Department

www.visittallinn.ee

Introduction

Tallinn's tourism overview is a regular publication examining tourism trends in the city which is published by the Tourism Department of Tallinn City Enterprise Board.

The overview presents a summary of tourism trends against the backdrop of the European and global contexts, as well as a more detailed look at the tourism statistics of Tallinn.

The overview covers:

- the number of foreign visitors to Tallinn;
- the number and countries of origin of tourists who stayed in accommodation establishments in the city;
- the purposes of visits to the city;
- the seasonal division of visits and trip lengths;
- figures from the accommodation market;
- the numbers of travellers served by Tallinn's Old City Harbour and the airport; and
- Tourist Information Centre visitor numbers and Tourism Web view statistics.

All data come from Statistics Estonia, the Bank of Estonia, the mobile positioning data of foreign visitors to Tallinn compiled by Positium LBS, the tourism-related information platform TourMis and publications of the World Tourism Organization (UNWTO), the European Cities Marketing (ECM) Benchmarking Report, Tallinn Airport and the Port of Tallinn.

Overview of tourism in Tallinn

Over half of the tourists who stayed in accommodation establishments in Estonia in 2015 spent the night in Tallinn.

A total of 3,112,143 tourists stayed in Estonian accommodation establishments in 2015, 1,579,491 of whom (51%) stayed in Tallinn.

1,579,491 tourists stayed in accommodation establishments in Tallinn in 2015 (a 1% decrease on the previous year).

Compared to 2014, there was an increase in the number of domestic tourists and a decrease in the number of international tourists.

Total accommodated 1,579,491 -1%↓

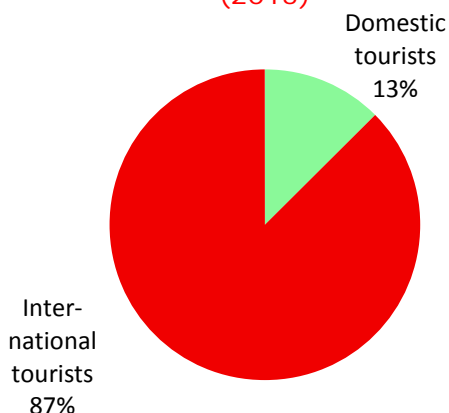
Incl.:

international tourists 1,381,575 -2%↓

domestic tourists 197,916 +4%↑

Of all tourists in 2015, international tourists accounted for 87% and domestic tourists for 13%.

Tourists accommodated in Tallinn (2015)



Visitors from the neighbouring countries of Finland (48%) and Russia (8%) dominated among international tourists. In numbers, the amount of tourists from Asian countries showed the largest increase (+12,900 tourists, i.e. +29%), while the number of tourists from Russia decreased most (-63,454 tourists, i.e. -36%).

Tourists accommodated by main country of origin

Finland	657,991	-1%↓	48% of all foreign tourists
Russia	113,600	-36%↓	8% of all foreign tourists
Germany	82,254	+3%↑	6% of all foreign tourists
Latvia	52,253	+21%↑	4% of all foreign tourists
Sweden	50,132	0%	4% of all foreign tourists
United Kingdom	40,704	+4%↑	3% of all foreign tourists
Norway	32,224	+6%↑	2% of all foreign tourists
Other	328,307	+10%↑	26% of all foreign tourists

Greatest increase:

Asia	+12,900	+29%↑
USA	+12,282	+44%↑
Latvia	+8,898	+21%↑
Germany	+2,605	+3%↑

Greatest decrease:

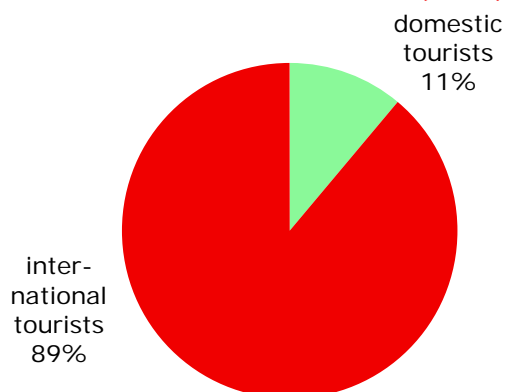
Russia	-63,454	-36%↓
Finland	-6,054	-1%↓
Poland	-2,157	-12%↓

Tourists spent a total of 2,790,993 nights in accommodation establishments in Tallinn (a decrease of 2% on the previous year).

Total nights spent:	2,790,993	-2%↓
incl.		
nights spent by international tourists	2,470,426	-3%↓
nights spent by domestic tourists	320,567	+1%↑

Nights spent by international tourists accounted for 89% and those by domestic tourists accounted for 11% of the total.

Overnight stays of tourists accommodated in Tallinn (2015)



Nights spent by tourists by main country of origin

Finland	986,830	0%	40% of all nights spent by foreign tourists
Russia	224,583	-38%↓	9% of all nights spent by foreign tourists
Germany	177,792	-2%↓	7% of all nights spent by foreign tourists
United Kingdom	90,978	4%↑	4% of all nights spent by foreign tourists
Latvia	83,056	19%↑	3% of all nights spent by foreign tourists
Sweden	80,889	-3%↓	2% of all nights spent by foreign tourists
Norway	72,521	2%↑	3% of all nights spent by foreign tourists
Other	753,777	+9%↑	31% of all nights spent by foreign tourists

Greatest increase:

USA	+36,109	+56%↑
Asia	+16,108	+21%↑
Spain	+18,955	+34%↑
Latvia	+13,477	+19%↑

Greatest decrease:

Russia	-138,383	-38%↓
Poland	-4,084	-11%↓
Germany	-3,603	-2%↓
Sweden	2,116	-3%↓

The average length of stay between January and December 2015 was 1.77 nights, which is shorter than in 2014 (-1%).

Most tourists came for leisure purposes.

72% of visits to the city were for leisure, 21% were business trips, 5% were for participation in conferences or training and 2% were for other reasons.

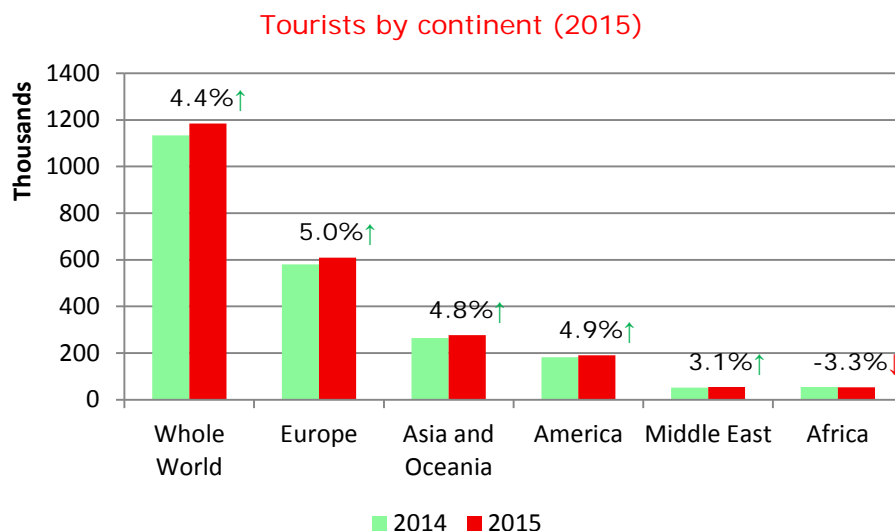
The average room occupancy of accommodation establishments in 2015 was 65% (an increase of 1%) and the average price was 41 euros (an increase of 3%).

Tallinn Airport served a total of 2,166,663 passengers in 2015 (an increase of 7%) and Tallinn's Old City Harbour had a total of 9,770,433 passengers (an increase of 2%).

Estonia and Tallinn as tourism destinations in Europe and globally

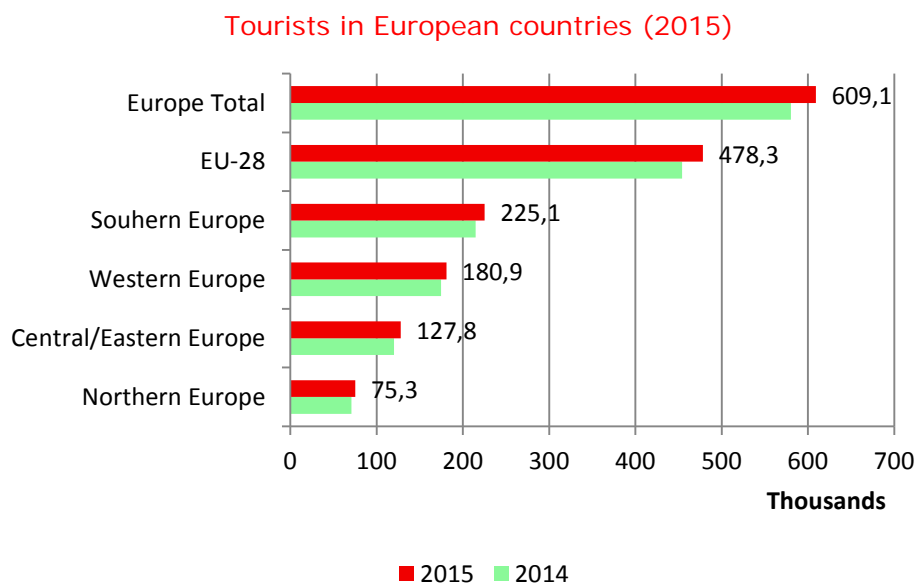
More than 1.2 billion tourists travelled globally in 2015, which is a 4.4% increase compared to 2014.

Of all the destination regions in the world, Europe received more than half, i.e. 609 million visitors (UNWTO, 2016).



Source: World Tourism Barometer (UNWTO, 2015)

The number of tourists increased in the European region by 5% in 2015 year-on-year. The 28 countries in the European Union received 5.3% more tourists in 2015 than in 2014.

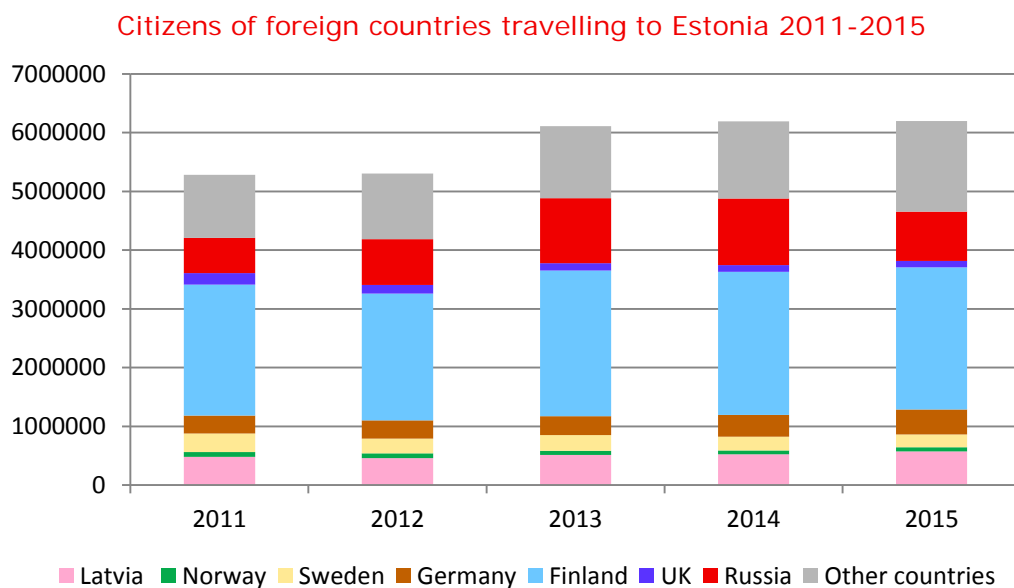


Source: World Tourism Barometer (UNWTO, 2015)

Nights spent in European countries increased by 4.2% in comparison to 2014, with Germany, the USA and the United Kingdom being the main source markets (28% of all nights spent by foreign tourists). The fastest growth among source markets was that of China (an increase of 32%). The bed-nights of British and American tourists also increased (by 8.1% and 7.1%, respectively). The greatest decrease was in the bed-nights of Russian tourists (-31%) (European Cities Marketing Benchmarking Report, preliminary results, 2016).

Visits to Estonia

According to the Bank of Estonia (2015), 6,197,595 foreign visitors visited Estonia in 2015¹ (a change of 0% in comparison with 2014). The number of visitors from the EU increased over the previous year by 2%, accounting for 73% of all visits.



Source: Bank of Estonia (2016)

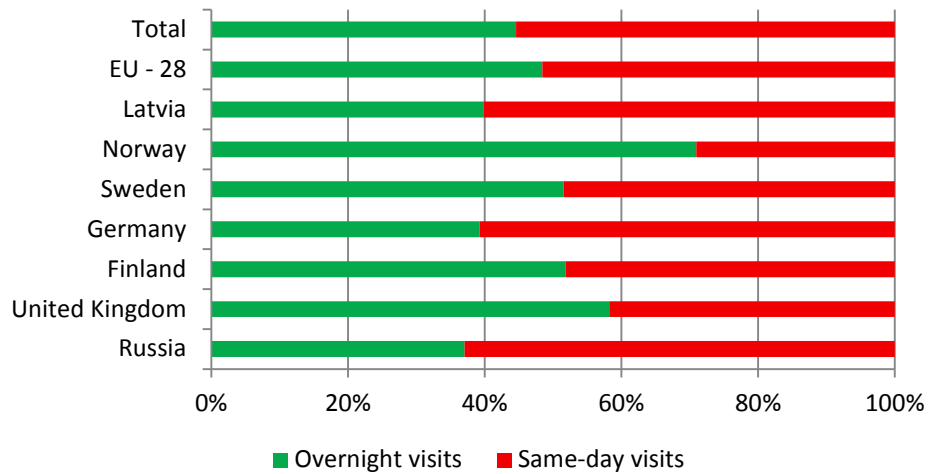
39% of all visits were made by visitors from Finland, although their numbers decreased by 1% compared to 2014. Of other EU countries, the numbers of visitors from Spain (17%), Germany (15%), Italy (11%) and Latvia (10%) showed the highest increases. The number of visitors from Sweden, however, decreased by 7%. Of all visits, 13% came from Russia. The number of Russian visitors fell by 26% year-on-year.

Growth in the number of visitors from Japan, China and South Korea continued in 2015 (18%, 30% and 77%, respectively). The share of Asian tourists in overall numbers was 4%.

Travellers who stayed for several days made up almost half (45%) of the total number of visitors to Estonia.

¹ The tourism statistics of the Bank of Estonia are based on mobile positioning data.

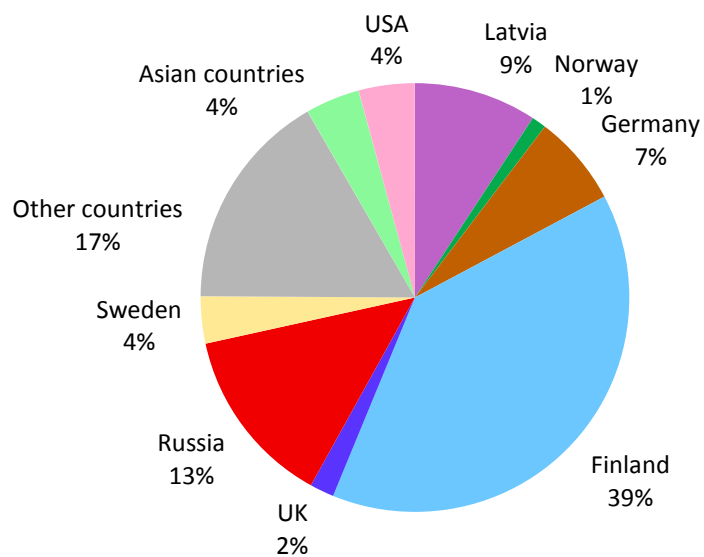
Visits to Estonia by foreign residents 2015



Source: Bank of Estonia (2016)

The average duration of overnights visits was 4.7 days.

Visits to Estonia by foreign residents (2015)



Source: Bank of Estonia (2015)

Visits to Tallinn by foreign residents

According to mobile positioning data, 69% of all foreign visitors to Estonia visited Tallinn (Positium LBS 2016).

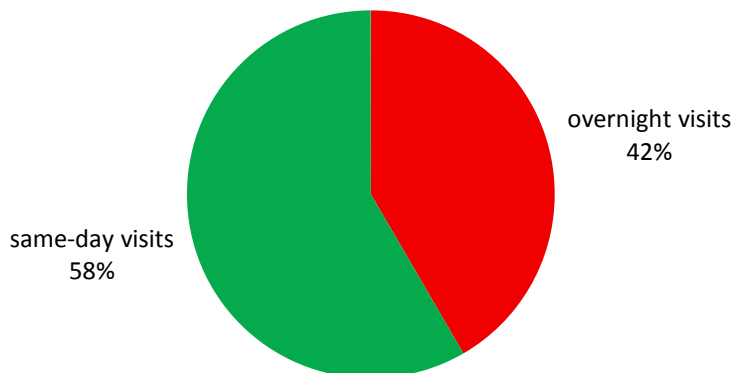
Visits of foreign residents to Tallinn: 4 265 258

Incl.:

Overnight visits 1 775 026

Same-day visits 2 490 232

Visits of foreign residents to Tallinn N=4 265 258



Most of the visits were made from Finland – a total of 1.9 million, accounting for 45% of all visits to Tallinn by foreign residents. 390,000 visits were made by residents of Russia, comprising 9% of all visits, followed by German residents (297,000 or 7%), residents of the USA (223,000 or 5%) and residents of Asian countries (204,000 or 5%).

Visits of foreign residents to Tallinn by country (2015)

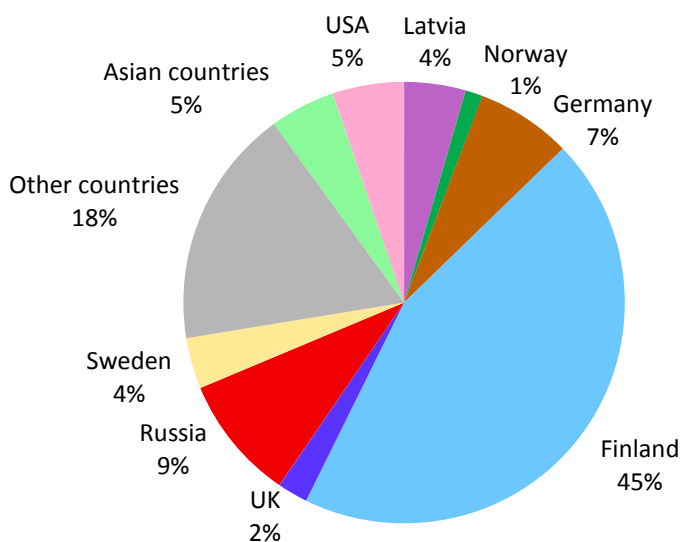
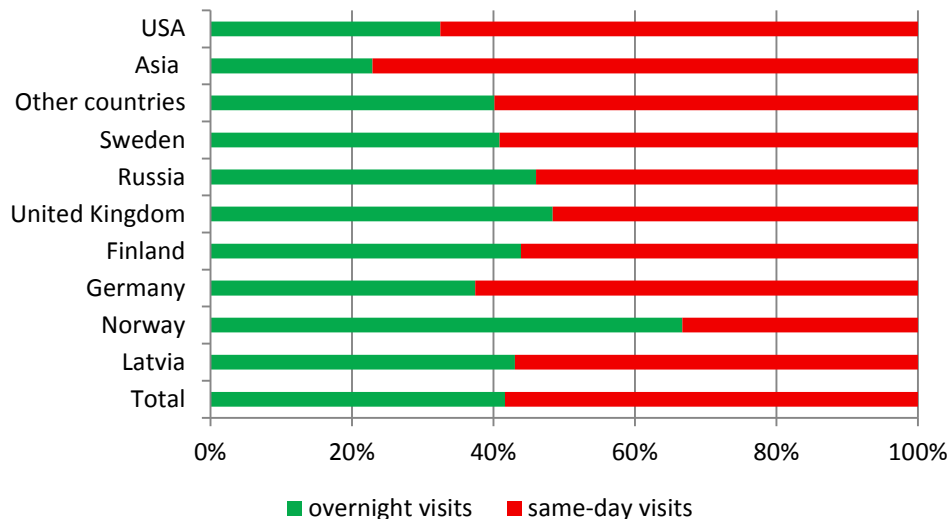


Table 1. Visits of foreign residents to Tallinn 2015

Country	Total number of visits	Overnight visits	Same-day visits	Share of all visits	Average duration of overnight visits	Share of visits to Tallinn of all visits to Estonia
Foreign countries total	4,265,258	1,775,026	2,490,232	100%	3.74	69%
Latvia	191,708	82,537	109,171	4.5%	3.80	33%
Norway	54,631	36,439	18,192	1.3%	3.91	81%
Germany	297,588	111,440	186,148	7.0%	4.44	70%
Finland	1,900,597	834,191	1,066,406	44.6%	3.45	79%
United Kingdom	94,968	45,961	49,007	2.2%	4.09	84%
Russia	389,762	179,332	210,430	9.1%	3.82	47%
Sweden	159,827	65,348	94,479	3.7%	3.45	73%
USA	223,470	72,660	150,810	5.2%	4.52	85%
Asia	203,989	46,710	157,279	4.8%	3.08	80%
incl. China	54,000	10,810	43,190	1.3%	3.09	83%
incl. Japan	83,465	25,589	57,876	2.0%	3.11	90%
incl. South Korea	66,524	10,311	56,213	1.6%	3.00	70%
Other countries	748,718	300,408	448,310	17.6%	3.30	73%

Source: Positium LBS (2016)

Visits to Tallinn by foreign residents 2015



Source: Positium LBS (2016)

Accommodation statistics

Data from Statistics Estonia (2016) show that a total of 3.1 million tourists stayed in accommodation establishments in Estonia in 2015 (1% more than in the previous year), including 1.9 million international tourists (3% fewer than in the previous year) and 1.2 million domestic tourists (7% more than in the previous year).

Over half of the tourists who stayed in accommodation establishments in Estonia spent the night in Tallinn.

A total of 1.6 million tourists stayed in accommodation establishments in Tallinn (1% fewer than the year before), accounting for 51% of all accommodated tourists in Estonia, with 1,381,575 of them being international tourists (2% fewer than the year before) and 197,916 domestic tourists (4% more than the year before).

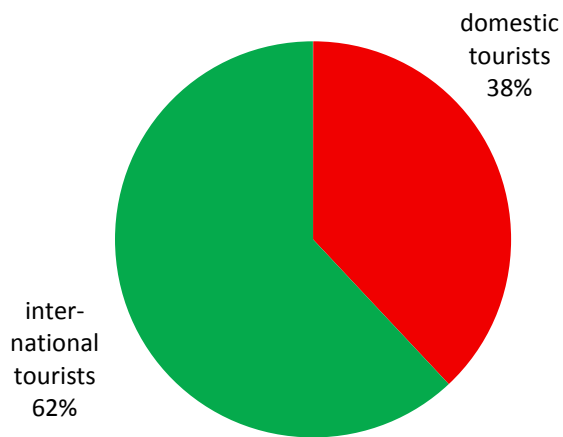
A total of 5.8 million nights were spent in accommodation establishments in Estonia by tourists. The overnight stays of international tourists totalled 2,470,426 (a 3% decrease), while those of domestic tourists amounted to 320,567 (an 8% increase). 2.8 million nights were spent by tourists in accommodation establishments in Tallinn (-2%), representing 48% of all nights spent in Estonia by tourists.

Table 2. Accommodated tourists in Estonia and Tallinn 2015

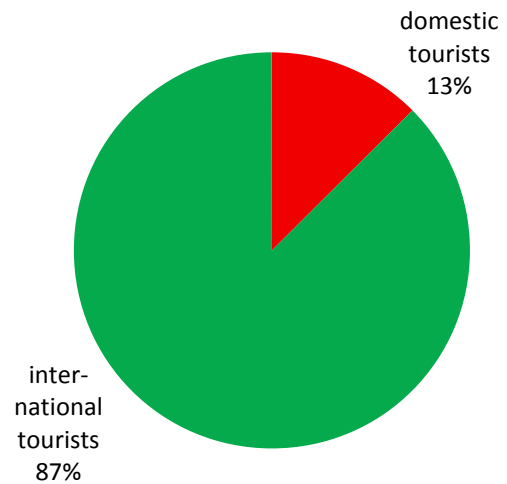
	Accommodated tourists in Estonia		Accommodated tourists in Tallinn		
	Number	Change 2014/2015	Number	Change 2014/2015	Share of persons accommodated in Tallinn of Estonian total
Total	3 112 143	+1%↑	1 579 491	-1%↓	51%
Domestic	1 182 979	+7%↑	197 916	4%↑	17%
International	1 929 164	-3%↓	1 381 575	-2%↓	72%

Source: Statistics Estonia (2016)

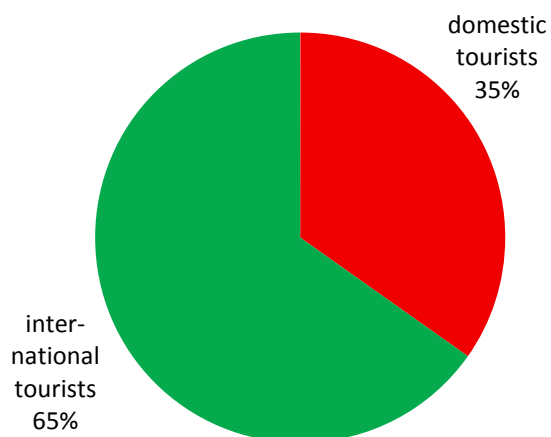
Accommodated tourists, Estonia



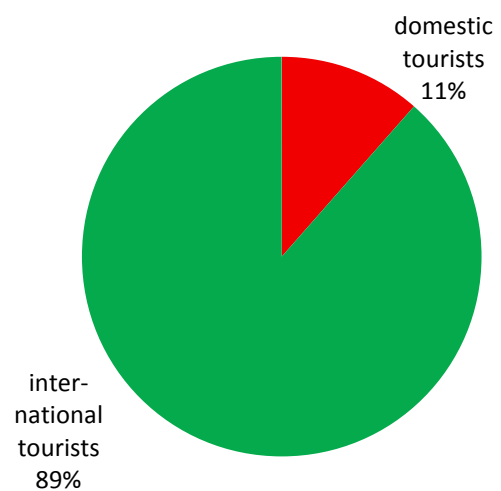
Accommodated tourists, Tallinn



Bed-nights, Estonia



Bed-nights, Tallinn



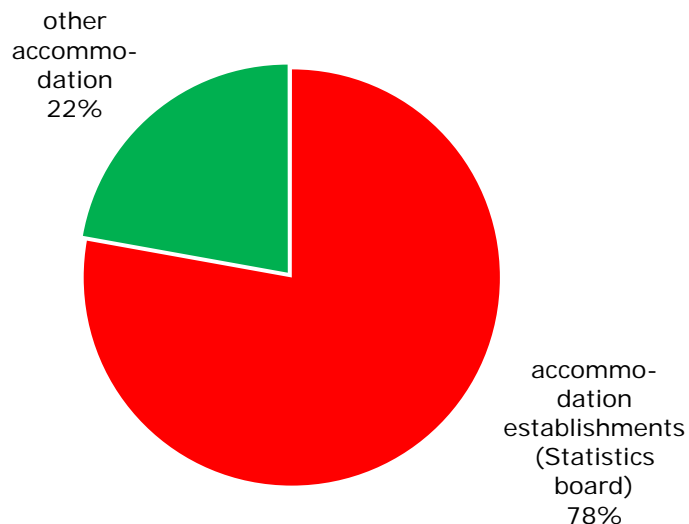
Visits to Tallinn by foreign residents and bed-nights in accommodation establishments in 2015

According to data retrieved from Positium LBS mobile positioning (2016), Tallinn was visited by approximately 4.3 million foreign residents in 2015, of whom almost half (48% or 1.8 million) spent the night in Tallinn.

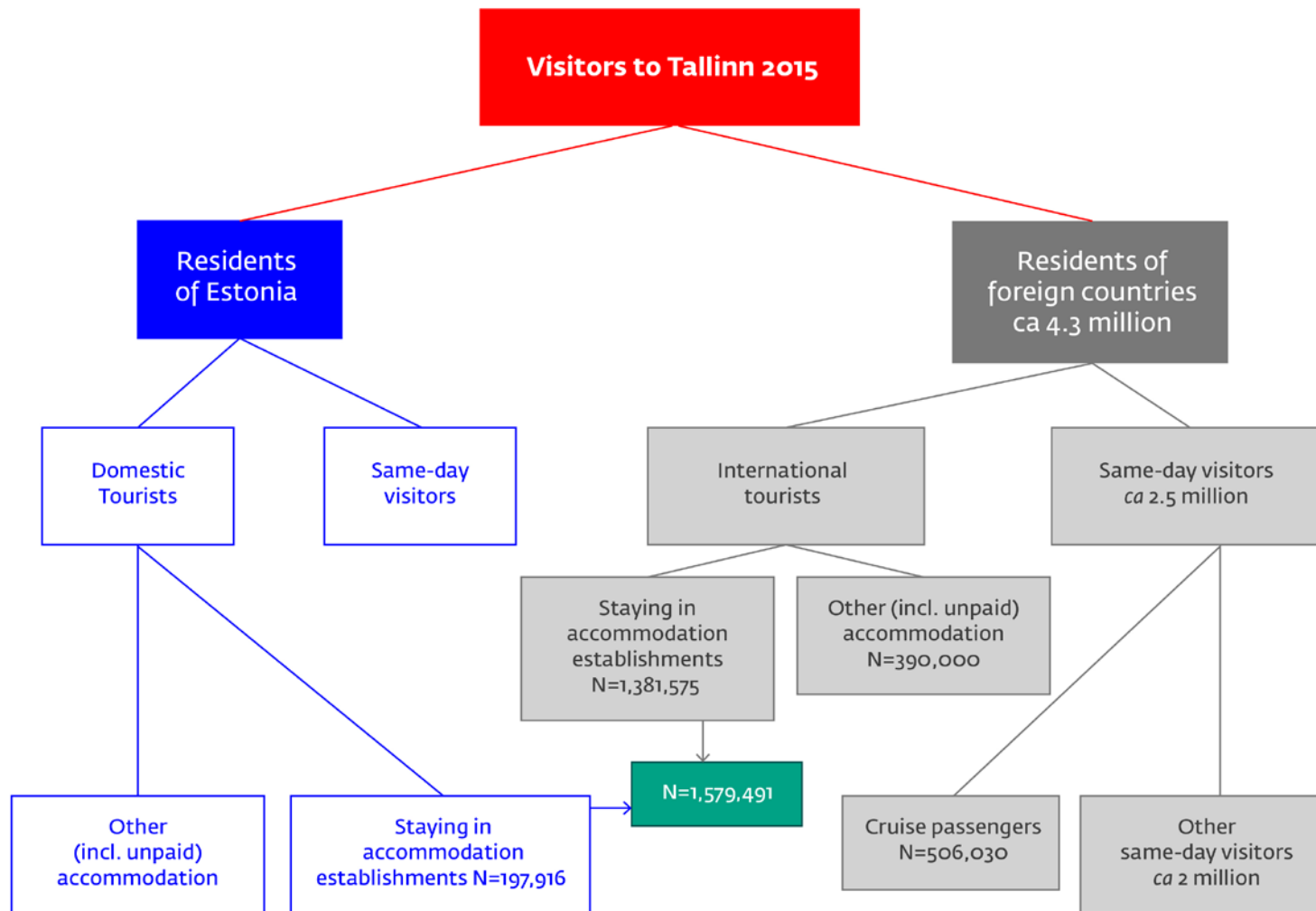
Among same-day visits, 500,622 were by cruise passengers (Port of Tallinn 2016).

According to the data of Statistics Estonia, 1,381,575 tourists stayed in accommodation establishments in 2015 (including establishments with at least five beds). Based on the Positium LBS data on visits by foreign residents to Tallinn, and subtracting the number of tourists who stayed in accommodation establishments, it can be estimated that 393,451 foreign residents used other types of accommodation, which accounts for 22% of all overnight visits of foreign residents to Tallinn. Other accommodation includes staying for free with friends or relatives, holiday apartments and similar accommodation.

Overnight stays	1,775,026
Accommodated tourists (according to Statistics Estonia)	1,381,575
Other accommodation	393,451



Graph 1. Division of visitors to Tallinn in 2015



Tourists accommodated in Tallinn - numbers and countries of origin

According to Statistics Estonia, 1,579,491 tourists stayed in accommodation establishments in Tallinn in 2015 (a 1% decrease compared to previous year).

Domestic tourists accounted for 13% of all visits, while international tourists made up 87% of all tourists who visited Tallinn.

Total accommodated:	1,579,491	-1%↓	-23,713
Incl.:			
international tourists	1,381,575	-2%↓	-30,426
domestic tourists	197,916	+4%↑	+6,713

Accommodated tourists in Tallinn 2011-2015



The main target markets continue to be countries in Europe, which account for 91% of all tourists.

When comparing the number of visits with 2013, the number of foreign tourists has decreased by 1% (-7,476). At the same time, the number of domestic tourists has increased by 15% (+25,290).

Considerably fewer tourists came from Russia in 2015 (-44% or -90,632) than in 2013. Conversely, the number of tourists from Asia increased in both intervening years, with growth of 75% or 24,846 more tourists compared to 2013. In both 2014 and 2015 the number of tourists from the UK increased (8% or 3,123 tourists more than in 2013), as did the number of tourists from Germany (16% or 11,473 tourists more than in 2013).

Table 3. Tourists accommodated in Tallinn by continent

Region of origin	Number	Change 2014/2015		Share of all international tourists
		%	Number	
Europe	1,445,126	-4.1%↓	-61,055	91.5%
America	50,721	33.6%↑	+12,770	3.2%
Asia	57,799	28.7%↑	+12,900	3.7%
Africa	1,784	6.4%↑	+107	0.1%
Oceania	6,178	-19.7%↓	-1,514	0.4%
Unspecified	17,883	272.3%↑	13,079	1.1%
Foreign countries total	1,579,491	-1.5%↑	-23,713	100%

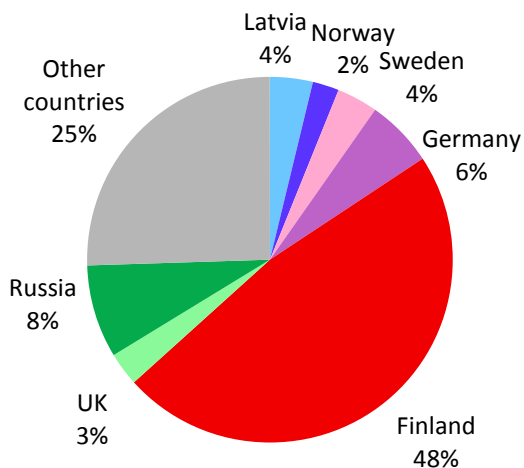
Source: TourMis (2016)

The share of visitors from Finland was the largest (48% of all foreign tourists).

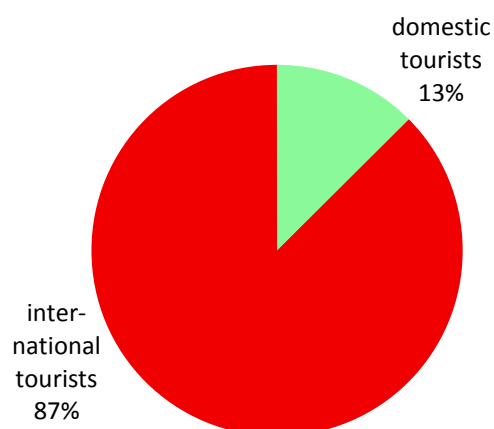
Table 4. Main foreign markets of Tallinn in 2015

Country	International tourists accommodated in 2015			Share of all international tourists
	Number	Change 2014/2015		
		%	Number	
Finland	657,991	-1%↓	-6,054	48%
Russia	113,600	-36%↓	-63,454	8%
Germany	82,254	3%↑	2,605	6%
Latvia	52,253	21%↑	8,898	4%
Sweden	50,132	0%	235	4%
UK	40,704	4%↑	1,490	3%
Norway	32,224	6%↑	1,744	2%
Other countries	352,417	7%↑	24,110	26%
Foreign countries total	1,381,575	-2%↓	-30,426	100%

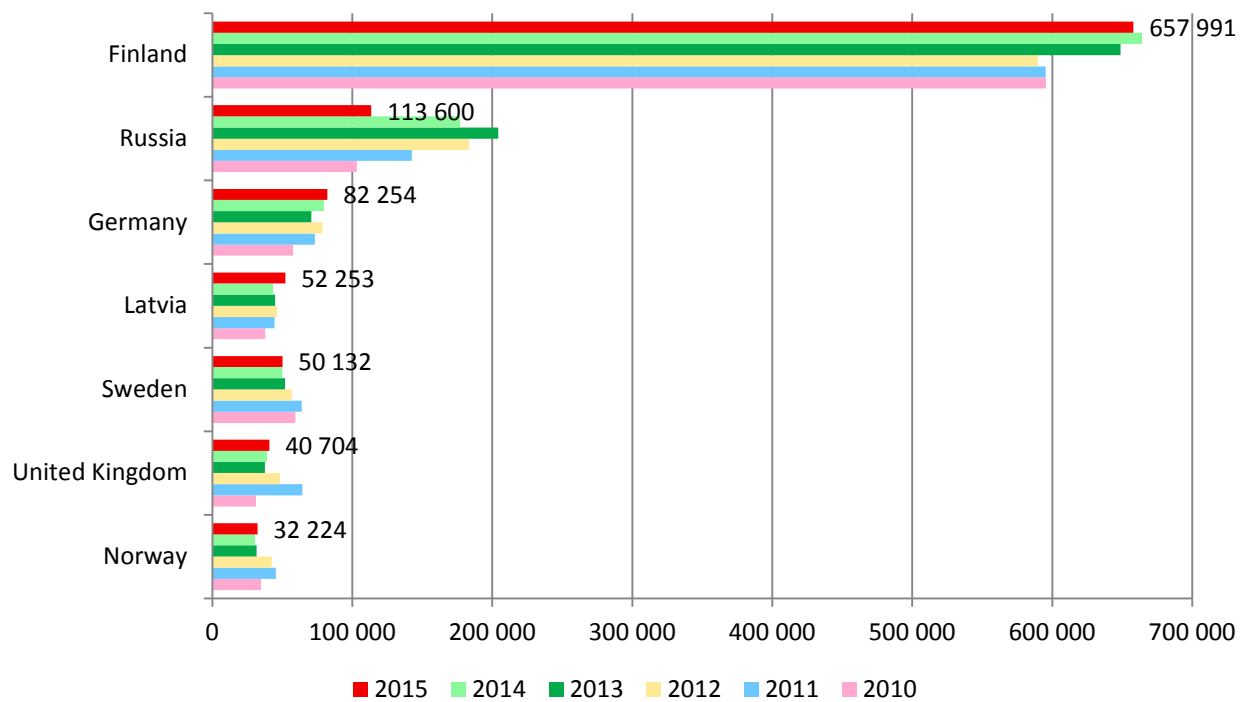
Share of international tourists by country (2015)



Distribution of tourists (2015)



International tourists from main target markets in Tallinn by country (2015)

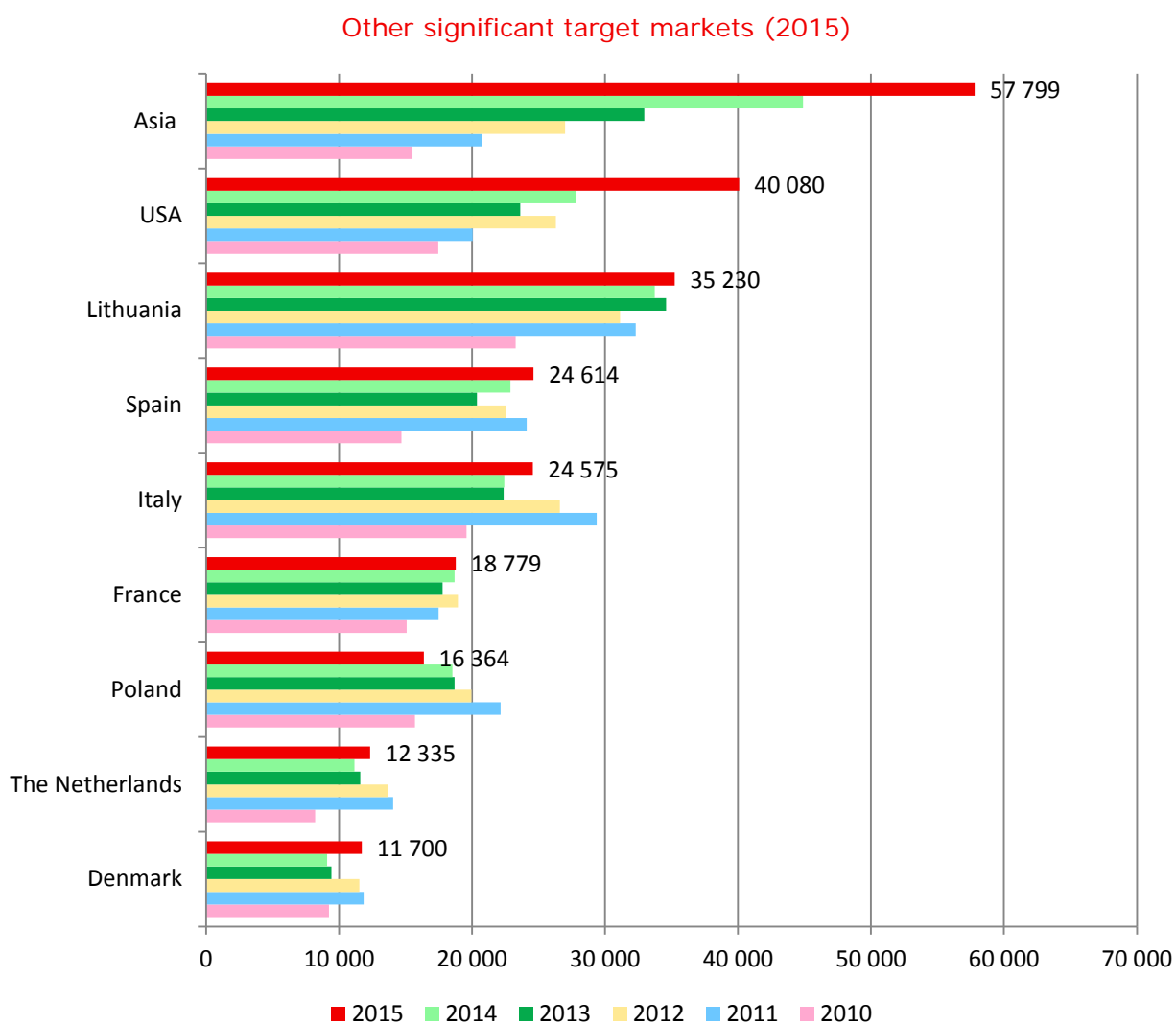


The number of tourists from more distant countries has grown.

Table 5. Changes in other foreign markets (2015)

Country	International tourists accommodated (2015)			Share of all international tourists
	Number	Change 2014/2015		
		%	Number	
Asia	57,799	+29% ↑	12,900	4.18%
incl. China	10,448	0%	19	0.76%
incl. Japan	21,869	34% ↑	5,500	1.58%
incl. South Korea	10,181	58% ↑	3,748	0.74%
USA	40,080	44% ↑	12,282	2.90%
Lithuania	35,230	4% ↑	1,495	2.55%
Spain	24,614	8% ↑	1,728	1.78%
Italy	24,575	10% ↑	2,154	1.78%
France	18,779	0%	88	1.36%
Poland	16,364	-12% ↓	-2,157	1.18%
The Netherlands	12,335	10% ↑	1,170	0.89%
Denmark	11,700	29% ↑	2,600	0.85%
Ukraine	10,554	7% ↑	679	0.76%
Switzerland	9,162	26% ↑	1,905	0.66%
Countries in Central and South America	6,917	15% ↑	878	0.50%

Tourists from other destination countries:



Overnight stays of tourists accommodated in Tallinn

The number of overnight stays of tourists accommodated in Tallinn decreased by 2% in 2015.

Overnight stays by international tourists decreased by 3%, while those by domestic tourists increased by 1%.

Overnight stays total:	2,790,993	-2%↓	-64,055 nights
Incl.:			
by international tourists	2,470,426	-3%↓	-67,414 nights
by domestic tourists	320,567	+1%↑	+3,359 nights

Of the main target markets for overnight stays, Latvia (+19%), the UK (+4%) and Norway (+2%) grew, while Russia (-38%), Sweden (-3%) and Germany (-2%) decreased.

There was also growth on other markets, especially in the numbers of overnight stays by tourists from the USA (+56%) and Asia (+21%).

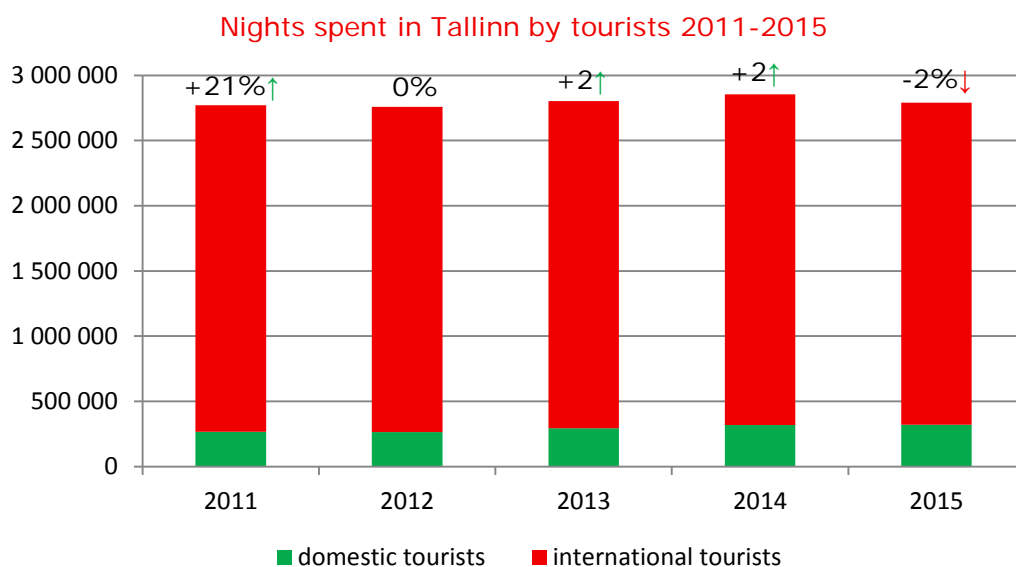


Table 6. Overnight stays from main foreign markets of Tallinn, 2015

Country of origin	Overnight stays by accommodated international tourists, 2014			Share of all overnight stays by international tourists
	Number	Change 2013/2014		
		%	Number	
Finland	986,830	0%	-2,806	40%
Russia	224,583	-38%↓	-138,383	9%
Germany	177,792	-2%↓	-3,603	7%
UK	90,978	4%↑	3,272	4%
Latvia	83,056	19%↑	13,477	3%
Sweden	80,889	-3%↓	-2,116	3%
Norway	72,521	2%↑	1,431	3%
Other countries	753,777	9%↑	61,314	31%
Foreign countries total	2,470,426	-3%↓	-67,414	100%

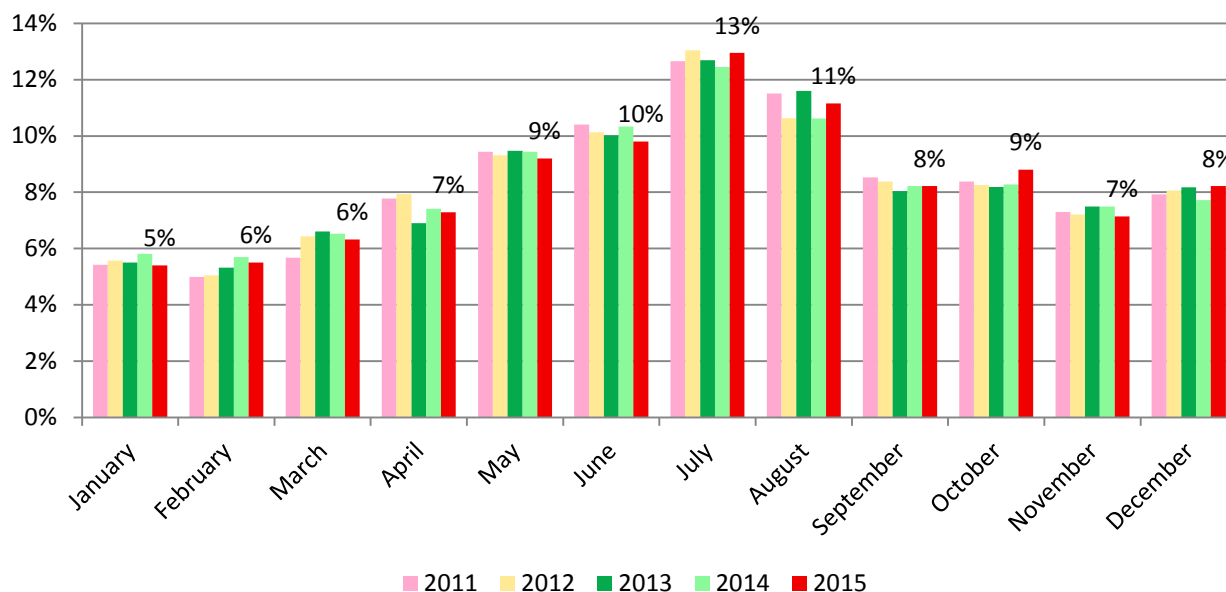
Table 7. Changes in other foreign markets in 2015

Country of origin	Overnight stays by accommodated international tourists (2015)			Share of all overnight stays by international tourists
	Number	Change 2014/2015		
		%	Number	
USA	100,829	56%↑	36,109	4.08%
Asia	91,636	21%↑	16,108	3.71%
incl. China	17,524	4%↑	596	0.71%
incl. Japan	34,357	22%↑	6,310	1.39%
incl. South Korea	12,089	28%↑	2,645	0.49%
Spain	74,197	34%↑	18,955	3.00%
Lithuania	59,005	-3%↓	-1,822	2.39%
Italy	57,425	8%↑	4,242	2.32%
France	44,109	1%↑	342	1.79%
Poland	32,371	-11%↓	-4,084	1.31%
The Netherlands	27,337	9%↑	2,178	1.11%
Ukraine	23,197	18%↑	3,577	0.94%
Denmark	22,489	18%↑	3,464	0.91%
Switzerland	18,505	22%↑	3,296	0.75%
Turkey	13,791	9%↑	1,152	0.56%
Countries in Central and South America	13,661	5%↑	628	0.55%

Distribution of accommodated tourists by month

Visits by residents of foreign countries to Tallinn are divided unevenly across the year. The Gini coefficient of visitors to Tallinn in 2015 was 0.158² (0.143 in 2014).

Distribution of visitors to Tallinn by month (GINI=0.158)



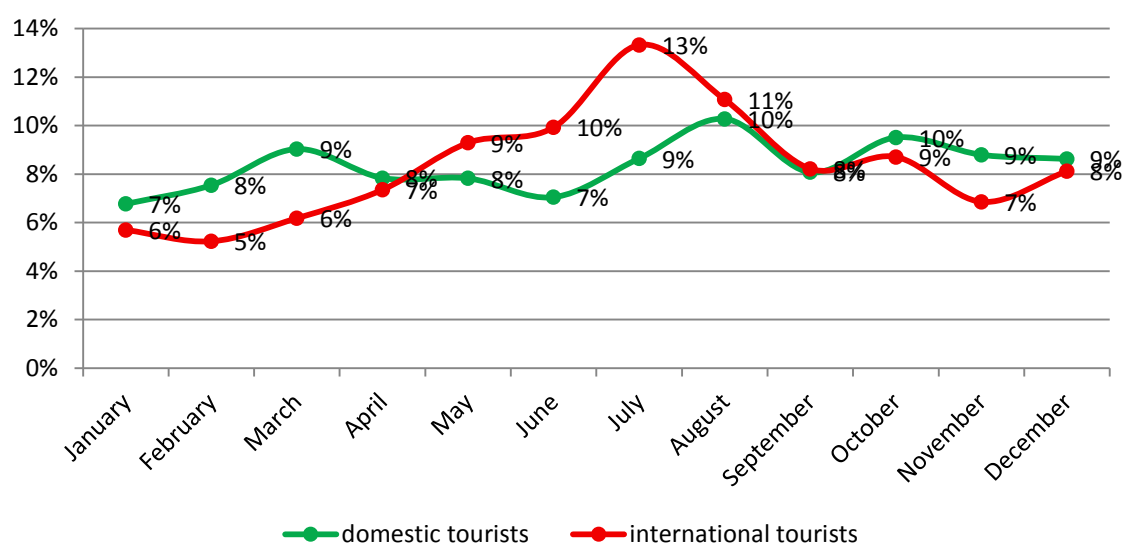
More than a third (34%) of all visitors in 2015 were served in accommodation establishments during the three summer months. More than half (51%) of all visits to Tallinn were made between May and September. A large proportion (67%) of visitors to the capital who used the services of accommodation establishments visited Tallinn between April and October.

The distribution of visits by international tourists and domestic tourists varies throughout the year.

A larger share of international tourists (44%) visited Tallinn between May and August. The most popular month among international tourists was July, accounting for 14% of all international visits in 2015. Visits by domestic tourists peaked in August (10% of all visits to Tallinn by domestic tourists) and in the second half of the year (with the period from August to December seeing 45% of all visits by domestic tourists to Tallinn during the year).

² The Gini coefficient is an indicator of the inequality of distribution. In tourism, the coefficient is used to indicate the inequality of distribution of tourists (or overnight stays) across the year. If the coefficient is 1, this means that tourists visit in only one month of the year. If the coefficient is 0, the number of tourists visiting each month is equal throughout the year.

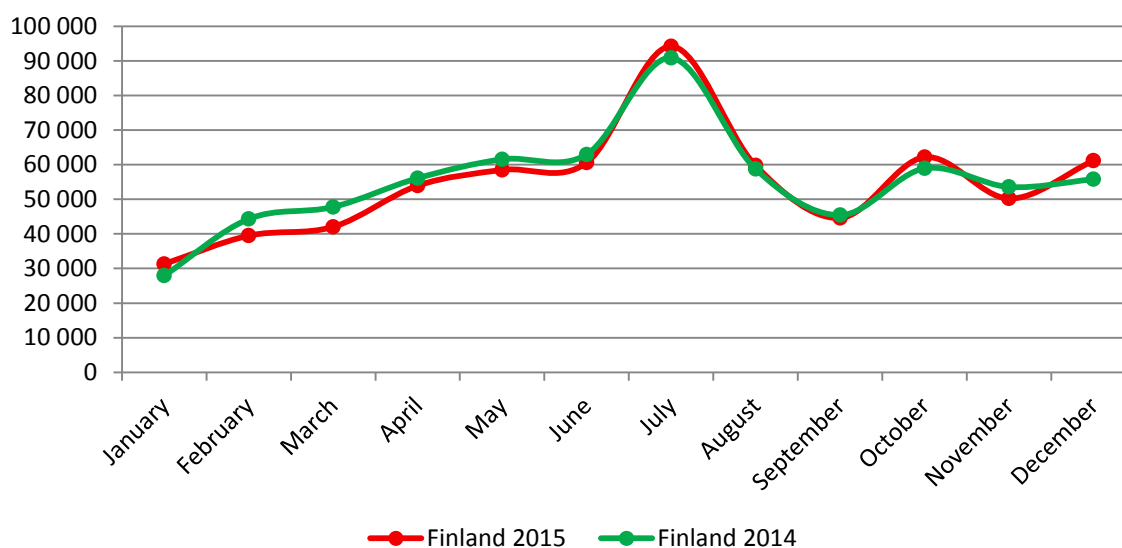
Distribution of nights by international and domestic tourists by month (2015)



Seasonality can also be seen across target markets.

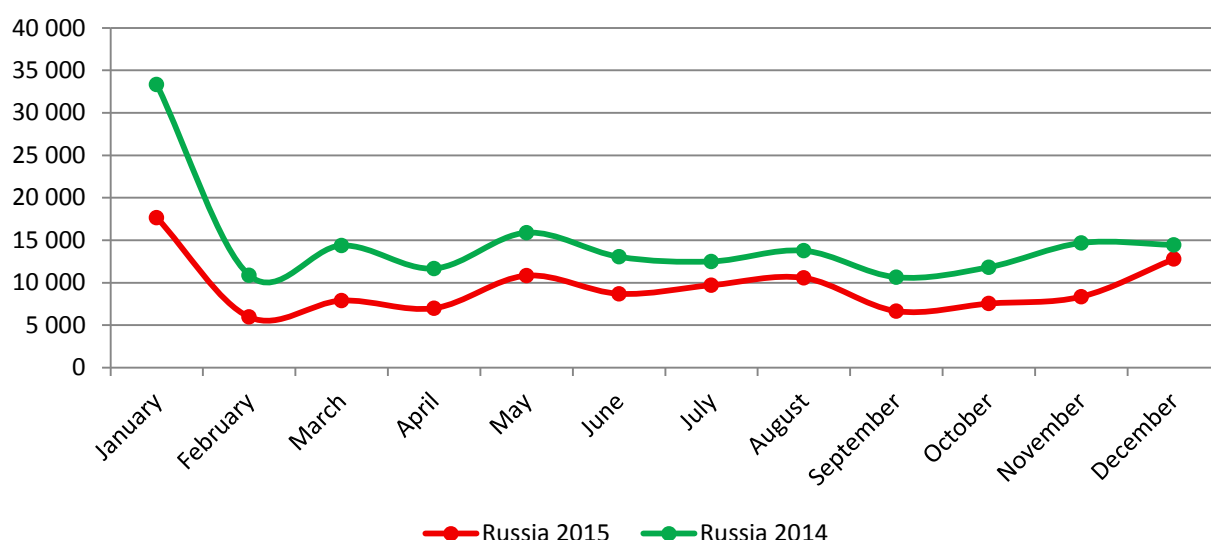
Finnish tourists tend to visit Tallinn in the summer months (Gini 2014=0.143, Gini 2015=0.158).

Visits of Finnish tourists to Tallinn by month



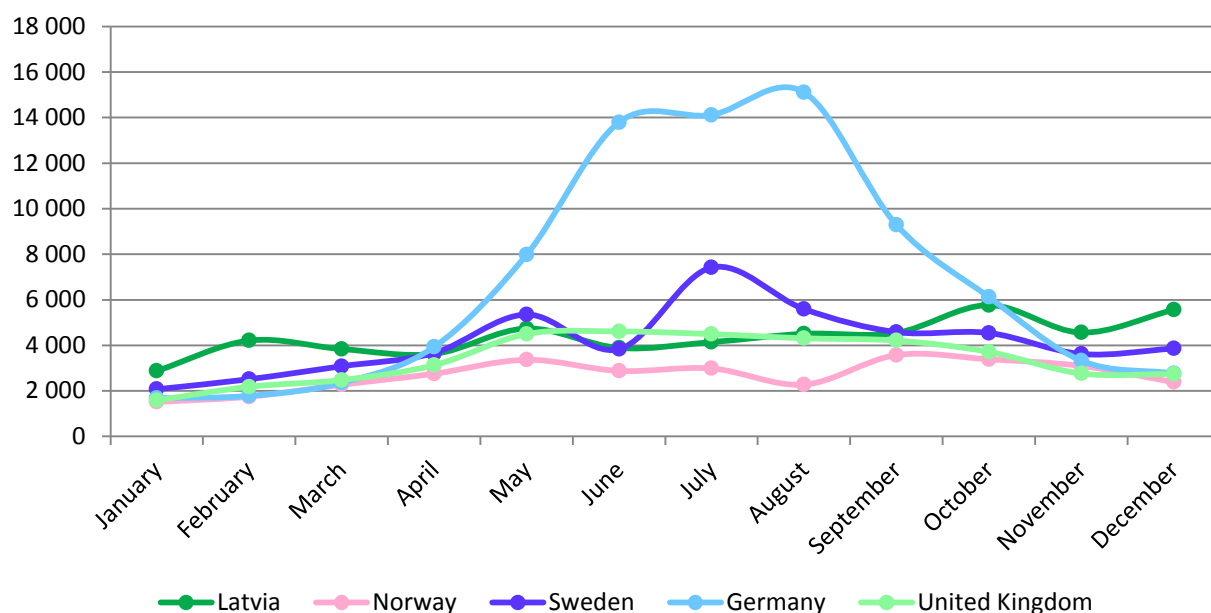
Tourists from Russia have traditionally come to Tallinn at the end and beginning of the year. The number of visits by tourists from Russia fell significantly in 2015 compared to the previous year, although the seasonal distribution remained the same (Gini 2014=0.190, Gini 2015=0.185)

Visits of Russian tourists to Tallinn by month

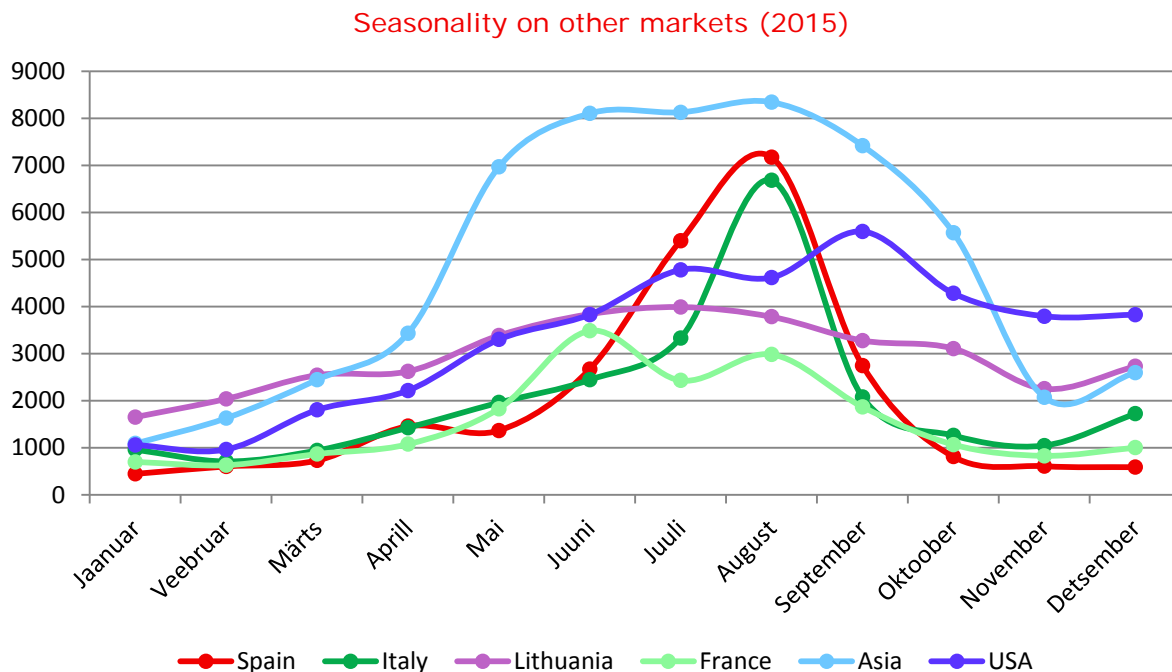


Visits by citizens of Latvia (Gini=0.105), Norway (Gini=0.144), Sweden (Gini=0.199) and the UK (Gini=0.181) are distributed over the year more evenly. Visits by Germans (Gini=0.428) show stronger seasonality.

Seasonality on other main markets (2015)



Among visitors from other countries there is less seasonality in the visits by Lithuanians (Gini=0.153) and stronger seasonality among visitors from Spain (Gini=0.537), Italy (Gini=0.389), France (Gini=0.342), the USA (Gini=0.263) and Asia (Gini=0.347).



Purposes of travel of visitors to Tallinn

Tourists staying in accommodation establishments in Tallinn

The following is an overview of the purposes of visiting Tallinn of visitors who have stayed in accommodation establishments in Tallinn. Statistics Estonia divides tourists into three categories according to the purpose of their trip: holiday; business; and other purposes. Business trips are in turn divided into conference tourism and business tourism³.

Holiday tourists dominated among guests at accommodation establishments in Tallinn in 2015 (72%), although numbers decreased by 4% compared to 2014.

-
- ³ **Holiday trip** – a trip with the purpose of recreation: spending one's annual vacation or a weekend, visiting relatives or friends or spending free time in other ways. Holiday trips that are paid for by the employer and bonus trips also qualify as holiday trips.
 - **Conference tourists** are guests of accommodation establishments who name participating in a conference, a training seminar or a meeting as the purpose of their trip.
 - **Business tourists** are guests of accommodation establishments who come to Tallinn to meet business partners, participate in meetings, fairs, product shows, etc.
 - **Other trip** – a trip that does not qualify as a holiday or a business trip (e.g. transit tourism or medical tourism)

Business-related trips accounted for 26% of all visits: 21% (337,102) of all visitors to Tallinn came here for business meetings and 5% (80,303) for conferences or training. The share of tourists who travelled for other purposes made up 2% (32,222) of all tourists.

Holiday travellers mostly visited Tallinn in the summer months: 36% of holiday trips took place during June, July and August. Most business trips were made in May (10% of all business trips made during the year), July (11%) and August (10%). The high season for conference trips was the second half of the year: 46% of all trips for conference or training purposes were made from September to December, with most of them occurring in October and December (12% of all trips for conference and training purposes during the year in both months).

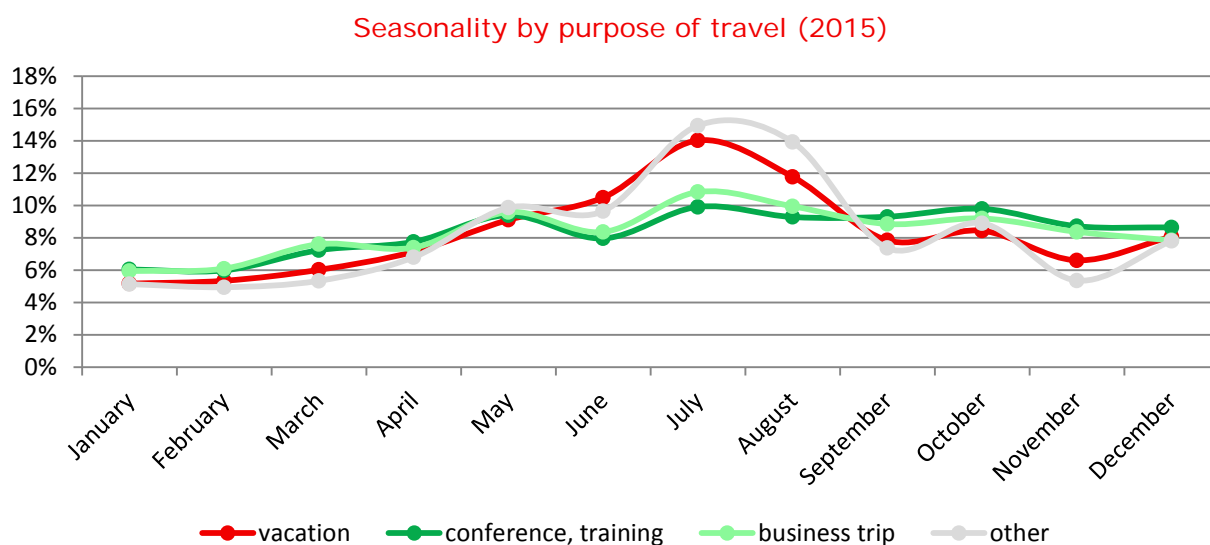


Table 8. Domestic and international tourists in accommodation establishments in Tallinn by purpose of travel (2015)

Purpose of travel	Domestic and international tourists accommodated (2015)			
	Share	Number	Change 2014/2015	
			%	Number
Total	100%	1,579,491	-1%↓	-23,713
Holiday	72%	1,129,864	-4%↓	-46,976
Conference, training	5%	80,303	+32%↑	+19,255
Business trip	21%	337,102	+1%↑	+4,105
Other trip	2%	32,222	0%	-97

All tourists by purpose of travel (2015)

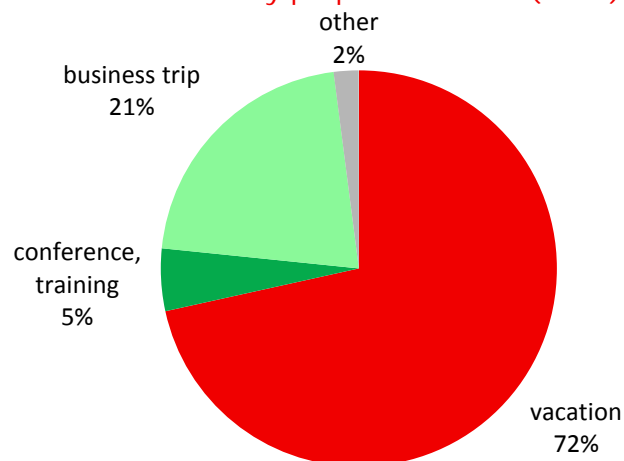


Table 9. International tourists in accommodation establishments in Tallinn by purpose of travel (2015)

Purpose of travel	International tourists accommodated (2015)			
	Share	Number	Change 2014/2015	
			%	Number
Total	100%	1,381,575	-2%↓	-30,426
Holiday	73%	1,004,780	-4%↓	-43,710
Conference, training	5%	71,293	33%↑	+17,684
Business trip	20%	278,612	-1%↓	-4,070
Other trip	2%	26,890	-1%↓	-330

International tourists by purpose of travel (2015)

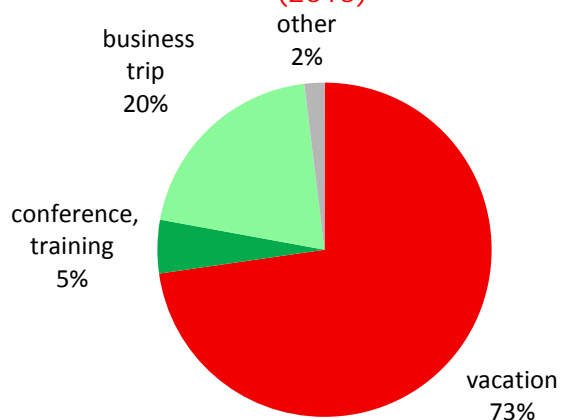
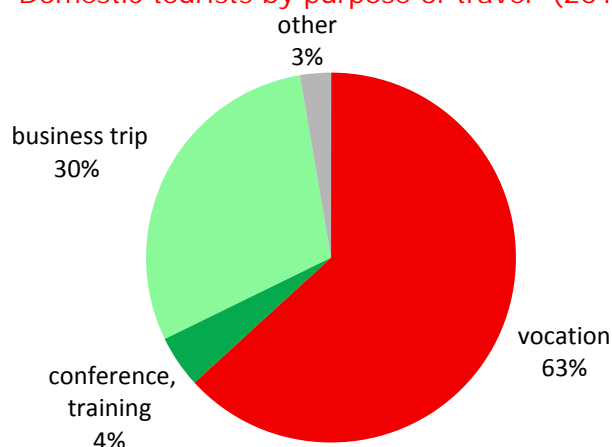


Table 10. Domestic tourists in accommodation establishments in Tallinn by purpose of travel (2015)

Purpose of travel	Domestic tourists accommodated (2015)			
	Share	Number	Change 2014/2015	
			%	Number
Total	100%	197,916	4%↑	+6,713
Holiday	63%	125,084	-3%↓	-3,266
Conference, training	4%	9,010	21%↑	+1,571
Business trip	30%	58,490	16%↑	+8,175
Other trip	3%	5,332	5%↑	+233

Domestic tourists by purpose of travel (2015)



Length of trip

The average length of a trip in 2015 was **1.77 nights**, which is 1% less than the previous year.

Domestic tourists spent an average of 1.62 nights, which is 2% shorter compared to 2014.

International tourists spent an average of 1.79 nights, which is 1% shorter compared to 2014.

The longest stays were by passengers

from

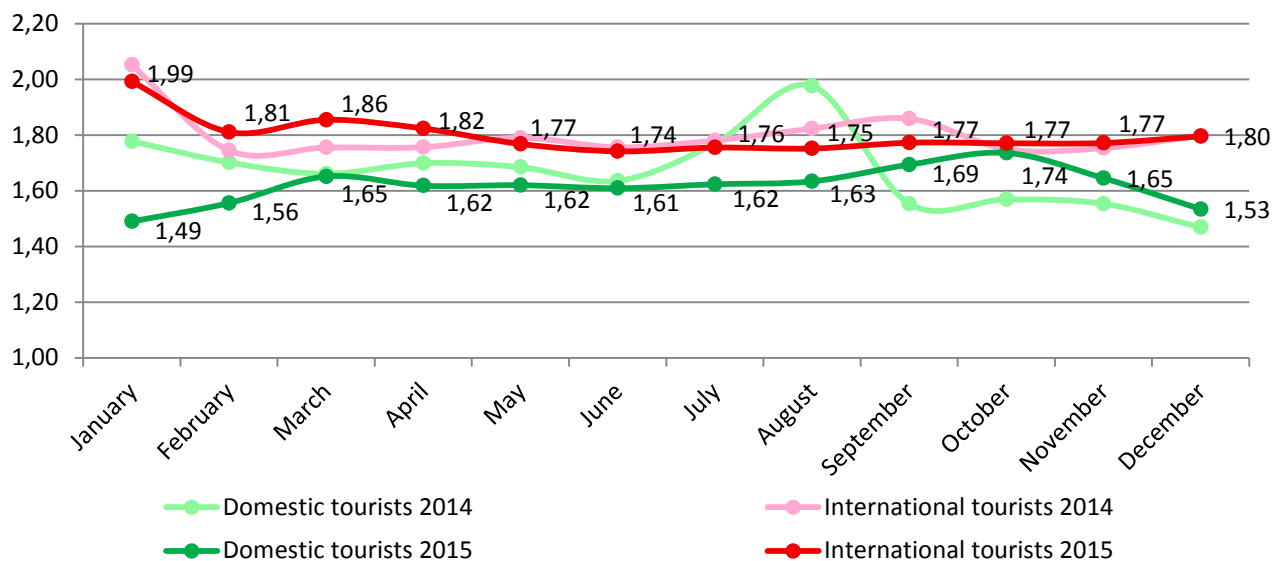
Slovakia	3.30 nights	-2%↓
Romania	3.17 nights	+4%↑
Spain	3.01 nights	+24%↑

The shortest stays were by passengers

from

Finland	1.50 nights	+1%↑
Asia	1.59 nights	-6%↓
Latvia	1.59 nights	-1%↓

Average length of stay of tourists (nights) 2014-2015



The length of stay differed according to the purpose of travel.

Table 11. Length of trip by purpose of travel 2015

	Domestic tourists	International tourists	Total
Vacation	1.44	1.72	1.69
Business trips	1.82	1.88	1.87
incl. conference, training	1.81	1.93	1.91
incl. other business trip	1.83	1.86	1.86
Other	3.32	3.28	3.28
Total	1.62	1.79	1.77

Business and conference tourism

In 2015, more than half (60%) of all business travellers who stayed in accommodation establishments in Estonia did so in Tallinn.

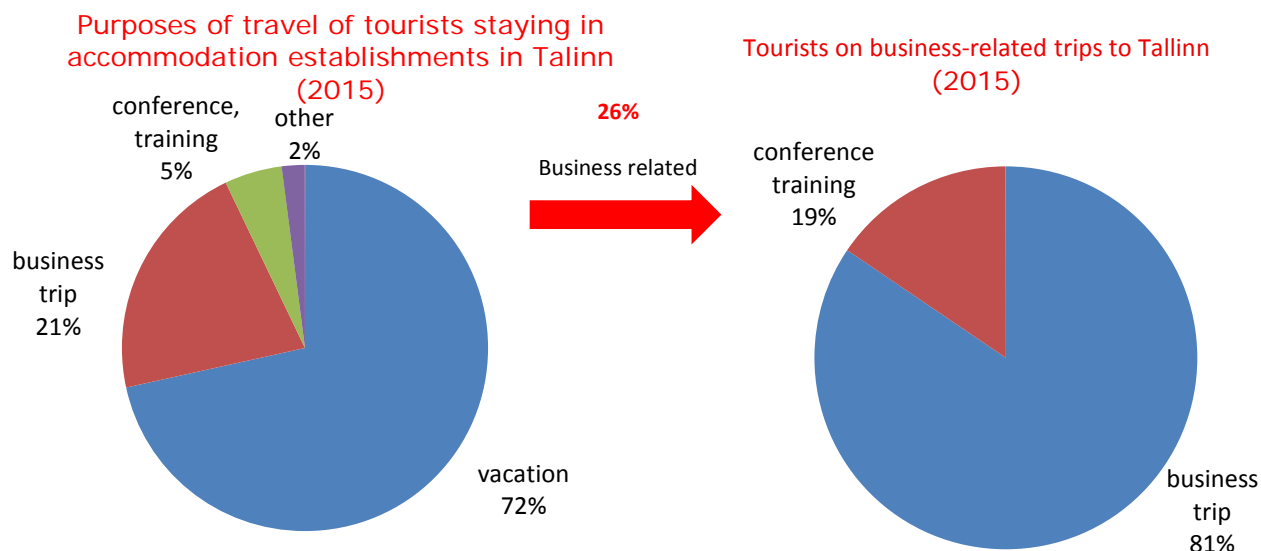
Of all the visitors who stayed in accommodation establishments in Estonia, 698,261 (22%) were on business trips, of whom 417,405 (60%) stayed in accommodation establishments in Tallinn. The proportion of business travellers who stay in Tallinn of all those who come to Estonia rose in 2015.

Table 12. Business travellers who stayed in accommodation establishments in Estonia and share of those who stayed in Tallinn

	2010	2011	2012	2013	2014	2015
Business trips to Estonia	546 538	644 353	665 528	689 222	676 983	698 261
Business trips to Tallinn	312 990	369 096	378 000	383 153	394 045	417 405
Share of those who stayed in Tallinn	57%	57%	57%	56%	58%	60%

Source: Statistics Estonia (2016)

Of the business-related trips of tourists who stayed in accommodation establishments in Tallinn, 81% were business trips and 19% were conference trips. The share of all business-related trips to Tallinn increased by 6% year-on-year. Of all work-related trips, business trips have increased by 1% and the market share of conference trips by 32%.

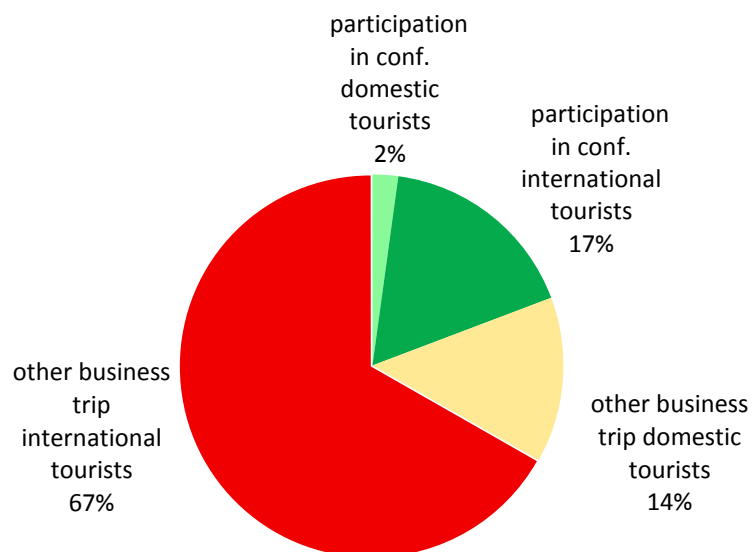


In terms of **business-related travellers accommodated, 84% came from foreign countries and 16% were local**. Compared to 2014, the number of domestic business tourists increased by 17% (9,746) and the number of international business tourists increased by 4% (13,614).

Among accommodated **conference tourists, 89% (71,293) were international and 11% (9,010) were domestic**.

The majority (67%) of business-related trips were taken by international business tourists. Business trips by Estonians accounted for 14% of all business-related trips, conference trips by international tourists for 17% and conference trips/participation in seminars by Estonians for 2%.

Tourists on business-related trips in
accommodation establishments in Tallinn (2015)

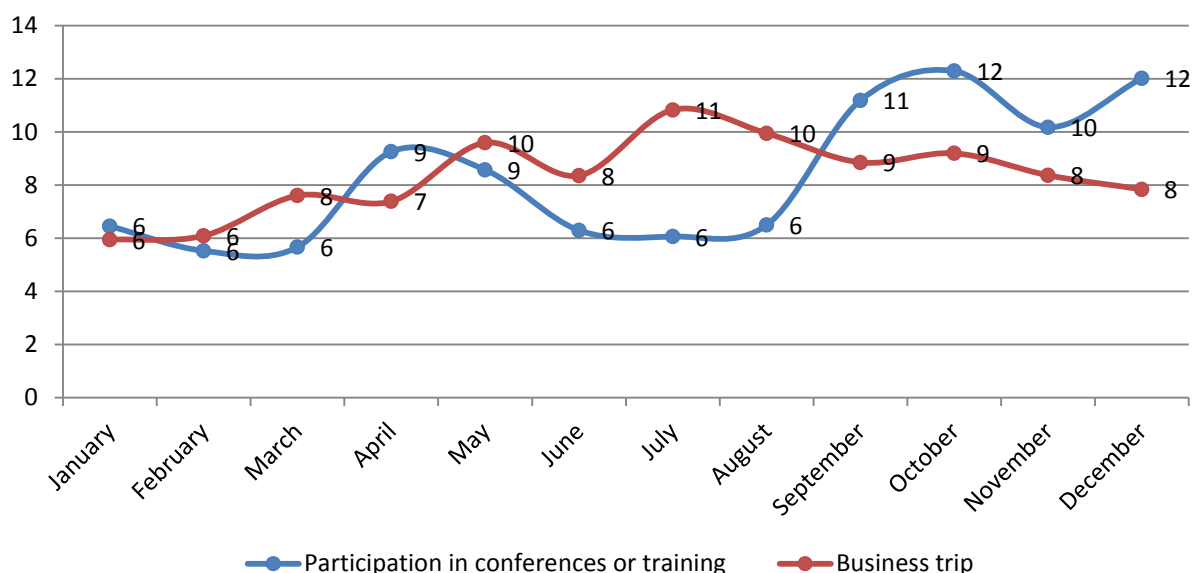


The number of accommodated conference tourists grew by 32% compared to 2014, and the number of business tourists grew by 1%. The number of foreign conference tourists grew by 33% (17,684), while the number of local conference tourists grew by 21% (1,571). The number of foreign conference tourists accommodated decreased by 1% (4,070), while the number of Estonian business travellers who stayed in accommodation establishments increased by 16% (8,175).

The length of business trips in 2015 increased by 1% compared to the previous year. The average length of a business trip was 1.87 nights, incl. 1.91 nights for conference trips and 1.86 nights for business trips. By way of comparison, the average stay of holiday tourists in accommodation establishments in Tallinn was 1.69 nights.

The number of conference tourists accommodated was highest in October (9,870) and above the average for the year in **September, November and December**. From other countries, the number of tourists who came for conferences was highest in October (8,974) and December (8,593), while the number for domestic tourists was highest in September (1,017) and December (1,061).

Seasonality of business-related trips (2015)



Accommodation establishments in Tallinn

As the registration obligation of accommodation establishments in the Register of Economic Activities ended on 1 July 2014 there is no exact data on the total number of providers who offered accommodation services in 2014 and 2015.

In its sample, Statistics Estonia includes establishments which offer more than five beds.

Table 13. Accommodation establishments, rooms and beds in 2014 and 2015

	Number of establishments		Rooms/cabins		Beds	
	2014	2015	2014	2015	2014	2015
January	123	113	7,075	7,003	14,651	15,228
February	124	114	7,067	6,891	14,608	14,313
March	116	116	6,893	6,935	14,260	14,419
April	117	117	6,900	6,931	14,296	14,422
May	121	123	6,969	6,986	14,424	14,541
June	123	124	7,050	7,048	14,424	14,683
July	122	126	7,038	7,030	15,303	14,674
August	123	125	7,055	7,006	15,310	14,669
September	119	123	7,090	6,949	15,409	14,463
October	115	119	7,058	6,930	15,274	14,347
November	113	114	7,023	6,830	15,214	14,169
December	114	116	7,028	6,904	15,275	14,361

Source: Statistics Estonia (2016)

Based on the information published in the Internet portal booking.com, there were 426 accommodation providers in Tallinn, including guest apartments (312), hotels (63), hostels (28), guesthouses (11), home accommodation (5), holiday homes (3), B&Bs (1) and camping areas (1) (as at 15 March 2016).

In the Airbnb database there are 735 providers of accommodation in Tallinn, including private accommodation (607), private rooms (109) and shared rooms (19) (as at 4 April 2015).

The number of providers of accommodation services tends to vary seasonally.

Table 14: Accommodation establishments in Tallinn (2010-2013)

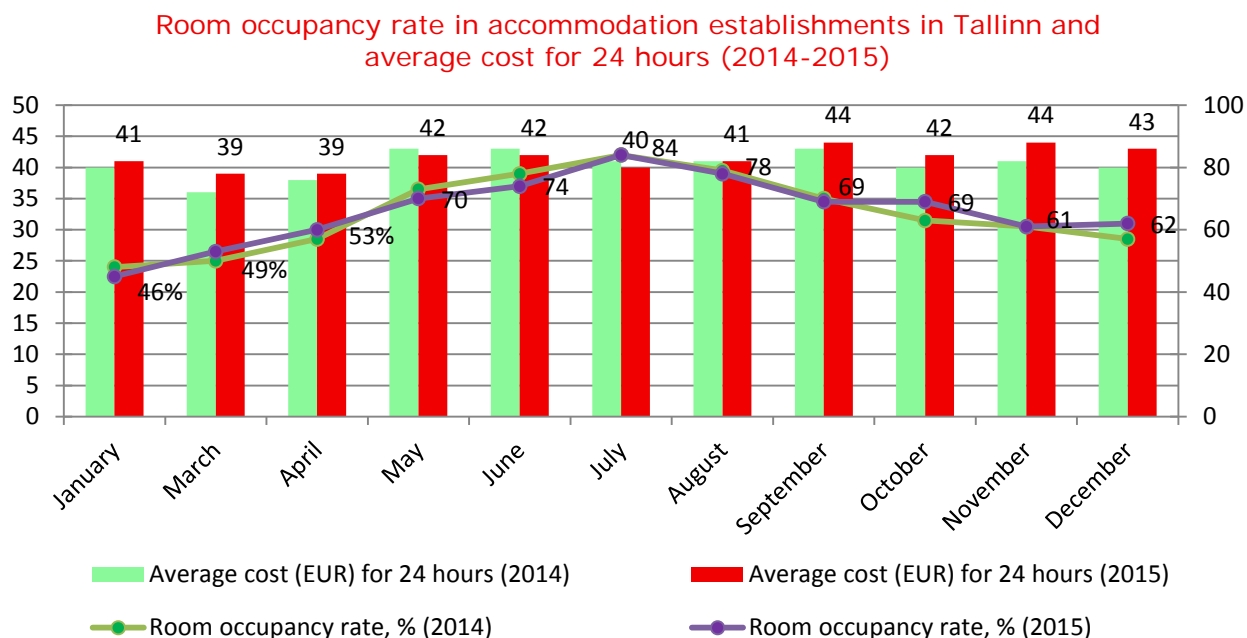
	2010	2011	2012	2013
Accommodation establishments	363	358	353	324
incl. hotels	58	58	57	55
Rooms	7,607	7,577	7,561	7,334
Beds	15,378	15,377	15,040	14,914
Room occupancy %	52	62	61	62
Bed occupancy %	44	53	52	52
Average cost per night, €	31	33	37	39

Source: Tourism Department of Tallinn City Enterprise Board, Statistics Estonia

Occupancy of rooms in accommodation establishments

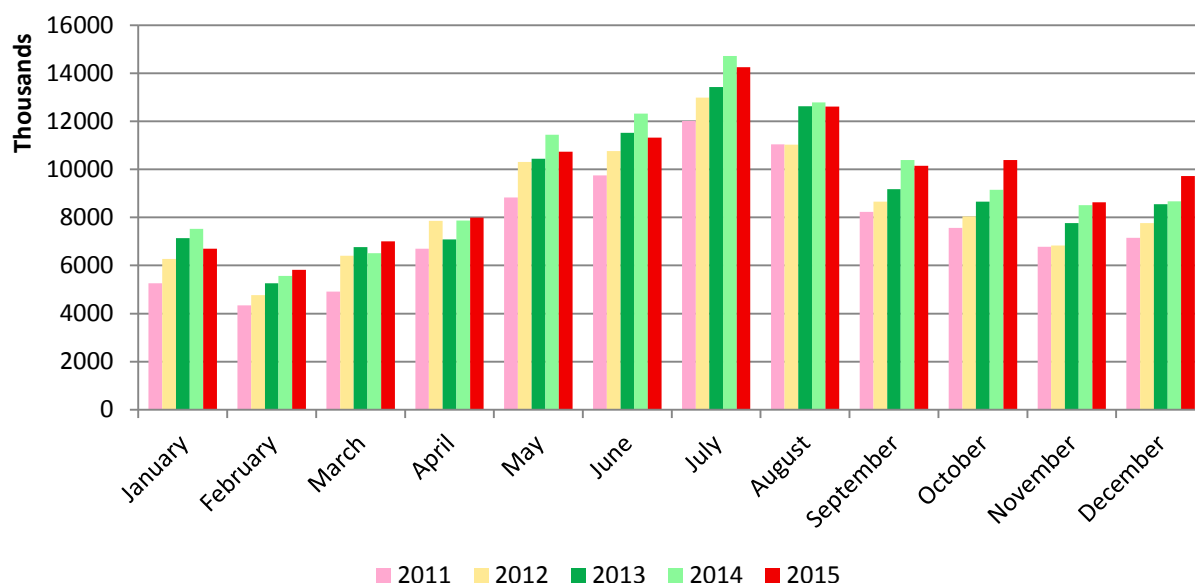
According to data collected by Statistics Estonia, the average occupancy rate of rooms in accommodation establishments in Tallinn in 2015 was 65% (an increase of 1%). The occupancy rate varies by month: it was lowest in January, when 45% of the rooms on offer were occupied, and highest in July (84%).

The average price per night was 41 euros, which is 3% higher than in 2014. The average price for accommodation was highest in September and November (44 euros) and lowest in February (38 euros).



Accommodation establishments in Tallinn earned a total of 115.3 million euros from sales of accommodation services in 2015 (no change from 2014)

Income from sale of accommodation services 2011-2015



Visits to Tourist Information Centre and tourist information channels

More than 263,000 people paid a visit to the Tourist Information Centre in 2015, which is 7% more than in the year before. 96% of those who used the services provided by the Tourist Information Centre were foreigners and 4% were locals.

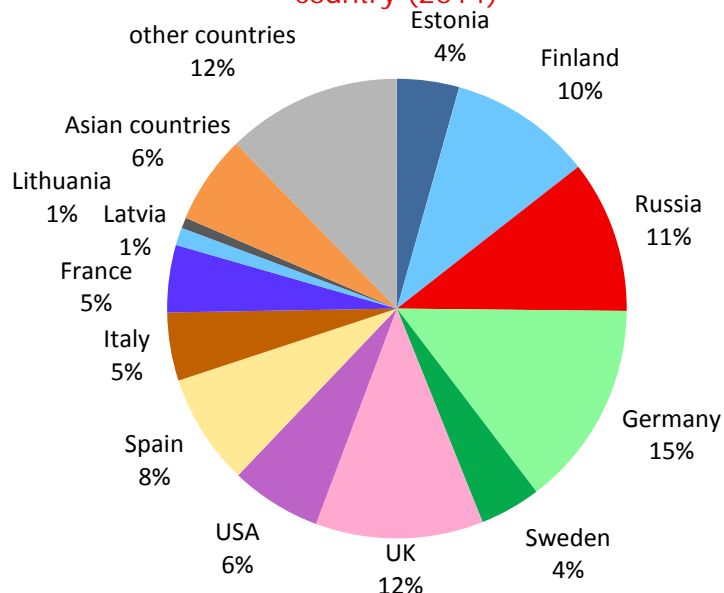
91% of visitors (238,825 people) find information on their own from the materials displayed while 9% (24,586) approach staff for information. In addition, the employees answer queries over the phone or by e-mail.

The visitors who approached the employees of the Tourist Information Centre in 2015 came from almost 90 different countries.

The centre received visitors from all continents and from more than 100 countries during the year. The majority came from European countries, although there was a large proportion of visitors from the USA (including Hawaii), countries in Central and South America, Asia and Oceania – including such exotic places as the Philippines, Nepal and Bahrein.

The majority of queries were made by Germans (3,461 queries; 14.5% of the total), British (2,822 or 11.8%) and Russians (2,565 or 11%). A large proportion of queries were also made by visitors from Spain and the USA. As a new trend, queries grew among visitors from Japan (825 or 3.4% of all queries) and China (397 or 1.7%). Among other countries, most queries were made by Dutch visitors (304 or 1.3% of all queries).

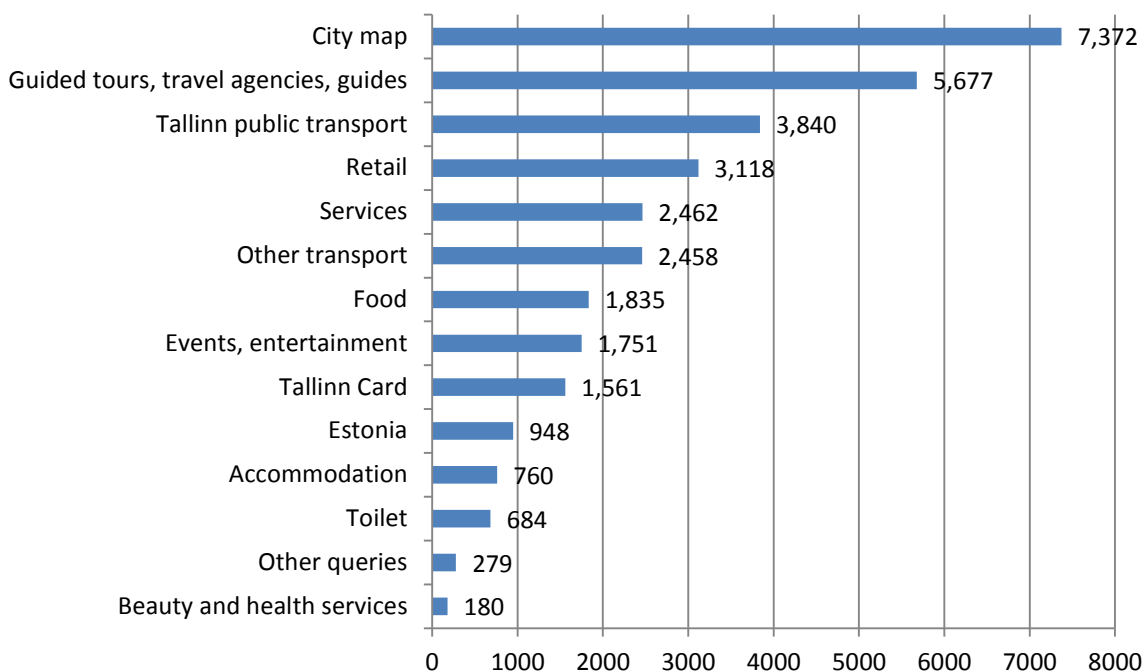
Visitors to Tallinn Tourist Information Centre by country (2014)



Visitors to the centre are mostly interested in sights, museums and guided tours; they also seek maps of the city. Information about public transport is sought as well.

Issues of interest include events, food, shopping and other services. Information about the weather, other destinations in Estonia and in-country public transport is also requested.

Queries at Tallinn Tourist Information Centre (2015)

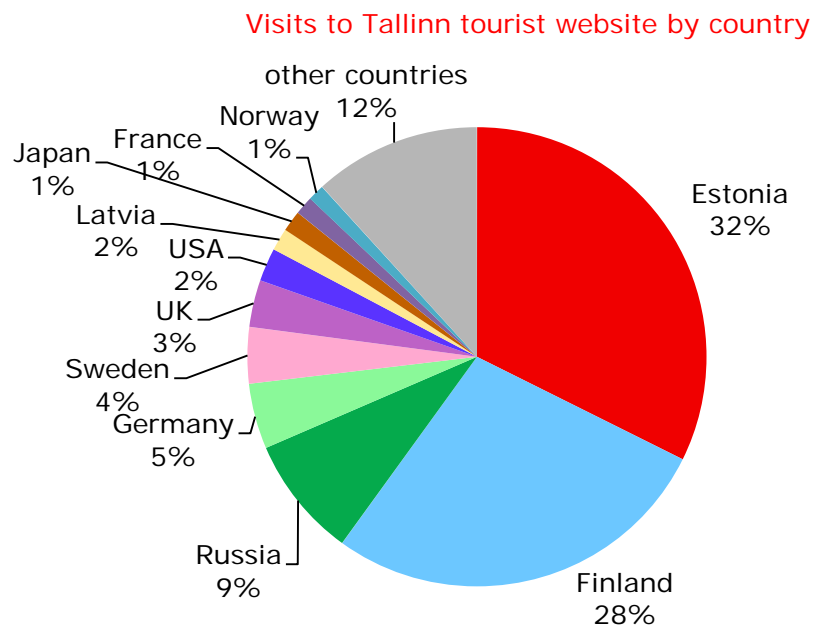


Visits to tourist website in 2015

Tallinn's tourist website was renewed in 2015. On 3 July a new responsive site was launched as well as a new domain name: visittallinn.ee.

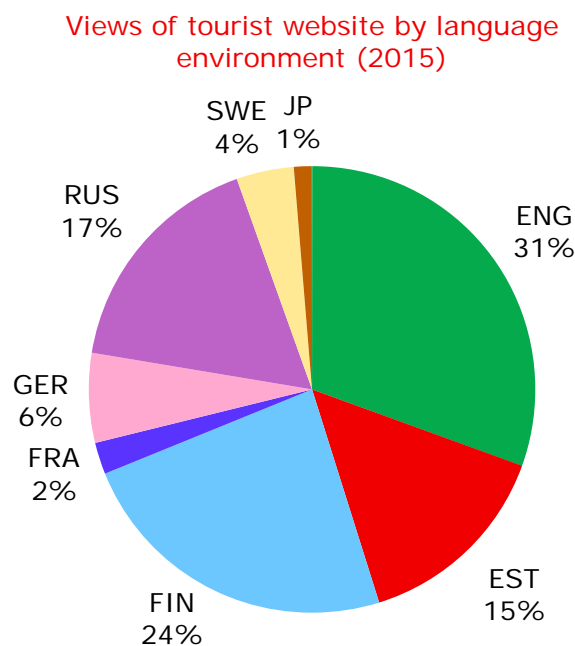
The website received more than 5 million page views in 2015.

The most visits to the website were made while in Estonia (32% of all visits), then from Finland (28%) and Russia (9%).



Visits to various language environments

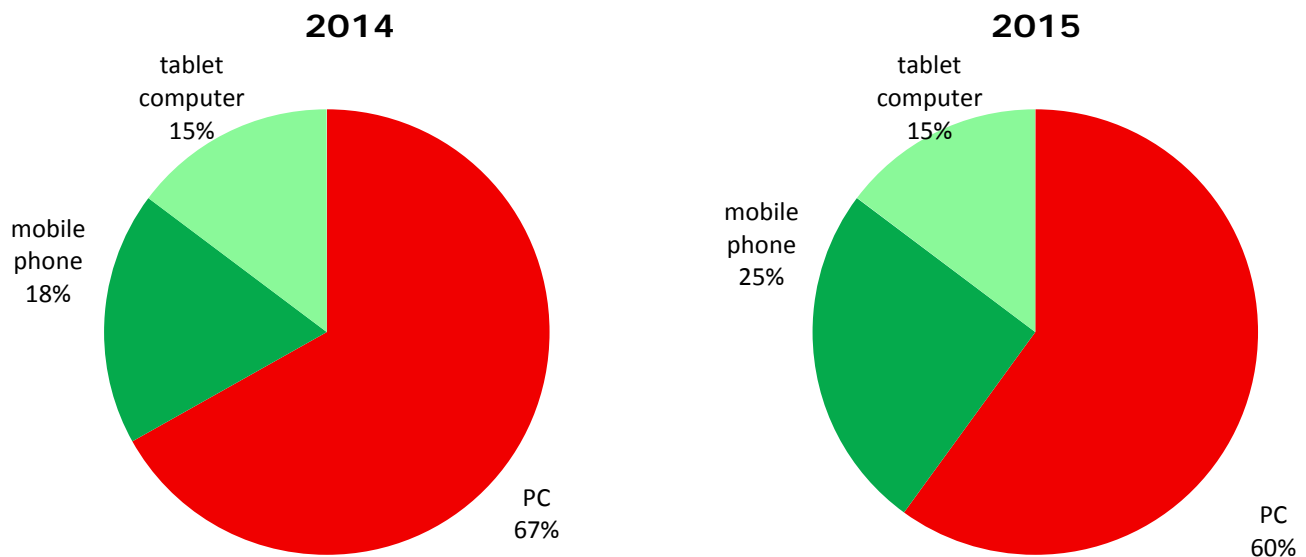
Visit numbers are highest for the English section of the website (1.7 million page views), followed by Finnish (1.3 million) and Russian (960,000).



Users by device type

When comparing visits to the Tallinn tourism website in 2014 and 2015, the rising trend of use of mobile devices can be noted.

In 2015 PCs were used for 60% of visits (67% in 2014), mobile phones for 25% of visits (18% in 2014) and tablets for 15% (the same levels as in 2014).



Arriving in Tallinn

Visitors arrived in Tallinn by ship and plane as well as overland by car, bus or train.

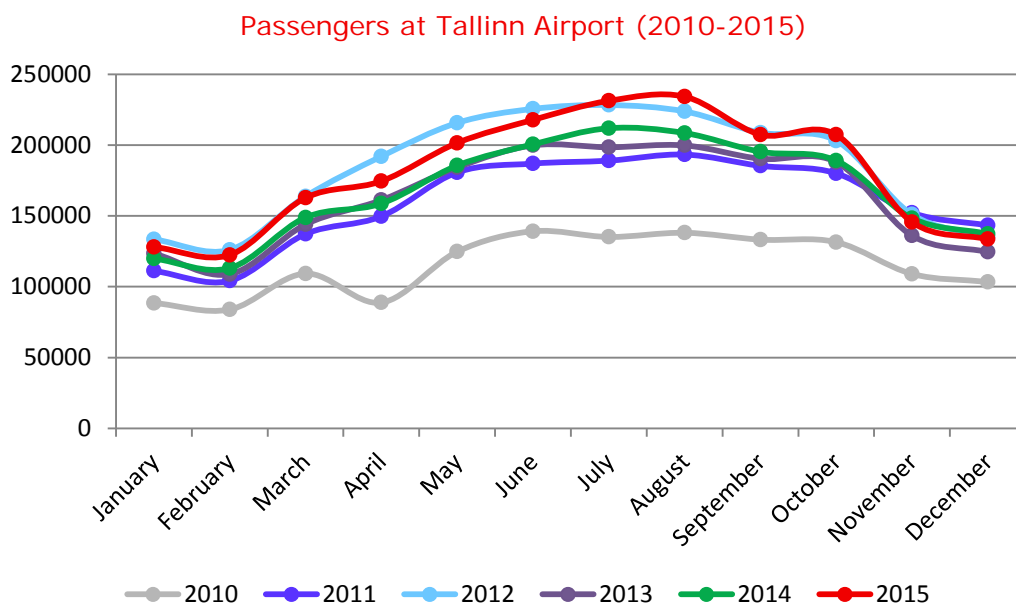
The following shows the numbers of passengers passing through the main 'gateways' of Tallinn, i.e. the airport and port.

Number of passengers at Tallinn Airport

In 2015 more than 2 million passengers passed through Tallinn Airport (2,166,663), which is an increase of 7% compared to the previous year (Tallinn Airport, 2016). The number of passengers increased most in August.



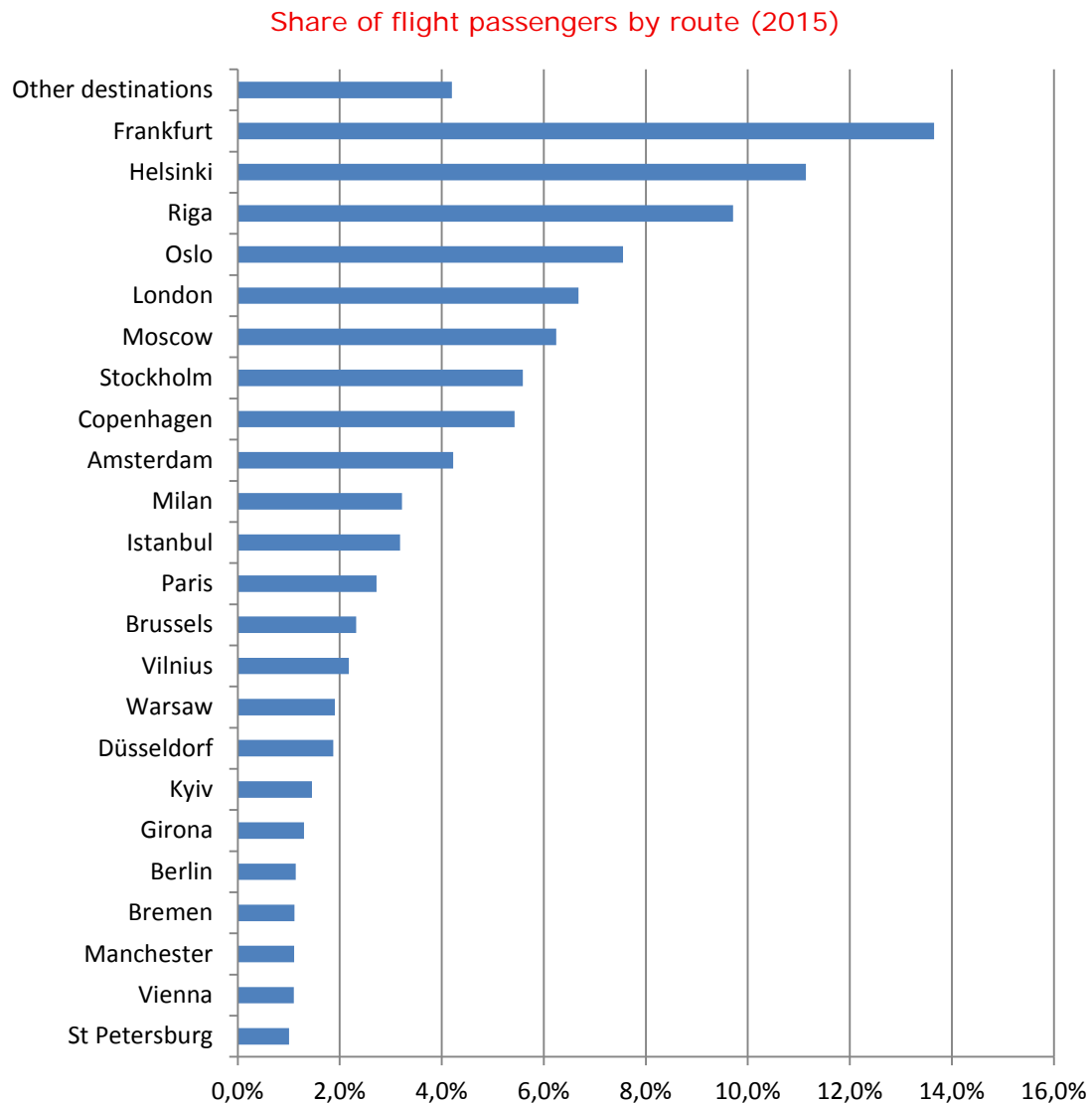
Source: Tallinn Airport (2016)



Source: Tallinn Airport (2016)

The majority of passengers were on international flights (99%). According to a passenger survey carried out in May 2015, those from foreign countries make up 43% and Estonian residents 57% of all air travellers passing through Tallinn Airport. These proportions can have seasonal fluctuations.

The most popular routes were between Tallinn and Frankfurt (13.6% of all passengers), Helsinki (11.1%) and Riga (9.7%).

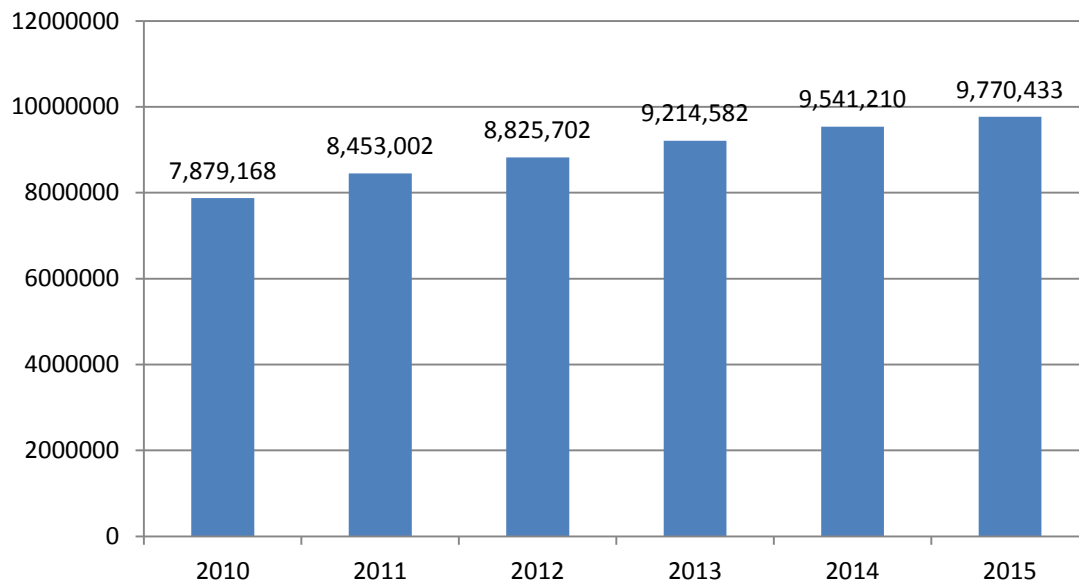


Source: Tallinn Airport (2016)

Number of passengers at Tallinn's Old City Harbour

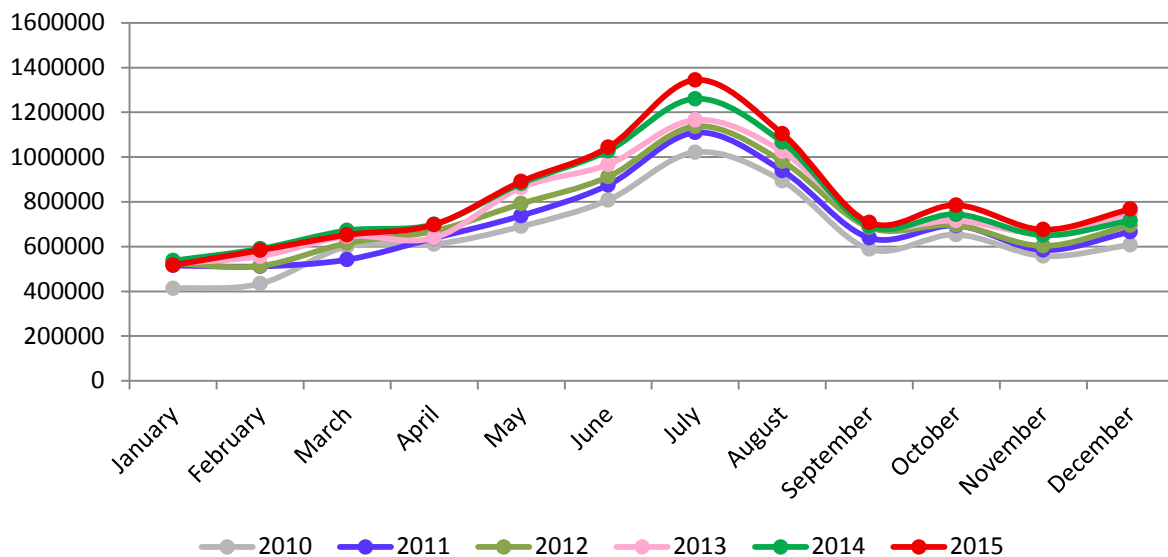
9,770,433 passengers passed through the Old City Harbour in 2015, which represents a 2% increase compared to the year before.

Passengers at Tallinn's Old City Harbour (2010-2015)



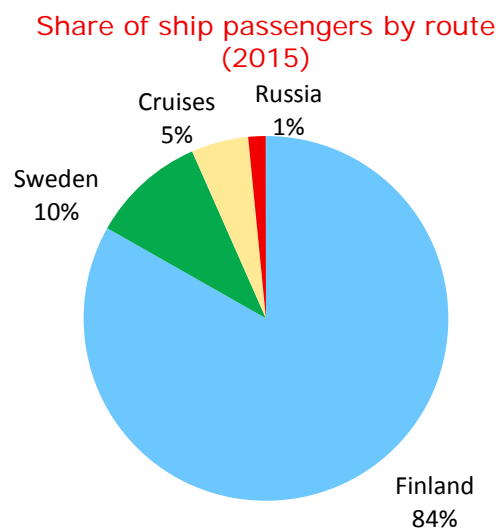
Source: Port of Tallinn (2016)

Passengers at Tallinn's Old City Harbour by month (2010-2015)



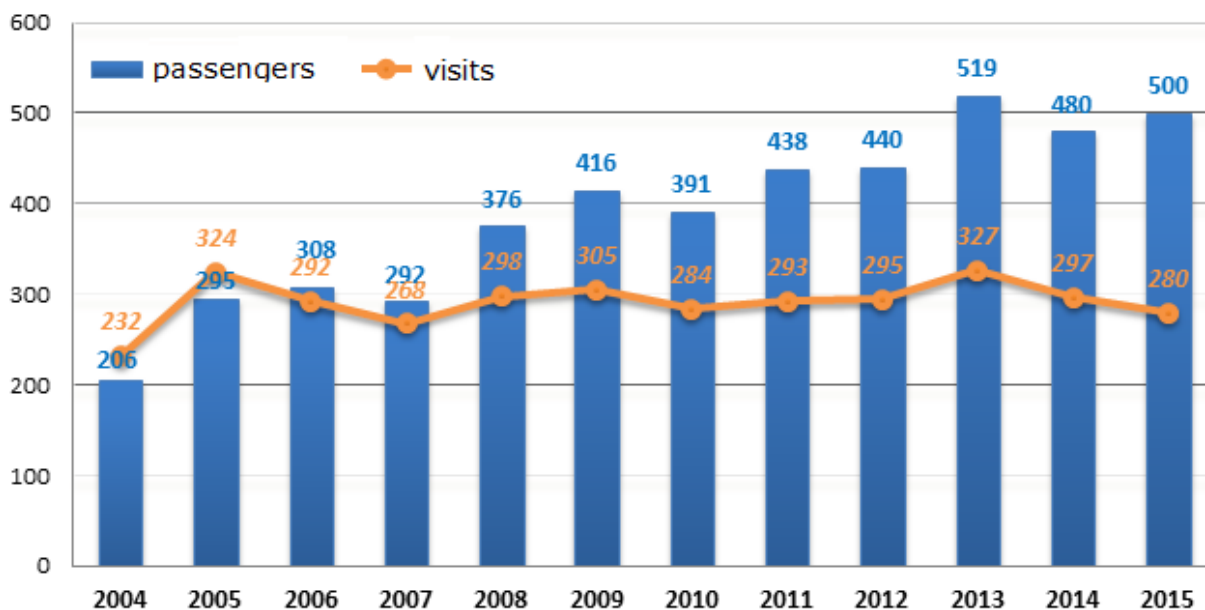
Source: Port of Tallinn (2016)

Finnish routes	8,213,809 passengers
Swedish routes	948,951 passengers
Russian routes	124,639 passengers
Cruise ships	504,245 passengers



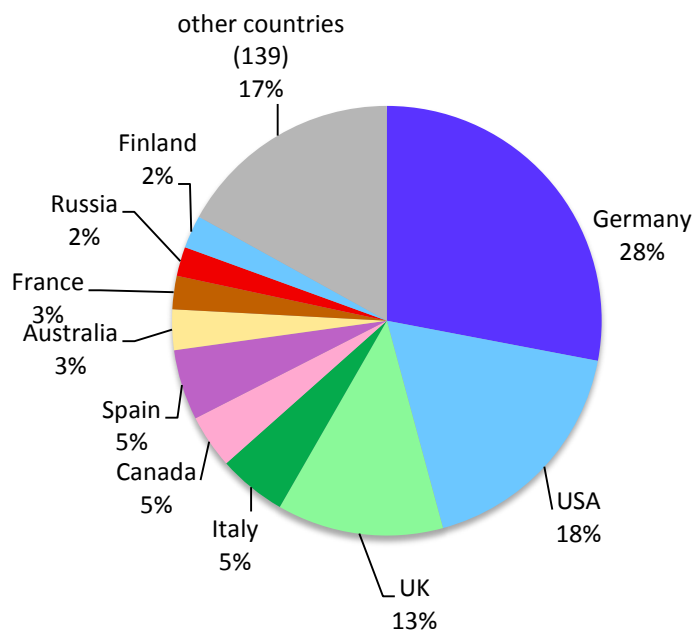
Source: Port of Tallinn (2016)

In 2015 a total of 280 cruise ships docks in Tallinn, bringing with them 500,622 visitors from 149 countries.



Source: Port of Tallinn (2016)

Cruise passengers by country (2014)



Conclusions

Approximately 4.3 million foreign tourists visited Tallinn in 2015.

Of all the foreign visitors to Tallinn, 1.8 million stayed overnight (42%). Of those, 78% stayed in accommodation establishments included in the sample of Statistics Estonia and 22% stayed with other accommodation providers or with friends and relatives. 2.5 million foreign visitors were same-day visitors, 0.5 million of them arriving on cruise ships.

A total of 1.6 million tourists stayed in accommodation establishments in Tallinn, which is a decrease of 1% compared to 2014. 87% of all visitors accommodated in Tallinn were international tourists and 13% were domestic tourists. All in all, tourists spent 2.8 million nights in Tallinn.

Tallinn continues to be valued as a holiday destination. 72% of the visitors who stayed in accommodation establishments in Tallinn were here for holidays, 21% came for business meetings, 5% were participating in conferences or training sessions and 2% were in town for other reasons. Compared to 2014, the number of those who participated in conferences and training grew significantly (+32%).

Visits to Tallinn tend to be distributed unevenly throughout the year - most visits occur during the three months of summer - and the trips are rather short (an average of just 1.77 nights).

Accommodation establishments earned 115 million euros from sales of accommodation services in 2015.

Interest in the Tallinn Tourist Information Centre has increased. The centre was visited by more than 263,000 people during the year, while the Tallinn tourism website had more than 5 million views.

Table 15. Tourists accommodated in Tallinn (2015), number of nights spent and length of trip

Country of origin	Accommodated (2015)			Overnight stays (2015)			Length of trip (nights)
	number	Change 2014/2015		number	Change 2014/2015		
		%	number		%	number	
Total	1,579,491	-1	-23,713	2,790,993	-2	-64,055	1.77
International tourists	1,381,575	-2	-30,426	2,470,426	-3	-67,414	1.79
Domestic tourists	197,916	4	6,713	320,567	1	3,359	1.62
Africa	1,784	6	107	4,316	4	174	2.42
incl. South Africa	414	4	15	1,085	30	249	2.62
Albania	139	-16	-26	290	-29	-119	2.09
Asia	57,799	29	12,900	91,636	21	16,108	1.59
incl. China	10,448	0	19	17,524	4	596	1.68
incl. Japan	21,869	34	5,500	34,357	22	6,310	1.57
incl. South Korea	10,181	58	3,748	12,089	28	2,645	1.19
Australia, Oceania	6,178	-20	-1,514	13,493	-22	-3,913	2.18
incl. Australia	5,128	-24	-1,609	11,493	-25	-3,813	2.24
incl. New Zealand	0	0	0	0	0	0	0.00
Austria	5,998	-4	-220	14,087	0	-14	2.35
Belgium	6,086	-3	-198	12,211	-10	-1,415	2.01
Bulgaria	1,565	11	161	3,762	12	412	2.40
Canada	3,724	-9	-390	8,458	-17	-1,741	2.27
Countries in Central and South America	6,917	15	878	13,661	5	628	1.97
incl. Brazil	3,346	39	942	5,931	23	1,107	1.77
Croatia	881	31	207	2,350	45	724	2.67
Cyprus	349	-8	-32	1,013	9	86	2.90
Czech Republic	3,829	-10	-429	11,305	4	419	2.95
Denmark	11,700	29	2,600	22,489	18	3,464	1.92
Finland	657,991	-1	-6,054	986,830	0	-2,806	1.50
France	18,779	0	88	44,109	1	342	2.35
Germany	82,254	3	2,605	177,792	-2	-3,603	2.16
Greece	2,615	13	308	5,466	-6	-330	2.09
Hungary	2,937	13	347	7,996	11	791	2.72
Iceland	865	28	187	2,305	37	626	2.66
Ireland	2,713	13	306	6,108	9	488	2.25
Italy	24,575	10	2,154	57,425	8	4,242	2.34
Latvia	52,253	21	8,898	83,056	19	13,477	1.59
Lithuania	35,230	4	1,495	59,005	-3	-1,822	1.67
Luxembourg	628	-13	-91	1,235	-23	-362	1.97
Malta	381	40	108	967	11	93	2.54
Norway	32,224	6	1,744	72,521	2	1,431	2.25
Poland	16,364	-12	-2,157	32,371	-11	-4,084	1.98
Portugal	3,020	-8	-265	7,220	1	38	2.39
Romania	2,168	6	131	6,867	10	647	3.17

Russia	113,600	-36	-63,454	224,583	-38	-138,383	1.98
Slovakia	1,715	28	377	5,663	26	1,161	3.30
Slovenia	1,374	-7	-108	2,926	-12	-389	2.13
Spain	24,614	8	1,728	74,197	34	18,955	3.01
Sweden	50,132	0	235	80,889	-3	-2,116	1.61
Switzerland	9,162	26	1,905	18,505	22	3,296	2.02
The Netherlands	12,335	10	1,170	27,337	9	2,178	2.22
Turkey	5,929	4	242	13,791	9	1,152	2.33
UK	40,704	4	1,490	90,978	4	3,272	2.24
Ukraine	10,554	7	679	23,197	18	3,577	2.20
USA	40,080	44	12,282	100,829	56	36,109	2.52
Other countries	17,883	272	13,079	32,346	250	23,114	1.81
Other European countries	11,547	-67	-23,899	24,841	-64	-43,321	2.15

Table 16. International tourists accommodated in Tallinn and their share by country of all international tourists (2015)

Country of origin	International tourists accommodated					Share of international tourists (2015)
	2015	Change 2014/2015		Change 2013/2014		
		%	number	%	number	
International tourists total	1,381,575	-2	-30,426	2	22,950	100%
Africa	1,784	6	107	19	266	0.13%
incl. South Africa	414	4	15	6	22	0.03%
Albania	139	-16	-26	54	58	0.01%
Asia	57,799	29	12,900	36	11,946	4.18%
incl. China	10,448	0	19	54	3,647	0.76%
incl. Japan	21,869	34	5,500	66	6,511	1.58%
incl. South Korea	10,181	58	3,748	1	47	0.74%
Australia, Oceania	6,178	-20	-1,514	27	1,633	0.45%
incl. Australia	5,128	-24	-1,609	28	1,490	0.37%
incl. New Zealand	0	0	0	0	0	0.00%
Austria	5,998	-4	-220	32	1,514	0.43%
Belgium	6,086	-3	-198	4	255	0.44%
Bulgaria	1,565	11	161	14	173	0.11%
Canada	3,724	-9	-390	38	1,124	0.27%
Countries in Central and South America	6,917	15	878	15	783	0.50%
incl. Brazil	3,346	39	942	-14	-385	0.24%
Croatia	881	31	207	5	34	0.06%
Cyprus	349	-8	-32	25	76	0.03%
Czech Republic	3,829	-10	-429	4	177	0.28%
Denmark	11,700	29	2,600	-4	-333	0.85%
Finland	657,991	-1	-6,054	2	15,183	47.63%
France	18,779	0	88	5	905	1.36%
Germany	82,254	3	2,605	13	8,868	5.95%
Greece	2,615	13	308	25	466	0.19%
Hungary	2,937	13	347	-13	-376	0.21%
Iceland	865	28	187	-35	-359	0.06%
Ireland	2,713	13	306	-10	-280	0.20%
Italy	24,575	10	2,154	0	36	1.78%

Latvia	52,253	21	8,898	-4	-1,615	3.78%
Lithuania	35,230	4	1,495	-2	-852	2.55%
Luxembourg	628	-13	-91	-6	-42	0.05%
Malta	381	40	108	-20	-69	0.03%
Norway	32,224	6	1,744	-4	-1,247	2.33%
Poland	16,364	-12	-2,157	-1	-169	1.18%
Portugal	3,020	-8	-265	31	769	0.22%
Romania	2,168	6	131	-6	-131	0.16%
Russia	113,600	-36	-63,454	-13	-27,178	8.22%
Slovakia	1,715	28	377	-2	-23	0.12%
Slovenia	1,374	-7	-108	43	445	0.10%
Spain	24,614	8	1,728	12	2,523	1.78%
Sweden	50,132	0	235	-4	-2,076	3.63%
Switzerland	9,162	26	1,905	4	302	0.66%
The Netherlands	12,335	10	1,170	-4	-424	0.89%
Turkey	5,929	4	242	6	314	0.43%
UK	40,704	4	1,490	4	1,633	2.95%
Ukraine	10,554	7	679	5	446	0.76%
USA	40,080	44	12,282	18	4,183	2.90%
Other European countries	11,547	-67	-23,899	16	4,873	0.84%
Other countries	17,883	272	13,079	-15	-861	1.29%

Table 17: Overnight stays by international tourists accommodated in Tallinn and their share by country of all international tourists (2015)

Country of origin	Overnight stays by accommodated international tourists					Share of international tourists (2015)
	2015	Change 2014/2015		Change 2013/2014		
		%	number	%	number	
Overnight stays by international tourists total	2,470,426	-3	-67,414	1	29,694	100%
Africa	4,316	4	174	15	525	0.17%
incl. South Africa	1,085	30	249	-4	-35	0.04%
Albania	290	-29	-119	63	158	0.01%
Asia	91,636	21	16,108	33	18,893	3.71%
incl. China	17,524	4	596	24	3,233	0.71%
incl. Japan	34,357	22	6,310	59	10,389	1.39%
incl. South Korea	12,089	28	2,645	17	1,392	0.49%
Australia, Oceania	13,493	-22	-3,913	28	3,783	0.55%
incl. Australia	11,493	-25	-3,813	30	3,544	0.47%
incl. New Zealand	0	0	0	0	0	0.00%
Austria	14,087	0	-14	16	1,908	0.57%
Belgium	12,211	-10	-1,415	4	582	0.49%
Bulgaria	3,762	12	412	13	383	0.15%
Canada	8,458	-17	-1,741	47	3,277	0.34%
Countries in Central and South America	13,661	5	628	23	2,454	0.55%
incl. Brazil	5,931	23	1,107	-17	-975	0.24%
Croatia	2,350	45	724	-26	-580	0.10%
Cyprus	1,013	9	86	25	188	0.04%
Czech Republic	11,305	4	419	19	1,757	0.46%

Denmark	22,489	18	3,464	4	668	0.91%
Finland	986,830	0	-2,806	2	15,000	39.95%
France	44,109	1	342	1	226	1.79%
Germany	177,792	-2	-3,603	18	27,814	7.20%
Greece	5,466	-6	-330	10	532	0.22%
Hungary	7,996	11	791	-11	-855	0.32%
Iceland	2,305	37	626	-39	-1,055	0.09%
Ireland	6,108	9	488	-14	-948	0.25%
Italy	57,425	8	4,242	-1	-282	2.32%
Latvia	83,056	19	13,477	-1	-559	3.36%
Lithuania	59,005	-3	-1,822	-6	-4,002	2.39%
Luxembourg	1,235	-23	-362	8	123	0.05%
Malta	967	11	93	6	47	0.04%
Norway	72,521	2	1,431	-5	-3,808	2.94%
Poland	32,371	-11	-4,084	-11	-4,537	1.31%
Portugal	7,220	1	38	24	1,406	0.29%
Romania	6,867	10	647	4	231	0.28%
Russia	224,583	-38	-138,383	-13	-54,488	9.09%
Slovakia	5,663	26	1,161	7	311	0.23%
Slovenia	2,926	-12	-389	28	720	0.12%
Spain	74,197	34	18,955	12	5,725	3.00%
Sweden	80,889	-3	-2,116	-5	-4,038	3.27%
Switzerland	18,505	22	3,296	11	1,544	0.75%
The Netherlands	27,337	9	2,178	-2	-401	1.11%
Turkey	13,791	9	1,152	-1	-154	0.56%
UK	90,978	4	3,272	0	213	3.68%
Ukraine	23,197	18	3,577	-9	-1,923	0.94%
USA	100,829	56	36,109	19	10,191	4.08%
Other European countries	24,841	-64	-43,321	15	9,052	1.01%
Other countries	32,346	250	23,114	-4	-387	1.31%

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