



Overview of Tourism Trends in Tallinn in 2016

Tallinn City Tourist Office & Convention Bureau

www.visittallinn.ee

Introduction

Tallinn's tourism overview is a regular publication examining tourism trends in the city which is published by Tallinn City Tourist Office & Convention Bureau.

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), 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 2016 spent the night in Tallinn.

A total of 3,324,914 tourists stayed in Estonian accommodation establishments in 2016, 1,680,056 of whom (51%) stayed in Tallinn.

1,680,056 tourists stayed in accommodation establishments in Tallinn in 2016 (a 6% increase on the previous year).

Compared to 2015, there was an increase in the number of domestic tourists as well as in the number of international tourists.

Total accommodated 1,680,056 +6% ↑

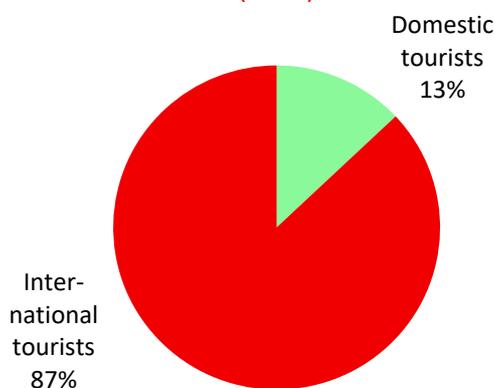
Incl.:

international tourists 1,461,937 +6% ↑

domestic tourists 218,119 +10% ↑

Of all tourists in 2016, international tourists accounted for 87% and domestic tourists for 13%.

Tourist accommodated in Tallinn (2016)



Visitors from the neighbouring countries of Finland (47%) and Russia (8%) dominated among international tourists. The number of tourists from all main markets was on the rise. In numbers, the amount of tourists from Finland showed the largest increase (+32,053 tourists, i.e. +5%). The number of tourists from Russia grew as well (+10,553 tourists, i.e. +9%) as did tourists from Asia (+8,114 tourist, i.e. +14%).

Tourists accommodated by main country of origin

Finland	690,044	+5% ↑	47% of all foreign tourists
Russia	124,153	+9% ↑	8% of all foreign tourists
Germany	88,330	+7% ↑	6% of all foreign tourists
Latvia	54,281	+4% ↑	4% of all foreign tourists
Sweden	53,481	+7% ↑	4% of all foreign tourists
United Kingdom	40,757	0%	3% of all foreign tourists
Norway	32,796	+2% ↑	2% of all foreign tourists
Other countries	378,095	+7% ↑	26% of all foreign tourists

Changes on other markets:

Asia	65,913	+14% ↑	5% of all foreign tourists
Lithuania	37,686	+7% ↑	3% of all foreign tourists
USA	33,383	-17% ↓	2% of all foreign tourists
Italy	28,746	+17% ↑	2% of all foreign tourists

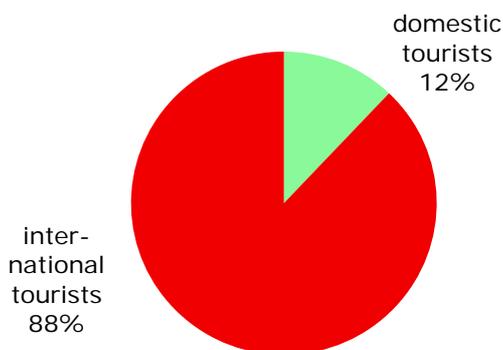
Spain	28,607	+16%↑	2% of all foreign tourists
France	21,902	17%↑	1% of all foreign tourists

Tourists spent a total of 2,997,156 nights in accommodation establishments in Tallinn (an increase of 7% on the previous year).

Total nights spent:	2,997,156	+7% ↑
incl.		
nights spent by international tourists	2,635,329	+7% ↑
nights spent by domestic tourists	361,827	+13% ↑

Nights spent by international tourists accounted for 88% and those by domestic tourists accounted for 12% of the total.

Overnight stays of tourists accommodated in Tallinn (2016)



Nights spent by tourists by main country of origin

Finland	1,054,689 nights	+7% ↑	40% of all nights spent by foreign tourists
Russia	241,614 nights	+8% ↑	9% of all nights spent by foreign tourists
Germany	195,119 nights	+10% ↑	7% of all nights spent by foreign tourists
United Kingdom	89,291 nights	-2% ↓	3% of all nights spent by foreign tourists
Latvia	89,152 nights	+7% ↑	3% of all nights spent by foreign tourists
Sweden	88,615 nights	+10% ↑	3% of all nights spent by foreign tourists
Norway	76,538 nights	+6% ↑	3% of all nights spent by foreign tourists
Other countries	800,311 nights	+6% ↑	30% of all nights spent by foreign tourists

Changes on other markets:

Asia	104,547 nights	+14% ↑	4% of all nights spent by foreign tourists
USA	81,633 nights	-19% ↓	3% of all nights spent by foreign tourist
Lithuania	73,518 nights	+25% ↑	3% of all nights spent by foreign tourists
Spain	67,199 nights	-9% ↓	3% of all nights spent by foreign tourists
Italy	66,067 nights	+15% ↑	3% of all nights spent by foreign tourists
France	49,108 nights	+11% ↑	2% of all nights spent by foreign tourists

The average length of stay between January and December 2016 was 1.78 nights, which is longer than in 2015 (+1%).

Most tourists came for leisure purposes.

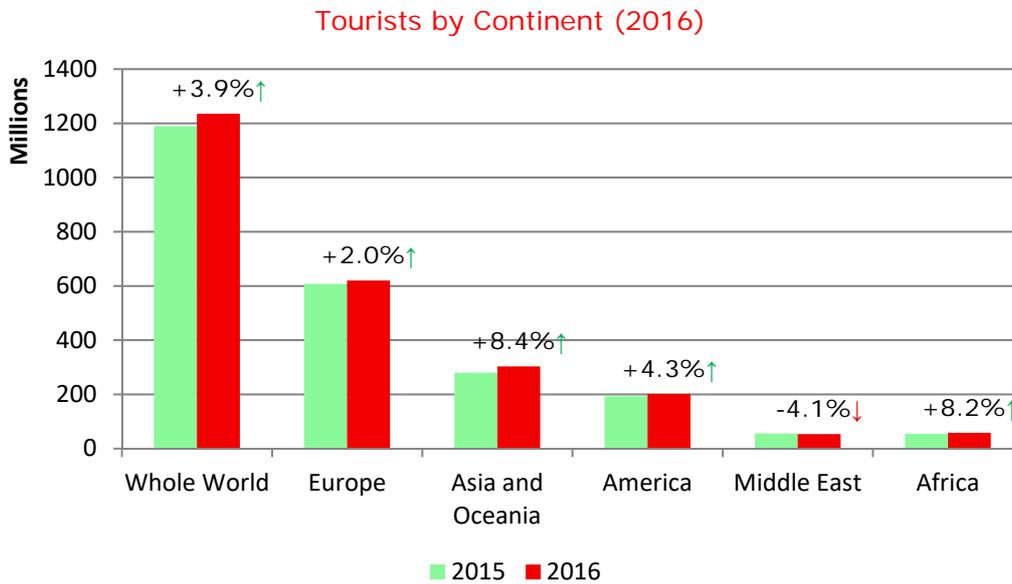
72% of visits to the city were for leisure, 22% were business trips, 4% were for participation in conferences or training and 2% were for other reasons.

The average room occupancy of accommodation establishments in 2016 was 65% (did not change) and the average price was 42 euros (an increase of 1%).

Tallinn Airport served a total of 2,221,615 passengers in 2016 (an increase of 3%) and Tallinn's Old City Harbour served over 10 million passengers (an increase of 4%).

Estonia and Tallinn as tourism destinations in Europe and globally

More than 1.235 billion tourists travelled globally in 2016, which is a 3.9% increase compared to 2015. Of all the destination regions in the world, Europe received 50%, i.e. 619,7 million visitors (UNWTO, 2017).



Source: World Tourism Barometer, Advance Release (UNWTO, January 2017)

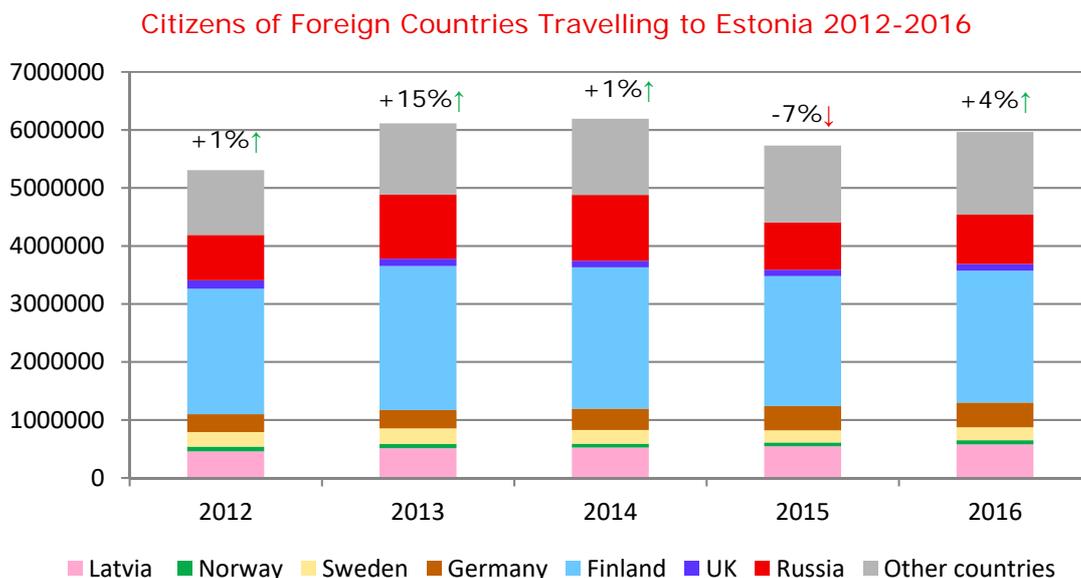
The number of tourists increased in the European region by 2% in 2016 year-on-year. The 28 countries in the European Union received 81% of all tourists to Europe, 4.3% more tourists in 2016 than in 2015.



Source: World Tourism Barometer, Advance Release (UNWTO, January 2017)

Visits to Estonia

According to the Bank of Estonia (2017), 6 million foreign visitors visited Estonia in 2016¹ (an increase of 4% in comparison with 2015).



Source: Bank of Estonia (2017)

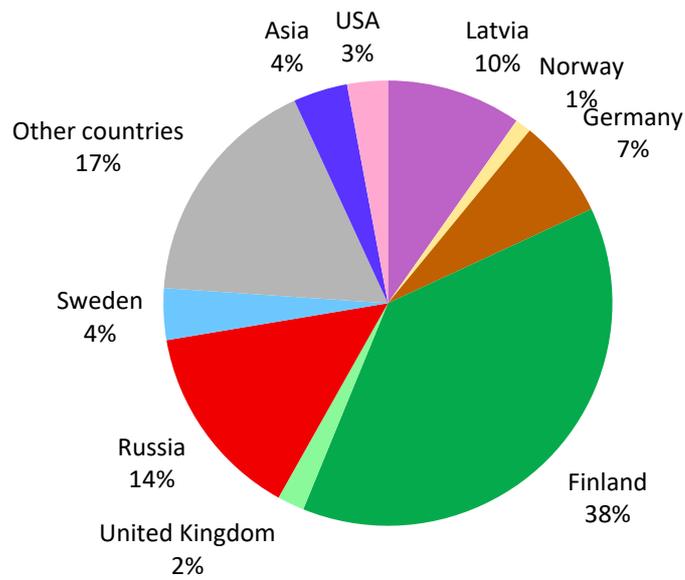
Visitors from the EU made up most (74%) of all visits by foreign residents to Estonia. Visitors from Finland accounted for 38% (2.3 million visits, increase of 1%)

Residents of Russia visited Estonia on 850,000 occasions, which was 4% more than the previous year and made up 14% of all visits. Visits from Latvia made up 10% (580,000 visits, increase of 6%) and visits from Germany 7% (430,000 visits, increase of 3%). There was an increase also in the number of visits from Sweden (increase of 6%) and Lithuania (increase of 8%).

Visitors from Asia accounted for 4% of all visits by foreign residents to Estonia (increase of 7%) From the United States of America made up 9% of all visits to Estonia by foreign residents and there were 30,000 more trips made than the previous year (increase of 21%).

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

Visits to Estonia by foreign residents (2016)



Source: Bank of Estonia (2017)

Visits to Tallinn by foreign residents

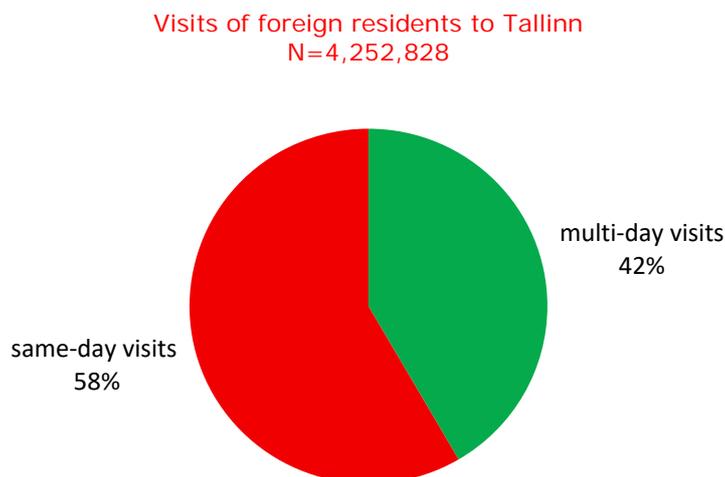
According to mobile positioning data, 71% of all foreign visitors to Estonia visited Tallinn (Positium LBS 2017).

Visits of foreign residents to Tallinn: 4,252,828 +4% ↑

Incl.:

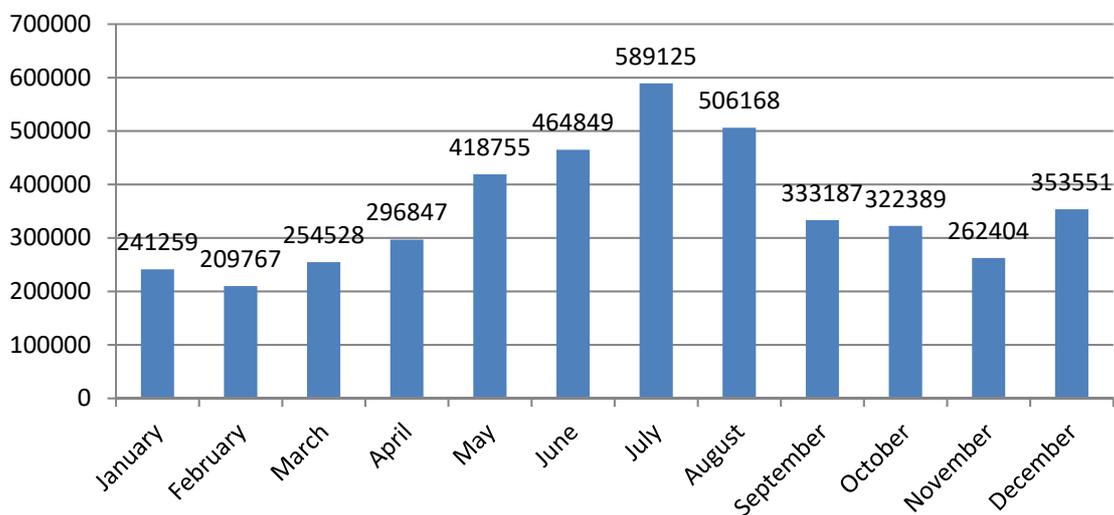
Multi-day visits 1,769,542 +7% ↑

Same-day visits 2 483,286 +3% ↑

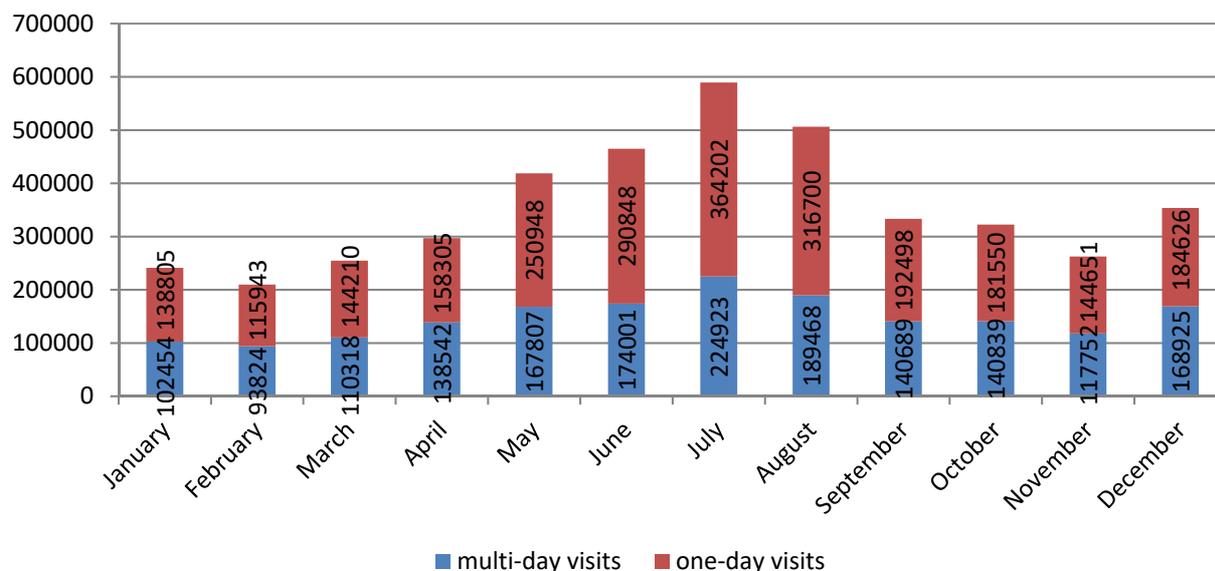


Source: Positium LBS (2017)

Visits to Tallinn by foreign residents 2016



Multi-day visits and same-day visits to Tallinn by foreign residents (2016)



Most of the visits were made from Finland – a total of 1.85 million (increase of 2%), accounting for 44% of all visits to Tallinn by foreign residents (40% of those were multi-day visits and 60% were one-day visits).

453,000 visits were made by residents of Russia (increase of 8%), comprising 11% of all visits (44% of those were multi-day visits and 56% were one-day visits).

Next in sequence by number of visits were German residents with 310,000 visits (increase of 2%) comprising 7% of all visits by foreign residents (38% were multi-day visits and 62% were one-day visits).

Visits of foreign residents to Tallinn by country (2016)

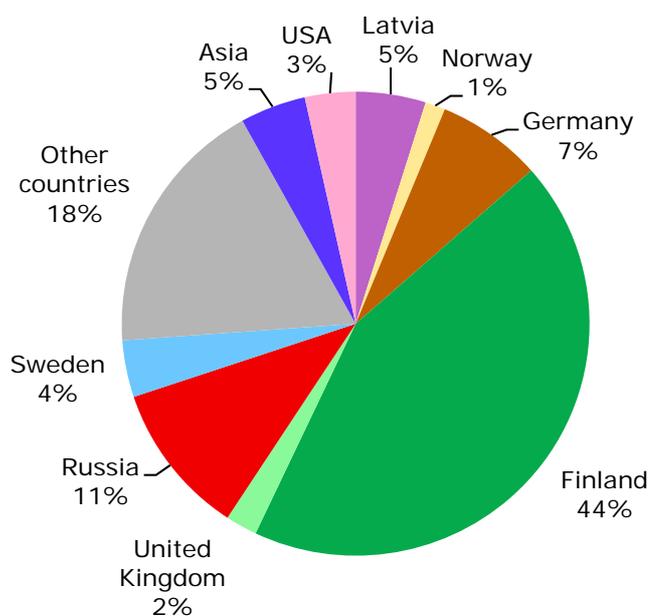
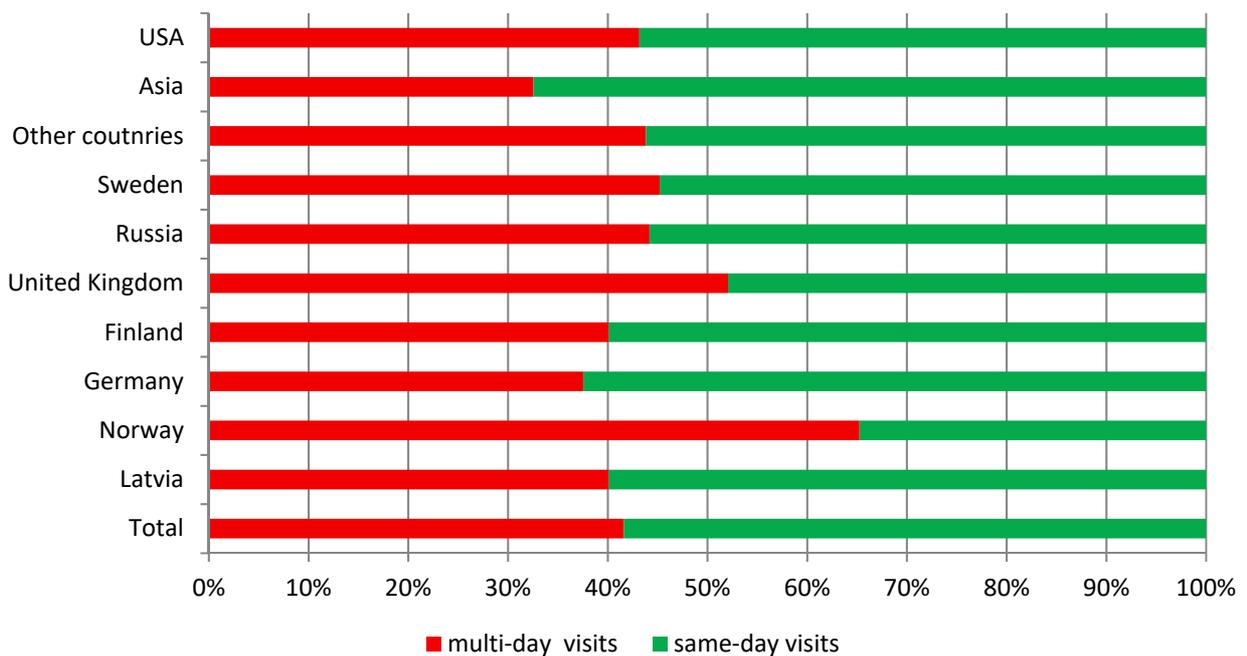


Table 1. Visits of foreign residents to Tallinn 2016

Country	Total number of visits	Multi-day visits		Same-day visits		Share of all visits to Tallinn
		number	%	number	%	
Total	4,252,828	1,769,542	42%	2,483,286	58%	
Finland	1,850,649	742,334	40%	1,108,315	60%	43.52%
Russia	453,209	200,264	44%	252,945	56%	10.66%
Germany	310,093	116,461	38%	193,632	62%	7.29%
Asia	193,839	63,083	33%	130,756	67%	4.56%
incl. China	30,968	13,092	42%	17,876	58%	0.73%
incl. Japan	89,981	31,298	35%	58,683	65%	2.12%
incl. South-Korea	72,890	18,693	26%	54,197	74%	1.71%
USA	148,602	64,141	43%	84,461	57%	3.49%
Latvia	205,907	82,612	40%	123,295	60%	4.84%
Sweden	168,491	76,171	45%	92,320	55%	3.96%
United Kingdom	93,706	48,787	52%	44,919	48%	2.20%
Norway	58,924	38,448	65%	20,476	35%	1.39%
Other countries	769,408	337,241	44%	432,167	56%	18.09%

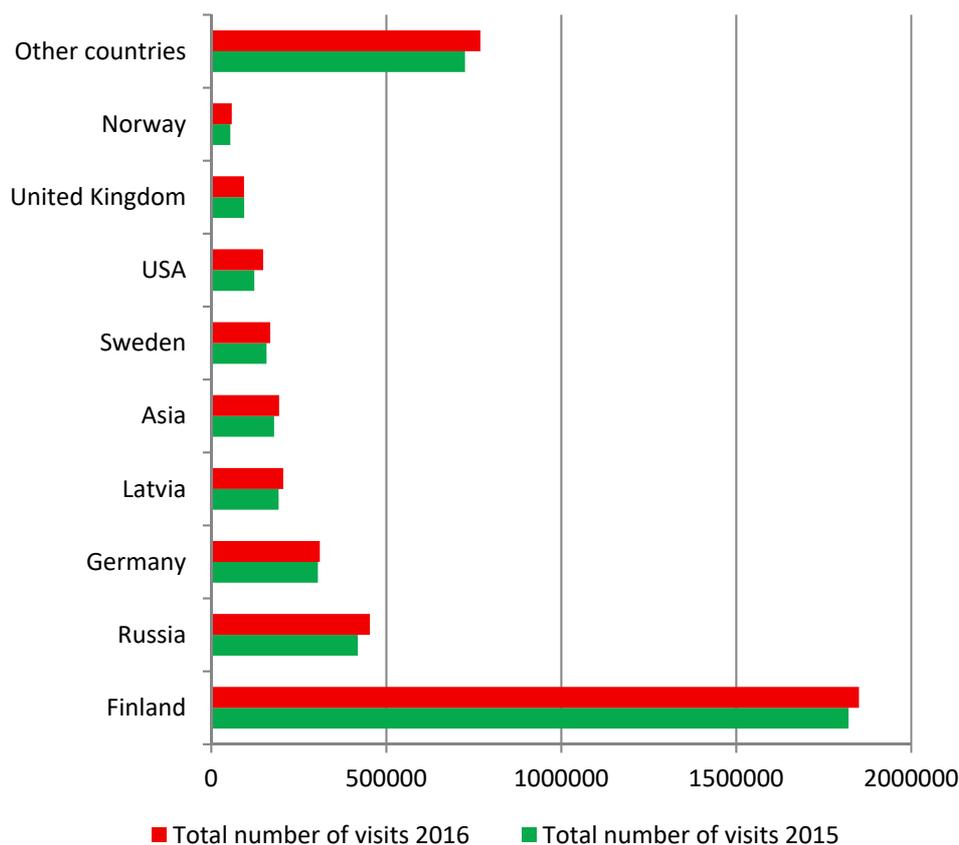
Source: Positium LBS (2017)

Multi-day visits and same-day visits to Tallinn by foreign residents 2016



Source: Positium LBS (2017)

Visits to Tallinn by foreign residents in 2015 and 2016



Source: Positium LBS (2017)

Accommodation statistics

Data from Statistics Estonia (2017) show that a total of 3.32 million tourists stayed in accommodation establishments in Estonia in 2016 (7% more than in the previous year), including 2.06 million international tourists (6.6% increase over the previous year) and 1.27 million domestic tourists (7.2% increase over the previous year).

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

A total of 1.68 million tourists stayed in accommodation establishments in Tallinn (6% more than the year before), accounting for 51% of all accommodated tourists in Estonia with 1,461,937 of them being international tourists (6% more than the year before) and 218,119 domestic tourists (10% more than the year before).

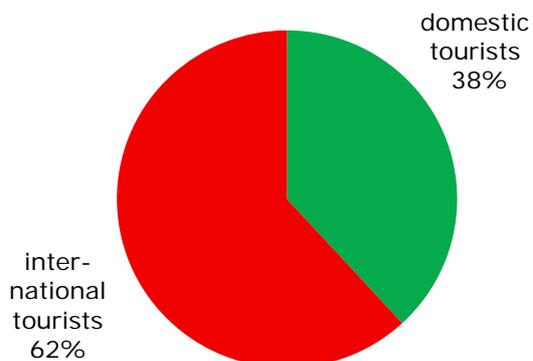
A total of 6.23 million nights were spent in accommodation establishments in Estonia by tourists. 3 million nights were spent by tourists in accommodation establishments in Tallinn (increase of 7%), representing 48% of all nights spent in Estonia by tourists. Nights spent by domestic tourists in Tallinn totalled 361,827 (increase of 13%) and nights spent by international tourists totalled 2,635,329 (increase of 7%).

Table 2. Accommodated tourists in Estonia and Tallinn 2016

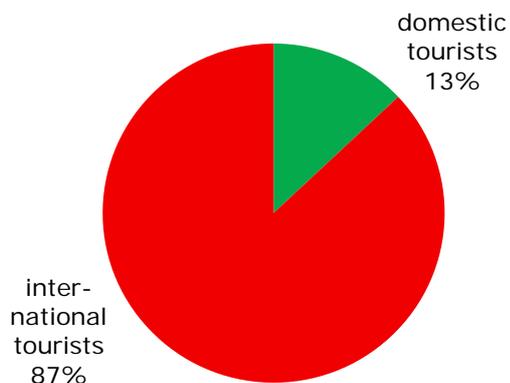
	Accommodated tourists in Estonia (2016)		Accommodated tourists in Tallinn (2016)		
	Number	Change 2015/2016	Number	Change 2015/2016	Share of persons accommodated in Tallinn of Estonian total
Total	3,324,914	+6.8%↑	1,680,056	+6.4%↑	51%
International	2,056,526	+6.6%↑	1,461,937	+5.8%↑	71%
Domestic	1,268,388	+7.2%↑	218,119	+10.2%↑	17%

Source: Statistics Estonia (2017)

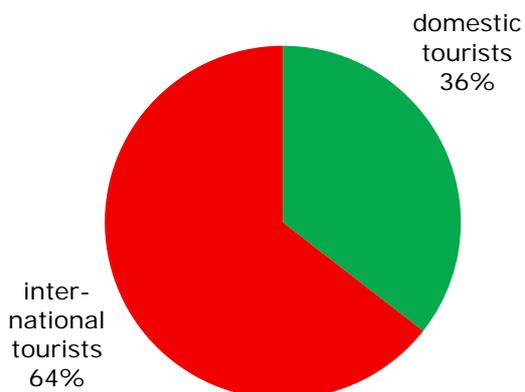
Accommodated tourists, Estonia



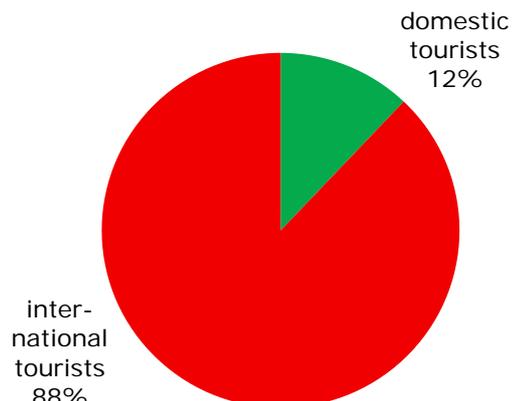
Accommodated tourists, Tallinn



Bed-nights, Estonia



Bed-nights, Tallinn



Visits to Tallinn by foreign residents and bed-nights in accommodation establishments in 2016

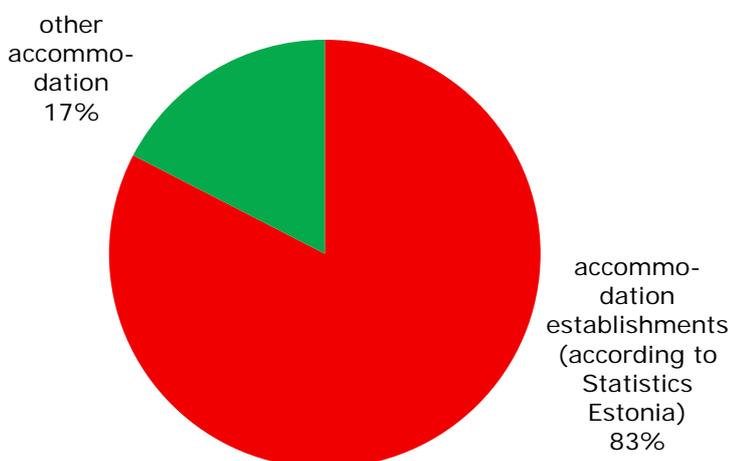
According to data retrieved from Positium LBS mobile positioning (2017), Tallinn was visited by 4.25 million foreign residents in 2016, of whom 42% or 1.8 million spent the night in Tallinn.

Among same-day visits, 473,558 were by cruise passengers (Port of Tallinn 2017).

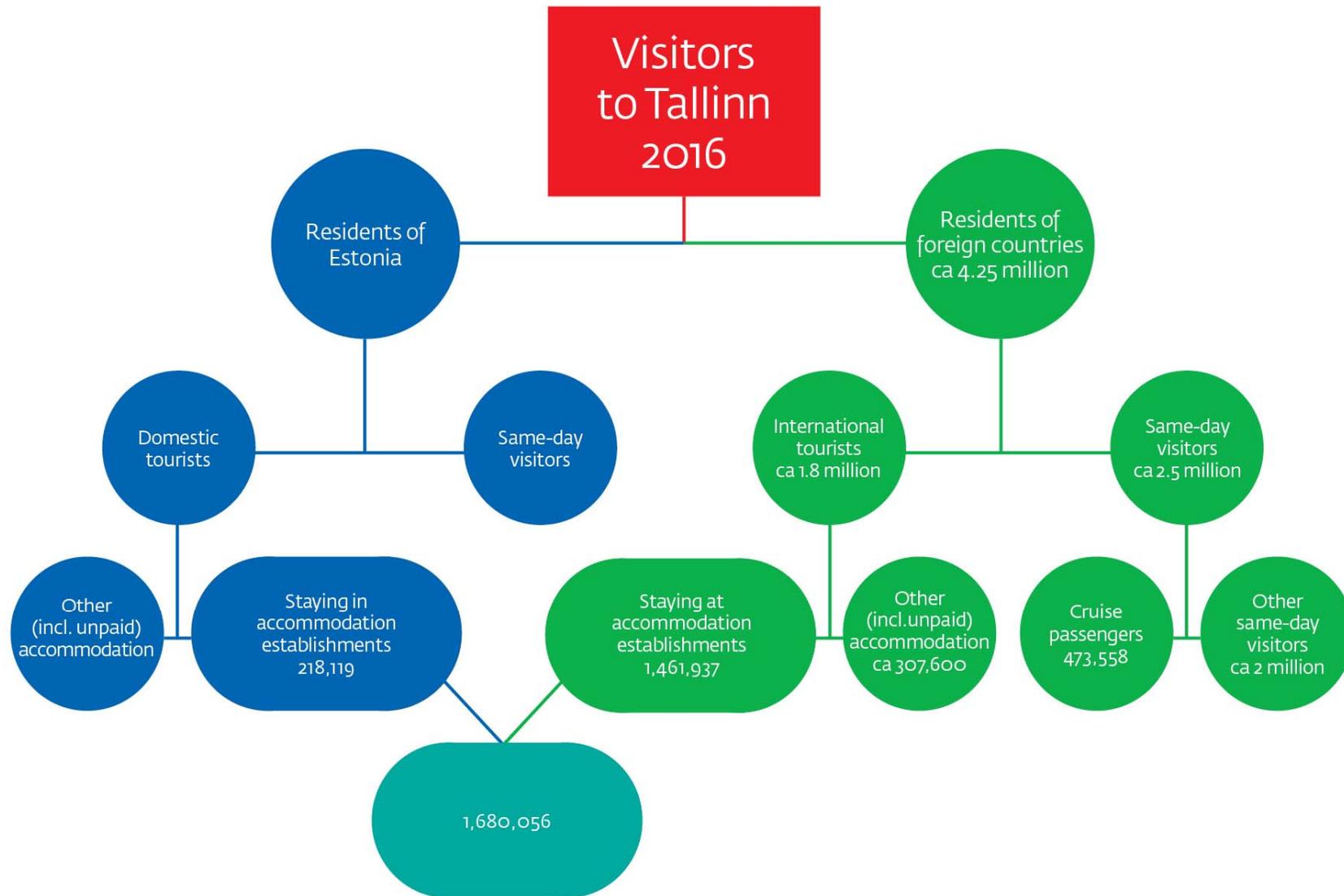
According to the data of Statistics Estonia, 1,461,937 international tourists stayed in accommodation establishments in 2016 (including establishments with at least five beds). Based on the Positium LBS data on visits by foreign residents to Tallinn, and subtracting the number of international tourists who stayed in accommodation establishments, it can be estimated that 307,605 foreign residents used other types of accommodation, which accounts for 17% 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	1,769,542
Accommodated tourists (according to Statistics Estonia)	1,461,937
Other accommodation	307,605

Overnight visits to Tallinn by foreign residents



Graph 1. Division of visitors to Tallinn in 2016



Tourists accommodated in Tallinn - numbers and countries of origin

According to Statistics Estonia, 1,680,056 tourists stayed in accommodation establishments in Tallinn in 2016 (a 6% increase compared to previous year).

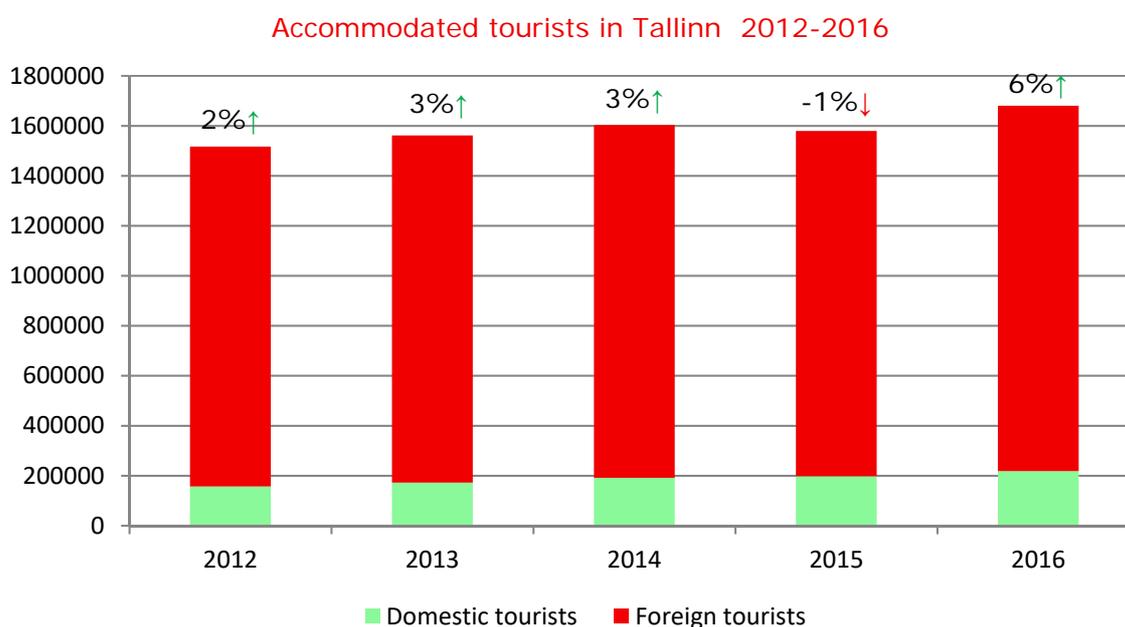
Domestic tourists accounted for 13% of all visits, while international tourists made up 87% of all tourists who visited Tallinn.

Total accommodated: 1,680,056 +6%↑ +100,565 people

Incl.:

international tourists 1,461,937 +6%↑ +80,362 people

domestic tourists 218,119 +10%↑ +20,203 people



The main target markets continue to be countries in Europe, which account for 92% of all tourists.

When comparing the number of visits with 2014, the number of foreign tourists has increased by 4% (49,936 tourists more than in 2014). At the same time, the number of domestic tourists has increased by 14% (26,916 tourists more).

Table 3. Tourists accommodated in Tallinn by continent

Region of origin	Number	Change 2015/2016		Share of all tourists	Share of international tourists
		%	Number		
Europe	1,543,165	6.8%↑	+98,093	91.9%	90.6%
America	44,614	-12.0%↓	-6,107	2.7%	3.1%
Asia	65,913	14.0%↑	+8,144	3.9%	4.5%
Africa	1,831	2.6%↑	+47	0.1%	0.1%
Oceania	7,105	15.0%↑	+927	0.4%	0.5%
Unspecified	17,428	-2.5%↓	-455	1.0%	1.2%
Foreign countries total	1,461,937	5.8%↑	+80,362	87%	100%
Domestic tourists total	218,119	10.2%↑	+20,203	13%	
All tourists total	1,680,056	6.4%↑	+100,565	100%	

Source: Statistics Estonia / TourMis (2017)

According to the accommodation statistics, the largest markets are Finland, Russia and Germany.

Of all accommodated foreign tourists 47% (690,044 tourists) were from Finland (an increase of 5%), 8% from Russia (124,153 tourists, increase of 9%), 6% from Germany (88,330 tourists, increase of 7%). Numbers of tourists from other close markets was also higher: tourists from Sweden increased by 7%, tourists from Latvia by 4% and tourists from Norway by 2%.

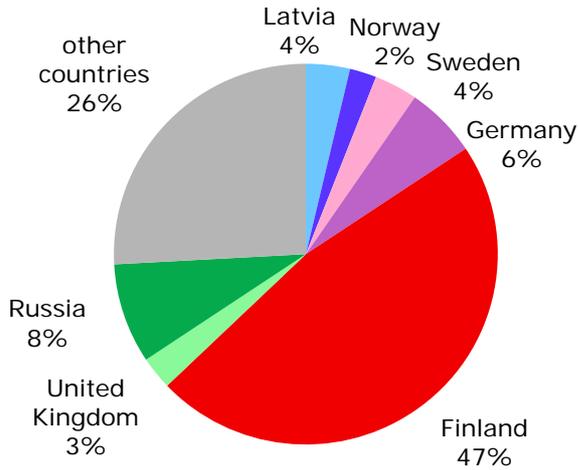
The number of tourists from Asia increased by 14% (65,913 tourists) and made up 5% of all foreign tourists to Tallinn in 2016.

More tourists compared to 2015 also arrived from Lithuania (7% increase), Italy (17% increase), Spain (16% increase) and France (17%).

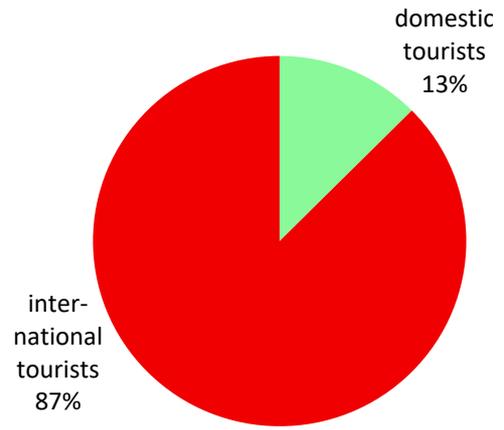
Table 4. Main foreign markets of Tallinn in 2016

Country	International tourists accommodated in 2016			Share of all international tourists
	Number	Change 2015/2016		
		%	Number	
Finland	690,044	5%↑	+32,053	47%
Russia	124,153	9%↑	+10,553	8%
Germany	88,330	7%↑	+6,076	6%
Latvia	54,281	4%↑	+2,028	4%
Sweden	53,481	7%↑	+3,349	4%
UK	40,757	0%↑	+53	3%
Norway	32,796	2%↑	+572	2%
Other countries	378,095	7%↑	+25,678	26%
Foreign countries total	1,461,937	+6%↑	+80,362	100%

Share of international tourists by country (2016)



Distribution of tourists (2016)



Source: Statistics Estonia (2017)

International tourists from main target markets in Tallinn by country (2016)

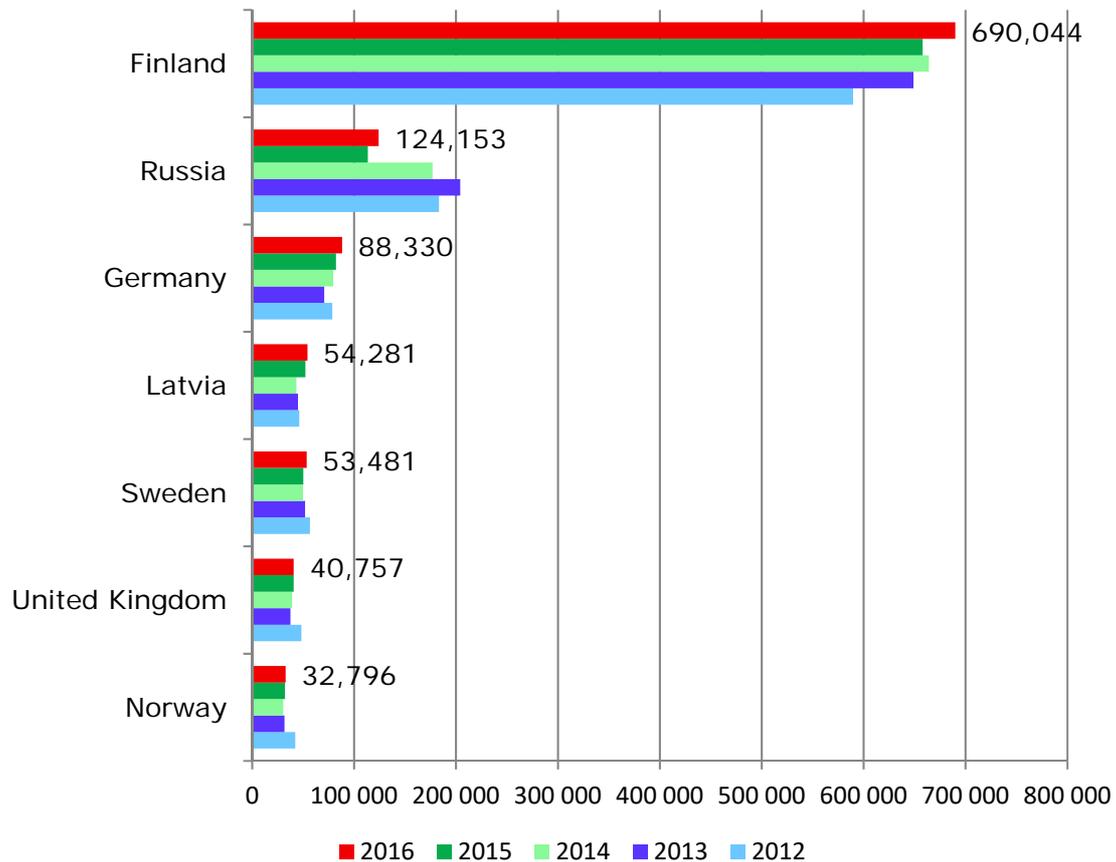
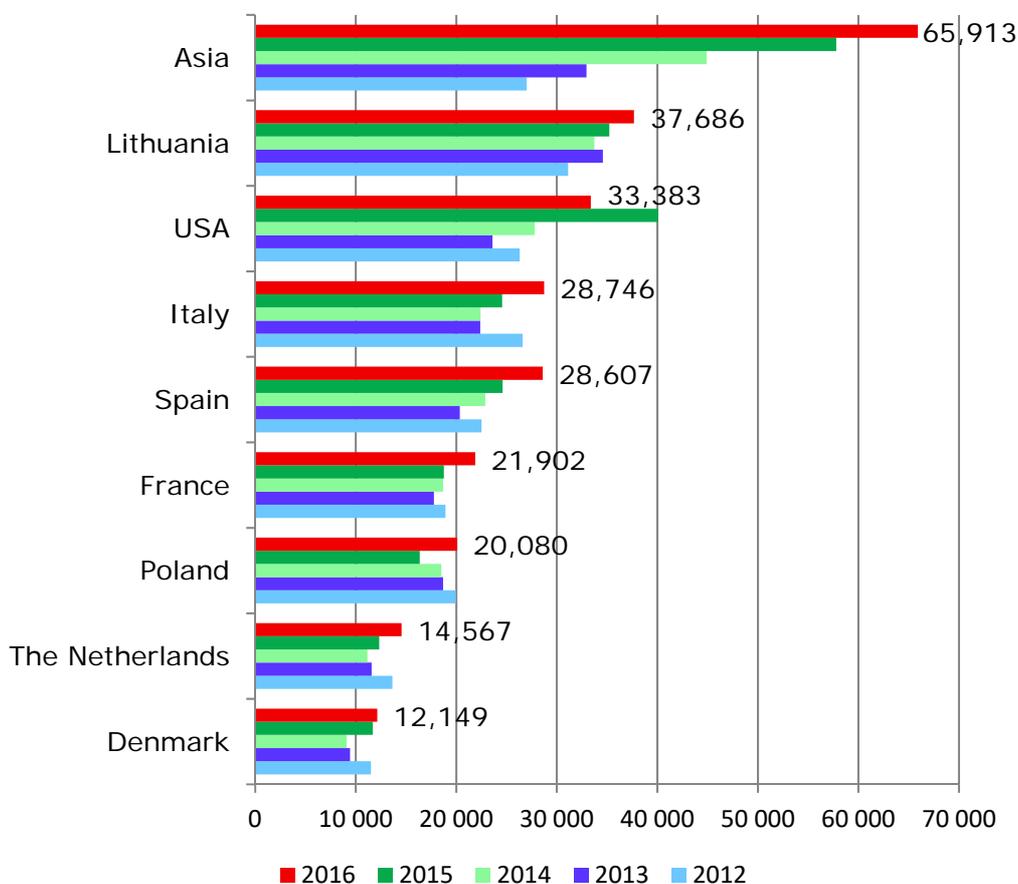


Table 5. Changes in other foreign markets (2016)

Country	International tourists accommodated (2016)			Share of all international tourists
	Number	Change 2015/2016		
		%	Number	
Asia	65,913	14%↑	+8,114	4.51%
incl. China	12,326	18%↑	+1,878	0.84%
incl. Japan	22,953	5%↑	+1,084	1.57%
incl. South Korea	11,438	12%↑	+1,257	0.78%
Lithuania	37,686	7%↑	+2,456	2.58%
USA	33,383	-17%↓	-6,697	2.28%
Italy	28,746	17%↑	+4,171	1.97%
Spain	28,607	16%↑	+3,993	1.96%
France	21,902	17%↑	+3,123	1.50%
Poland	20,080	23%↑	+3,716	1.37%
The Netherlands	14,567	18%↑	+2,232	1.00%
Denmark	12,149	4%↑	+449	0.83%
Ukraine	10,136	-4%↓	-418	0.69%

Other significant target markets (2016)



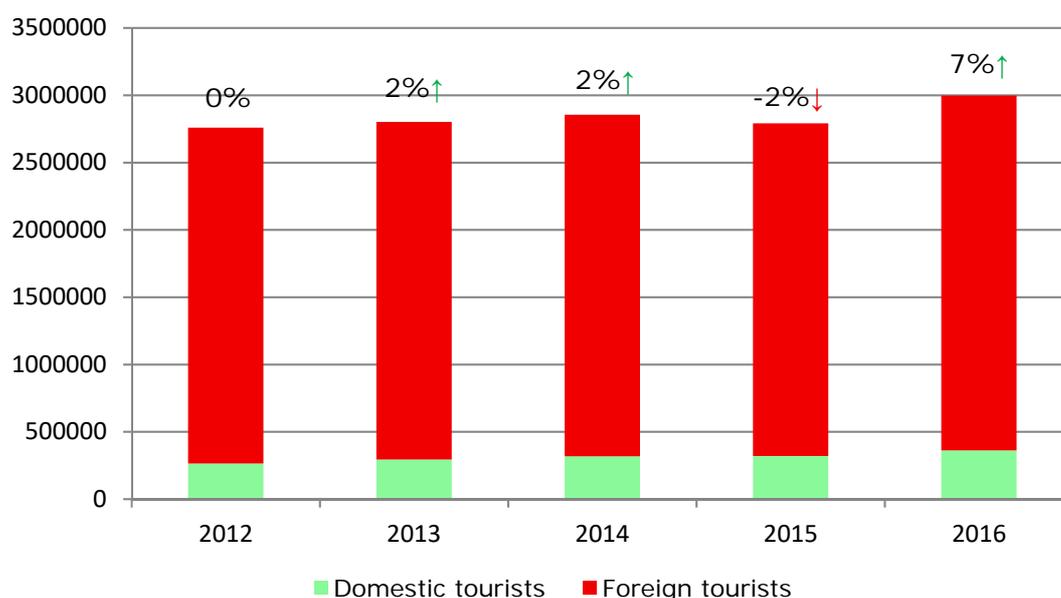
Overnight stays of tourists accommodated in Tallinn

The number of overnight stays of tourists accommodated in Tallinn increased by 7% in 2016.

Overnight stays by international tourists increased by 7%, and those by domestic tourists increased by 13%.

Overnight stays total:	2,997,156	+7% ↑	+206,163 nights
Incl.:			
by international tourists	2,635,329	+7% ↑	+164,903 nights
by domestic tourists	361,827	+13% ↑	+41,260 nights

Nights spent in Tallinn by tourists in Tallinn (2012-2016)



Of the main target markets for overnight stays, nights spent by Finnish tourists increased by 7%, nights by Russian tourist by 8%, nights by Latvian tourists by 7% nights by tourists from Sweden and Germany by 10% and nights by tourists from Norway increased by 6% while the nights spent by tourists from the United Kingdom decreased by 2%.

Table 6. Overnight stays from main foreign markets of Tallinn, 2016

Country of origin	Overnight stays by accommodated international tourists, 2016			Share of all overnight stays by international tourists
	Number	Change 2015/2016		
		%	Number	
Finland	1,054,689	7%↑	+67,859	40%
Russia	241,614	8%↑	+17,031	9%
Germany	195,119	10%↑	+17,327	7%
United Kingdom	89,291	-2%↓	-1,687	3%
Latvia	89,152	7%↑	+6,096	3%
Sweden	88,615	10%↑	+7,726	3%
Norway	76,538	6%↑	+4,017	3%
Other countries	800,311	6%↑	+46,534	30%
Foreign	2,635,329	7%↑	+164,903	100%

countries total				
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Table 7. Changes in other foreign markets in 2016

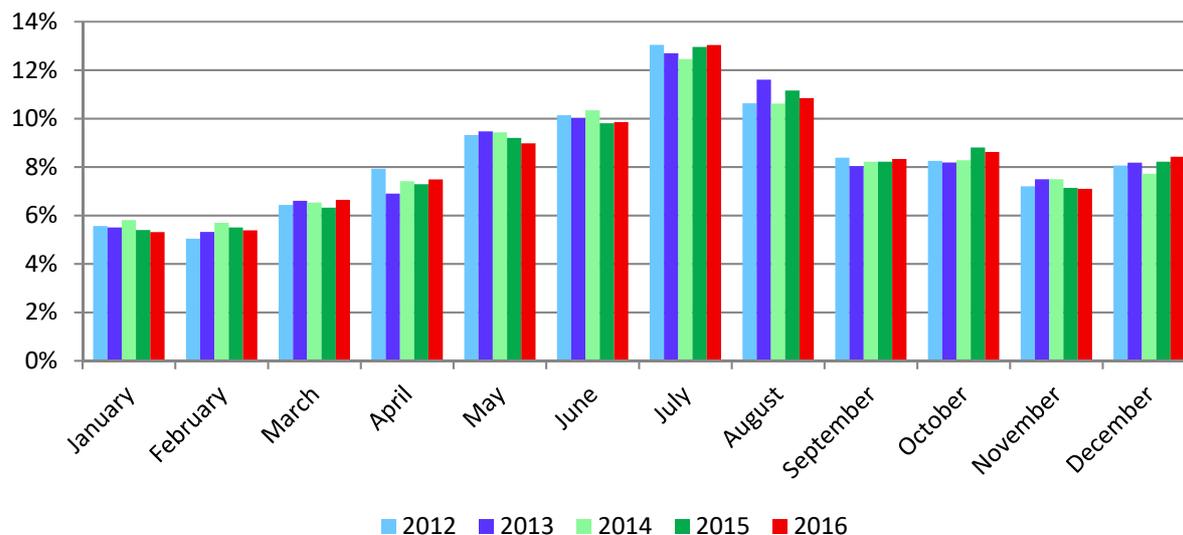
Country of origin	Overnight stays by accommodated international tourists (2016)			Share of all overnight stays by international tourists
	Number	Change 2015/2016		
		%	Number	
Asia	104,547	14%↑	+12,911	3.97%
incl. China	21,731	24%↑	+4,207	0.82%
incl. Japan	37,113	8%↑	+2,756	1.41%
incl. South Korea	14,030	16%↑	+1,941	0.53%
USA	81,633	-19%↓	-19,196	3.10%
Lithuania	73,518	25%↑	+14,513	2.79%
Spain	67,199	-9%↓	-6,998	2.55%
Italy	66,067	15%↑	+8,642	2.51%
France	49,108	11%↑	+4,999	1.86%
Poland	41,554	28%↑	+9,183	1.58%
The Netherlands	32,484	19%↑	+5,147	1.23%
Denmark	22,793	1%↑	+304	0.86%
Belgium	22,590	85%↑	+10,379	0.86%

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 2016 was 0.154² (0.158 in 2015 and 0.143 in 2014).

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 visitors to Tallinn by month (Gini=0.154)

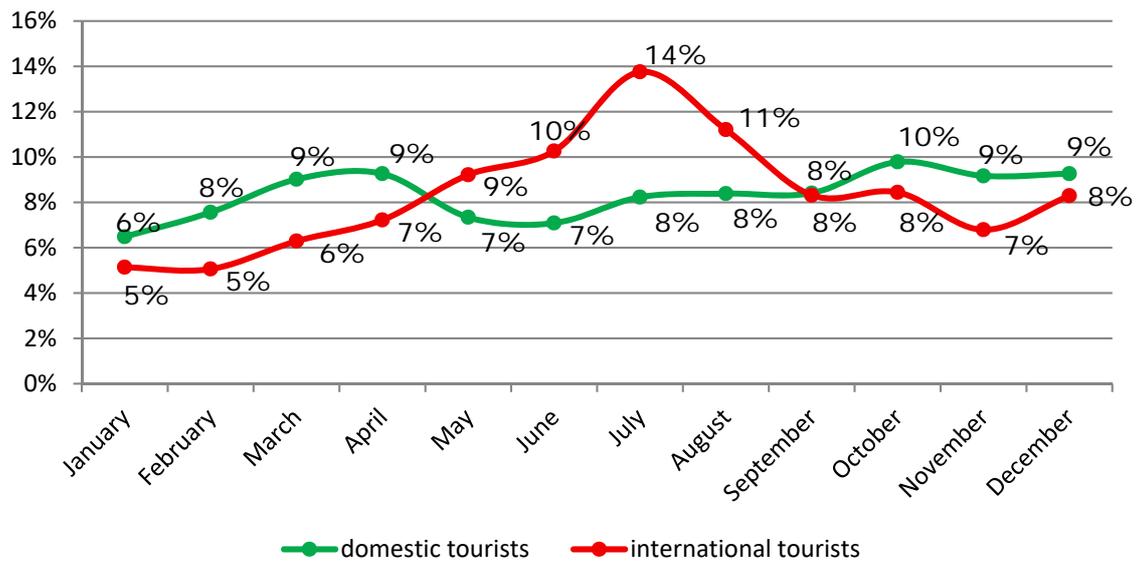


More than a third (34%) of all visitors in 2016 were served in accommodation establishments during the three summer months. More than half (51%) of all visits to Tallinn were made between May and September. A large proportion (67%) of visitors to the capital who used the services of accommodation establishments visited Tallinn between April and October.

Domestic tourists mostly visit Tallinn in spring and autumn, international tourists mostly during summer months.

A larger share of international tourists (53%) visited Tallinn between May and September. The most popular month among international tourists was July, accounting for 14% of all international visits in 2016. Visits by domestic tourists was most active in spring (in March and April 18% of all visits to Tallinn by domestic tourists were made) and the last three months of the year (with the period from October to December) received 28% of all visits by domestic tourists to Tallinn during the year. The month that received the largest share of visits by domestic tourists was October (10% of all visits to Tallinn by domestic tourists).

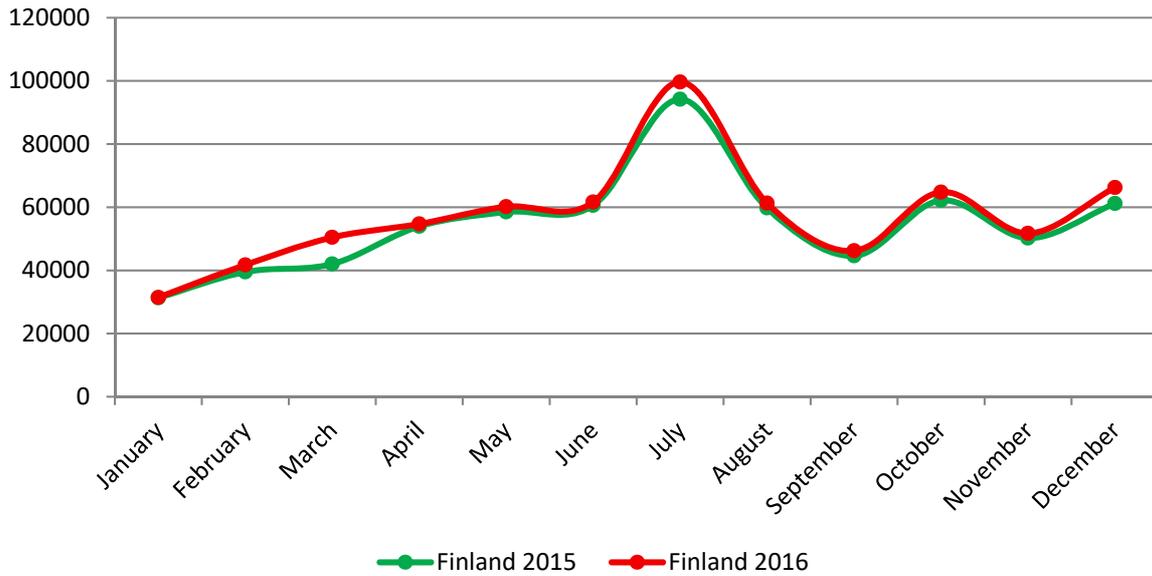
Distribution of nights by international and domestic tourists by month (2016)



Seasonality can also be seen across target markets.

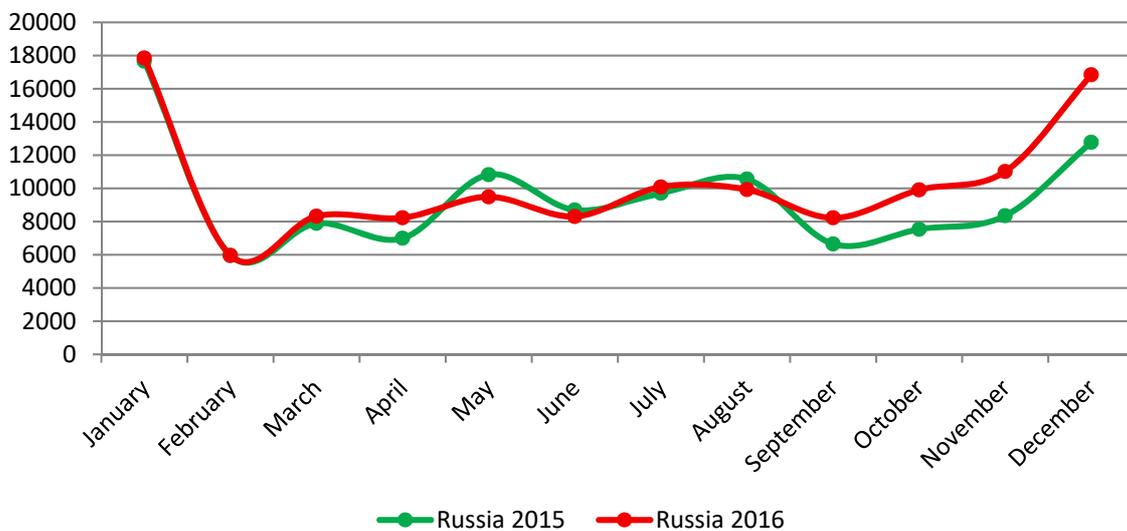
Finnish tourists tend to visit Tallinn in the summer months (Gini 2016=0.157, Gini 2015=0.158).

Visits of Finnish tourists to Tallinn by month



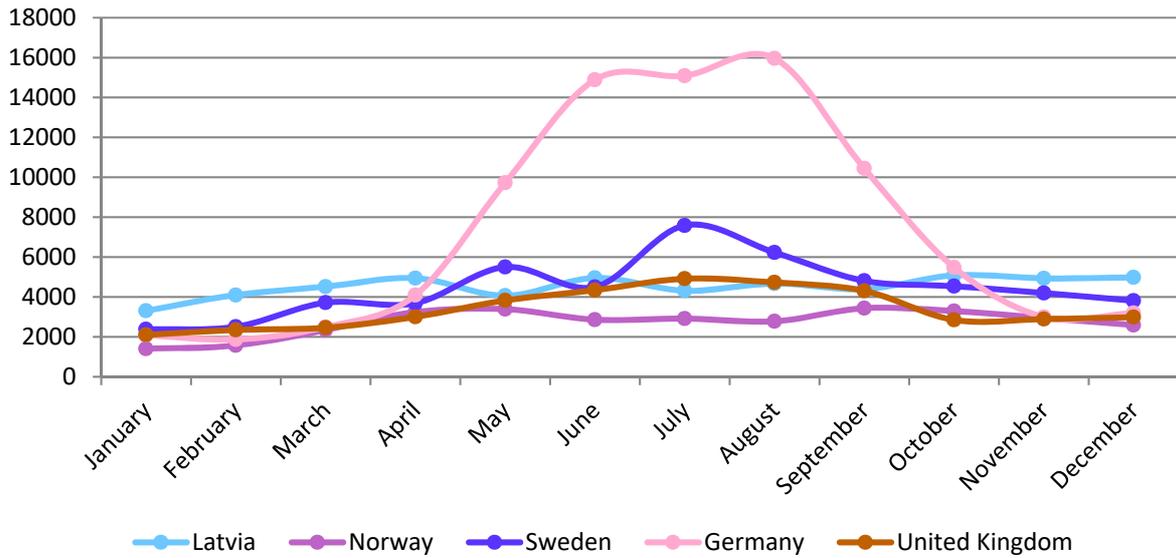
The visits of **tourists from Russia** to Tallinn were higher during January and December (Gini 2016=0.177, Gini 2015=0.185).

Visits of Russian tourists to Tallinn by month



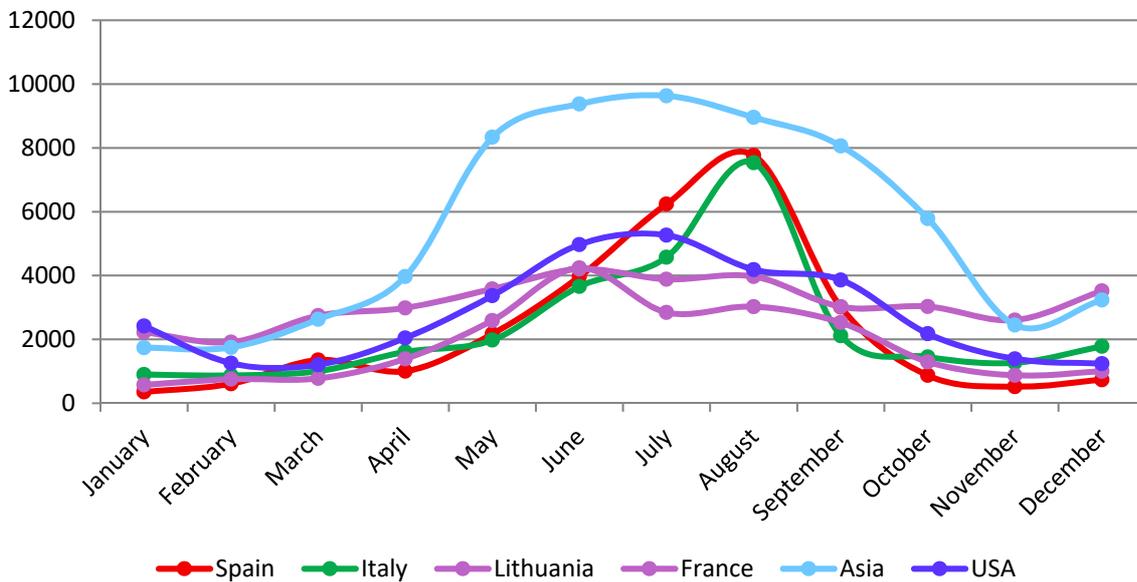
Visits by citizens of Latvia (Gini=0.065) and Norway (Gini=0.136) are distributed over the year more evenly. Visits from the UK (Gini=0.169) are higher in summer and those from Sweden (Gini=0.189) elevated in July. Visits by Germans (Gini=0.429) show stronger seasonality.

Seasonality on other main markets (2016)



Among visitors from other countries there is less seasonality in the visits by Lithuanians (Gini=0.134). Visits from other countries mostly fall to summer months.

Seasonality on other markets (2016)



Purposes of travel of visitors to Tallinn.

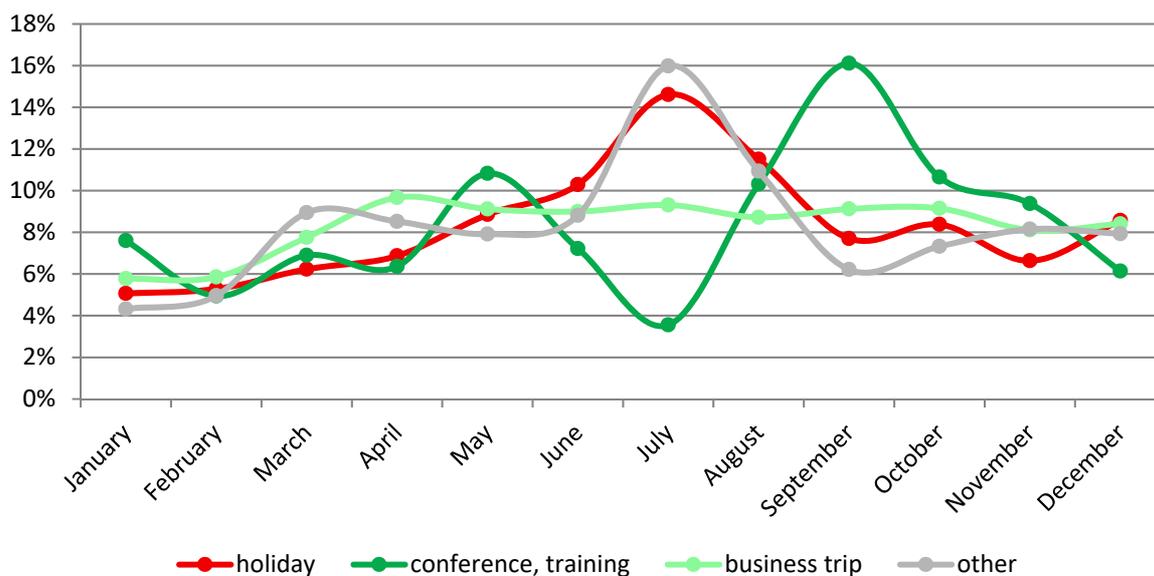
Tourists staying in accommodation establishments in Tallinn.

The following is an overview of the purposes of visiting Tallinn of tourists 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 2016 making up 72% of all purposes of travel (1,211,887 visits comprising an increase of 7% over holiday trips in 2015).

Business-related trips accounted for 26% of all visits (432,335 business-related trips, increase of 4% over the previous year). 362,291 or 22% of all visitors to Tallinn came here for business meetings (increase of 7%) and 70,044 or 4% main purpose of visit was for conferences or training (decrease of 13%). The share of tourists who travelled for other purposes made up 2% of all tourists (35,834 visits, increase of 11%).

Seasonality by purpose of travel (2016)



- 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)

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 April (10% of all business trips made during the year). The high season for conference trips was autumn: 37% of all trips for conference or training purposes were made from August to October, with most of them occurring in September, although, also in May there were more conference trips than on average months (11% of all trips for conference and training purposes during the year). Trips on other purposes peaked in July and August (27% of all trips on other purposes during the whole year).

Table 8. Domestic and international tourists in accommodation establishments in Tallinn by purpose of travel (2016)

Purpose of travel	Domestic and international tourists accommodated (2016)			
	Share	Number	Change 2015/2016	
			%	Number
Total	100%	1,680,056	+6%↑	+100,565
Holiday	72	1,211,887	+7%↑	+82,023
Conference, training	4%	70,044	-13%↓	-10,259
Business trip	22%	362,291	+7%↑	+25,189
Other trip	2%	35,834	+11%↑	+3,612

All tourists by purpose of travel (2016)

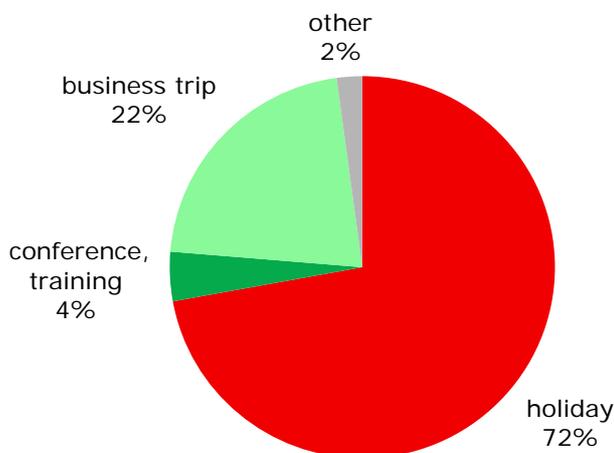


Table 9. International tourists in accommodation establishments in Tallinn by purpose of travel (2016)

Purpose of travel	International tourists accommodated (2016)			
	Share	Number	Change 2015/2016	
			%	Number
Total	100%	1,461,937	+6%↑	+80,362
Holiday	74%	1,073,835	+7%↑	+69,055
Conference, training	4%	60,098	-16%↓	-11,195
Business trip	20%	298,596	+7%↑	+19,984
Other trip	2%	29,408	+9%↑	+2,518

International tourists by purpose of travel (2016)

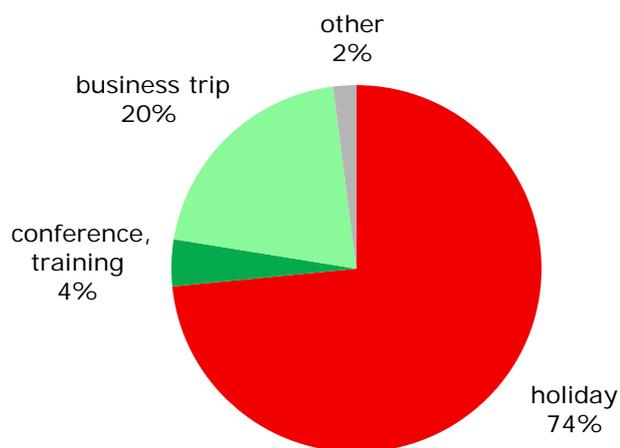
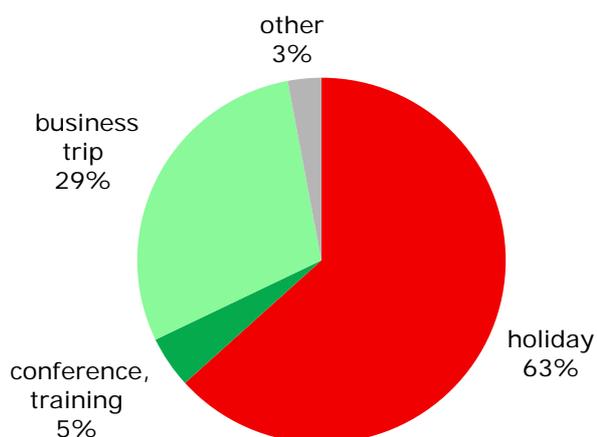


Table 10. Domestic tourists in accommodation establishments in Tallinn by purpose of travel (2016)

Purpose of travel	Domestic tourists accommodated (2016)			
	Share	Number	Change 2015/2016	
			%	Number
Total	100%	218,119	+10%↑	+20,203
Holiday	63%	138,052	+10%↑	+12,968
Conference, training	5%	9,946	+10%↑	+936
Business trip	29%	63,695	+9%↑	+5,205
Other trip	3%	6,426	+21%↑	+1,094

Domestic tourists by purpose of travel (2016)



Length of trip

The average length of a trip in 2016 was 1.78 nights, which is 1% more than the previous year.

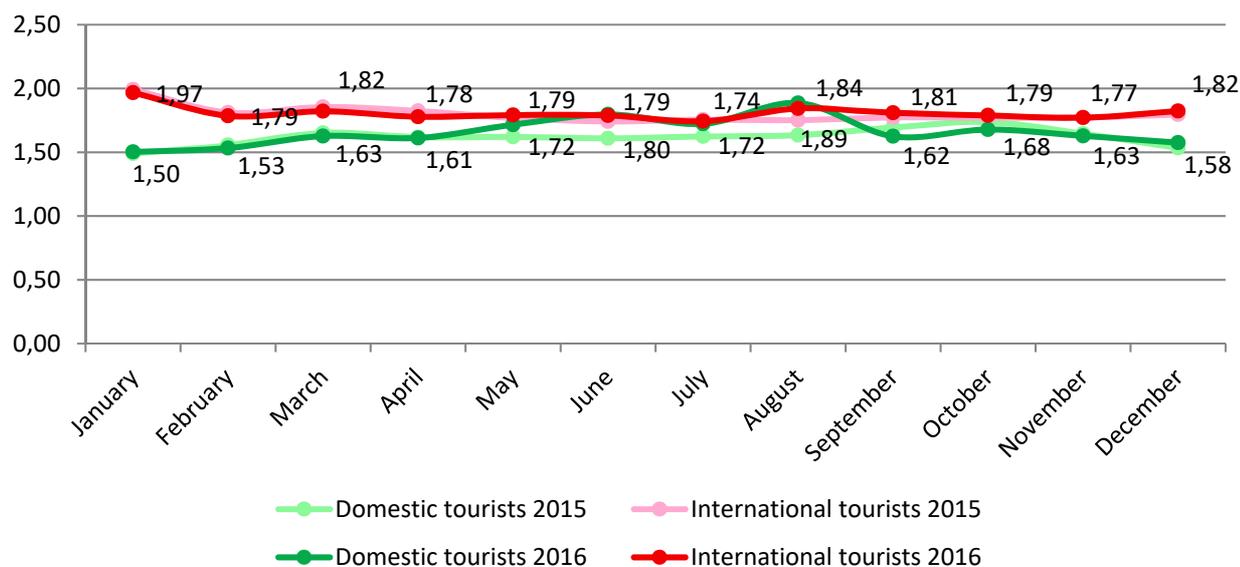
Domestic tourists spent an average of 1.66 nights, which is 2% longer compared to 2015.

International tourists spent an average of 1.80 nights, which is 1% longer compared to 2015.

The longest stays were by tourists from
Slovakia 3.18 nights
Romania 3.03 nights
Belgium 2.93 nights

The shortest stays were by tourists from
Finland 1.53 nights
Asia 1.59 nights
Latvia 1.64 nights

Average length of stay of tourists (nights) 2015-2016



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

Table 11. Length of trip by purpose of travel 2016

	Domestic tourists	International tourists	Total
Vacation	1.48	1.74	1.71
Business trips	1.88	1.89	1.89
incl. conference, training	1.50	1.85	1.80
incl. other business trip	1.94	1.90	1.90
Other	2.91	2.97	2.96
Total	1.66	1.80	1.78

Business and conference tourism

In 2016, more than half (59%) of all business travellers who stayed in accommodation establishments in Estonia did so in Tallinn.

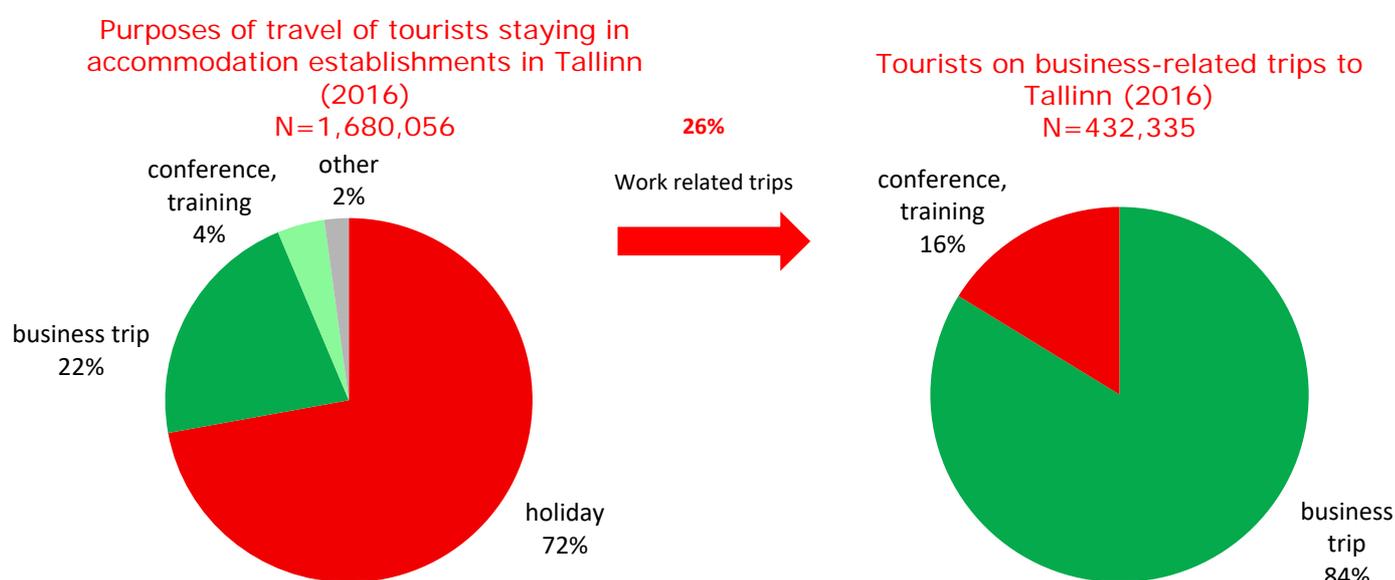
Of all the visitors who stayed in accommodation establishments in Estonia, 730,290 (22%) were on business trips, of whom 432,335 (59%) stayed in accommodation establishments in Tallinn.

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

	2012	2013	2014	2015	2016
Business trips to Estonia	665,528	689,222	676,983	698,261	730,290
Business trips to Tallinn	378,000	383,153	394,045	417,405	432,335
Share of those who stayed in Tallinn	57%	56%	58%	60%	59%

Source: Statistics Estonia (2017)

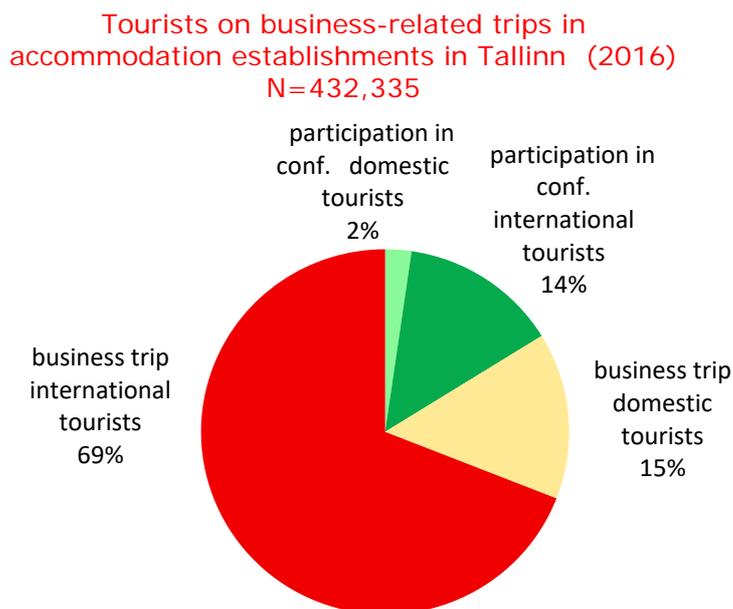
Of the business-related trips of tourists who stayed in accommodation establishments in Tallinn, 84% were business trips and 16% were conference trips. The share of all business-related trips to Tallinn increased by 4% year-on-year. Of all work-related trips, business trips have increased by 7% (25,189 business travellers more than the previous year) and the conference trips declined by 13% (-10,259 conference travellers less than the previous year).



In terms of **business-related travellers accommodated, 83% came from foreign countries and 17% were local.** Compared to 2015, the number of domestic business tourists increased by 9% (+6,141 tourists) and the number of international business tourists increased by 3% (+8,789 tourists).

Among accommodated **conference tourists, 86% (60,098 people) were international and 14% (9,946 people) were domestic.**

The majority (69%) of business-related trips were taken by international business tourists. Business trips by Estonians accounted for 15% of all business-related trips, conference trips by international tourists for 14% and conference trips/participation in seminars by Estonians for 2%.

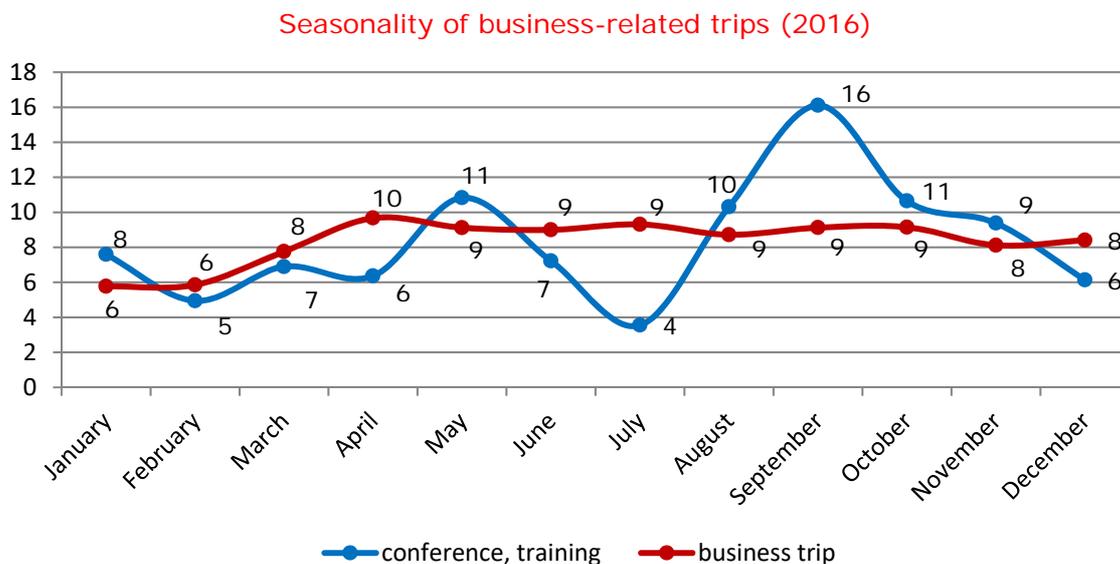


The number of accommodated conference tourists decreased by 13% (-10,259 people) compared to 2015, and the number of business tourists grew by 7% (25,189 people). The number of foreign conference tourists decreased by 16% (-11,195 people), while the number of local conference tourists grew by 10% (+936 people). The number of foreign conference tourists accommodated increased by 7% (+19,984 people), while the number of Estonian business travellers who stayed in accommodation establishments increased by 21% (+1,094 people).

The length of business trips in 2016 increased by 1% compared to the previous year. The average length of a business trip was 1.89 nights, incl. 1.80 nights for conference trips and 1.90 nights for business trips. By way of comparison, the average stay of holiday tourists in accommodation establishments in Tallinn was 1.71 nights.

The number of conference tourists accommodated was highest in September (11,287 or 16% of all conference tourists accommodated during the year) and above the average for the year in May (11%), August (10%), October (11%) and November (9%). From foreign countries, the number of tourists who came for conferences was highest in September (10,108 or 17% of all foreign tourists accommodated on conference purposes), while the number for domestic tourists was highest in September (1,179 or 12% of all domestic tourists accommodated on

conference purposes), October (1,168 or 12% of all domestic tourists accommodated on conference purposes) and December (1,181 or 12% of all domestic tourists accommodated on conference purposes).



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 since that date.

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

Table 13. Accommodation establishments, rooms and beds in 2015 and 2016

	Number of establishments		Rooms/cabins		Beds	
	2015	2016	2015	2016	2015	2016
January	113	117	7,003	6,964	15,228	14,538
February	114	120	6,891	6,969	14,313	14,557
March	116	122	6,935	6,965	14,419	14,494
April	117	121	6,931	6,896	14,422	14,430
May	123	129	6,986	6,981	14,541	14,519
June	124	138	7,048	7,272	14,683	15,121
July	126	141	7,030	7,511	14,674	15,616
August	125	135	7,006	7,342	14,669	15,280
September	123	136	6,949	7,406	14,463	15,411
October	119	130	6,930	7,360	14,347	15,195
November	114	126	6,830	7,348	14,169	15,128
December	116	125	6,904	7,297	14,361	15,037

Source: Statistics Estonia (2017)

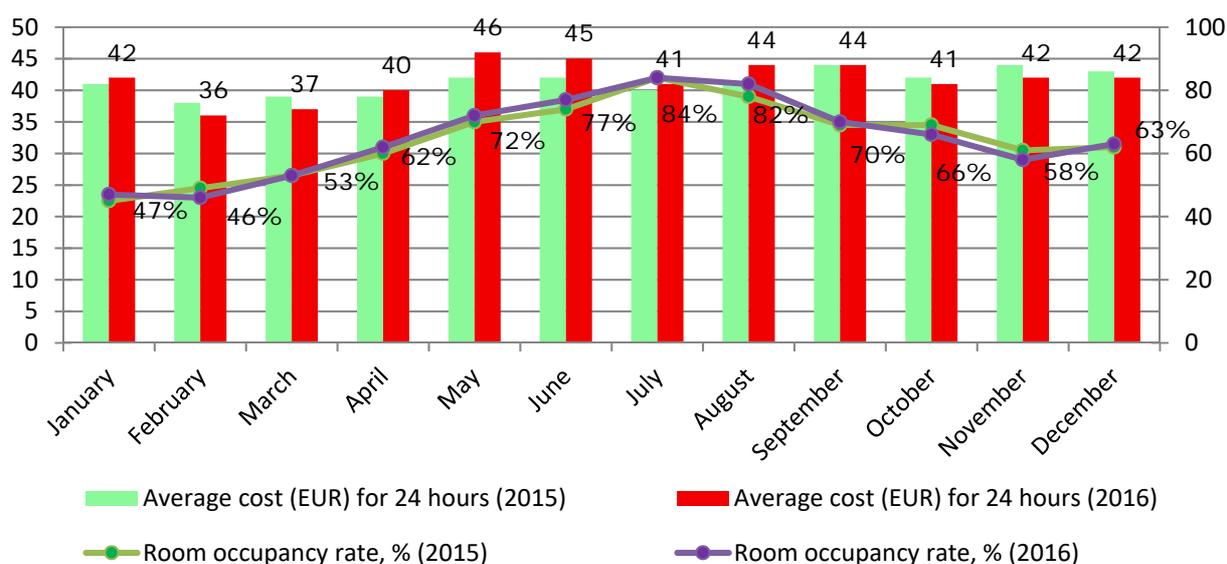
The number of providers of accommodation services tends to vary seasonally.

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 2016 was 65%. The occupancy rate varies by month: it was lowest in February, when 46% of the rooms on offer were occupied, and highest in July (84%).

The average price per night was 42 euros, which is 1% higher than in 2015. The average price for accommodation was highest in May (46 euros) and lowest in February (36 euros).

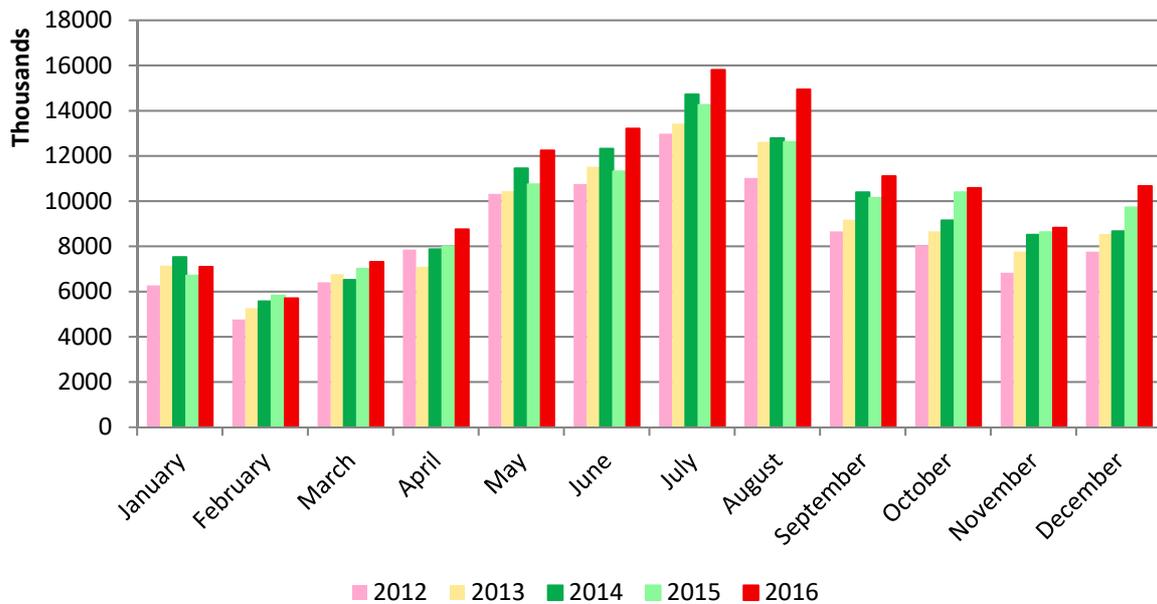
Room occupancy rate in Tallinn's accommodation establishments and the average cost for 24 hours (2015-2016)



Accommodation establishments in Tallinn earned a total of 126.2 million euros from sales of accommodation services in 2016 (an increase of 9% over 2015).

	2015	2016	Change %	Change number
Income from sales of accommodation services	115,323,741	126,208,722	9	10,884,981

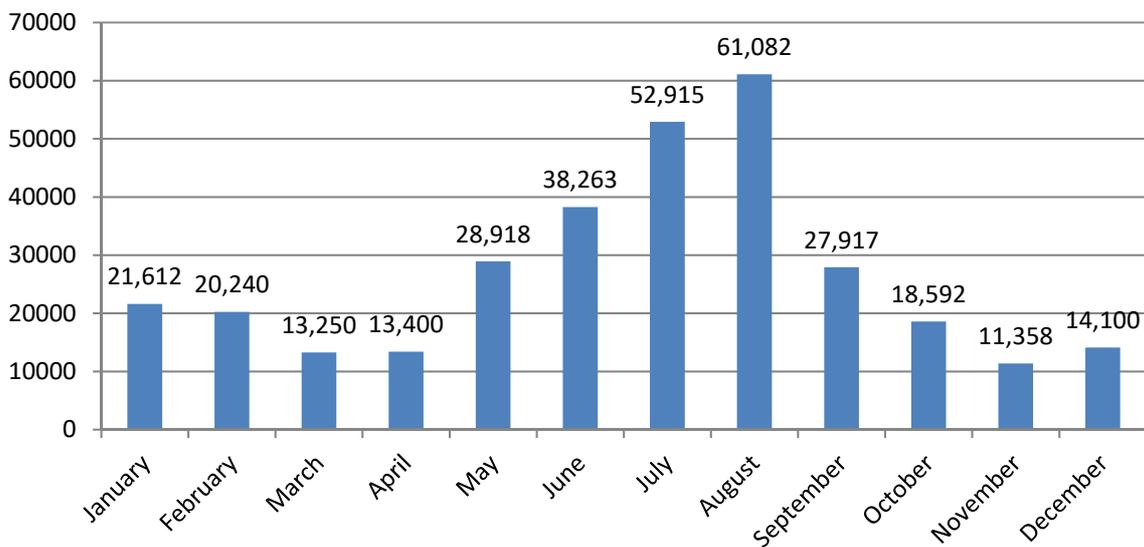
Income from sale of accommodation services 2012-2016



Visits to Tourist Information Centre and tourist information channels

More than 300,000 people paid a visit to the Tourist Information Centre in 2016.

Visits to Tallinn Tourist Information Centre



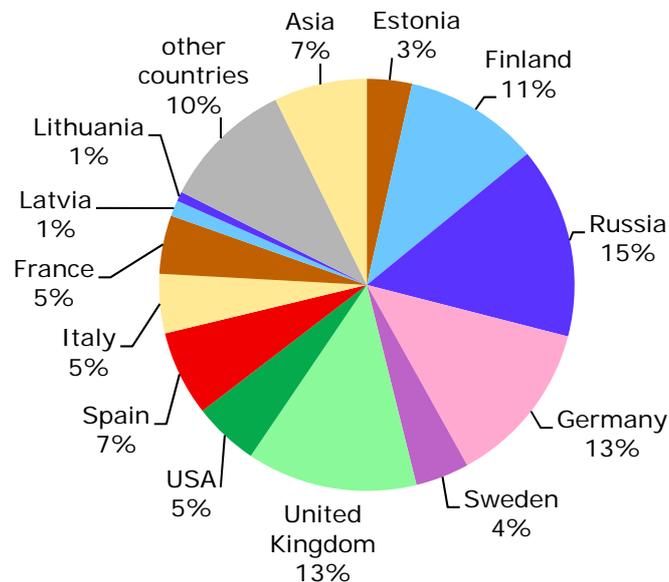
Most of the visitors found the information they needed on their own from the materials displayed while 17,480 visitors approached staff for information (during summer months there is a person helping visitors in the hall, as he/she does not use computer those questions are not included in the statistics). 96% of the registered queries were foreigners and 4% were locals.

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 2016 came from 96 different countries.

The majority of queries were made by visitors from Russia (2,682 persons which made up 15% of all queries) followed by visitors from the United Kingdom (2,375 persons or 13,3% of all queries) and visitors from Germany (2,315 persons which made up 13% of all registered queries).

Queries by country (2016)



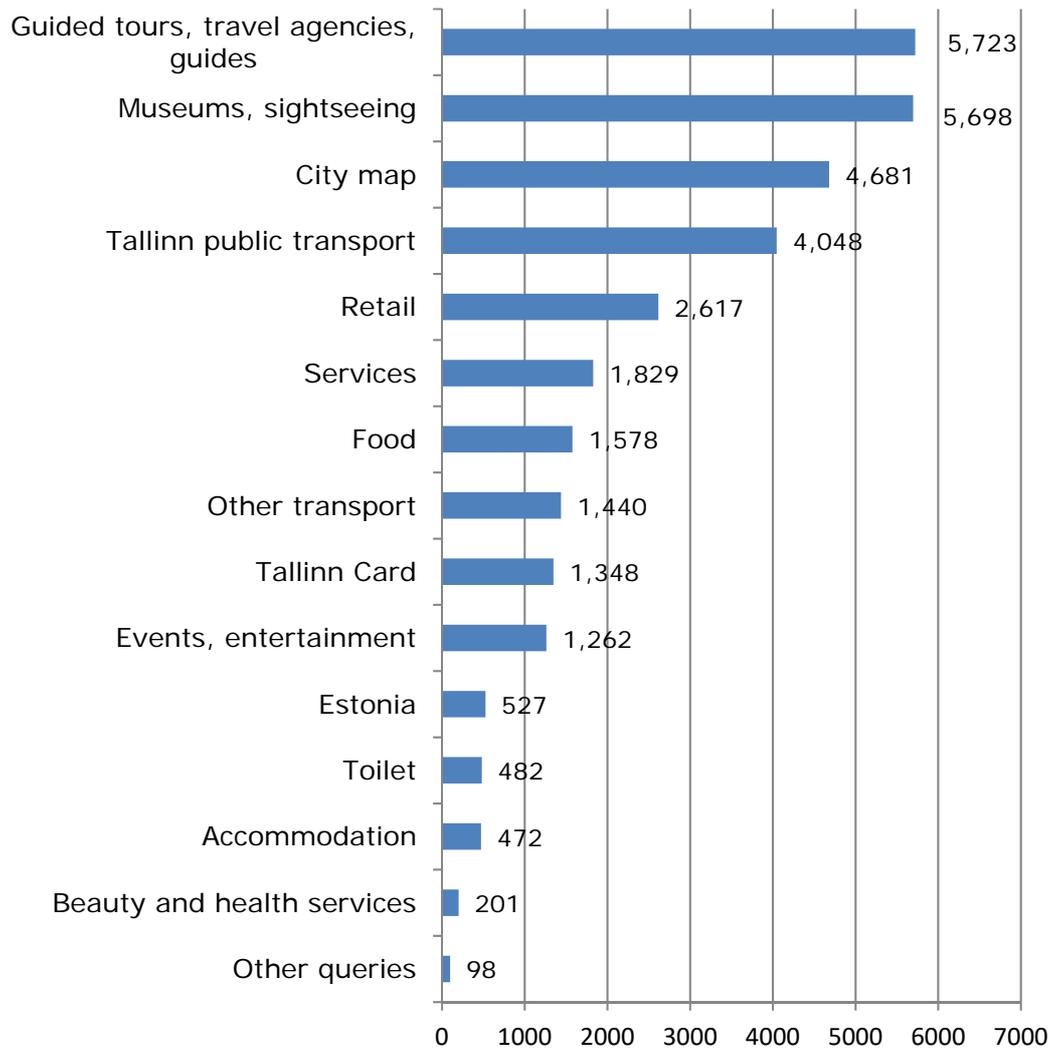
Visitors to the centre are mostly interested in sights, museums and guided tours; they also seek maps of the city. Information about public transport is sought as well.

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.

The most questions asked were about tours, travel agencies and tour guides (5,723 queries) and about museums and sights (5,698 queries).

Questions marked as "other" included: history and architecture, audioguides, parking, car and bus rental, the use of bicycle card and bicycle rentals. Also questions about baggage hold and currency exchange were asked. Some visitors asked about accessibility and rental of wheelchairs, cultural centers as well as inquired about holidays in Estonia. Tourism Information Centre also answered questions about the rental of apartments, study possibilities in Estonia, employment opportunities etc.

Queries at Tallinn Tourist Information Centre (2016)

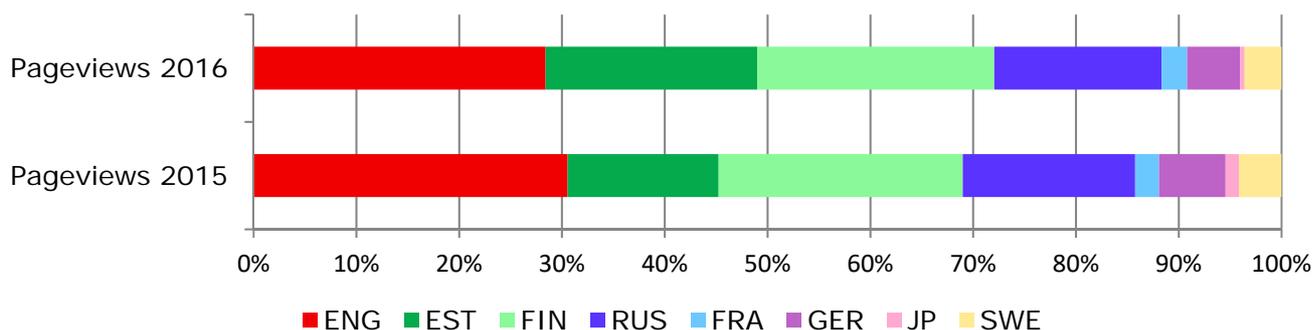


Visits to Tallinn tourism website in 2016

Tallinn tourism website visittallinn.ee received 5.3 million pageviews in 2016, which is 6% more than the year before. On average, the duration of the visit was 2:20 minutes and 2.49 pages were viewed by session.

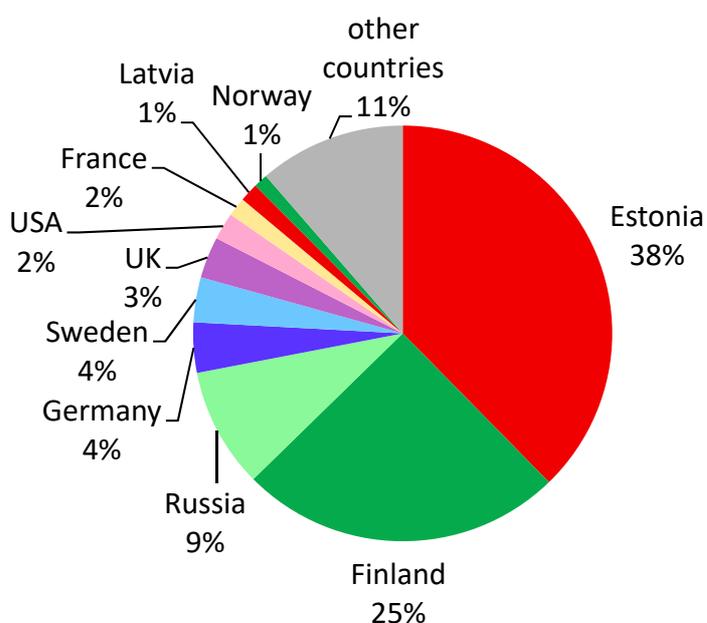
Most pageviews - 1.7 million - were made to the English section followed by the section in Finnish (1.4 million pageviews). The section in Estonian language received 1.2 million pageviews and the one in Russian received a total of 1 million pageviews.

Pageviews on visittallinn.ee by language environment



The most visits to the website were made while in Estonia (32% of all visits), followed by Finland (25%) and Russia (9%).

Visits to Tallinn tourist website by country

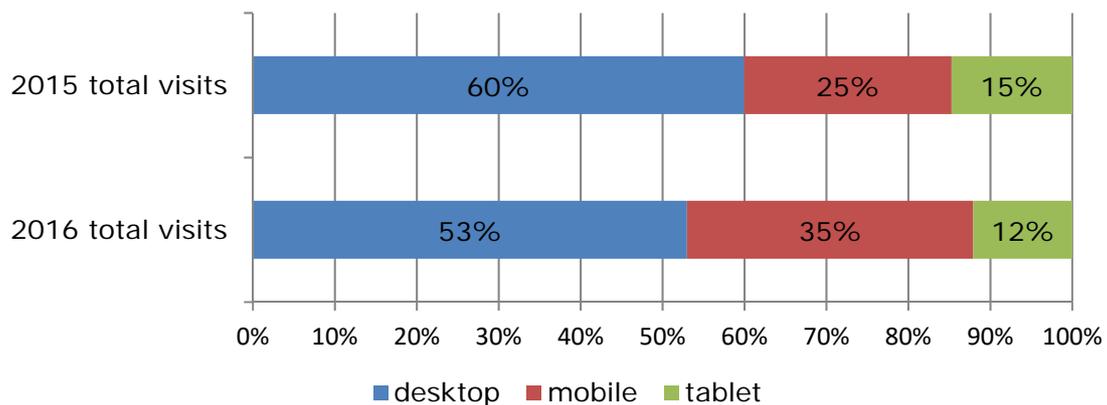


Visits to Tallinn tourism web by country in 2015 and 2016.

Country	2016		2015	
	Visits	Share	Visits	Share
Estonia	592,023	38%	472,132	33%
Finland	391,692	25%	395,856	28%
Russia	146,380	9%	120,157	8%
Germany	61,329	4%	66,800	5%
Sweden	55,003	3%	57,056	4%
United Kingdom	50,522	3%	47,494	3%
USA	33,067	2%	33,730	2%
France	23,167	1%	18,598	1%
Latvia	22,693	1%	22,609	2%
Norway	16,915	1%	16,380	1%
Japan	7,170	0%	20,860	1%
Other countries	177,871	12%	163,101	11%
Total	1,577,832	100%	1,434,773	100%

Visits by device

Visits using a mobile device increased and visits using desktop computer and tablet decreased.



Sessions by device 2015 and 2016

	2016		2015	
	Sessions	Share	Sessions	Share
desktop	835,989	53%	864,276	60%
mobile	551,211	35%	364,832	25%
tablet	190,632	12%	212,209	15%
Total	1,577,832	100%	1,441,317	100%

Arriving in Tallinn

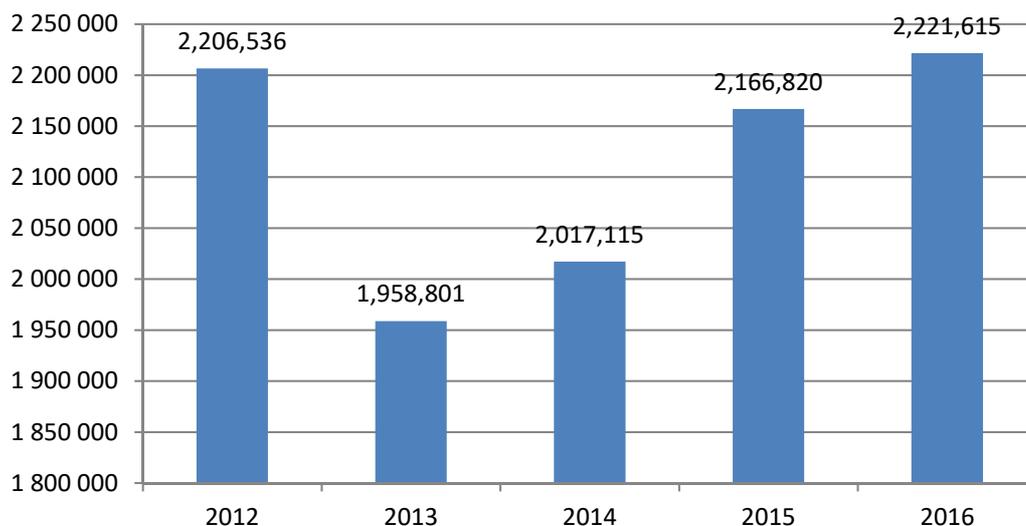
Visitors arrived in Tallinn by ship and plane as well as overland by car, bus or train.

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

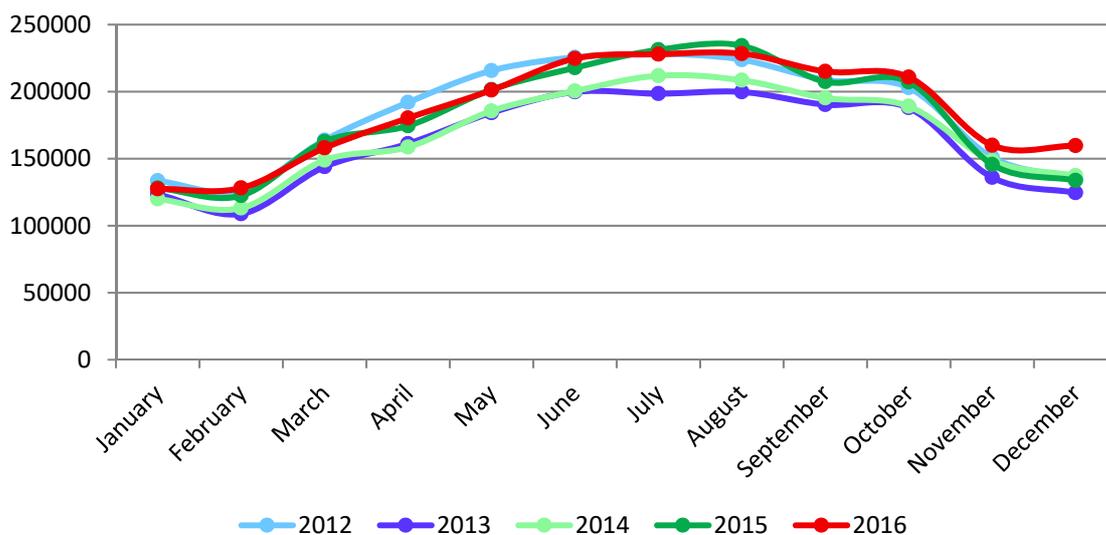
In 2016 more than 2,2 million passengers passed through Tallinn Airport, which is an increase of 2,5% compared to the previous year (Tallinn Airport, 2017).

Passengers at Tallinn Airport (2012-2016)



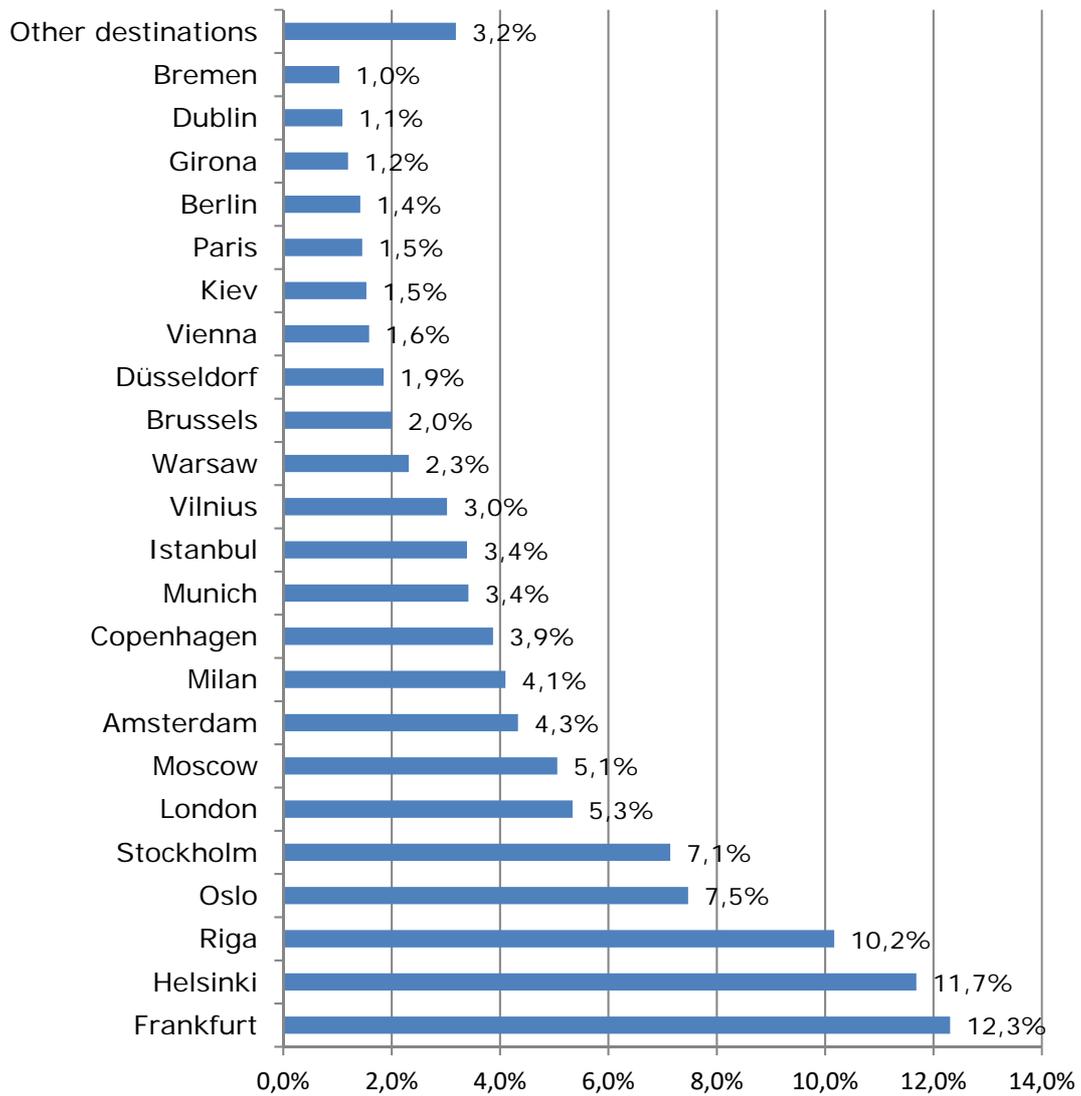
Source: Tallinn Airport (2017)

Passengers at Tallinn Airport (2012-2016)



Source: Tallinn Airport (2017)

Share of flight passengers by route (2016)

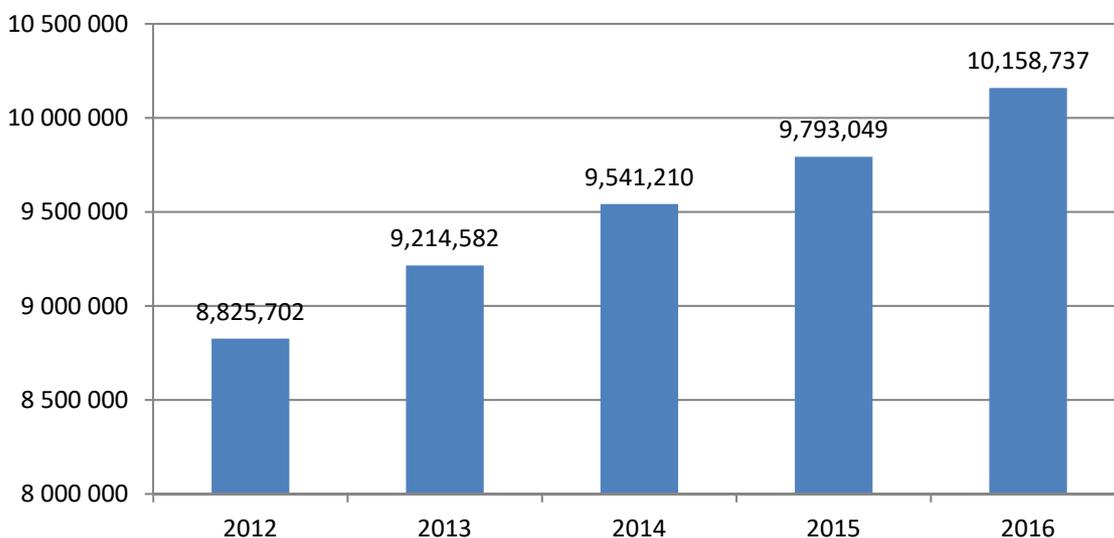


Source: Tallinn Airport (2017)

Number of passengers at Tallinn's Old City Harbour

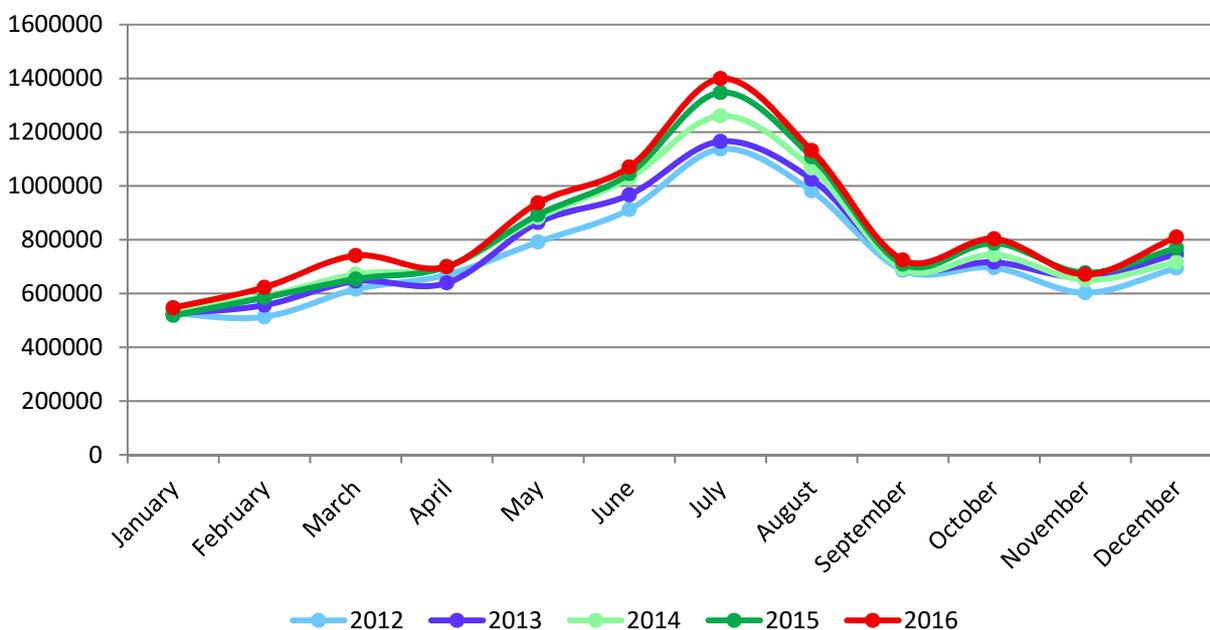
In 2016, 10,158,737 passengers passed through the Old City Harbour, which represents a 4% increase compared to the year before.

Passengers at Tallinn's Old City Harbour (2012-2016)



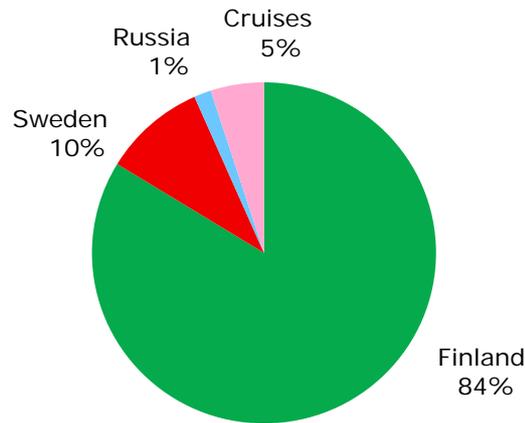
Source: Port of Tallinn (2017)

Passengers at Tallinn's Old City Harbour by month (2012-2016)



Source: Port of Tallinn (2017)

Share of ship passengers by route (2016)



Source: Port of Tallinn (2017)

Conclusions

Approximately 4.25 million foreign residents visited Tallinn in 2016.

Of all the foreign visitors to Tallinn, 1.8 million stayed overnight (42%). Of those, 83% stayed in accommodation establishments included in the sample of Statistics Estonia and 17% stayed with other accommodation providers or with friends and relatives. 2.5 million foreign visitors were same-day visitors, approximately 0.5 million of them arriving on cruise ships.

A total of 1.7 million tourists stayed in accommodation establishments in Tallinn, which is an increase of 6% compared to 2015. 87% of all visitors accommodated in Tallinn were international tourists and 13% were domestic tourists. All in all, tourists spent 3 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, 22% came for business meetings, 4% were participating in conferences or training sessions and 2% were in town for other reasons.

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 1.78 nights).

Accommodation establishments earned 126 million euros from sales of accommodation services in 2016 (an increase of 9%).

Interest in the Tallinn Tourist Information Centre has increased. The centre was visited by more than 300,000 people during the year, while the Tallinn tourism website had more than 5.3 million views.

Table 15. Tourists accommodated in Tallinn (2016), number of nights spent and length of trip

Country of origin	Accommodated (2016)			Overnight stays (2016)			Length of trip (nights)
	number	Change 2015/2016		number	Change 2015/2016		
		%	number		%	number	
Total	1,680,056	6	100,565	2,997,156	7	206,163	1.78
International tourists	1,461,937	6	80,362	2,635,329	7	164,903	1.80
Domestic tourists	218,119	10	20,203	361,827	13	41,260	1.66
Africa	1,831	3	47	4,630	7	314	2.53
incl. South Africa	318	-23	-96	868	-20	-217	2.73
Albania	203	46	64	422	46	132	2.08
Asia	65,913	14	8,114	104,547	14	12,911	1.59
incl. China	12,326	18	1,878	21,731	24	4,207	1.76
incl. Japan	22,953	5	1,084	37,113	8	2,756	1.62
incl. South Korea	11,438	12	1,257	14,030	16	1,941	1.23
Australia, Oceania	7,105	15	927	14,798	10	1,305	2.08
incl. Australia	5,982	17	854	12,548	9	1,055	2.10
incl. New Zealand	0	0	0	0	0	0	0.00
Austria	7,189	20	1,191	16,106	14	2,019	2.24
Belgium	7,719	27	1,633	22,590	85	10,379	2.93
Bulgaria	1,565	0	0	3,691	-2	-71	2.36
Canada	3,768	1	44	8,708	3	250	2.31
Countries in Central and South America	7,463	8	546	16,834	23	3,173	2.26
incl. Brazil	2,895	-13	-451	6,839	15	908	2.36
Croatia	1,072	22	191	3,028	29	678	2.82
Cyprus	523	50	174	1,112	10	99	2.13
Czech Republic	4,610	20	781	11,518	2	213	2.50
Denmark	12,149	4	449	22,793	1	304	1.88
Finland	690,044	5	32,053	1,054,689	7	67,859	1.53
France	21,902	17	3,123	49,108	11	4,999	2.24
Germany	88,330	7	6,076	195,119	10	17,327	2.21
Greece	2,500	-4	-115	5,854	7	388	2.34
Hungary	3,393	16	456	7,644	-4	-352	2.25
Iceland	910	5	45	2,013	-13	-292	2.21
Ireland	3,267	20	554	7,630	25	1,522	2.34
Italy	28,746	17	4,171	66,067	15	8,642	2.30
Latvia	54,281	4	2,028	89,152	7	6,096	1.64
Lithuania	37,686	7	2,456	73,518	25	14,513	1.95
Luxembourg	784	25	156	1,684	36	449	2.15
Malta	499	31	118	1,041	8	74	2.09
Norway	32,796	2	572	76,538	6	4,017	2.33
Poland	20,080	23	3,716	41,554	28	9,183	2.07
Portugal	2,716	-10	-304	6,400	-11	-820	2.36
Romania	2,232	3	64	6,770	-1	-97	3.03

Russia	124,153	9	10,553	241,614	8	17,031	1.95
Slovakia	1,686	-2	-29	5,364	-5	-299	3.18
Slovenia	1,334	-3	-40	2,952	1	26	2.21
Spain	28,607	16	3,993	67,199	-9	-6,998	2.35
Sweden	53,481	7	3,349	88,615	10	7,726	1.66
Switzerland	9,531	4	369	19,118	3	613	2.01
The Netherlands	14,567	18	2,232	32,484	19	5,147	2.23
Turkey	6,469	9	540	15,071	9	1,280	2.33
UK	40,757	0	53	89,291	-2	-1,687	2.19
Ukraine	10,136	-4	-418	21,477	-7	-1,720	2.12
USA	33,383	-17	-6,697	81,633	-19	-19,196	2.45
Other European countries	9,129	-21	-2,418	22,006	-11	-2,835	2.41
Other countries	17,428	-3	-455	32,947	2	601	1.89

Table 16. International tourists accommodated in Tallinn and their share by country of all international tourists (2016)

Country of origin	International tourists accommodated					Share of international tourists (2016)
	2015	Change 2015/2016		Change 2014/2016		
		%	number	%	number	
International tourists total	1,461,937	6	80,362	3,54	49,936	100%
Africa	1,831	3	47	9.18	154	0.13%
incl. South Africa	318	-23	-96	-20.30	-81	0.02%
Albania	203	46	64	23.03	38	0.01%
Asia	65,913	14	8,114	46.80	21,014	4.51%
incl. China	12,326	18	1,878	18.19	1,897	0.84%
incl. Japan	22,953	5	1,084	40.22	6,584	1.57%
incl. South Korea	11,438	12	1,257	77.80	5,005	0.78%
Australia, Oceania	7,105	15	927	-7.63	-587	0.49%
incl. Australia	5,982	17	854	-11.21	-755	0.41%
incl. New Zealand	0	0	0	0	0	0.00%
Austria	7,189	20	1,191	15.62	971	0.49%
Belgium	7,719	27	1,633	22.84	1,435	0.53%
Bulgaria	1,565	0	0	11.47	161	0.11%
Canada	3,768	1	44	-8.41	-346	0.26%
Countries in Central and South America	7,463	8	546	23.58	1,424	0.51%
incl. Brazil	2,895	-13	-451	20.42	491	0.20%
Croatia	1,072	22	191	59.05	398	0.07%
Cyprus	523	50	174	37.27	142	0.04%
Czech Republic	4,610	20	781	8.27	352	0.32%
Denmark	12,149	4	449	33.51	3,049	0.83%
Finland	690,044	5	32,053	3.92	25,999	47.20%
France	21,902	17	3,123	17.18	3,211	1.50%
Germany	88,330	7	6,076	10.90	8,681	6.04%
Greece	2,500	-4	-115	8.37	193	0.17%
Hungary	3,393	16	456	31.00	803	0.23%
Iceland	910	5	45	34.22	232	0.06%
Ireland	3,267	20	554	35.73	860	0.22%
Italy	28,746	17	4,171	28.21	6,325	1.97%

Latvia	54,281	4	2,028	25.20	10,926	3.71%
Lithuania	37,686	7	2,456	11.71	3,951	2.58%
Luxembourg	784	25	156	9.04	65	0.05%
Malta	499	31	118	82.78	226	0.03%
Norway	32,796	2	572	7.60	2,316	2.24%
Poland	20,080	23	3,716	8.42	1,559	1.37%
Portugal	2,716	-10	-304	-17.32	-569	0.19%
Romania	2,232	3	64	9.57	195	0.15%
Russia	124,153	9	10,553	-29.88	-52,901	8.49%
Slovakia	1,686	-2	-29	26.01	348	0.12%
Slovenia	1,334	-3	-40	-9.99	-148	0.09%
Spain	28,607	16	3,993	25.00	5,721	1.96%
Sweden	53,481	7	3,349	7.18	3,584	3.66%
Switzerland	9,531	4	369	31.34	2,274	0.65%
The Netherlands	14,567	18	2,232	30.47	3,402	1.00%
Turkey	6,469	9	540	13.75	782	0.44%
UK	40,757	0	53	3.93	1,543	2.79%
Ukraine	10,136	-4	-418	2.64	261	0.69%
USA	33,383	-17	-6,697	20.09	5,585	2.28%
Other European countries	9,129	-21	-2,418	-74.25	-26,317	0.62%
Other countries	17,428	-3	-455	262.78	12,624	1.19%

Table 17: Overnight stays by international tourists accommodated in Tallinn and their share by country of all international tourists (2016)

Country of origin	Overnight stays by accommodated international tourists					Share of international tourists (2016)
	2016	Change 2015/2016		Change 2014/2016		
		%	number	%	number	
Overnight stays by international tourists total	2,635,329	7	164,903	3,84	97,489	100%
Africa	4,630	7	314	11.78	488	0.18%
incl. South Africa	868	-20	-217	3.83	32	0.03%
Albania	422	46	132	3.18	13	0.02%
Asia	104,547	14	12,911	38.42	29,019	3.97%
incl. China	21,731	24	4,207	28.37	4,803	0.82%
incl. Japan	37,113	8	2,756	32.32	9,066	1.41%
incl. South Korea	14,030	16	1,941	48.56	4,586	0.53%
Australia, Oceania	14,798	10	1,305	-14.98	-2,608	0.56%
incl. Australia	12,548	9	1,055	-18.02	-2,758	0.48%
incl. New Zealand	0	0	0	0	0	0.00%
Austria	16,106	14	2,019	14.22	2,005	0.61%
Belgium	22,590	85	10,379	65.79	8,964	0.86%
Bulgaria	3,691	-2	-71	10.18	341	0.14%
Canada	8,708	3	250	-14.62	-1,491	0.33%
Countries in Central and South America	16,834	23	3,173	29.16	3,801	0.64%
incl. Brazil	6,839	15	908	41.77	2,015	0.26%
Croatia	3,028	29	678	86.22	1,402	0.11%
Cyprus	1,112	10	99	19.96	185	0.04%
Czech Republic	11,518	2	213	5.81	632	0.44%

Denmark	22,793	1	304	19.81	3,768	0.86%
Finland	1,054,689	7	67,859	6.57	65,053	40.02%
France	49,108	11	4,999	12.20	5,341	1.86%
Germany	195,119	10	17,327	7.57	13,724	7.40%
Greece	5,854	7	388	1.00	58	0.22%
Hungary	7,644	-4	-352	6.09	439	0.29%
Iceland	2,013	-13	-292	19.89	334	0.08%
Ireland	7,630	25	1,522	35.77	2,010	0.29%
Italy	66,067	15	8,642	24.23	12,884	2.51%
Latvia	89,152	7	6,096	28.13	19,573	3.38%
Lithuania	73,518	25	14,513	20.86	12,691	2.79%
Luxembourg	1,684	36	449	5.45	87	0.06%
Malta	1,041	8	74	19.11	167	0.04%
Norway	76,538	6	4,017	7.66	5,448	2.90%
Poland	41,554	28	9,183	13.99	5,099	1.58%
Portugal	6,400	-11	-820	-10.89	-782	0.24%
Romania	6,770	-1	-97	8.84	550	0.26%
Russia	241,614	8	17,031	-33.43	-121,352	9.17%
Slovakia	5,364	-5	-299	19.15	862	0.20%
Slovenia	2,952	1	26	-10.95	-363	0.11%
Spain	67,199	-9	-6,998	21.64	11,957	2.55%
Sweden	88,615	10	7,726	6.76	5,610	3.36%
Switzerland	19,118	3	613	25.70	3,909	0.73%
The Netherlands	32,484	19	5,147	29.11	7,325	1.23%
Turkey	15,071	9	1,280	19.24	2,432	0.57%
UK	89,291	-2	-1,687	1.81	1,585	3.39%
Ukraine	21,477	-7	-1,720	9.46	1,857	0.81%
USA	81,633	-19	-19,196	26.13	16,913	3.10%
Other European countries	22,006	-11	-2,835	-67.72	-46,156	0.84%
Other countries	32,947	2	601	256.88	23,715	1.25%

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