



Overview of Tourism Trends in Tallinn in 2017

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 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 and the tourism-related information platform TourMis publications, Tallinn Airport and the Port of Tallinn.

Contents

Introduction.....	1
A brief overview of tourism in Tallinn in 2017	3
Visits to Estonia and Tallinn by foreign residents	4
Overnight stays in accommodation establishments in Tallinn.....	7
Multi-day visits to Tallinn vs overnight stays by foreign visitors in accommodation establishments in Tallinn	9
International tourists in Tallinn – the numbers and countries of origin	12
The purposes of trips to Tallinn.....	17
The seasonality of tourism in Tallinn and the lengths of stay in Tallinn	19
The seasonality of tourism in Tallinn.....	19
The length of stay of tourists who spent the night in accommodation establishments.....	22
Accommodation establishments in Tallinn	23
Visits to Tallinn Tourist Information Centre.....	25
Visits to tourism website VisitTallinn.ee	26
Income from tourism in Tallinn	29
Passengers at Tallinn Airport.....	29
Passengers at Tallinn’s Old City Harbour.....	30
Summary	32
Sources	33
Table Tourists accommodated in Tallinn 2017*	34

A brief overview of tourism in Tallinn in 2017

Half of the tourists¹ who stayed in accommodation establishments in Estonia spent the night in Tallinn

A total of 3,544,932 tourists stayed in Estonian accommodation establishments in 2017, of whom 49% (1,728,429 tourists) spent the night in Tallinn.

Number of tourists in Tallinn:

1,728,429 (+3%)²

Number of nights tourists spent in Tallinn: 3,099,102 (+3%)

Important target markets developed in different directions

Of all the nights spent in accommodation establishments in Tallinn, 87% were by foreign tourists.

Finland: 996,513 nights (-6%)
 Russia: 270,109 nights (+12%)
 Germany: 190,953 nights (-2%)
 United Kingdom: 109,871 nights (+23%)
 Latvia: 90,519 nights (+2%)
 Spain: 89,951 nights (+34%)
 Sweden: 83,711 nights (-6%)
 USA: 73,486 nights (-10%)
 Norway: 66,583 nights (-13%)
 Italy: 65,227 nights (-1%)

Most tourists came for leisure purposes

Of all the visits to the city, 69% were for leisure, 23% were for business, 5% were for participation in conferences, and 3% for other reasons.

Visits were short, seasonality decreased slightly

The average length of stay of tourists in Tallinn was 1.79 nights. Half of the visits

(51%) were made from May to September and the largest amount of city visitors came in July.

The number of accommodation establishments increased, prices of accommodation services rose

In 2017, a total of 146 establishments offered accommodation services in Tallinn, about 7,500 rooms and 15,700 beds were for sale. The average rate of room occupancy was 65%. The average price per person was 46 euros (+10%).

Income from tourism in Tallinn increased

Foreign visitors spent an estimated 960 million euros (+3%). Accommodation establishments in Tallinn earned 143 million euros (+14%) from sales of accommodation services.

Number of air and ship passengers increased

Tallinn Airport served a total of 2.64 million passengers (+19%). Regular flights were made to 34 destinations over the year. 10.5 million passengers (+3%) passed through Tallinn's Old City Harbour, 83% of them travelled on the Finland route, 10% on the Sweden route, 1% on the Russia route, and 6% were cruise passengers.

Demand for tourist information grew

A total of 328,600 visitors (+9%) were served in Tallinn Tourist Information Centre. The largest amount of visitors came from Russia, Germany and United Kingdom. Tourist information about Tallinn was given out on tourist websites and VisitTallinn social media accounts. The tourism website received a total of 5,57 million pageviews (+4%).

¹ A Tourist or a visitor who spends the night is a person who travels out of their usual environment and spends at least one night in the place of destination.

² In comparison with accommodation statistics of 2016

Visits to Estonia and Tallinn by foreign residents

According to mobile positioning data made available by the Bank of Estonia, 6.12 million visits³ were made to Estonia in 2017 by foreign residents, which is an increase by 3% compared to the previous year. More than half of the foreign visitors (53%) stayed overnight and the average length of stay of multi-day visits was 4.2 days. Two thirds of foreign tourists who spent the night in Estonia stayed in accommodation establishments. A total of 2.89 million one-day visits were made, one fifth of which were from cruise trips.

Estonia has four larger target markets: **Finland, Russia, Latvia and Germany**. In 2017, two thirds of all foreign visitors came from these countries. Residents from Finland accounted for 35% of all visits (a total of 2.16 million visits, which is a 5% decrease). Tourists from Russia made almost 900,000 visits to Estonia, which is 4% more than in 2016, and which constituted 15% of all visits. Visits from Latvia made up 10% (a total of 640,000 visits, an increase of 11%) and visits from Germany made up 7% (a total of 445,000 visits, an increase of 7%). Visits made by residents from other countries of the European Union increased by 10%. There was an above the average increase in the number of visits from United Kingdom (20%) and Belgium (54%), which was partly related to the Estonian Presidency of the Council of the European Union.

Of all the visits to Estonia made by foreign residents, **74% were visits to Tallinn** (Positium LBS 2018). According to mobile positioning data, foreign residents made 4,557,790 visits to Tallinn, which was an increase of 7% compared to 2016.

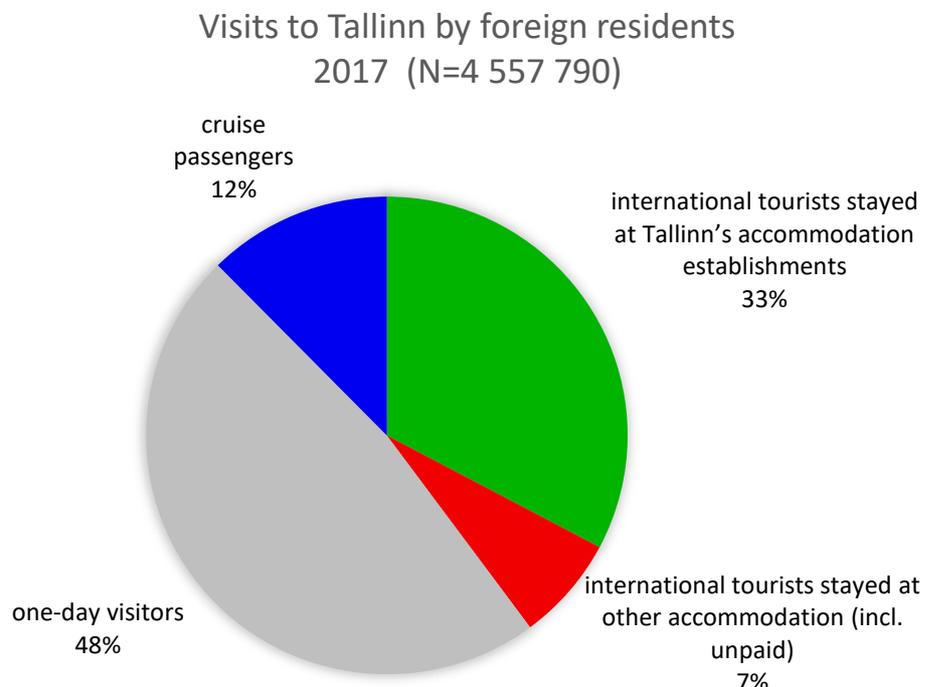
Same-day visits (60%):

2,741,241 (+10%)

Multi-day visits (40%):

1,816,549 (+3%).

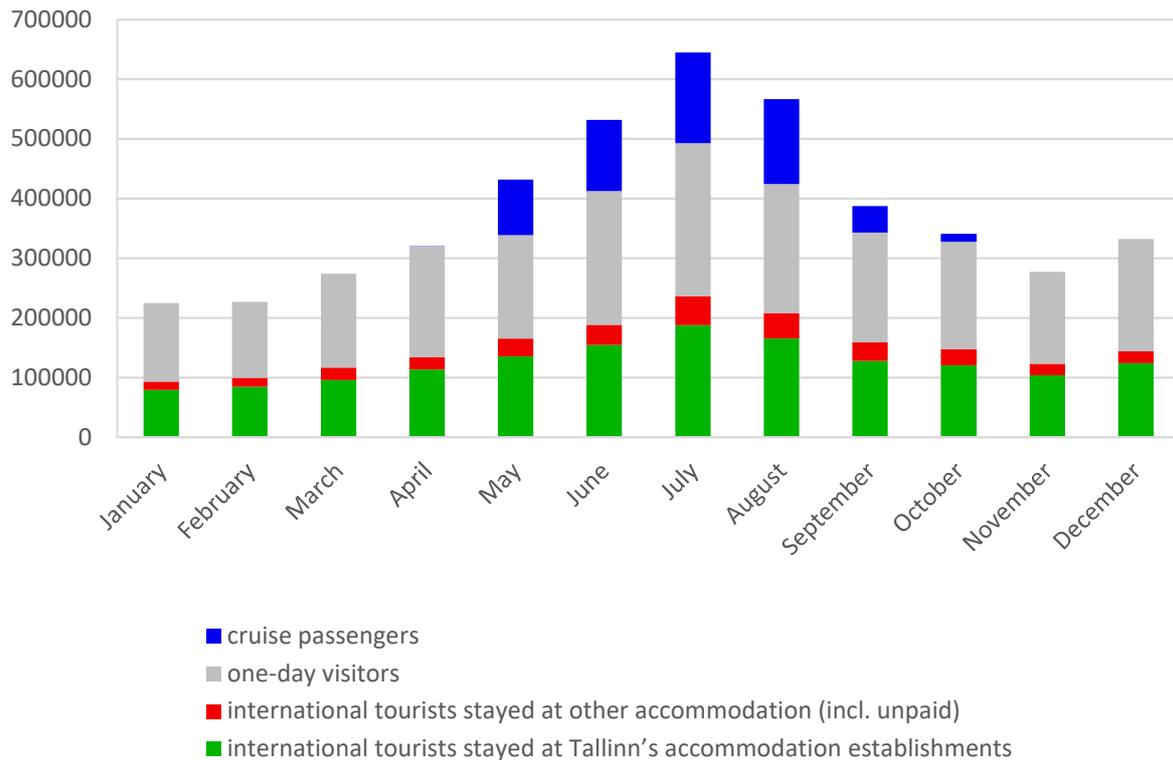
Multi-day visitors spent an average of 2.8 days in Tallinn.



Positium LBS, Statistics Estonia, Port of Tallinn (2018)

³ <https://www.eestipank.ee/press/eesti-elanikud-reisivad-uha-rohkem-08022018>

Visits to Tallinn by foreign residents by month, 2017



Source: Positium LBS, Statistics Estonia, Port of Tallinn (2018)

Two thirds of all foreign visitors came from five countries – **Finland, Russia, Germany, Latvia and the United States of America.**

By country, the largest amount of visitors came from **Finland** – 1,765,191 visits (-5%), making up 39% of all visits to Tallinn by foreign residents (of which 38% were multi-day visits and 62% single-day visits). Compared to 2016, the amount of multi-day visits from Finland decreased by 10%, single-day visits only decreased by a percentage point compared to the previous year. One of the reasons for the decrease of multi-day visits from Finland could be the increase in accommodation establishments prices and their higher occupancy rate during summer months.

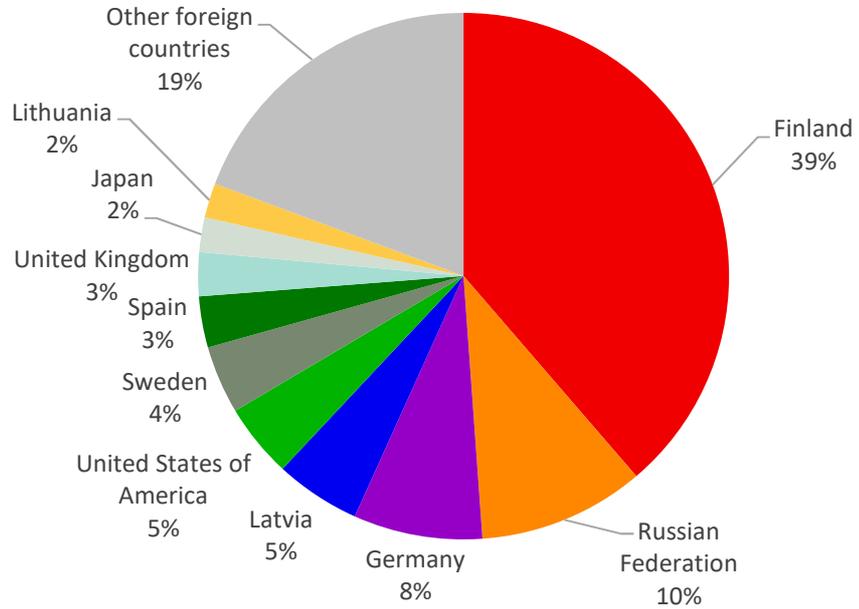
Russians made a total of 462,000 visits (+2%), making up 10% of all visits (of which 41% were multi-day visits and 59% single-day visits).

Followed by visits from **Germany** – a total of 357,000 travels (+15%), making up 8% of all visits by foreign residents (of which 39% were multi-day visits and 61% were single-day visits). The increase in numbers of single-day visits from Germany is probably due to a significant increase in the number of cruise passengers.

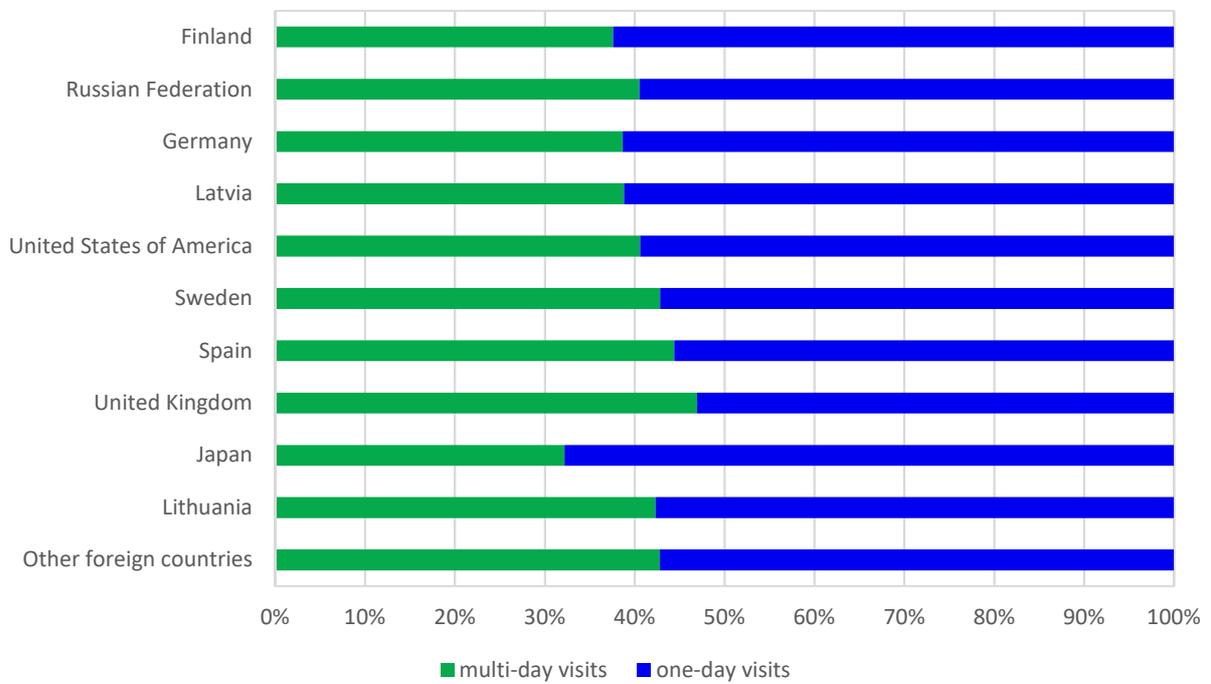
Target markets with a proportion of 5% were **Latvia** and **the United States of America**. A total of 238,000 visits were made from Latvia and based on a comparison by year, the number of visits from our Southern neighbours increased by 16%. The number of single-day visits by Latvians also increased above the average. The residents of USA made a total of 206,000 visits, which was an increase by more than a third compared to the previous

year. The growth of the USA market has most probably also to do with the increase in the number of cruise passengers.

Visits of foreign residents to Tallinn by country 2017



Multi-day visits and same-day visits to Tallinn by foreign residents 2017



Source: Positium LBS (2018)

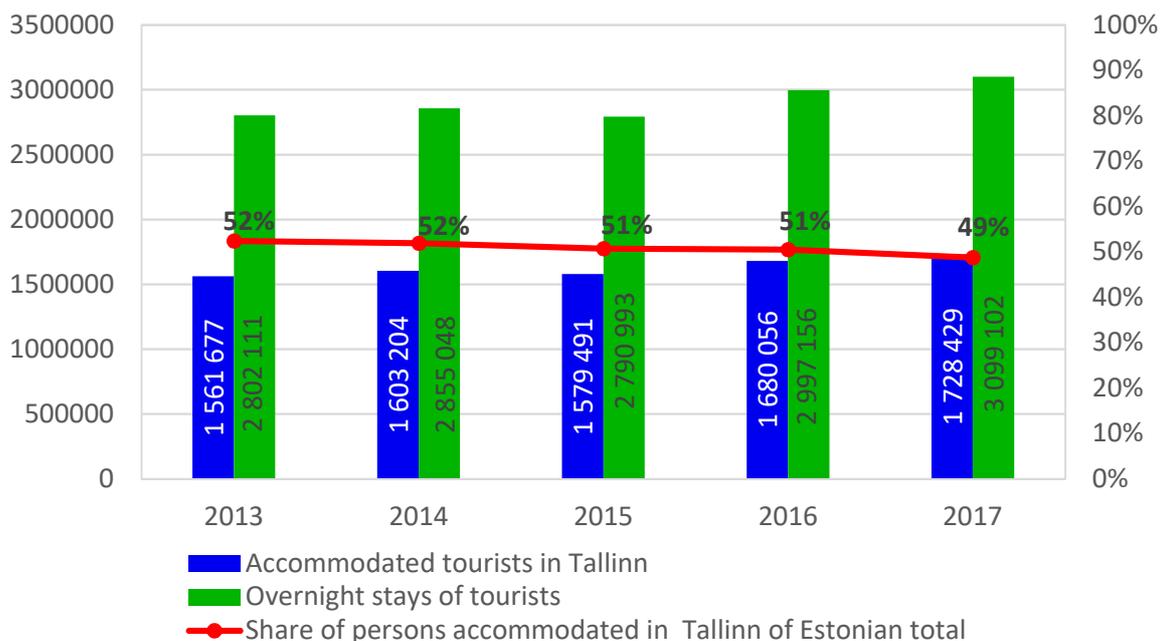
Overnight stays in accommodation establishments in Tallinn

A total of 3.54 million tourists (+7%) spent the night in Estonian accommodation establishments in 2017, making a total of 6.5 million nights (+5%) spent in accommodation establishments. Of them, 61% or 2.15 million were foreign residents (+5%) spending a total of 4.15 million nights in Estonia (+3%). Throughout the year, 1.39 million Estonians (+9%) stayed in accommodation establishments, making a total of 2.36 million nights (+7%). These were the highest numbers of visitors and overnight stays for Estonian accommodation establishments ever. Domestic tourism has increased for the last five years in a row, international tourism showed an increase in numbers for the second year in a row.

Of all the tourists who stayed in accommodation establishments, almost half (49%, a total of 1.72 million) spent the night in accommodation establishments in Tallinn. The number of foreign residents who spent the night in accommodation establishments in Tallinn was 1,493,544 (+2%), and a total of 234,885 (+8%) domestic residents. Compared to 2016, the number of people accommodated in Tallinn (both domestic and international tourists) increased by 3% or by 48,373 tourists. Tourists spent a total of 3,099,102 nights (+3%) in accommodation establishments in Tallinn, including 2,692,846 nights (+2%) by international tourists and 406,255 nights (+12%) by domestic tourists.

Of all the international tourists who stayed in Estonia, 69% stayed in accommodation establishments in Tallinn, and of domestic tourists, 17% spent the night in Tallinn. Thus, of all foreign residents who visit Estonia and spend the night in accommodation establishments, a large amount stays in Tallinn.

Accommodated tourists in Tallinn 2013-2017



Source: Statistics Estonia (2018)

This was the second record-shattering year in a row in the number of city visitors who stayed in accommodation establishments in Tallinn. In 2017, the numbers of both Estonians and foreigners who stayed in accommodation establishments grew.

Looking back five years, or comparing the number of visits with the level it was in 2013, the number of international tourists has increased by 8% (or 104,493 international tourists more than in 2013). At the same time, the number of domestic tourists has increased by 36% (or by 62,259 tourists) compared to 2013. Thus, the number of domestic tourists has increased significantly faster than that of international tourists.

In 2017, international tourists accounted for 86% of all visitors to accommodation establishments in Tallinn, and 14% were Estonian residents.

Accommodated tourists in Tallinn 2013-2017

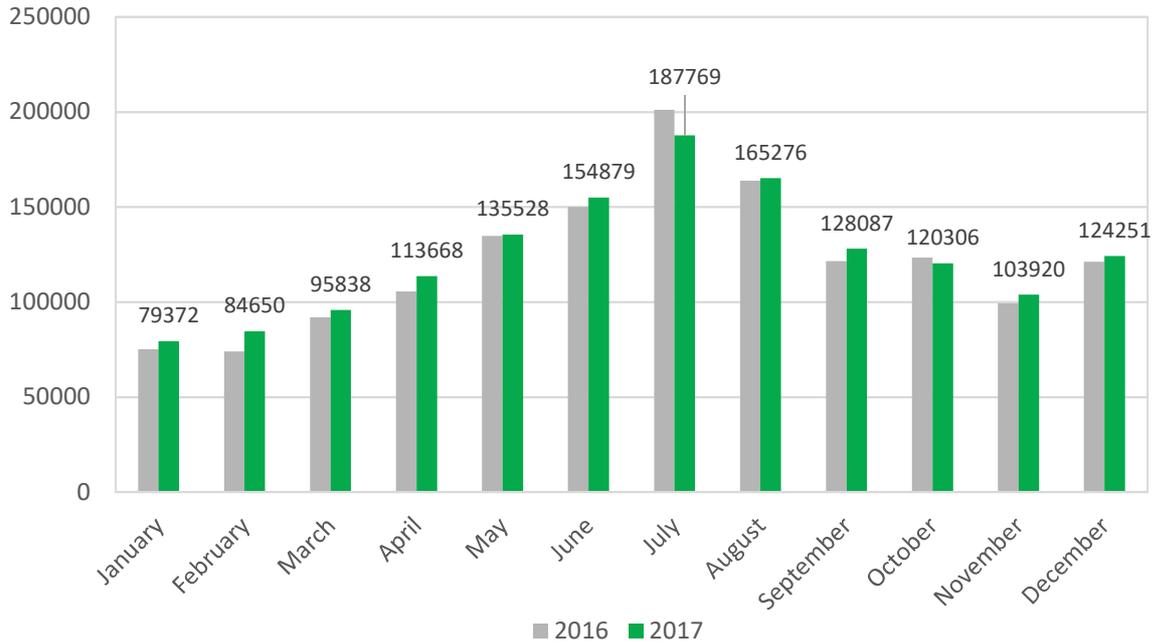


Source: Statistics Estonia (2018)

The number of **international tourists** who stayed in accommodation establishments increased by two percentage points, or by an additional 31,607 visitors in a year. The number of international tourists developed in different directions on a monthly basis. There were ten months that the number of accommodated foreign visitors was higher than in 2016, the biggest increase in the number of foreign visitors in accommodation establishments was in February (+14%). July, which is the high-month of tourism, had less tourists (-7%) arrive in Tallinn, and the number was also lower in October (-4%).

The number of foreign visitors was affected mostly by the increase in prices of accommodation establishments in Tallinn, and the high occupancy rate during summer months. Compared to 2016, the number of leisure travels by international tourists decreased (-2%).

Distribution of international tourists by month



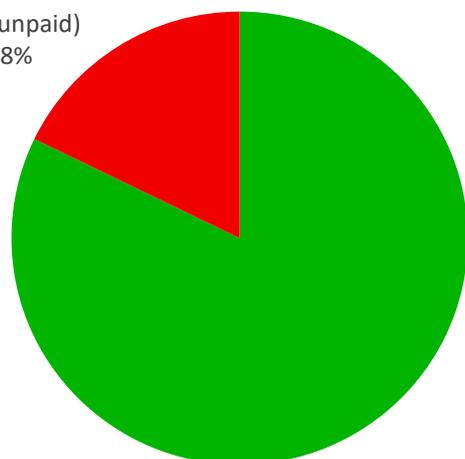
Source: Statistics Estonia (2018)

Multi-day visits to Tallinn vs overnight stays by foreign visitors in accommodation establishments in Tallinn

According to the data retrieved from Positium LBS mobile positioning, Tallinn was visited by 4.56 million foreign residents in 2017, of whom 40% or 1.82 million spent the night in the capital. According to the data by Statistics Estonia, 1.49 million foreign residents stayed in accommodation establishments in Tallinn. Based on the Positium data of multi-day visits by foreign residents, and subtracting the number of international tourists who stayed overnight according to Statistics Estonia, **it can be estimated that 323,005 foreign residents used other types of accommodation in Tallinn, making up 18% of all multi-day visitors who came from foreign countries.** Other accommodation includes free overnight stays (with friends or relatives), AirBnb holiday apartments, etc., and other accommodation in a collaborative economy. Tourists from Latvia, Germany, Sweden and Russia used other accommodation above the average.

Overnight visits to Tallinn by foreign residents

international tourists stayed at other accommodation (incl. unpaid) 18%



international tourists stayed at Tallinn's accommodation establishments 82%

Multi-day visits in total:

1,816,500 (+3%)

International tourists who stayed in accommodation establishments in Tallinn:

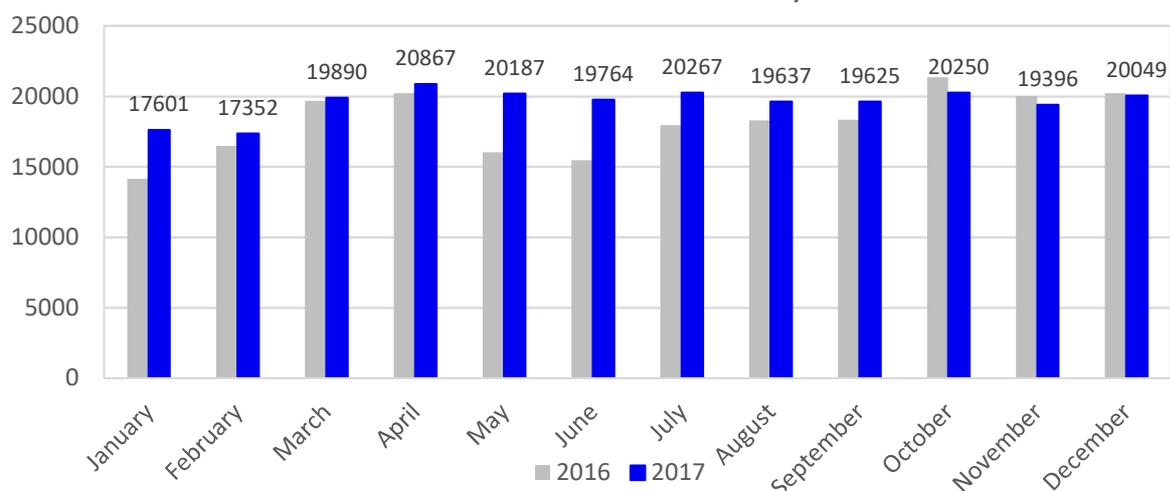
1,493,500 (+2%)

Other accommodation: 323,000 (+5%)

Source: Positium LBS, Statistics Estonia (2018)

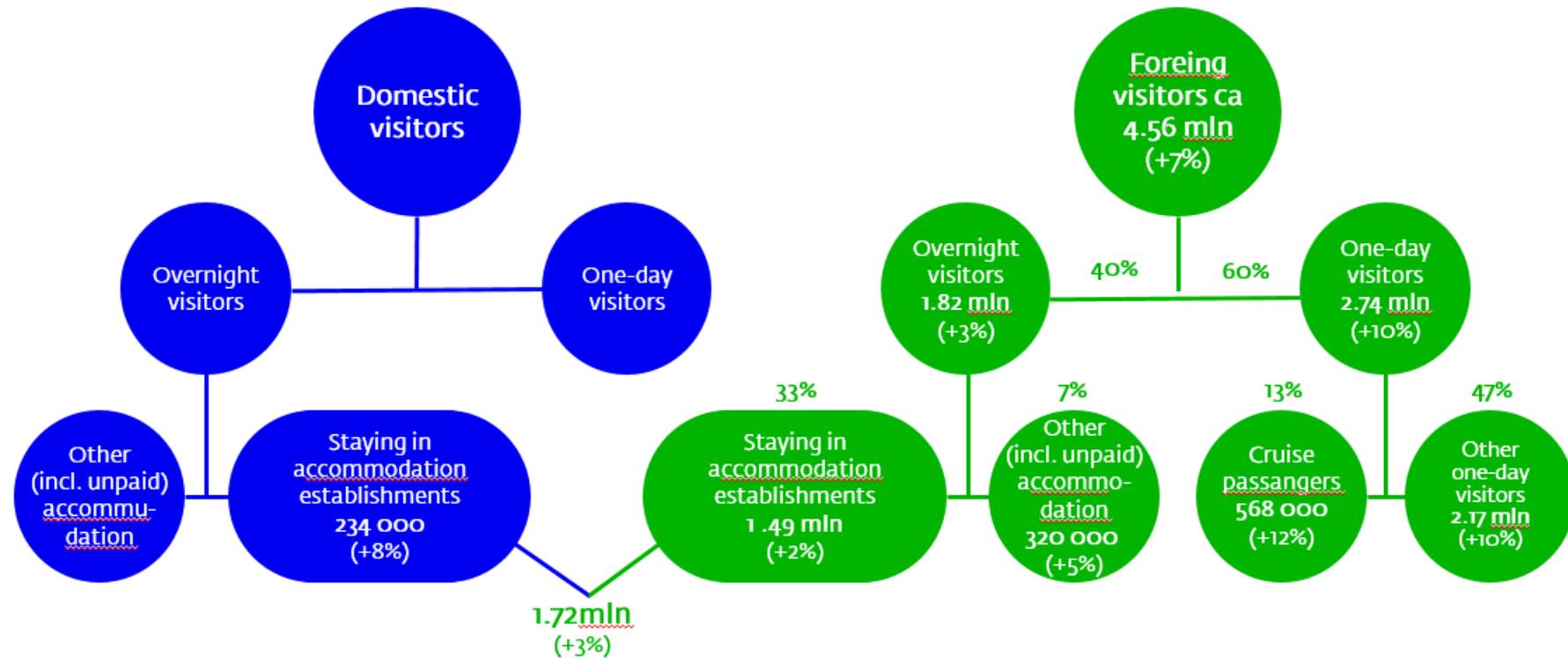
The number of **domestic tourists** increased by 8% in a year. The number of Estonian residents who stayed in accommodation establishments increased in the first three quarters, but decreased in all months in the last quarter. The number of travels by domestic tourists grew the most in June (+28%), but a significant increase in numbers was also in May (+26%) and January (+24%). Numbers showed a downturn in October (-5%), November (-3%) and December (-1%). The demand for domestic tourism grew because of an increase in the number of business trips (+21%) – that was partly influenced by the Estonian Presidency of the Council of the European Union. The number of travels by domestic tourists increased the most in the segment of conference trips (+42%).

Distribution of domestic tourists by month



Source: Statistics Estonia (2018)

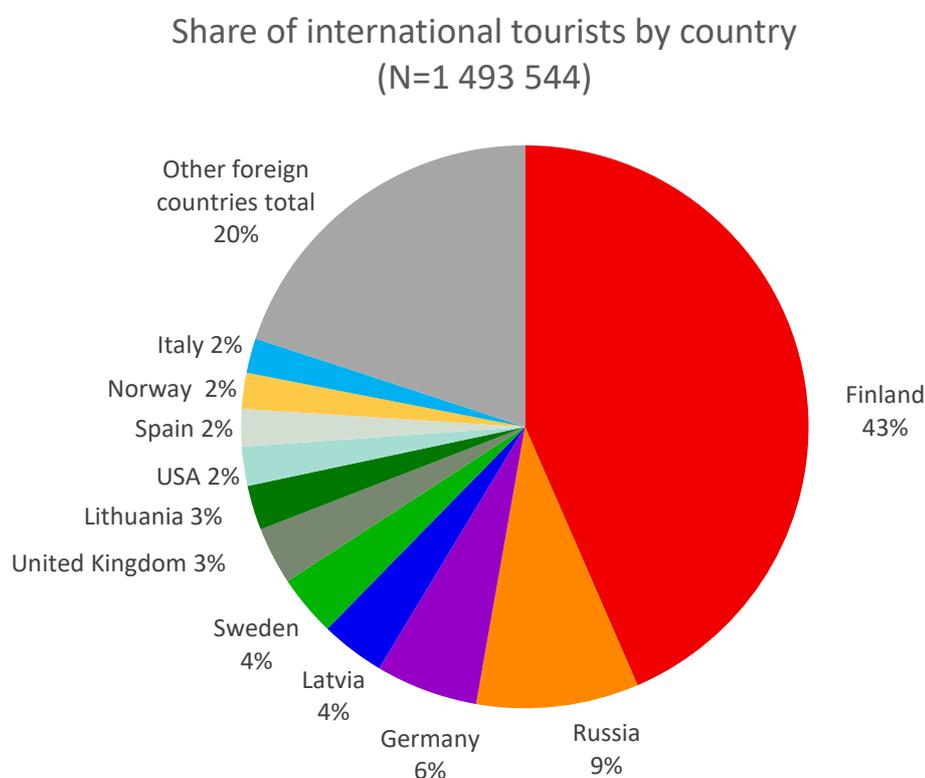
Visitors to Tallinn 2017



International tourists in Tallinn – the numbers and countries of origin

90% of all international tourists who stayed in accommodation establishments in Tallinn came from a European country. 60% of all international tourists came to Estonia from a neighbouring country (Finland, Sweden, Latvia and Russia). Of all the foreign visitors who stayed in accommodation establishments in Tallinn, 5% came from Asia, 3% came from America and 2% came from other parts of the world.

Compared to 2016, the tourism market in Tallinn was more diverse, because more international visitors came from countries that are further away. Higher than the average increase in the number of international tourists was from all Asian markets.



Source: Statistics Estonia (2018)

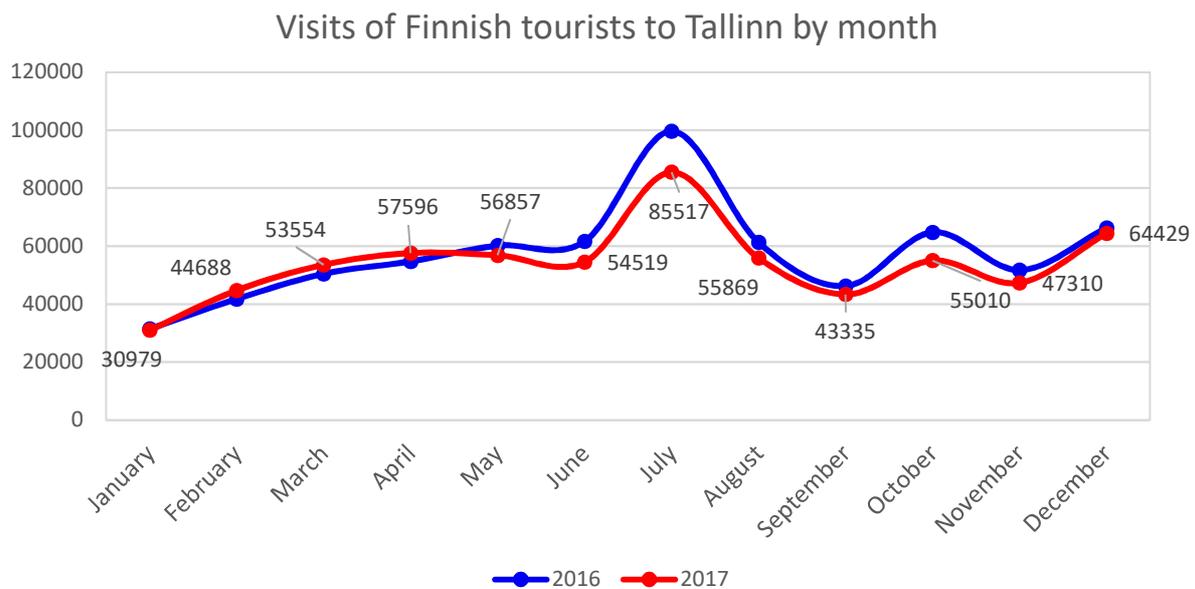
International tourists who came from important target markets for Tallinn (Finland, Sweden, Germany, United Kingdom, Norway, Russia and Latvia), made up 71% of all foreign visitors who stayed at accommodation establishments.

The proportions of foreign markets changed somewhat in a year. The market share of

Finland decreased by four percentage points and the proportion of Russian market grew by one percentage point. Market shares of Latvia, Norway, United Kingdom, Germany and Sweden did not change. The market share of other foreign countries grew by three percentage points.

The largest amount of foreign visitors who spent the night at an accommodation establishment came from **Finland** (43%). The amount of Finnish residents who stayed at accommodation establishments decreased by six percentage points. In a year, 649,700 Finnish people spent the night in an accommodation establishment in Tallinn (-6% or 40,400 tourists less), spending a total of 996,500 nights (-6% or 58,200 nights less). The most tourists from Finland came in summer months, and their interest in Tallinn travels was lowest at the beginning of the year.

On most months, the number of Finnish visitors decreased compared to 2016. The amount of visitors who stayed in accommodation establishments increased in February, March, and April, the highest downturn percentage was in July, which is the high-month of visits from Finnish tourists. One of the reasons was the significant increase in prices of accommodation establishments in Tallinn (in July 2017, the accommodation price was 17% higher than in July 2016, whereas occupancy was the same 84%).



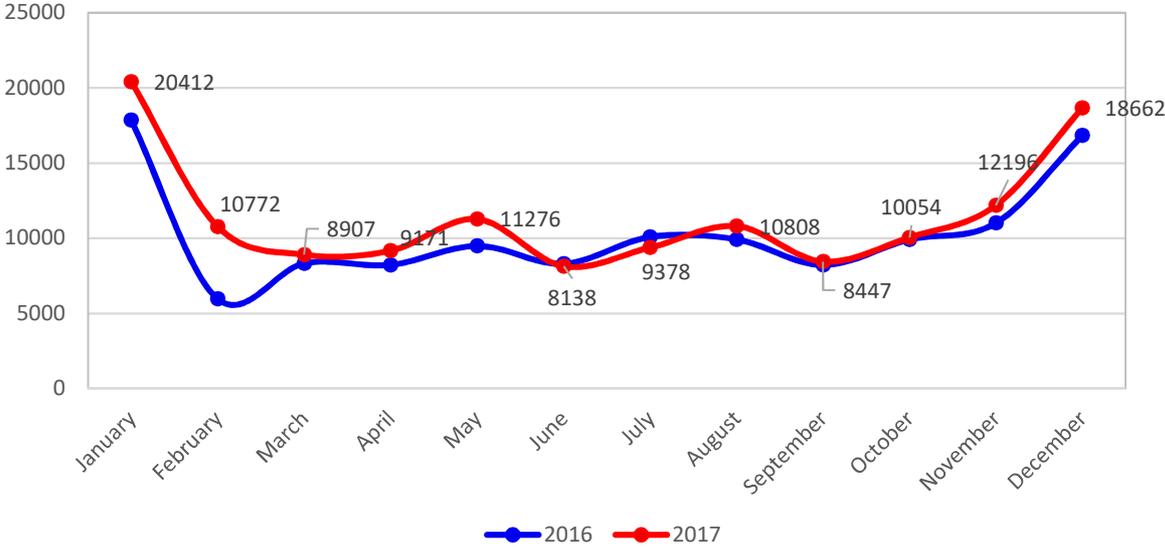
Source: Statistics Estonia (2018)

In 2017, the Russian market continued to grow and the growth rate was faster than the previous year. The market share of Russian market in foreign tourism grew by one percentage point. **Russian tourists accounted for a total of 9%** of all accommodated foreign tourists. 138,200 Russian tourists stayed in accommodation establishments in Tallinn, spending a total of 270,100 nights. The lengths of stay of Russian residents were the same as in 2016.

The number of Russian tourists increased in most months. The months with the highest growth percentage were February (+81%) and May (+19%), tourist numbers decreased in June (-2%) and July (-7%). The highest amount of Russian tourists came in January and December (a total of 39,100 or 28% of visitors of the year).

Russian market showed a growth in demand in other European cities, too. The average amount of overnight stays of Russian tourists to European cities increased by 21%. The state of Russian economy is more stable compared to previous years, and this is why more foreign travels are made. Since the rouble-euro ratio is relatively high, the Russians prefer shorter vacations in neighbouring countries. Tallinn is a popular destination among Russian residents on the so-called „long weekends” related to public holidays, and on the turn of the year.

Visits of Russian tourists to Tallinn by month



Source: Statistics Estonia (2018)

The German market held a 6% proportion in Tallinn. Overnight travels to the European countries by German residents increased by 5%. In a year, 87,000 German tourists stayed in accommodation establishments in Tallinn, spending a total of 191,000 nights. Compared to 2016, the number of German tourists and their stays decreased by 2%. The changes in the amounts of visitors went to different directions throughout the year. The number of both tourists and overnight stays grew at the beginning of the year (from January to April). The number of German tourists who stayed in accommodation establishments was highest in August (a total of 15,800), but the month showed a slight decrease (-1%). Growth percentages were highest in February (+35% more travels with overnight stays) and lowest in July (-12%). Germans prefer to visit Tallinn in the summer period (from May to September) and these were the months when less visitors arrived compared to 2016. The decrease in this market has also most probably to do with the rise in the prices of accommodation in Tallinn.



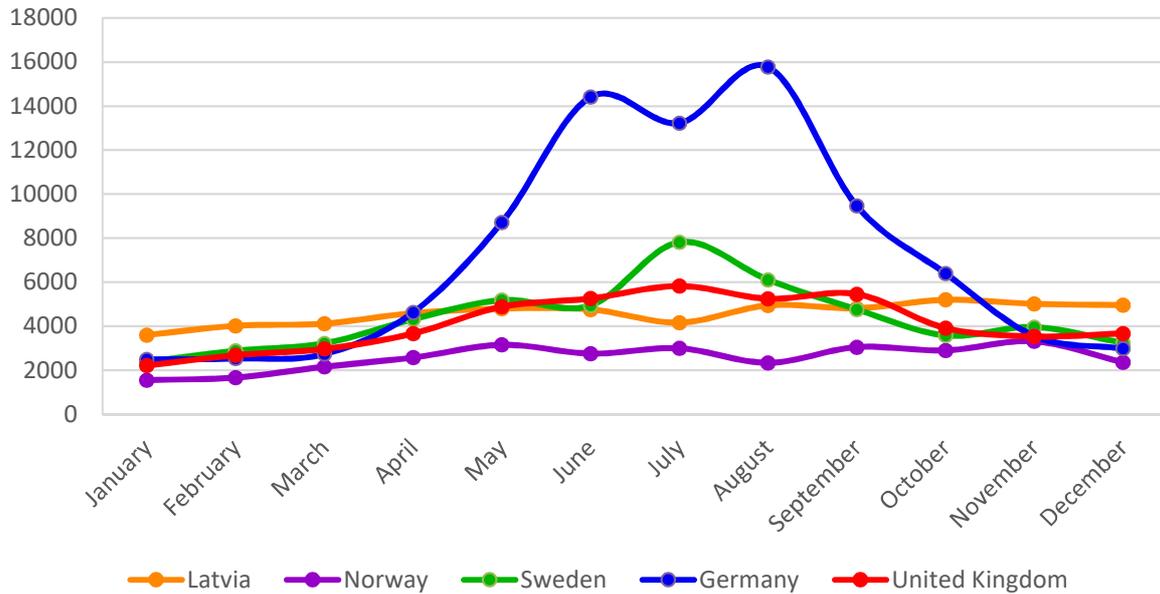
Latvia with a proportion of 4% has grown to be the third largest target market for Tallinn. The travels by Latvian tourists are divided relatively equally by month, being mostly affected by cultural and sports events. The number of tourists in accommodation establishments did not show significant changes, the number of Latvian tourists increased by 1% (a total of 55,000 tourists) and overnight stays by 2% (a total of 90,500 nights).

The Swedish market showed developments similar to Germany; the number of travels to European cities by Swedish residents grew (+3%) but the trips to Tallinn decreased. The number of foreign travels to Tallinn by Swedish residents decreased by 2% compared to the previous year. A total of 52,400 Swedes spent a night in accommodation establishments in Tallinn. Swedish residents spent a total of 83,700 nights in Tallinn, which was 4,900 nights less (-6%) compared to 2016. By month, the amount of travels by Swedes increased the most in April (+17%), but also in February (+15%), June (+10%) and July (+3%). Other months showed a decrease in the number of visitors, the highest fall in numbers was in October (-21%) and December (-15%). One of the reasons for this decrease could be the ship added in the late 2016 to the Riga–Stockholm route, which is why some Swedes prefer a short vacation rather in Riga than in Tallinn.

The United Kingdom market share accounted for 3%. United Kingdom showed the highest growth in numbers in target markets of Tallinn in 2017. The United Kingdom market was affected by both changes in air traffic and the Estonian Presidency of the EU. A total of 49,300 British residents (+21%) stayed in accommodation establishments in Tallinn, spending a total of 109,900 nights (+23%). The average travel length was 2.23 nights and the trips were longer than last year. When the number in flights increases, the number of visitors should increase accordingly. The number of travels with overnight stays to European cities by British residents increased by 6%.

Of all the primary markets in Tallinn, **Norway** had the smallest market share (2%), and this, too, showed a decrease. The numbers of accommodations and overnight stays by Norwegians decreased by 6%. A total of 30,800 tourists (-6%) arrived from Norway, spending a total of 66,600 nights (-13%) in accommodation establishments in Tallinn.

International tourists of other main markets Tallinn by month 2017



Source: Statistics Estonia (2018)

Other larger target markets (Spain, Italy, France, USA and Asia) showed a growth in numbers as well. European city travels by the residents of Southern-European countries increased (France +4%, Italy +4%, Spain +3%). The number of travels made to Tallinn by the Italian, French and Spanish residents also increased. Visitors from these countries usually come on summer months and in addition to travels with overnight stays, many of them visit Tallinn as cruise passengers.

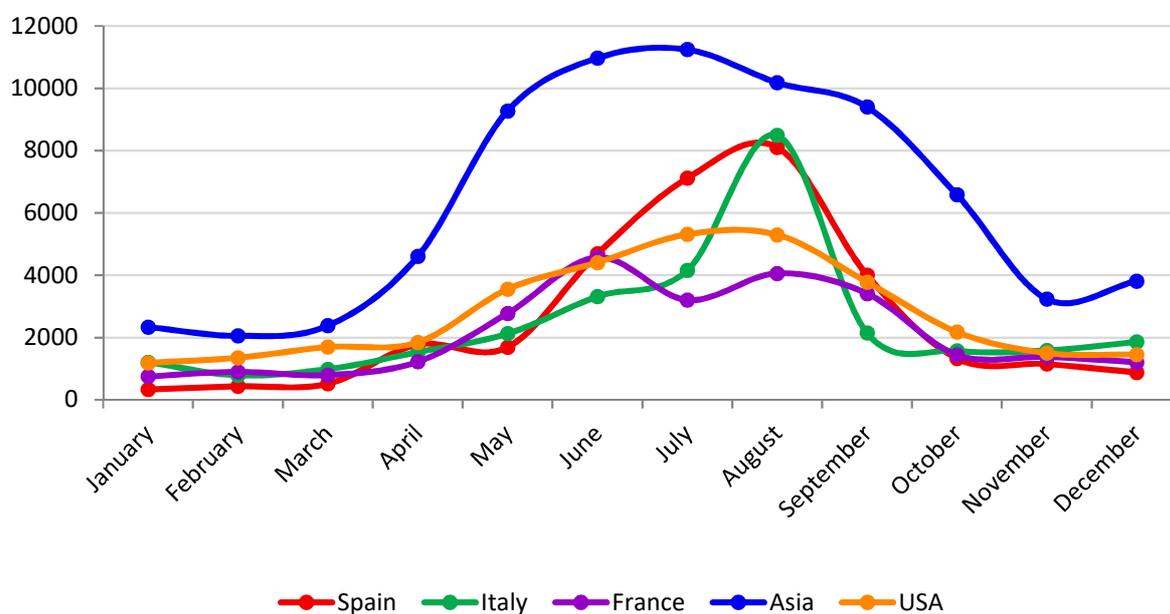
The amount of **Spanish residents accommodated** grew by 12% (a total of 32,000 tourists), but the overnight stays increased by nearly a third (a total of 89,900 nights). **Visits to Tallinn by Italian residents** also showed an upward trend. The number of Italians who stayed in accommodation establishments increased by 4%, but the amount of nights spent decreased by a per cent. **The French market** also showed a growth in numbers in Tallinn. The amount of French residents increased by 18% and overnight stays by 5%.

The number of travels with **overnight stays by USA residents** also increased compared to the previous year. The amount of tourists from there grew by a percentage point, but the overnight stays decreased by a tenth. A total of 33,600 tourists from USA stayed in accommodation establishments in Tallinn, spending a total of 73,500 nights. The growth was highest in March when the amount of USA residents who stayed in accommodation establishments increased by 41% and the biggest decrease was in January (-51%). In 2017, tourists from USA spent an average of 12% more in other European cities.

The Asian market showed a continually rapid growth. The average amount of travels with overnight stays to European cities by Chinese residents increased by 19%, the travels by the Japanese increased by two percentage points.

5% of all visitors who stayed in accommodation establishments came from this area. Compared to 2016, there were 15% more tourists from Asia, but their length of stay was shorter than the previous year. A total of 76,100 tourists arrived from Asian countries. The largest amount of Asian tourists came from Japan (27,630), and the fastest growth was in the Chinese market. Summer months were when the interest in Tallinn by Asian tourists increased. The amount of Chinese tourists increased by a third (a total of 16,300 tourists) and their overnight stays increased by a sixth (a total of 25,300 nights). The amount of tourists from Japan showed an increase of almost a fifth (a total of 27,400 tourists). The amount of tourists from South-Korea also showed a significant growth in numbers, where the number of accommodated visitors grew by 20% (a total of 13,700 tourists).

International tourists from other significant target markets



Source: Statistics Estonia (2018)

The purposes of trips to Tallinn

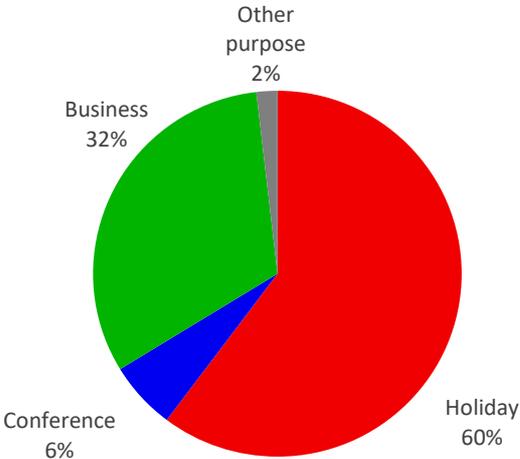
The information about the purposes of city visits is available at the accommodation statistics by Statistics Estonia, where they divided the visitors who stayed at accommodation establishments into three categories: travelling for leisure, work, or other purposes. Work-related trips are divided into conference or training purposes and travelling for business.

Of the 1,728,429 tourists who were accommodated in accommodation establishments in Tallinn in 2017, divisions by purpose went as follows: **69%** (1,198,076) **for leisure**

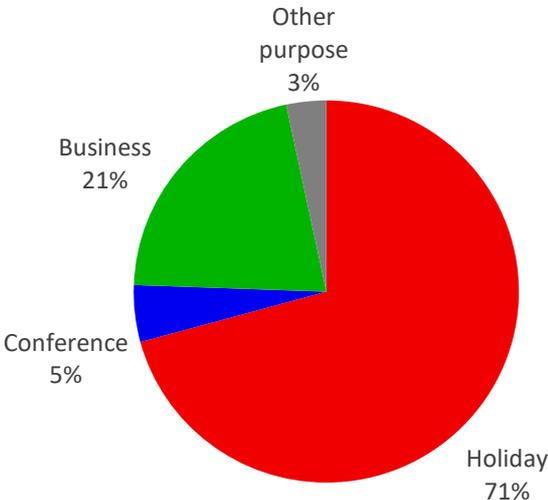
purposes, 23% (390,123) for business purposes, 5% (85,845) for conference purposes and 3% (54,385) city visitors visiting for other purposes (studying, health, etc.).

Compared to 2016, there were slight changes in the division of travel purposes. Less visitors came on vacation (-13,811 or -1%) than last year. There were more business travellers, people who participated in conferences and seminars, and city visitors for other purposes; there were 27,832 business travellers (+8%), 15,801 conference travellers (+23%) and 18,551 travellers for other purposes (+52%) more.

Domestic tourists by purpose of travel (N=234 885)



International tourists by purpose of travel (N= 1493 544)



Source: Statistics Estonia (2018)

A large part of international tourists (71%) came to Tallinn on vacation. 21% of accommodated people were on business trips and 5% came for conferences-seminars. A small part (3%) of accommodated people stayed in accommodation establishments for other purposes. Compared to 2016, the number of leisure tourists decreased by 2%, the number of business travellers increased by 8% (including an increase of 19% of conference tourists) and the number of city visits for other purposes increased by 70%. By month, the largest number of leisure tourists came in July (that month, 78% of all international tourists came for leisure) and the largest number of business travellers came in September (32% of all trips that month). International tourists participated in conferences the most from September to November (7% of city visitors came for conferences).

Six out of ten domestic tourists (60%) stayed in accommodation establishments in Tallinn for leisure purposes. City visits for work purposes accounted for 38% (whereof 32% were business trips and 6% conference trips). Visits for other purposes made up 2%.

The number of Estonian residents who stayed in accommodation establishments increased by 8%, but by purposes, the changes in the numbers of tourists went different directions. Compared to 2016, the number of vacation trips increased by 2%, conference trips by 42% and business trips by 18%. Trips for other purposes decreased by a third (33%).

By month, the largest amount of Estonian residents came on vacation in July (65% of all trips made in July by domestic tourists) and on business trips in May (44% of all trips). The amount of domestic tourists among conference travellers was highest above the average on autumn months (7% of all trips in September, October and November).

The seasonality of tourism in Tallinn and the lengths of stay in Tallinn

Compared to other European cities, the visits to Tallinn were relatively seasonal and short.

The seasonality of tourism in Tallinn

The trips of people who stayed in accommodation establishments in Tallinn are divided unequally across year and there have not been many changes in tourism seasonality in the last ten years. About 68% of tourists visit the city from April to October, and a third of all visitors on summer months. The high-month of tourism in Tallinn is July.

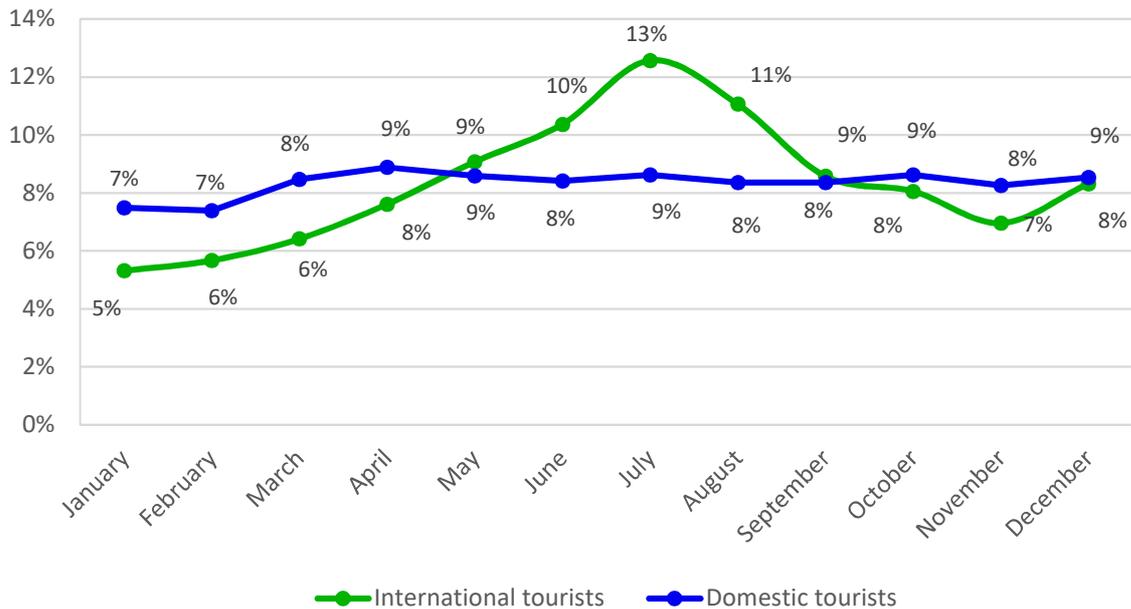
The seasonality showed a slight decrease in 2017 compared to the previous year. The Gini coefficient of visitors to Tallinn was 0.136⁴ in 2017 (being 0.154 in 2016 and 0.158 in 2015). In the three summer months, a third of all visitors of 2017 stayed in accommodation establishments. Half (51%) of all visits to Tallinn were made from May to September. More than two thirds (68%) of all city visitors who used the services of accommodation establishments came from April to October.

The seasonality of tourism in Tallinn decreased compared to 2016, mainly because the numbers of visits made by Finnish tourists in July decreased significantly. The decrease in seasonality was supported by the increase in the number of accommodated people from other markets, whose trips are divided more equally across year (Russia, United Kingdom, Latvia).

Domestic tourists visit Tallinn relatively equally on all months, but international tourists come mainly on summer months.

⁴ 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 one, this means that tourists visit in only one month a year. If the coefficient is zero, the number of tourists visiting each month is equal throughout the year.

Distribution of visitors to Tallinn by month (Gini=0.136)



Source: Statistics Estonia (2018)

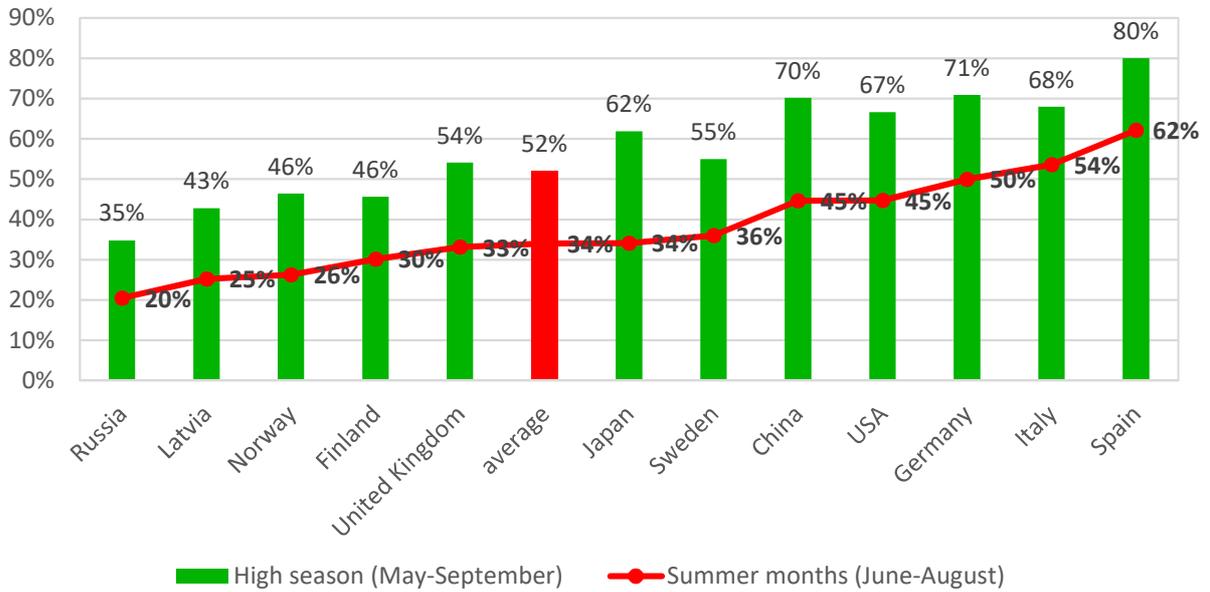
More than half of the international tourists (52%) visited Tallinn from May to September, most visits were made in July – 13% of all visits to Tallinn by international tourists in a year. The interest in travelling to Tallinn was lightest in January (5% of all trips made in a year).

Seasonality can be seen by target markets, too. Residents from Spain, Italy and Germany travel mostly in summer – more than half of their city visits were made in the three summer months.

Residents from further countries (USA, China, Japan) made a large part of their city visits in the high season of tourism (from May to September). Visitors from United Kingdom, Latvia and Norway were divided more equally across year and the amount of summer travels to Tallinn made by them accounted for almost a third of their trips in a year.

Although only 30% of Finnish tourists visited Tallinn on summer months, the highest amount of their visits were made in July (13%). Swedish residents also made the most visits on summer months. Trips made by Russian tourists were also divided unequally across the year, but their high-months fell on the low season of tourism (January and December); the travels by Russian tourists decreases the seasonality of tourism.

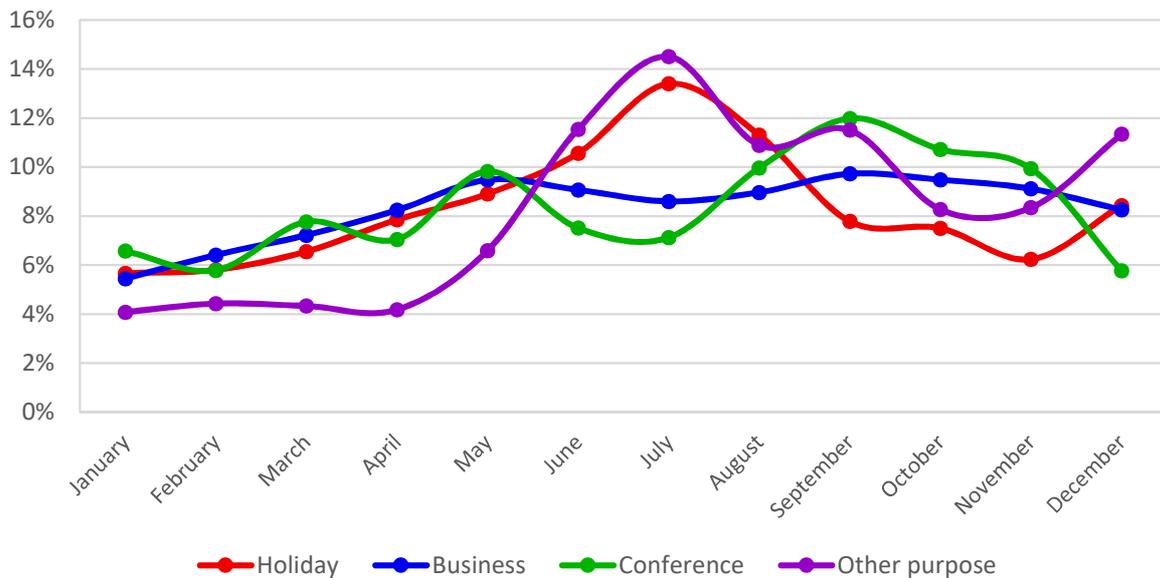
Proportion of high season trips from main foreign markets of Tallinn in 2017



Source: Statistics Estonia (2018)

Seasonality can also be seen in the purposes of the trips: most leisure travels are made on summer months, business travels are divided more equally by month and the most city visits by conference participants were made in autumn months.

Seasonality by purpose of travel 2017



Source: Statistics Estonia (2018)

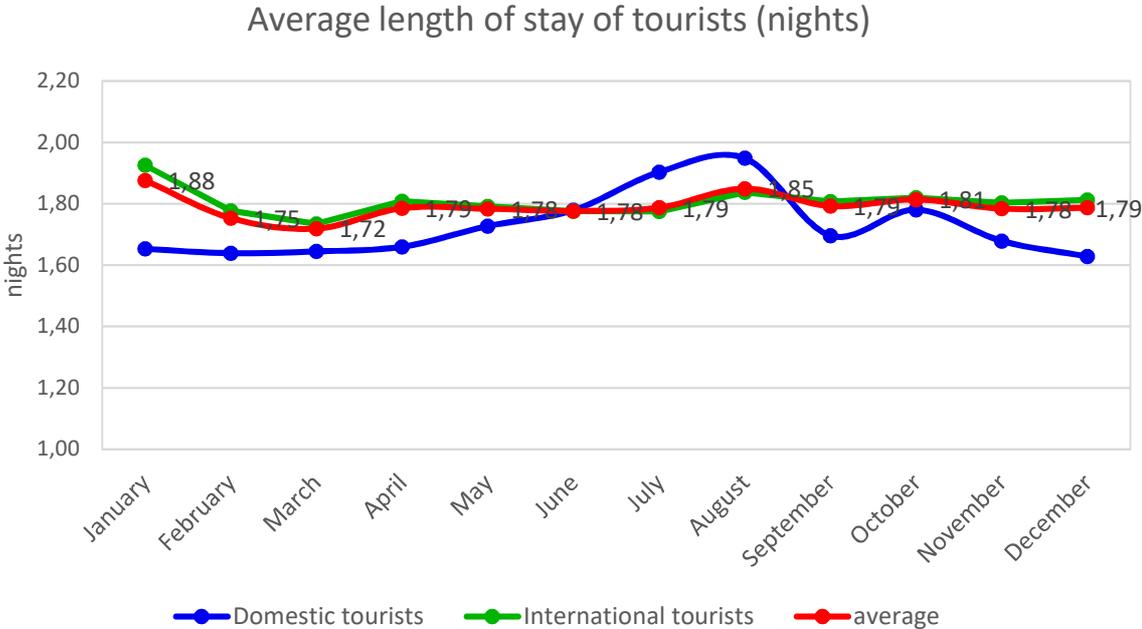
35% of all leisure travels in 2017 were made in the three summer months and the numbers were highest in July (13%). Conference travels tended to take place in autumn – 23% of all conference and training travels were made in September and October (the number was highest in September – 12%). Business travels were divided most equally across the year (about 8%–9%). The highest amount of business trips were made in September (10% of all business trips of the year) and the lowest in January (5%). The high-point of visits for other purposes was in July (15% of all trips made for other purposes) and the number was higher above the average (11%) in December, most probably for the amount of travellers visiting their friends and family.

Concluding that the seasonality of trips made to Tallinn is high because most are made for vacation purposes.

The length of stay of tourists who spent the night in accommodation establishments

In 2017, the average length of stay of visitors who stayed in accommodation establishments in Tallinn was 1.79 nights and this showed no change (0%) and changed relatively little by month.

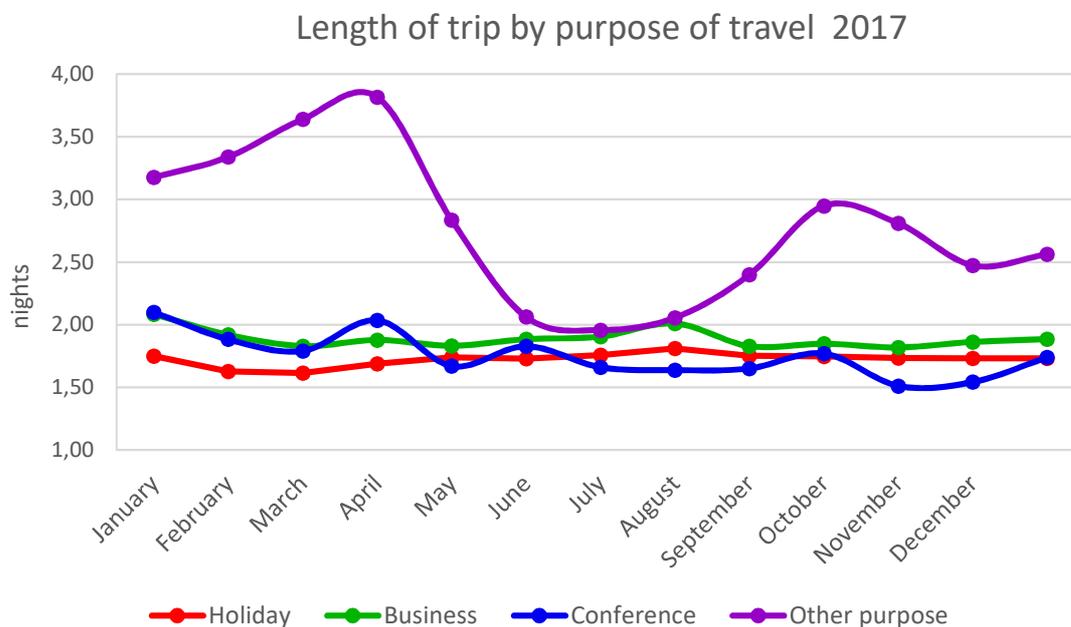
The longest trips were made in January (1.88 nights) and the shortest in March (1.72 nights). The average length of stay by domestic tourists in accommodation establishments in Tallinn was 1.73 nights (+4%). International tourists spent an average of 1.80 nights (0%). Of the important foreign markets to Tallinn, the longest stays were made by the Brits (an average of 2.23 nights), the shortest stays were by Finnish tourists (an average of 1.53 nights).



Source: Statistics Estonia (2018)



Vacation travels lasted an average of 1.73 nights, business travels 1.89 nights, conference travels 1.74 nights and city visits for other purposes 2.26 nights.



Source: Statistics Estonia (2018)

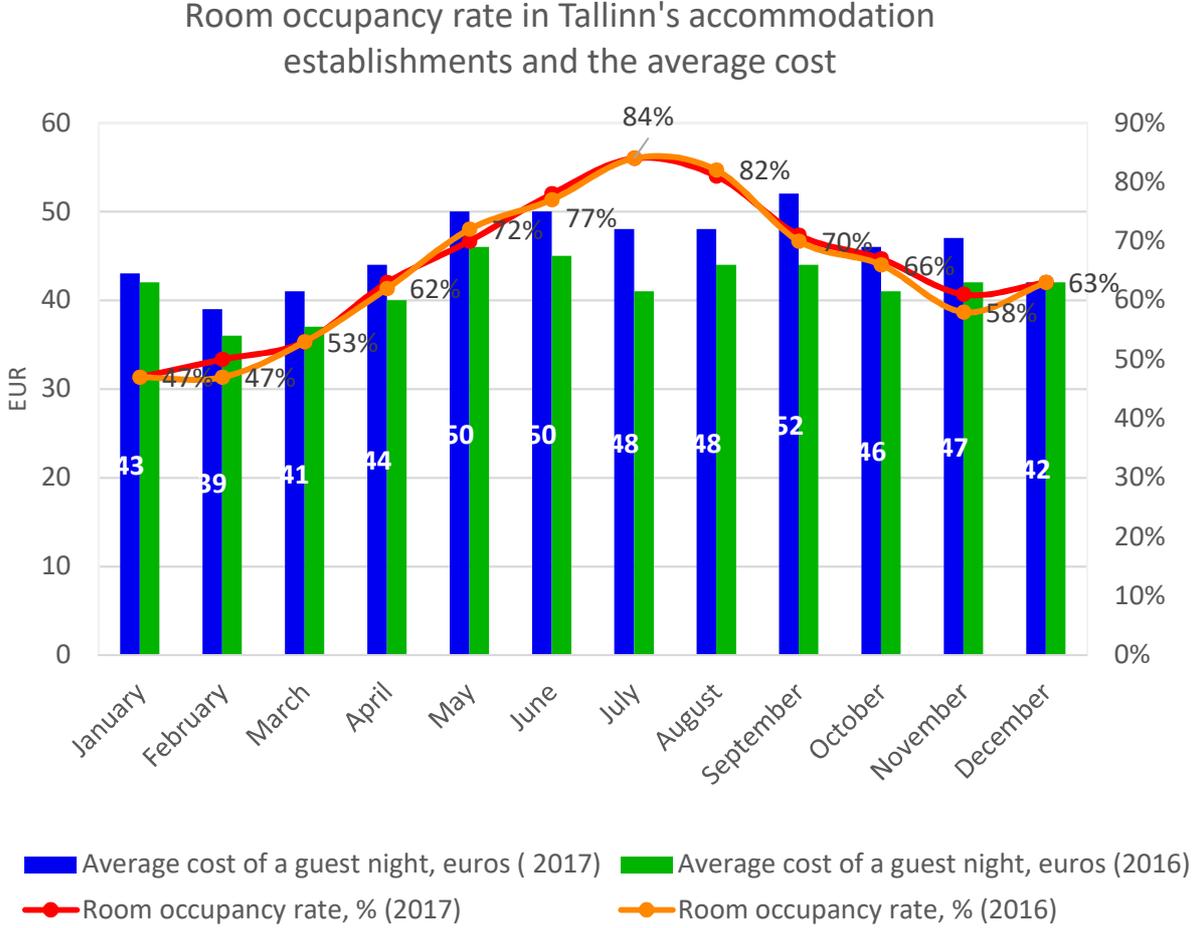
Accommodation establishments in Tallinn

The market economy of Tallinn in 2017 was characterised by a growth in accommodation prices, an increase in the income of accommodation establishments from the sale of accommodation services, and a growth in room productivity. According to Statistics Estonia, 164 accommodation establishments⁵ operated in Tallinn, including 61 hotels. 8,477 rooms and 16,234 beds were for sale on average across the year.

The number of accommodation service providers varies seasonally, because a large number of accommodation establishments in Tallinn are service apartments, bed-and-breakfast places or guest houses. The highest amount of accommodation service providers operated in June (146 establishments) and the lowest in October (136 establishments). The amount of rooms for sale varied even less because most of rooms are for sale at hotels; the interval between months with the highest and lowest numbers of rooms for sale was 163 rooms.

⁵ Statistics Estonia includes establishments which offer more than five beds.

The average room occupancy rate in accommodation establishments in Tallinn was 66% and compared to 2016, it showed no change. The room occupancy rate varied by month – the lowest was January when 47% of all rooms for sale were occupied, and the highest in July (84%).



Source: Statistics Estonia (2018)

The average price per night was 46 euros which is 10% higher than in 2016. The average accommodation price was highest in September (52 euros), when most of the events related to the EU Presidency took place. Accommodation prices were relatively equal across the year, prices were lowest in February (an average of 39 euros) and highest on the high-months of business trips (50 euros in May, 50 euros in June, 52 euros in September).

The increase in the accommodation prices helped to grow room productivity (RevPAR) and increase the income of accommodation establishments from the sale of accommodation services. In 2017, accommodation establishments in Tallinn made a total of 143.9 million euros from selling accommodation services, and compared to the previous year, the income of accommodation establishments grew by 14 per cent.

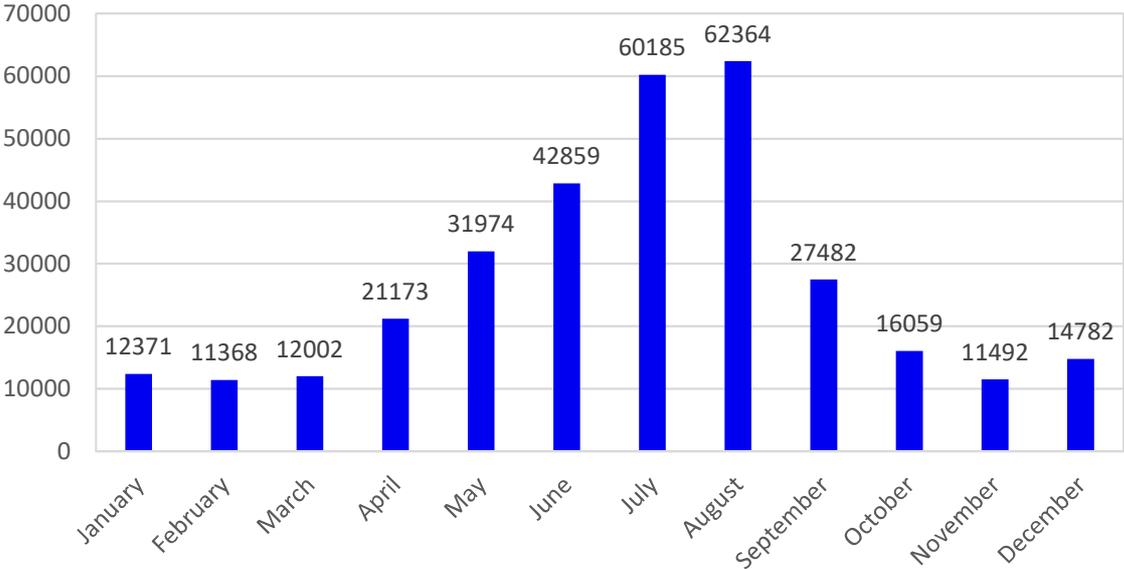
Visits to Tallinn Tourist Information Centre

In 2017, the **Tallinn Tourist Information Centre served over 328,000 customers** (+9%). Most of the visitors found the information they needed on their own from the materials displayed. 18,400 approached staff for information. 86% of the queries were made by foreigners and 14% by Estonians. Additionally, 2,300 queries were answered by summer employees, who gave out tourist information during the summer months in Tallinn old town and in the region of the port.

Tourist Information Centre had the most visitors during the summer months (51% of all visits made in a year). 76% of visitors visited the Tourist Information Centre from April to September. Tourist Information Centre served the most customers in August when there were the most cruise passengers among city visitors.

Visitors to the Information Centre were mostly interested in sights, museums and excursions, and many of them took a map to the city. They were also seeking information about public transport and were very interested in events, catering, trading and other services.

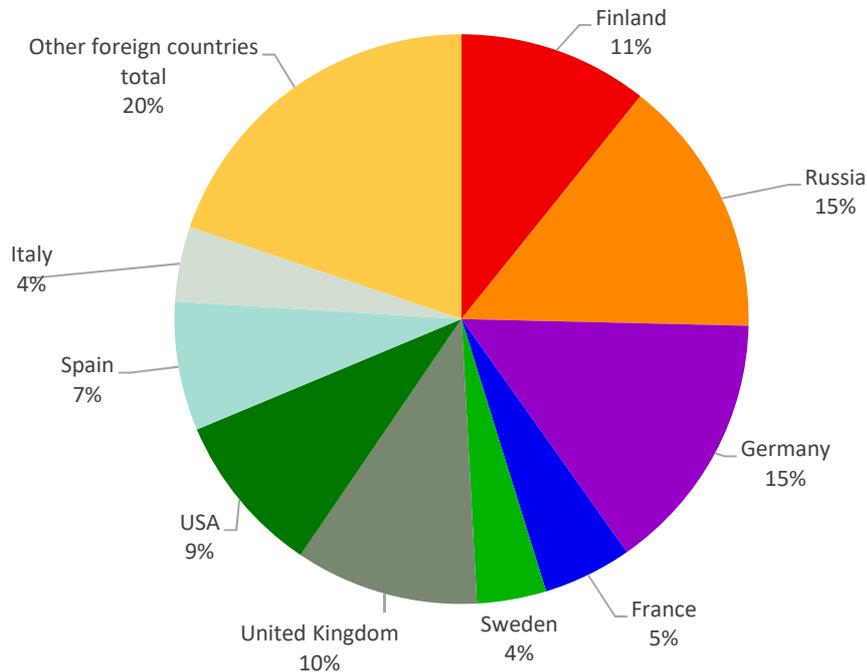
Visits to Tallinn Tourist Information Centre 2017



Source: Tourist Information Centre 2018

Queries were made by visitors from almost 100 countries. Most queries were made by Germans and Russians (both over 2,600 queries or 15% per cent of all queries), followed by Brits (1,900 queries or 10%) and residents of USA (9% of all queries).

Queries by country 2017



Source: Tourist Information Centre 2018

Visits to tourism website VisitTallinn.ee

Tallinn tourism website VisitTallinn.ee received a total of **5.6 million pageviews** (+5%) in 2017, and **1.78 million** sessions were made. An average of 3.13 pages were viewed by session and the average duration of the visit was 3:13 minutes.

The most significant change was in the channels through which people found the webpage. Most persons found the page through search engines (73%) but an increase in numbers of more than two times were findings through social media channels (highest increase from Facebook and Instagram).

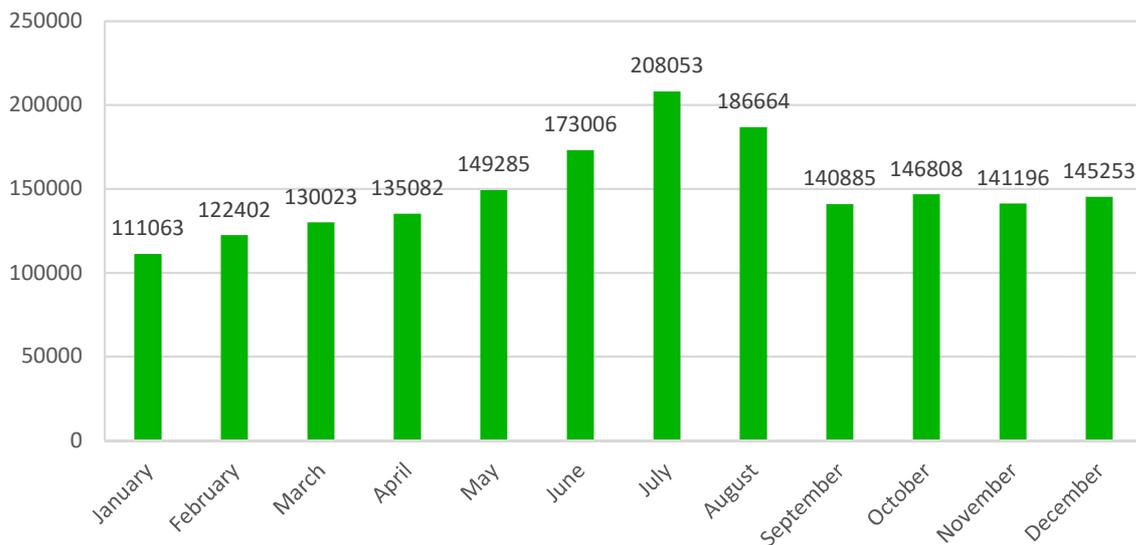
Visits to the tourism website are divided by month similar to city visitors. 32% of all visits were made in the summer months. It can be thus assumed that many people seek tourism information from VisitTallinn.ee when in Tallinn, or directly before the visit.

By language environments, the English section received the most views (2.17 million pageviews) followed by views in the Finnish section (1.32 million pageviews), the Estonian section (1.29 million pageviews) and the Russian section (1.07 million pageviews). Compared to the previous year, the growth was highest in the number of English section

pageviews (+25%), the interest in the Japanese section increased also significantly (+85%).

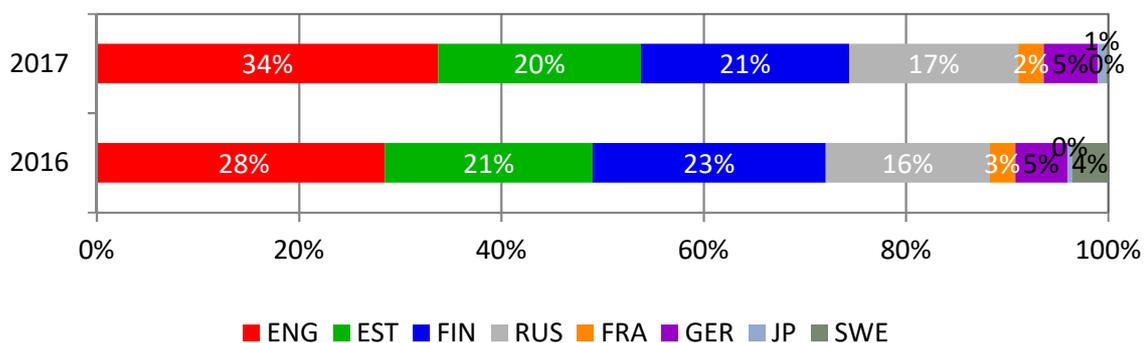
The users of the tourism website were most interested in sights and events, but information about public transport and diners also got a lot of attention.

Visits to Tallinn tourist website by month 2017



Source: Google Analytics

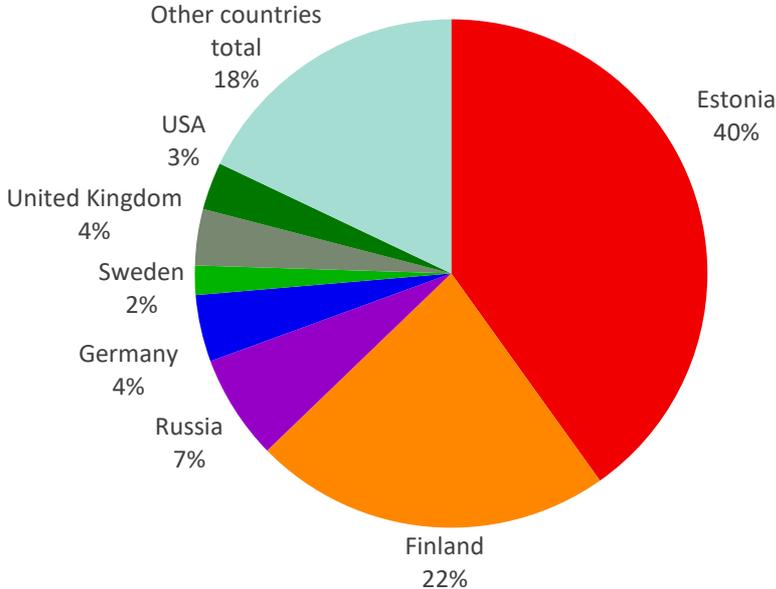
Pageviews on visittallinn.ee by language environment 2017



Source: Google Analytics

By location, most visits were made from Estonia (40%), Finland (22%) and Russia (7%). Compared to 2016, the number of visits made from Estonia increased by a fifth and it can be presumed that the tourism website was used more than the previous year to seek tourism information on location.

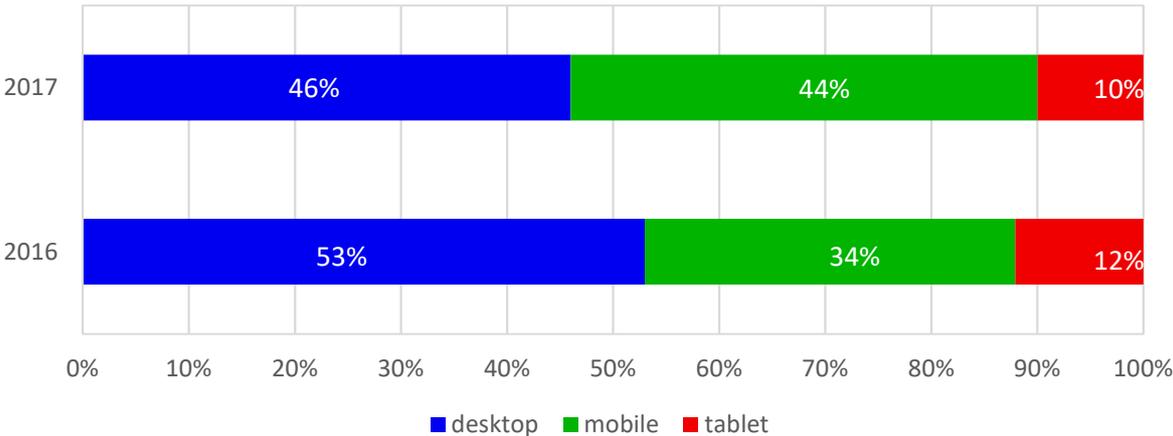
Visits to Tallinn tourist website by country 2017



Source: Google Analytics

Similar to last year, visits using a mobile device increased and visits using desktop computer or tablet decreased.

Visits by device



Source: Google Analytics



Income from tourism in Tallinn

According to the Bank of Estonia⁶, the export from travel services was 1.44 billion euros (+7%). The Bank of Estonia estimates the proportion of expenses made by foreign visitors in the export of travel services to be almost 1.2 billion euros or 3% more than in 2016.

Given the regional distribution of foreign visitors and the structure of travel-related expenses made by foreign visitors, Tallinn is accounted for 80% of all Estonian export of travel services. The estimated export of travel services is thus 1.15 million euros and the expenses made in Tallinn by foreign visitors account for almost 960 million euros of that.



Source: Bank of Estonia (2018)

Passengers at Tallinn Airport

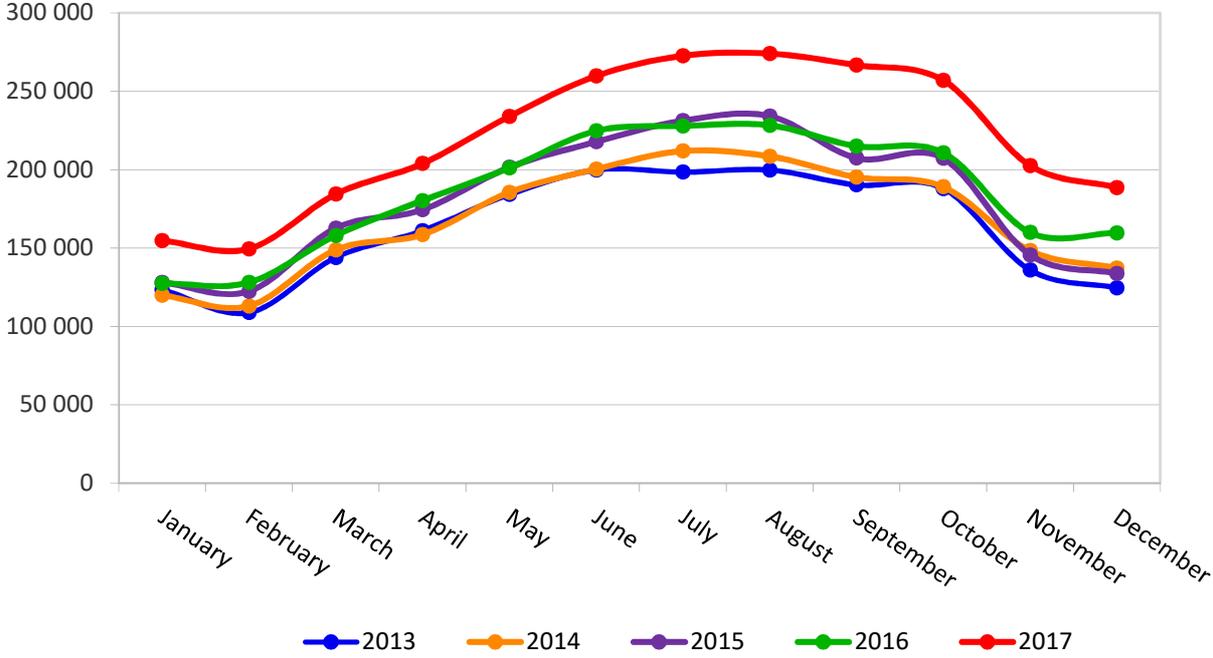
2.64 million passengers were served at Tallinn Airport in 2017, which is an increase of 19% compared to the previous year (Tallinna Lennujaam, 2018). 99% of all passengers were served on international airlines. 85% of passengers were on scheduled flights and 15% on charter flights.

There was a total of 34 international direct flights. The highest number of passengers were on Helsinki (11%), Frankfurt (11%), Riga (9%) and Stockholm (9%) routes. In 2017, there were 16 regular airlines flying from Tallinn airport, the largest of which was Nordica with a

⁶ <https://www.eestipank.ee/press/eesti-elanikud-reisivad-uha-rohkem-08022018>

23 per cent market share, followed by airBaltic (15%), Finnair (9.5%), Lufthansa (9.3%) and Ryanair (8.7%).

Air passenger at Tallinn Airport month by month 2013-2017



Source: Tallinn Airport (2018)

The increase in the number of passengers remained on an average of 16% on the first half of the year, but on the second half, the numbers of passengers increased by a fifth or more in almost every month. The number of passengers on charter flights increased by 31% in a year.

The increase in the number of passengers was caused by a larger number of destinations and flights, and an increase in the number of passengers (+69%) on Nordica, one of the main airlines. New routes were opened in 2017 to Saint Petersburg, Gothenburg, Hamburg and London. A flight to Hamburg was added to the seasonal flights.

Passengers at Tallinn’s Old City Harbour

10.5 million passengers passed Tallinn’s Old City Harbour, which is an increase by 3% in the number of passengers compared to 2016.

The number of passengers on Tallinn-Helsinki route grew to 8.83 million and made up 83% of all passengers. From January to the end of December, 1.03 million people (10%) travelled on Tallinn-Stockholm route and 83,000 persons (1%) travelled on the Saint

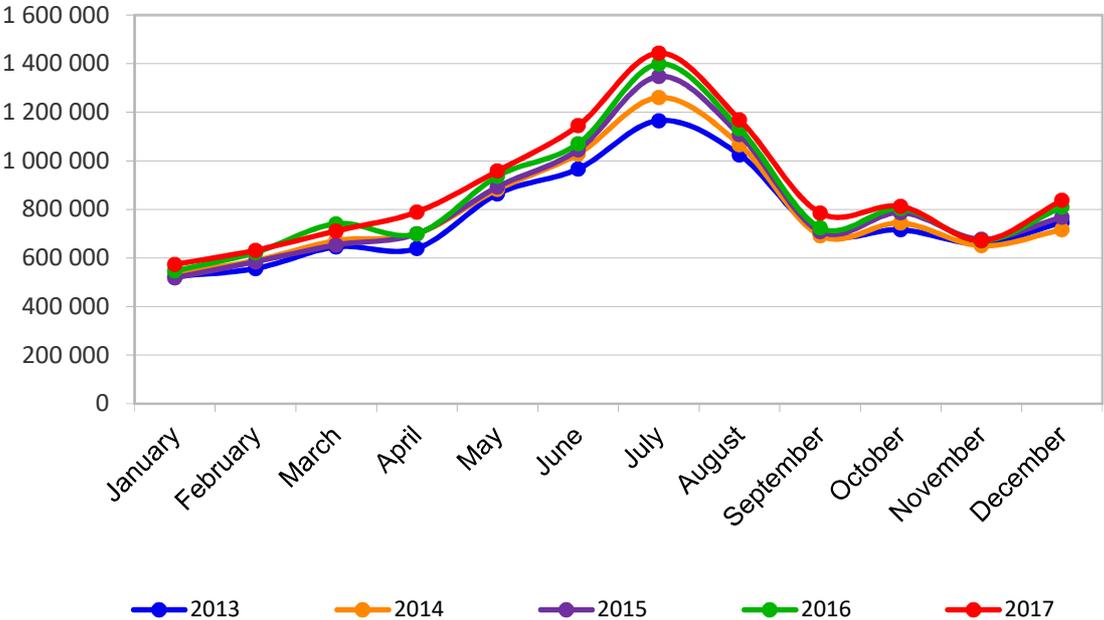


Petersburg route. Cruise passengers accounted for 6% of all travellers in the Tallinn’s Old City Harbour, and they were a total of 564,280 passengers.

57% of all passengers or 6.05 million people were travelling with Tallink, followed by VikingLine with 22%, Eckerö Line with 14% and St.Peterline with one per cent of passengers.

The ship with the highest number of passengers was Megastar, which had a total of 1,997,312 passengers on board in a year. Next by popularity were VIKING XPRS and Star (accordingly 1,751,820 and 1,668,454 persons), which travel to and from Finland. On Tallinn-Stockholm route, Baltic Queen, a Tallink ship, had the highest number of travellers (564,231 passengers) in a year.

Passengers in Tallinn Old City Harbour 2013-2017

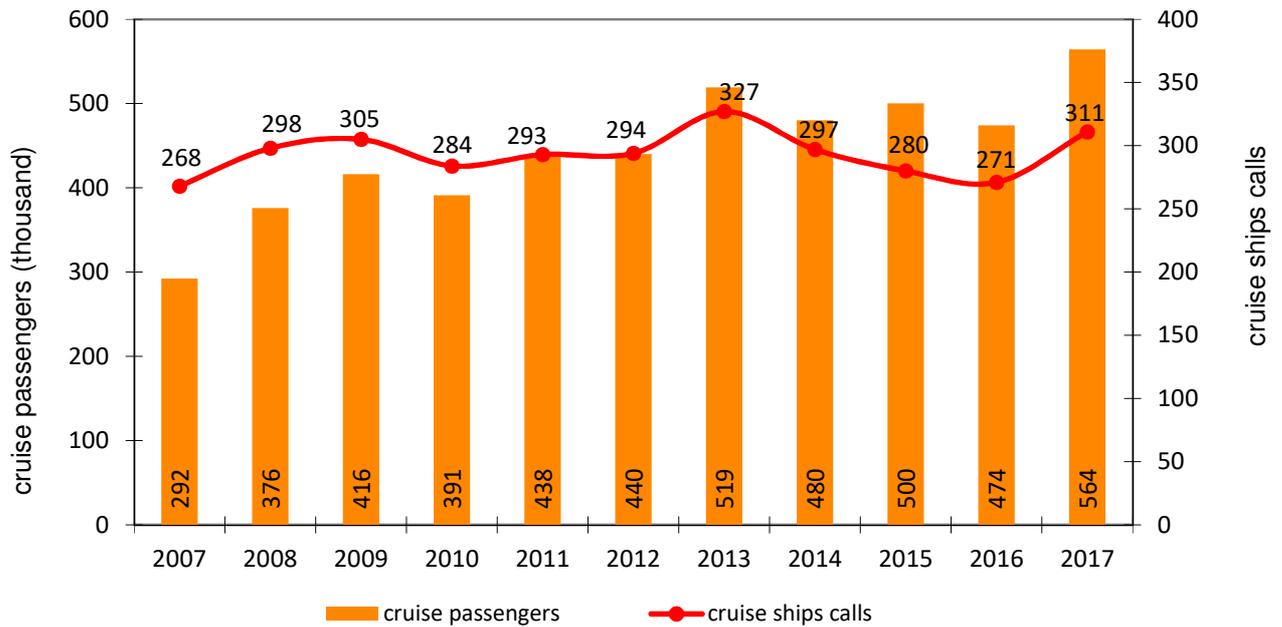


Source: Port of Tallinn (2018)

Tallinn was the third most popular station of cruise ships that travel in the Baltic Sea region. In 2017, cruise ships stopped in Copenhagen 325 times, in Saint Petersburg 319 times and in Tallinn 311 times.



Cruise ships calls and passengers in Tallinn



Source: Port of Tallinn (2018)

Summary

In 2017, foreign residents visited Tallinn 4.5 million times. The number of foreign visitors increased by 7% in a year. Of all the international tourists who visited Tallinn, 1.82 million persons (40%) stayed overnight. 2.74 million single-day visits were made and cruise travels accounted for a fifth of them. The number of tourists was affected by events that were related to the Estonian Presidency of the Council of the European Union, the increased travel demands by Russian residents, and the cultural and sports events that took place in Tallinn in 2017.

A total of 1.72 million tourists stayed in accommodation establishments in Tallinn, which is a 3% increase compared to 2016. Of all the visitors accommodated in Tallinn, 86% were international tourists, most of whom (60%) came from neighbouring countries (Finland, Russia, Latvia and Sweden). A total of 3.09 million nights were spent in accommodation establishments in Tallinn.

Tallinn is continually appreciated as a destination for vacation. 69% of all city visitors came to Tallinn for leisure purposes, 23% came on business trips, 5% came on conference trips and 3% came to the city for other purposes. By purposes of trips, the number of participants in conferences and trainings showed the fastest growth, both among Estonian residents (+42%) and foreign visitors (+19%).

Visits to Tallinn are relatively seasonal compared to other European cities, and the trips are short. The length of travel did not change in 2017, an average length of travel was 1.79 nights. Two thirds of all city visits were made from April to October, and the largest number of city visitors came in July.

One hotel and some smaller accommodation establishments were added to the accommodation market. 164 establishments offering accommodation services operated in Tallinn in 2017 (including 61 hotels), having an average of 7,500 rooms and 15,700 beds for sale. The numbers in rooms and beds that were on sale in accommodation establishments changed across the year according to demand, but the income of accommodation establishments increased every month. Accommodation establishments earned 143 million euros from sale of accommodation services.

International transport connections with Tallinn showed a positive change. A total of 2.64 million travellers passed Tallinn Airport, which is an increase of 19% compared to the previous year. The increase in the number of passengers was affected by the increase in the number of destinations and frequency of flights. 10.5 million passengers were served in Tallinn's Old Harbour, which was a 3% increase compared to the previous year. The number of cruise passengers showed a significant increase. Cruise ships made 311 stops in Tallinn's Old Harbour in a year and 564,280 cruise passengers came to get acquainted with the city. The largest numbers of residents among cruise passengers were from Germany, USA and United Kingdom.

The interest in Tallinn tourist information showed an increase. 328,000 visitors were served in Tallinn Tourist Information Centre (+9%) and the most queries were made about sights, museums and excursions; people also took the city maps. Tallinn tourism information was also given out on Tallinn tourist website, with newsletters and on VisitTallinn accounts on social media. Tourism website was visited 1.78 million times in a year (+13%) and the most information was enquired about sights, events, public transport and diners.

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Table Tourists accommodated in Tallinn 2017*

Country of origin	Accommodated	Change 2016/2017		Bednights	Change 2016/2017		Length of stay
		No	%		No	%	
Albania	357	154	76	777	355	84	2,18
Austria	9272	2083	29	19990	3884	24	2,16
Belgium	12436	4717	61	30625	8035	36	2,46
Bulgaria	2438	873	56	6946	3255	88	2,85
Croatia	1702	630	59	3441	413	14	2,02
Czech Republic	4715	105	2	11322	-196	-2	2,40
Cyprus	879	356	68	1788	676	61	2,03
Denmark	12589	440	4	23192	399	2	1,84
Finland	649663	-40381	-6	996513	-58176	-6	1,53
France	25732	3830	17	57931	8823	18	2,25
Germany	86915	-1415	-2	190953	-4166	-2	2,20
Greece	3851	1351	54	8787	2933	50	2,28
Hungary	4166	773	23	10068	2424	32	2,42
Iceland	1393	483	53	3351	1338	66	2,41
Ireland	4000	733	22	8629	999	13	2,16
Italy	29767	1021	4	65227	-840	-1	2,19
Latvia	55000	719	1	90519	1367	2	1,65
Lithuania	38290	604	2	64942	-8576	-12	1,70
Luxembourg	1369	585	75	2484	800	48	1,81
Malta	1122	623	125	2319	1278	123	2,07
Netherlands	14891	324	2	32612	128	0	2,19
Norway	30827	-1969	-6	66583	-9955	-13	2,16
Poland	21233	1153	6	40860	-694	-2	1,92
Portugal	3275	559	21	8366	1966	31	2,55
Romania	3693	1461	65	9723	2953	44	2,63
Russia	138221	14068	11	270109	28495	12	1,95
Slovakia	2200	514	30	5737	373	7	2,61

Country of origin	Accom- modated	Change 2016/2017		Bednights	Change 2016/2017		Length of stay
		No	%		No	%	
Slovenia	2511	1177	88	4657	1705	58	1,85
Spain	32021	3414	12	89951	22752	34	2,81
Sweden	52410	-1071	-2	83711	-4904	-6	1,60
Switzerland	10461	930	10	20970	1852	10	2,00
Turkey	6547	78	1	15710	639	4	2,40
Ukraina	11687	1551	15	26182	4705	22	2,24
United Kingdom	49329	8572	21	109871	20580	23	2,23
South Africa	430	112	35	1083	215	25	2,52
China	16302	3976	32	25367	3636	17	1,56
Japan	27360	4407	19	42473	5360	14	1,55
South-Korea	13726	2288	20	17068	3038	22	1,24
United States	33574	191	1	73486	-8147	-10	2,19
Canada	4143	375	10	8887	179	2	2,15
Brasil	3408	513	18	5779	-1060	-15	1,70
Australia	6333	351	6	12963	415	3	2,05
Other countries	63306	10349	20	120894	18261	18	1,91
Total foreign tourists	1493544	31607	2	2692846	57517	2	1,80
Total Estonian residents	234885	16766	8	406256	44429	12	1,73
Grand total	1728429	48373	3	3099102	101946	3	1,79

* Due to monthly correction of data by Statistics Estonia the figures in the above chart may change over time