

Tallinn Tourism in 2013

Tallinn Tourism 2013 in figures

More than half the tourists to Estonia visited Tallinn

2.98 million tourists stayed overnight in Estonian accommodation establishments in 2013 and 52% of them stayed in Tallinn.

Tourists in Tallinn: 1,561,700 (+3%)¹

Bednights in Tallinn: 2,802,100 (+2%)

Market shares of three biggest markets increased

Finland: 42% (648,900 tourists)

Russia: 13% (204,200 tourists)

Estonia: 11% (172,600 tourists)

Germany: 5% (70,800 tourists)

Sweden: 3% (52,000 tourists)

Latvia: 3% (45,000 tourists)

United Kingdom: 2% (37,600 tourists)

Norway: 2% (31,700 tourists)

Total other countries: 19% (298,900 tourists)

Important primary markets developed in different directions

Finland: 974,600 nights (+3%)

Russia: 417,500 nights (+13%)

Estonia: 294,000 nights (+12%)

Germany: 153,600 nights (-7%)

United Kingdom: 87,500 nights (-23%)

Sweden: 87,000 nights (-8%)

Norway: 74,900 nights (-20%)

Latvia: 70,100 nights (0%)

Majority of the tourists came for a holiday

Visits by foreign tourists divided as follows: 75% holidays, 19% business, 3% conferences and 2% other purposes. As for domestic tourists, 60% travelled for holiday purposes, 33% for business, 4% visited conferences and 3% travelled for other purposes.

No significant change in number of accommodation establishments, price of accommodation itself increased

In Tallinn, the total number of accommodation establishments was 324. In total, they had 7,334 available rooms and could accommodate 14,914 guests. The annual average occupancy rate of rooms was 62% and there was no change in this indicator on a year-on-year basis. The average

price for a night was 39 euros, which was 5% more than in the previous year.

Tallinn's tourism revenues increased

Foreign guests spent an estimated 850 million euros (+5%) on various goods and services in Tallinn. Accommodation establishments in Tallinn earned 107 million euros (+7%) on sales of accommodation services and cruise passengers spent an estimated 30 million euros during their visits to the city.

Length of stay shortened

The average duration of the stay of tourists in Tallinn was 1.79 nights (-1%).

Trips by foreign tourists: 1.81 nights (-2%)

Trips by domestic tourists: 1.70 nights (+1%)

Number of air passengers decreased, number of ship passengers increased

1.96 million passengers (-11%) in total were served at Tallinn Airport. Regular flights were made to 24 destinations over the year. The largest number of passengers were served on Frankfurt, Helsinki and Riga flights. 9.2 million passengers (+4.5%) travelled through the Old City Harbour of Tallinn. 82% of them travelled on the Finland route, 10% on the Sweden Route, 2% on the Russia route and 6% were cruise passengers. Cruise ships made 330 visits to the Old City Harbour during the year and 519,000 cruise passengers went on a tour of the city. Cruise passengers divided as follows by origin: 24% from Germany, 19% from the US, 17% from the UK, 6% from Spain and 34% from the remaining 149 countries.

Number of visits to Tallinn Tourist Information Centre increased

The Tourist information centres of Tallinn served 159,100 visitors (+5%). 94% of them were citizens of foreign countries. The majority of the visitors served were from Russia (32,000), Germany (19,700) and Finland (14,100). Tourist information about Tallinn was also given on the Tallinn Tourism Portal, in the Tallinn Photo Bank, in mobile applications and on the social media accounts of VisitTallinn. The Estonian Tourism Portal was visited 1.61 million times (+15%) during the year. Most of the browsers came from Finland (24%), Russia (15%), the UK (4%) and Sweden (4%).

¹ Compared to accommodations statistics for 2012

Introduction

2013 was another record year in Tallinn tourism. The summary of tourism statistics prepared by Tallinn City Tourist Office & Convention Bureau contains the most important tourism numbers and trends as well as the factors that influence the tourism numbers the most.

According to the overview, foreign visitors visited Tallinn ca. three million times, 1.56 million tourists stayed in the capital's accommodation facilities, the majority of guests came to Tallinn for a holiday and foreign guests consumer goods and services for an estimated 850 million euros.

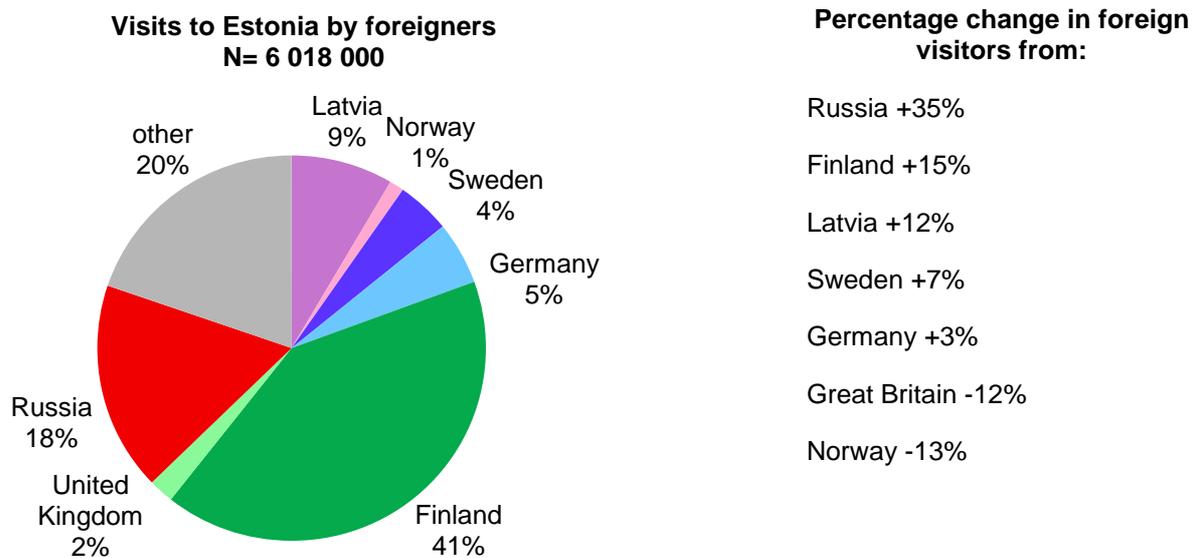
The summary also gives:

- the number of foreign guests who visited Tallinn;
- the number and countries of origin of the tourists who stayed in Tallinn's accommodation establishments;
- the purposes why tourists visited the city;
- the seasonal division and duration of visits;
- figures of the accommodation market (incl. number of accommodation establishments and cost of accommodation services);
- estimates of the amounts spent by foreign guests in Tallinn; the number of visits to Tourist Information Centres and tourist information channels;
- and the number of passengers served in the Old City Harbour of Tallinn and Tallinn Airport.

The tourism statistics were prepared on the basis of the accommodation statistics of Statistics Estonia; the statistics of the Bank of Estonia, Tallinn Airport and Port of Tallinn; the TourMIS and Tallinn tourism statistics databases and the results of the surveys carried out over the year.

Visitors of Tallinn

In 2013 there were a total of 6 million visits to Estonia by foreigners according to the Bank of Estonia². The number of foreign visitors was 13% higher than a year earlier. The number of visitors from Russia increased the most in 2013, i.e. by 35% - they visited Estonia more than a million times, which is 18% of all visits. The number of visitors from Finland (+15%) and Latvia (+12%) also went up. The number of people who travelled to Estonia from most European countries (e.g. the United Kingdom, Italy and Spain) decreased compared to 2012. Half of foreign visitors stayed overnight in Estonia and those whose trip lasted for several days spent 4 days over here on average.

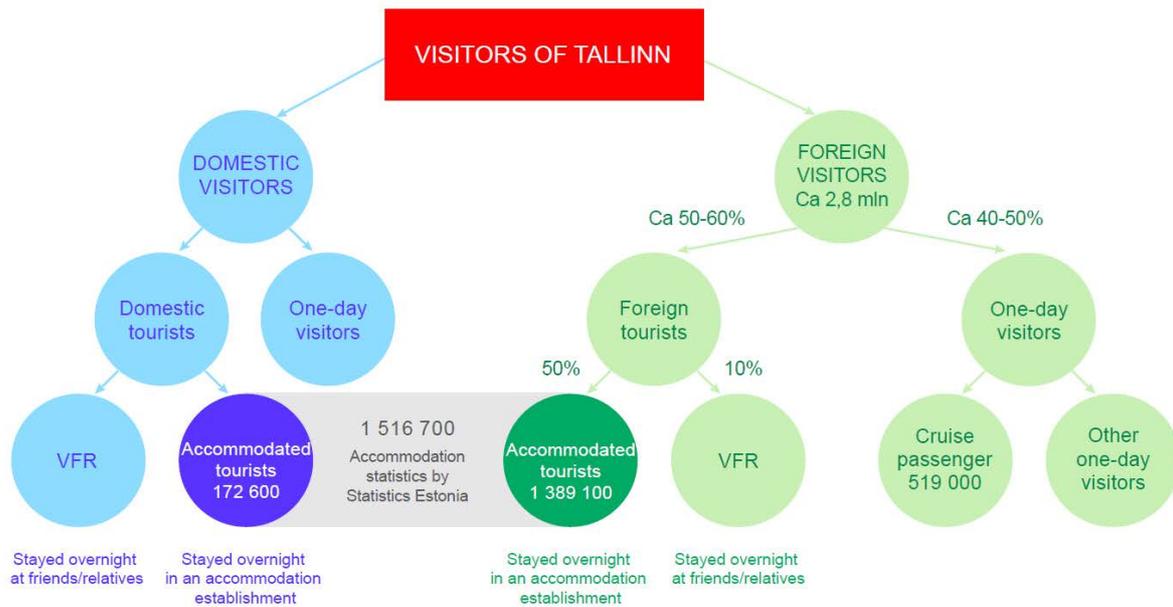


Source: Bank of Estonia

Based on the survey of foreign visitors of Tallinn and the accommodation statistics of the Bank of Estonia and Statistics Estonia, we can assume that ca. half of the foreign guests of Estonia visited Tallinn during their travel.

This means that foreign tourists visited Tallinn ca. three million times in 2013. Approximately half of them travelled to Tallinn for several days and 1.39 million used the services of accommodation establishments in Tallinn.

² <http://www.eestipank.ee/en/press/estonians-travelled-more-widely-2013-14022014>



Source: Tallinn City Tourist Office & Convention Bureau

Tallinn accommodation establishments

There were 324 registered accommodation establishments in Tallinn as at 1 October 2013, including 55 hotels, 11 guesthouses, 17 hostels, 226 guest apartments, 12 bed and breakfasts and 2 holiday houses, 1 holiday village and holiday camp. 7,334 rooms with 14,914 beds and 220 places in caravans were on sale in total.

The majority of accommodation establishments in Tallinn are guest apartments, bed and breakfasts and guesthouses, but the majority of available rooms are in hotels. According to Statistics Estonia, the majority of the tourists who stayed in accommodation establishments in Tallinn (90%) spent the night in a hotel. The number of accommodation establishments decreased by a tenth compared to the previous year, but the number of available rooms did not change significantly (-3%). **There were also no significant changes in the structure of accommodation service providers in comparison to the previous year.**

In 2013 the accommodation market of Tallinn was characterised by an increase in prices, increase in revenue from sales of accommodation services and increase in revenue per available room (RevPAR). **The seasonality of tourism had a relatively small impact on the changes in accommodation volumes of accommodation establishments in Tallinn, although the occupancy rate in the busiest month was ca. twice as high as in the lowest month.**

Table 1 Accommodation establishments in Tallinn 2009-2013

Accommodation establishments	2009	2010	2011	2012	2013	Change 2012/2013	
						Change in No	%
No of accommodation establishments	342	363	358	353	324	-29	-8%
Incl. No of hotels	57	58	58	57	55	-2	-4%
No of rooms in accommodation establishments	7 540	7 607	7 577	7 561	7 334	-227	-3%
Incl. No of rooms in hotels	6 495	6 533	6 513	6 523	6 363	-160	-3%
No of beds in accommodation establishments	15 250	15 378	15 377	15 040	14 914	-126	-1%

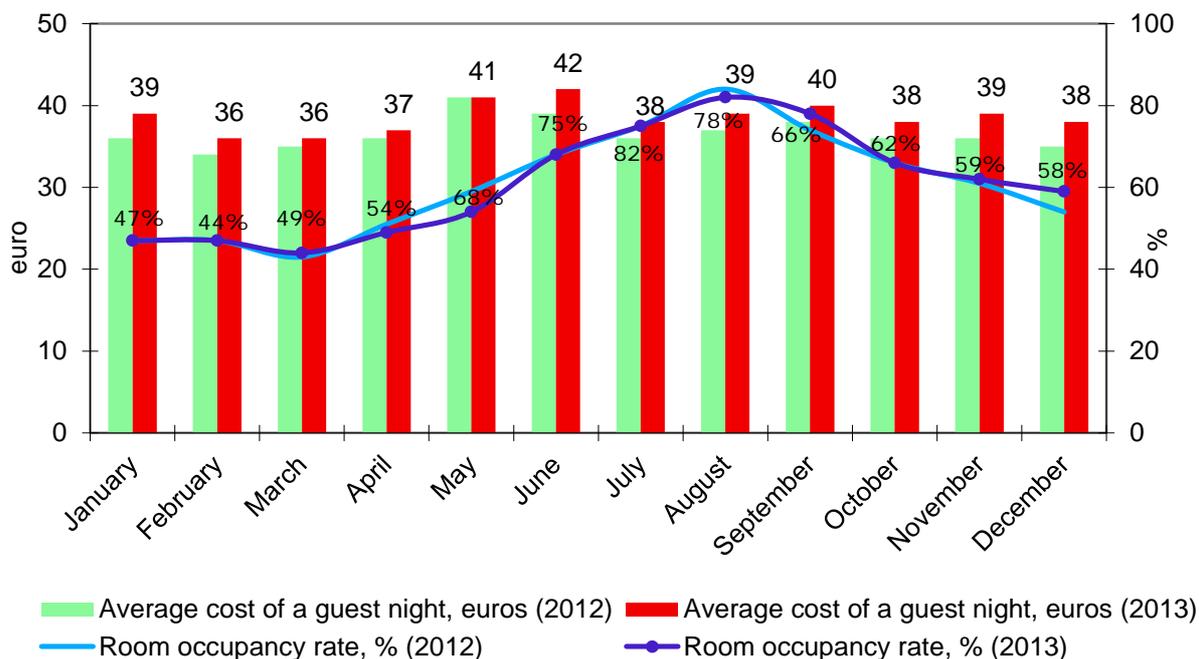
Source: Tallinn City Tourist Office & Convention Bureau

The average room occupancy rate in the accommodation establishments of Tallinn last year was 62% and there was no change in the rate compared to 2012, but the increase in occupancy outside the tourist season continued to increase. **The room occupancy rates in the first half of 2013 was somewhat lower than in 2012, but in the second half of the year it was higher than in the previous year. Room occupancy rates changed by a couple of percentage points across the months.** The room occupancy rate was the highest in July with 82% of available rooms occupied and the lowest (44%) in February. The occupancy rate increased the fastest in November and decreased the most in April. Since the structure of the people who visited the capital changed by target countries changed in 2013, it helped increase the occupancy rate of accommodation establishments in the first three months and in the last quarter of the year.

The average price³ for a night in 2013 was 39 euros, which was 5% more than in the previous year. The average price of a room started increasing in the second quarter of 2011 and continued in both 2012 and 2013. However, the price increase in the last quarter of 2013 was slower than in previous months. Comparing the accommodation prices to previous year indicates that prices were higher in almost all months on a year-on-year basis. The biggest price increase of the year occurred in December when the cost of accommodation rose by 9%. In May, prices remained at the same level as in the previous year. The percentage by which accommodation prices increased were relatively low in most months (5-6%). Accommodation prices were relatively even throughout the year – the price was the lowest in February and March (36 euros on average) and the highest during the busiest months of business travel (41 euros in May, 42 euros in June and 40 euros in September).

³ The average cost of one guest night in all types of accommodation establishment, includes value-added tax and the cost of breakfast if it is sold with accommodation services.

Average cost of a guestnight and room occupancy rate in Tallinn



Source: Statistics Estonia

The increase in accommodation prices contributed to the increase in revenue per available room (RevPAR) and the increase in the income of accommodation establishments from sales of accommodation services. The income earned on sales of accommodation services grew the most in August (+15%) and the least in April (-10%). In 2013 the accommodation establishments of Tallinn earned a total of 108 million euros on sales of accommodation services and their income increased by seven percent in comparison to the previous year.

Tourists staying in Tallinn’s accommodation establishments

2013 was positive for tourism businesses in Europe – the number of guests went up and revenue from tourism increased. The markets with the biggest growth were Russia (+12%), France (+5%) and Sweden (+4%). The growth figures of city tourism⁴ were higher than the average of European countries. Overnight stays in the accommodation establishments of European cities increased by 3% on average in 2013. Similar to the previous three years, the number of trips with overnight stays by foreign tourists guaranteed the growth. London, Paris, Berlin, Rome and Barcelona are still the most popular tourist cities in Europe. The fastest growing target markets were China (+14%) and Russia (+12%). According to the European tourism database TourMIS, Tallinn stands out among other European cities as a destination with a high number of overnight stays by foreign tourists.

⁴ www.tourmis.info.

2.98 million tourists stayed overnight in Estonian accommodation establishments in 2013 (+5%). 65% or 1.94 of them were residents of foreign countries (+4%) who spent 3.91 million nights in Estonia (+2%). 1.04 million Estonians stayed in accommodation establishments during the year (+8%) and the number of nights totalled 1.82 million (+6%). This was a record year for Estonian accommodation establishments in terms of the number of guests and overnight stays for the third year on the run.

Half of the tourists (51%, 1.56 million in total) who stayed in accommodation establishments stayed in the accommodation establishments of Tallinn. **The number of foreign guests who stayed overnight in the accommodation establishments in Tallinn totalled 1,389,100 (+2%) and the number of Estonians was 172,600 (+10%),** Compared to 2012, the total number of overnight guests (both foreign and domestic tourists) increased by 3% or by 45,500 tourists. This means that 72% of the foreign tourists who visited Estonia stayed overnight in the accommodation establishments of Tallinn and 17% of domestic tourists did the same. The majority of foreign tourists who visit Estonia and stay overnight stop in Tallinn.

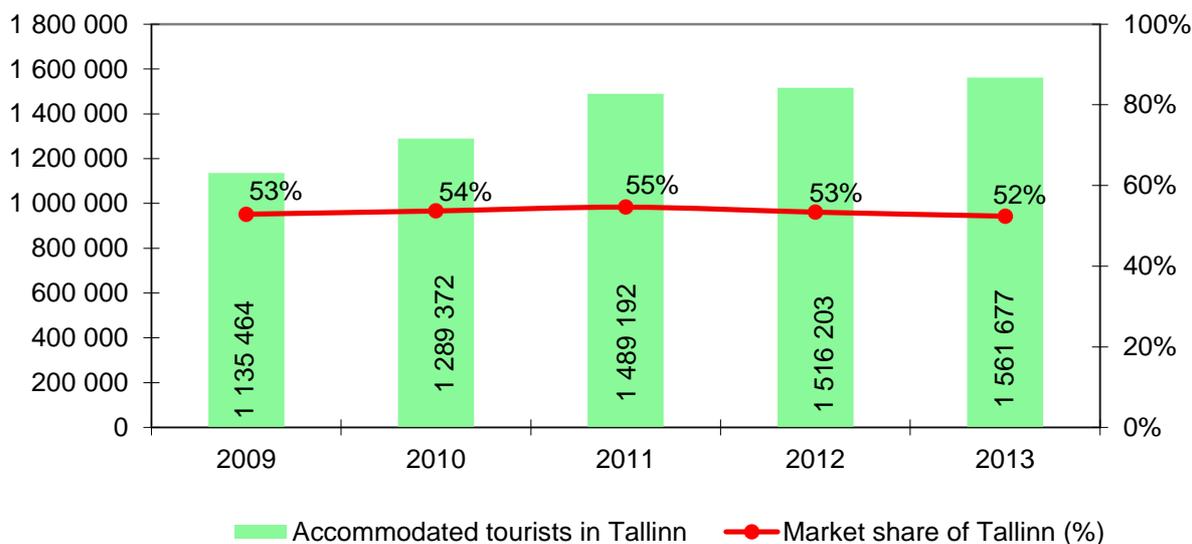
2013 was the fourth year in a row when a record number of visitors stayed overnight in the accommodation establishments in Tallinn. The number of Estonians and foreigners alike who stayed in accommodation establishments increased. The changes in the travel of domestic tourists and foreign tourists by months moved in different directions. **The number of Estonians who stayed in accommodation establishments increased from January to November, the number of foreign tourists changed in different directions in different months.**

The number of domestic tourists increased by a tenth over the year. The number of trips by domestic tourists increased the most in August (+35%) and the December was the month of the biggest decrease (-4%). The increase in domestic tourism resulted from the increase in the economic security of the Estonian people⁵. The number of trips by domestic tourists increased the most in the holiday segment.

The number of trips by foreign tourists increased by two percentage points in total, i.e. by 29,300. The number and composition of foreign visitors was influenced primarily by changes in flight routes, flight frequency and destinations. In five months of nine, the number of foreign visitors who stayed overnight was higher than in the previous year and the number of foreign visitors in accommodation establishments increased the most in August (+11%). The number of foreign visitors was lower than previously in three months and the decrease was the biggest in April (-13%). July is the top month in terms of foreign visitors and the number of those who stayed overnight in Tallinn was the same as the year before. The number of foreign tourists increased the most in the conference segment (+30%).

⁵ www.ki.ee.

Accommodated tourists in Tallinn in proportion to all the tourists in Estonia, 2009-2013



Source: Statistics Estonia

272,200 tourists stayed in the accommodation establishment of Tallinn in the first quarter (+5%). The number of domestic tourists increased by 12 percent and the number of foreign tourists by 3 percent. The majority of the increase in the number of tourists occurred on the account of the two largest foreign markets: the Finnish market increased by 15% (+13,900 tourists) and the Russian market (+10% or +5,000 tourists). New Year's Eve parties and Orthodox Christmas brought foreign tourists here in January. Traditional festivals (*MustonenFest*, *Tallinna Talvefestival*) increased the number of visitors in February. BMX and skateboarding contest *Simpel Session*, Easter and spring holidays in schools brought foreign visitors in March.

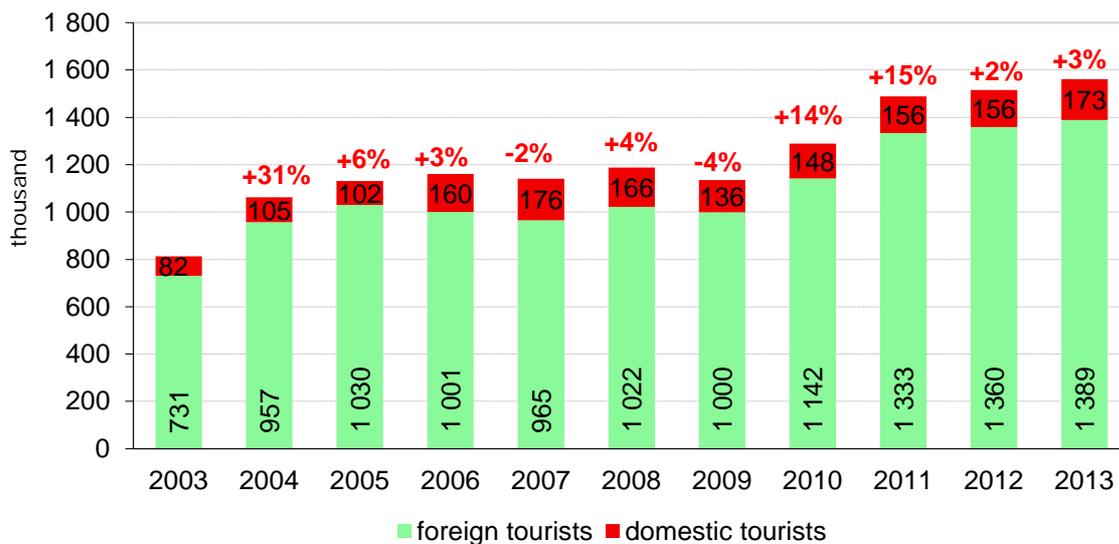
The number of tourists decreased by one percentage points in spring, in the **second quarter**; the increase in the number of domestic tourists continued (+11%), but the number of foreign visitors decreased (-7%). Traditional events such as *Jazzkaar*, *Old Town Days*, *Nargenfestival*, *Tallinn Treff*, *Tallinn Guitar Festival* were more popular with domestic tourists last year. **International conferences** such as *INTOSAI Environmental Auditing*, *International Conference on Cyber Conflict*, *International Oil Shale Symposium*, etc., increased the number of foreign business and conference tourists considerably in spring.

The number of tourists who stayed overnight increased in the third quarter (+4%) and the domestic market grew the fastest again. In the third quarter, the number of foreign visitors increased by 3 percent and the number of domestic tourists by 18 percent. August was the month of the biggest growth. Summer events such as the *Õllesummer Beer Festival*, *Tallinn Medieval Days*, *Maritime Days*, *Nargenfestival*, *Birgitta Festival*, *jubilee of the Estonian National Opera building*, *U20*

European Championships in Basketball, Finn Sailing World Championships, the Estonian-Holland football match attracted visitors of the city. The concert of Robbie Williams, which brought 60,000 listeners to the Tallinn Song Festival Ground, was the music event that attracted the most visitors. The sports event that attracted the most foreign visitors was the SEB Tallinn Marathon, which had 22,000 participants from 43 countries.

The number of tourists also increased by four percent in the **last quarter of the year**, but unlike the previous quarter the increase in domestic tourism was smaller than in foreign tourism. There were no major events that could've influenced the number of visitors. Concerts (*Tribute to Michael Jackson, Hurts, Scorpions, White Gospel, Vaya Con Dios, The Music of ABBA, etc.*), festivals (*Black Nights Film Festival, Christmas Jazz*), trade fairs (*St Martin's Day Fair, Child & Family*) and exhibitions (*Gingerbread Mania, Titanic*) and Tallinn Restaurant Week, which attracted both foreign visitors and domestic ones, contributed to the increase in the number of visitors. A bigger increase in the number of Finnish and Russian tourists than in the previous year could be noted in the last months of the year.

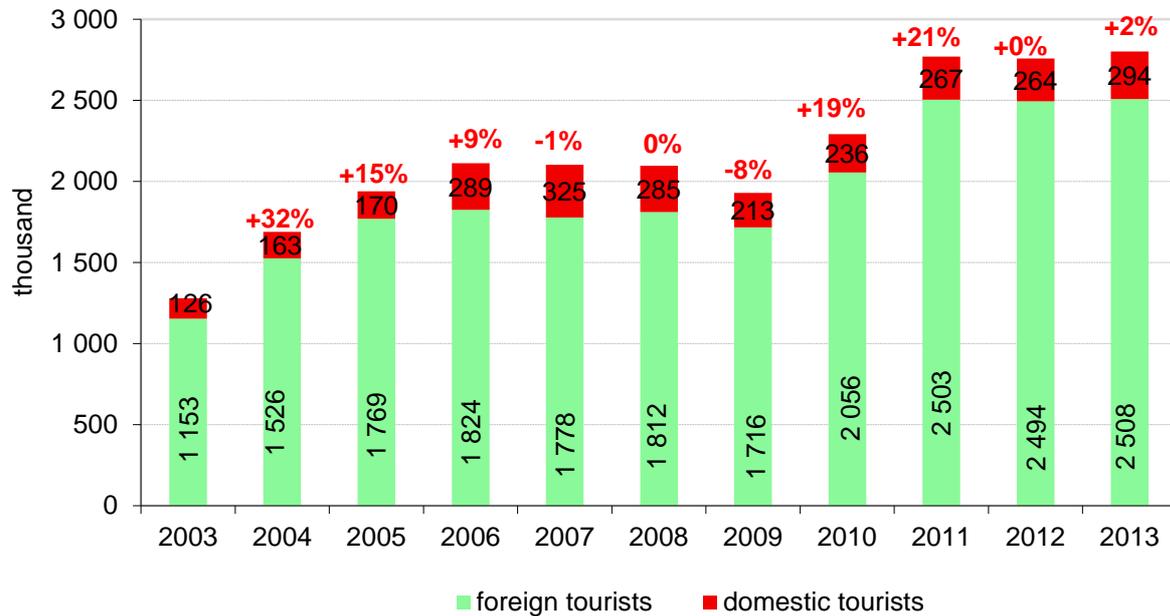
Tourists staying in Tallinn's accommodation enterprises, 2003-2013



Source: Statistics Estonia

The number of overnight stays increased by two percentage points over the year. **2.80 million nights in total were spent in the accommodation establishments of Tallinn.** The number of overnight stays of foreign tourists remained at the same level as in the previous year (+1%), the number of overnight stays by domestic tourists increased by a ninth. In total, foreign tourists spent 2,508,100 nights and Estonians spent 293,700 nights in the accommodation establishments of Tallinn. When we analyse the overnight stays by tourists by months, we see that the number of overnight stays by tourists compared to the previous year increased primarily during the 'low' season and growth was the fastest in the second half of the year.

Bednights spent in accommodation enterprises in Tallinn 2003-2013

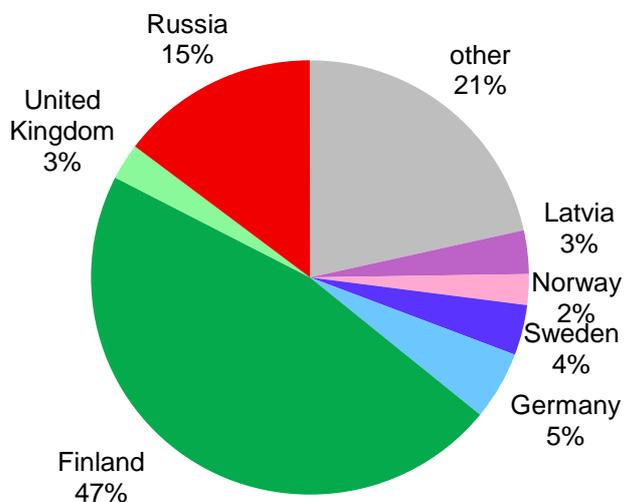


Source: Statistics Estonia

Important foreign markets of Tallinn

The foreign tourists who arrived from the **main target markets of Tallinn** (Finland, Sweden, Germany, the United Kingdom, Norway, Russia and Latvia) comprised 79% of the foreign tourists who stayed in accommodation establishments. The shares of foreign markets changed relatively much during the year. The market share of Finland grew by four and the share of Russia grew by one percentage points. The market shares of Latvia and Sweden did not change. The share of other foreign countries decreased by two, the share of the United Kingdom, Norway and Germany by one percentage point.

Foreign tourists in Tallinn's accommodation establishments 2013



Change in foreign tourists from:

Russia +11% (+20 800)
Finland +10% (+59 100)
Latvia -3% (-1 200)
Sweden -8% (-4 800)
Germany -10% (-7 900)
Great Britain -22% (-10 700)
Norway -25% (-10 600)

Source: Statistics Estonia

The biggest number of foreign tourists who stayed in accommodation establishments came from **Finland** (47%). The number of Finns who stayed in accommodation establishments increased by a tenth, but their overnight stays only increased by three percent. The trend that started in the second half of the previous year continued: there were many Finns among the tourists, but their trips were short.

648,900 Finns in total stayed in the accommodation establishments of Tallinn during the year (+10% or 59,100 more tourists) and the total number of the nights they spent here was 974,600 (+3% or 27,800 more nights). The biggest number of Finnish tourists came in summer and their interest in visiting Tallinn is the smallest in the beginning of the year. In other months, the number of Finnish tourists in Tallinn was influenced by the events in the city and the special offers made by accommodation establishments and shipping companies. The number of visitors from Finland increased in most months. The number of visitors increased the most in summer months (+10% in June, +12% in July and +27% in August). The decrease was the biggest in April (-10%).

The number of passengers travelling on the Finland route increased by 4%, which indicates that the number of one-day visits and short cruises by Finnish residents was higher than in the previous year. According to the Eurobarometer⁶ survey, the number of foreign trips by Finnish residents remained at the same level as in the previous year. Most trips with overnight stays were short (69% of them shorter than three nights) and ca. one-third (31%) of holiday trips were city breaks.

⁶ ec.europa.eu/public_opinion/flash/fl_392_en.pdf.

The increase of the **Russian market** continued in 2013, but the growth percentage was smaller than in the previous years. The share of Russia among the foreign markets of Tallinn increased by one percentage point. Russian tourists comprised 15% of all foreign tourists who were accommodated for the night. 204,200 Russian tourists stayed in the accommodation establishments of Tallinn and the total number of nights they spent here was 417,500.

The number of Russian tourists increased in most months and the growth figures were highest in the autumn and winter period. The percentage of growth was the highest in February (+30%) and in October-November (+18%). The number of tourists decreased in June (-8%) and the number in July was the same as in 2012. The biggest number of tourists from Russia arrived in January and December (55,000 or 27% of all tourists for the year). The number of one-day tourists from Russia probably increased the most among the people visiting Tallinn, as winter cruises brought 11,400 people to Tallinn in the beginning of the year⁷.

The share of the **German market** in Tallinn was 5%. This market was in decline for most of 2013. The number of overnight stays by German tourists increased until the previous year, but changes in flight connections reduced their number in 2013. However, the number of German cruise passengers continued to increase. 70,800 German tourists visited Tallinn in the year and they spent 153,600 nights in accommodation establishments. The number of tourists decreased by 10% and the number of overnight stays by 7% compared to 2012. Germans prefer to visit Tallinn in the summer period (from May to September). The number of both tourists and overnight stays increased in most months (except October and November). The biggest number of German tourists stayed in the accommodation establishments of Tallinn in August (13,800) and the decrease was the biggest in spring months (March-May, 25% fewer overnight stays than in the previous year).

Visits by German tourists were longer than in the previous year (2.17 nights). The main reason behind the decrease in the German market in Tallinn was the decrease in the number and frequency of flight connections. The number of foreign trips by Germans increased in 2013 and the average number of German tourists in European cities increased by 5%⁸.

The developments on the Swedish market were similar. The number of foreign trips by Swedish residents increased by 4% compared to the previous year and a fifth of their holiday trips were city breaks. **The decrease of the Swedish market in Tallinn continued.** 52,000 Swedish tourists in total stayed in the accommodation establishments of Tallinn, i.e. 8% or 5,000 fewer tourists than in the previous year. In total, Swedish residents spent 87,000 nights in Tallinn, which was 8,100 fewer nights than in the previous year (-8%).

Both **British** and **Latvian** tourists comprised 3% of the foreign tourists who visited Tallinn and both

⁷ <http://www.ts.ee/uudised?art=305>.

⁸ <http://www.tourmis.info>.

markets demonstrated a decrease. The **United Kingdom** was the one that decreased the most among the target markets of Tallinn in 2013. The UK market has been the most affected by changes in flight connections, airlines, destinations and the significant decrease in flight frequencies. Compared to 2012, the number of direct flights and destinations decreased even further. 37,600 British tourists stayed in the accommodation establishments of Tallinn (-25%) and the total number of nights they spent here was 87,500 (-23%). The flights of budget airlines to Tallinn play a deciding role in the further development of the UK market. An increase in the number of flight connections should stop the decrease. According to the most recent Eurobarometer survey, 14% of the holiday trips of Brits were city breaks and the number of trips by Brits to European cities with overnight stays increased by 5%.

The economic security of the residents of **Latvia** increased in 2013⁹, which also made them travel more. The Latvian market in Tallinn resembled that of 2012. The number of Latvian tourists decreased by 3% (45,000 tourists in total), but the number of overnight stays did not change (70,000 nights in total). Trips by Latvian tourists divide rather evenly by months and they are the most influenced by cultural and sports events.

The one with the smallest share among the primary markets of Tallinn is Norway (2%) and this market was also in decline. The number of Norwegians who stayed overnight and the number of overnight stays both decreased in all months of the year. Changes in the number of regular flights were the main reason of the change. 31,700 tourists (-23%) arrived from Norway and they spent 74,900 nights in the accommodation establishments of Tallinn (-20%).

The target markers of secondary importance for the tourism marketing of Tallinn (Belgium, Spain, Italy, France, the United States) were also in decline in 2013, but the Asian markets grew faster than the average.

The economy of Southern European countries is starting to recover slowly. However, the number of trips abroad by Italians and Spaniards to Tallinn continued to decrease and the trend was the same in most other European cities¹⁰. The number of visits from these countries to Tallinn is seasonal and they mostly come here in summer. Many Spaniards and Italians visit Tallinn as cruise passengers and their number increased compared to the previous year, The number of accommodated tourists from Spain decreased by a tenth, but the number of overnight stays increased by two percentage points. The number of visits by **Italian** citizens to Tallinn is also decreasing. The number of Italians who stayed in accommodation establishments decreased by 16% and the number of the nights they spent here by 12%. As for other European cities, the overnight stays of Spaniards decreased by seven and the overnight stays of Italians decreased by two percentage points on average.

⁹ http://ec.europa.eu/public_opinion/flash/fl_392_en.pdf.

¹⁰ According to the TourMIS database, the number of tourists and overnight stays in European cities increased by three percentage points in 2013. The number of foreign tourists increased by five and the number of domestic tourists by two percentage points. The number of overnight stays decreased by 7% in the case of Spaniards and 2% in the case of Italians.

The French market was also in decline in Tallinn, but trips by the French to other European cities increased by three percent. The number of French tourists decreased by six and overnight stays by five percent. The total number of tourists who stayed in the accommodation establishments of Tallinn was 17,800 and the number of nights they spent here was 43,500. The number of **Belgian tourists** in the accommodation establishments of Tallinn decreased by a tenth and the number of nights they spent here decreased by 13%. The total number of Belgian tourists who spent the night in the accommodation establishments of Tallinn was 6,000 and they spent 13,000 nights in total over here. Many Belgians travel here to attend conferences and the number of large international conferences held here in 2013 was smaller than in the previous year, so this explains some of the decline of this market.

There were also fewer trips with overnight stays by **US** citizens – the number of tourists and their overnight stays both decreased by about a tenth. The total number of US tourists who stayed in the accommodation establishments of Tallinn was 23,600 and the number of nights they spent here was 54,500. The decrease was the biggest in December, when the number of US tourists who stayed in accommodation establishments increased by 32%. The decrease was the biggest in July (-28%). Also, the number of US citizens among cruise passengers increased compared to the previous year. The number of US tourists who visited other European cities in 2013 was four percent higher on average.

The number of tourists from **Asia** increased by a fifth (+22%) compared to 2012, but their trips were shorter than in the previous year. The number of tourists from **China** increased by a third (6,800 tourists in total) and their overnight stays increased by 50% (13,700 nights in total). The number of tourists from **Japan** increased by a fourth and they were mostly interested in travelling to Tallinn in summer. Both the number of tourists who stayed overnight (9,900 tourists in total, +23%) and the number of overnight stays (17,000 nights in total, +24%) increased by ca. one-fourth. The number of trips with overnight stays by Chinese tourists to European cities increased by 14% and trips by Japanese tourists decreased by one percentage point.

Seasonality of trips and duration of stays by tourists in Tallinn

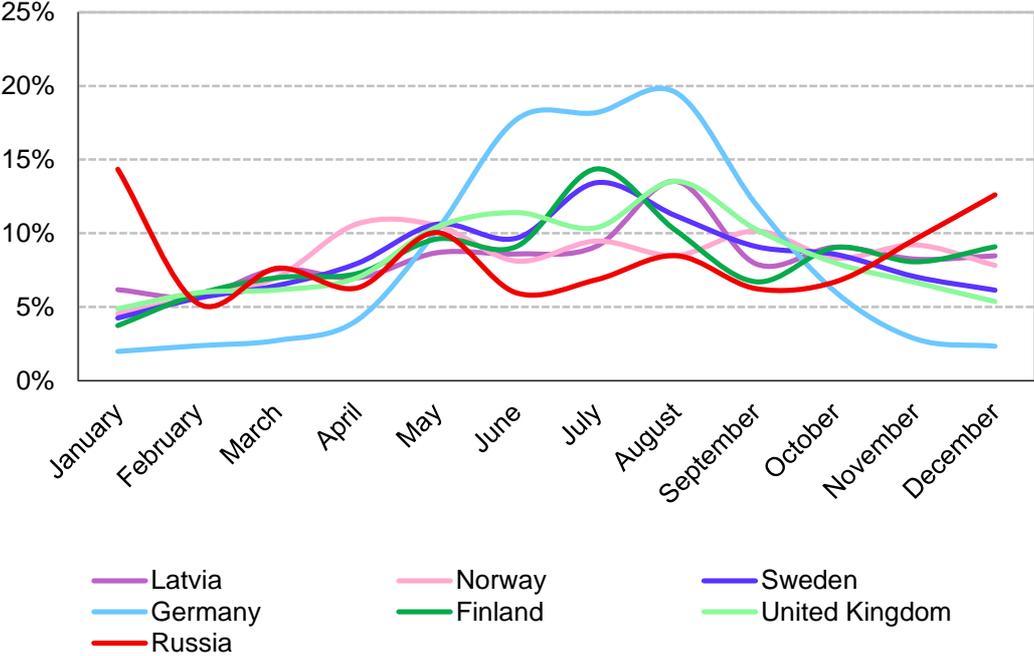
The trips of foreign tourists to Tallinn don't spread evenly across the year. The majority of the tourists who use the services of accommodation establishments come here from May to October. More than a third (35%) of all tourists who visit the city in the year are served in accommodation establishments in the three summer months.

A comparison of Tallinn with other European cities indicates that on average, visits to Tallinn are more unequally spread and shorter. The seasonality of trips to the city decreased compared to 2012 and the Gini coefficient of the tourists who visited Tallinn did not change (0.159)¹¹. The increase in the number

¹¹ The Gini coefficient indicates the inequality of the spread. In tourism, the Gini coefficient indicates the inequality of the spread of tourists (or overnight stays) across the year. If the Gini coefficient is

of visits from Russia and other CIS countries contributed to this decrease in seasonality. Looking at seasonality by the important foreign markets of Tallinn, then visits by German and Russian tourists spread the most unequally. More than half (58%) of trips by German tourists take place in the three summer months, a fourth (25%) of Russian tourists visit Tallinn in December and January. The Finns, Brits and Swedes also travel here mostly in summer. Visits by Latvians spread the most equally across the year. Seasonality in trips by Norwegians is relatively small.

Seasonality of tourists staying in accommodation enterprises



Source: Statistics Estonia

The average duration of a trip to Tallinn decreased during the year. The average duration of the stay of tourists in Tallinn in 2013 was 1.79 nights (-1%). The longest trips were made in January (2.11 nights) and the shortest ones in November (1.72 nights).

Changes in the average duration of trips by domestic tourists were bigger than changes in trips by foreign tourists, but the average annual change in the duration of trips was similar (+1% or 1.70 nights). Trips by domestic tourists were the longest in March, September, October and November. In other months, their trips were equally as long or shorter than in previous years. The month where trips by domestic tourists lasted the longest was September (1.86 nights) and trips were the shortest in December (1.55 nights).

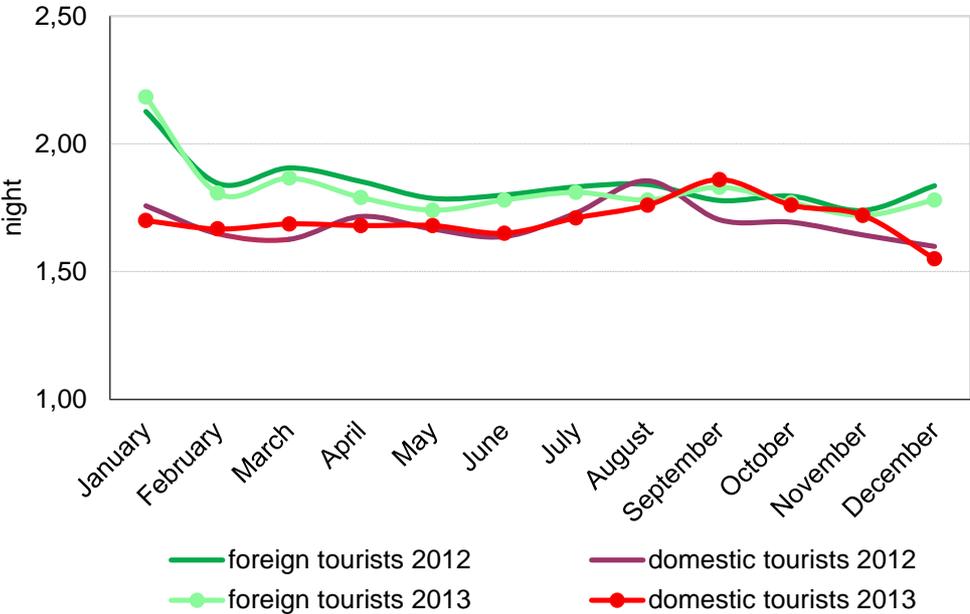
one, then tourists arrive in only one month of the year. If the Gini coefficient is one, then the same number of tourists arrive every month of the year.



The average duration of foreign tourists who stayed in accommodation establishments shortened by 2% from 1.88 nights to 1.83 nights. The longest trips by foreign tourists were made in January (2.18 nights) and the shortest ones in November (1.72 nights). The trips of foreign tourists in January are longer than the average as a result of the long winter holidays of Russian tourists and short city breaks by people from neighbouring countries have a big impact in November. Trips by foreign tourists remained shorter in most months of the year. City breaks were longer only in January and September. The biggest decrease occurred in August. The reason why trips in August decreased is the concert of Robbie Williams, which attracted many foreign visitors to just one event (i.e. one night).

The duration of visits by tourists from primary target markets changed in different directions. Finns made the shortest visits (1.5 nights) and their trips were also shorter than in previous years. Latvians spent 1.56 nights in Tallinn on average. Germans stayed for 2.17 and Russians for 2.04 nights, i.e. their trips were longer than in the previous year. The average duration of trips by the Swedes did not change (1.67 nights). According to primary target markets, Norwegians stayed the longest in Tallinn in 2013 (2.36 nights) and their trips were seven percent longer than in the previous year. They were followed by the Brits with 2.33 nights – the average duration of their trips decreased by one percentage point. The biggest difference in the duration of trips by months is evident in trips by Russian tourists – their winter trips are considerably longer (2.76 nights in January) than in other months (e.g. 1.82 nights in April).

Length of stay of tourists in Tallinn 2012-2013



Source: Statistics Estonia



Purpose of visit

The purpose of the city break can only be observed in regard to the people visiting Tallinn who stay in accommodation establishments¹², so the analysis that follows only covers the tourists that stayed in the accommodation establishments of Tallinn.

The **1,561,700 tourists** who stayed in the accommodation establishments of Tallinn in 2013 divided as follows in terms of the purpose of their visits: **73% (1,144,600) tourists were here on holiday, 21% (383,200) on business, 4% (56,900) attended conferences and 2% (33,900) travelled for another reason (studies, health, etc.).**

There were no significant changes in the division of travel purposes compared to 2012. Only the number of persons travelling to work meetings was smaller than in the previous year. There were more holiday travellers, people attending conferences and seminars and people visiting the city for other reasons than the year before. Tallinn hotels hosted 22,800 holiday travellers (+2%), 12,200 conference travellers (+27%) and 17,000 people travelling for other reasons (+100). The number of business travellers decreased by 7,200 (-2%).

The majority (75%) of foreign tourists came to Tallinn for holiday. 20% of the people who used accommodation were business travellers and 3% attended conferences and seminars. A small part (2%) of tourists stayed in accommodation establishments when travelling for other purposes. The number of foreign tourists travelling for all purposes increased in comparison to the year before: the number of holiday travellers increased by 1%, the number of business travellers by 2% (incl. the 30% increase in the number of conference tourists) and the number of tourists travelling for other reasons increased by 119%.

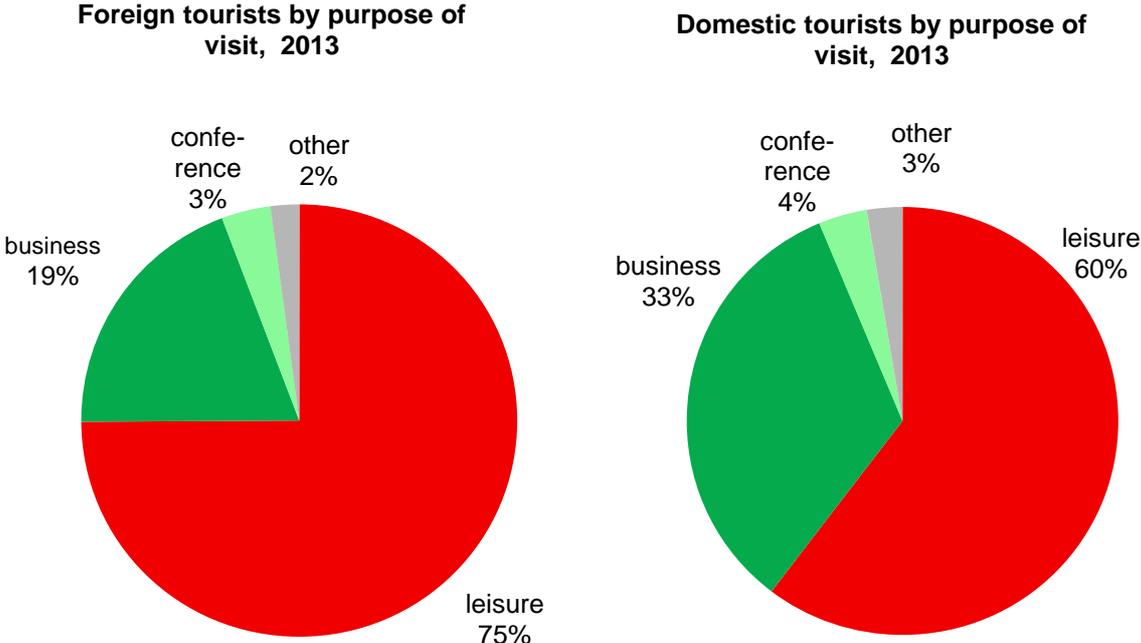
According to months, the share of holiday travellers was the biggest in July (80% of all foreign tourists who travelled here in July) and the share of business trips was the highest in October (29% of all trips). The biggest number of foreign tourists attended conferences in September and October (6% of visitors came here to attend a conference).

Every sixth **domestic tourist** in ten (60%) stayed in an accommodation establishment of Tallinn in relation to holidays. Business trips comprised 37% of trips to the city (incl. business trips comprised 33% and conference trips 4% of all trips). Visits for other purposes comprised 3%. The number of

¹² Statistics Estonia divides trips in three according to their purpose. **Holiday** – travelling for recreation purposes: spending one's annual holiday or weekend, visiting friends or acquaintances or other trip for leisure. A holiday or bonus trip paid by the employer. **Business trip** – a trip organised or paid for by the employer, which is related to the performance of work duties, incl. participation in conferences, congresses, meetings, seminars, training, etc. They divide in business trips and conference trips. **Other trip** – trips not counted as holidays or business trips (e.g. transit tourism, medical tourism, etc.).

Estonians who stayed in accommodation establishments increased by a tenth, but the number of tourists changed in different directions in terms of the purposes of travelling. Compared to 2012, holiday trips increased by 17%, conference trips by 7% and trips for other purposes by 29%. The number of business trips decreased by two percentage points.

The share of holiday travellers by month was the highest in July (72% of all trips by domestic tourist in July) and the share of business trips was the biggest in January (45% of all trips). The share of conference travellers was the highest in March (7% of all trips).



Source: Statistics Estonia

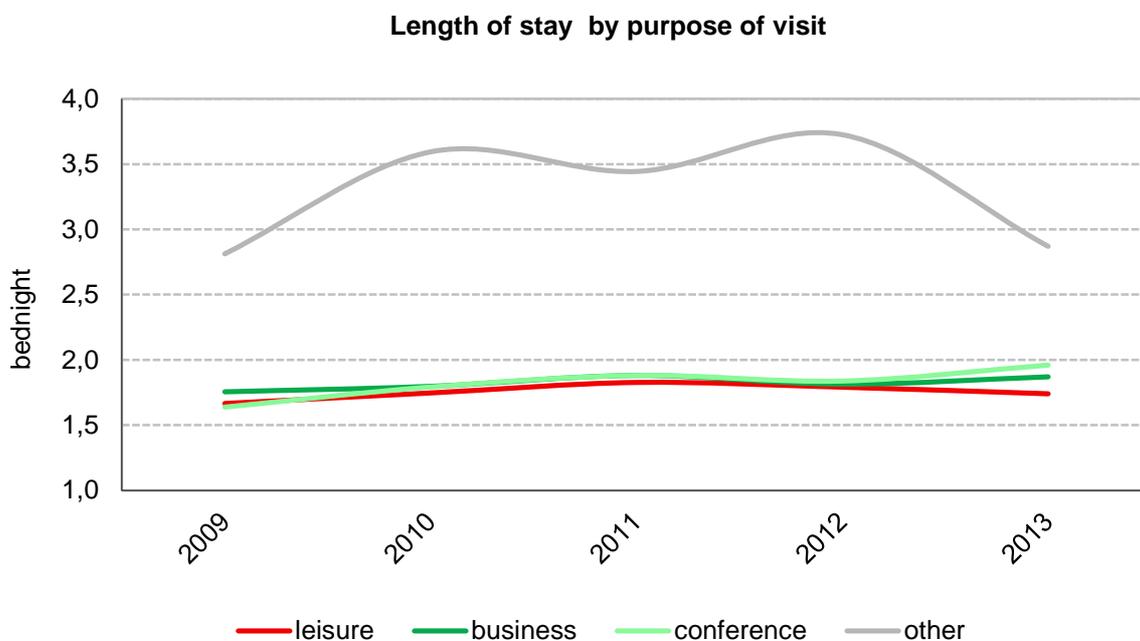
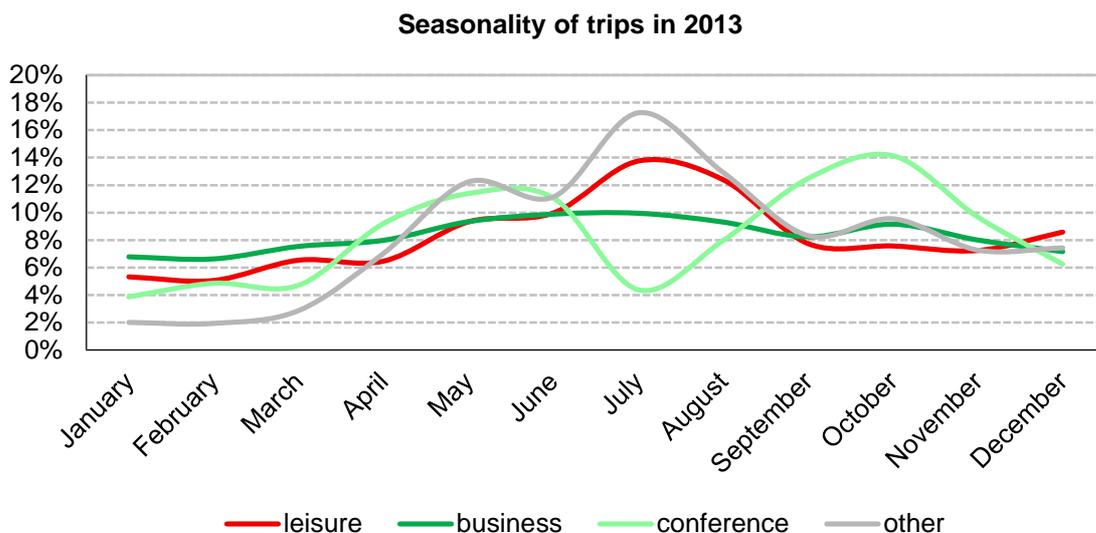
The nights spent by tourists in accommodation establishments (2,802,100 nights) divided as follows: 71% (1,996,000) tourists were here on holiday, 22% (609,700) on business, 4% (99,100) attended conferences and 3% (97,400) travelled for another reason (studies, health). The number of nights spent on holiday trips decreased by one percentage point and the number of nights spent on business trips increased by one percentage point. The number on nights spent on conference trips increased by a fifth and overnight stays for other purposes by a half.

Trips in 2013 were shorter (-1%), but the duration of trips changed in different directions by purposes. Holiday trips (1.74) and trips for other purposes (2.87 nights) were shorter than in the previous year. Business trips and conference trips lasted for 1.87 and 1.96 nights, respectively, and were longer than in the previous year.

The duration of trips has remained similar also across a longer period of time: the duration of conference trips, business trips and holiday trips is more or less the same. Only trips for other

purposes are considerably longer than other trips to the city.

The seasonality of trips to Tallinn is rather high, because most tourists travel here for holiday purposes. In the case of business trips seasonality is relatively small compared to trips for other purposes. Conference trips peaked in October when one-seventh of all trips of the year took place. The number of conference tourists in May, June and autumn (September, October, November) was also higher than the average for the year. The highest number of visits for other purposes occurred in July (17%), most of them probably to visit friends and relatives.



Source: Statistics Estonia

Travellers at Tallinn Lennart Meri Airport

1.96 million passengers (-11%) in total travelled via Tallinn Airport in 2013. The decrease in the number of passengers was the result of the decrease in the number of destinations and flights as well as the change in the operating strategy of the main airline, Estonian Air. The number of Estonian Air's clients decreased by more than a third (-38%) when compared to the previous year. The number of passengers decreased less than forecast at the start of the year¹³.

Passengers of international flights comprised the majority of passengers (99%). The number of passengers on internal flights decreased by almost a fourth (-23%) when compared to the year before. 87% of passengers used regular flights.

Analysing the changes in the number of passengers by months, we see that the biggest decrease in the number of passengers occurred in the first half of the year. The decrease in the second half of the year remained below ten percentage points.

The survey of passengers travelling via Tallinn Airport indicated that passengers on regular flights divided as follows in 2013: 48% business travellers, 30% holiday travellers, 15% visited friends and relatives and 7% travelled for other purposes. The number of business travellers among all passengers increased the most in comparison to the year before (the share of business trips increased by three percentage points).

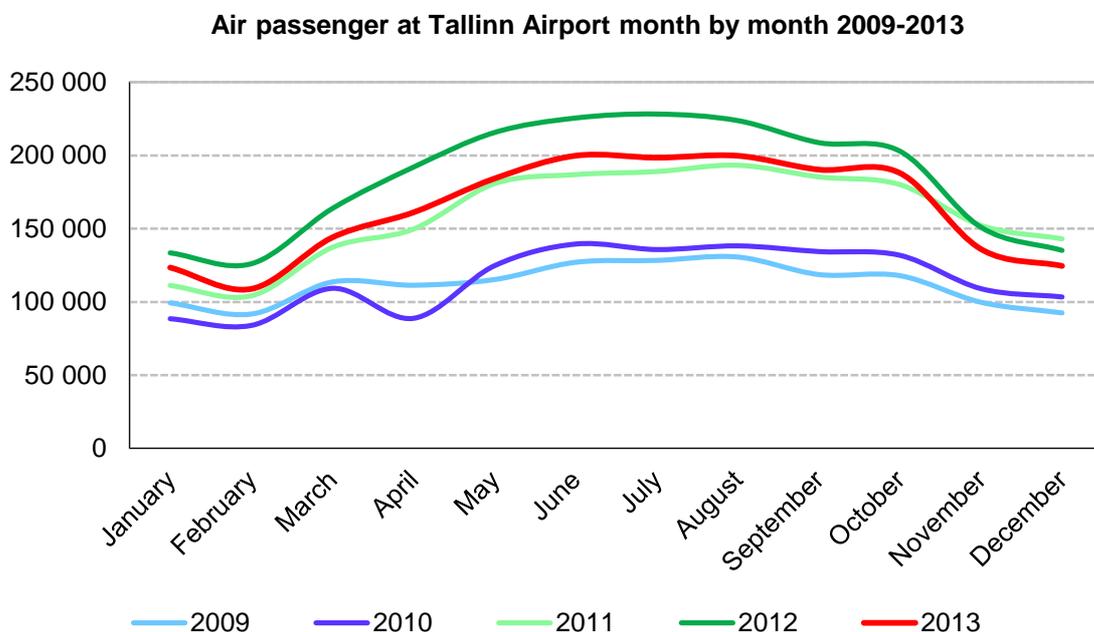
Approximately two-thirds (61%) of air passengers were from Estonia, 5% from Sweden, 5% from Russia, 4% from the UK and 4% from Germany. The share of other countries totals 21%.

The number of Estonian passengers increased considerably and the number of Russian air passengers decreased in comparison to the previous year. The number of passengers on Finnair, Lufthansa, airBaltic, Norwegian, LOT and FlyBe flights increased over the year. In addition to Estonian Air, budget airlines easyJet and Ryanair also ended the year with weaker results. The destinations of regular flights changed compared to 2012. 20 routes were operated from Tallinn during the entire year (24 routes in summer). Turkish started flying to Istanbul. 21 routes were operated from during the entire year in 2012 (36 routes were operated seasonally). Although the number of flights in 2013 was smaller than before, the decrease in the number of passengers was smaller only by a tenth. The average occupancy of aircraft on regular lines was 70%. Downsizing the route network mostly affected seasonal or regional routes.

The flights from Tallinn Airport in the biggest demand were on the Frankfurt (12% share in the total number of regular flight passengers), Helsinki (12%) and Riga (11%) routes. Similar to the previous year, Estonian Air served the largest number of passenger (28%), but the market share of the national airline decreased by 12 percentage points. Ryanair remained in the second place (15% of

¹³ <http://www.aripaev.ee/article/2014/1/8/prognoositust-10-enam-lendajaid>.

passengers), followed by Lufthansa, airBaltic and Finnair with 10% each. Compared to the year before, the market share of Lufthansa increased by one percentage point, the share of Finnair decreased by one percentage point and the share of airBaltic decreased by two percentage points.



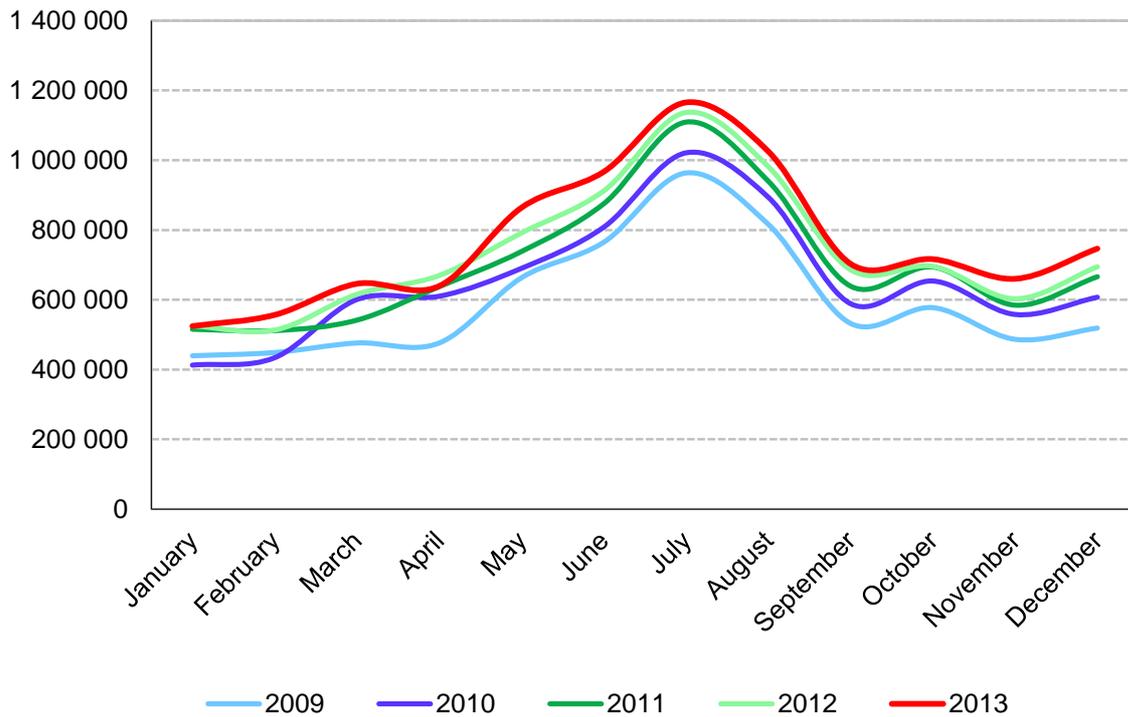
Source: Tallinn Airport

Passengers at the Tallinn Old City Harbour

The number of passengers travelling through the Old City Harbour increased by 4.5% in 2013. The total number of passengers served was 9.2 million. The number of passengers on the Tallinn-Helsinki route increased by four percent to 7.57 million and comprised 82 percent of all passengers. 935 thousand passengers (10%) travelled on the Tallinn-Stockholm route from January to the end of December and 184 people (two percent) travelled on the St Petersburg route. Cruise passengers comprised six percent of the passengers travelling through the Old City Harbour and their number totalled 519,300.

60 percent of all passengers or 5.54 million people travelled by Tallink ferries, but the vessel with the biggest number of passengers was Viking Line's Viking XPRS with 1,828,742 passengers over the year. Tallink's Superstar and Star, which travel on the Finland route, were the next most popular vessels with 1,698,514 and 1,671,161 passengers, respectively. Tallink's Baltic Queen transported the biggest number of passengers on the Tallinn-Stockholm route (509,881 people). Tallink served 5.54 million people or 60 percent of all passengers in 2013. They're followed by Viking Line with 20 percent, Eckerö Line with 12 percent and St. Peter Line with two percent.

Passengers in Tallinn Old City Harbour



Source: Port of Tallinn

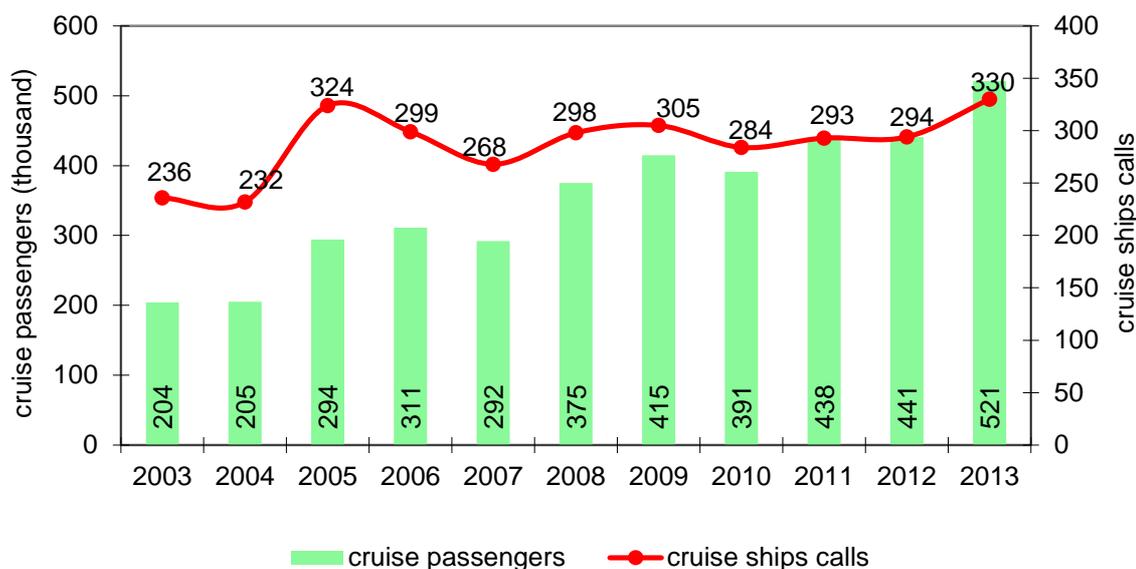
Tallinn is the third most popular stopping place for cruise ships travelling in the Baltic Sea region. In 2013, cruise ships visited Copenhagen 347 times, St Petersburg 335 times and Tallinn 330 times¹⁴.

519,300 cruise tourists visited Tallinn during the year. The biggest share of these tourists were from Germany, comprising 24 percent of all of the cruise passengers who travelled here. They were followed by US citizens with 19 and British citizens with 17 percent. Citizens of 155 countries visited Tallinn as cruise passengers. The number of cruise tourists increased by 18% in comparison to the year before. Three cruise ship crew changes occurred in cooperation with the airport for the third year on the run¹⁵. The biggest number of cruise visits occurred in June and July when 90 ships with 116,557 people aboard and 88 ships with 144,877 people aboard stopped here. Cruise ships stopped in Tallinn for eight hours on average. Up to 9000 cruise passengers went on a tour of Tallinn on the busiest days in July. The estimated amount of money left by cruise tourists in Tallinn is ca. 30 million euros.

¹⁴ [http://www.cruisebaltic.com/media\(5012,1033\)/Cruise_Baltic_Statistics_2000-2014.pdf](http://www.cruisebaltic.com/media(5012,1033)/Cruise_Baltic_Statistics_2000-2014.pdf).

¹⁵ I.e. come passengers and crew of the cruise ship changed.

Cruise ships calls and passengers in Tallinn



Source: Port of Tallinn

Visits to Tourist Information Centre and Tallinn's tourism information channels

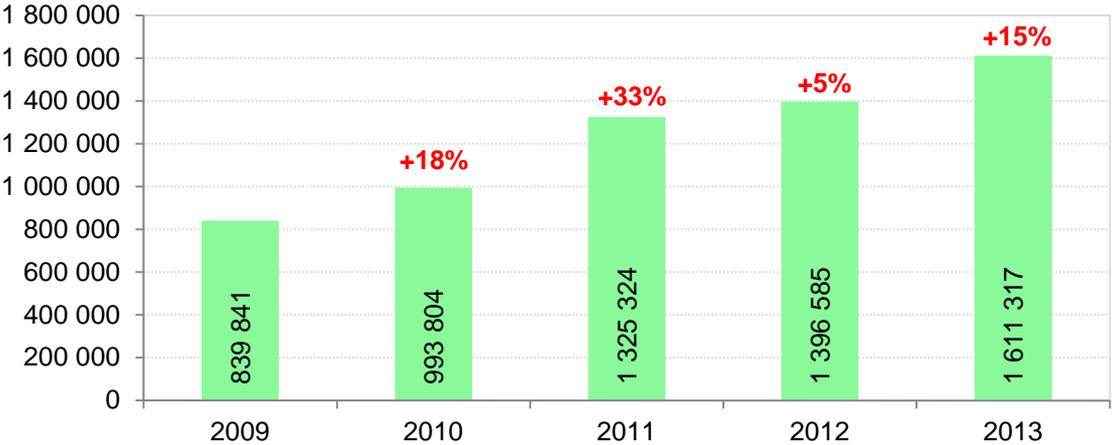
The Tourist information centres of Tallinn served 159,100 visitors (+5%) in 2013. 94% of them were citizens of foreign countries. The number of visitors increased by 5% in comparison to 2012. The majority of the visitors served were from Russia (32,000), Germany (19,700) and Finland (14,100). The number of clients from Russia increased the most compared to 2012. The trend of previous years continued: the number of information requests made in the centres increased, the number of requests by letter, fax and e-mail decreased. The clients of the Tourist Information Centre expect more advice and recommendations than before. Visitors were the most interested in transport connections, city maps, tours and shopping information. There was also a lot of interest in sights, museums, events and the Tallinn Card.

Tourist information about Tallinn was also given in electronic channels such as the Tallinn Tourist Web, Tallinn Image bank, mobile apps of tourist information and VisitTallinn accounts in social media.

Tallinn Tourist Web (www.tourism.tallinn.ee) received 1.61 million visits during the year and it was read over 5.77 million times. The average number of times browsed during a visit was 3.6. The average length of a visit was over four minutes (4:09). The number of visits increased in comparison to the year before; the number of views did not change. Approximately one-fifth (19%) of visits were made from mobile devices and this is probably the reason why the average length of a visit decreased.

The people who visited the tourist web were the most interested in Tallinn’s sights, entertainment and practical travel planning information. Most of the browsers came from Finland (20%) and Russia (12%), followed by the UK (6%), Germany (5%) and Sweden (4%). The Tourist Web is also an important source of information for Estonians whose visits in 2013 comprised more than a quarter (27%) of all visits to the tourist web.

Tourism Web (www.tourism.tallinn.ee) visits



Source: Tallinn City Tourist Office & Convention Bureau

The Tallinn Image bank (tallinn.fotonet.ee) with hundreds of photos of Tallinn as a tourist destination is available to tourism professionals and press travellers. The Image Bank was visited more than 10,000 times last year. The online mobile application of tourist information at www.tallinn.mobi was visited ca. 67,000 times in 2013. Tallinn as a tourist destination uses social media to increase awareness of the city and to distribute tourist information. Tallinn as a tourist destination is represented in social media channels under the name VisitTallinn. The Facebook page www.facebook.com/VisitTallinn was viewed more than 2.3 million times. The tourism videos of Tallinn on YouTube were viewed 71,400 times. The photo galleries with views of Tallinn in Flickr were viewed ca. 73,000 times.

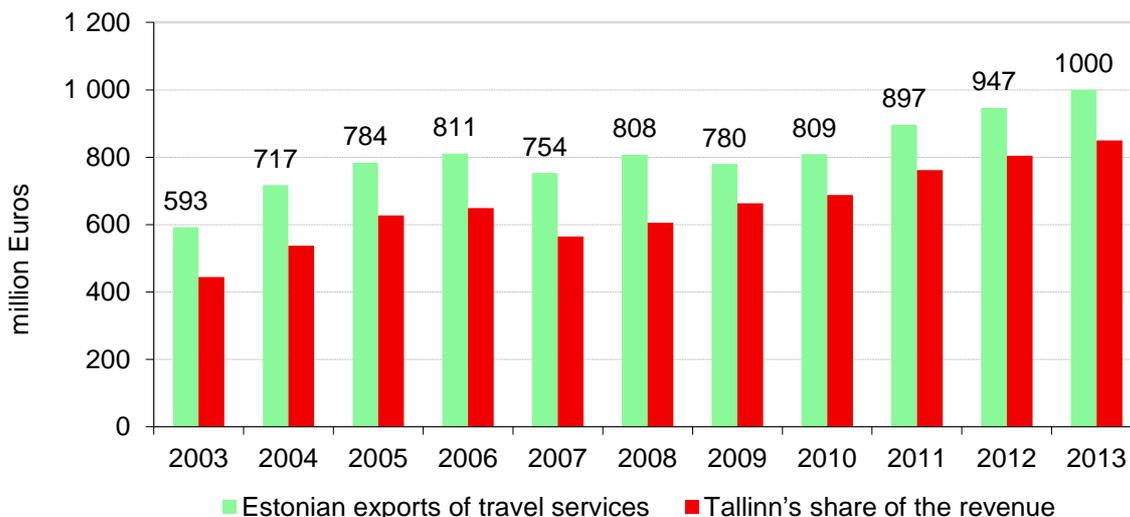
Tallinn's revenue from tourism

The Bank of Estonia estimates that Estonia’s export of travel services increased by 6% in 2013. Foreign visitors consumed goods and services in Estonia for more than a billion euros¹⁶. Considering the regional division of foreign visitors and the structure of the costs associated with the trips of foreign visitors, the estimated share of Tallinn in Estonia’s export of travel services is 80%-85%. **Export of travel services** by Tallinn (money spent by foreign visitors in Tallinn) increased by five-six percentage points and totalled ca. **850 million euros**.

¹⁶ <http://www.eestipank.ee/en/press/estonians-travelled-more-widely-2013-14022014>



Foreign tourists average spending in Estonia (export of travel services) and estimated Tallinn's share of it 2003-2013



Source: Bank of Estonia

Summary

In 2013 there were a total of 3 million visits to Tallinn by foreigners. The number of foreign visitors increased by a tenth over the year. The increase in the number of tourists was primarily guaranteed by the continuing interest of the people of neighbouring states in city breaks in Tallinn and the cultural and sports events held during the year. The Robbie Williams concert in August had the biggest impact on tourism figures of the year.

1.56 million tourists stayed in the accommodation establishments of the capital, which was three percent more than in 2012. 89 percent of all visitors who used accommodation in Tallinn were foreign tourists and the majority of them (62%) were from Finland and Russia. 2.80 million nights in total were spent in the accommodation establishments of Tallinn.

Tallinn remains a valued holiday destination. 73 percent of the city's guests came here on holiday, 21 percent were business travellers, 4 percent attended conferences and 2 percent visited the city for another reason. According to travel purposes, the number of holiday trips by Estonians increased the most (+17%) and the number of foreign visitors increased the most among conference and training attendees (+30%).

Visits to Tallinn are relatively seasonal in comparison to other European cities and they are also short. The duration of trips shortened in 2013 to 1.79 nights in average. Seasonality did not change much

and the number of visitors was the highest in July. As a positive trend, the increase in the number of visitors to the capital continued to increase in the first and fourth quarters.

There were no big changes on accommodation market. 324 accommodation establishments (incl. 55 hotels) were operating in Tallinn. They had 7,334 and 14,914 beds in total. The number of available rooms and beds in the accommodation establishments of Tallinn decreased during the year, but the income of the establishments increased. Accommodation establishments earned 108 million euros from sales of accommodation services. Foreign visitors consumed goods and services in Tallinn for ca. 850 million euros.

International transport connections with Tallinn changed. 1.96 million passengers travelled through the Tallinn Airport, which was 11 percent less than the year before. The decrease in the number of passengers was the result of the decrease in the number of destinations and flight frequency as well as the change in the operating strategy of the main airline, Estonian Air. The Old City Harbour of Tallinn served 9.2 million passengers, an increase of 4.5 percent compared to the year before. The number of cruise passengers and people travelling on the Finland route increased. Cruise ships made 330 visits to the Old City Port during the year and 519,500 cruise passengers went on a tour of the city. Cruise passengers divided as follows by origin: 24% from Germany, 19% from the US, 17% from the UK, 6% from Spain and 34% from the remaining 149 countries.

Interest in tourist information about Tallinn increased. The Tallinn Tourist Information Centre served 159,100 visitors (+5%) and tourist information was also given in the Tallinn Tourist Web, the Tallinn Image Bank, mobile apps and on the VisitTallinn accounts in social media. The Estonian Tourism Portal was visited 1.61 million times (+15%) during the year.

Table. Tourists accommodated in Tallinn, number of nights spent and length of stay*

Country of origin	Accommodated	Change 2012/2013		Bednights	Change 2012/2013		Length of stay
Albania	107	-178	-62	251	-289	-54	2,35
Austria	4 704	-1 939	-29	12 193	-2 087	-15	2,59
Belgium	6 029	-742	-11	13 044	-1 954	-13	2,16
Bulgaria	1 231	-123	-9	2 967	-620	-17	2,41
Spain	20 363	-2 154	-10	49 517	1 187	2	2,43
Holland	11 589	-2 064	-15	25 560	-4 455	-15	2,21
Croatia	640	-401	-39	2 206	307	16	3,45
Ireland	2 687	-1 775	-40	6 568	-4 529	-41	2,44
Island	1 037	307	42	2 734	947	53	2,64
Italy	22 385	-4 212	-16	53 465	-7 489	-12	2,39
Greece	1 841	-572	-24	5 264	-303	-5	2,86
Cyprus	305	-295	-49	739	-696	-49	2,42
Lithuania	34 587	3 450	11	64 829	13 994	28	1,87
Luxembourg	761	-430	-36	1 474	-910	-38	1,94
Latvia	44 970	-1 232	-3	70 138	169	0	1,56
Malta	342	43	14	827	187	29	2,42
Norway	31 727	-10 563	-25	74 898	-18 243	-20	2,36
Poland	18 690	-1 272	-6	40 992	4 763	13	2,19
Portugal	2 516	-37	-1	5 776	-431	-7	2,30
France	17 786	-1 148	-6	43 541	-2 156	-5	2,45
Sweden	51 973	-4 791	-8	87 043	-8 074	-8	1,67
Romania	2 168	292	16	5 989	1 692	39	2,76
Germany	70 781	-7 919	-10	153 581	-11 691	-7	2,17
Switzerland	6 955	-1 215	-15	13 665	-1 956	-13	1,96
Slovakia	1 361	-769	-36	4 191	-1 261	-23	3,08
Slovenia	1 037	-181	-15	2 595	-237	-8	2,50
Finland	648 862	59 096	10	974 636	27 830	3	1,50
United Kingdom	37 581	-10 699	-22	87 493	-25 484	-23	2,33

Country of origin	Accommodated	Change 2012/2013		Bednights	Change 2012/2013		Length of stay
		No	%		No	%	
Denmark	9 433	-2 089	-18	18 357	-3 327	-15	1,95
Czech Republic	4 081	-482	-11	9 129	-669	-7	2,24
Turkey	5 373	602	13	12 793	2 378	23	2,38
Ukraine	9 429	1 515	19	21 543	4 205	24	2,28
Hungary	2 966	235	9	8 060	1 566	24	2,72
Russia	204 232	20 825	11	417 454	47 651	13	2,04
Other European countries total	30 573	3 295	12	59 110	9534	19	1,93
African countries total	1 411	-424	-23	3 617	-51	-1	2,56
Incl. Republic of South Africa	377	-47	-11	871	16	2	2,31
Asian countries total	32 953	5 952	22	56 635	10047	22	1,72
Incl. China	6 782	1 559	30	13 695	4473	49	2,02
Incl. Japan	9 858	1 826	23	17 658	3419	24	1,79
Incl. South Korea	6 386	2 346	58	8 052	2629	48	1,26
United States of America	23 615	-2 692	-10	54 529	-3831	-7	2,31
Canada	2 990	-437	-13	6 922	-1033	-13	2,32
South and Central America	5 256	17	0	10 579	672	7	2,01
Incl. Brazil	2 789	-248	-8	5 799	195	3	2,08
Australia, Oceania	6 059	426	8	13 623	1122	9	2,25
Incl. Australia	5 247	450	9	11 762	1009	9	2,24
Other countries	5 665	-5 886	-51	9 619	-12507	-57	1,70
Total foreign tourists	1 389 051	29 334	2	2 508 146	13968	1	1,81
Total Estonian residents	172 626	16 140	10	293 965	30446	12	1,70
Grand total	1 561 677	45474	3	2 802 111	44414	2	1,79

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