



Overview of the Tourism Trends of Tallinn in 2014

Tallinn City Enterprise Board

Tourism Department

Introduction

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

The overview aims to provide information about the main factors influencing the tourism sector as well as statistics related to tourism. This publication is primarily intended for the partners of Tallinn and tourism professionals, and it will give a basic overview of the main developments in Tallinn's tourism.

The overview will present a short summary of tourism trends against the backdrop of the global and European context, as well as a more detailed look at the tourism statistics of Tallinn.

What you will find in the overview:

- The number of foreign visitors
- The number and countries of origin of tourists who stayed in Tallinn's accommodation establishments
- Purposes of visiting the city
- Seasonal division of visits and trip lengths
- Accommodation market figures
- Estimated spending of foreign visitors in Tallinn
- Tourism Information Centre visiting and Tourism Web viewing statistics
- The number of travellers served in Tallinna Vanasadam (Tallinn's Old City Harbour) and Airport.

All data come from the Statistics Board, Eesti Pank (Central Bank of Estonia), the Tallinn Foreign Visitors Survey 2014 conducted by TNS Emor, the tourism-related information platform TourMis and publications of the World Tourism Organization (UNWTO), European Cities Marketing (ECM) Benchmarking Report, Tallinn Airport and the Port of Tallinn.

A Short Overview of Tourism in Tallinn

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

A total of 3,087,070 tourists stayed at the accommodation establishments of Estonia in 2014, 52% of whom (1,603,204 tourists) stayed in Tallinn (Statistics Board, 2015).

1,603,204 tourists stayed in the accommodation establishments of Tallinn in 2014 (a 3% increase on the previous year).

Compared to 2013, there was an increase in the numbers of international as well as domestic tourists.

Total accommodated 1,603,204 +3%↑

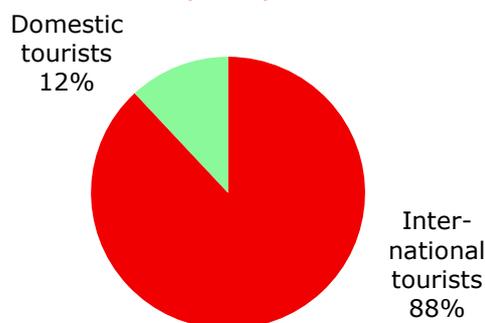
incl:

international tourists: 1,412,001 +2%↑

domestic tourists: 191,203 +11%↑

Of all tourists in 2014, international tourists accounted for 88% and domestic tourists for 12%

Tourists accommodated in Tallinn (2014)



Visitors from the neighbouring countries of Finland (47%) and Russia (13%) dominated among the international tourists. In numbers, the amount of tourists from Finland showed the largest increase (+15,183 tourists, i.e. +2%), while the number of tourists from Russia decreased most (-27,178 tourists, i.e. -13%).

Tourists accommodated by the main countries of origin:

Latvia	43,355	-4%↓
Norway	30,480	-4%↓
Sweden	49,897	-4%↓
Germany	79,649	+13%↑
Finland	664,045	+2%↑
UK	39,214	+4%↑
Russia	177,054	-13%↓
Other countries	328,307	+10%↑

Greatest increase:

Finland	+15,183	+2%↑
Germany	+8,868	+13%↑
Asian countries	+11,946	+36%↑
USA	+4,183	+18%↑

Greatest decrease:

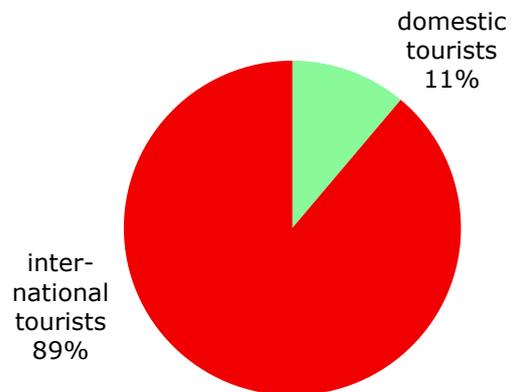
Russia	-27,178	-13%↓
Sweden	-2,076	-4%↓
Latvia	-1,615	-4%↓
Norway	-1,247	-4%↓

Tourists spent a total of 2,855,048 nights in the accommodation establishments of Tallinn (an increase of 2% on the previous year).

Total nights spent:	2,855,048	+2%↑
incl.		
nights spent by international tourists	2,537,840	+1%↑
nights spent by domestic tourists	317,208	+8%↑

Of all nights spent, those by international tourists accounted for 89% and those by domestic tourists accounted for 11%.

Overnight stays of tourists accommodated in Tallinn (2014)



Nights spent by tourists by the main countries of origin:

Finland	989,636	+2%↑
Russia	362,966	-13%↓
Germany	181,395	+18%↑
Latvia	69,579	-1%↓
UK	87,706	0%
Norway	71,090	-5%↓
Sweden	83,005	-5%↓
Other countries	692,463	+8%↑

Greatest increase:

Germany	+27,814 nights	+18%↑
Asian countries	+18,893 nights	+33%↑
Finland	+15,000 nights	+2%↑

Greatest decrease:

Russia	-54,488 nights	-13%↓
Poland	-4,537 nights	-11%↓
Sweden	-4,038 nights	-5%↓

The average length of stay in the period from January to December 2014 was 1.78 nights, which is shorter than in 2013 (-1%).

Most of the tourists came for leisure.

73% of the visits to the city were for the purposes of leisure, 21% were business trips, 4% were for participation in conferences or training sessions and 2% for other reasons.

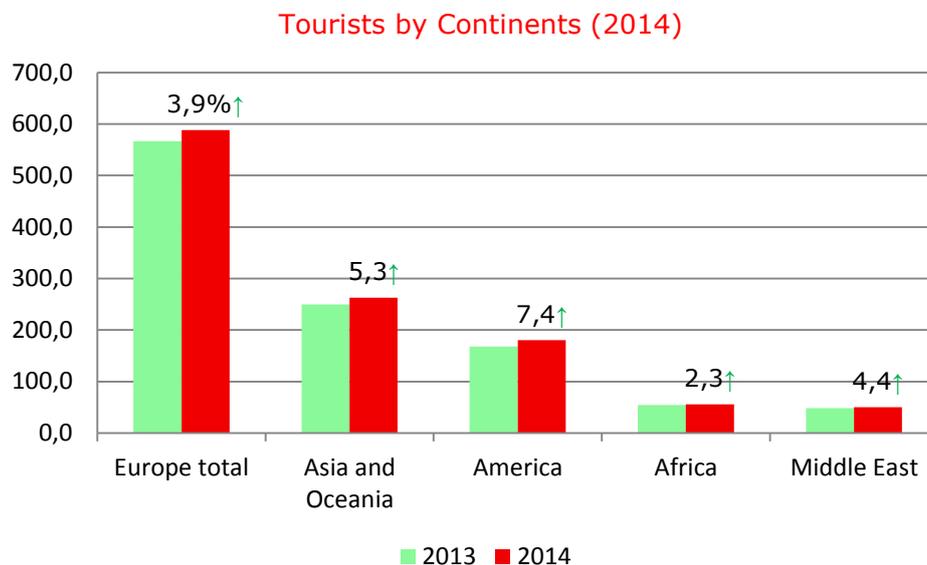
The average room occupancy of accommodation establishments in 2014 was **64%** (an increase of 3%) and the average price was 40 Euros (an increase of 4 %).

Tallinn Airport served a total of 2,017,371 passengers in 2014 (an increase of 3%) and Tallinn's Old City Harbour had a total of 9,541,210 passengers (an increase of 4%).

The Position of Estonia and Tallinn as Tourism Destinations in Europe and Globally

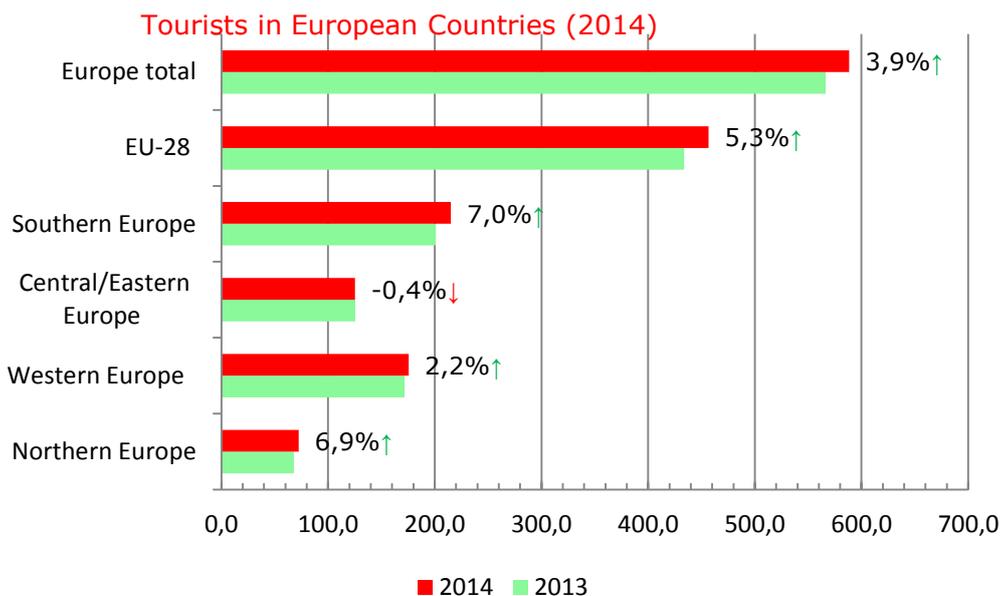
A total of more than 1.1 billion tourists travelled globally in 2014, which is a 5% increase compared to 2013.

Of all the destination regions in the world, Europe received more than one half, i.e. 588 million visitors (UNWTO, 2015).



Source: World Tourism Barometer (UNWTO, 2015)

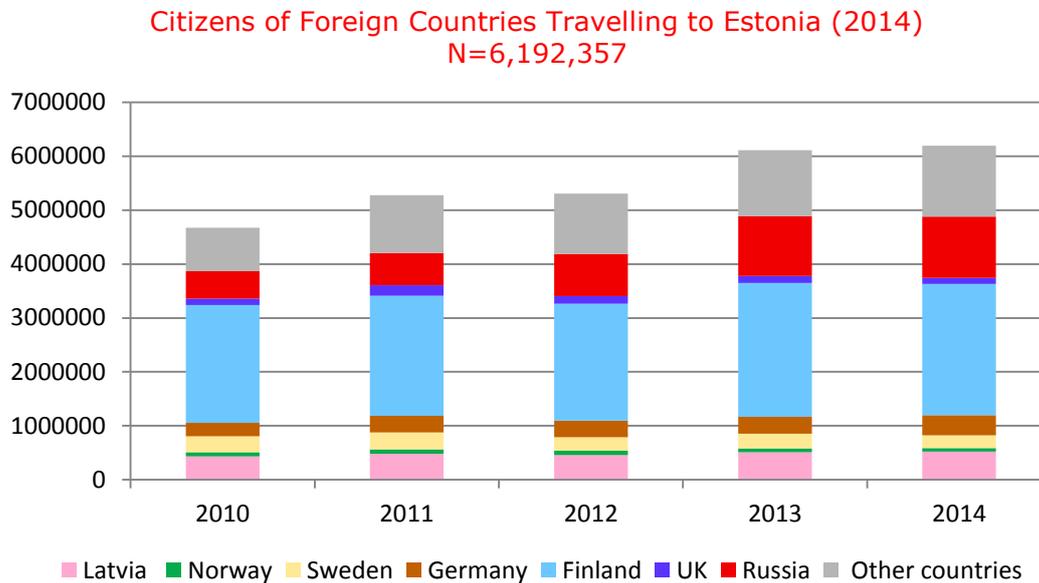
The number of tourists increased in the European region by 4% in 2014 compared to the previous year. The 28 countries of the European Union received 5% more tourists in 2014 than in 2013.



Source: World Tourism Barometer (UNWTO, 2015)

Visits to Estonia

According to Eesti Pank (2015), 6,192,357 foreign visitors visited Estonia in 2014¹, a 1% increase over 2013. The number of visitors from the EU remained on the same level as the year before, accounting for 71% of all visits.



Source: Eesti Pank (2015)

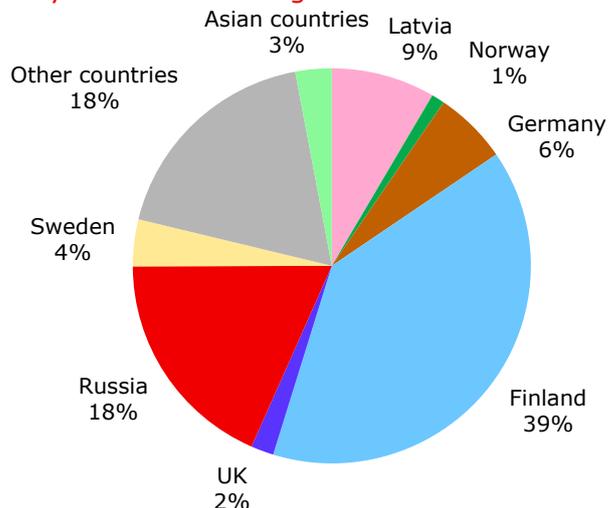
39% of the total number of visits were made by visitors from Finland. Of the EU countries, the numbers of visitors from Germany (17%) and Portugal (15%) showed the highest increase. The numbers of visitors from Sweden and Norway, however, decreased by 12% and 9%, respectively. Out of all visits, 18% came from Russia. Their number grew by 3% for the year, but decreased by 11% in the last quarter.

The considerable growth of numbers of visitors from Japan, Korea and China did not stop in 2014 (47%, 28% and 61%, respectively). However, the share of Asian tourists in the overall numbers is small (3%).

Travellers who stayed for several days made up almost a half of the total number of visitors to Estonia, and two thirds of them stayed at accommodation establishments in Estonia. The average stay for multiple-day travellers was 4.5 days, i.e. 8% longer than in 2013.

¹ The tourism statistics of Eesti Pank are based on mobile positioning data.

Trips by Citizens of Foreign Countries to Estonia (2014)



Source: Eesti Pank (2015)

According to the data of mobile positioning, almost 70% of all foreign visitors to Estonia visited Tallinn.

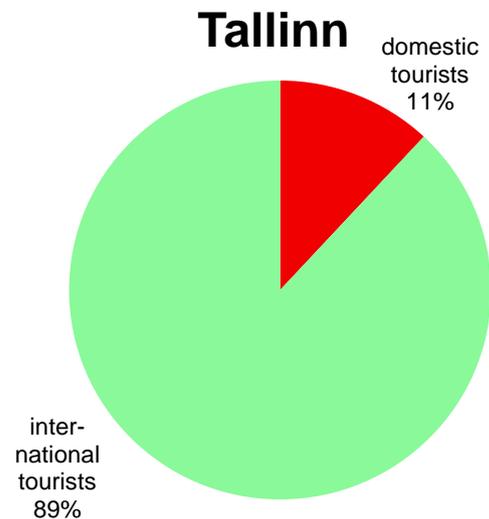
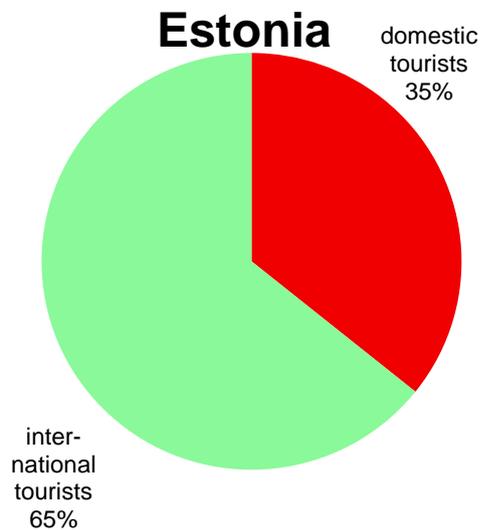
Data from the Statistics Board (2015) show that a total of 3 million tourists stayed in the accommodation establishments of Estonia in 2014 (3.56% more than in the previous year), with international tourists accounting for 1.9 million (2.23% more than in the previous year).

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

A total of 1.6 million tourists stayed in the accommodation establishments of Tallinn (3% more than the year before), accounting for 52% of all accommodated tourists to Estonia, with 1,412,001 of them being international tourists (2% more than the year before) and 191,203 domestic tourists (11% more than the year before).

A total of 5.8 million nights were spent in the accommodation establishments of Estonia by tourists. 2.8 million nights were spent by tourists in the accommodation establishments of Tallinn (+2%), making 49% of all nights spent in Estonia by tourists. The overnight stays of international tourists increased (+1%) as well as those of domestic tourists (+8%).

In a comparison of all tourists accommodated all over Estonia, there were more international tourists in Tallinn.



Tallinn's position among the European Countries

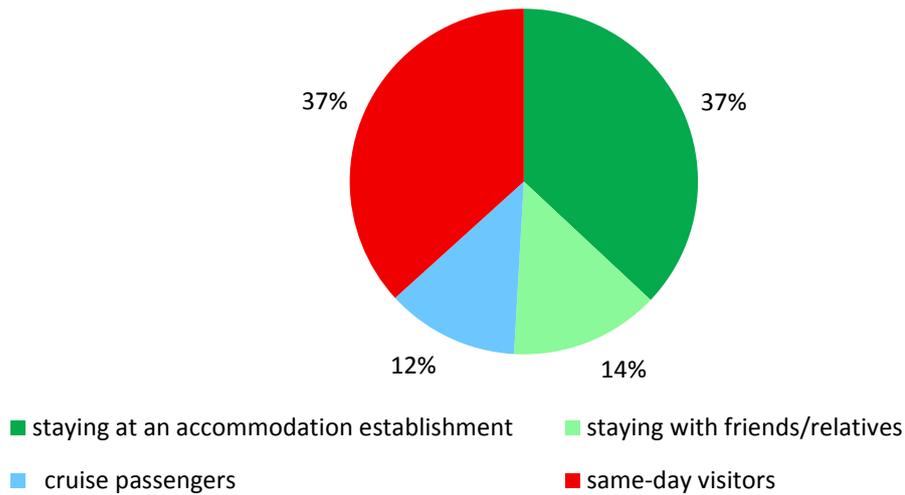
In the comparison with 119 European Cities Tallinn holds the 39th position in the European Cities' ranking of total bednights. Of the closest cities ahead of Tallinn are Stockholm which holds the 13th position with 11,8 million bednights, Copenhagen the 19th position with 7,5 million bednights and Helsinki 27th position with 4,4 million bednights. Tallinn positions itself ahead of Vilnius which holds the 54th position with 1,7 bednights. When considering the number of inhabitants of the city and the number of tourists (tourist density/bednights per citizen) Tallinn holds the 33th position among 119 European cities with 6.96 points (European Cities Marketing Benchmarking Raport, 2015).

In 2014, Tallinn received the highest number of foreign tourists in history.

According to the foreign visitors survey conducted by TNS Emor (2015), around 3.81 million foreign visitors visited Tallinn in 2014, half of whom (51%), i.e. 1.94 million stayed in the capital overnight.

37% of foreign visitors to Tallinn stayed at paid accommodation establishments and 14% at their friends or relatives. Of the 1.87 same-day visitors who came to Tallinn from other countries, 470,000 were passengers of cruise ships.

Distribution of Foreign Visitors to Tallinn in 2014



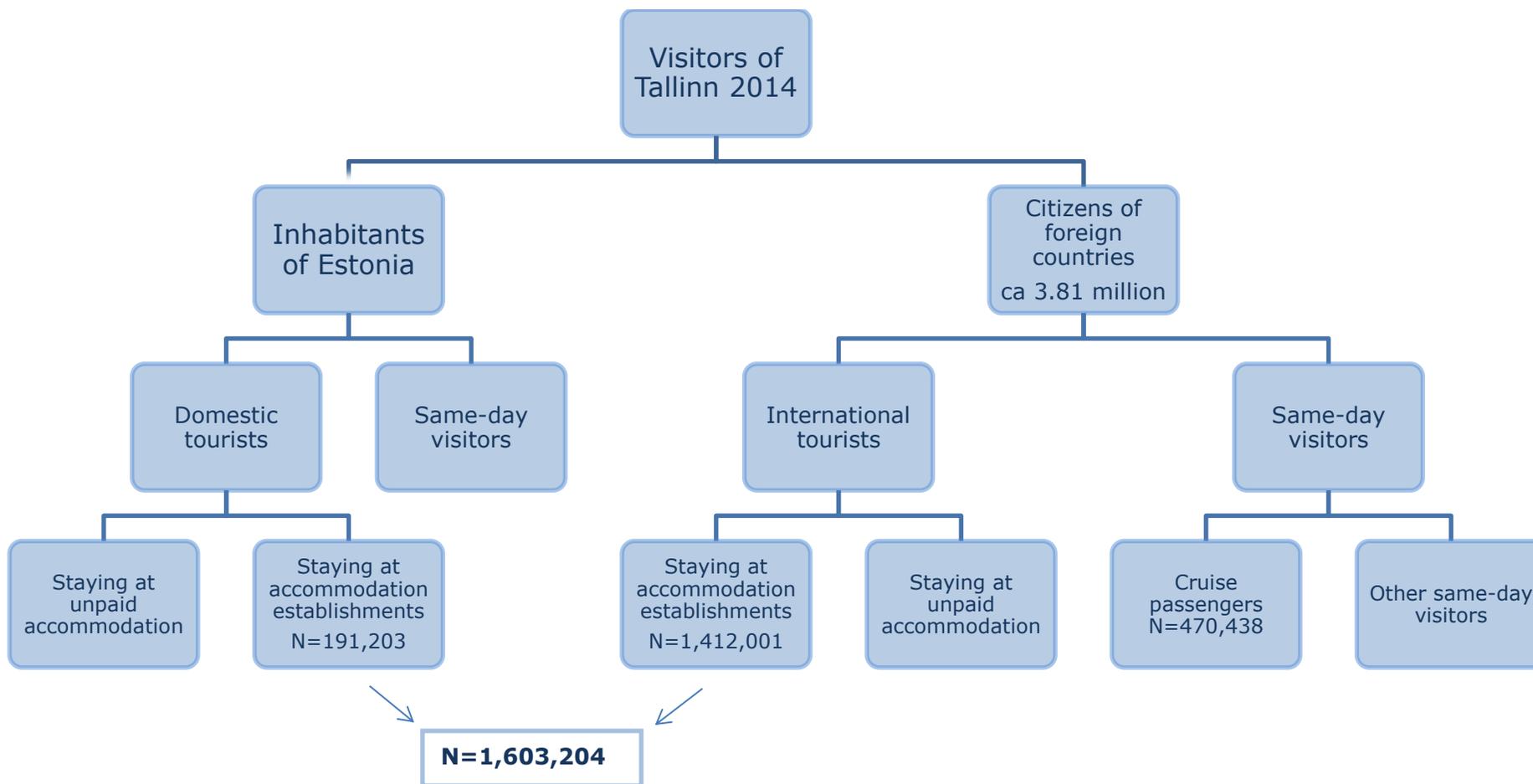
Source: TNS Emor, Survey of foreign visitors to Tallinn (2015)

Table 1. Distribution of foreign visitors to Tallinn in 2014

	Paid and unpaid accommodation	Same-day visitors	Cruise passengers	Foreign visitors total	Share of all foreign visitors
Finland	746,118	993,085	8,645	1,747,848	46%
Sweden	57,419	29,579	1,551	88,549	2%
Norway	36,416	5,586	1,493	43,495	1%
UK	49,954	9,303	64,342	123,599	3%
Germany	94,820	9,607	118,263	222,690	6%
Russia	246,593	111,307	11,014	368,914	10%
Latvia	69,703	29,167	23	98,893	3%
Other countries	640,580	214,667	265,107	1,120,354	29%
Total:	1,941,603	1,402,301	470,438	3,814,342	100%

Compared to figures from 2011, the share of foreign visitors to Tallinn who stay overnight has decreased (-6%), while the share of same-day visitors has increased.

Graph 1: Division of visitors to Tallinn in 2014



Source: The Tourism Department of the Tallinn City Enterprise Board

Tourists accommodated in Tallinn - number and countries of origin.

According to the Statistics Board, 1,603,204 tourists stayed in the accommodation establishments of Tallinn in 2014 (a 3% increase compared to previous year).

Domestic tourists accounted for 12% of all tourist visits and international tourists made up 88% of all tourists who visited Tallinn.

Total accommodated: 1,603,204 +3%↑ +41,527 persons

incl:

international tourists: 1,412,001 +2%↑ +22,950 persons

domestic tourists: 191,203 +11%↑ +18,577 persons



The main target markets continue to be the countries of Europe.

Table 2: Tourists accommodated in Tallinn by continents

Region of origin	Number	Change 2013/2014		Share of all international tourists
		%	Number	
Europe	1,506,181	+2%↑	+22,492	93.1%
America	37,951	+19%↑	+6,090	2.7%
Asia	44,899	+36%↑	+11,946	3.2%
Africa	1,677	+19%↑	+266	0.1%
Oceania	7,692	+27%↑	+1,633	0.5%
Unspecified	4,804	-16%↓	-900	0.3%
Foreign countries total	1,412,001	+2%↑	+22,950	100%

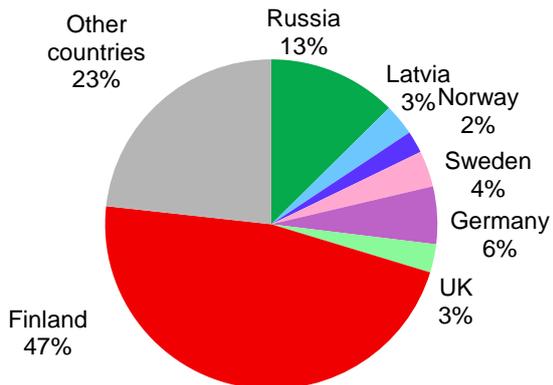
Source: TourMis (2015)

The numbers of visitors from Finland and Russia were the largest (Statistics Board 2015).

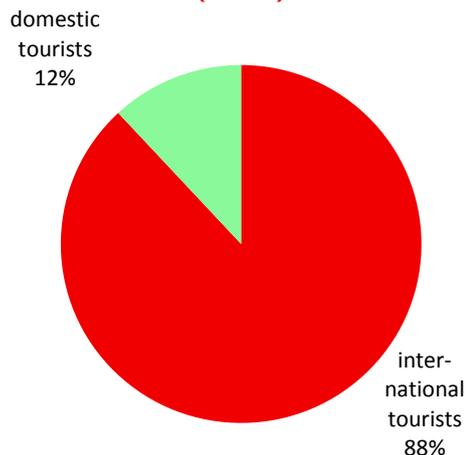
Table 3: Main foreign markets of Tallinn in 2014

Country	International tourists accommodated in 2014			Share of all international tourists
	Number	Change 2013/2014		
		%	Number	
Finland	664,045	+2%↑	+15,183	47 %
Russia	177,054	-13%↓	-27,178	13%
Latvia	43,355	-4%↓	-1,615	3%
Sweden	49,897	-4%↓	-2,076	4%
Norway	30,480	-4%↓	-1,247	2%
UK	39,214	+4%↑	+1,633	3%
Germany	79,649	+13%↑	+8,868	6%
Other countries	328,307	+10%↑	+29,382	23%
Foreign countries total	1,412,001	+2%↑	+22,950	100%

Share of International Tourists by Country (2014)

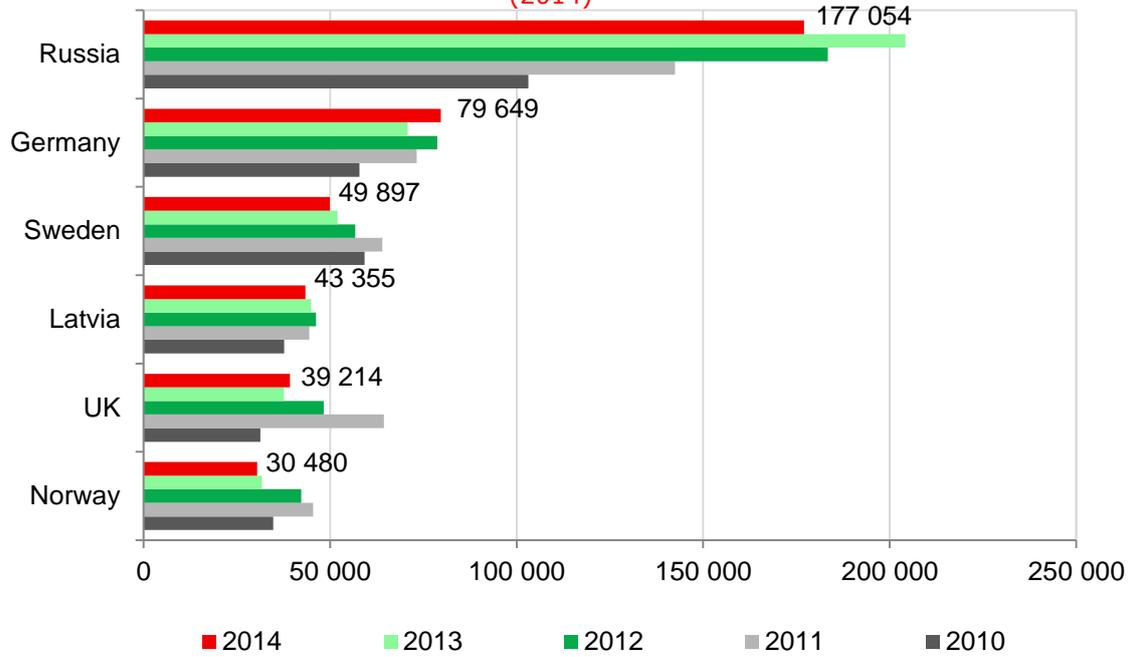


Distribution of Tourists (2014)



Source: Statistics Board (2015)

International Tourists from the Main Target Markets in Tallinn, by Countries
(2014)

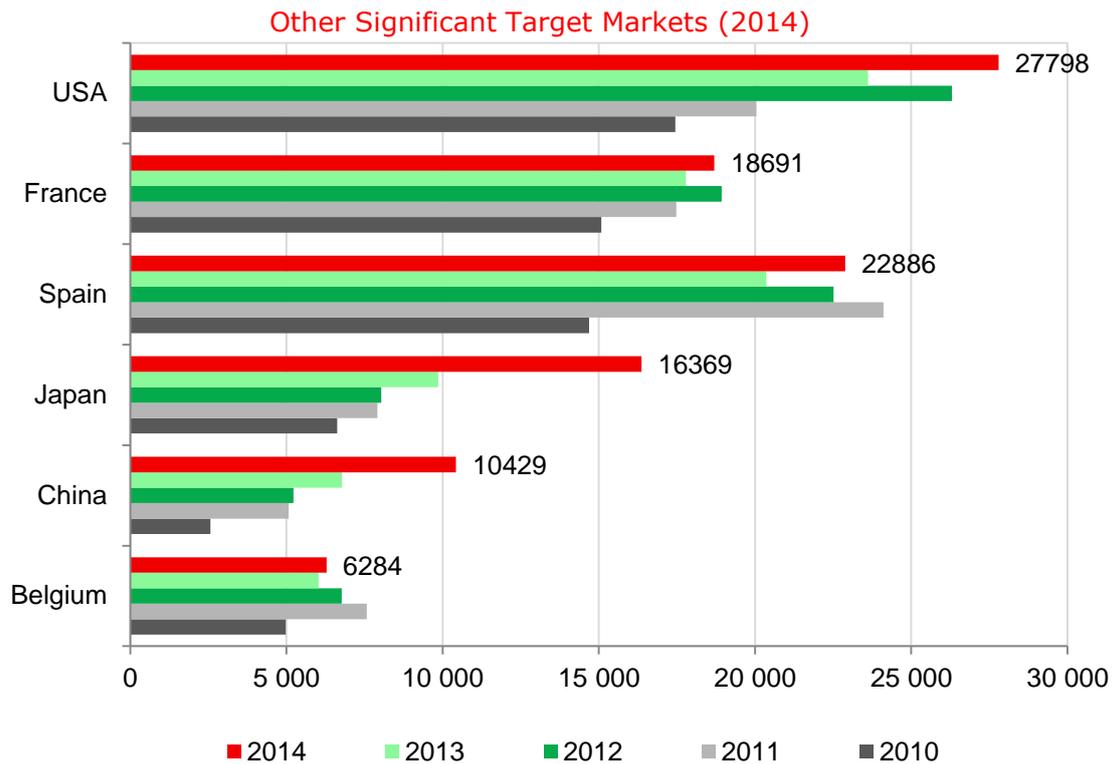


The number of tourists from more distant countries grew

Table 4. Changes in other foreign markets (2014)

Country	International tourists accommodated (2014)			Share of all international tourists
	Number	Change 2013/2014		
		%	Number	
Asian countries	44,899	+36%↑	+11,946	3.18%
USA	27,798	+18%↑	+4,183	1.97%
Spain	22,886	+12%↑	+2,523	1.62%
France	18,691	+5%↑	+905	1.32%
Australia, Oceania	7,692	27%↑	+1,633	0.54%

Tourists from other destination countries:



Overnight stays of tourists accommodated in Tallinn

The number of overnight stays of tourists accommodated in Tallinn increased by 2% in 2014.

Overnight stays by international tourists increased by 1% and those by domestic tourists by 8%.

Overnight stays total:	2,855,048	+ 2%↑	52,937 nights
incl:			
overnight stays by international tourists	2,537,840	+1%↑	29,694 nights
overnight stays by domestic tourists	317,208	+8%↑	23,243 nights

Of the main target markets, overnight stays by both Finnish (+2%) and German (+18%) tourists grew, while stays by tourists from Russia, (-13%), Latvia (-1%), Norway (-5%) and Sweden (-5%) decreased.

There was growth on other markets, especially in the numbers of overnight stays by tourists from Asia (+33%) and USA (+19%).

Nights Spent in Tallinn by Tourists 2010-2014

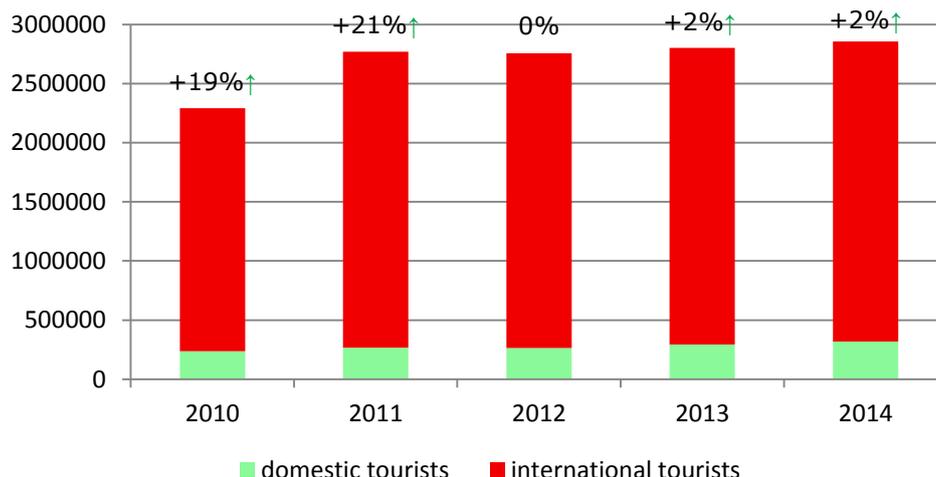


Table 5. Overnight stays from the main foreign markets of Tallinn, 2014

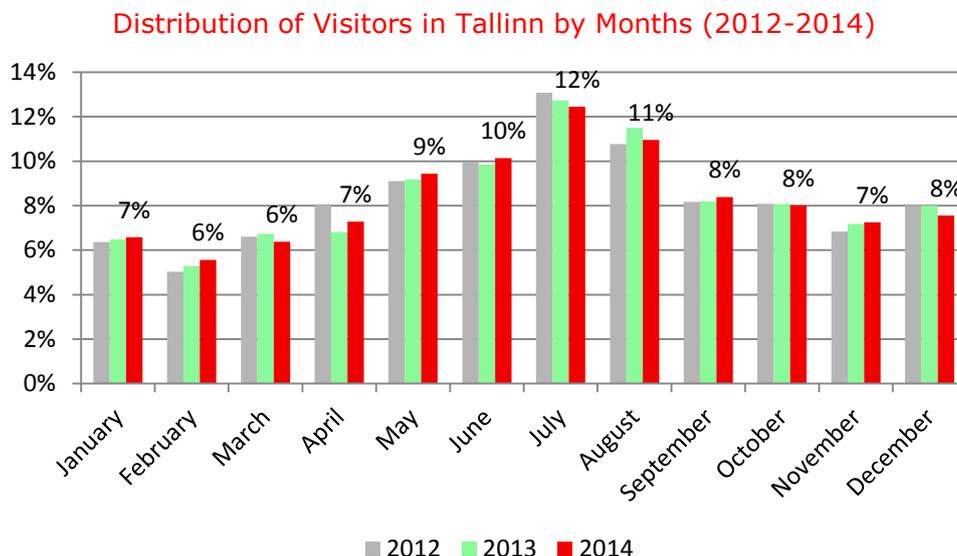
Country of origin	Overnight stays by accommodated international tourists, 2014			Share of all overnight stays by international tourists
	Number	Change 2013/2014		
		%	Number	
Finland	989,636	+2%↑	+15,000	39%
Russia	362,966	-13%↓	-54,488	14%
Germany	181,395	+18%↑	+27,814	7%
Latvia	69,579	-1%↓	-559	3%
UK	87,706	0%	+213	3%
Norway	71,090	-5%↓	-3,808	3%
Sweden	83,005	-5%↓	-4,038	3%
Other countries	692,463	+8%↑	+49,560	27%
Foreign countries total	2,537,840	+1%↑	+29,694	100%

Table 6. Changes in other foreign markets in 2014

Country of origin	Overnight stays by accommodated international tourists (March 2015)			Share of all overnight stays by international tourists
	Number	Change 2014/2015		
		%	Number	
Asian countries	75,528	+33%↑	+18,893	2.98%
USA	64,720	+19%↑	+10,191	2.55%
Spain	55,242	12%	+10,191	2.18%
France	43,767	1%	+226	1.72%
Canada	10,199	47%↑	+3,277	0.40%
Australia, Oceania	17,406	28%↑	+3,783	0.69%
Countries of Southern and Central America	13,033	23%↑	+2,454	0.51%

Distribution of Accommodated Tourists by Month.

Trips by residents of foreign countries to Tallinn are divided unevenly across the year. The Gini coefficient of visitors of Tallinn in 2014 was 0.143² (in 2013, it was 0.149).



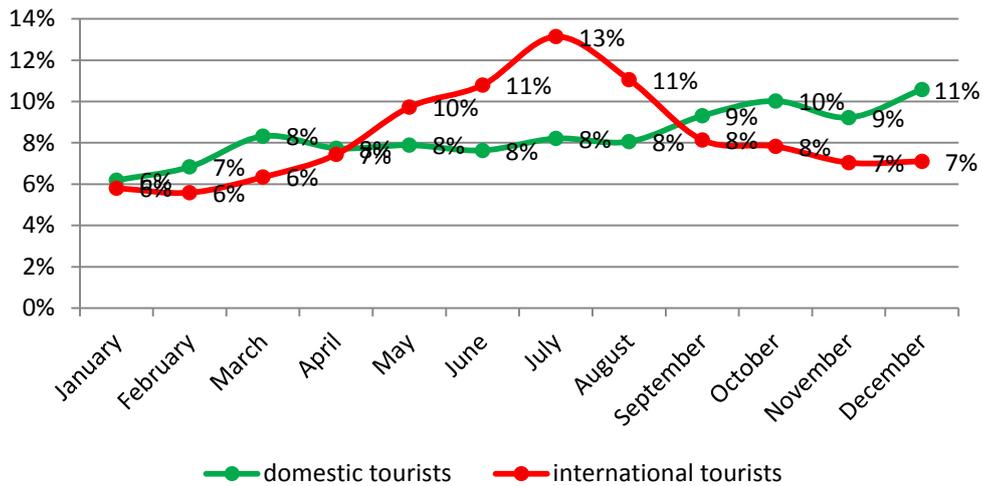
More than a third (35%) of the total number of visitors for the year were served during the three summer months in accommodation establishments. Half (50%) of the visits to Tallinn were made between May and September. A large part (65%) of visitors to the capital who used the services of accommodation establishments arrived between April and October.

The distribution of visits by international tourists and by domestic tourists is different across the year.

A larger part of international tourists (44%) visited Tallinn between May and August. Visits by domestic tourists increased in the second half of the year (the period of September to December saw 39% of all domestic tourists who visited Tallinn during the year).

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

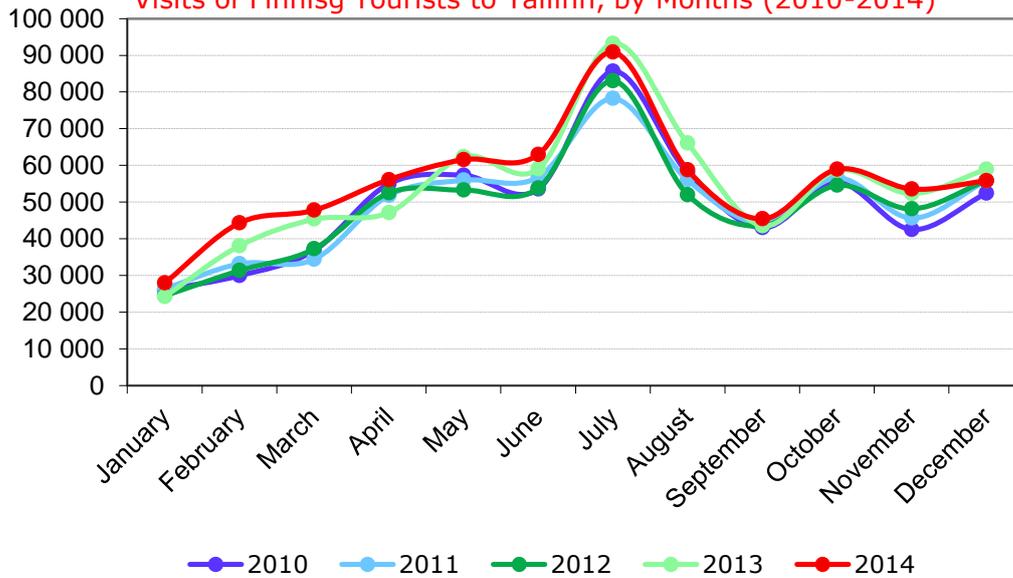
Distribution of International and Domestic Tourists by Month (2014)



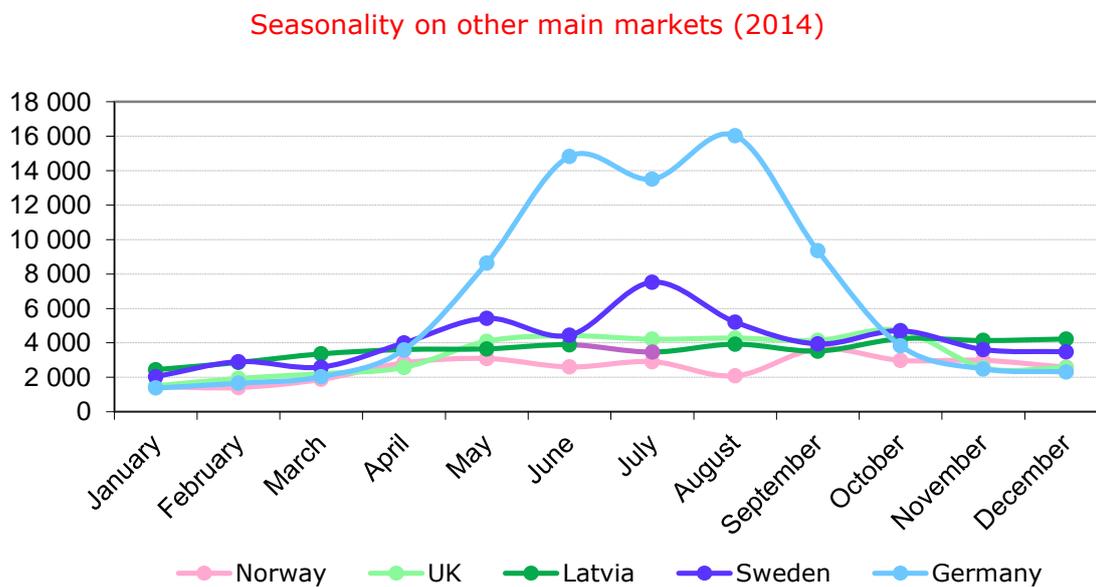
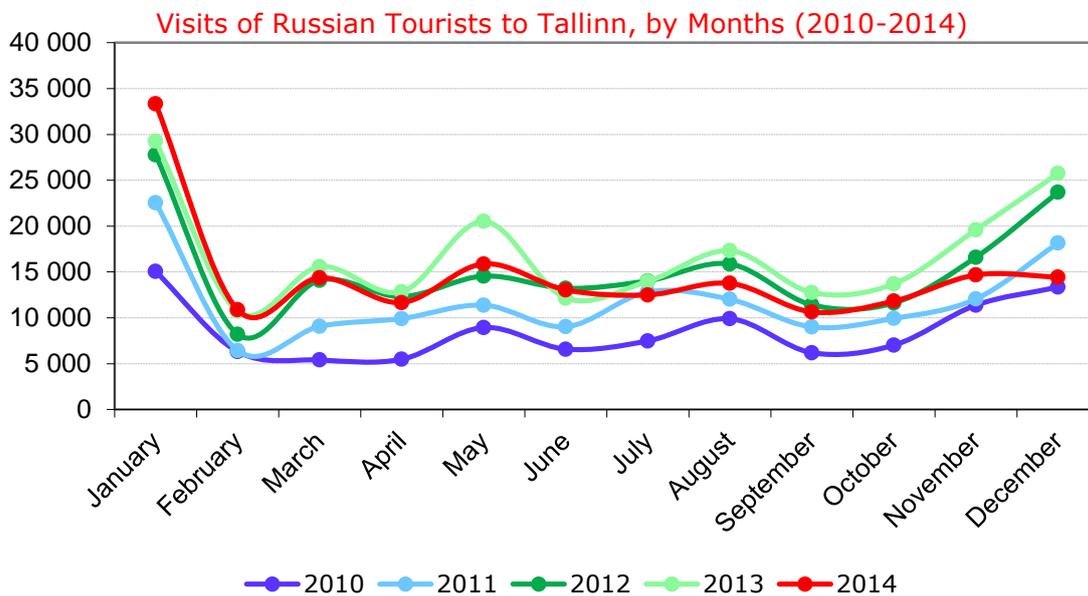
Seasonality can also be seen across target markets.

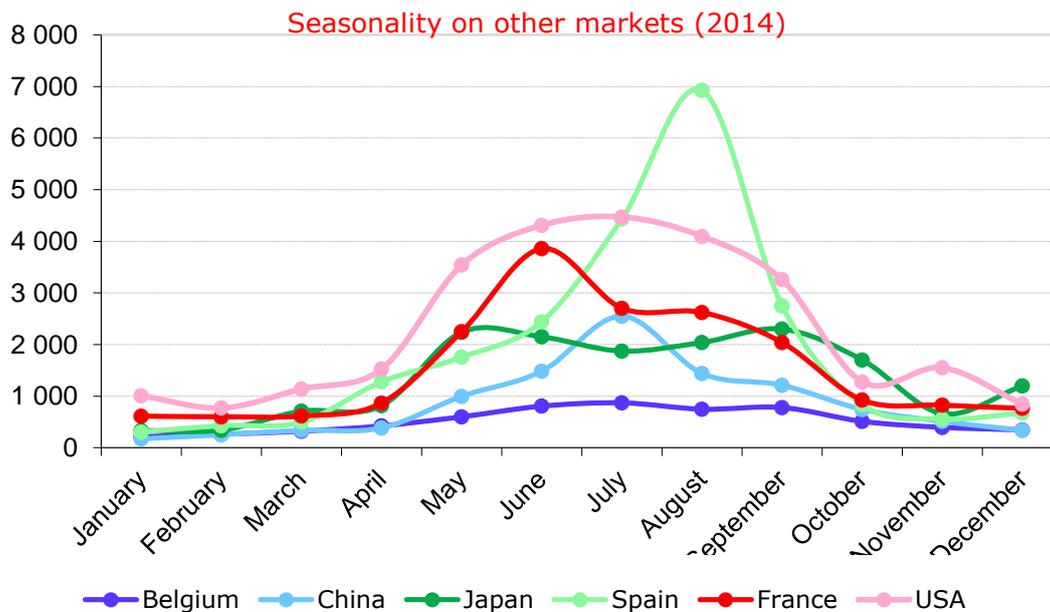
Finnish tourists tend to visit Tallinn in the summer months.

Visits of Finnish Tourists to Tallinn, by Months (2010-2014)



Tourists from Russia have traditionally been coming to Tallinn at the end and the beginning of the year. The number of visits by tourists from Russia fell significantly in 2014, compared to the previous year.





The Profile of Tallinn's Foreign Visitors

The survey of the foreign visitors of Tallinn conducted by TNS EMOR (2015) shows that the men/women and age groups ratio of foreign visitors to Tallinn are roughly the same. However, there are some differences in the types of foreign visitors.

Those who stay in accommodation establishments are more likely men, while women are more likely to stay with their friends or family. Among those that stay at accommodation establishments, the age group of 45-54 dominates, while cruise ship passengers tend to be elderly, from the 65+ age group.

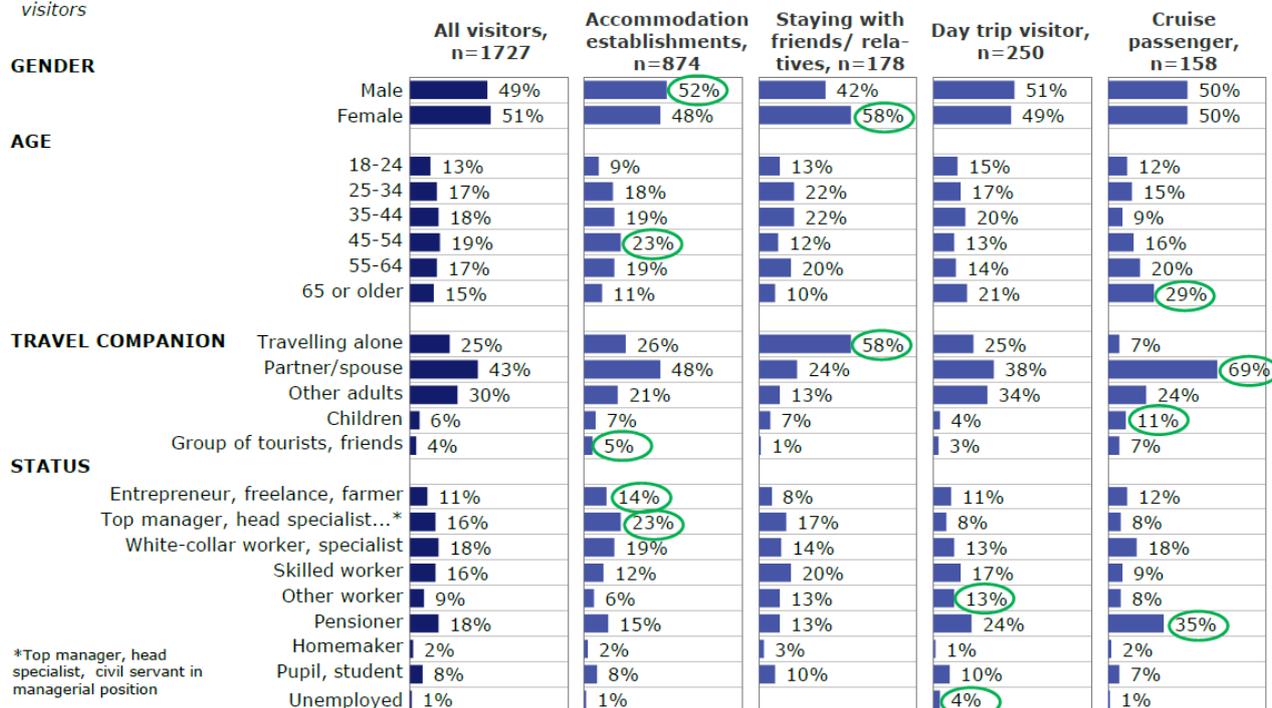
The most popular way to travel is with one's partner/spouse (43%), while one in every four visitors comes to Tallinn alone.

45% of the total number of foreign visitors are made up of entrepreneurs, top managers and other office workers, who are more likely to stay in paid accommodation. The number of retirees is larger among cruise passengers and the number of unemployed people or blue-collar workers is larger among same day passengers.

The Profile of Tallinn's Foreign Visitors, 2014

% of all visitors, incl. cruise passengers, n=1727

○ notes the statistically significantly larger share of the target group compared to the average of all visitors



*Top manager, head specialist, civil servant in managerial position

A more detailed overview of the profile of a foreign visitor to Tallinn, and across the main target countries, can be found in the report of the survey of foreign visitors to Tallinn by TNS EMOR.

Purposes of Travel of Visitors of Tallinn

According to the survey of foreign visitors to Tallinn by TNS EMOR (2015), the most common purpose of travel for foreign visitors to Tallinn is a holiday trip lasting several days (36%), and for one in every four visitors it was a one-day holiday trip. Other significant purposes of travel include business-related issues (13%), purchase of goods and services (11%) and visiting of friends and relations (10%).

Visitors from the UK (50%) and Germany (50%) are more likely to describe their trip as a holiday lasting several days, while Finns are more likely (34%) to describe their stay as a one-day holiday trip. Latvians (46%), Norwegians (28%) and Germans (23%) dominate among those who come to Tallinn for business reasons. Finns (17%) and Russians (16%) are more likely to come to Tallinn to purchase goods and services. Among those that come to Tallinn to pay a visit to their friends and relations, tourists from Latvia (20%), UK (19%) and Russia (18%) dominate.

Half (56%) of those who came to Tallinn for a multiple-days holiday, to visit friends or relations, or to visit a cultural event, saw their trip to Tallinn first of all as a slight diversion. Visitors from the neighbouring countries of Latvia (83%), Finland (69%) and Russia (62%) are more likely to describe their trip to Tallinn as

a slight diversion. Visitors from Germany are more likely to describe their trip to Tallinn as their main holiday, and visitors from Sweden and Germany as their second holiday.

Purpose of the trip

Day trips play a significant role

% of all visitors, n=1569

Which of the following best describes the purpose of your visit to Tallinn?



Source: TNS EMOR (2015)

Purposes of Tourists Staying in the Accommodation Establishments of Tallinn.

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

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

Holiday tourists dominated among visitors to the accommodation establishments of Tallinn in 2014 (73%), and the number of holiday tourists increased by 3% compared to 2013.

Business-related trips accounted for 25% of all visits - 21% (332,997) of the visitors to Tallinn came here for business meetings and 4% (61,048) for conferences or training. The share of those tourists who travelled for other purposes made up 2% (32,319) of all tourists.

Table 7. Domestic and international tourists in the accommodation establishments of Tallinn by their purposes of travel (2014)

Purpose of travel	Domestic and international tourists accommodated (2014)			
	Share	Number	Change 2013/2014	
			%	Number
Total	100%	1,603,204	+3%↑	+41,527
Holiday	73%	1,176,840	+3%↑	+32,249
Conference, training	4%	61,048	+7%↑	+4,203
Business trip	21%	332,997	+2%↑	+6,689
Other trip	2%	32,319	-5%↓	-1,614

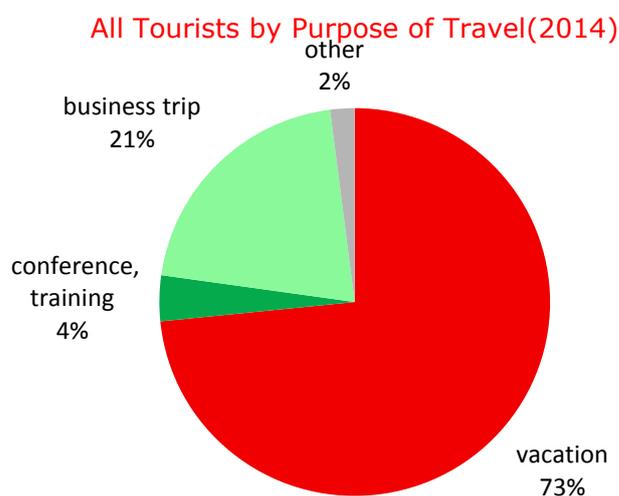


Table 8. International tourists in the accommodation establishments of Tallinn by their purposes of travel (2014)

Purpose of travel	International tourists accommodated (2014)			
	Share	Number	Change 2013/2014	
			%	Number
Total	100%	1,412,001	+2%↑	22,950
Holiday	74%	1,048,490	+1%↑	8,095
Conference, training	4%	53,609	+6%↑	3,039
Business trip	20%	282,682	+5%↑	13,919
Other trip	2%	27,220	-7%↓	-2,103

International Tourists by Purpose of Travel (2014)

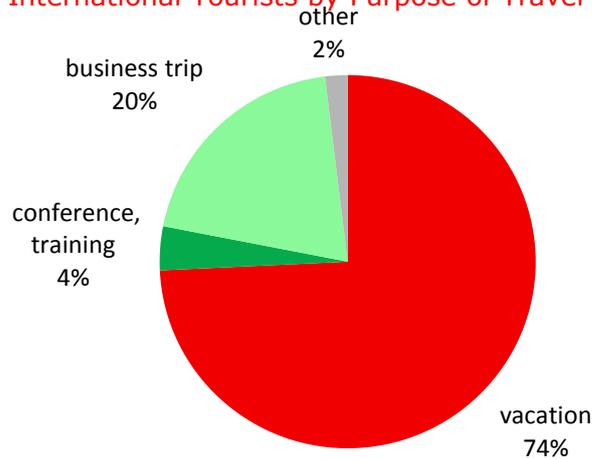
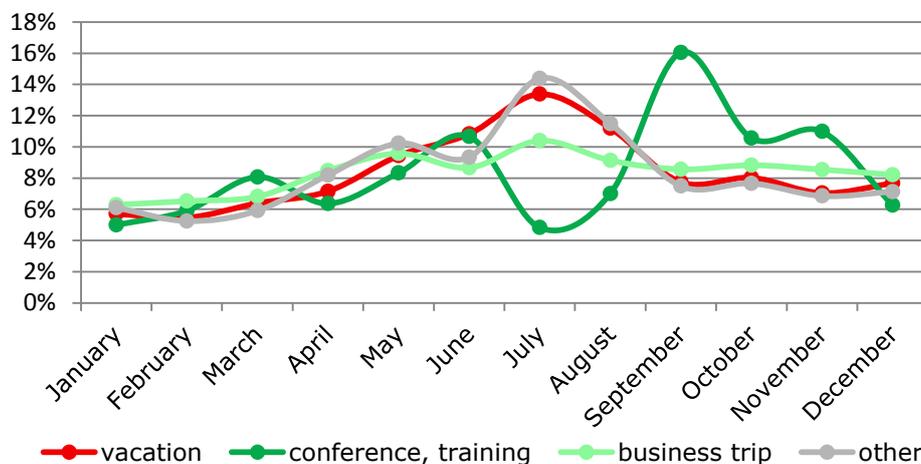


Table 9. Domestic tourists in the accommodation establishments of Tallinn by their purposes of travel (2014)

Purpose of travel	Domestic tourists accommodated (2014)			
	Share	Number	Change 2013/2014	
			%	Number
Total	100%	191,203	+11%↑	+18,577
Holiday	67%	128,350	+23%↑	+24,154
Conference, training	4%	7,439	+19%↑	+1,164
Business trip	26%	50,315	-13%↓	-7,230
Other trip	3%	5,099	-17%↓	+489

Holiday travellers mostly visited Tallinn in the summer months - 35% of the holiday trips took place during the three summer months. In the distribution of business trips to Tallinn, there is almost no seasonality; September was the high time for conference trips, and conferences were visited more than the year's average in June, October and November. Compared to 2013, there were no significant changes in the seasonality of business trips; in 2013, the "peak" period of conference trips was October.

Seasonality by Purpose of Travel (2014)



Length of Trip

The average length of a trip in 2014 was **1.78 nights**, which is 1% less than the previous year.

Domestic tourists spent an average of 1.66 nights, which is shorter by 3% compared to the same period the year before.

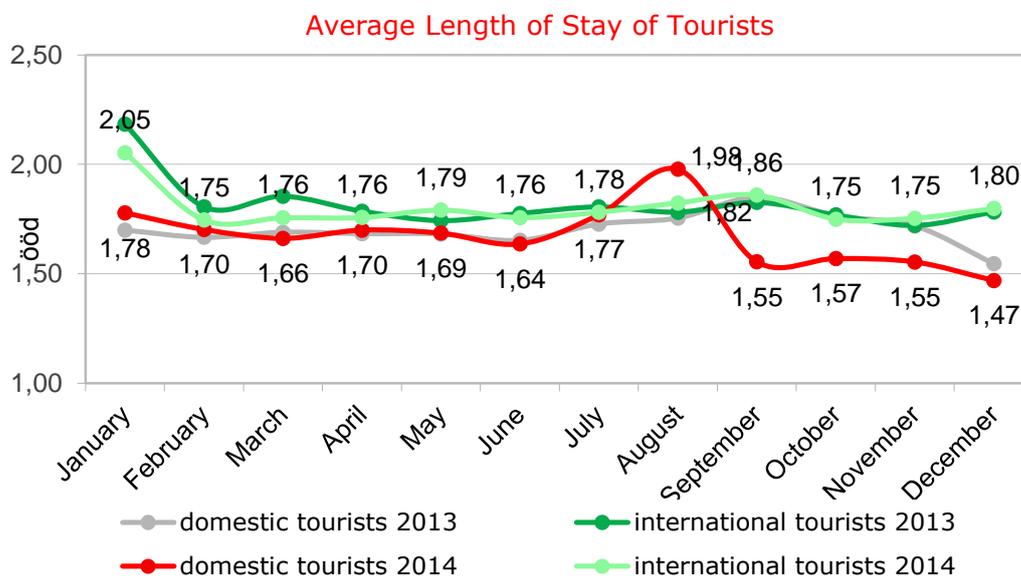
International tourists spent an average of 1.80 nights, which has not changed compared to the same period the year before.

The longest stays were by passengers from

Spain 2.41 nights -1%↓
Italy 2.37 -1%↓
France 2.34 -4%↓

The shortest stays were by passengers from

Finland 1.49 nights -1%↓
Latvia 1.60 nights +3%↑



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

Table 10. Length of trip across purposes of travel 2014

	Domestic tourists	International tourists	Total
Vacation	1.51	1.75	1.73
Business trips	1.81	1.85	1.84
incl. conference, training	1.58	1.75	1.73
incl. other business trip	1.85	1.87	1.86
Other	3.69	2.90	3.02
Total	1.66	1.80	1.78

Business and Conference Tourism

In 2014, more than a half (58%) of all business travellers who stayed in the accommodation establishments of Estonia did so in Tallinn.

Of all the visitors who stayed in the accommodation establishments of Estonia, 676,983 tourists (22%) were on a business trip, and out of them, 391,837 (58%) stayed in the accommodation establishments of Tallinn.

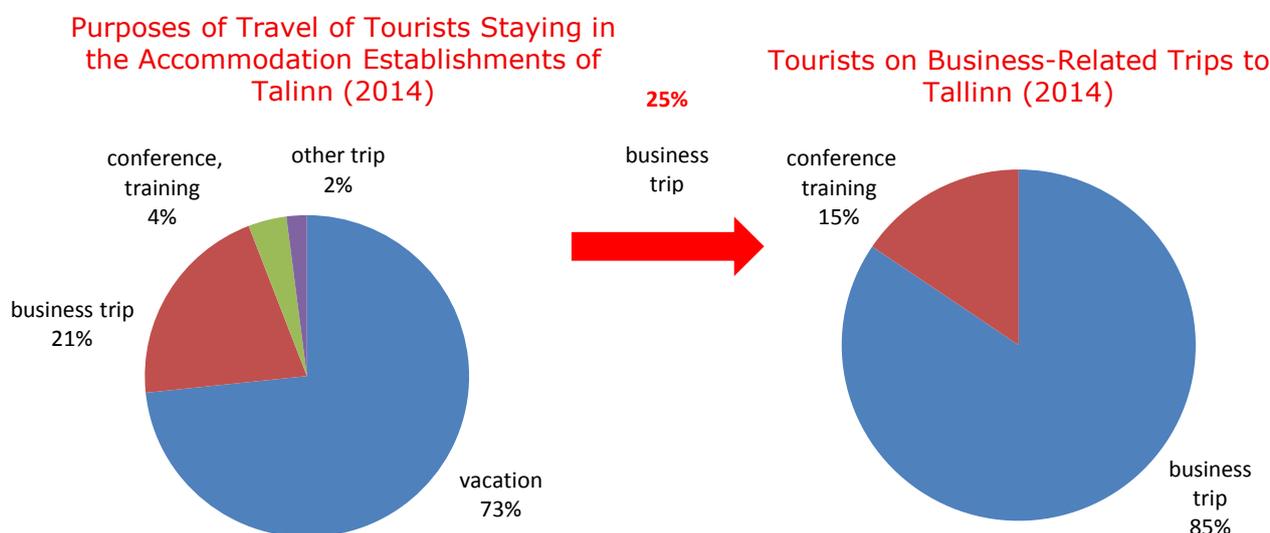
The proportion of business travellers who stay in Tallinn out of all who come to Estonia has started to rise in 2014 after five years of stability (see Table 11).

Table 11. Business travellers who stayed in the accommodation establishments of Estonia and the share of those who stayed in Tallinn

	2010	2011	2012	2013	2014
Business trips to Estonia total	546,538	644,353	665,528	689,222	676,983
Business trips to Tallinn	312,990	369,096	378,000	383,153	391,837
Share of those who stayed in Tallinn	57%	57%	57%	56%	58%

Source: Statistics Board (2015)

Of the business-related trips of tourists who stayed in the accommodation establishments of Tallinn, 85% are business trips and 15% are conference trips. The share of business-related trips among the purposes of travel to Tallinn has increased by 1 percentage point in a year-to-year comparison, and the market share of conference trips by 7 percentage points.

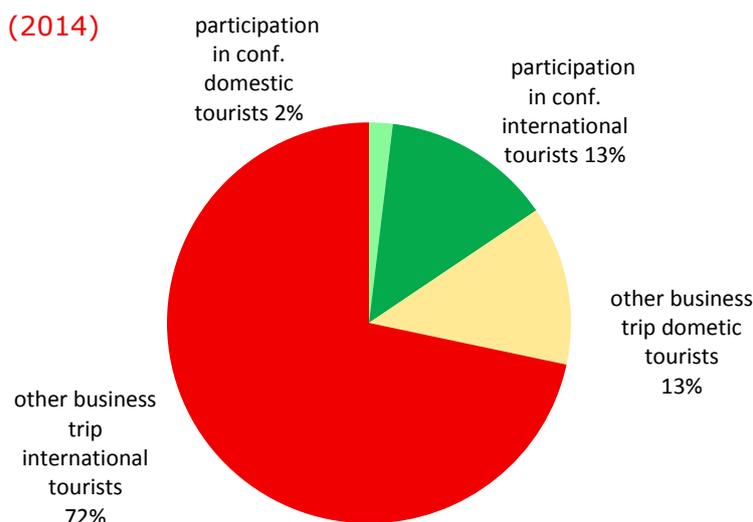


Of the accommodated **business-related travellers, 85% came from foreign countries and 15% were local**. Compared to 2013, the number of domestic business tourists decreased by 10% (-6,156 tourists), while the number of international business tourists increased by 5% (+14,840 tourists).

Of the accommodated **conference tourists, 88% (53,609 persons) were international tourists and 12% (7,439 persons) were domestic tourists.**

The majority (72%) of business-related trips were taken by international business tourists. Business trips by Estonians accounted for 13% of all business-related trips, the conference trips by international tourists for 14% and the share of conference trips/participation in seminars by Estonians is quite small (2%).

Tourists on Business-Related Trips in the Accommodation Establishments of Tallinn



The number of accommodated **conference tourists grew by 7%** compared to the year before, and the number of business tourists grew by 1%. And **the number of foreign conference tourists grew by 6%** (almost 3,000 persons), while **the number of local conference tourists grew by 18%** (1,000 persons). The number of foreign conference tourists accommodated increased (+6%, almost 15,000 persons), while the number of Estonian business travellers who stayed at accommodation establishments decreased (-13%, almost 7,000 persons).

The length of business trips did not change in 2014 compared to the previous year. The average **length of a business trip was 1.84 nights**; incl. **1.73 nights for conference trips** and **1.86 nights for business trips**. For comparison, the average stay of holiday tourists in the accommodation establishments of Tallinn was 1.73 nights.

The number of conference tourists accommodated was highest in September, and this number was also above the year's average in **June, October and November**. From other countries, the number of tourists who came for conferences was highest in September, while the number was highest for domestic tourists in October and November.

A more detailed overview of the business and conference trips to Tallinn in 2014 is available in the Tallinn Conference Events Overview (2015).

Accommodation Establishments in Tallinn

The accommodation establishments of Tallinn (2010–2013).

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

Source: The Tourism Department of the Tallinn City Enterprise Board, Statistics Board

Accommodation establishments, rooms and beds in 2014 (Statistics Board 2015)

	Number of establishments	Rooms/cabins	Beds
January	123	7,075	14,651
February	124	7,067	14,608
March	116	6,893	14,260
April	117	6,900	14,296
May	121	6,969	14,424
June	123	7,050	14,424
July	122	7,038	15,303
August	123	7,055	15,310
September	119	7,090	15,409
October	115	7,058	15,274
November,	113	7,023	15,214
December	114	7,028	15,275

Source: Statistics Board

The sample of the Statistics Board does not include accommodation establishments with fewer than 5 beds. Data is collected by establishments. The actual number of providers of accommodation services is higher, but there are no data about them, as the registration obligation of accommodation establishments in the Register of Economic Activities ended from 1 July 2014.

Based on the information published in Internet portals, the data about establishments providing accommodation services in Tallinn is the following:

In the Airbnb database, there are a total of 453 providers of accommodation in Tallinn (as of 10 April 2015).

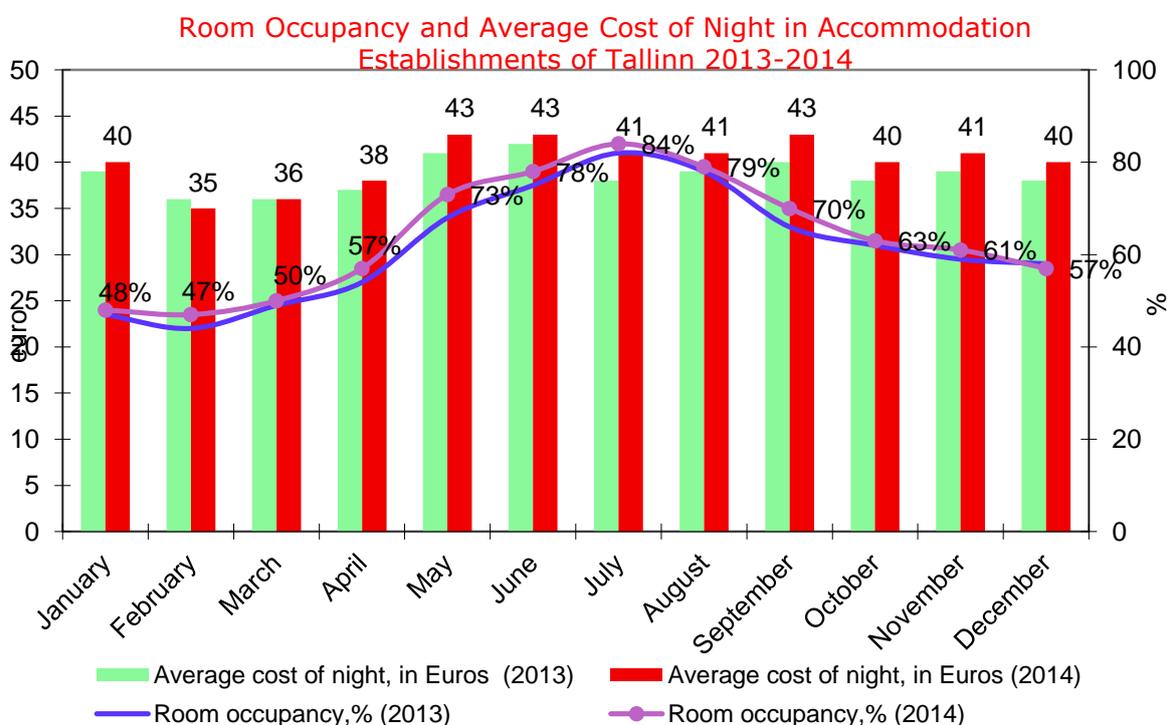
Booking.com lists 344 providers of accommodation, including: guest apartments - 234, hotels - 65, hostels - 27, guest houses - 9, villas - 3, providers of home accommodation - 3, holiday homes - 1, Bed and Breakfast -1 and camping areas - 1 (as of 10 April 2015).

The number of providers of accommodation services tends to vary seasonally - here's the data as of 27 May 2015: the airbnb database has 705 providers and booking.com has 351.

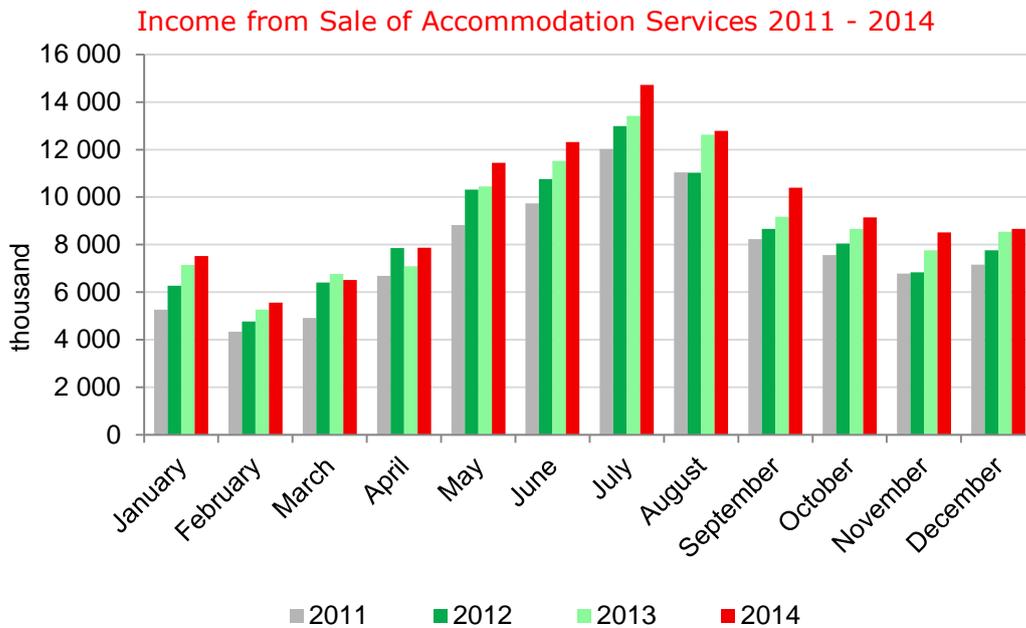
Occupancy of rooms in accommodation establishments.

According to data collected by the Statistics Board, the average occupancy rate of rooms in the accommodation establishments of Tallinn in 2014 was 64% (an increase of 3%). The occupancy rate varies by month - it was the lowest in February, when 47% of the rooms on offer were occupied, and highest in July (84%).

The average price for a night was 40 Euros, which is 4% higher than in the previous year. The average price for accommodation was highest in May, June and September (43 Euros) and the price for a night was lowest in February (35 Euros).



The accommodation establishments of Tallinn earned a total of 115,451,872 Euros for the sales of accommodation services, which is 6% more than in 2013.



Tourism Income in Tallinn

According to Eesti Pank (2015), foreign visitors consumed goods and services in Estonia for a total of 1,079.5 million Euros. Considering the regional distribution of foreign visitors and the structure of travel-related expenditures by foreign tourists, we can estimate Tallinn's share in the export of travel services of Estonia at 80-85%. Therefore, the estimated export of tourism services of Tallinn (expenditures of foreign visitors in Tallinn) is somewhere between 836.6 and 917.5 million Euros.

According to the survey of foreign visitors to Tallinn (TNS EMOR 2015), **foreign tourists** (excluding cruise passengers) left an estimated **877–951 million Euros in Tallinn in 2014** and cruise passengers **14–18 million Euros**.

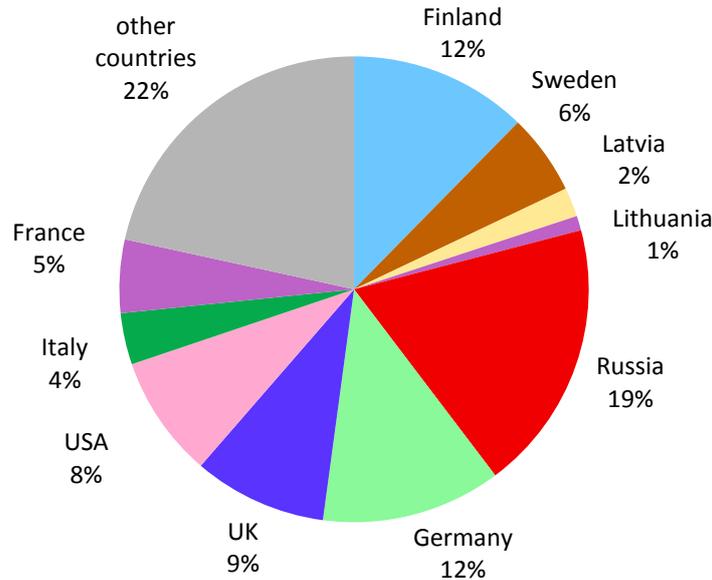
Visiting of Tallinn's Tourist Information Centre and Tallinn Tourist Information Channels

More than 247,000 visitors paid a visit to the Tallinn Tourist Information Centre in 2014, which is 16% more than in the year before. As in the previous year, 95% of the consumers of the services provided by the Tourist Information Centre were foreigners and 5% were locals.

87% of visitors find information on their own from the exhibited materials (219,434 persons) and 13% of all visitors (27,792) turned to the staff for information. In addition to that, the employees answer to queries that come by phone or by email.

Visitors who turned to the service employees came from almost 90 different countries.

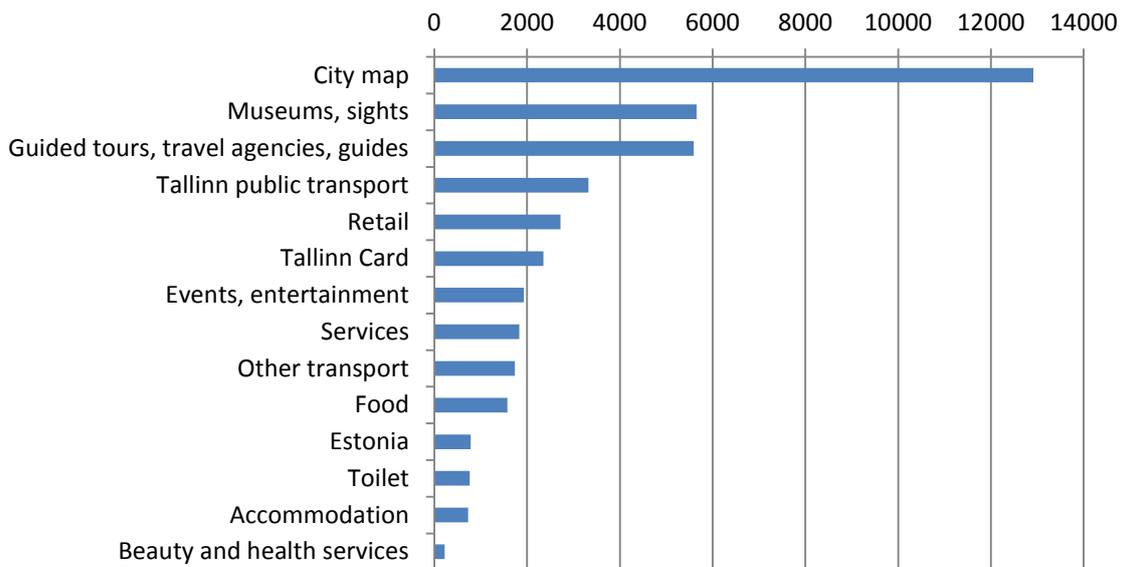
Visitors of Tallinn Tourist Information Centre by Country (2014)



About one fifth of the information requests are made by visitors from Russia. Germans account for a little more than one tenth and Finnish people are in the same range. They are followed by British, Americans, Swedes and the French. Other countries: Albania, Algeria, Costa Rica, Cuba, Kuwait, Nepal, Pakistan, Peru, Madagascar, the island of Niue, the Republic of Senegal, Sri Lanka, Chechnya, Uganda, Uruguay, Vietnam, the islands of New Caledonia and many others.

In addition to the visitors who turn up, tourist information is also given out by phone and email.

Queries in Tallinn Tourist Information Centre (2014)



The main interest points in the Information Centre are the sights, museums and guided tours; people also want a map of the city. Information about public transport is also sought.

Issues of interest include events, food, shopping and other services. Also information about the weather, other destinations in Estonia and in-country public transport is sought.

Visits to the Tourist Website in 2014

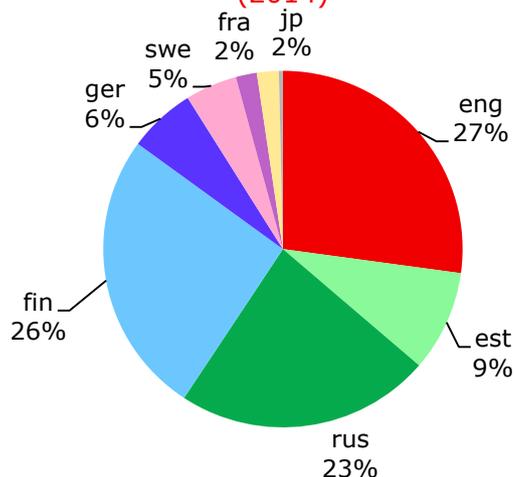
Tallinn's tourist website tourism.tallinn.ee was viewed almost 7 million times in 2014 (+22%). The number of users has grown +9% (1,157,499 users) and they have opened the web (started sessions) 1.7 million times (+6%).

The mobile platform www.tallinn.mobi was viewed 201,368 times (30,570 users started a total of 41,271 sessions).

Visits in Various Language Environments

Visiting numbers are highest for the English section of the Tourist website (1,898,572 page views), followed by the Finnish (1,801,498 page views), Russian (1,605,175 page views) and Estonian sections (639,723 page views).

Views of Tourist website by Language Environments (2014)

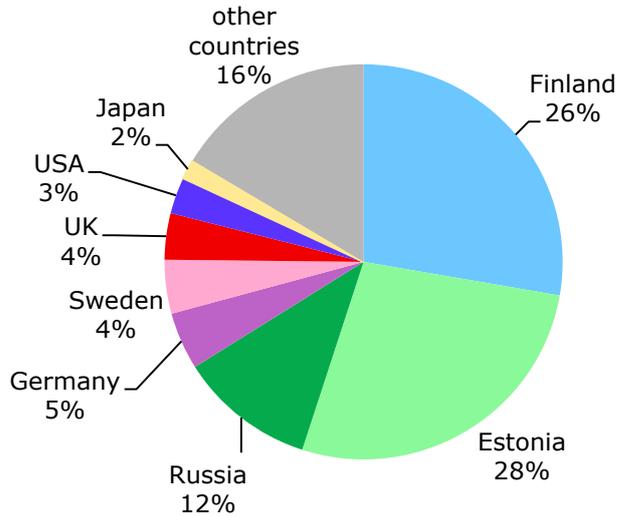


Compared to visits in 2013, the viewing of the Finnish section grew significantly in 2014 (+49%) and so did that of the French section (+40%), followed by visits to the Swedish (+28%), German (+23%) and Estonian sections (+19%).

Visitors by Country

The number of page views is highest for visitors from Estonia (28%), Finland (26%) and Russia (12%). The number of individual users is highest for Finland (328,323), Estonia (322,944), Russia (131,265), Germany (55,591) and Sweden (52,141). In terms of percentage, the numbers of visitors from Estonia and Finland experienced the highest growth rate compared to last year.

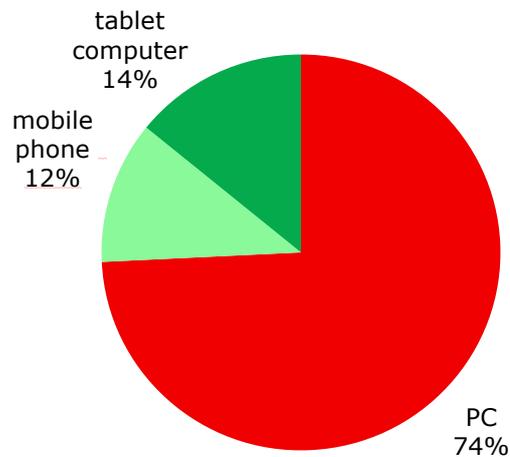
Visits of Tallinn Tourist Website by Countries (2014)



Users by Device Type

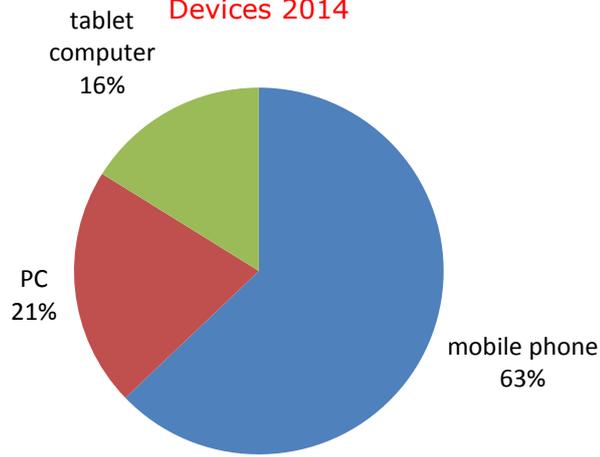
A typical user of the Tallinn Tourist website uses a PC. There is a rising trend of using mobile devices as well: Compared to 2013, the number of users of mobile devices (+106%) and tablet computers (+44%) have risen significantly.

Visits of Tallinn Tourist Website by Devices 2014



The mobile platform www.tallinn.mobi was visited 41,271 times, mostly by mobile phone.

Visits of Tallinn Tourist Website www.tallinn.mobi by
Devices 2014

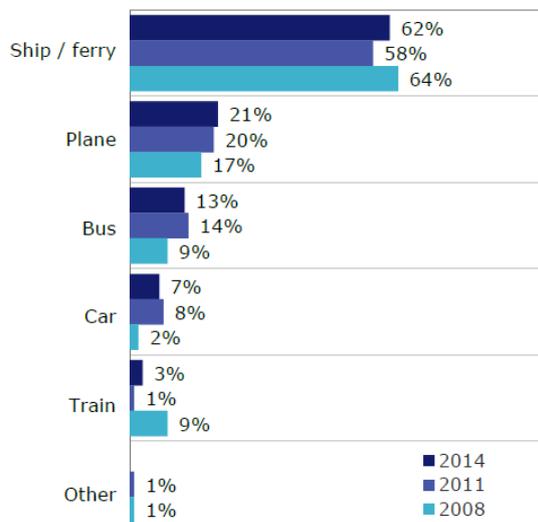


Arriving in Tallinn

Visitors arrived in Tallinn overland by car, bus or train, as well as by ships and planes. According to the survey of foreign visitors to Tallinn by TNS EMOR, most foreign tourists come to Tallinn by ship or ferry.

% of visitors to Tallinn, n=1569

Which mode of transportation did you use to arrive in Tallinn?

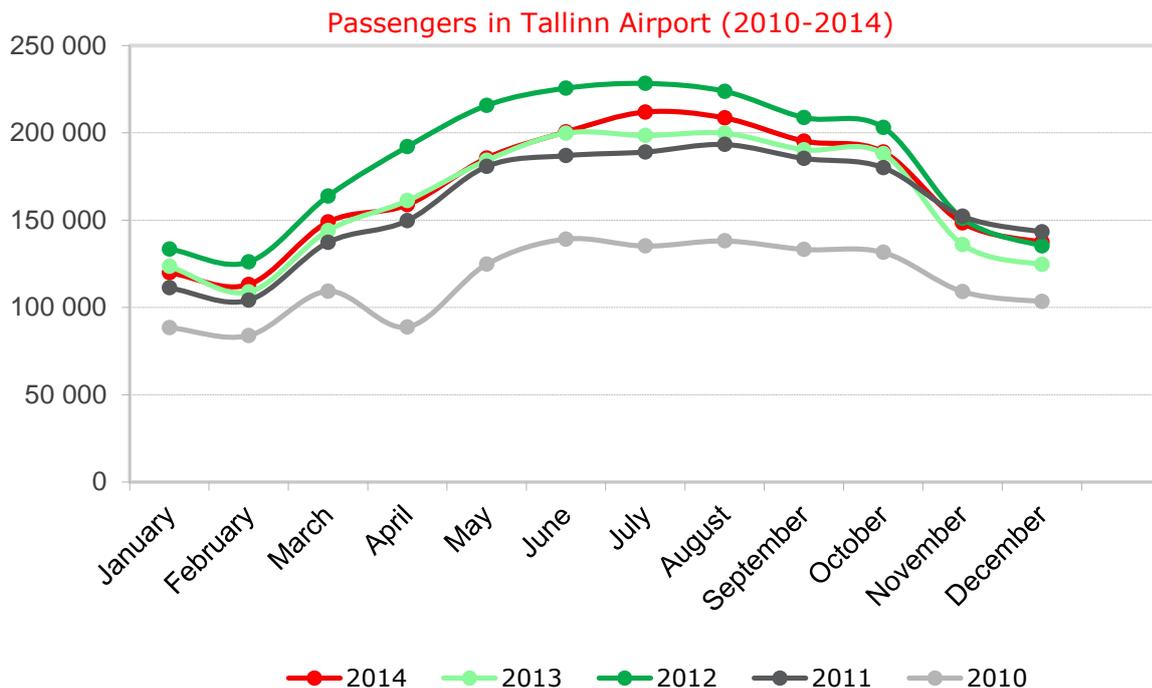


Source: TNS EMOR (2015)

The following shows the numbers of passengers from the main "gates" of Tallinn, i.e. the Tallinn Airport and the Port of Tallinn.

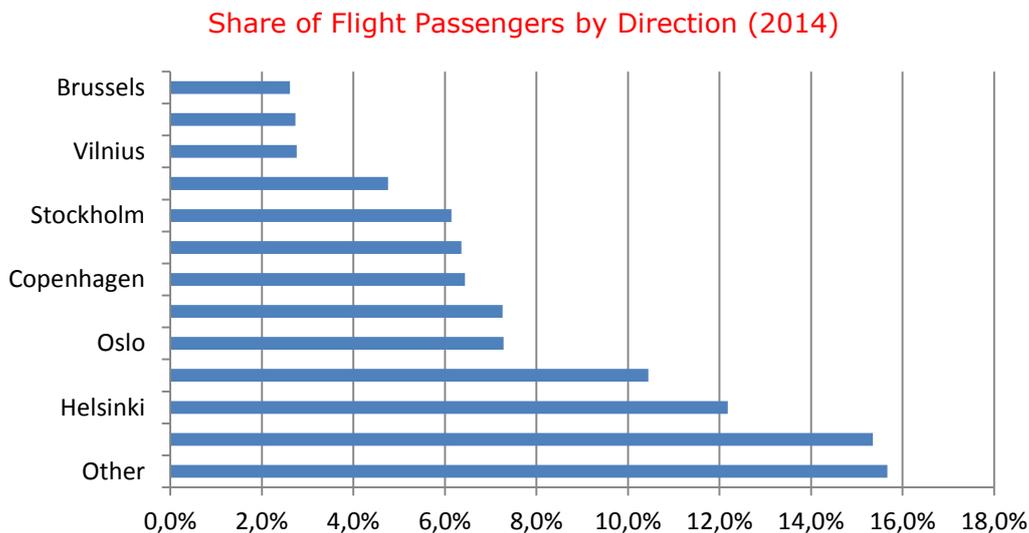
Number of flight passengers in Tallinn Airport

In 2014, more than 2 million passengers passed through Tallinn Airport (2,017,371), which an increase of 3% compared to last year (Tallinna Lennujaam, 2015). The number of passengers increased more in the second half of the year.



Source: Tallinna Lennujaam (2015)

The majority of passengers were those on international flights (99%). 34 airlines were in operation in 2014. The most frequently taken directions were Frankfurt (15.4% of all flight passengers), Helsinki (12.2% of all flight passengers) and Riga (10.4% of all flight passengers).

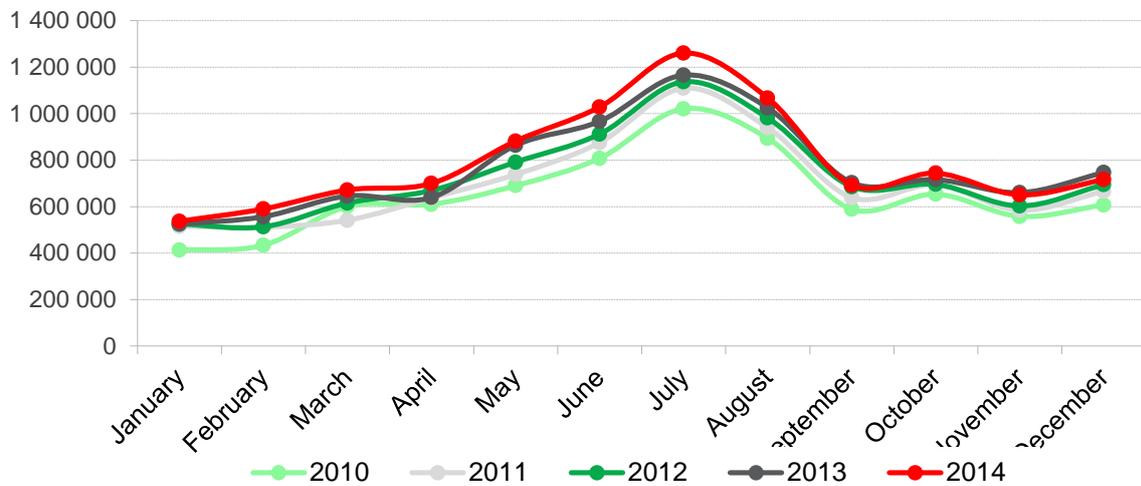


Source: Tallinna Lennujaam (2015)

Number of ship passengers in Tallinn's Old City Harbour

Tallinn's Old City Harbour was passed through by 9,541,210 passengers, which represents a 4% increase compared to 2013.

Passengers in Tallinn's Old City Harbour by Month (2010-2014)

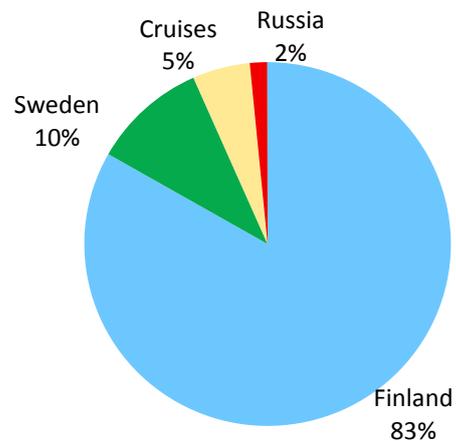


Source: Tallinna Sadam (2015)

Passengers total 9,541,210 +4%.

Tallinn-Helsinki	7,986,688	passengers
Tallinn-Stockholm	973,644	passengers
Tallinn-St. Petersburg	146,971	passengers
Cruise passengers	486,624	passengers

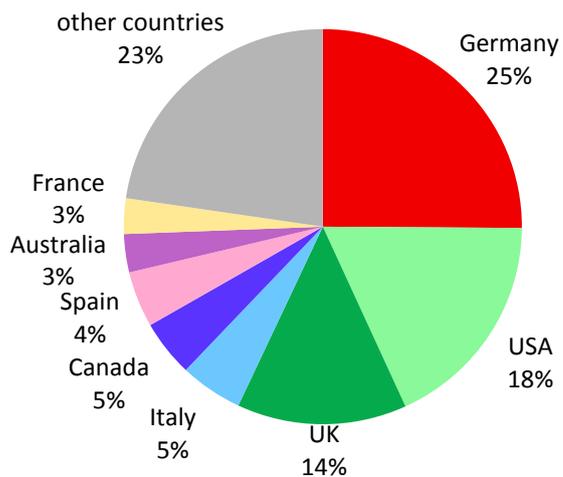
Share of Ship Passengers by Direction (2014)



Source: Tallinna Sadam (2015)

Cruise passengers from 154 countries arrived in Tallinn in 2014.

Cruise Passengers by Country (2014)



Source: Tallinna Sadam

Conclusions

Approximately 3.81 million foreign tourists arrived in Tallinn in 2014, which is an all-time record.

Half (51%) of the visitors to the city stayed here for a night, which means 1.94 million foreign visitors, out of whom 37% spent a night in a paid accommodation establishment and 14% stayed at their friends/relatives. 1.4 million foreign visitors spent just a single day in Tallinn, and there were 0.470 million cruise passengers in 2014, i.e. 12%.

A total of 1.6 million tourists stayed in the accommodation establishments of Tallinn, which is an increase of 3% over 2013. 88% of all visitors accommodated in Tallinn were international tourists and 12% were domestic tourists. All in all, tourists spent 2.8 million nights in Tallinn.

Tallinn continues to be valued as a holiday destination. 73% of the visitors who stayed at the accommodation establishments of Tallinn were here for their holidays, 21% came for business meetings, 4% participated in conferences or training sessions and 2% were in town for other reasons. Compared to 2013, the number of those who participated in conferences and trainings grew significantly (+7% of all tourists), and this was especially notable for domestic tourists.

Visits to Tallinn tend to be distributed unevenly across months - most visits occur during the three months of summer - and the trips are rather short (an average of 1.78 nights).

Accommodation establishments earned 115 million Euros from the sale of accommodation services, and foreign visitors purchased goods and services for an estimated 900 million Euros while in Tallinn.

The main way of arriving in Tallinn was by ship (9.5 million passengers, i.e. +4%) and by plane (2 million passengers, i.e. +3%).

Interest in the Tallinn Tourist Information Centre has increased. The Tallinn Tourist Information Centre was visited by more than 247,000 visitors this year, and the Tallinn Tourist website was viewed almost 7 million times.

Table 12: Tourists accommodated in Tallinn (2014), the number of nights spent by them and the length of their trip.

Country of origin	Accommodated (2014)			Overnight stays (2014)			Length of trip (nights)
	number	Change 2013/2014		number	Change 2013/2014		
		%	number		%	number	
Total	1,603,204	3	41,527	2,855,048	2	52,937	1.78
International tourists	1,412,001	2	22,950	2,537,840	1	29,694	1.80
Domestic tourists	191,203	11	18,577	317,208	8	23,243	1.66
African countries	1,677	19	266	4,142	15	525	2.47
incl. South African Republic	399	6	22	836	-4	-35	2.10
Albania	165	54	58	409	63	158	2.48
Asian countries	44,899	36	11,946	75,528	33	18,893	1.68
incl. China	10,429	54	3,647	16,928	24	3,233	1.62
incl. Japan	16,369	66	6,511	28,047	59	10,389	1.71
incl. South Korea	6,433	1	47	9,444	17	1,392	1.47
Australia, Oceania	7,692	27	1,633	17,406	28	3,783	2.26
incl. Australia	6,737	28	1,490	15,306	30	3,544	2.27
incl. New Zealand	0	0	0	0	0	0	0
Austria	6,218	32	1,514	14,101	16	1,908	2.27
Belgium	6,284	4	255	13,626	4	582	2.17
Bulgaria	1,404	14	173	3,350	13	383	2.39
Canada	4,114	38	1,124	10,199	47	3,277	2.48
Countries of Southern and Central America	6,039	15	783	13,033	23	2,454	2.16
incl. Brazil	2,404	-14	-385	4,824	-17	-975	2.01
Croatia	674	5	34	1,626	-26	-580	2.41
Cyprus	381	25	76	927	25	188	2.43
Czech Republic	4,258	4	177	10,886	19	1,757	2.56
Denmark	9,100	-4	-333	19,025	4	668	2.09
Finland	664,045	2	15,183	989,636	2	15,000	1.49
France	18,691	5	905	43,767	1	226	2.34
Germany	79,649	13	8,868	181,395	18	27,814	2.28
Greece	2,307	25	466	5,796	10	532	2.51
Holland	11,165	-4	-424	25,159	-2	-401	2.25
Hungary	2,590	-13	-376	7,205	-11	-855	2.78
Iceland	678	-35	-359	1,679	-39	-1,055	2.48
Ireland	2,407	-10	-280	5,620	-14	-948	2.33
Italy	22,421	0	36	53,183	-1	-282	2.37
Latvia	43,355	-4	-1,615	69,579	-1	-559	1.60
Lithuania	33,735	-2	-852	60,827	-6	-4,002	1.80
Luxembourg	719	-6	-42	1,597	8	123	2.22
Malta	273	-20	-69	874	6	47	3.20
Norway	30,480	-4	-1,247	71,090	-5	-3,808	2.33

Poland	18,521	-1	-169	36,455	-11	-4,537	1.97
Portugal	3,285	31	769	7,182	24	1,406	2.19
Romania	2,037	-6	-131	6,220	4	231	3.05
Russia	177,054	-13	-27,178	362,966	-13	-54,488	2.05
Slovakia	1,338	-2	-23	4502	7	311	3.36
Slovenia	1,482	43	445	3315	28	720	2.24
Spain	22,886	12	2,523	55,242	12	5,725	2.41
Sweden	49,897	-4	-2,076	83,005	-5	-4,038	1.66
Switzerland	7,257	4	302	15,209	11	1,544	2.10
Turkey	5,687	6	314	12,639	-1	-154	2.22
UK	39,214	4	1,633	87,706	0	213	2.24
Ukraine	9,875	5	446	19,620	-9	-1,923	1.99
USA	27,798	18	4,183	64,720	19	10,191	2.33
Other countries	4,804	-15	-861	9,232	-4	-387	1.92
Other European countries	35,446	16	4,873	68,162	15	9,052	1.92

Table 13: International tourists accommodated in Tallinn and their share by country out of all international tourists (2014).

Country of origin	International tourists accommodated (2014)			Share out of international tourists
	number	Change 2013/2014		
		%	number	
International tourists total	1,412,001	2	22,950	100%
African countries	1,677	19	266	0.12%
incl. South African Republic	399	6	22	0.03%
Albania	165	54	58	0.01%
Asian countries	44,899	36	11,946	3.18%
incl. China	10,429	54	3,647	0.74%
incl. Japan	16,369	66	6,511	1.16%
incl. South Korea	6,433	1	47	0.46%
Australia, Oceania	7,692	27	1,633	0.54%
incl. Australia	6,737	28	1,490	0.48%
incl. New Zealand	0	0	0	0
Austria	6,218	32	1,514	0.44%
Belgium	6,284	4	255	0.45%
Bulgaria	1,404	14	173	0.10%
Canada	4,114	38	1,124	0.29%
Countries of Southern and Central America	6,039	15	783	0.43%
incl. Brazil	2,404	-14	-385	0.17%
Croatia	674	5	34	0.05%
Cyprus	381	25	76	0.03%
Czech Republic	4,258	4	177	0.30%
Denmark	9,100	-4	-333	0.64%
Finland	664,045	2	15,183	47.03%
France	18,691	5	905	1.32%
Germany	79,649	13	8,868	5.64%
Greece	2,307	25	466	0.16%

Holland	11,165	-4	-424	0.79%
Hungary	2,590	-13	-376	0.18%
Iceland	678	-35	-359	0.05%
Ireland	2,407	-10	-280	0.17%
Italy	22,421	0	36	1.59%
Latvia	43,355	-4	-1,615	3.07%
Lithuania	33,735	-2	-852	2.39%
Luxembourg	719	-6	-42	0.05%
Malta	273	-20	-69	0.02%
Norway	30,480	-4	-1,247	2.16%
Poland	18,521	-1	-169	1.31%
Portugal	3,285	31	769	0.23%
Romania	2,037	-6	-131	0.14%
Russia	177,054	-13	-27,178	12.54%
Slovakia	1,338	-2	-23	0.09%
Slovenia	1,482	43	445	0.10%
Spain	22,886	12	2,523	1.62%
Sweden	49,897	-4	-2,076	3.53%
Switzerland	7,257	4	302	0.51%
Turkey	5,687	6	314	0.40%
UK	39,214	4	1,633	2.78%
Ukraine	9,875	5	446	0.70%
USA	27,798	18	4,183	1.97%
Other countries	4,804	-15	-861	0.34%
Other European countries	35,446	16	4,873	2.51%

Table 14: Overnight stays by international tourists accommodated in Tallinn and their share by country out of all international tourists (2014).

Country of origin	Overnight stays by accommodated international tourists (2014)			Share out of international tourists
	number	Change 2013/2014		
		%	number	
Overnight stays by international tourists total	2,537,840	1	29,694	100%
African countries	4,142	15	525	0.16%
incl. South African Republic	836	-4	-35	0.03%
Albania	409	63	158	0.02%
Asian countries	75,528	33	18,893	2.98%
incl. China	16,928	24	3,233	0.67%
incl. Japan	28,047	59	10,389	1.11%
incl. South Korea	9,444	17	1,392	0.37%
Australia, Oceania	17,406	28	3,783	0.69%
incl. Australia	15,306	30	3,544	0.60%
incl. New Zealand	0	0	0	0
Austria	14,101	16	1,908	0.56%
Belgium	13,626	4	582	0.54%
Bulgaria	3,350	13	383	0.13%
Canada	10,199	47	3,277	0.40%
Countries of Southern and Central America	13,033	23	2,454	0.51%

incl. Brazil	4,824	-17	-975	0.19%
Croatia	1,626	-26	-580	0.06%
Cyprus	927	25	188	0.04%
Czech Republic	10,886	19	1,757	0.43%
Denmark	19,025	4	668	0.75%
Finland	989,636	2	15,000	39.00%
France	43,767	1	226	1.72%
Germany	181,395	18	27,814	7.15%
Greece	5,796	10	532	0.23%
Holland	25,159	-2	-401	0.99%
Hungary	7,205	-11	-855	0.28%
Iceland	1,679	-39	-1,055	0.07%
Ireland	5,620	-14	-948	0.22%
Italy	53,183	-1	-282	2.10%
Latvia	69,579	-1	-559	2.74%
Lithuania	60,827	-6	-4,002	2.40%
Luxembourg	1,597	8	123	0.06%
Malta	874	6	47	0.03%
Norway	71,090	-5	-3,808	2.80%
Poland	36,455	-11	-4,537	1.44%
Portugal	7,182	24	1,406	0.28%
Romania	6,220	4	231	0.25%
Russia	362,966	-13	-54,488	14.30%
Slovakia	4,502	7	311	0.18%
Slovenia	3,315	28	720	0.13%
Spain	55,242	12	5,725	2.18%
Sweden	83,005	-5	-4,038	3.27%
Switzerland	15,209	11	1,544	0.60%
Turkey	12,639	-1	-154	0.50%
UK	87,706	0	213	3.46%
Ukraine	19,620	-9	-1,923	0.77%
USA	64,720	19	10,191	2.55%
Other countries	9,232	-4	-387	0.36%
Other European countries	68,162	15	9,052	2.69%

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