

Visit Tallinn

Overview of tourism trends in Tallinn in 2018

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Analyst

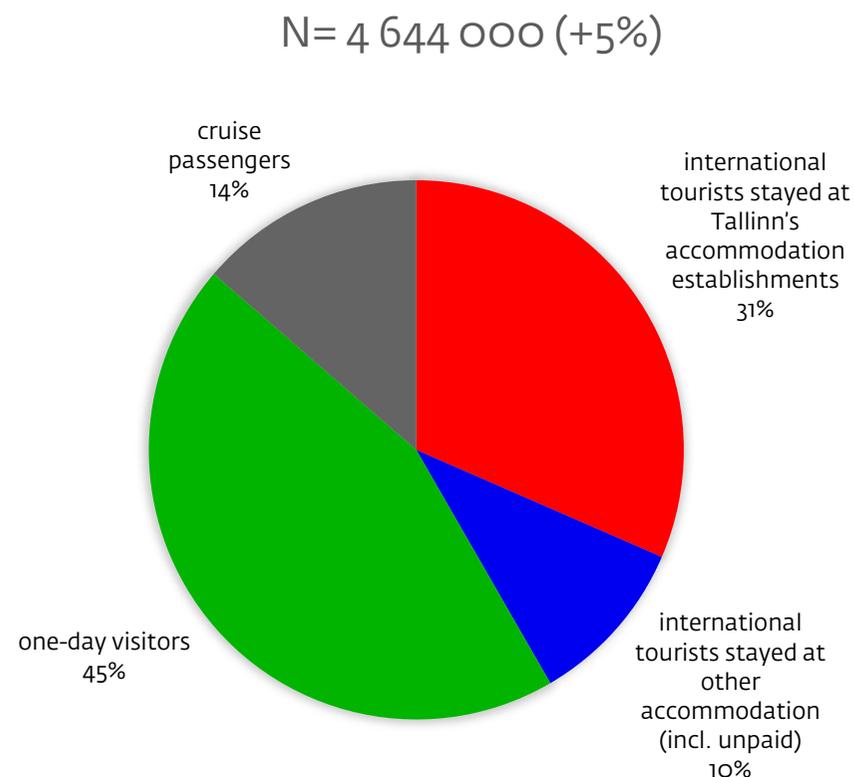
Tallinn City Tourist Office & Convention Bureau

Visits of foreign residents to Tallinn, 2018

Residents of foreign countries made **4.64 million visits** to Tallinn in 2018, which means a 5% increase compared to 2017.

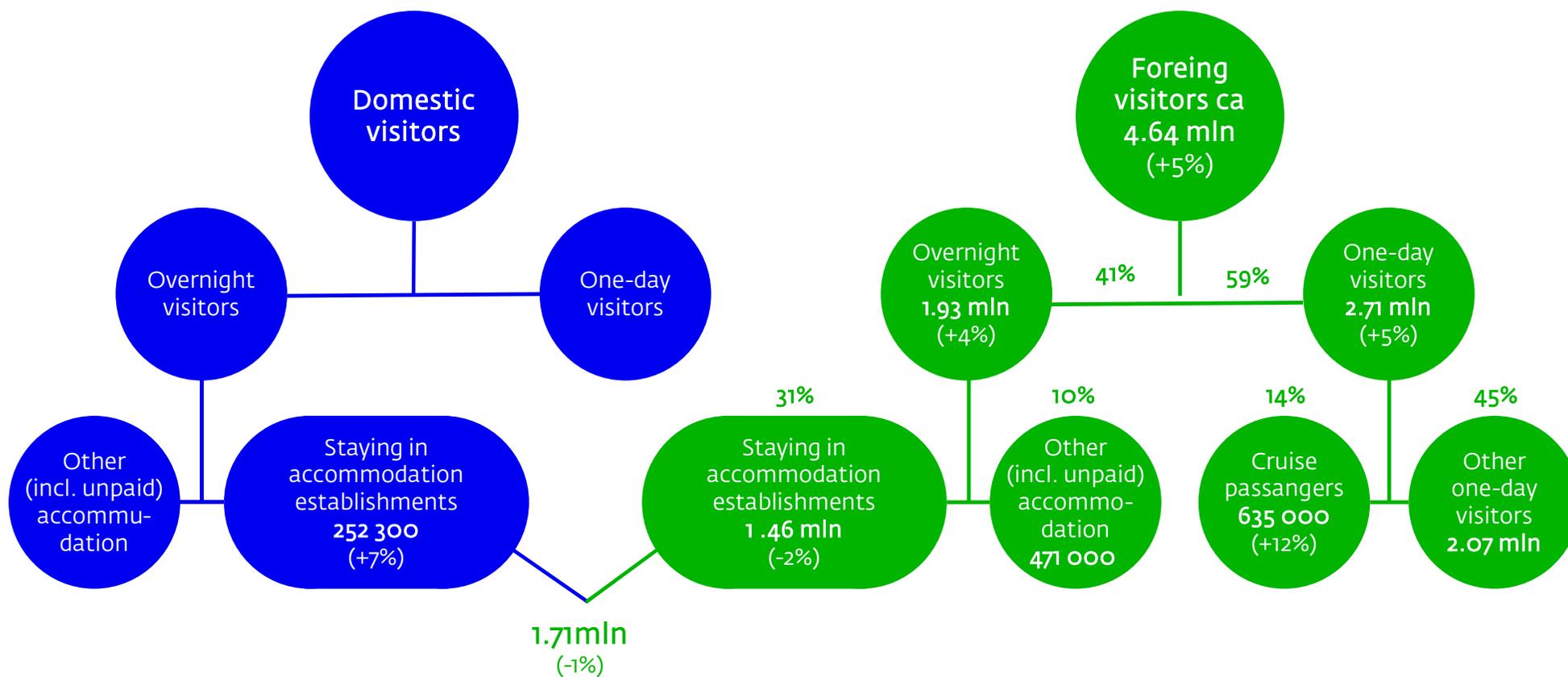
- 1.93 million visits to the city lasted for two or more days,
- 2.71 million visits lasted for one day

Compared to 2017, the number of one-day visits increased by 5% and the number of multi-day visits by 4%.



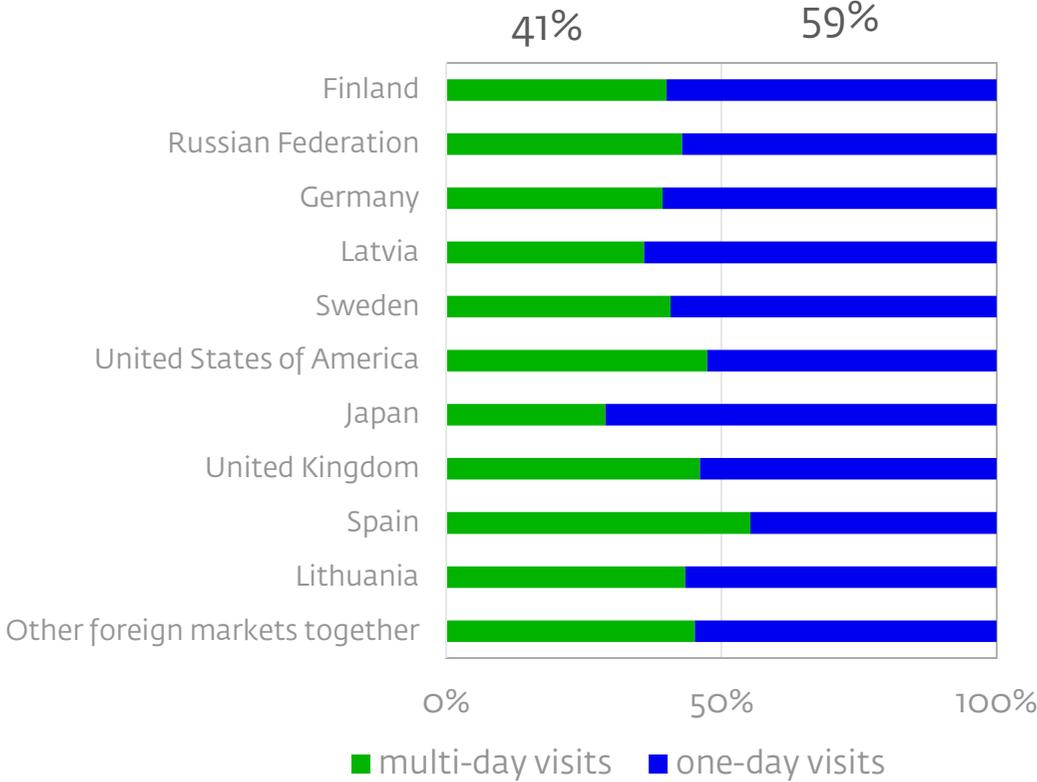
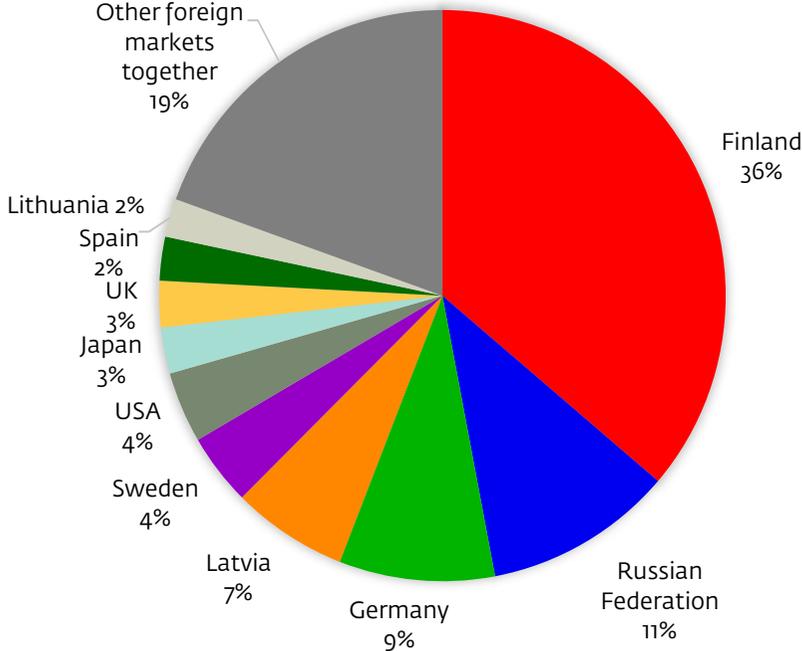
Source: Positium LBS, Statistics Estonia, Port of Tallinn (2019)

Visitors to Tallinn 2018



Visits of foreign residents to Tallinn by country

N= 4 644 000 (+5%)



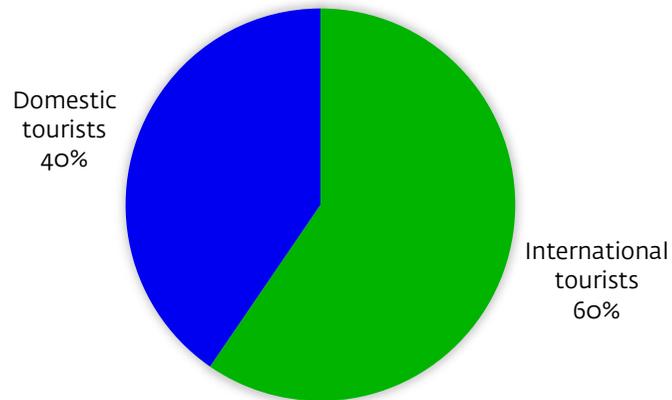
Source: Positium LBS

Accommodated tourists and overnight stays 2018

- According to Statistics Estonia, **1,715,008 tourists** stayed in accommodation **establishments in Tallinn** (-1% or -13,421 people)
Incl.:
 - international tourists: 1,462,726 (-2% or -30,818 people)
 - domestic tourists: 252,282 (+7% or +17,397 people)
- Tourists spent **3,149,626 nights** in Tallinn's accommodation establishments (+2% or +50,524 nights).
Incl.:
 - overnight stays by international tourists: 2,709,846 (+1% or +17,000 nights)
 - overnight stays by domestic tourists: 439,780 (+8% or +33,525 nights)
- This was a record year for Tallinn accommodation establishments in terms of the number of overnight stays.

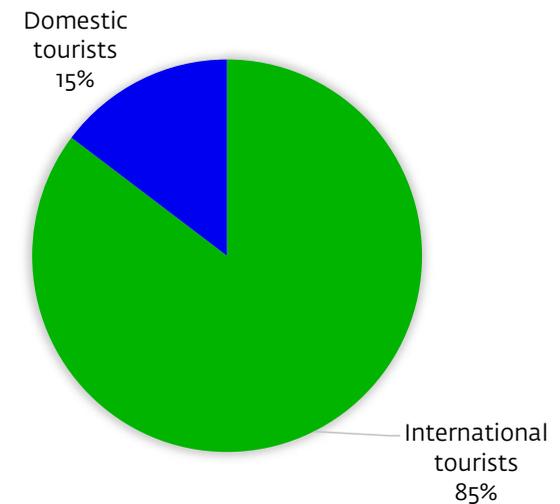
Share of Tallinn: accommodated tourists

Estonia
(tourists, N= 3 591 495)



Tallinn
(tourists, N= 1 715 008)

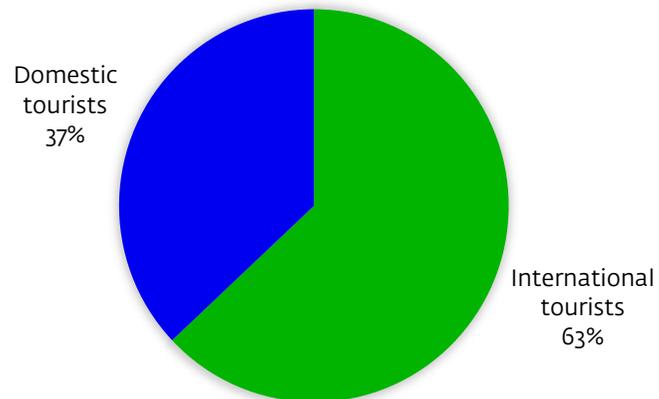
48%
→



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

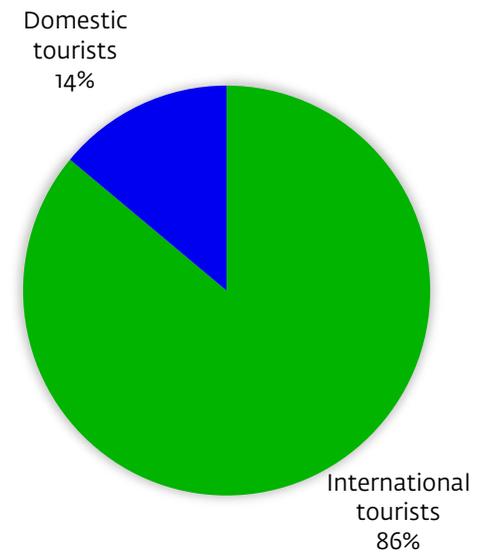
Share of Tallinn: Overnight Stays

Estonia
(bednights, N= 6 630 315)



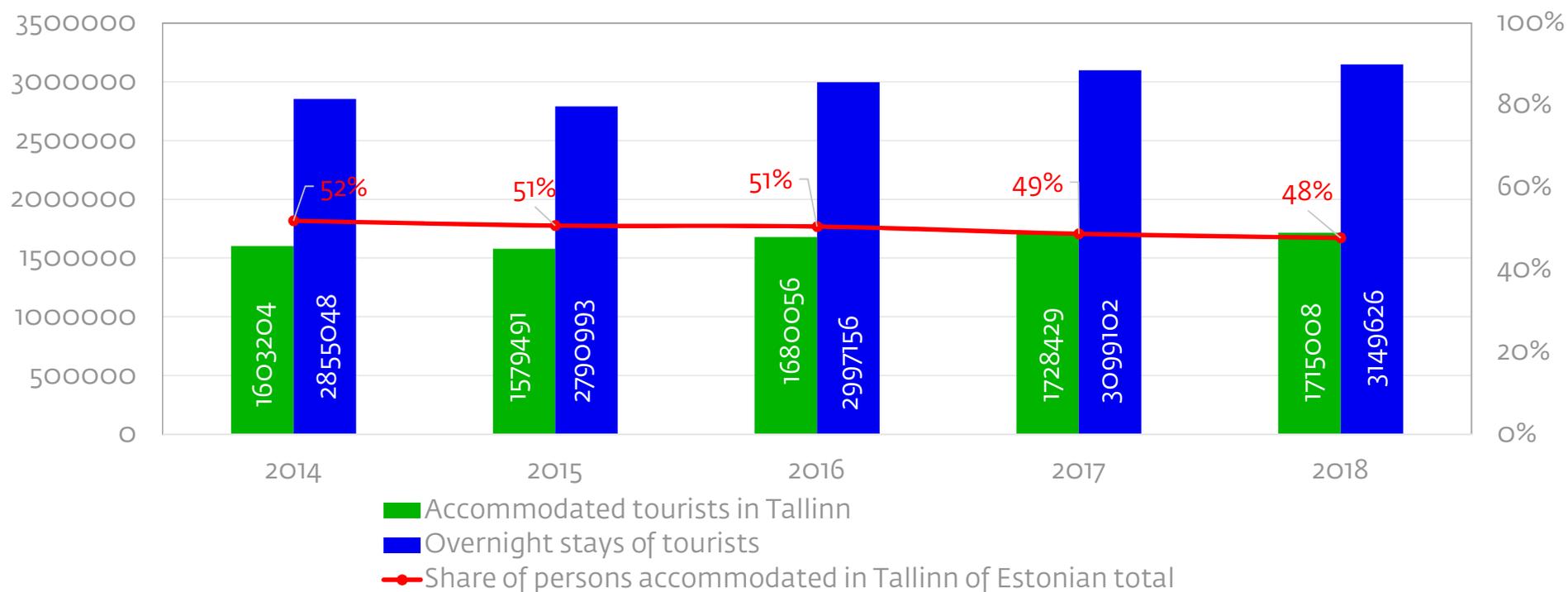
48%
→

Tallinn
(bednights, N= 3 149 626)



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Accommodated tourists and overnight stays in Tallinn 2014-2018



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Accommodated tourists in Tallinn 2014-2018



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Distribution of tourists to Tallinn by month

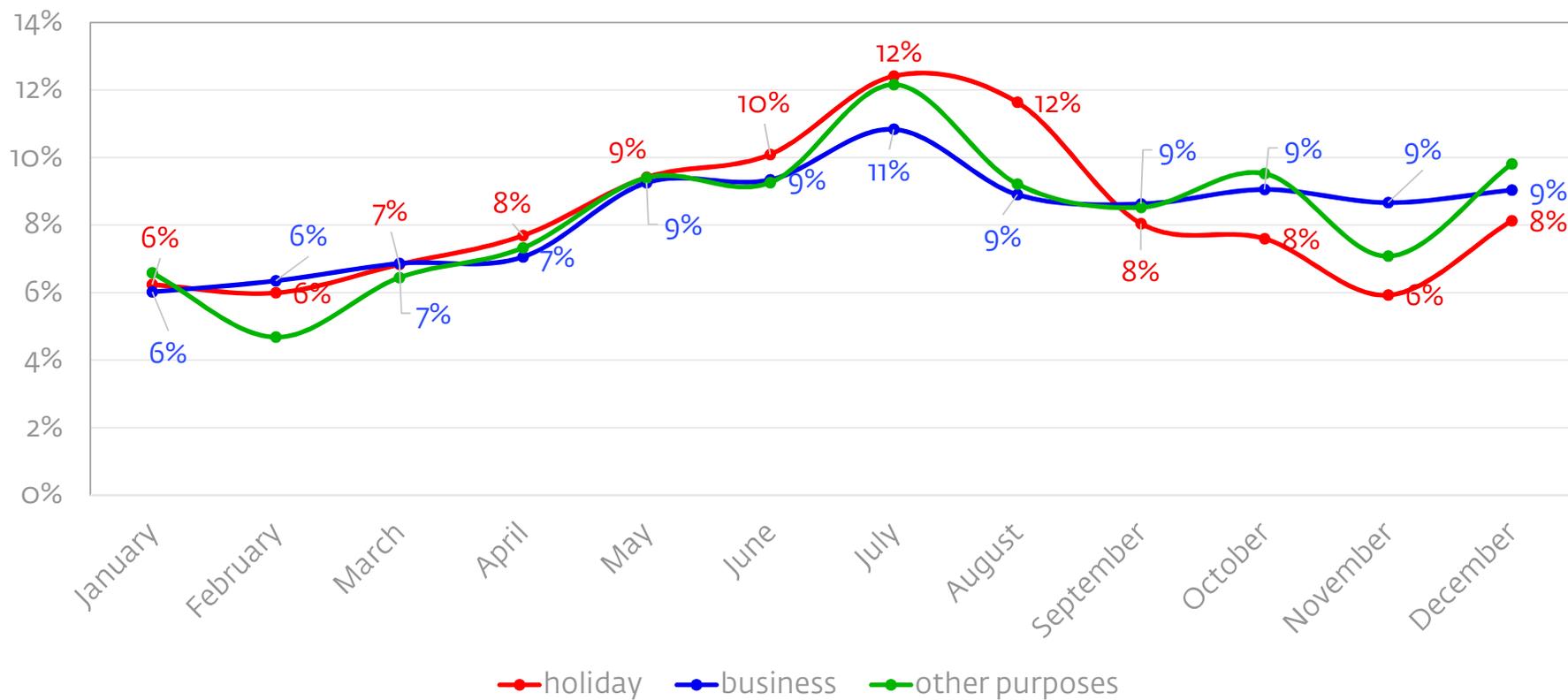


Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp
(Update 8.02.2019)

Tourism Trends in Tallinn in 2018

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Seasonality by purpose of travel 2018



Main foreign markets of Tallinn in 2018



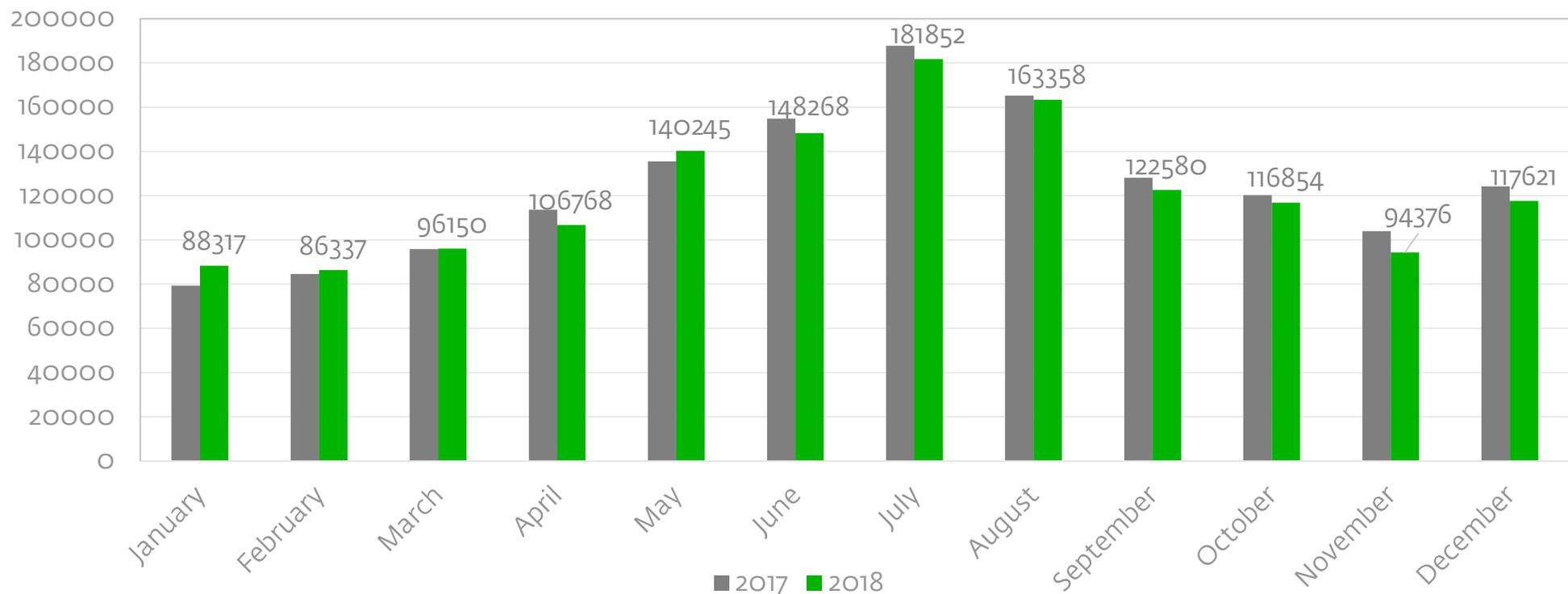
Country	Number	Change Number	Change %
Finland	578 246	-71 417	-11
Russia	140 203	1 982	+1
Germany	101 629	14 714	+17
Latvia	56 555	1 555	+3
United Kingdom	52 065	2 736	+6
Sweden	49 709	-2 701	-5
United States	40 899	7 325	+22
Lithuania	40 320	2 030	+5
Spain	35 146	3 125	+10
Italy	29 693	-74	0%
Other countries total	338 261	9 907	+3%

Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp
(Update 8.02.2019)

Tourism Trends in Tallinn in 2018

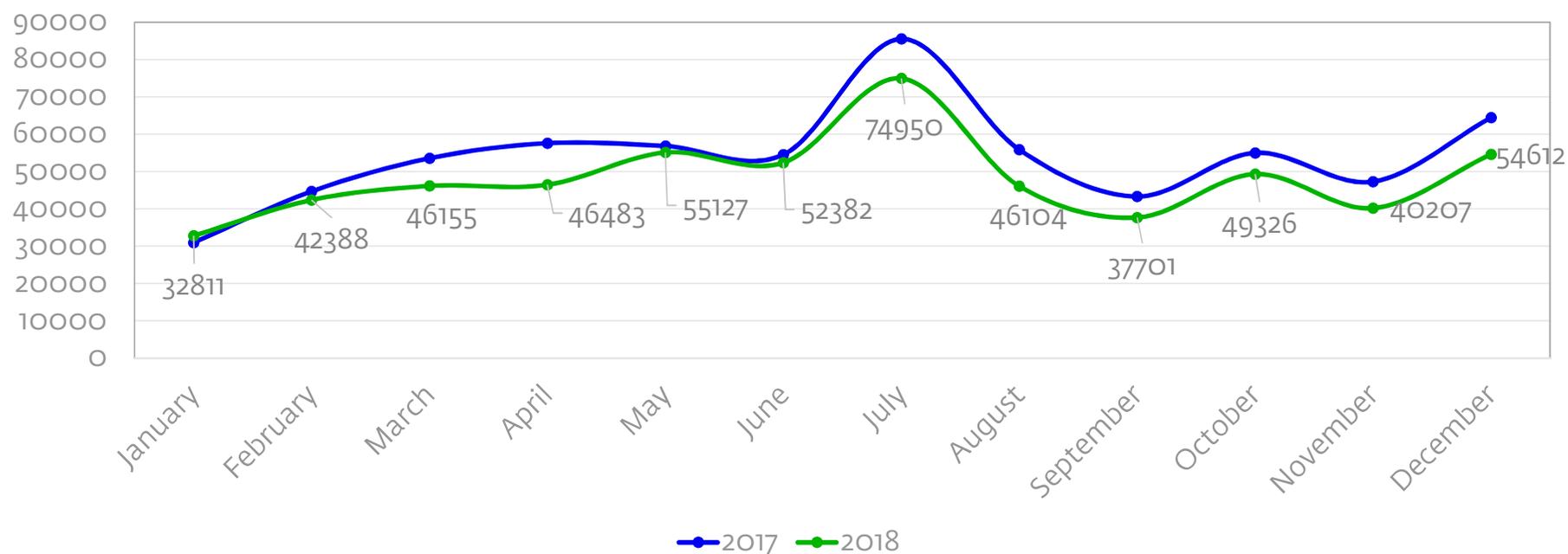
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Distribution of international tourists by month



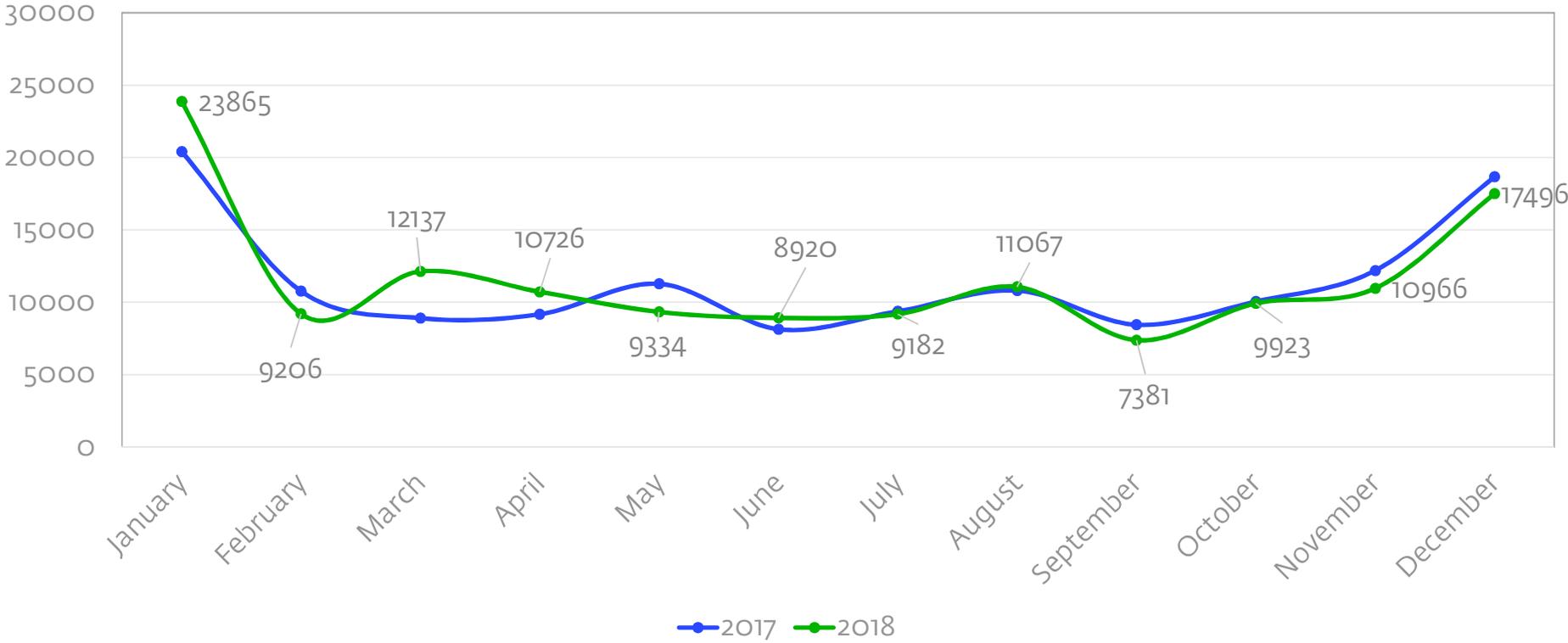
Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Visits of Finnish tourists to Tallinn by month



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

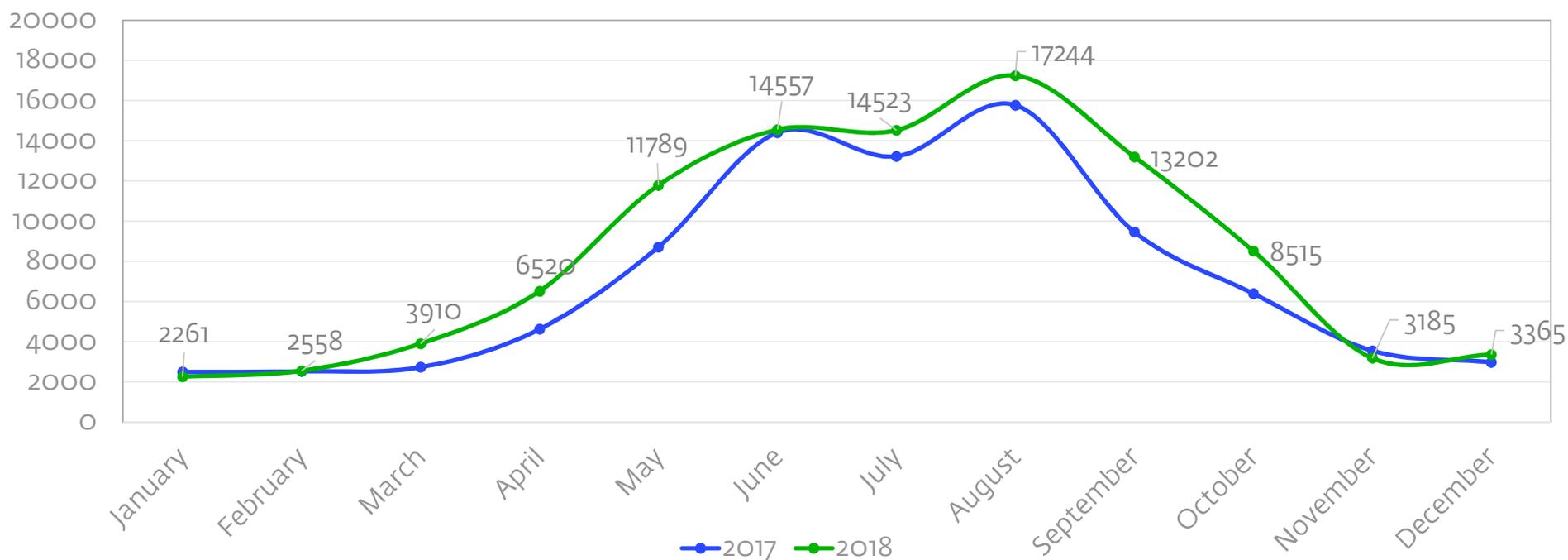
Visits of Russian tourists to Tallinn by month



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

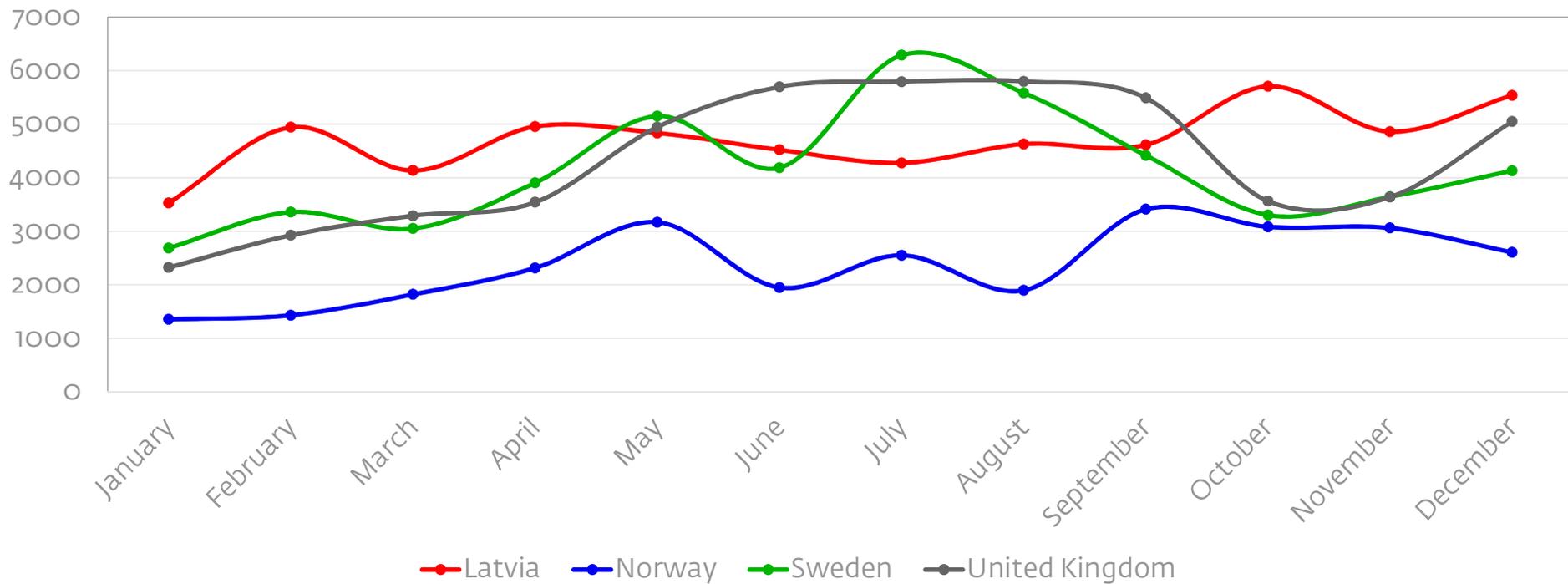


Visits of German tourists to Tallinn by month



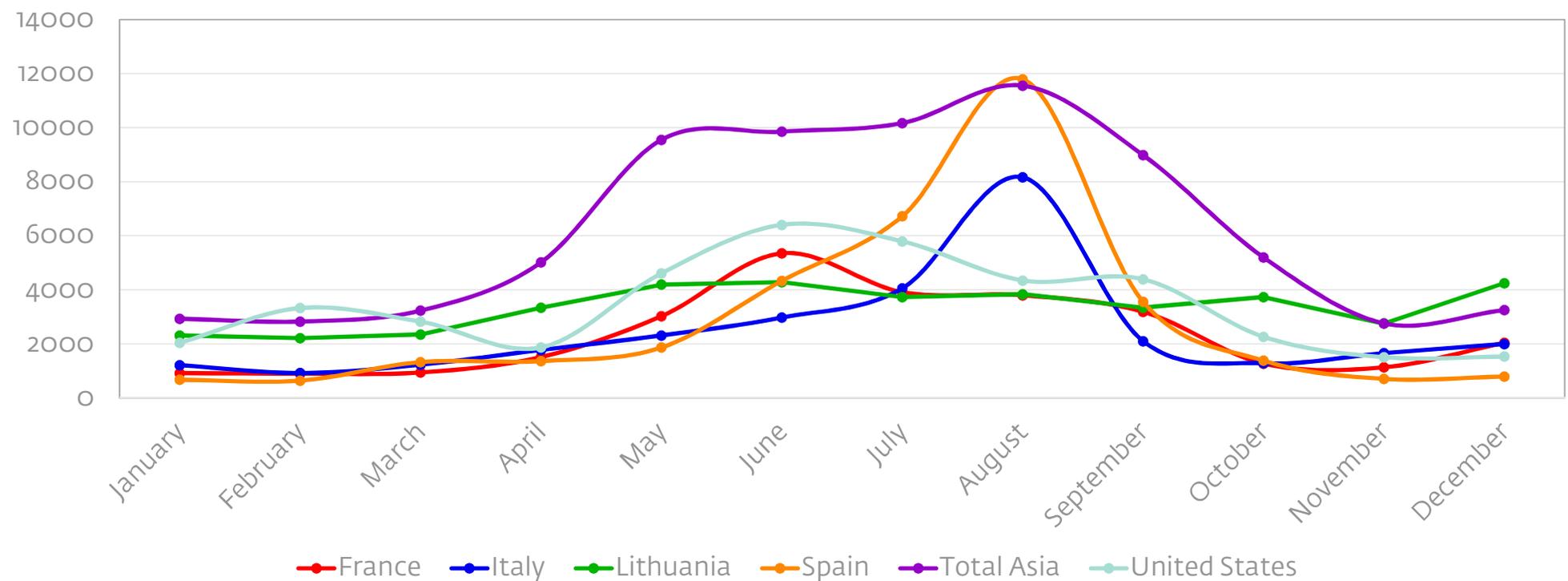
Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

International tourists of other main markets Tallinn by month



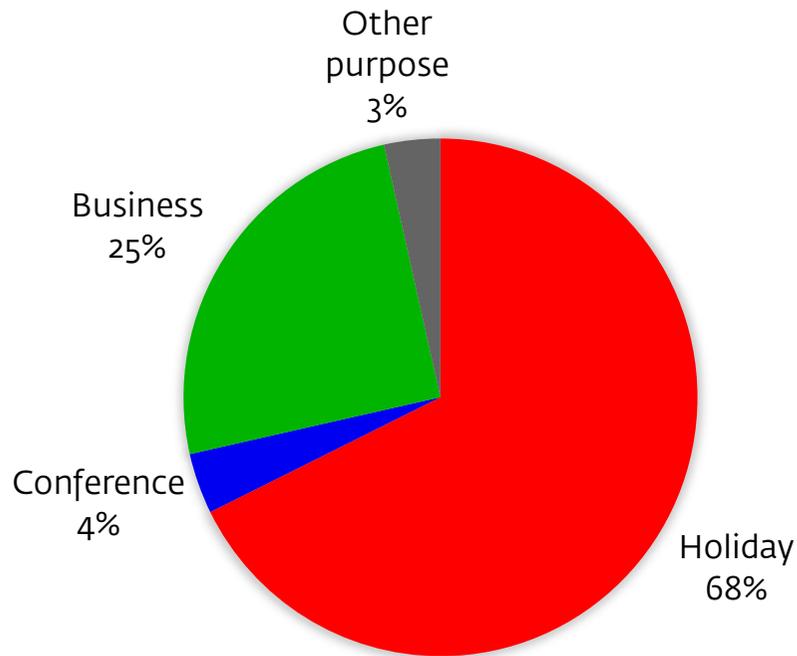
Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

International tourists from other significant target markets by month



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

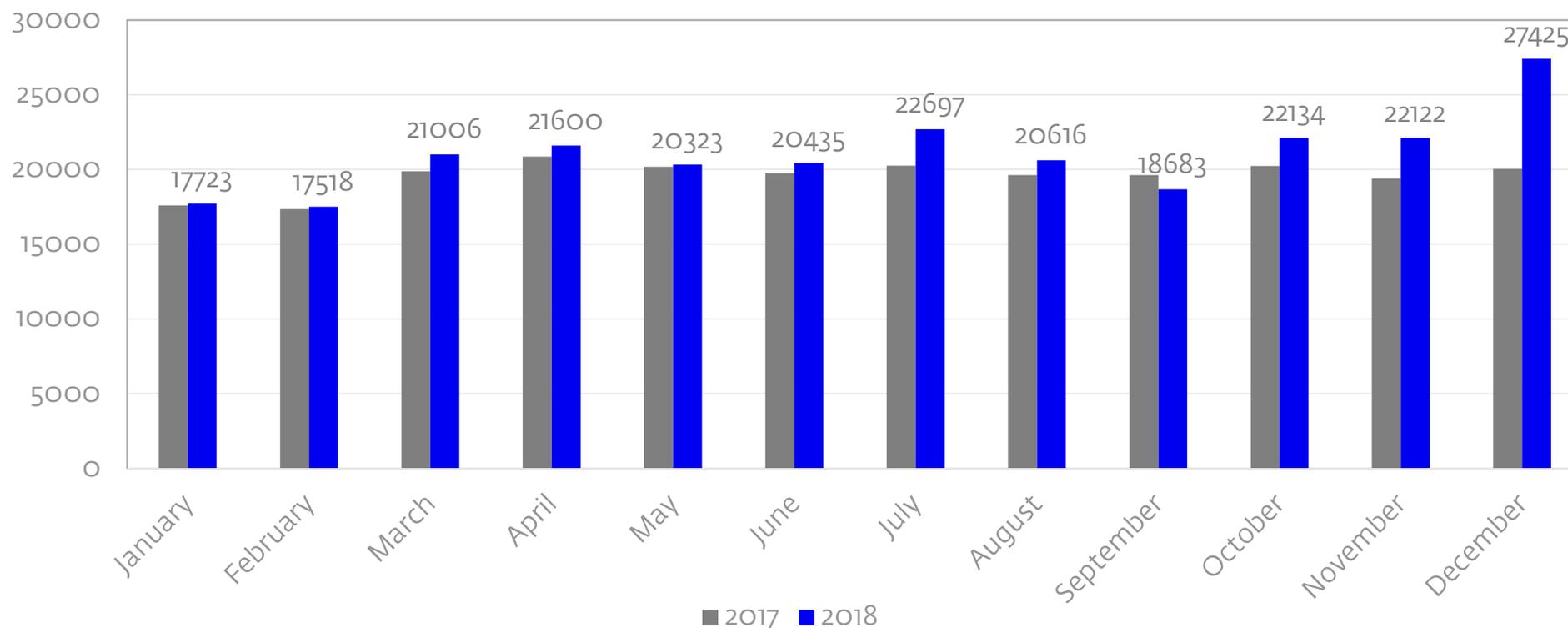
International tourists by purpose of travel (2018)



	Number	Change 2017/2018 (number)	Change 2017/2018 (%)	Share (%)
Holiday	990155	-66425	-6	68
Conference	55430	-16272	-23	4
Business	365518	50363	16	25
Other purpose	51623	1516	3	3
Total	1462726	-30818	-2	100

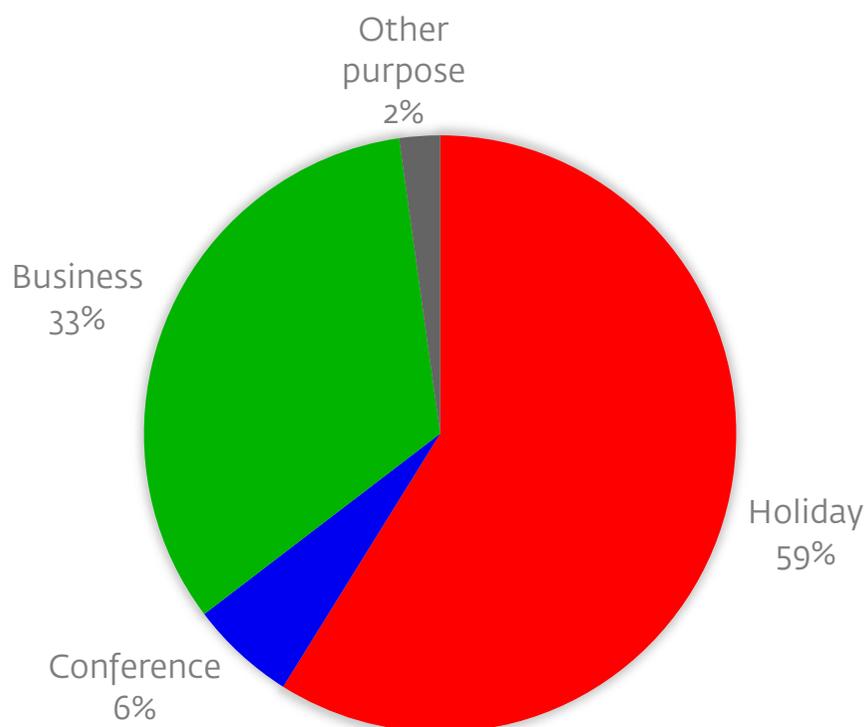
Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp
(Update 8.02.2019)

Distribution of domestic tourists by month



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Domestic tourists by purpose of travel 2018

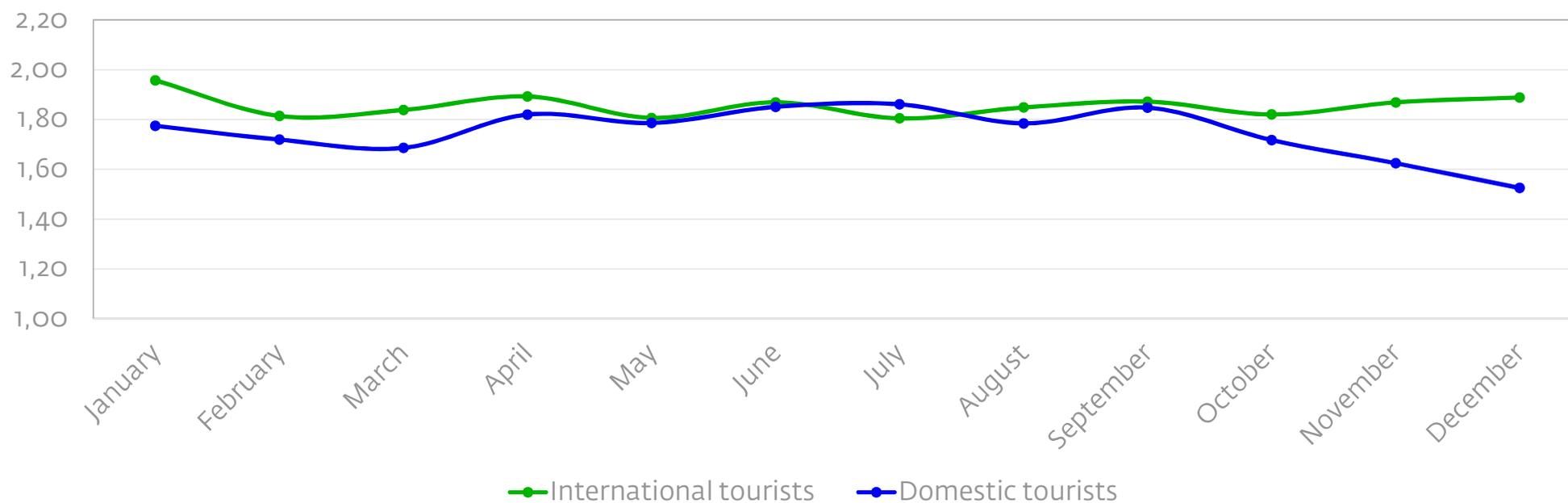


	Number	Change 2017/2018 (number)	Change 2017/2018 (%)	Share
Holiday	148566	7070	5	59
Conference	14591	448	3	6
Business	83511	8543	11	33
Other purpose	5614	1336	31	2
Total	252282	17397	7	100

Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

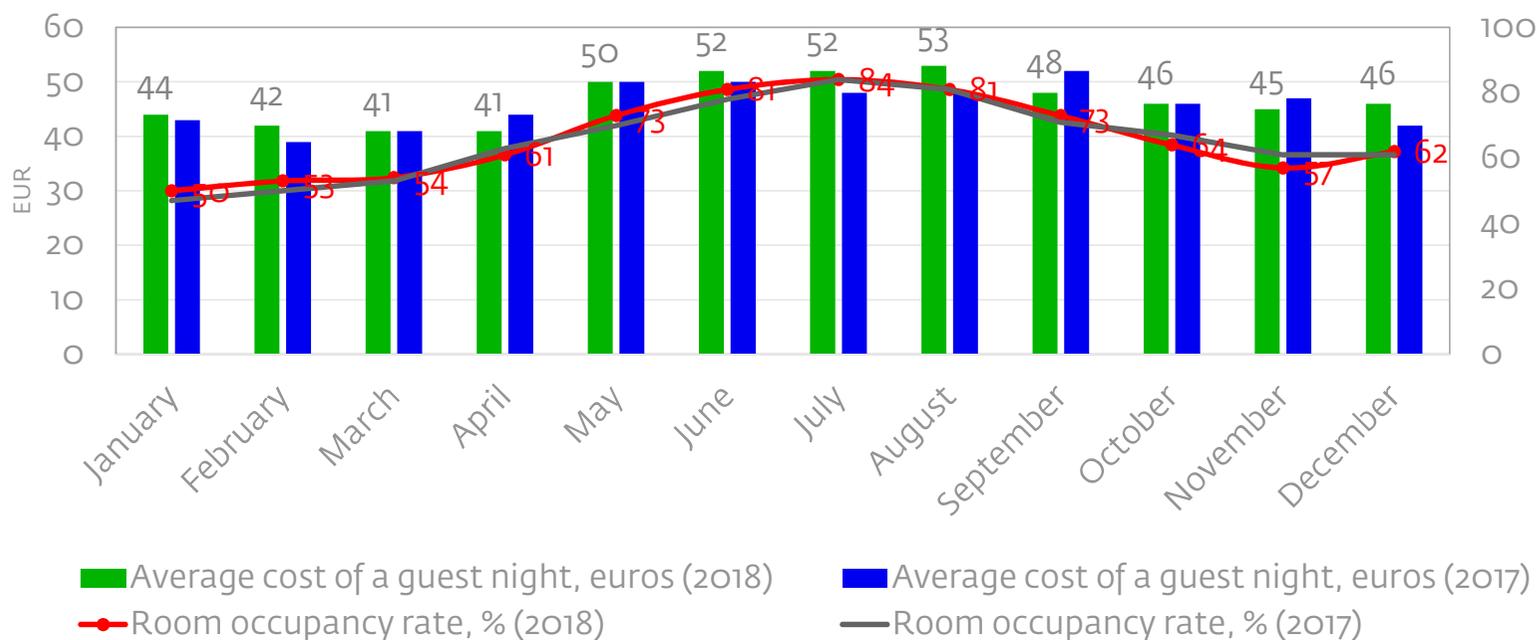
Average length of stay of tourists (nights)

The tourists average length of the trip was 1.84 nights
Domestic tourists spent an average of 1.74 nights
International tourists spent an average of 1.85 nights



Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Room occupancy rate in Tallinn's accommodation establishments and the average cost

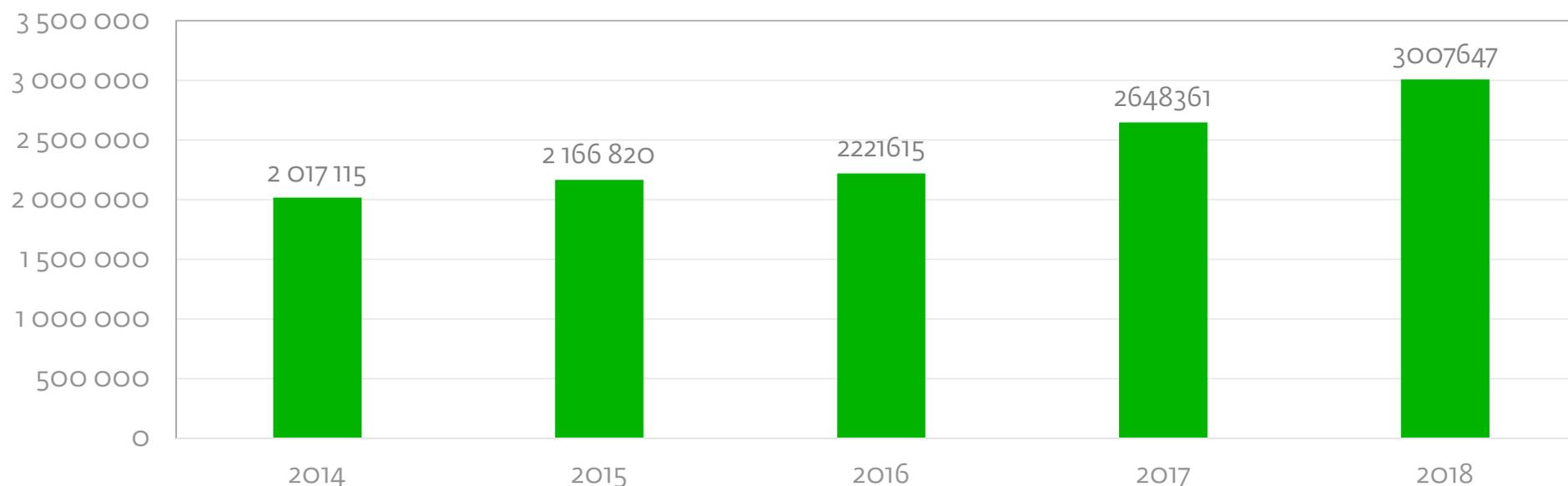


In Tallinn, the total number of accommodation establishments was 145. They had 7,700 available rooms and could accommodate 16,200 guests. The average occupancy rate of rooms in accommodation establishments was 66%. The average cost for 24 hours was 47 euros.

Source: Statistics Estonia, http://pub.stat.ee/px-web.2001/Database/Majandus/23Turism_ja_majutus/o2Majutus/o2Majutus.asp (Update 8.02.2019)

Passenger at Tallinn Airport

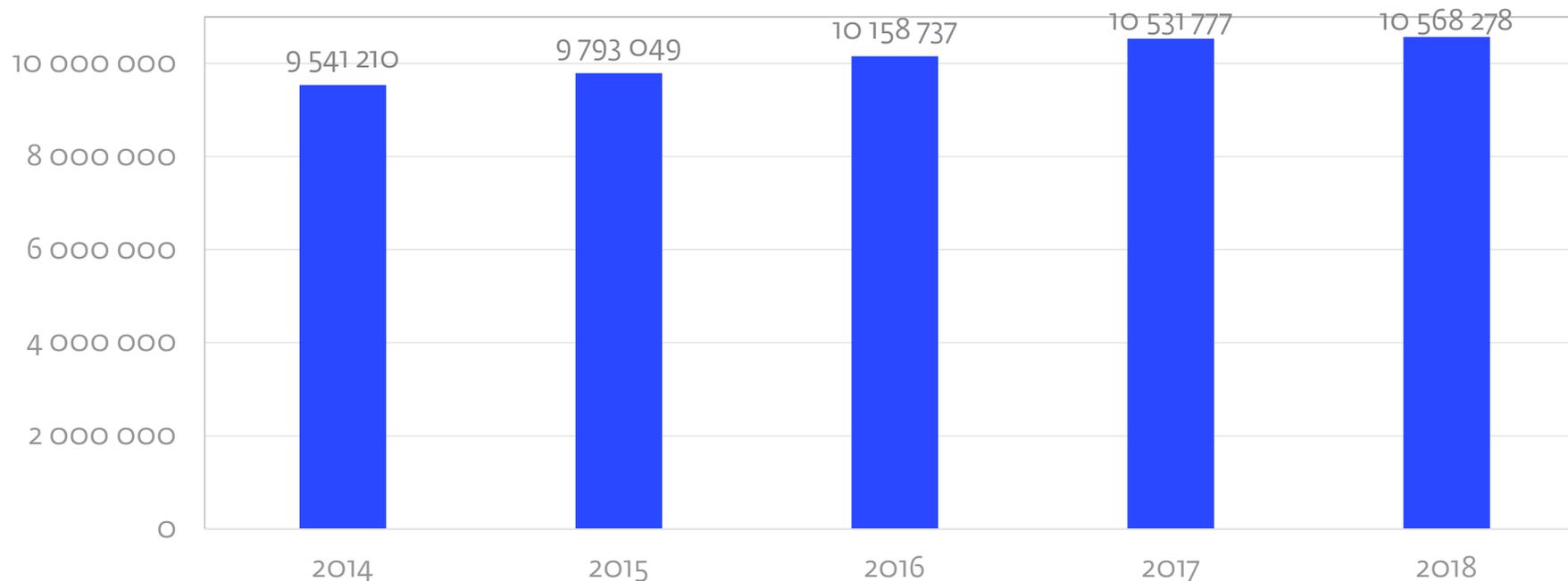
3 million passengers (+13%) in total were served at Tallinn Airport. Regular flights were made to 41 destinations. The largest number of passengers were served on Helsinki (10%), Frankfurt(11%), Riga (9%) and Stockholm (8%) flights.



Source: Tallinn Airport (2019)

Passengers in Tallinn Old City Harbour

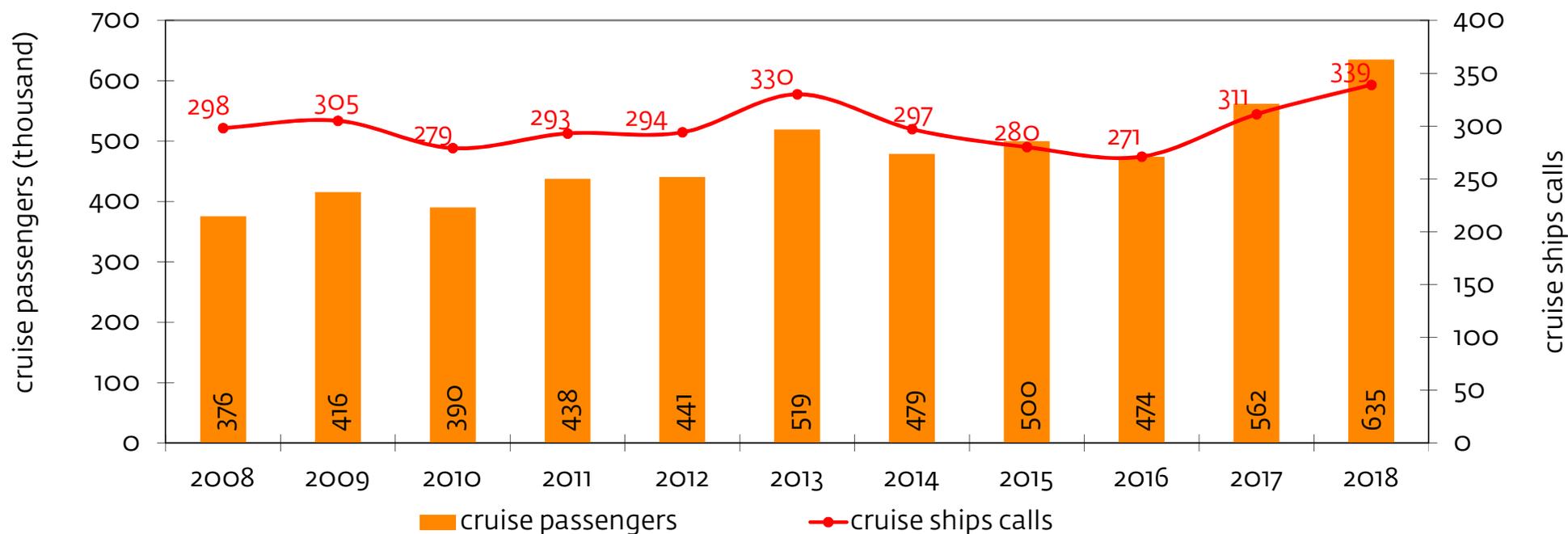
10,5 million passengers (0%) travelled through the Old City Harbour of Tallinn. 83% of them travelled on the Finland route, 10% on the Sweden Route, 1% on the Russia route and 6% were cruise passengers.



Source: Port of Tallinn (2019)

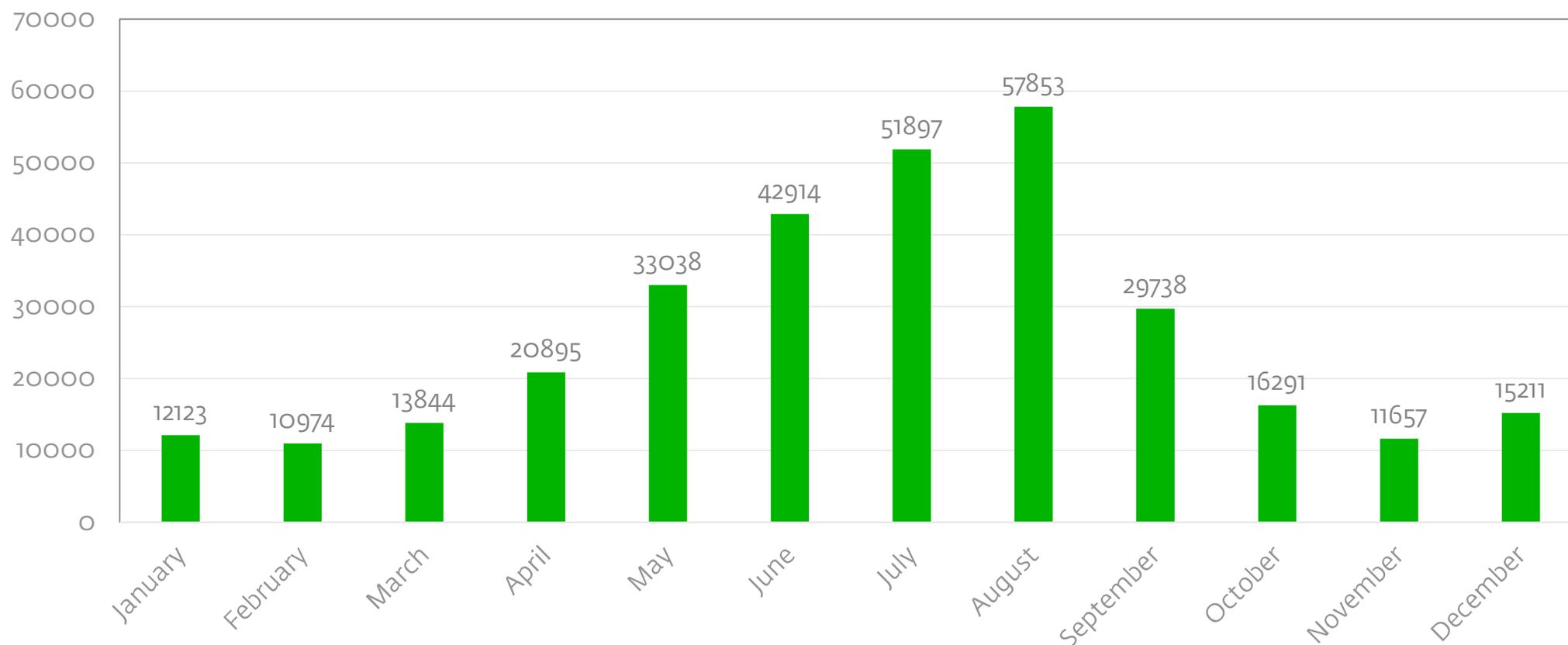
Cruise ships calls and passengers in Tallinn

Cruise ships made 339 visits to the Old City Harbour during the year and 635,000 cruise passengers went on a tour of the city.



Source: Port of Tallinn (2019) <http://ts.ee/statistika>

Visits to Tallinn Tourist Information Centre 2018

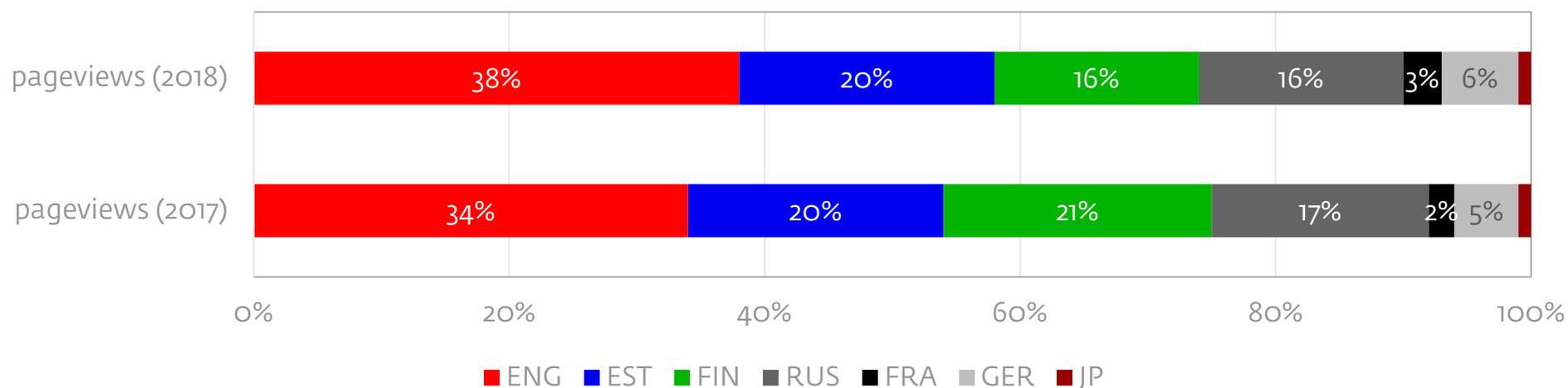


Visits to Tallinn tourism website

Tallinn tourism website visittallinn.ee received **6,50 million pageviews** (+16%).

On average, the duration of the visit was **02:51** minutes and **2,87** pages were viewed by session.

The most visits to the website were made while in Estonia (39% of all visits), followed by Finland (20%) and Russia (6%).



Source: Google Analytics

Conclusions

1. Approximately 4.6 million foreign residents visited Tallinn in 2018, which is a slight increase compared to the year before. 59% of visits to Tallinn by foreign tourists were one-day visits (approximately 2.7 million in total). 41% of foreign travellers (approximately 1.9 million in total) stayed in Tallinn for several days.
2. The estimated amount of money spent by foreign tourists on goods and services in Tallinn was 1.05 billion euros (+3%).
3. According to Statistics Estonia, 1.71 million tourists stayed in accommodation establishments of Tallinn. Of all tourists, 85% were foreign tourists. The three largest tourism markets for Tallinn are Finland, Russia, and Germany. 40% of all accommodated foreign tourists were from Finland (-11%), 10% from Russia (+1%), and 7% from Germany (+17%). Developments in other important markets were also divergent: the number of tourists from Latvia and the United Kingdom increased by 3% and 6%, respectively. 252,300 domestic tourists were accommodated, which is 7% more than last year. Tourists spent a total of 3.1 million (+2%) nights in accommodation establishments in Tallinn, of which overnight stays by foreign tourists accounted for 86%. The number of overnight stays by foreign tourists has shown a 1% increase and the number of overnight stays by domestic tourists an 8% increase.

Conclusions

4. Tallinn continues to be valued as a holiday destination. 66% of the tourists who stayed in an accommodation establishments came to Tallinn for a holiday, 31% for business (of whom 4% were on a conference trip), and 3% visited the city for other purposes. The number of holiday trips decreased by 5%, the number of business trips increased by 9%, and the number of city visits for other purposes increased by 5%.
5. 68% of tourists visit the city from April to October. The high-month of tourism in Tallinn is July. The average trip length for travellers who stayed in an accommodation establishment in Tallinn was 1.84 nights (+2%). On average, domestic tourists spent 1.74 nights and foreign tourists 1.85 nights in accommodation establishments in Tallinn.
6. More than 300,000 people paid a visit to the Tourist Information Centre in 2018. Tallinn tourism website visittallinn.ee received 6,5 million pageviews in 2018, which is 16% more than the year before. On average, the duration of the visit was 2:51 minutes and 2.87 pages were viewed by session.



<https://www.visittallinn.ee/eng/travel-trade-media/statistics-surveys>

