



The Tallinn Guide Association was founded in 1992 and in 2017 celebrated its 25th anniversary.

We are not a national association, and not part of the national umbrella organisation.

The association currently has 175 members offering tours in 21 languages, and about 75 of them actively attend events. The current board has 7 members. International Tourist Guide Day, February 21st is marked with an evening event for the association members and by offering free tours to the general public.

We have good cooperation with the Tallinn City Tourism Office and the Estonian Travel and Tourism Association (umbrella organisation of tourism industry employers) and together we form the Tallinn Tourist Guide Authorisation Committee, the body in charge of licensing guides in the city of Tallinn.

Estonia is not a regulated country, anyone can be a guide. Tourism in Estonia is regulated by the Ministry of Economic Affairs and Communications, who are not in favour of any regulation and always stress the free movement of labour etc.

The Tallinn guiding licence has to be renewed every three years, with proof of at least 10 tours a year and 10 units of training.

We are also partners with the Port of Tallinn, which is the main gateway to Tallinn and receives 10 million passengers annually, and with the airport, which has a turnover of 2.5 million passengers. We also partner with the main cruise tour operators and have annual meetings with the three main companies who offer tours to cruise ships.

We always stress the importance of hiring only licensed guides. There are 231 licensed guides listed on the Tallinn city website offering tours in 25 languages.

We also partner with the main museums, as most require a separate guiding licence. Museums offer basic training for a fee, and there is usually an examination. The renewal of the licence is every 3-5 years.

The year 2018 was busy, as Tallinn was voted the 2018 Best Value Destination by Lonely Planet. In 2018 Estonia celebrated its centenary and a wide spectrum of events took place throughout the country to celebrate 100 years of the Republic of Estonia.

2019 has been a regular year, tourism still remains seasonal. Most of the visitors arrive between May and October. The Tallinn Christmas Market was voted Best Christmas Market in Europe in 2018, this fact should also attract visitors in the low season.

There has been a slight change in the tourist market, with fewer arrivals from Finland and Russia, and growth in the German and Danish markets. The remarkable growth of the Danish market with over 100% happened because in June 2019 Tallinn marked the 800th anniversary of the foundation of the city and Tallinn is regarded as having been founded by the Danes.

The Estonian Travel and Tourism Association organises Tourest, the international travel trade fair annually in February. At the 2019 fair the Tallinn Guide Association presented two seminars, "What do tourists really want?" and "How to become a guide". We have also been asked to present in 2020.

Tallinn still remains a popular cruise ship destination on the Baltic Sea.

In 2019 there were 340 cruise ship calls with 600 000 passengers. However, when 4 or 5 large ships are in port the Old Town becomes very overcrowded, causing traffic issues and congestion. The main comment from the guests is that they never expected Tallinn to be so busy.

Such comments prompted the association to set up a Cruise Cluster, uniting the Port of Tallinn, agencies servicing cruise ships, the municipality and our association. Two meetings were held at the office of the Tallinn vice mayor responsible for tourism.

Tourism in Tallinn 2018 saw 4.64 million visitors in the year, which was an increase of 5%. There were 1.93 million overnight stays and three million day trips. Guests mainly arrive from Finland, Russia, Germany, Latvia, Sweden, and the USA. Numbers for 2019 are expected to be the same.

"Free tours" still continue to be popular and are number one on the list of things to do in Tallinn on *Tripadvisor* even though none of the guides are licensed, and we are monitoring the situation. Slightly unfortunately the meeting point is in front of the Tourist Information Centre and when someone walks in and says that they would like to go on a guided tour, the staff recommend taking the free tour instead of contacting a licensed guide.

Prospects for 2020: the municipality of Tallinn is seriously considering introducing a city tourism tax.

Tallinn
November, 2019