

Tourism in Tallinn 2010

In 2010 2.40 million tourists stayed in Estonian accommodation establishments, and over half of them (54%) spent the night in Tallinn.

Tourists in Tallinn: 1 289 400 (+14%)¹
Bednights in Tallinn: 2 291 500 (+19%)

Total foreign tourists: 1 141 700 (+14%)
Bednights of foreign tourists: 2 055 800 (+20%)

Total domestic tourists: 147 700 (+9%)
Bednights of domestic tourists: 235 700 (+10%)

Numbers of bednights by Finnish and Russian tourists grew the most

Finland: 935 800 nights (+23%)
Russia: 217 200 nights (+48%)
Germany: 118 200 nights (+15%)
Sweden: 98 500 nights (+3%)
Norway: 83 400 nights (-4%)
Great Britain: 72 500 nights (+4%)
Latvia: 56 100 nights (+9%)
Italy: 47 600 nights (+19%)
USA: 38 900 nights (+20%)
France: 37 800 nights (+28%)
Spain: 33 600 nights (+22%)
Belgium: 11 900 nights (-2%)
Japan: 11 900 nights (+1%)
China: 4 600 nights (+24%)

Increase in length of stay

The average length of stay of tourists in Tallinn was 1.78 nights (+5%).

Stays by foreign tourists: 1.80 nights (+5%)
 Domestic tourists: 1.60 nights (+2%).

The majority of tourists came to Tallinn for a vacation

Of all **foreign tourists'** bednights in Tallinn, 76% were for leisure purposes, 20% business, 3% conference attendance and 1% for other purposes.

Domestic tourists spent 57% of their bednights for leisure purposes, 35% for business, 5% conference attendance and 3% for other purposes.

Room occupancy rates in accommodation establishments increased and the price of guest nights decreased

363 accommodation establishments were registered in Tallinn at the end of 2010, with 7 607 rooms and 15 378 beds. **Average room occupancy was 52%**, amounting to 8 percentage points higher than the previous year.

Tallinn's accommodation establishments earned 70,9 million Euros from sales of accommodation services. A guest night in Tallinn's accommodation establishments cost an average of 31 Euros, a decrease of nearly a tenth (-8%).

Numbers of air passengers and travellers by sea increased

1.38 million passengers (+3%) came through **Tallinn Airport** in 2010. Regular flights to 34 different destinations took place, with most serviced lines being Helsinki, Riga and Copenhagen.

Passengers in **Tallinn Old City Harbour** totalled **7.88 million (+9%)**, of whom 84% travelled on the Tallinn-Helsinki line, 11% on the Tallinn-Stockholm line and 5% being cruise passengers.

280 cruise ships and **391 000 cruise passengers** visited Tallinn in 2010. 19% of cruise passengers were from Germany, 18% from the USA, 16% were from Great Britain and 11% from Spain.

Decrease in visits to Tallinn Tourist Information Centres

Tallinn Tourist Information Centres served **161 000 visitors (-15%)**. Foreign visitors originated mostly from Finland (37 000), Russia (20 500) and Germany (15 000).

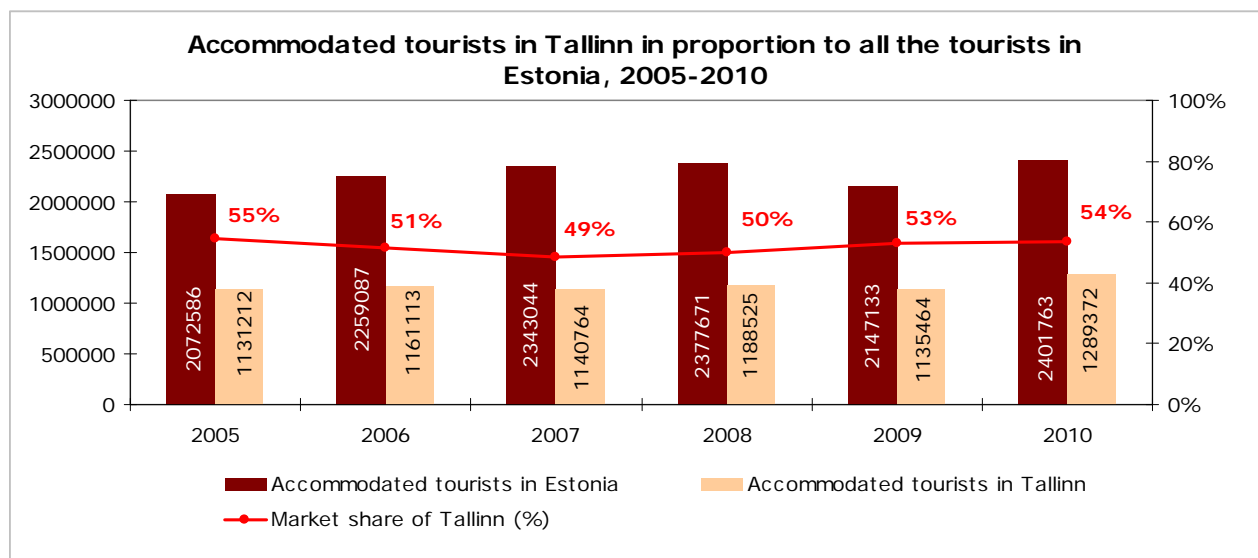
¹ Comparison with 2009 data

Tourists staying in Tallinn's accommodation establishments

In 2010, a total of 2,40 million tourists (+12%) spent the night in Estonian accommodation establishments. 65% of them, or 1.56 million, were residents of foreign countries (+13%), who stayed for a total of 3.20 million bednights (+17%). 837 800 domestic tourists (+9%) stayed in Estonian accommodation establishments for a total of 1.49 million bednights (+8%). For Estonian accommodation establishments this is an all time record year of tourists as well as bednights.

Half (54%, in total 1.19 million) of the tourists staying in accommodation establishments in the country spent the night in Tallinn. **A total of 1 141 700 (+14%) foreign tourists and 147 000 Estonian residents (+9%) stayed in Tallinn's accommodation establishments in 2010.** The number of people (both foreign and domestic) staying in accommodation establishments increased by 14%, or 153 900 tourists, in comparison with 2009.

With the past 3 years Tallinn's share in Estonia's tourism has grown; in 2010 54% of the accommodated tourists in Estonia stayed in Tallinn. The growth in number of tourists and bednights in Tallinn has been faster than on average in Estonia.



Source: Statistics Estonia

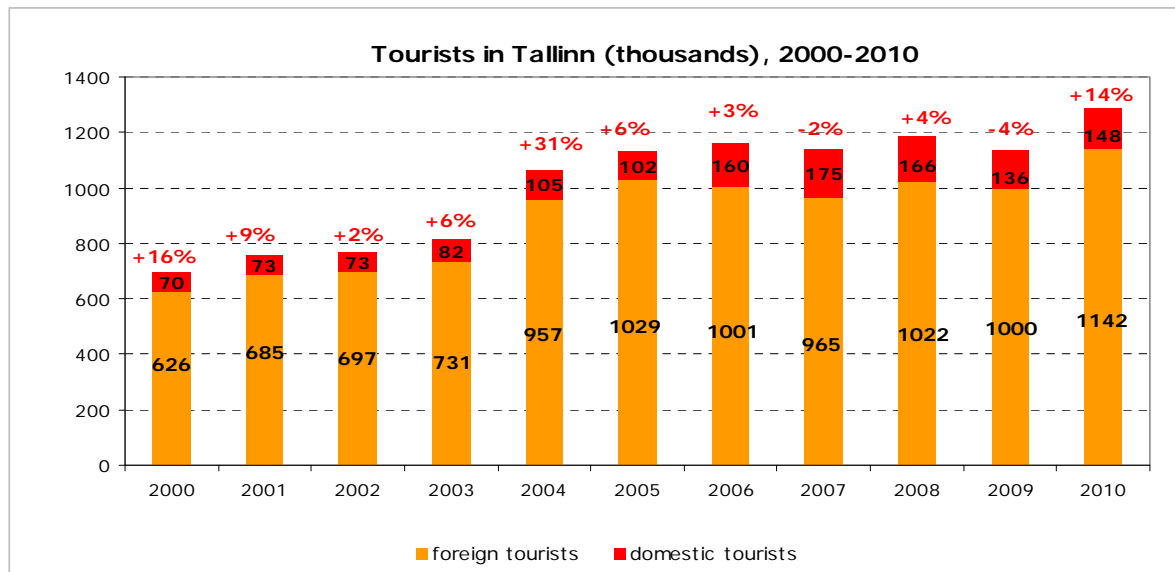
The year 2010 started with the record growth of 20% of foreign tourists. In addition to New Year's celebrations and Orthodox Christmases the European Ice Skating Championships brought in foreign tourists. This event brought an estimated increase of seven to ten thousand tourists. The number of tourists grew also in February (+9%) and March (+22%), but the percentage of growth stayed more or less on the same level as the percentage decrease in 2009. Those first months showed a positive trend as the slowdown in domestic tourism dropped.

The second quarter results were also positive although the growth percentages were smaller compared to the first three months of the year. Accommodated foreign tourists number grew in April by 16%, in May by 13% and in June by 17%. Domestic tourists numbers grew significantly in April (+28%) and in May (18%), but decreased again in June (-5%).

The increase in the number of tourists in the first half of the year was supported by discounted packaged tours and events taking place in Tallinn (European Ice Skating Championships, concerts by Metallica and Rod Stewart, Old Town Days etc.). Growth in domestic tourism numbers was prompted by increases in business trips by Estonians.

During the summer visitors numbers grew by a tenth (+11%); including increase of foreign tourists by 12%, domestic tourists number remained unchanged (-1%). The last quarter of the year brought a 15% increase in tourists overall; including a 13% increase in foreign tourists and a 23% increase in domestic tourists.

Events influencing the number of visitors in the second half of the year were II CSIT World Games, music festivals in August, a concert by Sting and SEB Tallinn's autumn run and marathon, Finnish season festivities *pikkujoulud*, European Film Academy Awards Ceremony and New Year's celebrations. Domestic tourism demand stabilised in the second half of the year. Domestic tourists business trips grew from September onwards and during the last three months so did the leisure trips.



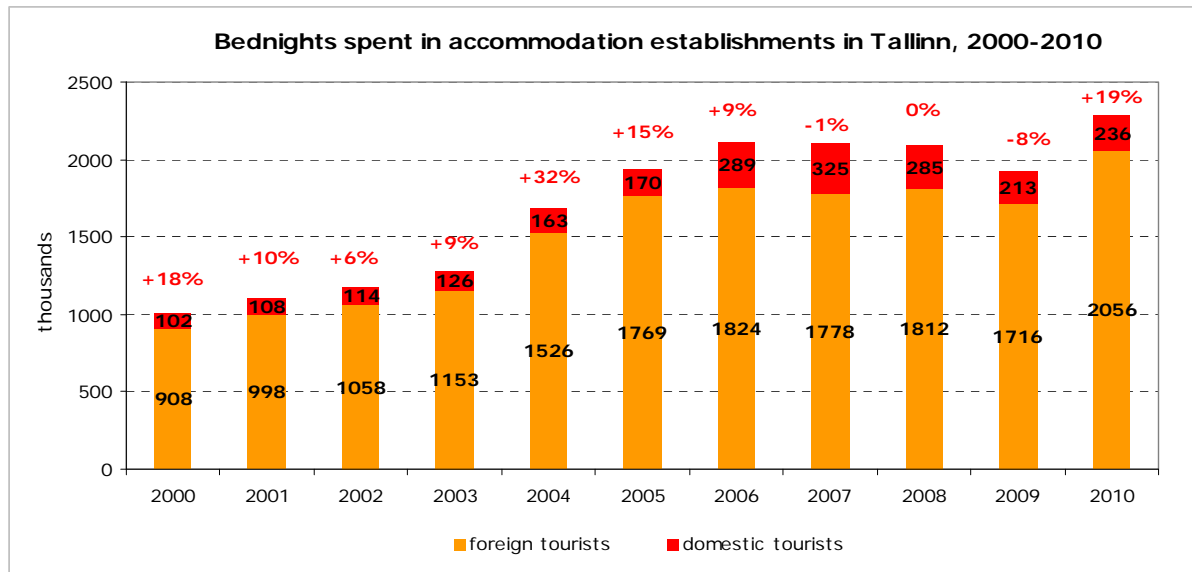
Source: Statistics Estonia

Bednights spent by tourists grew by nearly a fifth compared to the previous year. A total of **2.29 million bednights (+19%)** were spent in Tallinn's accommodation establishments. While the **percentage growth in bednights by foreign tourists was relatively big** (+20%, totalling 2 055 800 nights), bednights spent in Tallinn by **Estonian residents grew by a full quarter** (+10%, totalling 235 700 nights).

Analysis of changes in bednights by month shows that numbers of bednights spent by tourists increased throughout the year compared to the previous year. The growth was faster in the first half of the year.

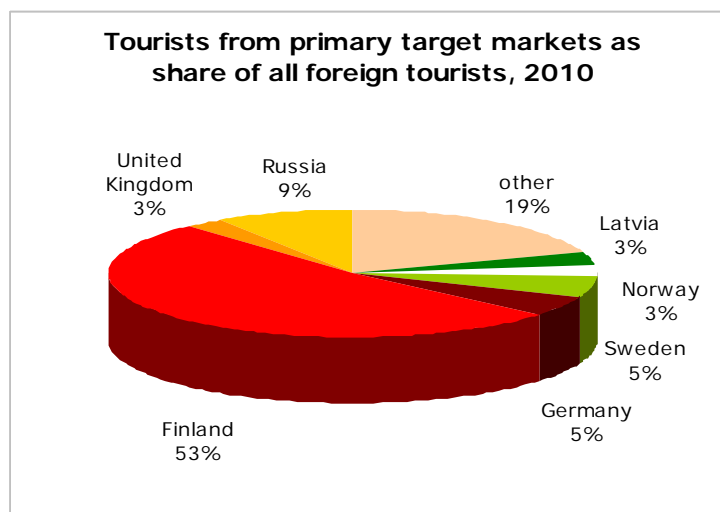
Bednights by domestic tourists fell in January (-14%) and during the summer months (in June -10%, July -10% and August -17%). In other months the bednights of Estonian citizens grew, mostly in September (+48%). The increase of domestic tourists number is due to the increase in business trips although in the second half of the year also leisure trips were on the increase.

90% of all the bednights in Tallinn were made by foreign tourists. Bednights of foreign tourists grew throughout the year. The growth in numbers is mainly due to the prolonged trips of Finnish and Russian citizens (accordingly 173 700 and 70 300 bednights more than in 2009). The fastest increase in number of bednights was in March (+35%), January (+26%) and November (+26%). During the other months the bednights number grew by 15 to 20%. The growth numbers in March can be justified by previous year's considerable drop. Increase in January and November is related to Russian tourists' leisure trips.



Source: Statistics Estonia

Tourists from **Tallinn's primary target markets** (Finland, Sweden, Germany, Great Britain, Norway, Russia and Latvia) made up 81% of all foreign tourists in 2010. There were no significant changes in the primary markets' share numbers. Compared with the previous year, the Russian market share grew by two percentage points, the Finnish and Swedish market shares decreased by one percentage point. German, Great Britain's, Latvian and Norwegian market shares remained unchanged. The share of other foreign countries also remained on the same level compared to the previous year.



Russia: +47% (+33 200)

Germany: +17% (+8 200)

Finland: +11% (+61 000)

Latvia: +8% (+2 700)

Great Britain: +7% (+2 000)

Sweden: +2% (+1 400)

Norway: 0% (-100)

Primary markets 81%

Source: Statistics Estonia

More than half of the foreign tourists staying in accommodation establishments arrived from **Finland** (53%). Compared to 2009, the number of Finnish tourists grew by 11% or 61 000 tourists bringing the total to 595 600 tourists. Therefore 43% of the foreign tourists numbers and 51% of the foreign tourists' bednights was made up by the Finnish market.

Accommodated Finnish tourists numbers grew throughout the year more than estimated. Most of Finnish tourists arrived during the summer months. There was less interest in trips to Tallinn in January and February. During the other months the number of Finnish tourists depended on the events in Tallinn and discounted offers by accommodation

establishments or ferry companies.

Analysing market behaviour, we see that both the numbers of Finnish tourists in accommodation establishments and the numbers of their bednights grew compared to the previous year most in March (+25%) and April (+22%), precisely the months when several cultural events took place in Tallinn.

Compared to the previous year, in 2010 Finnish tourists' trips were longer. Most likely the Nordic neighbours found more suitable passing time opportunities in Tallinn than before. The surveys also prove that year by year the number of repeat visitors increases especially among the people taking part in cultural events. According to a survey in 2005 by research company Position, the Birgitta Festival visitors came back to the same event in following years.

2010 was again a record year for the Russian market. **Russia** rose to become the second market in terms of size, and compared to the previous year, the Russian market share rose by two percentage points. Russian tourists made up 9% of all the foreign tourists staying in accommodation establishments. 103 200 Russian tourists stayed in Tallinn's accommodation establishments in total with 217 200 bednights. Tourists numbers from Russia increased significantly already in 2008 influenced by the visa regulations simplifications². The growth in Russian tourist numbers continued in 2009 by more than a tenth (+13%) when foreign visitors from most countries decreased. This trend mirrored the growing interest by Russian tourists. Russian tourists numbers continued to grow in 2010 as well and the growth in percentage were significantly bigger than the previous year (+47%). Higher growth percentage were in February (+109%) and November (+127%), also during the other months tourist numbers grew by more than a fifth. Most tourists from Russia arrived in January and December.

As a positive trend, the Russian tourist numbers kept growing during the summer months. The Marketing campaign "*Сказка совсем рядом*", promoting Tallinn as an attractive, nearby, short-break destination helped raise interest among Russian tourists. The winter campaign centred around New Year's festivities, spa holidays and cultural experiences.

Tallinn's third primary market, **Sweden** (market share 5%), saw an increase in trips with accommodation by Swedish citizens although the growth percentages were smaller than the drop percentages in 2009. Altogether, 59 200 Swedish residents stayed in Tallinn's accommodation establishments, increase of 2% or by 1 400 tourists. Same trend followed the bednights by Swedish citizens. In total the Swedish residents spent 98 400 bednights in Tallinn, an increase of 2 700 bednights or +3% compared to previous years. Observing the changes in visitor number month by month, there were fewer tourists in January, May and October, but the rest of the months showed increase in numbers compared to 2009 (by month increase of 2% to 15%). In April spring campaign "*SPAktakulära semester inTallinn*" was launched to slow down the Swedish market decrease and increase the Swedish residents' trips during the summer months. Target group of the campaign were 30 to 55 year old residents of Stockholm or nearby areas, travelling with a partner, friends or family in order to have a short city break, relaxing holiday or wellness trip. Evaluating the annual summary it can be seen that the campaign goals were met.

German tourists also comprised 5% of foreign tourists arriving in Tallinn and compared to the previous year, their share remained unchanged. Altogether, a total of 57 800 Germans visited Tallinn, spending a total of 118 200 nights. Compared to the previous year, German tourist numbers rose by 17% and bednights by 15%. German tourists

² Russian citizens do not need Estonian visa after Estonia joined Schengen visa zone. It is sufficient to have visa of any Schengen visa zone country.

prefer to visit in the summer period (May-September). The greatest numbers of visitors in 2010 were in July (totalling 11 100 tourists), but the biggest growth in visitor numbers was in December (101%) when the European Film Academy Award Ceremony took place. The number of regular flights between Tallinn and big cities in Germany affected the development of the German market. In 2010 German tourists made more trips to Tallinn, but they were shorter.

Country of origin	Number accommodated	Change 2009/2010		Bednights	Change 2009/2010		Length of stay
		Number	%		Number	%	
Finland	595 553	60 968	11.4	935 818	173 719	22.8	1.57
Russia	103 151	33172	47.4	217186	70 289	47.8	2.11
Sweden	59 247	1 389	2.4	98 450	2 732	2.9	1.66
Germany	57 827	8 219	16.6	118 200	15 461	15.0	2.04
Latvia	37 714	2 734	7.8	56 117	4 713	9.2	1.49
Norway	34 758	-121	-0.3	83 349	-3 963	-4.5	2.40
Great Britain	31 290	1 956	6.7	72 458	2 769	4.0	2.32
Total of foreign tourists	1 141 695	142 195	14.2	2 055 846	340 008	19.8	1.80
Total of domestic tourists	147 677	11 713	8.6	235 665	22 203	10.4	1.60
Total	1 289 372	153 908	13.6	2 291 511	362 211	18.8	1.78

Source: Statistics Estonia

The **Latvian**, **British** and **Norwegian** market shares remained unchanged, from all these markets arrived 3% of Tallinn's foreign visitors.

Latvian economy stabilised in 2010 after the big changes in 2009. Therefore economic confidence among Latvian citizens grew and activeness in travelling increased. The **Latvian** market's growth numbers in 2010 were slightly higher than the drop in numbers the previous year. Trips to Tallinn by Latvian residents grew by 8% (in total 37 700 tourists) and bednights were up by 9% (in total 56 100 nights). On a monthly basis the Latvian tourists are divided fairly evenly. Changes in the visitors' numbers are mainly influenced by events taking place in Tallinn. In 2010 the number of Latvian tourists grew most in June (+25%) and September (+23%) when the concerts of Rod Stewart and Sting took place.

Tourism numbers of the **British** market grew a little compared to the previous year. These changes in Tallinn were similar in other European cities. According to the analysis of European Tourism Commission, the demand for travelling abroad among the British is recovering (including demand for short city breaks) although they spent less time at the destination compared to the year 2009.³ In 2010, a total of 31 300 (+7%) British residents stayed in Tallinn's accommodation for a total of 72 500 bednights (+4% or 2 700 nights). Compared to previous years, trips by British travellers are shorter. British tourists were distributed evenly making Tallinn into short break destination of interest

³ <http://www.etc-corporate.org/resources/uploads/ETC-%20Feb%202011%20Trends%20and%20Outlook-final.pdf>, page 16-17

throughout the year for Britons.

Unlike the other neighbouring capital cities overall the numbers of **Norwegian** tourists and their bednights decreased. In 2010, a total of 34 800 (0%) Norwegian residents stayed in Tallinn, for a total of 83 300 bednights (-5%). Decrease in the Norwegian market can be related to deteriorating transport connection as Norwegians made more trips to nearby capitals (Riga, Helsinki, Stockholm) compared to the previous year. It is likely that this market is also stabilising as in the IV quarter Norwegian tourists trips increased and as of December Tallinn has better flight connections with Oslo.

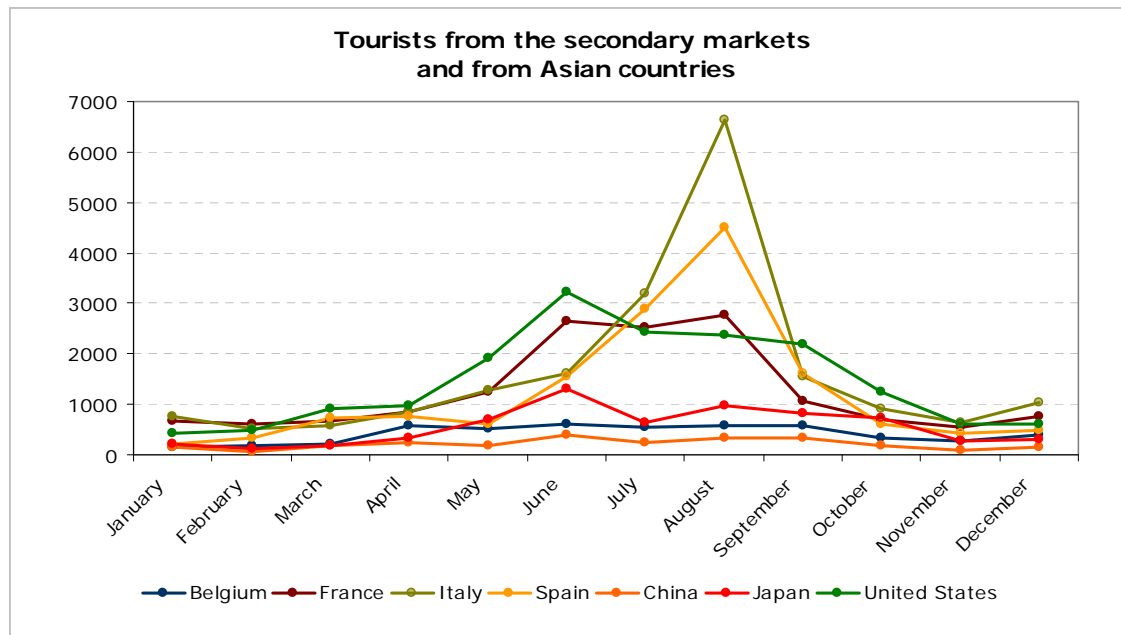
In 2010, results from secondary markets in Tallinn's tourism marketing (Belgium, Spain, Italy, France, USA) as well as Asian markets showed percentage increases in numbers. Visitors from **Spain** staying in accommodation establishments and their bednights increased although the increase of accommodated (+8%) was remarkably smaller than the increase of bednights (+22%). Also increasing were the visitor numbers from **Italy** (+18%) and **France** (+17%). Trips by those countries citizens are very seasonal and tend to take place during the summer months. Similarly to previous years most visitors from Italy and France arrived in August.

Numbers of **Belgian** tourists in Tallinn's accommodation increased by 1%, but their bednights decreased by 2%. Altogether, 5 000 visitors from Belgium stayed in Tallinn's accommodation for a total of 11 900 nights.

The decrease on the **USA** market in the previous year ended with increase as the number of tourists from that market which grew by 32% (or 4 200 tourists) and their bednights grew by 20% (6 600 nights). There were also more American citizens among cruise passengers. More American tourists visited other European cities⁴ as well, compared to the previous year. The prognosis shows increase in the demand of trips abroad among the USA tourists.

A tenth more tourists arrived from **Asia** (+13%) than in 2009, but their stays were considerably shorter than in the previous year. The numbers of tourists from China grew the most (+41%, altogether 2 600 tourists) in 2010, but their bednights grew only a quarter (+24%, totalling 4 600 bednights). More tourists also came from **Japan**, and their interest in travelling to Tallinn grew in the summer months. The numbers of tourists in accommodation grew by 4% (a total of 6 600 tourists) and their bednights grew by only 1% (a total of 11 900 bednights).

⁴ <http://www.etc-corporate.org/resources/uploads/ETC-%20Feb%202011%20Trends%20and%20Outlook-final.pdf>, page 19, 26



Source: Statistics Estonia

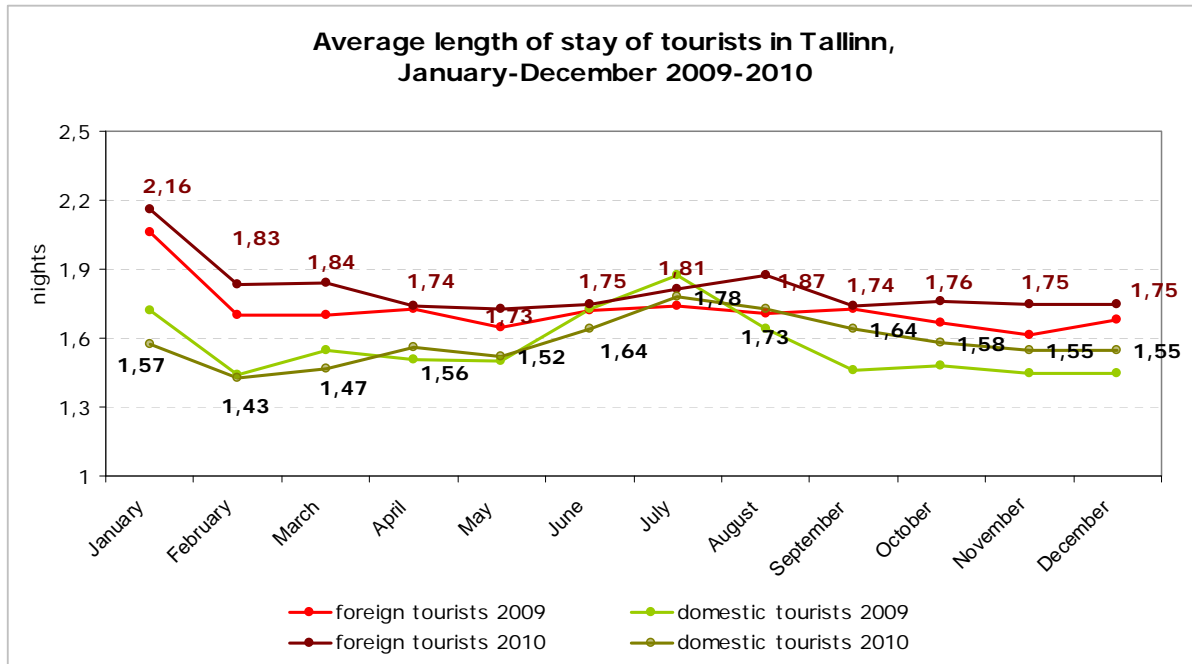
Length of Stay of Tourists in Tallinn

According to the Foreign Visitors Survey, nearly half of the foreign visitors are single day visitors and of those who stay overnight in Tallinn, nearly a tenth, does not use accommodation establishment services (i.e. they spend the night with relatives or friends). We can evaluate changes in length of stay only among those visitors who stay in Tallinn's accommodation establishments.

Both tourist numbers and bednights grew in 2010, the average length of stay in Tallinn also showed a growing trend through all months of the year. Hence, more tourists came to Tallinn, and they stayed for a longer period of time than in the previous year. **The average length of stay for tourists in Tallinn in 2010 was 1.78 nights (+5%).** The longest stays were in January (2.09 nights) and the shortest were in May (1.71 nights). The greatest increase in length of stay compared to previous year occurred in August (+10%).

The **average length of stay of foreign visitors** increased by 5%, from 1.72 to 1.80 nights. Trips by visitors from abroad were longest in January (2.16 nights) and shortest in April and September (1.74 nights). Foreign visitors' trips were longer than average in January because of the long winter holiday in Russia.

The average length of stay of domestic tourists did not change significantly (2% or from 1.57 to 1.60 nights). The length of stay of domestic tourists decreased significantly in the first quarter (January-March). Estonian residents' trips were shorter than the year before. From September onwards domestic tourists spent more time in Tallinn than in 2009. The longest length of stay for domestic tourists was in July (1.78 nights) and the shortest was in February (1.43 nights).



Source: Statistics Estonia

By **primary markets**, the longest stays in Tallinn in 2010 were spent by **Norwegians** (2.50 nights), although compared to 2009 their length of stay shortened by four percentage points. They were followed by **British tourists**, whose length of stay, at 2.38 nights, also decreased (-3%). Latvian citizens' trips in 2010 were also shorter than a year earlier (1.47 nights).

The longest visits were among **Finnish tourists**, whose average length of stay this year was 1.57 nights (+10%). **Russian** (2.11 nights), **Swedish** (1.66 nights) and **Latvian** (1.47 nights) trips remained unchanged from the previous year, although month by month the length of stay varies. The biggest change is among Russian tourists' trips as their winter trips are significantly longer than summer city breaks.

Among the secondary markets, the average length of stay grew in comparison to the previous year. Trips by the citizens of distant countries were shorter. The largest growth was among **Spanish** tourists' trips to Tallinn, whose stays grew by 14%, from 2.01 to 2.29 nights. **French** tourists' trips were also longer, growing from 2.29 nights to 2.51 nights (+9%). In comparison with 2009, **Italians** (2.43 nights) and **Belgium** tourists (2.39 nights) spent the same amount of time in Tallinn.

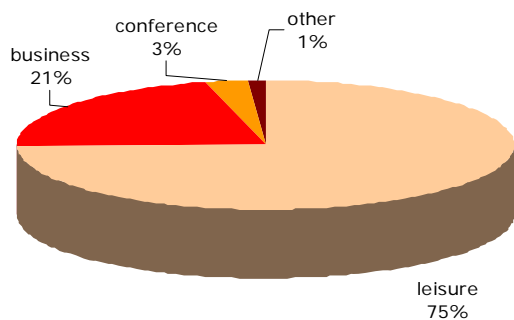
The **USA citizens**, **Chinese** and **Japanese** trips decreased in length (accordingly -9%, -12% and -3%).

Purpose of visit

In 2010, the 1.29 million tourists who stayed in Tallinn's accommodation establishments were divided according to their purpose of travel as follows: **75% leisure travellers**, **24% business travellers**, and **1% visitors with other aims** (studies, health, visiting friends).

In 2010, 963 400 leisure travellers, 275 400 business travellers, 37 600 conference-goers and 12 300 visitors with other aims stayed in Tallinn's accommodation establishments. Compared with 2009, numbers of leisure travellers grew by 15% and business trips by 22%. Conference-goers fell by 32% and travellers with other aims, by 23%. In comparison with 2009, the proportion of leisure trips and business trips grew, conference trips decreased and other trips remained unchanged.

Tourists by purpose of visit 2010



Change in tourist numbers

2009/2010

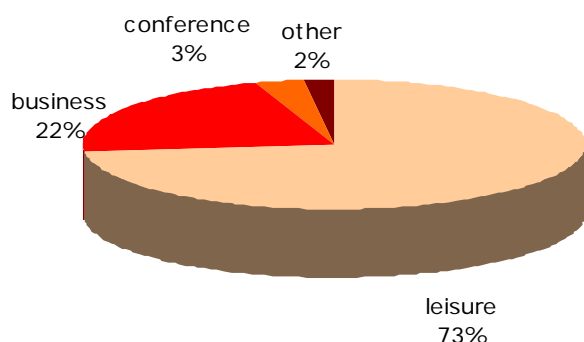
Leisure travel:	+12 700 (+15%)
Business travel:	+48 800 (+22%)
Conference travel:	-17 600 (-32%)
Other travel:	- 3 800 (-23%)
Total:	+153 900 tourists (+14%)

Source: Statistics Estonia

Looking at the changes of purpose of travel in Tallinn's accommodation establishments during the past few years, the proportion of leisure travellers has grown and proportion of other trips has fallen. Business travel has remained relatively stable. Roughly a quarter (24 to 25%) of all accommodated in Tallinn have arrived due to work.

Bednights of tourists staying in Tallinn's accommodation establishments in 2010 (total 2 291 511 nights) were divided according to purpose of travel as follows: **73% leisure travel** (total 1 682 570 nights), **22% business travel** (total 494 973 nights), **3% conference attendance** (total 67 288 nights) and **2% other purposes** (studies, health, visiting friends and acquaintances, total 46 680 nights). Hence, as with previous years, business-related travel and travel connected with other purposes were longer than leisure and conference travel.

Tourists' bednights spent by purpose of visit 2010



Change in tourists' bednights 2009/2010

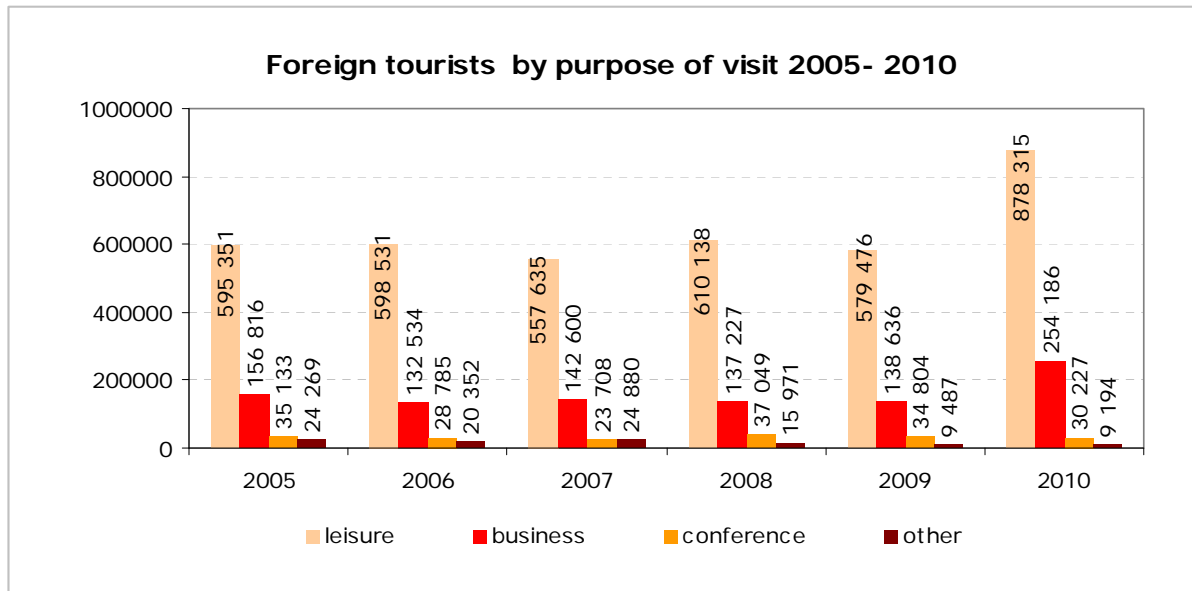
Leisure travel:	+288 700 (+21%)
Business travel:	+97 100 (+24%)
Conference travel:	-23 000 (-25%)
Other travel:	-700 (-1%)
Total:	+362 200 nights (+19%)

Source: Statistics Estonia

In 2010, 77% (in total 878 300) of bednights spent by **foreign tourists** were for leisure purposes. 22% of foreign tourists' bednights (in total 254 200) in Tallinn were for business purposes. Other purposes made up only 1% of foreign visitors' bednights (in total 9 200). In Tallinn's accommodation establishments 19% or 224 000 visitors

travelling for work purposes took part of business meetings and 3% or 30 200 participated in a conference, seminar or educational.

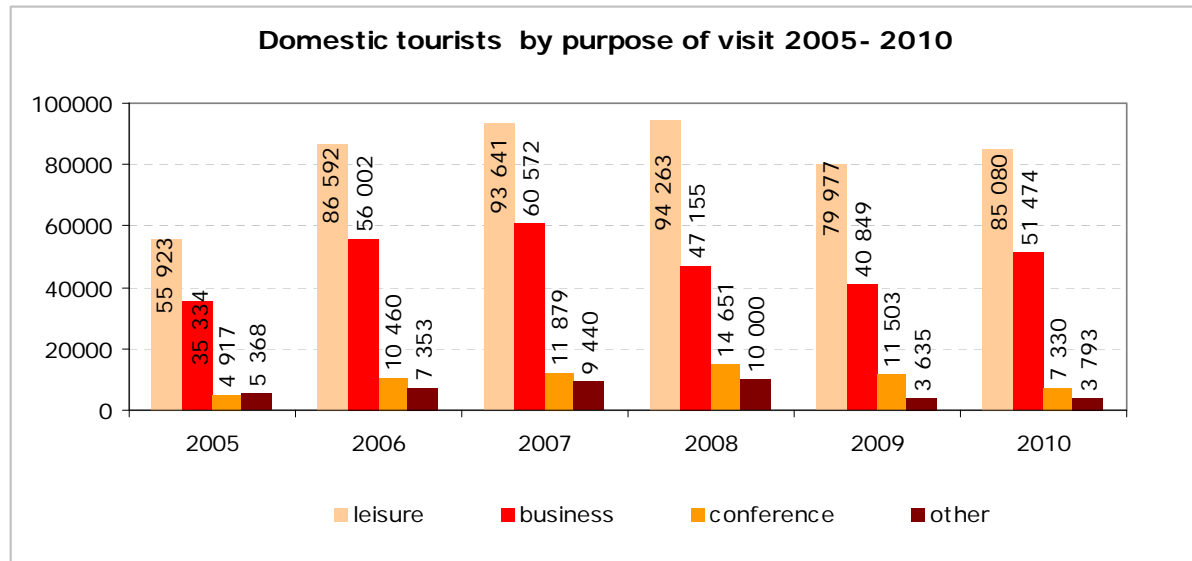
In comparison with the previous year, there were larger numbers of foreign tourists travelling for leisure purposes (+16%) and for business purposes (+21%). A third decrease (-30%) was among conference participants and also people travelling for other purposes.



Source: Statistics Estonia

Analysing the long term changes in purpose of travel among Tallinn's foreign tourists we see that there have been no major changes during the past six years. Still the market share of leisure travel has grown and trips with other purposes have decreased. The main cause for the last is probably the decrease of people travelling for medical purposes. The business travel market share has been relatively stable. During the past few years the conference travel has decreased, but other business trips (meetings with business partners, participating in meetings or product introductions etc.) have increased.

Domestic tourists spent 57% (in total 85 100) of their bednights in Tallinn for leisure purposes, 40% (in total 58 800) for business purposes (Including 5% of conference and seminar attendance) and 3% (in total 3 800) of the tourists in Tallinn's accommodation establishments stayed a night for other purposes. Trips by domestic tourists increased by 9% compared to the previous year, while travelling for leisure purposes increased by 6%, business purposes by 26% and visits with other purposes by 4%. More than a third less (-36%) conference trips were made.



Source: Statistics Estonia

Analysing long term developments we can recognize that domestic tourists trips for leisure purposes has grown while trips with other purposes have decreased. Business trips market share has been relatively stable, although proportion of conference and seminar trips as well as other business trips have changes over the years.

Tallinn's Accommodation Establishments

Keywords describing Tallinn's accommodation market in 2010 include; increased competition, decrease in prices, increase in number of accommodation establishments and revenue in sales of accommodation services.

As of December, Tallinn has 363 registered accommodation establishments with 7 607 rooms and 15 378 bed spaces. The improved economical situation encouraged growth in offering accommodation services. Added were guest apartments, home accommodation etc. Compared to previous year there were 21 new accommodation establishments, but only 67 rooms with 128 bed spaces were put on the market over the year.

Increased competition kept the prices of accommodation services on a lower level than the year before and that in every month throughout the year, although in the last quarter of the year the drop in prices was only a few percentage points. The average price of an overnight stay in 2010 was 31 Euros (486 kroons), which is 8% cheaper. Similarly to previous year, accommodation prices were lower in July 30 Euros (462 kroons) and higher in September 34 Euros (538 kroons). Compared to the rates in previous years, accommodation prices have decreased considerably. The biggest drop in prices has been in May, for example in May 2008 the average cost for overnight stay was 44 Euros (688 kroons), in 2010 the cost is 27% less or 32 Euros (504 kroons).

In 2010 the biggest drop in prices was in February and May when accommodation costs decreased by 15%. Prices changed less during the summer months (-4%) and during the last quarter of the year. The last quarter of the year can be seen as breaking point of stabilised prices and growth in revenue in accommodation establishments. There were similar trends in other European countries, where occupancy rates grew in accommodation establishments, but prices compared to previous year remained unchanged.

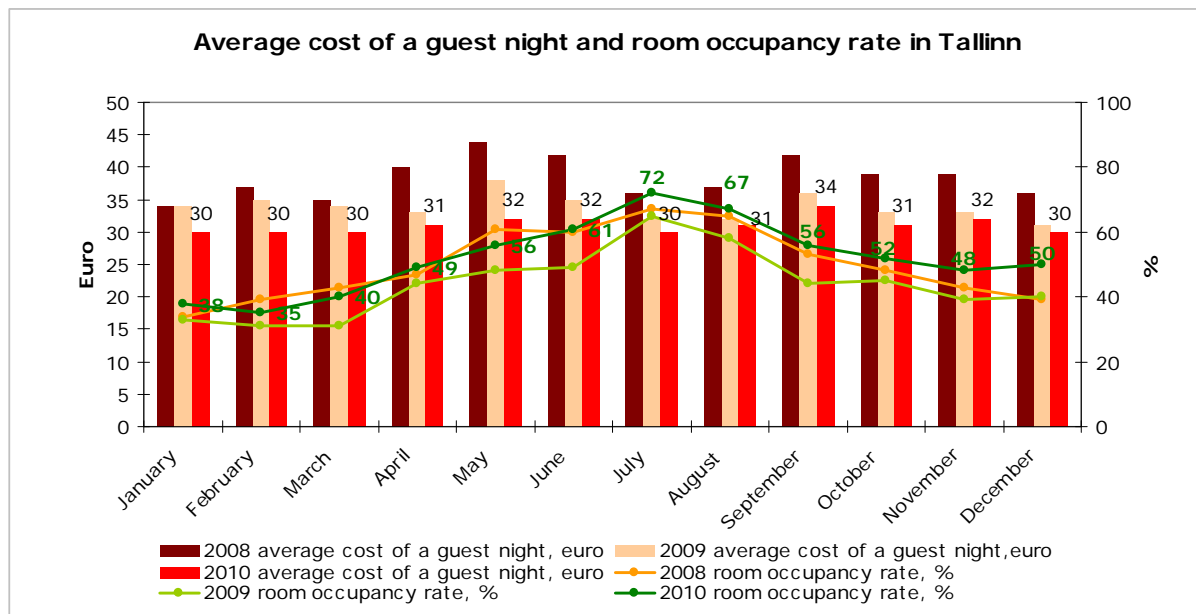
Accommodation establishments	2005	2006	2007	2008	2009	2010	Change 2009/2010 Number %	
No. of accommodation establishments	301	364	395	412	342	363	21	+6
Incl. Number of hotels	46	48	52	53	57	58	1	+2
No. of rooms in accommodation establishments	5 668	6 049	7 076	7 172	7540	7 607	67	+1
Room occupancy rate	60%	58%	55%	50%	44%	52%		+8
No. of beds in accommodation establishments	10 945	12 130	14 456	14 439	15 250	15 378	128	+1
Bed occupancy rate	52%	49%	47%	42%	36%	44%		+8
Average cost of a guest night (kroons)	582	598	604	601	529	486	-49	-8
Average cost of a guest night (Euros)	37	38	39	38	33	31	3	-8

Source: Tallinn City Tourist Office & Convention Bureau, Statistics Estonia

Room occupancy rate also grew compared to the previous year by eight percentage points. Room occupancy rate was higher than in 2009 in every month of the year. In January, April and all the months in the second half of the year the room occupancy rates were higher than even in 2008.

On Average, 52% of all the available rooms were occupied. The month with highest occupancy was July with 72% of the available rooms occupied. The lowest month was February (35%) and January (37%).

The revenue of Tallinn's accommodation establishments from sales of accommodation services amounted to 70,9 million Euros (1.11 billion kroons), which is 10% more compared to the previous year. The growth was significantly influenced by increase in visitor numbers, longer length of stay and a halt in falling prices.



Source: Statistics Estonia

Travellers at Tallinn Lennart Meri Airport

A total of 1.38 million passengers (+3%) travelled through Tallinn Airport in 2010. Increase in passenger numbers was influenced by increased number of direct flights and different destinations being added in spring time. International flights accounted for 98% of flights. Domestic flights increased, but the proportion was still small accounting for only 2%. 85% of the passengers flew on regular flights.

Analysing changes in passenger numbers month by month shows that the number of passengers dropped most in April, when the volcanic ash cloud stopped flight traffic above Estonia for almost a week. The decrease in the percentage was also at the beginning of the year (January -11%, February -9% and March -4%). Passenger numbers started to grow as of May. Changes in traveller numbers at Tallinn Airport depended significantly on the number of international regular flights.

During the first three months of 2010 regular flights operated from Tallinn to 21 destinations, in the summer months the number grew to 32 destinations and during the last three months of the year there were 24 different destinations. Opening up most new regular flights, was airline Estonian Air. The greatest market share in Tallinn Airport in 2010 continued to be held by Estonian Air (39%), followed by AirBaltic (14%) and Finnair (11%). Altogether, 14 airline companies offer regular flights out of Tallinn, two more companies than the year before. As of December, budget airline Ryanair launched regular flights to new destinations from Tallinn. Influences to the market by that company can be evaluated in 2011. The market share of Estonian Air decreased by three percentage points and market share by Air Baltic grew by a percentage point.

A study among passengers in Tallinn Airport showed that 54% of passengers on regular flights were business travellers, 41% were leisure travellers and 5% were travelling for other purposes. This distribution is more or less similar to the year before. In comparison with 2009, the proportion of passengers who cited other purposes shrank and the proportion of leisure travellers grew. More than half of the flight travellers are from Estonia (59%), followed by Sweden and Great Britain (both 5%), Germany and Norway (both 4%).

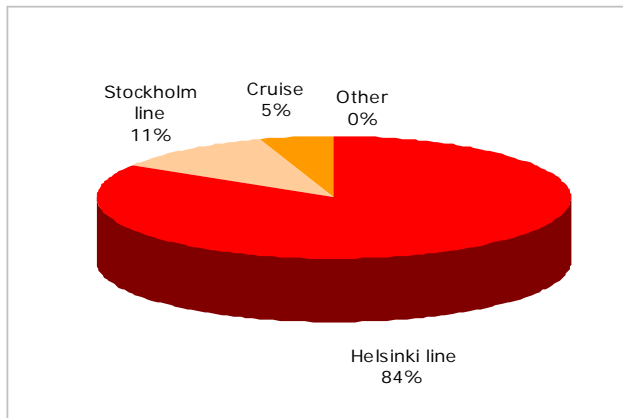


Source: Statistics Estonia

In comparison with 2009, although the number of destinations and regular flights grew, but there were no changes among the TOP destinations list. The most in demand flights from Tallinn Airport were to Helsinki (13% share of the total passenger number of regular flights), Riga (12%) and Copenhagen (12%).

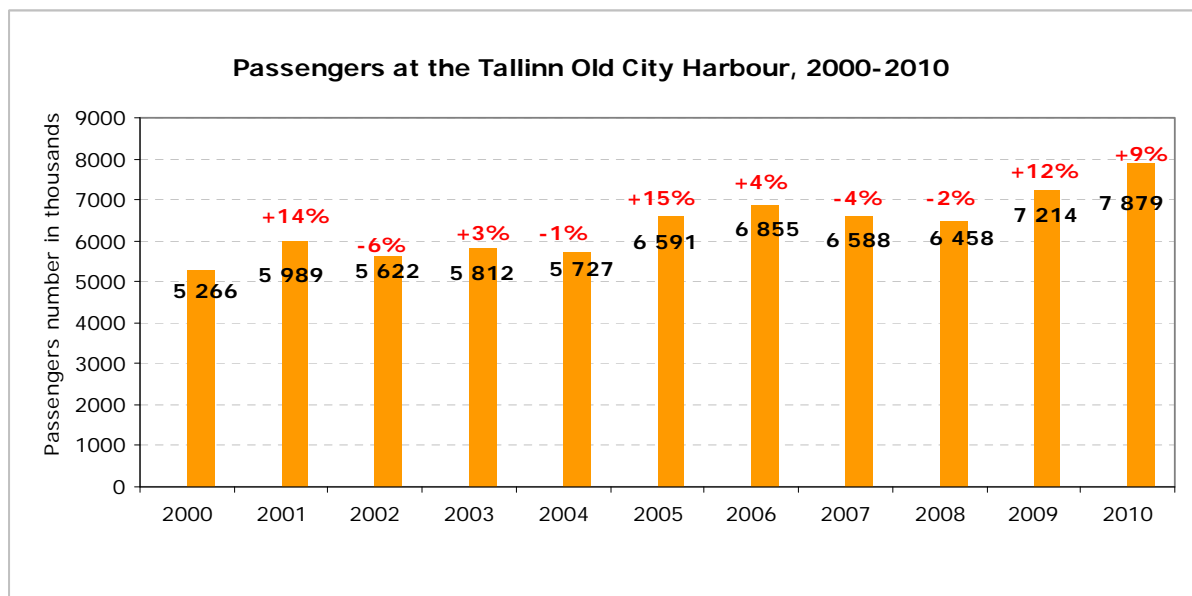
Passengers at the Tallinn Old City Harbour

In 2010 the number of passengers passing through Tallinn Old City Harbour grew by a tenth (+9%). Altogether, **7.88 million passengers were served in Tallinn Old City Harbour** and that set a new record in number of passengers in Tallinn Old City Harbour.



The largest portion of passengers in Tallinn Old City Harbour were travelling on the Tallinn-Helsinki line, making up 84% of all the passengers in 2010. Compared to 2009, the number of passengers travelling on the Finnish connection grew by almost a tenth (+9%). The number of passengers on that line were influenced by ferry companies' discounted offers. A tenth (11%) of the passengers were travelling on Swedish connection. Although the number of travellers grew by 3% compared to 2009, the share of passenger numbers on that connection did not grow in numbers.

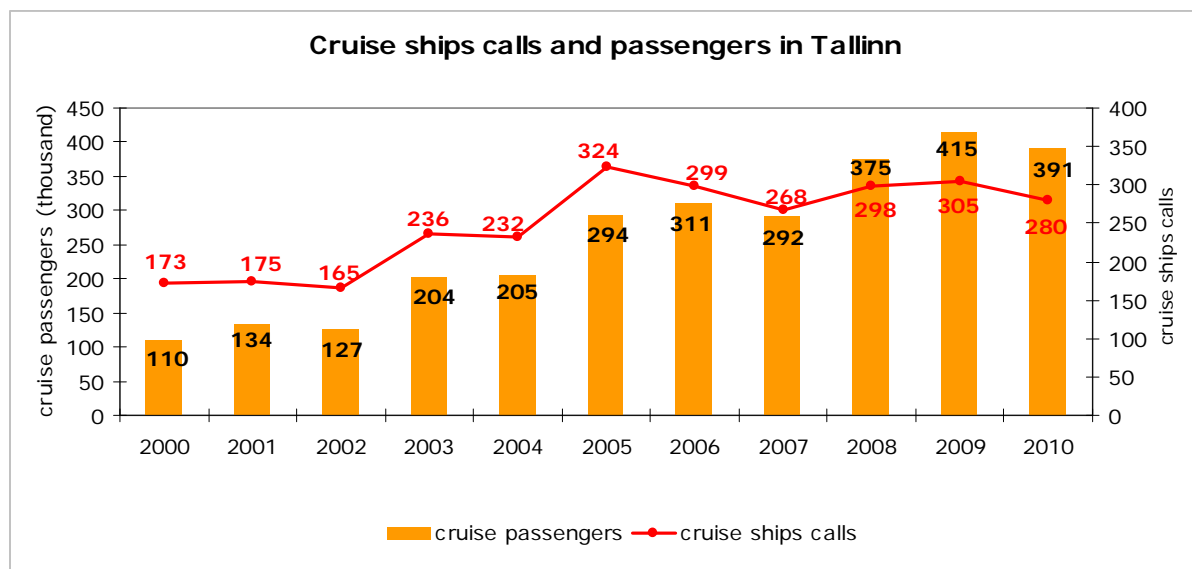
The greatest number of passengers were served by Tallink (61% of all passengers), followed by VikingLine (22%) and EckeröLine (12%). The greatest number of passengers were served by VikingXPRS ferry on Finnish connection.



Source: Port of Tallinn

Cruise passengers made up 5% of all passengers travelling through Tallinn Old City Harbour, a total of 391 000 passengers (-6%). Cruise ships made 280 calls to Tallinn Old City Harbour, a decrease of 25 harbour calls from the previous year. The greatest number of cruise ships calls and cruise passengers were in August (77 visits and 111 100 passengers). Most of the cruise passengers visiting Tallinn were from Germany 19%, followed by the USA 18%, Great Britain 16%, Spain 11%, Italy 7%, Canada 4% and Russia 4%. Growing significantly in 2010 was the number of cruise passengers from Russia.

Cruise passengers' survey by Tallinn Port showed that the travellers were satisfied with their experiences in Tallinn (average rating of 4.6 points on a 5 point scale). Visitors regarded, the Old Town, churches, Town Hall Square, Hansa market and Olde Hansa restaurant as the most memorable places in Tallinn. On average, each cruise tourist spent 567 kroons in Tallinn during their visit which is considerably more compared to previous year. Tallinn Port estimated 14.1 million Euros (221.7 million kroons) in financial profit from cruise passenger purchases.



Source: Port of Tallinn

Tallinn's Revenue from Tourism

Estonian export of tourism services in 2010 (i.e. all expenditures in Estonia by foreign visitors in connection with their trip, including accommodation, dining, entertainment, shopping, etc.) totalled 1.08 billion Euros, according to the Bank of Estonia, of which Tallinn's share of the revenue can be estimated at 85%. Compared with 2009, Tallinn's revenue from foreign tourism is estimated to be 915 million Euros, an increased of 4%.

Compared with 2009, the **export of travel services** grew by 5%, totalling 653 million Euros. **Export of passenger transport** (payments by foreign visitors to Estonian transportation companies) came to a total of 262 million Euros (+3%), included payments to ferry companies grew (+4%), but dropped in payments to air companies (-5%).

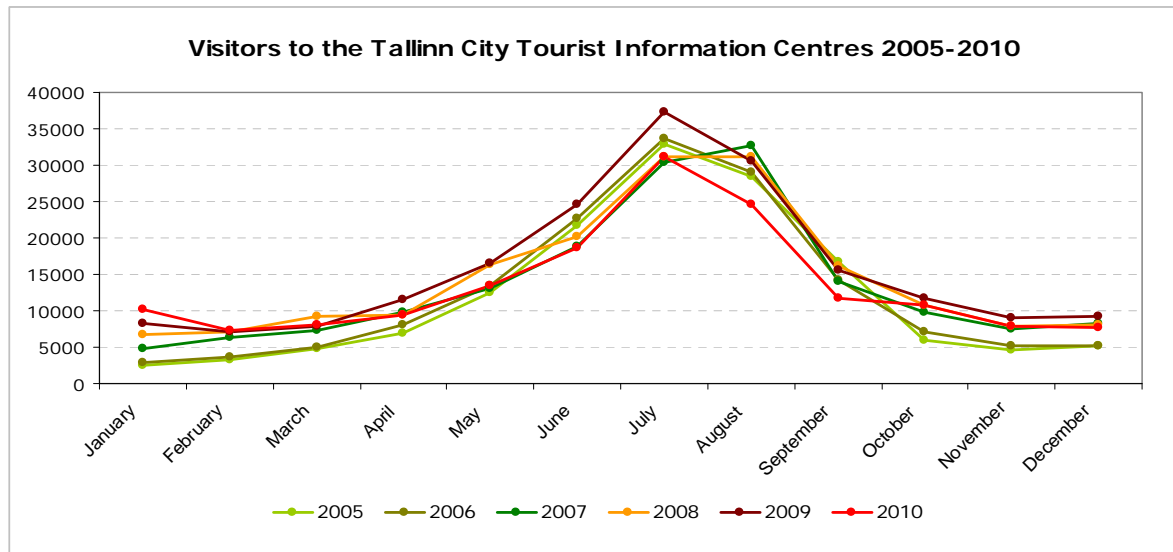


Source: Bank of Estonia

Visits to Tallinn Tourist Information Centres and Tourism Website

In 2010, Tallinn's two **Tourist Information Centres** (in the Old Town and Viru Shopping Centre) were visited by **a total of 161 000 visitors, of whom 90%, or 145 200 came from abroad and 10%, or 15 800 were from Estonia**. Compared to 2009, the number of visitors fell by 15%, or 28 600 visitors. Visitors came from 117 countries, including the new additions of visitors from Chechen, Kosovo, Qatar and Jordan. Visitors from Finland (37 000) paid the greatest number of visits to the Tourist Information Centres, followed by Russians (20 500), Germans (15 000) and Swedes (11 000).

A total of 156 600 queries came into the Tourist Information Centres in 2010, amounting to 12 400 or 8% less queries than the previous year. Trends from previous years continued: numbers of queries presented in person at the Information Centres grew, while numbers of queries sent by post, fax and email shrank. The most frequent topics of interest were transportation connections, city maps and shopping information. There was more interest in museums and sights than earlier, but fewer queries about shopping and services.

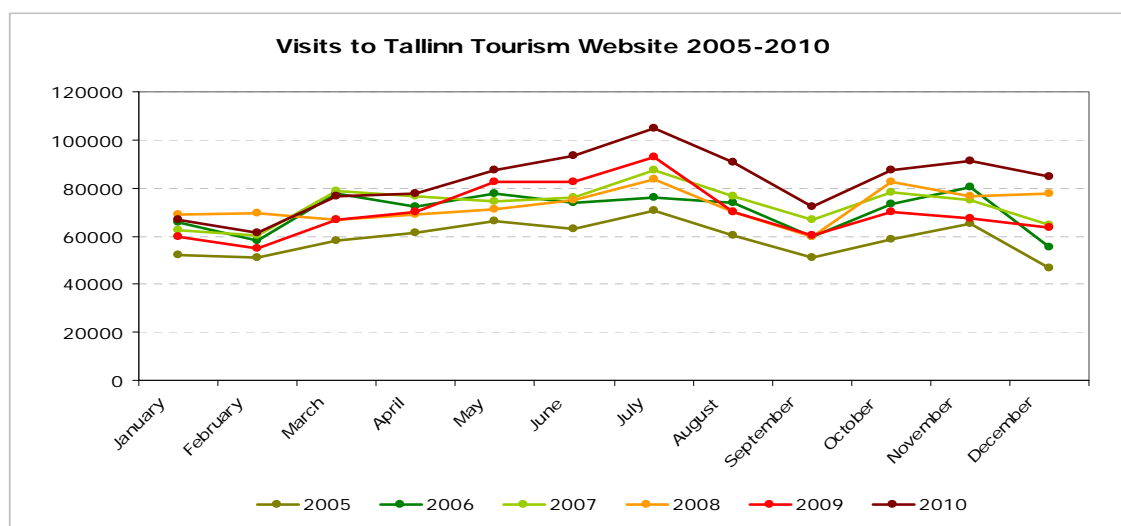


Source: Tallinn City Tourist Office and Convention Bureau

The decline in queries coming in via post, fax and email is connected with more active use of the tourism website. The **Tourism Website** was visited 988 900 times in 2010 (+18%). In terms of different language environments, the most viewed was the English-language website (39%), followed by Finnish (25%), Russian (17%), Estonian (8%), Swedish (6%) and German site (4%). The Japanese and Chinese sites (added in 2009) comprised 1% of views.

Compared to a year earlier, the use of the Finnish-language website grew by four percentage points and Russian-language site by two percentage points, whereas English, Estonian and Swedish language sites were visited less. The most frequently read topics included the city's sights and travel planning, followed by entertainment, Tallinn Card and events information. Sub-pages in the Tourism Website were viewed 5 million times (+18%), and during each visit, the user viewed an average of 5 pages.

Mobile application www.tallinn.mobi was visited over 2000 times and over 13 800 pages of Tallinn's tourism information were browsed (6.7 pages per visit). In 2010 the active promotion of Tallinn as a tourist destination in social media environments continued. The VisitTallinn Facebook account attracted 6 500 (+ 4 000 fans) fans by the end of the year, the TallinnCity Twitter account gained 600 (+250) followers, and photos in the TallinnCity Flickr account were viewed close to 15 000 times



Source: web-stat.com

Tourists accommodated in Tallinn in 2010, number of nights spent and length of stay

Country of origin	No. accommodated	Change 2009/2010		Bednights	Change 2009/2010		Length of stay
		No.	%		No.	%	
Albania	127	52	69,3	299	36	13,7	2,35
Austria	4 081	-983	-19,4	10 528	-591	-5,3	2,58
Belgium	4 975	63	1,3	11 878	-209	-1,7	2,39
Bulgaria	1 422	628	79,1	5 082	1 923	60,9	3,57
Czech Republic	3 245	-704	-17,8	7 342	-263	-3,5	2,26
Croatia	640	207	47,8	1 344	96	7,7	2,10
Cyprus	384	76	24,7	1 258	398	46,3	3,28
Denmark	9 250	-367	-3,8	18 885	-1 660	-8,1	2,04
France	15 077	2 159	16,7	37 782	8 172	27,6	2,51
Germany	57 827	8 219	16,6	118 200	15 461	15,0	2,04
Great Britain	31 290	1 956	6,7	72 458	2 769	4,0	2,32
Greece	3 281	1 138	53,1	7 529	2 716	56,4	2,29
Holland	8 198	24	0,3	18 476	207	1,1	2,25
Hungary	2 199	379	20,8	6 978	2615	59,9	3,17
Ireland	1 799	-156	-8,0	4 805	-13	-0,3	2,67
Island	646	222	52,4	1 672	767	84,8	2,59
Italy	19 588	2 935	17,6	47 599	7 508	18,7	2,43
Finland	595 553	60 968	11,4	935 818	173 719	22,8	1,57
Latvia	37 714	2 734	7,8	56 117	4 713	9,2	1,49
Lithuania	23 267	1 136	5,1	37 672	1 306	3,6	1,62
Luxembourg	789	220	38,7	1 462	212	17,0	1,85
Malta	217	3	1,4	447	-130	-22,5	2,06
Norway	34 758	-121	-0,3	83 349	-3 963	-4,5	2,40
Spain	14 689	1 020	7,5	33 616	6 085	22,1	2,29
Sweden	59 247	1 389	2,4	98 450	2 732	2,9	1,66
Portugal	2 153	-222	-9,3	6 820	782	13,0	3,17
Poland	15 711	2 232	16,6	28 769	3 831	15,4	1,83
Romania	1 120	138	14,1	2 622	514	24,4	2,34
Russia	103 151	33172	47,4	217186	70 289	47,8	2,11

Country of origin	No. accommodated	Change 2009/2010		Bednights	Change 2009/2010		Length of stay
		No.	%		No.	%	
Slovakia	1 280	551	75,6	3 174	1 224	62,8	2,48
Slovenia	744	111	17,5	1 572	-186	-10,6	2,11
Switzerland	5 603	1 346	31,6	10934	2 112	23,9	1,95
Turkey	3 145	701	28,7	8 426	3143	59,5	2,68
Ukraine	4 261	1047	32,6	9 818	1 993	25,5	2,30
Other European countries	20 861	6190	42,2	38 031	9 324	32,5	1,82
African countries	1 028	164	19,0	2 404	402	20,1	2,34
Incl. Republic of South Africa	223	-14	-5,9	522	3	0,6	2,34
Asian countries	15 531	1787	13,0	29 617	3 908	15,2	1,91
Incl. China	2 565	739	40,5	4 606	878	23,6	1,80
Incl. Japan	6 625	252	4,0	11 901	124	1,1	1,80
Incl. South Korea	1 867	621	49,8	2 986	1 230	70,0	1,60
United States of America	17 452	4207	31,8	38 919	6 558	20,3	2,23
Canada	2 594	-591	-18,6	5 861	-2 888	-33,0	2,26
South and Central American countries	3 238	1259	63,6	7 186	3 036	73,2	2,22
Incl. Brazil	1 840	733	66,2	4 012	1 657	70,4	2,18
Australia, Oceania	3 765	-233	-5,8	8 818	-428	-4,6	2,34
Incl. Australia	3 201	-166	-4,9	7 507	-289	-3,7	2,35
Other countries	9 795	7139	268,8	1 6643	11 788	242,8	1,70
Total foreign tourists	1 141 695	142 195	14,2	2 055 846	340 008	19,8	1,80
Total Estonian residents	147 677	11 713	8,6	235 665	22 203	10,4	1,60
Grand total	1 289 372	153 908	13,6	2 291 511	362 211	18,8	1,78

Source: Statistics Estonia

Compiled by: Karen Alamets, analyst of Tallinn City Tourist Office & Convention Bureau
For more information, see www.tourism.tallinn.ee/statistika