

Tourism in Tallinn 2011

In 2011 altogether 2.73 million tourists stayed in Estonian accommodation enterprises, more than half of them (55%) stayed in Tallinn.

Tourists in Tallinn: 1 498 500 (+16%)¹
Bednights in Tallinn: 2 791 100 (+22%)

Total foreign tourists: 1 333 800 (+17%)
Bednights of foreign tourists: 2 504 700 (+22%)

Total domestic tourists: 164 700 (+12%)
Bednights of domestic tourists: 286 400 (+22%)

From the primary markets the greatest growth in bednights came from Great Britain and Russia

Finland: 957 900 nights (+2%)
Russia: 301 400 nights (+39%)
Great Britain: 160 600 nights (+122%)
Germany: 160 400 nights (+36%)
Sweden: 110 300 nights (+12%)
Norway: 103 800 nights (+24%)
Latvia: 66 100 nights (+18%)
Italy: 70 700 nights (+49%)
USA: 44 400 nights (+14%)
France: 43 200 nights (+14%)
Spain: 53 400 nights (+59%)
Belgium: 17 200 nights (+45%)
Japan: 14 200 nights (+20%)
China: 8 500 nights (+84%)

Increase in length of stay

Tourists' average length of stay in Tallinn was 1.86 nights (+5%).

Stays by:

Foreign tourists: 1.88 nights (+4%)
Domestic tourists: 1.74 nights (+8%)

The majority of tourists came to Tallinn for leisure

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

Domestic tourists spent 60% of their

bednights for leisure purposes, 33% for business, 4% conference attendance and 3% for other purposes.

Room occupancy rates in accommodation enterprises and the average price for the overnight stay increased

358 accommodation enterprises were registered in Tallinn at the end of 2011, with 7 577 rooms and 15 377 beds. **The average room occupancy rate** in the year was **60%** and this was 8% higher than the previous year. **The average overnight prices** shaped up to be **33 Euros** per guest which is 7% more expensive than the previous year.

Numbers of air passengers and travellers by sea increased

Tallinn Airport served altogether 1.91 million passengers (+38%). Regular flights to 36 different destinations took place, with the most serviced lines being Helsinki, Riga, London and Stockholm.

Passengers in Tallinn Old City Harbour totalled 8.45 million (+7%), of whom 83% travelled on the Tallinn-Helsinki route, 11% on the Tallinn-Stockholm line, 1% on the Russian route and 5% being cruise passengers. **293 cruise ships and 438 000 cruise passengers** visited Tallinn in 2011. 19% of the cruise passengers were from Germany, 17% from the USA, 15% were from Great Britain, 12% from Spain and the rest 37% from 147 different countries.

International visitors more and more satisfied with Tallinn

International tourists' satisfaction with, the time spent in Tallinn and the surrounding areas, and their evaluation of services both improved. Practically all visitors would suggest Tallinn as a travel destination to friends and acquaintances.

Increase in visits to Tallinn Tourist Information Centres

Tallinn Tourist Information Centres served 180 000 visitors (+12%). Foreign visitors originated in total from 117 countries, but mostly from Finland (36 500), Russia (22 000) and Germany (21 200).

¹ Comparison with year 2010

Tallinn accommodation enterprises

The key factor characterising Tallinn' accommodation market in 2011 was considerable growth in demand. There was a gradual rise in the prices of accommodation and accommodation enterprises income growth from sales of accommodation services.

In December (by 15.12.2011) there were 363 registered accommodation enterprises which together offered 7 577 rooms and 15 377 beds. In comparison to the previous year accommodation enterprises were reduced by five, but the available number of bed places did not changed. Neither the number of hotels nor the accommodation capacity has changed. The amount of accommodation establishments offering guest apartments or home accommodation decreased in comparison to previous year.

Accommodation enterprises	2006	2007	2008	2009	2010	2011	Change in% 2010/2011	
Number of accommodation enterprises	364	395	412	342	363	358	-5	-1
Incl. number of hotels	48	52	53	57	58	58	0	0
Number of rooms in accommodation enterprises	6 049	7 076	7 172	7540	7 607	7 577	-30	0
Number of beds in accommodation enterprises	12 130	14 456	14 439	15 250	15 378	15 377	-1	0

Tallinn's accommodation enterprises had average room occupancy of 60% in 2011 and in comparison with previous years this grew by eight percentage points. Room occupancy rates started to gradually increase already at the beginning of 2010. This year the trend continued, the quickest room occupancy rate growth was during the high season (May to September) when in the year the comparable increasing occupancy was more than 10 percentage points. The highest occupancy was in July when 83% of rooms of the accommodation enterprises were filled, the lowest point was the beginning of the year (January 44%, February 43% and March 44%).

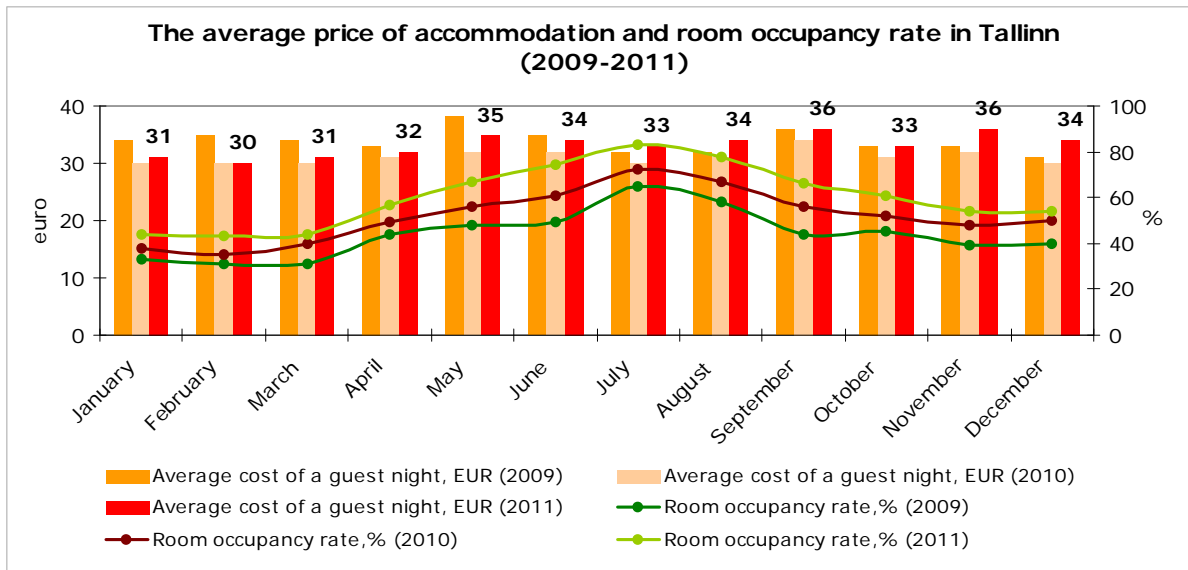
The average price in 2011 overnight stays was 33 Euros per tourist, 7% more expensive than the previous year. The overnight average cost stabilised in 2010 in the last quarter of the year and started to grow in the second quarter of 2011. In the last quarter of the year growth in prices was quicker than in previous months.

In 2011 the biggest price rise was in November and December as accommodation costs became more expensive by 13%, the smallest change in prices happened in the first third of the year (January to April 0-3%). Accommodation prices were lower at the beginning of the year (in February 30 Euros) and higher in September and November (36 Euros). In comparison to accommodation prices with earlier years, the prices were relatively higher, but still lower than before the economic slump in the previous years.

There were similar accommodation enterprises trends in room occupancy rates, prices and room performance (RevPAR) in other European countries².

The last quarter of 2010 can be considered a turning point in the growth of income of accommodation enterprises. In 2011 accommodation enterprises' income growth continued and the percentage of growth was bigger than last year. **In 2011 accommodation enterprises in Tallinn earned from the sale of accommodation services altogether 92.9 million Euros.** In comparison to the previous year the income of accommodation establishments grew by a third.

² http://www.etc-corporate.org/resources/uploads/ETC_European_Tourism_Q4_2011.pdf, page 11-12

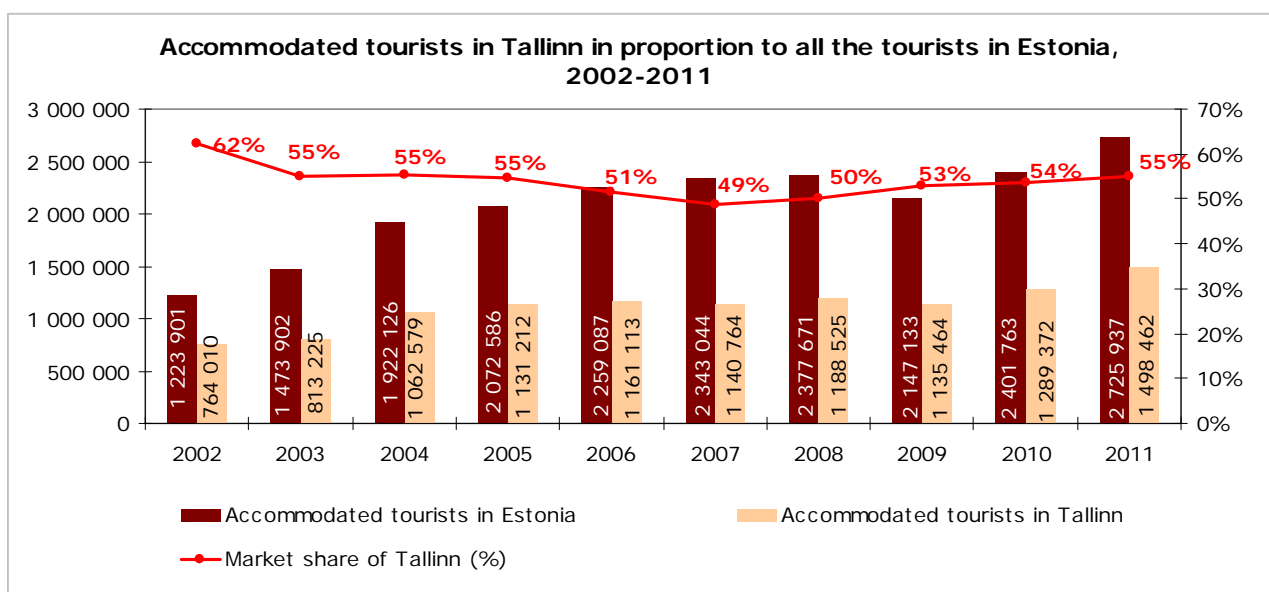


Source: Statistics Estonia

Tourists staying in Tallinn’s accommodation enterprises

In 2011, a total of 2.73 million tourists (+3%) spent the night in Estonian accommodation enterprises. 66% of them, or 1.81 million, were residents of foreign countries (+16%), who stayed for a total of 3.75 million bednights (+17%). 918 100 domestic tourists (+10%) stayed in Estonian accommodation enterprises for a total of 1.65 million bednights (+10%). For Estonian accommodation establishments this is an all time record year of tourists as well as bednights.

Half (55%, in total 1.50 million) of the tourists staying in accommodation spent the night in Tallinn. **A total of 1 333 800 (+17%) foreign tourists and 164 700 Estonian residents (+12%) stayed in Tallinn’s accommodation enterprises in 2011.** The number of people (both foreign and domestic) staying in accommodation enterprises increased by 16%, or 209 100 tourists, in comparison with 2010.



Source: Statistics Estonia

With the past 4 years Tallinn’s share in Estonia’s tourism has grown; in 2011 55% 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. 74% of the foreign tourists and 18% of the domestic tourists in Estonia stayed overnight in Tallinn's accommodation enterprises. Therefore a large part of foreign tourists who stay overnight in accommodation enterprises, stay in Tallinn.

The year 2011 started with the anticipated growth for accommodation enterprises and **in the first quarter 16% more tourists stayed overnight compared to 2010**. In January, in addition to the New Year's celebrations and Orthodox Christmas holiday, the opening ceremony of the European culture capital brought foreign tourists to Tallinn. In February and March, improved flight connections with Europe's big cities and discounted short holiday packages increased the number of visitors. Ryanair's new flights brought in the first quarter significantly more visitors from Great Britain and Norway. Also the biggest market Finland grew continually. As a positive direction at the start of the year the number of domestic holiday makers grew.

In the second quarter the increase in tourist numbers was about a fifth (+19%). The most influential thing on tourist numbers were improvements in transportation; for example the summer flight schedule, Tallinn - St. Petersburg cruise line and EasyJet direct flights. The number of cruise visitors increased with the first cruise ship turnaround. It is likely that foreign tourists also visited Tallinn due to international conferences (European Academy of Management Annual Conference, International Conference on Cyber Conflict, annual seminar of AECM etc) and events (Jazzkaar, Old Town Days, Nargen Festival, World Village Festival and Straw Theatre etc).

In the third quarter growth in accommodation numbers continued (+17%) and trips lengthened. Important events which influenced the number of visitors were the Youth Song and Dance Celebration, Beer Summer, Maritime Days, Brigitta Festival, festivals in August and SEB Tallinn Autumn run and Marathon. High rise in percentages in the third quarter were guaranteed by the foreign visitors numbers significant growth during the tourism high season (July and August). Improved flight connections increased the number of visitors from Russia, Germany and Great Britain. The citizens of neighbouring countries Latvia and Finland were fascinated by September sports events and the British came to see Championship Cup in football with the Northern Ireland team.

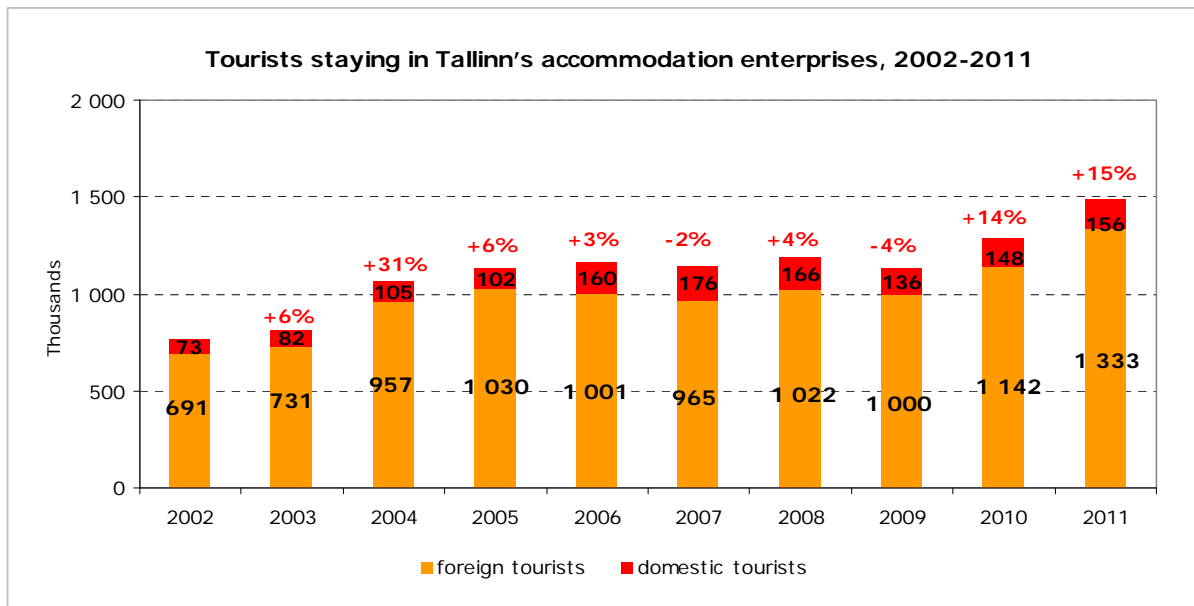
In the last quarter of the year, tourist number growth percentage shrank compared with previous months (+13%). Negative news about the European Union's economic situation and increasing inflation increased Estonians uncertainty about economic growth and decreased domestic bednights number in every month of the quarter. Foreign visitor numbers however grew, although the percentage of growth was smaller than previously. In October and November the number of foreign visitors were influenced mostly by events in Saku Suurhall (concerts by band Hurts, Mirelle Mathieu and Sade, the Estonian handicraft show St. Martin's Fare etc). In the first part of December there were more visitors from Finland celebrating "Pikkujoulu". At the end of the month Russian tourist came for winter breaks. During this quarter there was a visible influence in tourist numbers from Ireland due to the November 11 Estonia-Northern Ireland football match, which increased the number of visitors from Ireland 28 times compared to the November previous year.

Bednights increased compared with the previous year more than a fourth. Month by month the bednights number changed similarly to the changes in the tourist numbers. **In Tallinn accommodation enterprises 2.29 million nights were spent (+22%).** Growth in the number of foreign visitors' bednights and domestic visitors' bednights was the same (+22%). Altogether foreign visitors spent, in Tallinn's accommodation enterprises, 2 504 700 bednights and Estonians 286 400 bednights.

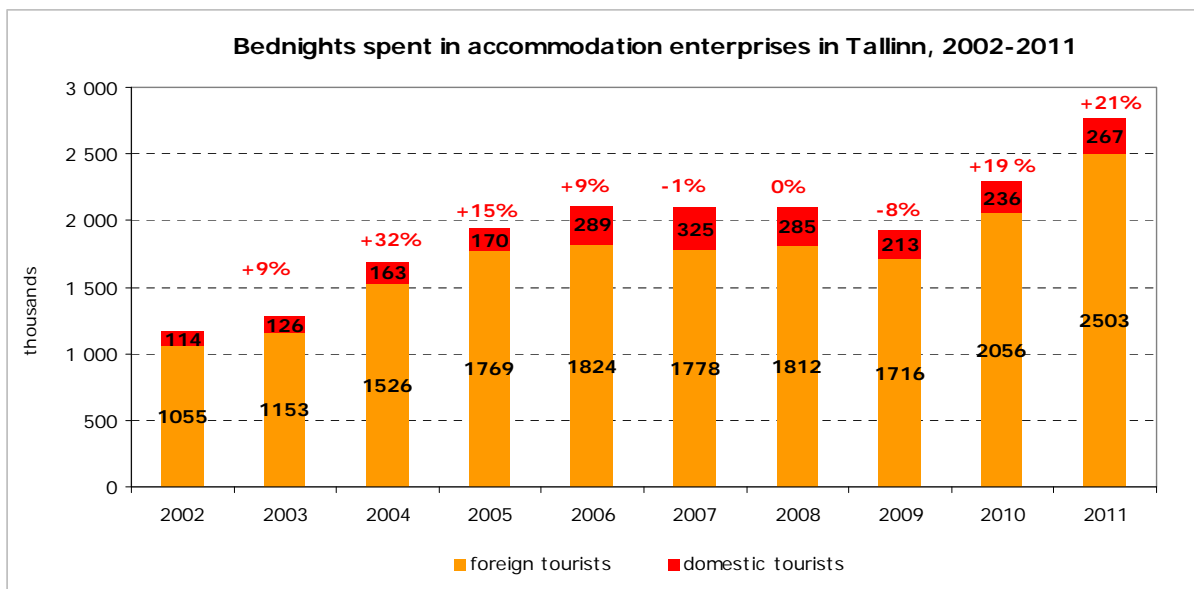
Analysing the overnight stay numbers month by month we can see that the tourist bednight number grew in every month compared to the year before, growth was in double numbers every month and the growth was fastest in the first half of the year.

There was wide range of changes in domestic tourism demand during the year. Domestic bednights decreased in October (-12%) and November (-12%), the rest of the months the Estonian bednights number grew with the largest figure in August (+68%). The growing number of domestic holidays is principally due to the growth of leisure trips, but there was also important increase among conference travellers during the year.

90% of Tallinn's overnight stays were foreign tourists' bednights. Foreign visitors' bednight numbers grew in all months and the percentage of growth was a double figure number (+12% up to +29%). Foreign tourists' bednight growth number was principally from countries with improved transport links. The fastest bednight growth was in September (+29%) and June (+28%), the smallest growth was in March (+12%). In the other months the increase in bednight figures was between 17-24%.



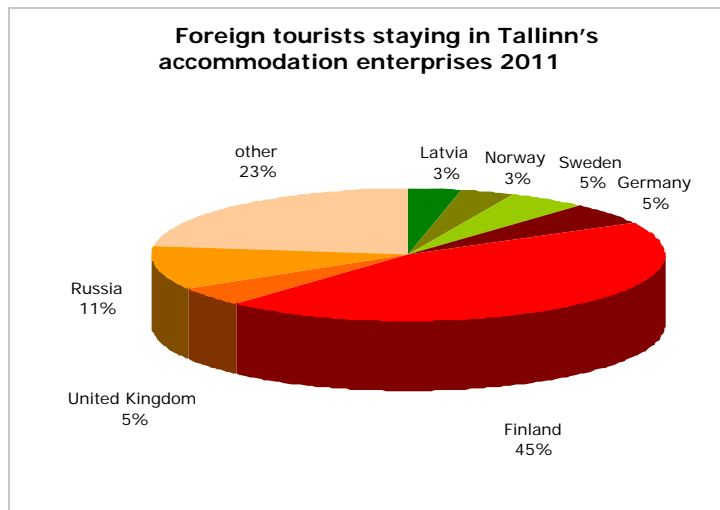
Source: Statistics Estonia



Source: Statistics Estonia

According to the Foreign Visitors Survey³ 2.72 million foreign visitors stayed in Tallinn's accommodation enterprises 49%. Among the visitors staying in accommodation enterprises the most numerous were 35-54 years olds, travelling with partners, working as entrepreneurs, managers and specialists, citizens of Finland, Russia and Germany.

Tourists from **Tallinn's primary target markets** (Finland, Sweden, Germany, Great Britain, Norway, Russia and Latvia) made up 77% of all foreign tourists in 2011. There were changes in the primary market's share numbers and tourism market variegated. Great Britain's and Russia's market share grew by 2% and other foreign countries share by 4%. German, Latvian and Norwegian market shares remained unchanged. The share of the Finnish market decreased by 8 percentage points.



Russia: +38% (+39 500)

Great Britain: +106% (+33 100)

Germany: +27% (+15 400)

Norway: +31% (+10 700)

Latvia: +18% (+6 800)

Finland: 0% (-100)

Source: Statistics Estonia

Most of the foreign tourists staying in accommodation arrived from **Finland** (45%). The number of Finnish tourist staying at accommodation enterprises did not change, but the length of stay increased compared to previous year.

Altogether 595 500 Finns (0% or 100 tourist less) stayed overnight in Tallinn's accommodation enterprises during the year with total of 957 900 bednights (+2 or 22,000 bednights more). The number of accommodated Finns grew in seven months (January, February, June, September until December), in the peak months visitor numbers decreased.

Most Finnish tourists arrived during the summer months. There is less interest in trips to Tallinn at the beginning of the year. During the other months the number of Finnish tourists depended on the events in Tallinn and discounted offers by accommodation establishments or ferry companies.

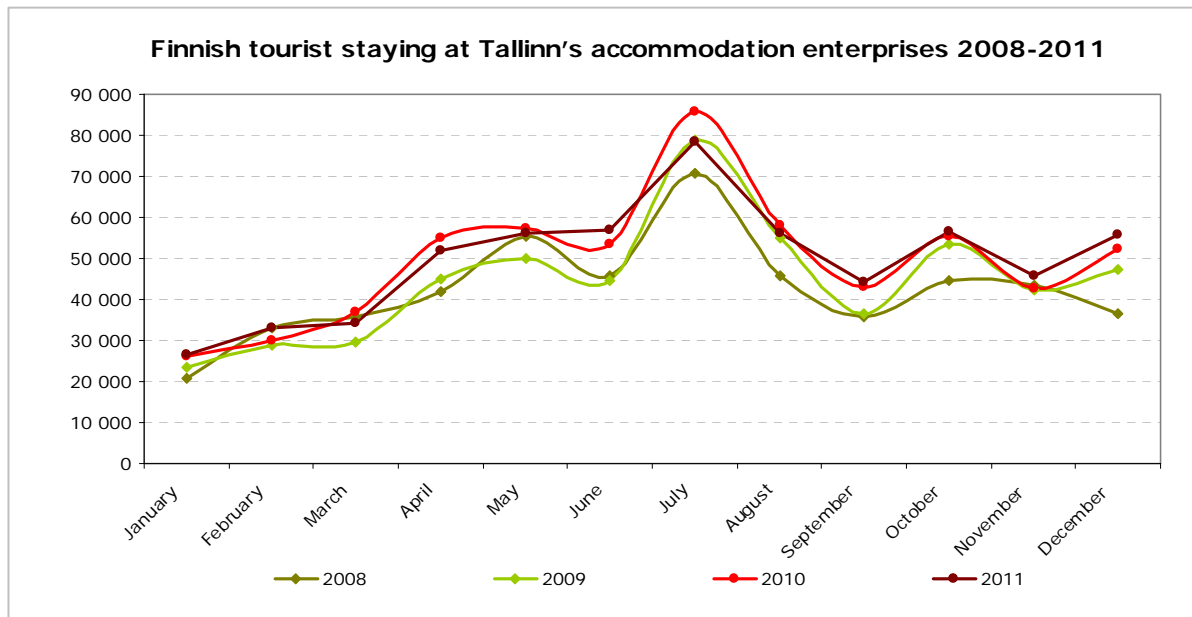
Analysing market behaviour in 2011, we see that both the numbers of Finnish tourists in accommodation establishments and the numbers of their bednights grew most in November (+7%) and December (+7%). During the peak months July and August fewer visitors arrived from Finland compared to the previous year. During these months the overnight stay⁴ among Finnish visitors on ferries increased as occupancy rate in Tallinn's accommodation enterprises was very high. Presumably the number of visitors staying in accommodation enterprises decreased due to the lack of suitable accommodation places.

A positive trend is that trips by Finnish visitors continued to lengthen, since probably

³ Tallinn Foreign Visitors Survey 2011, http://www.tourism.tallinn.ee/static/files/083/tvk_2011_general_report_1.pdf

⁴ Tallinn's accommodation enterprises occupancy rate in July was 83% and August 78%, overnight stay on ferries among Finnish visitors increased in July by 31% http://www.stat.fi/til/smat/2011/07/smat_2011_07_2011-09-01_tie_001_en.html

they find pleasant activities for increasingly longer periods. According to the Tallinn Foreign Visitor Survey, the main activities of the Finnish visitors in Tallinn are shopping, walking around and visiting cafes or restaurants. During the last three years there has been an increase also in Finns going to pubs, night clubs, spas and beauty centres and among visitors to museums. Finnish visitors are highly satisfied with their stay in Tallinn (8.5 points out of 10) and many of them are planning to come back for another visit. The prognosis is that in the coming years the number visitors arriving from Finland won't change significantly as most visitors are repeat visitors who have been to Tallinn more than 10 times.



Source: Statistics Estonia

2011 was again a record year for the Russian market. **Russia** secured the second market position in terms of size, and compared to the previous year, the Russian market share rose by two percentage points. Russian tourists made up 11% of all the foreign tourists staying in accommodation enterprises. 142 700 Russian tourists stayed in Tallinn's accommodation enterprises in total with 301 400 bednights.

Tourist numbers from Russia increased significantly (2.3 times) since 2008 influenced by the visa regulations simplifications⁵, improved transport connections and interest towards Baltic holidays.

The growth in Russian tourist numbers continued significantly in 2011 (+39 500 tourists). The Highest percentage of growth was in April (+81%) and July (+72%), also during the other months tourist numbers grew. Most tourists from Russia arrived in January and December. In recent years the interest in summer holidays has grown and seasonality among Russian travellers has decreased.

The main influence on the growing number of visitors from Russia are the improved transport links. During the year flight connections were added to Moscow and St. Petersburg. In August simplified border crossing⁶ was introduced. 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 entertainment offers, party venues, restaurants and cafes. In 2011

⁵ Russians do not need Estonian visa after Estonia joined Schengen visa zone. It is sufficient to have visa of any Schengen visa zone country.

⁶ GoSwift information system was introduced in August for joint border crossing queue arrangements. Estonia-Russia border crossing can be pre-booked online for the suitable border crossing point.

Estonian cuisine was in focus of the campaign.

Germany, Great Britain and Sweden were all with 5% market share in Tallinn tourism.

During the year 73 000 **German** tourists visited Tallinn and spent in accommodation enterprises altogether 160 400 nights. Compared with 2010 the number of German visitors increased 27% and their bednights by 36%. Germans prefer to visit Tallinn in the summer period (from May to September). Not only tourist but also bednight numbers increased in each month and the growth percentage was in most months in double figures. The largest amount of Germans staying in Tallinn's accommodation enterprises was in July (altogether 14 500). The largest growth numbers were also in the summer months. According to Tallinn Foreign Visitors Survey, Germans travel to Tallinn primarily for holiday purposes. A large part (60%) of the tourist are first time visitors. As a general rule the German visitors remain satisfied with Tallinn (8.6 points out of 10) and praise for abundant sightseeing, rich cultural life, museums, restaurants, Tallinn's tourism information availability and good international transport links.

German visitors' trips were longer than the previous year (2.16 nights). The growth in the German market was supported not only by improved flight connections to Germany's big cities⁷ but also a growing interest in travelling to the Baltics. Trips by German visitors grew in 2011 also to other European cities⁸. German visitors' trips are significantly determined from flight connection and the growth is likely to continue next year.

Great Britain was the fastest growing Tallinn's target market. 2011 was also a record year for Great Britain's market. Great Britain's market was influenced most by improved flight connections with the addition of not only of airlines but also destinations in 2011. The low budget airlines (RyanAir, Easyjet) campaigns attracted visitors to Tallinn interested in short city breaks.

Altogether 64 400 Britons stayed in Tallinn's accommodation enterprise (+106%) with total of 160 600 bednights (+122%). Not only accommodation but also bednight numbers grew in each month and from May to October the growth percentage was in three digit numbers (120%-156%).

According to the Tallinn Foreign Visitors Survey, British visitors are in Tallinn for holiday trips, and they are mainly first time visitors. Satisfaction with trips to Tallinn is high (average rating is 8.8 points out of 10). Britons are willing to suggest Tallinn as a destination to friends and acquaintances. The British visitors value highly restaurants, the safety of the city, good international transport links, sightseeing and museums. Eight visitors out of ten are convinced that they will visit Tallinn again in the future.

The British market's further development depends to a large extend on budget airlines. Probably British visitor number will continue to grow in the future, but the percentage of growth will be smaller than in 2011.

Tallinn's primary market, **Sweden** (market share 5%), saw an increase in trips with accommodation and the growth percentages bigger than in 2010. Altogether, 64 000 Swedish visitors stayed in Tallinn's accommodation enterprises, an increase of 8% or 4 700 tourists. The same trend applied to bednights by Swedish citizens. Swedish visitors spent in total 110 300 bednights in Tallinn, an increase of 11 900 bednights or (+12%) compared to previous year. Observing the changes in visitor numbers month by month, there were fewer tourists from Sweden in February, July and August, but the rest of the months showed increase in numbers compared to 2010 (month by month increase between 1% and 23%).

⁷ Flights to Berlin, Munich, Frankfurt, Hamburg etc.

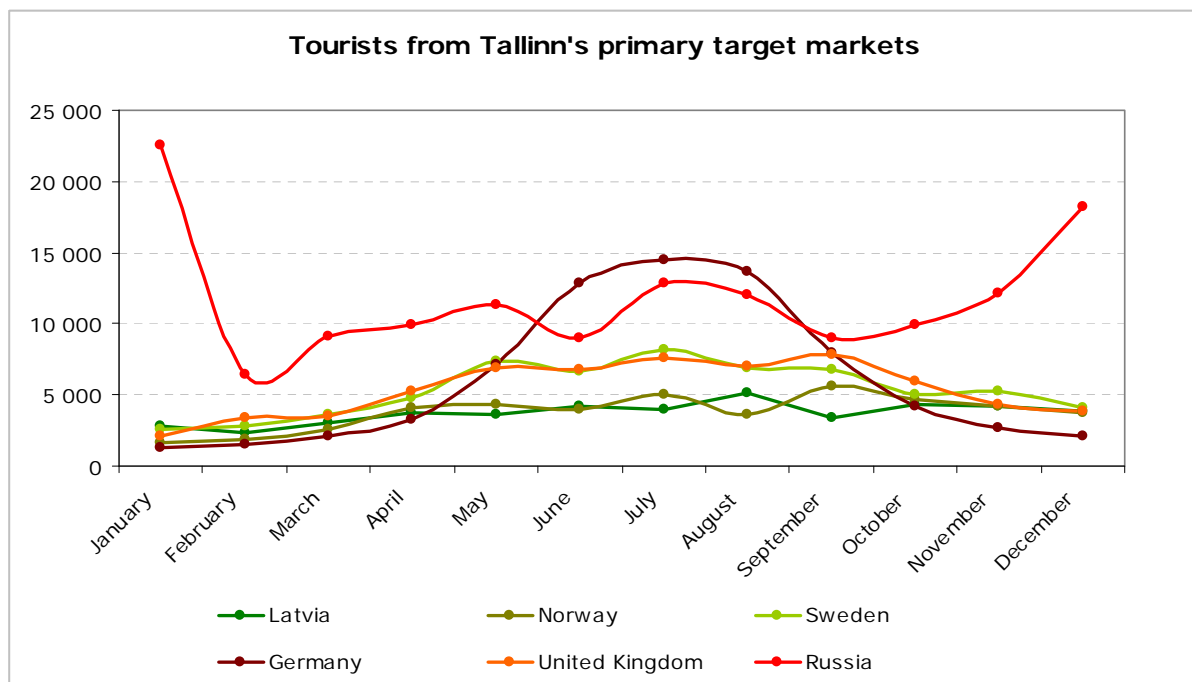
⁸ <http://www.tourmis.info>

Swedish visitors were in Tallinn for holiday breaks, entertained by shopping and visiting cafés or restaurants. Generally the evaluation given by Swedes to Tallinn was high, most praised was rich cultural life and the city's cleanliness. The overall impression of trips to Tallinn was similarly with Britons very good (8.8 points out of 10). Almost all visitors from Sweden are convinced that they will visit Tallinn again in the future and are ready to recommend Tallinn as a holiday destination to their friends.

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

In 2011 the Latvia economy grew, citizens' confidence in the economy increased and travel activity went up. The **Latvian** market had growth in numbers in 2011 and these numbers were a little higher than the previous year. Not only did Latvian tourist numbers increase (altogether 44 500 tourists), but also bednights increased by 18% (total 66 100 nights). Month by month basis Latvian tourists are divided fairly evenly. Tallinn Foreign Visitors Survey showed that there are significantly more visitors from Latvia visiting festivals and sports competitions in Estonia. The development of the Latvian market in following years depends on events organised in Tallinn but also on the confidence Latvian citizens have in their economy.

In summary, the number of visitors and bednights from **Norway** grew. The principle influence on this was improved flight connections (Ryanair, Estonian Air). Altogether 45 500 tourists arrived from Norway (+31%), who spent in Tallinn's accommodation enterprises 103 800 nights (+24%). According to the Tallinn Foreign Visitors Survey Norwegians travel mainly for holiday purposes, visiting cafés and restaurants, walking in the city, shopping and sightseeing. They are satisfied with Tallinn, appreciating most good international transport links, sightseeing, Tallinn's tourism information availability, restaurants and simple moving around. Almost all visitors from Norway are happy to recommend Tallinn as a destination to friends and relatives. Eight out of ten Norwegians are convinced that they will return to Tallinn. It is likely that Norwegian market will continue to grow.



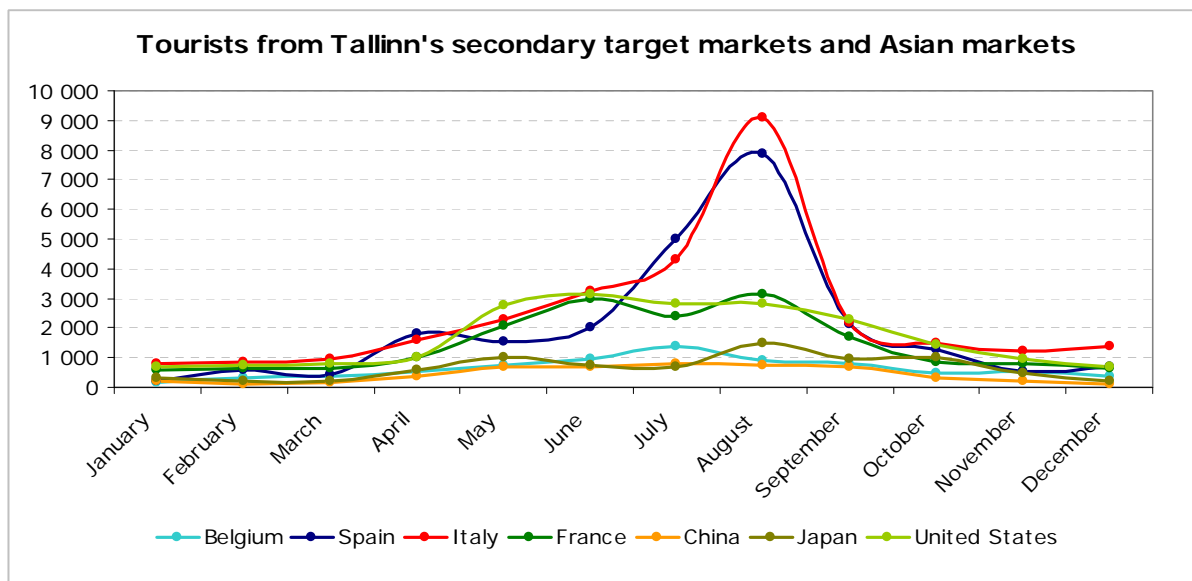
Source: Statistics Estonia

In 2011, results from secondary markets in Tallinn's tourism (Belgium, Spain, Italy, France, USA) as well as Asian markets showed growth numbers.

Visitors from **Spain** staying in accommodation enterprises and their bednights increased although the increase of accommodated (+64%) was remarkably bigger than the increase of bednights (+59%). Also increasing were the visitor numbers from **Italy** (+50%) and **France** (+16%). Trips by those countries' citizens are very seasonal and tend to take place in the summer months. Similarly to previous years many of the visitors from those countries arrived as cruise passengers. Numbers of **Belgian** tourists in Tallinn's accommodation increased by 50% and their bednights by 45%. Altogether, 7 600 visitors from Belgium stayed in accommodation for a total of 17 200 nights. Most likely the growth numbers are due to increased number of conferences held in Tallinn.

The **USA** market continued to grow. The number of tourist arriving from there increased 15% (+2 300 tourist) and their bednights increased by 14% (+5 500 nights). Altogether 20 000 tourists stayed in Tallinn's accommodation enterprises, with a total of 44 400 bednights. In comparison to previous year there were more American citizens among cruise passengers. Other European cities also had more tourists from USA in 2011. The prognosis shows increase in the demand of trips abroad among the USA tourists.

A third more tourists arrived from **Asia** (+33%) than in 2010, but their stays were shorter than in the previous year. The numbers of tourists from China grew the most (+98%, altogether 5 100 tourists) in 2011, and their bednights grew more or less similarly (+84%, totalling 8 600 bednights). More tourists also came from **Japan**, and their interest in travelling to Tallinn grew specifically in the summer months. The numbers of tourists in accommodation grew by 20% (a total of 7 900 tourists) and their bednights grew also 20% (a total of 14 200 nights).



Source: Statistics Estonia

Length of stay of tourists in Tallinn

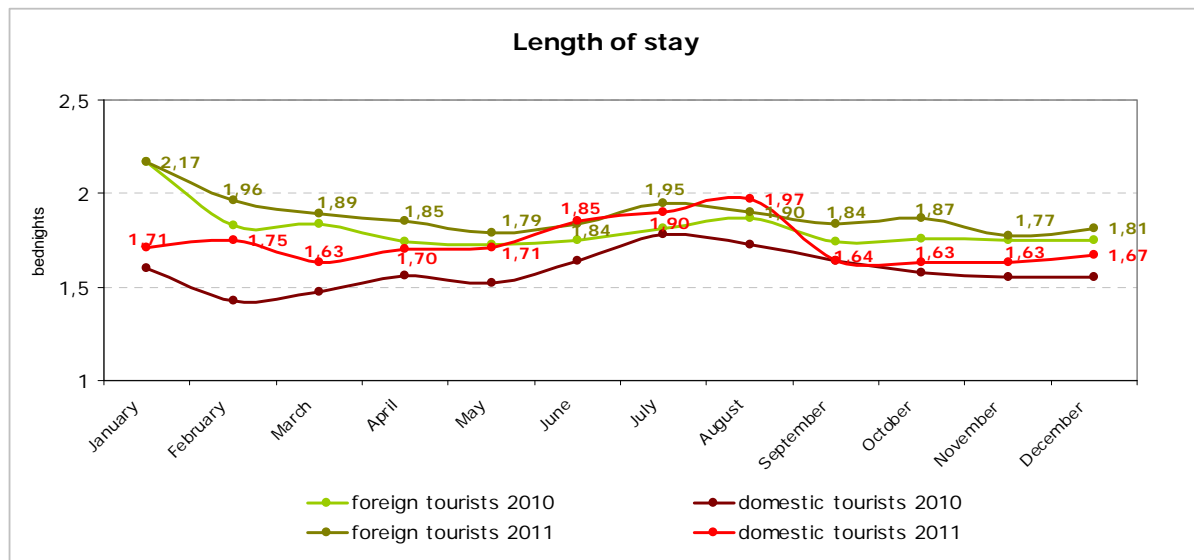
Changes in the length of stay to Tallinn month by month and by target markets can be followed only among those visitors to Tallinn who stay overnight in Tallinn's accommodation enterprises.

The average length of stay for tourists in Tallinn showed a growing trend in every month of the year. **The average length of stay for tourists in Tallinn in 2011 was 1.86 nights (+5%).** The longest stays were in January (2.11 nights) and the shortest in November (1.75 nights).

The **average length of stay of foreign visitors** in Tallinn's accommodation enterprises increased by 4%, from 1.80 to 1.88 nights. Trips by visitors from abroad were longest in

January (2.17 nights) and shortest in November (1.77 nights). Foreign visitors' trips were longer than average in January because of the long winter holidays by Russian tourists.

The average length of stay of domestic tourists increased more (8% or from 1.60 to 1.74 nights). The length of stay of domestic tourists increased in every month compared to the previous year. In the first half of the year the trips by Estonians lengthened, from September onwards the length of stay remained unchanged. The longest length of stay for domestic tourists was in July (1.97 nights) and the shortest was in October and November (1.63 nights).



Source: Statistics Estonia

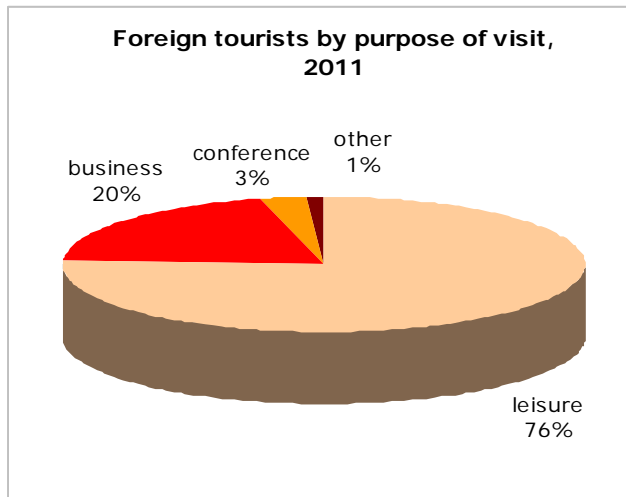
By **primary markets**, the longest stays in Tallinn in 2011 were spent by **British tourists** (2.49 nights), compared to 2010 their length of stay increased by eight percentage points. They were followed by **Norwegians**, whose average length of stay at 2.28 nights shortened (-5%). The shortest trips made in 2011 were by Latvian citizens (1.48 nights).

The longest visits were also among **Finnish tourists**, whose average length of stay this year was 1.61 nights (+2%), followed by **Swedes** (1.72 nights) and **Germans** (2.19 nights). **Russian** (2.11 nights) and **Latvian** (1.48 nights) visitors trips remained unchanged from the previous year. The biggest change month by month is among Russian tourists' trips as their winter trips are significantly longer (January 2.83 nights) than their summer city breaks (June 1.99 nights).

Purpose of visit

In 2011, the **1 498 500 tourists** who stayed in Tallinn's accommodation enterprises were divided according to their purpose of travel as follows: **74% leisure travellers (1 107 500)**, **22% business travellers (326 700)**, **3% conference participants (45 800)** and **1% visitors with other aims (studies, health, visiting friends or relatives)**.

Visitors with all of the travel purposes increased compared to the previous year (in total +209 100 tourists), but the share of different travelling purposes remained unchanged. In 2011, 144 000 (+15%) of more leisure travellers, 51 300 (+19%) business travellers and 8 200 (+22%) conference-goers stayed in Tallinn's accommodation enterprises. People travelling with other aims grew by 5 600 (+43%).

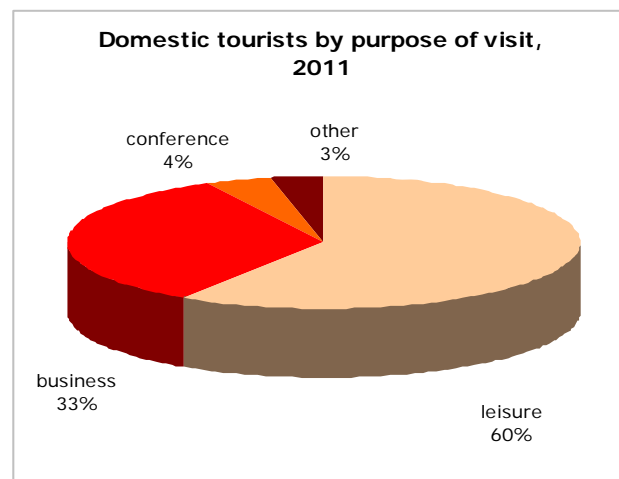


Most of the **foreign tourists** (76%) were for leisure purposes. 20% of foreign tourists' bednights in Tallinn were for business purposes and 1% attended conferences. Other purposes made up only 1% of foreign visitors' bednights in Tallinn's accommodation enterprises. In comparison with the previous year, there were larger numbers of foreign tourists travelling for leisure purposes +135%, for business purposes +22% (incl. conference participants +29%) and for other aims +42%.

Source: Statistics Estonia

Month by month percentage of tourists travelling for leisure purposes was largest in July (83% of all the foreign tourist holidays) and people travelling for business purposes in March, October and November (28% of all the trips).

Six out of every ten (60%) domestic tourists spent their trip in Tallinn for leisure purposes. Business trips accounted for 37% of the share (incl. 4% of conference attendance). 3% of the tourists in accommodation enterprises in Tallinn stayed a night for other purposes. Stays by domestic tourists in accommodation enterprises increased, but the changes of tourist numbers per purpose of stay varied. In comparison to 2010 leisure trips grew 14%, business trips 5% and trips with other aims by 44%. Conference trips were down by 7%.



Source: Statistics Estonia

Month by month the share of leisure trips was biggest in July (74% from all foreign tourist trips) and business trips share in November (48% from all trips).

Bednights (total 2 791 100 nights) of tourists staying in Tallinn's accommodation enterprises in 2011 were divided according to the purpose of travel as follows: leisure trips 73% (714 700), business trips 22% (612 900), conference trips 3% (86 100) and other purposes (studying, health, visiting friends and acquaintances) 2% (63 800).

In 2011 trips were longer (+5%), but by the purpose of the travel the changes of length of stay varied. Compared to last year leisure trips (1.83 nights, +5%), business trips and conference trips (both 1.88 nights) were longer. Length of trips with other purposes was 3.44 nights and they were shorter than the year before.

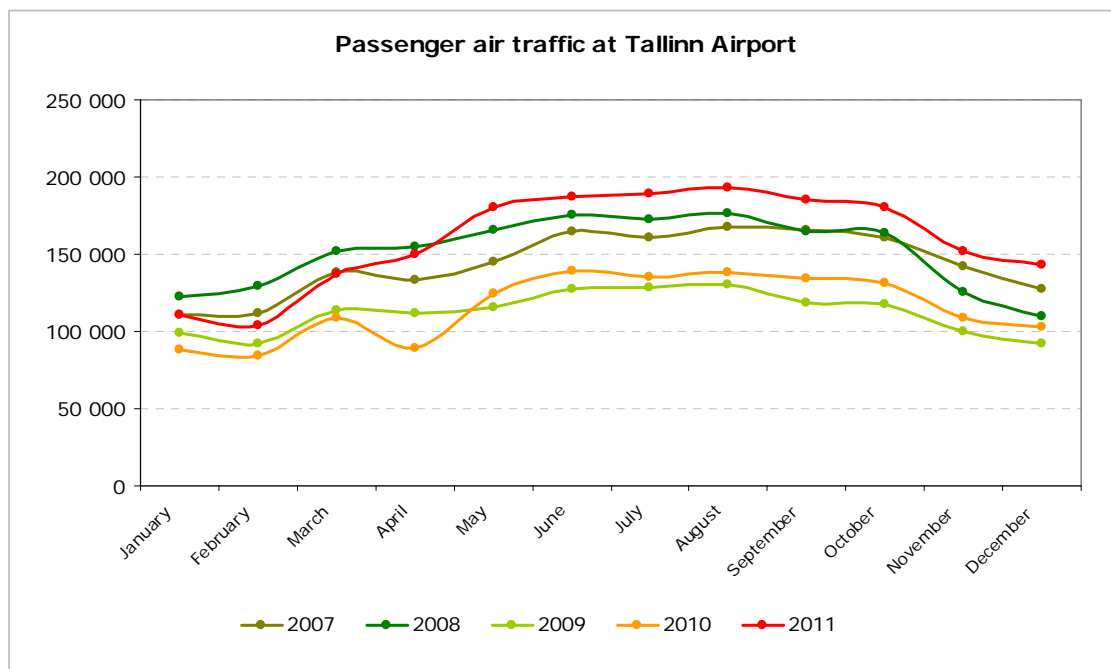
Travellers at Tallinn Lennart Meri Airport

A total of 1.91 million passengers (+38%) travelled through Tallinn Airport in 2011. Increase in passenger numbers was influenced by arrival of budget airlines to the market, increased number of direct flights and different destinations being added.

Passengers on international flights accounted for 99% of the travellers. Domestic flights increased during the year, but the proportion still remained small accounting for only 1%. 90% of the passengers flew on regular flights.

Analysing changes in passenger numbers month by month shows that the number of passengers grew most in April (69%). This was influenced by the big drop in April 2010, when the volcanic ash cloud stopped flight traffic. The growth percentage was big also during the tourism season (from May to September), when the growth was in most months 40%.

A study among passengers in Tallinn Airport in 2011 showed that 37% of passengers on regular flights were business travellers, 55% were leisure travellers and 8% were travelling for other purposes. This distribution is different to the year before as the leisure travellers share grew significantly in 2010. Half of the flight travellers are from Estonia (48%), followed by Great Britain (8%), Sweden (7%), Russia (6%) and Norway (4%). The remaining countries share accounted altogether for 27%.



Source: Tallinn Airport

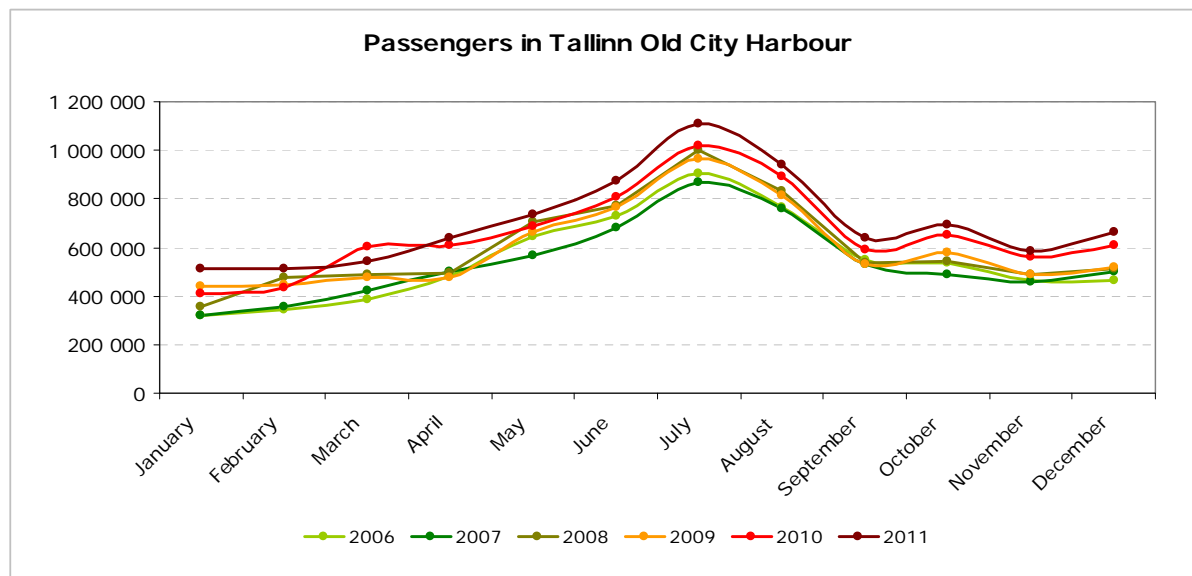
In comparison with 2010 the number of destinations and regular flights grew, initiating changes among the TOP destinations list. The most in demand flights from Tallinn Airport were to Helsinki (11% share of the total passenger number of regular flights), Riga (11%), London (9%) and Stockholm (9%). Similarly to last year Estonian Air served the most travellers (33% of travellers) in second place rose Ryanair (20% of travellers) who launched flight at the end of last year.

Passengers at the Tallinn Old City Harbour

In 2011 the number of passengers passing through Tallinn Old City Harbour grew by 7%. Altogether **8.45 million passengers were served in Tallinn Old City Harbour** and that set a new record in number of passengers in that harbour.

The largest portion of passengers in Tallinn Old City Harbour were travelling on the Tallinn-Helsinki line, making up 83% of all the passengers in 2011. A tenth (11%) of the passengers were travelling on Swedish line and 1% on the Russian line. The cruise passengers account for 5% of the share. In comparison to last year traveller numbers grew in all of the lines. The greatest number of passengers were served by Tallink (62%

of all passengers), followed by VikingLine (21%), EckeröLine (11%) and St. Peterline (1%).



Source: Port of Tallinn

Tallinn is the third most popular stop over place for cruise ships sailing the Baltic Sea region. In 2011, cruise ships made 368 calls to Copenhagen, 308 to St. Petersburg and 293 to Tallinn.

Tallinn received in total 438 000 cruise passengers, which made up 5% of all passengers travelling through Tallinn Old City Harbour. The number of cruise passengers grew by 12% compared to the previous year. The five first cruise ships' turnarounds⁹ took place in 2011.

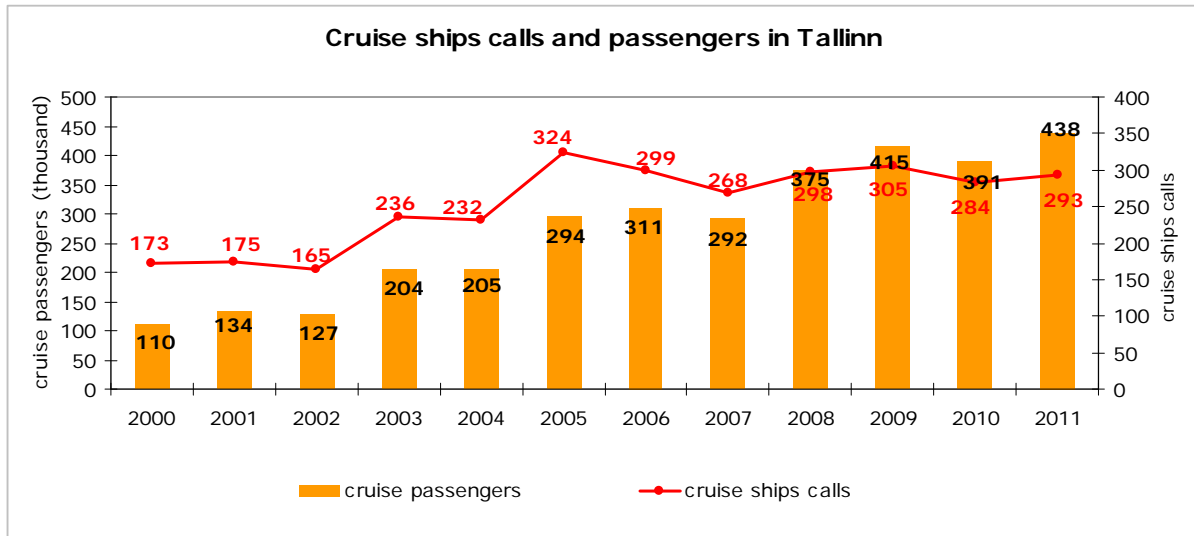
The greatest number of cruise ships calls was in July¹⁰, but the most cruise passengers arrived in August. Tallinn had its busiest day on July 13, when the port had six cruise ships over and close to 10 000 cruise passengers came to explore Tallinn. Tallinn received nine cruise ship calls more compared to 2010. The most visits (11) were made by the cruise ship Emerald Princess. Most passengers were brought at one time with cruise ship Costa Pacifica (altogether 3 380).

Most of the cruise passengers visiting Tallinn were from Germany 19%, followed by the USA 17%, Great Britain 15%, Spain 12%, Italy 6%, Russia 5% and the rest of the 26% from 145 different countries.

Cruise passengers' survey by Tallinn Port showed that the travellers were satisfied with their experiences in Tallinn (average rating of 8.7 points on a 10 point scale). Visitors regarded the Old Town (churches and the Town Wall), Town Hall Square, St. Nevsky Cathedral and upper Old Town Toompea as the most memorable places in Tallinn. On average, each cruise tourist spent 41 Euros during their time in Tallinn. Tallinn Port estimated ca. 17 million Euros in financial profit to the local enterprises from cruise passenger purchases. Tallinn Foreign Visitors Survey gave similar finding, where 16.4 million Euros of financial profit was estimated from cruise passengers' purchases to local enterprises.

⁹ Meaning that some of the crew and all of the passengers changed

¹⁰ <http://www.portoftallinn.com/static/files/27.Kruisihooaja-l6pp-03.11.2011.pdf>



Source: Port of Tallinn

Tallinn's revenue from tourism

Estonian export of tourism services¹¹ in 2011 according to Bank of Estonia totalled 1.2 billion Euros, of which 75% were travel services and 25% passenger transport.

Compared with 2010, the **export of travel services** (expenses related to foreign visitors stay in Estonia) grew by more than 11%, totalling 897 million Euros. **Export of passenger transport** (payments by foreign visitors to Estonian transportation companies) came to a total of 306 million Euros (+16%), included payments to ferry companies grew by +13% and to air companies +35%.

Considering the regional divide and the structure of the travel related expenditure of the foreign visitors, Tallinn's share of the revenue within the Estonian tourism export can be estimated at 85%. Compared with 2010, Tallinn's revenue from foreign tourism grew by a tenth and was estimated at 1.02 billion Euros.

Tallinn's **export of travel services** (foreign visitors' expenditure in Tallinn) grew by 11%, totalling **725 million Euros**. Tallinn Foreign Visitors Survey showed similar conclusions to the overall expenditure of the tourists in the city. Foreign visitors expenditure per day per person have grown, leaving estimated 705 million Euros in Tallinn in 2011 (incl. the cruise passengers).

According to the analysis of the Bank of Estonia¹² 46% of the foreign visitors expenditure in Estonia came from Finnish citizens. Russian visitors' total expenditure in the export of travel services was 11% and Swedish citizens 8%.

¹¹ Payments by foreign visitors to Estonian transportation companies and foreign visitors travel related expenditure in Estonia

¹² http://www.eestipank.info/pub/et/press/Press/pressiteated/pt2012/_03/pt0309.html?ok=1

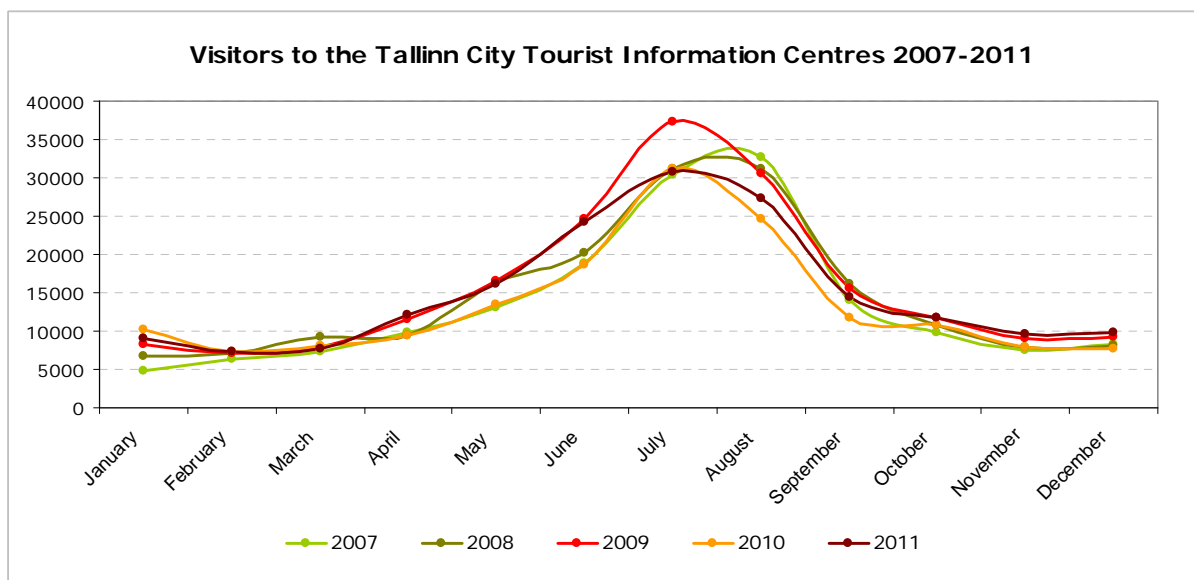


Source: Bank of Estonia

Visits to Tallinn Tourist Information Centres and tourism website

In 2011, Tallinn's two **Tourist Information Centres** (in the Old Town and Viru shopping centre) were visited by **a total of 180 400 visitors, of whom 91%, or 164 100 came from abroad and 9%, or 16 300 were from Estonia.**

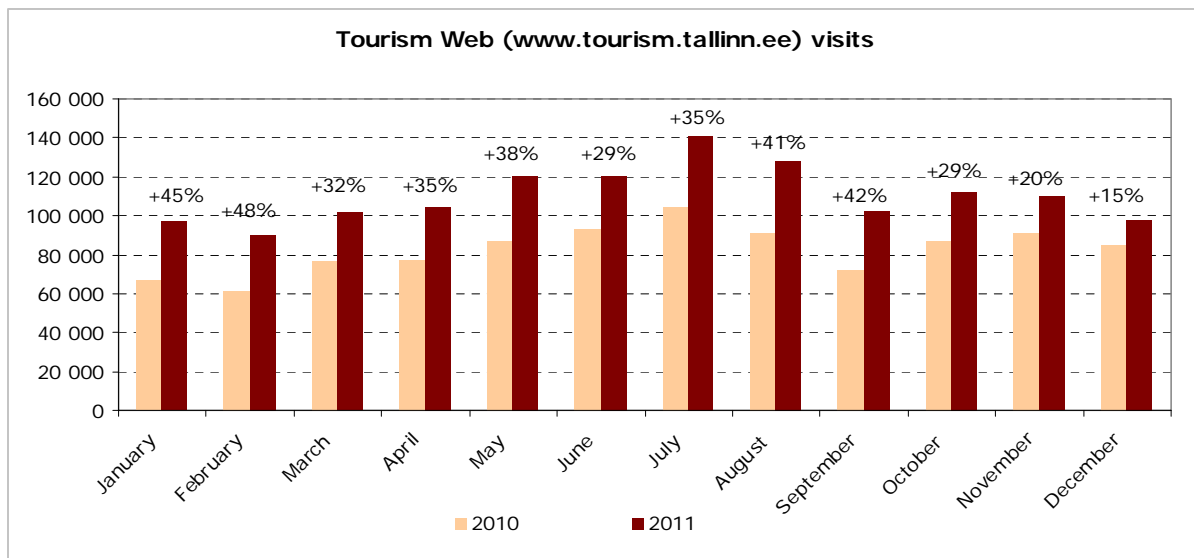
Compared to 2010, the number of visitors grew by 12%, or 19 400 visitors. Visitors came from 107 countries. Visitors from Finland (36 500) paid the greatest number of visits to the Tourist Information Centres, followed by Russians (22 000), Germans (21 200), Britons (17 900), Spanish visitors (13 900) and Swedes (11 000). Visitors from Latvia showed greatest growth (+95%) compared to the previous year. Visits by Britons (+76%) and Germans (+41%) also grew significantly.



Source: Tallinn City Tourist Office and Convention Bureau

A total of 178 300 queries came into the Tourist Information Centres in 2011. Trends from previous years continued: the numbers of queries presented in person at the information centres grew, while the numbers of queries sent by post, fax and email shrank. The most frequent topics of interest were transportation connections, city maps, excursions and shopping information. There was more interest in museums, sights and Tallinn Card product than earlier, but fewer queries about shopping and services.

The decline in queries coming in via post, fax and email is connected with more active use of the Tallinn's tourism website. The **Tourism Web (www.tourism.tallinn.ee) was visited 1 325 300 times in 2011 with in total 5.9 million page views**. The most frequently read topics included the city's sights (25 % of all the page views), entertainment and leisure information (16%), travel planning (16%), Tallinn Card information (8%). Rest of the 35% was divided between all other topics. In terms of different language environments, the most viewed was the English-language web site (43%), followed by Finnish (25%), Russian (15%), Estonian (7%), German (7%) and Swedish (6%). The Japanese and Chinese sites added in 2011 comprised 2% of the views.



Source: web-stat.com

Mobile application www.tallinn.mobi was visited close to 8000 times and over 39 000 pages of Tallinn's tourism information were browsed (4.9 pages per visit).

In 2011 the active promotion of Tallinn as a tourist destination in social media environments continued. Brand name VisitTallinn is used in social media channels. The VisitTallinn Facebook account attracted 12 740 fans by the end of the year, the Twitter account gained 1000 followers, and photos in the Flickr account were viewed close to 36 800 times. Tallinn's tourism videos in Youtube were viewed 16 000 times.

Tourists accommodated in Tallinn in 2011, number of nights spent and length of stay

Country of origin	No of accom- modated	Change 2010/2011		Bednight	Change 2010/2011		Length of stay
		No	%		No	%	
Albania	157	30	24	571	272	91	3,64
Austria	6 128	2 047	50	14 241	3 713	35	2,32
Belgium	7 572	2 597	52	17 215	5 337	45	2,27
Bulgaria	1 558	136	10	5 176	94	2	3,32
Spain	24 112	9 423	64	53 366	19 750	59	2,21
Holland	14 080	5 882	72	32 038	13 562	73	2,28
Croatia	1 155	515	80	2 124	780	58	1,84
Ireland	7 446	5 647	314	18 070	13 265	276	2,43
Island	873	227	35	2 174	502	30	2,49
Italy	29 388	9 800	50	70 711	23 112	49	2,41
Greece	2 439	-842	-26	5 164	-2 365	-31	2,12
Cyprus	418	34	9	1 194	-64	-5	2,86
Lithuania	32 394	9 127	39	53 198	15 526	41	1,64
Luxemburg	827	38	5	1 633	171	12	1,97
Latvia	44 505	6 791	18	66 071	9 954	18	1,48
Malta	219	2	1	547	100	22	2,50
Norway	45 454	10 696	31	103 767	20 418	24	2,28
Poland	22 155	6 444	41	39 204	10 435	36	1,77
Portugal	2 708	555	26	6 695	-125	-2	2,47
France	17 499	2 422	16	43 243	5 461	14	2,47
Sweden	63 981	4 734	8	110 349	11 899	12	1,72
Romania	1 998	878	78	4 541	1 919	73	2,27
Germany	73 208	15 381	27	160 368	42 168	36	2,19
Switzerland	7 046	1 443	26	14 405	3 471	32	2,04
Slovakia	1 210	-70	-5	3 523	349	11	2,91
Slovenia	986	242	33	2 463	891	57	2,50
Finland	595 453	-100	0	957 851	22 033	2	1,61
Great Britain	64 380	33 090	106	160 571	88 113	122	2,49

Country of origin	No of accom- modated	Change 2010/2011		Bednight	Change 2010/2011		Length of stay
		No	%		No	%	
Denmark	11 850	2 600	28	23 568	4 683	25	1,99
Czech Republic	4 274	1 029	32	9 647	2 305	31	2,26
Turkey	4 148	1 003	32	8 765	339	4	2,11
Ukraine	6 631	2 370	56	15 281	5 463	56	2,30
Hungary	3 009	810	37	8 424	1 446	21	2,80
Russia	142 666	39 515	38	301 408	84 222	39	2,11
Other European countries	25 431	4 570	22	49 773	11 742	31	1,96
African countries	1 868	840	82	3 867	1 463	61	2,07
Incl. Republic of South Africa	407	184	83	712	190	36	1,75
Asian countries	20 718	5 187	33	38 336	8 719	29	1,85
Incl. China	5 069	2 504	98	8 498	3 892	84	1,68
Incl. Japan	7 917	1 292	20	14 243	2 342	20	1,80
Incl. South Korea	2 195	328	18	3 361	375	13	1,53
Ameerika United States of America	20 043	2 591	15	44 423	5 504	14	2,22
Canada	3 404	810	31	7 896	2 035	35	2,32
South and Central American Countries	4 122	884	27	8 962	1 776	25	2,17
Incl. Brazil	1 911	71	4	4 088	76	2	2,14
Australia, Oceania	5 461	1 696	45	12 284	3 466	39	2,25
Incl. Australia	4 820	1 619	51	10 651	3 144	42	2,21
Other countries	10 787	992	10	21 620	4 977	30	2,00
Total foreign tourists	1 333 761	192 066	17	2 504 727	448 881	22	1,88
Total Estonian residents	164 701	17 024	12	286 367	50 702	22	1,74
Grand total	1 498 462	209 090	16	2 791 094	499 583	22	1,86

Source: Statistics Estonia

Accommodation statistics of Helsinki, Riga and Vilnius¹³

	Riga	Vilnius	Helsinki
Number of tourists in total	943 671	683 113	1 956 271
Number of foreign tourists	823 698	562 483	932 113
Number of domestic tourists	119 973	120 630	1 024 158
Total number of bednights	1 955 692	1 364 891	3 366 564
Number of foreign tourists bednights	1 649 776	1 054 562	1 823 056
Number of domestic tourists bednights	305 916	310 329	1 543 508
Average length of stay	2.07 nights	2.00 nights	1.72 nights

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

¹³ Visitors staying at accommodation enterprises, sources: Statistics Latvia and Lithuania,
<http://www.tourmis.info>