

# Inbound Tourism to Tallinn 2005

## Number of trips

In 2005, foreign tourists made 1.212 million trips to Tallinn. This represents an increase of 42,000 visits, or 3.6%, compared to 2004.

## Tourists by country of residence

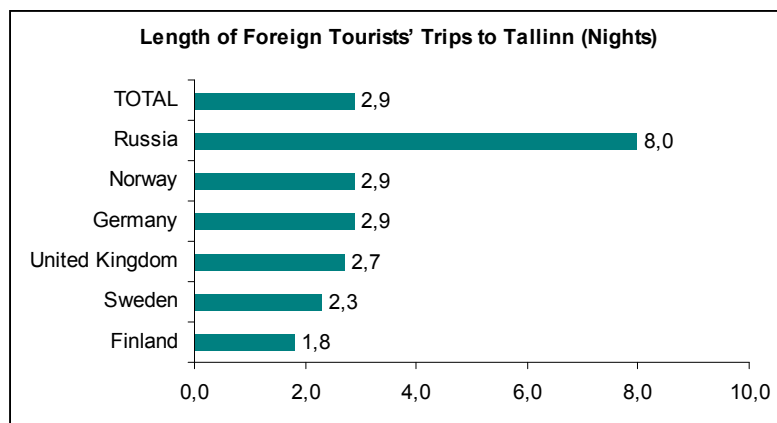
Numbers of trips increased in all target markets except Finland. Therefore, the proportion of overnight visits by Finns dropped to less than half (47%) of the total of overnight visits for the first time. The largest growth was in the number of tourists from the UK, followed by Germany. The numbers of overnight visitors from Russia and Sweden also showed large increases.

	<i>Country of residence</i>	<i>Overnight trips, 2005</i>	<i>Percentage of all foreign overnight trips, 2005</i>	<i>Change 2004/2005 Total / %</i>
1.	Finland	565,000	47%	-70,000 / -11%
2.	Germany	86,000	7%	+20,000 / +47%
3.	Sweden	83,000	7%	+14,000 / +25%
4.	Russia	78,000	6%	+15,000 / +24%
5.	United Kingdom	62,000	5%	+23,000 / +30%
6.	Norway	35,000	3%	+7,000 / +26%

Source: Statistical Office of Estonia, Tallinn Foreign Visitors' Survey 2005

## Average length of stay

The average length of stay in Tallinn showed no significant change. Foreign tourists stayed in Tallinn for an average of 2.9 nights. Finns continued to spend the shortest length of time per visit (1.8 nights) and Russians the longest (8 nights). The latter have somewhat increased the duration of their visits. Visits from the other main target markets – Germany, Norway, the UK, and Sweden – have slightly shortened compared to previous years.



Source: Tallinn Foreign Visitors' Survey 2005

## Purpose of trip

Most visitors come to Tallinn on vacation. The number of overnight vacation trips has grown by 50% over the last three years. The past year also saw a substantial increase in visitors coming to Tallinn for shopping or business trips. Numbers of visits for the purpose of visiting friends or relatives showed a slight decrease.

Among one-day visitors, numbers have increased primarily among visitors on shopping trips, followed by those coming on vacation to visit friends and relatives.

## Accommodation facilities in Tallinn

As of December 31, 2005, 301 accommodation establishments were active in Tallinn, of which 46 were hotels. The number of accommodation establishments increased by 54 over the past year, while accommodation capacity grew by 16% or 1,471 beds. Although overnight stays grew by one percent less than accommodation capacity, the rate of occupancy was higher than before. This was due to the fact that 3 hotels began operations in the second half of the year, one of them at the end of December. Fewer new accommodation establishments were opened in 2005 than in 2004.

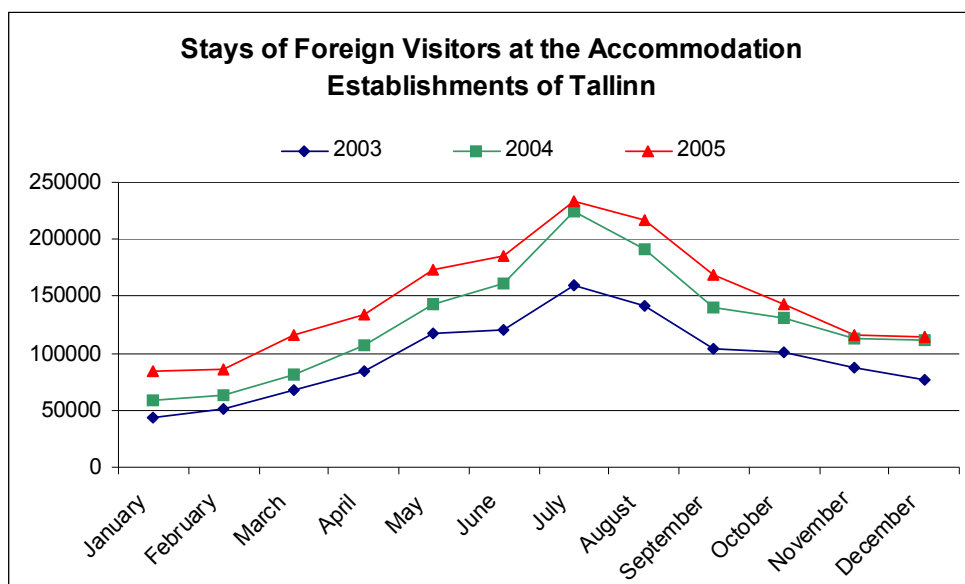
	2003	2004	2005	<i>Change 2004/2005</i>		
				<i>Total</i>	<i>/</i>	<i>%</i>
Number of accommodation facilities	148	247	301	+54	/	+22%
Number of hotels	37	43	46	+3	/	+7%
Number of rooms in accommodation facilities	4,145	5,060	5,668	+608	/	+12%
Room occupancy rate	58%	58%	60%			+2%
Number of beds in accommodation facilities	7,835	9,474	10,945	+1,471	/	+16%
Bed occupancy rate	49%	49%	52%			+3%
Sale of accommodation services to foreign tourists (euros)	45 mill.	60 mill.	69 mill.	+9	/	+15%

Source: Tallinn City Tourist Office & Convention Bureau, Statistical Office of Estonia

## Foreign tourists in accommodation facilities in Tallinn

85% of foreign tourists visiting Tallinn stayed in paid accommodation establishments. Free accommodation, usually with friends and relatives, was used by half of the visitors from Russia and Latvia, while visitors from other countries preferred to stay at hotels and other paid accommodation. In 2005, 1.03 million foreign tourists stayed in Tallinn's accommodation facilities (a growth of 7% or 71,000 visitors), totalling 1.77 million nights (an increase of 16% or 242,000 nights). The length of time spent by foreign tourists at accommodation establishments increased in the last year to an average of 1.7 nights. Residents of the United Kingdom, Ireland and Canada stayed for the longest average lengths of time in accommodation establishments (2.5-2.6 nights), while residents of Finland, Latvia and Lithuania generally stayed for the shortest period of time (1.4-1.6 nights).

In the last year, the sharp difference between peak and off-season periods has abated. In earlier years, nearly four times as many nights were spent in accommodation in the peak month as the quietest month, while now the difference was only a factor of 2.8. This development has been boosted by the rapid growth in numbers of Russian tourists during the New Year period, the growth in numbers of winter trips taken by Britts, and the increasing readiness on the part of Finns to visit Tallinn during the winter.



Source: Statistical Office of Estonia

## Cruises

In 2005, 65 cruise ships made a total of 324 calls (including 51 overnight cruise calls) to Tallinn, with a total of 295,000 passengers. The number of cruise ship calls was 40% bigger than in 2004, when cruise ships made 232 calls to Tallinn. The number of passengers increased by 44% compared to a year earlier. 51 overnight cruise ships brought 46,000 passengers to Tallinn.

Altogether, Tallinn was the 3<sup>rd</sup> most popular destination in numbers of cruise passengers on the Baltic Sea, after St. Petersburg and Copenhagen-Malmö (sister cities who combine their statistics).

	2001	2002	2003	2004	2005	Change 2001-2005, numerical	Change 2004/2005 %
No. of cruise ship calls	175	165	235	232	324	+149	+40
No. of cruise passengers	134,000	127,000	204,000	205,000	295,000	+161,000	+44

Source: Port of Tallinn

## Travel behaviour of foreign visitors

In 2005, 42% of foreign visitors to Tallinn were aged 55 years or older. The average age of foreign visitors has slightly increased over the years. Older visitors generally

originate from Finland, Sweden and Germany, while younger people come mainly from the United Kingdom and Russia. Seniors prevail among one-day visitors, while there are more middle-aged and younger visitors among those who stay overnight. Tallinn is increasingly becoming a city-break destination. While over the last three years, numbers of tourists visiting other places alongside Tallinn increased, the past year saw a growth of visitors for whom Tallinn was the only destination on the trip (78% of all visitors). This tendency was not limited to one-day visitors, but also included overnight tourists. 6% of visitors to Tallinn also visit other countries during their trip, mainly Finland and Latvia, and the same amount spend the night in other places in Estonia in addition to Tallinn.

Half of Tallinn's one-day visitors spend the night on board ships. Visitors spending the night in Tallinn prefer mid-range hotels. This includes Finns, who often used to spend the night on board ships, but now increasingly prefer to stay at mid-range hotels.

The farther the visitors are travelling from, the earlier they plan their journey. Since the percentage of visitors from more distant countries has grown year after year, booking times have also become considerably longer. While most travellers book accommodation up to one month prior to their arrival, bookings of 5-8 weeks and even over two months prior to arrival are rapidly increasing.

Alongside an increase in the proportion of long-distance visitors, the numbers of first-time visitors also increased, constituting over half (52%) of non-Finnish foreign visitors. Among Finns, the first-time visitor rate remains at just 3%.

Most of the foreign visitors to Tallinn spend their time on four activities: shopping, walking around the city, visiting pubs and restaurants, and sightseeing. Non-Finnish visitors usually have a much broader range of interests than Finns, who are generally regular visitors to Tallinn. Non-Finnish tourists tend to be more interested in sightseeing, as well as visiting nightclubs, attending conferences or attending to other business-related matters. Tourists from Russia and Germany tend to be the most culture-oriented of all Tallinn's visitors.

## Evaluations

Visitors from all countries have increased their rating of trips to Tallinn, giving an average of 8.3 points out of 10. The opinion of Swedes, who have been the most critical, has improved the most. Of all tourists, Russians rate their visits to Tallinn most highly (8.7 points), while Norwegians and Swedes give the lowest scores (7.9 and 8.0 points).

The likelihood of returning to Tallinn has not changed within the last year, remaining greatest in the case of Finns (98%) who have been here repeatedly and lowest among German tourists (60%).

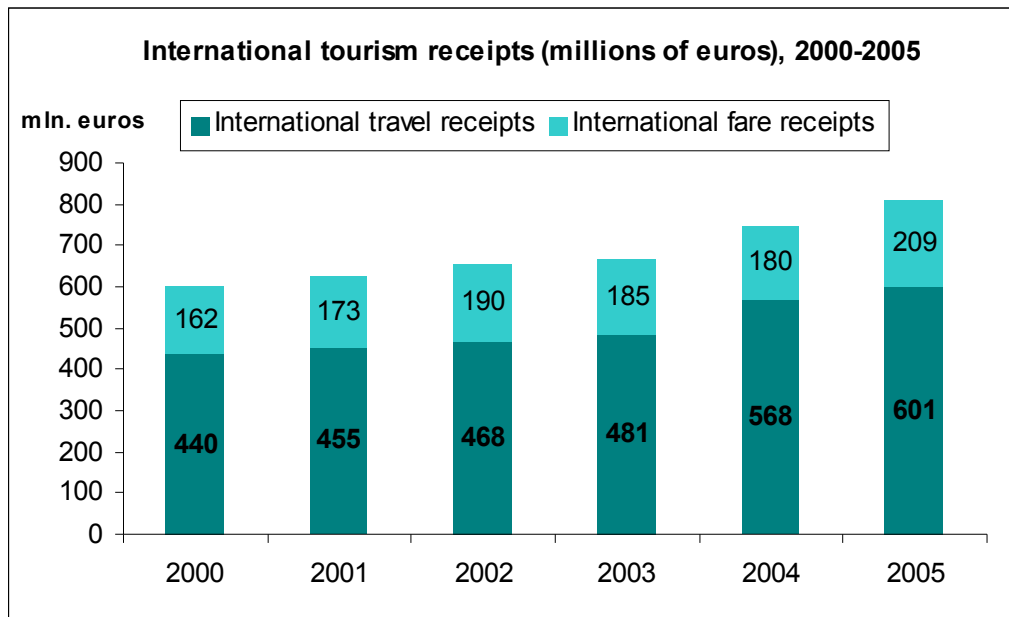
## Foreign visitors' expenditures and Tallinn's revenue from tourism

In 2005, foreign visitors spent an average of 145 euros per person per day in Tallinn, up by 9 euros (7%) from 2004. While one-day visitors previously spent a bit more than overnight visitors, due to larger amounts of shopping, in 2005 they spent equal amounts of money. Visitors staying in paid accommodation spent more (142 euros per day) than visitors whose lodging was free (85 euros per day).

The largest expenditures are on shopping, due to Finnish visitors, followed by spending on accommodation. The greatest increase in the last year was shown in spending on food and drink (+72%), followed by entertainment (+47%) and other goods and services (+41%). Spending on accommodation has increased more slowly than average.

In 2005, Norwegians and Swedes spent the most money per day, and visitors from southern neighbouring countries – Latvia and Lithuania – spent the least. Since Russians stay in Tallinn for the longest length of time, they also spend the most per trip, followed by British and Norwegian visitors.

In 2005, Tallinn’s international travel receipts (i.e. all travel-related expenditures of foreign visitors in Tallinn, including accommodation, dining, entertainment and shopping) amounted to 601 million euros (a growth of 33 million euros, or +7%). International fare receipts of Estonian ship, bus, and airline companies amounted to 209 million euros. As all of the major Estonian companies offering international transport services are situated in Tallinn, Tallinn’s international tourism receipts in 2005 can be estimated at 810 million euros.



Source: Bank of Estonia

## Numbers of tourists and nights spent in accommodation facilities in Tallinn 2004-2005

	tourists		change		nights spent		change	
	2004	2005	numerical	%	2004	2005	numerical	%
<b>TOTAL</b>	1062579	1130570	67991	6	1688857	1938045	249188	15
<b>Estonia</b>	105153	101787	-3366	-3	162671	170056	7385	5
<b>Total, foreign countries</b>	957426	1028783	71357	7	1526186	1767989	241803	16
<b>Albania, Bulgaria, Romania</b>	880	1394	514	58	2245	3438	1193	53
<b>Austria</b>	4048	7604	3556	88	7738	19542	11804	153
<b>Belgium</b>	3145	3971	826	26	6724	8339	1615	24
<b>Spain</b>	10638	13538	2900	27	18323	25375	7052	38
<b>Holland</b>	7228	8908	1680	23	15944	19118	3174	20
<b>Ireland</b>	2491	4102	1611	65	5860	10608	4748	81
<b>Iceland</b>	735	1889	1154	157	1578	5455	3877	246
<b>Italy</b>	22013	22905	892	4	46374	52675	6301	14
<b>Greece</b>	1369	1487	118	9	2680	4020	1340	50
<b>Lithuania</b>	14032	17091	3059	22	21735	27708	5973	27
<b>Luxembourg</b>	305	455	150	49	678	1070	392	58
<b>Latvia</b>	22864	27671	4807	21	34490	40453	5963	17
<b>Norway</b>	29144	31913	2769	10	64043	74765	10722	17
<b>Poland</b>	8505	11003	2498	29	14384	20503	6119	43
<b>Portugal</b>	2450	3262	812	33	4358	6354	1996	46
<b>France</b>	11466	12985	1519	13	22720	27279	4559	20
<b>Sweden</b>	58868	73226	14358	24	95068	131639	36571	38
<b>Germany</b>	56429	76193	19764	35	111459	155048	43589	39
<b>Slovakia</b>	400	1032	632	158	785	2903	2118	270
<b>Slovenia</b>	505	1042	537	106	893	2175	1282	144
<b>Finland</b>	571308	542343	-28965	-5	762875	746173	-16702	-2
<b>United Kingdom</b>	33903	56543	22640	67	85461	147116	61655	72
<b>Switzerland</b>	3197	3874	677	21	6428	8069	1641	26
<b>Denmark</b>	9370	10731	1361	15	19045	22166	3121	16
<b>Czech Republic</b>	3118	3430	312	10	5017	5904	887	18
<b>Turkey</b>	441	439	-2	0	1016	997	-19	-2
<b>Hungary</b>	1788	2950	1162	65	3804	7001	3197	84
<b>Russia</b>	32352	40200	7848	24	68779	92453	23674	34
<b>Other European countries</b>	7680	8942	1262	16	15101	17542	2441	16
<b>African countries</b>	525	909	384	73	1111	2114	1003	90
<b>Asian countries</b>	9611	10264	653	7	18291	19904	1613	9
<b>of which Japan</b>	6879	7238	359	5	13370	14095	725	5
<b>United States of America</b>	15812	16710	898	6	36429	37665	1236	3
<b>Canada</b>	1878	2333	455	24	5160	5915	755	15
<b>South and Central America</b>	995	1183	188	19	2053	2370	317	15
<b>Australia, Oceania</b>	2327	2895	568	24	5001	6458	1457	29
<b>of which Australia</b>	1851	2499	648	35	4041	5631	1590	39
<b>of which New Zealand</b>	262	0	-262	-100	529	0	-529	-100
<b>Other countries</b>	2331	5606	3275	140	4892	7675	2783	57