

TOURISM IN TALLINN JUNE 2011

In June 2011, 294,300 tourists stayed in Estonian accommodation establishments, 53% of whom stayed in Tallinn.

Arrivals in Tallinn: 156,100 (+23%)*
Bednights in Tallinn: 286,800 (+30%)

- **Foreign tourists: 141,600 (+22%)**
Bednights of foreign tourists: 260,000 (+28%)
- **Domestic tourists: 14,500 (+36%)**
Bednights of domestic tourists: 26,800 (+52%)

Tallinn attracts more foreign tourists

Finland: 89,100 nights (+7%)
Germany: 26,700 nights (+47%)
Russia: 18,100 nights (+46%)
Great Britain: 16,700 nights (+141%)
Sweden: 11,300 nights (+26%)
Norway: 9,100 nights (+29%)
Latvia: 6,000 nights (+7%)

USA: 7,400 nights (+3%)
Italy: 7,400 nights (+105%)
France: 6,100 nights (+59%)
Spain: 4,100 nights (+22%)
Belgium: 2,100 nights (+61%)
Japan: 1,400 nights (-37%)
China: 1,100 nights (+88%)

Leisure travel continue to rise

77% of **foreign tourists** stay in Tallinn for leisure purposes, 22% for business (incl. 3% a conference travel) and 1% visits for other purposes.

67% of **domestic tourists** visit for leisure 28% for business purposes, 3% for attending conferences and 2% for other purposes.

* comparison June 2010, %

Rise in length of stay

The average length of stay for tourists was **1.84 nights (+6%)**.

Stays by domestic tourists: 1.85 nights (+12%), foreign tourists: 1.84 nights (+4%). Among primary markets, British tourists spent the longest time (2.46 nights), and Latvians spent the shortest time (1.44 nights).

Room occupancy rates up and average price of bednights** increased

349 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 75%, 14 percentage points higher than in June of the previous year.

The average cost of a bednight in an accommodation establishment was 34 Euros (+2€ or +6%).

Travelers by air and by sea increased

186,945 passengers passed through **Tallinn Airport** in June (+34%).

Passengers in **Tallinn Old City Harbour** totalled **875 400 (+8%)**, of whom 78% travelled on the Tallinn-Helsinki line, 11% on the Tallinn-Stockholm line and 12% being cruise passengers. 78 cruise ships and **101 322 cruise passengers** visited Tallinn in June. The first cruise ship turnaround took place in Tallinn.

Visits of Tallinn Tourist Information Centres increased

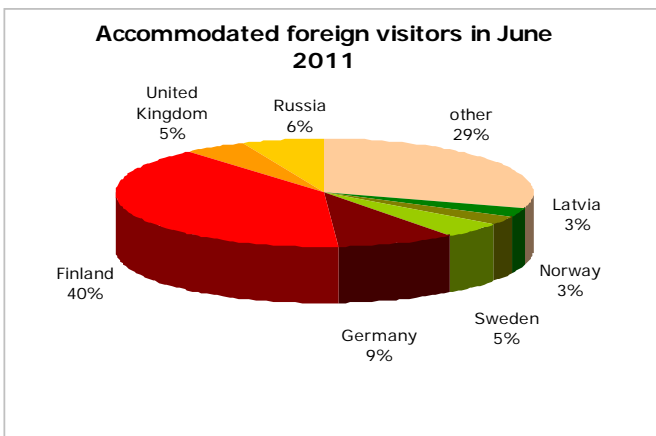
Tallinn Tourist Information Centres served **24 300 visitors (+31%)**. Foreign visitors originated mostly from Finland (4 399), Germany (4 327) and Great Britain (2 449).

** Average cost of a bednight — the average cost of one guest night in all types of accommodation establishment, includes value-added tax and the cost of breakfast if it is sold with accommodation services.

Tourists staying in Tallinn’s accommodation establishments

In June, tourist arrivals have raised revenues for hotels, transport companies, restaurants, pubs, souvenir stores and all of the other businesses that depend on tourism in Tallinn.

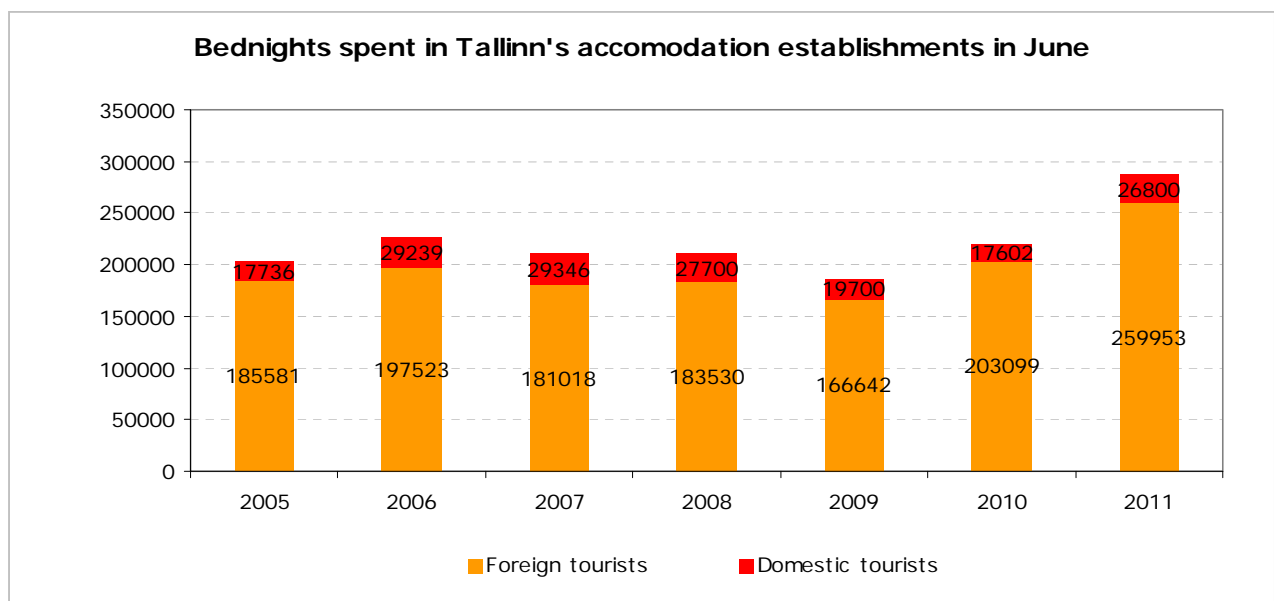
A total of 156,100 tourists stayed in Tallinn’s accommodation establishments (23% more tourists compared with same month in 2010). Altogether a total of 141,600 foreign tourists used the services of accommodation establishments (+22% or 25,300 tourists). The number of domestic tourists rose even more, numbers accommodated increased 36%, by 3 800 tourists, for a total of 14,500.



Most of (91%) accommodated visitors were foreign tourists.

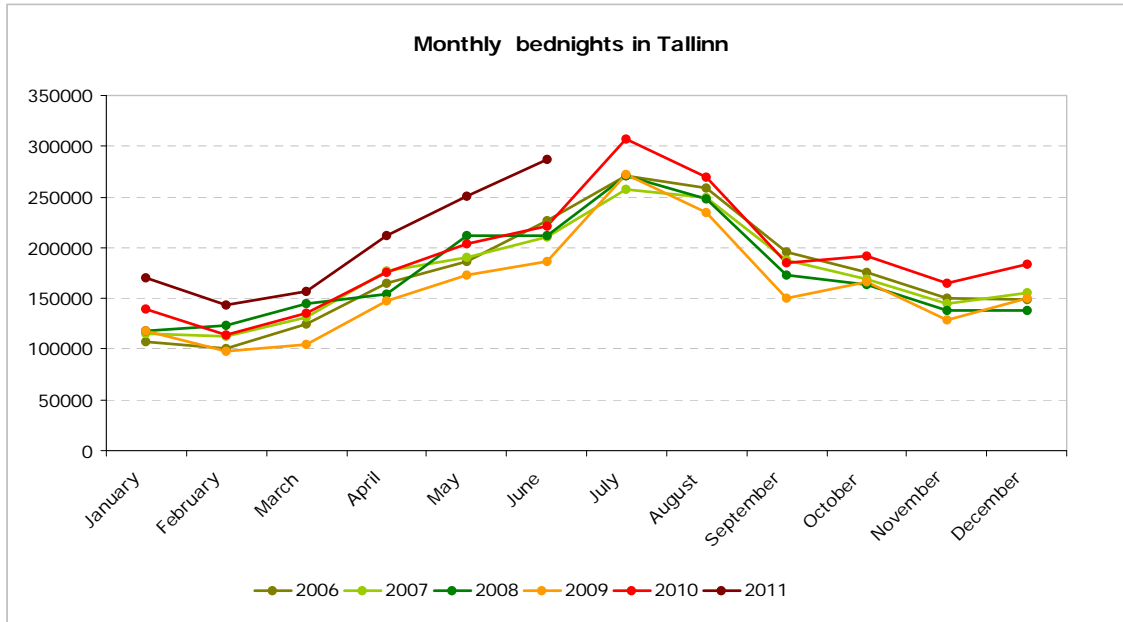
The highest number of foreign visitors arrives from Finland (56,700), Germany (12 800) and Russia (9,100). Most increased number of visitors from Great Britain (+3,800 tourists), and the fastest growth (+123%) was also on the UK market.

Bednights spent by tourists also rose, with a total of 286,800 bednights (+30%) spent in Tallinn’s accommodation establishments. While bednights by foreign tourists increased by 28% (totalling 260,000 bednights) and bednights by Estonian residents were up 52% (total 26,800 bednights).

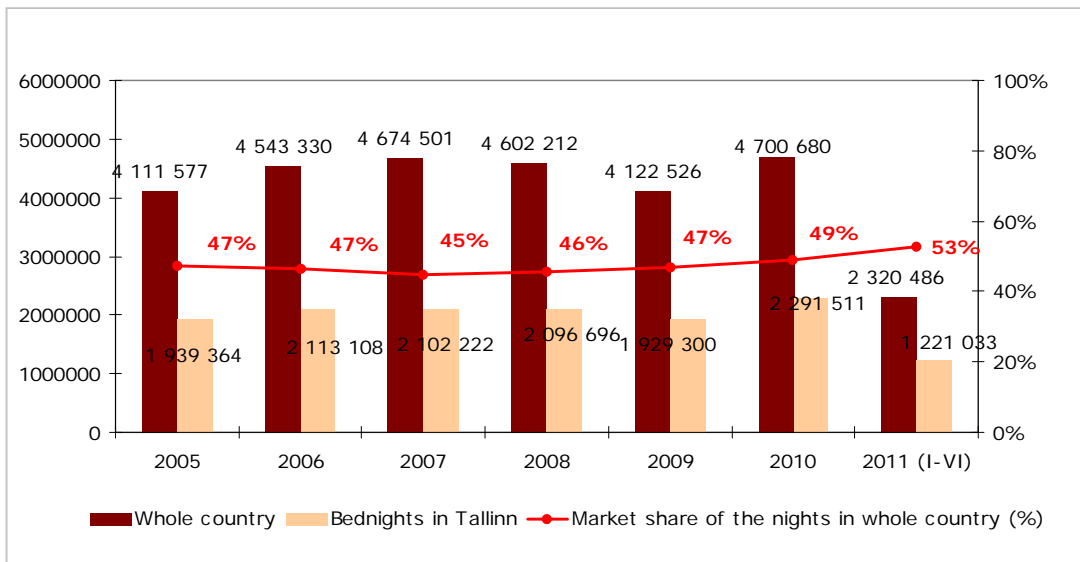


Source: Statistics Estonia

Monthly bednights in Tallinn



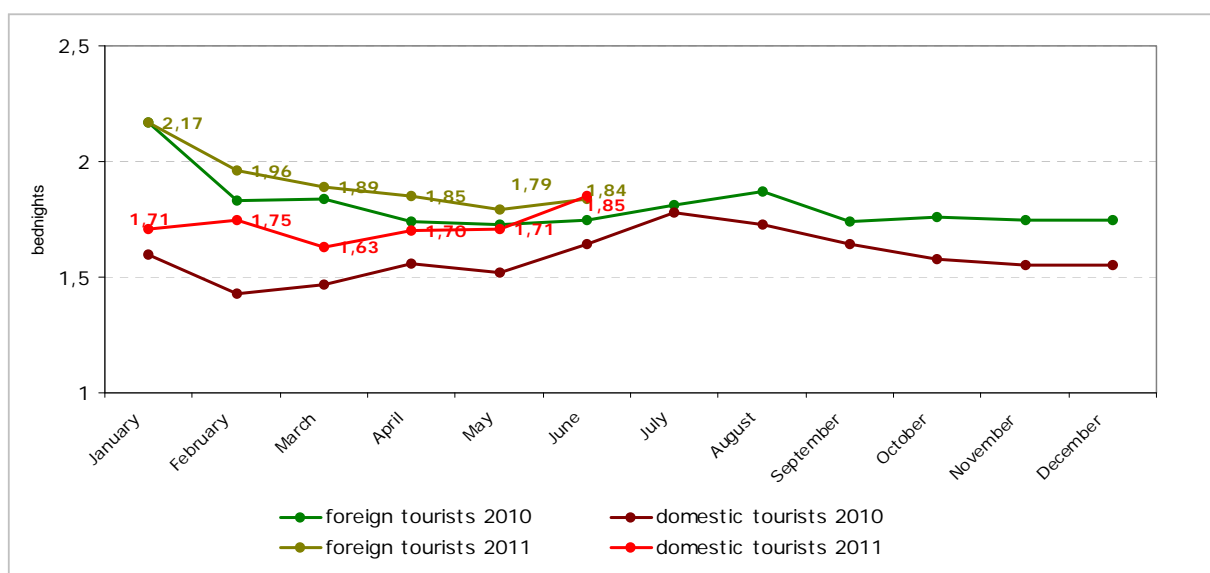
Total bednights in Tallinn and market share of the bednights in Estonia



Source: Statistics Estonia

	Bednights in Tallinn	Market share of the nights in whole country	Change absolute numbers from previous year	Change (%) from previous years
2004	1 688 857	45 %	409 679	32%
2005	1 939 364	47 %	250 507	15%
2006	2 113 108	47 %	173 744	9%
2007	2 102 222	45 %	-10 886	-1%
2008	2 096 696	46 %	-5 526	0%
2009	1 929 300	47%	-167 396	-8%
2010	2 291 511	49%	+362 211	+19%
2011 (January-June)	1 221 033	53%	+231 853	+23%

Excluding day traveller, visitors spent an average of 1.84 nights in June (+6%). The average trip length among domestic tourists rose by 12%, from 1.64 to 1.85 nights. The length of stay for foreign tourists was 1.84 nights (+5%). In June among Tallinn's primary markets, British tourists spent the longest time (2.46 nights) and Latvians spent the shortest time (1.44 nights).



Source: Statistics Estonia

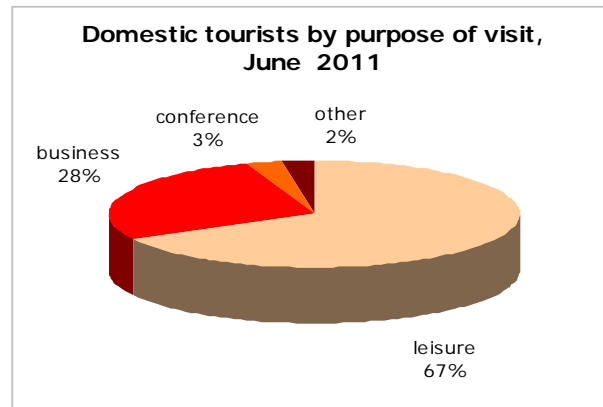
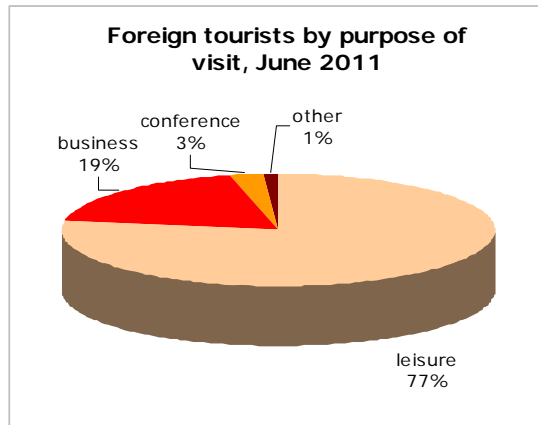
Arrivals, numbers of bednights and length of stay in June 2011

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of Stay
		Number	%		Number	%	
Albania	5	-2	-29	18	-7	-28	3,60
Austria	1 335	678	103	2 739	1 462	114	2,05
Belgium	955	346	57	2 087	791	61	2,19
Bulgaria	187	73	64	494	290	142	2,64
Croatia	142	67	89	261	23	10	1,84
Czech Republic	462	210	83	881	314	55	1,91
Cyprus	44	-29	-40	118	-95	-45	2,68
Denmark	1324	209	19	2 660	605	29	2,01
Finland	56 650	3 141	6	89 131	5 962	7	1,57
France	2 977	317	12	6 089	595	11	2,05
Germany	12 780	3 045	31	26 708	8 552	47	2,09
Greece	195	-14	-7	392	-247	-39	2,01
Hungary	386	92	31	791	21	3	2,05
Iceland	37	-71	-66	63	-176	-74	1,70
Ireland	535	278	108	1 456	795	120	2,72
Italy	3 224	1 610	100	7 368	3 766	105	2,29
Latvia	4 169	638	18	6 010	395	7	1,44
Lithuania	4 242	1 347	47	6 738	1 966	41	1,59
Luxembourg	82	-15	-15	209	38	22	2,55
Malta	26	-2	-7	60	3	5	2,31
Netherlands	1 609	588	58	3 578	1 314	58	2,22
Norway	3 972	838	27	9 089	2 021	29	2,29
Poland	6 349	1 862	41	9 665	2 676	38	1,52
Portugal	364	29	9	745	3	0	2,05
Romania	311	192	161	623	373	149	2,00
Russia	9 093	2 508	38	18 091	5 687	46	1,99

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of stay
		Number	%		Number	%	
Slovakia	100	8	9	169	-19	-10	1,69
Slovenia	118	61	107	202	49	32	1,71
Spain	2 022	466	30	4 142	735	22	2,05
Sweden	6 638	1 149	21	11 300	2 344	26	1,70
Switzerland	1 195	415	53	2 372	925	64	1,98
Turkey	599	271	83	1 200	467	64	2,00
Ukraine	1 093	808	284	2 395	1 635	215	2,19
United Kingdom	6 788	3 751	124	16 692	9 777	141	2,46
Other European countries	2 965	-291	-9	5 394	120	2	1,82
Total Africa	324	198	157	550	300	120	1,70
..South Africa	93	55	145	132	65	97	1,42
Total Asia	2 606	15	1	4 372	-262	-6	1,68
..China	686	301	78	1 050	491	88	1,53
..Japan	761	-551	-42	1 358	-804	-37	1,78
..South-Korea	434	75	21	561	-10	-2	1,29
United States	3 131	-102	-3	7 417	201	3	2,37
Canada	448	3	1	1 153	142	14	2,57
Total Central and South America	740	358	94	1 393	661	90	1,88
..Brasilia	250	33	15	524	106	25	2,10
Australia, Oceania	729	77	12	1 724	172	11	2,36
..Australia	621	40	7	1 503	132	10	2,42
Other countries	657	192	41	3 414	2 480	266	5,20
Total foreign tourists	141 608	25 314	22	259 953	56 854	28	1,84
Domestic tourists	14 496	3 801	36	26 800	9 198	52	1,85
Countries of residence total	156 104	29 115	23	286 753	66 052	30	1,84

Source: Statistics Estonia

Tourists by purpose of visit



	Leisure	Share, %	Business	Share, %	Conference	Share, %	Other purpose	Share, %
2006	843 771	73	235 511	20	48 158	4	33 673	3
2007	806 749	71	245 133	21	43 822	4	45 060	4
2008	869 301	73	225 261	19	64 462	5	29 501	2
2009	836 860	74	226 666	20	55 107	5	16 831	1
2010	963 395	75	275 433	21	37 557	3	12 987	1
2011 (January-June)	473 011	73	151 1118	23	22 556	3	7 417	1

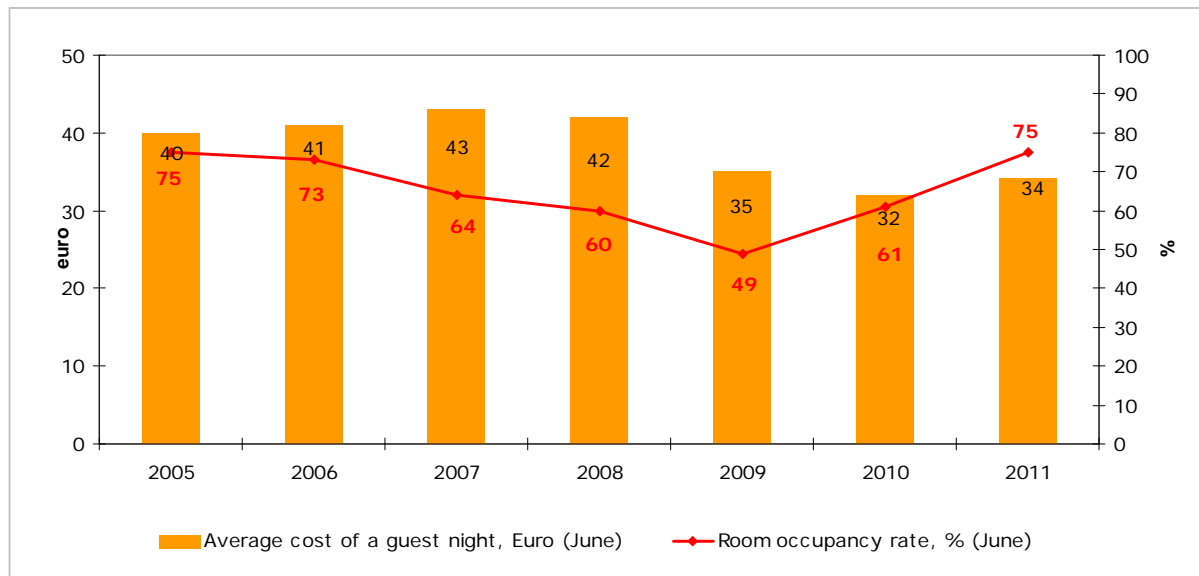
Source: Statistics Estonia

Accommodation capacity in Tallinn

	Number of units		Rooms		Beds	
	Hotels	Total	Hotels	Total	Hotels	Total
2005	46	301	4 865	5 668	9 188	10 945
2006	48	364	5 024	6 049	9 688	12 130
2007	52	395	6 035	7 076	11 709	14 456
2008	53	412	6 110	7 172	11 884	14 884
2009	57	342	6 495	7 540	12 699	15 250
2010	58	363	6 533	7 607	12 787	15 378
2011 (08.07.2011)	57	349	6 495	7 529	12 772	15 279

Source: Tallinn City Tourist Office & Convention Bureau

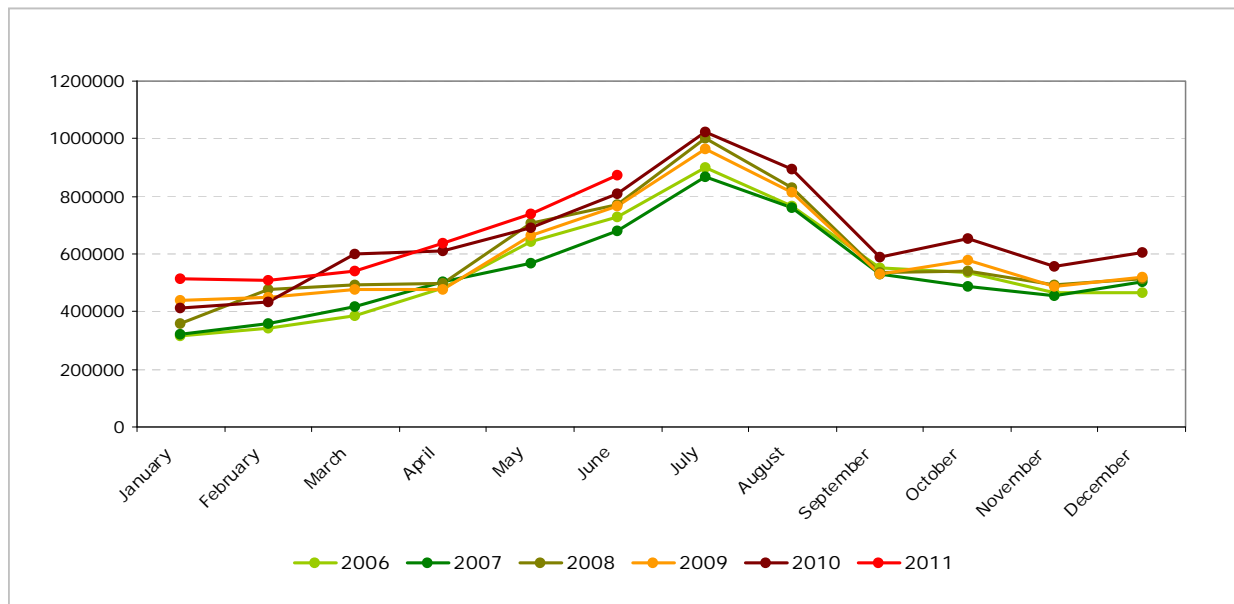
The average price of accommodation and room occupancy rate in Tallinn (2006-2011)



	Room occupancy rate, %	Average cost of a guest night, EUR
2005	60	37
2006	58	38
2007	55	39
2008	50	38
2009	44	34
2010	52	31
2011 (Jan-June)	55	32

Source: Statistics Estonia

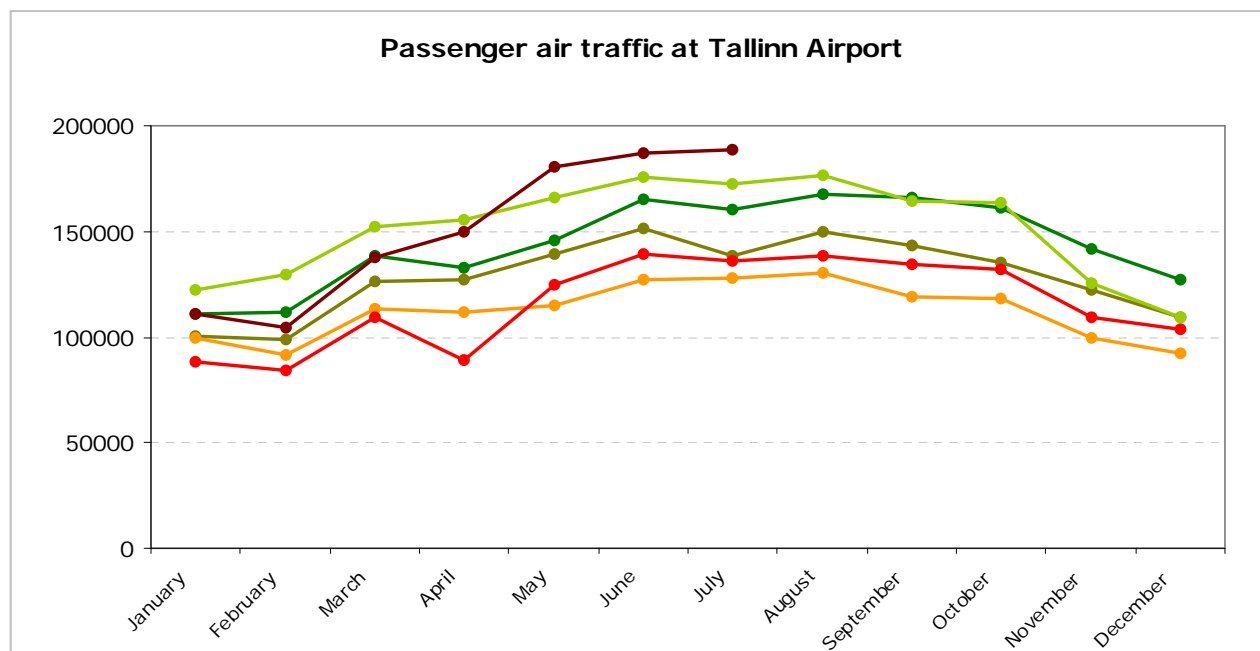
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2006-2011)



	2006	2007	2008	2009	2010	2011	Change % (2010/2011)
January	317 906	319 553	356 507	439 487	412 711	515 478	+25%
February	344 921	358 564	478 666	448 896	434 032	510 847	+12%
March	384 313	420 027	491 421	476 198	600 859	541 672	-10%
April	484 488	502 471	495 746	547 671	610 230	637 677	+5%
May	643 331	568 050	705 944	663 183	690 167	738 401	+7%
June	728 524	682 167	770 423	764 941	808 148	875 366	+8%
July	902 446	867 053	1 000 901	963 521	1 021 206		
August	765 062	758 731	832 229	816 245	893 876		
October	550 915	531 333	537 336	532 226	588 764		
October	534 187	490 097	542 484	577 465	653 824		
November	464 972	457 763	490 214	486 677	557 962		
December	466 503	502 435	512 471	518 976	607 389		
TOTAL	6 854 949	6 587 568	6 458 244	7 214 342	7 879 168	3 820 178	

Source: Port of Tallinn

Passenger air traffic at Tallinn Airport (2006-2011)



	International			Domestic			Total		
	2010	2011	change (%)	2010	2011	change (%)	2010	2011	change (%)
January	86 693	109 332	+26	1 835	1 873	+2	88 528	111 205	+26
February	82 600	102 448	+24	1 340	1 750	+30	83 940	104 198	+24
March	107 692	134 961	+25	1 591	2 296	+44	109 283	137 257	+26
April	87 644	147 386	+59	1 157	2 319	+100	88 801	149 705	+69
May	122 758	177 945	+45	1 956	2 805	+43	124 714	180 750	+45
June	137 187	183 893	+34	2 328	3 052	+31	139 515	186 945	+34
July	132 367	185 487	+40	3 386	3 532	+4	135 762	189 019	+40
August	135 267			2 999			138 266		
October	131 918			2 465			134 383		
October	129 487			2 247			131 829		
November	107 090			1 949			109 039		
December	101 475			1 926			103 401		
TOTAL	1 359 652	1 041 452		25 179	17 627		1384 381	1 059 079	

Source: Tallinn Airport

Compiled by: Karen Alamets, analyst, Tallinn City Tourist Office & Convention Bureau