

TOURISM IN TALLINN MARCH 2011

In March 2011, 157,000 tourists stayed in Estonian accommodation establishments, 54% of whom stayed in Tallinn.

Arrivals in Tallinn: 84,700 (+11%)*
Bednights in Tallinn: 156,500 (+15%)

- **Foreign tourists: 70,900 (+9%)**
Bednights of foreign tourists: 133,900 (+12%)
- **Domestic tourists: 13,800 (+23%)**
Bednights of domestic tourists: 22,600 (+39%)

Tallinn attracts Russian tourists

Finland: 56,700 nights (-5%)
Russia: 18,600 nights (+81%)
Great Britain: 8,700 nights (+51%)
Sweden: 6,100 nights (+5%)
Norway: 5,900 nights (+10%)
Latvia: 4,600 nights (+17%)
Germany: 4,500 nights (-3%)

Italy: 2,400 nights (+61%)
France: 2,300 nights (+19%)
USA: 1,900 nights (-12%)
Spain: 1 000 nights (-35%)
Belgium: 800 nights (+43%)
Japan: 400 nights (-13%)
China: 300 nights (-2%)

Business travel continue to rise

72% of **foreign tourists** stay in Tallinn for leisure purposes, 27% for business (incl. 4% a conference travel) and 1% visits for other purposes.

55% of **domestic tourists** visit for leisure 37% for business purposes, 6% for attending conferences and 2% for other purposes.

* comparison March 2010, %

Rise in length of stay

The average length of stay for tourists was **1.85 nights (+4%)**.

Stays by domestic tourists: 1.63 nights (+13%), foreign tourists: 1.89 nights (+3%). Among primary markets, British tourists spent the longest time in Tallinn (2.46 nights), and Latvians spent the shortest time (1.54 nights).

Room occupancy rates up, but average price of bednights** remained unchanged

363 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 44%, four percentage points higher than in March of the previous year.

The average cost of a bednight in an accommodation establishment was 31 Euros (+1€ or +3%).

Travelers by air increased, but by sea decreased

137,257 passengers passed through **Tallinn Airport** in March (+26%).

Passengers in **Tallinn Old Harbour** totalled **541,700 (-10%)**, of whom 88% were on the Tallinn-Helsinki line, 12% on the Tallinn-Stockholm line.

Visits of Tallinn Tourist Information Centres decreased, Tallinn tourism portal increased

Altogether 7,600 visitors (-6%) **visited Tallinn's two tourism information centres**. Tallinn tourism portal www.tourism.tallinn.ee received 101,300 visits, i.e 24% more than in March 2010.

** 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 March, the number of tourists, bed nights and revenues from sales of accommodation services increased. A total of 84,700 tourists stayed in Tallinn's accommodation establishments (11% more tourists compared with same month in 2010). Altogether a total of 70,900 foreign tourists used the services of accommodation establishments (+9% or 5,800 tourists).

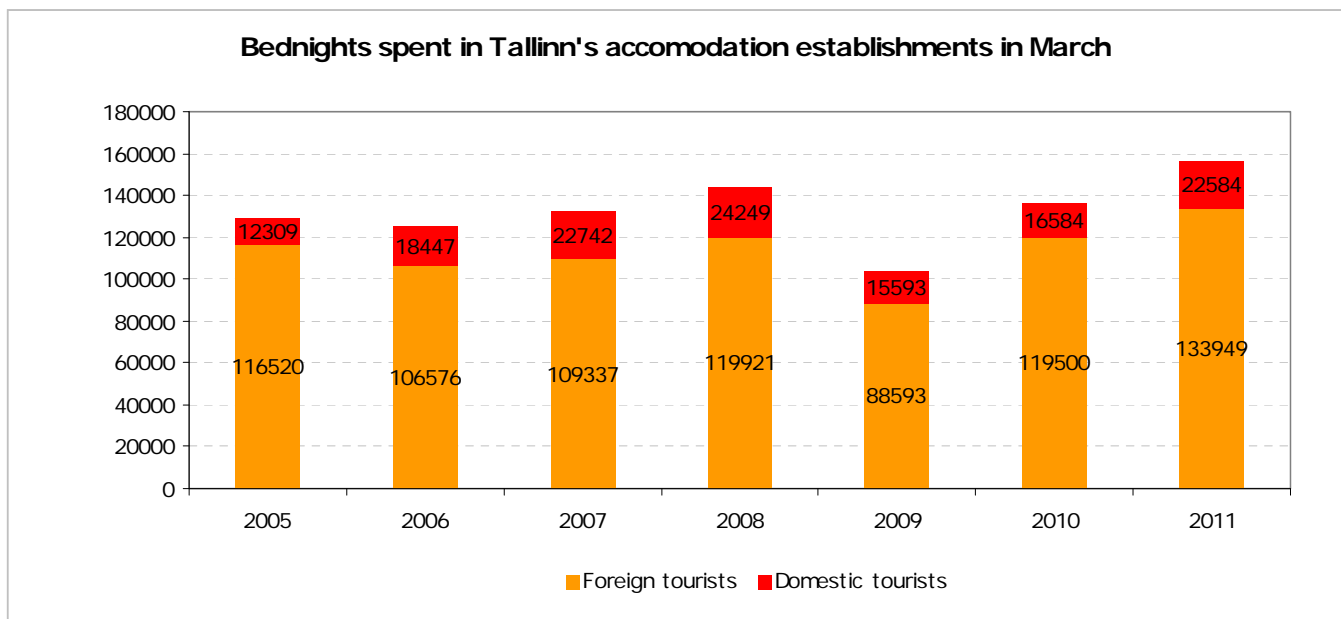


Most of (84%) accommodated visitors were foreign tourists.

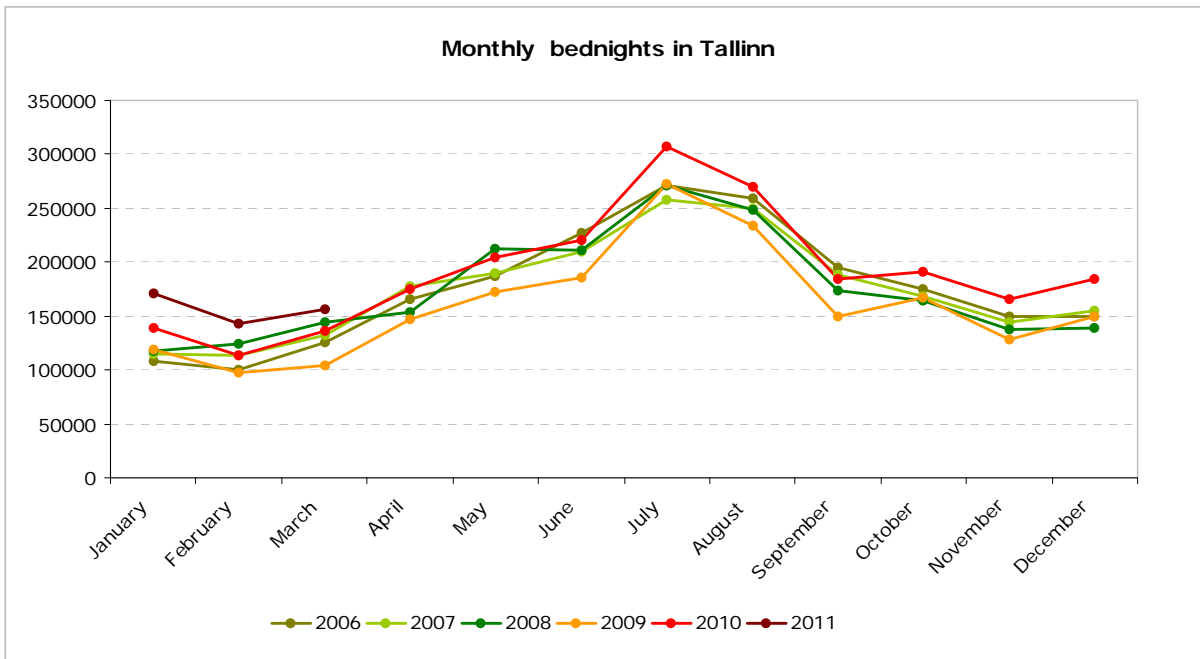
The highest number of foreign visitors arrives from Finland (34,400), Russia (9,100), Sweden (3,600) and Great Britain (3,500) and. Most (+3,700 tourists) increased number of visitors from Russia and the fastest growth (+68%) was also on the Russian market.

The number of domestic tourists increased, numbers accommodated rose 23%, by 2,600 tourists, for a total of 13,800.

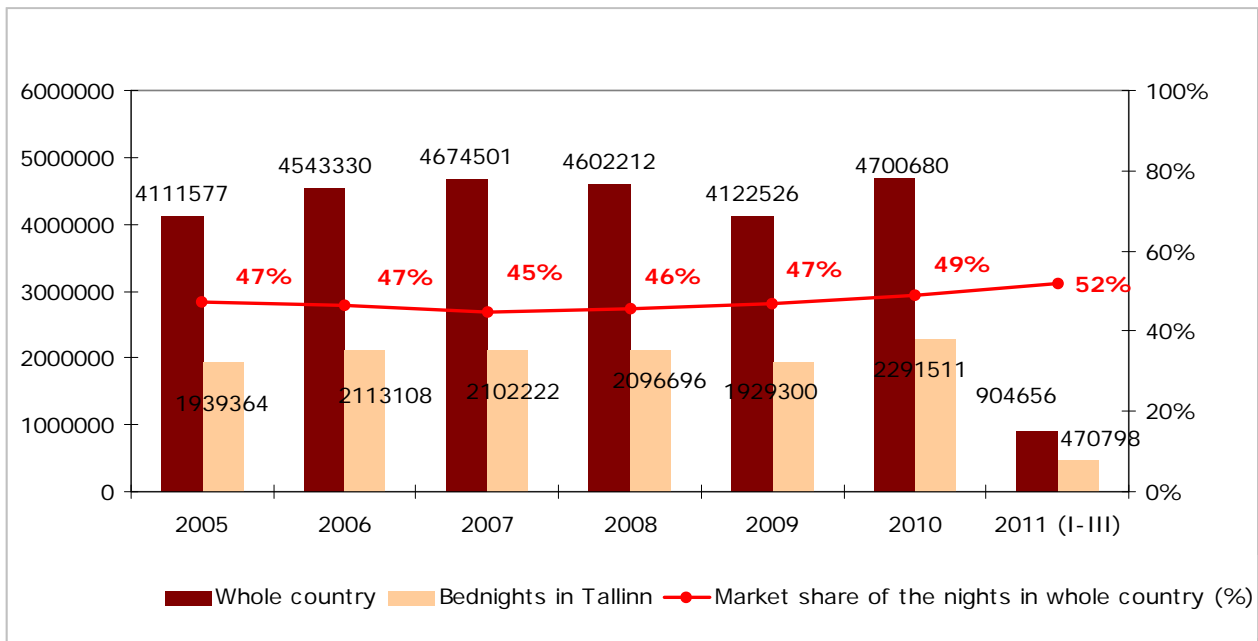
Bednights spent by tourists also rose, with a total of 156,500 bednights (+15%) spent in Tallinn's accommodation establishments. While bednights by foreign tourists rose by 12% (totalling 133,900 bednights) and bednights by Estonian residents were up 36% (total 22,600 bednights).



Monthly bednights in Tallinn



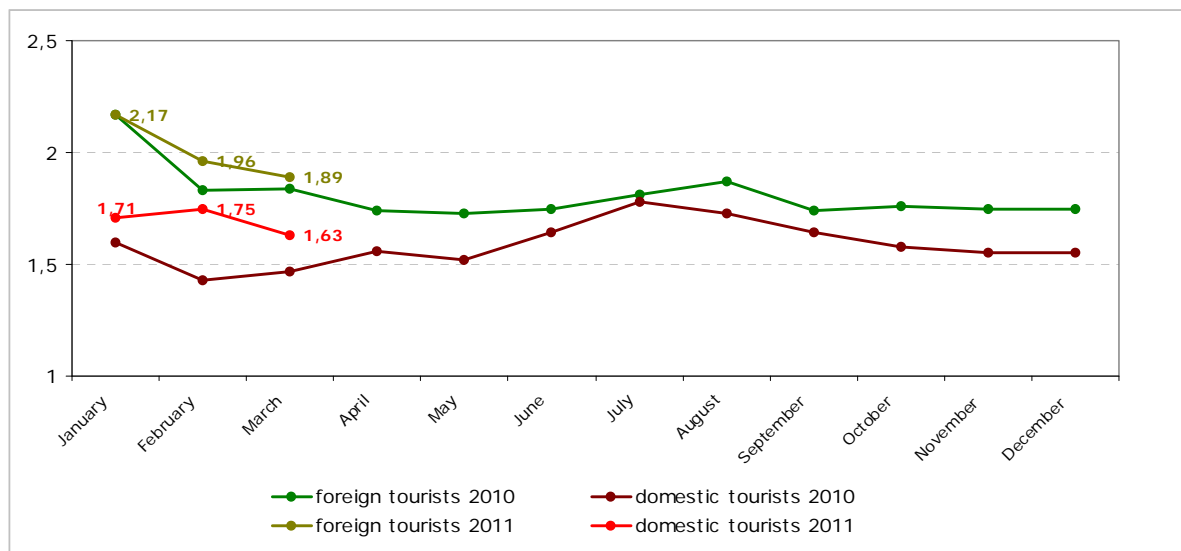
Total bednights in Tallinn and market share of the bednights in Estonia



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-March)	470 798	52%	+81 215	+21%

Excluding day traveller, visitors spent an average of 1.85 nights in March (+4%). The average trip length among domestic tourists rose by 11%, from 1.47 to 1.63 nights. The length of stay for foreign tourists was 1.89 nights (+3%). In March among Tallinn's primary markets, British tourists spent the longest time (2.46 nights) and Latvians spent the shortest time (1.54 nights).



Source: Statistics Estonia

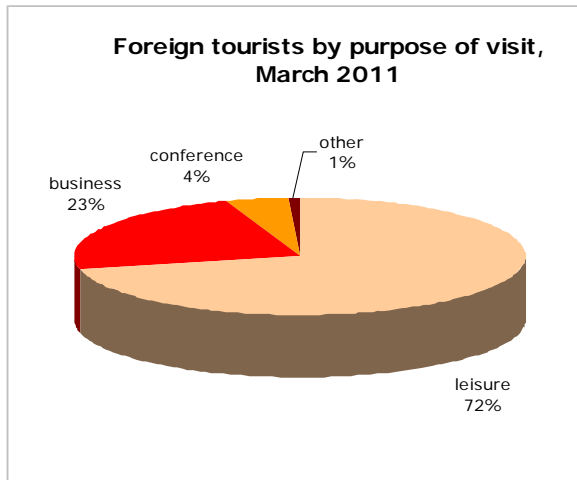
Arrivals, numbers of bednights and length of stay in March 2011

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of Stay
		Number	%		Number	%	
Albania	3	2	200	18	15	500	6,00
Austria	230	55	31	564	54	11	2,45
Belgium	361	153	74	771	232	43	2,14
Bulgaria	86	-57	-40	432	-433	-50	5,02
Croatia	75	21	39	119	-4	-3	1,59
Czech Republic	183	39	27	584	147	34	3,19
Cyprus	8	-15	-65	23	-80	-78	2,88
Denmark	708	169	31	1378	330	31	1,95
Finland	34415	-2366	-6	56682	-2824	-5	1,65
France	643	-38	-6	2295	368	19	3,57
Germany	2085	437	27	4493	-141	-3	2,15
Greece	121	-48	-28	252	-125	-33	2,08
Hungary	139	46	49	358	-150	-30	2,58
Iceland	39	-6	-13	96	26	37	2,46
Ireland	347	221	175	744	379	104	2,14
Italy	936	343	58	2414	917	61	2,58
Latvia	3028	346	13	4648	666	17	1,54
Lithuania	2036	439	27	3755	990	36	1,84
Luxembourg	39	-22	-36	60	-14	-19	1,54
Malta	8	-7	-47	11	-16	-59	1,38
Netherlands	801	455	132	1785	910	104	2,23
Norway	2570	310	14	5890	510	9	2,29
Poland	759	282	59	1639	586	56	2,16
Portugal	76	-2	-3	334	64	24	4,39
Romania	74	30	68	183	29	19	2,47
Russia	9076	3669	68	18586	8329	81	2,05

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of stay
		Number	%		Number	%	
Slovakia	47	-8	-15	129	25	24	2,74
Slovenia	52	7	16	136	42	45	2,62
Spain	415	-327	-44	1026	-561	-35	2,47
Sweden	3587	23	1	6117	261	4	1,71
Switzerland	230	-5	-2	485	61	14	2,11
Turkey	159	56	54	360	104	41	2,26
Ukraine	426	204	92	1090	564	107	2,56
United Kingdom	3525	1040	42	8667	2916	51	2,46
Other European countries	1254	454	57	2421	320	15	1,93
Total Africa	81	46	131	194	127	190	2,40
..South Africa	17	12	240	23	16	229	1,35
Total Asia	723	-9	-1	1443	27	2	2,00
..China	162	-29	-15	313	-6	-2	1,93
..Japan	187	11	6	357	-51	-13	1,91
..South-Korea	46	-19	-29	96	15	19	2,09
United States	771	-150	-16	1914	-249	-12	2,48
Canada	144	48	50	394	155	65	2,74
Total Central and South America	155	86	125	612	294	92	3,95
..Brasilia	61	37	154	241	211	703	3,95
Australia, Oceania	264	102	63	570	159	39	2,16
..Australia	253	112	79	546	166	44	2,16
Other countries	164	-266	-62	277	-561	-67	1,69
Total foreign tourists	70 843	5 757	9	133 949	14 449	12	1,89
Domestic tourists	13 837	2 555	23	22 584	6 000	36	1,63
Countries of residence total	84 680	8 312	11	156 533	20 449	15	1,85

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-March)	170 675	71	58 704	24	8 425	4	2 766	1

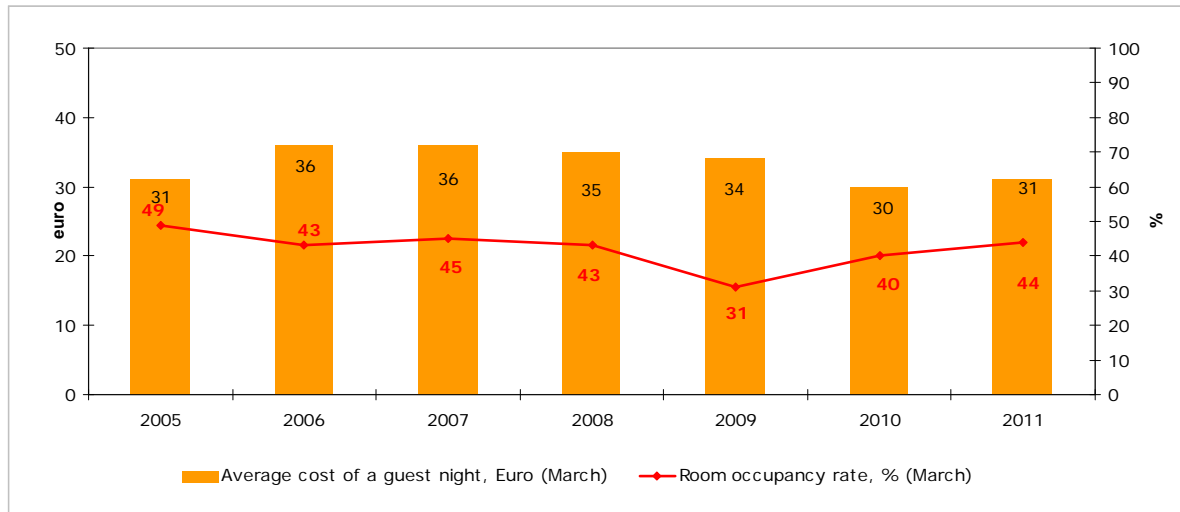
Source: Statistics Estonia

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 (in March)	58	363	6 533	7 607	12 787	15 378

Source: Tallinn City Tourist Office & Convention Bureau

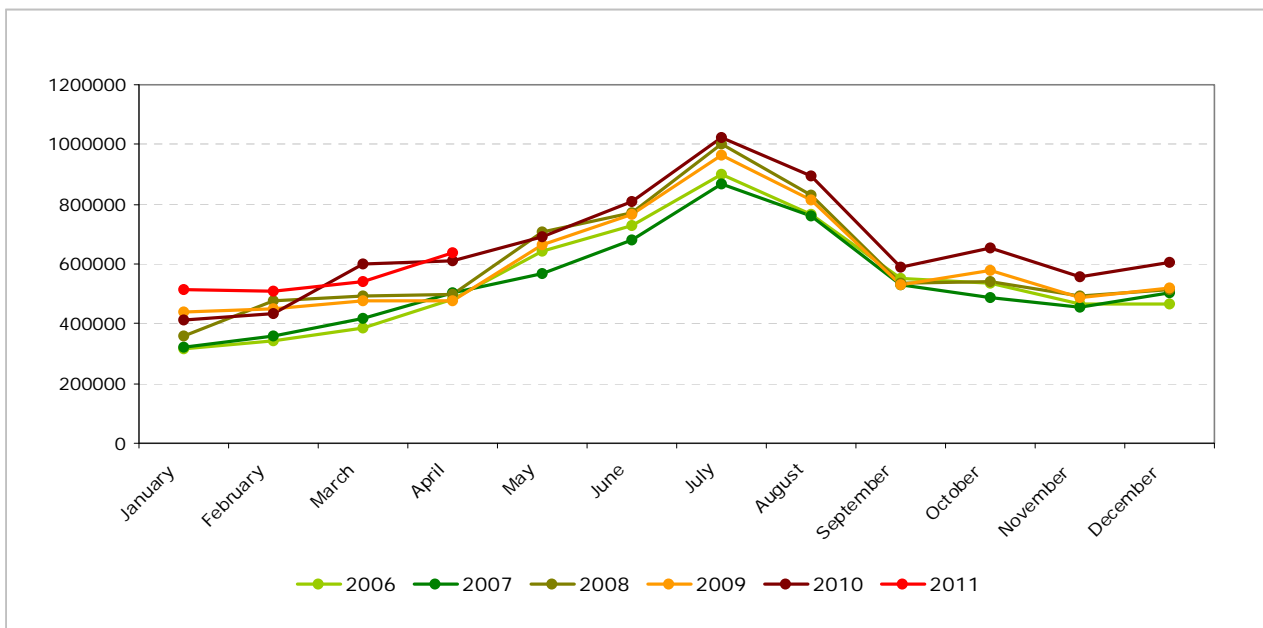
The average price of accommodation and room occupancy rate in Tallinn (2006-2011)



	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-March)	44	31

Source: Statistics Estonia

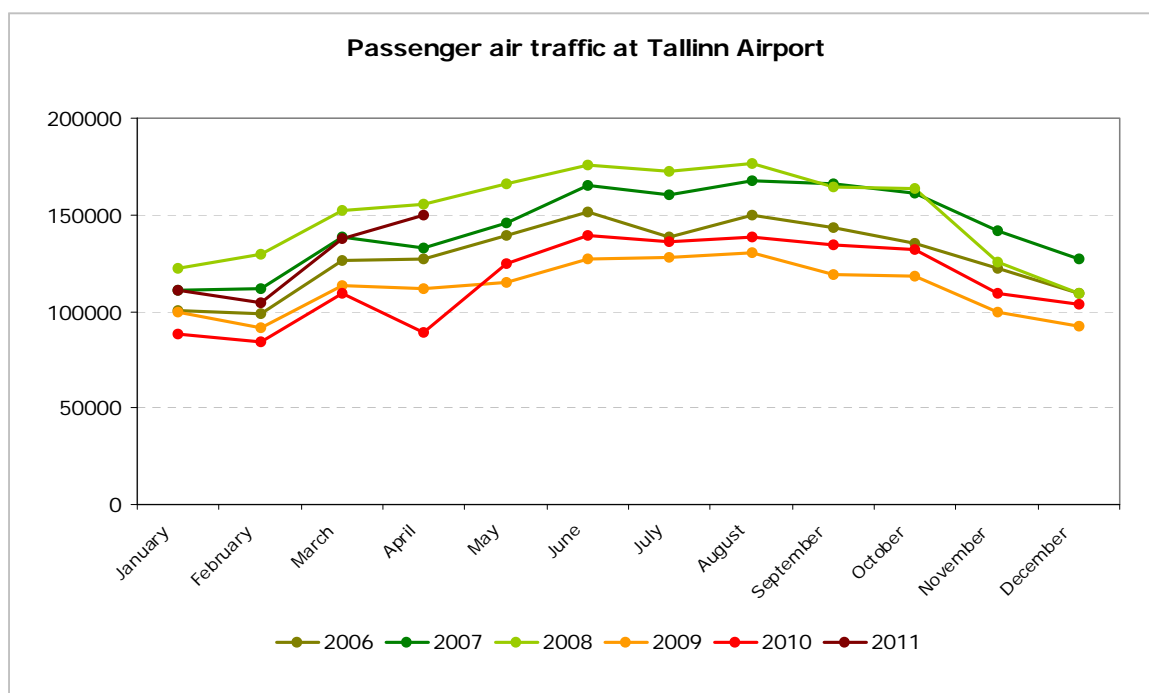
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2006-2011)



	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		
June	728 524	682 167	770 423	764 941	808 148		
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	2 206 411	

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	147 385	+59	1 157	2 319	+100	88 801	149 704	69
May	122 758			1 956			124 714		
June	137 187			2 328			139 515		
July	132 367			3 386			135 762		
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	494 126		25 179	8 238		1384 381	502 364	

Source: Tallinn Airport

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