

KEY TRENDS AND STATISTICS FIRST HALF 2013 IN TALLINN TOURISM

More than half the tourists to Estonia visited Tallinn

In the first six months of 2013, in total 1.29 million tourists stayed in Estonian accommodation establishments, more than half of them (53%) stayed in Tallinn.

Tourists in Tallinn: 683 800 (+2%)¹
Bednights in Tallinn: 1 241 600 (0%)

Some changes in primary markets

Finland: 40% (276 000 tourists)
Russia: 15% (101 100 tourists)
Estonia: 12% (82 000 tourists)
Germany: 4% (78 800 tourists)
Sweden: 3% (23 100 tourists)
Latvia: 3% (19 700 tourists)
United Kingdom: 3% (17 200 tourists)
Norway: 2% (14 800 tourists)
Other countries in total: 18% (122 300 tourists)

Important primary markets developed in different directions

Finland: 418 500 bednights (+3%)
Russia: 220 900 bednights (+14%)
Estonia: 137 700 (+12%)
Germany: 58 400 bednights (-17%)
United Kingdom: 40 200 bednights (-29%)
Sweden: 39 100 bednights (-12%)
Norway: 34 500 bednights (-18%)
Latvia: 30 700 bednights (-4%)

Length of stay shortened

On average tourists spend 1.82 bednights in Tallinn (-2%).

Foreign tourists trips: 1.83 bednights (-2%)

Domestic tourists trips: 1.68 (0%)

Majority of the tourists came for a holiday

Of all tourists in Tallinn, 72% were for leisure purposes, 23% business, 4% conference attendance and 2% other purposes.

- Leisure travel: 0%
- Business travel: +1%
- Conference travel: +15%
- Other reason travel: +84%.

The number of accommodation establishments remained unchanged, price of accommodation itself increased

297 accommodation establishment in Tallinn offered accommodation services, with in total 7 593 rooms and 15 195 bed places. Average annual room occupancy rate was 56% and this was 1% lower than the previous year. The average overnight price for visitors was 39 Euros, which is 5% more expensive than the previous year.

Numbers of air passengers decreased, travellers by sea increased

Tallinn Airport served altogether 921 600 passengers (-13%). Regular flights to 24 different destinations took place.

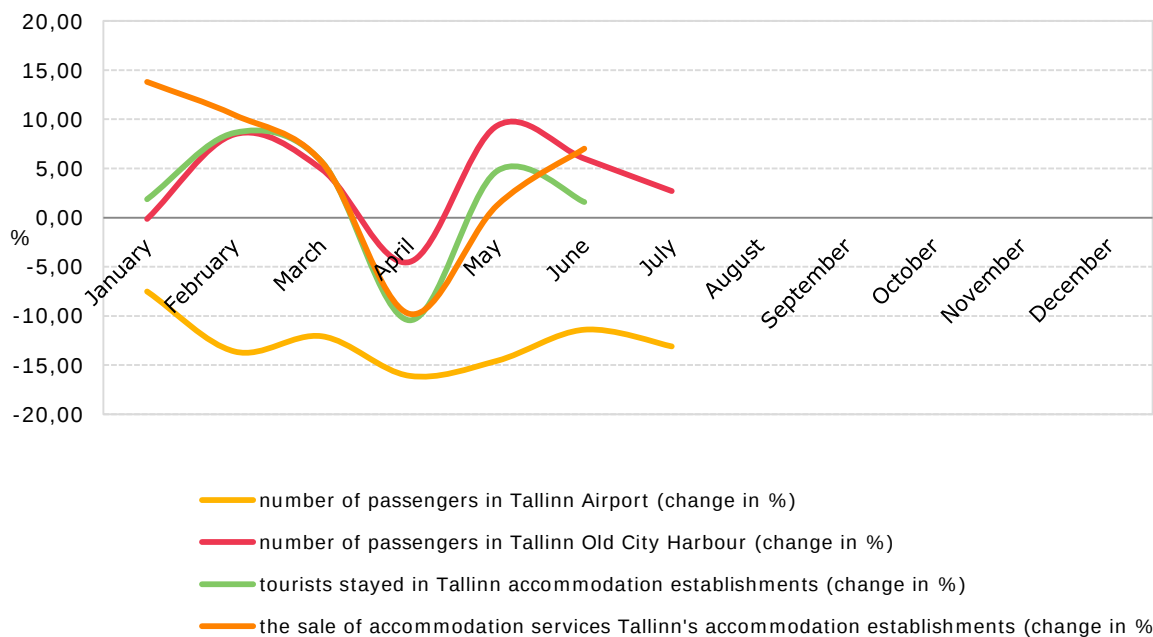
Passengers in Tallinn Old City Harbour totalled 4.2 million (+4%), of whom 82% travelled on the Tallinn-Helsinki route, 11% on the Tallinn-Stockholm line, 2% on the Russian route and 5% being cruise passengers. The number of cruise passengers grew the most, increasing by 25%.

Sharing tourism information increased

Tallinn Tourist Information Centre received over 62 600 visitors, of these 97% were foreign tourists. Tourism information on Tallinn was shared on the tourism web page, Tallinn Photo Bank, mobile applications and VisitTallinn accounts in social media. The tourism web page (www.tourism.tallinn.ee) was visited altogether 791 800 times in the first six months of 2013 (+12%). Among the biggest browsers were visitors from Finland, (+4%), Russia (+4%) and Great Britain (+3%).

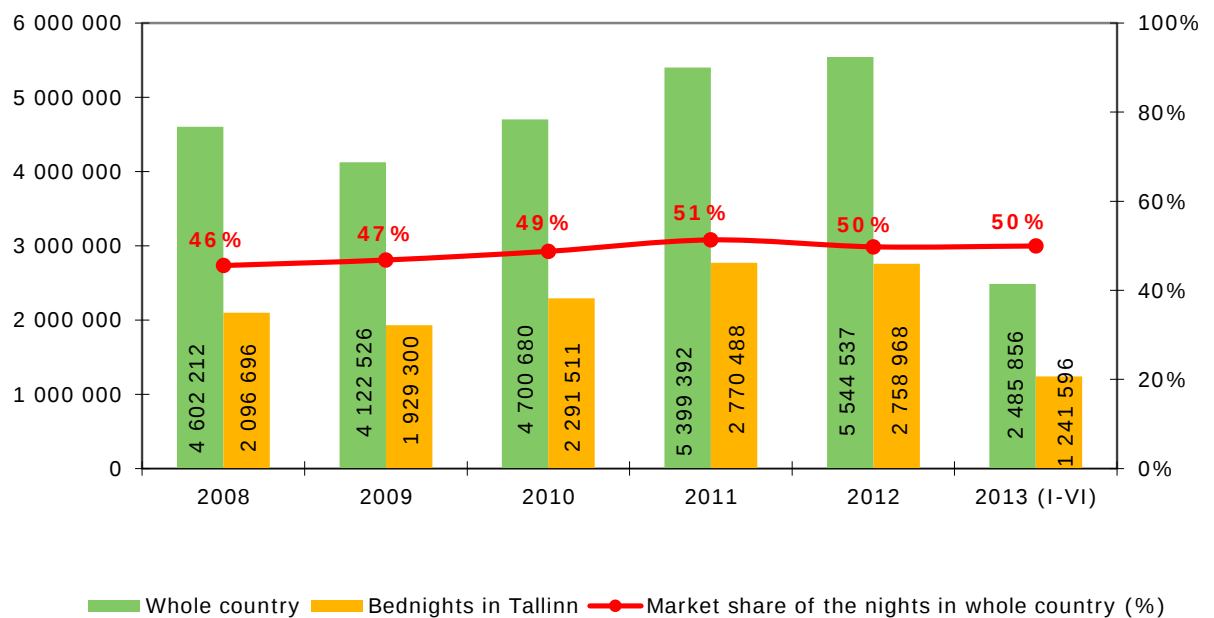
¹ Comparison with 2012 statistics

Tallinn tourism trends 2013



Source: Statistics Estonia, Port of Tallinn and Tallinn Airport

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



Source: Statistics Estonia

Bednights spent in accommodation enterprises in Tallinn

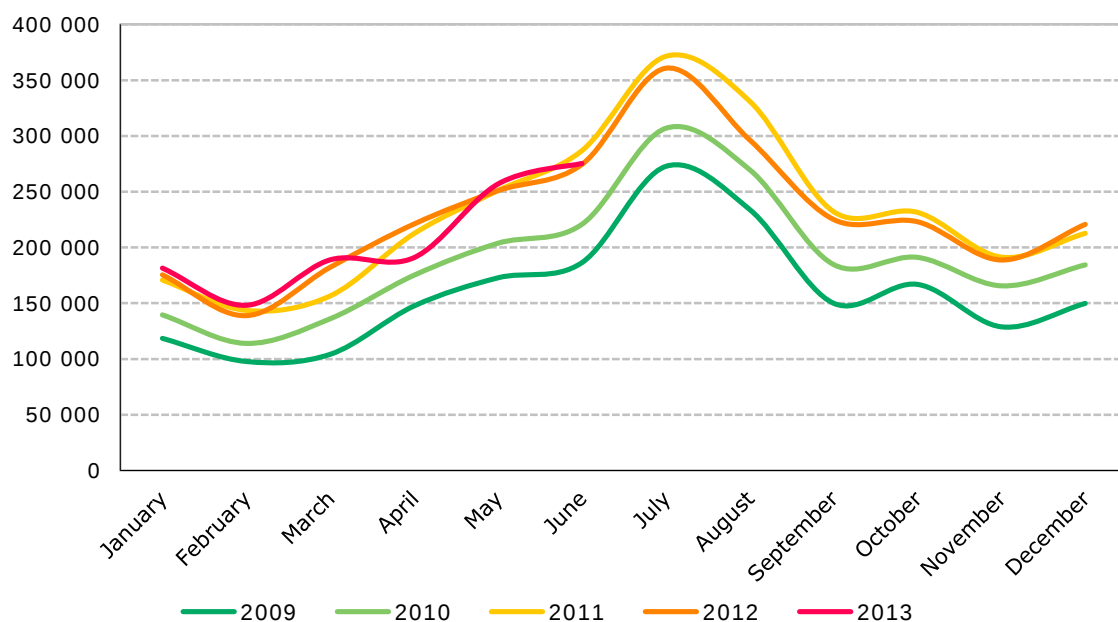


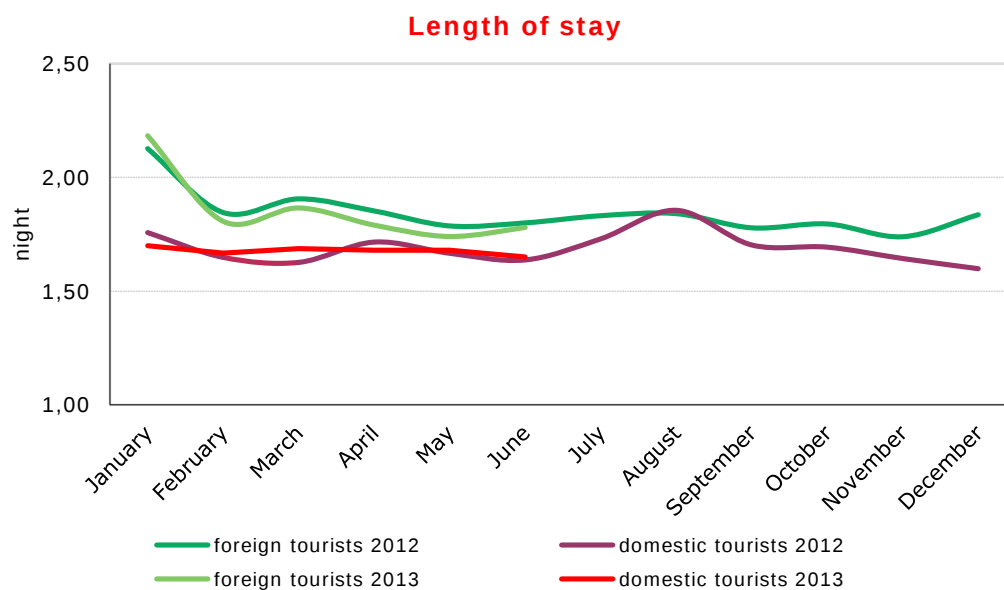
Table Total bednights in Tallinn and market share of the bednights in Estonia

	Bednights in Tallinn	Market share of the nights in whole country	Change absolute numbers from previous year	Change (%) from previous years
2008	2 096 696	46 %	-5 526	-1%
2009	1 929 300	47%	-167 396	0%
2010	2 291 511	49%	+362 211	-8%
2011	2 791 094	52%	+499 583	+19%
2012	2 758 968	50%	- 11 520	-0,4%
2013 (I-VI)	1 241 596	50%	-1 367	0%

Source: Statistics Estonia

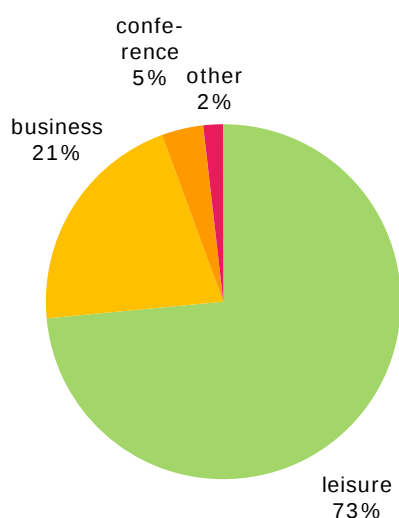
Table Arrivals, numbers of bednights and length of stay, January – June 2013

Country of residence	Arrivals	Change 2012/2013		Bed nights	Change 2012/2013		Length of Stay
		Number	%		Number	%	
Albania	47	-55	-54	125	-30	-19	2,66
Austria	1 942	-1 160	-37	4 660	-1 417	-23	2,40
Belgium	2 677	-537	-17	5 754	-1 934	-25	2,15
Bulgaria	595	-200	-25	1 509	-303	-17	2,54
Croatia	328	-191	-37	688	-285	-29	2,10
Czech Republic	1 596	-285	-15	3 514	-744	-17	2,20
Cyprus	152	-135	-47	384	-385	-50	2,53
Denmark	4 431	-1 385	-24	8 156	-2 415	-23	1,84
Finland	276 025	23 387	9	418 448	13 285	3	1,52
France	8 279	-753	-8	20 691	-2 572	-11	2,50
Germany	27 504	-5 857	-18	58 416	-12 067	-17	2,12
Greece	609	-253	-29	2 160	-162	-7	3,55
Hungary	1 208	213	21	3 966	1 911	93	3,28
Iceland	298	-10	-3	642	-88	-12	2,15
Ireland	1 188	-1 232	-51	2 633	-3 386	-56	2,22
Italy	8 081	-2 563	-24	19 516	-4 320	-18	2,42
Latvia	19 651	-1 291	-6	30 749	-1 238	-4	1,56
Lithuania	15 103	1 736	13	26 080	3 878	17	1,73
Luxembourg	331	-465	-58	611	-842	-58	1,85
Malta	159	13	9	368	11	3	2,31
Netherlands	4 932	-1 897	-28	10 581	-4 568	-30	2,15
Norway	14 796	-3 986	-21	34 549	-7 654	-18	2,34
Poland	8 324	-1 134	-12	18 418	1 436	8	2,21
Portugal	894	-169	-16	2 003	-1 002	-33	2,24
Romania	935	263	39	3 085	1 698	122	3,30
Russia	101 122	10 938	12	220 896	27 604	14	2,18
Slovakia	588	-45	-7	1 741	139	9	2,96
Slovenia	437	-325	-43	1 154	-426	-27	2,64
Spain	5437	-1158	-18	12650	-2 186	-15	2,33
Sweden	23144	-3125	-12	39 078	-5 464	-12	1,69
Switzerland	3016	72	2	5 914	93	2	1,96
Turkey	1944	-80	-4	5 207	4 94	10	2,68
Ukraine	4124	503	14	9 389	1 314	16	2,28
United Kingdom	17240	-6821	-28	40 228	-16 248	-29	2,33
Other European countries	11406	-116	-1	23 123	2 284	11	2,03
Total Africa	679	-205	-23	1 771	181	11	2,61
..South Africa	192	8	4	415	100	32	2,16
Total Asia	12994	1904	17	22 649	2 981	15	1,74
..China	2710	502	23	5 147	949	23	1,90
..Japan	3488	147	4	6 080	-177	-3	1,74
United States	10697	61	1	24 172	302	1	2,26
Canada	1359	-260	-16	3 008	-790	-21	2,21
Total Central and South America	1986	-69	-3	3 987	133	3	2,01
..Brasilia	1035	-236	-19	2 212	-36	-2	2,14
Australia, Oceania	2401	307	15	5 106	609	14	2,13
Other countries	3128	-1 849	-37	6 103	-3 690	-38	1,95
Total foreign tourists	601 787	1 786	0	1 103 882	-15 863	-1	1,83
Domestic tourists	82 035	8 458	11	137 714	14 496	12	1,68
Countries of residence total	683 822	10 244	2	1 241 596	-1 367	0	1,82



Source: Statistics Estonia

Foreign tourists by purpose of visit, the first half of 2013



Domestic tourists by purpose of visit, the first half of 2013

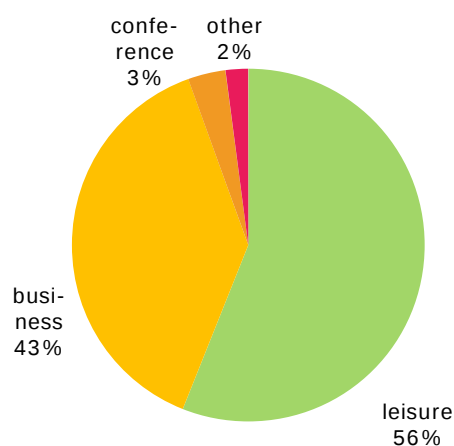


Table Tourists by purpose of visit in 2008-2013

	Leisure	Share, %	Business	Share, %	Conference	Share, %	Other purpose	Share, %
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	1 107 432	74	326 699	22	45 790	3	18 541	1
2012	1 121 825	74	333 462	22	44 674	3	16 958	1
2013 (I-VI)	488 306	71	157 237	23	25 642	3	12 637	2

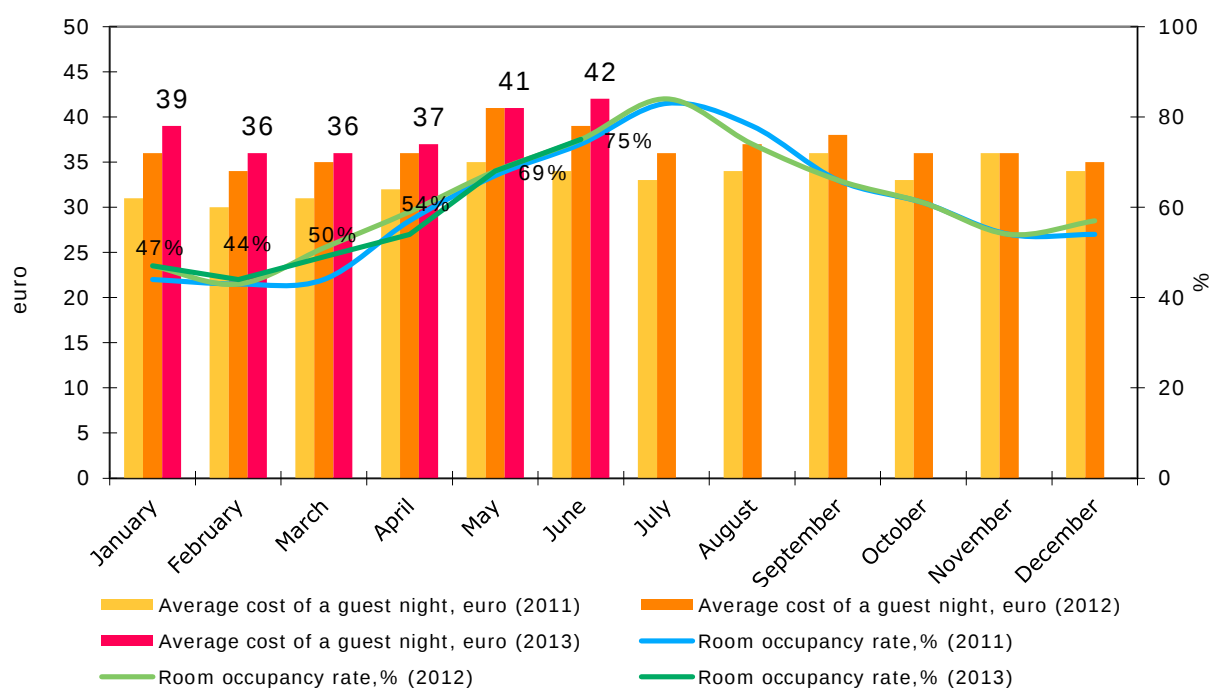
Source: Statistics Estonia

Table Accommodation capacity in Tallinn

	Number of units		Rooms		Beds	
	Hotels	Total	Hotels	Total	Hotels	Total
2009	57	342	6 495	7 540	12 699	15 250
2010	58	363	6 533	7 607	12 787	15 378
2011	58	358	6 513	7 577	12 802	15 377
2012	58	358	6 513	7 577	12 802	15 377
2013 (07.05.13)	57	297	6 467	7 593	12 684	15 195

Source: Tallinn City Tourist Office & Convention Bureau

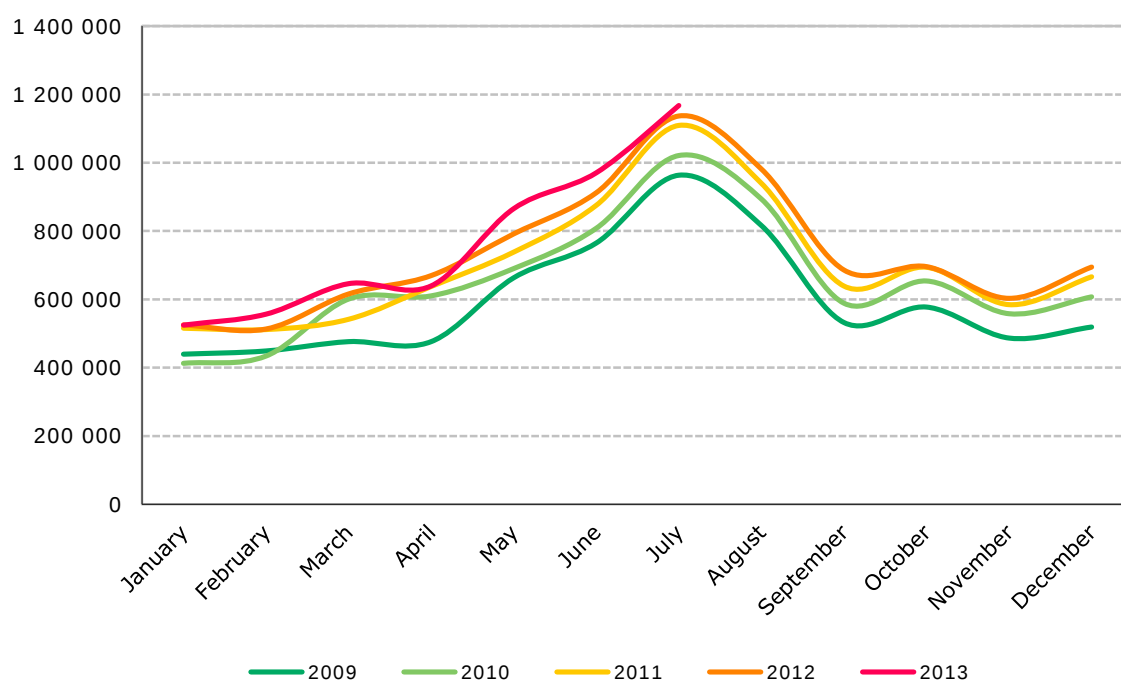
The average price of accommodation and room occupancy rate



	Room occupancy rate, %	Average cost of a guest night, EUR
2009	44	34
2010	52	31
2011	60	33
2012	61	37
2013 (Jan-June)	56	39

Source: Statistics Estonia

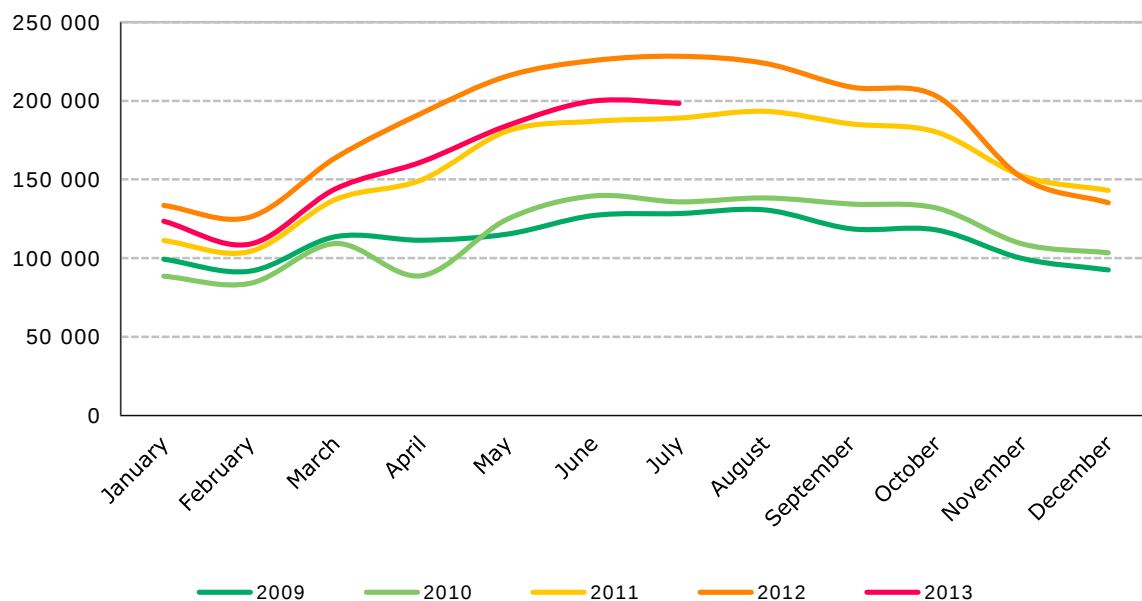
Table Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2009-2013)



	2009	2010	2011	2012	2013	Change % (2012/2013)
January	439 487	412 711	515 478	525 223	524 521	-0,2%
February	448 896	434 032	511 584	513 222	556 699	+8,5%
March	476 198	600 859	541 672	615 766	645 969	+4,9
April	547 671	610 230	637 677	669 605	639 365	-4,2%
May	663 183	690 167	738 401	791 730	865 604	+9,2%
June	764 941	808 148	875 366	912 201	970 582	+6,4%
July	963 521	1 021 206	1 109 352	1 136 953	1 167 651	+2,7%
August	816 245	893 876	939 863	981 625		
September	532 226	588 764	638 986	685 933		
October	577 465	653 824	693 285	695 845		
November	486 677	557 962	584 527	603 004		
December	518 976	607 389	666 110	694 595		
TOTAL	7 214 342	7 879 168	8 452 301	8 825 702	5 370 360	

Source: Port of Tallinn

Table Passenger air traffic (arrivals and departures) at Tallinn Airport



	International			Domestic			Total		
	2012	2013	change (%)	2012	2013	change (%)	2012	2013	change (%)
January	131 973	122 183	-7,4	1 520	1 278	-15,9	133 493	123 461	-7,5
February	124 432	107 718	-13,4	1 622	1 173	-27,7	126 054	108 891	-13,6
March	161 738	142 761	-11,8	2 045	1 256	-38,6	163 783	143 991	-12,1
April	189 935	160 019	-15,8	2 092	1 108	-47,1	192 027	161 127	-16,1
May	213 703	182 507	-14,6	1 976	1 745	-11,7	215 679	184 252	-14,6
June	223 217	198 087	-11	2 348	1 741	-26	225 565	199 828	-11,4
July	225 800	195 792	-13,3	2 487	2 544	+2,3	228 287	198 336	-13,1
August	221 250			2 565			223 815		
September	206 269			2 483			208 752		
October	200 630			2 456			203 086		
November	148 772			2 201			150 973		
December	133 887			1 390			135 277		
TOTAL	2 181 606	1 109 067		25 185	10 845		2 206 791	1 119 912	-12,8

Source: Tallinn Airport

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