

TOURISM IN TALLINN JANUARY 2011

In January 2011, 143,100 tourists stayed in Estonian accommodation establishments, 56% of whom stayed in Tallinn.

Arrivals in Tallinn: 80,300 (+21%)*
Bednights in Tallinn: 169,100 (+21%)

- **Foreign tourists: 69,000 (+19%)**
Bednights of foreign tourists: 149,700 (+19%)
- **Domestic tourists: 11,300 (+31%)**
Bednights of domestic tourists: 19,300 (+40%)

Growth in bednights continues, rise in visitors from Russia

Russia: 64,000 nights (+45%)
Finland: 42,600 nights (+1%)
Great Britain: 5,000 nights (+21%)
Sweden: 4,900 nights (+17%)
Latvia: 4,300 nights (+28%)
Norway: 3,400 nights (+3%)
Germany: 3,000 nights (-3%)

Italy: 2,300 nights (-6%)
USA: 1,400 nights (+22%)
France: 1,300 nights (-35%)
Spain: 600 nights (+26%)
Japan: 500 nights (-3%)
Belgium: 400 nights (-33%)
China: 400 nights (+31%)

Most of accommodated visitors arrived for holidays

76% of **foreign tourists** stay in Tallinn for leisure purposes, 23% for business (incl. 2% a conference travel) and 1% visits for other purposes.

60% of **domestic tourists** visit for leisure 35% for business purposes, 3% for attending conferences and 2% for other purposes.

* comparison January 2010, %

Length of stay remains almost unchanged

The average length of stay for tourists was 2.11 nights (+1%).

Stays by domestic tourists: 1.71 nights (+7%), foreign tourists: 2.17 nights (0%).

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%, six percentage points higher than in December of the previous year.

The average cost of a bednight in an accommodation establishment was 31€, which is 3% more expensive compared to January 2010.

Travelers by air and by sea increased

111,205 passengers passed through **Tallinn Airport** in January (+26%). In January Ryanair started routes to Düsseldorf, Stockholm, Oslo, Dublin, Milan London and Edinburgh.

Passengers in **Tallinn Old Harbour** totalled **515,500 (+25%)**, of whom 83% were on the Tallinn-Helsinki line, 15% on the Tallinn-Stockholm line and 2% cruise passengers. 6 cruise ships visited Tallinn in January.

Visits of Tallinn Tourist Information Centres decreased

7,600 visitors (-12%) visited Tallinn's two tourism information centers.

** 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 January, the number of tourists, bed nights and revenues from sales of accommodation services increased. Better air connections and opening events for the European Capital of Culture have influenced in this month tourism numbers.

A total of 80,300 tourists stayed in Tallinn's accommodation establishments (21% more tourists compared with same month in 2010). Altogether a total of 69,000 foreign tourists used the services of accommodation establishments (+19% or 11,000 tourists).

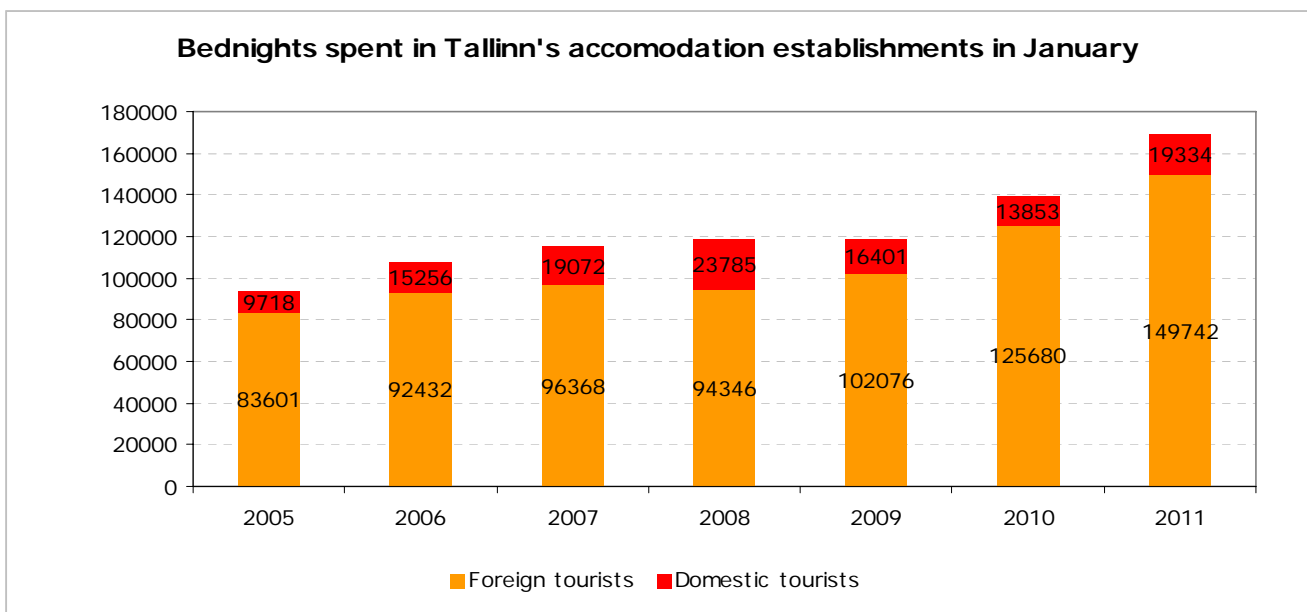


Most of (86%) accommodated visitors were foreign tourists.

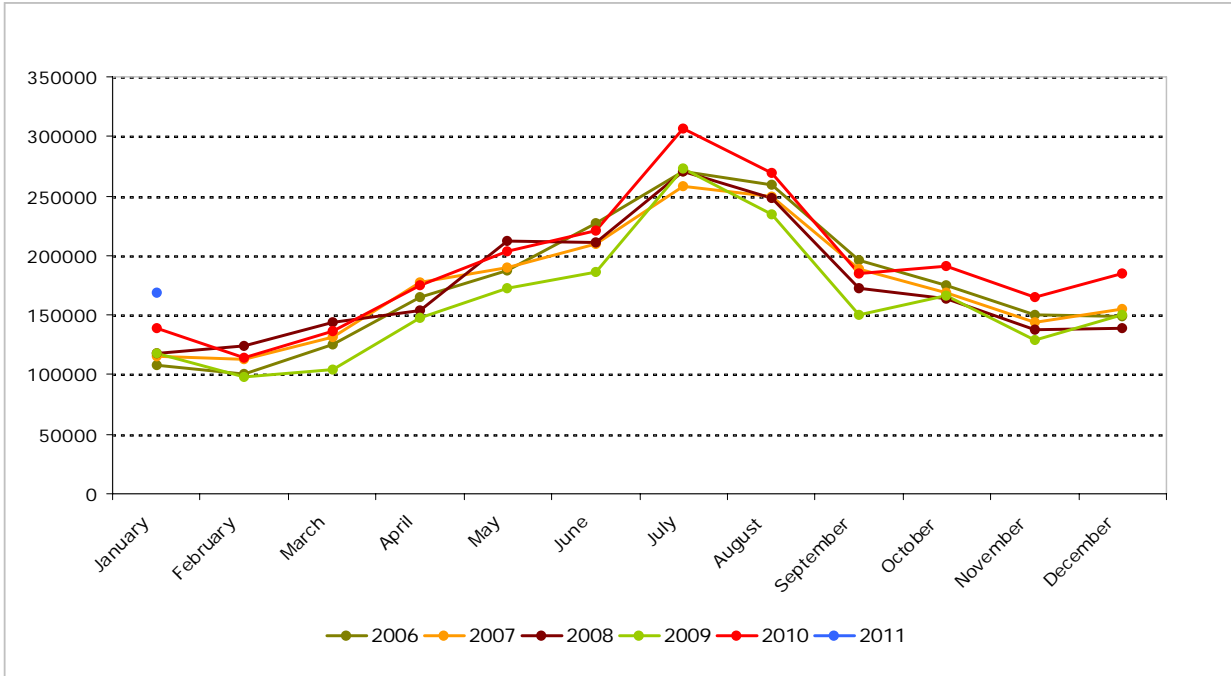
The highest number of foreign visitors arrives from Finland (26 200), Russia (22 600), Latvia (2 700), Sweden (2 600) and Great Britain (2 100). Most (+7,500 tourists) increased number of visitors from Russia and the fastest growth were (+50%) also on the Russian market. Great Britain has grown by 35 percent, the Latvia 25 and Sweden 21.

The number of domestic tourists increased, numbers accommodated rose 31%, by 2,600 tourists, for a total of 11,300.

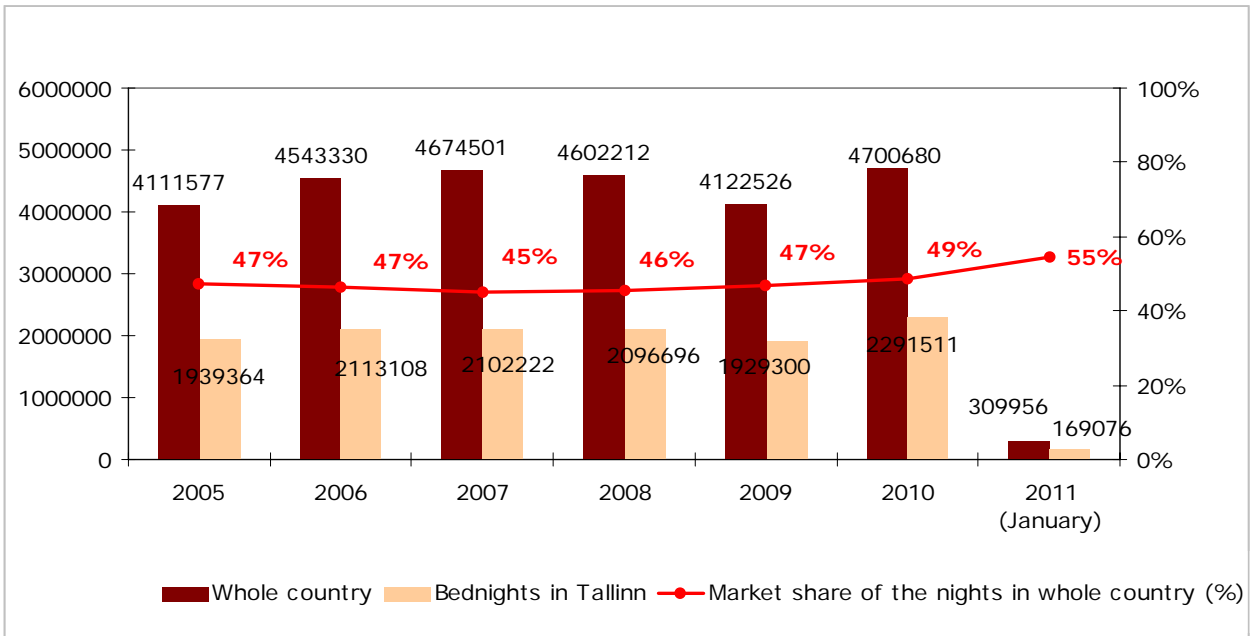
Bednights spent by tourists also rose, with a total of 169,100 bednights (+21%) spent in Tallinn's accommodation establishments. While bednights by foreign tourists rose by 19% (totalling 149,700 bednights) and bednights by Estonian residents were up 40% (total 19,300 bednights).



Monthly bednights in Tallinn



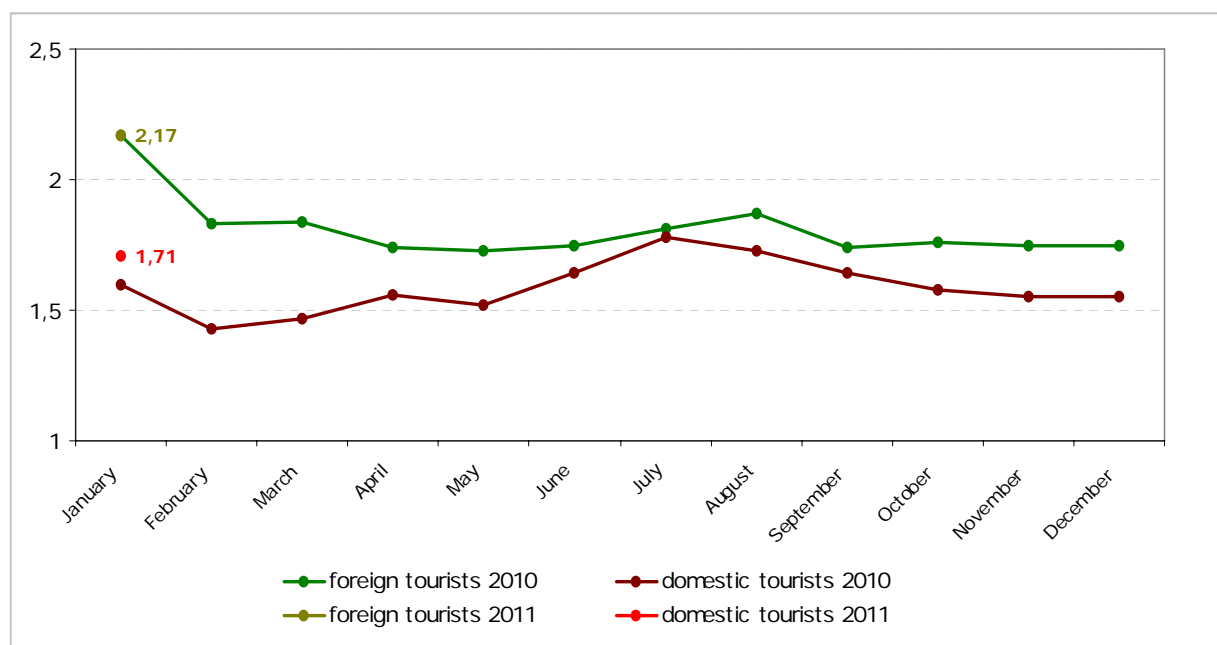
Total bednights in Tallinn and market share of the bednights in Estonia



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)	169 076	55%	+29 543	+21%

Excluding day traveller, visitors spent an average of 2.11 nights in January (+0%). The average trip length among domestic tourists rose by 7%, from 1.60 to 1.71 nights. The length of stay for foreign tourists was 2.17 nights (0%). In January among Tallinn's primary markets, Russian tourists spent the longest time (2.83 nights) and Latvians spent the shortest time (1.60 nights).



Source: Statistics Estonia

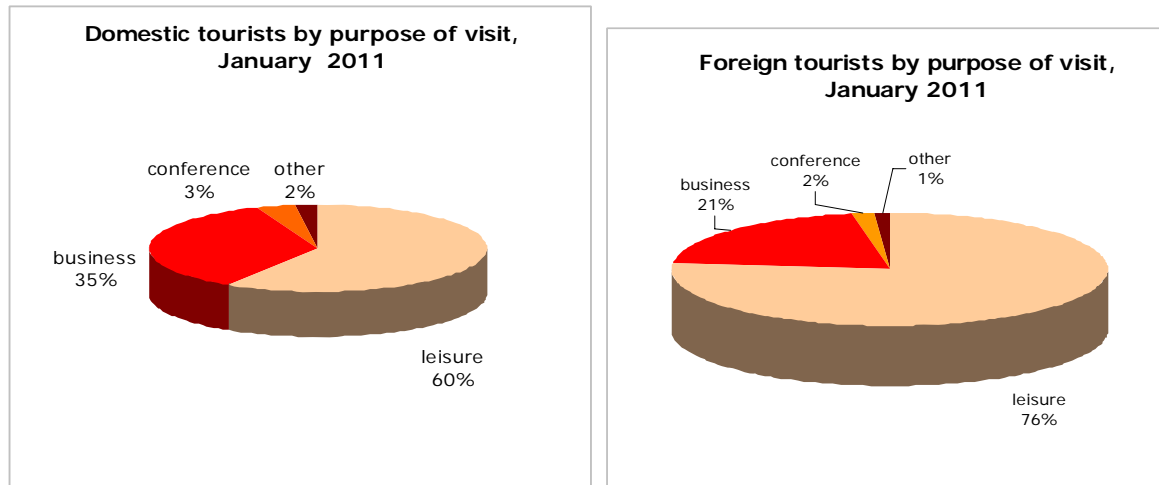
Arrivals, numbers of bednights and length of stay in January 2011

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of Stay
		Number	%		Number	%	
Austria	188	75	66	384	4	1	2,04
Belgium	175	30	21	415	-204	-33	2,37
Bulgaria	112	-16	-13	214	-222	-51	1,91
Croatia	22	-1	-4	31	-14	-31	1,41
Czech Republic	110	3	3	285	-15	-5	2,59
Cyprus	37	-4	-10	74	-56	-43	2,00
Denmark	354	-19	-5	670	-89	-12	1,89
Finland	26 181	106	0	42 613	445	1	1,63
France	605	-57	-9	1309	-716	-35	2,16
Germany	1 341	220	20	3 033	-84	-3	2,26
Greece	90	-151	-63	177	-287	-62	1,97
Hungary	154	74	93	1 220	826	210	7,92
Iceland	26	12	86	47	10	27	1,81
Ireland	274	184	204	766	553	260	2,80
Italy	802	51	7	2 304	-148	-6	2,87
Latvia	2 713	535	25	4 333	935	28	1,60
Lithuania	1197	72	6	2 000	70	4	1,67
Luxembourg	26	-10	-28	39	-20	-34	1,50
Malta	11	0	0	26	8	44	2,36
Netherlands	636	382	150	1341	738	122	2,11
Norway	1 512	110	8	3 405	96	3	2,25
Poland	394	54	16	884	113	15	2,24
Portugal	62	3	5	358	79	28	5,77
Romania	56	10	22	108	-42	-28	1,93
Russia	22 607	7546	50	63 951	19 809	45	2,83

Country of residence	Arrivals	Change 2010/2011		Bednights	Change 2010/2011		Length of stay
		Number	%		Number	%	
Slovakia	45	5	13	133	17	15	2,96
Slovenia	26	-1	-4	76	18	31	2,92
Spain	225	23	11	627	128	26	2,79
Sweden	2 630	450	21	4 885	708	17	1,86
Switzerland	203	-97	-32	403	-295	-42	1,99
Turkey	140	-5	-3	318	-46	-13	2,27
Ukraine	258	-188	-42	615	-873	-59	2,38
United Kingdom	2 146	560	35	4 989	867	21	2,32
Other European countries	1 098	310	39	2 246	690	44	2,05
Total Africa	71	11	18	126	-33	-21	1,77
..South Africa	33	30	1000	34	29	580	1,03
Total Asia	720	24	3	1 446	13	1	2,01
..China	204	62	44	403	95	31	1,98
..Japan	294	80	37	456	-12	-3	1,55
..South-Korea	43	-69	-62	99	-61	-38	2,30
United States	668	229	52	1402	254	22	2,10
Canada	83	-8	-9	146	-111	-43	1,76
Total Central and South America	63	6	11	171	52	44	2,71
..Brasilia	42	17	68	125	56	81	2,98
Australia, Oceania	125	0	0	283	-1	0	2,26
..Australia	120	37	45	265	59	29	2,21
Other countries	820	469	134	1 889	885	88	2,30
Total foreign tourists	69 006	10 997	19	149 742	24 062	19	2,17
Domestic tourists	11 314	2 679	31	19 334	5 481	40	1,71
Countries of residence total	80 320	13 676	21	169 076	29 543	21	2,11

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	59 642	74	18 191	23	1 460	2	1 027	1

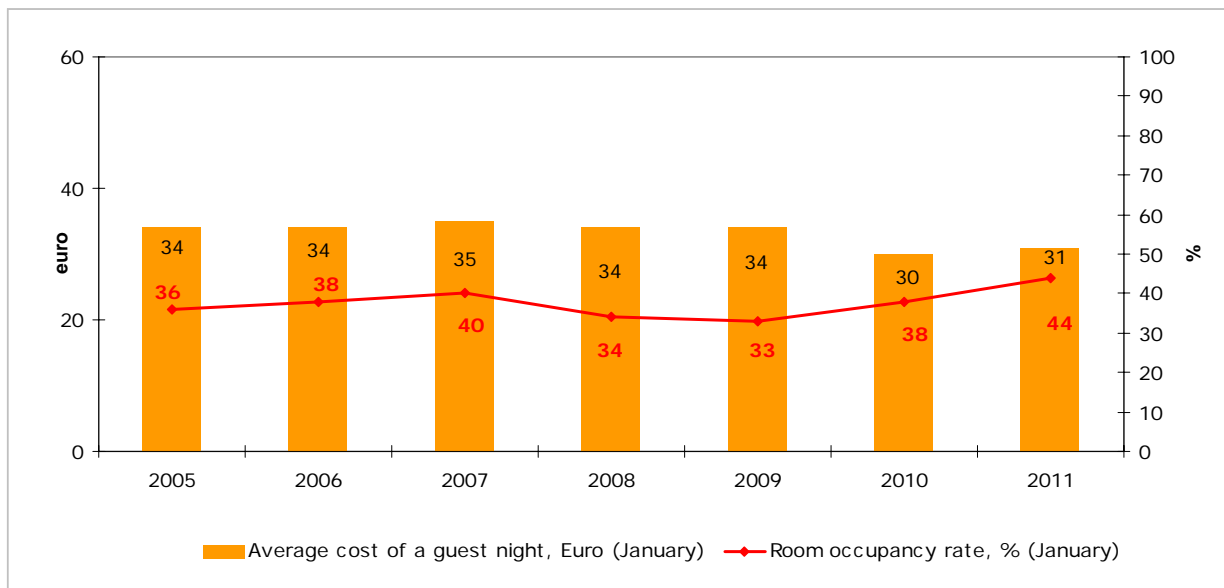
Source: Statistics Estonia

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 January)	58	363	6 533	7 607	12 787	15 378

Source: Tallinn City Tourist Office & Convention Bureau

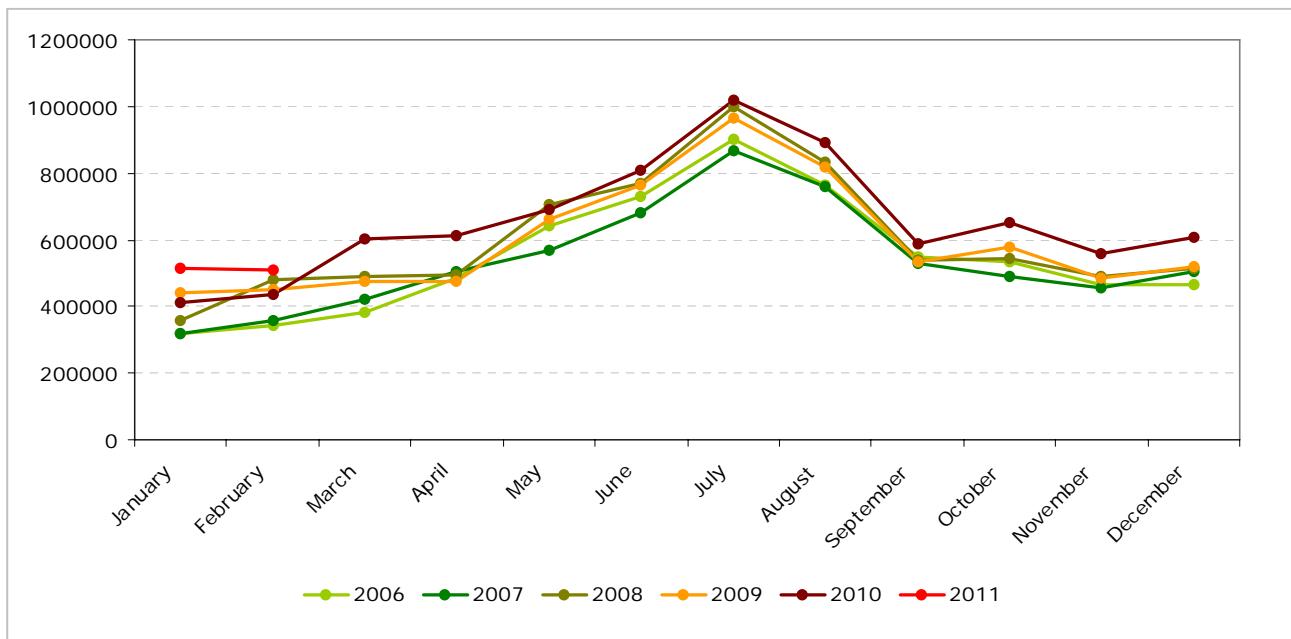
The average price of accommodation and room occupancy rate in Tallinn (2005-2011)



	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 (January)	44	31

Source: Statistics Estonia

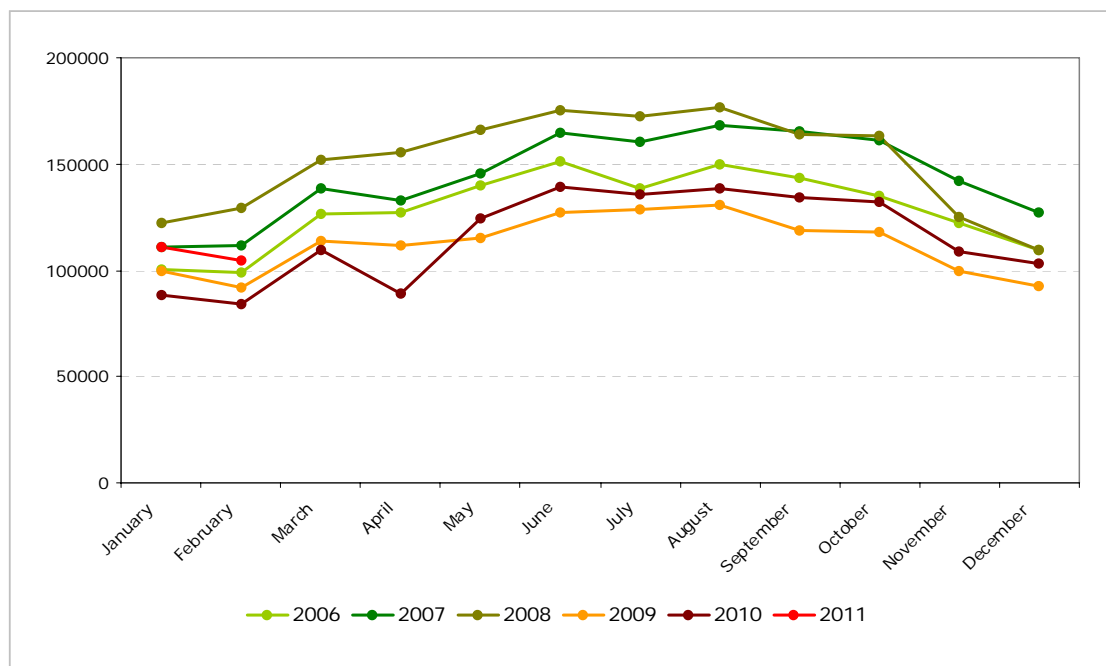
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2006-2011)



	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		
April	484 488	502 471	495 746	547 671	610 230		
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	1 026 325	

Source: Port of Tallinn

Passenger air traffic at Tallinn Airport (2005-2010)



	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	102 506	24	1 340	1 750	30	83 940	104 256	24
March	107 692			1 591			109 283		
April	87 644			1 157			88 801		
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	211 838		25 179	3 623		1384 381	215 461	

Source: Tallinn Airport

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