

Annual roundup of tourism in Tallinn for 2001

World tourism stalls, Tallinn keeps the pace

Growth in the normally buoyant tourism sector ground to a halt in 2001 and international arrivals slipped by 1.3% due to the terrorist attacks of September 11 and the weakening economies of major tourism generating markets, according to the World Tourism Organization.

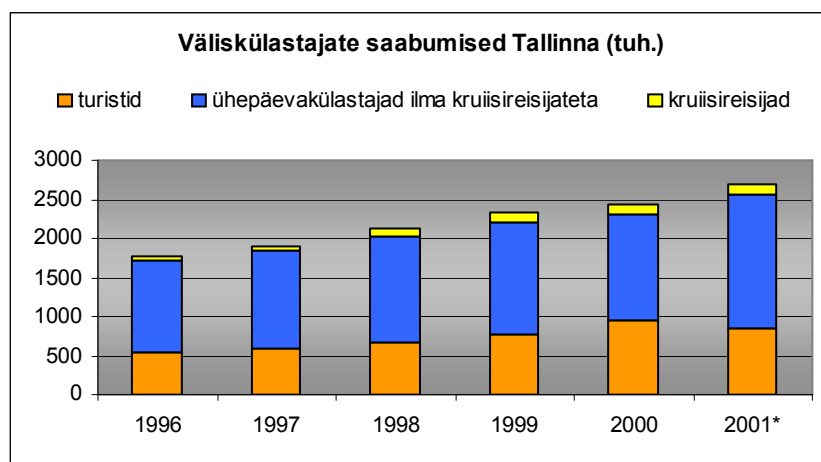
For the first time since 1993 the number of foreign visitor arrivals declined in Tallinn in 2001. The decrease was mainly caused by the day cruising Finns (-100,000 y-o-y). At the same time, slowly, but surely the number of foreign tourists staying overnight in Tallinn keeps growing. The same tendency is apparent in the cruising niche. Before having a closer look at the statistics below one has to be reminded, that in 2001 a new methodology of accounting foreign visitors and tourists was introduced.

Table 1. Foreign arrivals to Tallinn (1000), 1996-2001

	1996	1997	1998	1999	2000	2001*
Tourists	532	584	660	760	950	854
Day visitors	1194	1266	1374	1455	1368	1701
Cruise passengers	51	56	92	106	109	134
Total:	1777	1906	2126	2321	2427	2689

* in 2001 a new methodology of accounting foreign visitors and tourists was introduced.

Sources: EE ETB, Border Guard Board



Accommodation

Tourists staying overnight amounted to 32% out of all foreign visitors in Tallinn. 80% was accommodated at accommodation facilities, 20% stayed with friends and relatives and used other means of staying in Tallinn.

The number of foreign tourists with accommodation increased in Tallinn by 9% in 2001. However, a cooling in growth is obvious as on annual basis the increase used to be about 15% so far. The amount of bednights increased by 10%. The average stay amounts to 1.5 nights.

The peak of the increase – more than 10% - was reached during the peak season (QII and III), but the pace was slow to pick up in the beginning of the year – increase less than 2% (in QI).

The highest numbers of accommodated foreign tourists were registered in July, the lowest in January-March and December.

There is no significant change to be seen concerning the motivation of the tourists – the largest segment is on leisure and holiday trip (63% of accommodated tourists) with business trips (34%) and other reasons (4%) far behind.

The overnights from Russia skyrocketed in January, June, July and December and the annual increase amounted to 44%. Pace-wise Great Britain and Ireland did almost as well with the increase of 41% in overnights (the most drastic leap in January-March and June) with Germany as the solid third with the increase of 23% (the best results in May-August and February). The only slipping was registered by Swedes (-5%).

However, Finns still dominate in Tallinn with 64% of all foreign overnights (in 2000 59%). Other largest foreign overnight segments are Swedish, German and British and Irish tourists.

Table 2. Accommodated tourists in Tallinn, 1995-2001

	1995	1996	1997	1998	1999	2000	2001
Foreign	235153	292698	370926	426353	536024	626471	685117
Domestic	38450	33576	45309	51251	63006	70294	73293
Total:	273603	326274	416235	477604	599030	696765	758410

Source: Statistical Office of Estonia

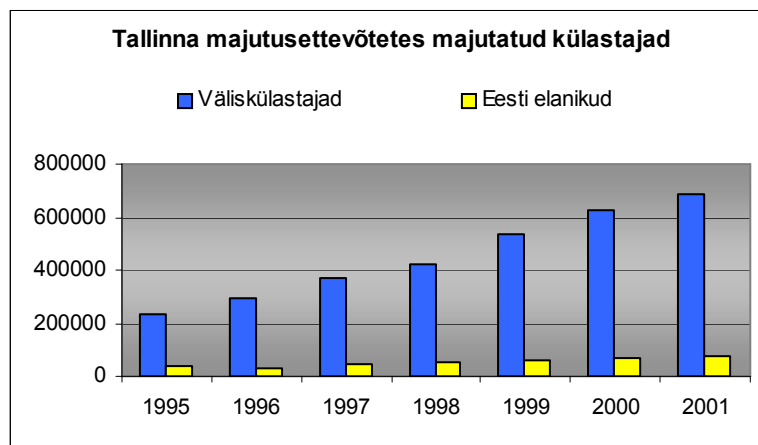


Table 3. Accommodated tourists in Tallinn by nationality, 1999-2001

	1999	2000	2001	change 1999- 2000	% change 1999- 2000	change 2000- 2001	% change 2000- 2001
TOTAL	599030	696765	758410	97735	16	61645	9
Estonia	63006	70294	73293	7288	12	2999	4
Foreign Total	536024	626471	685117	90447	17	58646	9
Finland	358583	424453	467401	65870	18	42948	10
Sweden	38265	46326	39945	8061	21	-6381	-14
Denmark	9582	7803	7753	-1779	-19	-50	-1
Germany	19901	22781	28260	2880	14	5479	24
Benelux	4608	5134	5462	526	11	328	6
France	4532	3573	3923	-959	-21	350	10
Austria	1562	1644	1445	82	5	-199	-12
Great Britain, Ireland	13775	16294	19937	2519	18	3643	22
Spain, Portugal	1872	2667	4411	795	42	1744	65

Greece	305	486	309	181	59	-177	-36
Italy	4738	5146	6120	408	9	974	19
Norway	8381	12110	12705	3729	44	595	5
Switzerland	1515	1871	2279	356	23	408	22
CIS	17525	19765	23714	2240	13	3949	20
Incl. Russia	11906	14478	18872	2572	22	4394	30
Latvia	13051	14943	15282	1892	14	339	2
Lithuania	7071	8198	8540	1127	16	342	4
Poland	1945	2847	4435	902	46	1588	56
Czech and Slovak Rep.	1125	1097	901	-28	-2	-196	-18
Hungary	664	1019	784	355	53	-235	-23
Albania, Bulgaria, Romania	408	314	316	-94	-23	2	1
Slovenia	48	28	122	-20	-42	94	336
Other European states	2800	2750	2360	-50	-2	-390	-14
USA	11723	10539	11783	-1184	-10	1244	12
Canada	1428	1061	1342	-367	-26	281	26
Japan	4978	6056	6128	1078	22	72	1
Other	5639	7566	9460	1927	34	1894	25

Source: Statistical Office of Estonia

Table 4. Overnights in Tallinn, 1999-2001

	1999	2000	2001	change 1999- 2000	% change 1999- 2000	change 2000- 2001	% change 2000-2001
TOTAL	857939	1010118	1105888	152179	18	95770	9
Estonia	90549	101861	108198	11312	12	6337	6
Foreign total	767390	908257	997690	140867	18	89433	10
Finland	440915	539708	576212	98793	22	36504	7
Sweden	58620	69534	65970	10914	19	-3564	-5
Denmark	18187	13916	14665	-4271	-23	749	5
Germany	38285	42509	52155	4224	11	9646	23
Benelux	9874	11076	12423	1202	12	1347	12
France	7993	7188	8179	-805	-10	991	14
Austria	2736	3077	2795	341	12	-282	-9
Great Britain, Ireland	31296	35834	50061	4538	15	14227	40
Spain, Portugal	2975	3992	6504	1017	34	2512	63
Greece	728	1098	786	370	51	-312	-28
Italy	10434	10909	13485	475	5	2576	24
Norway	16351	22402	27058	6051	37	4656	21
Switzerland	2648	3614	4393	966	36	779	22
CIS	32218	38417	48089	6199	19	9672	25
Incl. Russia	20777	26821	38023	6044	29	11202	42
Latvia	18758	22017	22521	3259	17	504	2

Lithuania	11107	12907	14000	1800	16	1093	8
Poland	3847	5343	9282	1496	39	3939	74
Czech and Slovak Rep.	2100	2452	2201	352	17	-251	-10
Hungary	2250	3792	2136	1542	69	-1656	-44
Albania, Bulgaria, Romania	841	774	784	-67	-8	10	1
Slovenia	143	60	324	-83	-58	264	440
Other European states	5302	6101	5742	799	15	-359	-6
USA	26636	27400	28533	764	3	1133	4
Canada	3485	2650	3196	-835	-24	546	21
Japan	8177	9615	10230	1438	18	615	6
Other states	11484	11872	15966	388	3	4094	34

Source: Statistical Office of Estonia

Table 5. Average length of stay in Tallinn, 1995-2001

	1995	1996	1997	1998	1999	2000	2001
Foreign	1.8	1.7	1.5	1.5	1.4	1.4	1.5
Domestic	2.2	1.8	1.8	1.8	1.4	1.4	1.5

Source: Statistical Office of Estonia

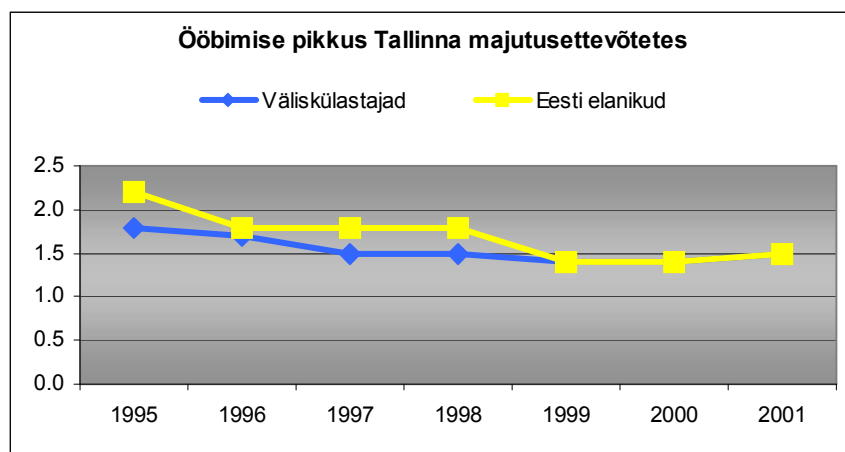


Table 6. Accommodation facilities in Tallinn

	1996	1997	1998	1999	2000	2001
Facilities	28	27	36	45	55	
Rooms	1955	1950	2245	3061	3078	
Beds	3410	3206	4018	5671	5606	
Room occupancy %	56	67	68	61	65	67
Bed occupancy %	45	51	51	47	51	49
Average room rate EEK	496	530	550	544	528	548

Source: Statistical Office of Estonia, Tallinn City Tourist Office

Motivation

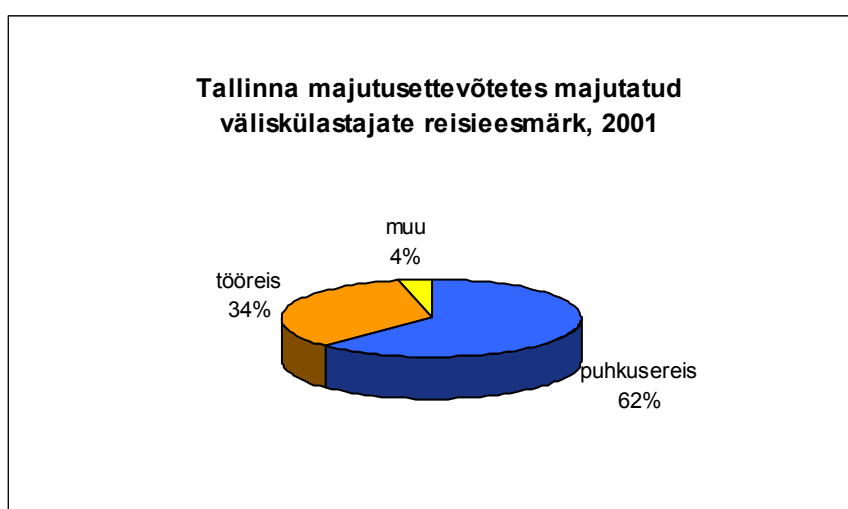
Since 1996 very little has changed in the visitor motivation to choose Tallinn as the destination – in 2001 almost 2/3 of foreigners arrived to Tallinn for leisure and holiday, 1/3 for business and 4% to pursue other reasons.

Quite obviously the peak of the holiday travel is summer with shoulder seasons in autumn and spring and very little holidaymakers in the beginning of the year. On the other hand business trips are spread evenly with QII, III and IV dominating, but the first couple of months are very quiet in business as well.

Table 7. Visitor motivation of accommodated foreign tourists (%), 1998-2001

	1998	1999	2000	2001
Holiday	62.0	63.5	63.5	62.5
Business	33.0	33.5	34.0	34.0
Other	5.0	3.0	2.5	3.5

Source: Statistical Office of Estonia



Tourism revenue

It is estimated that Tallinn amounts to 80% of total export of tourism services in Estonia. Still, the pace has stalled (2000-2001 increase 3.4 %) and for the first time CPI increase (6%) had the upper hand.

Table 8. Export of tourism services in Tallinn (EEK 1000), 1996-2001

	1996	1997	1998*	1999	2000	2001
Export of tourism services (EEK)	4669	5285	6011	6466	6880	7117
Change %		13	13.7	7.5	6.4	3.4
Change in CPI %		11.2	8.2	3.3	4	6

Source: Bank of Estonia

