

TOURISM IN TALLINN SEPTEMBER 2010

In September 2010, 184,600 tourists stayed in Estonian accommodation establishments, 58% of whom stayed in Tallinn.

Arrivals in Tallinn: 106,800 (+21%)*
Bednights in Tallinn: 184,800 (+23%)

- **Foreign tourists: 93,900 (+20%)**
Bednights of foreign tourists: 163,700 (+21%)
- **Domestic tourists: 12,900 (+34%)**
Bednights of domestic tourists: 21,200 (+48%)

Bednights of primary markets increased

Finland: 64,200 nights (+29%)
Germany: 12,400 nights (+8%)
Russia: 11,900 nights (+50%)
Sweden: 9,000 nights (+5%)
Norway: 9,000 nights (+5%)
Great Britain: 7,500 nights (+16%)
USA: 5,000 nights (+55%)
Latvia: 4,700 nights (+19%)
Italy: 3,600 nights (+27%)
Spain: 3,600 nights (+10%)
France: 2,700 nights (-12%)
Japan: 1,400 nights (-13%)
Belgium: 1,300 nights (+9%)
China: 500 nights (+138%)

Business travel clearly up

72% of **foreign tourists** stay in Tallinn for leisure purposes, 21% for business (incl. 1% a conference travel) and 1% visits for other purposes.

52% of **domestic tourists** visit for leisure 37% for business purposes, 9% for attending conferences and 2% for other purposes.

* comparison September 2009, %

Rise in length of stay

The average length of stay for tourists was 1.73 nights (+2%).

Stays by domestic tourists: 1.64 nights (+10%), foreign tourists: 1.74 nights (+1%).

Room occupancy rates up, but average price of bednights** decreased

363 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 56%, 12 percentage points higher than in September of the previous year.

The average cost of a bednight in an accommodation establishment was 538 kroons, which is 5% less expensive compared to September 2009.

Travelers by air and by sea increased

134,415 passengers passed through **Tallinn Airport** in September (+13%).

Passengers in **Tallinn Old Harbour** totalled **588,764 (+11%)**, of whom 85% were on the Tallinn-Helsinki line, 10% on the Tallinn-Stockholm line and 5% cruise passengers. 24 cruise ships visited Tallinn in September.

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

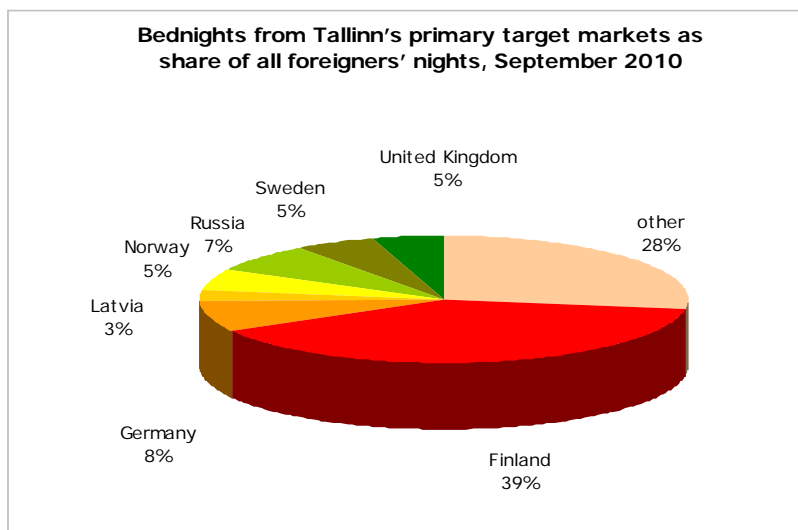
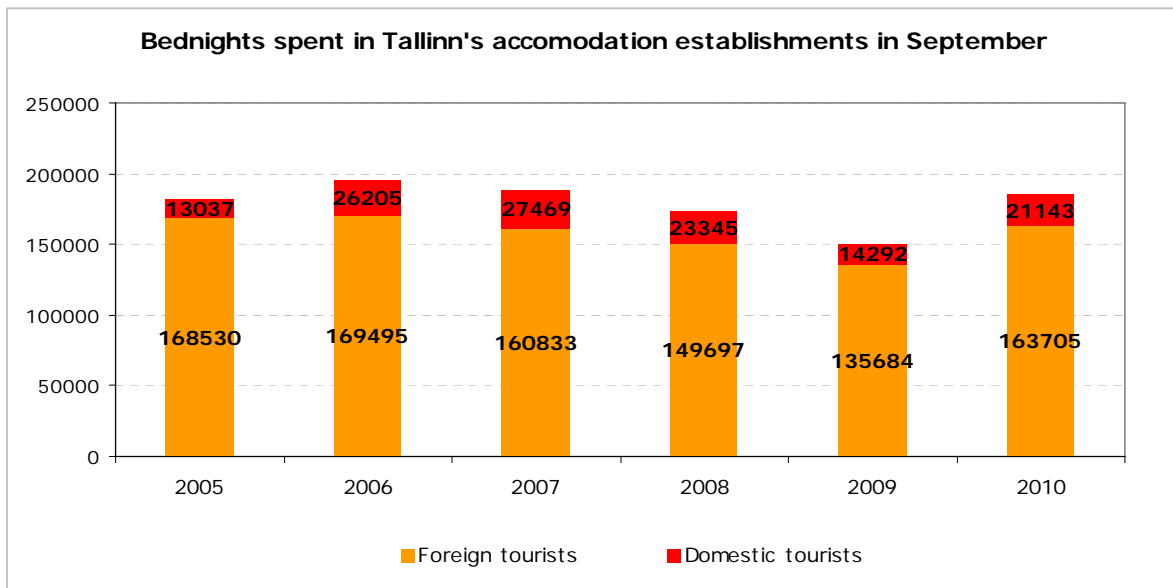
11,700 visitors (-25%) visited Tallinn's two tourism information centers. Tallinn tourism portal received 72,000 visits in September, i.e. 17% more than in September 2009.

** 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

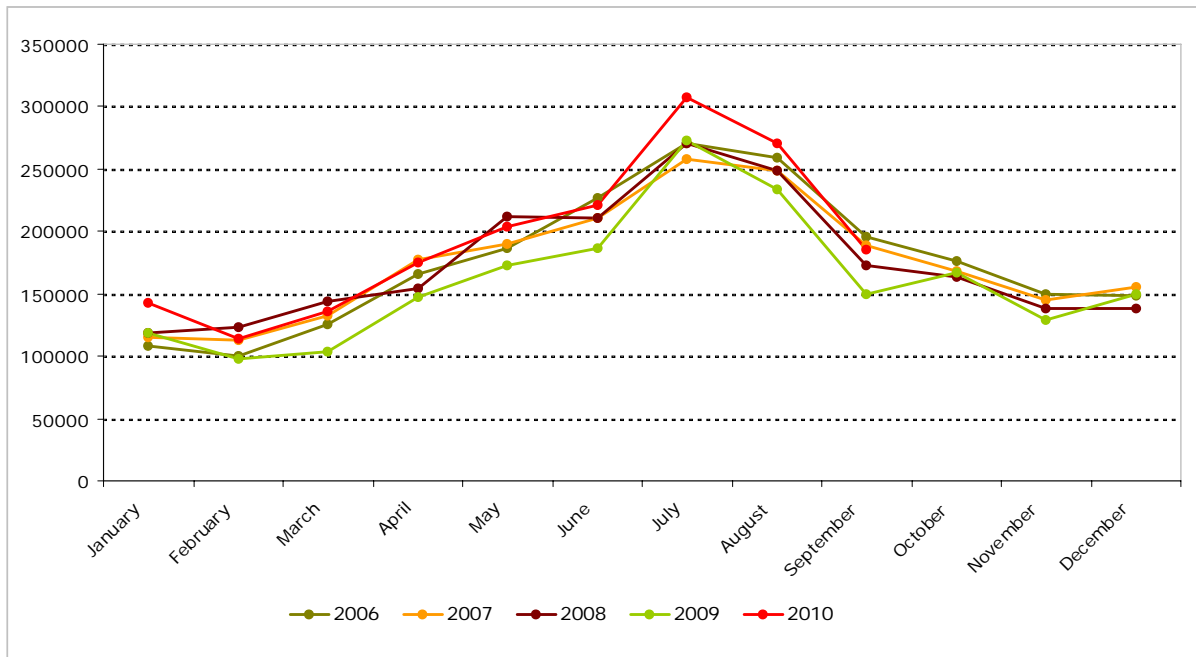
A total of 106,800 tourists stayed in Tallinn’s accommodation establishments (+21% more tourists compared with same month in 2009). Altogether a total of 93,900 foreign tourists used the services of accommodation establishments (+20%). The number of domestic tourists also increased, numbers accommodated rose 34%, for a total of 12,900. The current year in tourists’ numbers is expected to be better than the previous record year in 2008. The number of tourists at accommodation establishments was up 13 percent year-on-year for the period January-September.

Bednights spent by tourists also rose, with a total of 184,800 bednights (+23%) spent in Tallinn’s accommodation establishments. Bednights by foreign tourists rose by 21% (totalling 163,700 bednights) and bednights by Estonian residents were up by 48% (total 21,200 bednights). Compared the period January-September to same period in 2009, the number of bednights grew 18% altogether (both foreign and domestic), or by 270,200 tourists.

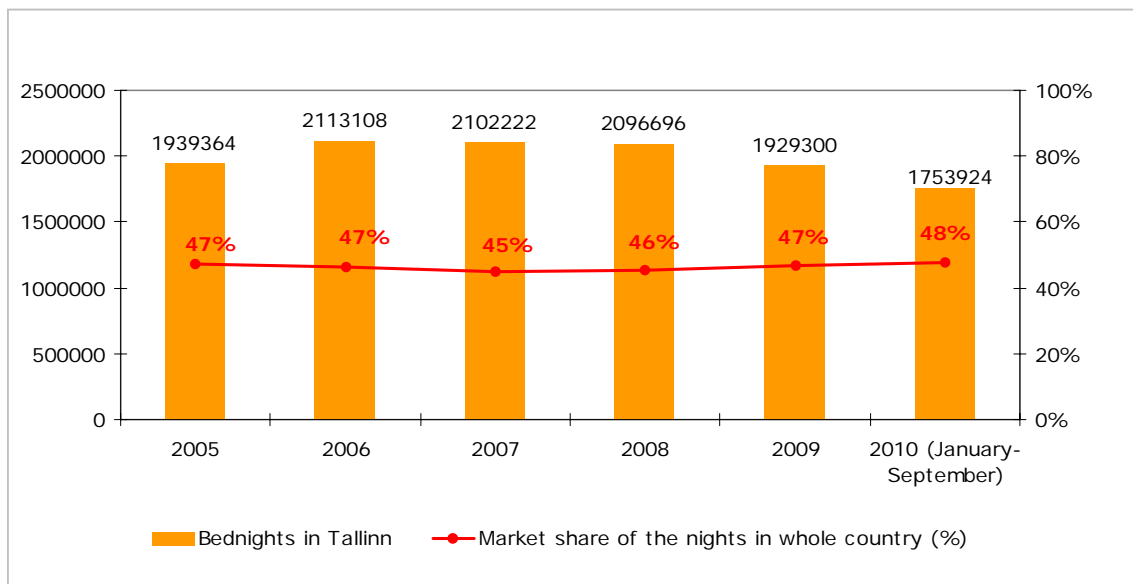


Source: Statistics Estonia

Monthly bednights in Tallinn



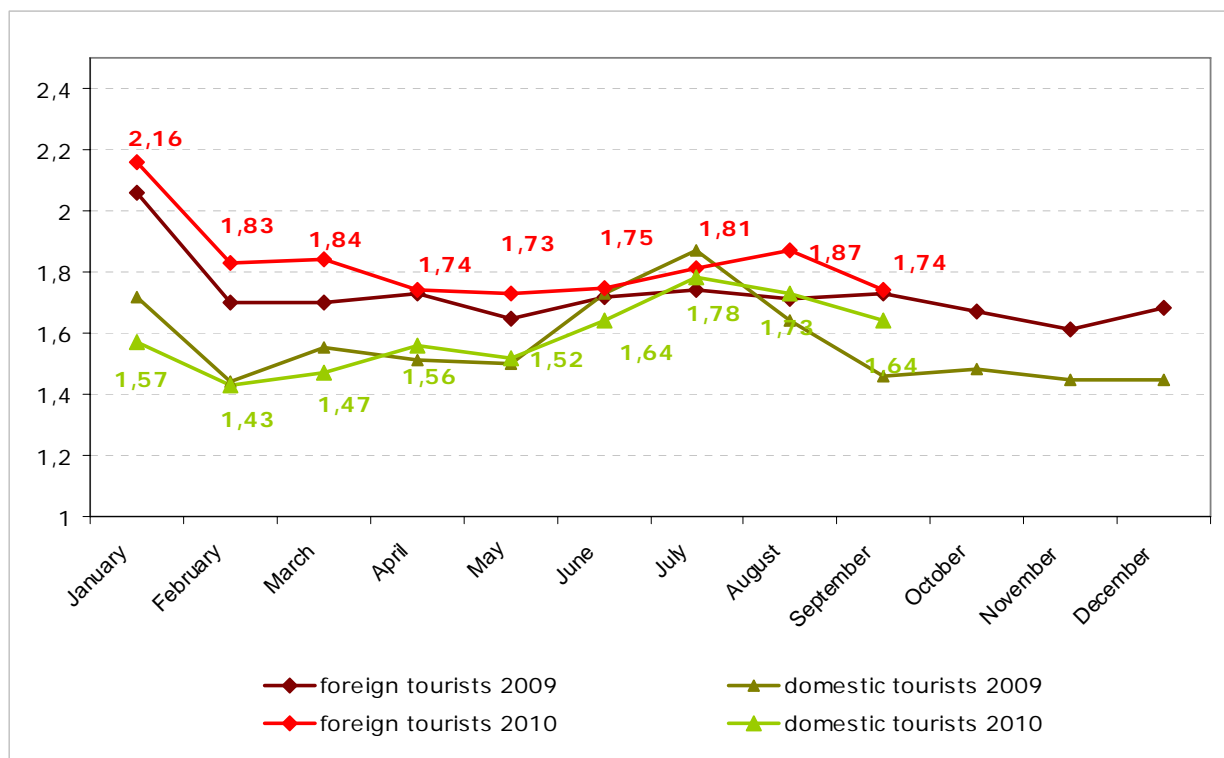
Total bednights in Tallinn and market share of the bednights in Estonia



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 (January-September)	1 753 924	48%	+ 270 170	+18%

Excluding day traveller, visitors spent an average of 1.73 nights in September (+2%). The average trip length among domestic tourists rose by 10%, from 1.48 to 1.64 nights. The length of stay for foreign tourists was 1.74 nights (+1%). In September among Tallinn's primary markets, Norwegian tourists spent the longest time (2.23 nights) and Latvians spent the shortest time (1.41 nights).



Source: Statistics Estonia

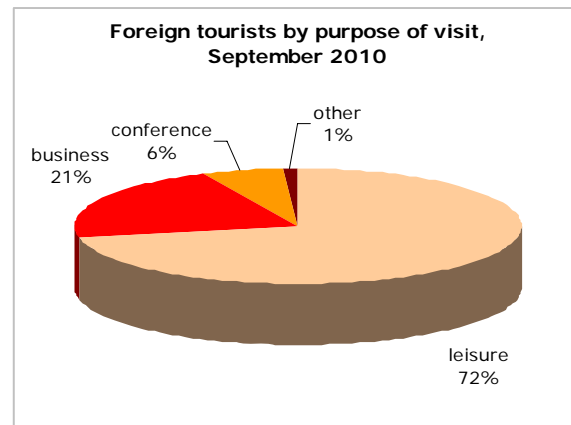
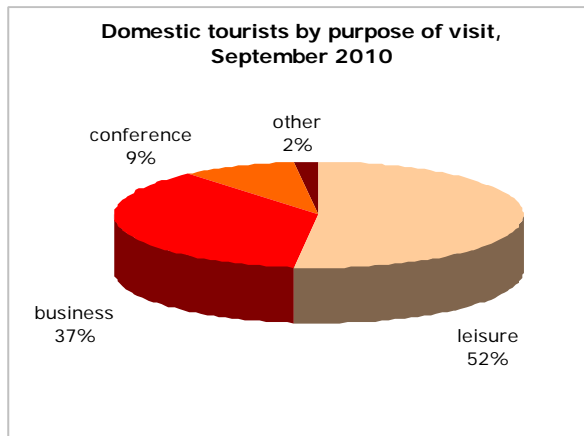
Arrivals, numbers of bednights and length of stay in September 2010

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of Stay
		Number	%		Number	%	
Albania	16	13	433	85	76	844	5,31
Austria	343	-264	-43	898	-438	-33	2,62
Belgium	589	52	10	1 301	105	9	2,21
Bulgaria	90	33	58	150	5	3	1,67
Croatia	74	47	174	162	114	238	2,19
Czech Republic	335	74	28	926	214	30	2,76
Cyprus	36	-27	-43	162	6	4	4,50
Denmark	1037	-118	-10	2 045	-209	-9	1,97
Finland	43 000	6 607	18	64 162	14 242	29	1,49
France	1 059	-303	-22	2 718	-358	-12	2,57
Germany	6 485	1 092	20	12 383	860	7	1,91
Greece	283	106	60	672	155	30	2,37
Hungary	162	65	67	585	314	116	3,61
Iceland	54	13	32	130	37	40	2,41
Ireland	170	-7	-4	391	-38	-9	2,30
Italy	1 566	428	38	3 616	762	27	2,31
Latvia	3 349	634	23	4 736	742	19	1,41
Lithuania	1 871	258	16	2 831	11	0	1,51
Luxembourg	40	-30	-43	64	-60	-48	1,60
Malta	33	9	38	56	-19	-25	1,70
Netherlands	764	28	4	1 610	-63	-4	2,11
Norway	3 982	649	19	8 898	451	5	2,23
Poland	1 627	455	39	2 968	584	24	1,82
Portugal	125	-106	-46	510	-29	-5	4,08
Romania	109	42	63	223	92	70	2,05
Russia	6 187	1 504	32	11 895	3 296	38	1,92

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of stay
		Number	%		Number	%	
Slovakia	316	225	247	693	445	179	2,19
Slovenia	70	-16	-19	130	-194	-60	1,86
Spain	1 603	96	6	3 587	305	9	2,24
Sweden	5 713	627	12	8 981	433	5	1,57
Switzerland	566	217	62	1 185	498	72	2,09
Turkey	417	97	30	1 309	653	100	3,14
Ukraine	509	304	148	917	469	105	1,80
United Kingdom	3 538	729	26	7 525	1 008	15	2,13
Other European countries	1 565	104	7	2 884	212	8	1,84
Total Africa	114	-57	-33	220	-62	-22	1,93
..South Africa	49	32	188	66	32	94	1,35
Total Asia	1 651	-33	-2	3 032	-31	-1	1,84
..China	339	181	115	544	315	138	1,60
..Japan	815	-58	-7	1 436	-209	-13	1,76
..South-Korea	92	-160	-63	149	-140	-48	1,62
United States	2 205	763	53	4 952	1 748	55	2,25
Canada	279	44	19	600	-104	-15	2,15
Total Central and South America	357	114	47	704	264	60	1,97
..Brasilia	215	99	85	460	218	90	2,14
Australia, Oceania	471	54	13	1 144	242	27	2,43
..Australia	400	39	11	947	194	26	2,37
Other countries	1 143	902	374	1 665	1283	336	1,46
Total foreign tourists	93 903	15 424	20	163 705	28 021	21	1,74
Domestic tourists	12 905	3 276	34	21 143	6 851	48	1,64
Countries of residence total	106 808	18 700	21	184 848	34 872	23	1,73

Source: Statistics Estonia

Tourists by purpose of visit



	Leisure	Share, %	Business	Share, %	Conference	Share, %	Other purpose	Share, %
2005	793 361	70	245 758	22	50 652	4	41 441	4
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 (January-September)	742 062	76	199 526	20	27 437	3	9 539	1

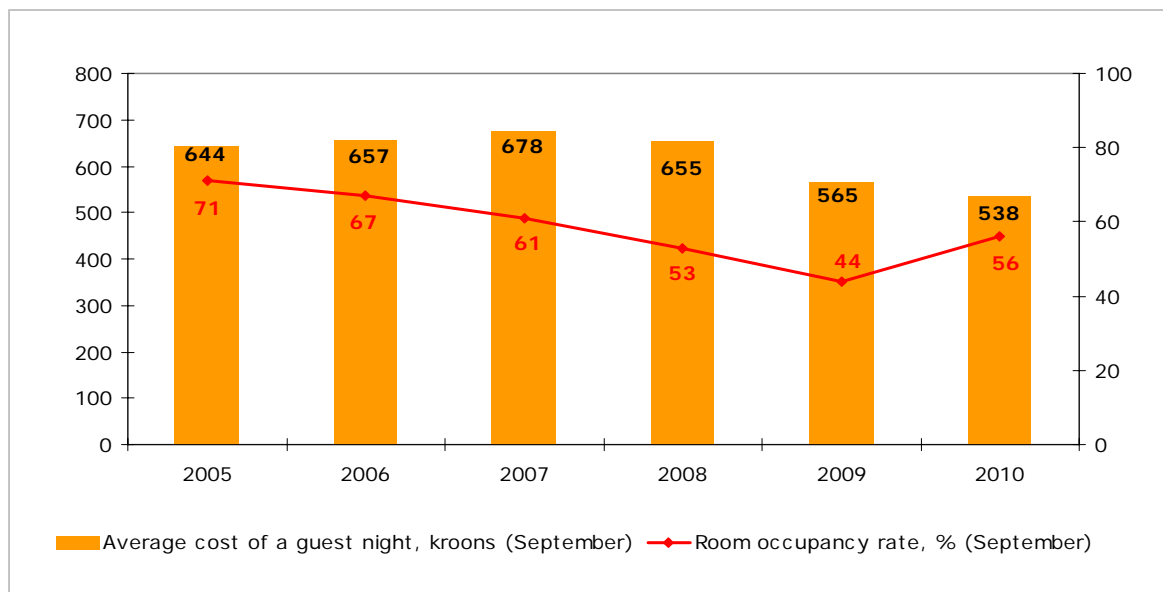
Source: Statistics Estonia

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

Source: Tallinn City Tourist Office & Convention Bureau

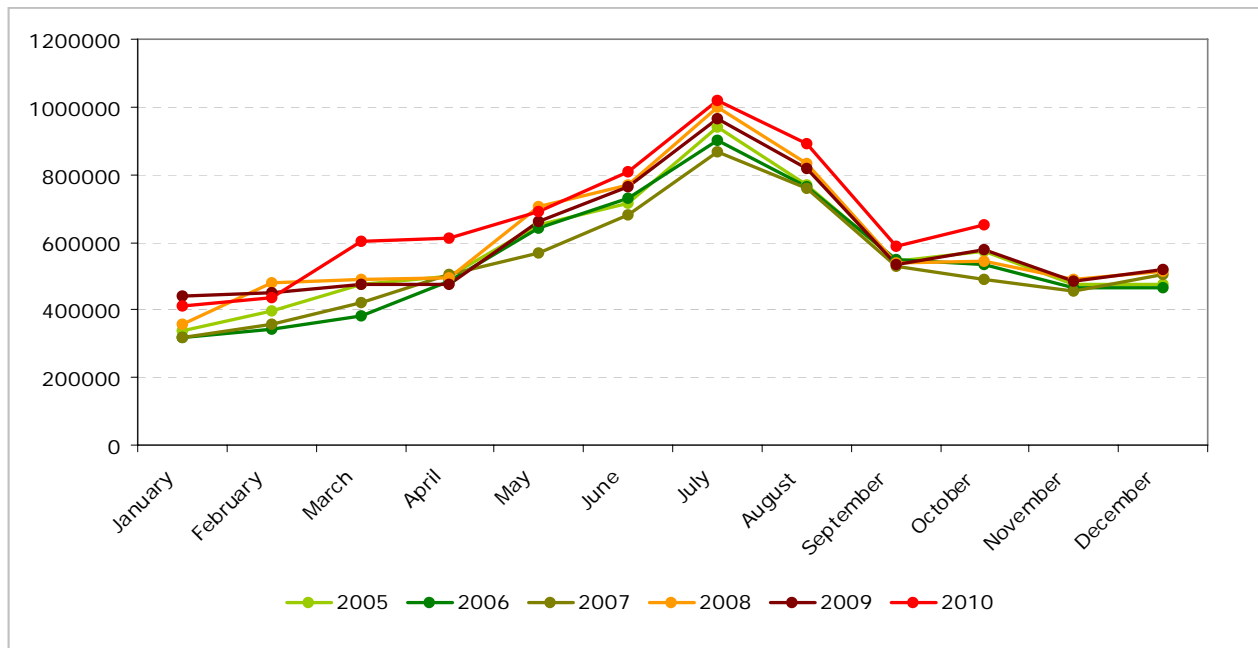
The average price of accommodation and room occupancy rate in Tallinn (in September 2005-2010)



	Room occupancy rate, %	Average cost of a guest night, kroons
2005	60	582
2006	58	598
2007	55	604
2008	50	601
2009	44	529
2010 (January-September)	53	486

Source: Statistics Estonia

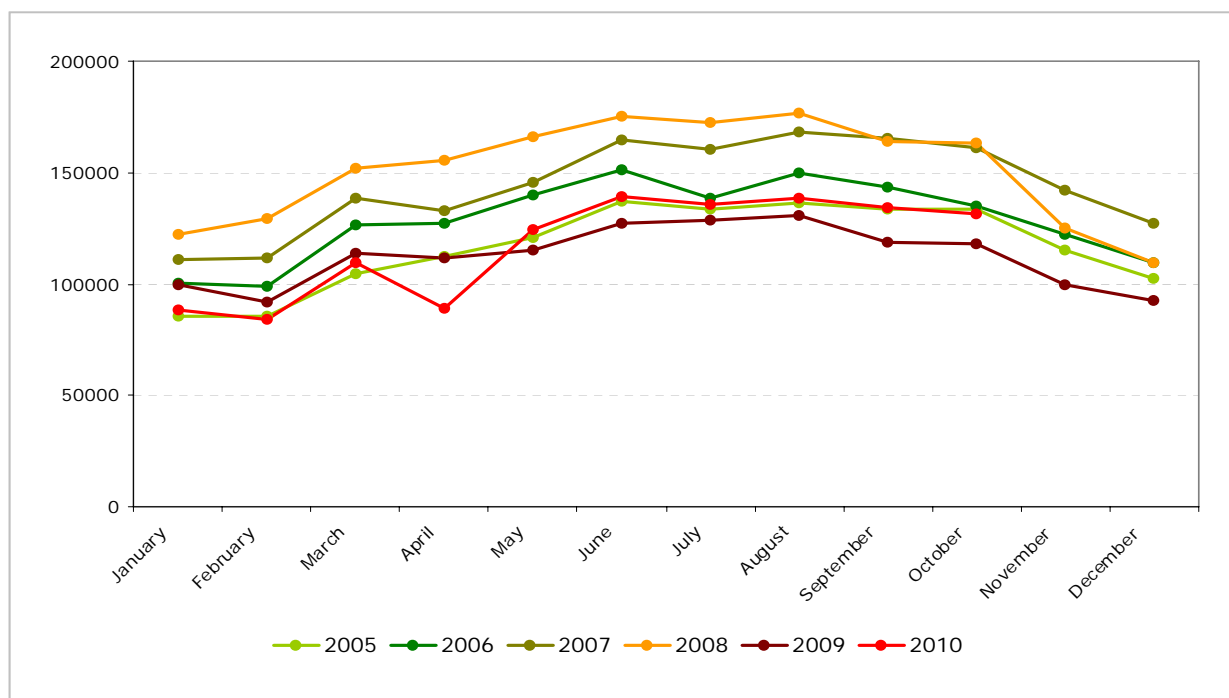
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2010)



	2005	2006	2007	2008	2009	2010	Change % (2009/2010)
January	335 542	317 906	319 553	356 507	439 487	412 711	-6
February	397 081	344 921	358 564	478 666	448 896	434 032	-3
March	477 031	384 313	420 027	491 421	476 198	600 859	+26
April	499 676	484 488	502 471	495 746	547 671	610 230	+11
May	650 616	643 331	568 050	705 944	663 183	690 167	+4
June	713 230	728 524	682 167	770 423	764 941	808 148	+6
July	940 806	902 446	867 053	1 000 901	963 521	1 021 206	+6
August	769 703	765 062	758 731	832 229	816 245	893 876	+10
September	544 459	550 915	531 333	537 336	532 226	588 764	+11
October	574 767	534 187	490 097	542 484	577 465	653 824	+13
November	475 588	464 972	457 763	490 214	486 677		
December	476 450	466 503	502 435	512 471	518 976		
TOTAL	6 854 949	6 587 568	6 458 244	7 214 342	7 235 486	6 713 817	

Source: Port of Tallinn

Passenger air traffic at Tallinn Airport (2005-2010)



	International			Domestic			Total		
	2009	2010	change (%)	2009	2010	change (%)	2009	2010	change (%)
January	97 675	86 693	-11	1 666	1 835	+10	99 341	88 528	-11
February	90 295	82 600	-8	1 415	1 340	-5	91 710	83 940	-9
March	111 982	107 692	-4	1 645	1 591	-3	113 629	109 283	-4
April	109 859	87 644	-21	1 525	1 157	-24	113 627	88 801	-21
May	113 410	122 758	+8	1 866	1 956	+5	115 276	124 714	+8
June	124 801	137 187	+10	2 257	2 328	+1	127 058	139 515	+10
July	125 580	132 367	+5	2 754	3 386	+23	128 334	135 762	+6
August	128 283	135 267	+5	2 367	2 999	+27	130 650	138 266	+6
September	116 964	131 918	+13	1 723	2 465	+43	118 687	134 383	+13
October	116 175	129 487	+11	1 733	2 247	+30	117 908	131 734	+12
November	98 001			1 754			99 755		
December	90 882			1 624			92 506		
TOTAL	1 323 907	1 153 622		22 329	21 304		1 346 236	1 174 926	

Source: Tallinn Airport

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