

TOURISM IN TALLINN November 2009

In November 2009, 139,600 tourists stayed in Estonian accommodation establishments, 58% of whom stayed in Tallinn.

Arrivals in Tallinn: 81,200 (-6%)*
Bednights in Tallinn: 129,200 (-7%)

- **Foreign tourists: 69,100 (-5%)**
Bednights of foreign tourists: 111,600 (-5%)
- **Domestic tourists: 12,100 (-11%)**
Bednights of domestic tourists: 17,600 (-14%)

Great Britain market up in November

Primary markets:

Finland: 56,700 nights (0%)
Russia: 10,400 nights (-11%)
Norway: 7,000 nights (-18%)
Sweden: 5,800 nights (-12%)
Great Britain: 5,200 nights (+9%)
Latvia: 3,900 nights (-13%)
Germany: 2,900 nights (-21%)

Secondary markets:

Italy: 1,600 nights (-2%)
France: 1,400 nights (+30%)
USA: 1,200 nights (-13%)
Belgium: 700 nights (+28%)
Spain: 600 nights (-22%)
China: 400 nights (-20%)
Japan: 300 nights (-24%)

Length of stay remains almost unchanged

The average length of stay for tourists was 1.59 nights (-1%).

Stays by foreign tourists: 1.61 nights (0%)
Domestic tourists: 1.45 nights (-3%)

* comparison November 2008, %

Among primary markets, Norwegian tourists stay the longest (2.46 nights), and Finish tourists spent the shortest time (1.34 nights).

71% of accommodated tourists arrived for holidays, large decrease in conference travel

73% of foreign tourists stay in Tallinn for leisure purposes, 21% for business, 4% for attending a conference and 2% for other purposes.

59% of domestic tourists visit for leisure purposes, 36% for business, 3% for attending conferences and 2% for other purposes.

Room occupancy rates and average price of bednights** decreased

In November 418 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 39%, 4 percentage points lower than in November of the previous year.

The average cost of a bednight in an accommodation establishment was 511 kroons, which is 17% (103 kroons) less expensive compared to November 2008.

Decline in passengers in air and sea travel

The number of passengers at **Tallinn Airport** was 99,800, down 20% compared with November the year before.

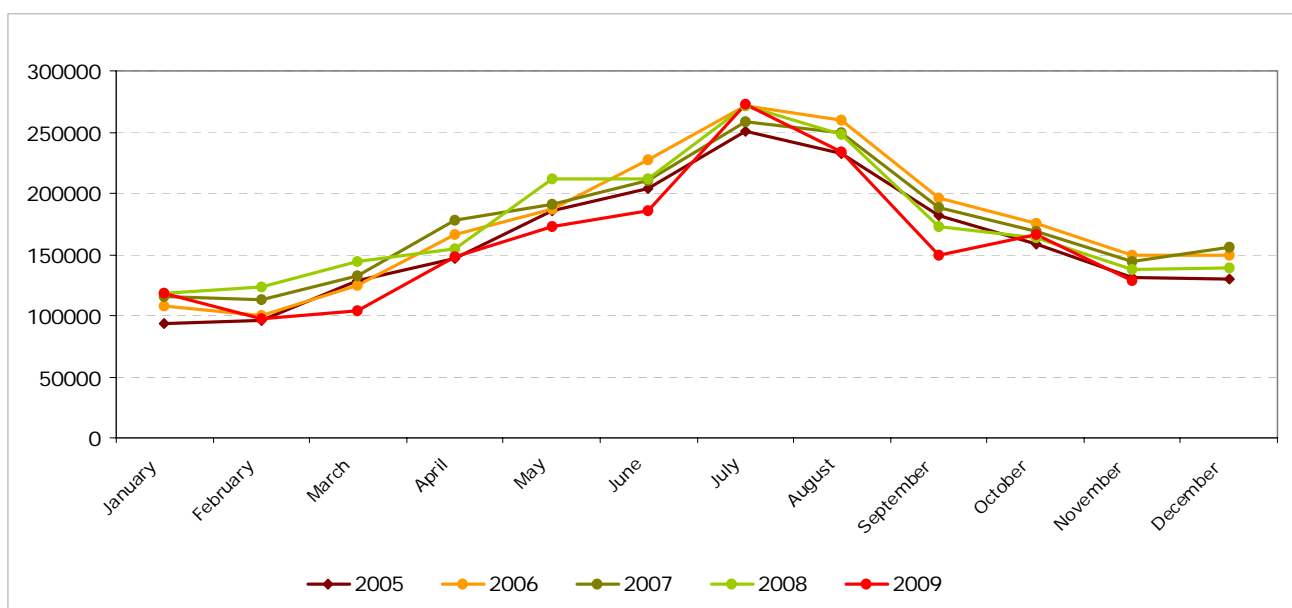
The number of passengers passing through the **Tallinn Old Harbour** totaled 488,700, down by 1% compared with November last year.

** 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.

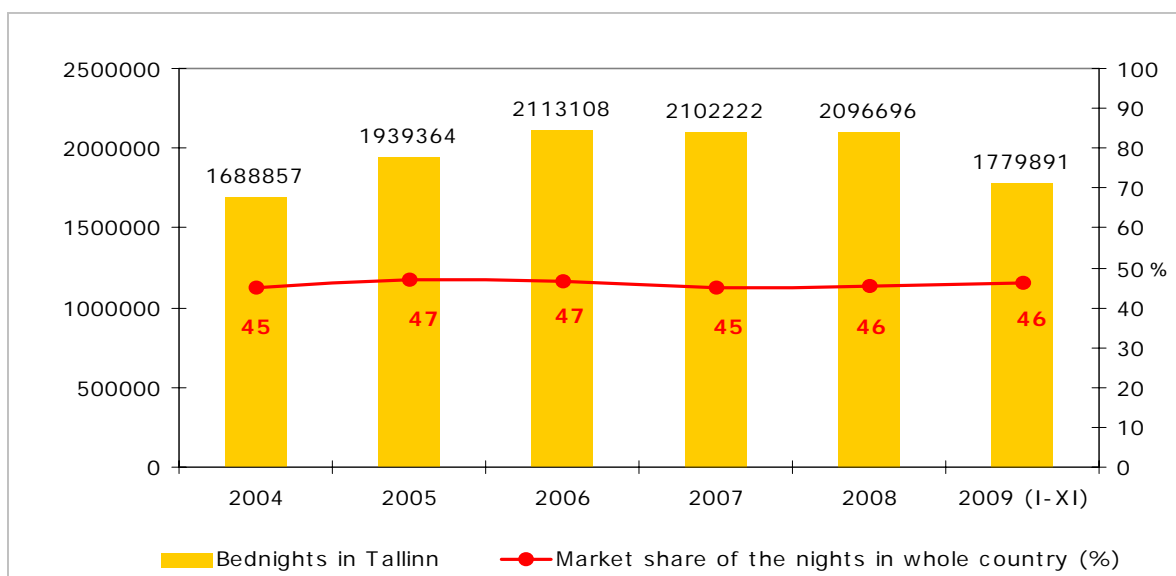
Tourists staying in Tallinn’s accommodation establishments

During the period from January to November 2009, a total of **1,044,800** tourists stayed in Tallinn’s accommodation establishments (6% less tourists compared with same period in 2008). Altogether a total of **921,300 foreign tourists** used the services of accommodation establishments (-4% or 34,100 tourists). The number of **domestic tourists** decreased somewhat, numbers accommodated fell 19%, by 29,700 tourists, for a total of **123,600**. Bednights spent by tourists also shrank during the first eleven months, with a total of **1,779,900 bednights (-9%)** spent in Tallinn’s accommodation establishments. While **bednights by foreign tourists shrank by 6%** (totalling 1,584,400 bednights), **bednights by Estonian residents were down by 26%** (total 195,500 bednights).

Monthly bednights in Tallinn



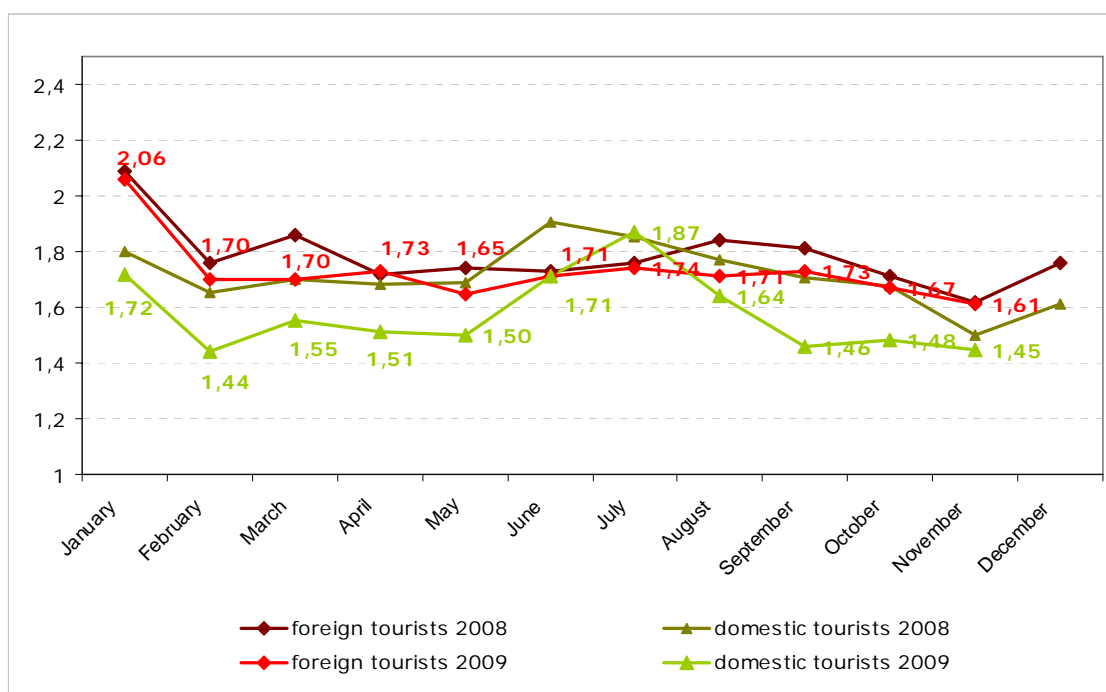
Total bednights in Tallinn and market share of the bed-nights in Estonia



	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 (January-November)	1 779 891	46 %	-178 077	-9%

In the period from January to November 2009 the **average length of stay** continued to decline and it was **1.70 nights (-4%)**. The longest stays in Tallinn were in January and July, and the shortest were in October and November. Compared to the previous year, the average length of stay decreased the most in October.

During the first eleven months the average trip length among **foreign tourists** shortened by 3%, from 1.77 to 1.72 nights. The length of stay for **domestic tourists** decreased even more, from 1.72 to 1.58 nights, or 8 percentage points.



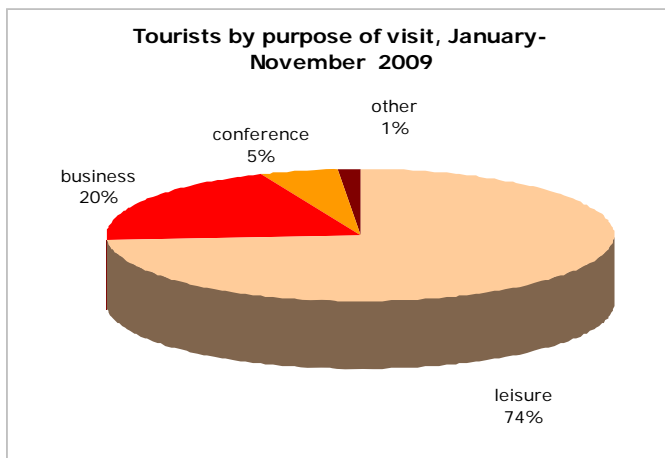
Arrivals, numbers of bed-nights and length of stay in November 2009

Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Albania	37	4	12	160	104	186	4,32
Austria	176	-19	-10	371	-50	-12	2,11
Belgium	260	-22	-8	672	147	28	2,58
Bulgaria	82	5	6	559	406	265	6,82
Croatia	20	10	100	160	104	186	4,32
Czech Republic	219	38	21	44	26	144	2,20
Cyprus	35	25	250	443	-53	-11	2,02
Denmark	527	-115	-18	111	58	109	3,17
Finland	42 223	-1187	-3	56 709	-235	0	1,34
France	591	121	26	1 392	321	30	2,36
Germany	1 298	-309	-19	2 876	-754	-21	2,22
Greece	160	101	171	347	190	121	2,17
Hungary	108	9	9	256	76	42	2,37
Iceland	46	5	12	95	37	64	2,07
Ireland	139	31	29	303	-15	-5	2,18
Italy	578	-89	-13	1 554	-24	-2	2,69
Latvia	2 526	-426	-14	3 948	-590	-13	1,56
Lithuania	1 284	-386	-23	2 310	-752	-25	1,80
Luxembourg	40	0	0	75	1	1	1,88
Malta	15	10	200	33	21	175	2,20
Netherlands	483	86	22	954	211	28	1,98
Norway	2 849	-689	-19	7 010	-1 502	-18	2,46
Poland	584	-180	-24	1 128	-414	-27	1,93
Portugal	97	34	54	325	-99	-23	3,35
Romania	30	-43	-59	48	-104	-68	1,60
Russia	5 379	-552	-9	10 405	-1223	-11	1,93

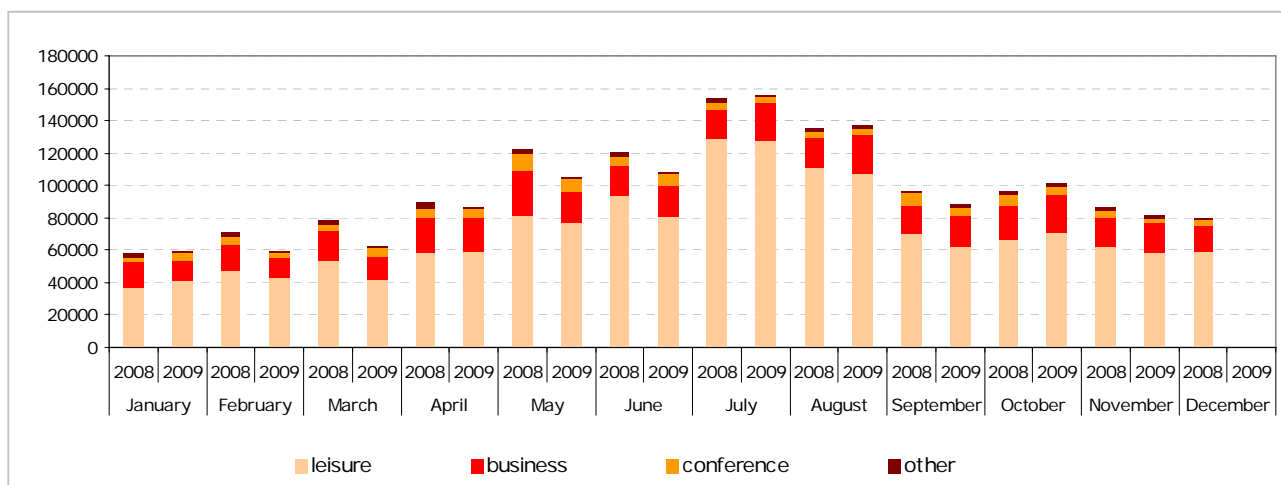
Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Slovakia	41	-5	-11	139	2	1	3,39
Slovenia	25	-6	-19	41	-39	-49	1,64
Spain	278	-73	-21	614	-171	-22	2,21
Sweden	3 561	-151	-4	5 808	-789	-12	1,63
Switzerland	269	73	37	421	110	35	1,57
Turkey	113	-22	-16	315	-7	-2	2,79
Ukraine	232	-109	-32	576	-346	-38	2,48
United Kingdom	2 320	246	12	5 230	421	9	2,25
Other European countries	688	-394	-36	1 596	-848	-35	2,32
Total Africa	52	0	0	111	-58	-34	2,13
..South Africa	22	9	69	41	20	95	1,86
Total Asia	689	99	17	1 303	-99	-7	1,89
..China	198	86	77	400	-100	-20	2,02
..Japan	180	-55	-23	311	-98	-24	1,73
..South-Korea	45	8	22	84	19	29	1,87
United States	555	-49	-8	1 223	-181	-13	2,20
Canada	117	8	7	242	-23	-9	2,07
Total Central and South America	68	10	17	117	-2	-2	1,72
..Brasilia	33	20	154	68	41	152	2,06
Australia, Oceania	126	-20	-14	289	-69	-19	2,29
..Australia	89	-25	-22	225	-65	-22	2,53
Other countries	213	211	10550	457	452	9040	2,15
Domestic tourists	12 112	-1 552	-11	17 567	-2 944	-14	1,45
Total foreign tourists	69 133	-3 720	-5	111 606	-6 131	-5	1,61
Countries of residence total	81 245	-5 272	-6	129 173	-9 075	-7	1,59

Source: Statistics Estonia

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 (January-November)	769 032	74	208 380	20	52 101	5	15 339	1



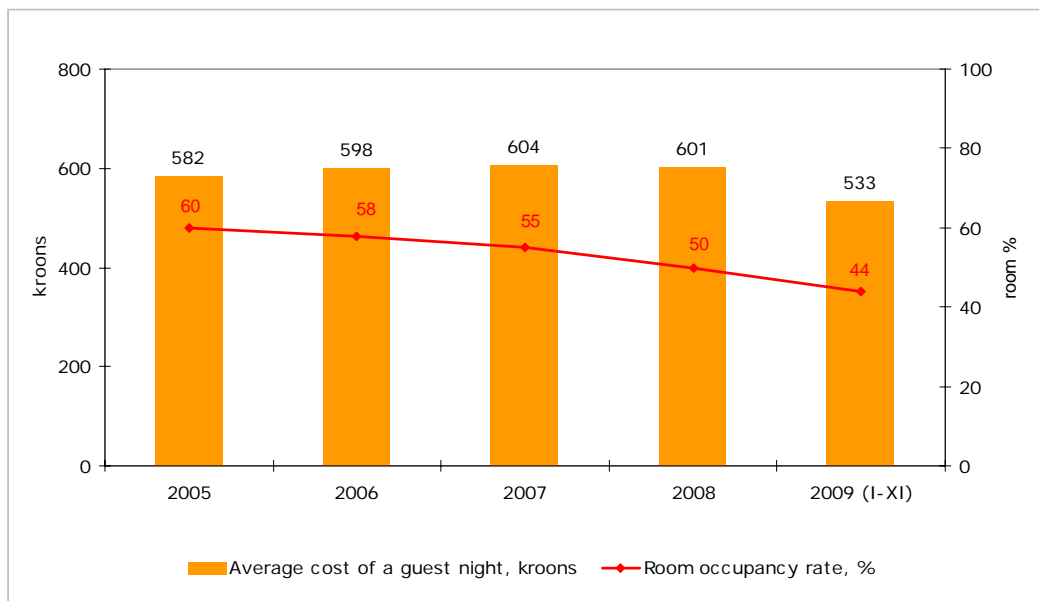
Source: Statistics Estonia

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 (01.11.2009)	56	418	6 444	7 510	12 599	15 164

Source: Tallinn City Tourist Office & Convention Bureau

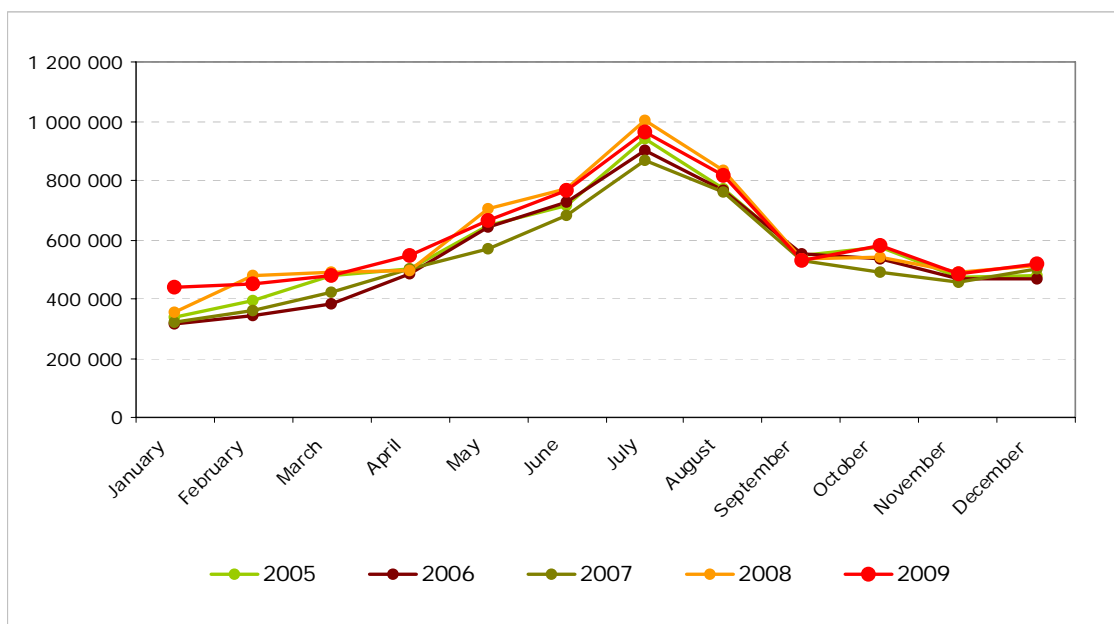
The average price of accommodation and room occupancy rate in Tallinn



	Room occupancy rate, %	Average cost of a guest night, kroons
2005	60	582
2006	58	598
2007	55	604
2008	50	601
2009 (January-November)	44	533

Source: Statistics Estonia

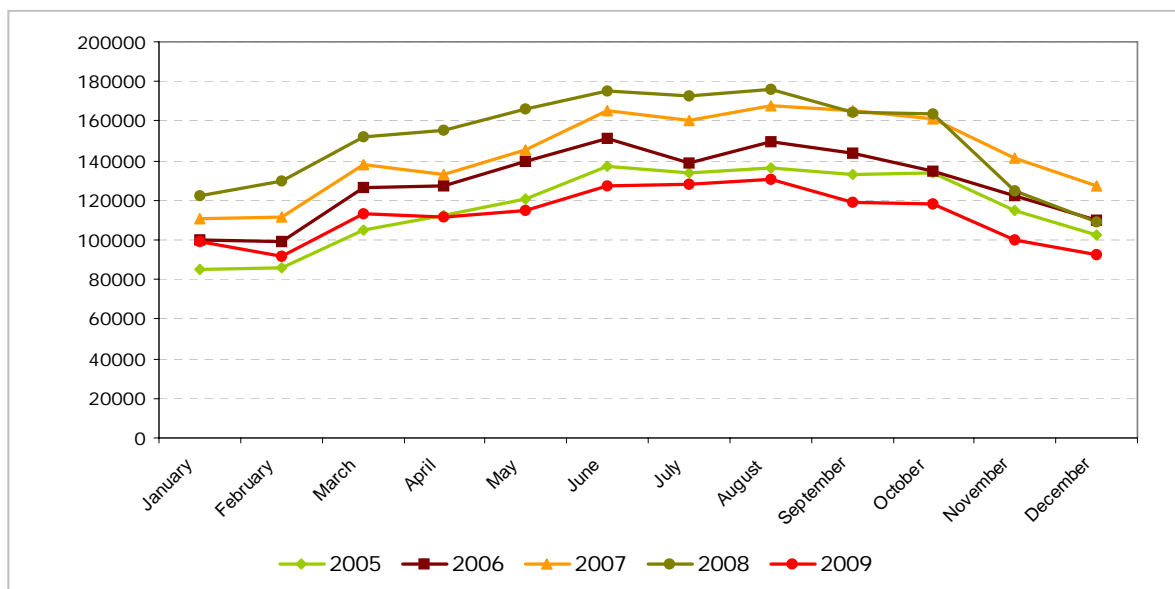
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2009)



	2005	2006	2007	2008	2009	Change (2008/2009)
January	335 542	317 906	319 553	356 507	439 487	+23 %
February	397 081	344 921	358 564	478 666	448 896	-6%
March	477 031	384 313	420 027	491 421	476 198	-3%
April	499 676	484 488	502 471	495 746	547 671	+11%
May	650 616	643 331	568 050	705 944	663 183	-6%
June	713 230	728 524	682 167	770 423	764 941	-1%
July	940 806	902 446	867 053	1 000 901	963 521	-4%
August	769 703	765 062	758 731	832 229	816 245	-2%
September	544 459	550 915	531 333	537 336	532 226	-1%
October	574 767	534 187	490 097	542 484	577 465	+6%
November	475 588	464 972	457 763	490 214	486 677	-1%
December	476 450	466 503	502 435	512 471	518 976	1%
TOTAL	6 854 949	6 587 568	6 458 244	7 214 342	7 235 486	0%

Source: Port of Tallinn

Passenger air traffic at Tallinn Airport (2005-2009)



	International			Domestic			Total		
	2008	2009	change (%)	2008	2009	change (%)	2008	2009	change (%)
January	121 029	97 675	-19	1 338	1 666	25	122 367	99 341	-19
February	128 233	90 295	-30	1 123	1 415	26	129 356	91 710	-29
March	150 601	111 982	-26	1 492	1 645	10	152 093	113 629	-25
April	153 504	109 859	-28	1 629	1 525	-6	155 133	113 627	-28
May	164 018	113 410	-31	1 953	1 866	-5	165 971	115 276	-30
June	173 145	124 801	-28	2 167	2 257	4	175 312	127 058	-28
July	170 046	125 580	-26	2 677	2 754	3	172 723	128 334	-26
August	174 069	128 283	-26	2 339	2 367	1	176 408	130 650	-26
September	162 538	116 964	-28	1 739	1 723	-1	164 277	118 687	-28
October	161 162	116 175	-28	2 276	1 733	-24	163 438	117 908	-28
November	123 919	98 001	-21	1 205	1 754	46	125 124	99 755	-20
December	107 799	90 882	-16	1 535	1 624	6	109 334	92 506	-15
TOTAL	1 790 063	1 323 907	-26	21 473	22 329	4	1 811 536	1 346 236	-26

Source: Tallinn Airport

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