

TOURISM IN TALLINN

March 2010

In March 2010, 136,600 tourists stayed in Estonian accommodation establishments, 56% of whom stayed in Tallinn.

Arrivals in Tallinn: 76,100 (+22%)*
Bednights in Tallinn: 135,800 (+30%)

- **Foreign tourists: 64,900 (+24%)**
Bednights of foreign tourists: 119,300 (+35%)
- **Domestic tourists: 11,200 (+11%)**
Bednights of domestic tourists: 16,500 (+6%)

Growth in bednights continues

Finland: 59,400 nights (+39%)
Russia: 10,200 nights (+43%)
Sweden: 5,900 nights (+10%)
Great Britain: 5,700 nights (+24%)
Norway: 5,400 nights (+1%)
Germany: 4,600 nights (+62%)
Latvia: 4,000 nights (+30%)

USA: 2,200 nights (+67%)
France: 1,900 nights (+72%)
Spain: 1,600 nights (+141%)
Italy: 1,500 nights (+1%)
Belgium: 500 nights (-18%)
Japan: 400 nights (-8%)
China: 300 nights (+160%)

Leisure travel continue to rise

74% of **foreign tourists** stay in Tallinn for leisure purposes, 21% for business, 3% for attending a conference and 2% for other purposes.

56% of **domestic tourists** visit for leisure purposes, 36% for business, 5% for attending conferences and 3% for other purposes.

* comparison March 2009, %

Rise in length of stay

The average length of stay for tourists was 1.78 nights (+7%).

Stays by domestic tourists: 1.47 nights (-5%),
 Foreign tourists: 1.84 nights (+8%).

Among primary markets, German tourists spent the longest time in Tallinn (2.82 nights), and Latvians spent the shortest time (1.49 nights).

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

354 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 40%, 9 percentage points higher than in March of the previous year.

The average cost of a bednight in an accommodation establishment was 472 kroons, which is 12% less expensive compared to March 2009.

Travellers by air decrease, but by sea increased

109,280 passengers passed through **Tallinn Airport** in March 2010 (-4%).

Passengers in **Tallinn Old Harbour** totalled **600,900 (+26%)**, of whom 87% were on the Tallinn-Helsinki line and 13% were on the Tallinn-Stockholm line.

Visits of Tallinn Tourist Information Centres and Tallinn tourism portal increased

Altogether 8,100 visitors (+3%) **visited Tallinn's two tourism information centres**. Tallinn tourism portal received 76,800 visits in March, i.e 15% more than in March 2009.

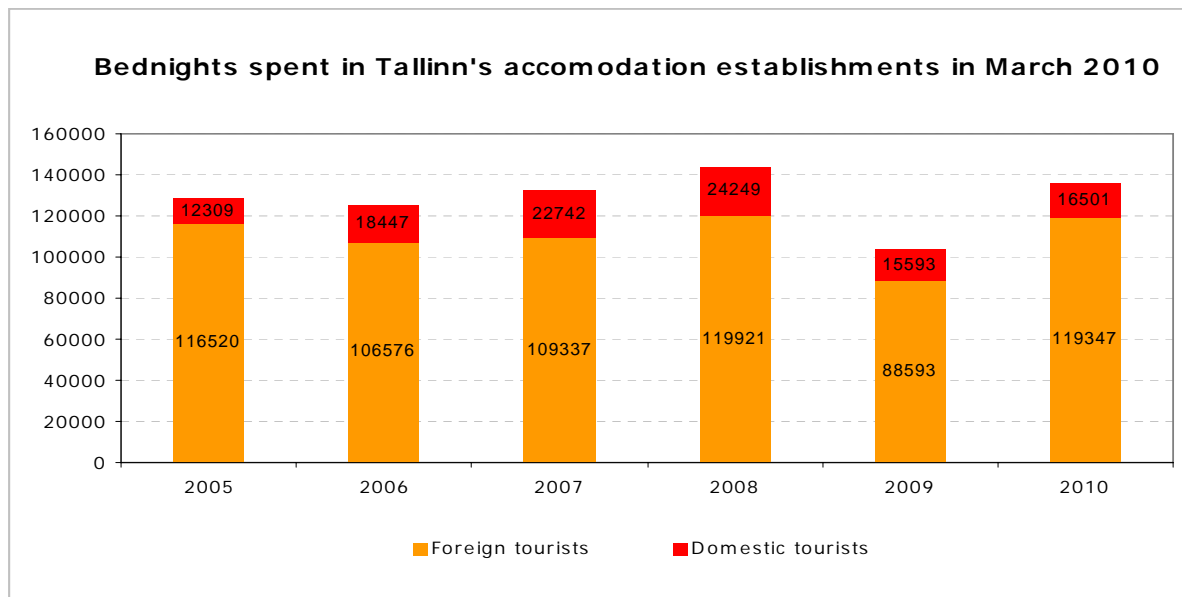
** Average cost of a bednight — the average cost of one guest night in all types of accommodation establishment, includes value-added tax and the cost of breakfast if it is sold with accommodation services.

Tourists staying in Tallinn's accommodation establishments

The strong growth in tourist figures continued in March and possibly because of an improved European economy. Tallinn received almost than one quarter (+24% or 12,700) more foreigner tourists compared to the March 2009. Foreigners accounted for 88% of nights in Tallinn's accommodation establishments. In March last year numbers of tourists and bednights fell sharply compared with the year before (tourists -21% and bednights -28%), and both this year's figures were still lower than in 2008.

A total of 76,100 tourists stayed in Tallinn's accommodation establishments (22% more tourists compared with same month in 2009). Altogether a total of 64,900 foreign tourists used the services of accommodation establishments. The number of domestic tourists also increased, numbers accommodated grew 11%, for a total of 11,200. The number of tourists in January to March was up 16% compared with last year.

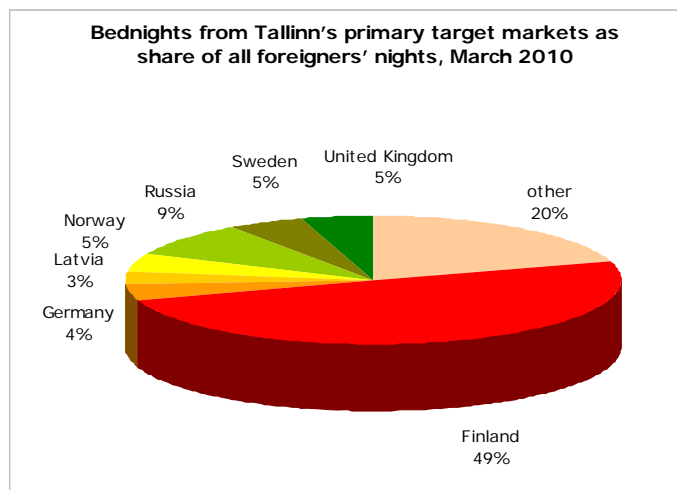
Bednights spent by tourists also rose, with a total of 135,800 bednights (+30%) spent in Tallinn's accommodation establishments. Bednights by foreign tourists rose by 35% (totalling 119 347 bednights) and bednights by Estonian residents were also up by 6% (total 16,500 bednights). The number of nights in January-March was up 23% compared with last year.



Accommodated visitors from Finland and Russia headed this list.

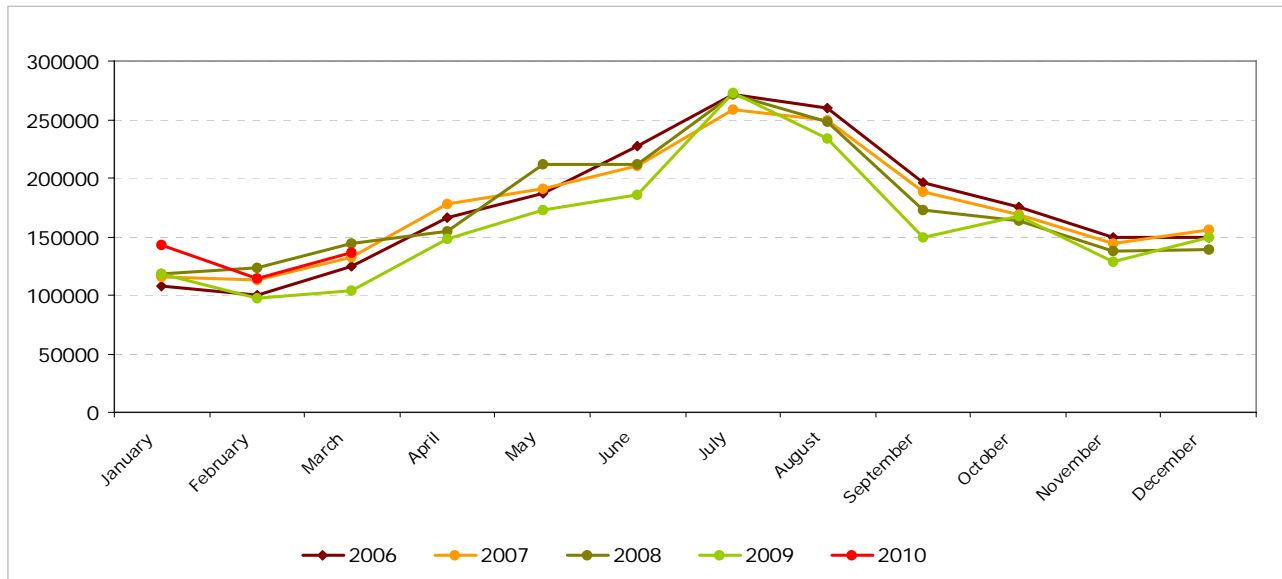
The number of Russian tourist's nights increased by 43% and Finish tourist's nights by 39%.

All other big markets were also up: Germany (+62%), Latvia (+30%), Great Britain (+24%), Sweden (+10%) and Norway (+1%).

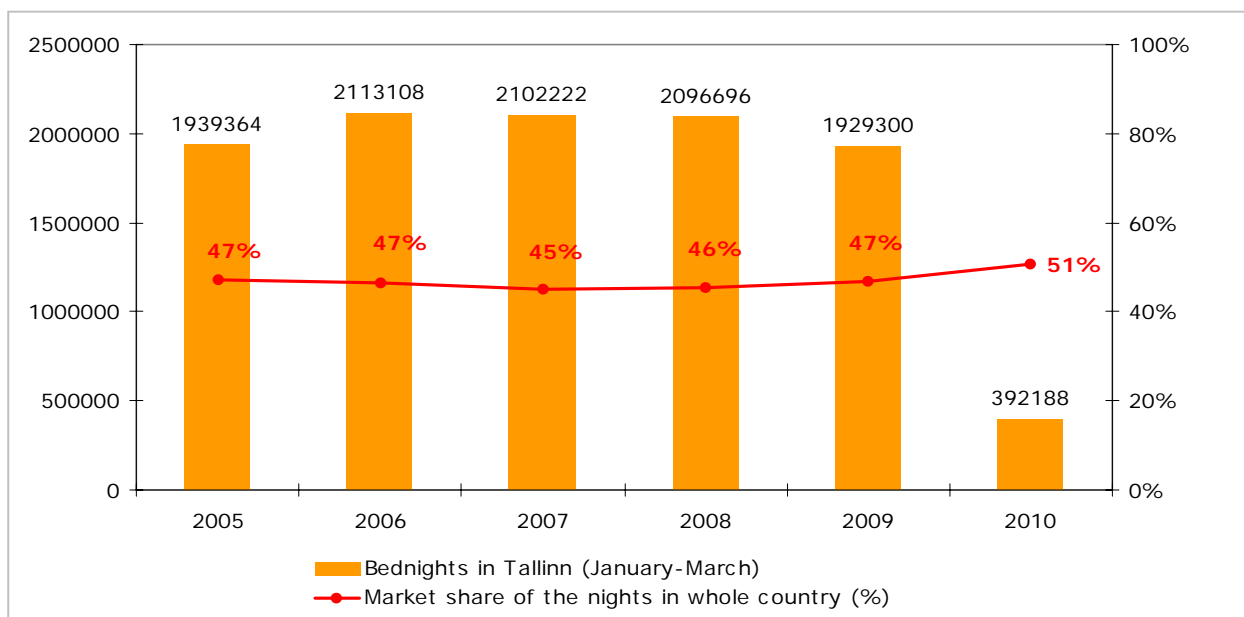


Source: Statistics Estonia

Monthly bednights in Tallinn



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

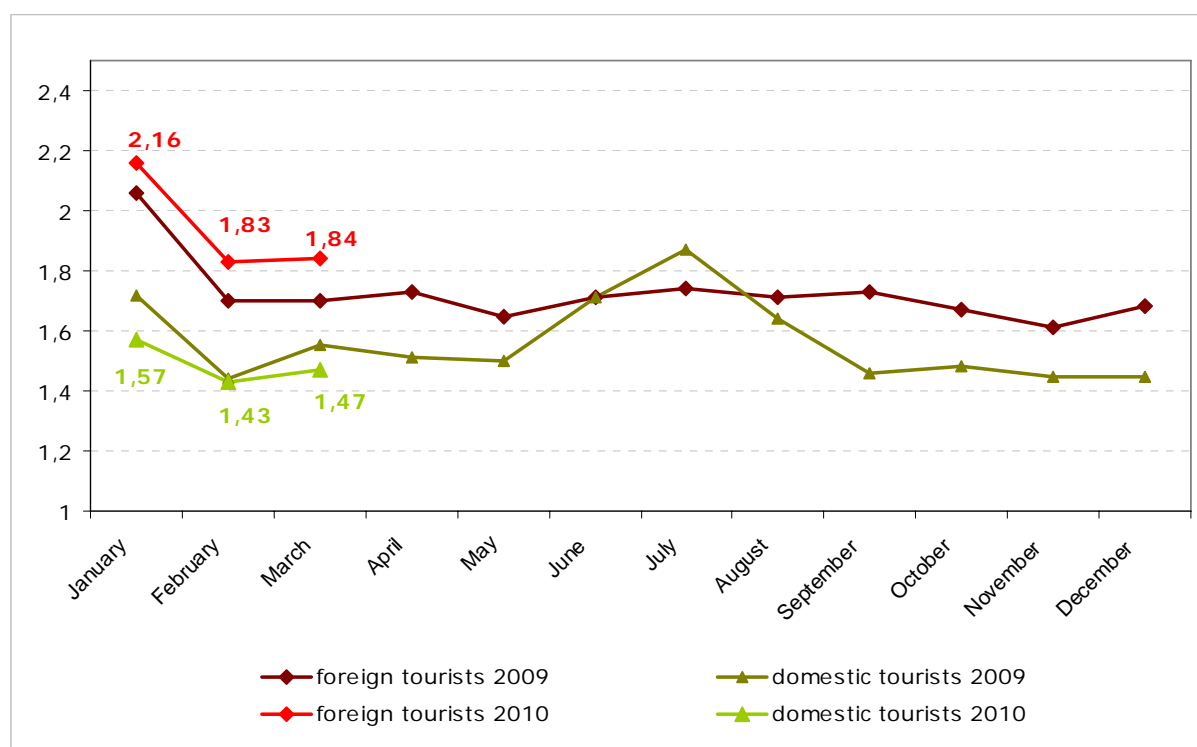


Source: Statistics Estonia

| | 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-March) | 392 188 | 51% | +71 792 | +22% |

Excluding day traveller, visitors spent an average of 1.78 nights in March, which was higher than the year before (1,67 nights). Compared with March 2009 the figure rose among foreigners, but declined for domestic visitors.

The average trip length among foreign tourists rose by 8%, from 1.70 to 1,84 nights. The length of stay for domestic tourists was 1.47 nights (-5%).



Source: Statistics Estonia

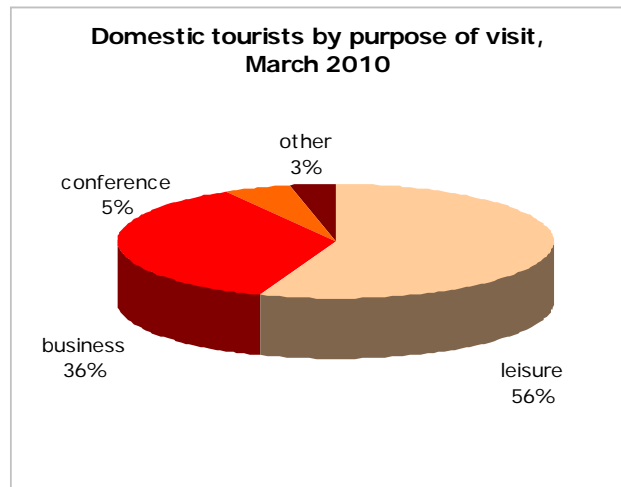
Arrivals, numbers of bednights and length of stay in March 2010

| Country of residence | Arrivals | Change 2009/2010 | | Bednights | Change 2009/2010 | | Length of Stay |
|----------------------|---------------|------------------|-----------|---------------|------------------|-----------|----------------|
| | | Number | % | | Number | % | |
| Albania | 1 | 0 | 0 | 3 | 2 | 200 | 3,00 |
| Austria | 175 | 23 | 15 | 510 | 96 | 23 | 2,91 |
| Belgium | 207 | -67 | -24 | 539 | -114 | -17 | 2,60 |
| Bulgaria | 145 | 109 | 303 | 867 | 777 | 863 | 5,98 |
| Croatia | 54 | -10 | -16 | 123 | -63 | -34 | 2,28 |
| Czech Republic | 144 | 36 | 33 | 438 | 28 | 7 | 3,04 |
| Cyprus | 23 | 9 | 64 | 103 | 80 | 348 | 4,48 |
| Denmark | 535 | -92 | -15 | 1114 | -267 | -19 | 2,08 |
| Finland | 36 694 | 7 234 | 25 | 59 425 | 16 822 | 39 | 1,62 |
| France | 678 | 250 | 58 | 1924 | 804 | 72 | 2,84 |
| Germany | 1 635 | 394 | 32 | 4 606 | 1 765 | 62 | 2,82 |
| Greece | 169 | 116 | 219 | 377 | 234 | 164 | 2,23 |
| Hungary | 90 | 8 | 10 | 496 | 330 | 199 | 5,51 |
| Iceland | 44 | 27 | 159 | 69 | 26 | 60 | 1,57 |
| Ireland | 125 | 12 | 11 | 358 | 110 | 44 | 2,86 |
| Italy | 591 | -9 | -2 | 1504 | 14 | 1 | 2,54 |
| Latvia | 2 685 | 510 | 23 | 3 990 | 929 | 30 | 1,49 |
| Lithuania | 1590 | 273 | 21 | 2743 | 488 | 22 | 1,73 |
| Luxembourg | 61 | 43 | 239 | 74 | 35 | 90 | 1,21 |
| Malta | 15 | 9 | 150 | 27 | 7 | 35 | 1,80 |
| Netherlands | 346 | -68 | -16 | 875 | -6 | -1 | 2,53 |
| Norway | 2249 | -27 | -1 | 5390 | 38 | 1 | 2,40 |
| Poland | 481 | -112 | -19 | 1038 | -232 | -18 | 2,16 |
| Portugal | 78 | 8 | 11 | 270 | 59 | 28 | 3,46 |
| Romania | 43 | -5 | -10 | 153 | 54 | 55 | 3,56 |
| Russia | 5 391 | 1 583 | 42 | 10 241 | 3 057 | 43 | 1,90 |

| Country of residence | Arrivals | Change 2009/2010 | | Bednights | Change 2009/2010 | | Length of Stay |
|-------------------------------------|---------------|------------------|-----------|----------------|------------------|-----------|----------------|
| | | Number | % | | Number | % | |
| Slovakia | 55 | 26 | 90 | 104 | 30 | 41 | 1,89 |
| Slovenia | 45 | 25 | 125 | 94 | -34 | -27 | 2,09 |
| Spain | 740 | 446 | 152 | 1581 | 924 | 141 | 2,14 |
| Sweden | 3 561 | 92 | 3 | 5 874 | 545 | 10 | 1,65 |
| Switzerland | 235 | 55 | 31 | 424 | 103 | 32 | 1,80 |
| Turkey | 102 | -29 | -22 | 255 | 19 | 8 | 2,50 |
| Ukraine | 218 | -10 | -4 | 518 | 51 | 11 | 2,38 |
| United Kingdom | 2 479 | 619 | 33 | 5 712 | 1087 | 24 | 2,30 |
| Other European countries | 809 | 152 | 23 | 2111 | 862 | 69 | 2,61 |
| Total Africa | 35 | 10 | 40 | 67 | 11 | 20 | 1,91 |
| ..South Africa | 5 | 3 | 150 | 7 | 5 | 250 | 1,40 |
| Total Asia | 728 | 153 | 27 | 1387 | 345 | 33 | 1,91 |
| ..China | 188 | 145 | 337 | 302 | 186 | 160 | 1,61 |
| ..Japan | 174 | -50 | -22 | 395 | -32 | -7 | 2,27 |
| ..South-Korea | 65 | 9 | 16 | 81 | -22 | -21 | 1,25 |
| United States | 923 | 450 | 95 | 2167 | 867 | 67 | 2,35 |
| Canada | 95 | 1 | 1 | 229 | -41 | -15 | 2,41 |
| Total Central and South America | 69 | 17 | 33 | 318 | 168 | 112 | 4,61 |
| ..Brasilia | 24 | 0 | 0 | 30 | -36 | -55 | 1,25 |
| Australia, Oceania | 162 | 75 | 86 | 411 | 172 | 72 | 2,54 |
| ..Australia | 141 | 80 | 131 | 380 | 221 | 139 | 2,70 |
| Other countries | 430 | 337 | 362 | 838 | 572 | 215 | 1,95 |
| Total foreign tourists | 64 935 | 12 673 | 24 | 119 347 | 30 754 | 35 | 1,84 |
| Domestic tourists | 11 239 | 1 133 | 11 | 16 501 | 908 | 6 | 1,47 |
| Countries of residence total | 76 174 | 13 806 | 22 | 135 848 | 31 662 | 30 | 1,78 |

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-March) | 150 500 | 72 | 48 100 | 23 | 5 700 | 3 | 4 600 | 2 |

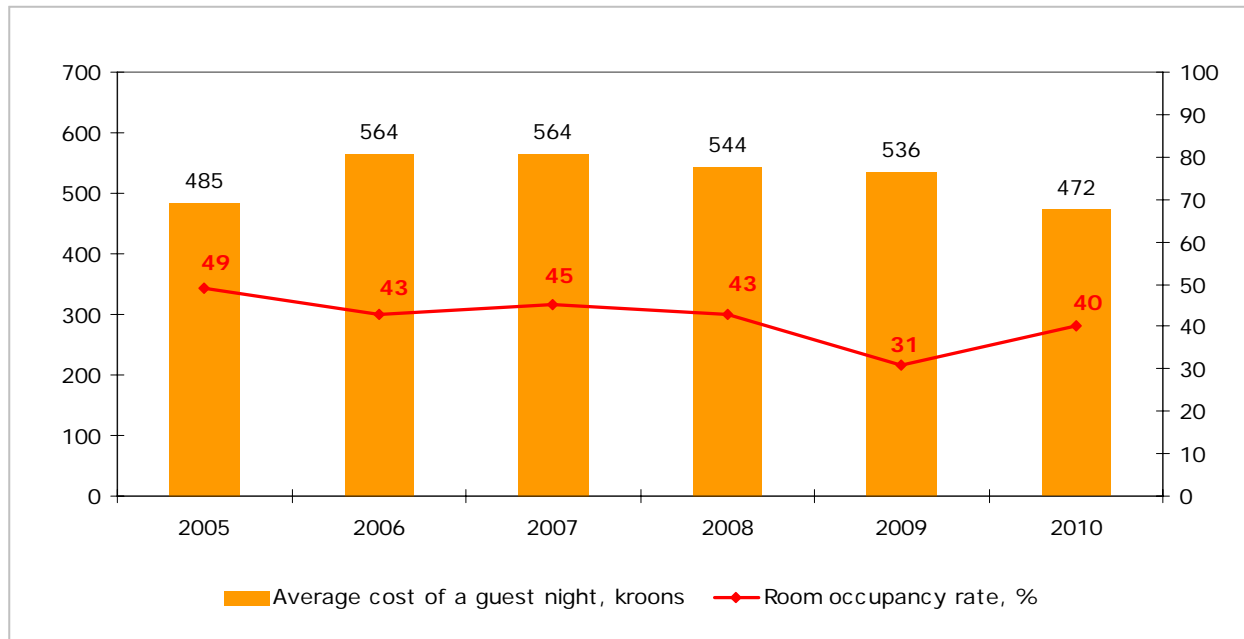
Source: Statistics Estonia

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 (March) | 57 | 354 | 6 495 | 7 553 | 12 699 | 15 295 |

Source: Tallinn City Tourist Office & Convention Bureau

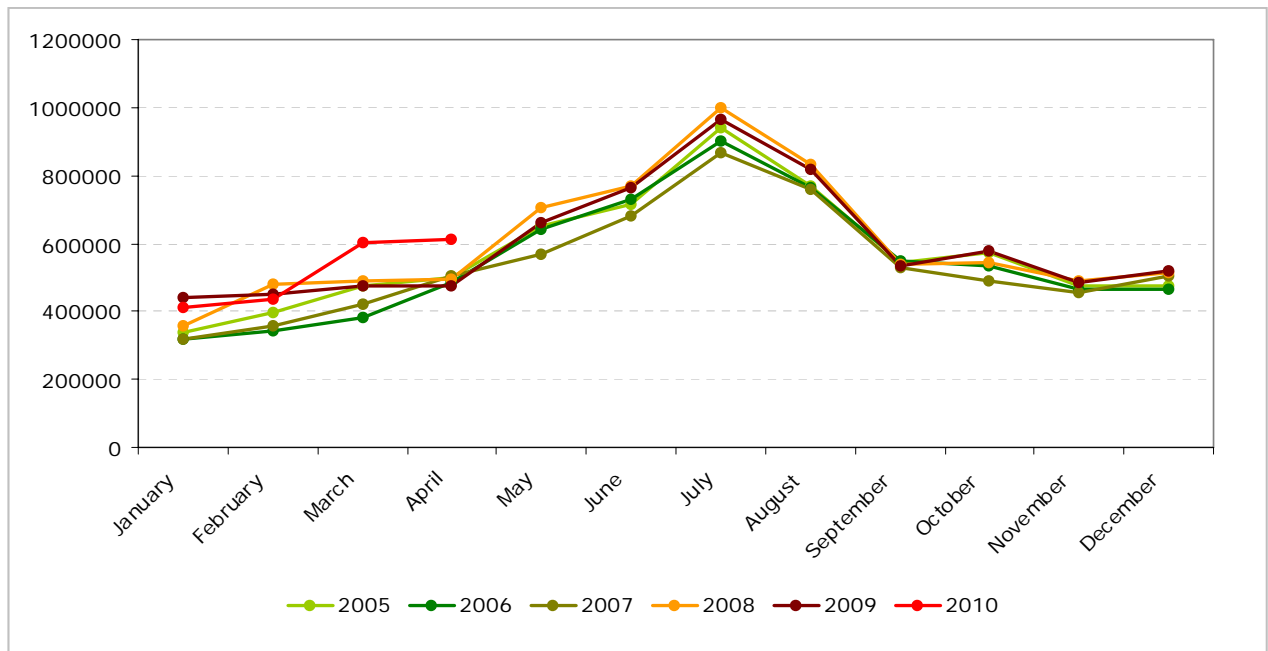
The average price of accommodation and room occupancy rate in Tallinn (in March 2005-2010)



| | Room occupancy rate, % | Average cost of a guest night, kroons |
|----------------------|------------------------|---------------------------------------|
| 2005 | 60 | 582 |
| 2006 | 58 | 598 |
| 2007 | 55 | 604 |
| 2008 | 50 | 601 |
| 2009 | 44 | 533 |
| 2010 (January-March) | 37 | 469 |

Source: Statistics Estonia

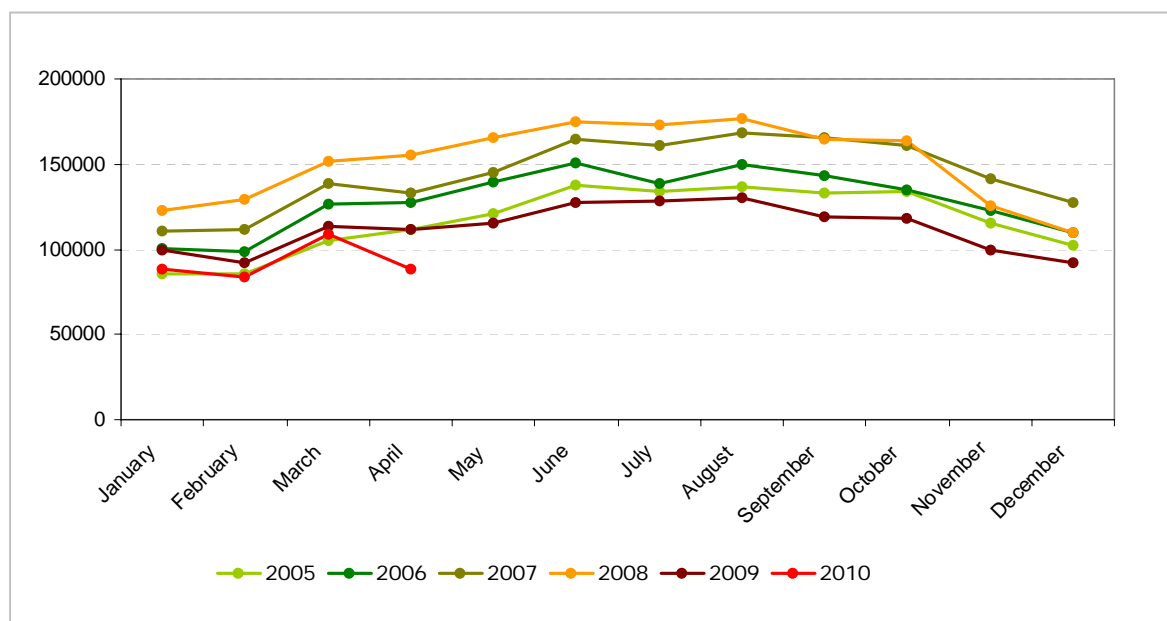
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2010)



| | 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 | | |
| June | 713 230 | 728 524 | 682 167 | 770 423 | 764 941 | | |
| July | 940 806 | 902 446 | 867 053 | 1 000 901 | 963 521 | | |
| August | 769 703 | 765 062 | 758 731 | 832 229 | 816 245 | | |
| September | 544 459 | 550 915 | 531 333 | 537 336 | 532 226 | | |
| October | 574 767 | 534 187 | 490 097 | 542 484 | 577 465 | | |
| 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 | 2 057 832 | |

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 | 88 530 | -11 |
| February | 90 295 | 82 599 | -8 | 1 415 | 1 340 | -5 | 91 710 | 83 945 | -9 |
| March | 111 982 | 107 689 | -4 | 1 645 | 1 591 | -3 | 113 629 | 109 208 | -4 |
| April | 109 859 | 87 422 | -21 | 1 525 | 1 157 | -24 | 113 627 | 88 579 | -21 |
| May | 113 410 | | | 1 866 | | | 115 276 | | |
| June | 124 801 | | | 2 257 | | | 127 058 | | |
| July | 125 580 | | | 2 754 | | | 128 334 | | |
| August | 128 283 | | | 2 367 | | | 130 650 | | |
| September | 116 964 | | | 1 723 | | | 118 687 | | |
| October | 116 175 | | | 1 733 | | | 117 908 | | |
| November | 98 001 | | | 1 754 | | | 99 755 | | |
| December | 90 882 | | | 1 624 | | | 92 506 | | |
| TOTAL | 1 323 907 | 364 403 | | 22 329 | 5 923 | | 1 346 236 | 370 326 | |

Source: Tallinn Airport

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