

TOURISM IN TALLINN October 2009

In October 2009, 174,100 tourists stayed in Estonian accommodation establishments, 58% of whom stayed in Tallinn.

Arrivals in Tallinn: 101,000 (+5%)*
Bednights in Tallinn: 166,600 (+2%)

- **Foreign tourists: 88,500 (+8%)**
Bednights of foreign tourists: 148,000 (+5%)
- **Domestic tourists: 12,500 (-10%)**
Bednights of domestic tourists: 18,600 (-20%)

Bednights of Russian and Finnish markets increased

Primary markets:

Finland: 76,700 nights (+22%)
Russia: 8,800 nights (+13%)
Sweden: 8,600 nights (-12%)
Norway: 8,200 nights (-8%)
Germany: 5,200 nights (-30%)
Great Britain: 5,200 nights (-30%)
Latvia: 4,300 nights (-18%)

Secondary markets:

Italy: 2,100 nights (-5%)
USA: 2,300 nights (+6%)
Spain: 1,100 nights (-41%)
France: 2,200 nights (+21%)
Japan: 1,600 nights (+61%)
Belgium: 1,000 nights (-13%)
China: 400 nights (-5%)

Shorter length of stay among tourists in Tallinn

The average length of stay for tourists was 1.65 nights (-3%).

Stays by foreign tourists: 1.67 nights (-2%)
Domestic tourists: 1.48 nights (-12%)

* comparison October 2008, %

Among primary markets, Norwegian tourists stay the longest (2.54 nights), and Finnish tourists spent the shortest time (1.44 nights).

70% of accommodated tourists arrived for holidays

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

53% of domestic tourists visit for leisure purposes, 35% for business, 10% for attending conferences and 2% for other purposes.

Room occupancy rates and average price of bednights** decreased

In October 418 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 45%, 3 percentage points lower than in October of the previous year.

The average cost of a bednight in an accommodation establishment was 510 kroons, which is 17% (105 kroons) less expensive compared to October 2008.

Travellers by air decrease, but by sea increased

The number of passengers at **Tallinn Airport** was 117,900, down 28% compared with October the year before.

The number of passengers passing through the **Tallinn Old Harbour** totaled 577,500, up by 6% compared with October last year.

Passengers:

Finnish traffic: 520 000

Swedish traffic: 57 400

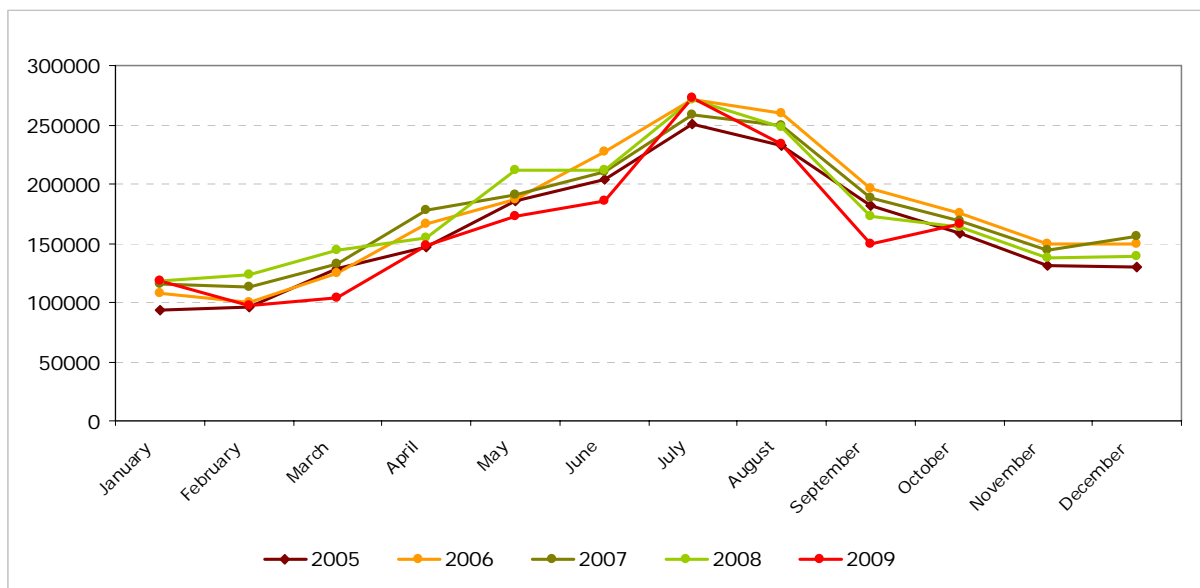
Other passengers: 100

** 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.

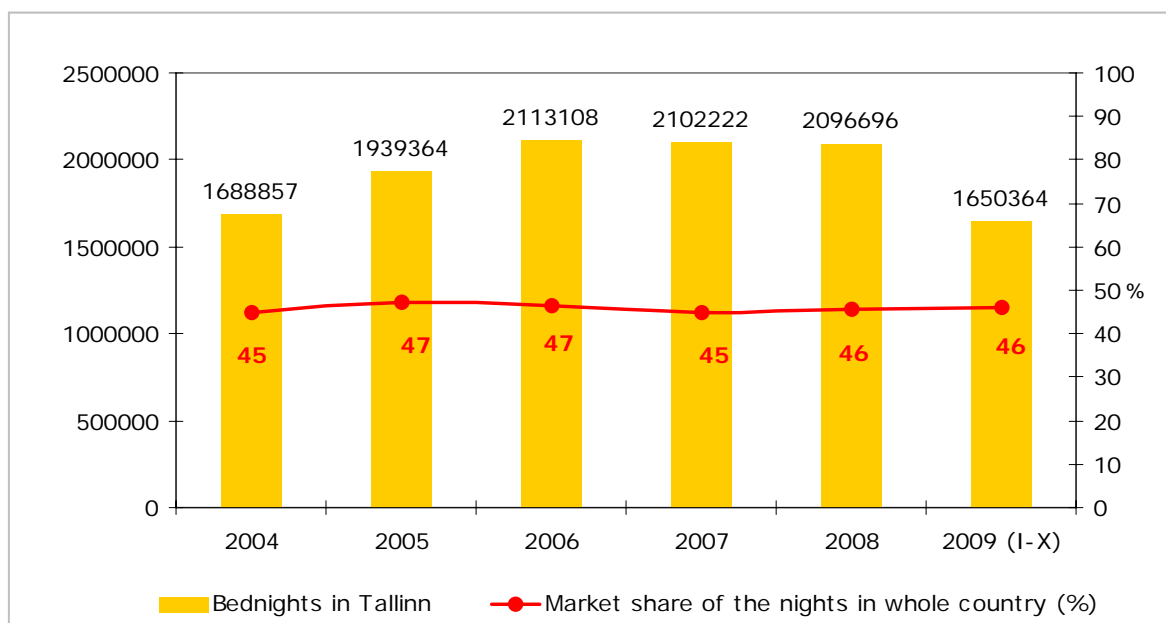
Tourists staying in Tallinn's accommodation establishments

During the period from January to October 2009, a total of **963,400** tourists stayed in Tallinn's accommodation establishments (6% less tourists compared with same period in 2008). Altogether a total of **852,000 foreign tourists** used the services of accommodation establishments (-3% or 30,500 tourists). The number of **domestic tourists** decreased somewhat, numbers accommodated fell 20%, by 28,200 tourists, for a total of **111,400**. Bednights spent by tourists also shrank during the first ten months, with a total of **1,650,400 bednights (-9%)** spent in Tallinn's accommodation establishments. While **bednights by foreign tourists shrank by 7%** (totalling 1,472,600 bednights), **bednights by Estonian residents were down by 27%** (total 177,800 bednights).

Monthly bednights in Tallinn



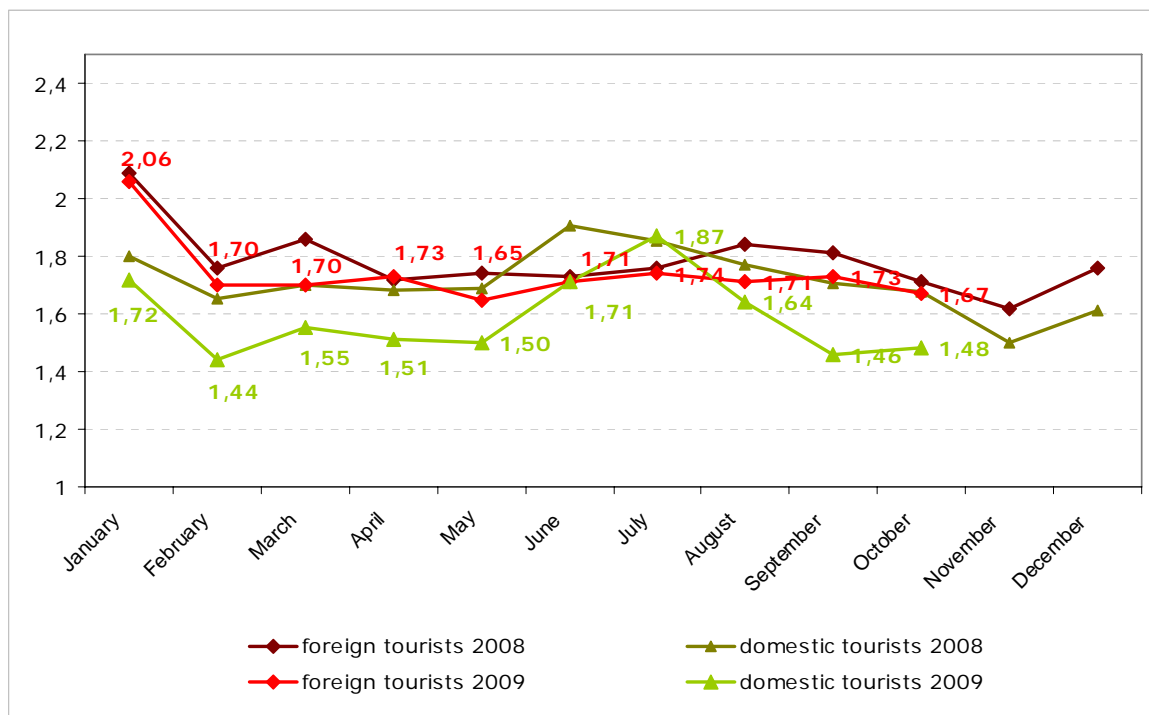
Total bed-nights in Tallinn and market share of the bed-nights in Estonia



	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-October)	1 650 364	46 %	-169 400	-9%

In the in the first ten months of 2009 **the average length of stay** continued to decline and it was **1.71 nights (-4%)**. The longest stays in Tallinn were in January and July, and the shortest were in February and October. Compared to the previous year, the average length of stay decreased the most in October.

During the first ten months the average trip length among **foreign tourists** shortened by 3%, from 1.79 to 1.73 nights. The length of stay for **domestic tourists** decreased even more, from 1.74 to 1.60 nights, or 9 percentages points.



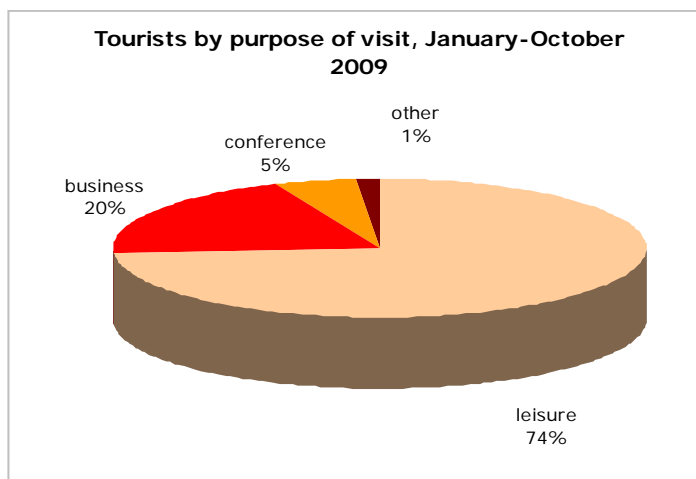
Arrivals, numbers of bed-nights and length of stay in October 2009

Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Albania	2	-6	-75	7	-36	-84	3,50
Austria	393	161	69	1 090	478	78	2,77
Belgium	455	-30	-6	1 008	-147	-13	2,22
Bulgaria	70	6	9	549	411	298	7,84
Croatia	29	-58	-67	64	-64	-50	2,21
Czech Republic	206	51	33	480	77	19	2,33
Cyprus	14	1	8	61	-11	-15	4,36
Denmark	921	195	27	2 105	475	29	2,29
Finland	53 416	8 799	20	76 738	13 598	22	1,44
France	776	-29	-4	2 159	375	21	2,78
Germany	2 497	-655	-21	5 184	-2 221	-30	2,08
Greece	209	140	203	423	269	175	2,02
Hungary	100	-48	-32	195	-207	-51	1,95
Iceland	45	3	7	103	12	13	2,29
Ireland	131	-37	-22	349	-145	-29	2,66
Italy	823	-134	-14	2 148	-116	-5	2,61
Latvia	2 782	-722	-21	4 295	-642	-13	1,54
Lithuania	1 619	-1 040	-39	2 713	-1 786	-40	1,68
Luxembourg	48	-1	-2	103	2	2	2,15
Malta	8	-16	-67	21	-58	-73	2,63
Netherlands	516	-12	-2	1 142	-173	-13	2,21
Norway	3 219	-398	-11	8 174	-720	-8	2,54
Poland	621	-60	-9	1 235	81	7	1,99
Portugal	144	92	177	347	44	15	2,41
Romania	65	-22	-25	175	-153	-47	2,69
Russia	4 921	895	22	8 770	978	13	1,78

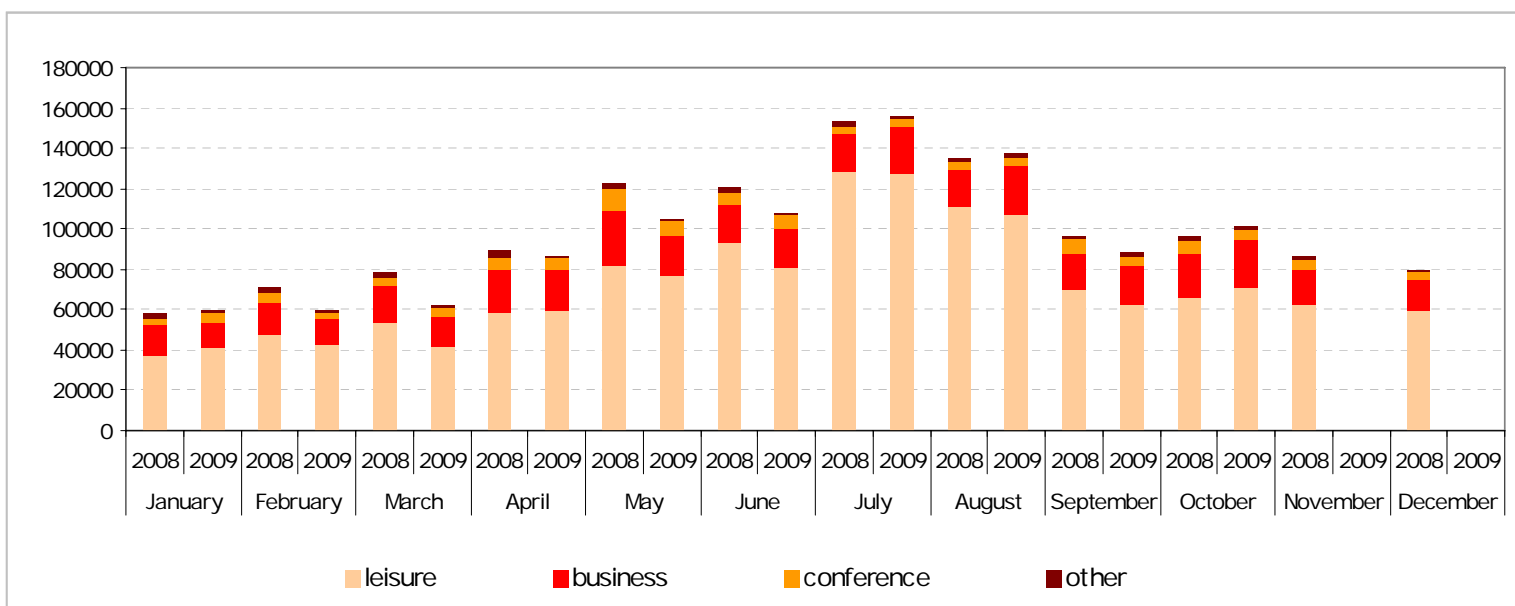
Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Slovakia	36	-42	-54	129	-99	-43	3,58
Slovenia	39	-25	-39	111	12	12	2,85
Spain	516	-235	-31	1111	-760	-41	2,15
Sweden	5 529	-8	0	8 595	-1 203	-12	1,55
Switzerland	229	-3	-1	550	94	21	2,40
Turkey	85	-849	-91	303	-1 278	-81	3,56
Ukraine	292	-45	-13	804	129	19	2,75
United Kingdom	2 525	-599	-19	5 796	-1 866	-24	2,30
Other European countries	1 514	138	10	3 027	271	10	2,00
Total Africa	104	29	39	429	313	270	4,13
..South Africa	27	1	4	48	11	30	1,78
Total Asia	1 682	619	58	3 205	1 069	50	1,91
..China	257	98	62	439	-23	-5	1,71
..Japan	848	294	53	1 636	620	61	1,93
..South-Korea	43	8	23	67	12	22	1,56
United States	1 019	45	5	2 341	123	6	2,30
Canada	153	-45	-23	397	-86	-18	2,59
Total Central and South America	199	35	21	428	-126	-23	2,15
..Brasilia	147	66	81	305	-31	-9	2,07
Australia, Oceania	265	17	7	728	124	21	2,75
..Australia	220	21	11	584	68	13	2,65
Other countries	254	243	2209	460	442	2 456	1,81
Domestic tourists	12 520	-1 314	-9	18 558	-4 654	-20	1,48
Total foreign tourists	88 471	6 350	8	148 052	7 480	5	1,67
Countries of residence total	100 991	5 036	5	166 610	2 826	2	1,65

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-October)	710 894	74	189 725	20	48 783	5	14 024	1



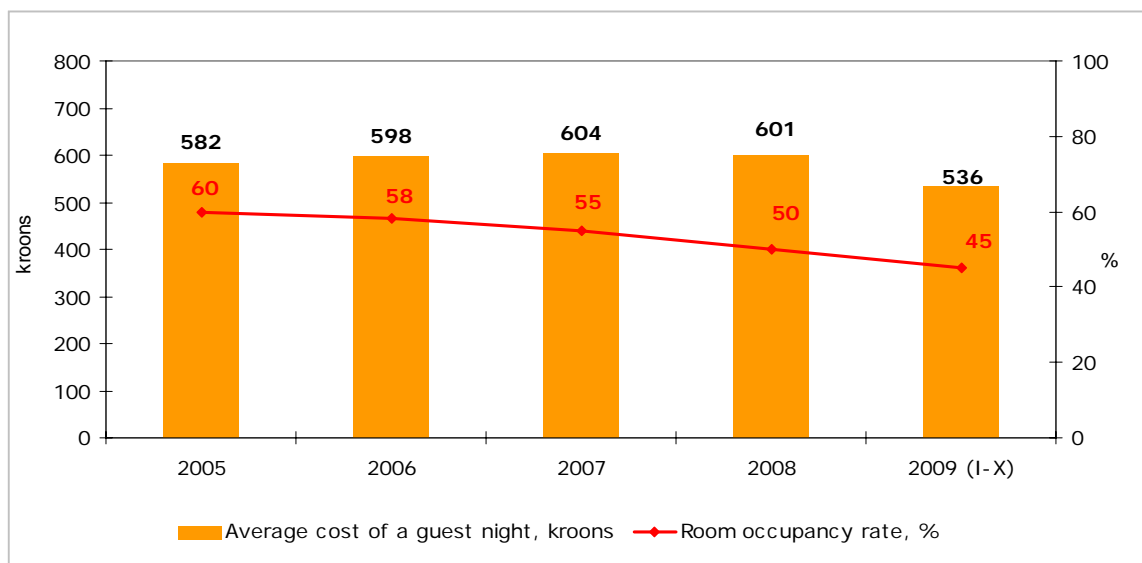
Source: Statistics Estonia

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

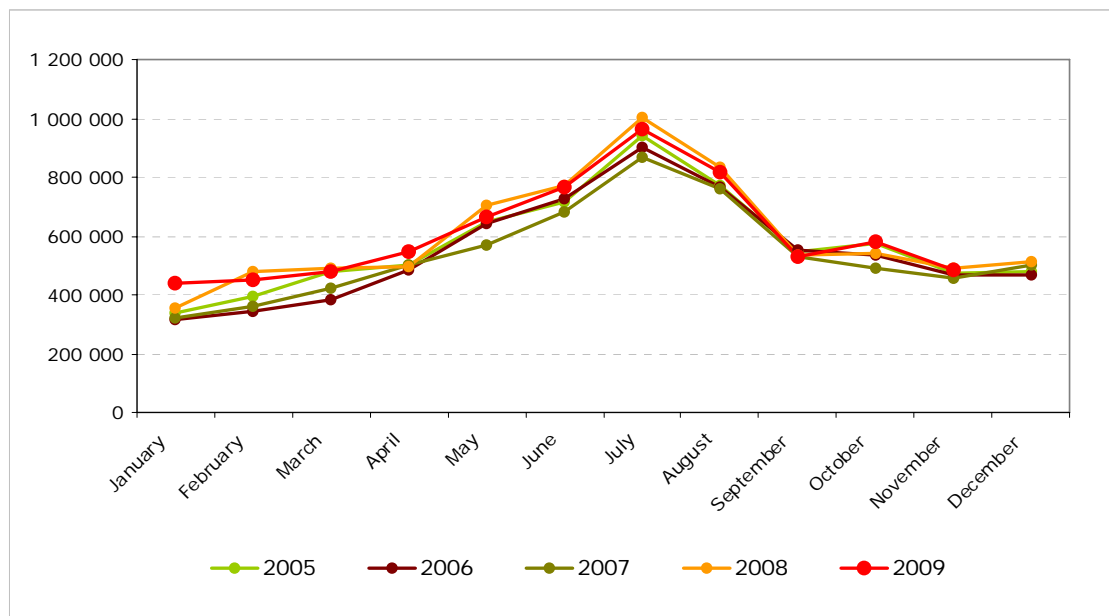
The average price of accommodation and room occupancy rate in Tallinn



	Room occupancy rate, %	Average cost of a guest night, kroons
2005	60	582
2006	58	598
2007	55	604
2008	50	601
2009 (January-October)	45	536

Source: Statistics Estonia

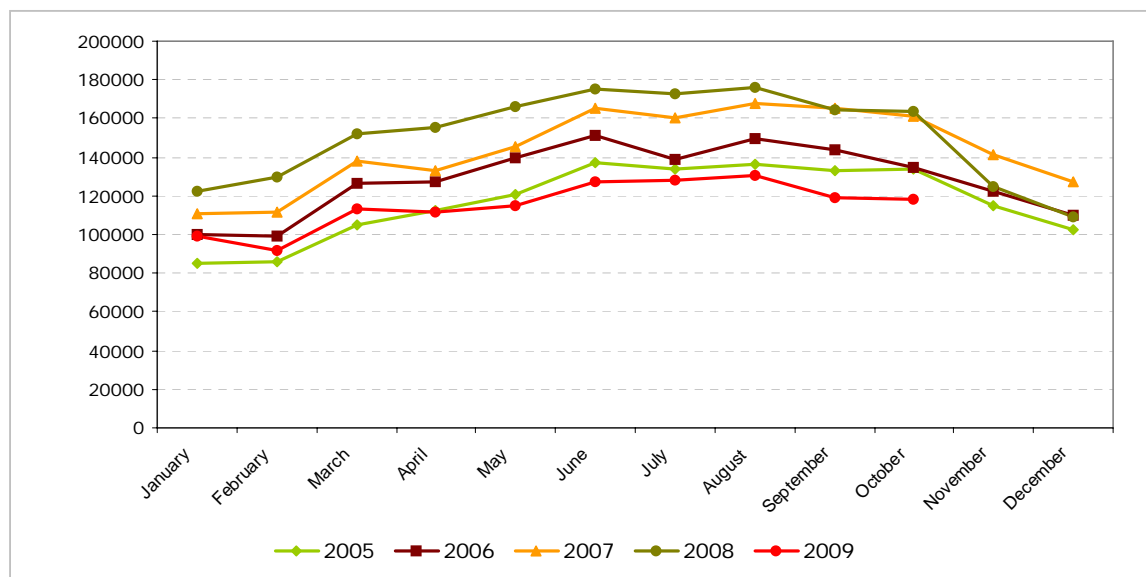
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2009)



	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		
TOTAL	6 854 949	6 587 568	6 458 244	7 214 342	6 716 510	

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	97 994	-21	1 205	1 754	46	125 124	99 748	-20
December	107 799			1 535			109 334		
TOTAL	1 790 063	1 233 018		21 473	20 705		1 811 536	1 253 723	

Source: Tallinn Airport

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