

TOURISM IN TALLINN January 2010

In January 2010, 122,800 tourists stayed in Estonian accommodation establishments, 55% of whom stayed in Tallinn.

Arrivals in Tallinn: 68,000 (+14%)*
Bednights in Tallinn: 141,700 (+20%)

- Foreign tourists: 59,300 (+20%)
Bednights of foreign tourists: 128,000 (+25%)
- Domestic tourists: 8,700 (-12%)
Bednights of domestic tourists: 13,700 (-16%)

Bednights increased due to European Figure Skating Championships and the Orthodox Christmas season

Russia: 45,100 nights (+40%)
Finland: 43,100 nights (+24%)
Sweden: 4,400 nights (-9%)
Great Britain: 4,200 nights (+10%)
Latvia: 3,400 nights (-3%)
Norway: 3,400 nights (+8%)
Germany: 3,100 nights (+18%)

Italy: 2,400 nights (+27%)
France: 2,000 nights (+81%)
USA: 1,100 nights (-24%)
Belgium: 600 nights (+47%)
Spain: 500 nights (+12%)
Japan: 500 nights (+194%)
China: 300 nights (-7%)

Rise in length of stay

The average length of stay for tourists was **2.08 nights (+5%)**.

Stays by domestic tourists: 1.57 nights (-5%)

Foreign tourists: 2.16 nights (+5%).
Among primary markets, Russians tourists

stay the longest (2.89 nights) and Latvian tourists spent the shortest time (1.56 nights).

Largest increase in leisure travel

78% of foreign tourists stay in Tallinn for leisure purposes, 19% for business, 1% for attending a conference and 2% for other purposes.

53% of domestic tourists visit for leisure purposes, 42% for business, 2% for attending conferences and 3% for other purposes.

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

353 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 37%, 4 percentage points higher than in January of the previous year.

The average cost of a bednight in an accommodation establishment was 468 kroons, which is 12% (66 kroons) less expensive compared to January 2009.

Decline in passengers in air and sea travel

88,500 passengers passed through **Tallinn Airport** in January 2010 (-11%).

Passengers in **Tallinn Old Harbour** totalled **412,700 (-6%)**, of whom 88% were on the Tallinn-Helsinki line.

Visits of Tallinn tourism portal increased

Tallinn tourism portal received 66 600 visits in January, i.e 12% more than in January 2009 (59 500).

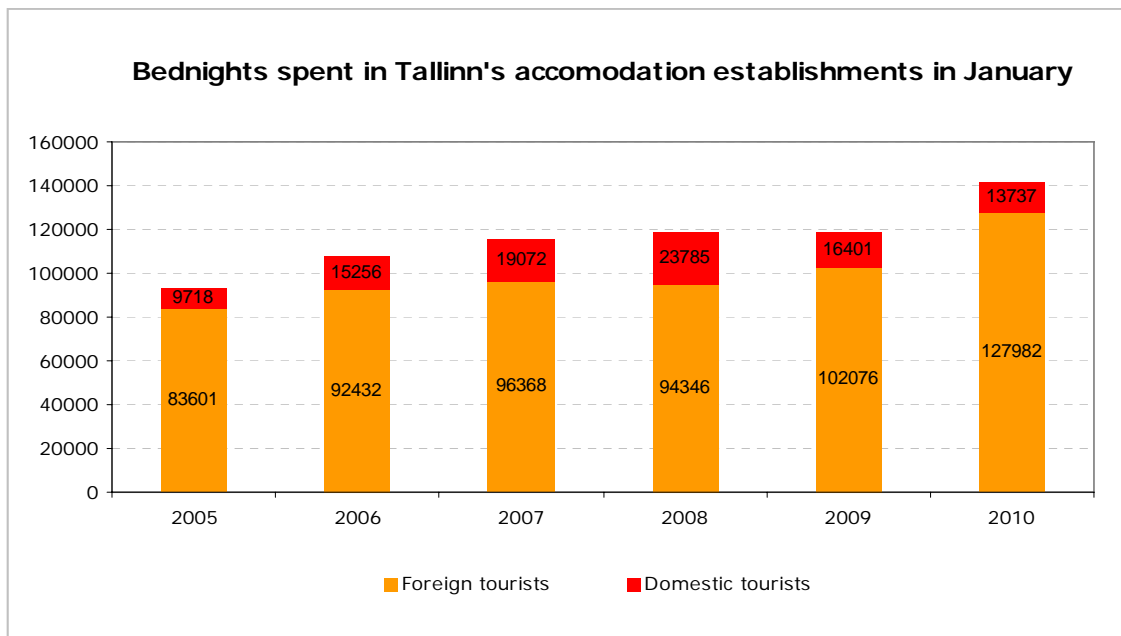
* comparison January 2009, %

** 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 Orthodox Christmas season and European Figure Skating Championship rose tourism numbers to a record level of January. A total of 68,000 tourists stayed in Tallinn's accommodation establishments (14% more tourists compared with same month in 2009). Altogether a total of 59,300 foreign tourists used the services of accommodation establishments (+20% or 9,700 tourists). The number of domestic tourists decreased, numbers accommodated fell 12%, by 1,200 tourists, for a total of 8,700.

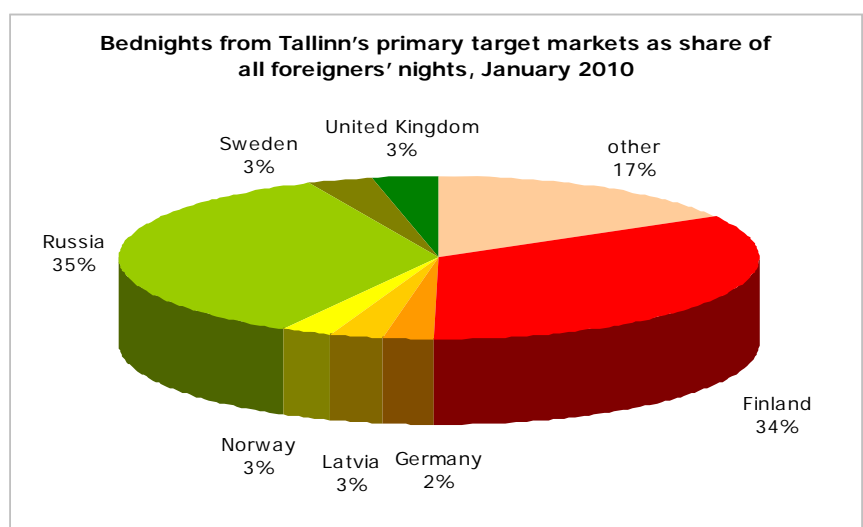
Tallinn's share of nights in Estonia was 55% or 3 percentage points higher than the year before in January. Bednights spent by tourists also rose, with a total of 141,800 bednights (+20%) spent in Tallinn's accommodation establishments. While bednights by foreign tourists rose by 25% (totalling 128,000 bednights), but bednights by Estonian residents were down by 16% (total 13,700 bednights). Foreigners accounted for 90% of nights in Tallinn.



Accommodated visitors from Russia and Finland headed this list.

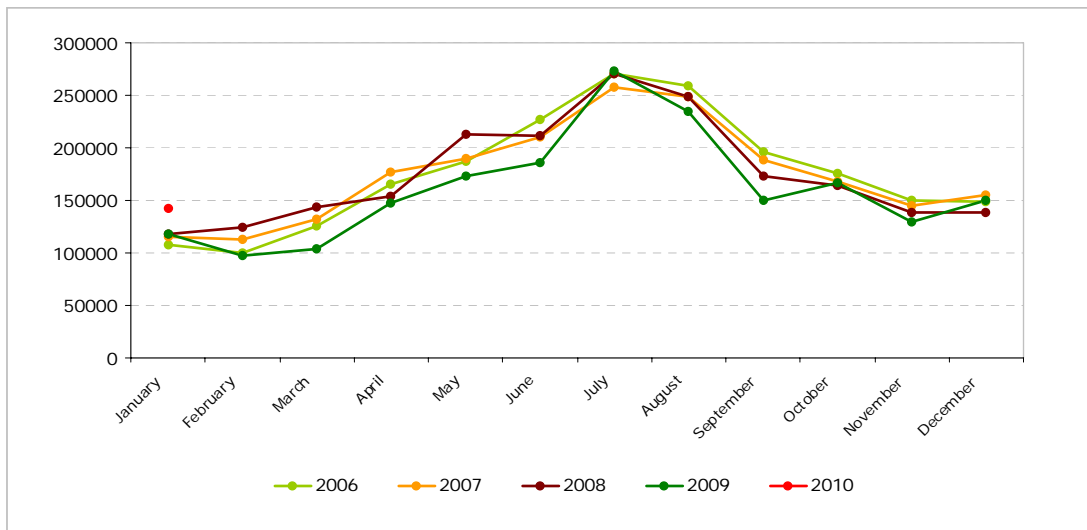
The number of Russian tourist's nights increased by 40% and Finish tourist's nights by 24%.

Other big markets were Sweden (-9%), Great Britain (+10%), Latvia (-3%), Norway (+8%) and Germany (+18%).

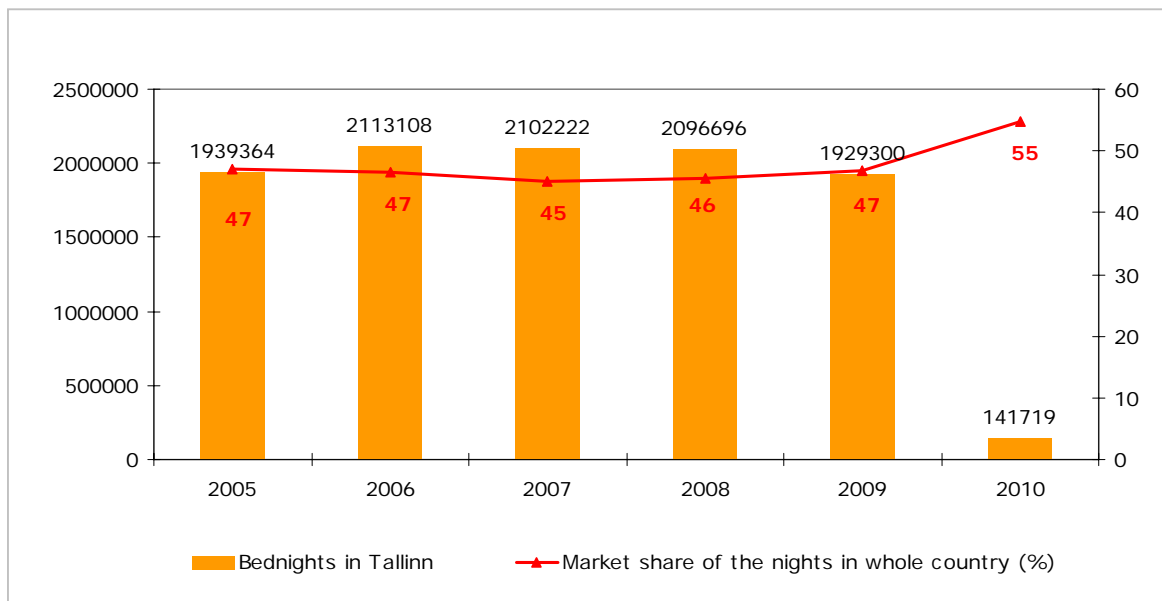


Source: Statistics Estonia

Monthly bednights in Tallinn



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

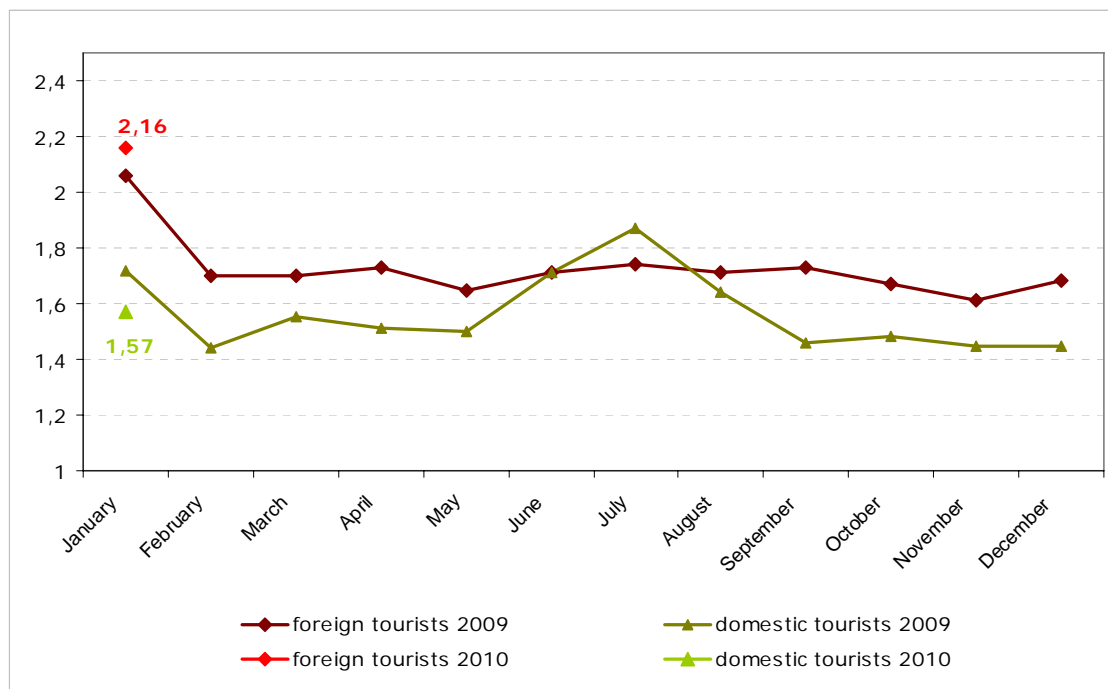


Source: Statistics Estonia

	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)	141 719	55%	2 324	20%

Excluding day traveller, visitors spent an average of 2.06 nights in January, which was higher than the year before (1,99 nights). Compared with January 2009 the figure rose among foreigners, but declined domestic visitors.

The average trip length among foreign tourists rose by 5%, from 2.06 to 2.16 nights. The length of stay for domestic tourists decreased, from 1.66 to 1.57 nights, or 5 percentage points.



Source: Statistics Estonia

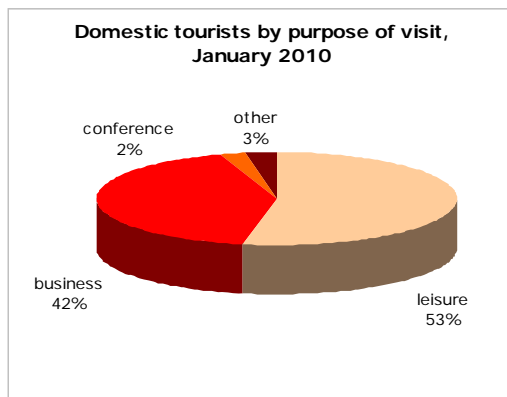
Arrivals, numbers of bed-nights and length of stay in January 2010

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of Stay
		Number	%		Number	%	
Albania	0	-7	-100	0	-21	-100	
Austria	111	-22	-17	375	24	7	3,38
Belgium	145	-59	-29	622	199	47	4,29
Bulgaria	132	80	154	441	344	355	3,34
Croatia	23	-3	-12	45	-50	-53	1,96
Czech Republic	105	-11	-9	296	-136	-31	2,82
Cyprus	41	35	583	130	107	465	3,17
Denmark	377	-133	-26	768	-312	-29	2,04
Finland	26 593	3 212	14	43 110	8 388	24	1,62
France	670	219	49	2 027	905	81	3,03
Germany	1 133	131	13	3 114	469	18	2,75
Greece	240	175	269	462	241	109	1,93
Hungary	80	-17	-18	394	199	102	4,93
Iceland	14	-18	-56	37	-23	-38	2,64
Ireland	90	-10	-10	213	-45	-17	2,37
Italy	746	114	18	2 448	517	27	3,28
Latvia	2 189	91	4	3 412	-103	-3	1,56
Lithuania	1 106	-134	-11	1 904	-356	-16	1,72
Luxembourg	36	5	16	59	18	44	1,64
Malta	11	-8	-42	18	-27	-60	1,64
Netherlands	254	-111	-30	604	-281	-32	2,38
Norway	1 450	125	9	3 434	245	8	2,37
Poland	325	-62	-16	758	-256	-25	2,33
Portugal	57	8	16	277	22	9	4,86
Romania	48	3	7	152	38	33	3,17
Russia	15 625	4 926	46	45 098	12 964	40	2,89

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of Stay
		Number	%		Number	%	
Slovakia	38	2	6	114	14	14	3,00
Slovenia	27	12	80	58	-23	-28	2,15
Spain	210	28	15	531	56	12	2,53
Sweden	2 273	-384	-14	4 359	-436	-9	1,92
Switzerland	303	168	124	711	471	196	2,35
Turkey	136	66	94	353	147	71	2,60
Ukraine	457	244	115	1 506	977	185	3,30
United Kingdom	1 596	189	13	4 167	386	10	2,61
Other European countries	846	159	23	1 667	85	5	1,97
Total Africa	60	26	76	159	81	104	2,65
..South Africa	3	-13	-81	5	-14	-74	1,67
Total Asia	727	383	111	1 474	591	67	2,03
..China	162	72	80	323	-25	-7	1,99
..Japan	229	140	157	499	329	194	2,18
..South-Korea	108	84	350	155	129	496	1,44
United States	424	-40	-9	1 079	-344	-24	2,54
Canada	88	14	19	248	18	8	2,82
Total Central and South America	53	9	20	107	5	5	2,02
..Brasilia	22	7	47	58	29	100	2,64
Australia, Oceania	102	-19	-16	247	-118	-32	2,42
..Australia	58	-47	-45	164	-165	-50	2,83
Other countries	351	308	716	1 004	926	1187	2,86
Domestic tourists	8 746	-1 150	-12	13 737	-2 664	-16	1,57
Total foreign tourists	59 292	9 694	20	127 982	25 906	25	2,16
Countries of residence total	68 038	8 544	14	141 719	23 242	20	2,08

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)	50 826	75	14 805	22	1 003	1	1 404	2

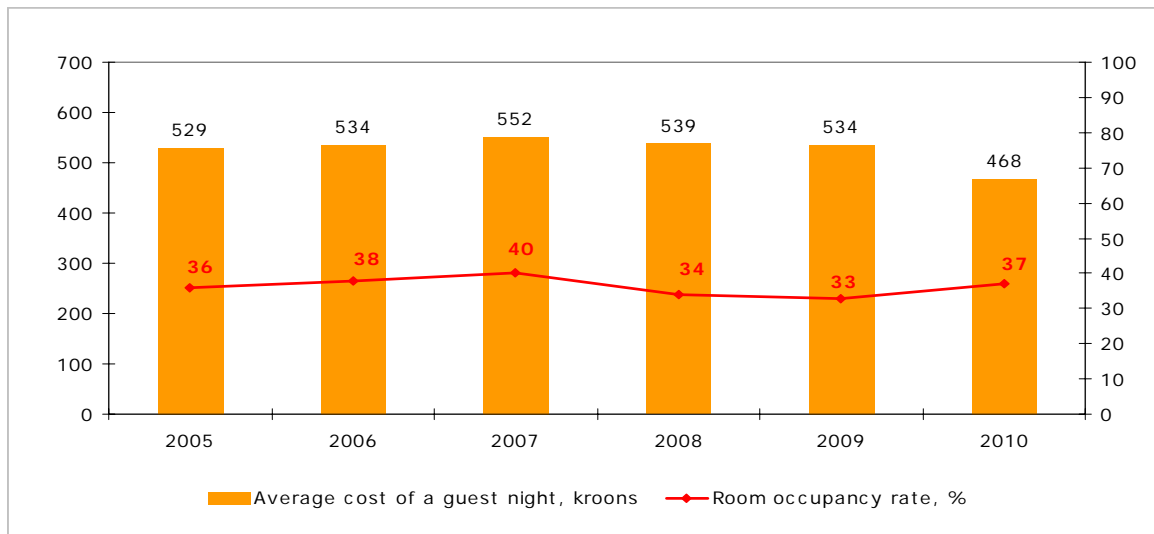
Source: Statistics Estonia

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 (January)	57	353	6 495	7 551	12 699	15 291

Source: Tallinn City Tourist Office & Convention Bureau

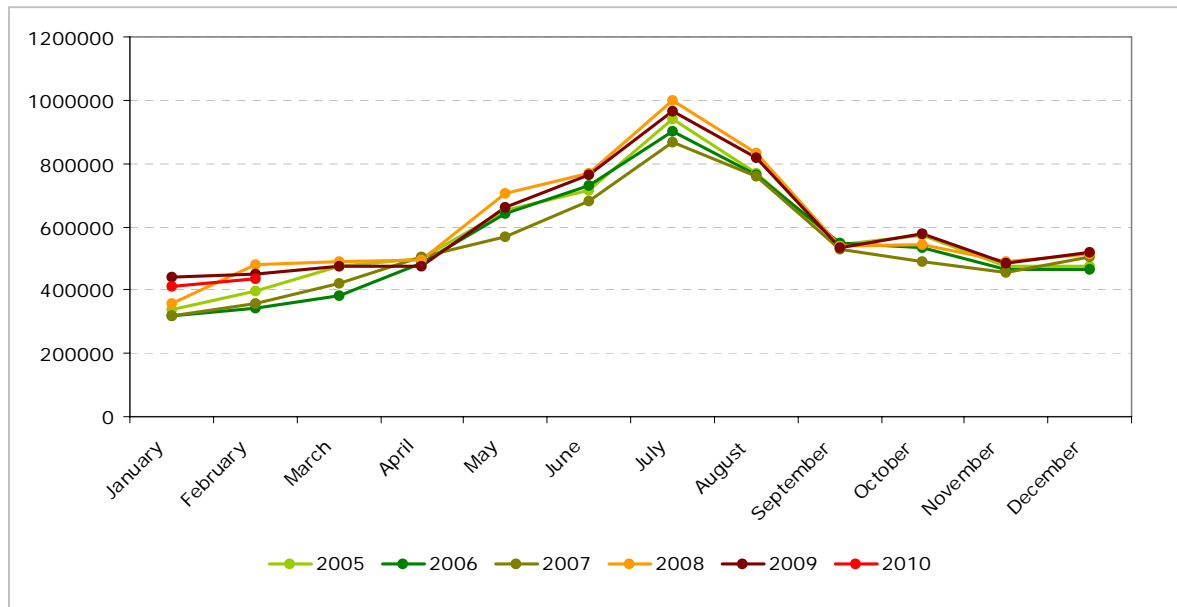
The average price of accommodation and room occupancy rate in Tallinn (in January 2005-2010)



	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)	37	468

Source: Statistics Estonia

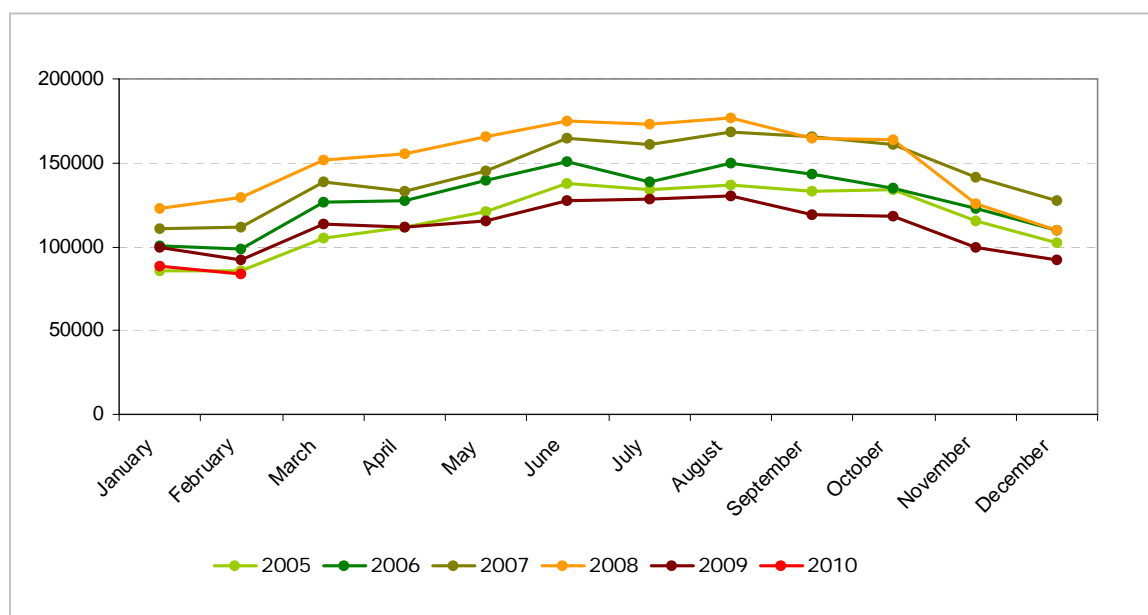
Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2010)



	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		
April	499 676	484 488	502 471	495 746	547 671		
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	846 743	

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	86 695	-11	1 666	1 835	+10	99 341	88 530	-11
February	90 295	82 605	-8	1 415	1 340	-5	91 710	83 945	-9
March	111 982			1 645			113 629		
April	109 859			1 525			113 627		
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	169 300		22 329	3 175		1 346 236	172 475	

Source: Tallinn Airport

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