

## TOURISM IN TALLINN MAY 2010

In May 2010, 213,300 tourists stayed in Estonian accommodation establishments, 56% of whom stayed in Tallinn.

**Arrivals in Tallinn: 119,500 (+14%)\***  
**Bednights in Tallinn: 204,200 (+18%)**

- **Foreign tourists: 107,000 (+13%)**  
**Bednights of foreign tourists: 185,200 (+18%)**
- **Domestic tourists: 12,500 (+21%)**  
**Bednights of domestic tourists: 19,000 (+23%)**

### Growth in bednights in Finland, Russia and Germany

**Finland:** 85,500 nights (+26%)  
**Russia:** 17,700 nights (+45%)  
**Germany:** 13,100 nights (-2%)  
**Sweden:** 9,700 nights (-15%)  
**Norway:** 8,100 nights (-21%)  
**Great Britain:** 6,100 nights (-8%)  
**Latvia:** 5,000 nights (+11%)

**USA:** 4,400 nights (+17%)  
**France:** 3,500 nights (+15%)  
**Italy:** 3,000 nights (+24%)  
**Spain:** 1,400 nights (-9%)  
**Japan:** 1 300 nights (-25%)  
**Belgium:** 1 200 nights (-19%)  
**China:** 500 nights (-10%)

### Leisure travel continue to rise

76% of **foreign tourists** stay in Tallinn for leisure purposes, 21% for business, and 3% for attending a conference. Visits for other purposes remain less than 1%.

55% of **domestic tourists** visit for leisure 37% for business purposes and 5% for attending conferences and 3% for other purposes.

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\* comparison May 2009, %

### Rise in length of stay

**The average length of stay for tourists was 1.71 nights (+4%).**

Stays by domestic tourists: 1.52 nights (+2%), foreign tourists: 1.73 nights (+4%).

Among primary markets, Norwegian tourists spent the longest time in Tallinn (2.52 nights), and Finns spent the shortest time (1.49 nights).

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

358 accommodation establishments offered accommodation services for tourists. The room occupancy rate was 56%, 8 percentage points higher than in May of the previous year.

The average cost of a bednight in an accommodation establishment was 503 kroons, which is 15% less expensive compared to May 2009.

### Travelers by air and by sea increased

**124,714 passengers** passed through **Tallinn Airport** in May 2010 (+8%). Passengers in **Tallinn Old Harbour** totalled **690,100 (+4%)**, of whom 83% were on the Tallinn-Helsinki line, 11% on the Tallinn-Stockholm line and 6% cruise Passengers.

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

Altogether 13,500 visitors (-17%) **visited Tallinn's two tourism information centres**. Tallinn tourism portal received 90,000 visits in May, i.e 8% more than in May 2009.

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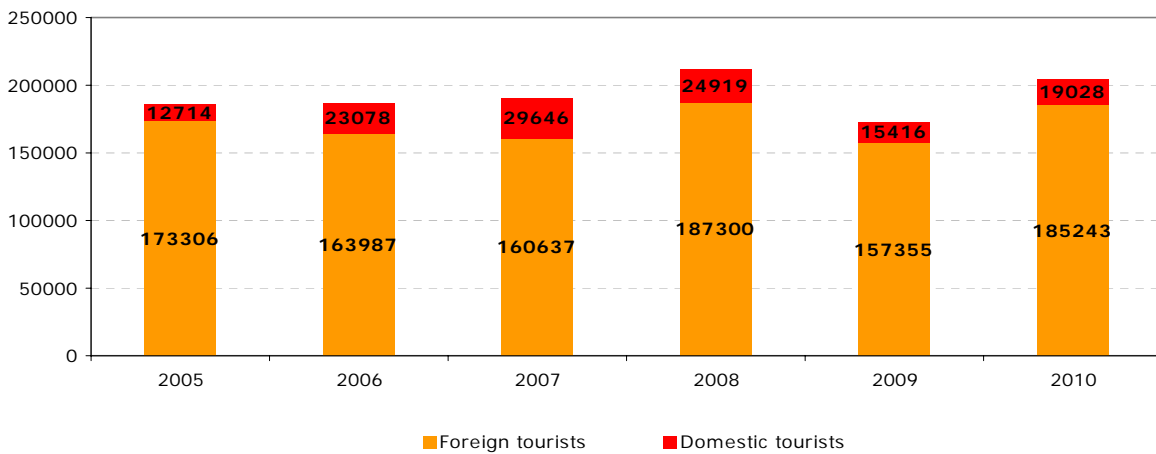
\*\* Average cost of a bednight — the average cost of one guest night in all types of accommodation establishment, includes value-added tax and the cost of breakfast if it is sold with accommodation services.

### Tourists staying in Tallinn's accommodation establishments

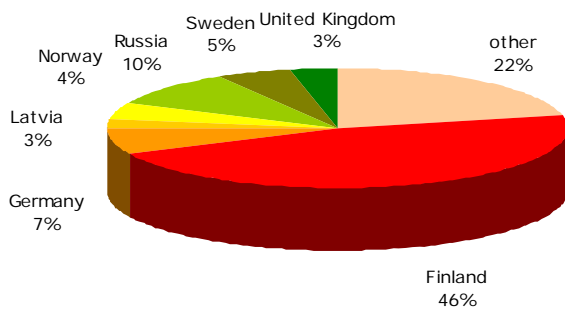
A total of 119,500 tourists stayed in Tallinn's accommodation establishments (14% more tourists compared with same month in 2009). Altogether a total of 107,000 foreign tourists used the services of accommodation establishments. The number of domestic tourists also increased, numbers accommodated grew 21%, for a total of 12,500.

Bednights spent by tourists also rose, with a total of 204,200 bednights (+18%) spent in Tallinn's accommodation establishments. Bednights by foreign tourists rose by 18% (totalling 185 200 bednights) and bednights by Estonian residents were also up by 23% (total 19,000 bednights).

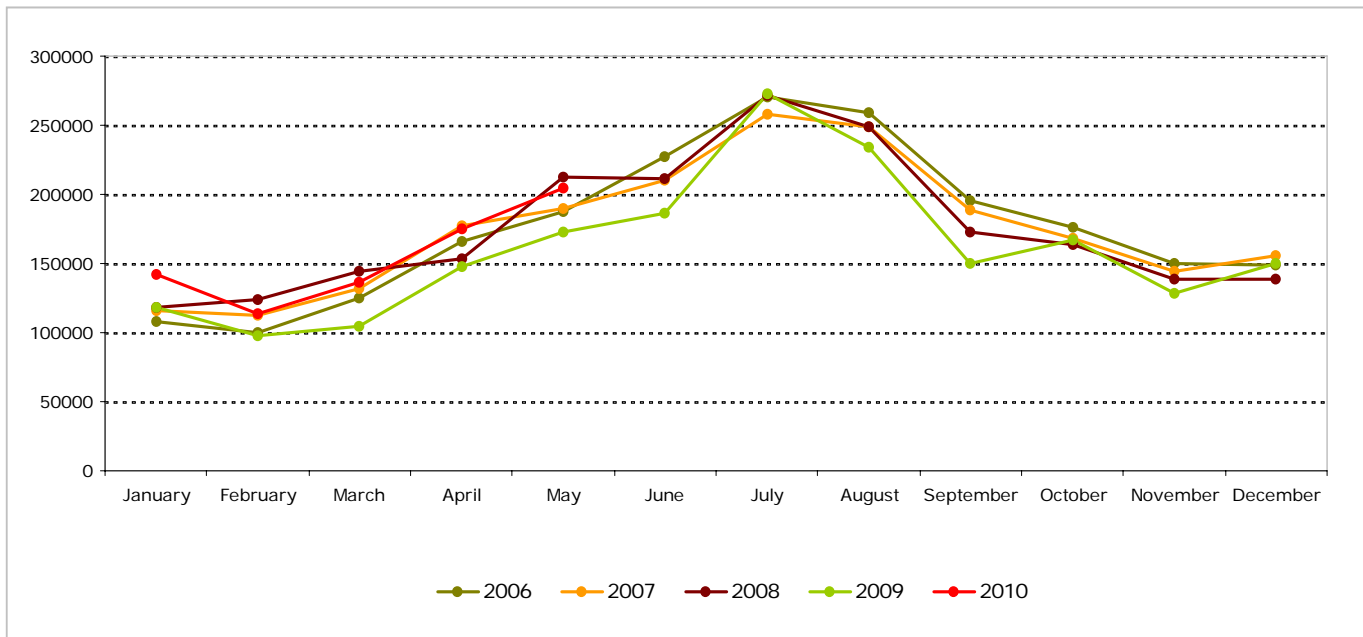
Bednights spent in Tallinn's accommodation establishments in May



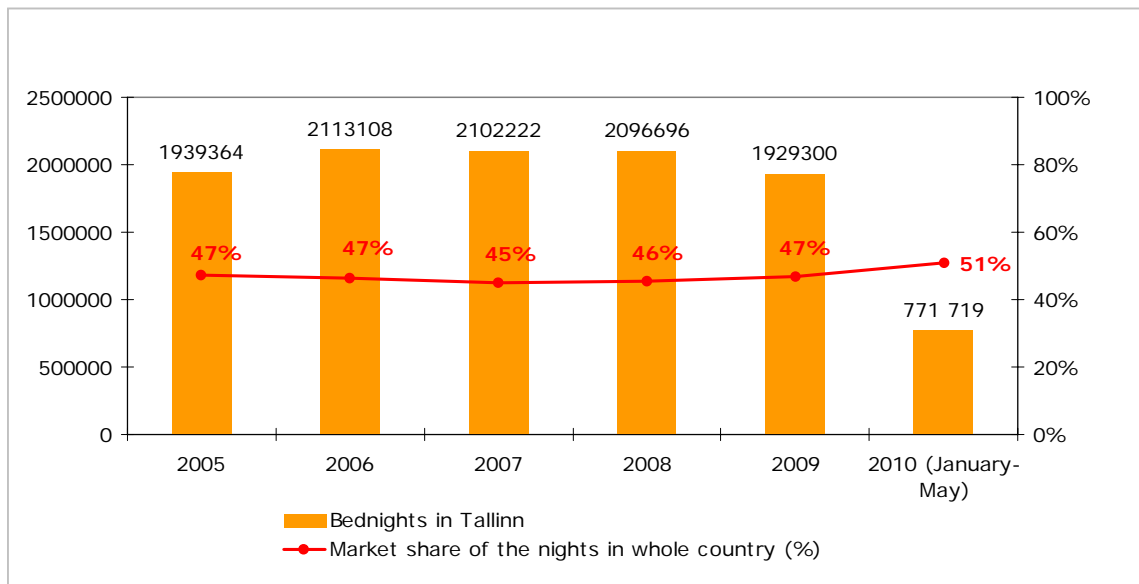
Bednights from Tallinn's primary target markets as share of all foreigners' nights, May 2010



### Monthly bednights in Tallinn



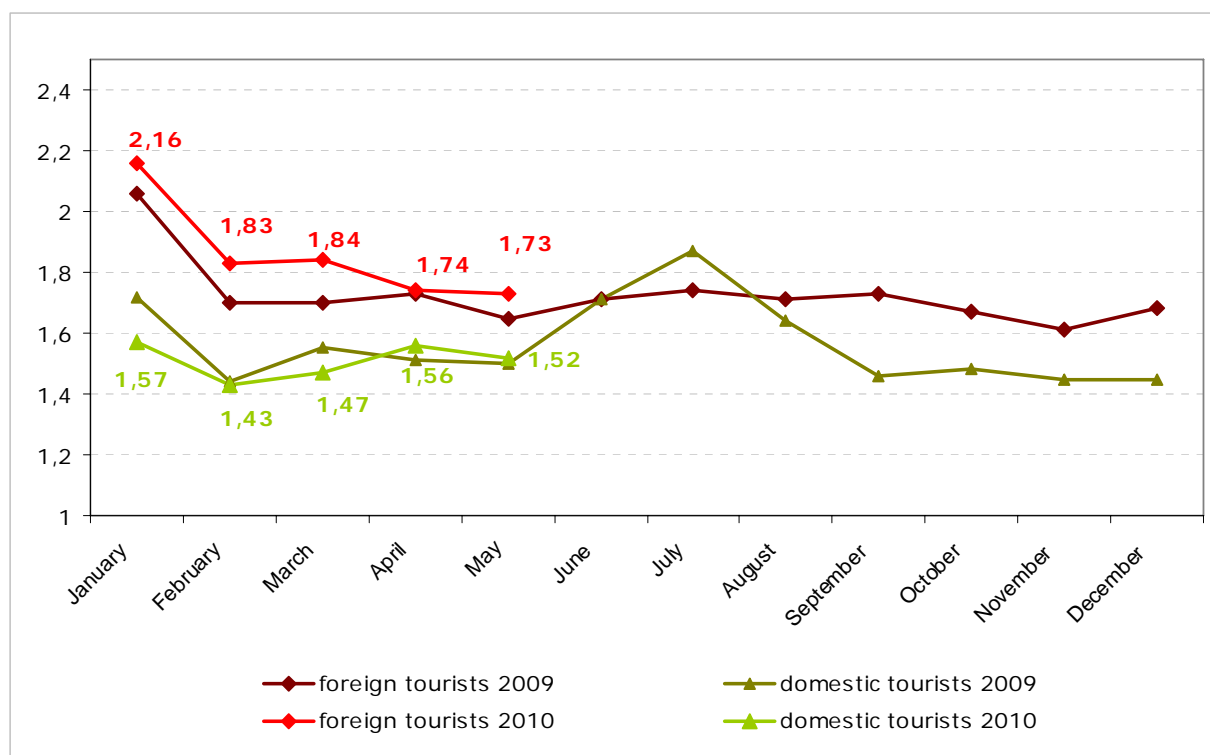
### Total bednights in Tallinn and market share of the bednights in Estonia



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-May)	771 719	51%	+131 006	+20%

Excluding day traveller, visitors spent an average of 1.71 nights in May (+4%). The average trip length among foreign tourists rose by 4%, from 1.65 to 1,73 nights. The length of stay for domestic tourists was 1.52 nights (+2%).



Source: Statistics Estonia

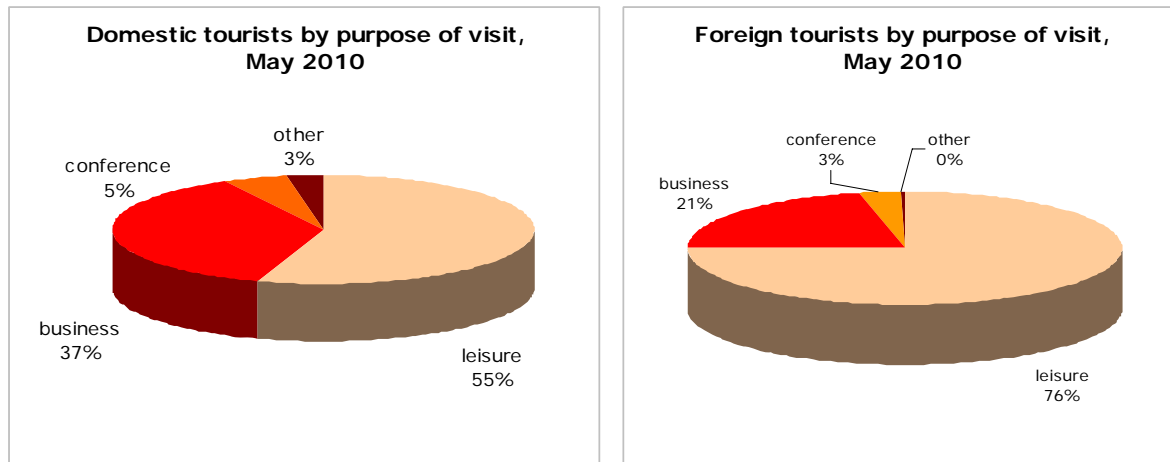
## Arrivals, numbers of bednights and length of stay in May 2010

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of Stay
		Number	%		Number	%	
Albania	37	34	1133	66	54	450	1,78
Austria	297	-139	-32	772	-79	-9	2,60
Belgium	511	-49	-9	1 226	-291	-19	2,40
Bulgaria	116	60	107	486	342	238	4,19
Croatia	155	137	761	285	240	533	1,84
Czech Republic	291	-124	-30	623	-126	-17	2,14
Cyprus	19	2	12	79	5	7	4,16
Denmark	878	-143	-14	1 896	-310	-14	2,16
<b>Finland</b>	<b>57 395</b>	<b>7 436</b>	<b>15</b>	<b>85 477</b>	<b>17 351</b>	<b>25</b>	<b>1,49</b>
France	1 236	-95	-7	3489	448	15	2,82
<b>Germany</b>	<b>6 707</b>	<b>1 934</b>	<b>41</b>	<b>13 108</b>	<b>3 655</b>	<b>39</b>	<b>1,95</b>
Greece	196	50	34	516	169	49	2,63
Hungary	190	37	24	601	248	70	3,16
Iceland	70	42	150	158	88	126	2,26
Ireland	152	3	2	311	-29	-9	2,05
Italy	1 272	221	21	2 987	577	24	2,35
<b>Latvia</b>	<b>3 131</b>	<b>177</b>	<b>6</b>	<b>4 952</b>	<b>507</b>	<b>11</b>	<b>1,58</b>
Lithuania	1 970	225	13	3 235	162	5	1,64
Luxembourg	92	33	56	193	108	127	2,10
Malta	32	20	167	58	26	81	1,81
Netherlands	753	48	7	1 913	329	21	2,54
<b>Norway</b>	<b>3 209</b>	<b>-505</b>	<b>-14</b>	<b>8 085</b>	<b>-2 115</b>	<b>-21</b>	<b>2,52</b>
Poland	1 288	-89	-6	2 312	54	2	1,80
Portugal	164	49	43	436	116	36	2,66
Romania	122	1	1	274	70	34	2,25
<b>Russia</b>	<b>8 954</b>	<b>2 572</b>	<b>40</b>	<b>17 726</b>	<b>5 529</b>	<b>45</b>	<b>1,98</b>

Country of residence	Arrivals	Change 2009/2010		Bednights	Change 2009/2010		Length of Stay
		Number	%		Number	%	
Slovakia	84	33	65	156	61	64	1,86
Slovenia	27	-10	-27	39	-64	-62	1,44
Spain	601	-201	-25	1436	-141	-9	2,39
<b>Sweden</b>	<b>5 986</b>	<b>-1171</b>	<b>-16</b>	<b>9 707</b>	<b>-1754</b>	<b>-15</b>	<b>1,62</b>
Switzerland	489	120	33	885	144	19	1,81
Turkey	308	91	42	724	367	103	2,35
Ukraine	436	105	32	894	65	8	2,05
<b>United Kingdom</b>	<b>2 686</b>	<b>-328</b>	<b>-11</b>	<b>6 053</b>	<b>-508</b>	<b>-8</b>	<b>2,25</b>
Other European countries	2 001	833	71	3 426	1688	97	1,71
Total Africa	71	-13	-15	233	74	47	3,28
..South Africa	12	-32	-73	44	-33	-43	3,67
Total Asia	1 690	70	4	3 161	-132	-4	1,87
..China	194	42	28	484	-56	-10	2,49
..Japan	691	-217	-24	1317	-439	-25	1,91
..South-Korea	321	267	494	395	254	180	1,23
United States	1 908	455	31	4 355	627	17	2,28
Canada	194	-93	-32	482	-96	-17	2,48
Total Central and South America	368	220	149	728	446	158	1,98
..Brasilia	257	187	267	520	420	420	2,02
Australia, Oceania	375	-211	-36	834	-318	-28	2,22
..Australia	311	-177	-36	692	-236	-25	2,23
Other countries	538	205	62	866	301	53	1,61
<b>Total foreign tourists</b>	<b>106 999</b>	<b>12 042</b>	<b>13</b>	<b>185 243</b>	<b>27 888</b>	<b>18</b>	<b>1,73</b>
<b>Domestic tourists</b>	<b>12 492</b>	<b>2 193</b>	<b>21</b>	<b>19 028</b>	<b>3 612</b>	<b>23</b>	<b>1,52</b>
<b>Countries of residence total</b>	<b>119 491</b>	<b>14 235</b>	<b>14</b>	<b>204 271</b>	<b>31 500</b>	<b>18</b>	<b>1,71</b>

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-May)	310 363	73	101 047	23	13 467	3	5 682	1

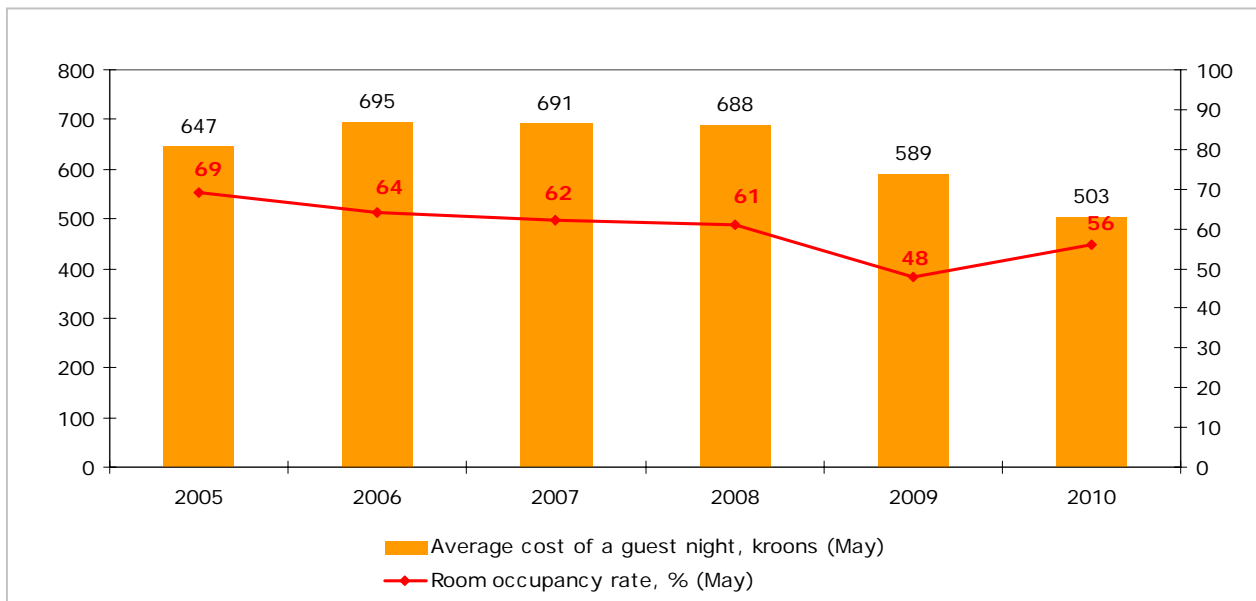
Source: Statistics Estonia

## 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 (May)	58	358	6 533	7 608	12 787	15 415

Source: Tallinn City Tourist Office &amp; Convention Bureau

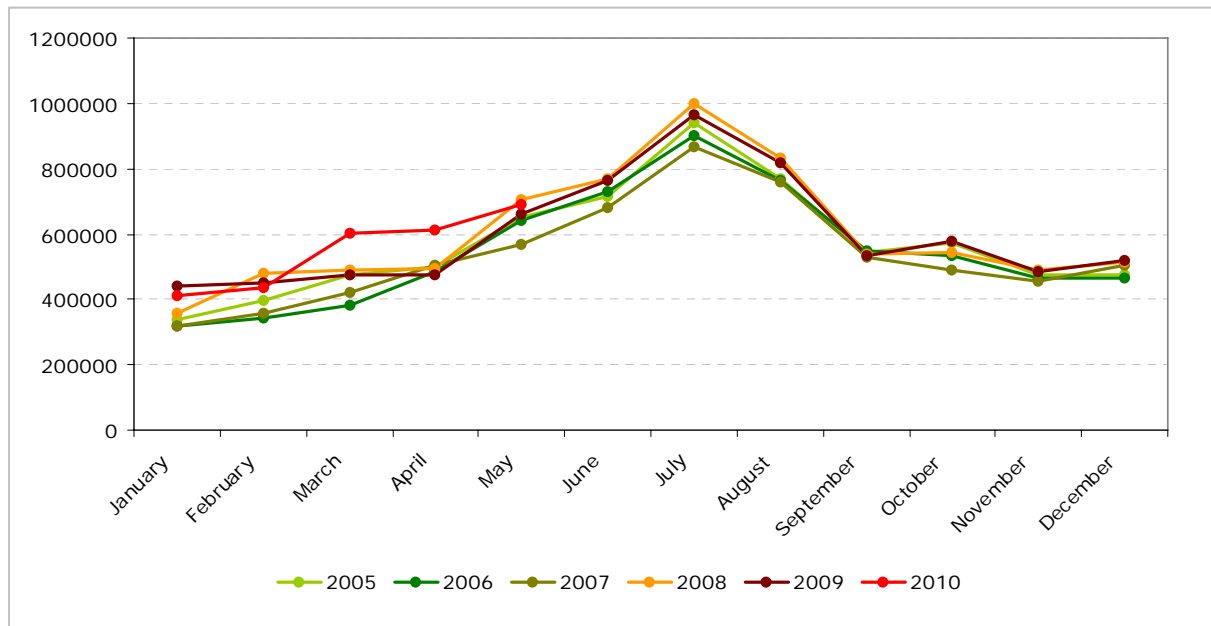
### The average price of accommodation and room occupancy rate in Tallinn (in May 2005-2010)



	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-May)	43	487

Source: Statistics Estonia

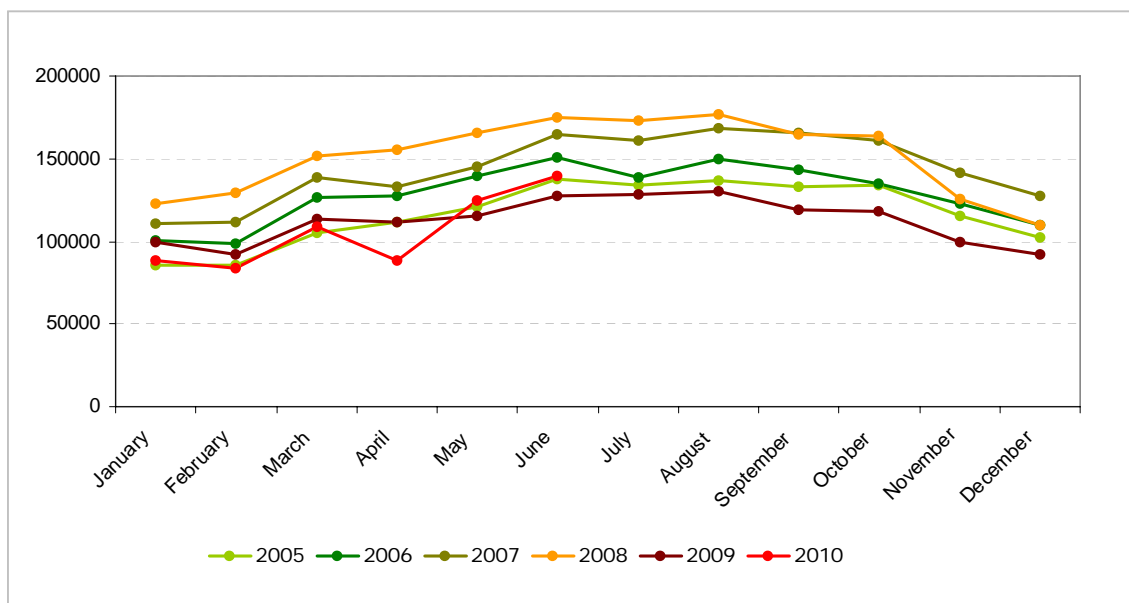
## Passenger traffic (arrivals and departures) at Tallinn Old Harbour (2005-2010)



	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		
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		
<b>TOTAL</b>	<b>6 854 949</b>	<b>6 587 568</b>	<b>6 458 244</b>	<b>7 214 342</b>	<b>7 235 486</b>	<b>3 556 147</b>	

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	<b>88 528</b>	-11
February	90 295	82 600	-8	1 415	1 340	-5	91 710	<b>83 940</b>	-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	137 007	+10	2 257	2 287	+1	127 058	139294	+10
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			1624			92 506		
<b>TOTAL</b>	<b>1 323 907</b>	<b>624 394</b>		<b>22 329</b>	<b>10 166</b>		<b>1 346 236</b>	<b>634 560</b>	

Source: Tallinn Airport

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