

TOURISM IN TALLINN

February 2009

In February 2009, 121,400 tourists stayed in Estonian accommodation establishments, 49% of whom stayed in Tallinn.

Arrivals in Tallinn: 58,900 (-17%)*
Bednights in Tallinn: 97,800 (-21%)

- **Foreign tourists: 49,000 (-14%)**
Bednights of foreign tourists: 83,500 (-17%)
- **Domestic tourists: 9,900 (-29%)**
Bednights of domestic tourists: 14,300 (-38%)

Bednights down in February

Primary markets:

Finland: 42,500 nights (-14%)
Russia: 6,000 nights (-12%)
Sweden: 4,700 nights (-2%)
Great Britain: 4,500 nights (-42%)
Norway: 4,300 nights (-30%)
Latvia: 3,200 nights (-9%)
Germany: 2,400 nights (-29%)

Secondary markets:

USA: 1,400 nights (-26%)
Italy: 1,300 nights (-12%)
France: 1,000 nights (-15%)
Spain: 566 nights (-16%)
China: 173 nights (+104%)
Japan: 123 nights (-41%)

Decline in length of stay

The average length of stay for tourists in February was 1.66 nights (-5%).

Foreign travelers: 1.70 nights (-4%),
 Domestic travelers: 1.44 nights (-13%).

Among the main markets, German tourists stay for the longest periods (2.51 nights), and Finns stay for the shortest length of

time (1.47 nights).

73% of accommodated tourists arrived for holidays

76% of foreign tourists stay in Tallinn for leisure purposes, 20% for business, 4% for attending a conference and 1% for other purposes.

59% of domestic tourists visit for purposes of leisure, 30% for business, 9% for attending conferences and 2% for other purposes.

Occupancy rate and average price** of accommodation decreased

In February 413 accommodation establishments offered accommodation services for tourists; 7 173 rooms and 14 441 beds were available for guests.

The room occupancy rate was 31%, staying 8% lower than in February of the previous year.

The average cost of a guest night in an accommodation establishment was 551 kroons, which was by 23 kroons less expensive compared to February 2008.

International air traffic and ship traffic decreased

The number of passengers at Tallinn Airport was 91 700, down 29% compared with the February year before.

The number of passengers passing through the Port of Tallinn totaled 450 500, down by 7% compared with last year February.

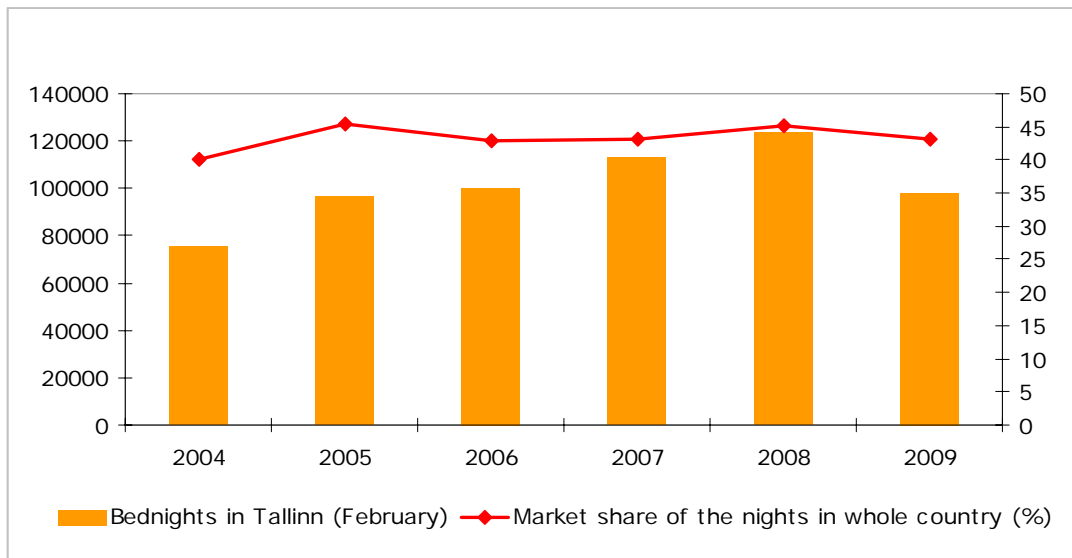
Passengers:

Finnish traffic: 385 533
Swedish traffic: 64 377
Other passengers: 582

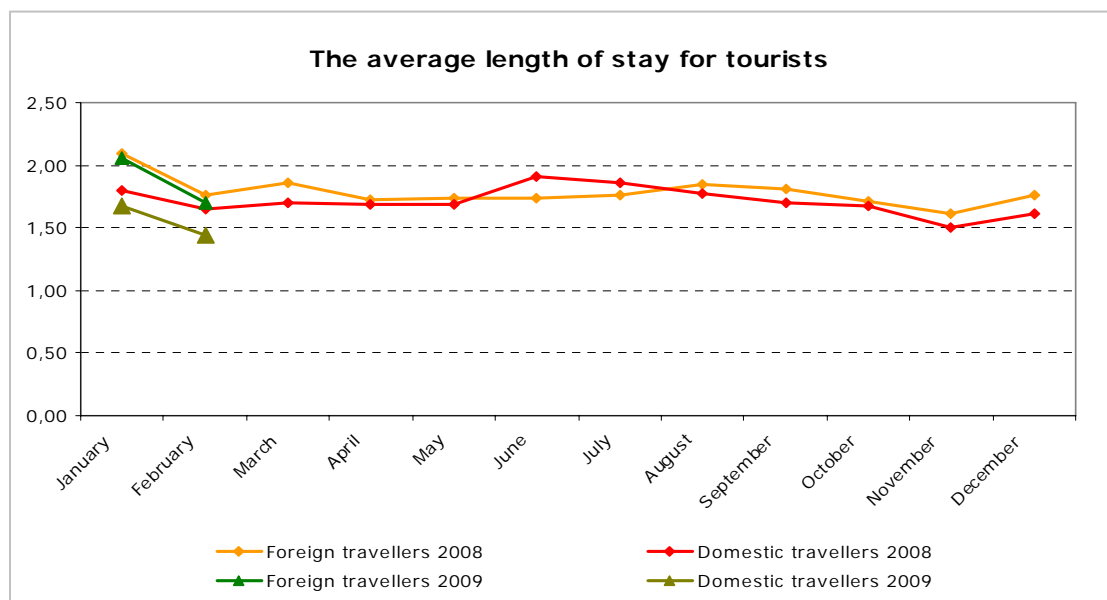
** Average cost of a guest night — the average cost of one guest night in all types of accommodation establishment, includes value-added tax and the cost of breakfast if it is sold with accommodation services.

* comparison February 2008, %

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



	Bednights in Tallinn	Market share of the nights in whole country (%)	Change (%) from previous years
2004	1 688 857	45	32
2005	1 939 364	47	15
2006	2 113 108	47	9
2007	2 102 222	45	-1
2008	2 096 696	46	0
2009 (January+ February)	216 470	47	-11%



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

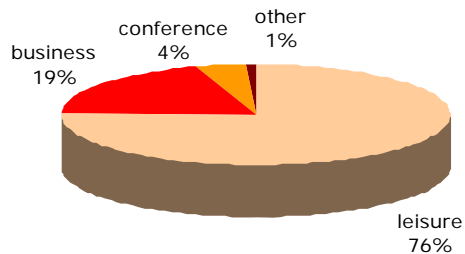
Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Albania	3	-18	-86	10	-23	-70	3,33
Austria	152	-33	-18	413	-38	-8	2,72
Belgium	186	-65	-26	491	-35	-7	2,64
Bulgaria	60	15	33	234	155	196	3,90
Croatia	9	-22	-71	77	-6	-7	8,56
Czech Republic	129	-37	-22	333	-138	-29	2,58
Cyprus	13	-10	-43	37	-11	-23	2,85
Denmark	471	-309	-40	996	-581	-37	2,11
Finland	28 902	-3 987	-12	42 451	-6 671	-14	1,47
France	439	-171	-28	1 024	-175	-15	2,33
Germany	962	-501	-34	2 410	-988	-29	2,51
Greece	89	24	37	238	107	82	2,67
Hungary	67	-13	-16	180	-98	-35	2,69
Iceland	13	-23	-64	20	-45	-69	1,54
Ireland	106	-13	-11	259	-24	-8	2,44
Italy	527	-111	-17	1 307	-178	-12	2,48
Latvia	2 194	-261	-11	3 262	-322	-9	1,49
Lithuania	1 264	-170	-12	2 183	-547	-20	1,73
Luxembourg	35	12	52	89	21	31	2,54
Malta	14	5	56	42	23	121	3,00
Netherlands	334	-84	-20	783	-174	-18	2,34
Norway	1 771	-612	-26	4 328	-1822	-30	2,44
Poland	402	-68	-14	935	20	2	2,33
Portugal	76	13	21	175	46	36	2,30
Romania	48	9	23	140	46	49	2,92
Russia	3 282	-461	-12	5 976	-836	-12	1,82

Country of residence	Arrivals	Change 2008/2009		Bednights	Change 2008/2009		Length of Stay
		Number	%		Number	%	
Slovakia	28	-9	-24	85	-5	-6	3,04
Slovenia	18	-9	-33	85	12	16	4,72
Spain	297	20	7	566	-109	-16	1,91
Sweden	2 956	340	13	4 675	-116	-2	1,58
Switzerland	157	-63	-29	368	-69	-16	2,34
Turkey	83	45	118	186	85	84	2,24
Ukraine	201	-77	-28	565	-128	-18	2,81
United Kingdom	1 949	-1238	-39	4 531	-3 208	-41	2,32
Other European countries	701	142	25	1 287	-136	-10	1,84
Total Africa	17	-41	-71	42	-83	-66	2,47
..South Africa	9	1	13	17	3	21	1,89
Total Asia	342	28	9	698	-187	-21	2,04
..China	57	38	200	173	88	104	3,04
..Japan	70	-14	-17	123	-84	-41	1,76
..South-Korea	28	0	0	40	-11	-22	1,43
United States	434	-177	-29	1 372	-493	-26	3,16
Canada	101	28	38	235	86	58	2,33
Total Central and South America	54	-31	-36	96	-179	-65	1,78
..Brasilia	20	3	18	39	-59	-60	1,95
Australia, Oceania	97	-26	-21	165	-118	-42	1,70
..Australia	73	-40	-35	124	-129	-51	1,70
Other countries	74	-43	-37	131	-265	-67	1,77
Domestic tourists	9 918	-4 033	-29	14 326	-8 751	-38	1,44
Total foreign tourists	49 057	-8 002	-14	83480	17 207	-17	1,70
Countries of residence total	58 975	-12 035	-17	97806	-25 958	-21	1,66

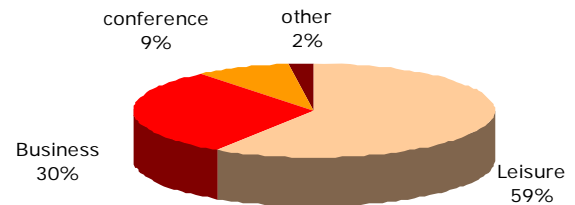
Source: Statistics Estonia

Purpose of visit

Foreign tourists by purpose of visit, February 2009



Domestic tourists by purpose of visit, February 2009



	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+ February)	84 038	71	25 009	21	8 007	7	1 507	1

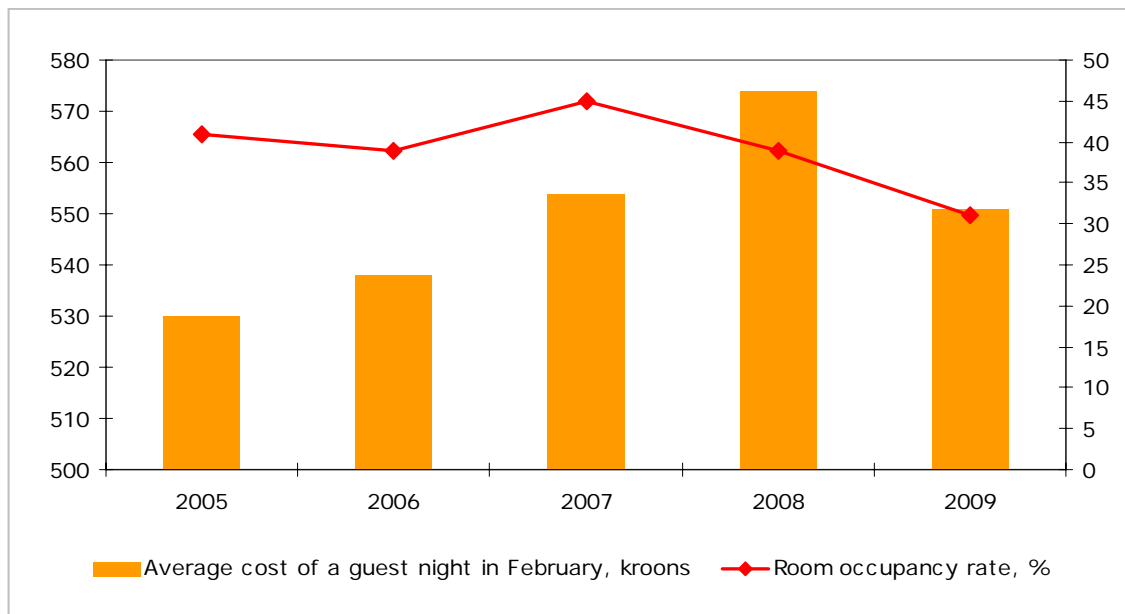
Source: Statistics Estonia

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 (28.02.2009)	53	413	6 110	7 173	11 884	14 441

Source: Tallinn City Tourist Office & Convention Bureau

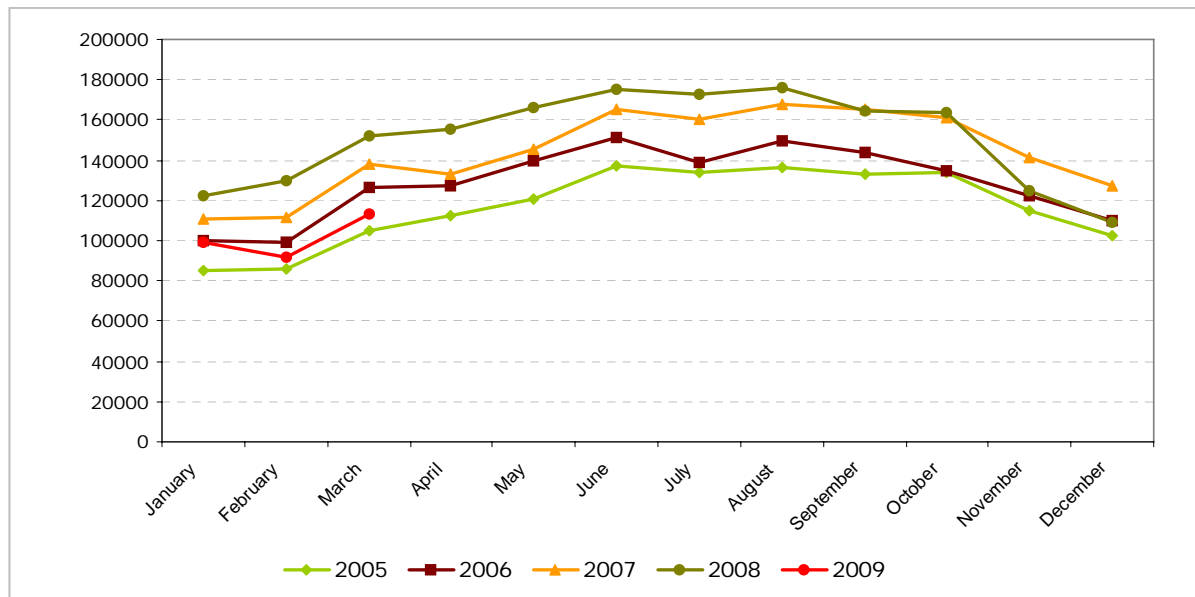
The average price of accommodation and room occupancy rate in Tallinn



	Room occupancy rate, %	Average cost of a guest night, kroons
2005	60	582
2006	58	598
2007	55	604
2008	50	601
2009 (January+ February)	32	543

Source: Statistics Estonia

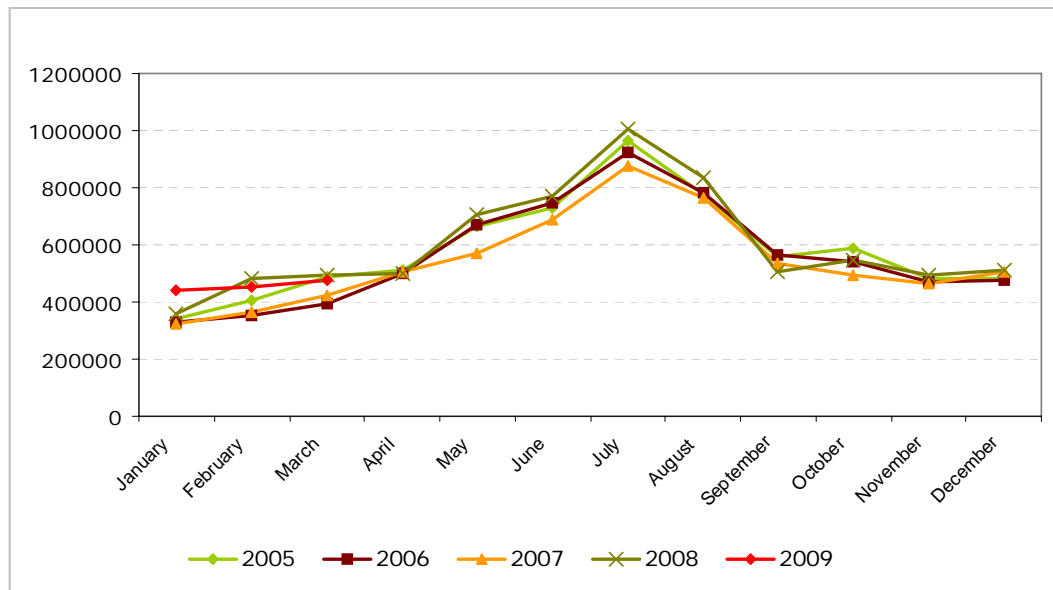
Passenger air traffic at Tallinn Airport (2005-2009)



	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	91 701	-29
March	150 601	111 984	-26	1 492	1 645	10	152 093	113 629	-25
April	153 504			1 629			155 133		
May	164 018			1 953			165 971		
June	173 145			2 167			175 312		
July	170 046			2 677			172 723		
August	174 069			2 339			176 408		
September	162 538			1 739			164 277		
October	161 162			2 276			163 438		
November	123 919			1 205			125 124		
December	107 799			1 535			109 334		
TOTAL	1 790 063	299 954		21 473	4 726		1 811 536	304 680	

Source: Tallinn Airport

Passenger traffic (arrivals and departures) at Port of Tallinn (2005-2009)



	2005	2006	2007	2008	2009	Change (2008/2009)
January	344 058	327 461	322 830	359 608	441 427	23%
February	406 475	352 610	362 252	482 160	450 492	-7%
March	489361	395 191	424 249	495 223	477 995	-4%
April	512 250	502 168	506 908	498 541		
May	663 928	672 852	572 854	708 267		
June	726 927	748 545	688 037	773 338		
July	961 773	926 267	873 622	1 004 059		
August	788 759	785 254	765 194	834 852		
September	556 699	562 076	536 508	540 157		
October	587 422	541 020	494 367	544 779		
November	485 288	472 523	461 773	492 280		
December	484 591	474 182	505 700	514 102		
TOTAL	7 007 558	676 149	6 514 294	7 247 366	891 919	

Source: Port of Tallinn

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