

Tourism in Tallinn 2003

2,69 million foreign visitors to Tallinn

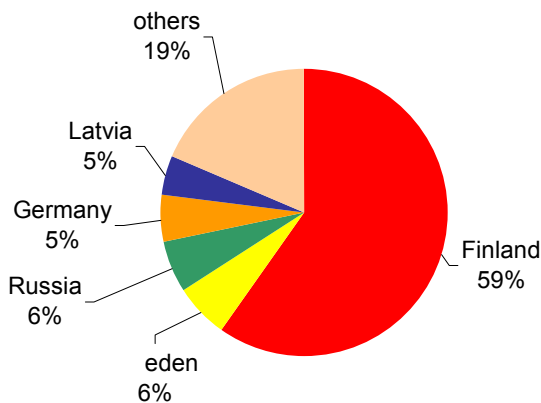
Foreign visitor arrivals

In 2003 the number of foreign visitors' arrivals to Tallinn amounted to 2,69 million. 67% of all trips were same-day trips and 33% overnight trips.

Percentage of Finns is diminishing, the share of West Europeans and Russians is rising

Foreign tourists by country of residence

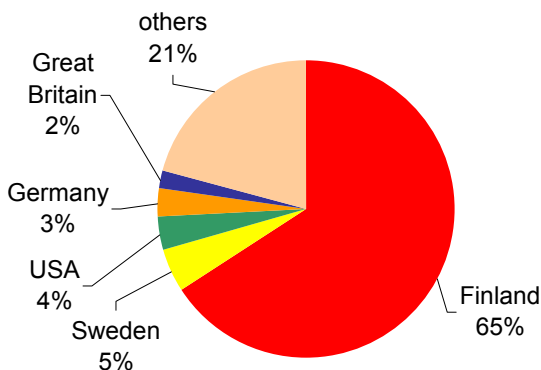
Finns still dominate with 64% of all foreign visitors and with 60% of overnight visitors. The share of Finns among overnight visitors was highest in 2001, and then started declining. The number of foreign visitors from Western and Southern European states and Russia has started growing rapidly.



Foreign tourists in Tallinn 2003 / TOP 5

| Country of residence | Number of tourists |
|----------------------|--------------------|
| 1. Finland | 524 405 |
| 2. Sweden | 55 498 |
| 3. Russia | 51 102 |
| 4. Germany | 45 105 |
| 5. Latvia | 40 500 |

Source: Statistical Office of Estonia, Tallinn foreign visitors' survey 2003



Foreign same-day visitors in Tallinn 2003 / TOP 5

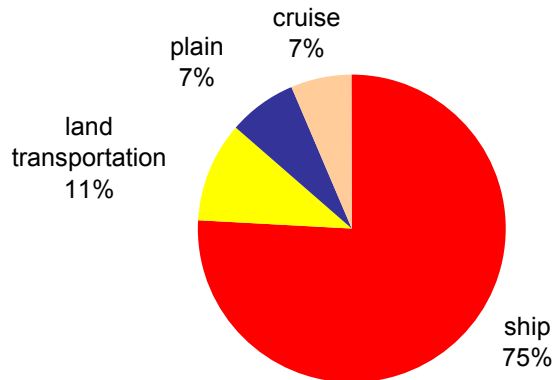
| Country of residence | Number of same-day visitors |
|------------------------------|-----------------------------|
| 1. Finland | 1 190 345 |
| 2. Sweden | 86 443 |
| 3. USA | 63 992 |
| 4. Germany | 55 805 |
| 5. Great Britain and Ireland | 38 472 |

Source: Estonian Board of Boarder Guard, Statistical Office of Estonia, Tallinn foreign visitors' survey 2003

Foreign visitor arrivals by form of transportation

82% of foreign visitors arrive in Tallinn by ship

Due to Tallinn's seaside location, the majority of visitors to Tallinn arrive by ship, followed by road and rail, and air. With the launch of new airlines, the number of visitors arriving by ship has begun declining in recent years in favor of arrivals by air.



Source: Estonian Board of Boarder Guard, Estonian Tourist Board

Purpose of trip

82% of visitors are coming to Tallinn for a holiday, 16% are on a business trip. In comparison to 2002, the number of visitors to Tallinn on business was up and visitors on holiday, down. In 2003, fewer people came solely for shopping, yet the number of people on short sightseeing trips rose. One in ten foreign visitors were in Tallinn to visit friends and relatives. The peak season for vacationers is in the summer, with active periods in spring and fall as well. For Russians, the most popular time of year for seeing Tallinn is the end of the year. Business trips occur more often in spring and the last months of the year.



Source: Tallinn foreign visitors' survey 2003

Fewer spend the night at friends' and relatives', more seek commercial lodging.

Foreign tourists by type of accommodation

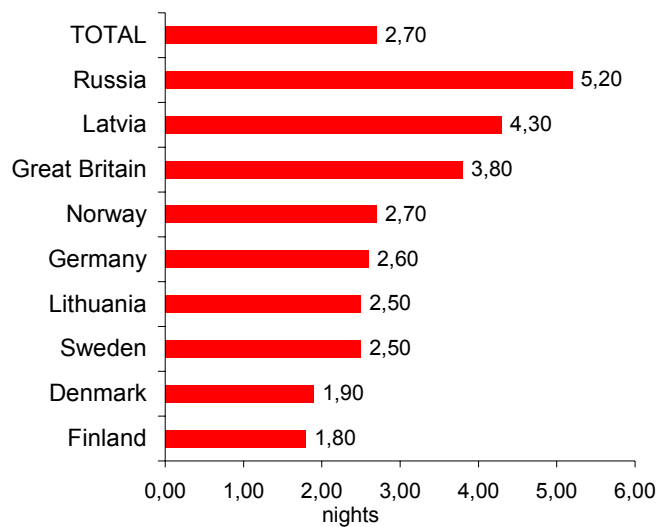
Seventeen per cent of foreign tourists spend the night in Tallinn at the homes of friends or relatives or some other form of non-paid accommodation. Tourists from Russia, Latvia and Lithuania spend the night with family or friends the most often. For paid accommodation, middle-range hotels are preferred; 41% of visitors to Tallinn spend the night at one.



Source: Tallinn foreign visitors' survey 2003

Russians make the longest trips to Tallinn, Finns make the shortest trips

The average length of stay in Tallinn



Source: Tallinn foreign visitors' survey 2003

Accommodation capacity and occupancy rates in Tallinn

There are 7,835 beds in Tallinn's hotels as of 1 January 2004.

**Room occupancy 58%,
bed occupancy 49%**

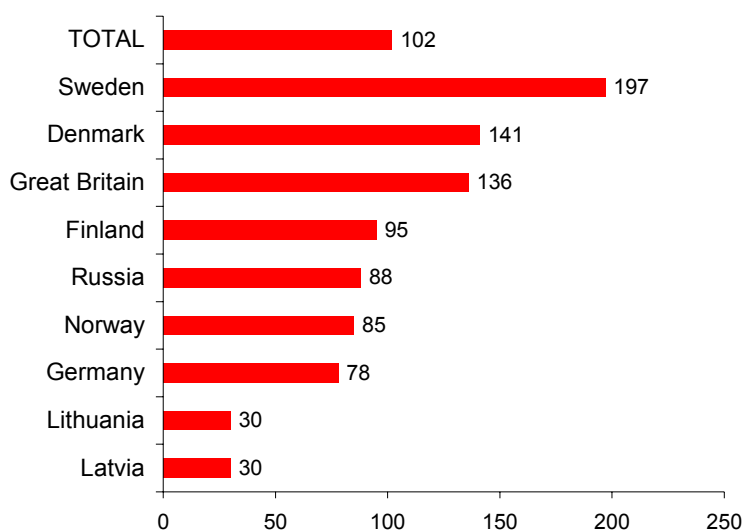
The number of beds in Tallinn's hospitality sector has doubled in the last eight years. In 2003, 1,077 beds were added, a 16% increase. As of December 2003 there were 148 commercial lodging companies in Tallinn, 37 hotels, 18 guest houses, 11 hostels, 74 short-term rental apartments and 8 home accommodations. An additional 10% increase in beds is forecast for 2004. Increasing demand accompanied the rise in beds—occupancy at hotels was 58% in 2003 and bed occupancy was 49%.

Foreign visitors spending

The foreign visitor's average spending per night is 102 Euros and per trip is 243 Euros

According to the 200 Tallinn foreign visitors' survey, the foreign visitor's average spending per night was 102 Euros in Tallinn. Swedes, Danish and British spent the most, Latvians and Lithuanians least. People spending the night at paid accommodation spent an average of 127 Euros, while people staying for free spent 66 and one-day visitors spent 91 Euros. Considering the amount of time spent in Tallinn, Britons spent the most per trip (490 Euros) followed by Russians (455) and Swedes (278).

Foreign visitor spending (Euros per night)



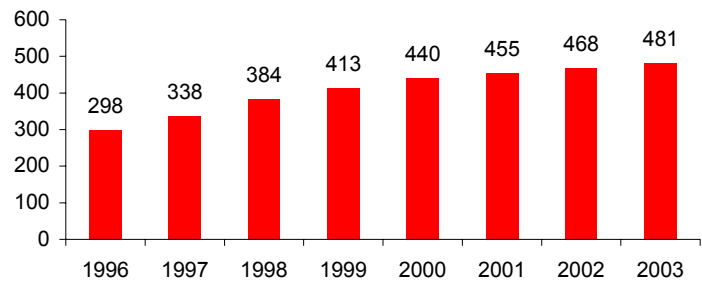
Source: Tallinn foreign visitors' survey 2003

Tourism revenues

Revenue from international travel has risen 3%

It is estimated that 80% of Estonia's total travel receipts (i.e., all expenditures of foreign visitors in Tallinn related to their trip, including accommodations, food and drink, entertainment and shopping) comes from Tallinn – 481 million Euros in 2003.

**International travel receipts, 1996-2003
(million Euros)**



Source: Bank of Estonia