

Tourism in Tallinn 2004

Foreign visitors

Tallinn received an estimated 3 million foreign visitors in 2004. This is 310,000 people or 12% more than in 2003. There was record growth in the number of overnight trips, reaching 1.17 million (a growth of 33% or 290,000 trips). 82% or 957,000 foreign tourists stayed in paid accommodation facilities in Tallinn, while 18% or 213,000 foreign tourists stayed in non-paid accommodation, mainly staying with friends or relatives. Compared to 2003, the number of day-trips remained approximately the same or grew only slightly, amounting to about 1.8 to 2 million. 39% of trips included an overnight stay.

Foreign tourists by country of residence

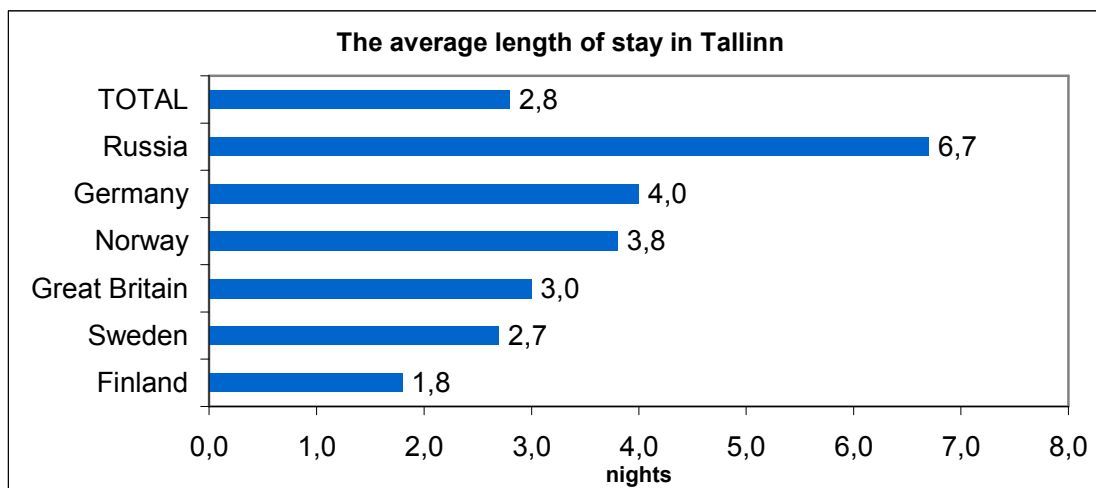
The largest increase was in the number of visitors from Finland. The numbers of visitors from Germany, Sweden, Latvia, Russia and Italy also showed considerable growth. Finns still accounted for over half of Tallinn's foreign visitors (61% of all visitors and 54% of all overnight visitors). At the same time though, the number of foreign visitors from other countries has increased even more than the number of trips made by Finns, thus the percentage of Finnish tourists among all the visitors to Tallinn has decreased. The number of trips made by Swedes has recovered, topping the previous record result from 2000. Tourism in Tallinn in 2004 was also characterized by a very sharp increase in interest among tourists from Southern Europe (Italy, France, Spain), as well as an ever-growing popularity among Russian tourists.

	Country of residence	Overnight trips 2004	Percentage of all overnight trips 2004, %	Change 2003/2004 total / %
1.	Finland	635,000	54%	+111,000 / +21%
2.	Sweden	69,000	6%	+14,000 / +25%
3.	Germany	66,000	6%	+21,000 / +47%
4.	Russia	63,000	5%	+12,000 / +24%
5.	Latvia	54,000	5%	+14,000 / +33%
6.	Great Britain	39,000	3%	+9,000 / +30%
7.	Norway	34,000	3%	+7,000 / +26%
8.	Lithuania	23,000	2%	+8,000 / +53%
9.	Italy	22,000	2%	+11,000 / +100%
10.	USA	18,000	2%	+6,000 / +50%
11.	France	12,000	1%	+6,000 / +100%

Source: Statistical Office of Estonia, Tallinn Foreign Visitor's Survey

The length of stay

On average, foreign tourists stayed in Tallinn 2.8 nights. The duration of overnight trips has not changed in recent years (2.9 nights in 2002, 2.7 nights in 2003). The shortest trips are made by Finnish and the longest by Russian tourists. Compared to 2003, Finnish tourists stayed just as long last year, while British tourists stayed for a slightly shorter period. Trips by tourists from other significant target countries were longer last year.



Source: Tallinn Foreign Visitor's Survey 2004

Accommodation facilities in Tallinn

As of December 31, 2004, there were 247 accommodation establishments in Tallinn, 43 of them hotels. There were 5,060 rooms and 9,474 beds. Last year the number of accommodation facilities in Tallinn grew by 99, and accommodation capacity by 21% or 1,639 beds. The room and bed occupancy rates were the same compared to 2003, so the demand has grown as fast as the capacity. In 2004, accommodation providers in Tallinn received a revenue of 60 million Euros from the sale of accommodation services to foreign visitors (an increase of 14 million Euros, or 31% compared to 2003).

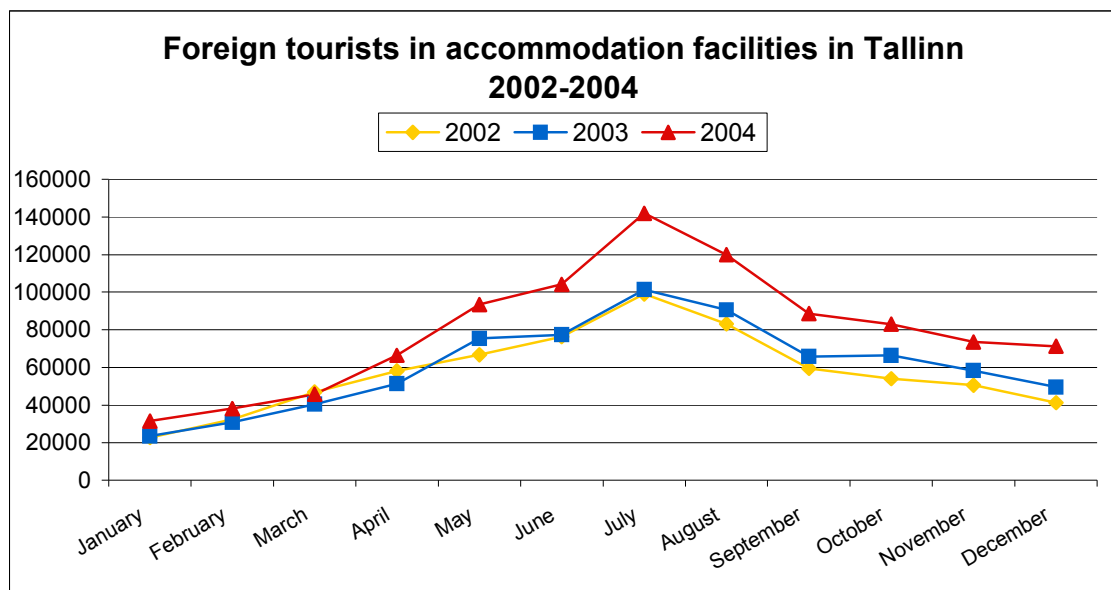
	2002	2003	2004	Change 2003/2004 total ... / %
Number of accommodation facilities	107	148	247	+99 / +67%
incl. hotels	29	37	43	+6 / +16%
Number of rooms in accommodation facilities	3,584	4,145	5,060	+915 / +22%
Room occupancy rate	62%	58%	58%	-
Number of beds in accommodation facilities	6,758	7,835	9,474	+1639 / +21%
Bed occupancy rate	49%	49%	49%	-
The sale of accommodation services	628 m.	711 m.	933 m.	+222 / +31%

Sources: Statistical Office of Estonia, Tallinn City Tourist Office and Convention Bureau

Foreign tourists in accommodation facilities in Tallinn

The number of foreign tourists in accommodation facilities in Tallinn amounted to 957,000 (growth of 31% or 227,000 visitors). They stayed here for a total of 1.15 million nights (growth of 32% or 373,000 nights). The average length of stay in paid accommodation hasn't changed in recent years, being 1.6 nights. Residents of Canada, the US, Great Britain and Ireland stayed the longest (2.3 to 2.5 nights), while the residents of Finland, Latvia and Lithuania stayed the shortest (1.3 to 1.6 nights). While the bulk of tourists from Western and Northern Europe stay in paid accommodation, a large portion (40 - 60%) of tourists from Russia, Latvia and Lithuania stay with friends or relatives.

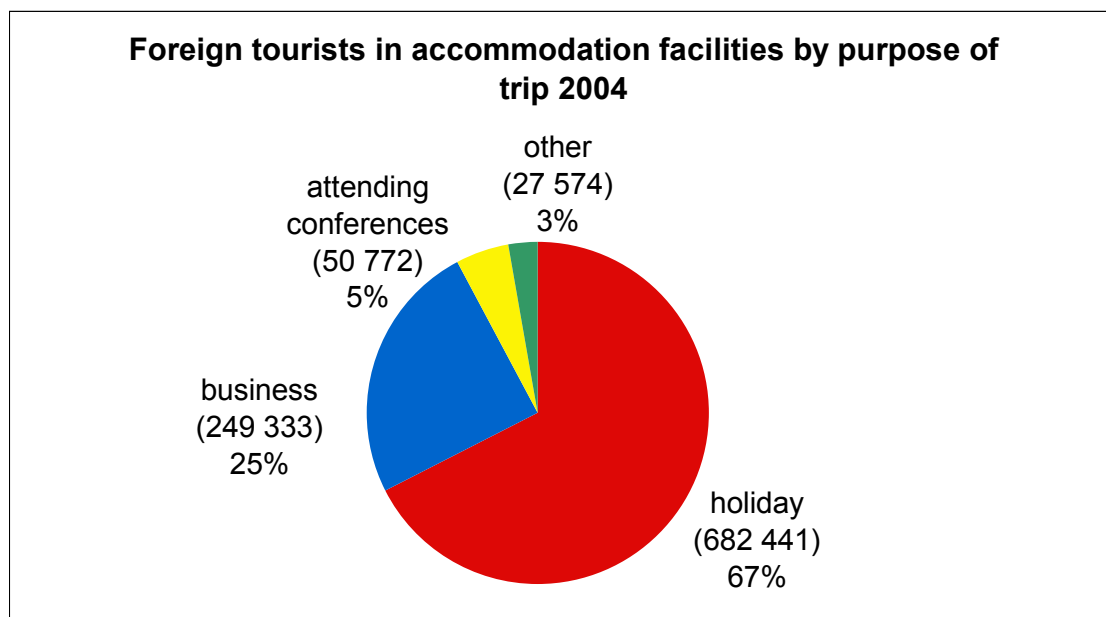
During the high season, i.e. in summer, the number of foreign tourists accommodated in Tallinn increases four to fivefold compared to the off-season. The biggest seasonal difference is among tourists who come to Tallinn for their annual vacation and those from more distant countries, such as Germany, France, Italy, the United States, etc. City-breakers are divided more equally across the year. Seasonal differences are not so pronounced among visitors from Latvia and Lithuania. Russian tourists tend to visit Tallinn at the end and beginning of the year. Most tourists arrive in Tallinn in July, and this trend is heavily influenced by the travel habits of Finnish tourists. Tourists from other countries prefer to visit Tallinn in August. January and February are the quietest months.



Source: Statistical Office of Estonia

The strong growth (+221,000) in the number of foreign visitors staying in accommodation facilities was mainly due to additional holidaymakers. The number of people on business trips remained the same, while within that total, the number of people participating in conferences grew significantly compared to recent years (2003/2004 saw an increase of 34%). The months of May and June,

as well as September and October, were the most popular for those attending conferences.



Source: Statistical Office of Estonia

Cruises

The number of cruise ship calls and cruise passengers arriving in Tallinn has continued to increase. The events of September 11, 2001 caused the number of cruise passengers to fall in 2002, but this sector quickly recovered and grew significantly in 2003. Last year the port of Tallinn received a total of 232 cruise ship calls, with 205,000 cruise passengers on board. The number of arrivals was down by three ships, but as the share of larger cruise vessels in the total number of calls has increased, the number of passengers grew by 1000. In terms of the number of cruise ship calls, Tallinn was the third most popular cruise destination in the Baltic Sea region in 2004 after St. Petersburg and Copenhagen.

	2000	2001	2002	2003	2004	Change 2000-2004, total	Change 2003/2004 %
Number of cruise ship calls	181	175	165	235	232	+51	+28
Number of cruise passengers	110,000	134,000	127,000	204,000	205,000	+95,000	+86

Source: Port of Tallinn

Travel behaviour among foreign visitors to Tallinn

In 2004 the number of foreign visitors increased rapidly mainly due to additional holidaymakers. While Finnish holidaymakers generally came to Tallinn for short city-break, staying for a day or two, one-third of all holidaymakers from elsewhere stayed in Tallinn for their annual vacation. Travellers from further away (30%) often combined a visit to Tallinn with travel around the Baltic States or to other northern cities.

While the percentage of first-time visitors from Finland was still very low (3%), the number of first-time visitors from elsewhere has grown in recent years, reaching 40% in 2004. Year by year the portion of people staying overnight on board a ship has decreased (31% of all people spending at least one night away from home), and the portion of people staying overnight in Tallinn has increased (65%). Seventy percent of the tourists visiting Tallinn prefer to stay at hotels, while the rest prefer to stay either at other accommodation facilities or with friends or relatives.

The growth in first-time holidaymakers has raised the number of sightseers (46% of all foreign visitors). At the same time, repeat travellers from Finland have also been more interested in sightseeing. Rapidly growing attractions in Tallinn include beauty salons and health centres. In comparison to 2002, they were visited twice as often (18% of foreign visitors) in 2004. The growing preference among Finnish tourists for staying in Tallinn rather than on board ships also brought about an increase in visits to pubs and restaurants.

As Tallinn's city centre is quite small and compact, most tourists (88%) get around on foot. Beyond that, the most popular means of transport is taxi (35%), followed by public transport (18%) and car (15%).

Foreign visitors' spending

In 2004, foreign visitors spent an average of 136 Euros per person per day in Tallinn, up by 34 Euros (33%) from 2003. Most money was spent on shopping and accommodation, followed in equal portions by entertainment and food and drink. Compared with recent years, the largest growth has been in the amount spent on shopping, particularly among Finns and Swedes.

The popularity of shopping has caused expenditures among day-visitors to rise to 152 Euros in 2004. Visitors who stay overnight spend somewhat less on average—visitors in paid accommodation facilities spend 124 Euros and visitors in non-paid accommodation spend 77 Euros per day. The biggest spenders per day were Swedes and Americans. Latvians and Lithuanians spent the least.

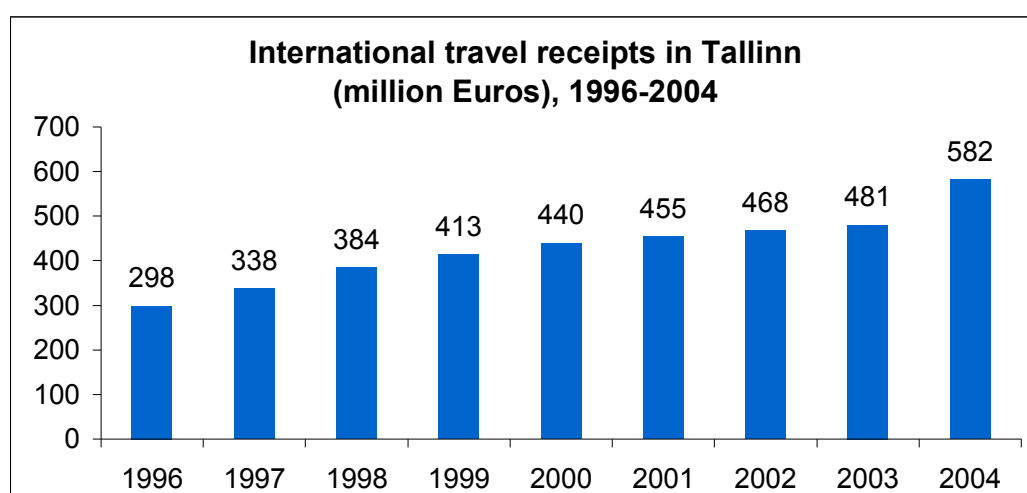
Among overnight visitors, the biggest spenders per trip were Swedes, followed by Russians, Brits and Norwegians. Finns, who stay in Tallinn for a shorter time, also spent half as much per trip.

However, all in all, the highest income for Tallinn was still generated by Finns, who spent a total of 275 million Euros. Swedes spent 115 million, followed by Russians with 31 million and Germans with 30 million Euros.

Tallinn's revenue from tourism

Tallinn's international travel receipts (i.e. all travel related expenditures by foreign visitors, including accommodation, food, entertainment, shopping, etc.) amount to an estimated 80% of total Estonian travel receipts. In 2004, Tallinn travel receipts were worth 581 million Euros, which is 102 million Euros or 21% more than in 2003.

Estonia's international fare receipts amounted to 179 million Euros in 2004. As all of the biggest Estonian companies offering international transport services are situated in Tallinn, Tallinn's international tourism receipts in 2004 were estimated at 761 million Euros.



Source: Bank of Estonia

Opinions of foreign visitors

In recent years, the aspects that foreign visitors to Tallinn have appreciated most are the abundance of good restaurants, the ease of getting around the city by foot and the adequacy of sights. In 2004, foreign tourists' appreciation of the ease of walking around in Tallinn and its safety had risen; Tallinn was also considered to be less crowded than before. Compared with previous times, visitors' opinions of the weather and the attractiveness of the nightlife were lower. The highest assessment of the various aspects of Tallinn's reputation was given by Finns, Americans and Russians, the lowest by Swedes.

On average visitors graded their trip to Tallinn with a score of 8 on a 10-point scale. Compared to previous years this evaluation has not changed. The average opinion of visitors from Finland and Sweden has improved, while that of visitors from Norway, England and Germany has decreased.

The number of tourists and nights spent in accommodation facilities in Tallinn 2003-2004

	tourists		change		nights spent		change	
	2003	2004	total	%	2003	2004	total	%
TOTAL	813,225	1,062,579	249,354	31	1,279,178	1,688,857	409,679	32
Estonia	82,487	105,153	22,666	27	126,253	162,671	36,418	29
Foreign countries total	730,738	957,426	226,688	31	1,152,925	1,526,186	373,261	32
Austria	2,109	4,048	1,939	92	4,457	7,738	3,281	74
Netherlands	5,309	7,228	1,919	36	11,987	15,944	3,957	33
Belgium	2,286	3,145	859	38	5,458	6,724	1,266	23
Spain	7,165	10,638	3,473	48	11,943	18,323	6,380	53
Ireland	1,560	2,491	931	60	4,031	5,860	1,829	45
Italy	10,780	22,013	11,233	104	24,016	46,374	22,358	93
Greece	1,035	1,369	334	32	2,426	2,680	254	10
Luxemburg	263	305	42	16	631	678	47	7
Portugal	980	2,450	1,470	150	2,126	4,358	2,232	105
France	6,195	11,466	5,271	85	11,877	22,720	10,843	91
Sweden	41,919	58,868	16,949	40	69,657	95,068	25,411	36
Germany	42,377	56,429	14,052	33	78,646	111,459	32,813	42
Finland	456,418	571,308	114,890	25	606,000	762,875	156,875	26
Great Britain	24,617	33,903	9,286	38	62,582	85,461	22,879	37
Denmark	7,874	9,370	1,496	19	15,622	19,045	3,423	22
Iceland	445	735	290	65	1,155	1,578	423	37
Norway	23,562	29,144	5,582	24	49,231	64,043	14,812	30
Switzerland	2,513	3,197	684	27	4,975	6,428	1,453	29
Albania, Bulgaria, Romania	693	880	187	27	2,216	2,245	29	1
Lithuania	9,021	14,032	5,011	56	14,474	21,735	7,261	50
Latvia	16,876	22,864	5,988	35	25,086	34,490	9,404	37
Poland	6,717	8,505	1,788	27	12,298	14,384	2,086	17
Slovakia	384	400	16	4	803	785	-18	-2
Slovenia	334	505	171	51	804	893	89	11
CIS	29,273	35,627	6,354	22	63,654	76,423	12,769	20
Incl. Russia	25,566	32,352	6,786	27	54,793	68,779	13,986	26
The Czech Republic	1,463	3,118	1,655	113	2,898	5,017	2,119	73
Turkey	118	441	323	274	403	1,016	613	152
Hungary	1,093	1,788	695	64	2,987	3,804	817	27
Other European countries	2,988	7,680	4,692	157	6,947	15,101	8,154	117
African countries	468	525	57	12	907	1,111	204	22
Asian countries	7,629	9,611	1,982	26	14,771	18,291	3,520	24
Incl. Japan	6,322	6,879	557	9	11,674	13,370	1,696	15
The United States of America	10,165	15,812	5,647	56	24,863	36,429	11,566	47
Canada	1,040	1,878	838	81	3,078	5,160	2,082	68
South- and Central-America	430	995	565	131	835	2,053	1,218	146
Australia, Oceania	1,578	2,327	749	47	3,125	5,001	1,876	60
Incl. Australia	1,293	1,851	558	43	2,490	4,041	1,551	62
Incl. New-Zealand	176	262	86	49	340	529	189	56
Other countries	3,061	2,331	-730	-24	5,946	4,892	-1,054	-18

Source: Statistical Office of Estonia