

Tallinn visitor survey  
2014  
Target market: Cruise passengers



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# 1

## Introduction

### Background of cruise passengers



# Survey background

- The main objective of the survey is to collect detailed data on **foreign visitors to Tallinn, the purpose of their trip, evaluations and spending during the trip. The survey reveals:**
  - from which countries, for how long and how foreign visitors have arrived in Tallinn;
  - what is the purpose of their visit to Tallinn and what motivated them to choose Tallinn as the destination;
  - which services aimed at foreign visitors are used and how they evaluate the quality of the services;
  - how much money they spend, what they spend their money on and how they evaluate the value for money received for the products/services.
- Survey results enable us to evaluate the competitiveness of Tallinn as a tourism destination in Europe and make plans for future development, with the objective to increase income from tourism and make Tallinn even more attractive and tourist friendly.
- The survey of foreign visitors to Tallinn has been commissioned by the Tallinn City Enterprise Board and carried out using the same methodology since 2002. The results of 2014 in this report have been compared to results of 2011 and 2008.
- Terms used in the current report:
  - A cruise passenger is a foreign visitor to Tallinn who arrives in Estonia on a cruise ship, visits Tallinn and does not stay overnight.
- Sample size:
  - 2014 – 158 cruise passengers;
  - 2011 – 169 cruise passengers;
  - 2008 – 154 cruise passengers;
- Cruise passengers were interviewed at the cruise ships terminal.

# Summary

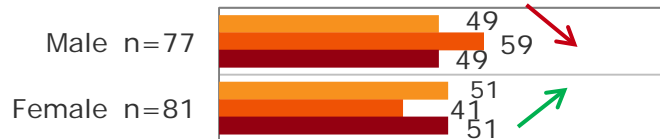
## Background of cruise passengers

- In 2014, approximately 470 000 cruise passengers arrived in Tallinn (in 2011 - 431 000 and in 2008 - 375 000).
  - Similarly to 2008, the number of men and women among cruise passengers was more or less equal.
  - **Cruise passengers are mostly older**, half of the passengers are over 55.
    - Compared to 2011, there have been the following changes in the age groups:
      - the share of 35-44-year-olds has decreased significantly (17%→8%);
      - the share of those 65 and older has increased significantly (24%→31%).
    - More important changes during the last three surveyed years:
      - since 2008 the share of 18-24-year-old cruise passengers has increased somewhat year after year (6%→11%);
      - the share of 45–54-year-olds has dropped significantly (25%→15%).
  - **Almost seven out of ten cruise passengers travel with a spouse or partner.**
    - Compared to 2011, the share of passengers travelling with their spouse/partner has increased by a significant 10% in 2014 (59%→69%). The situation was similar in 2008, when 68% travelled with a partner/spouse.
  - While in 2008 one fifth of all cruise passengers travelled with other adults, in **2014 the total of one quarter of cruise passengers are travelling with other adults.**
  - **38% of cruise passengers are pensioners**, their share has increased significantly compared to 2011 (28%→38%). On the other hand, **the share of top managers and leading specialists has decreased by a half** (16%→8%).
    - The following changes have taken place during the last three survey years:
      - the share of entrepreneurs has increased slightly ( 6%→11%);
      - the proportion of skilled workers has decreased somewhat (14%→8%).
  - 90% of the survey participants were passengers and 10% were crew members on the cruise ship.
-

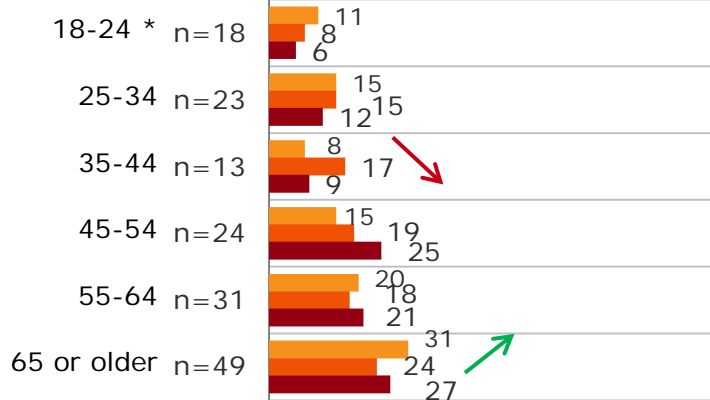
# Sociodemographic profile of cruise passengers (1)

% of all visitors belonging to the target group

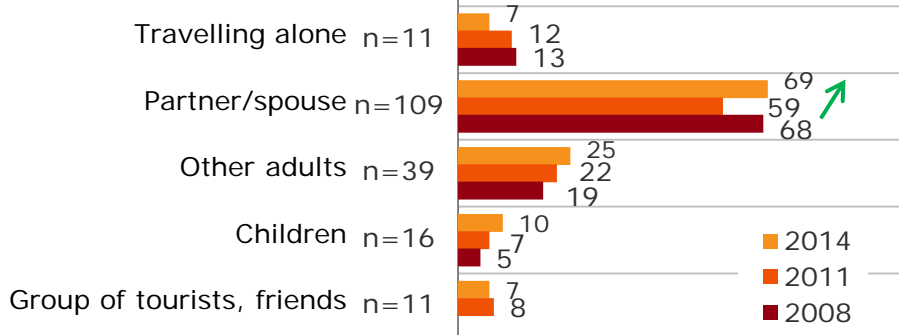
## GENDER



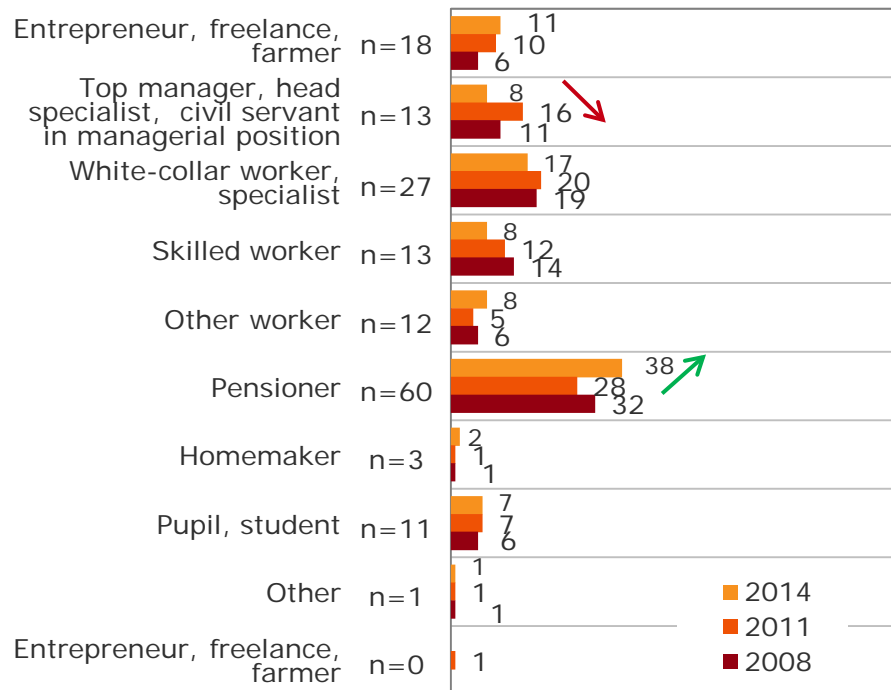
## AGE



## TRAVEL COMPANION



## STATUS

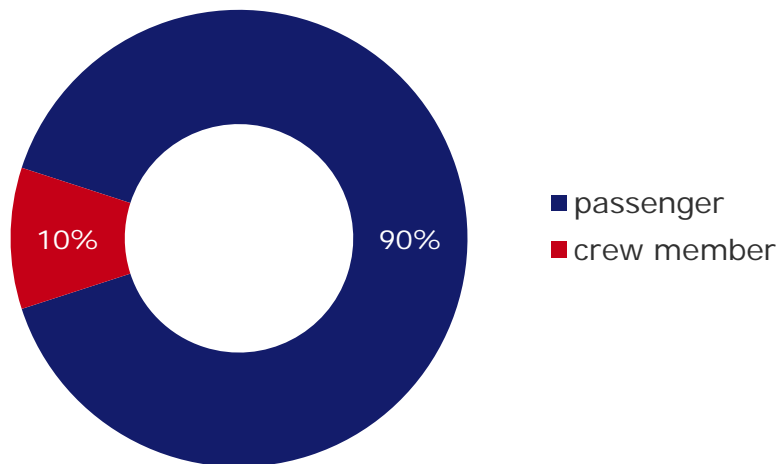


\*in 2011 the youngest age group was 15-24, in 2014 it was 18-24

# Sociodemographic profile of cruise passengers (2)

% of all visitors belonging to the target group

Are you a passenger or crew member?



# 2

## Awareness of Tallinn and planning the trip





# Summary

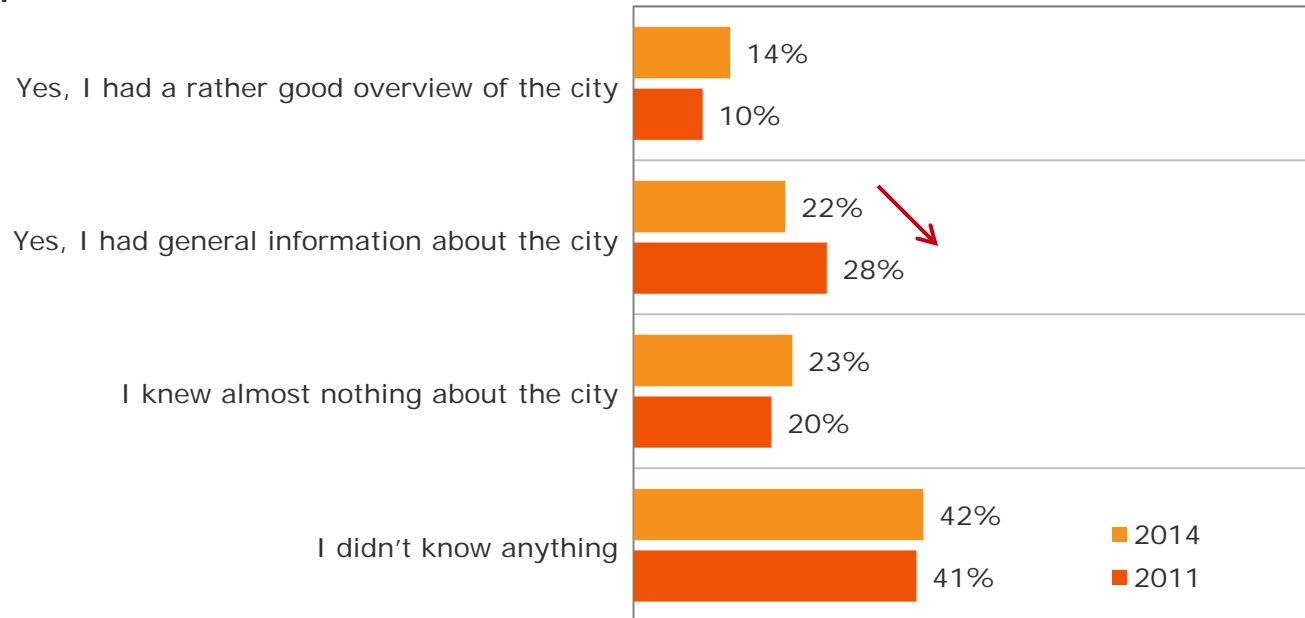
## 88% of cruise passengers have not visited Tallinn before

- Since going on a cruise allows passengers to visit several countries and cities during one trip and also visit destinations they've never been to before then it is to be expected that **65% cruise passengers who visited Tallinn knew nothing or almost nothing about Tallinn before the trip**. Compared to 2011, there has been a small decrease in the share of those passengers who had general knowledge about Tallinn before the trip (28%→22%). Only 14% said that they have quite a good overview of Tallinn.
- **The majority of cruise passengers (88%) have not visited Tallinn before** and there has also been a slight decrease in the number of those passengers who have been to Tallinn at least once or twice.
- **More than half (60%) of survey participants booked their trip through a travel agency or tour operator**, 15% found the cruise online and 17% purchased the cruise through the cruise company, the relative importance of the latter has doubled compared to 2011.
- **Since 2008 there has been a significant increase (49%→63%) in the share of those passengers for whom this is the main holiday in 2014**. Compared to 2011, there has been a certain decrease among those visitors for whom the cruise is the second most important holiday of the year (32%→25%). At the same time, compared to 2011 there has been a certain increase in relative importance of the cruise as a short break (7%→12%) but it does not reach the level of 2008 (28%).

# Knowledge about Tallinn before the trip

% of all visitors belonging to the target group

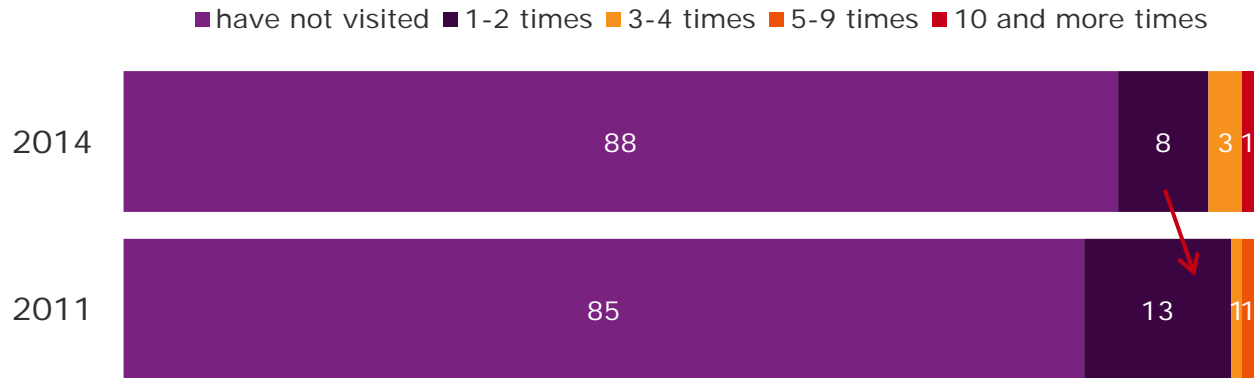
## Did you know anything about Tallinn before this cruise?



# Previous visits to Tallinn

% of all visitors belonging to the target group who are not crew members

## How many times have you visited Tallinn before this trip?

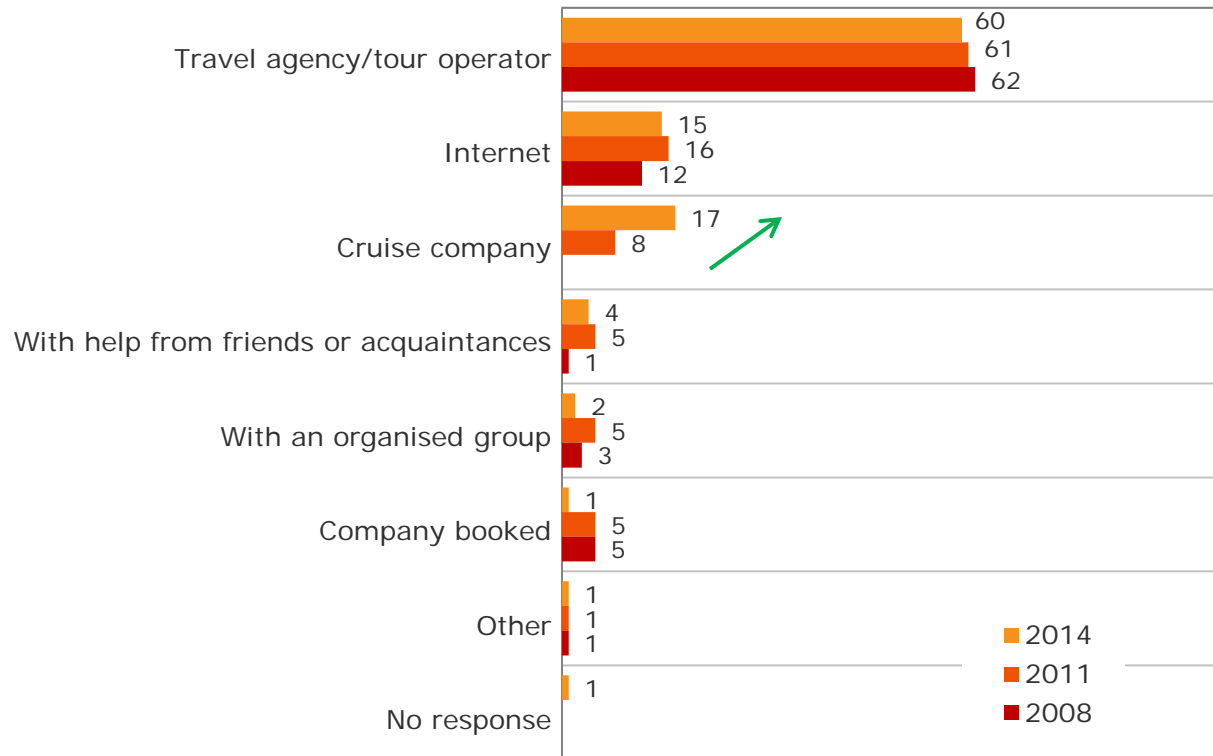


*\*in 2008 it was not asked if the respondent was a crew member or passenger, therefore no data from 2008 has been included on this graph*

# Booking the trip to Tallinn

% of all visitors belonging to the target group who are not crew members

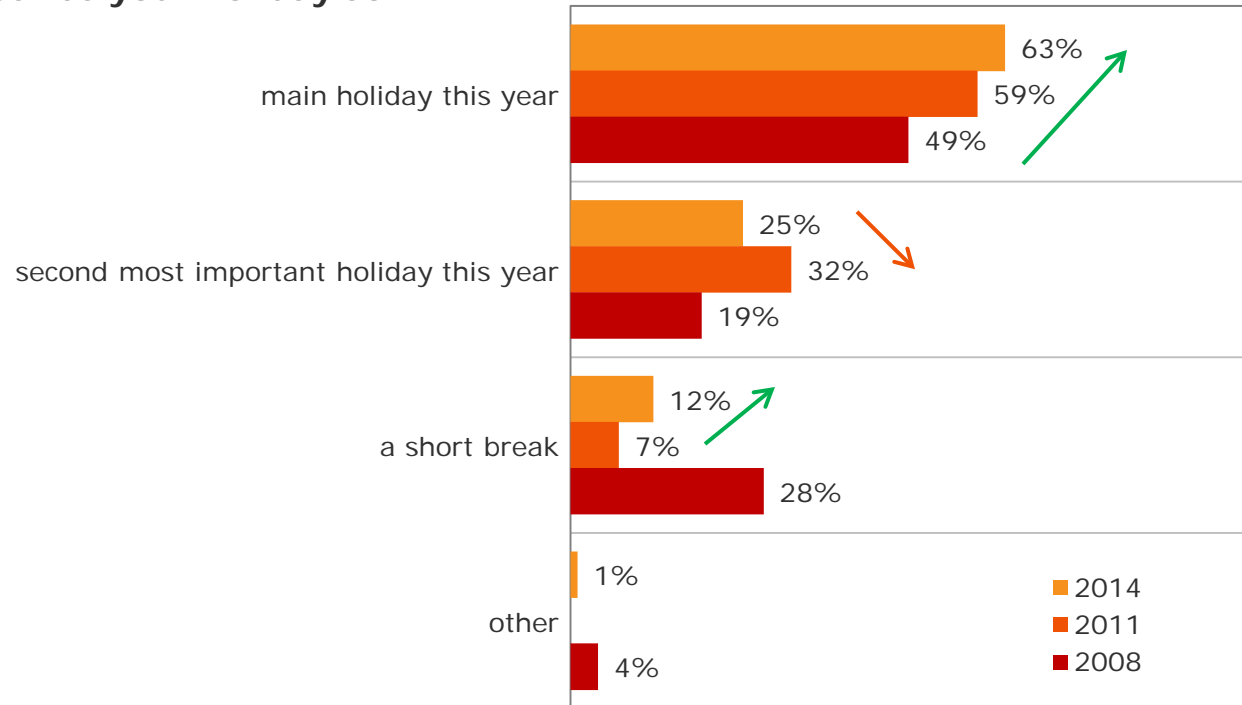
## How did you book your TRIP to Tallinn? (1 possible answer)



# Meaning of the holiday

% of all visitors belonging to the target group who are not crew members

## Would you describe your holiday as ...



# 3

Sources of information  
Sharing experiences about the visit on  
social media



# Summary

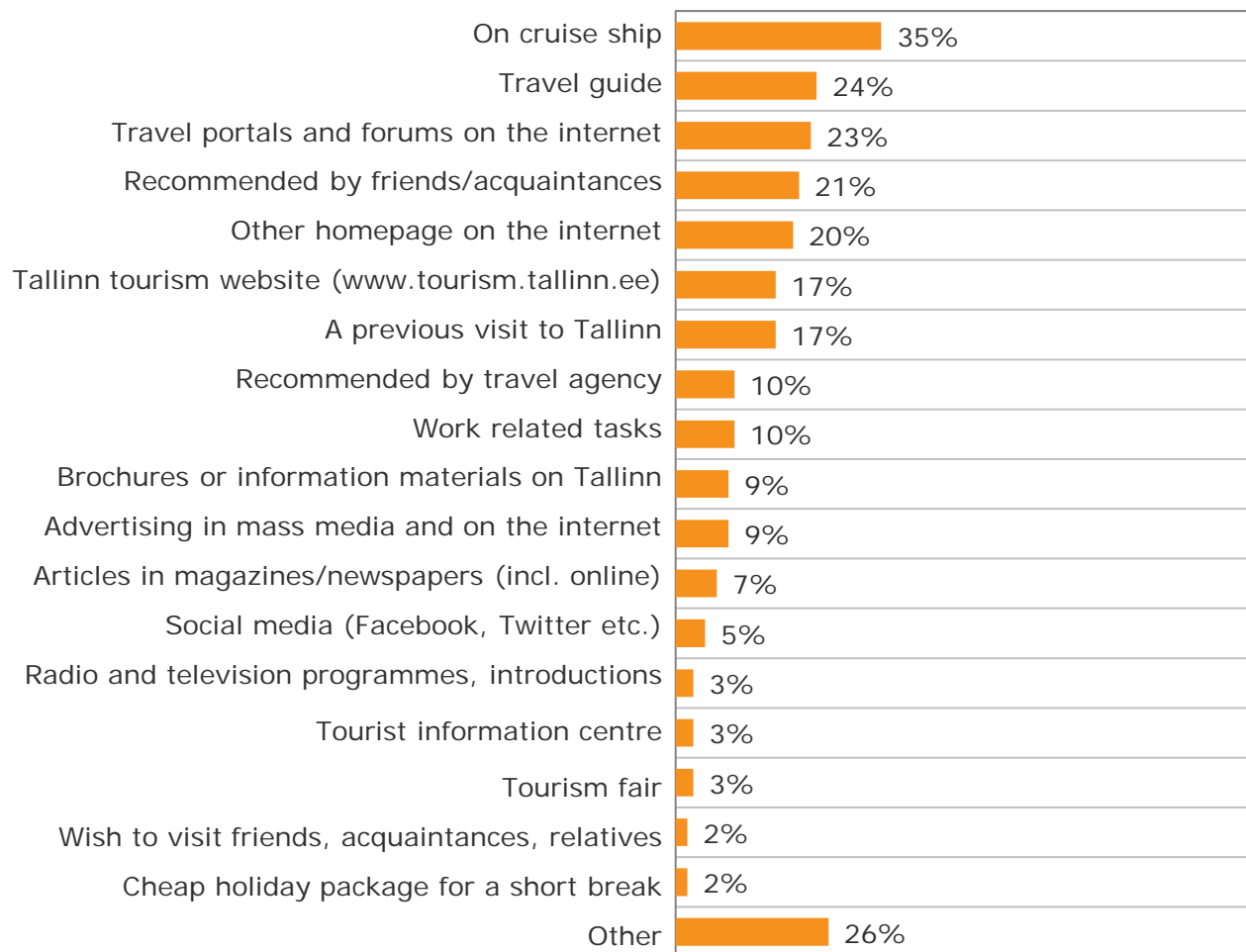
## Main information about Tallinn prior to the visit and during the visit is obtained on the cruise ship or at the harbour

- The main source of information before the cruise and during the cruise was **information provided on the cruise ship**, which was received by one third of cruise passengers (35%) before the start of the trip. Significantly more than half (61%) of the visitors obtained information during the trip on the cruise ship or at the harbour.
- **Travel guides** about the country or the city (e.g. Lonely Planet etc.) are considered to be important sources of information before the trip as well as during the trip.
- In addition to that, they look for information before the trip **on the internet**, including travel portals and forums, and listen to friends'-acquaintances' recommendations. During the trip the **brochures and information materials introducing Tallinn** are somewhat important as sources of information.
- Slightly more than eight out of ten cruise ship passengers (84%) use social media (Facebook, Twitter, blogs etc.). One third of the cruise passengers using social media shared experiences about their trip on social media channels during their visit to Tallinn and almost half of them were planning to do that after the trip.

# Sources of information about Tallinn before the trip

% of all visitors belonging to the target group who knew something about Tallinn before their trip

**From which of the following sources did you obtain information about Tallinn before the trip?**

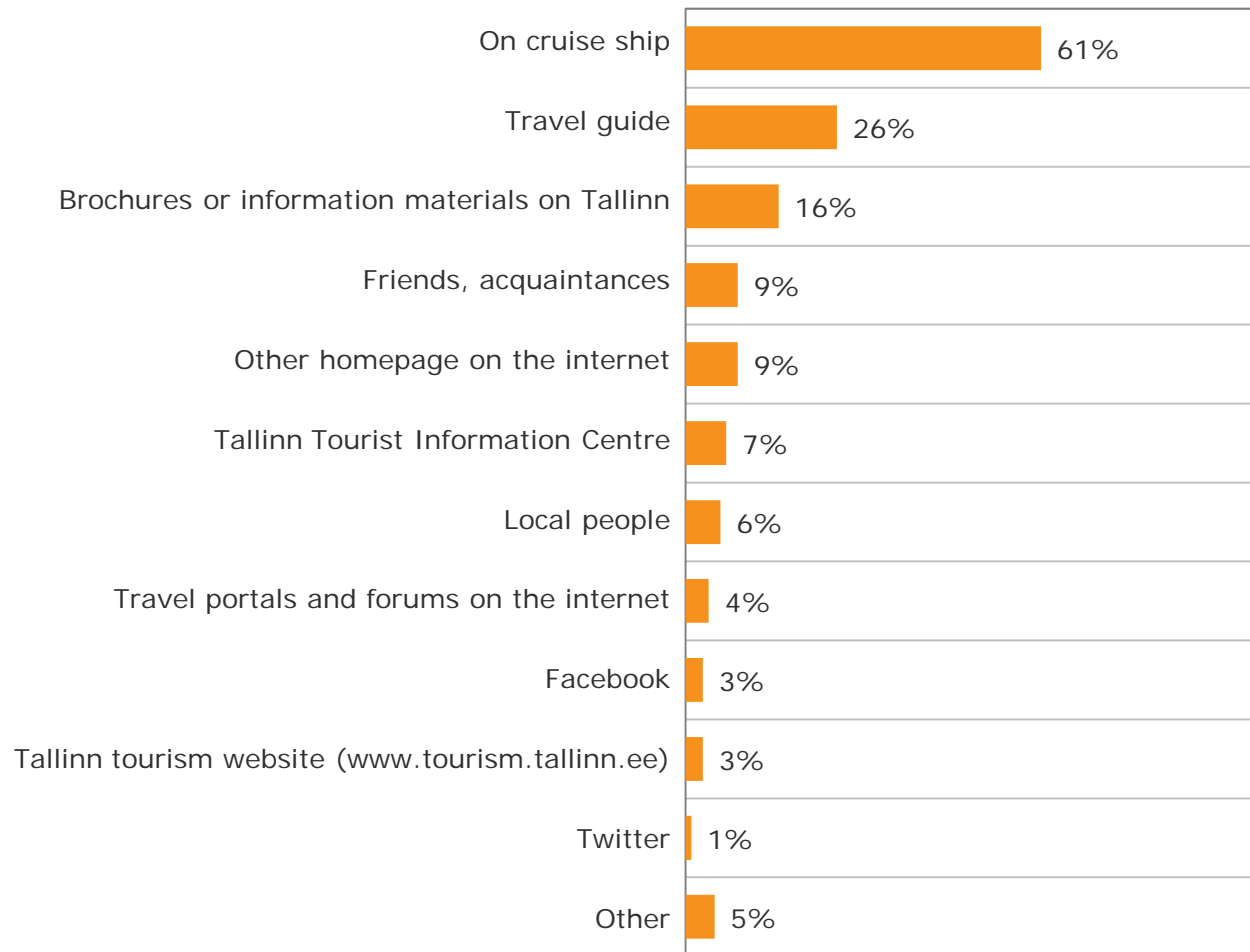




# Sources of information about Tallinn during the trip

% of all visitors belonging to the target group

**From which of the following sources did you obtain information about Tallinn during the trip?**



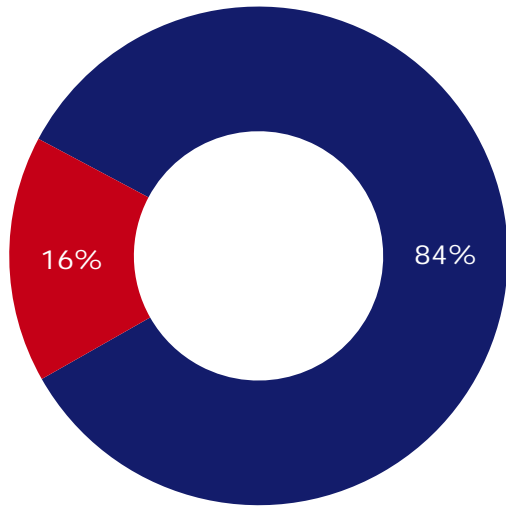
# Sharing travel experiences on social media channels

## Facebook, Twitter, blogs

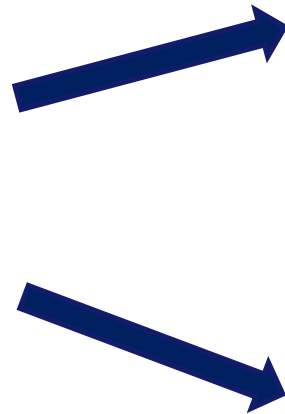
% of all visitors belonging to the target group  
% of those using social media

### Use of social media (Facebook, Twitter, blogs)

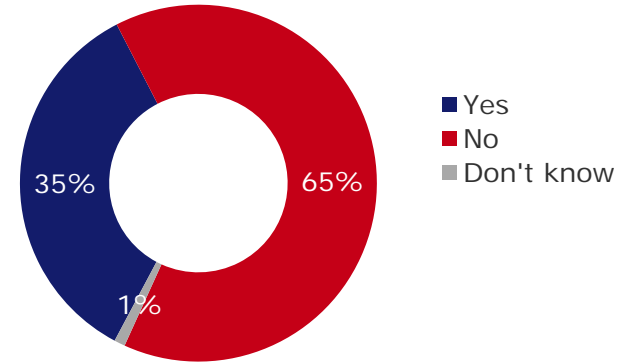
n=158



■ Uses social media  
■ Does not use social media

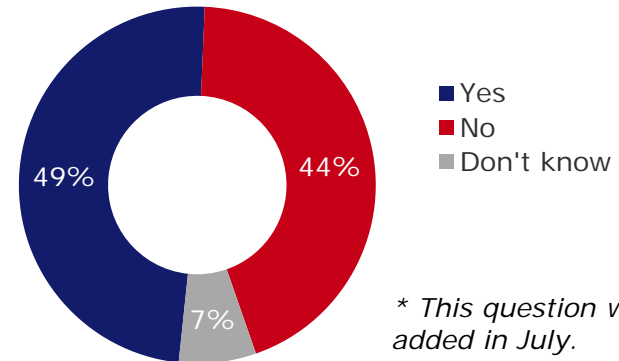


### When in Tallinn, did you share experiences about your trip on social media (Facebook, Twitter, blog)? n=133



■ Yes  
■ No  
■ Don't know

### Do you plan to share experiences about your trip to Tallinn on social media AFTER your visit (Facebook, Twitter, blog)?\* n=45



■ Yes  
■ No  
■ Don't know

\* This question was added in July.

# 4

## Visit to Tallinn and impression of it



# Summary

Visitors mostly see the Old Town that is a short walk away and visit sights downtown, go shopping and to cafes and restaurants

- **On average, cruise passengers spend 4,2 hours in Tallinn.** This gives them time to mainly visit the Old Town and downtown. As a result of this, the most memorable places named were Old Town, Nevski cathedral, Town Hall square and Toompea. A considerably smaller number of cruise passengers have time to visit Kadriorg and Pirita, the relative importance of those locations has continued to increase since 2008.
- Since the time spent in Tallinn is rather short, the main activities are **sightseeing, walking around the city, shopping and going to cafes/restaurants.**
- **Cruise passengers usually get around in Tallinn on foot (91%),** a small share of visitors take the sightseeing bus (18%) or private bus (16%) reserved especially for the trip.
- **Three quarters of cruise passengers spent money during their visit to Tallinn.** Average total spending per person during one day was 71 euro. The majority of cruise passengers spent money on souvenirs and gifts as well as food and drink. Spending by cruise passengers has increased considerably since 2011 but Estonia adopting the EURO probably had an impact here, bringing along a certain increase in prices of goods and services sold in Estonia.
- Evaluations of the visit to Tallinn have been improving over the last three survey periods (2008, 2011, 2014) and **nine out of ten people give a score of at least 8 to their visit** (on 10-point scale).
- Similarly to 2011, cruise passengers value highly the number of sights and active night-life. They are most dissatisfied with the price level of products and services.
- According to more than half of cruise passengers (54%), the trip to Tallinn met their expectations, **45% admitted that the visit to Tallinn exceeded or greatly exceeded their expectations.**

# Summary

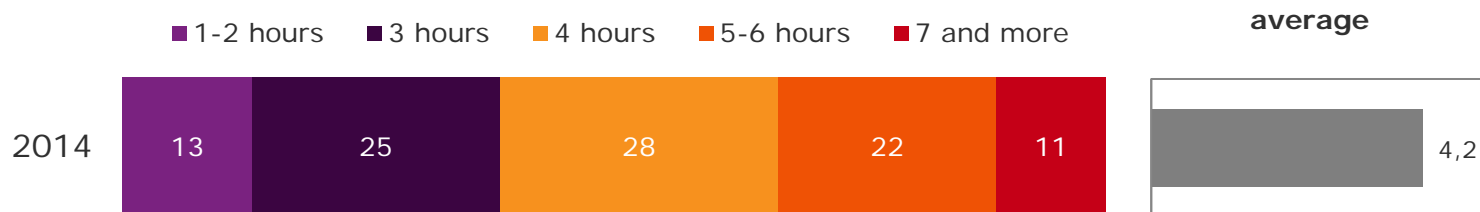
## Nearly half of the cruise passengers would visit Tallinn again

- **Nearly half (47%) of the cruise passengers would visit Tallinn a second time.** Compared to 2011, there has been an increase in the share of those foreign visitors who can't say anything about their possible return visit. Here the reason might be that compared to 2011, there were more travellers included in the 2014 survey who were from geographically more distant countries (for example in 2011 the survey included two Americans, in 2014 - 11). For those passengers a trip to Europe (Tallinn) is more costly and time consuming and therefore we can presume that destinations are considered somewhat more carefully than in case of passengers who are from geographically closer countries.
- **Almost all cruise passengers would very likely or quite likely recommend a trip to Tallinn to their friends or acquaintances.**
- **Most of the foreign visitors who arrived here on a cruise have not heard anything about the Tallinn Card** and only two cruise passengers participating in the survey had actually used the Tallinn Card. In case of this question the small number of respondent should be considered, which does not allow drawing statistically reliable conclusions.

# Number of hours cruise passengers spent in Tallinn

% of all visitors belonging to the target group

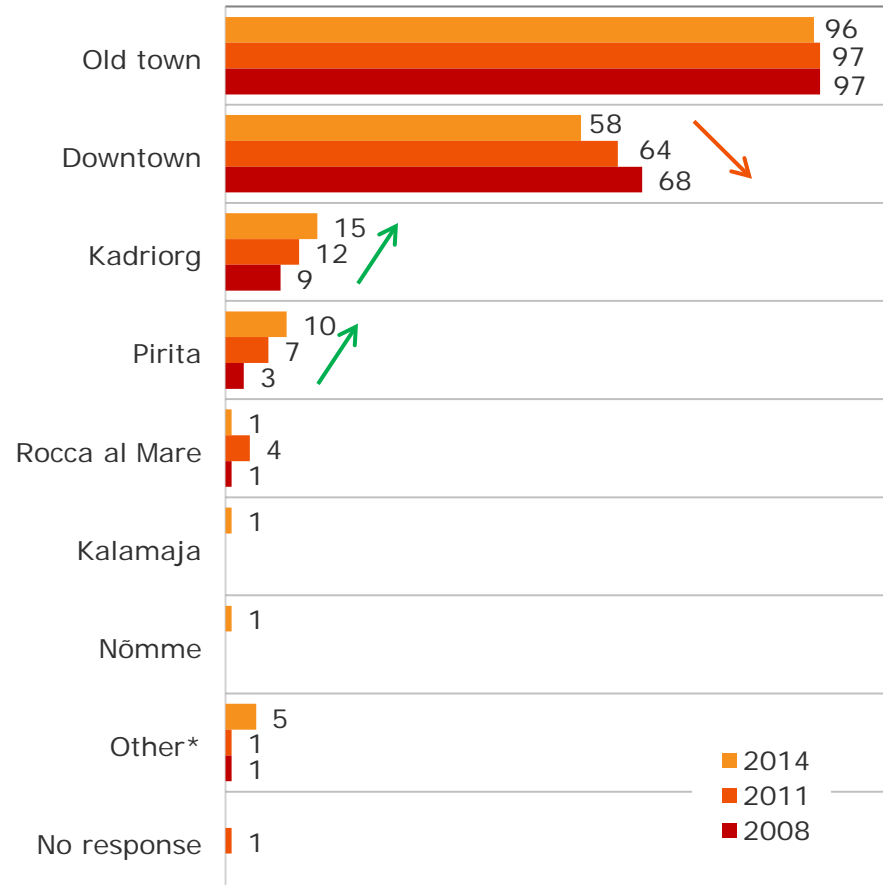
How many hours are you spending in Tallinn today?



# Areas visited in Tallinn

% of all visitors belonging to the target group

## Which areas of Tallinn did you visit during your trip?



\* „Other“ included the following:

- Tour in town
- Bus tour
- Centre at the harbour
- Harbour surroundings

# Most memorable place in Tallinn

Next is the summary of respondents' answers to the open-ended question ...

Please name the most memorable place you visited today.

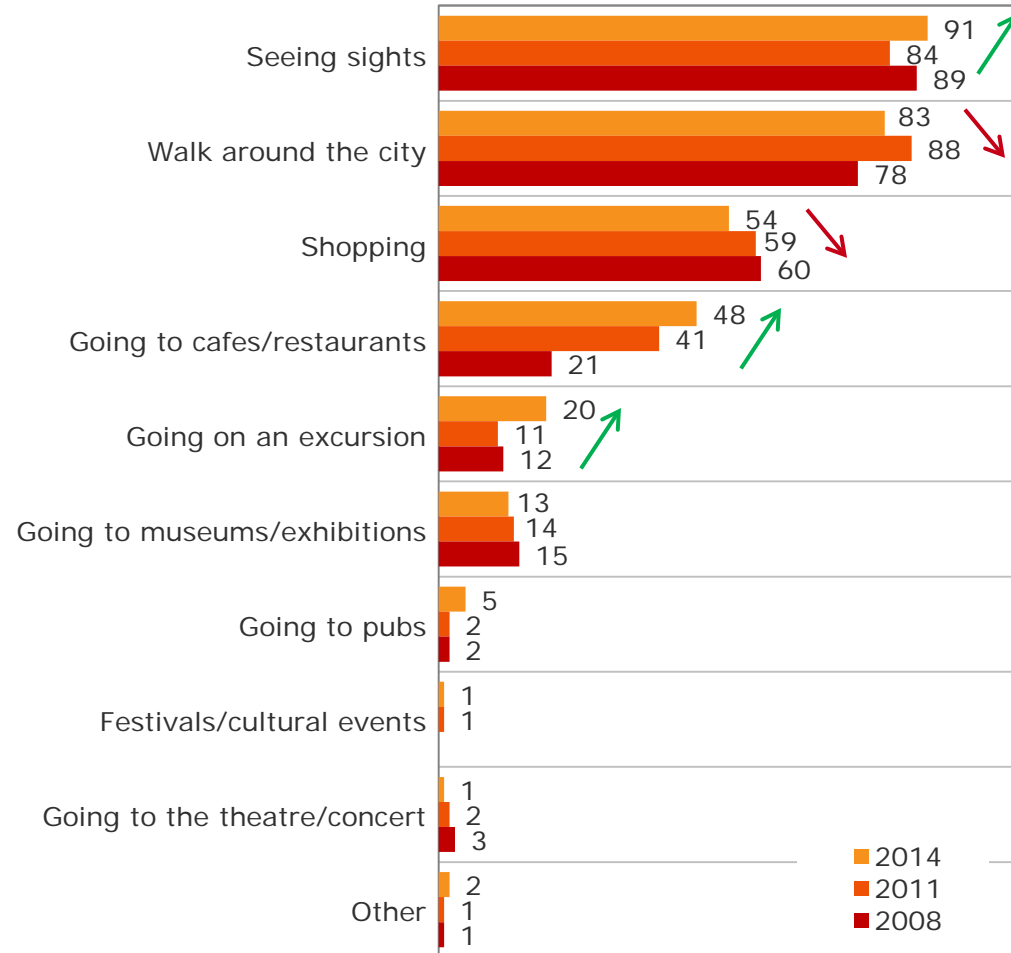
<b><u>Mentioned most often:</u></b>	<b><u>Also mentioned:</u></b>
<i>Old town (mentioned 44 times)</i>	<i>Olympic village in Pirita, TV tower (mentioned 1 time)</i>
<i>Nevski cathedral (mentioned 26 times)</i>	<i>Harbour area (mentioned 1 time)</i>
<i>Town hall square (mentioned 19 times)</i>	<i>St. Nicholas' church (mentioned 1 time)</i>
<i>Toompea (mentioned 13 times)</i>	<i>Town Hall pharmacy (mentioned 1 time)</i>
<b><u>Also mentioned:</u></b>	<i>Old Thomas (mentioned 1 time)</i>
<i>Town wall (mentioned 7 times)</i>	<i>Song festival grounds (mentioned 1 time)</i>
<i>Katariina Lane (mentioned 1 time)</i>	<i>Town wall, old town, Church of the Holy Ghost (mentioned 1 time)</i>
<i>Kiek in de Kök, bastions (mentioned 1 time)</i>	<i>St. Nicholas' church (mentioned 2 times)</i>
<i>History museum (mentioned 1 time)</i>	<i>Nunne passage (mentioned 1 time)</i>
<i>Everything was nice, we'll be back (mentioned 1 time)</i>	<i>Olde Hansa restaurant, house of Peter the Great (mentioned 1 time)</i>
<i>St. Olaf's church (mentioned 4 times)</i>	<i>Going up in the balloon (mentioned 1 time)</i>
<i>Fat Margaret, Town Hall square and other surrounding medieval buildings (mentioned 1 time)</i>	<i>Occupation museum (mentioned 1 time)</i>



# Activities in Tallinn

% of all visitors belonging to the target group

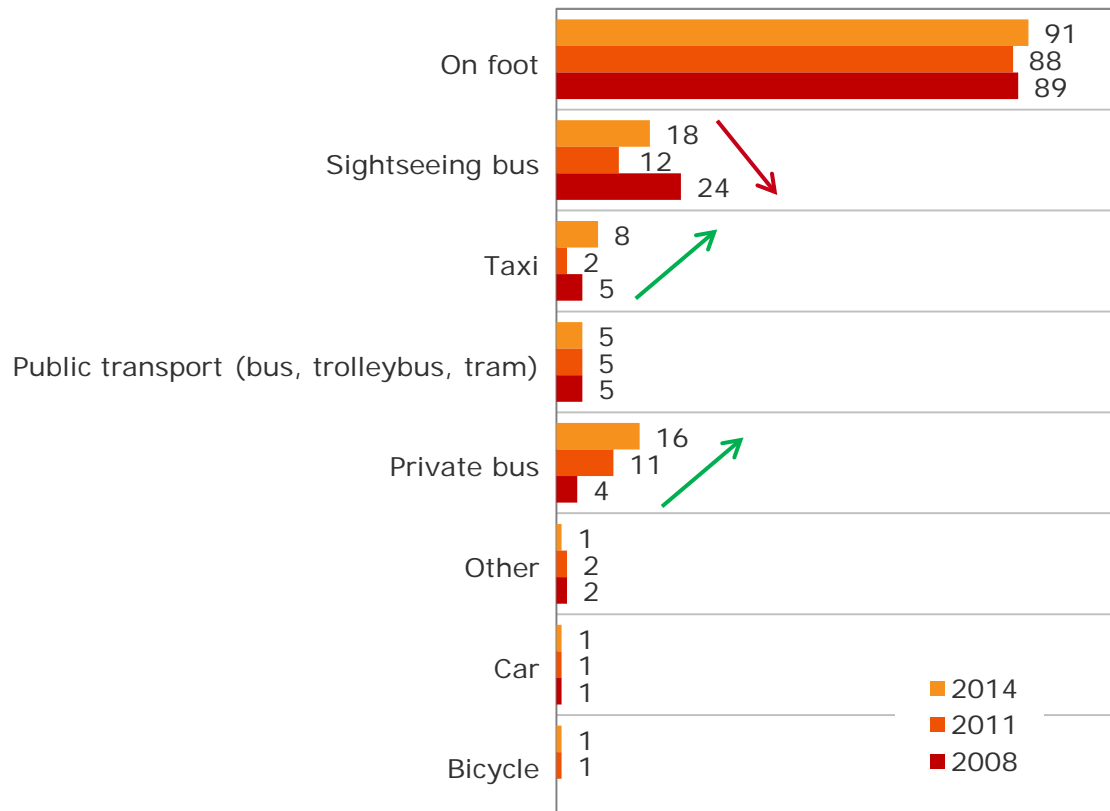
## Which of the following activities did you do in Tallinn?



# Transport used in Tallinn

% of all visitors belonging to the target group

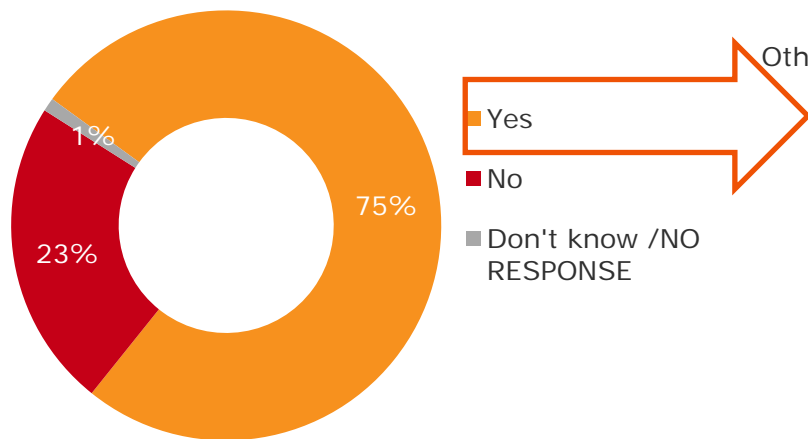
Which forms of transportation have you used during your visit to get around in Tallinn?



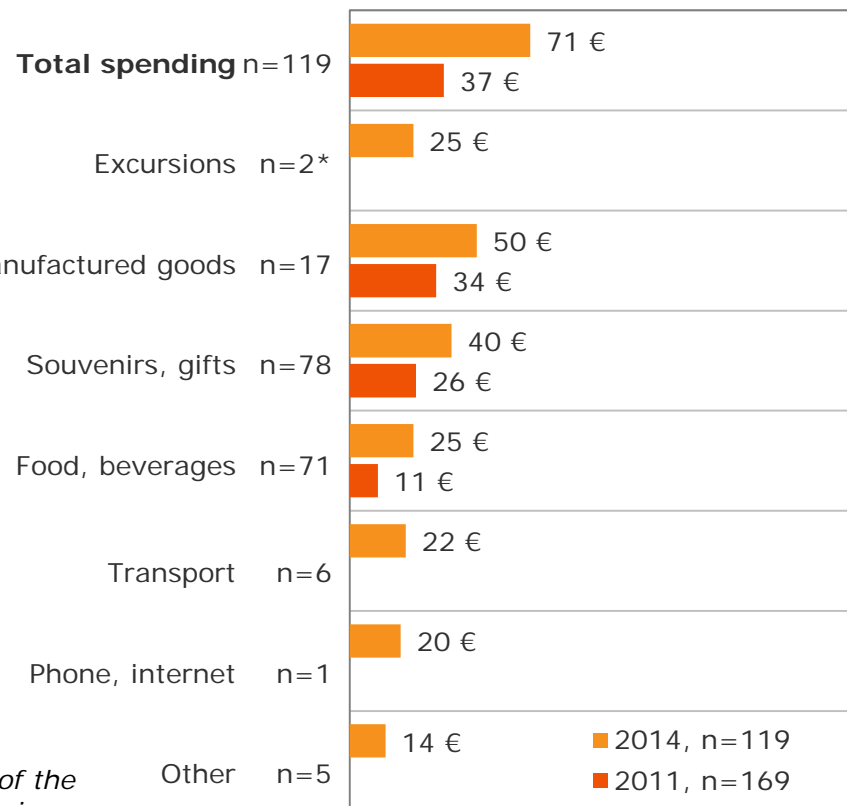
# Average spending per person per day

Average spending per person per day in EURO

## Did you spend any money in Tallinn?



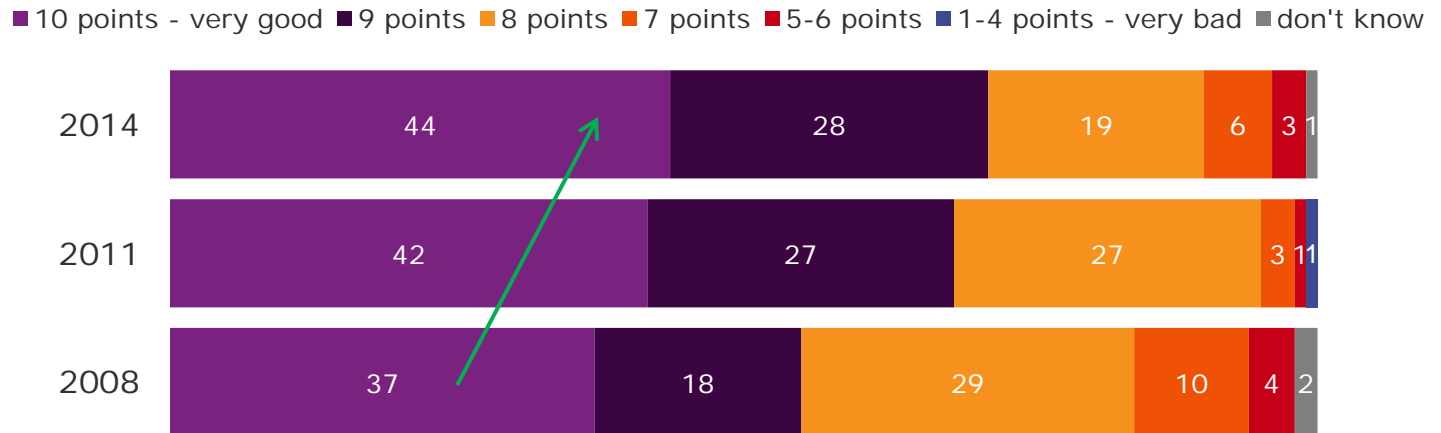
\* Three people spent money on excursions but since one of the cruise passengers claimed to have spent 300 € on the excursion then in the interest of more reliable average results, we excluded this person's expenses as an extreme case.



# Overall impression of the trip to Tallinn

% of all visitors belonging to the target group

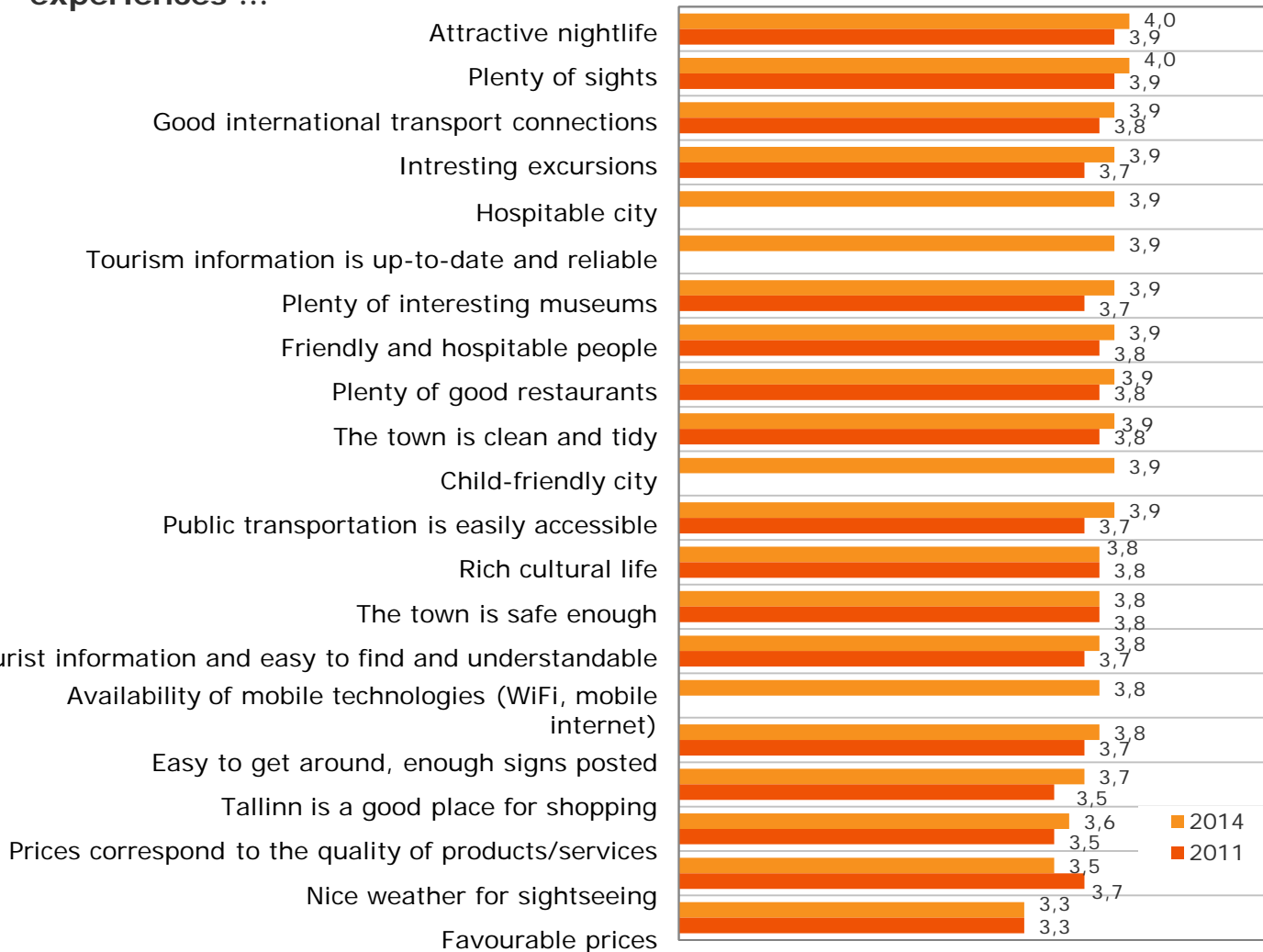
How would you evaluate the overall impression of your trip to Tallinn on the scale of 10, where 1 is the lowest and 10 the highest score?



# Image of Tallinn

average evaluations on a 4-point scale where 1 is the lowest and 4 the highest value

**To what extent would you agree with the following statements based on your own experiences ...**



*\*in 2011 the statement was: „Tallinn tourist information sufficiently available“*

# Tallinn was described using the following words

Next a summary of additional comments to the question ...

## What words would you use to describe Tallinn? (original quotes)

*Beautiful city, especially the Old Town.*

*Charming, quaint, picturesque, great photo opportunities.*

*Charming.*

*Historical, clean, beautiful, friendly.*

*Interessant, historisch, sehenwort.*

*Interesting town & will speak to friends.*

*Very clean and pleasant.*

*Wonderful, impressive, romantic.*

*Прекрасный город.*

*Scenic, hospitable, quaint.*

*Schöne Altstadt.*

*Niedlich, interessant.*

# Positive and negative aspects of Tallinn

A summary of respondents' additional comments to the following questions ...

<p>Are there any comments you'd like to add about something that you are <u>extremely satisfied</u> with or what was the <u>most positive</u> experience you had in Tallinn?</p>	<p>Are there any comments you'd like to add about something that you were <u>not satisfied</u> with or what <u>could be better</u> in Tallinn?</p>
<p>Harbour is close.</p>	<p>Time was short.</p>
<p>Nevski cathedral.</p>	<p>It was difficult to get around in the old town for handicapped people.</p>
<p>Tour of the city.</p>	<p>Difficult to walk on cobble stones.</p>
<p>Good beer.</p>	<p>Cold summer.</p>
<p>Information centre is very good.</p>	<p>Too many tourists and not clean enough.</p>
<p>Harbour view.</p>	<p>Long way to town, ship was far (0,5 km).</p>
<p>St. Nicholas' church and concert</p>	<p>Streets in poor condition.</p>
<p>Beautiful crafts.</p>	<p>Very expensive, it is cheaper in Italy.</p>
<p>Would like to come again.</p>	<p>Customer service could have been better at restaurants.</p>
<p>Architecture, well restored city</p>	<p>Some buildings are in need of repair.</p>
<p>People in Tallinn are very friendly.</p>	<p>Streets uncomfortable due to high curb stones.</p>
<p>Walking through the city and seeing the old buildings Beautiful women.</p>	<p>More signs (directions).</p>
<p>The historical sights have been preserved, very positive aura.</p>	<p>Too many souvenir stores with the same products, not enough originality.</p>
<p>Cultural events in old town.</p>	<p>There should be restrooms in town, there was one behind the church but it was filthy.</p>
<p>More friendly than expected and a wonderful experience.</p>	<p>It's not as clean everywhere as it was at the harbour.</p>

# Customer service in Tallinn

average evaluations on a 4-point scale where 1 is the lowest and 4 the highest value

**To what extent do you agree with each of the following statements and phrases about the customer service quality in Tallinn?**

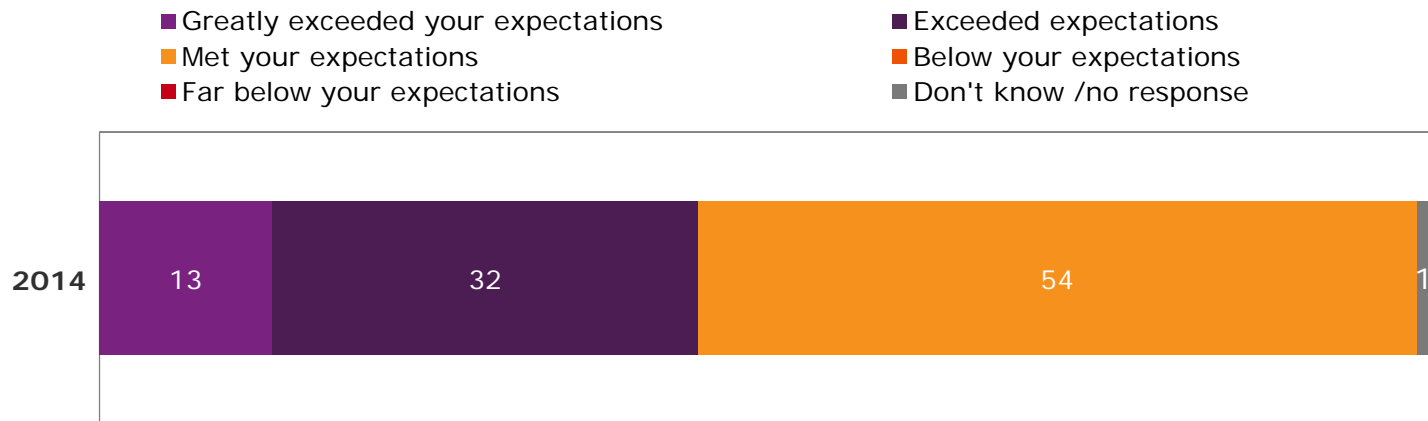




# Trip to Tallinn meeting expectations

% of all visitors belonging to the target group

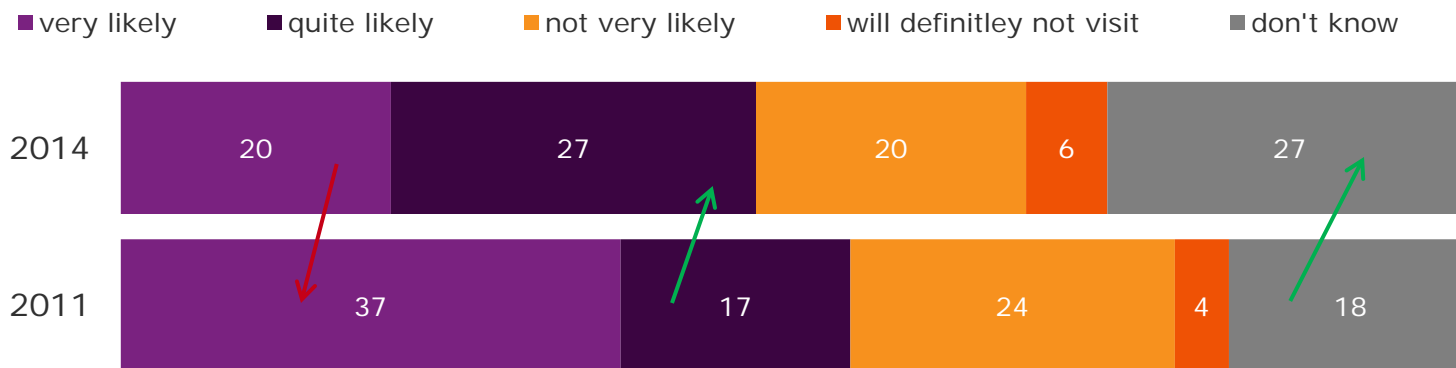
**Considering your initial expectations and experiences during the trip, did the trip meet your expectations?**



# Likelihood of visiting Tallinn again

% of all visitors belonging to the target group

## How likely are you to visit Tallinn again during the next 5 years?

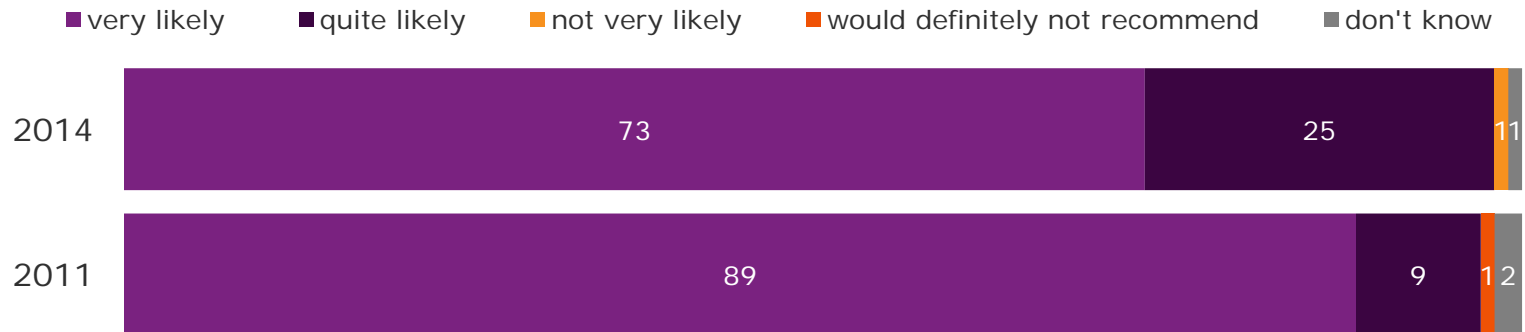


*In 2014 there were significantly more people among those responding "don't know" who were visiting Tallinn from outside of Europe (11 people from USA). We can presume that in case of longer distances (i.e. more expensive trips), the destination is considered more carefully and they are less likely to return to the same far-away destination.*

# Recommendation communication

% of all visitors belonging to the target group

**If your friends/relatives asked your advice about a holiday destination, how likely would you recommend Tallinn?**



*NB! Compared to 2011, the possible answers were changed somewhat. During previous years the possible answers were the following:*

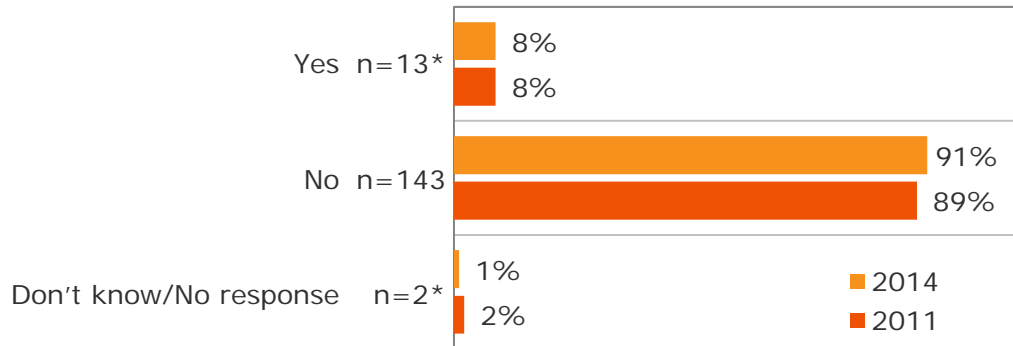
**2014:** „very likely“, „quite likely“, „not very likely“, „don't know“.

**2011:** „will very definitely recommend“, „definitely recommend“, „likely to recommend“, „not very likely to recommend“, „don't know“. In 2011, results “very definitely recommend” + “definitely recommend” were looked at together.

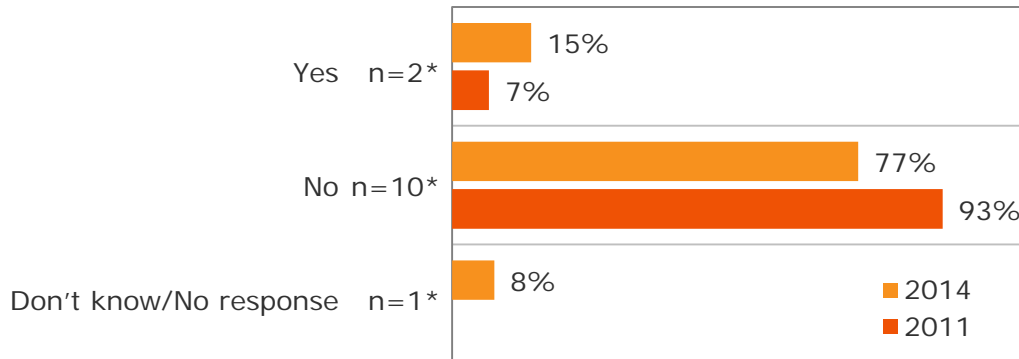
# Information about Tallinn Card and its usage

% of all visitors belonging to the target group  
 % of those who have heard of Tallinn Card

## Do you know or have you heard anything about the Tallinn Card?



## Have you used the Tallinn Card? (of those who have heard of the Tallinn Card)



\* NB! The number of respondents is too small to draw statistically reliable conclusions.

# 5

## Survey team



# Survey team

## The following people participated in and were responsible for the different stages of the survey:

Client's contact person :	Daily Lehtmets, Karen Alamets
Survey plan and report:	Annette Schultz
Sample design:	Katre Seema
Fieldwork coordination:	Marju Kalve
Data processing:	Aivar Felding
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Survey into foreign visitors to Tallinn 2014

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