

# Survey into foreign visitors to Tallinn 2008–2011

Target market: **Cruise voyagers**

TNS Emor  
March 2012



# Table of contents

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## 1

Introduction 3

---

## 2

Planning a trip to Tallinn 9

---

## 3

Visiting Tallinn and impressions of the trip 15

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## 4

Summary 28

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## 5

Further information 30

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# Introduction



# Sample

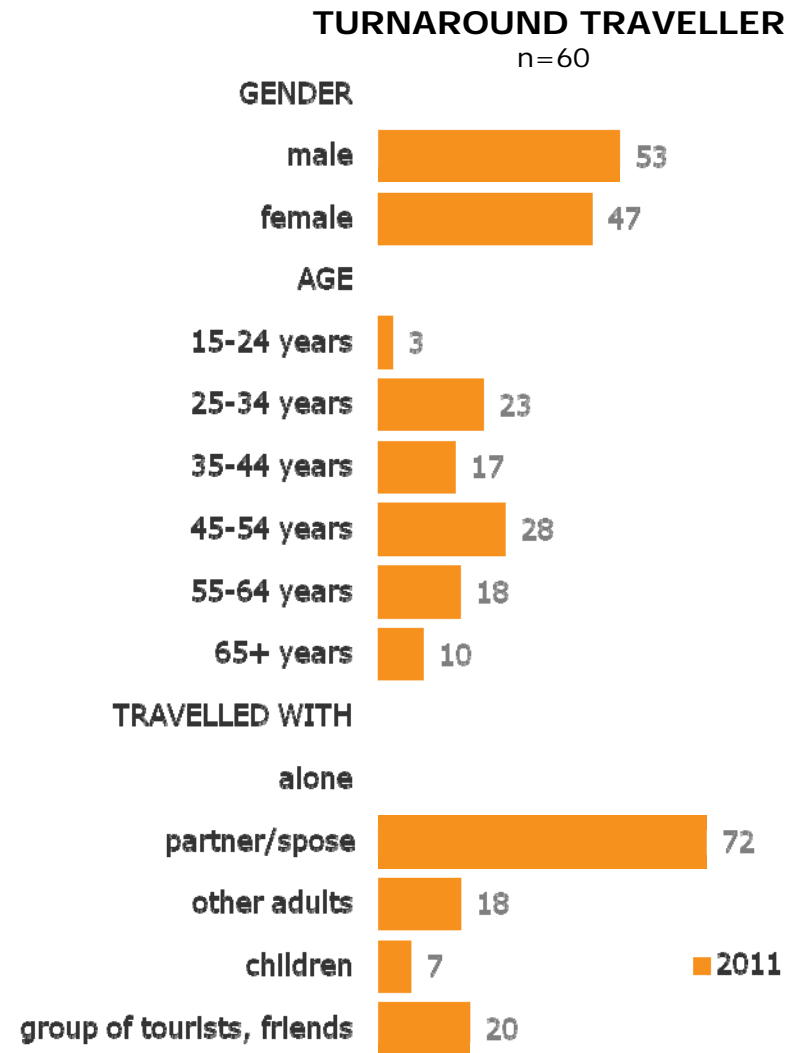
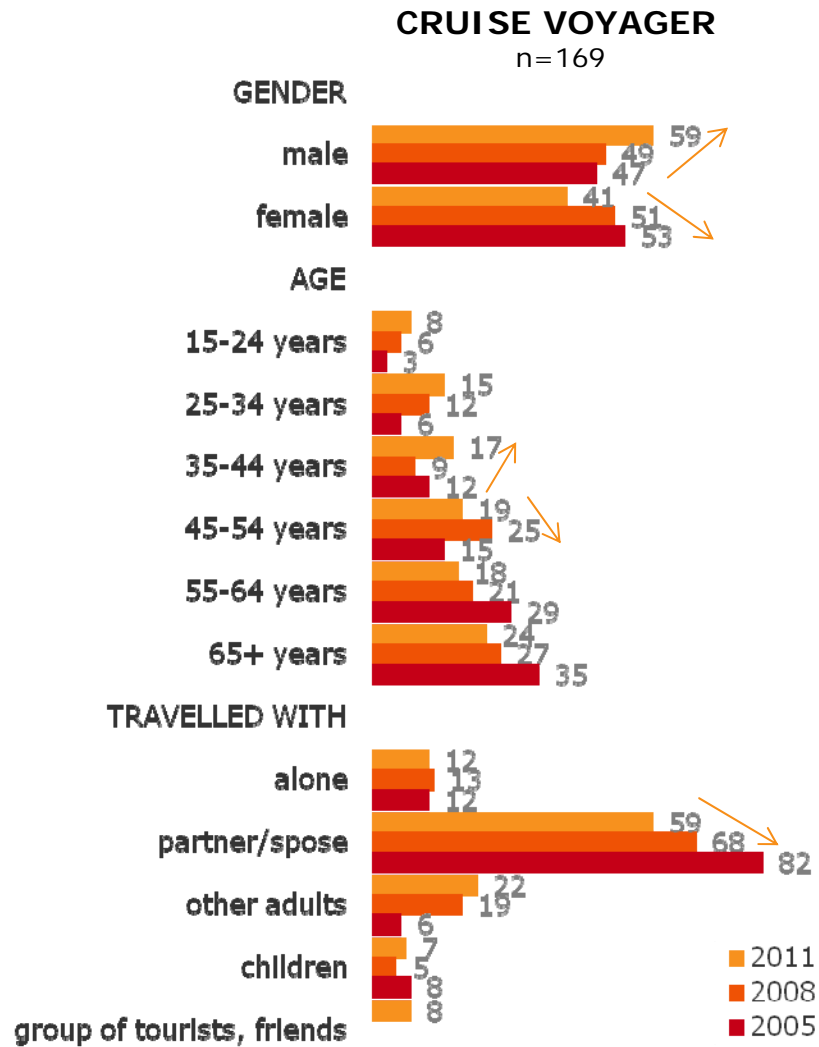
- Size of the sample:
  - 2011 – 169 cruise voyagers and for the first time also 60 turnaround travellers who arrived from Spain on a cruise ship and left by plane from Tallinn airport;
  - 2008 – 154 cruise voyagers;
  - 2005 – 153 cruise voyagers.
- Cruise voyagers were interviewed in cruise ship terminals and turnaround travellers at Tallinn Airport.
- According to the weighing method II of the 2011 sample, cruise voyagers are divided into the following countries:
  - Germany 21%;
  - United Kingdom 18%;
  - United States 18%;
  - Spain 11% (excl. turnaround travellers);
  - Italy 8%;
  - Russia 6%;
  - Other countries 20% (incl. Canada, Australia, Austria, Czech Republic, France, Ireland, Luxembourg, Holland, Norway, Sweden).
- The current report presents results according to weighing method I (see Appendix 2011 to the main report).

# Background to the survey

- The main goal of the survey is to collect detailed data on foreign visitors to Tallinn, the purpose of their trip, evaluations and expenditure made during the trip. The survey reveals:
  - from which countries, how and for how long 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 city;
  - which services aimed at foreign visitors are used and how they evaluate the quality of the services;
  - how much they spend money and on what and how they evaluate the value for money received for the products/services.
- The results of the research serve as an input in evaluating the competitiveness of Tallinn as a tourist attraction and in planning further development activities with the aim of increasing Tallinn revenue from tourism and turning Tallinn into an even more attractive and tourist-friendly city.
- Using the same methodology, the survey of foreign visitors to Tallinn has been ordered by Tallinn City Enterprise Board and has been carried out since year 2002 by TNS Emor. The results of 2011 have been compared to results of 2005 and 2008.
- Terms used in the current report
  - A cruise voyager is a foreign traveller who arrives in Tallinn on a cruise boat, visits Tallinn and does not stay overnight in Tallinn.
  - In terms of ship cruises, turnaround is a procedure of exchanging travellers and in which case the target country serves as the starting as well as ending point. A cruise company called Happy Cruises finished a cruise in Tallinn, sent the travellers off on a plane, picked up new travellers at the airport and went on the next cruise (as described by Port of Tallinn).
  - This report addresses the turnaround traveller as a foreign visitor to Tallinn who comes or goes on a cruise ship and arrives or departs by plane.

# Respondents' profile (1)

% of all visitors in the target group



TNS Emor. Survey into foreign visitors to Tallinn 2011. Cruise voyagers

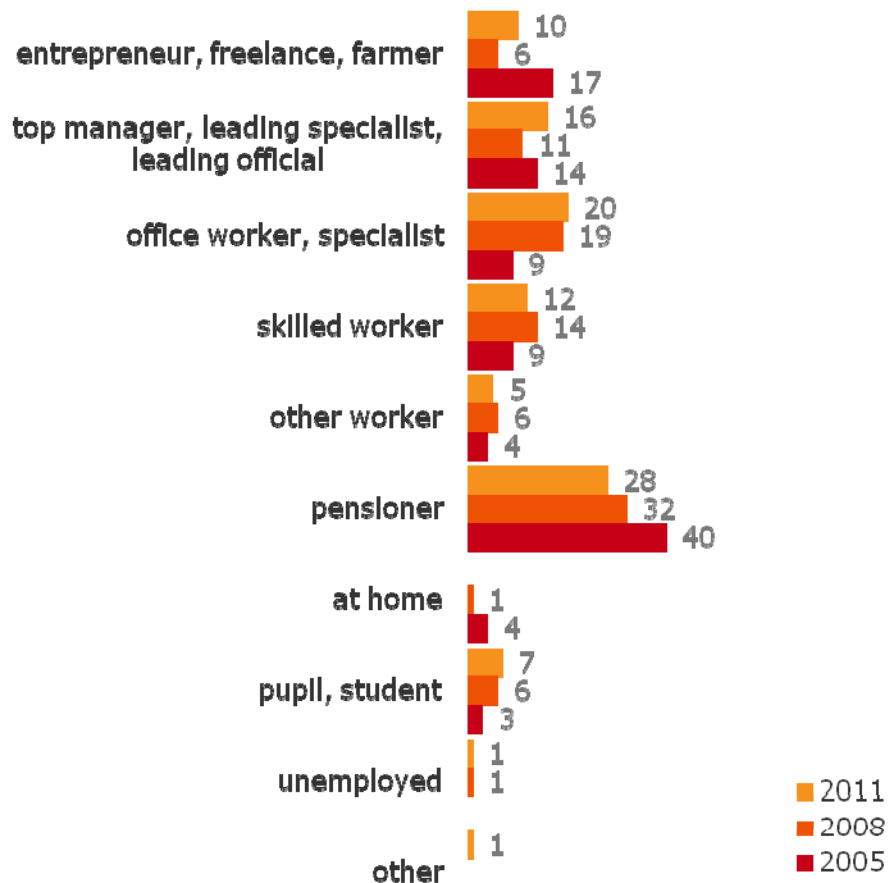
# Respondents' profile (2)

% of all visitors in the target group

## CRUISE VOYAGER

n=169

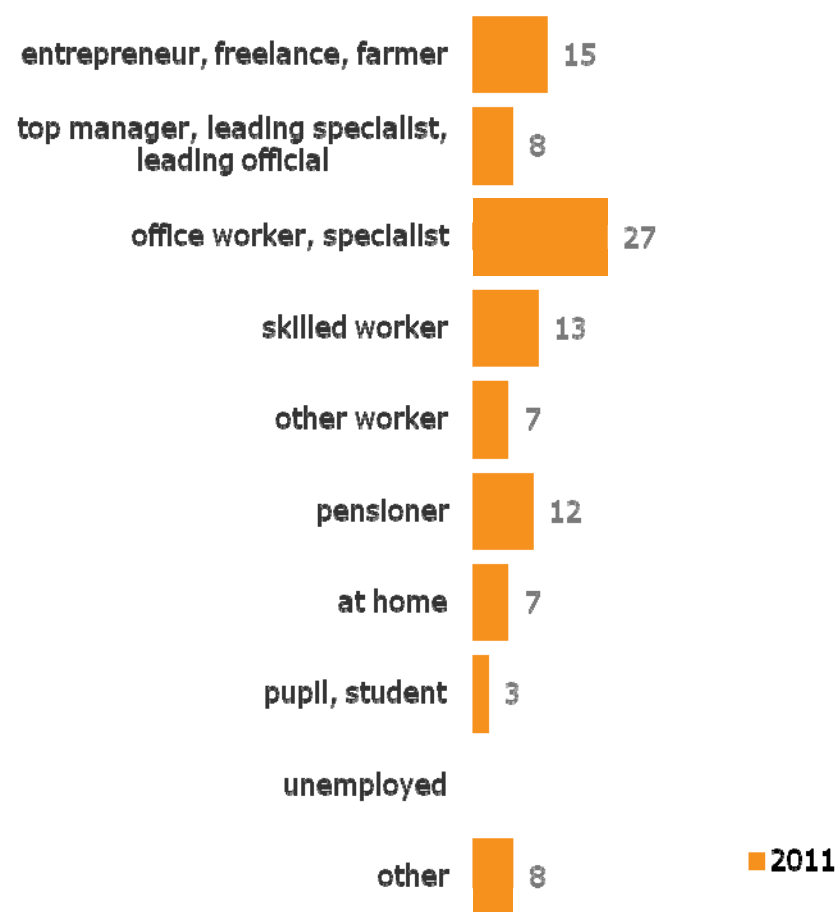
### PROFESSION



## TURNAROUND TRAVELLER

n=60

### STATUS



# Summary

## Profile of cruise voyagers and turnaround travellers

- In 2005, there were more females among **cruise voyagers**. In 2011, however, the proportion of men is larger. The proportion of men has increased throughout all survey years.
- Cruise voyagers are still rather elderly people (over 65 years of age), but in year 2011, the proportion of those in their active working age (up to 44 years old) has also increased. Cruise voyagers travel rather with the close ones (spouse, partner).
- Although, most cruise voyagers are pensioners, their proportion has been decreasing consistently compared to previous years and visitors comprise now a larger number of office staff and specialists. In year 2011, there were also more entrepreneurs and employees in top positions.
- **Turnaround tourists** is a new target group on the Estonian market, which is why there is no comparison with previous periods. The interviewed turnaround tourists include more men, middle aged (45-54 years old) and they travel mostly with a partner/spouse or a group of tourists or friends and they comprise more office workers and specialists.
- Compared to cruise voyagers, most turnaround tourists are slightly younger, travel more often with a partner/spouse or group of tourists or friends.



## Planning a trip to Tallinn

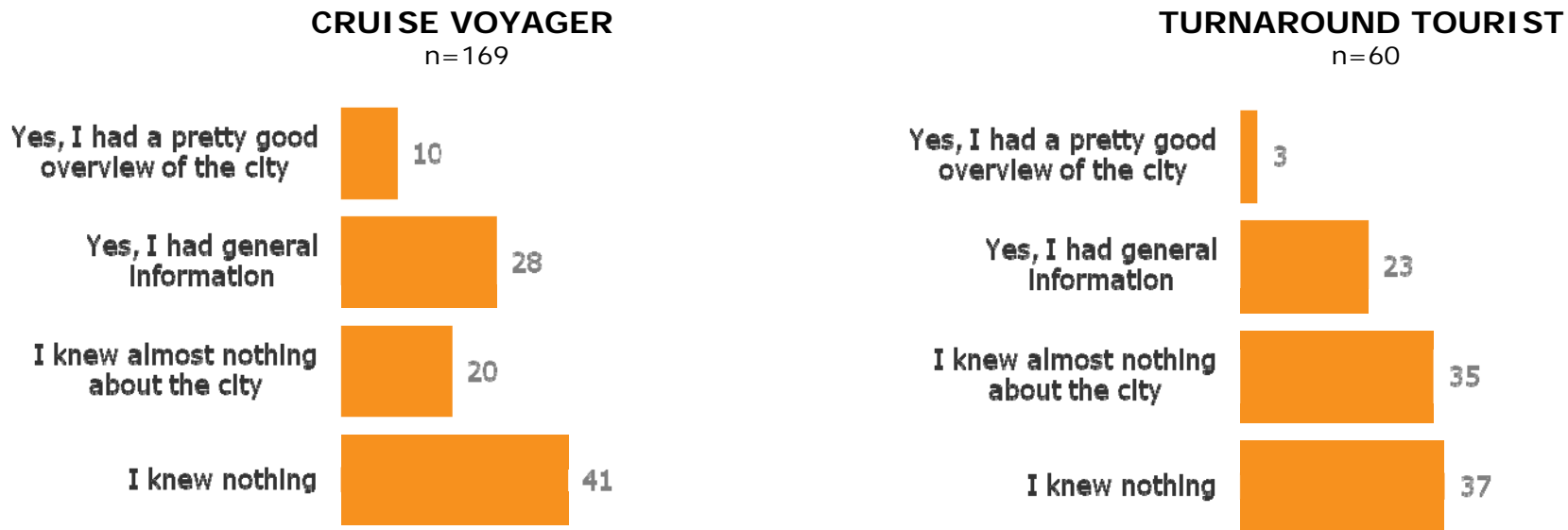


# Knowledge on Tallinn before the trip

## The majority of visitors coming by cruise ship know very little about Tallinn before their arrival

*% of all visitors in the target group*

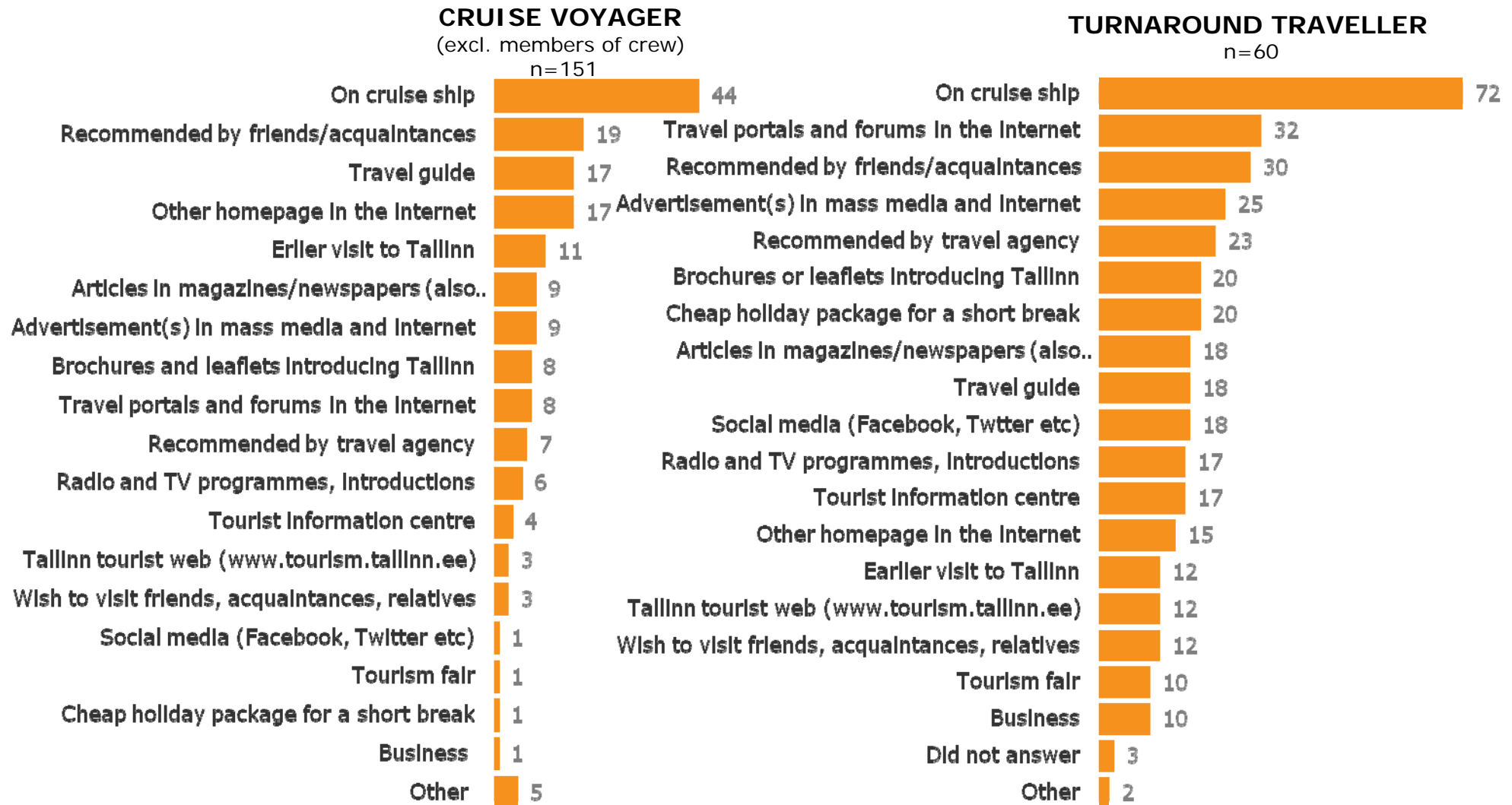
*Since this question was used for the first time, comparable data is not available*



# Information sources on Tallinn before and during the trip

## Information on Tallinn offered on cruise ship was most widely used

% of all visitors in the target group



TNS Emor. Survey into foreign visitors to Tallinn 2011. Cruise voyagers

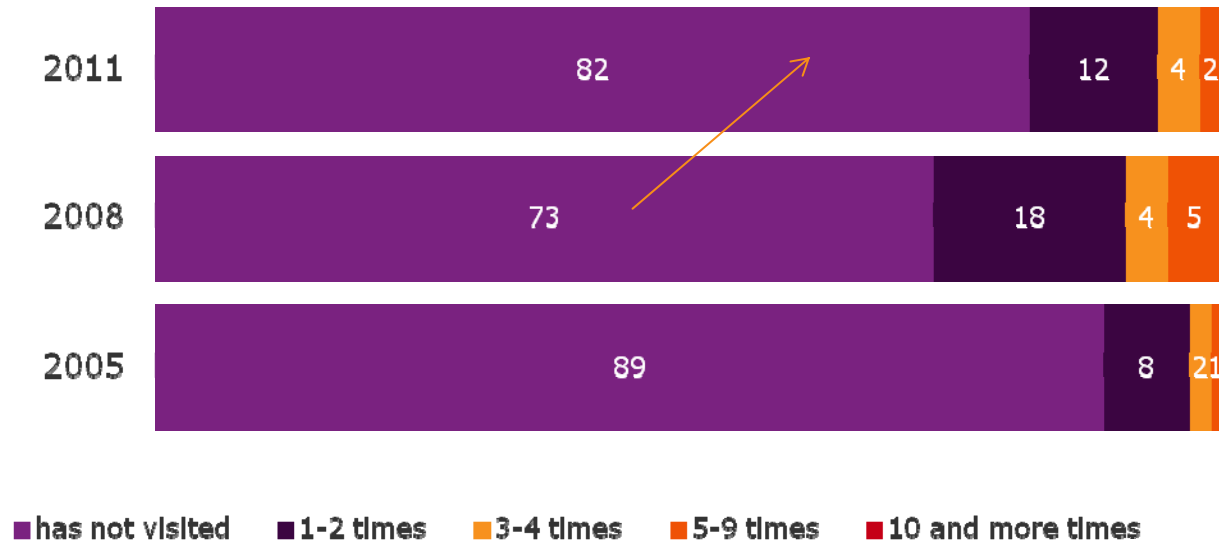


# Previous visit to Tallinn

## Among cruise voyagers, most tourists come for the first time

% of all cruise voyagers, including members of crew, n=169

### CRUISE VOYAGER

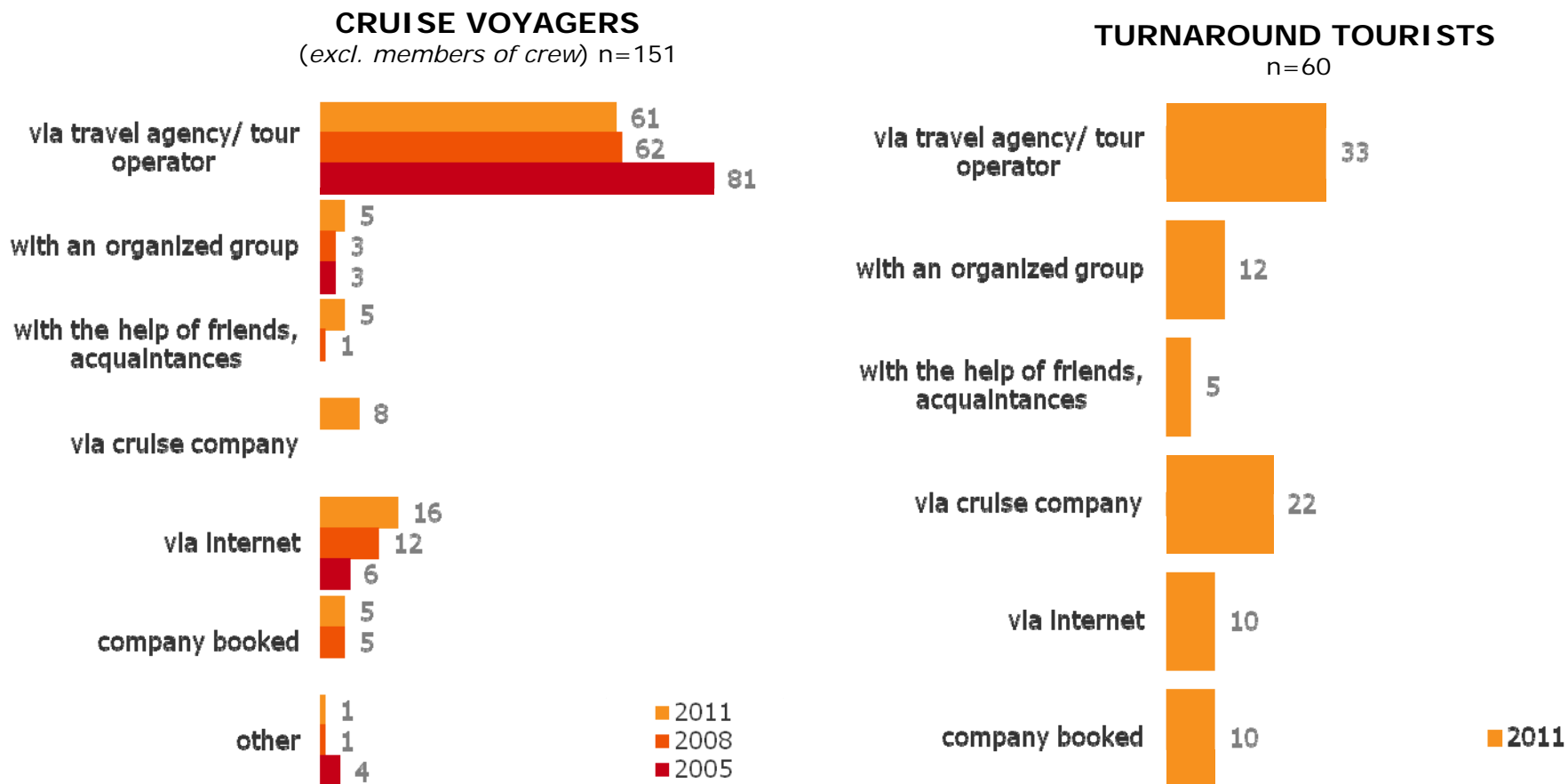


*Of the 60 interviewed Spanish turnaround tourists, none had visited Estonia before.*

# Booking the trip

## Importance of internet has increased

% of all visitors in the target group



\* NB! In 2011 members of crew are excluded with a separate question.



TNS Emor. Survey into foreign visitors to Tallinn 2011. Cruise voyagers

# Summary

## Planning a trip to Tallinn: cruise voyagers and turnaround travellers

- For the first time a question about previous knowledge about Tallinn was included. Generally, previous knowledge about Tallinn both among cruise voyagers and turnaround travellers is rather poor. One third of cruise voyagers and only one fourth of turnaround travellers are relatively well-informed or have general info about the city.
- Knowledge regarding Tallinn both prior and during the trip among cruise voyagers as well as among turnaround travellers mostly comes from a cruise ship, but also from personal contacts, recommendations from friends/relatives or earlier visit to Tallinn. Internet also plays a major role during information search.
- While booking the trip, the services of a travel agent or tour operator are still merely used, in case of turnaround tourists the services of a cruise company are also used. Compared to previous years, cruise voyagers have begun using the internet to book the trip more often.
- Cruise voyagers are still mostly composed of first-time visitors and only two voyagers out of ten have visited Tallinn before. The interviewed turnaround travellers mostly come from Spain and none of them had visited Tallinn before.
- Considering the proportion of respondents who have used information sources, its influence on the decision and what had been achieved by marketing activities in Estonia, the following communication channels have proven to be useful:
  - relationship marketing, including a travel guide, word-of-mouth communication to create positive impressions and a travel agency;
  - handouts: material on the cruise ship introducing the city, including brochures also in other channels;
  - mass communication: links in relevant travel portals, articles on Tallinn in different channels, being on the picture in mass media;
  - social media has not yet become a channel that would create an opinion among cruise voyagers.

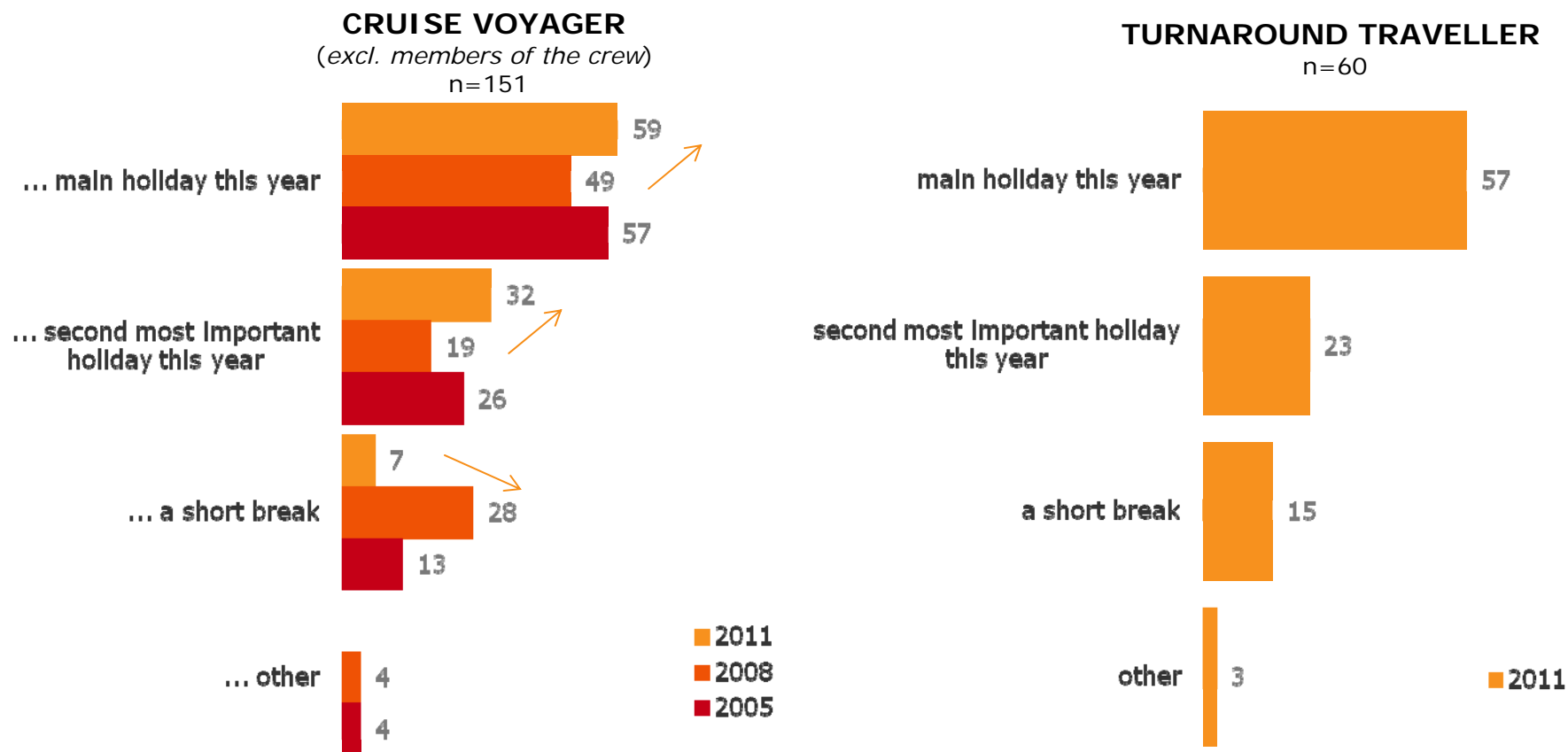
## Visiting Tallinn and impressions of the trip



# Meaning of the holiday

## The main holiday trip for cruise and turnaround travellers

% of all visitors in the target group



TNS Emor. Survey into foreign visitors to Tallinn 2011. Cruise voyagers

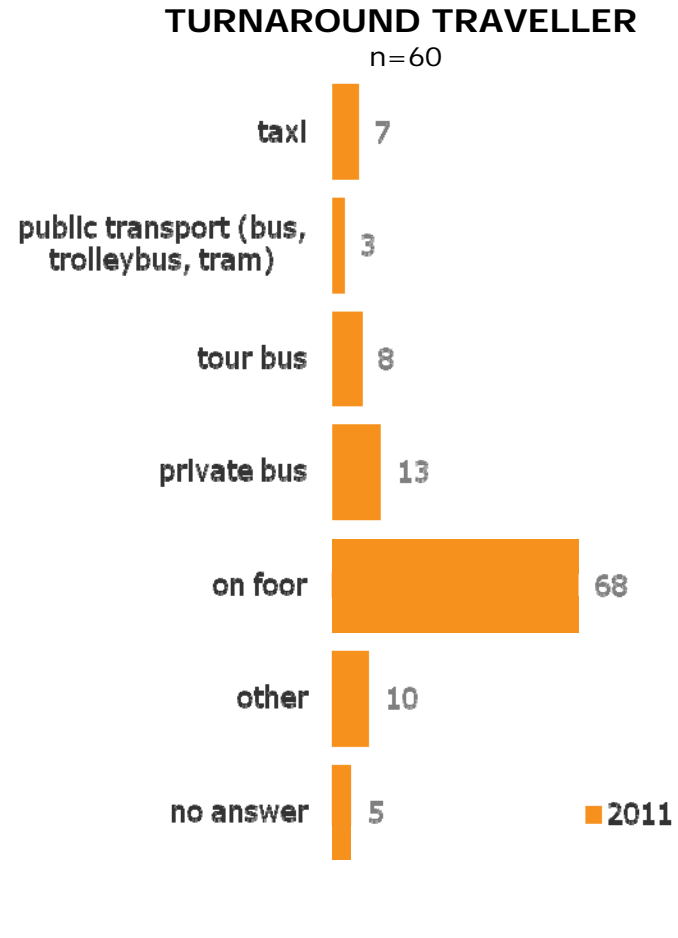
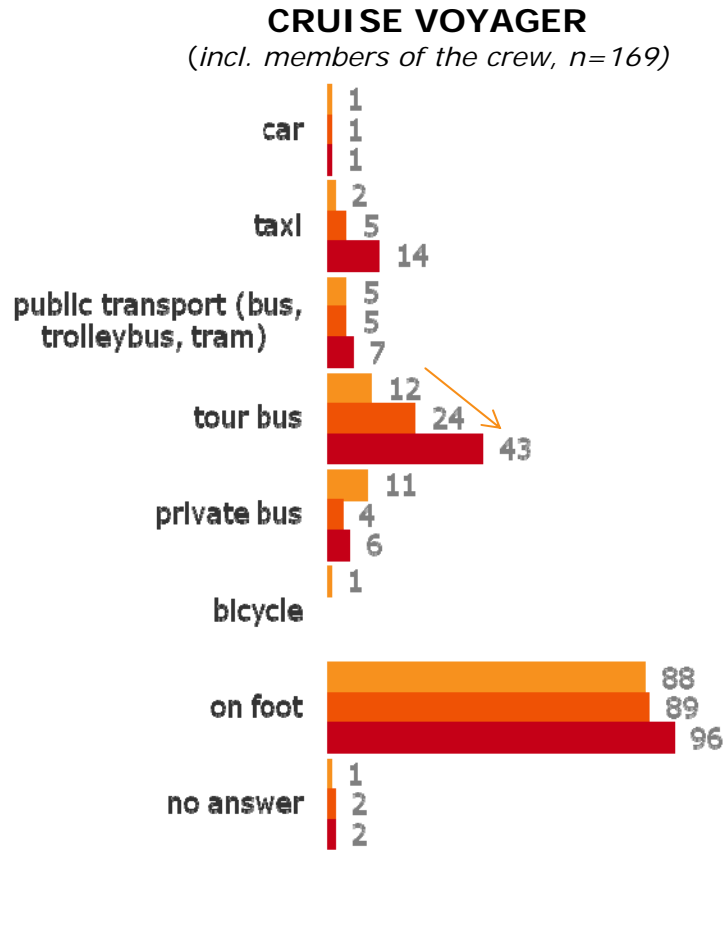


# Transport used in Tallinn

Moving around on foot is still primary

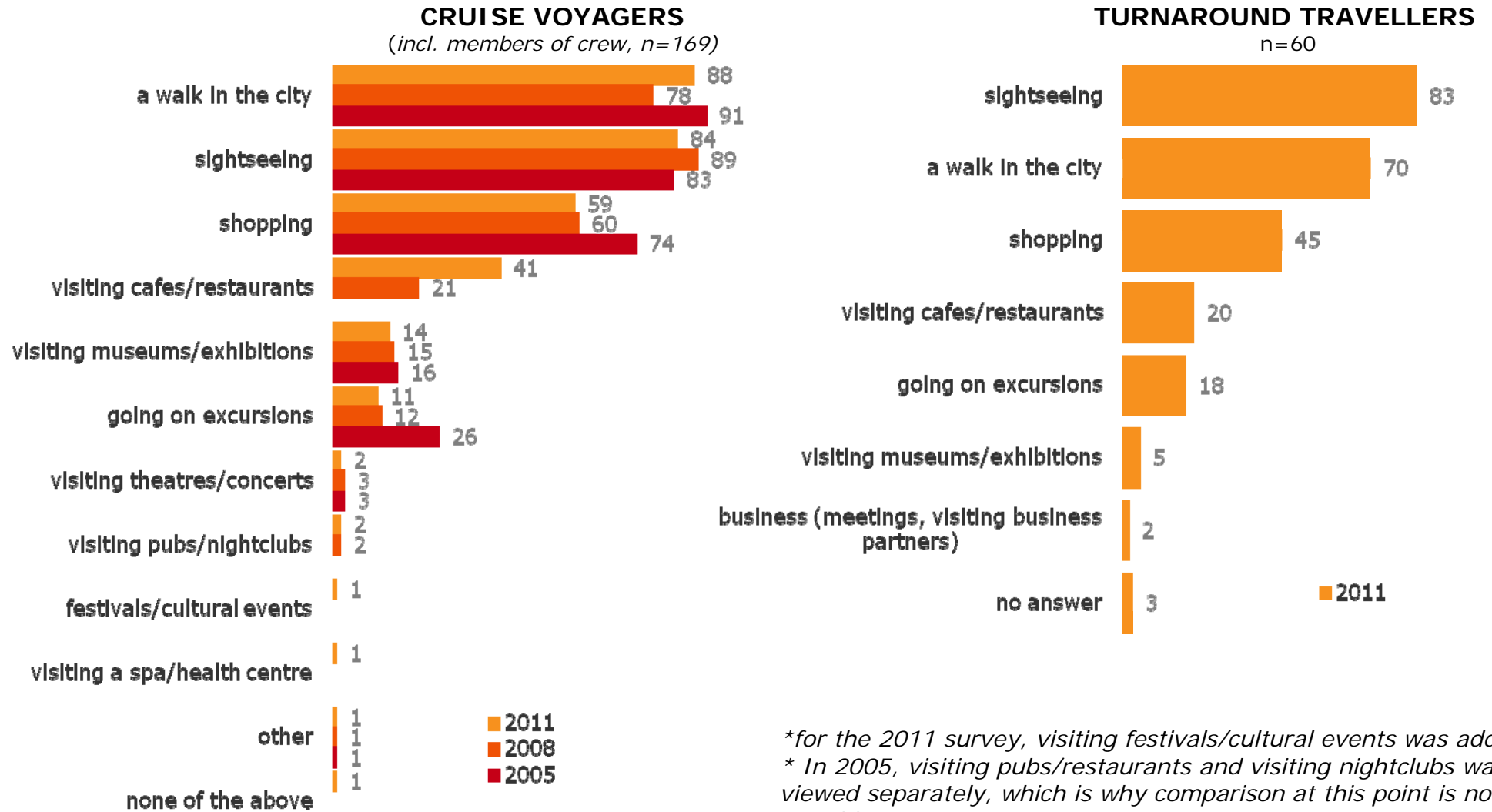
Moving around by tour bus is on the decrease

% of all visitors in the target group



# Activities in Tallinn: walking, sightseeing, shopping and cafes

% of all visitors in the target group



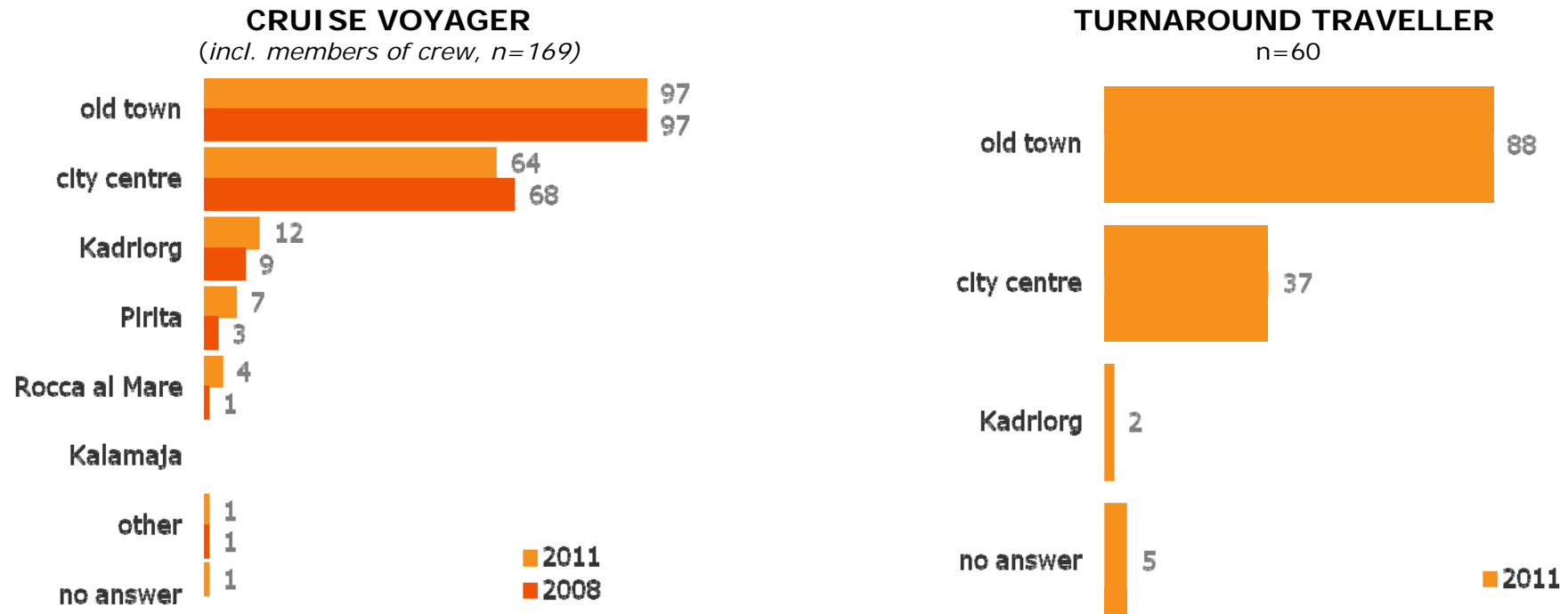
\*for the 2011 survey, visiting festivals/cultural events was added.  
\* In 2005, visiting pubs/restaurants and visiting nightclubs was viewed separately, which is why comparison at this point is not possible.



# Areas visited in Tallinn

## Old town and city centre are visitors' favourites

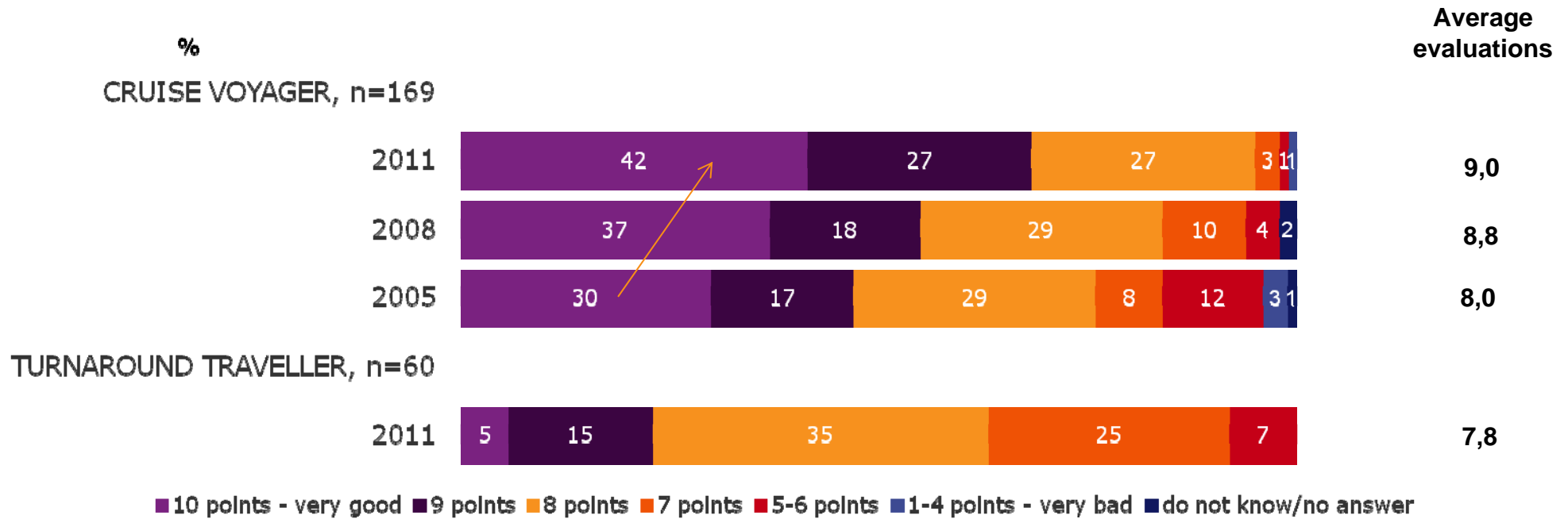
% of all visitors in the target group



# Overall evaluations of a trip to Tallinn

## Average evaluations are on the increase

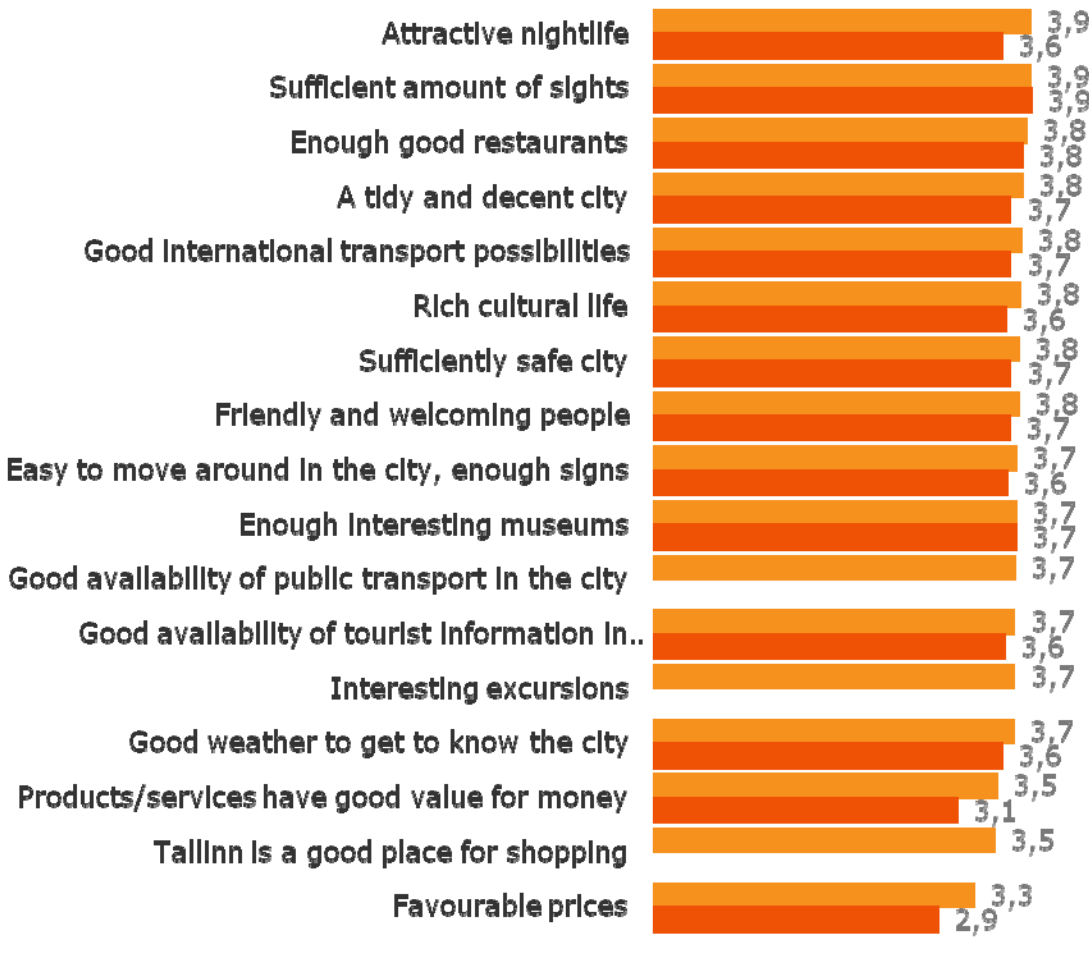
% of all visitors in the target group



# Image of Tallinn as a city

Average evaluations on a 4-point-scale, where 1=minimum and 4=maximum

## CRUISE VOYAGER (incl. members of crew, n=169)



## TURNAROUND TRAVELLER n=60



\*In 2008, the question was about information on public transport, not availability of public transport, which is why comparison is impossible.



TNS Emor. Survey into foreign visitors to Tallinn 2011. Cruise voyagers

# Positive and negative comments on Tallinn

## Opinions of cruise voyagers

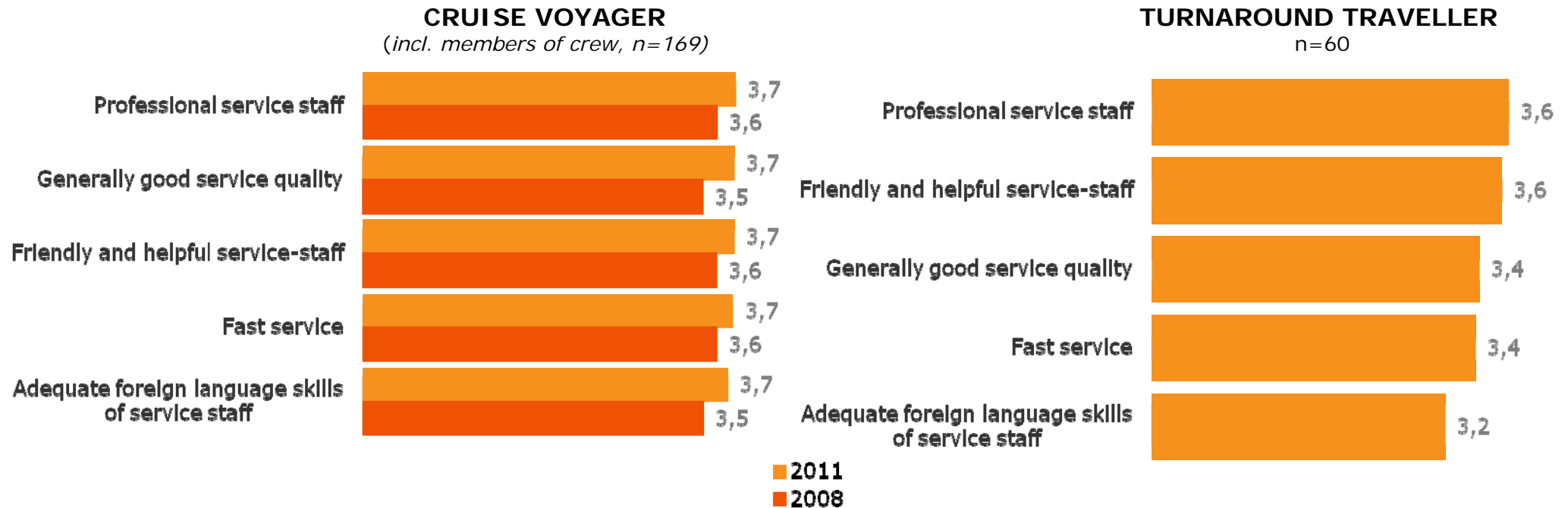
The following summarizes the respondents' open-end comments to questions ...

<i>Would you like to comment on Tallinn – something you are <u>very satisfied</u> with or what was <u>the most positive</u> thing in Tallinn?</i>	<i>Would you like to comment on something that you are <u>dissatisfied</u> with or something that <u>could be better</u> in Tallinn?</i>
Old town	Cold or bad weather
Positive experience with Estonians	Dirty or slippery streets
Other in old town, towers, the wall, roofs, etc	Language problem
Churches	Unfriendly, rude service staff
Town Hall, Town Hall square, the surroundings	Communist-time buildings
Shops, boutiques, shopping centres, department stores	Not enough toilets on the streets
Other parts of Tallinn	Prices have increased
Euro is in use	Difficult to move around for the disabled, obstacles
Freedom Square	

# Service culture in Tallinn

## General evaluations still positive, turnaround travellers are somewhat more critical

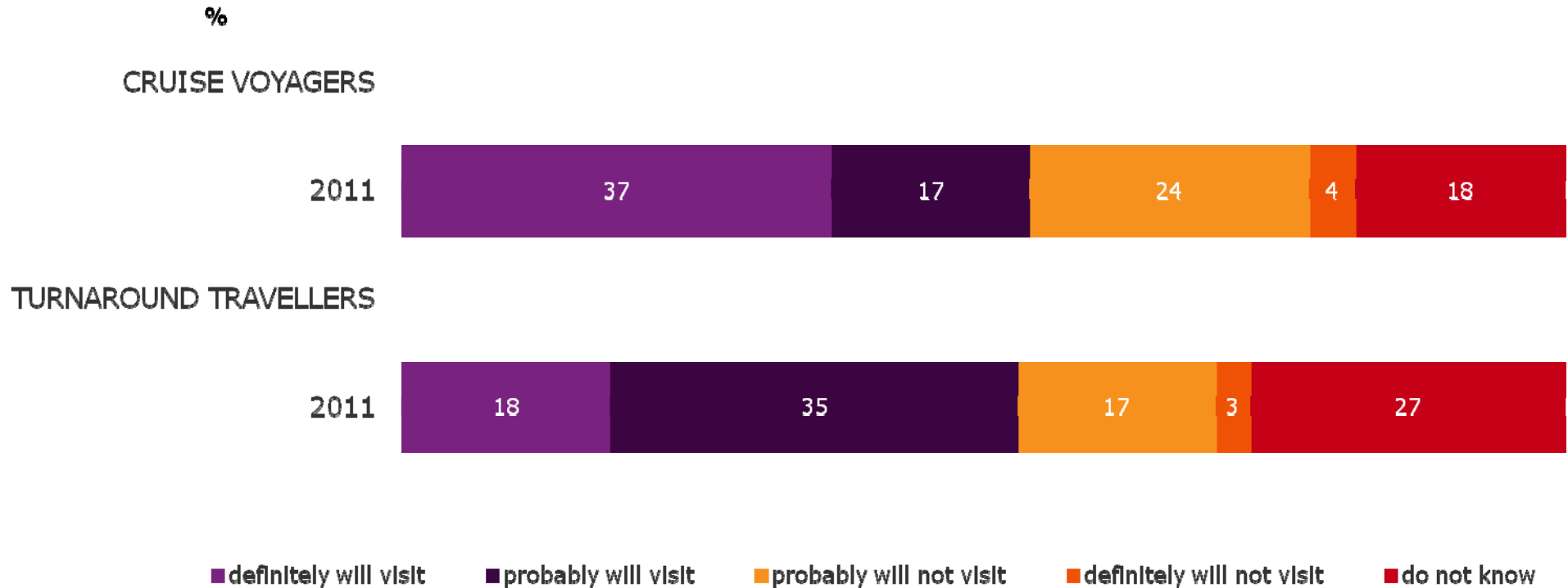
Average evaluations on a 4-point-scale, where 1=minimum and 4=maximum



# Likelihood of visiting Tallinn again

## Half of the visitors would come back to Tallinn

% of all visitors in the target group



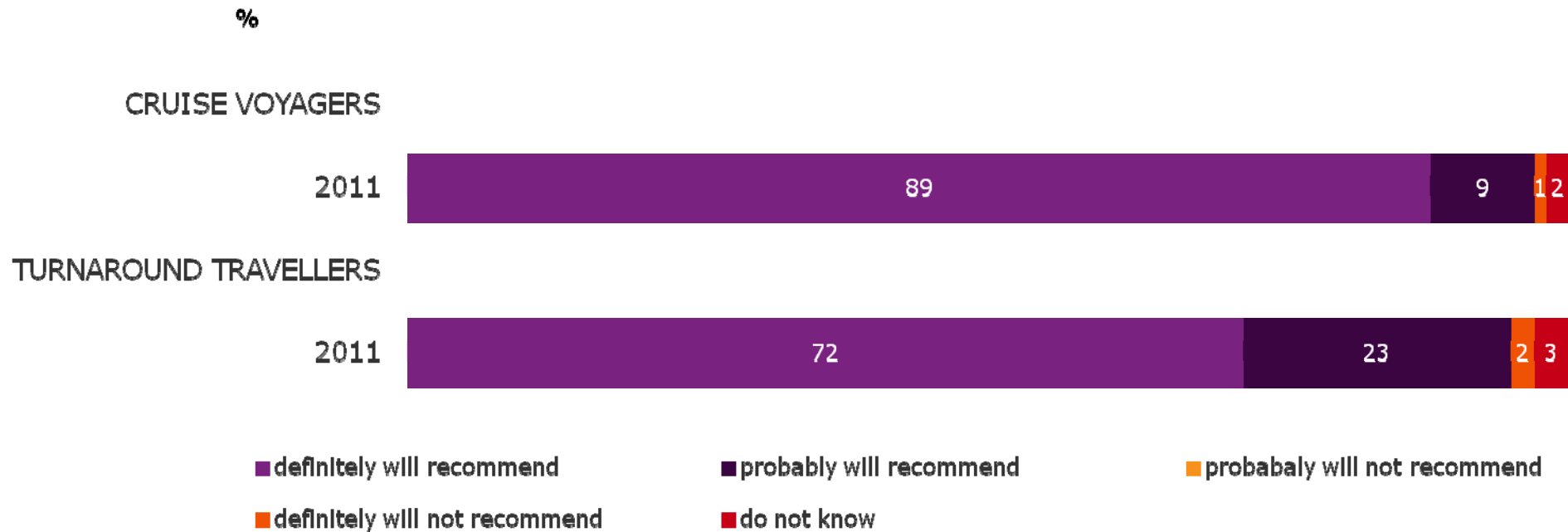
*Compared to year 2008, the scale has been changed, which is why no data is proved on the previous period. Still, one may say that the amount of those who are likely to visit Tallinn again has increased.*



# Recommendation communication

## Nearly all foreign visitors would recommend visiting Tallinn to their friends/acquaintances

% of all visitors in the target group



*Compared to year 2008, the scale has been changed which is why no data is provided on the previous period. Still, one may say that the amount of those who would recommend has increased.*

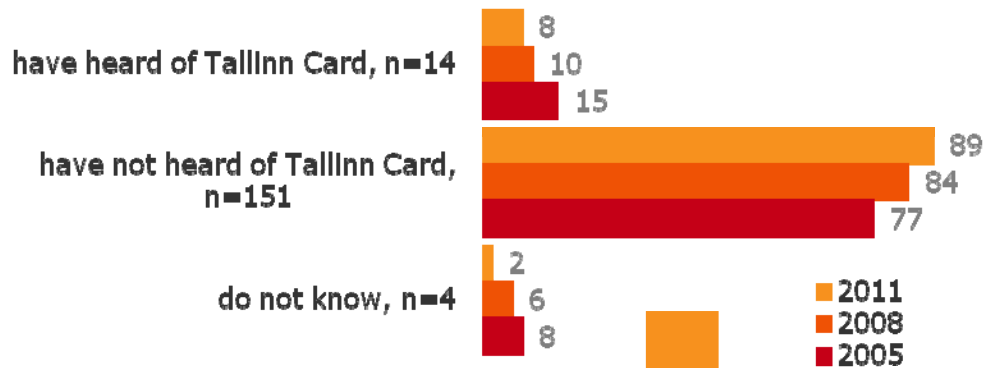
# Information on Tallinn Card and its usage

## Majority of visitors have not heard of Tallinn Card

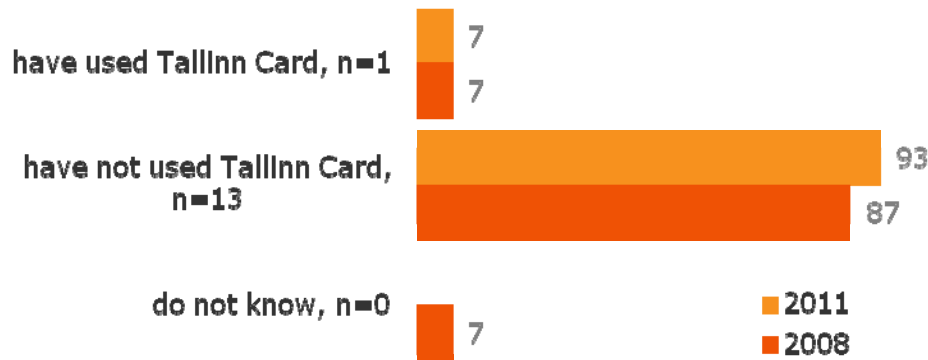
% of all visitors in the target group



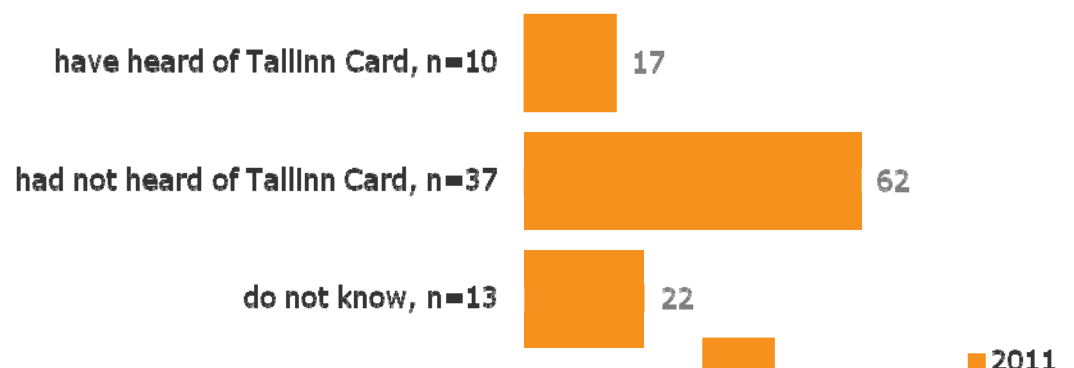
### CRUISE VOYAGER (incl. members of crew, n=169)



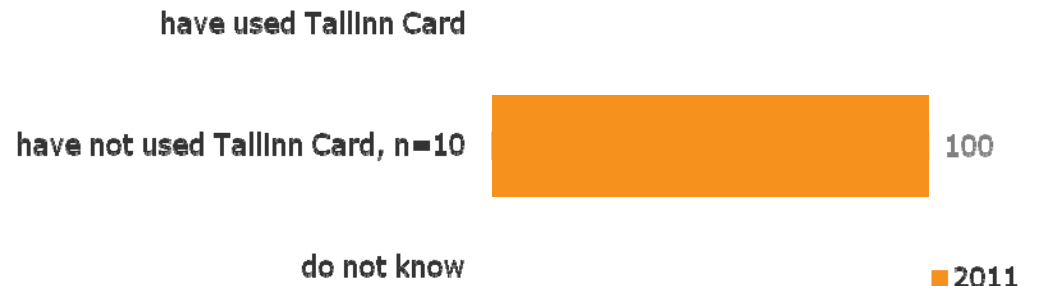
% of all visitors who have spent the night away from home during the trip



### TURNAROUND TRAVELLER n=60



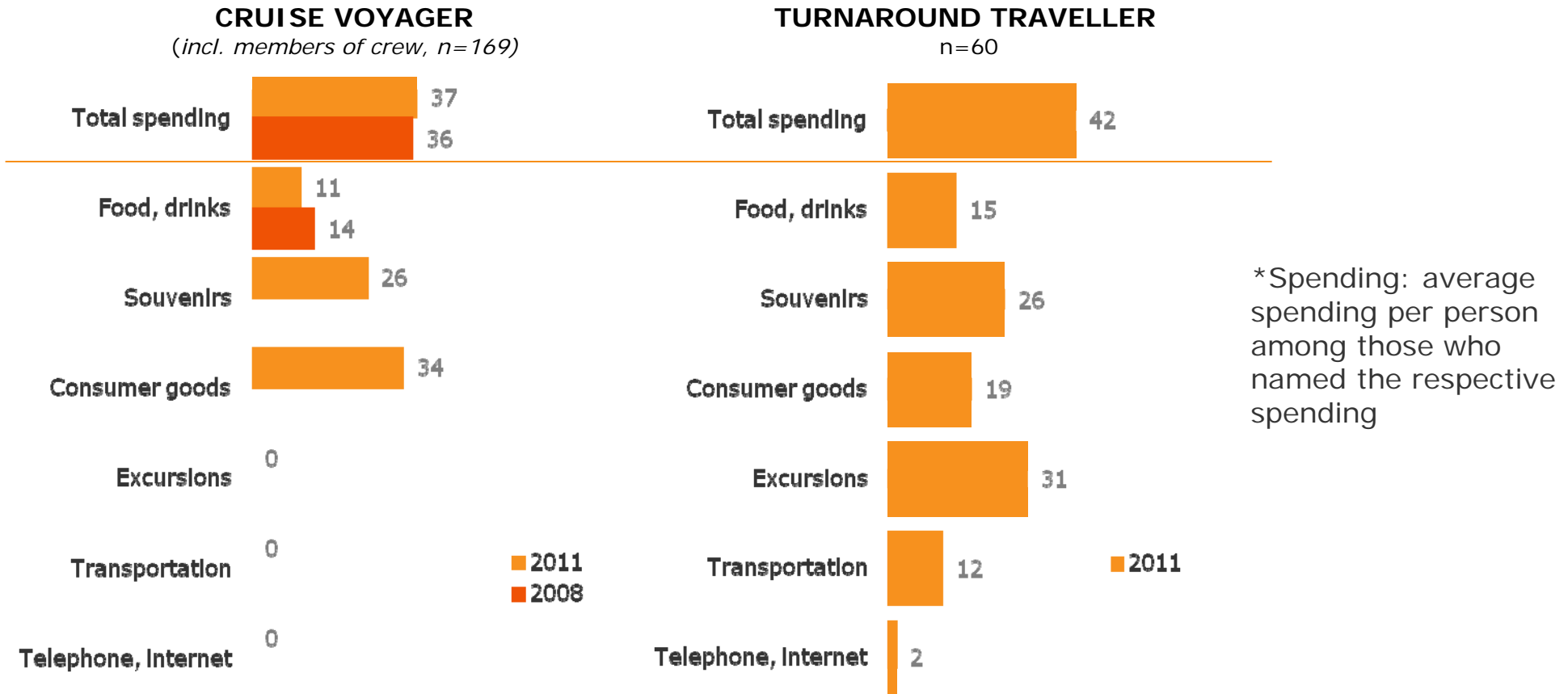
% of all visitors who have spent the night away from home during the trip



# Average spending per person per day while in Tallinn (in EUR)

## Turnaround travellers spend in more categories

Average spending per person per day in EUR



# Summary



# Summary

## cruise voyagers and turnaround travellers account for 16% of foreign visitors to Tallinn

- In 2011, approximately 431 000 cruise travellers arrived in Tallinn (375 000 in 2008 and 272 000 in 2005). For the first time in 2011 turnaround travellers accounted for about 7000 foreign visitors.
- Both for the cruise voyagers and turnaround travellers this was the main holiday of the year. Compared to previous periods, a cruise is becoming more frequently the main or second most important holiday. It is possible that due to the global recession, the proportion of those for whom a cruise is just a short break in their everyday life, has fallen dramatically.
- In Tallinn the visitors move around the city mostly on foot and the usage of sightseeing buses has decreased. Because turnaround tourists spend less time in Tallinn, the use of taxi services is somewhat higher among them.
- Since both cruise voyagers and turnaround travellers spend just one day in Tallinn, their main activities include a walk in the city, sightseeing, shopping and visiting cafes/restaurants.
- Due to the fact that they are one-day travellers, they seldom reach different areas in Tallinn, therefore the main places they visit are the old town and city centre.
- Satisfaction of cruise voyagers with Tallinn is very high (9 points out of 10) and this is rather on the increase. Satisfaction is the highest with sightseeing and active nightlife and their greatest source of dissatisfaction is the high price-level. Turnaround tourists are somewhat more modest in their evaluations (average satisfaction with Tallinn is 7.8 points), but the evaluations are still fairly high. Satisfaction is the highest with sightseeing and good weather (interviews took place in summer) and their biggest sources of dissatisfaction are high prices and quality of products/services.
- Half of the cruise voyagers and turnaround travellers would visit Tallinn again, but cruise voyagers are more certain of their revisit. This may be the case because they have more time to spend in Tallinn, which may result in greater interest in the city. Also, the turnaround travellers of 2011 live geographically farther away (in Spain) than most cruise voyagers which may also be a source of uncertainty regarding the revisit.
- In terms of recommending Tallinn as a travel destination, almost all cruise voyagers and turnaround travellers are convinced that they would definitely or probably recommend travelling to Tallinn.
- Most visitors have not heard anything of Tallinn Card and none of the respondents in the target group had used it. At this point one must also bear in mind the small number of respondents which makes it impossible to draw statistically significant conclusions.
- Compared to year 2008, the expenditures of cruise voyagers has remained more or less the same (a small increase in total spending may be due to increased prices in Estonia). Turnaround tourists, however, spend more than the average cruise voyager since Tallinn is also their departure or arrival point.

## Further information

- The following people participated and were responsible at different stages of the research :

Client: Karen Alamets  
Project manager of the survey

plan and report : Esta Kaal, Annette Schultz  
Sample design: Mare Lepik  
Questionnaire programming: Kai Paap  
Interview coordination: Marju Kalve  
Data processing: Kai Paap  
Graphics: Annette Schultz

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