

Tallinn visitor survey
2008-2014
Summary report

March 2015



TNS Emor
Tallinn visitor survey 2014
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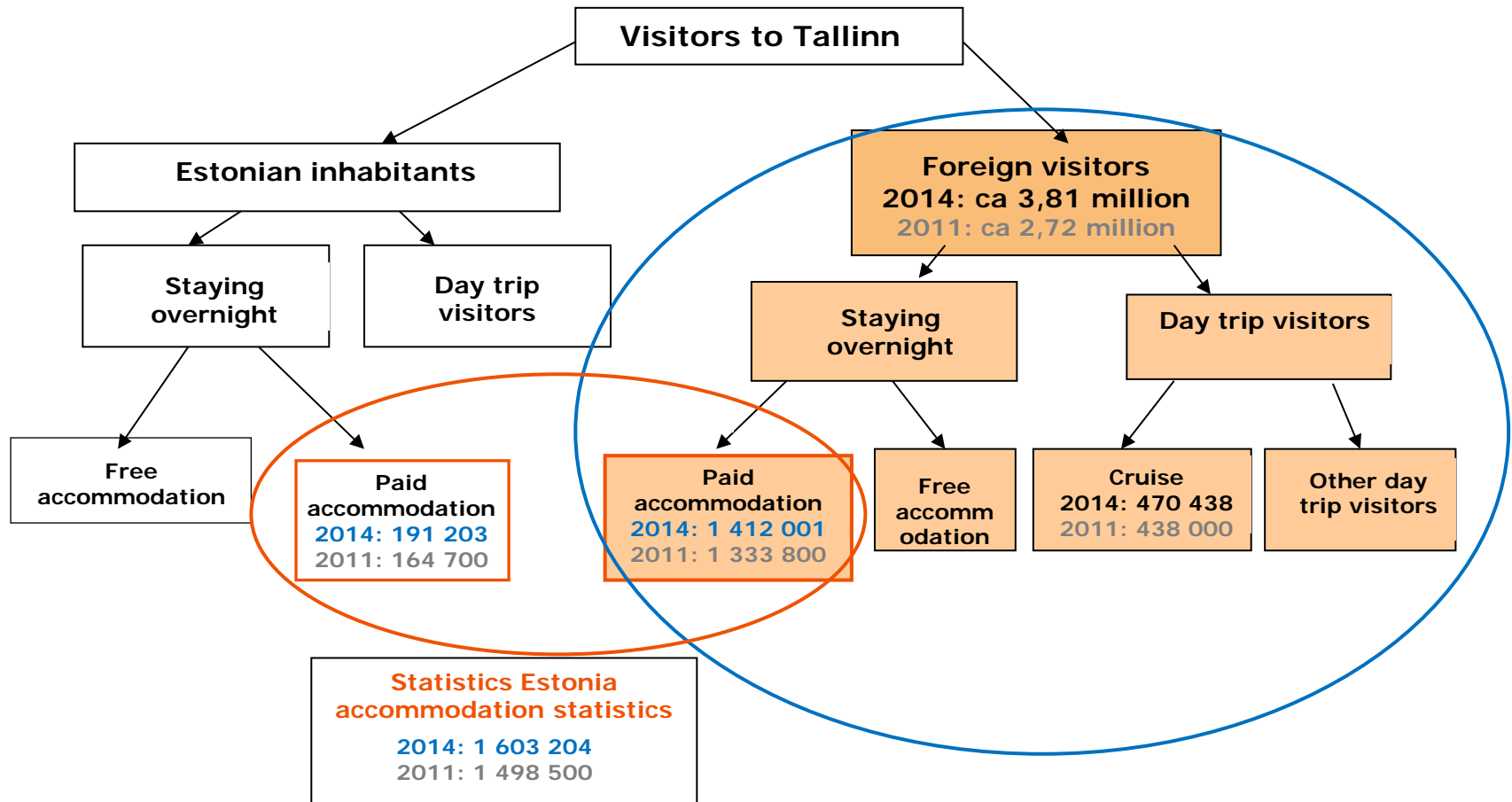
Introduction and background of foreign visitors to Tallinn



Introduction

- 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. Data is collected throughout the survey year among foreign visitors leaving the country via mainland border crossings, Port of Tallinn, Tallinn Airport and Tallinn Bus Station.
- **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.
- In conclusion, the survey results are the input to evaluating the competitiveness of Tallinn as a tourism destination and making plans for development. The objective of this is to increase income from tourism and make Tallinn even more attractive and tourist friendly.
- The survey results are weighted according to the proportion of the total population of foreign visitors (see weighting methods and samples in Appendices). The results of 2014 have been compared to results of 2011 and 2008.
- This report describes foreign visitors to Tallinn on the whole, there are separately compiled reports on cruise passengers and foreign visitors from Finland, Russia, Latvia, Sweden and Norway, United Kingdom and Germany.

Target groups of the foreign visitor survey and existing accommodation statistics 2014



2

Foreign visitors to Tallinn 2014 (incl. cruise passengers)



Summary

Foreign visitors in 2014, incl. cruise passengers

- Taking into account the statistics from Statistics Estonia and Port of Tallinn, in 2014 the total of approximately **3,81 million foreign visitors** visited Tallinn, 1,94 million or 51% stayed overnight (37% stayed at paid accommodation establishments and 14% stayed with friends, relatives), 1,4 million spent only one day in Tallinn and the number of cruise passengers in 2014 was 0,470 million or 12%.
- Looking at all foreign visitors combined, the proportions of men-women and different age groups are more or less similar. At the same time, there are some differences in the breakdown of different types of foreign visitors:
 - Men spend the night at accommodation establishments more frequently than on the average and women spend the night with friends/acquaintances more often than on the average.
 - 45-54-year-olds stay at accommodation establishments more often than on the average and cruise passengers tend to be older, 65+.
- Every fourth foreign visitor arrives in Tallinn alone but they spend the night with friends/ acquaintances more frequently than others.
- The most common travel companion is a partner/spouse (43%) but their number is above average among cruise passengers. There are also more visitors with children among cruise passengers.
- 45% of all foreign visitors are white collar workers, staying more frequently at paid accommodation establishments. There are more pensioners among cruise passengers and more workers and unemployed people among daytrip visitors.

Assessment of the total number and structure of foreign visitors in 2014

Compared to 2011, the estimated increase in foreign visitors was 40%

	Paid and free accommodation		Day trip visitors		Cruise passengers		TOTAL		% of all foreign visitors	
	2014	2011	2014	2011	2014	2011	2014	2011	2014	2011
Finland	746 118 ↑	634811	993 085 ↑	496759	8 645		1 747 848 ↑	1 131 570	46%	42%
Sweden	57 419 ↓	71808	29 579 ↓	36174	1 551		88 549 ↓	107982	2%	4%
Norway	36 416 ↓	49033	5 586 ↑	4033	1 493		43 495 ↓	53066	1%	2%
United Kingdom	49 954 ↓	69902	9 303 ↓	9986	64 342 ↓	65700	123 599 ↓	145588	3%	5%
Germany	94 820 ↑	87990	9 607 ↑	4534	118 263 ↑	83220	222 690 ↑	175744	6%	6%
Russia	246 593 ↑	217479	111 307 ↑	81667	11 014 ↓	21900	368 914 ↑	321046	10%	12%
Latvia	69 703 ↑	69107	29 167 ↑	6918	23		98 893 ↑	76025	3%	3%
Other countries	640 580 ↑	325206	214 667 ↑	83858	26 5107 ↑	214620	1 120 354 ↑	623684	29%	26%
Total:	1 941 603 ↑	1552127	1 402 301 ↑	729300	470 438 ↑	438000	3 814 342 ↑	2719427	100%	100%

Data sources: number of accommodated foreign tourists is presented based on accommodation statistics by Statistics Estonia for 2014.

The number of tourists using free accommodation is estimated based on the Tallinn foreign visitor survey.

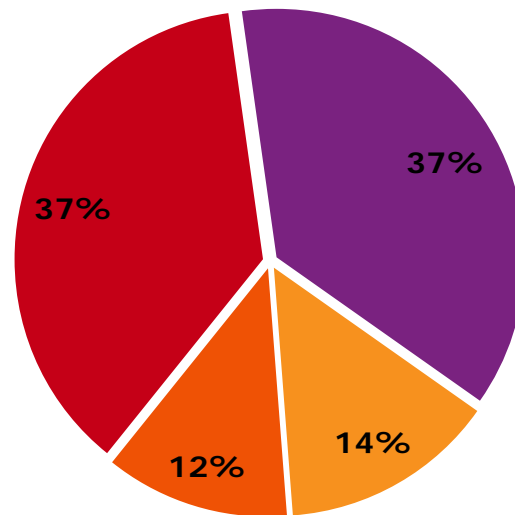
Number of day trip visitors is estimated based on the Tallinn foreign visitor survey.

Number of cruise passengers is based on statistics by Port of Tallinn.

↑ Has increased compared to 2011

↓ Has decreased compared to 2011

Distribution of foreign visitors to Tallinn in 2014, taking into account cruise passengers

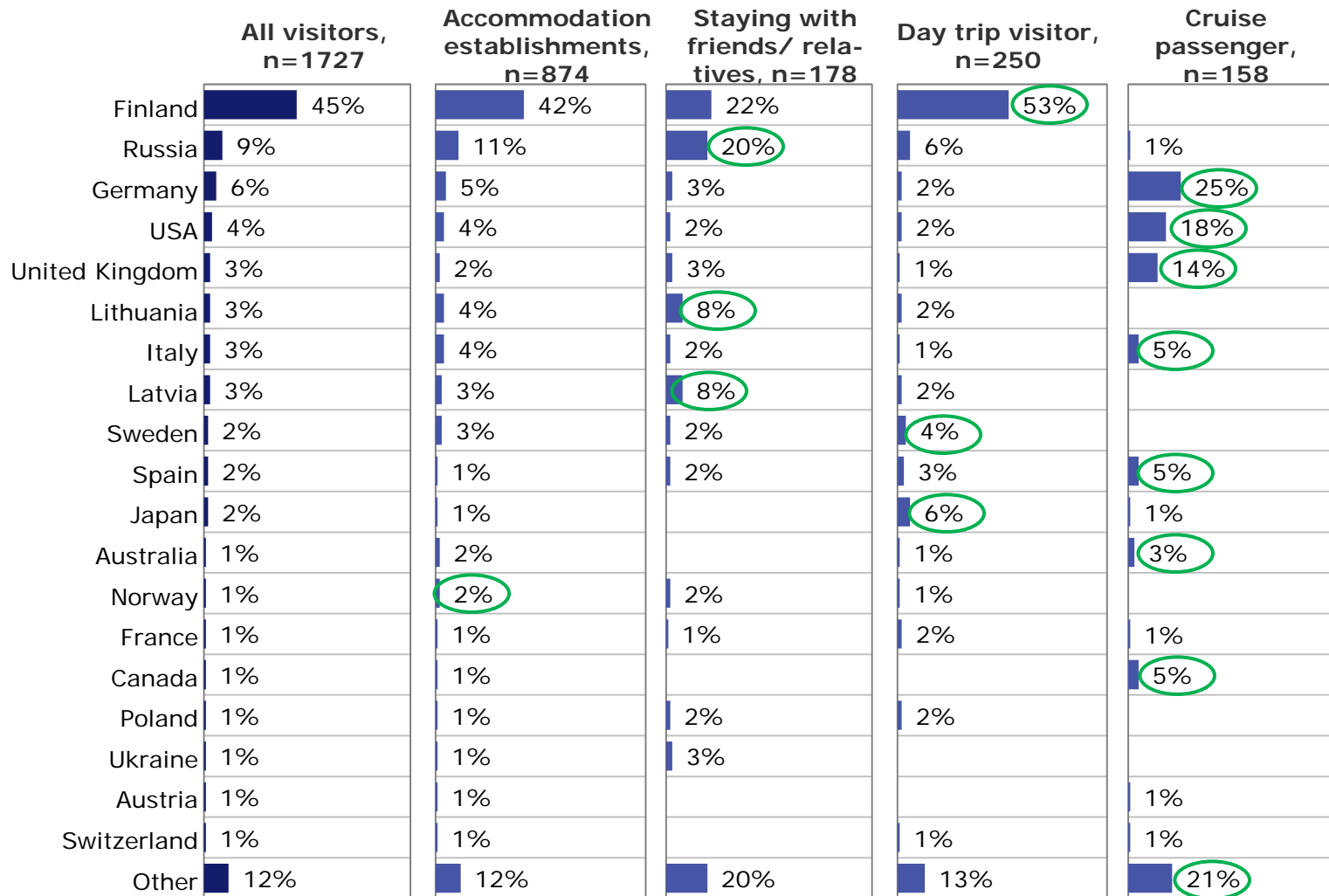


- staying at accommodation establishments
- staying with friends/relatives
- cruise passengers
- other daytrip visitors

Foreign visitors' profile (1): country of residence 2014

% of all visitors, incl. cruise passengers, n=1727

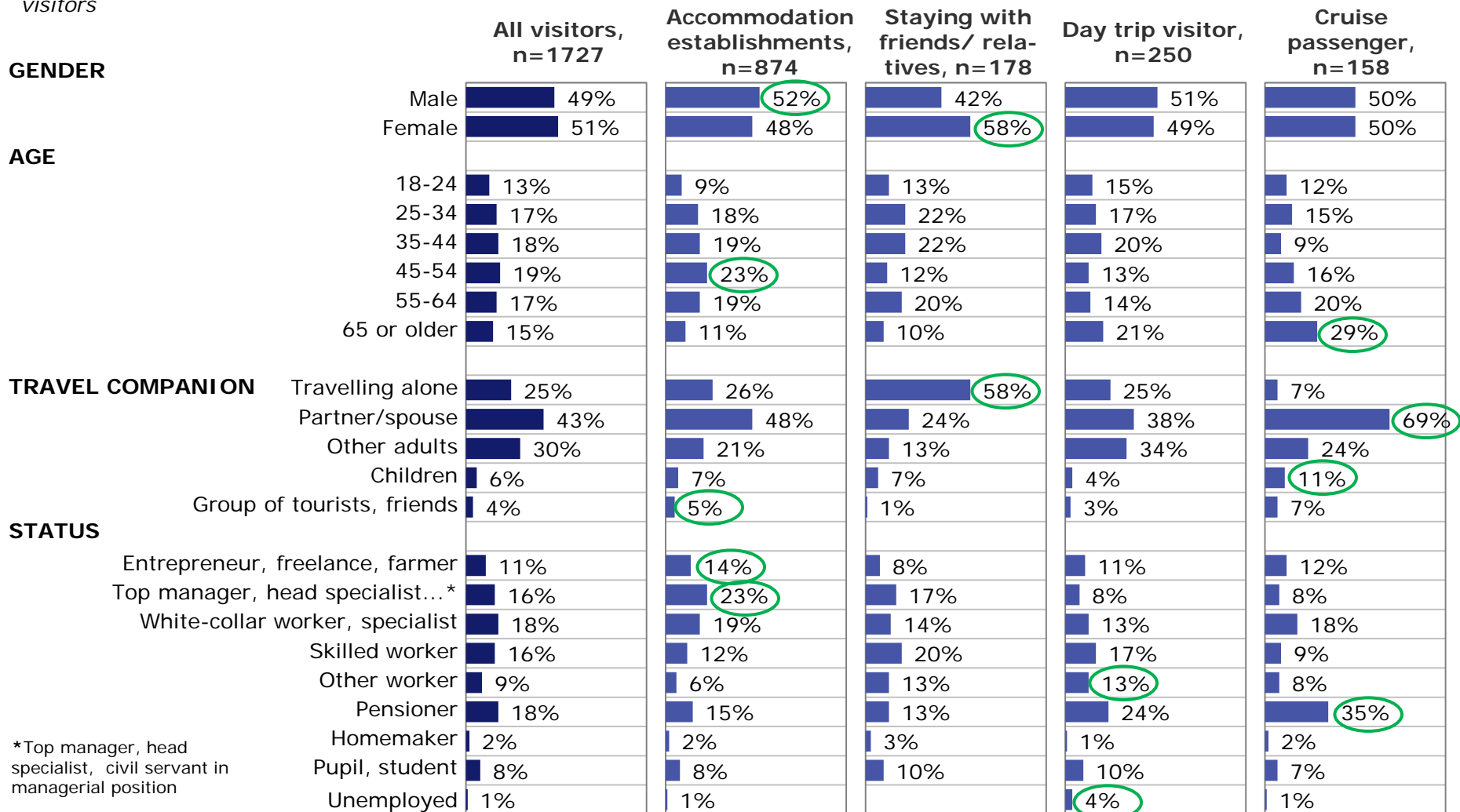
○ notes the statistically significantly larger share of the target group compared to the average of all visitors



Foreign visitors' profile (2): 2014

% of all visitors, incl. cruise passengers, n=1727

○ notes the statistically significantly larger share of the target group compared to the average of all visitors



*Top manager, head specialist, civil servant in managerial position

3

Foreign visitors to Tallinn 2011–2014 (*excl. cruise passengers*)



Summary

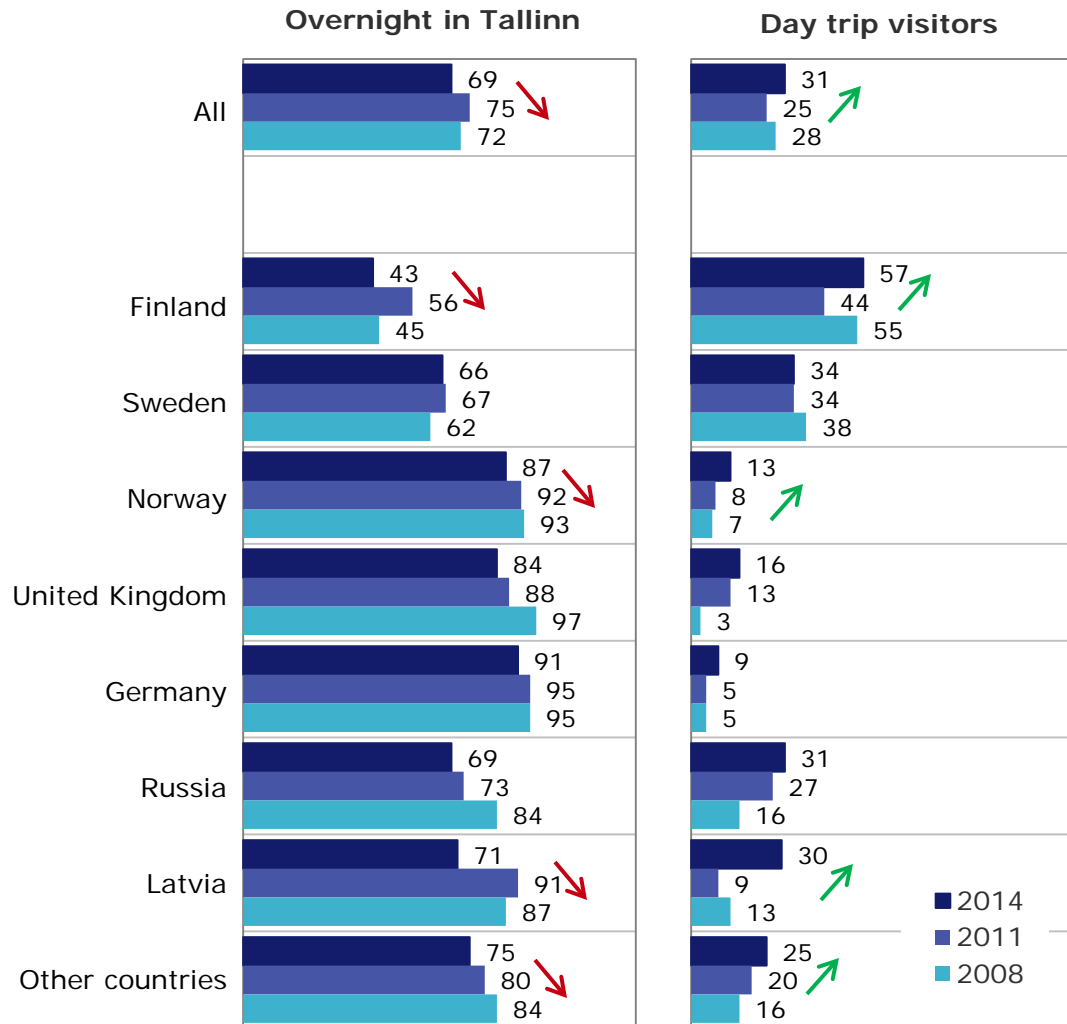
Main changes from 2008 to 2014

- **In 2014, a record number of foreign visitors came to Tallinn - 3,34 million**, this is the highest number during the last ten years (in 2011 the number of visitors to Tallinn was 2,28 million, in 2008 - 2,58 million and in 2005 - 2,68 million). Compared to 2011 the number of visitors who come to Tallinn for only a day has almost doubled and mainly due to visitors from Finland and other countries (that are not the target countries for Tallinn at the moment). Also, the number of visitors who stay in Tallinn overnight has increased significantly.
- The largest number of foreign visitors to Tallinn are Finnish (52%), this share has remained more or less stable since 2008. A significant share of tourists to Tallinn is made up of visitors from Russia, their share has remained the same during the last survey years (11% in 2014 and 13% in 2011). Here, the Russian rouble weakening on the world market and political events have likely had an impact.
- Compared to 2011, there has been a small decrease (-6%) in the share of those foreign visitors to Tallinn who stay overnight in Tallinn and there has been an increase in the share of those tourists coming on day trips. The shares of visitors staying overnight have decreased primarily in case of foreign visitors from Latvia, Finland and Norway.
- There haven't been any big changes in the socio-demographic background of foreign visitors to Tallinn during the last three survey years. The share of men and women continues to be 50-50 and that in all age groups. Almost seven out of ten foreign visitors (69%) travel with a partner/spouse or other adults, a quarter of the tourists travel to Tallinn alone. Also, there haven't been any significant changes in the professional/status profile of visitors, there has been a small decrease in the share of pupils/students.

Changes in the profile of foreign tourists to Tallinn 2008–2014

The share of day trip visitors has increased

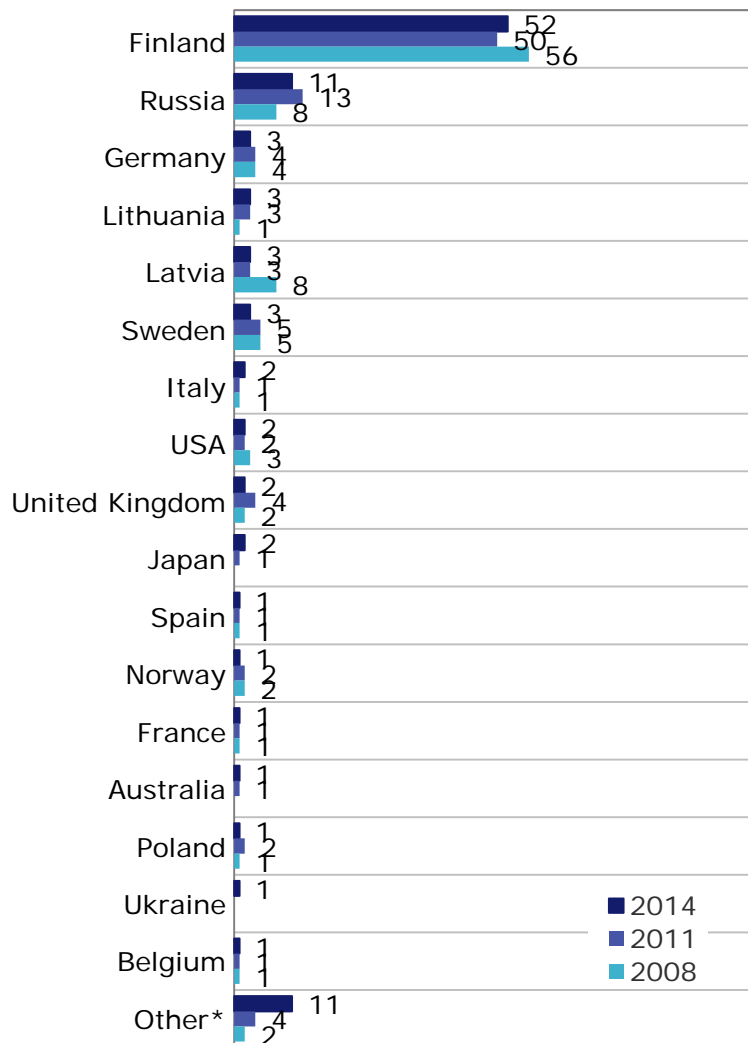
% of visitors to Tallinn (excl. cruise), n=1569



- Compared to 2011, the share of all foreign visitors staying overnight in Tallinn has decreased by 6%, the share of day trip visitors has increased.
- During the last three years staying overnight in Tallinn has decreased mainly among Latvians, Finns, Norwegians and visitors from other countries.

Foreign visitors' country of residence

% of visitors to Tallinn (excl. cruise), n=1569



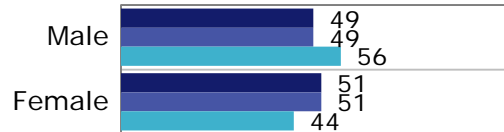
Option "Other" included the following countries:

- Austria
- Switzerland
- Denmark
- Ireland
- Luxembourg
- Portugal
- Holland
- Slovakia
- Hungary
- Slovenia
- Czech Republic
- India
- Kazakhstan
- Belarus
- The Philippines
- Canada
- Argentina
- Azerbaijan
- Egypt
- Ghana
- Cyprus
- South-Korea
- South African Republic
- Mexico
- Nigeria
- Portugal
- Romania
- New-Zealand
- Moldova
- China
- Brazil
- Singapore
- Taiwan

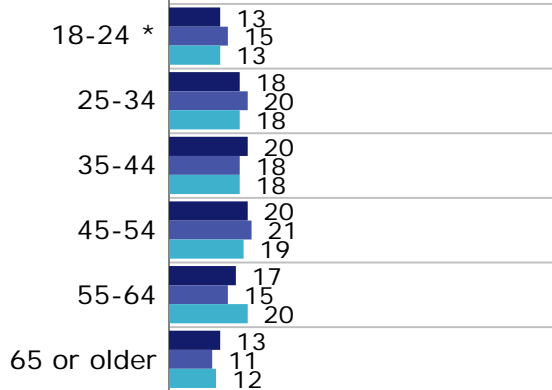
Socio-demographic profile of foreign visitors to Tallinn

% of visitors to Tallinn (excl. cruise), n=1569

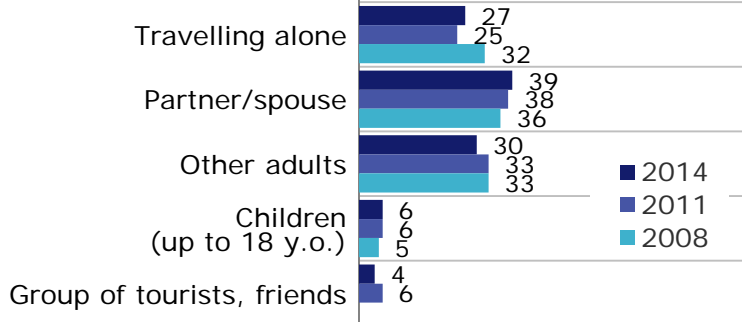
GENDER



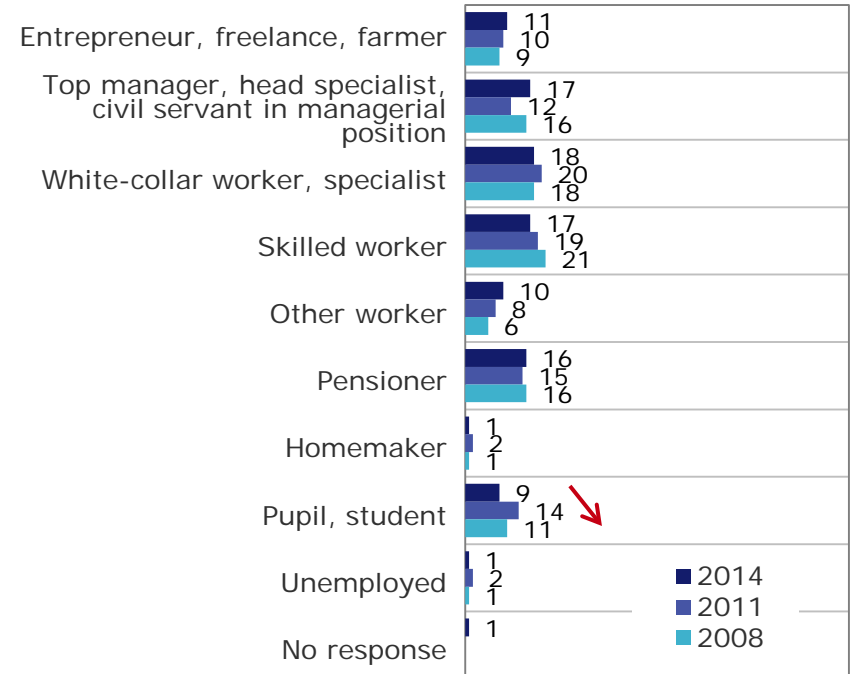
AGE



TRAVEL COMPANION



STATUS



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

4

Purpose of visit and route



Summary of the purpose of the visit and the route

- Compared to 2011, there has been a significant drop in the share of those foreign visitors who spend at least one night away from home (77% in 2014 vs. 88% in 2011).
- For half of the tourists who spent at least one night away from home, Tallinn was the only destination during their trip. But these numbers are on the decline, which means that in addition to the capital of Estonia, they also visit other destinations during their trip. Nevertheless, Tallinn is the only destination more frequently than on the average for foreign tourists from Finland, Sweden, Norway and Latvia.
- Holiday lasting several days is the primary purpose of foreign visitors coming to Tallinn (36%) but for every fourth tourist it is only a one-day vacation. The following purposes are also at the top of the list - business (13%), shopping and using services (11%), and visiting friends and relatives (10%).
- Visitors from United Kingdom (50%) and Germany (50%) describe their trip as a holiday lasting several days more frequently than on the average, the trip is described as a one-day vacation more often than on the average by Finns (34%). Latvians (46%), Norwegians (28%) and Germans (23%) travel to Tallinn on business more frequently than on the average. Finns (17%) and Russians (16%) come to Tallinn for goods and services more often than on the average. Tourists from Latvia (20%), United Kingdom (19%) and Russia (18%) come to Tallinn more frequently to visit friends and relatives.
- For half of those (56%) who travelled to Tallinn on holiday lasting several days, to visit friends/relatives or attend cultural events the trip to Estonia primarily meant a short break. Foreign visitors from Latvia (83%), Finland (69%) and Russia (62%) tend to describe their trip to Tallinn as a short break more frequently than on the average. For one fifth the visit to Tallinn was their main vacation and for one fifth – a secondary vacation. The trip to Tallinn is described as the main vacation more frequently than on the average by tourists from Germany and as the secondary vacation – by visitors from Sweden and Germany.

Tallinn as the destination

Role of Tallinn as the only destination is showing a significant downward trend

% of all visitors, n=1569

% of all visitors who have spent at least one night away from home, n=1335

Are you spending at least one night away from home? n=1569

Spent at least one night away from home



Which of the following best describes the route of your trip? n=1335

TALLINN is the only destination during this trip

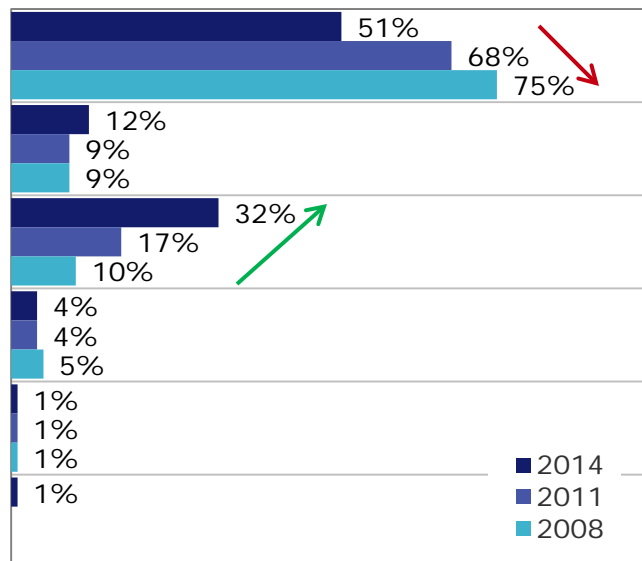
TALLINN is the main but not the only destination

TALLINN is one of many destinations

Visiting TALLINN en route

Other

No response



Purpose of the trip

Day trips play a significant role

% of all visitors, n=1569

Which of the following best describes the purpose of your visit to Tallinn?



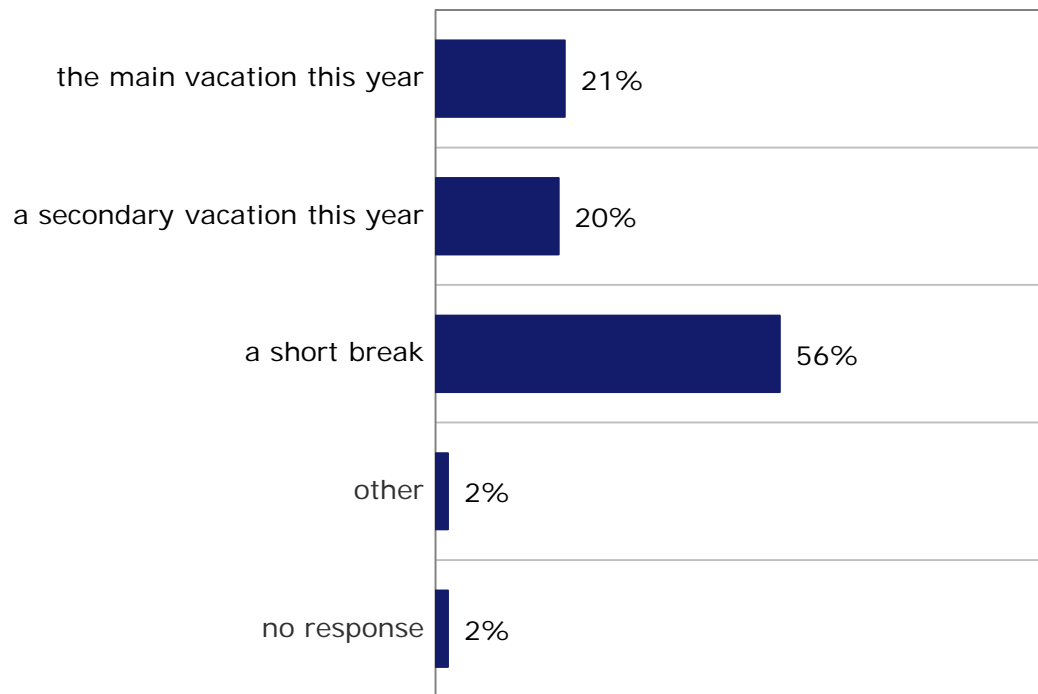
Data not comparable, question has been changed.

Meaning of the holiday trip

The trip to Tallinn tends to be a short break

% of visitors to Tallinn who are on vacation for several days, visit friends and relatives, attend cultural/sporting events, n=809

Would you describe your holiday as ...



Data not comparable, the question has been changed.

5

Spending the night in Tallinn and accommodations



Summary

Spending the night in Tallinn and accommodations

- Three quarters of those spending at least one night away from home, stay overnight in Tallinn and this has remained on more or less the same level during the last three years. Compared to 2008 and 2011, there has been a small increase in the share of foreign visitors spending the night elsewhere in Estonia. Foreign visitors from Russia are the ones who spend the night elsewhere in Estonia more frequently than on the average. Compared to 2011, there has been a certain decrease in spending the night on the ship, train etc. (24%→19%).
- Even though compared to 2011 there has been a significant decrease (2011 - 88%→ 2014 - 77%) in the share of those foreign visitors who spend at least one night in a foreign country, the average trip length has increased among those who prefer staying overnight when travelling (6 nights on average, in 2011 – 5 nights). There has been a certain decrease in the number of nights spent in Tallinn – 2,3 nights on average compared to 3,2 nights in 2008. Probable reason for the decrease is the fact that more visitors also visit other countries. As expected, foreign visitors arriving from further away, from Germany, United Kingdom, Norway and also Russia, stay in town longer. Similarly to 2011, the total of 9-10 nights are spent in other countries.
- At least eight out of 10 foreign visitors stay overnight at a paid accommodation establishment in Tallinn, mostly at hotels and compared to 2008 the share of those staying at hotels has increased 59%→71%. Visitors from Finland (85%) and Norway (78%) stay at hotels more frequently than on the average. 15% stay with friends-relatives and there are more Latvian and Russian visitors among them.
- When looking at booking accommodation in Tallinn, booking via the internet has made a big leap compared to 2008 (24%→46%). In 2014 almost half of the bookings were made online and that primarily instead of reserving accommodation through a travel agency/tour operator. Visitors from Norway (64%) and United Kingdom (59%) prefer booking online more frequently than on the average. Swedes (50%) and Finns (39%) tend to prefer using the services of travel agencies and tour operators more frequently than on the average.

Spending the night away from home (1)

Number of nights spent elsewhere in Estonia is on the increase

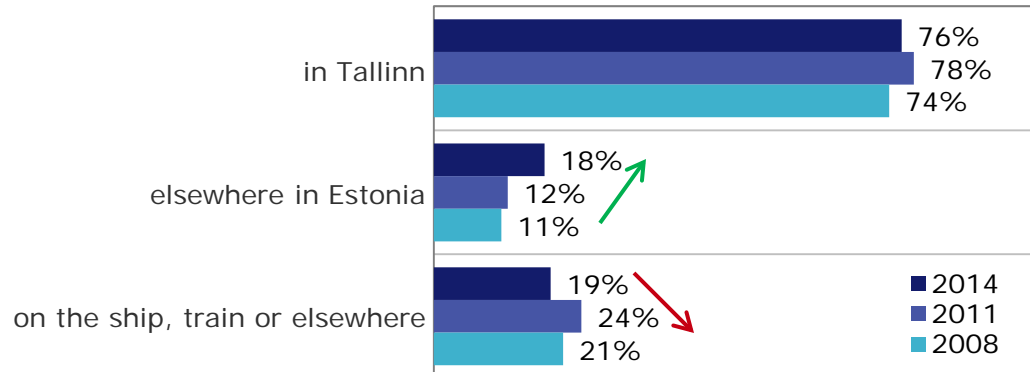
% of all visitors to Tallinn, n=1569

% of all visitors to Tallinn who have spent at least one night away from home, n=1335

Are you spending at least one night away from home? n=1569



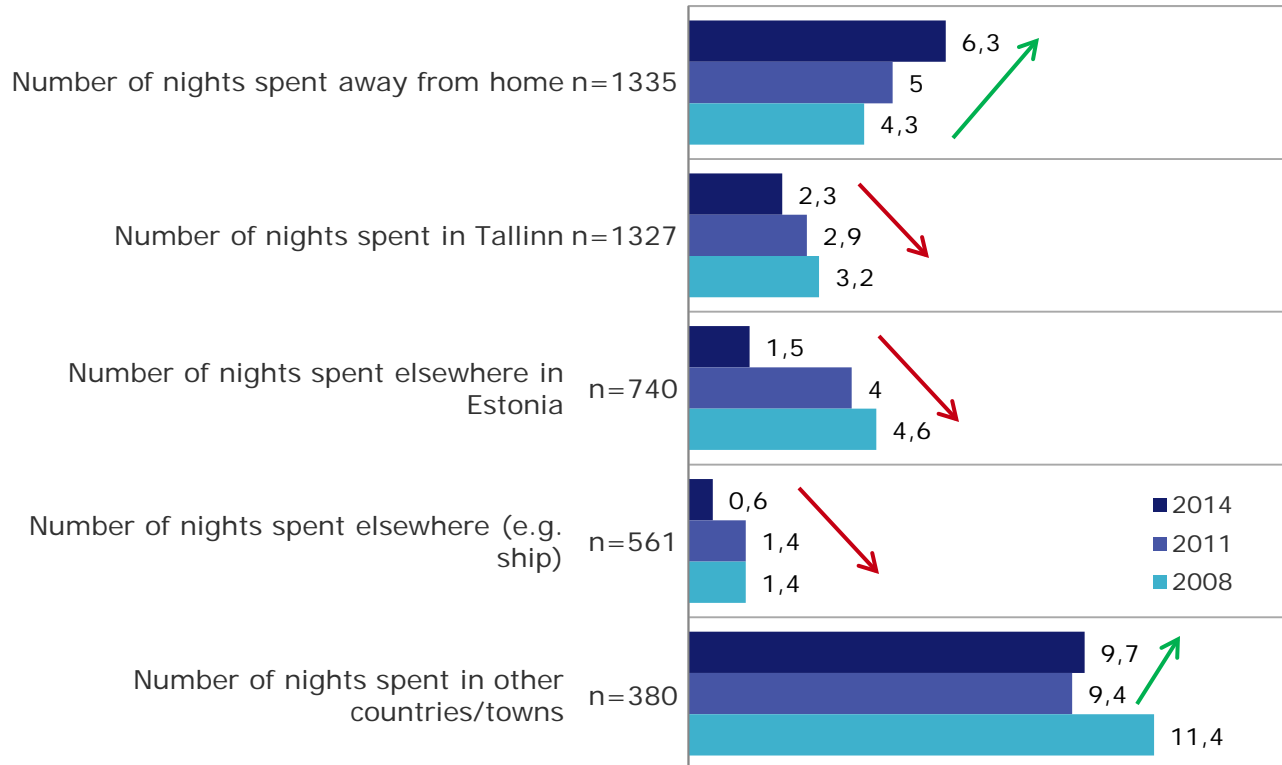
How many of those nights did you spend ...? n=1335
% of all visitors who have spent at least one night away from home



Spending the night away from home (2)

The average length of the trip has increased

Average number of nights spent away from home among those who spent the night at the place shown

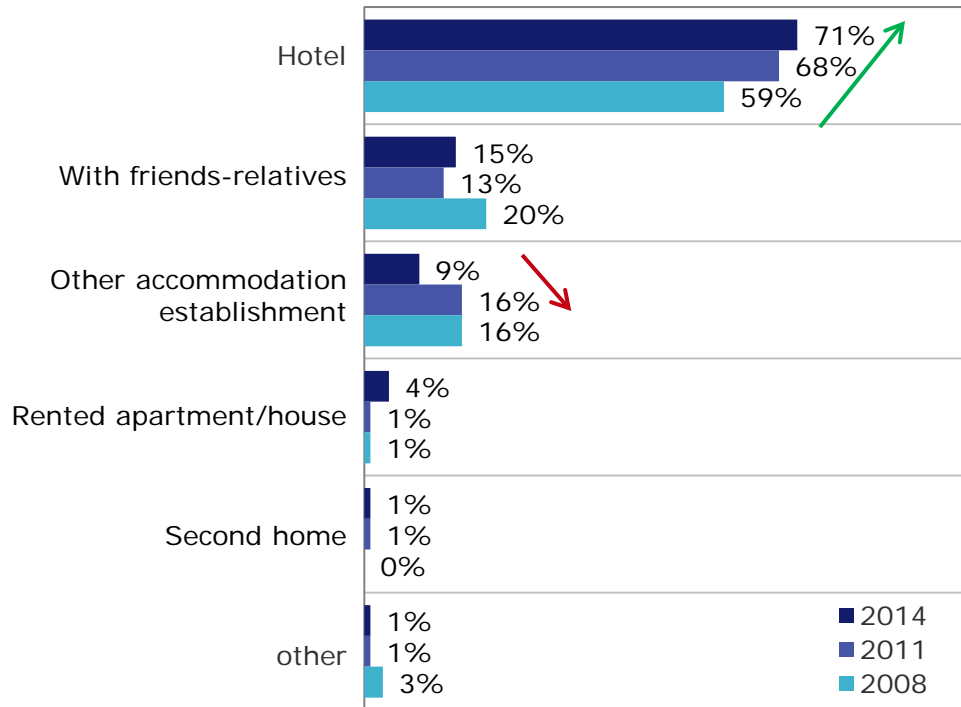


Spending the night in Tallinn

Eight out of ten foreign visitors stay at a paid accommodation establishment

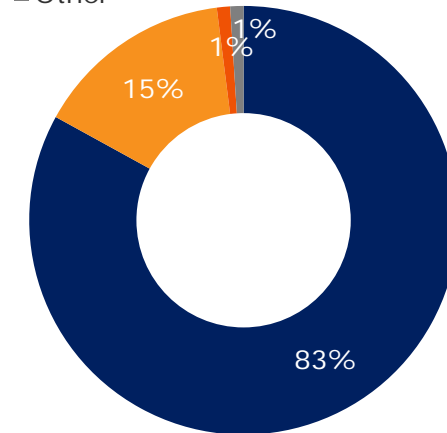
% of visitors to Tallinn who spent at least one night in Tallinn, n=1077

Where did you spend the night in Tallinn



The share of those using free and paid accommodation among foreign tourists who spent the night in Tallinn, 2014

- Accommodation establishment or rented apartment/house
- Friends/relatives
- Second home
- Other

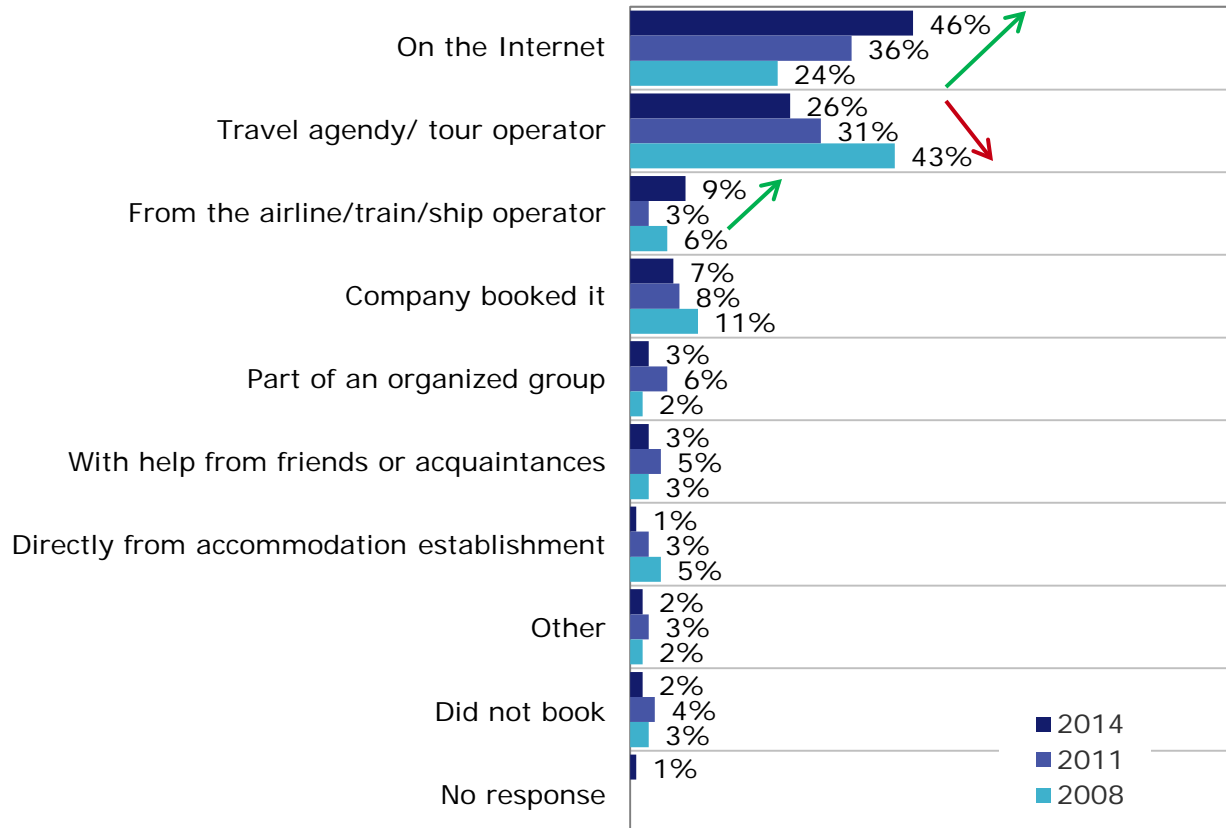


Booking accommodation

Almost half of the bookings are made on the internet

% of visitors to Tallinn who spent at least one night at an accommodation establishment in Tallinn, n=886

How did you book your accommodation in Tallinn?



6

Planning the trip to Tallinn



Summary (1)

Planning the trip to Tallinn

- Seven out of ten foreign visitors make the decision to travel to Tallinn within a month before arrival. Visitors from neighboring countries like Finland, Russia and Latvia make spontaneous travel decisions more frequently, deciding to travel to Tallinn less than a week before arrival. Tourists from United Kingdom and Germany plan their trip more than 9 weeks ahead of time more frequently than on the average.
- Regarding sources of information about Tallinn, we looked at the share of users of various sources among foreign visitors as well as their evaluations of the source's impact on making the decision to travel to Tallinn. The question was changed slightly compared to previous surveys and therefore it is not possible to compare the results to previous periods.
- For more than half of the foreign visitors to Tallinn (57%) the most important source of information is their previous visit to Tallinn, recommendations by friends/acquaintances was mentioned second (43%). These two sources also had the biggest influence on making the travel decision. One fifth look at different travel portals and travel forums on the internet (e.g. TripAdvisor etc.) and one fifth visit other home pages about Tallinn.
- As expected, previous visit to Tallinn is an important source of information for foreign visitors from Finland and Latvia. Recommendations by friends and acquaintances are important to Brits, receiving the information when dealing with work matters is common in case of Germans and Latvians.
- There were separate questions for those not travelling on business, asking how much was the travel decision influenced by events (cultural, sporting) taking place in Tallinn, promotional campaigns introducing Tallinn and discounted offers/ favorable price of the trip. As expected, 43% of the visitors admitted that favorable price had an influence on their decision to travel to Tallinn. Discounted offers had a somewhat more significant influence on Finns and Swedes. 13% visited Tallinn because of interesting events (direct influence + some influence). Promotional campaigns about Tallinn had an influence on only 11% (major impact + some impact).

Summary (2)

Planning the trip to Tallinn

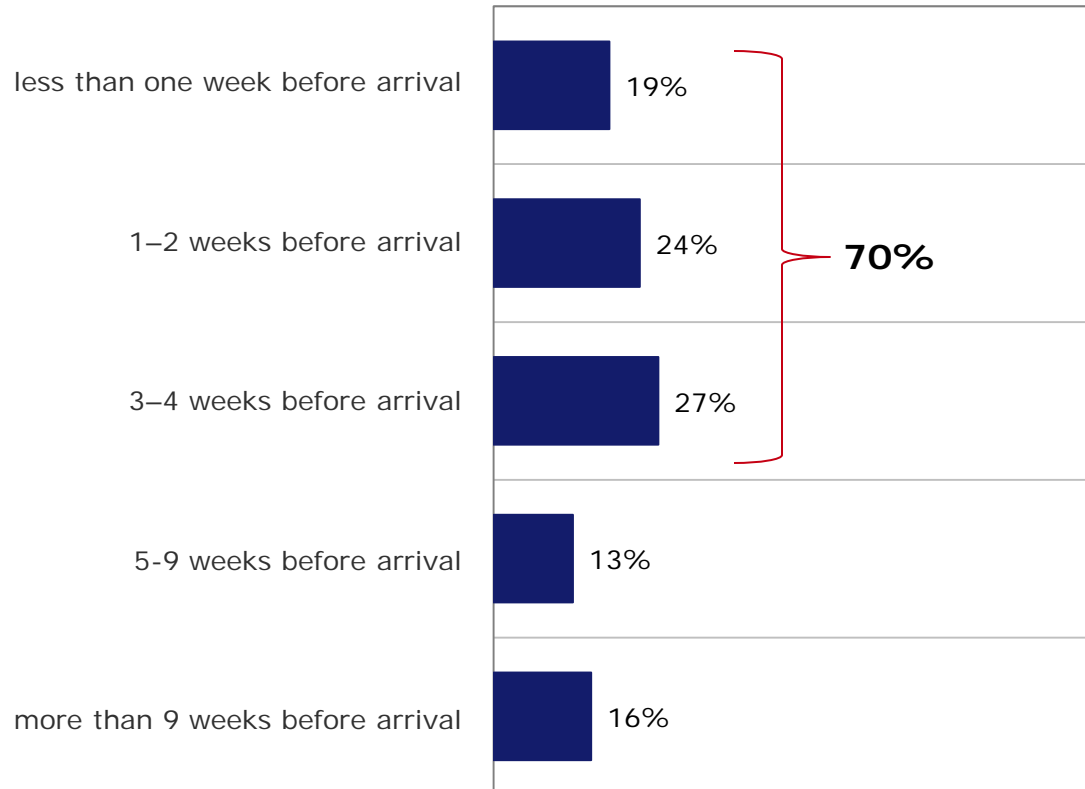
- Similarly to previous periods, the most important mode of transportation for arriving in Tallinn is a ship or ferry, six out of ten foreign visitors prefer that when travelling to Tallinn. One fifth arrive by plane and 13% by bus. Compared to 2008, the share of trains has decreased significantly.
- As expected, arriving in Tallinn by ship or ferry is more common among Finns and Swedes. Arriving by plane is more popular among tourists who come from further away - Norwegians, Brits and Germans. Visitors from Russia and Latvia arrive in Tallinn by bus more frequently than on the average. There are more Russians among those travelling by car and train.

The decision to travel to Tallinn

Seven out of ten foreign visitors make the decision within a month before arrival

% of visitors to Tallinn, n=1569

When did you make the decision to travel to Tallinn? Was it ...



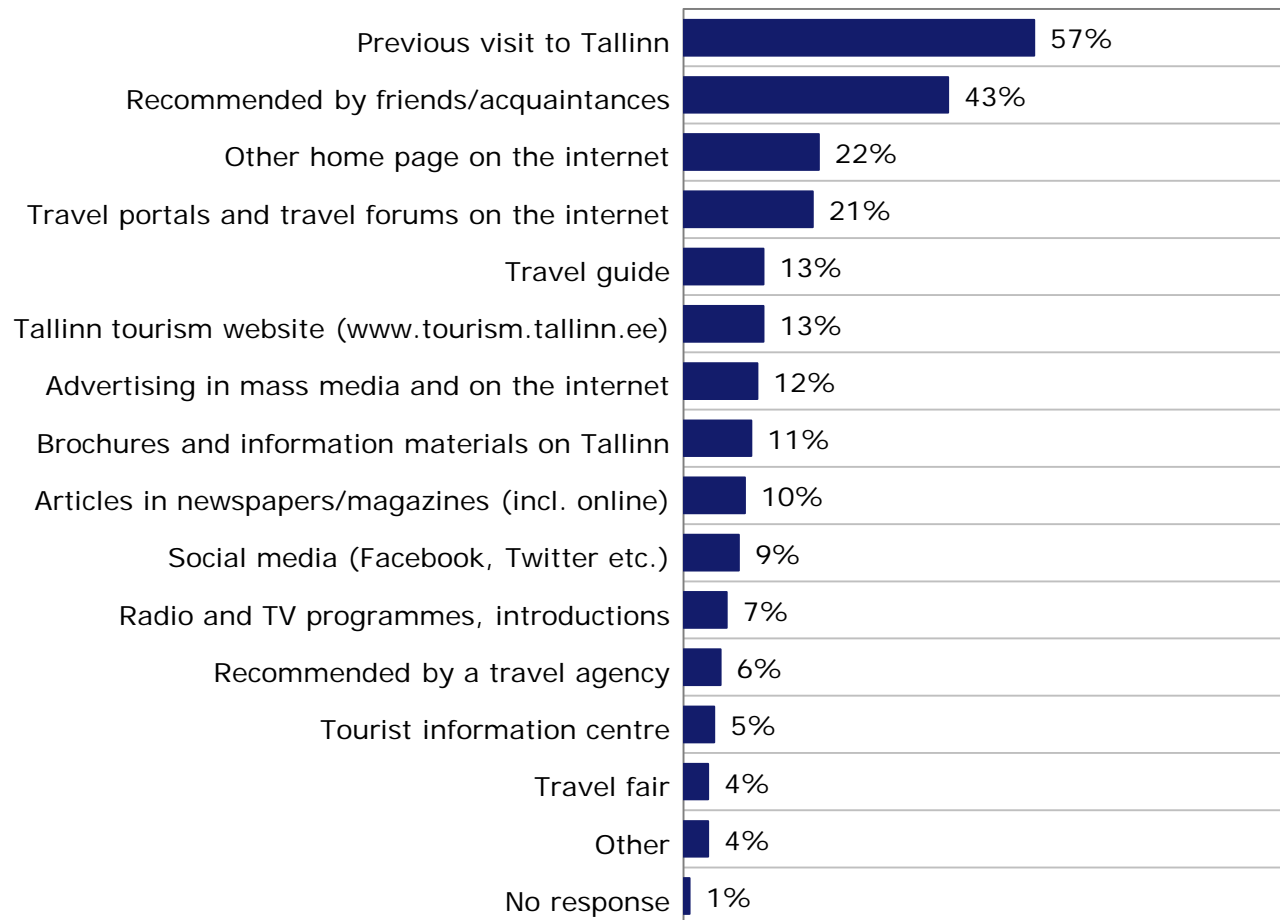
Data not comparable, question has been changed.

Sources of information about Tallinn before the trip

Best source of information before the trip is previous visit

% of visitors to Tallinn, n=1569

Which of the following sources provided you with information about Tallinn prior to the visit?

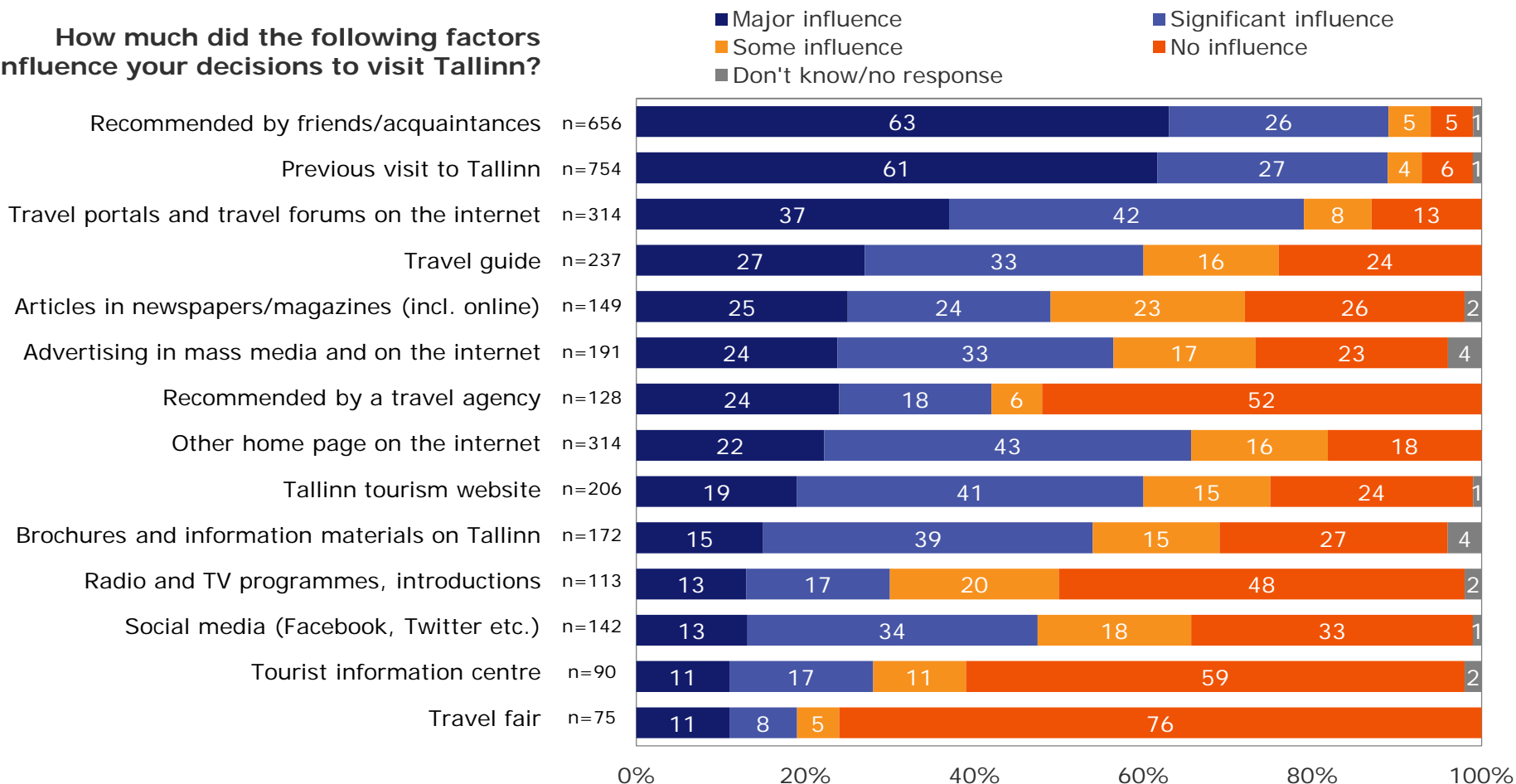


Data not comparable, question added in 2014

Influence from sources of information

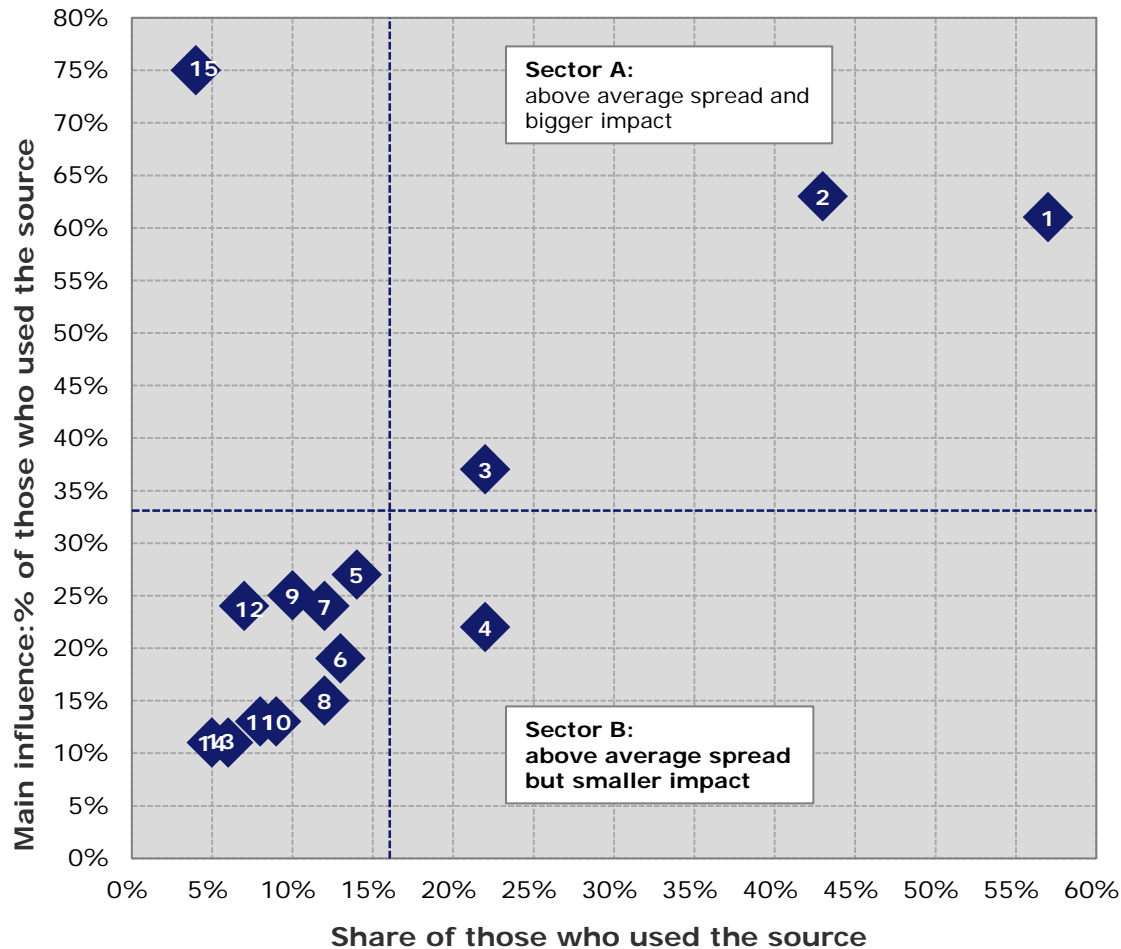
Friends'/acquaintances' recommendations and previous visit have the biggest influence on travelling to Tallinn

How much did the following factors influence your decisions to visit Tallinn?



Overview – use of sources of information and their influence

Most common sources of information with biggest influence are previous visit and friends'-acquaintances' recommendations

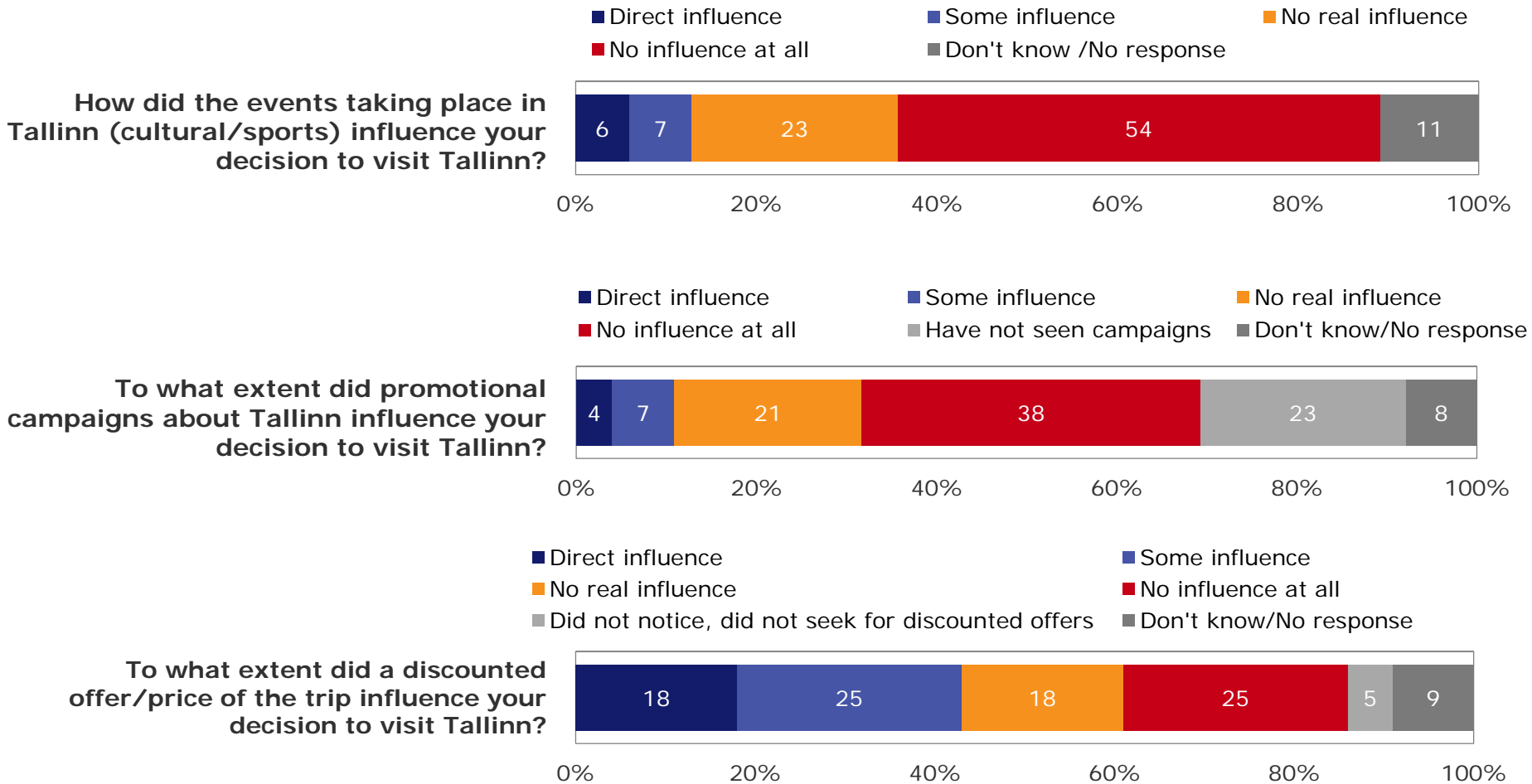


- 1 Previous visit to Tallinn
- 2 Recommended by friends/acquaintances
- 3 Travel portals and travel forums on the internet
- 4 Other home page on the internet
- 5 Travel guide
- 6 Tallinn tourism website (www.tourism.tallinn.ee)
- 7 Advertising in mass media and on the internet
- 8 Brochures and information materials on Tallinn
- 9 Articles in newspapers/magazines (incl. online)
- 10 Social media (Facebook, Twitter etc.)
- 11 Radio and TV programmes, introductions
- 12 Recommended by a travel agency
- 13 Tourist information centre
- 14 Travel fair
- 15 Other

Factors influencing the decision to travel to Tallinn

Discounted travel offers/price of the trip may have a big impact on the decision to travel to Tallinn

% of visitors to Tallinn not on a business trip, n=1288

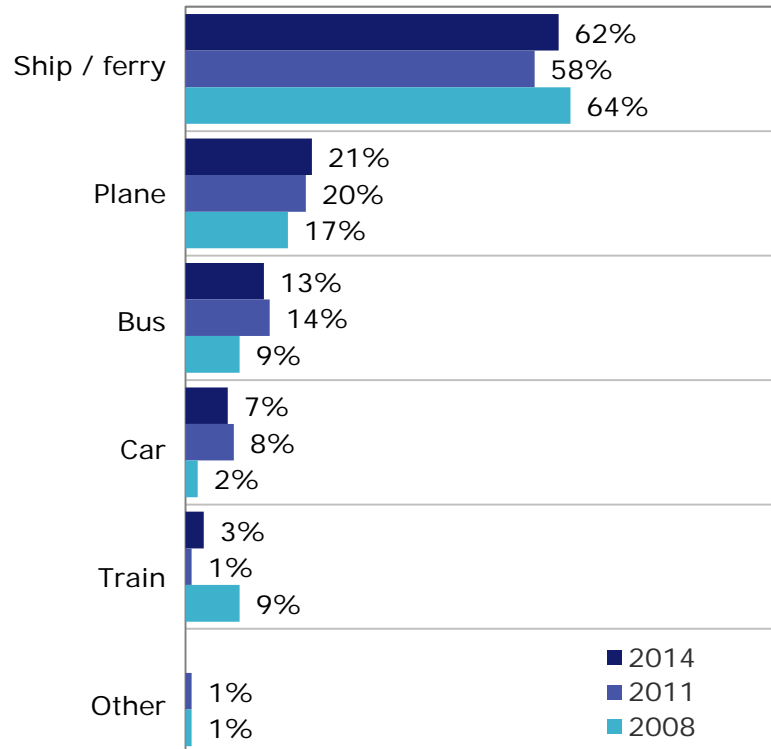


Transport used to arrive in Tallinn

The majority of foreign visitors continue to arrive in Tallinn by ship or ferry

% of visitors to Tallinn, n=1569

Which mode of transportation did you use to arrive in Tallinn?



7

Visit to Tallinn and general impression



Summary (1)

Visit to Tallinn and general impression

- Compared to 2008 there has been a significant increase in the share of those foreign visitors who arrive in Tallinn for the first time (14% in 2008, 20% in 2011 and 23% in 2014). There are more foreign visitors who visit Tallinn for the first time among those travelling from more distant countries like Norway, United Kingdom, Germany and other countries (that are not the top target markets for Tallinn at the moment). Those who visit Tallinn repeatedly are, compared to the average, more frequently from nearby countries like Finland, Sweden and Latvia.
- On average, the visitor to Tallinn has been in Tallinn 17 times but here the high number of average visits by Finnish visitors has a big impact, their average being 22 times.
- During their trip to Tallinn visitors receive the most information from people they know, friends-acquaintances (36%). The number of Russian tourists visiting relatives in Estonia was above average and it is to be expected that they receive the main information needed during their visit to Tallinn from them (46%). In terms of sources of information, the staff at the hotel, accommodation establishment were also important (21%). They are used more than on the average by visitors from United Kingdom. Information materials on Tallinn (17%) are important sources of information but there were no statistical differences from the average in case of countries of origin included in the survey. Local people (15%), home pages on the internet (13%) and travel guides (12%) were also mentioned somewhat more frequently among sources of information used during the stay.
- One third of foreign visitors who use social media (Facebook, Twitter, blogs etc.) share their travel experiences online during the stay and 44% plan on doing that after the visit. Norwegians and Brits share their experiences during the trip more than on the average and plan to do so after the trip – Brits.
- Compared to previous years, the visitors to Tallinn have begun walking around the city significantly more (67% in 2008 vs. 79% in 2014). Visitors from Finland, Norway, United Kingdom and Germany get around on foot more frequently than on the average. The share of those using taxis has remained stable since 2008 (36%-37%). Norwegians, Brits and Swedes use taxis to get around more than on the average. Compared to six years ago, there has been a significant increase in the share of foreign visitors who use cars to get around in the city (2008 - 13%→20%). Tourists from Russia and Latvia use cars more than on the average. During the last three years there has been a certain drop in the relative importance of public transport (19%→24%) but it is still a significant mode of transport among Brits, Germans and Latvians.
- As expected, a large share of foreign visitors visit the Old Town (81%) and downtown (78%) during their stay in Tallinn and this share has remained rather stable during the last six years. One fifth find the time to visit Kadriorg – Brits doing it more than on the average. Compared to 2011, there has been a decrease in visits to Rocca al Mare (19%→13%), this is visited more frequently by Russians. Kalamaja (12%) and Tallinn's surroundings (11%) are visited more than before.

Summary (2)

Visit to Tallinn and general impression

- Similarly to previous periods, the top three activities for foreign visitors to Tallinn are going to cafes/restaurants, shopping and sightseeing. Unlike previous periods, in 2014 the relative importance of shopping (79%→70%) and sightseeing (53%→46%) decreased considerably.
 - Germans and Latvians go to cafes and restaurants more than on the average, Finns shop more than on the average and Brits and Germans go sightseeing more frequently than on the average.
 - Brits and Germans go to pubs and nightclubs more often than on the average.
 - Norwegians, Swedes, Germans and Latvians deal more with work matters.
 - Finns and Swedes are more active in going to beauty salons and Swedes and Norwegians – going to spas/health centers.
 - Germans visit cultural events more often.
- General impression of the trip to Tallinn received higher evaluations - while in 2008 19% of all foreign visitors gave 10 points to the general impression of the trip to Tallinn, in 2014, 30% of tourists gave Tallinn the highest score. Average score given to the general impression of the trip to Tallinn has increased from 8,5 points in 2008 to 8,8 points in 2014.
- According to the majority (67%), the trip to Tallinn met their expectations and according to every fourth visitor, it exceeded or greatly exceeded expectations. Tallinn exceeded expectations the most in case of Swedes, Brits and Germans. Since Finns are our close neighbors and frequent visitors to Tallinn, the number of those among them who say the trip to Tallinn met their expectations, is the highest.
- Evaluations of Tallinn's image components have improved slightly year after year, compared to 2008 the score given to the statement "the town is clean and tidy" has improved somewhat more compared to other statements (3,4 → 3,7).
- The customer service rating has also improved somewhat. Compared to 2008, there has been a slight improvement in scores given to the professionalism of customer service personnel (3,4 → 3,7) and to their foreign language skills (3,3 → 3,6).

Summary (3)

Visit to Tallinn and general impression

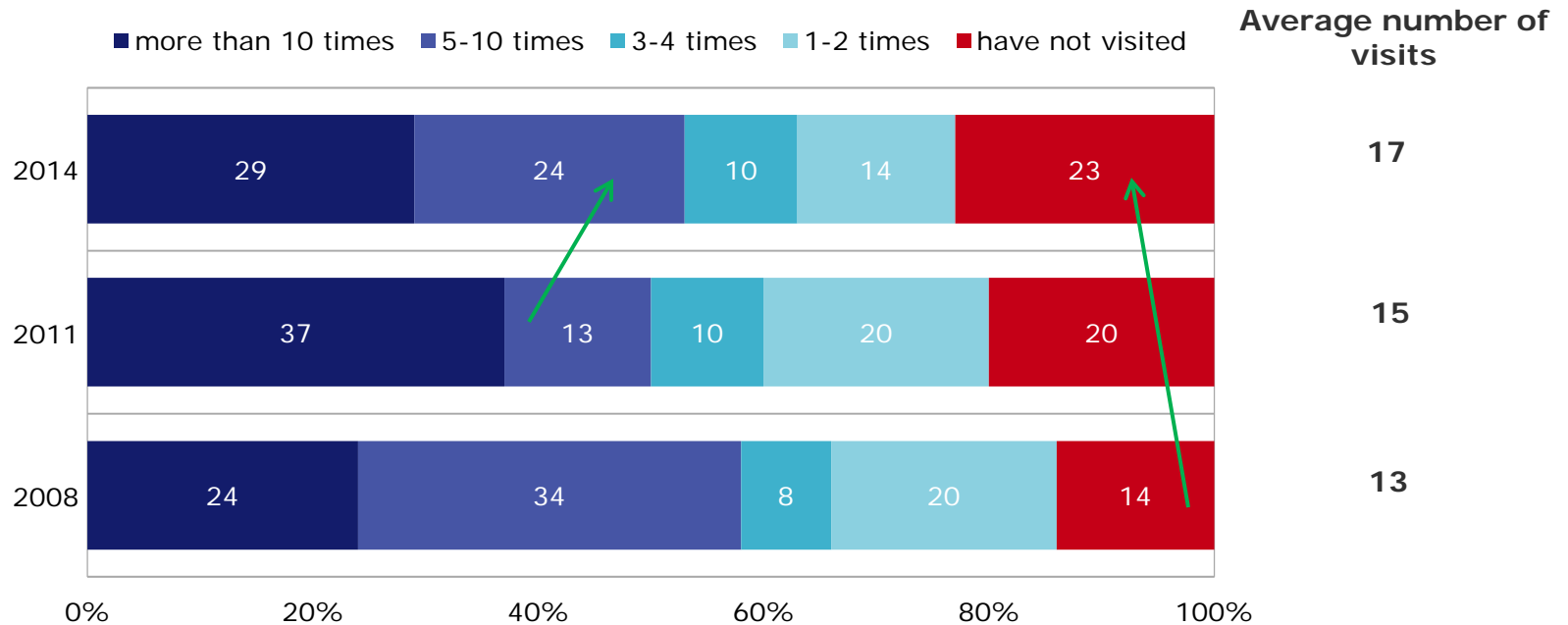
- Nine out of ten foreign visitors believe that they will visit Tallinn again during the next 5 years. Compared to 2011, there has been a small increase in the share of those visitors who are certain of their future visit (62%→69%).
 - There are more visitors from more distant countries, like Germany and other countries grouped together, who said that they are not very likely to or will definitely not visit Tallinn again during the next 5 years.
 - Finns and Latvians (very likely) and Russians (quite likely) were more certain of their future visit than on the average.
- Even though there haven't been any great changes in recommendation communication during the last six years, almost all respondents would recommend Tallinn to their friends and acquaintances and the positive aspect is that during the last three years there has been an increase in the share of visitors who are very likely to recommend Tallinn (72% - 2011 → 79% - 2014).
 - Finns are more often very likely to recommend, Swedes, Norwegians and Germans are more often quite likely to recommend visiting Tallinn.
- One third of foreign visitors know or have heard about Tallinn Card but only one fourth of them have used it. Latvians and Swedes have used Tallinn Card more than on the average.
- In 2014, foreign visitors' total spending (incl. accommodation) per person a day was 127 EURO, which is 37 EURO less than three years ago. Even though total spending has decreased among foreign visitors from all countries included in the survey, the biggest decrease has taken place among visitors from Russia. While in 2011 a tourist from Russia spent 384 EURO on average, in 2014 the average spending was 270€. Consumers' insecurity, caused by the weakening of the ruble, is most likely the deeper reason behind the decrease in spending. At the same time, there has also been a certain decrease in spending on accommodation, which also influences total spending.
 - Since shopping as an activity has decreased significantly compared to 2011, it is to be expected that daily spending on shopping per person has decreased considerably (111€ in 2011 and 51€ in 2014). Here visitors from Russia have a big impact, spending on average 205€ less on shopping in 2014.
- It is estimated that foreign visitors to Tallinn (without cruise passengers) spent 877 – 951 million EURO in Tallinn in 2014 and cruise passengers – 14–18 million EURO, which is significantly more than in 2011.

Previous visit to Tallinn

The share of repeat visitors as well as first-time visitors is increasing

% of all visitors to Tallinn who were able to answer, n=1487

How many times have you visited Tallinn before this trip?



Factors that influenced the decision-making to travel to Tallinn

The answers of visitors who were in Tallinn for the first time

The answers of those who were in Tallinn for the first time, n=461

In the following section the open ended answers to the following question are presented:

Why did you choose Tallinn as your destination?

The following factors were mentioned the most:

New destination, wanted to visit Tallinn, Estonia, the Baltic States (mentioned 117 times)

Work related trip (mentioned 73 times)

Somebody recommended: a friend, spouse (mentioned 54 times)

Interesting city, I'm interested in the city, country (mentioned 51 times)

Old town, historical city (mentioned 35 times)

To visit friends, relatives, acquaintances (mentioned 33 times)

Excursion (mentioned 22 times)

Beautiful city (mentioned 22 times)

Nearby, good destination to visit among others, day trip (mentioned 21 times)

Didn't choose myself, the trip was as a gift, a friend invited to come along (mentioned 12 times)

Good offer, cheap flight (mentioned 10 times)

Sporting events, sports (mentioned 4 times)

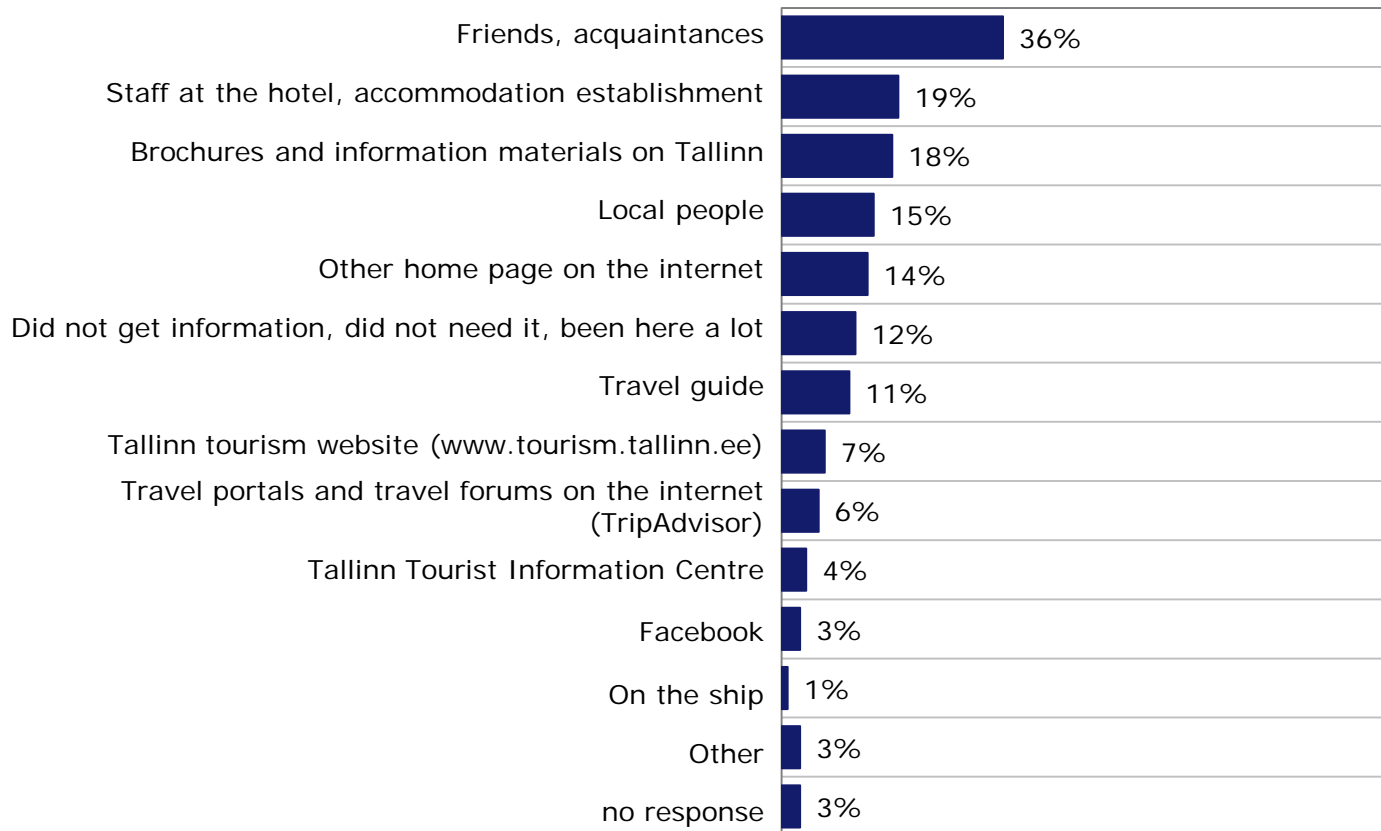
European city (mentioned 4 times)

Sources of information about Tallinn during the trip

In discovering the town, friends-acquaintances are the main sources of information, accommodation establishment's staff has an important role

% of visitors to Tallinn, n=1569

Which of the following sources did you use to find information during your stay in Tallinn?



„Other“ covered the following sources:

- Travel agency
- Sadama market
- Bus station information desk

Data is not comparable, the question was added in 2014.

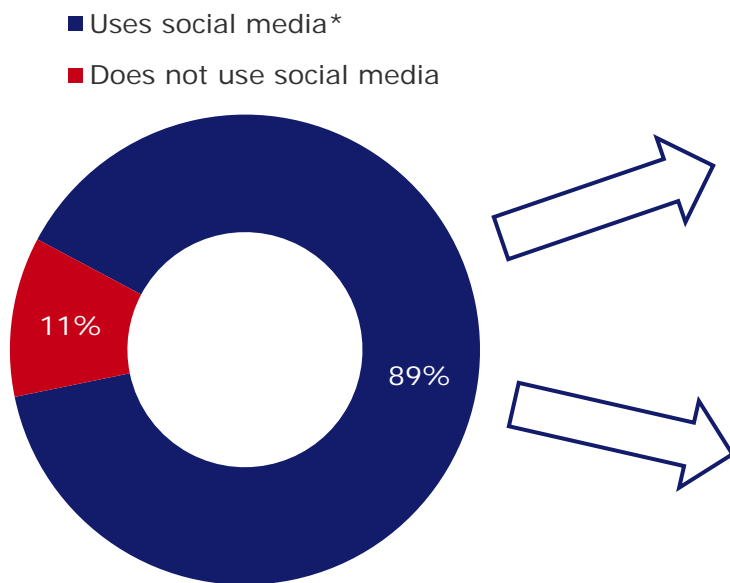
Sharing travel experiences on social media

One third shares their experiences during the visit

% of all visitors belonging to the target group

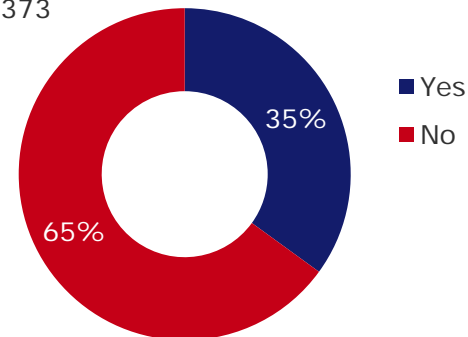
% of those using social media

Use of social media (Facebook, Twitter, blogs) n=1569

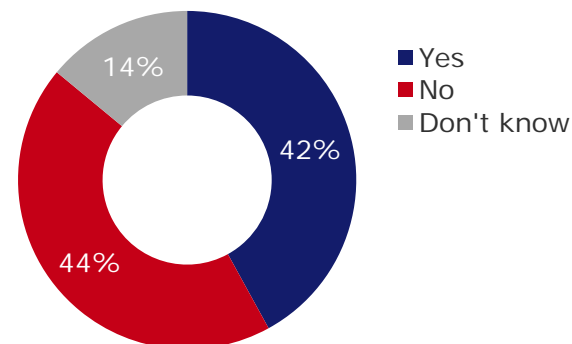


Did you share travel experiences on social media during your stay in Tallinn (Facebook, Twitter, blog)?

n=1373



Do you plan to share your travel experiences on social media AFTER visiting Tallinn (Facebook, Twitter, blog)?** n=555



* "Uses social media" includes foreign visitors who responded as follows to the question below: a) Yes b) No d) Don't know and did not pick the option c) Don't use social media.

Did you share your travel experiences in social media during your stay (Facebook, Twitter, blog)?

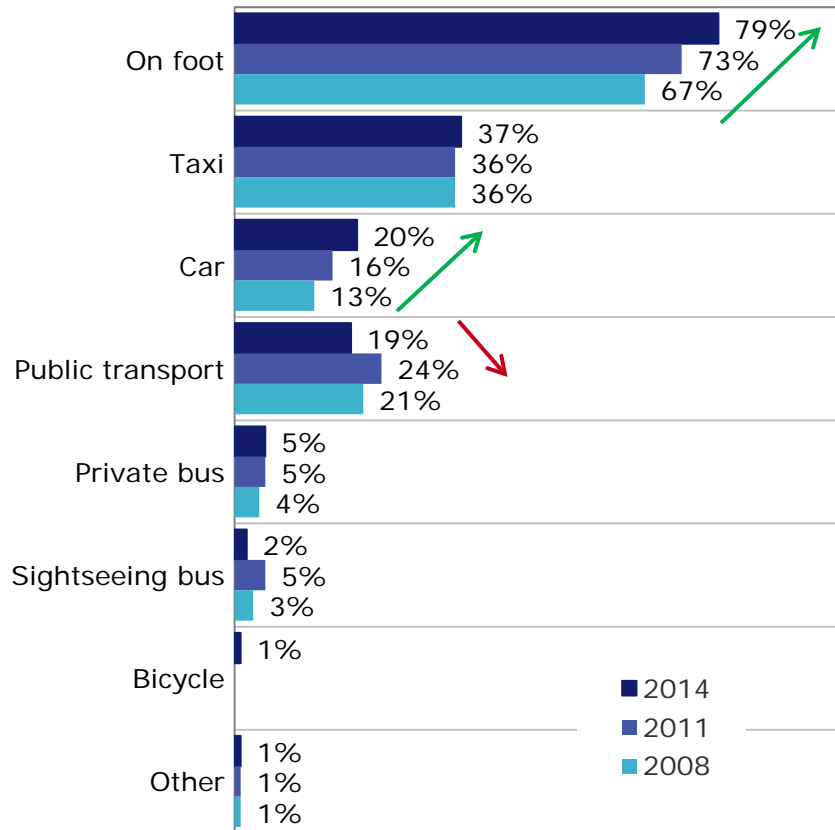
* This question was added in July.

Transport used in Tallinn

Getting around on foot is on the increase, public transport on the decrease

% of visitors to Tallinn, n=1569

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

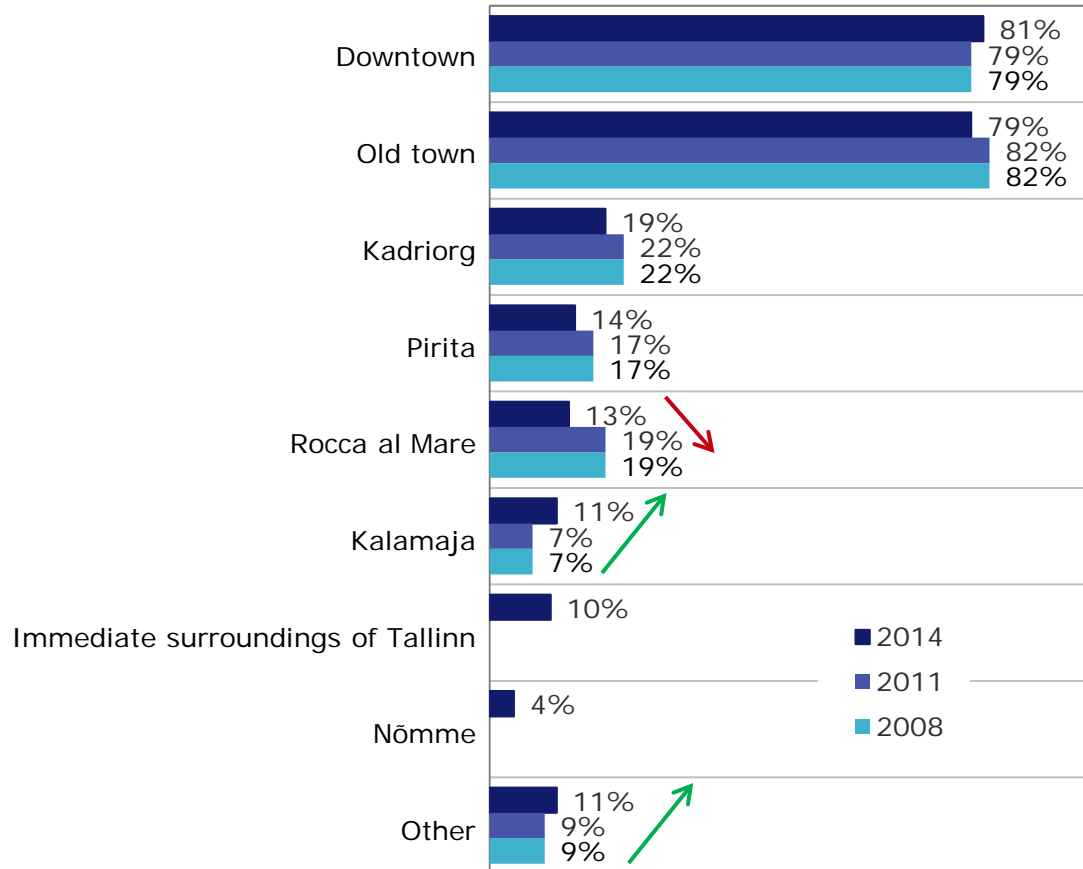


Areas visited in Tallinn

In addition to old town and downtown, Kalamaja and Tallinn's immediate surroundings are gaining popularity

% of visitors to Tallinn, n=1569

Which areas of Tallinn did you visit during your trip?



„Other“ included mainly the following:

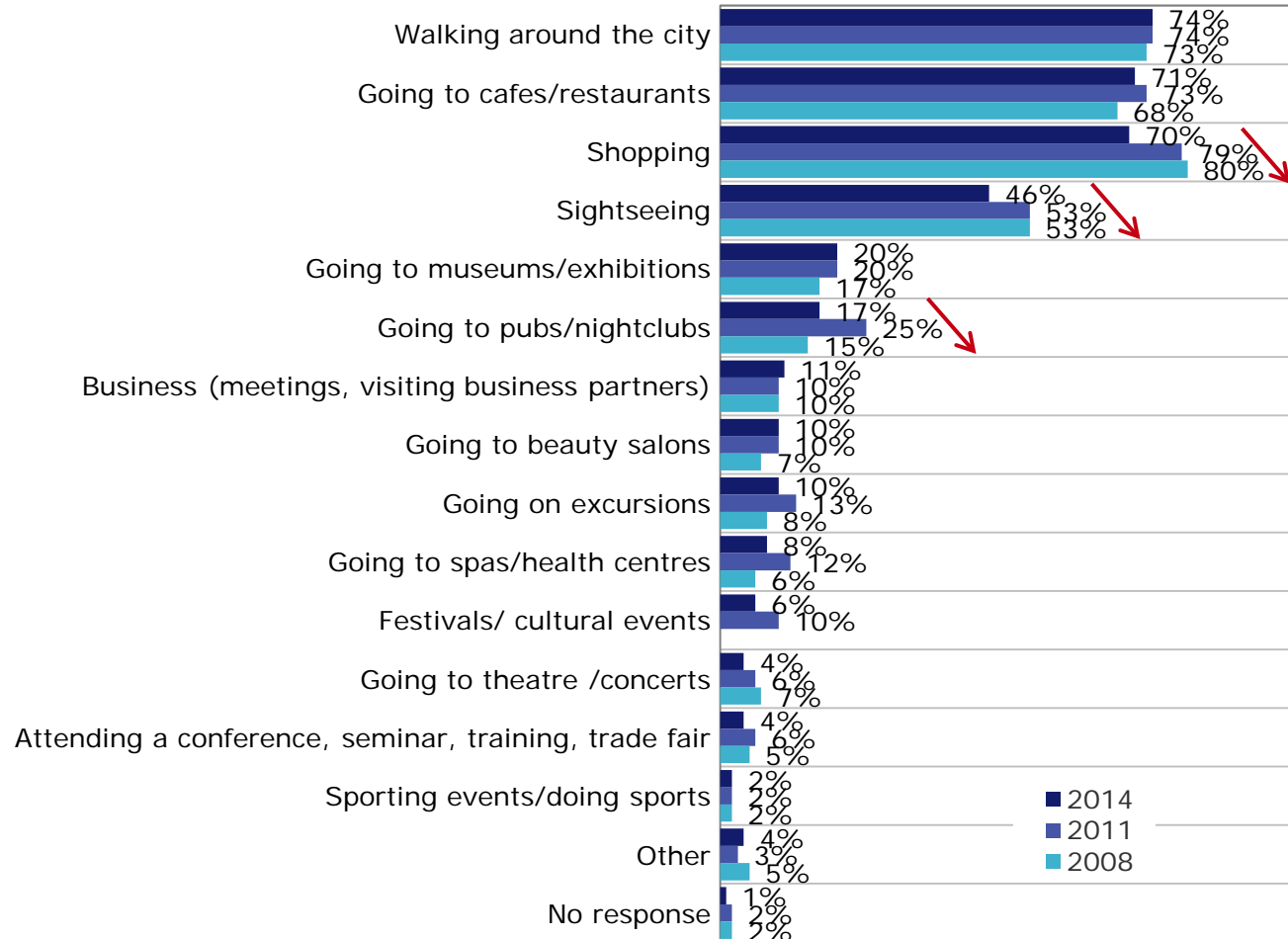
- Lasnamäe
- Mustamäe
- Kristiine, Kristiine shopping centre
- Ülemiste, Ülemiste shopping centre
- Port area, Norde Centrum
- Linnahall
- Stroomi

Activities in Tallinn

Shopping has decreased

% of all visitors to Tallinn, n=1569

Which of the following activities did you do in Tallinn?



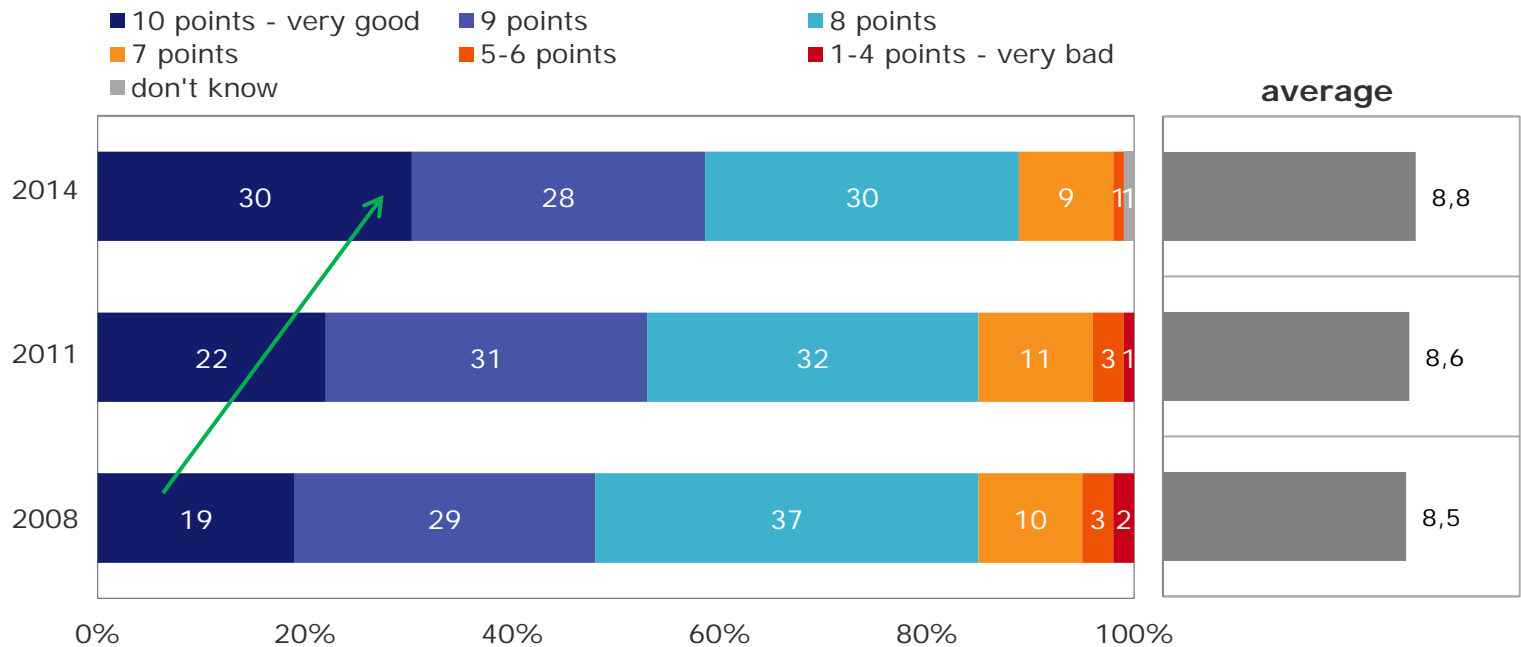
Average foreign visitor carries out 3-4 activities during their visit to Tallinn.

Overall impression of the trip to Tallinn

General impression of the trip to Tallinn is increasingly positive

% of all visitors to Tallinn, n=1569

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?

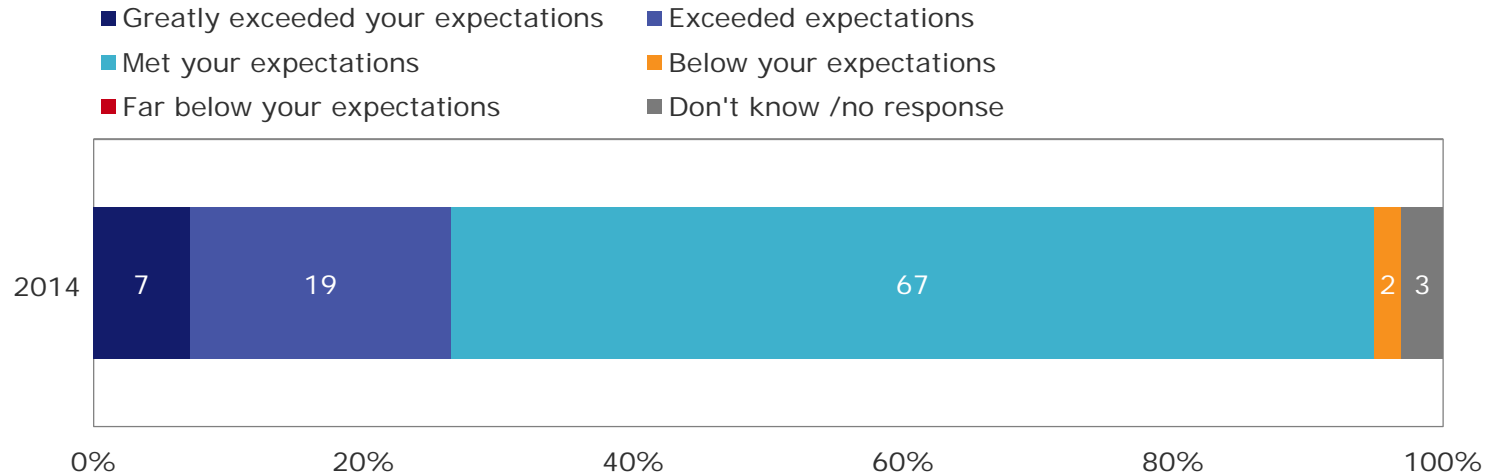


Trip to Tallinn meeting expectations

The trip to Tallinn exceeded expectations for every fourth visitor

% of visitors to Tallinn, n=1569

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



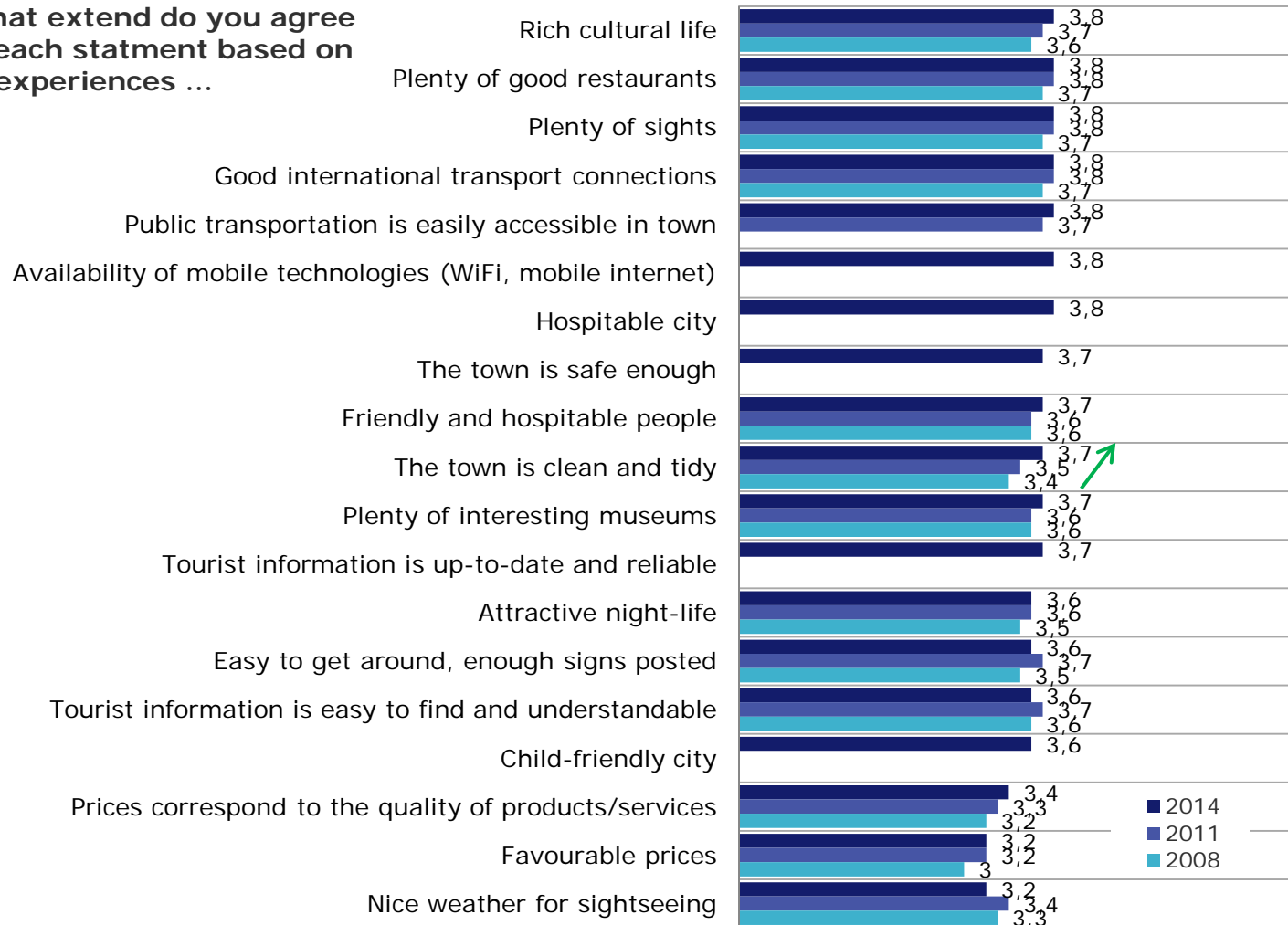
Data is not comparable, the question was added in 2014.

Image of Tallinn

Evaluations of the city are improving

average evaluations on a 4-point-scale where 1 is minimum and 4 – maximum value

To what extent do you agree with each statment based on your experiences ...



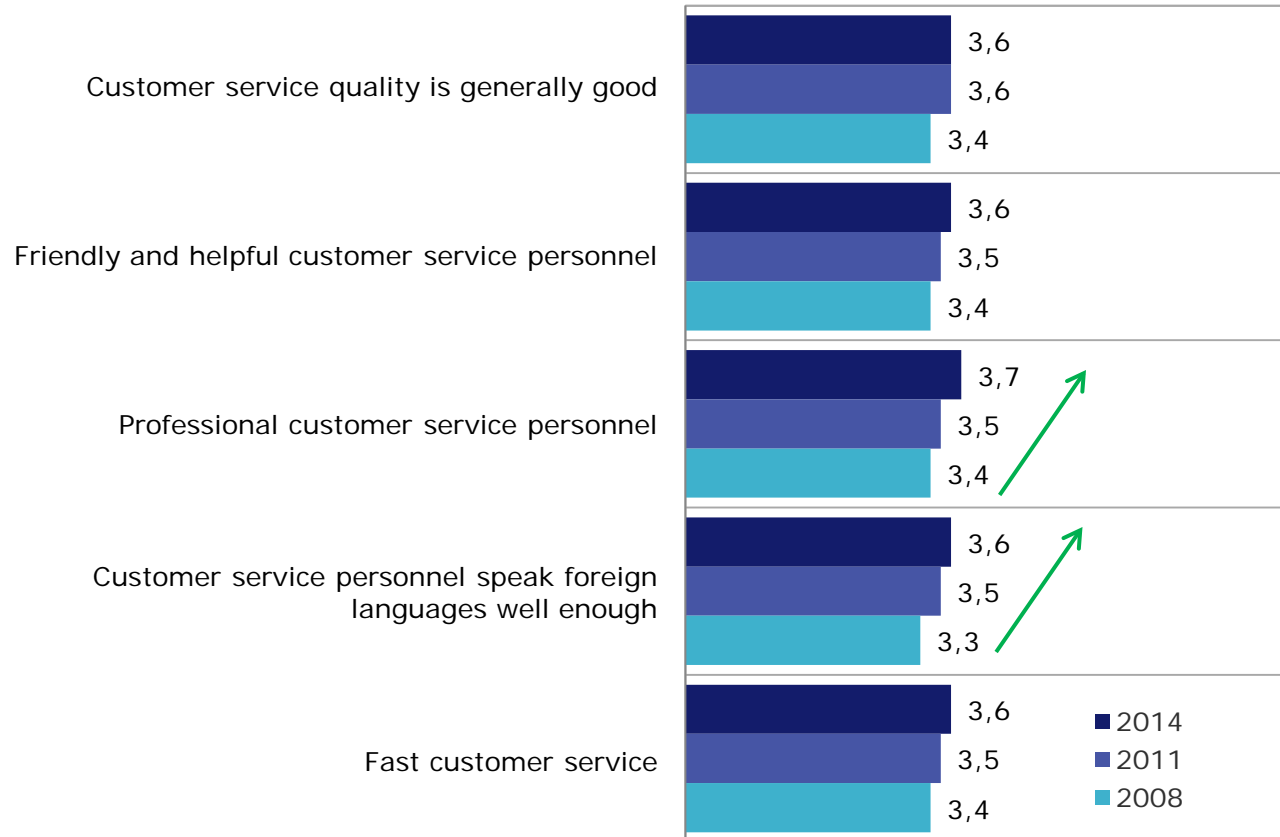
Some statements were added in 2014

Customer service in Tallinn

Evaluations of customer service are improving

average evaluations on a 4-point-scale where 1 is minimum and 4 – maximum value

To what extent do you agree with the following statements about customer service in Tallinn?

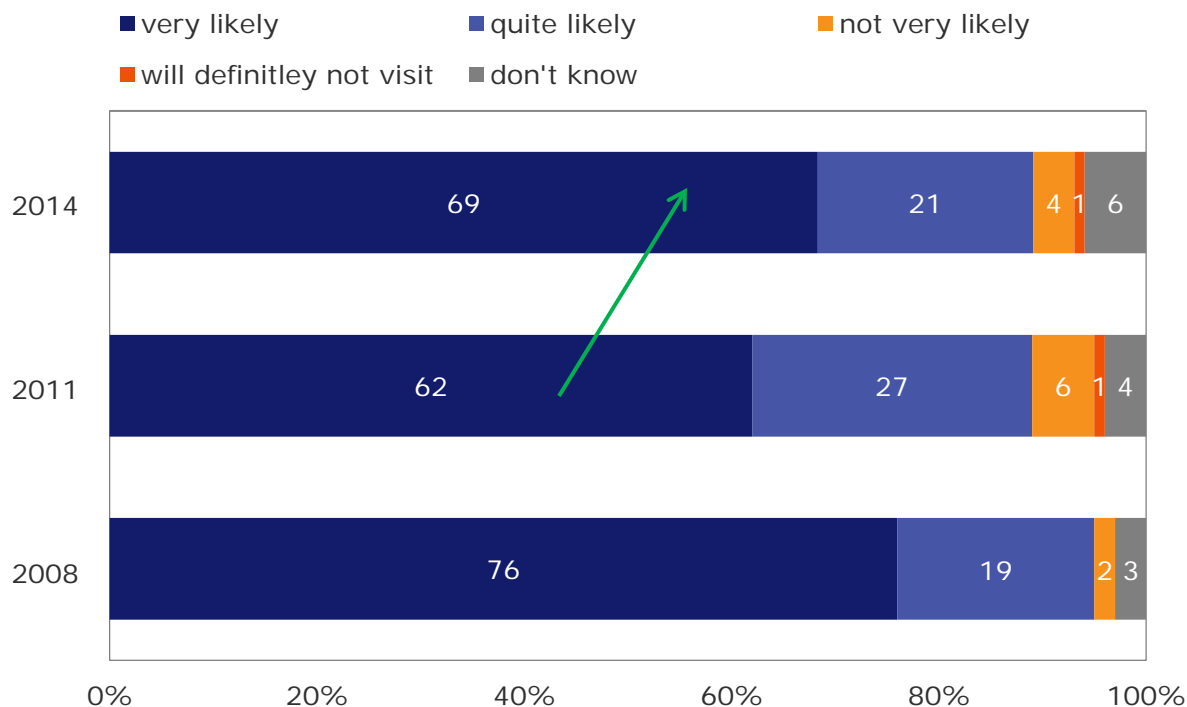


Likelihood of visiting Tallinn again

Nine out of ten foreign visitors believe that they will visit Tallinn again during the next five years

% of visitors to Tallinn, n=1569

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

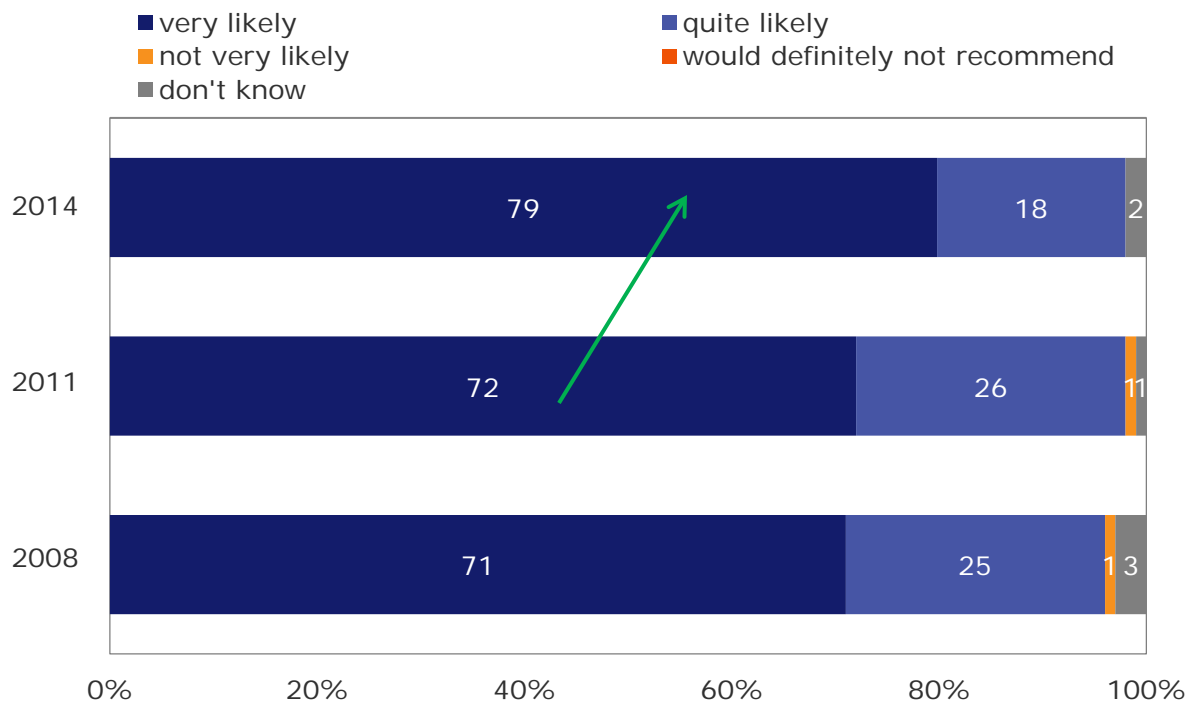


Recommendation communication

The share of foreign visitors who would definitely recommend Tallinn as a destination has increased

% of visitors to Tallinn, n=1569

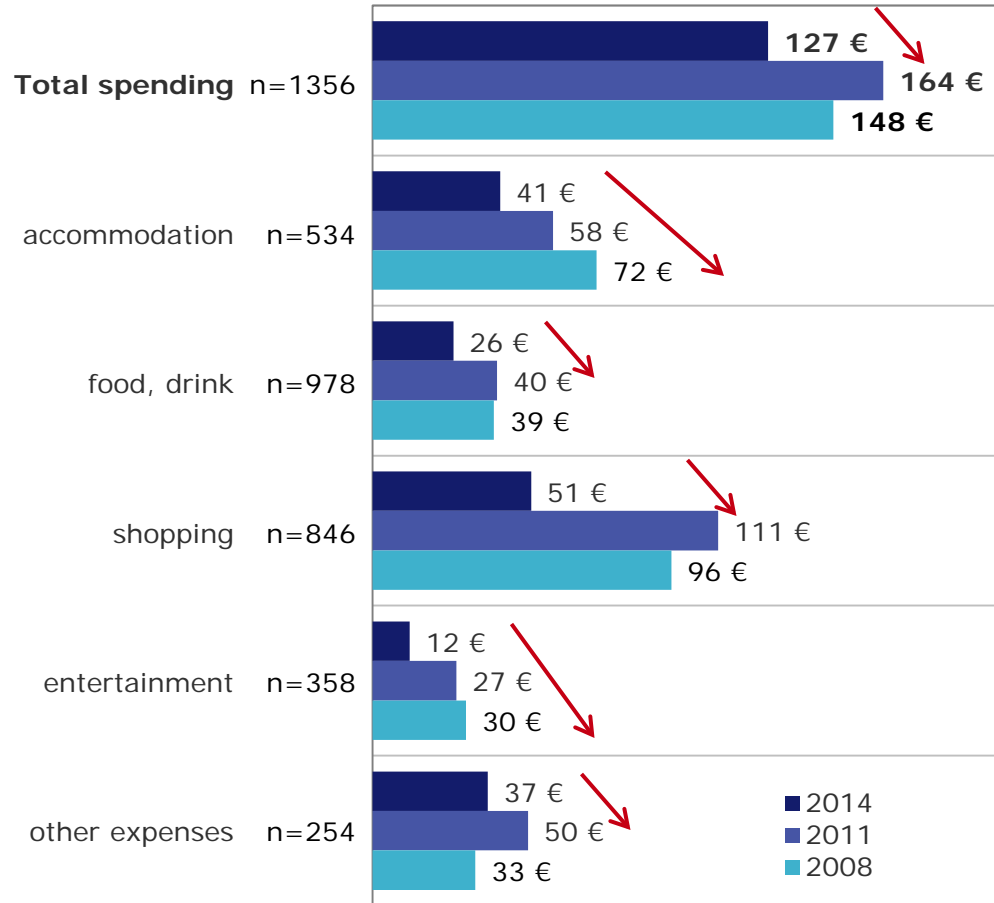
If your friends/relatives asked your advice about a holiday destination, how likely would you recommend Tallinn?



Average spending per person per day

Significantly less is spent on shopping than before

Average spending per person per day in EURO
Of those who spent money



Even though spending per foreign visitor a day is showing a decline, total spending by tourists in Tallinn has increased significantly due to an increased number of visitors (see slide 57).

Positive and negative aspects of Tallinn

Open-ended answers by foreign tourists

In the following section the open ended answers to the following question are presented:

Are there any comments you'd like to add about something that you are extremely satisfied with or what was the most positive experience you had in Tallinn?	Are there any comments you'd like to add about something that you were not satisfied with or what could be better in Tallinn?
<i>Old Town, Toompea (mentioned 226 times)</i>	<i>Traffic, confusing how to pay for the parking, bad roads (mentioned 77 times)</i>
<i>Nice people, attitudes of Estonians, friendly people, hospitable (mentioned 131 times)</i>	<i>Service (mentioned 60 times)</i>
<i>Restaurants and good food (mentioned 86 times)</i>	<i>Weather (43 times)</i>
<i>Good prices, good value for money (mentioned 49 times)</i>	<i>Signs, more information (mentioned 29 times)</i>
<i>Interesting museum, exhibition, zoo, attractions (mentioned 43 times)</i>	<i>Expensive, used to be cheaper (mentioned 38 times)</i>
<i>Liked everything, everything went smoothly, exceeded expectations, positive emotions (mentioned 53 times)</i>	<i>Poor language skills (mentioned 26 times)</i>
<i>Service (quick, pleasant) (mentioned 32 times)</i>	<i>Expensive public transportation, unfair to foreign visitors, difficult to understand, taxi (mentioned 27 times)</i>
<i>Beautiful city (mentioned 41 times)</i>	<i>People could be more friendly (mentioned 19 times)</i>
<i>Compact city, everything is close, easy to get around (mentioned 42 times)</i>	<i>Could be cleaner, clearing the snow (mentioned 10 times)</i>
<i>Cultural, cultural events (mentioned 38 times)</i>	<i>Architecture, appearance of the city (mentioned 8 times)</i>
<i>Good hotel (mentioned 34 times)</i>	

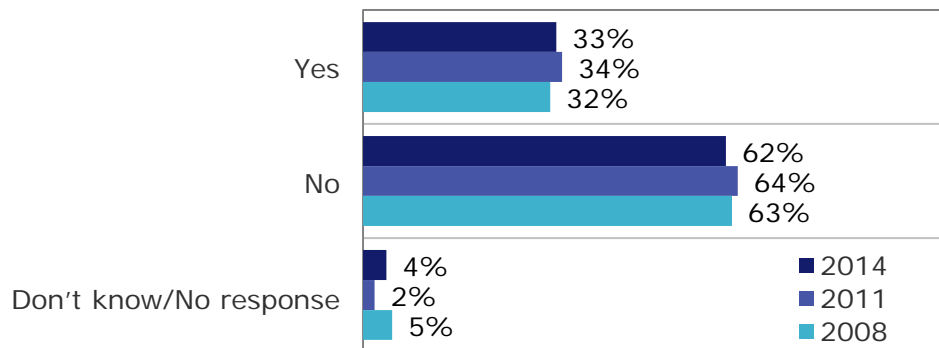
Information about Tallinn Card and its usage

One third have heard of the Tallinn Card, one quarter of them have used it

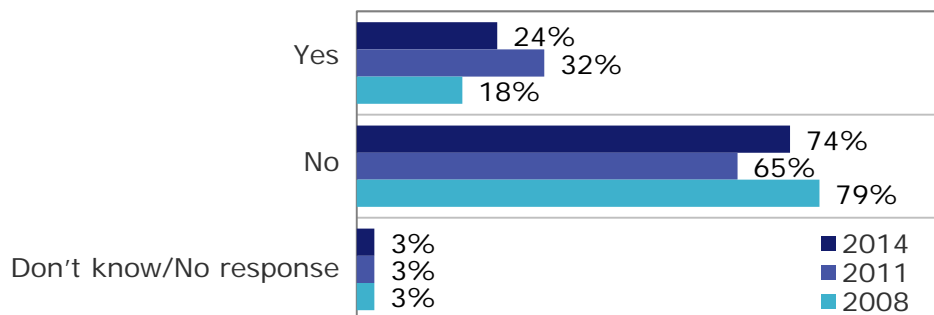
% of visitors to Tallinn, n=1569



Do you know or have you heard anything about the Tallinn Card? n=1569



Have you used the Tallinn Card? n=513



Extended to reporting population based on respondents' expenses

Total spending by foreign tourists in Tallinn in 2014 (in EURO)(1)

Number of respondents	Average per respondent	Standard deviation	Error on 95% confidence level	Lower	Upper	Reporting population	Average money	Lower	Upper
TFV (1464)	273,44	415,47	11,02	262,42	284,46	3343904	914 357 110	877507288	951206932
Cruise(130)	34,52	51,47	4,51	30,01	39,03	470438	1 623 9520	14117844	18361195
Total						3 814 342€	930 596 630€	891 625 132€	969 568 127€

Extended to reporting population based on respondents' expenses

Total spending by foreign tourists in Tallinn in 2011 (in EURO)(2)

Number of respondents	Average per respondent	Standard deviation	Error on 95% confidence level	Lower	Upper	Reporting population	Average money	Lower	Upper
TFV(1162)	277,26	396,00	22,77	254,49	300,03	2281427	632 548 450	580 602 132	684 494 768
Cruise(130)	37,43	48,00	8,25	29,18	45,68	430796	16 124 694	12 570 041	19 679 348
Turnaround (45)	42,19	45,00	13,55	28,64	55,74	7204	303 937	206 318	401 555
Total						2719427	648 977 000 €	593 378 000 €	704 576 000 €

8

Summary



Overall summary (1)

Foreign visitors to Tallinn 2014

- **In 2014, 3,81 foreign visitors visited Tallinn**, which is 40% more than in 2011. Half (51%) of all the foreign visitors spent a night in Tallinn, 37% of them at an accommodation establishment and 14% with friends or relatives. Cruise passengers not spending the night in Tallinn made up 12% of all visitors to Tallinn and one-day visitors – 37%.
- **The majority of foreign visitors (excl. cruise passengers) are from neighboring Finland (52%)** and a significant share are from **Russia (11%)**.
- Compared to 2011, there haven't been any great changes in the profile of foreign visitors, the share of students and pupils has decreased somewhat.
- Unlike before, in 2014 the share of those foreign visitors spending **the night in Tallinn decreased somewhat (69% in 2014, 75% in 2011)** which means **almost one third (31%) visit Tallinn only for one day**.
- Even though for half of the foreign visitors spending the night away from home, Tallinn is the only destination during the trip, we can see a general downward trend (only destination for 51% in 2014 vs. 75% in 2008) and **Tallinn is slowly becoming one of many visited destinations (10% in 2008 vs. 32% in 2014)**.
- Regarding the visit to Tallinn, it is **mostly a holiday**, for one third it is a trip lasting several days and one quarter come to Tallinn for one day.
- Compared to 2008, **there has been an increase in the share of foreign visitors who are here for the first time (14%→23%)** as well as in the share of visitors who **have been in Tallinn 5-10 times**. Year after year there has been an increase in the number of average visits, which **reached 17 in 2014** (as a comparison, 13 in 2008).
- Compared to before, there has been a small decrease in the share of those foreign visitors who spend at least one night away from home. But among the foreign visitors spending at least one night away from home, there has been an increase in the number of nights spent away from home (4,3 in 2008 and 6,3 in 2014). Three quarters of those who stay overnight during their trip also stay overnight in Tallinn.
- **Eight out of ten foreign visitors spend the night at a paid accommodation establishment**, reserving a place or booking a room primarily **on the internet**.

Overall summary (2)

Foreign visitors to Tallinn – activities and satisfaction

- **The decision to travel to Tallinn** is generally made (70%) **within a month** before arriving in the city. Visitors generally arrive by **ship/ferry** but planes and buses also play a significant role. In town they primarily get around **on foot** (79%), 37% take the taxi, one fifth have the possibility to use a car and one fifth use public transport. The share of public transport has decreased somewhat compared to 2011.
- In addition to **old town and downtown**, they also visit **other areas of Tallinn**, including Kalamaja and immediate surroundings of Tallinn.
- Before the trip, the more important sources of information are previous visit to Tallinn and recommendations by friends/acquaintances. During the trip they also value recommendations by friends/acquaintances but they also ask for advice from hotel or other accommodation establishment personnel, read brochures and information materials on Tallinn or search for information about Tallinn on the internet.
- On average, **foreign visitors to Tallinn carry out 3-4 activities during their trip**. More popular activities continue to be walking around the city, going to cafes and restaurants and shopping, even though the share of shopping has decreased significantly during the last three years. Compared to before, they do less sightseeing and go to pubs/nightclubs less.
- **The city and customer service in Tallinn are rated very highly.**
- **General impression of the trip to Tallinn continues to be very good** and almost all foreign visitors to Tallinn would recommend visiting Tallinn to their friends/acquaintances. Also, nine out of ten foreign visitors are convinced they would visit Tallinn again during the next five years.
- Even though foreign visitors' total spending per person per day has decreased, considering the increase in the total number of foreign visitors, **all foreign visitors** (excl. cruise passengers) **combined spent an estimated 877-951 million EURO in 2014** and cruise passengers spent **14-18 million EURO**, which is considerably more than in 2011.

9

Appendix: Sample methodology



Appendix 1

Sample methodology 2014

- The general population of the survey comprised all foreign tourists who visited Tallinn in 2014. During the course of the survey, 1727 foreign visitors were interviewed, including 1569 regular tourists and 158 cruise passengers.
- While compiling the sample, respondents were divided according to country of origin with the objective to cover all priority target markets with a sufficient number of respondents. Priority target markets include Finland, Sweden, Norway, United Kingdom, Germany, Russia and Latvia.
- The division of the sample was based on the 2012 statistics on foreign visitors who stayed in accommodation establishments in Tallinn. The respondents were divided as follows:
 - by months, taking into consideration the seasonal differences of visitors (i.e. interviews took place during all months, different weeks of a month and on all days of the week);
 - by locations of interview, whereas the main ways of arrival in terms of countries of origin were taken into consideration. The main places of interview were Tallinn Airport, Port of Tallinn, Tallinn Bus Station and railway station as well as border crossing in Narva.

Appendix 2

Sample methodology 2014

- The sample of the survey is based on quota sampling. The quotas include the country of origin of the respondent, place of conducting the interview (or the “exit gate” from Tallinn) and the share of cruise passengers.
- Here follows the division of planned and actual sample from the first six months of 2014 in accordance with countries and “exit gates (H – harbour, A – airport, L – land).

Planned sample (2014)

Country	S	L	M	Total
Finland	375	25	0	400
Sweden	100	50	0	150
Norway	10	80	10	100
United Kingdom	50	90	10	150
Germany	60	115	25	200
Russia	25	60	115	200
Latvia	5	25	70	100
Other countries	100	60	40	200
Total:	725	505	270	1500

Actual sample (2014)

	S	L	M	Total
Finland	374	24	3	401
Sweden	100	49	1	150
Norway	13	85	7	105
United Kingdom	57	93	9	159
Germany	63	144	10	217
Russia	27	57	141	225
Latvia	7	23	75	105
Other countries	103	66	38	207
Total:	744	541	284	1569

Data collection

- The survey was conducted using the PAPI method (*Paper and Pencil Interviewing*). Average length of one interview was 20 minutes. When necessary, response cards were used during the course of the interview.
- Interviews were conducted in Finnish, English, Russian and German.
- The quality of how paper questionnaires were filled in and how the data from them was entered was guaranteed as follows:
 - after the end of each monthly survey period, TNS Emor production project manager **visually checked the completion of paper questionnaires**;
 - visually checked paper questionnaires were entered using a special data entry program. The data entry program was developed using Ci3 software;
 - the data entry program **mechanically checked** the quality of completed questionnaires – the program contains pre-programmed filters, cycles, response intervals and logic checks of responses. The previously mentioned methods also help to prevent data entry errors. Using questionnaire numbers as the basis, the program also excludes the possibility to enter one questionnaire multiple times.
- 10 TNS Emor's specially trained interviewers participated in the fieldwork.
- Fieldwork periods in 2014 and January of 2015: January 24-30, February 17-25, March 8-15, April 9-16, May 15-22, June 10-18, July 6-15, August 25-31, September 16-23, October 22-29, November 21-28, December 11-20, January 5-8.
- Cruise passengers were interviewed during survey periods in May, June, July and August.

Data collection statistics

Interview location	
Harbour	744
Airport	541
Ikla border crossing	135
Narva border crossing	117
Train station	24
Elsewhere	8

Interview month	
January	74
February	92
March	123
April	135
May	144
June	142
July	184
August	181
September	178
October	115
November	106
December	95

Day of the week	
Monday	186
Tuesday	238
Wednesday	281
Thursday	173
Friday	224
Saturday	203
Sunday	264

Time of the interview	
before 12.00	369
12.00 - 14.00	309
14.00 - 17.00	455
after 17.00	415

Weather on the day of interview	
windy	603
cold	298
sunny	711
rainy	281
cloudy, dry	458

Data weighting (1)

- Data has been weighted using the following methodologies:

I weighting methodology:

- As of May 1st 2004, national statistics on number of overnight stays in official accommodation establishments in Tallinn. Free accommodation and one-day visitors have been added to national statistics (proportions in the breakdown of countries according to 2014 Tallinn Foreign Visitor survey results).

II weighting methodology:

- In addition to national statistics and 2014 Tallinn Foreign Visitor survey results, we have also factored in Port of Tallinn statistics on cruise passengers in weighting one-day visitors and those getting free accommodation.
- With comparability as the objective, the results in this report have been presented using the first weighting methodology but assessments of the general population (i.e. assessments of the number of Tallinn foreign visitors and proportions of different countries) have been presented using the second weighting methodology.
- Next, we have presented in the form of tables the general numbers used as basis for data weighting (second methodology).

Data weighting (2)

NUMBER OF ACCOMMODATED FOREIGN TOURISTS, 2014 (Statistics Estonia)					
	2014 1st quarter	2014 2nd quarter	2014 3rd quarter	2014 4th quarter	TOTAL
Finland	120051	180643	195060	168291	664045
Sweden	7546	13872	16673	11806	49897
Norway	4741	8535	8647	8557	30480
United Kingdom	5649	11086	12641	9838	39214
Germany	5065	27062	38886	8636	79649
Russia	58604	40600	36903	40947	177054
Latvia	8668	11163	10917	12607	43355
Other countries	78750	142918	181927	115915	519510
Total:	289074	435879	501654	376597	1 603 204

ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS TO TALLINN 2014, ACCOMMODATION (without cruise)			
	paid+free accommodation	1-day visitors	TOTAL
Finland	746118	993085	1739203
Sweden	57419	29579	86998
Norway	36416	5586	42002
United Kingdom	49954	9303	59257
Germany	94820	9607	104427
Russia	246593	111307	357900
Latvia	69703	29167	98870
Other countries	640580	214667	855247
Total:	1941603	1402301	3343904

Data weighting (3)

ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS 2014, SEASONALITY (without cruise)					
	1st quarter	2nd quarter	3rd quarter	4th quarter	TOTAL
Finland	314426	473123	510882	440772	1739203
Sweden	13157	24187	29070	20584	86998
Norway	6533	11761	11916	11792	42002
United Kingdom	8536	16752	19103	14866	59257
Germany	6641	35481	50982	11323	104427
Russia	118463	82070	74596	82771	357900
Latvia	19767	25457	24896	28750	98870
Other countries	129643	235280	299498	190826	855247
Total:	617166	904111	1020943	801684	3343904

Comparison of weighted and non-weighted samples, 2014, without cruise						
	Assessment of total population	% of total population	Weighted results	% of weighted sample	Non-weighted results	% of non-weighted sample
Finland	1739203	52%	816	52%	401	26%
Sweden	86998	3%	41	3%	150	10%
Norway	42002	1%	20	1%	105	7%
United Kingdom	59257	2%	28	2%	159	10%
Germany	104427	3%	49	3%	217	14%
Russia	357900	11%	168	11%	225	14%
Latvia	98870	3%	46	3%	105	7%
Other countries	855247	26%	401	26%	207	13%
Total:	3343904	100%	1569	100%	1569	100%

Appendix 3

Project team

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

Client's contact person:	Kristina Lukk, Karen Alamets
Survey plan and report:	Annette Schultz
Sample design:	Katre Seema
Fieldwork coordination:	Marju Kalve
Data processing:	Aivar Felding
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Tallinn visitor survey 2014

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