

# Tallinn visitor survey 2014

Finland



TNS Emor  
March 2015



**TNS Emor**  
Tallinn visitor survey 2014  
© TNS



# Table of Contents

---

## 1

Introduction and background of Finnish foreign visitors 3

---

## 2

Summary of main results 5

---

## 3

Purpose of the visit and route 11

---

## 4

Spending the night in Tallinn and accommodations 15

---

## 5

Planning the trip to Tallinn 20

---

---

## 6

Visit to Tallinn 25

---

## 7

Appendix :  
Sample methodology 40

---

# 1

## Introduction and background of Finnish foreign visitors





- 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 results of the survey are presented in separate reports for different target countries, including the general report of all foreign visitors and separate analysis of tourists from Finland, Russia, Latvia, Sweden and Norway, United Kingdom and Germany as well as cruise passengers.
- **This report describes foreign visitors to Tallinn who come from Finland.**
- 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.

# 2

## Summary of main results



# Summary (1)

## The largest number of foreign visitors continues to come from Finland



- In 2014, approximately 1,74 million Finnish tourists visited Tallinn, making up the largest share of all foreign visitors to Tallinn, 46% including cruise passengers and 52% without.
- Unlike other foreign visitors, tourists from Finland include more over 65-year-olds than on the average and those who are travelling with their partner/spouse or other adults. By status, there are more skilled workers and other workers, pensioners and unemployed people among tourists from Finland.
  - Compared to 2008, there have been small changes in the socio-demographic profile of foreign visitors from Finland. Tourists have become somewhat older and there has been a slight decrease in the share of those who travel with other adults. There has been a noticeable decrease in the share of students and pupils (12%→6%).
- 62% of Finns visiting Tallinn have spent at least one night away from home, which is considerably less than three years ago (82%). There has also been a noticeable drop in the share of those Finnish tourists for whom Tallinn is the only destination during the trip (76%→ 89%) and compared to before, more Finnish people visit other places in Estonia.
- On average, 1,6 nights are spent in Tallinn, which has decreased somewhat compared to 2008 (1,9 nights).
- The main purpose of the visit to Tallinn is holiday and the majority of Finns describe the trip as a short break.
- 90% of those who have spent at least one night in Tallinn stay at a paid accommodation establishment and compared to 2008, there has been an increase in the share of those staying with an acquaintance/relative.
- Even though using the internet to book accommodation is on an upward trend, a large share of Finns still use the help of a travel agency/tour operator. Finding accommodation through the ship company is also on the increase.
- One quarter of Finnish tourists make the decision to travel to Tallinn less than one week before arrival, 31% 1-2 weeks before arrival and 32% 3-4 weeks before arrival.
- Finns visit Tallinn more frequently than foreign visitors from any other country. While an average tourist has visited Tallinn 17 times, Finns have on average visited Tallinn 22 times.
- Travel decision is influenced greatly by discounted offers or favorable ticket prices.

## Summary (2)

### Main activities – shopping and going to beauty salons



- Since Finns generally visit Tallinn often and only 3% are first-time visitors then the main sources of information before the trip are experience from previous trip and recommendations from friends/acquaintances. Different pages on the internet, incl. travel portals and forums (TripAdvisor etc.) also play an important role.
- As before, the majority of Finnish foreign visitors arrive in Tallinn by ship or ferry (94%). In Tallinn they mainly get around on foot, one third use taxis, 11% get around by car and 10% use public transport, the relative importance of which has decreased considerably during the last three years.
- In addition to old town and downtown, Finnish visitors also reach other areas of Tallinn. Kadriorg, Kalamaja and other areas are visited more than before.
- During the trip, the most important source of information is recommendations from friends and acquaintances. Since a very large share of Finns are repeat visitors, 15% of them did not consider it important to search for additional information during the trip.
- On average, a visitor from Finland carries out 3-4 activities. The most important activities among Finns are shopping, taking walks and going to cafes and restaurants. Compared to visitors from other countries, Finns dedicate more time on shopping and going to beauty salons, the relative importance of which has increased steadily during the last six years. On the other hand, sightseeing is rather on a downward trend.
- Finnish visitors' total spending per day per person has dropped somewhat compared to 2011 (141 €→128 €) but taking into consideration the share of Finns among all foreign visitors and the increasing number of Finnish visitors, we can say that visitors from Finland have a significant input in increasing the profit from tourism in Tallinn.
- Evaluations of general impression of the trip to Tallinn have remained on a high 8,6-point level for years (on the scale of 10) and according to 79% the trip met their expectations. 28% of social media users share their travel experiences on social media and 35% plan to do so after the visit.

## Summary (3)

All plan on returning to Tallinn and 84% are definitely prepared to recommend Tallinn to friends



- Visitors from Finland give high scores to different image components of Tallinn as well as customer service. Equally high scores (3,8 points on the scale of 4) are given to the sufficient number of good restaurants, rich cultural life, number of sights and museums, good international transport connections and hospitality.
- Almost all visitors from Finland are convinced that they will visit Tallinn again during the next five years and compared to 2008, there has been a small increase in the share of those who claim that they will definitely visit Tallinn again.
- Recommending Tallinn to friends and acquaintances has also remained stable on a very high level during the last six years, practically all Finns would recommend a trip to Tallinn to their friends/ acquaintances.
- One third have heard of the Tallinn Card but only 27% of them have used it, the use of the card has increased year after year.



# Foreign visitors' country of residence

% of visitors to Tallinn



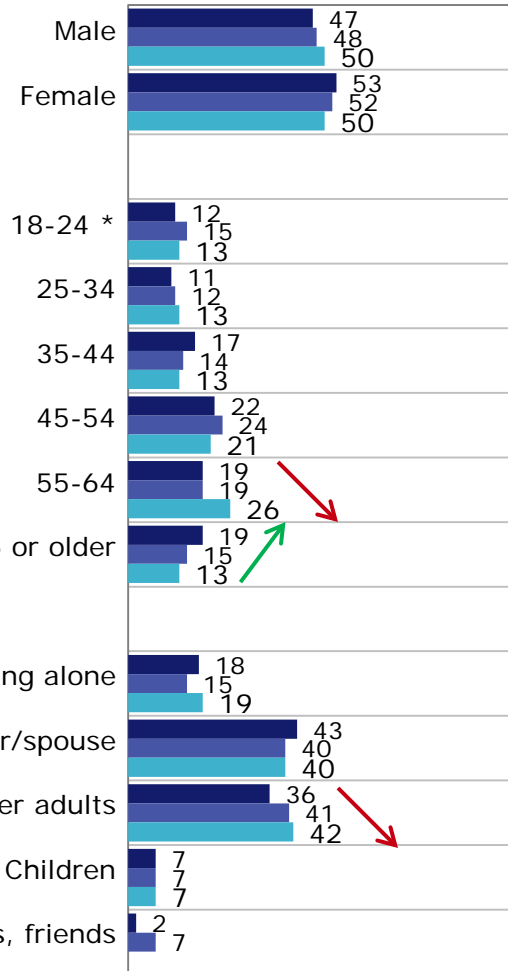
# Profile of visitors arriving to Tallinn from Finland

% of all foreign visitors from Finland, n= 401



## AGE

■ 2014 ■ 2011 ■ 2008

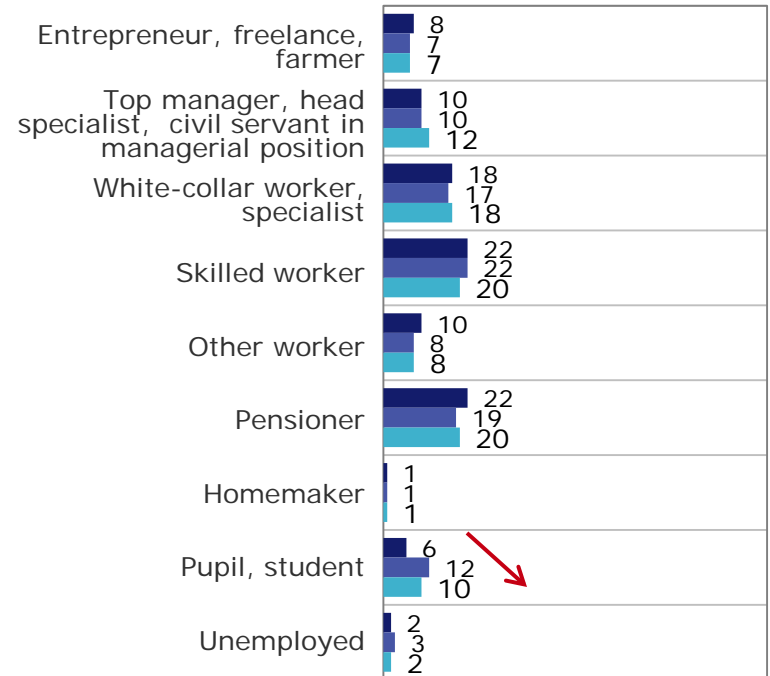


## GENDER

## TRAVEL COMPANION

## STATUS

■ 2014 ■ 2011 ■ 2008



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

# 3

## Purpose of the visit and route



# Tallinn as the destination

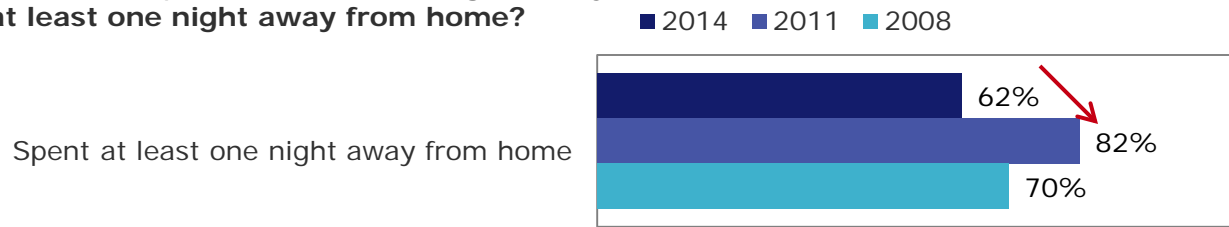
## Increasingly less Finns spend at least one night away from home



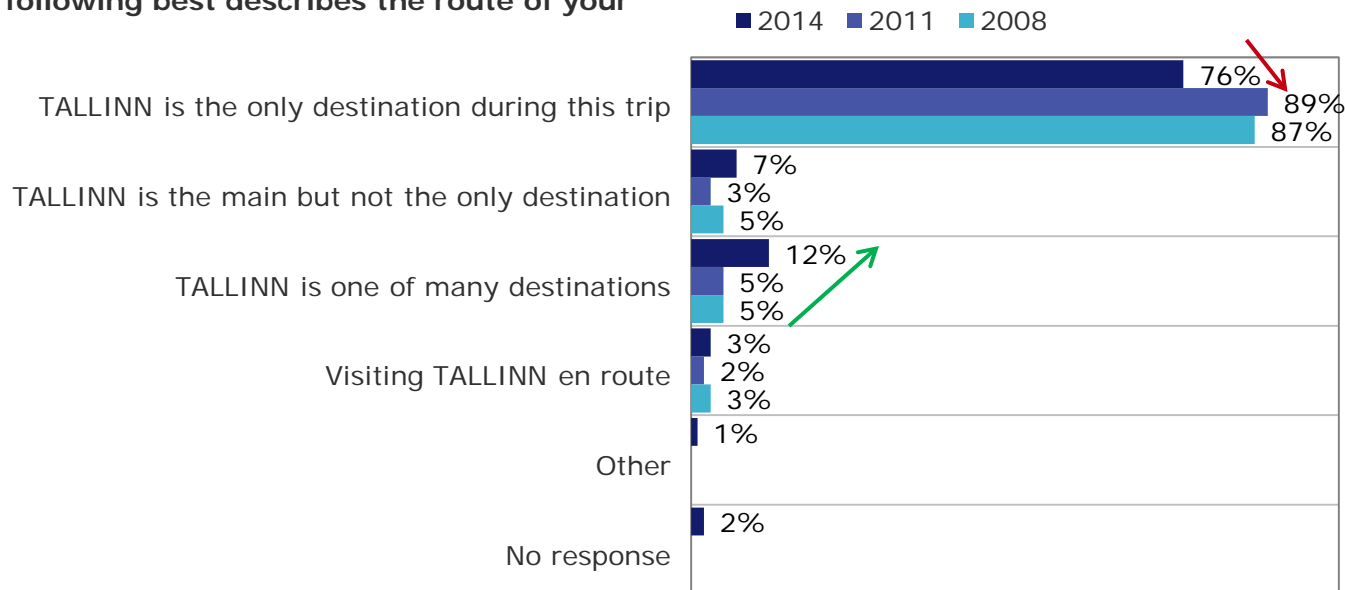
% of all foreign visitors from Finland, n= 401

% of all visitors who have spent at least one night away from home, n=249

**Are you spending at least one night away from home?**  
n=401



**Which of the following best describes the route of your trip?** n=249



# Purpose of the trip

## The main purpose is usually a holiday

% of all foreign visitors from Finland, n= 401



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



*Data not comparable, question has been changed*

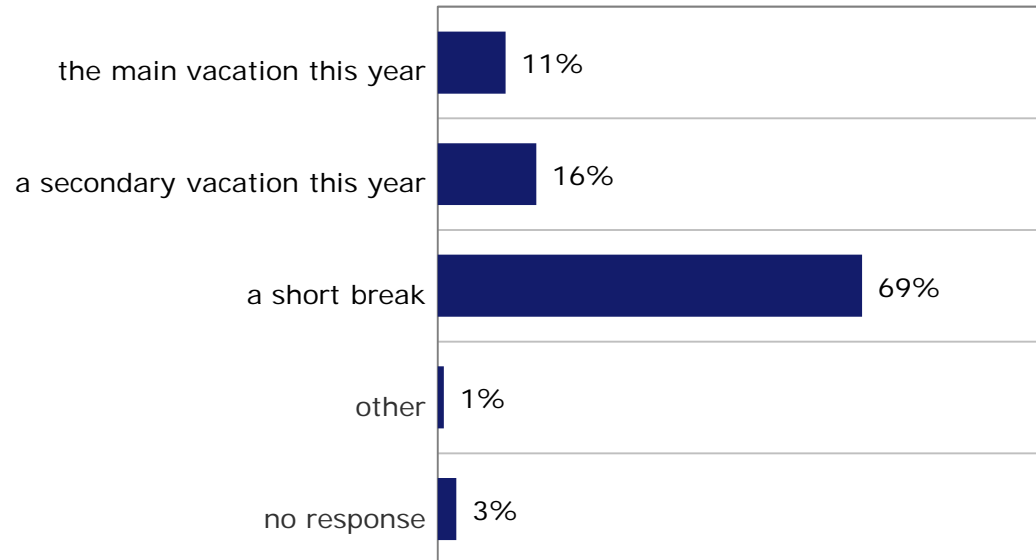
# Meaning of the holiday trip

## The trip to Tallinn is a short break



% of visitors to Tallinn who are on vacation for several days, visit friends and relatives, attend cultural/sporting events, n=148

Would you describe your holiday as ...



*Data not comparable, question asked from a different target group.*

# 4

## Spending the night in Tallinn and accommodations



# Spending the night away from home (1)

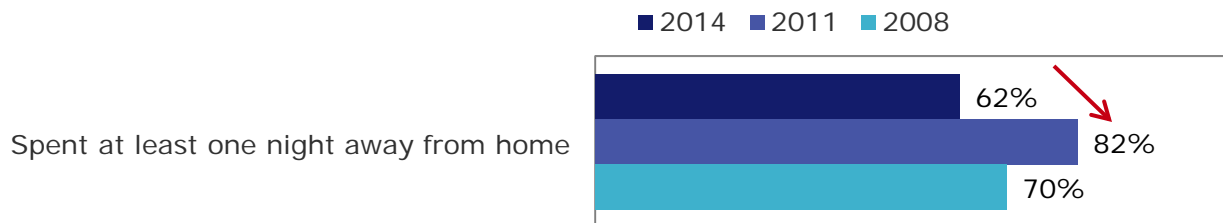
## Spending the night elsewhere in Estonia has tripled

% of all foreign visitors from Finland, n= 401

% of all visitors to Tallinn who have spent at least one night away from home, n=249

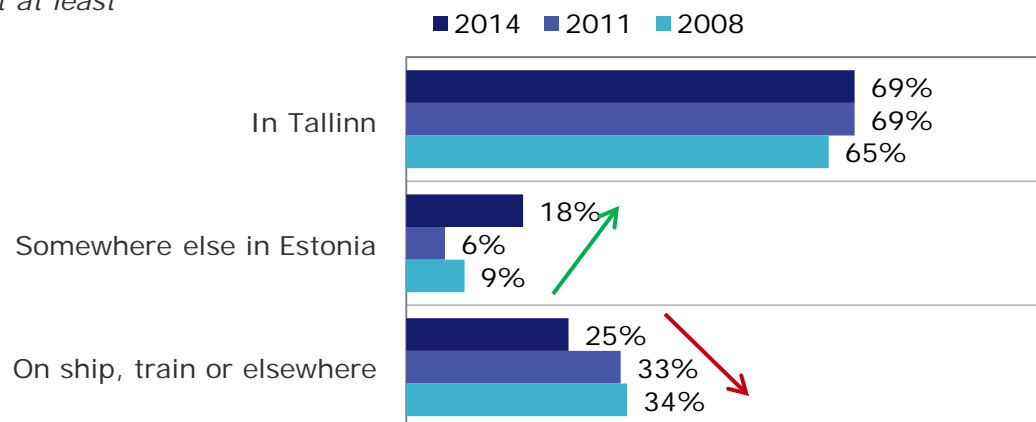


Are you spending at least one night away from home? n=401



How many nights did you spend ...? n=249

% of all visitors who have spent at least one night away from home



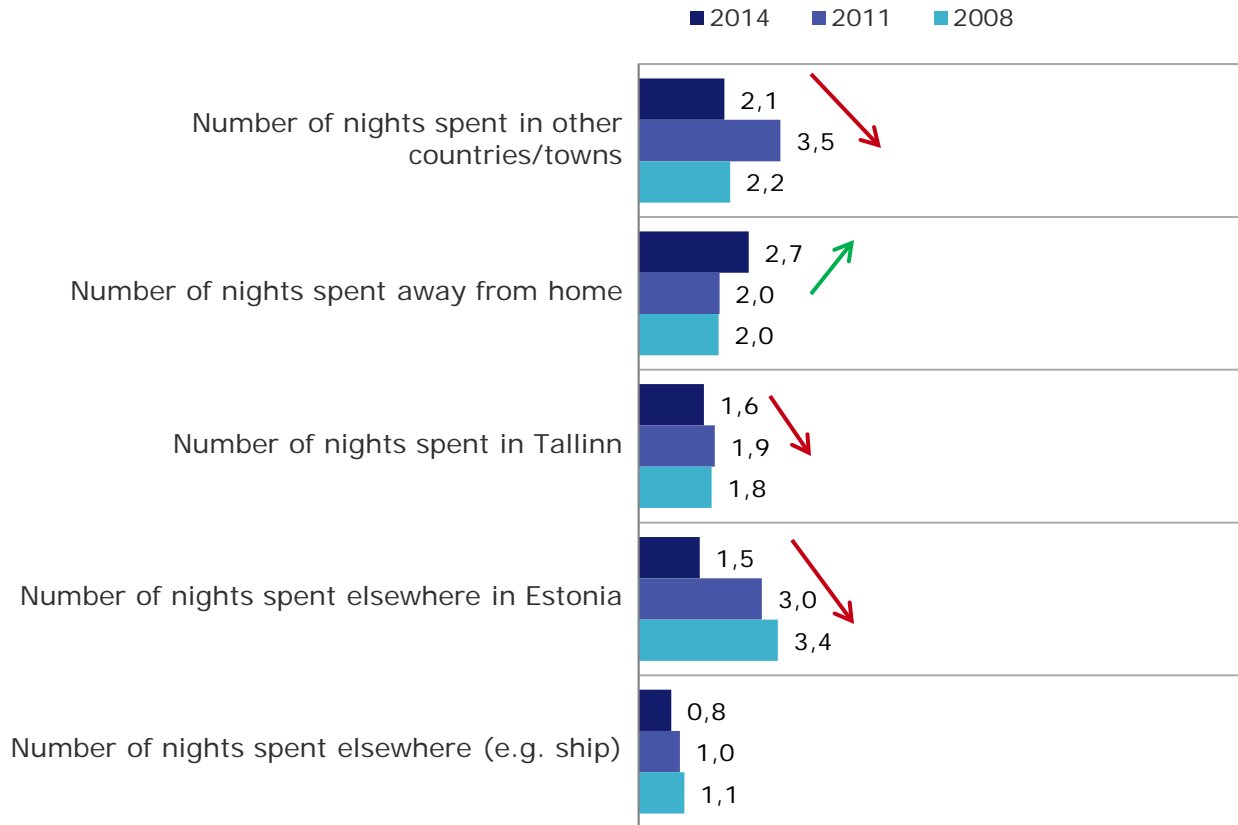


# Spending the night away from home (2)

## 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



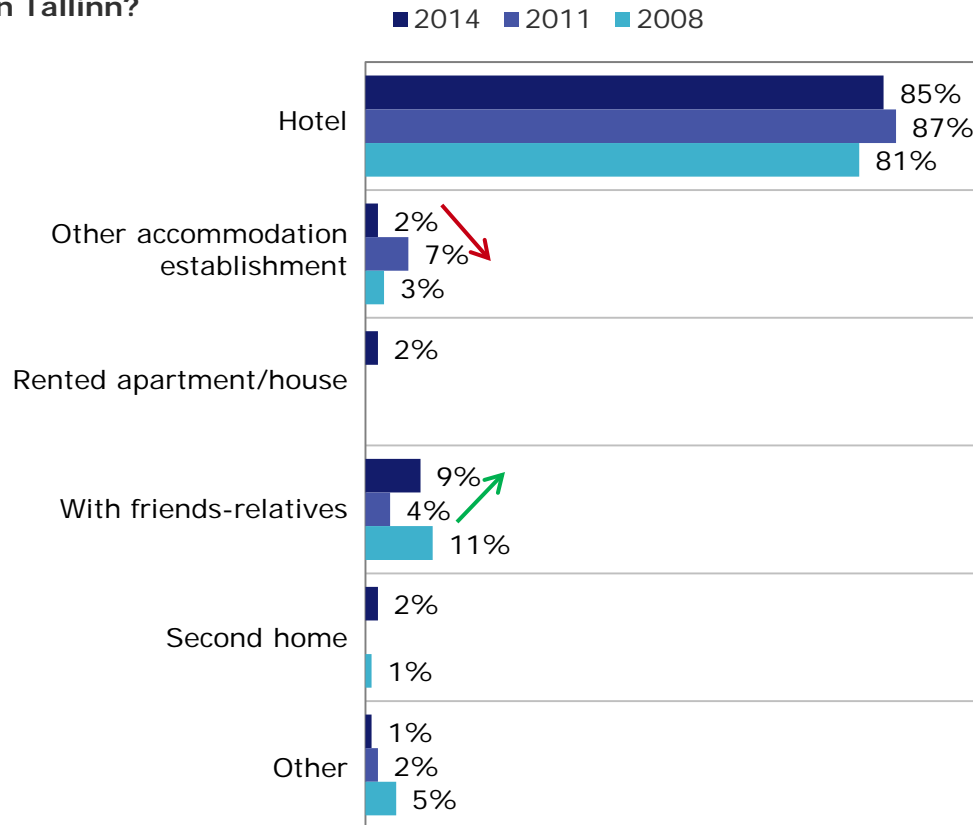
# Spending the night in Tallinn

## Nine out of ten Finns stay at a paid accommodation establishment



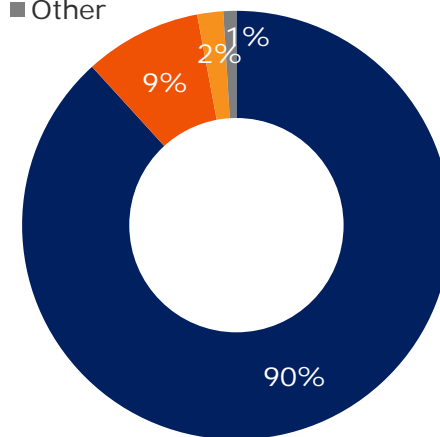
% of visitors to Tallinn who spent at least one night in Tallinn, n=172

Where did you spend the night in Tallinn?



Where did you spend the night in Tallinn?

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



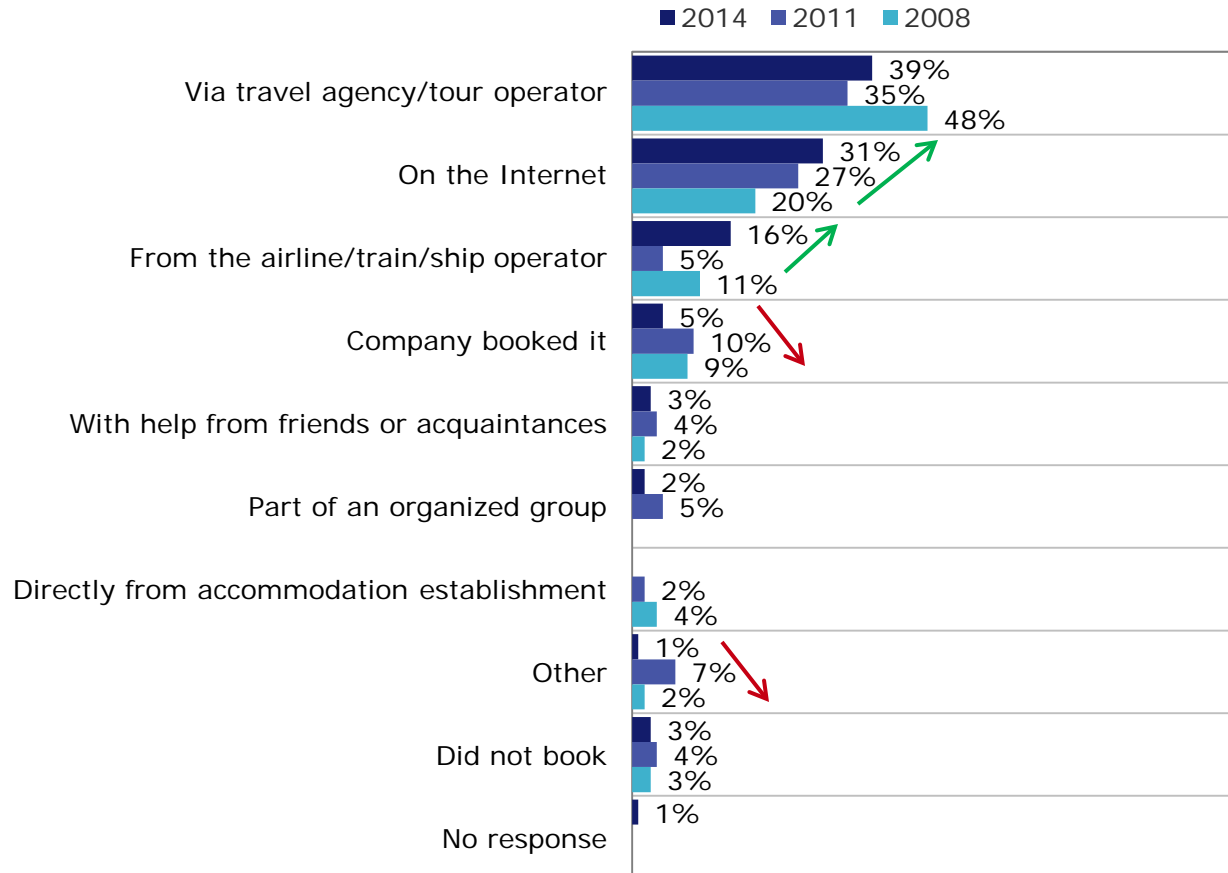
# Booking accommodation

## Booking on the internet is on an upward trend



% of visitors to Tallinn who spent at least one night at an accommodation establishment in Tallinn, n=157

How did you book your ACCOMMODATION in Tallinn?



# 5

## Planning the trip to Tallinn



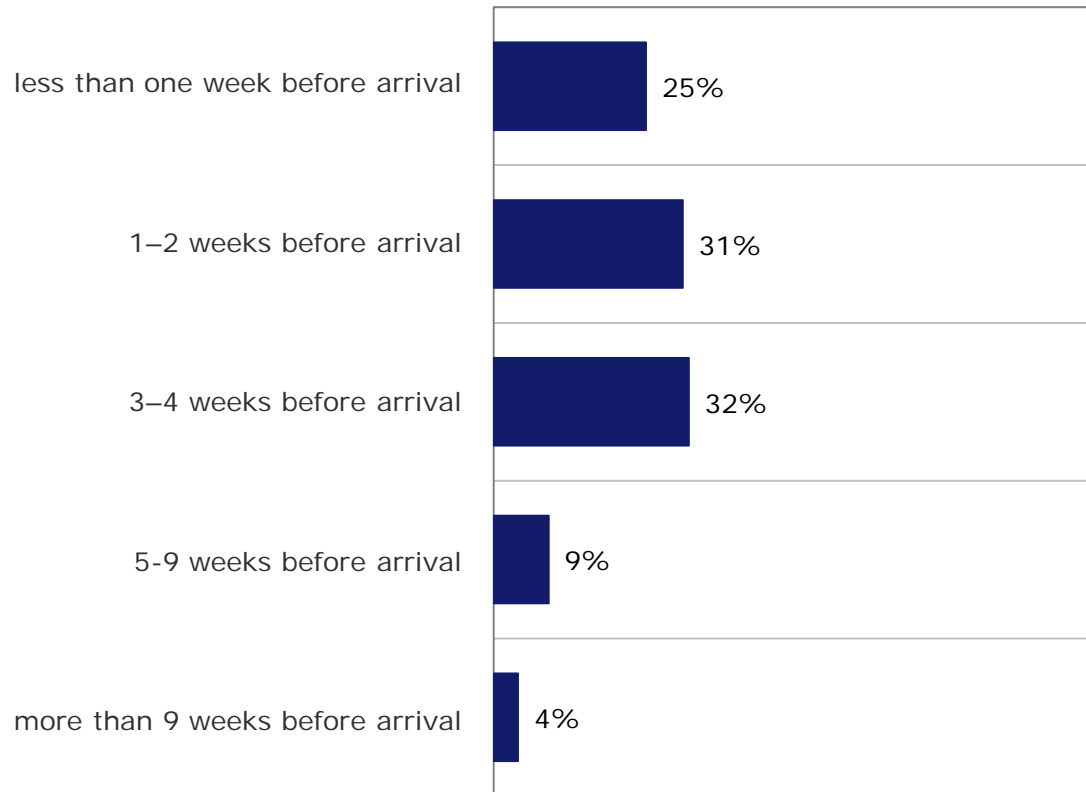
# The decision to travel to Tallinn

## One quarter of Finns make the decision less than one week before arriving in Tallinn

% of all foreign visitors from Finland, n= 401



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



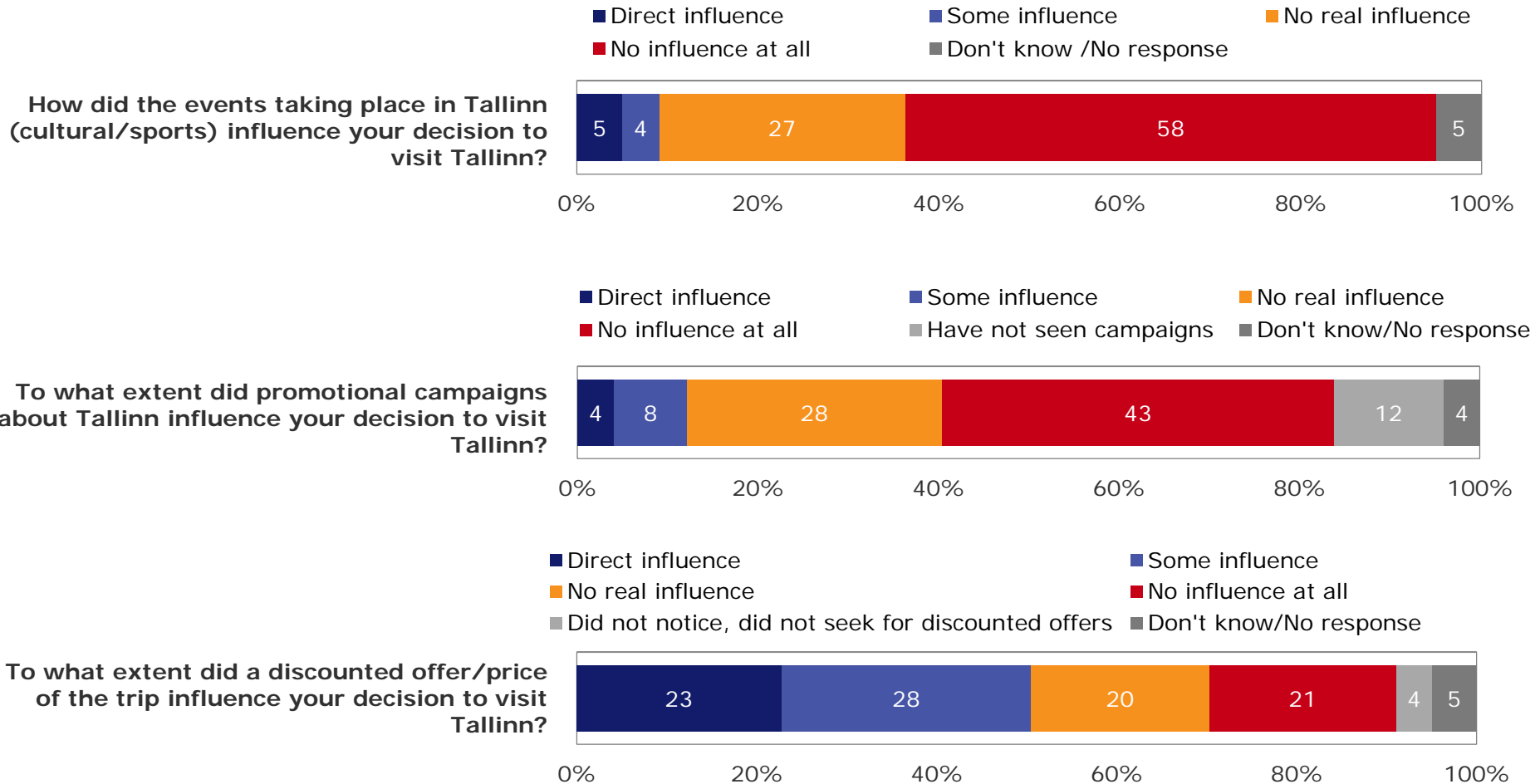
*Data not comparable, question has been changed.*

# Factors influencing the decision to travel to Tallinn

## Discounted travel offers or ticket prices have a big influence



% of visitors to Tallinn not on a business trip, n=368



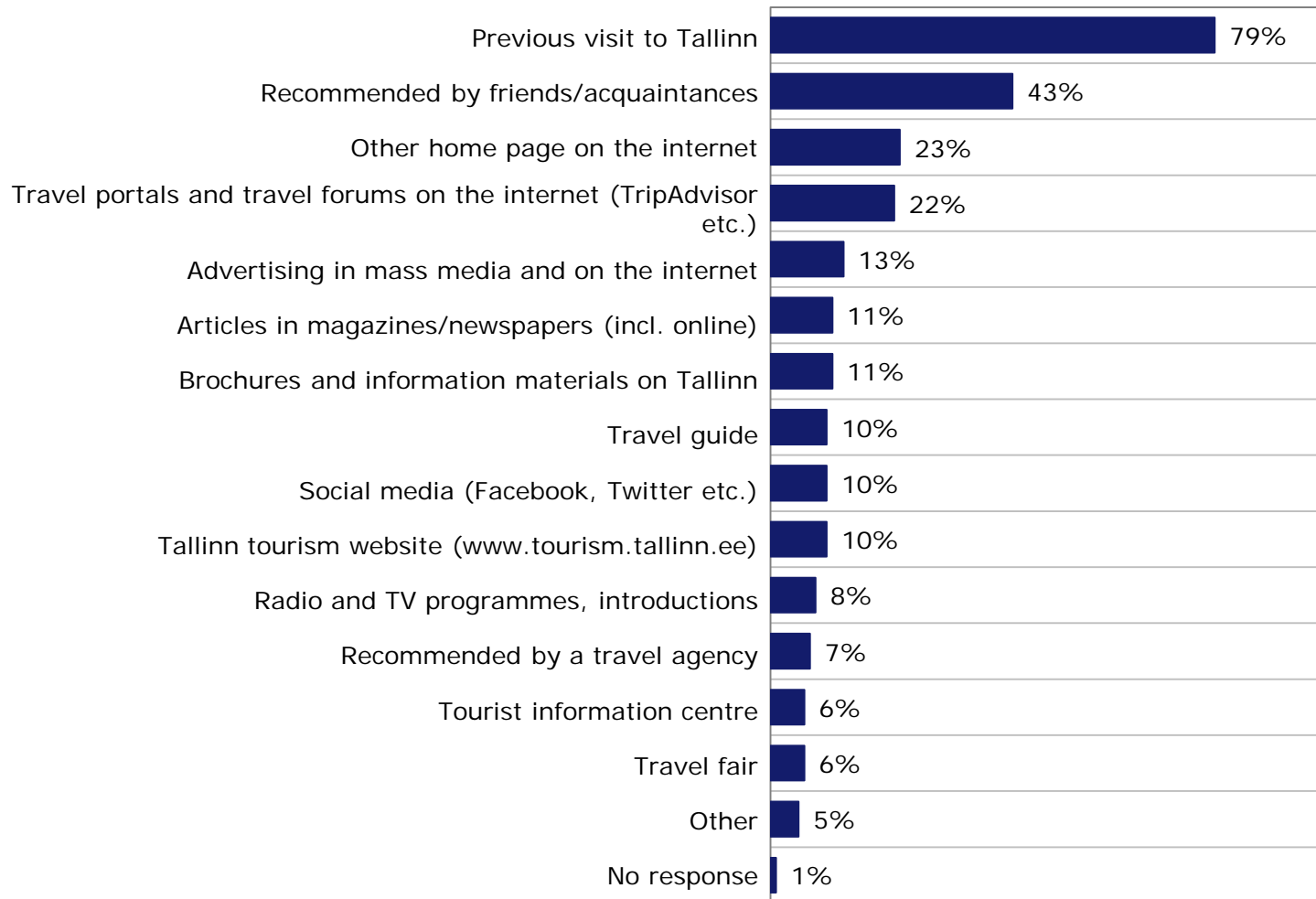
# Sources of information about Tallinn before the trip

## Personal previous experience is the main source of info



% of all foreign visitors from Finland, n= 401

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



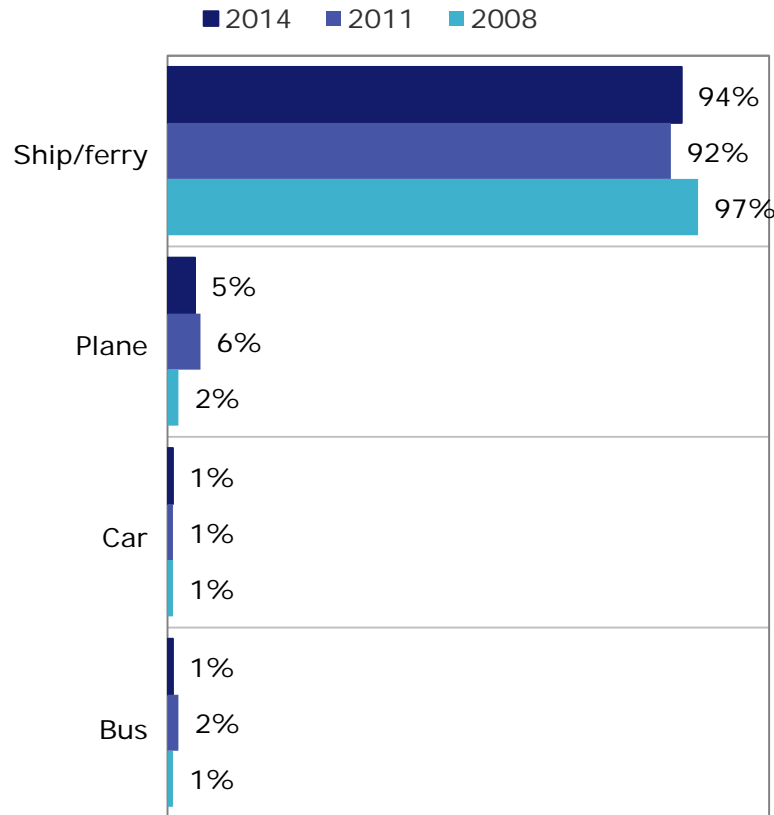
# Transport used to arrive in Tallinn

## Finns mainly arrive in Tallinn by ship or ferry

% of all foreign visitors from Finland, n= 401



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





# 6

## Visit to Tallinn

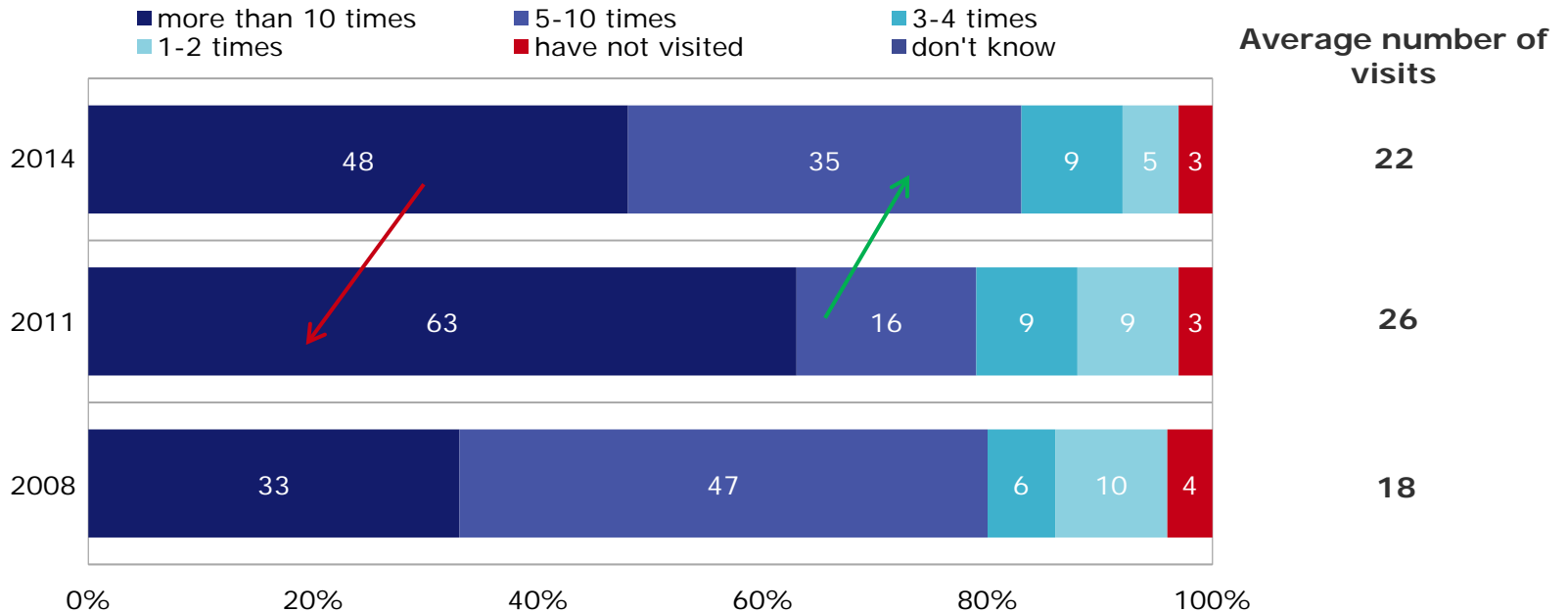


# Previous visit to Tallinn

## 83% of Finns have previously visited Tallinn at least five times

% of all visitors to Tallinn who were able to answer the question, n=372

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



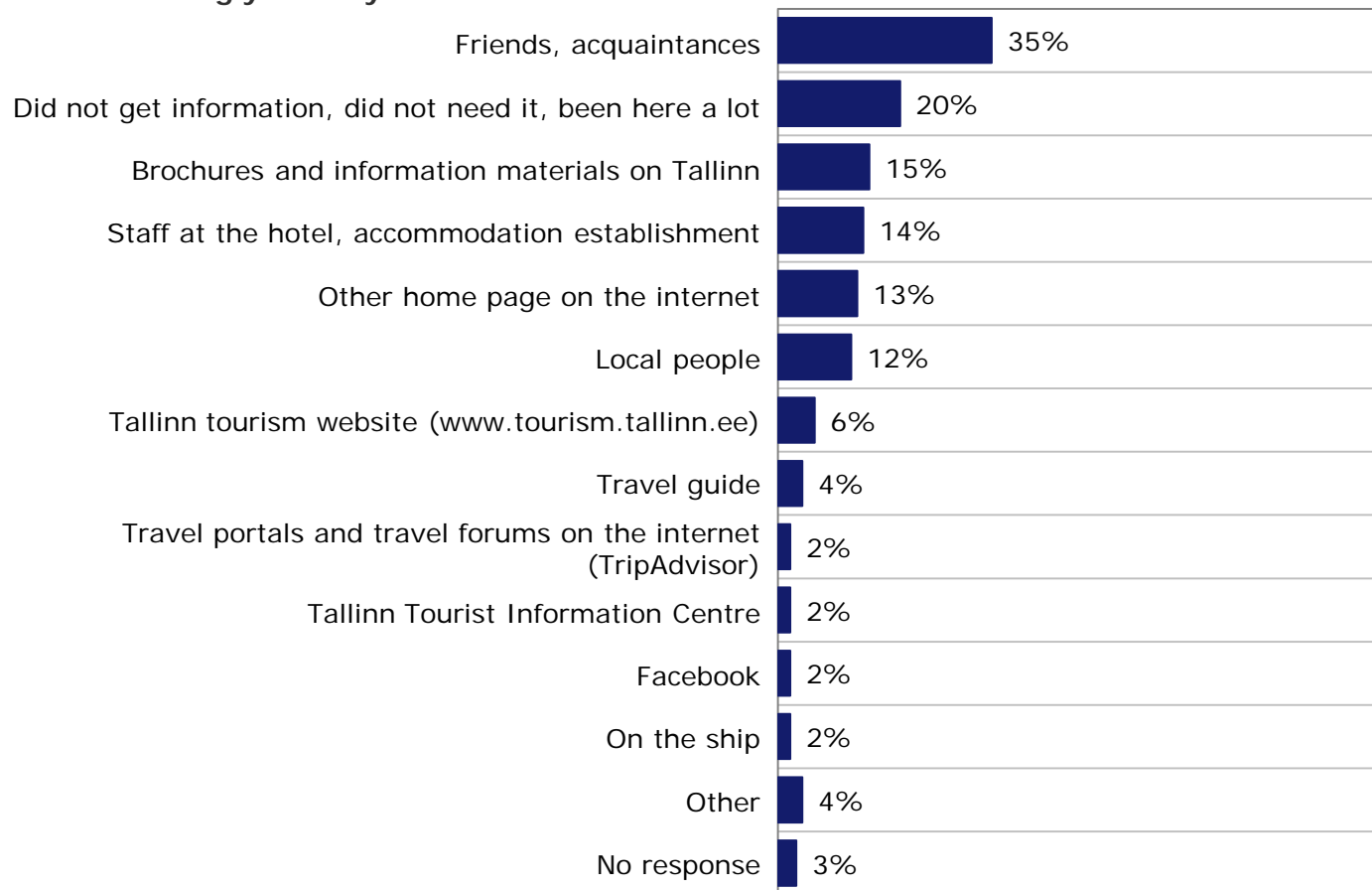
# Sources of information about Tallinn during the trip

## 20% did not need additional information during the trip



% of all foreign visitors from Finland, n= 401

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



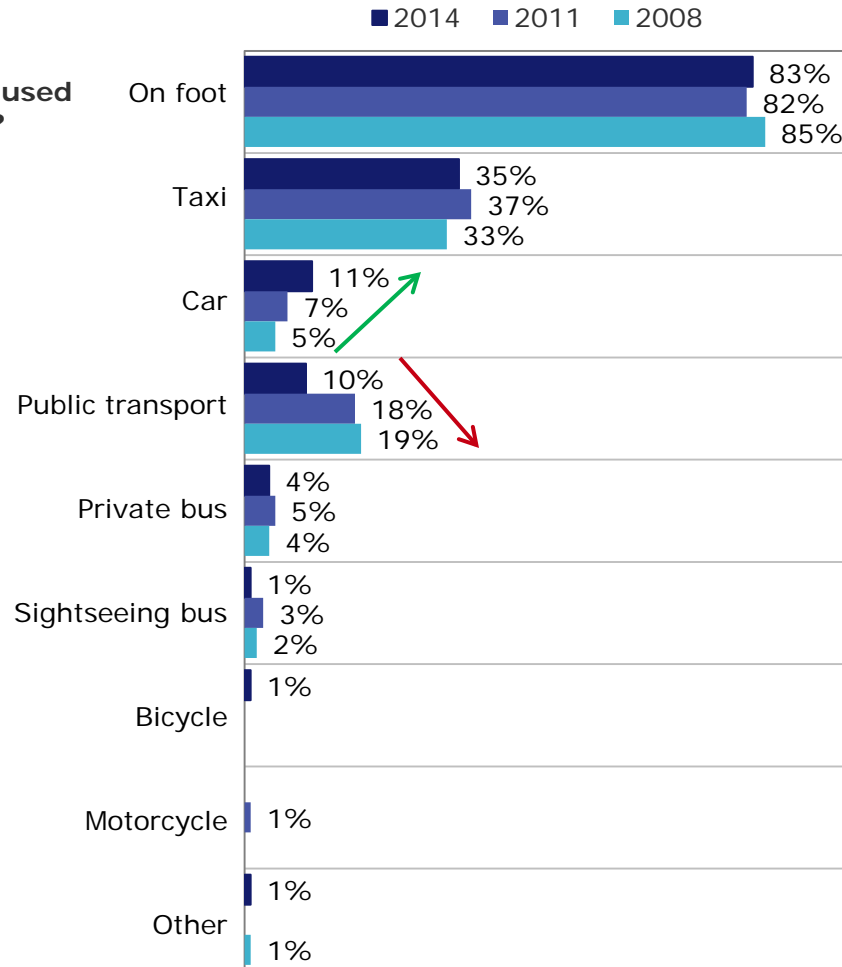
# Transport used in Tallinn

## Use of public transport has decreased, using cars is on an upward trend



% of all foreign visitors from Finland, n= 401

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



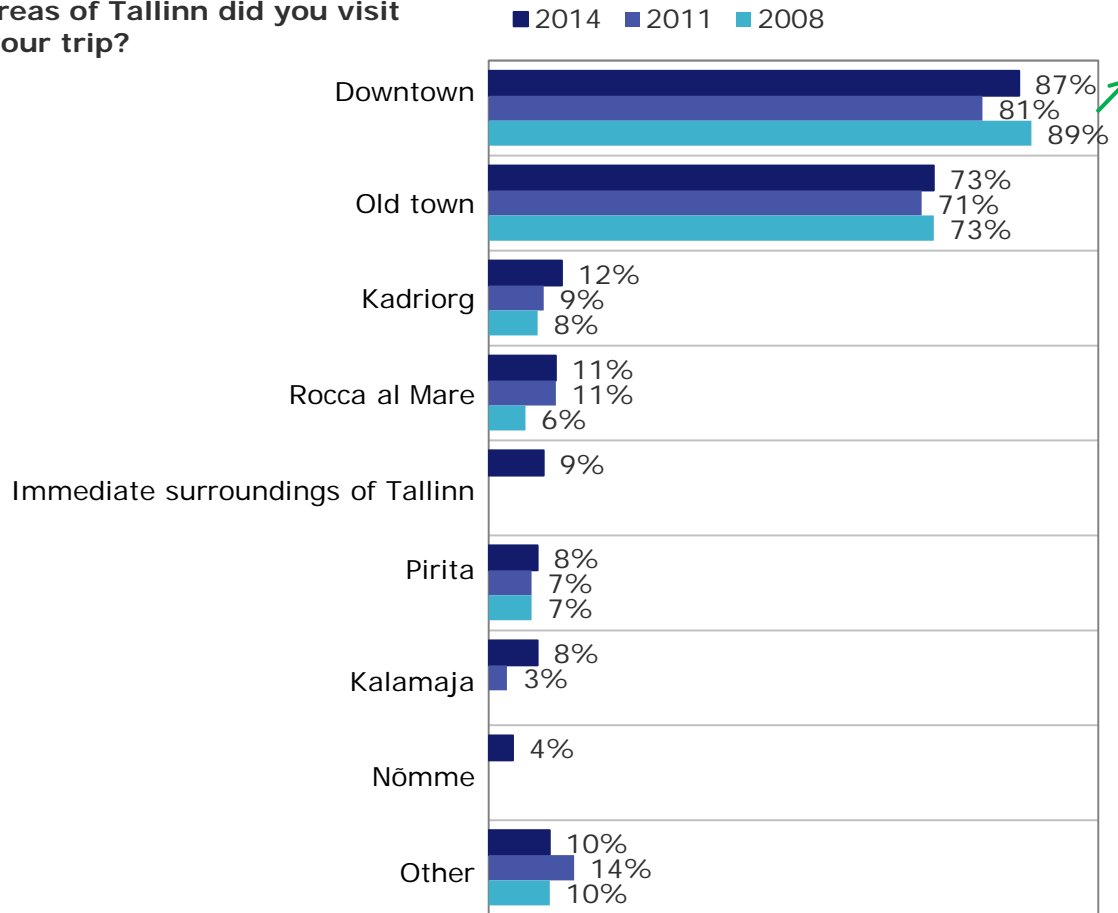
# Areas visited in Tallinn

## Finns visit other areas of Tallinn, besides old town and downtown, increasingly more often

% of all foreign visitors from Finland, n= 401



Which areas of Tallinn did you visit during your trip?



Other areas include the following:

- Kristiine, Kristiine shopping centre
- Lasnamäe
- Mustamäe
- Ülemiste, Ülemiste shopping centre
- Harbour area, Norde Centrum
- And other few areas

# Activities in Tallinn

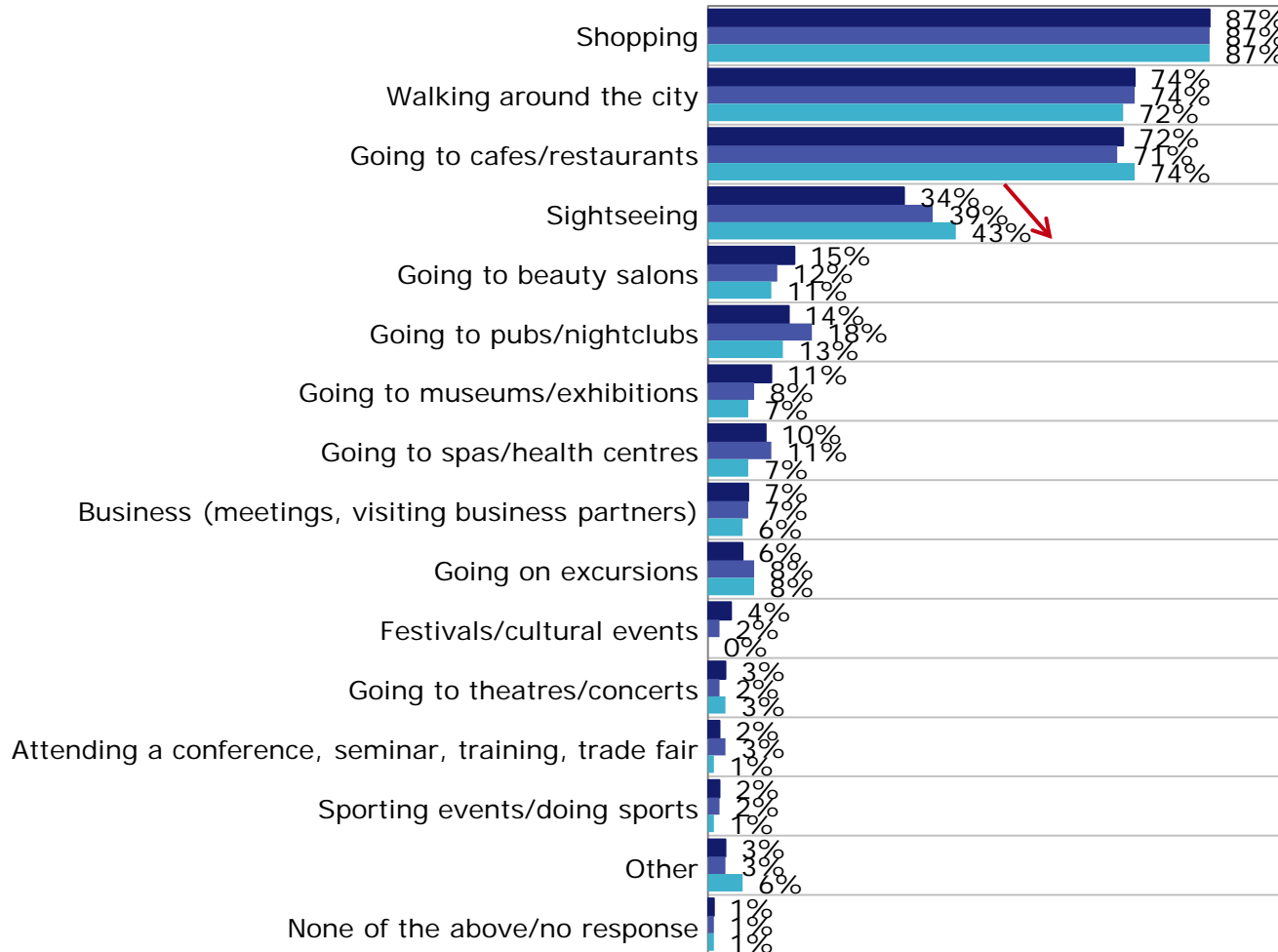
## Shopping is the main activity

% of all foreign visitors from Finland, n= 401



Which of the following activities did you do in Tallinn?

■ 2014 ■ 2011 ■ 2008



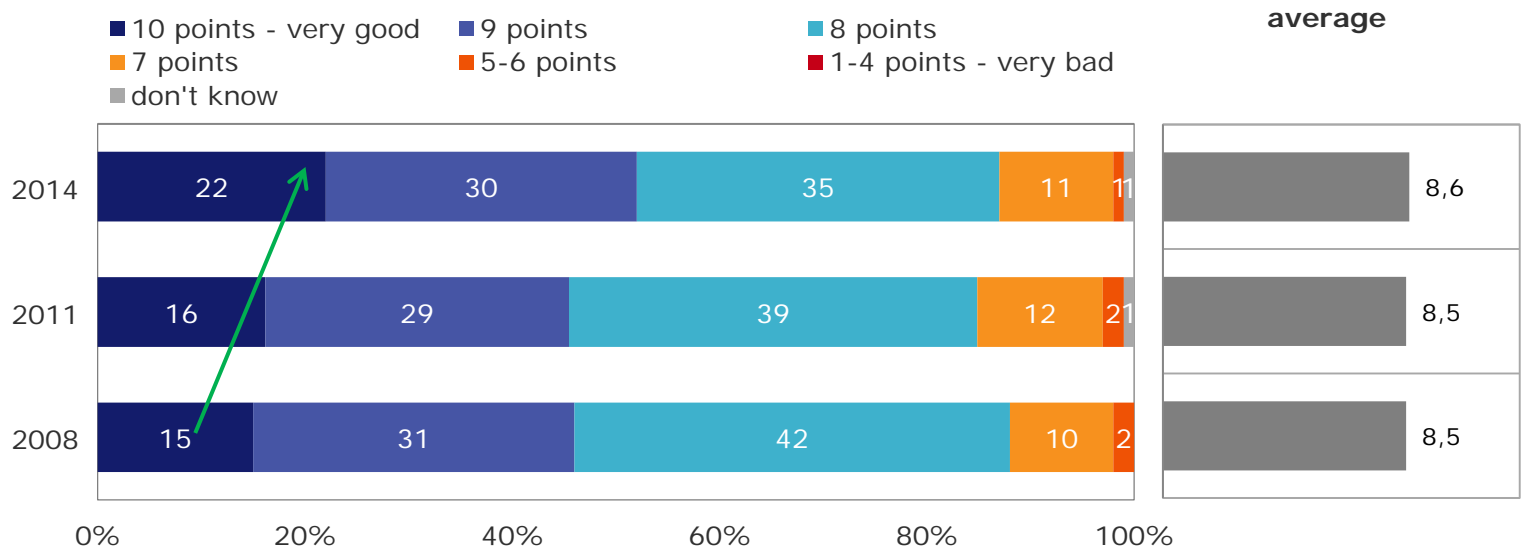
# Overall impression of the trip to Tallinn

## Overall impression of the city is continuously improving



% of all foreign visitors from Finland, n= 401

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?



# Sharing travel experiences on social media



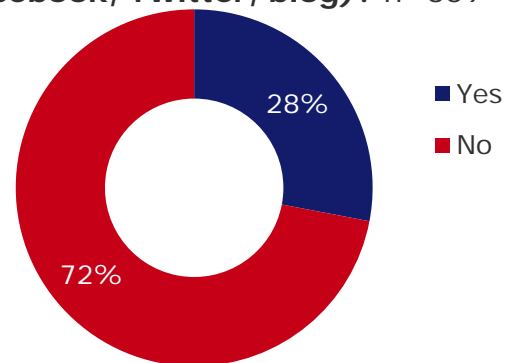
## One third plan to share travel experiences after the trip

% of all visitors in the target group

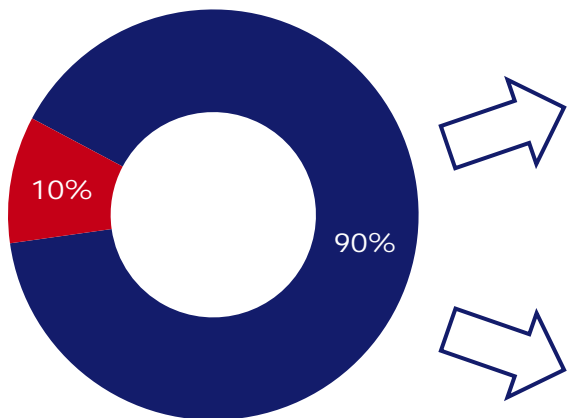
% of those using social media

Did you share travel experiences on social media during your stay in Tallinn (Facebook, Twitter, blog)? n=359

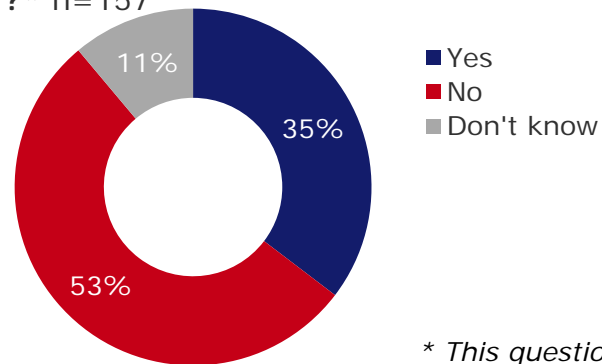
Use of social media (Facebook, Twitter, blogs), n=401



■ Uses social media  
■ Does not use social media



Do you plan to share your travel experiences on social media AFTER visiting Tallinn (Facebook, Twitter, blog)?\* n=157



\* This question was added in July.



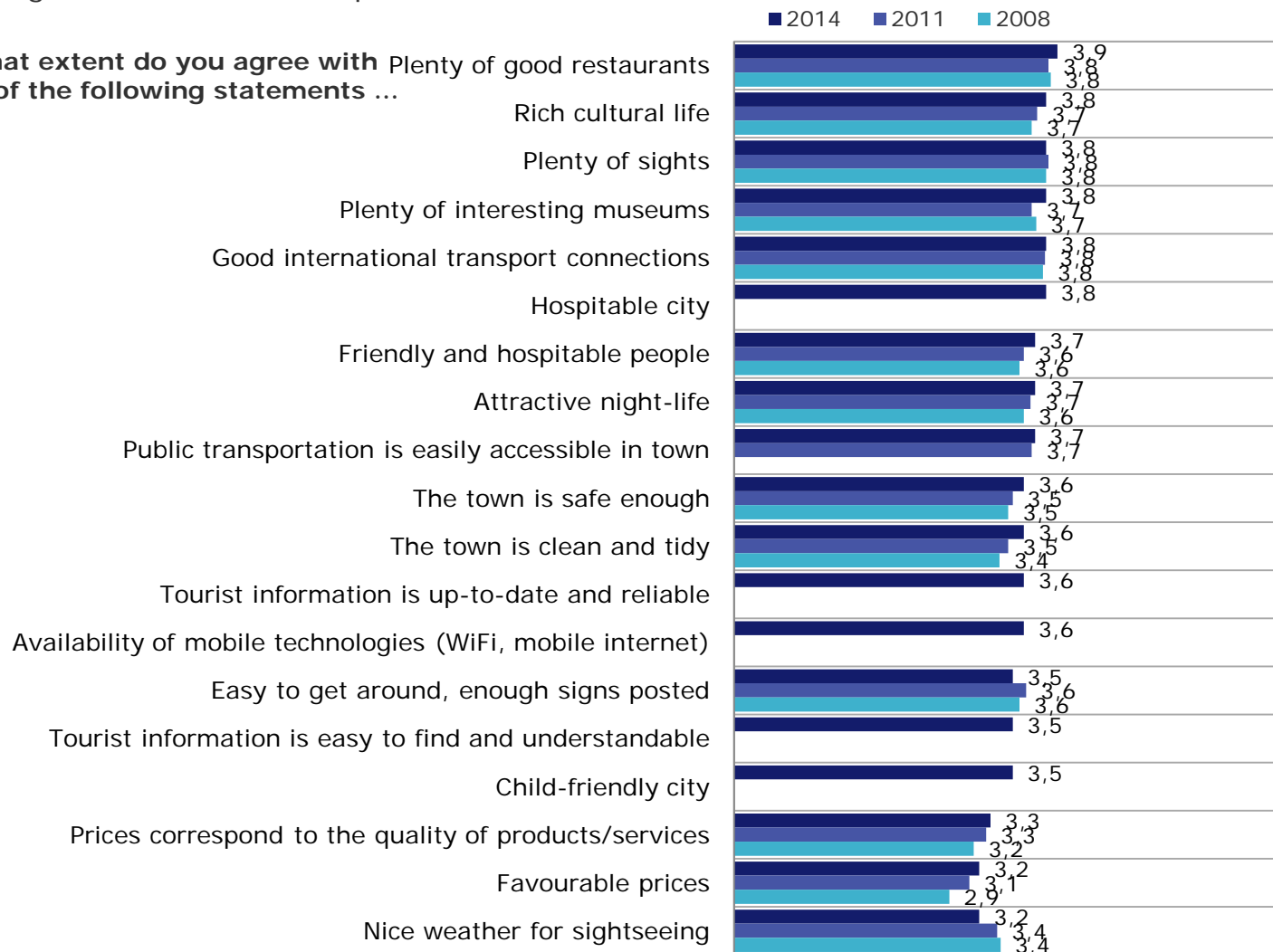
# Image of Tallinn

## Image components continuously receive high evaluations

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



To what extent do you agree with each of the following statements ...



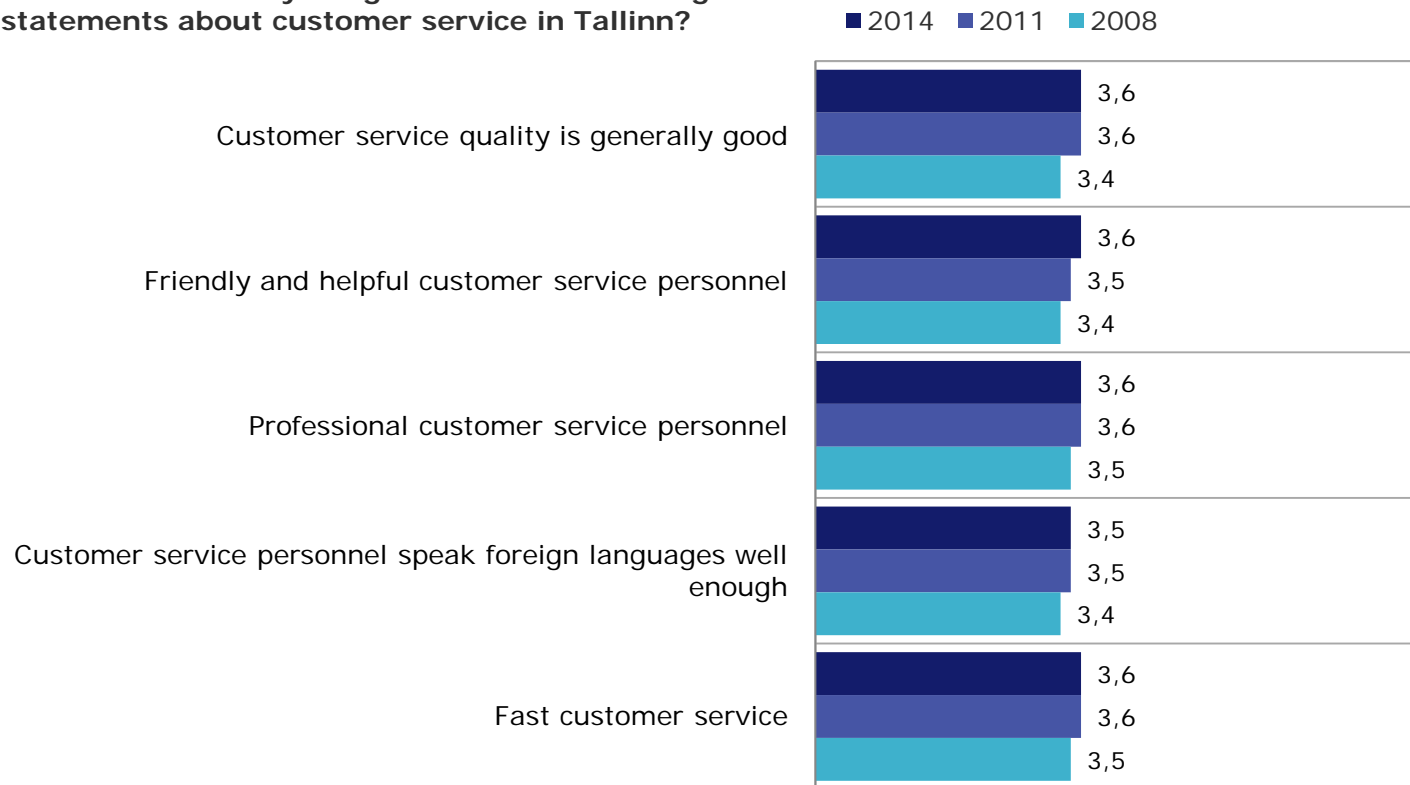
# Customer service in Tallinn

## Customer service receives high evaluations



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?



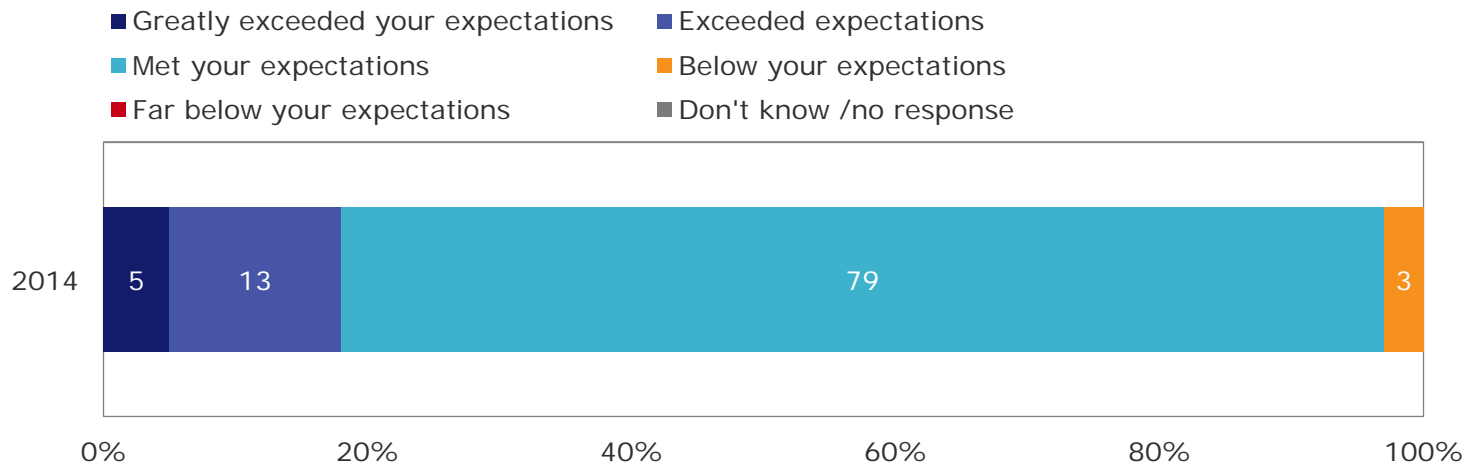
# Trip to Tallinn meeting expectations

## According to 79% of visitors the trip to Tallinn met their expectations



% of all foreign visitors from Finland, n= 401

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



*Data not comparable, question was added in 2014.*

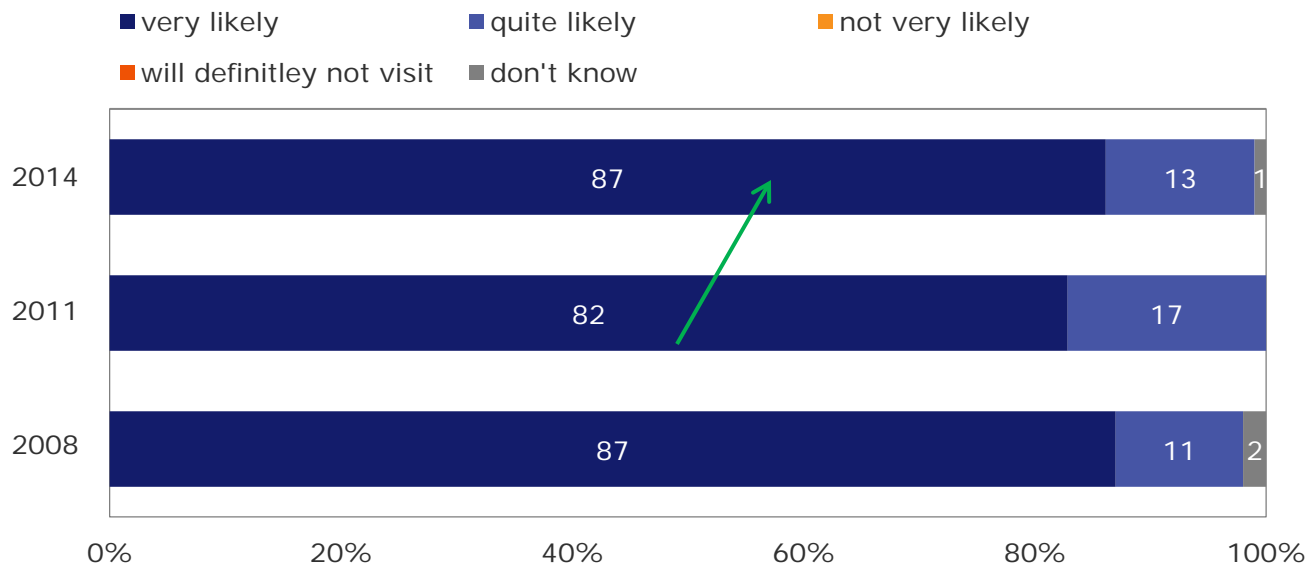
# Likelihood of visiting Tallinn again

## Large majority of Finns believe they will visit Tallinn again soon



% of all foreign visitors from Finland, n= 401

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



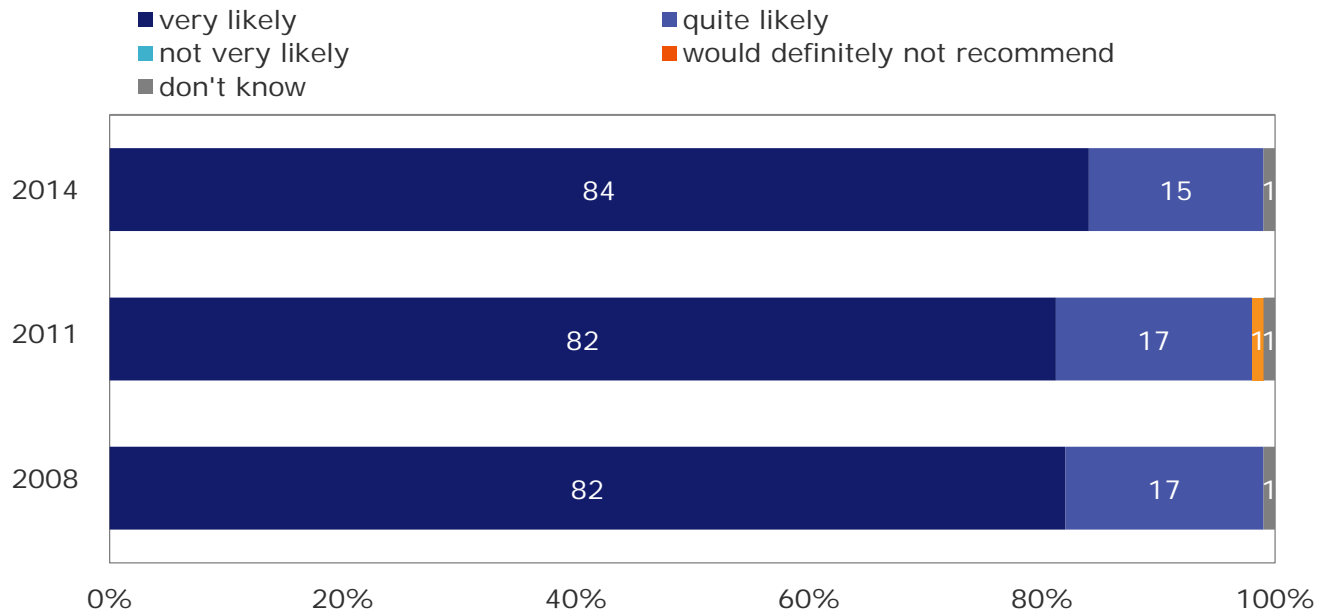
# Recommendation communication

## Large majority of Finns would recommend Tallinn to their friends



% of all foreign visitors from Finland, n= 401

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

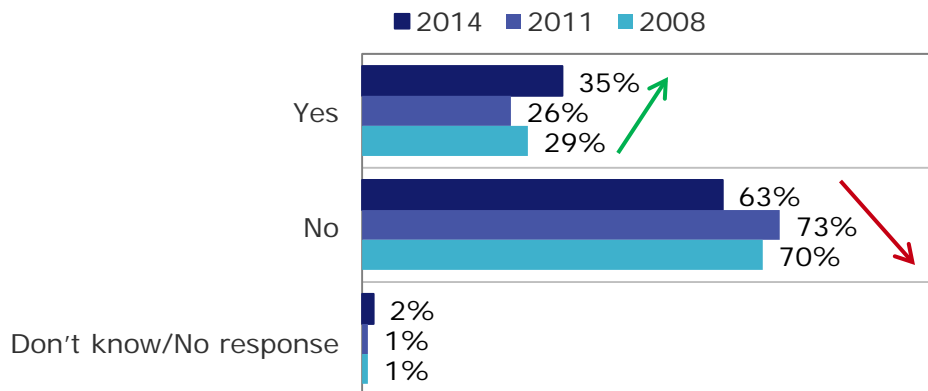


# Information about Tallinn Card and its usage

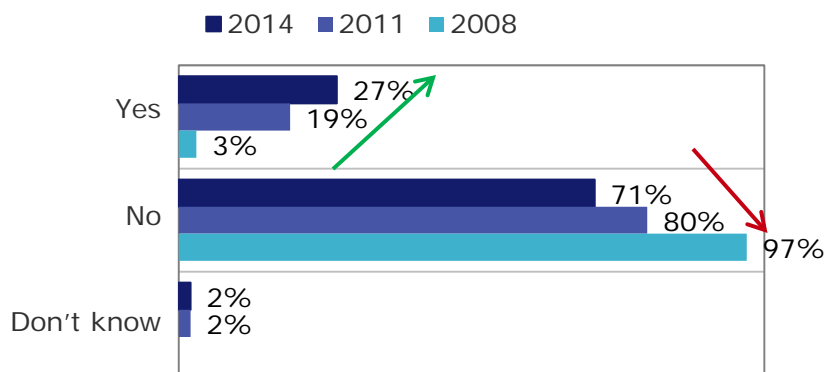
% of all foreign visitors from Finland, n= 401



Do you know or have you heard anything about the Tallinn Card?  
n=401



Have you used the Tallinn Card? n=139

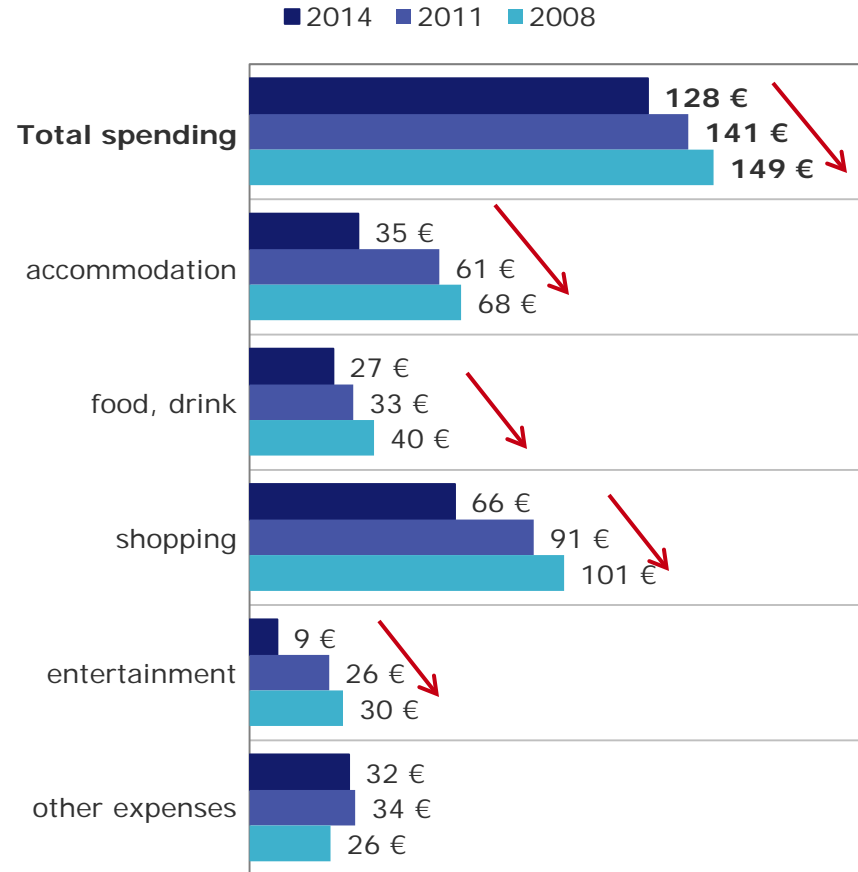


# Average spending per person per day

## Spending has decreased somewhat



Average spending per person per day in EURO



# 7

## 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



- 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)



<b>NUMBER OF ACCOMMODATED FOREIGN TOURISTS, 2014 (Statistics Estonia)</b>					
	<b>2014 1st quarter</b>	<b>2014 2nd quarter</b>	<b>2014 3rd quarter</b>	<b>2014 4th quarter</b>	<b>TOTAL</b>
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	37990	98510	133096	58711	328307
<b>Total:</b>	<b>248314</b>	<b>391471</b>	<b>452823</b>	<b>319393</b>	<b>1 412 001</b>

<b>ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS TO TALLINN 2014, ACCOMMODATION (without cruise)</b>			
	<b>paid+free accommodation</b>	<b>1-day visitors</b>	<b>TOTAL</b>
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	404818	135660	540478
<b>Total:</b>	<b>1705841</b>	<b>1323294</b>	<b>3029135</b>

# Data weighting (3)



<b>ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS 2014, SEASONALITY (without cruise)</b>					
	<b>1st quarter</b>	<b>2nd quarter</b>	<b>3rd quarter</b>	<b>4th quarter</b>	<b>TOTAL</b>
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	62541	162173	219111	96653	540478
<b>Total:</b>	<b>550064</b>	<b>831004</b>	<b>940556</b>	<b>707511</b>	<b>3029135</b>

<b>Comparison of weighted and non-weighted samples, 2014, without cruise</b>						
	<b>Assessment of total population</b>	<b>% of total population</b>	<b>Weighted results</b>	<b>% of weighted sample</b>	<b>Non-weighted results</b>	<b>% of non-weighted sample</b>
Finland	1739203	57%	901	57%	401	26%
Sweden	86998	3%	45	3%	150	10%
Norway	42002	1%	22	1%	105	7%
United Kingdom	59257	2%	31	2%	159	10%
Germany	104427	3%	54	3%	217	14%
Russia	357900	12%	185	12%	225	14%
Latvia	98870	3%	51	3%	105	7%
Other countries	540478	18%	280	18%	207	13%
<b>Total:</b>	<b>3029135</b>	<b>100%</b>	<b>1569</b>	<b>100%</b>	<b>1569</b>	<b>100%</b>

# Appendix 3

## Project team



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

Client's contact person:	Karen Alamets, Kristina Lukk
Survey plan and report:	Annette Schultz
Sample design:	Katre Seema
Fieldwork coordination:	Marju Kalve
Data processing:	Aivar Felding
Graphics:	Grete Maria Vürst

### **Contact information**

Annette Schultz  
TNS Emor research specialist  
Phone: 626 8544  
E-mail: [annette.schultz@emor.ee](mailto:annette.schultz@emor.ee)

### **TNS Emor**

Phone: 626 8500  
Fax: 626 8501  
E-mail: [emor@emor.ee](mailto:emor@emor.ee)  
Address: A. H. Tammsaare tee 47, 11316 Tallinn



**TNS Emor**

Tallinn visitor survey 2014

© TNS

