Visitor pressure and events in an urban setting

City report – Tallinn, Estonia

2017

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Executive summary

In the past years, the topic of visitor pressure and over-tourism in city destinations has reached worldwide media coverage. Although, it is very difficult to ascertain how and when visitor pressure becomes too high, preventing it should be a priority to city governments. Support of local residents is a prerequisite for sustainable tourism development. This report provides an overview of the current situation concerning visitor pressure in the city of Tallinn, as well as possible solutions and actions to be taken.

The visitation of Tallinn increases year by year thus all the interviewed experts agreed that the problem of visitor pressure will not reduce but will increase in the near future. The number of visitors from international markets is continuously growing as well as the volume of cruise tourism.

Restoration works in the Old Town and its surroundings are in progress allowing the visitors and the residents to use the town in various ways. Traffic regulations are ongoing however; the works will probably last for a couple of years before it is completed. Development and revitalization of neighbourhoods outside of the touristic hot spots are also in progress just like the development of the coastal area.

Initiatives have been taken with regards to maximizing the economic benefits of tourism in connection to heritage protection, although such system is not in place yet. Communicating the financial and economic benefits of tourism towards the residents and creating wider awareness is also lacking.

The need for advanced use of ICT has also been mentioned, just like the potential of creating more walking and cycling routes and fostering more active cooperation between the residents and the industry players.

According to most of the interviewees MICE tourism will play a key role in the future. The number of venues and facilities is planned to be expanded in the upcoming years holding a lot of potential for Tallinn.

The city is continuously developing. The social and economic development is accompanied by the renewal of the cityscape. Besides new structures that are being built, heritage protection and maintenance has key importance. The city is getting more and more attractive and the range of touristic offers and products is increasing year by year. Nonetheless, this phenomenon has negative impacts as well. Touristification and rising costs of real estate and services are already visible in the Old Town. The visitation of the city is growing putting more and more pressure on the social, physical and economic environment. The problem has already been realized and acknowledged however; urgent steps need to be taken.

1. Introduction

The project “Visitor pressure and events in an urban setting’’ is a follow up study of a previous research conducted in large urban destinations. The current project Tallinn is participating in is focusing on smaller urban destinations and looks at the problem of over-tourism from the residents perspective.

The research was initiated by the Centre of Expertise Leisure, Tourism and Hospitality (CELTH) and was carried out by the two founding partners Stenden University (European Tourism Futures Institute) and NHTV University of Applied Sciences. The project ran between the March 2017 and December 2017.

The following chapters will discuss the main findings solely for the city of Tallinn. A total of 9 experts from different fields directly or indirectly related to tourism were interviewed and 108 responses were collected to a resident survey distributed with the help of Tallinn City Tourist Office & Convention Bureau.

This report must be seen as an attachment to the main report that contains the theoretical background, the methodology and approach, the scenarios for urban destinations as well as a cross case analysis that helps to benchmark between city destinations. In this individual report for the city of Tallinn the following questions will be answered:

- To what extent visitor pressure is visible in the city of Tallinn? – dimensions and implications
- How does the problem manifest itself or may do so in the future (spatial, economic and social implications)?
- Who are the key players involved in visitor management and how does the city deal with visitor pressure?
- How can Tallinn become future proof? - Future scenarios
- How can the recommended strategies for Tallinn be implemented?

2. Methodology

2.1 General study design

In order to get reliable results, a multi-method approach was used. To have a thorough understanding of visitor pressure and over-tourism and to learn more about the unique characteristics of urban tourism, extensive literature research was conducted. Besides the theoretical background, the context of the city of Tallinn was examined via reports, statistics, development plans and existing strategies. The desk research was followed by extensive field work. The field research consisted of two parts: expert interviews and a resident survey.

2.2 Expert interviews

A total of 9 semi-structured interviews were conducted with key industry players. The in-depth interviews were conducted face to face (7) and via Skype (2). The interviews were conducted in English, were recorded and later transcribed for analysis. A summary report was produced based on the information collected from the interviews. The report served as a basis for further analysis.

The interviewees were selected with the help of Tallinn City Tourist Office and Convention Bureau. For the selection of the interview participants, purposive sampling was applied.

From a list of key industry players members of the stakeholder groups below were selected:

- Destination Management Organizations
- Tourism related businesses (event organisers, hotels, catering establishments, tour operators, travel agencies)
- Transportation service providers
- Public sector (involved in spatial development, tourism management etc.)
- Tourist attractions (museums, heritage locations, art centres, exhibition/conference centres)
- Resident groups or representatives

The main topics covered during the interviews were the followings:

- Is visitor pressure a problem in Tallinn (or may become a problem in the future)?
- How does the problem manifest itself (or may do so in the future)?
- Governance of visitor pressure
- Strategies and methods of visitor management
- Future vision and developments

2.3 Interviewee profile

Name	City	Expertise	Organization/company
Liivi Soova	Tallinn	Member of the board	Estonian Folk Art and Craft Union
Külli Karing	Tallinn	Managing Director President Board Member	Hansa Estonia Ltd. Estonian Travel & Tourism Association Estonian Convention Bureau
Sirle Arro	Tallinn	Head of Marketing and Communication	Port of Tallinn
Boris Dubovik	Tallinn	Head of Division Member	National Heritage Protection Unit Tallinn Urban Planning Department/UNESCO Tallinn Old Town Management Committee
Eero Kangor	Tallinn	Chief Specialist	National Heritage Protection Unit Tallinn Urban Planning Department
Mark Sepp	Tallinn	Manager – research and development	Tallinn City Administrations
Evelin Tsirk	Tallinn	Head of Department	Tallinn City Tourist Office & Convention Bureau
Kristina Lukk	Tallinn	Analyst	Tallinn City Tourist Office & Convention Bureau
Jüri Kuuskemaa	Tallinn	Member Advisor to the Mayor of Tallinn	Society of the Tallinn Old Town UNESCO Tallinn Old Town Management Committee

Table 1. Interviewee profile

2.4 Resident survey

To be able to examine the relationship between the tourism industry and the local community the method of self-completion online questionnaire was chosen. In order to benchmark between the destinations of the previous and the current visitor pressure project the same questionnaire (with slight changes) was used in Tallinn as well. The questionnaire was translated to English, Estonian and Russian and was distributed online to a representative panel of residents across the city with the help of Tallinn City Tourist Office and Convention Bureau. A total of 108 responses were received.

2.5 Respondents profile

Based on the gender of the respondents, female inhabitants seemed to be more active. 66% of the respondents were female and 34% were male. The largest age group represented was people aged 35-54 years (52.2%), followed by the group of 15-34 years (27.8%).

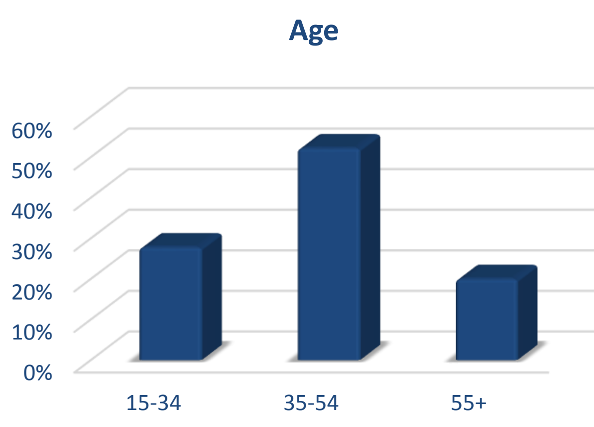

Figure 1. Age structure - resident survey

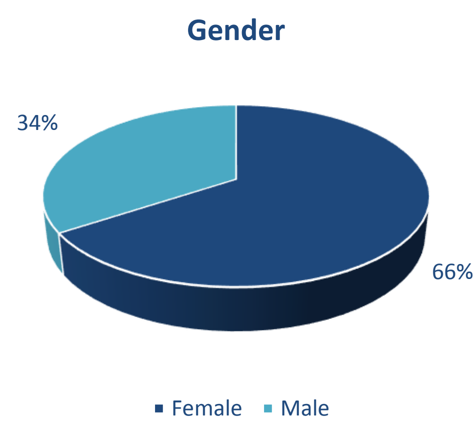

Figure 2. Gender - resident survey

As the map below shows, most responses came from the city centre/Kesklinn neighbourhood followed by the Pohja-Tallinn district. Visitor pressure is mostly visible in the city centre and specifically in the Old Town area thus the interest of citizens living in the central district is naturally higher in tourism related issues.

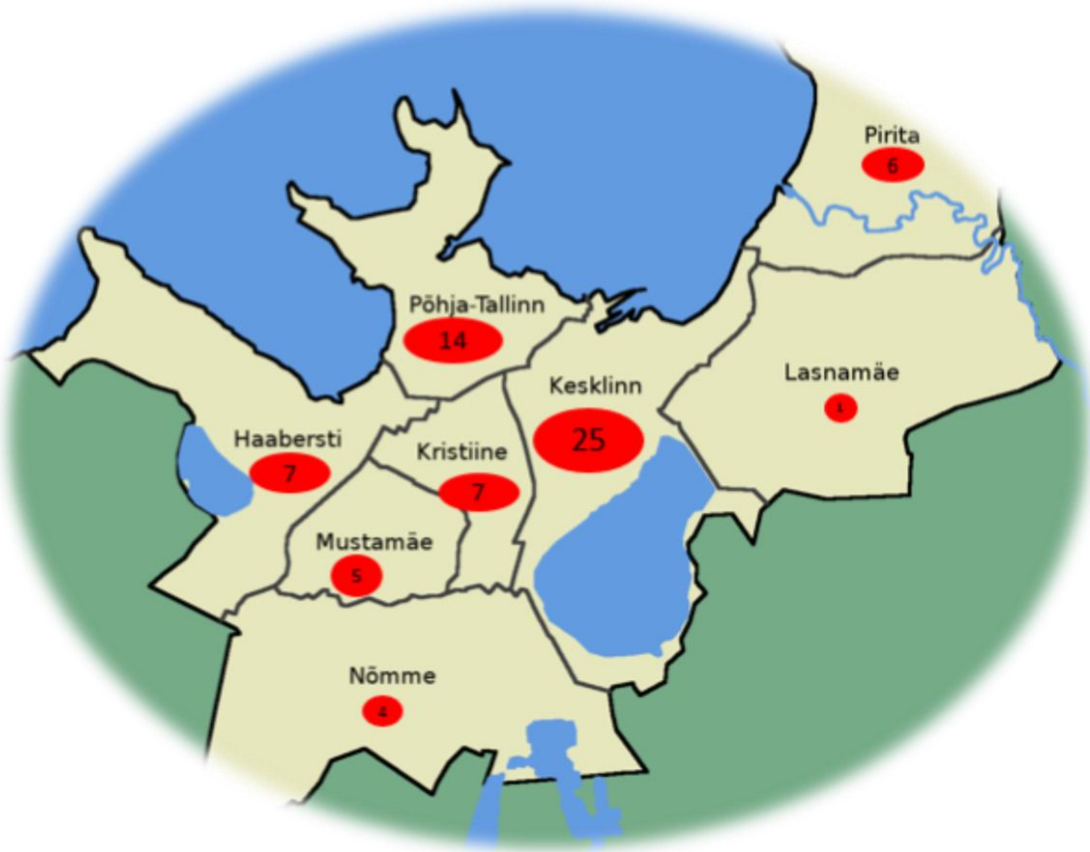

Figure 3. City map Tallinn - area of living (nr. of responses) - resident survey

Most of the respondents were born in Tallinn (49.1%) or moved to the city for family reasons (32.4%).

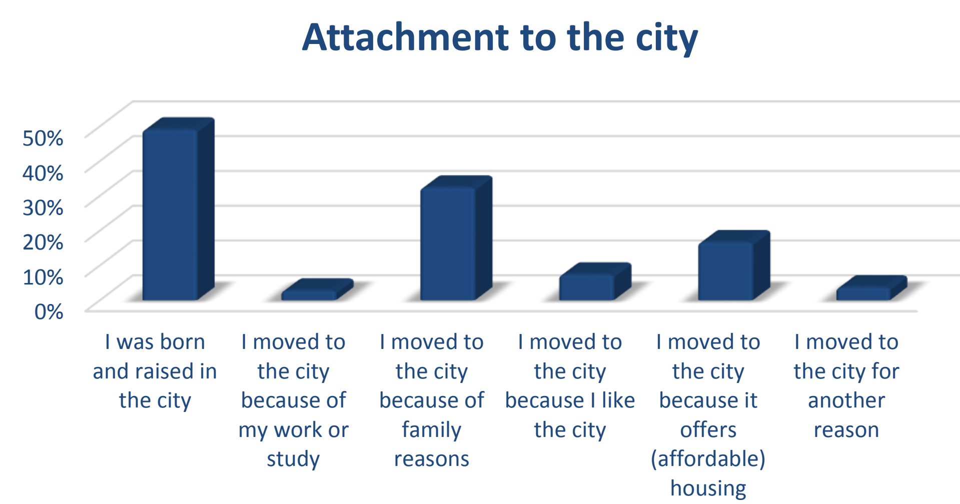

Figure 4. Attachment to the city - resident survey

The fact that almost half of the respondents were born and raised in the city may be the reason that most of the residents (94%) have been living in the city for one year or more.

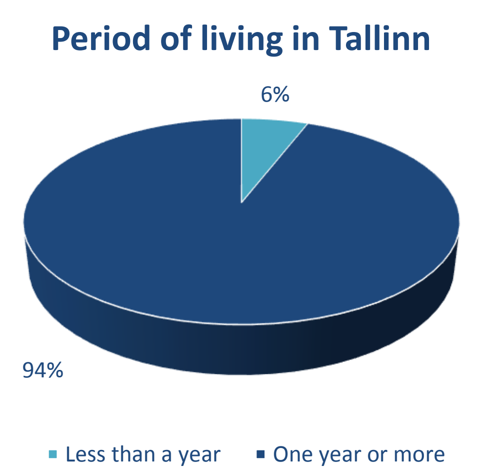

Figure 5. Period of living in the city - resident survey

Being a long-term inhabitant of the city may be a good indicator for the general identification of residents with the city of Tallinn. In general people are happy to be living in the city (M=4.34) and they feel they are a real "Tallinner'' (M=4.25).

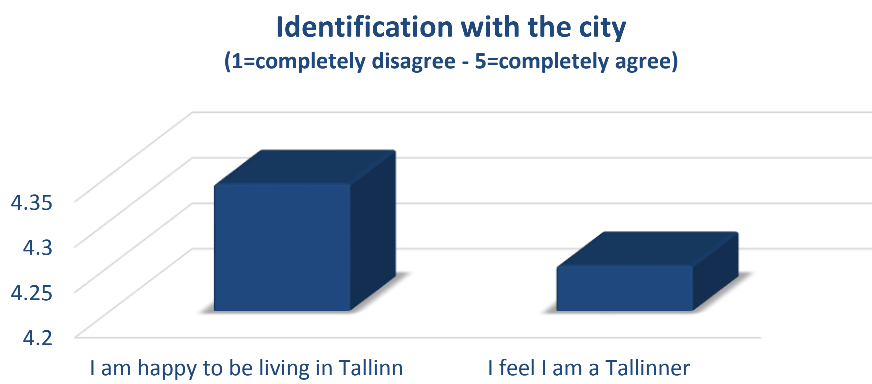

Figure 6. Identification with the city - resident survey

Most of the residents (87.80%) reported that they do not work in the tourism industry and their household income is not related to tourism (86.90%).

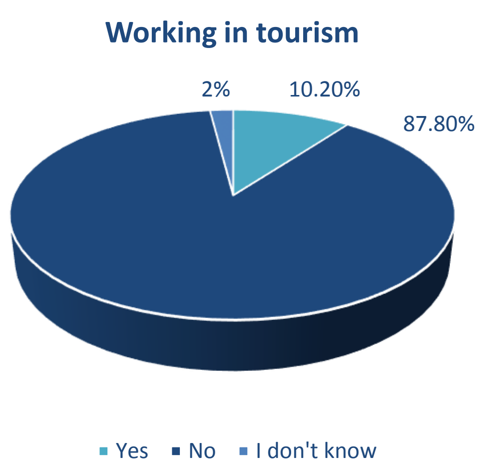

Figure 7. Working in tourism - resident survey

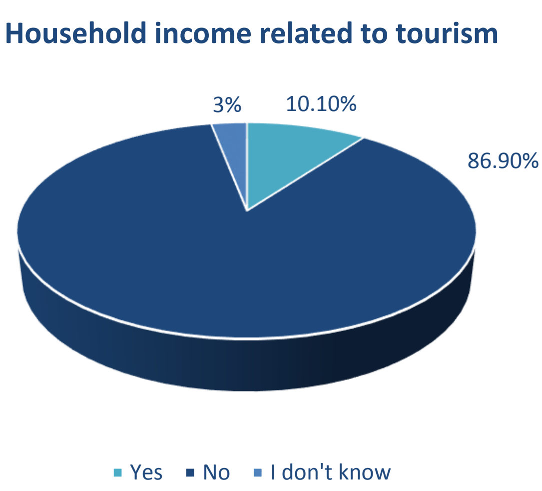

Figure 8. Household income related to tourism – resident survey

3. Viewpoints to tourism and visitor pressure in Tallinn

3.1 Introduction

This chapter contains information on the general views on whether visitor pressure is currently an issue in the city of Tallinn or not. We will discuss the underlying issues that make visitor pressure a problem and those issues that may become a problem in the future. The chapter first introduces the topic from the point of view of key industry players then provides insights into how it is perceived by the residents.

3.2 Dimensions of tourism and visitor pressure

The question whether visitor pressure currently is an issue in the city was answered in a slightly varied way. Experts do acknowledge that the number of visitors is increasing year by year however, those directly involved in tourism perceive visitor pressure as a more significant issue than others. It is agreed on, that the most pressure is on the historical city centre and that the issue is not visible throughout the whole year. Due to the specific layout and the narrow, medieval streets, congestion and overcrowding is one of the main issues the city is dealing with.

It was noted by all the experts that seasonality plays a key role. It was reported that the winter period is generally more quiet, however the Christmas holiday and the New Years' Eve celebrations attract large number of visitors, mainly from the neighbouring countries. It was highlighted that during the cruise season, at specific times of the day pressure becomes more visible in the historic centre. In general, events are seen as a potential tool to attract visitors in the shoulder months however, currently, events are not organized in a strategic way. Time-based rerouting throughout the day has also huge importance. Closer cooperation is necessary between the guides, tour operators and excursion organizers, mainly the ones serving the cruise ships.

It can be concluded that according to the experts the main problems are linked to cruise tourism and the large number of ferry passengers arriving into the Port of Tallinn. The three ferry lines serving Tallinn

(Tallinn-Helsinki, Tallinn-Stockholm, Tallinn-St Petersburg) account for the largest number of passengers. According to statistics, In 2016, the Port of Tallinn received a total of 10,173,297 passengers (Port of Tallinn, 2016). Approximately 8.5 million passengers arrived by ferry. The busiest ferry line is the Tallinn-Helsinki line. The cruise season is generally a bit longer than the main touristic season and can last till October. Tallinn receives 300+ cruise ships yearly.

It has to be noted, that while cruise tourism is constantly growing (including the arrivals by ferry) other segments are also increasing placing pressure on the city.

According to experts, other major problems are related to infrastructure, accessibility, length of the main season as well as the lack of efficient strategies for managing visitor flows.

Infrastructure problems have been emphasized by most of the stakeholders. The Old Town area is located very close to the Port of Tallinn. The Port is handling large amount of traffic in a rather small area. Ferries, cruise ships, cars, trailers, tourist buses all make use of the port and the surrounding areas causing congestion problems. A master plan has been created for the development of the Port area. The plan is expected to be ready by the end of 2017. Given the high number of passengers arriving by ferry or cruise ships, It was highlighted that connections between the Port and the Old Town has become an issue. In the peak season, the Port receives approximately 25.000 ferry passengers and 10.000 cruise passengers per day. Transportation of these visitors are often done by coaches. It was mentioned that the city is lacking adequate coach parking facilities and drop off zones.

Most of the cruise passengers are first time visitors. Their visit is concentrated on a very short period of time (mostly between 9.00 and 13.00). Due to the first time visit, most of the passengers are interested in the touristic hotspots. It was reported that on the busiest days residents tend to leave the Old Town.

Another issue mentioned by most of the experts is the concentration of entertainment facilities around the same corner of the Old Town. Bars, Pubs and clubs located in the same area contribute to significant noise pollution.

3.3 Implications of tourism and visitor pressure

The resident survey revealed that at this stage, locals do not consider visitor pressure and over-tourism a significant issue. As it can be seen from the graph below, the opinion of locals about visitors in Tallinn is rather positive (M=3.72). There is a slight difference between the perceived impact of visitors themselves and tourism in general. Opinion about tourism (M=3.59) was slightly less positive. Sense of attachment with the city (M=3.65) and personal identity (M=3.69) as being a Tallinner also scored high.

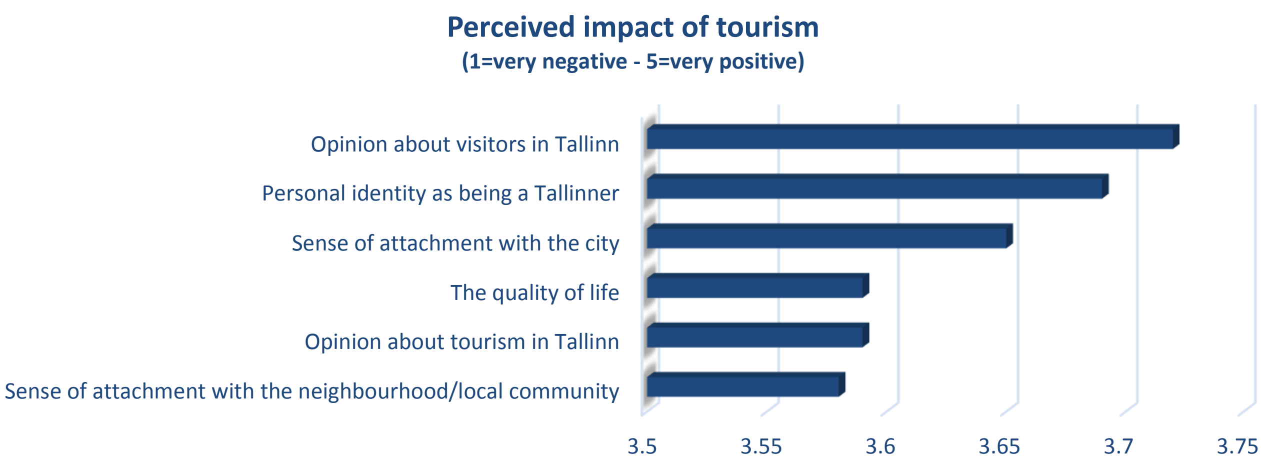

Figure 9. Perceived impact of tourism - resident survey

The attitude of residents towards tourism is also on the positive side. 87.1% of the respondents said (agree & completely agree) that they are proud that people from different parts of the world visit Tallinn and they think Tallinn is a hospitable city (77.3%). Answers to the question whether people from Tallinn are hospitable were a bit more evenly distributed, although the majority agreed or completely agreed that Tallinners are welcoming (55%). Answers to the question whether the neighborhood of the respondents is too touristy also showed even distribution and residents did not clearly agree or disagree.

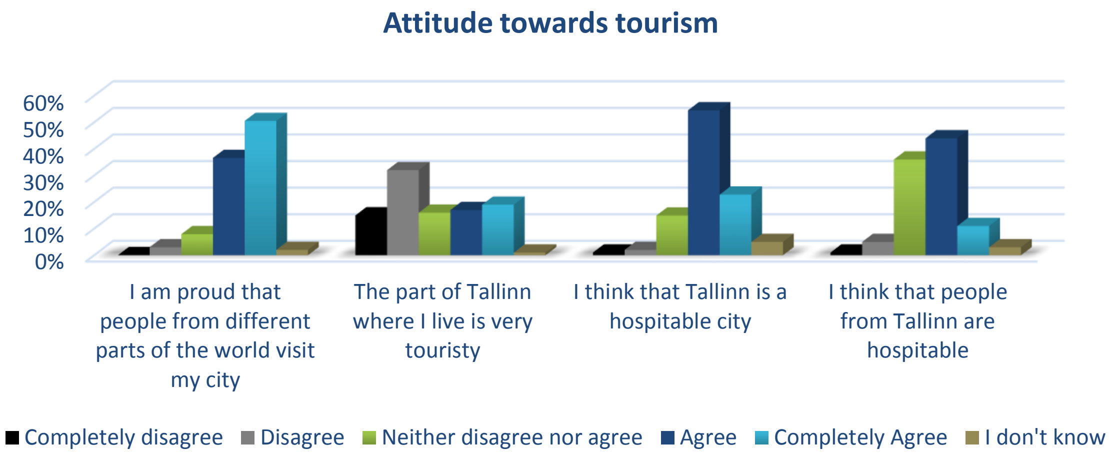

Figure 10. Attitude towards tourism - resident survey

It can be concluded that residents have a positive attitude towards tourism and visitors in general. This might be the result of not having experienced significant negative impacts in the past years. As it can be seen from the graph below, most of the residents did not experience serious drawbacks in the past 3 years (47.2%), however, in case the pressure gets too high, they would avoid specific places (39.8%) (this practice can already be seen). More drastic behavioral responses such as moving to another place in the city or leaving the city itself scored low amongst the respondents.

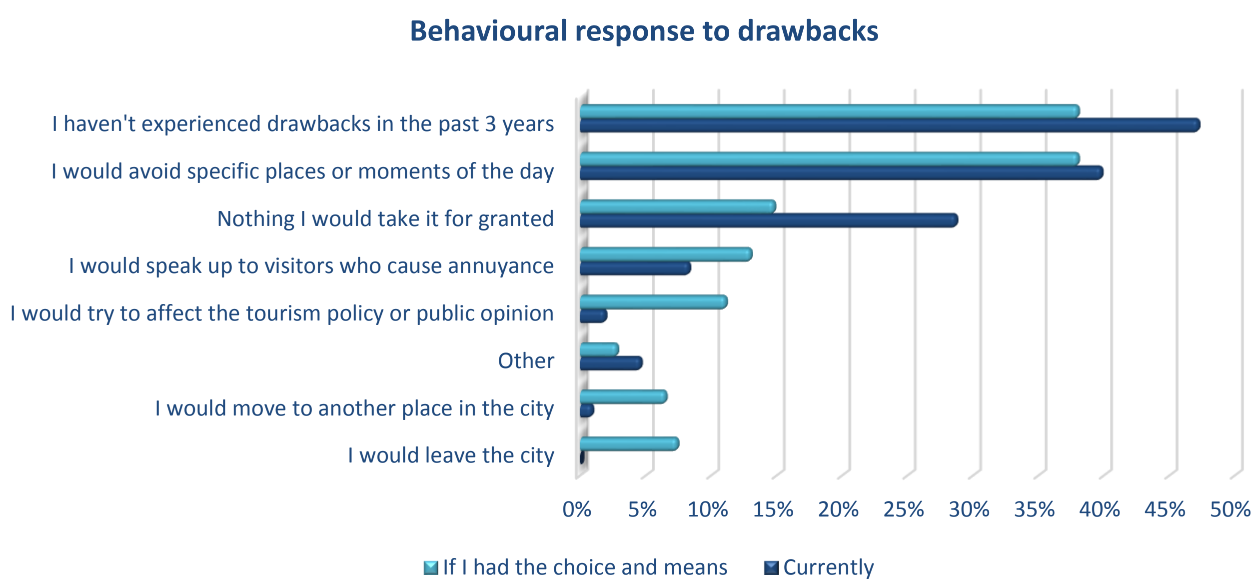

Figure 11. Behavioral response to drawbacks - resident survey

Residents were asked to write down the first two words that comes to their mind when they think of visitors in Tallinn. The word-cloud shows the words mentioned by the respondents. The bigger the word the more times it appeared. The word “Finns” referring to the Finnish visitors was mentioned the most often followed by “tourists” and “Old Town”. The citizens equally used negative and positive terms.

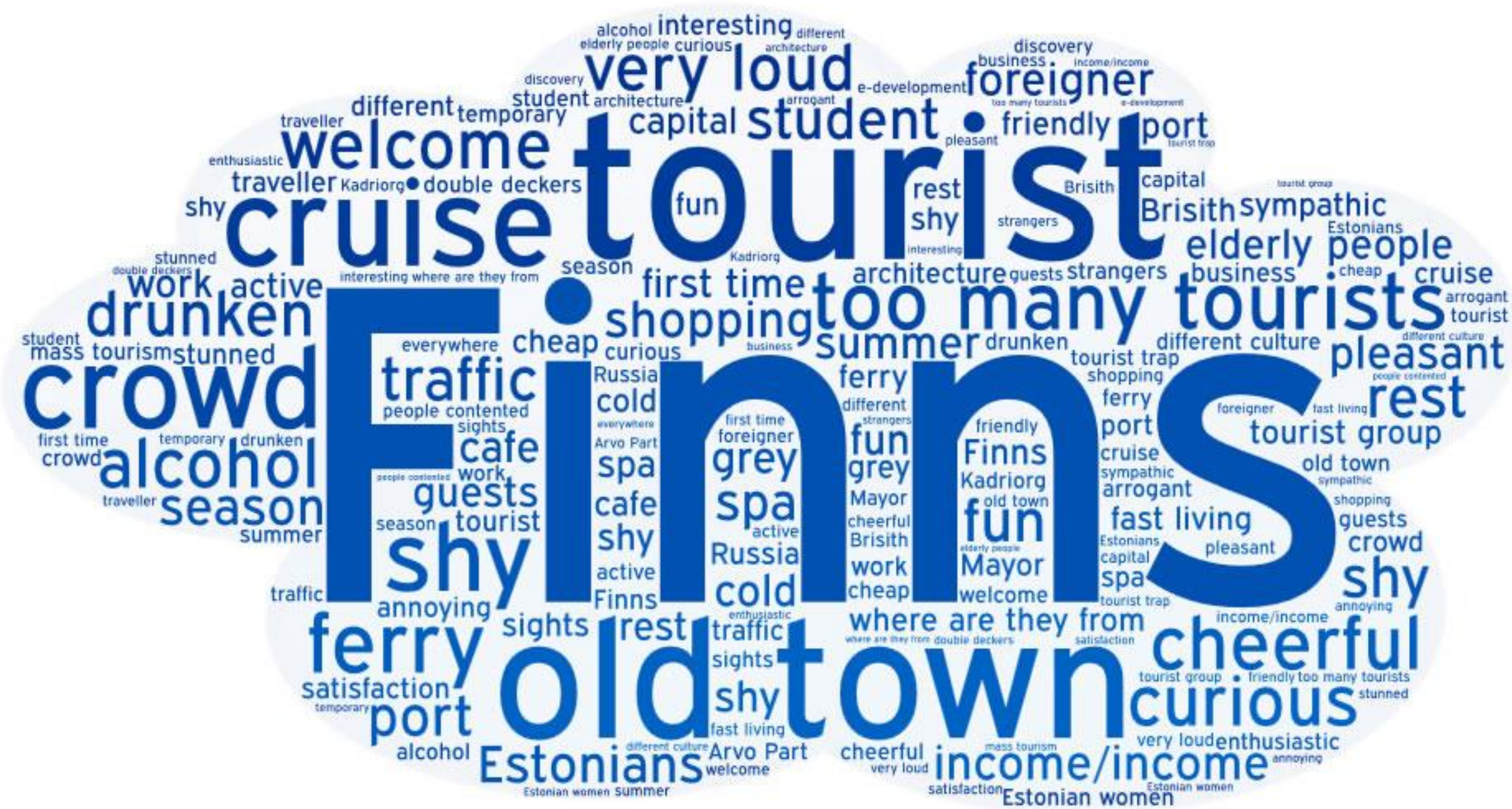

Figure 12. Word-cloud-Words residents think of when it comes to visitors in Tallinn - resident survey

4. Implications of tourism and visitor pressure in Tallinn

4.1 Introduction

This chapter will provide in-depth analysis of how visitor pressure manifest itself in the city, what the spatial, economic and social implications of tourism development are and how it is perceived by experts and residents. To provide a glimpse, the graph below shows that in general positive encounters outweigh the negative encounters in the eye of the residents. he negative encounters in case of the stakeholder domain were excluded on purpose. The rest of the chapter will go more into details and discuss each domain separately.

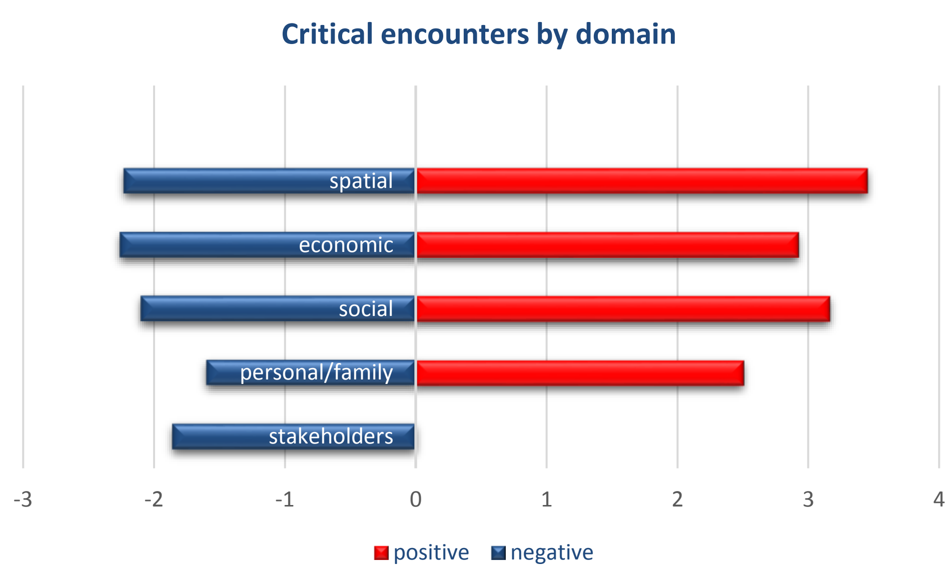

Figure 13. Critical encounters by domain – resident survey

4.2 Spatial implications

Tourism in Tallinn is concentrated in the Old Town. It was reported by experts that in order to protect the UNESCO world heritage site and to ensure a peaceful living environment for the residents of the historical town centre the main goal is to make the Old Town completely car free. The Old Town itself is under UNESCO and national heritage protection that makes the development of the historical centre even more complicated.

It was mentioned by some of the interviewees that directional signage in the city centre is adequate however it needs some improvement in the harbour area. Concerning the facilities, according to some interviewees the area is currently lacking certain public facilities e.g. public toilets.

Experts also stated that in general tourists do not have large impact on public transportation. Tourist groups normally travel by chartered coaches that leads to a rather serious issue when it comes to drop off points and coach parking. The city is currently lacking a suitable parking lot for coaches and the drop off points should also be reconsidered. Parking in general is expensive in Tallinn.

According to the residents, positive spatial impacts of tourism development and visitors outweigh the negative impacts. Respondents were most positive about the restoration of traditional architecture (M=3.81), protection of historical parts of the city (M=3.68) and the events organized (M=3.52). Amongst the negative impacts, overcrowding of sidewalks as well as restaurants, shops and leisure facilities and pollution/littering/noise (M=2.32) scored the highest.

(scale: 1=neutral to 5=very positive)

Positive direct encounters (n=85-91)		**Mean**
Spatial	Restoration of traditional architecture	3.81
	Protection of historical parts of the city	3.68
	More events	3.52
	More leisure facilities	3.45
	Better infrastructure	3.13
	More shops	3.11

Table 2. Positive spatial direct encounters – resident survey

(scale: 1=neutral to 5=very negative)

Negative direct encounters (n=80-89)		**Mean**
Spatial	Overcrowding/obstruction of streets/side walks	2.62
	Overcrowding of shops/restaurants/leisure facilities	2.35
	Pollution/littering/noise	2.32
	Tourists on bicycles/Segways	2.20
	A loss of diversity on the high-street	2.11
	Overcrowding of public transportation	2.11
	Change of appearance of neighbourhood/loss of authenticity	1.93

Table 3. Negative spatial direct encounters – resident survey

4.3 Economic implications

Tallinn is continuously developing and being refreshed. It is however not seen as a result of tourism development but rather the other way around. Due to the uplifting of certain neighbourhoods visitors started to discover areas outside of the main touristic hot spots bringing money into these areas and contributing towards further development. Good examples are the Kalamaja area, the seaplane harbour and the coastline, Kadriorg and Pirita, Rocca al Mare and Nomme. Some of the buildings from the Soviet era are still in bad condition, however, there are numerous ongoing development and restoration projects in the city.

Despite of the opportunities to reduce the pressure on the Old Town by redirecting the visitors towards the suburbs, no real incentives have been developed. It was argued by most of the experts that more intensive marketing and promotion is needed in order to create awareness. The extension of the average length of stay has also high importance. It would provide the chance for visitors (specifically first time) to discover other areas as well.

The positive economic impacts of tourism have been recognized and acknowledged by all the interviewees. Tourists do not only bring revenue to the city but there presence also contributes towards the quality of life. Whether the economic impacts have been maximized is perceived in a varied way by the interviewed experts.

Heritage protection is a key area that requires large amount of money for the renovation, restoration and maintenance of the buildings in the protection zone. It was argued that tourism should contribute more towards heritage protection. The introduction of price mechanisms has been raised such as tourist taxes or taxing the cruise ships and coaches, however no such system is in place yet. The negative impact of cruise tourism is perceived rather strongly by most of the interviewees, however, the direct, indirect and induced economic impacts of the Port of Tallinn have also been acknowledged.

The sharing economy and more specifically Airbnb exists in Tallinn as well. Purchasing apartments for renting it out later is a common trend in the centre of the city and mainly in the Old Town. This activity generates mixed feelings amongst the residents. Some of these apartments are empty most of the time and used only for short stays. Noise problems are also reported in connection to Airbnb guests. In case of the properties owned by foreigners, bills are often neglected and not paid on time. Strict regulations are needed.

It was mentioned by the stakeholders that the tendency of rising rental prices and real estate value is visible in the Old Town, although, it is not solely the result of tourism development in the city. In the past couple of years relocation of residents, businesses as well as state departments could be seen. Some of the residents decided to leave the area due to strict regulations with regards to the pedestrian zone in the Old Town.

The traditional Estonian handicraft stores are also facing difficulties. Due to the size of the Old Town there are only a few spots that guarantee high visitation and revenue for the shops. These spots are often too expensive or taken by souvenir stores. Some of the handicraft stores did have to relocate outside the central zone where they face the risk of low demand and lack of revenue.

The relocation of ministries and state departments can also be observed, nonetheless, by redeveloping and renovating these former state buildings new residential apartments can be built and the Old town can attract more residents. The seaside area is also being redeveloped and opened for residents, businesses and visitors. Many of the new businesses are established in this area.

Just like in case of the spatial implications, in the resident survey positive economic encounters scored higher than the negative ones. Greater number of tourist accommodation (M=3.38), more seasonal jobs (M=3.27) and economic development (M=2.89) are seen as a positive outcome of tourism. However, the increase of price level/affordability of restaurants, cafes, shops, leisure facilities, rental houses and private homes are seen as the most significant negative economic impacts.

(scale: 1=neutral to 5=very positive)

Positive direct encounters (n=65-81)		**Mean**
Economic	Greater number of tourist accommodation	3.38
	More seasonal jobs in tourism	3.27
	Economic development of my neighbourhood	2.89
	More permanent jobs in tourism	2.83
	More jobs outside tourism	2.76
	Increase of price level of real estate	2.71
	Wealth of residents	2.65

Table 4. Positive economic direct encounters – resident survey

(scale: 1=neutral to 5=very negative)

Negative direct encounter (n=55-93)		**Mean**
Economic	Increase of price level/affordability of restaurants and cafes	3.16
	Increase of price level/affordability of shops	3.04
	Increase of price level/affordability of leisure facilities	2.84
	Increase of price level/affordability of rental houses	2.69
	Increase of price level/affordability of private houses	2.57
	Big events causing peak moments of crowding	2.05
	Increase of price level/affordability of taxis	2.04
	Increase of seasonal/migrant workers	2.03
	Decrease of permanent jobs	1.91
	Decrease of seasonal jobs	1.88
	Increase of businesses	1.74
	Increase of tourist accommodations	1.72
	Increase of price level/affordability of public transportation	1.67

Table 5. Negative economic direct encounters – resident survey

4.4 Social and personal implications

It was stated by experts that touristification of the historic centre is getting more and more visible. The number of shops and restaurants that cater mainly for tourists has increased. The number of souvenir stores has risen significantly as well as the number of restaurants targeting tourists. Because of this tendency residents of the Old Town have less and less opportunities to shop in their own neighbourhood. Residents often opt for restaurants located outside of the central area in the main season and tend not to return to the restaurants located in the touristic hot spots in the winter season.

Due to seasonality, demand is not balanced throughout the year. Businesses focusing on tourists often close down in the winter season. This trend results in difference in quality and service standards in the peak and the shoulder months.

Concerning the impacts of tourists on safety and security, the stakeholders reported that crime and vandalism did not increase in the city due to tourism development. Tourists often become the target of thieves or pickpockets but the situation is not worse than anywhere else in the world. It was argued by some of the experts that presence of the local police is not adequate and tourists often do not have the means to report to the police and most of these cases remain unknown for the local authorities.

Another issue often raised was the high concentration of entertainment facilities in the same area within the Old Town. These bars and clubs are mainly visited by locals. Noise is one of the main concerns mentioned.

The lack of qualified tour guides is also seen as an issue. In the summer months due to high demand, there is lack of certified guides. In the peak months, guides without licences and students who speak one or two languages fluently are often employed as guides. This practice is harmful. Education and strict regulations are needed.

According to the surveys, residents ranked "more cultural supply" (M=3.57) the highest amongst the positive direct social encounters, followed by "greater international touch'' (M=3.55) and "revitalization of local arts and events'' (M=3.54). Amongst the negative implications "misbehaviour of visitors'' (M=2.63) was ranked the highest, followed by "commercialization of residents' hospitality" (M=2.18).

(scale: 1=neutral to 5=very positive)

Positive direct encounters (n=87-94)		**Mean**
Social	More cultural supply	3.57
	Greater international touch	3.55
	Revitalizations of local arts and events	3.54
	More positive image	3.40
	More opportunities to share culture with visitors	3.34
	Increased liveliness	3.22
	Improvement of social/cultural life	3.22
	Increase of community's pride	3.00
	Better liveability	2.82
	Change in the composition of the population	2.80
	Better understanding of other people	2.71
	Growth of the population	2.71

Table 6. Positive social direct encounters – resident survey

(scale: 1=neutral to 5=very negative)

Negative direct encounters (n=60-77)		**Mean**
Social	Misbehaviour of visitors	2.63
	Commercialisation of residents hospitality	2.18
	Attitude of visitors	2.14
	Less housing for residents	1.90
	Change/loss of culture/lifestyle/local customs	1.64

Table 7. Negative social direct encounters – resident survey

Residents were asked to evaluate the positive and negative Impacts of visitors on their personal life as well. The tables show the indirect encounters in order of their ranking. The most highly ranked positive personal encounters are "greater personal pride (M=3.04), "more pleasant contacts with visitors'' (M=3.02), "improvement of my understanding of other people/visitors'' (M=2.72). The most highly ranked negative personal encounters are "waiting time in shops/facilities" (M=2.06), "it frequently takes me extra time to go to work" (M=1.66), and "my safety/comfort is frequently violated'' (M=1.61).

(scale: 1=neutral to 5=very positive)

Positive personal encounters (n=67-92)		**Mean**
Positive personal encounters	Greater personal pride of the city	3.04
	More pleasant contacts with visitors	3.02
	Improvement of my understanding of other people/ visitors	2.72
	Improvement of my language skills	2.71
	Improvement of my attitude towards other people/visitors	2.70
	A nicer/better job	2.17
	Improvement of my educational level	2.11
	Improvement of my housing conditions	2.03
	Improvement of the family income	1.99

Table 8. Positive indirect encounters – resident survey

(scale: 1=neutral to 5=very negative)

Negative personal encounters (n=55-78)		**Mean**
Negative personal encounters	Waiting time in shops/facilities	2.06
	It frequently takes me extra time to go to work	1.66
	MY safety/comfort is frequently violated	1.61
	My privacy is frequently violated/infringed	1.60
	Obstruction of my daily schedule/planning	1.52
	My social and cultural life is frequently infringed	1.46
	I experience unfair competition on the accommodation market	1.33
	My family life is frequently infringed	1.32

Table 9. Negative indirect encounters – resident survey

5. Governing and managing tourism and visitor pressure

According to the opinion of the interviewed experts, the Visit Tallinn 2017-2020 strategy is aligned with other city development plans. It was emphasized that the tourism strategy is based on the National Tourism Development Plan and the Tallinn Development Plan. The main party involved in tourism related decision-making processes is the Tallinn City Tourist Office and Convention Bureau.

It was mentioned that there are a number of associations that act as umbrella organizations and represent specific sectors. It was agreed on, that in general there is close cooperation between the tourism sector and other stakeholders.

However, certain issues have been raised by the stakeholders such as lack of adequate strategies and methods to deal with problems and lack of smart technology in planning and development. It was argued that experts should have initiatives on their own fields. The initiatives should be implemented via a central coordination system that is currently lacking.

It was revealed that in general the citizens are not consulted when it comes to tourism planning and development. Based on the opinion of some of the experts, the citizens tend to be more active when it comes to city planning, developments and construction works. This is justified by the low response rate of Tallinn citizens to the resident survey distributed in the framework of this project.

5.1 Stakeholder implications

Residents were asked to evaluate their personal experience with the attitude/actions/plans of different stakeholder groups on a Likert scale ranging from neutral to very negative. “Attitude of taxi drivers’’ got the least positive feedback (M=2.02) followed by “attitude of other residents towards visitors” (M=1.97). The “attitude of tour guides’’ (M=1.73) got the least negative ranking.

(scale: 1=neutral to 5=very negative)

Stakeholder encounters (n=55-66)		**Mean**
Stakeholder encounters	Attitude of taxi drivers	2.02
	Attitude of other residents towards visitors	1.97
	Attitude of tour operators	1.92
	Attitude/tourism plans of the government	1.86
	Attitude/plans of tourism marketing/promotion organizations	1.78
	Attitude of owners/managers of tourist accommodations	1.75
	Attitude of tour guides	1.73

Table 10. Stakeholder encounters – resident survey

5.2 Current approach in dealing with visitor pressure

The main initiative mentioned by most of the experts is the Tallinn City Card. It is a great tool to provide easy access to attractions including public transportation. However, the Tourist Office is facing difficulties in connection to spreading the visitors. Most of the arrivals are first time visitors thus they are mainly interested in the must see attractions. Furthermore, cruise passengers, besides being first time visitors, have only a very short time to visit the city, thus their itineraries are focused on the Old Town. Stimulating the itinerary of visitors and redirecting them to different parts of the city could work mainly with repeat visitors, specifically the Finnish market, who have already visited the main sites and are interested in alternative routes.

Time-based rerouting has a key importance; however, it seems to be very difficult to deal with seasonality. The cruise season is very short and it is extremely hard to extend it due to the weather conditions (the Baltic Sea gets rough in the winter and autumn period). In general, events are seen as potential tools to attract visitors in the shoulder months. The key industry players are continuously working on it, and their efforts are well represented by the fact, that in the past couple of years, the season got longer and now it lasts from May until September. The MICE segment is seen as a key segment as well as cultural events and festivals to attract visitors outside the peak season.

Time-based rerouting throughout the day has also a huge importance. Closer cooperation is necessary between the guides, tour operators and excursion organizers, mainly the ones serving the cruise ships, concerning the itineraries of the groups. Tours should start in different areas and at various times and then move towards the Old Town. There have already been a few initiatives such as alternative walking tours or cycling tours offered to cruise passengers.

Concerning information provision, the Tourist Office operates a website that contains all the information with regards to visiting the city. The "near me'' option helps visitors to find attractions close by. The website, however, can only be accessed via Wi-Fi or internet. The Tourist Information Centre serves as the main contact point for visitors. No application with real time data is currently used or being promoted although, for instance https://soiduplaan.tallinn.ee/#bus/en is an application (in multiple languages) that provides real time data on arrival and departure times for public transportation. 3D videos of the city are also available and QR codes are placed on certain attractions. There is also an application that has been developed by locals. Residents can tell their stories about the buildings and sites of the Old Town (http://snippetguide.com/#primary). Tallinn is featured on www.likealocalguide.com as well where locals offer their insights and services as local guides. However, this is not featured on the Visit Tallinn website. Currently there is no ambassador program that residents could be involved in to promote their city.

According to the interviewees, in general, benefits are not so visible for the residents. The Tourist Office does not have the right means at the moment to engage and communicate with the residents. Currently there are no reliable statistics on how many people are employed in the tourism sector. The economic impact of tourism in the city of Tallinn is not measured either. The contribution of tourism to the GDP is only measured on a national level thus, estimations on city level are hard to make. The impacts of cruise tourism around the Baltic Sea has been measured earlier, however it is hard to draw conclusions and communicate this in a clear and simple manner towards the residents. Due to lack of data and communications, the residents lack awareness concerning the benefits of tourism.

City experiences are primarily organized for the residents. There are no specific events that are marketed only for tourists. The Handicraft Union mainly focuses on the residents as well and is eager to provide valuable experiences that may also be interesting for visitors. The festivals such as the Flower festival, the Tower festival, the Old Town festival and the Light festival and the concerts are mainly for the local audience however these events attract both visitors and locals. Events in general are used as promotional material. Most of the events are organized in the city centre or in the Pirita area.

The tourist office does engage and communicates with the visitors. A survey is conducted every year. The Tourist Office is also active on Social Media. A new online chat function has been recently introduced where visitors can ask questions. The Tourist Information Centre located in the Old Town is an ideal place for face-to-face communications. It was acknowledged by some of the experts that educating the visitors is a vital part of the travel experience just like engaging with the locals.

6. Strategic outlook

6.1 Introduction

The following chapter will provide a glimpse into the future of Tallinn as an urban tourism destination. First of all, the direction the city of Tallinn should take concerning tourism development will be discussed from the point of view of industry stakeholders and residents. Furthermore, possible future scenarios will be presented and the place of Tallinn in the plausible scenarios will be discussed. After having defined a potential future scenario for the city, possible strategies will be presented together with recommendations for actual steps and actions to be taken.

6.2 Future vision on tourism development

It was agreed on by the experts that the tourism industry of Tallinn is expanding and visitor numbers are continuously growing. It was argued that attracting the right type of visitors has key importance. By restoring the Old Town and renewing the coastline together with some of the suburban areas the city intends to extend the range of tourism products currently offered and to create a much better, liveable space for both visitors and locals.

It was mentioned, that spreading the visitors would be a potential idea, however it may only work in case of repeat visitors. The extension of the average length of stay has also high importance and it would provide the chance for visitors to discover other areas as well during their stay.

It was mentioned by some of the experts that special theme tours should be promoted more intensively in the future. Based on the common historical background with Germany and Sweden, special theme tours could be developed and promoted to German and Swedish tourists. It was widely agreed that there should be more focus on niche tourists. In the medieval times, Tallinn was part of the Hanseatic route together with Lubeck, Riga, Hamburg, Rostock etc. The Hanseatic route could be recreated and Tallinn could attract more visitors interested in history. The authentic local life style should also be communicated more intensively including gastronomy and handicrafts. These tourism products may serve as alternatives to mass tourism.

Infrastructure developments are on-going in the city just like traffic regulations. Experts hope that an improved infrastructure and traffic scheme will help to better manage visitor flows as well as local traffic problems.

Increasing the economic benefits of tourism are also desirable on the long run. Experts mentioned that larger contribution of the tourism industry towards heritage protection is expected and would be necessary.

MICE tourism is expected to play a key role in the future. The number of venues and facilities are planned to be expanded in the upcoming years. The advanced use of ICT has also been mentioned, just like the need for more walking and cycling routes and more active cooperation between the residents and the industry players.

In general, it can be concluded that attitude towards further growth in the city is positive. Just like the industry experts, residents are also supportive towards further growth. The graphs below show that more than half of the respondents believe that there should be no boundaries to growth of visitor numbers in Tallinn (57.4%) and that there is room for numbers to grow (45.4%).

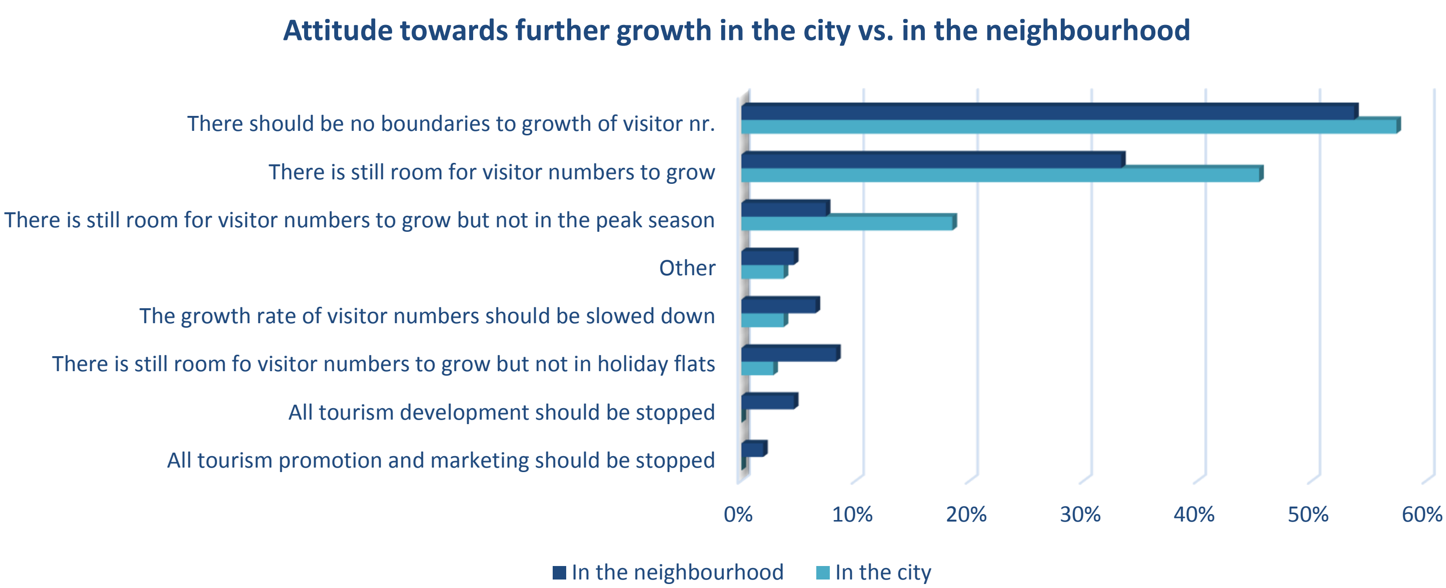

Figure 14. Attitude towards further growth in the city vs. in the neighborhood – resident survey

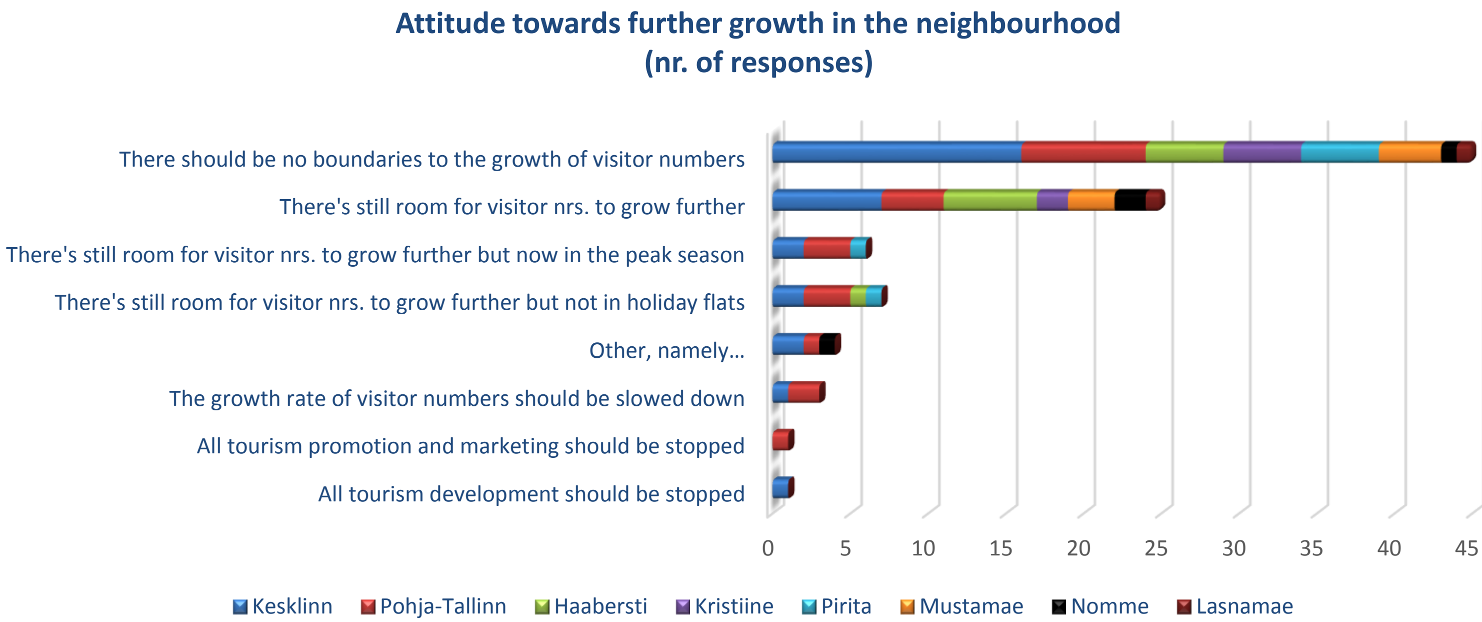

Figure 15. Attitude towards further growth in the neighborhood - resident survey

6.3 Visitor management strategies and community support

Based on the desk research, expert interviews, observations and the resident survey the following strategies are recommended for consideration.

As the graph below shows, residents are in less favour of applying hard strategies such as strict rules and regulations to manage visitor flows. Improvements to the infrastructure and facilities is seen as the most favourable strategy amongst the residents (70.1%).

Figure 16. Preference for visitor management strategies - resident survey

7. References

Port of Tallinn. (2016). *Port of Tallinn*. Retrieved from Key figures: http://www.portoftallinn.com/key-figures

8. Appendix

8.1 Descriptive statistics - tables

Age structure (n=90)	N.	%	Std.
15-34	25	27.8%	.690
35-54	47	52.2%	
55+	18	20%	

Gender (n=99)	N.	%	Std.
Female	65	65.7%	.477
Male	34	34.3%	

Location of work (n=95)	N.	%	Std.
Inside the city	80	84.2%	.367
Outside the city	15	15.8%	

Working in tourism (n=98)	N.	%	Std.
Yes	10	10.2%	.342
No	86	87.8%	
I don't know	2	2%	

Household income related to tourism (n=99)	N.	%	Std.
Yes	10	10.1%	.357
No	86	86.9%	
I don't know	3	3%	

Period of living in the city (n=102)	N.	%	Std.
Less than one year	6	5.9%	.236
One year or more	96	94.1%	

Attachment to the city (n=108)	I was born and raised in the city	I moved to the city because of my work or study	I moved to the city because of family reasons	I moved to the city because I like the city	I moved to the city because it offers (affordable) housing	I moved to the city for another reason
N.	53	3	35	8	18	4
%	49.1%	2.8%	32.4%	7.4%	16.7%	3.7%

Identification with the city (n=108)	Completely disagree		Disagree		Neither disagree nor agree		Agree		Completely agree		I don't know		Mean
	N.	%	N.	%	N.	%	N.	%	N.	%	N.	%	
I am happy to be living in Tallinn	1	1%	1	1%	10	10%	39	39%	49	49%	0	0	4.34
I feel I am a Tallinner	0	0%	0	0%	19	20%	34	35.8%	41	43.2%	1	1.1%	4.23

Behavioural response to drawbacks currently (n=108)	I have not experienced drawbacks in the past 3 years	Nothing I would take it for granted	I would avoid specific places or moments of the day	I would speak up to visitors who cause annoyance	I would try to affect the tourism policy or the public opinion	I would move to another place in the city	Other
N.	51	31	43	9	2	1	5
%	47.2%	28.7%	39.8%	8.3%	1.9%	0.9%	4.6%

Behavioural response to drawbacks if I would have choice and the means(n=108)	I have not experienced drawbacks in the past 3 years	Nothing I would take it for granted	I would avoid specific places or moments of the day	I would speak up to visitors who cause annoyance	I would try to affect the tourism policy or the public opinion	I would move to another place in the city	I would leave the city	Other
N.	41	16	41	14	12	7	8	3
%	38%	14.8%	38%	13%	11.1%	6.5%	7.4%	2.8%

Attitude towards tourism (n=108)	Completely disagree		Disagree		Neither disagree nor agree		Agree		Completely agree		I don't know		Mean
	N.	%	N.	%	N.	%	N.	%	N.	%	N.	%	
I am proud that people from different parts of the world visit my city	0	0%	3	3%	8	7.9%	37	36.6%	51	50.5%	2	2%	4.37
The part of Tallinn where I live is very touristy	15	15%	32	32%	16	16%	17	17%	19	19%	1	1%	2.93

I think that Tallinn is a hospitable city	1	1%	2	2%	15	14.9%	55	54.5%	23	22.8%	5	5%	4.01
I think that people from Tallinn are hospitable	1	1%	5	5%	36	36%	44	44%	11	11%	3	3%	3.61

Perceived impact of tourism (n=98)	Very negatively		Negatively		Neutral		Positively		Very positively		I don't know		Mean
	N.	%	N.	%	N.	%	N.	%	N.	%	N.	%	
The quality of your life	1	1%	4	4.1%	61	62.2%	11	11.2%	10	10.2%	11	11.2%	3.29
Your sense of attachment with the city	1	1%	4	4.1%	51	52%	20	20.4%	16	16.3%	6	6.1%	3.50
Your sense of attachment with the neighbourhood/ local community	1	1%	4	4.1%	56	57.1%	19	19.4%	10	10.2%	8	8.2%	3.37
Your personal identity as being a Tallinner	2	2.1%	2	2.1%	51	53.7%	17	17.9%	14	14.7%	9	9.5%	3.45
Your opinion about tourism in Tallinn	4	4.1%	6	6.2%	42	43.3%	26	26.8%	12	12.4%	7	7.2%	3.40
Your opinion about visitors in Tallinn	2	2.1%	2	2.1%	50	52.1%	19	19.85	13	13.5%	10	10.4%	3.45

Attitude towards further growth in the city (n=108)	There should be no boundaries to growth of visitor numbers	There is still room for visitor numbers to grow further	There is still room for visitor numbers to grow further but not in the peak season	There is still room for visitor numbers to grow further but not in holiday flats	The growth rate of visitor numbers should be slowed down	All tourism promotion and marketing should be stopped	All tourism developm ent should be stopped	Other
N.	62	49	20	3	4	0	0	4
%	57.4%	45.4%	18.5%	2.8%	3.7%	0%	0%	3.7%

Attitude towards further growth in the neighbourho od (n=108)	There should be no boundaries to growth of visitor numbers	There is still room for visitor numbers to grow further	There is still room for visitor numbers to grow further but not in the	There is still room for visitor numbers to grow further but not in	The growth rate of visitor numbers should be slowed down	All tourism promotion and marketing should be stopped	All tourism developm ent should be stopped	Other

			peak season	holiday flats				
N.	58	36	8	8	7	2	5	5
%	53.7%	33.3%	7.4%	8.3%	6.5%	1.9%	4.6%	4.6%%

Preferences for visitor management strategies (n=108)	Very much against		Against		Neutral		In favour		Very much in favour		I don't know		Mean
	N.	%	N.	%	N.	%	N.	%	N.	%	N.	%	
Spread visitors to new destinations outside the city	4	4.1%	4	4.1%	23	23.5%	38	38.8%	23	23.5%	6	6.1%	3.78
Spread visitors to new destinations within the city	4	4.1%	6	6.2%	17	17.5%	40	41.2%	20	20.6%	10	10.3%	3.76
Stimulate that visitors spend more time inside attractions	7	7.3%	6	6.3%	26	27.1%	28	29.2%	14	14.6%	15	15.6%	3.44
Distribute visitors better during the day	5	5.2%	5	5.2%	26	27.1%	23	24%	18	18.8%	19	19.8%	3.57
Distribute visitors better over the year	4	4.3%	5	5.3%	20	21.3%	25	26.6%	20	21.3%	20	21.3%	3.70
Prevent visitors from going to certain areas by means of transport regulations	31	32.6%	18	18.9%	20	21.1%	3	3.2%	4	4.2%	19	20%	2.09
Demotivate visitors to go to certain areas by means of higher tariffs or tourist taxes	37	39.4%	20	21.3%	14	14.9%	6	6.4%	3	3.2%	14	14.9%	1.98
Create itineraries to concentrate tourists along specific routes	21	22.1%	13	13.7%	29	30.5%	15	15.8%	6	6.3%	11	11.6%	2.67
Attract only tourists from desirable target groups	5	5.2%	7	7.3%	28	29.2%	26	27.1%	13	13.5%	17	17.7%	3.44
Make residents benefit financially from visitors	3	3.1%	6	6.3%	23	24%	31	32.3%	26	27.1%	7	7.3%	3.80
Create city experiences	6	6.3%	9	9.4%	22	22.9%	27	28.1%	18	18.8%	14	14.6%	3.51

where residents and visitors can meet and integrate													
Communicate with and involve local residents and local businesses in planning	4	4.1%	7	7.2%	20	20.6%	28	28.9%	26	26.8%	12	12.4%	3.76
Communicate better with visitors on how to behave	5	5.3%	7	7.4%	22	23.2%	24	25.3%	26	27.4%	11	11.6%	3.70
Improve the infrastructure and facilities	2	2.1%	4	4.1%	19	19.6%	31	32%	37	38.1%	4	4.1%	4.04
Create stricter rules and controls regarding the opening hours of gastronomy	20	21.1%	15	15.8%	23	24.2%	9	9.5%	14	14.7%	14	14.7%	2.78
Forbid the offering of Airbnb in certain parts	38	40%	12	12.6%	15	15.8%	4	4.2%	7	7.4%	19	20%	2.08

(scale: 1=neutral to 5=very positive)

Positive direct encounters		Mean	N.	Std.
Spatial	Better infrastructure	3.13	91	1.462
	More shops	3.11	90	1.434
	More events	3.52	87	1.238
	More leisure facilities	3.45	85	1.239
	Protection of historical parts of the city	3.68	88	1.255
	Restoration of traditional architecture	3.81	86	1.251
Economic	More permanent jobs in tourism	2.83	65	1.420
	More seasonal jobs in tourism	3.27	73	1.436
	More jobs outside tourism	2.76	63	1.456
	Economic development of my neighbourhood	2.89	81	1.396
	Greater number of tourist accommodation	3.38	80	1.216
	Increase of price level of real estate	2.71	73	1.349
	Wealth of residents	2.65	74	1.187
Social	Increased liveliness	3.22	92	1.365
	Better liveability	2.82	89	1.378
	More cultural supply	3.57	94	1.372
	Greater international touch	3.55	92	1.378
	More positive image	3.40	94	1.378
	Growth of the population	2.71	91	1.369
	Change in the composition of the population	2.80	87	1.388
	Improvement of social/cultural life	3.22	92	1.349
	Increase of community's pride	3.00	87	1.455
	Better understanding of other people	2.71	90	1.508
	Revitalizations of local arts and events	3.54	91	1.377
	More opportunities to share culture with visitors	3.34	87	1.363

(scale: 1=neutral to 5=very negative)

Negative direct encounters		Mean	N.	Std.
Spatial	Overcrowding/obstruction of streets/side walks	2.62	89	1.394
	Overcrowding of shops/restaurants/leisure facilities	2.35	86	1.225
	Overcrowding of public transportation	2.11	82	1.247
	Change of appearance of neighbourhood/loss of authenticity	1.93	82	1.163
	Pollution/littering/noise	2.32	85	1.265
	Tourists on bicycles/Segways	2.20	81	1.289
	A loss of diversity on the high-street	2.11	80	1.212
Economic	Increase of price level/affordability of public transportation	1.67	72	1.163
	Increase of price level/affordability of taxis	2.04	83	1.224
	Increase of price level/affordability of rental houses	2.69	64	1.413
	Increase of price level/affordability of private houses	2.57	65	1.369
	Increase of price level/affordability of shops	3.04	93	1.334
	Increase of price level/affordability of leisure facilities	2.84	87	1.320
	Increase of price level/affordability of restaurants and cafes	3.16	92	1.269
	Decrease of permanent jobs	1.91	55	1.236
	Decrease of seasonal jobs	1.88	59	1.247
	Increase of seasonal/migrant workers	2.03	64	1.368
	Increase of tourist accommodations	1.72	76	1.028
	Increase of businesses	1.74	74	1.086
	Big events causing peak moments of crowding	2.05	85	1.290
Social	Change/loss of culture/lifestyle/local customs	1.64	76	1.003
	Commercialisation of residents hospitality	2.18	77	1.233
	Attitude of visitors	2.14	72	1.259
	Misbehaviour of visitors	2.63	76	1.384

	Less housing for residents	1.90	60	1.160

(scale: 1=neutral to 5=very positive)

Positive personal encounters		Mean	N.	Std.
Positive personal encounters	A nicer/better job	2.17	71	1.454
	Improvement of my educational level	2.11	74	1.410
	Improvement of my language skills	2.71	82	1.535
	Improvement of the family income	1.99	67	1.376
	Improvement of my housing conditions	2.03	77	1.337
	Improvement of my understanding of other people/ visitors	2.72	85	1.444
	Improvement of my attitude towards other people/visitors	2.70	88	1.479
	Greater personal pride of the city	3.04	92	1.526
	More pleasant contacts with visitors	3.02	89	1.522

(scale: 1=neutral to 5=very negative)

Negative personal encounters		Mean	N.	Std.
Negative personal encounters	Obstruction of my daily schedule/planning	1.52	64	.797
	Waiting time in shops/facilities	2.06	78	1.121
	It frequently takes me extra time to go to work	1.66	74	1.024
	My privacy is frequently violated/infringed	1.60	68	.995
	MY safety/comfort is frequently violated	1.61	67	1.058
	My family life is frequently infringed	1.32	60	.676
	My social and cultural life is frequently infringed	1.46	65	.849
	I experience unfair competition on the accommodation market	1.33	55	.721

(scale: 1=neutral to 5=very negative)

Stakeholder encounters		Mean	N.	Std.
Stakeholder encounters	Attitude/tourism plans of the government	1.86	56	1.151
	Attitude/plans of tourism marketing/promotion organizations	1.78	55	1.013
	Attitude of tour operators	1.92	63	1.112
	Attitude of tour guides	1.73	60	.989
	Attitude of taxi drivers	2.02	66	1.116
	Attitude of owners/managers of tourist accommodations	1.75	56	.899
	Attitude of other residents towards visitors	1.97	65	1.199