

Tallinn visitor survey 2014 LATVIA

TNS Emor
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TNS Emor
Tallinn visitor survey 2014
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1

Introduction and background of foreign visitors to Tallinn



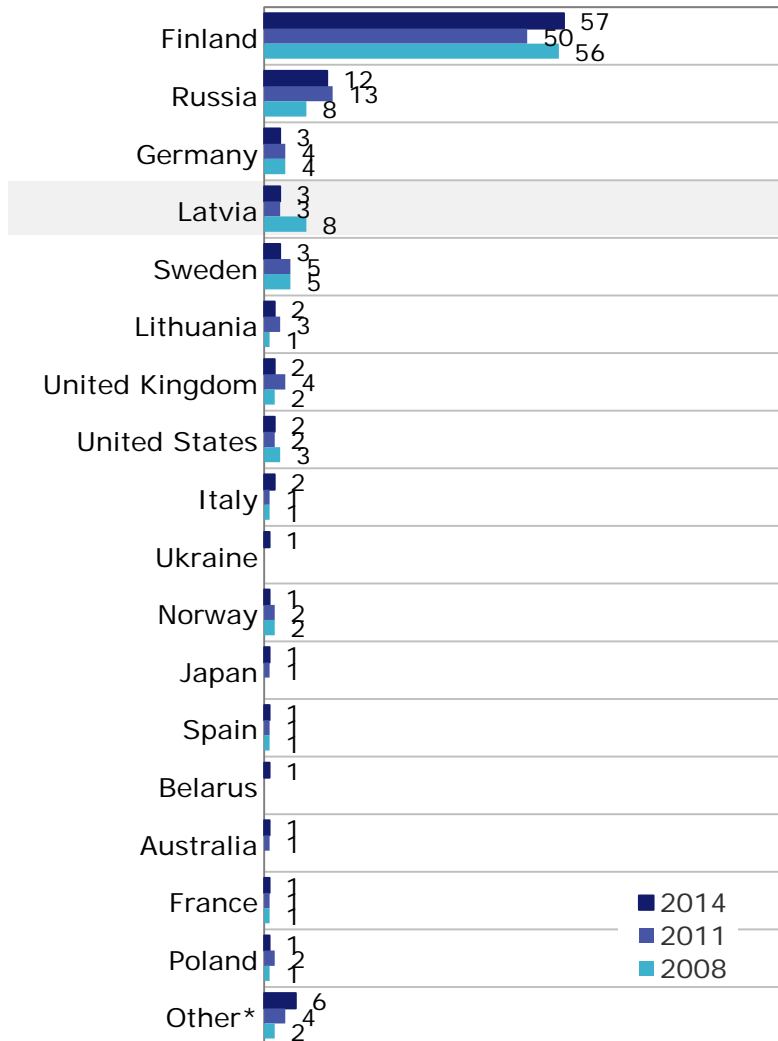


- The survey of foreign visitors to Tallinn has been commissioned by the Tallinn City Enterprise Board and carried out using the same methodology since 2002. Data is collected throughout the survey year among foreign visitors leaving the country via mainland border crossings, Port of Tallinn, Tallinn 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 Latvia.**
- 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.



Foreign visitors' country of residence

% of visitors to Tallinn

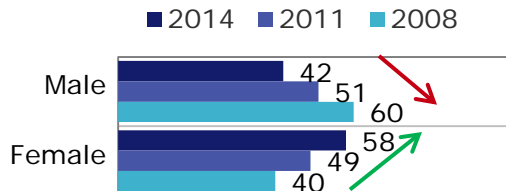


Profile of visitors arriving to Tallinn from Latvia

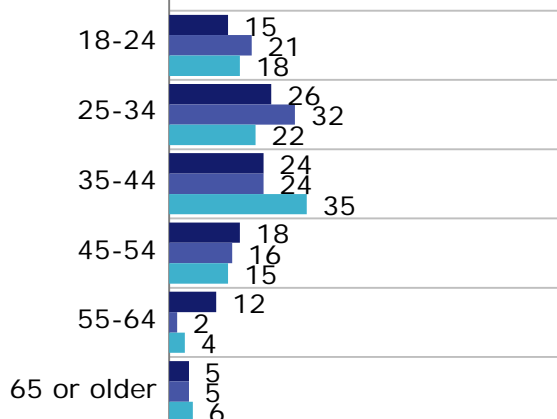
% of visitors to Tallinn from Latvia, n=105



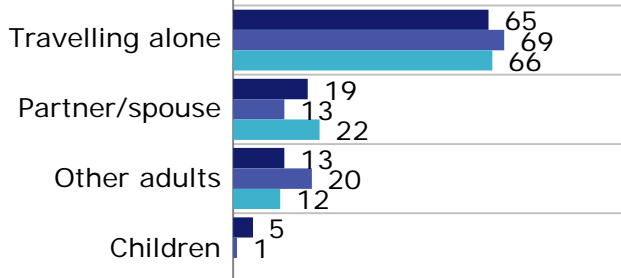
GENDER



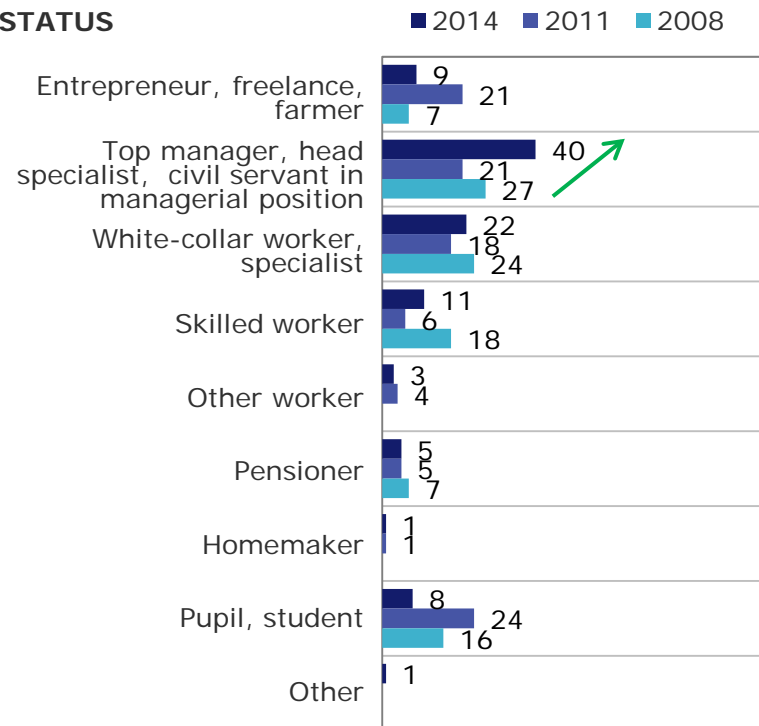
AGE



TRAVEL COMPANION



STATUS



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

2

Summary of main results



Summary (1)

Latvian tourist comes to Tallinn on business and stays here only a short period of time

- In 2014, approximately 99 000 visitors came from Latvia, making up approximately 3% of all foreign visitors to Tallinn (not including cruise passengers). This is on the same level as in 2011.
- Compared to other countries, Latvian people visiting Tallinn include relatively more 25-34-year-olds and top managers (two out of five visitors), the share of women is above average. People predominantly travel alone (65%).
- Tallinn is the only destination for 70% of the visitors and this is significantly above the average of all countries (51%). Still, other destinations in Estonia are visited increasingly more often.
- Latvian visitors mainly come to Tallinn on business (46%) and as expected, this result is significantly higher compared to other countries (average being 13%). Most likely this is the reason Tallinn is the only destination for many visitors. Only every third comes to Tallinn on vacation. The vacation is mainly seen as a short break.
- Approximately 8-9 visitors out of ten spend the night in Tallinn. At the same time, the average number of nights spent in Tallinn has decreased and this indicator is below average (average - 2,3; Latvian target group - 3,7→1,9). The number of nights spent elsewhere has decreased as well, thus we can presume that average trip length is decreasing.
- The majority of Latvian visitors (63%) spend the night at an accommodation establishment; spending the night at hotels is increasing (even though the indicator continues to be low compared to average), the relative importance of other accommodation establishments is decreasing. The number of those spending the night with acquaintances and relatives is significantly above average.
- In booking accommodation, there continues to be a clear preference towards booking online (59%) and the relative importance of this has not changed. In association with increase of business trips, there are also more bookings by companies. Only 7% have used the help of a travel agency/travel agent, which is significantly below average (26%).
- Compared to average, there are more of those among Latvian visitors who make the decision to travel quickly, more than half of the visitors make the decision one or two weeks before the trip or even later. There are significantly less of those who plan ahead longer. Since approximately half of the visitors are in Tallinn on business, it is to be expected that the decision to visit Tallinn is not influenced significantly by cultural and sporting events or discounted offers. Campaigns promoting Tallinn have been noticed relatively little and don't have much influence on this target group.

Summary (2)

Visitors from Latvia spend less than they used to



- The decision to visit Tallinn is primarily based on previous experience. Friends' and acquaintances' recommendations are also an important source of information prior to the trip. Every sixth visitor looks for information on travel portals and travel forums before the trip. Compared to the average, Latvian tourists look for information about Tallinn significantly less often from travel guides, travel agencies and tourist information centers.
- When it comes to information during the trip, they primarily trust local friends-acquaintances (45%). Acquaintances' recommendations are important to visitors from other countries as well (36%) but the numbers remain significantly below that of Latvian tourists.
- Compared to visitors from other countries, public transport (42% versus 19%) and cars (33% versus 20%) are used significantly more to get around in Tallinn. Even though Old Town and downtown are visited the most, visiting other areas has increased as well.
- Even though the main activities in Tallinn are, similarly to previous surveys, going to cafes/restaurants and walking around the city, there has been a significant decrease in shopping, sightseeing and attending cultural events (most likely due to large share of business travel). In general, we can say that tourists are less active (partially due to the fact that trips are shorter and also destinations outside of Tallinn are visited as well).
- Similarly to the previous period, visitors' overall impression of Tallinn continues to be very good (average evaluation - 8,8), being on the same level as overall average. All qualities characterizing the city receive a score of 3,1 or above on a 4-point scale, evaluations have improved in almost all aspects compared to 2011.
- Compared to the average of all countries, higher evaluations are given to child friendliness and tourist information being easy to find, understandable and reliable. Ratings are only slightly below average in case of attractive night-life, number of sights and weather. In other terms the ratings given by of Latvian visitors are the same or slightly above average.
- According to Latvian visitors, the customer service in Tallinn has improved significantly compared to previous periods – higher evaluations are given to professional customer service, their speed of service, helpfulness as well as foreign language skills.
- The amount of money spent in Tallinn per person a day has dropped significantly since 2011 and compared to other countries, the total spending per person is the lowest of all for Latvian tourists. Spending has decreased in all areas.
- In general, Latvian tourists are very satisfied with their trip to Tallinn and for every fifth visitor it exceeded their expectations. Nine out of ten visitors definitely plan on returning to Tallinn but most likely a large share of them are regular business trips. 85% of respondents would definitely recommend Tallinn as a travel destination to their friends-acquaintances.

3

Purpose of the visit and route



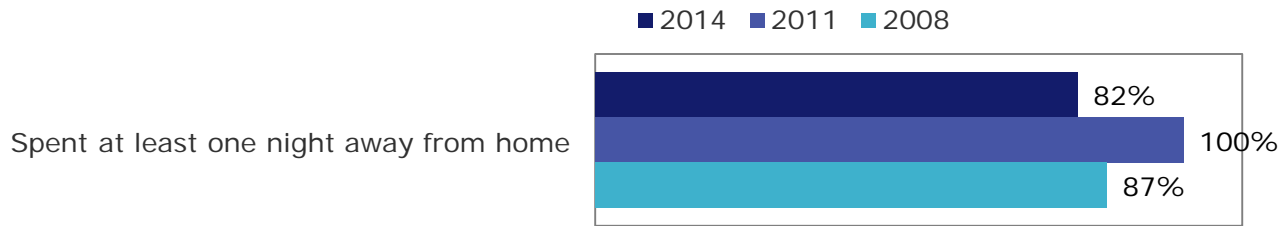


Tallinn as the destination

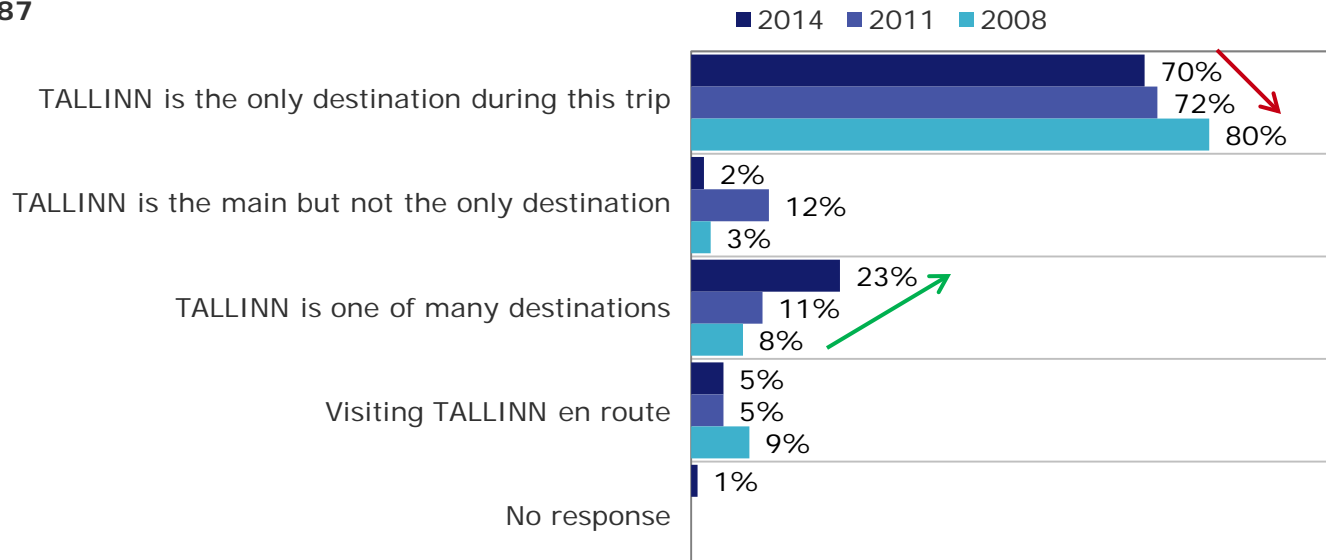
More and more destinations are visited in addition to Tallinn

% of all visitors who have spent at least one night away from home, n=87

Are you spending at least one night away from home?
n=105



Which of the following describes the route of your trip the best? n=87



Purpose of the trip

Latvian visitors come to Tallinn mainly on business

% of all visitors, n=105



Which of the following describes the best the purpose of your trip?



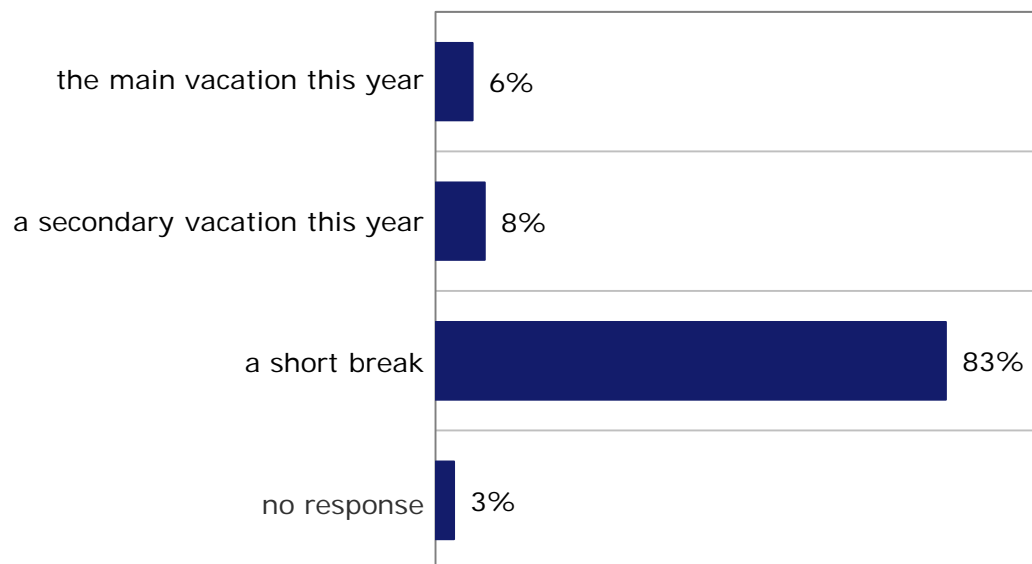
Meaning of the holiday trip

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=39



Would you describe your holiday as ...



4

Spending the night in Tallinn and accommodations



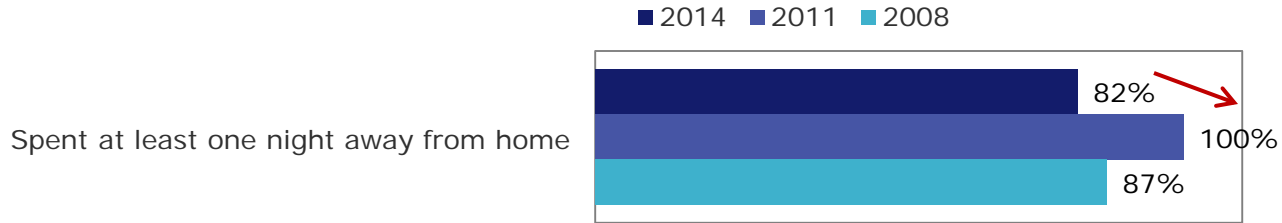


Spending the night away from home (1)

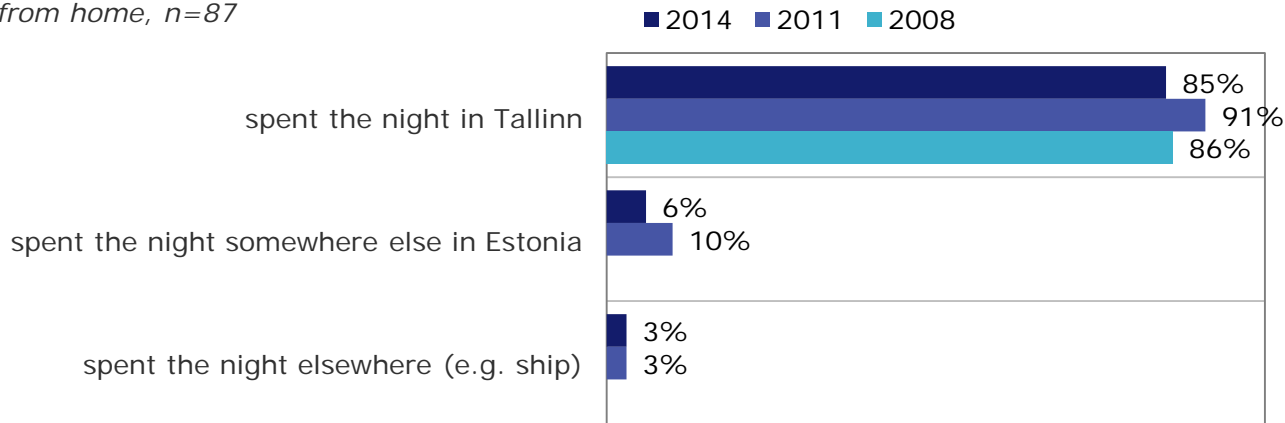
85% of visitors to Tallinn spend a night in Tallinn

% of all visitors to Tallinn who have spent at least one night away from home, n=87

Are you spending at least one night away from home?
n=105



% of all visitors who have spent at least one night away from home, n=87

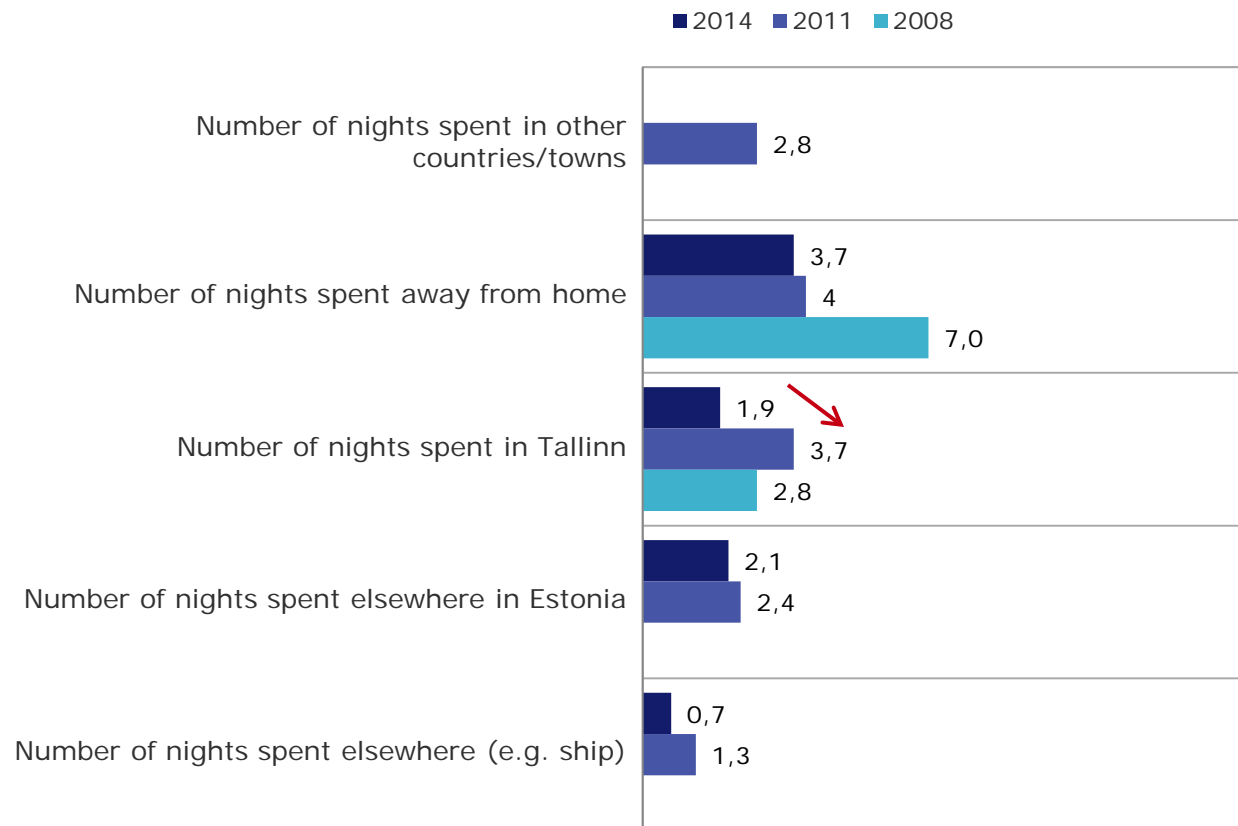


Spending the night away from home (2)



The average length of the trip continues to decrease

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



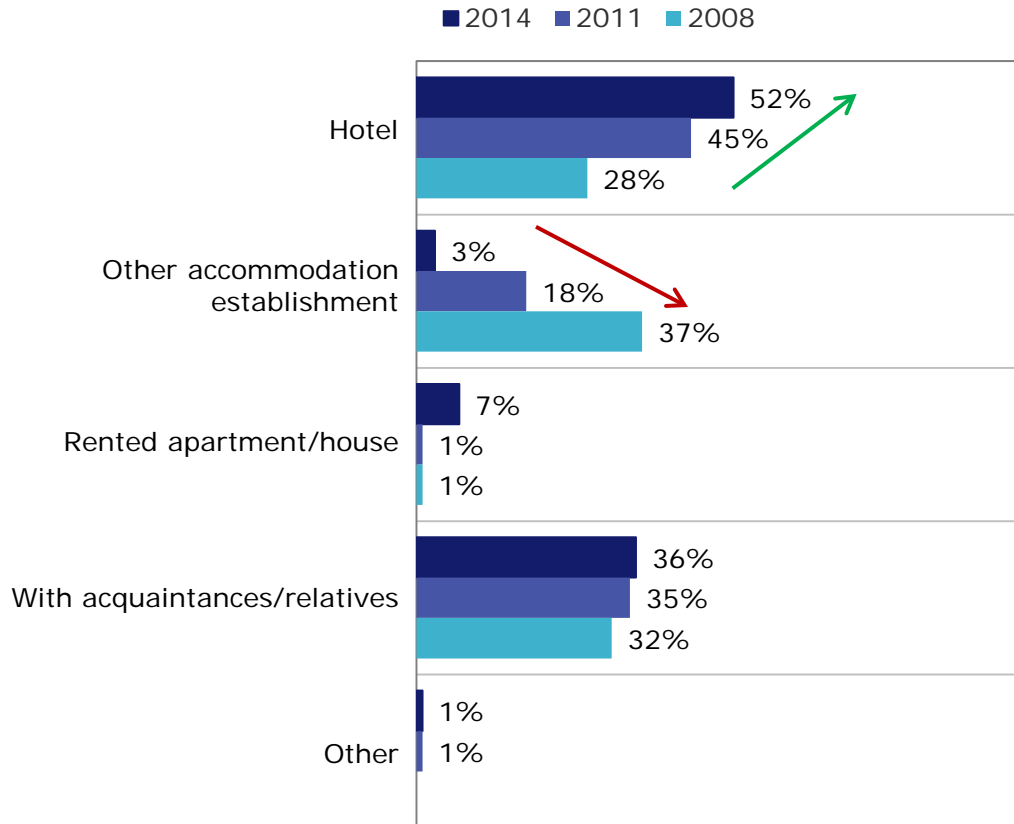


Spending the night in Tallinn

Spending the night at other accommodation establishments has decreased significantly

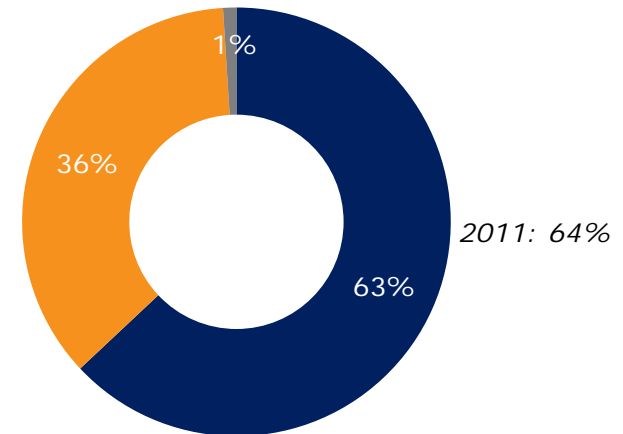
% of visitors to Tallinn who spent at least one night in Tallinn, n=74

Where did you spend the night in Tallinn?



Where did you spend the night in Tallinn?

- Accommodation establishment or rented apartment/house
- Acquaintances/relatives
- Other

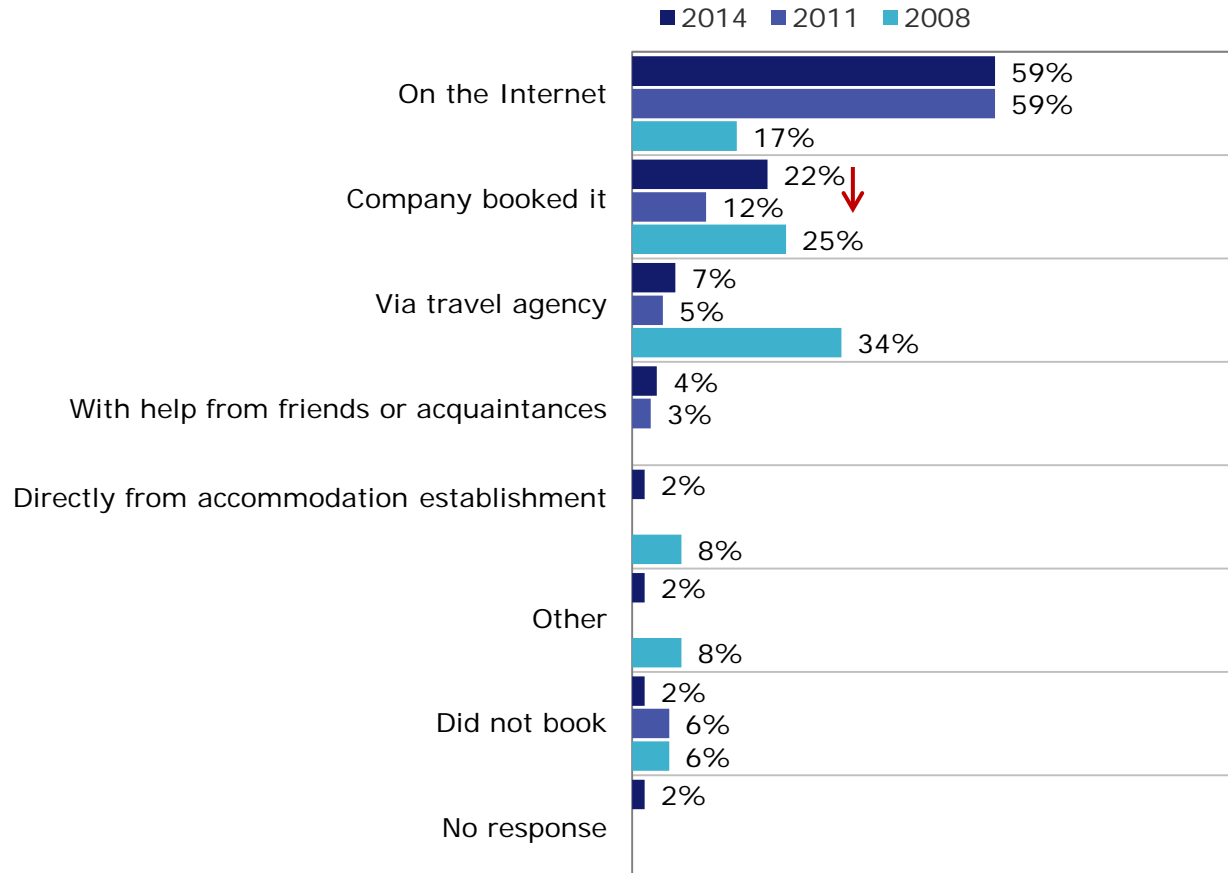


Booking accommodation

Internet is definitely the main channel for booking

% of visitors to Tallinn who spent at least one night at an accommodation establishment in Tallinn, n=47

How did you book your ACCOMMODATION in Tallinn?



5

Planning the trip to Tallinn



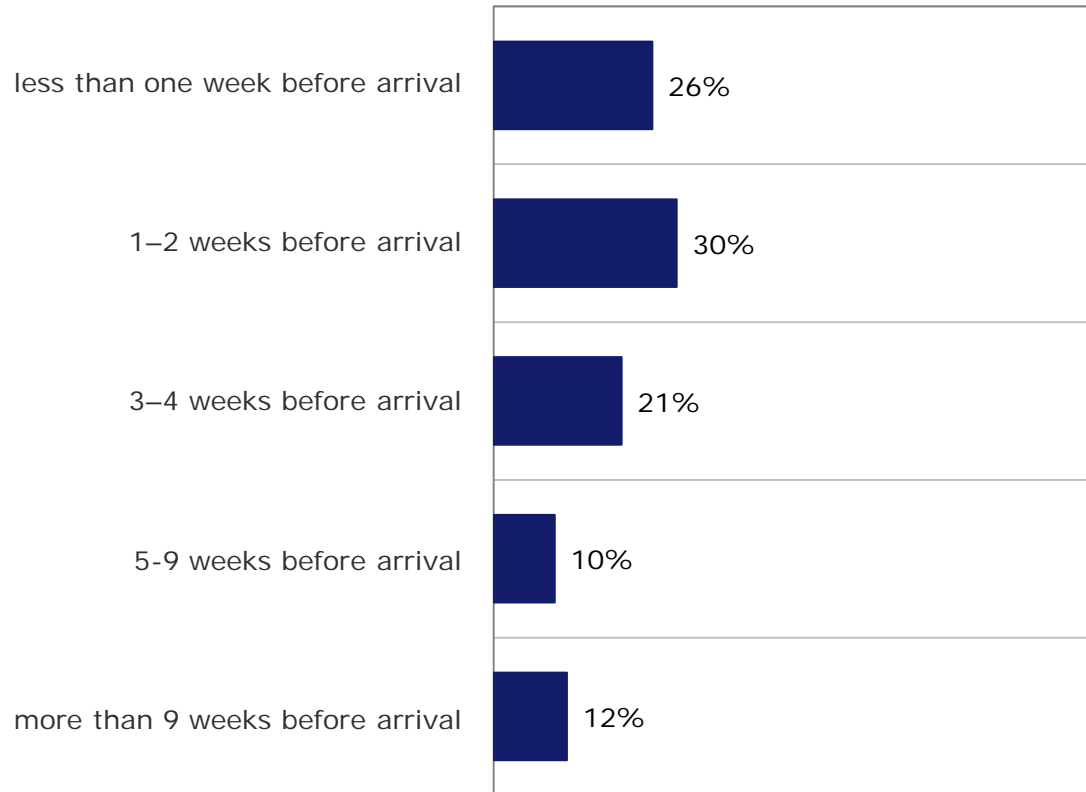
The decision to travel to Tallinn

The trip is planned a relatively short time ahead

% of visitors to Tallinn, n=105



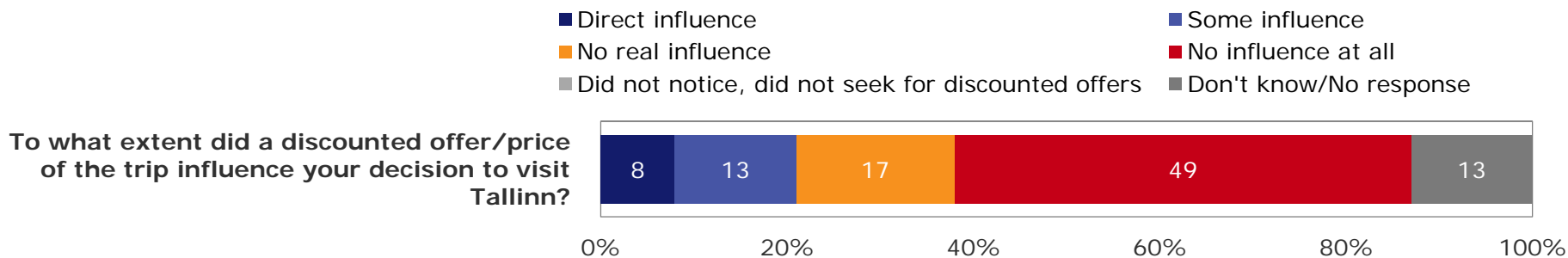
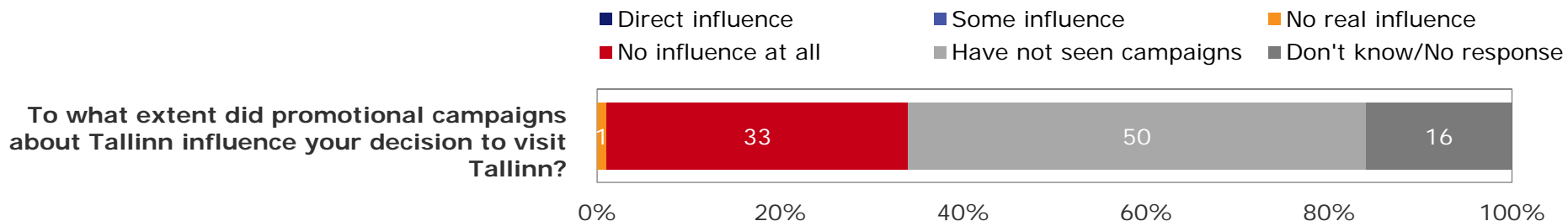
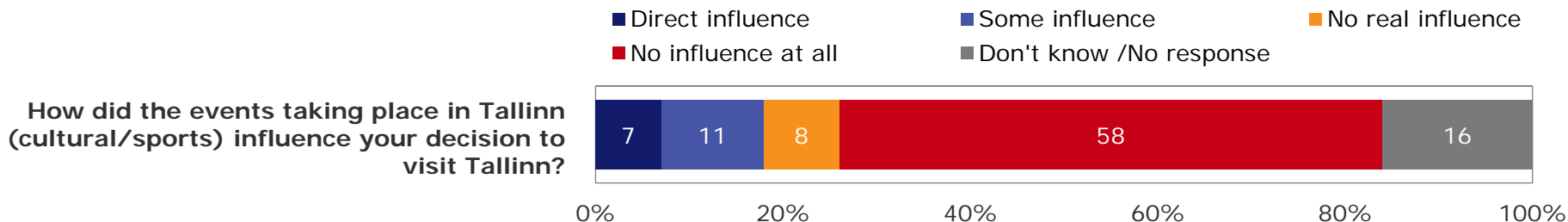
When did you make the decision to travel to Tallinn? Was it ...



Factors influencing the decision to travel to Tallinn

Campaigns promoting the city are little noticed and not influential

% of visitors to Tallinn not on a business trip, n=56

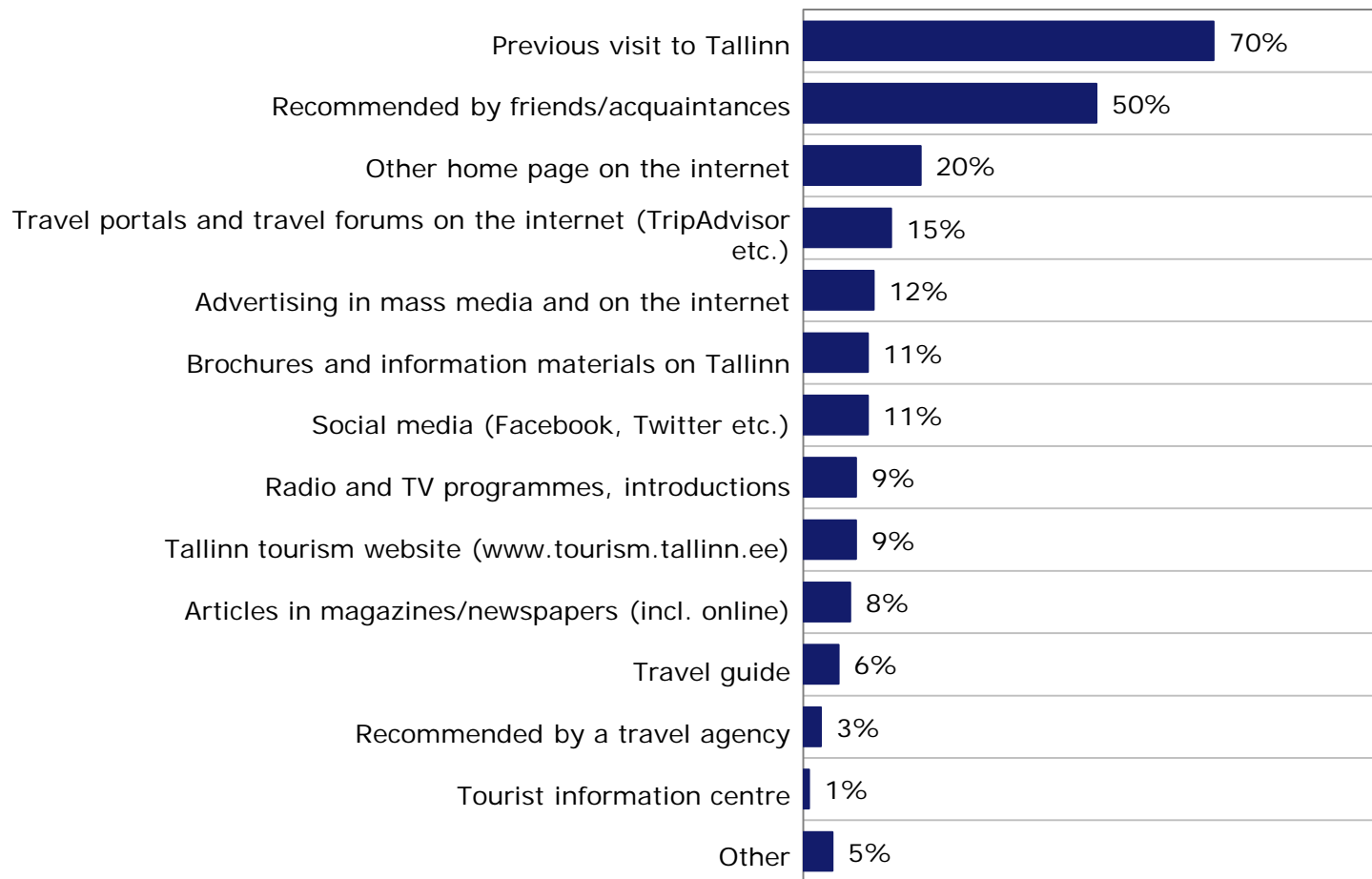


Sources of information about Tallinn before the trip

Large share of visitors are repeat visitors

% visitors to Tallinn, n=105

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



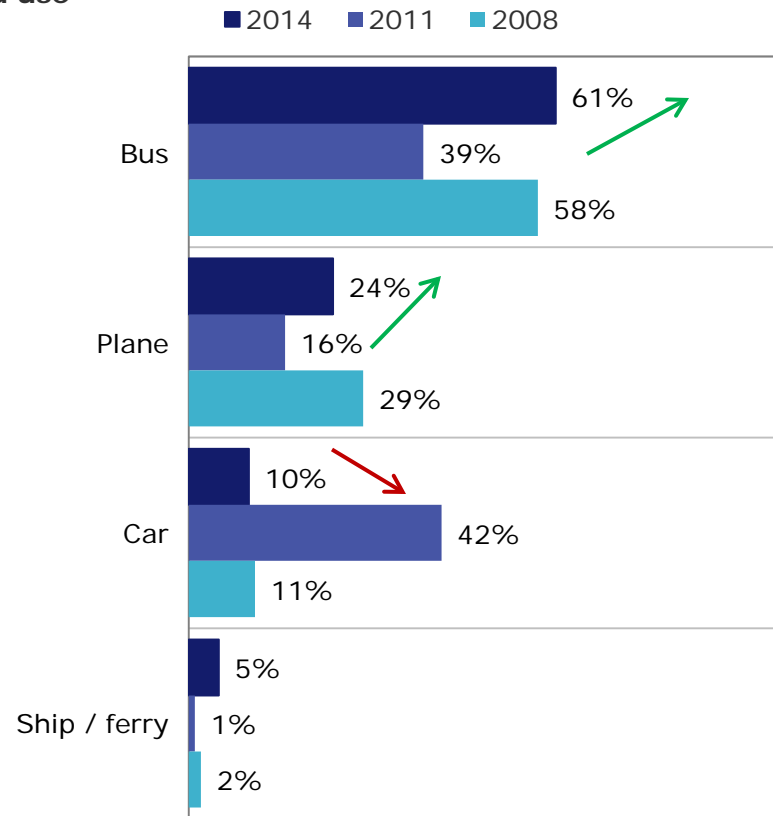


Transport used to arrive in Tallinn

Good and convenient bus connections have left cars behind

% of visitors to Tallinn, n=105

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



6

Visit to Tallinn



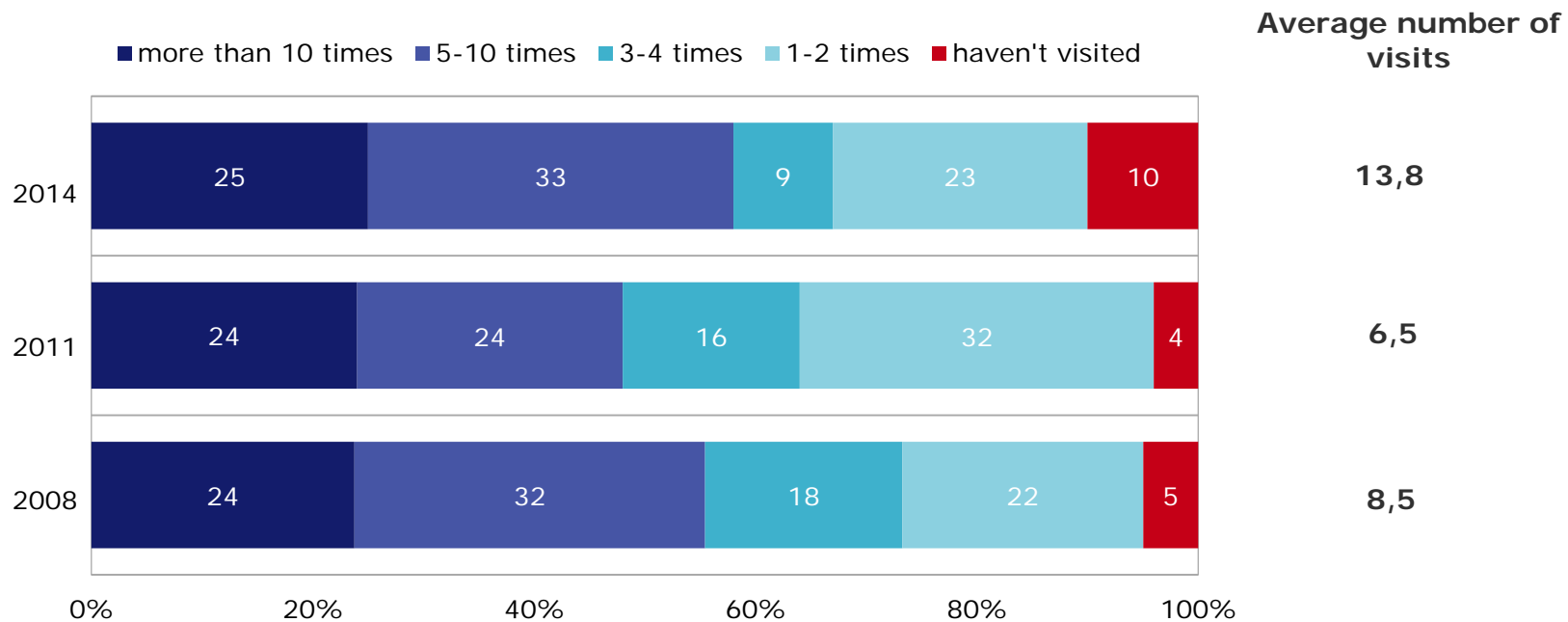


Previous visit to Tallinn

The share of those who have visited Tallinn more than once is very high

% of all visitors to Tallinn, who were able to answer the question, n=93

How many times have you visited Tallinn before this trip?



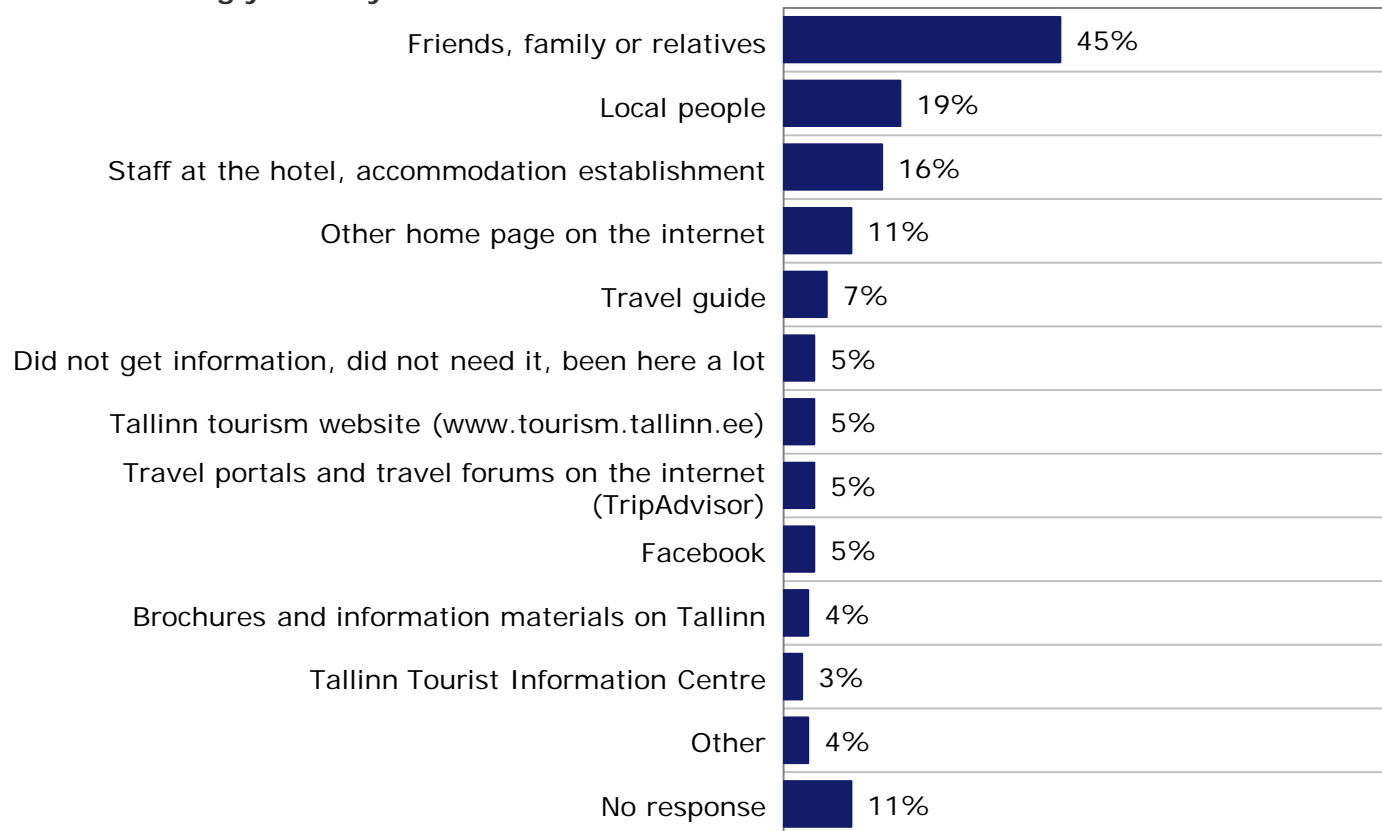


Sources of information about Tallinn during the trip

Friends and acquaintances are important, internet is less important

% of visitors to Tallinn, n=105

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



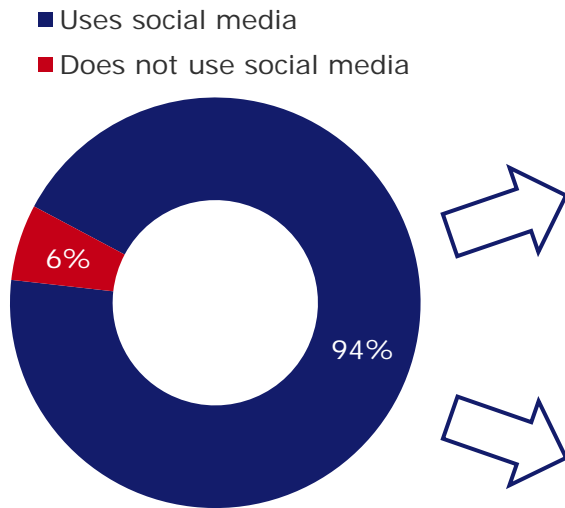
Sharing travel experiences on social media

Less than half of the visitors share their experiences

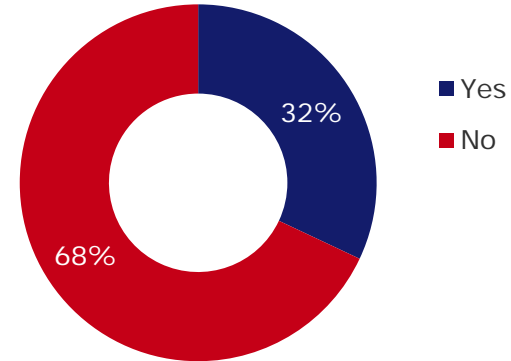


% of those using social media

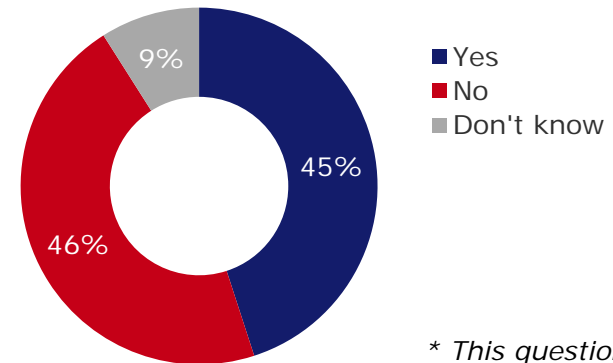
Use of social media (Facebook, Twitter, blogs) n=105



Did you share travel experiences on social media during your stay in Tallinn (Facebook, Twitter, blog)? n=98



Do you plan to share your travel experiences on social media AFTER visiting Tallinn (Facebook, Twitter, blog)?* n=45



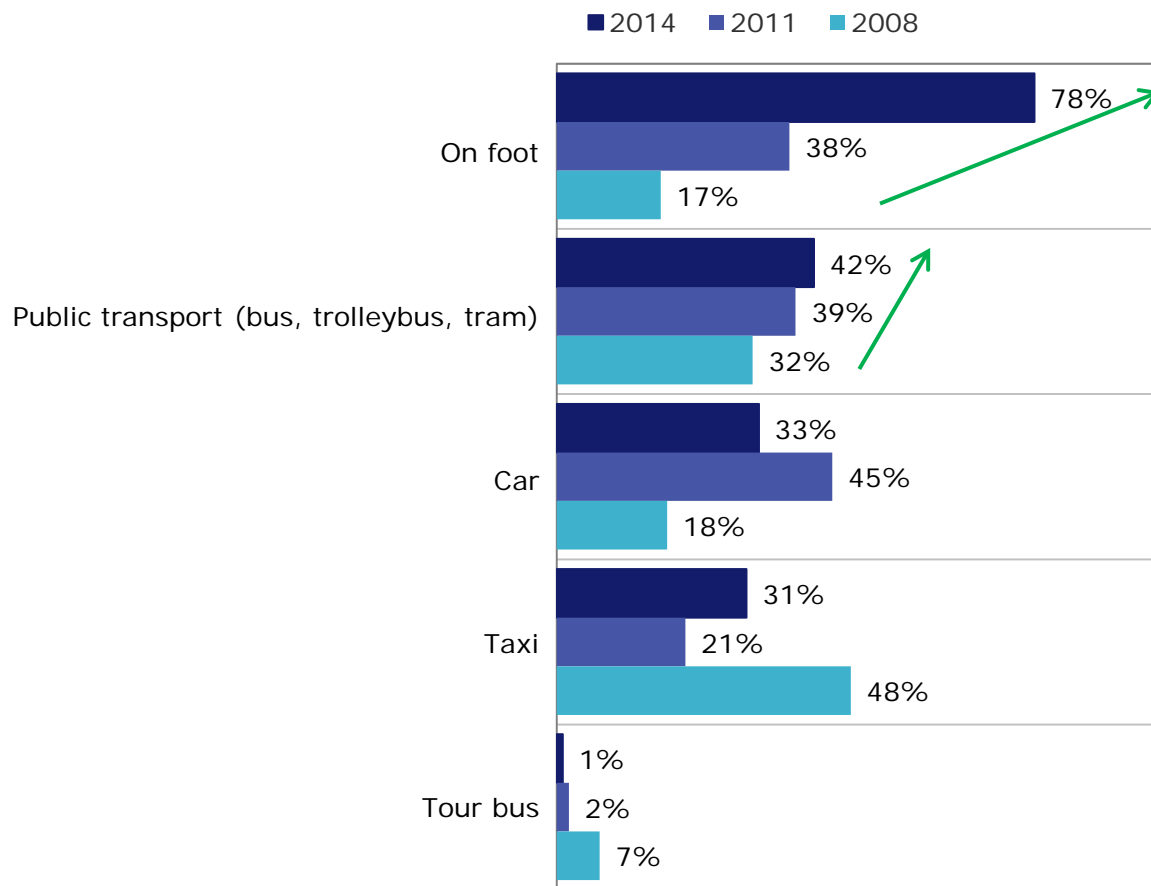
* This question was added in July

Transport used in Tallinn

Public transport is overtaking use of cars

% of visitors to Tallinn, n=105

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

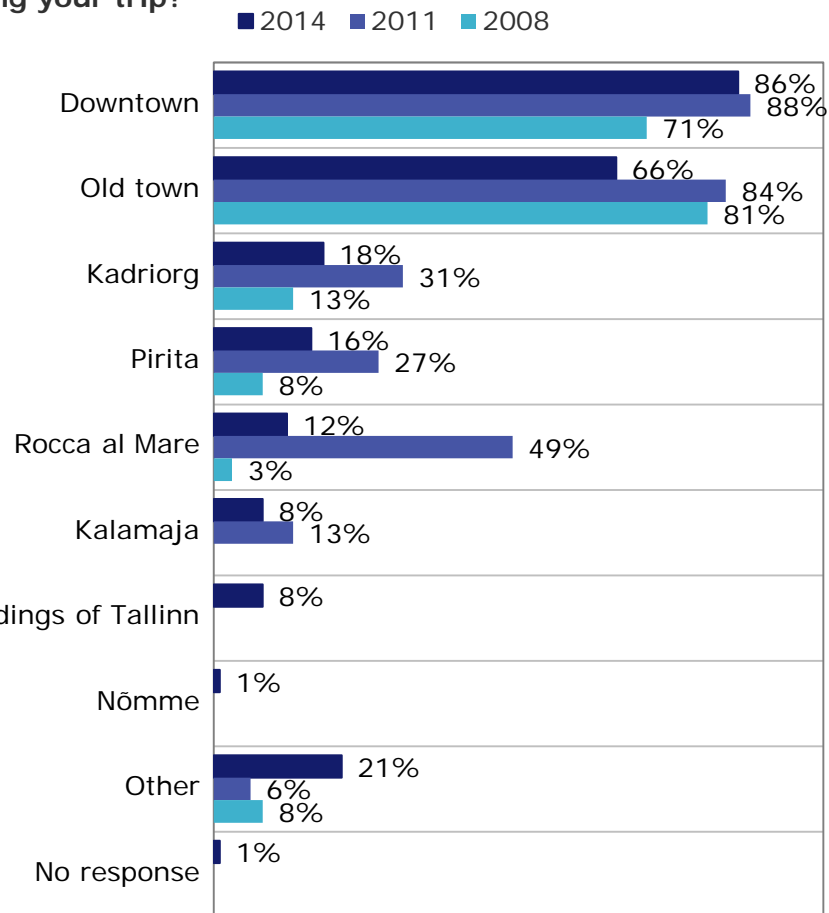


Areas visited in Tallinn

Visiting smaller areas has increased

% of visitors to Tallinn, n=105

Which areas of Tallinn did you visit during your trip?



The following regions were mentioned under „other“:

- Lasnamäe
- Kristiine
- Mustamäe
- North-Tallinn
- Ülemiste keskus
- Airport

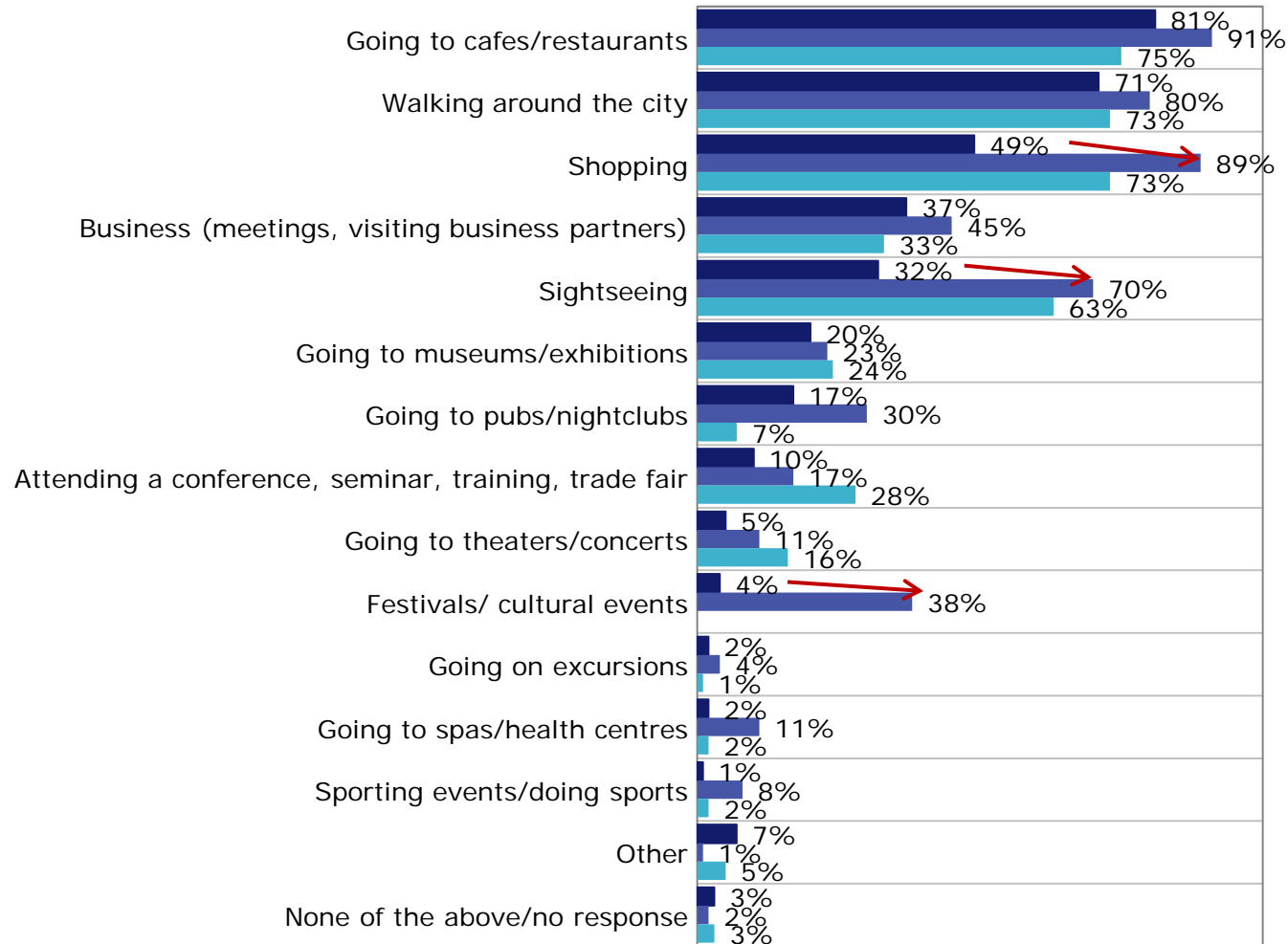
Activities in Tallinn: activeness has decreased

% of all visitors to Tallinn, n=105



Which of the following activities did you do in Tallinn?

■ 2014 ■ 2011 ■ 2008





Evaluation of overall impression of the trip to Tallinn

Approximately 2/3 of the visitors were very satisfied with the trip

% of visitors to Tallinn, n=105

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

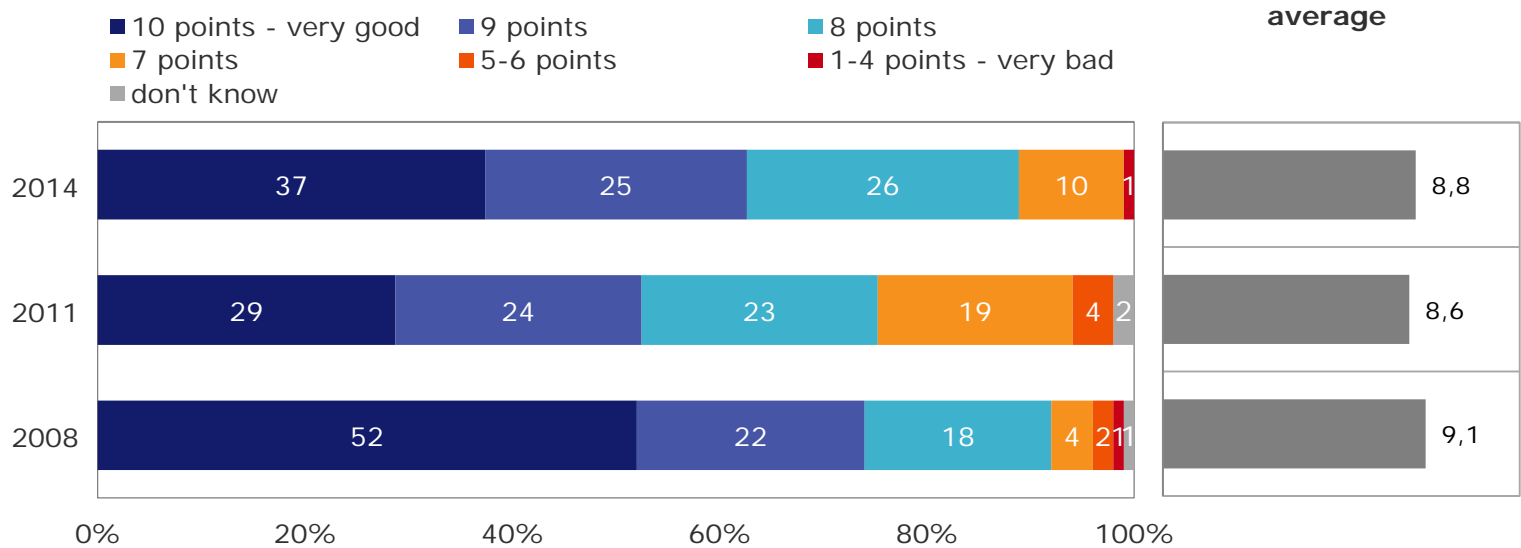
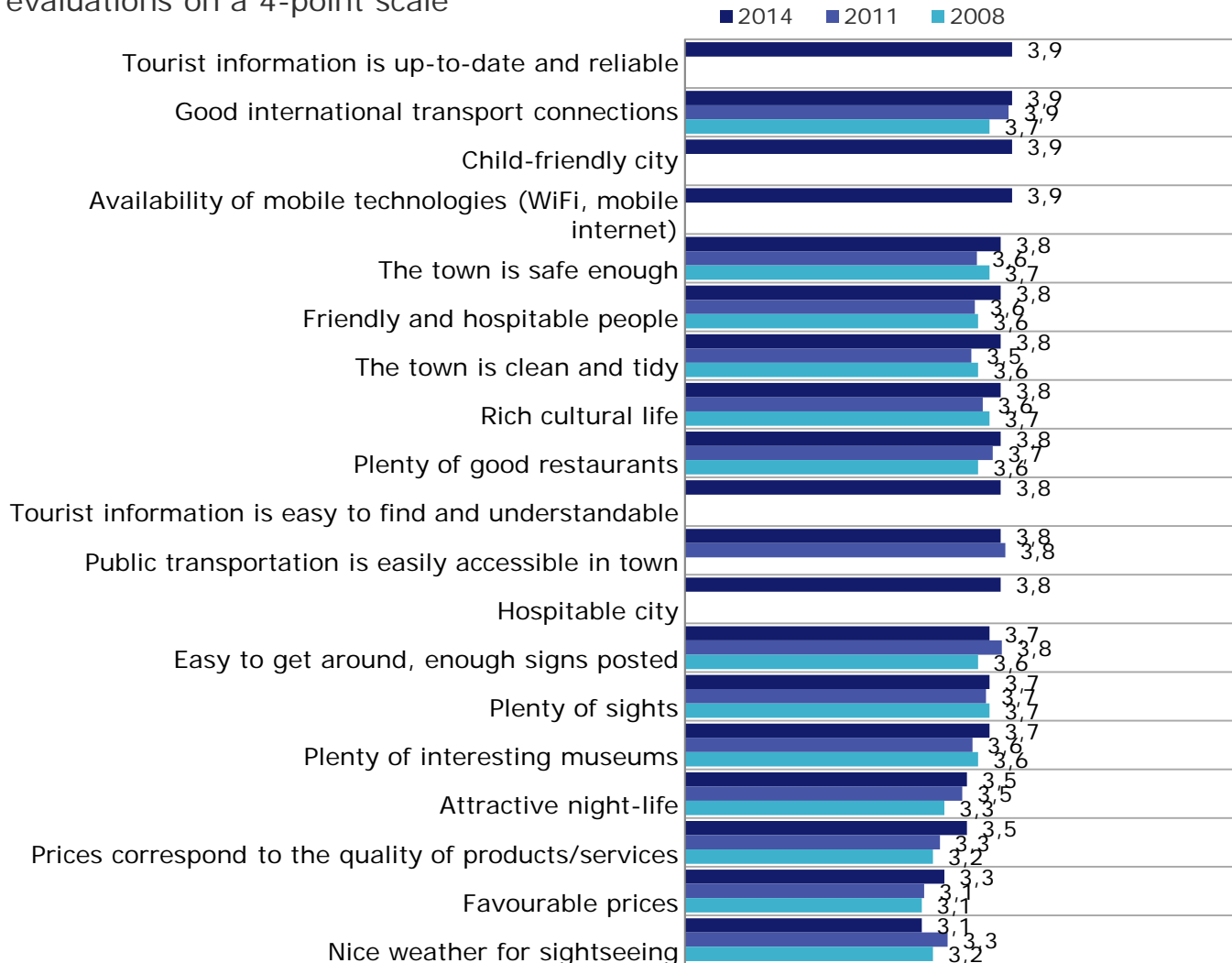


Image of Tallinn

Image profile has improved

average evaluations on a 4-point scale



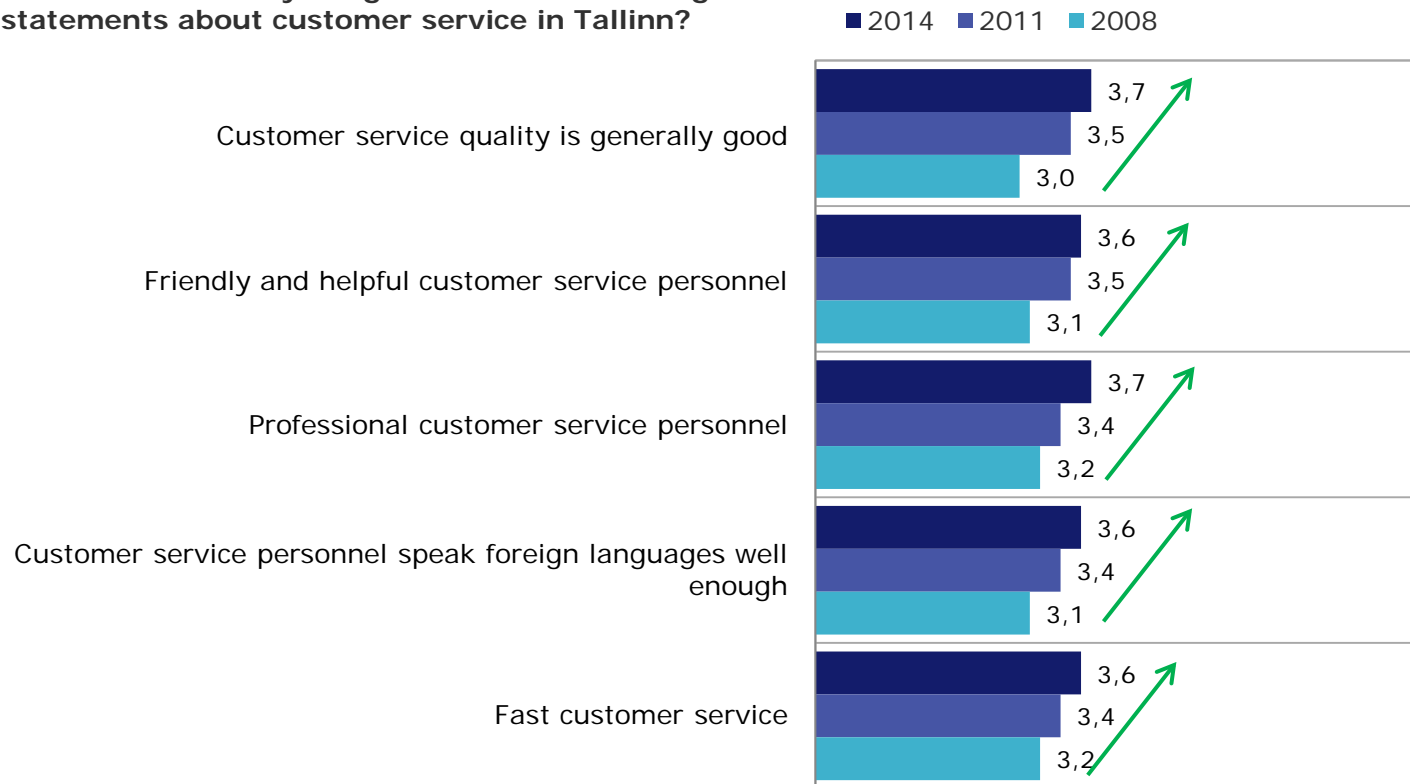
Customer service in Tallinn

Customer service is seen as constantly reaching higher levels

average evaluations on a 4-point-scale



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



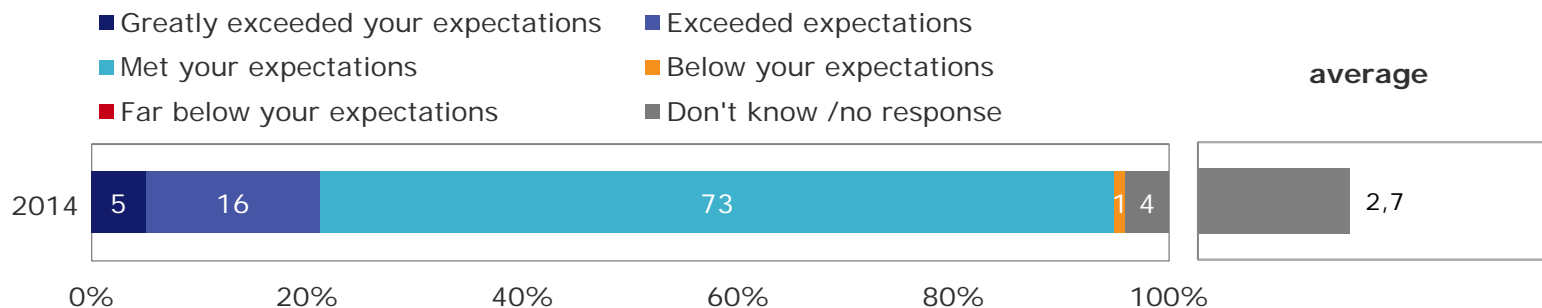


Trip to Tallinn meeting expectations

The trip exceeded expectations for every fifth visitor

% of visitors to Tallinn, n=105

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



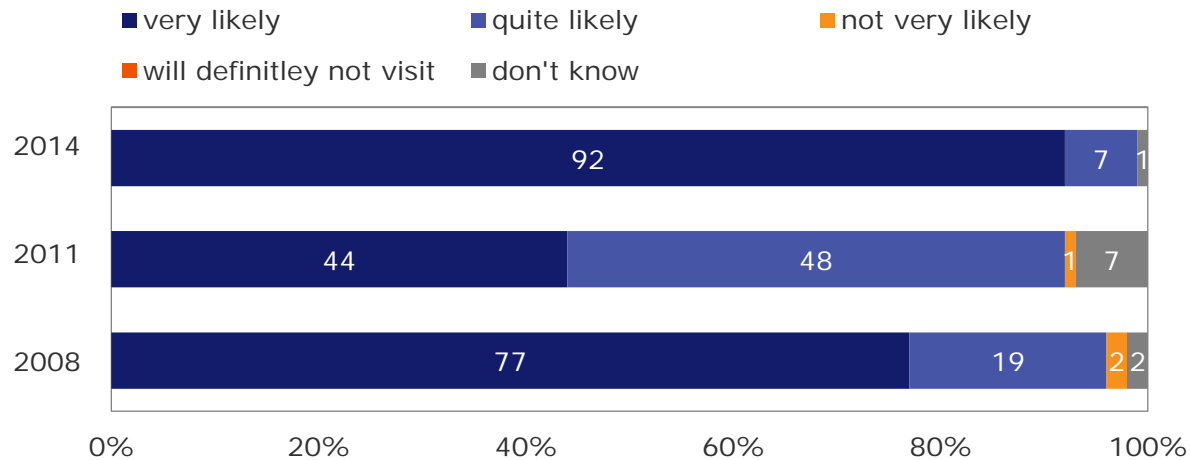


Likelihood of visiting Tallinn again

Since many of them come on business, they will return to Tallinn repeatedly

% of visitors to Tallinn, n=105

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



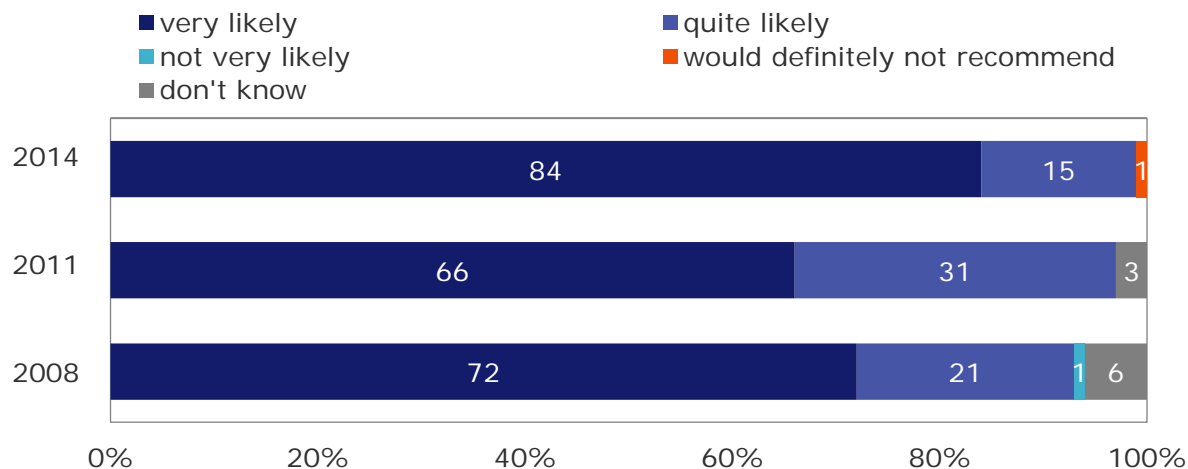
Recommendation communication

Overall willingness to recommend is very high

% of visitors to Tallinn, n=105



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



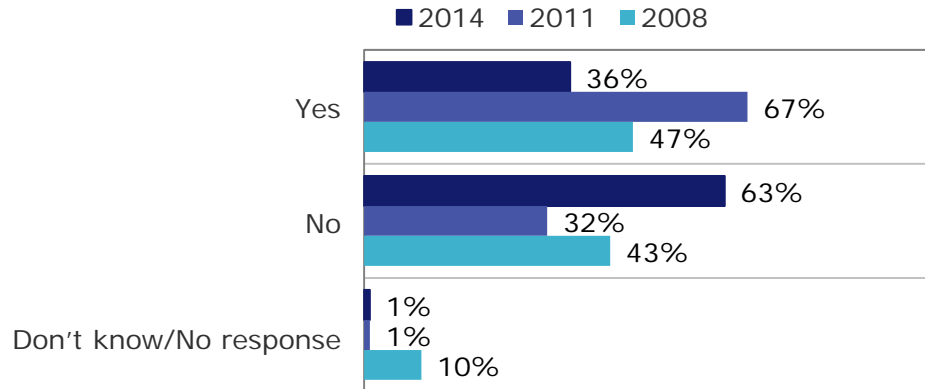


Information about Tallinn Card and its usage

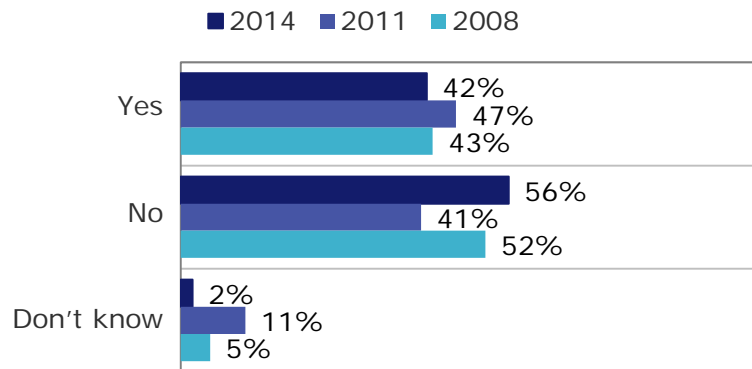
Awareness has decreased

% of visitors to Tallinn

Do you know or have you heard anything about the Tallinn Card?
n=105



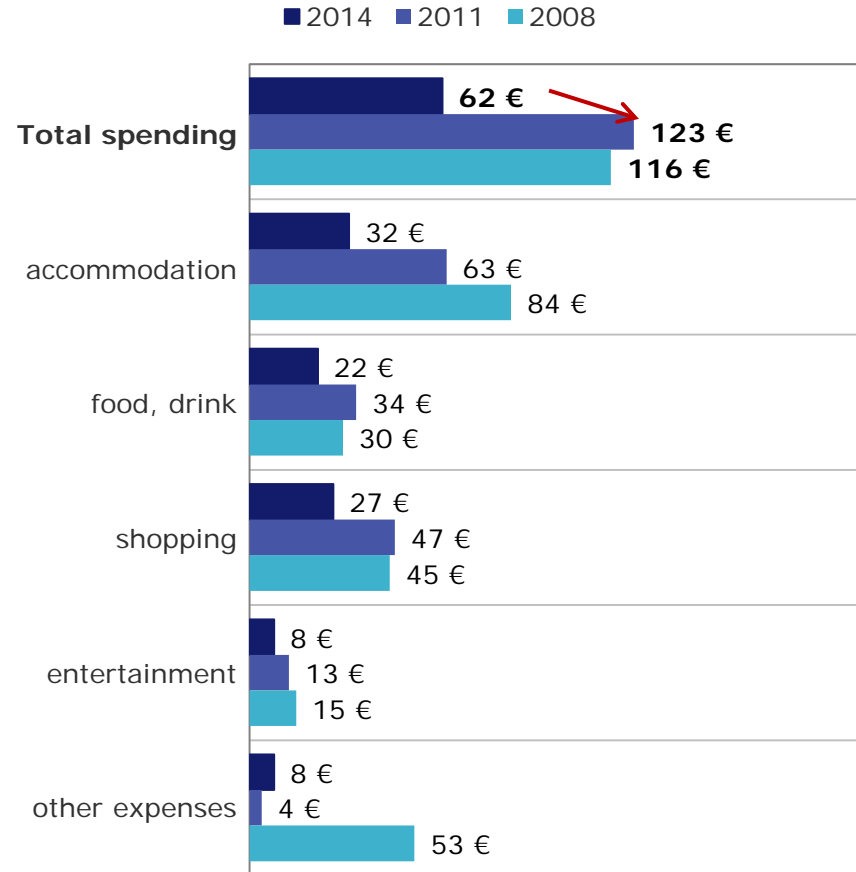
Have you used the Tallinn Card? n=38



Average spending per person per day

Spending has decreased significantly

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 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	37990	98510	133096	58711	328307
Total:	248314	391471	452823	319393	1 412 001

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	404818	135660	540478
Total:	1705841	1323294	3029135

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	62541	162173	219111	96653	540478
Total:	550064	831004	940556	707511	3029135

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	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%
Total:	3029135	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:	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

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