

Survey into foreign visitors to Tallinn 2008–2011

Target market **Finland**

TNS Emor
March 2012



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Introduction





- Using the same methodology, the survey of foreign visitors to Tallinn has been ordered by Tallinn City Enterprise Board and has been carried out since year 2002. Data is being collected throughout the survey year among foreign visitors who are leaving the country at mainland border crossings, Port of Tallinn and Tallinn Airport.
- The main goal of the survey is to collect detailed data on foreign visitors to Tallinn, the purpose of their trip, evaluations and expenditure made during the trip. The survey reveals:
 - from which countries, how and for how long foreign visitors have arrived in Tallinn;
 - what is the purpose of their visit to Tallinn and what motivated them to choose Tallinn as the destination city;
 - which services aimed at foreign visitors are used and how they evaluate the quality of the services;
 - how much they spend money and on what and how they evaluate the value for money received for the products/services.
- The results of the survey are presented in separate reports in terms of target countries, including the general report and analysis of all foreign visitors, tourists from Finland, Russia and Latvia, Sweden and Norway, United Kingdom and Germany as well as on cruise voyagers and turnaround tourists.
- **The current report describes foreign visitors to Tallinn who come from Finland.**
- The data in this current report has been weighed according to the proportion of the total population (see weighing methods in Appendices). The results of 2011 have been compared to results of 2005 and 2008.

Summary of the main results



Summary (1)

Still the largest proportion of foreign visitors



- Altogether, 1.13 million Finnish tourists visited Tallinn in 2011. Finnish tourists still comprise the largest proportion of all foreign tourists of Tallinn. Together with cruise voyagers and turnaround tourists Finnish visitors account for 42%, without 50% of foreign visitors.
- Compared to other countries, there are still more of those aged 45 or over, however the trend shows that the Finnish tourists are getting younger and the proportion of skilled workers is increasing. The amount of pensioners is decreasing fast.
- The number of one-day visitors as well as those who spend the night in Tallinn has grown significantly. In comparison with 2008, the number of those who spend the night here has increased by 11%, whereas, the average of foreign tourists has grown by just 3%.
- Nevertheless, the proportion of holiday-makers (62%) is the lowest of the average of all countries and highest for shoppers (19%). Thus, the meaning of a holiday is more important.
- Travellers come less often alone, but smaller groups of people (less than 5) who travel together or larger groups of people (over 16) are more frequent than the average.
- Compared to other countries, Finnish tourists stay overnight away from home the least frequently (2 nights on the average, while other nationalities spend 4-8 nights away from home). In case of those who spend a night in Estonia, the number of nights spent in Tallinn has remained the same, whereas, the average number of nights spent somewhere else in Estonia has decreased.
- What concerns booking an accommodation, the proportion of those who book shorter as well as longer ahead has grown, however majority of Finns still book 1-4 weeks before arrival. Even though booking accommodation is less frequent via a travel agency/tour operator and constantly growing via the internet, there are currently still less of those who book via the internet; internet-booking is also less popular compared to the total of other countries.
- The proportion of those who have been in Tallinn more than 10 times has almost doubled, accounting for 63% in 2011. On average, a visitor from Finland has been to Tallinn already 26 times.

Summary (2)

Activities have become more versatile, but spending per person per day has decreased



- Because the proportion of first-time visitors from Finland is virtually non-existent (3% compared to 37% among those from other countries), the main information sources on Tallinn are personal experience and recommendation of friends. Concerning other channels, the internet (including cheap short holiday packages) is also an important source. 13% of visitors have heard of the packages, but less than the average consider these to be an important motivator for coming here (this has motivated mostly those who come from Sweden).
- Similar to previous surveys, the main activities of Finnish tourists in Tallinn are shopping, a walk in the city and visiting cafes/restaurants. Compared to earlier surveys, visiting pubs/nightclubs, spas and beauty parlours is still on the increase, but the proportion of those visiting museums is also gaining popularity.
- Compared to visitors from other countries, Finnish tourists are the most frequent shoppers (87% compared to the average of 79% for other countries) and visitors of beauty parlours (20% compared to the average of 18%), but the least frequent visitors of cultural events (42% vs. 58%) or conferences/business venues (10% vs. 14%).
- Even though the activities of Finnish tourists are getting more versatile, spending per one person per day is 8 EUR lower than in 2008 both in terms of the total spending and spending in separate categories. While being in Tallinn, a Finnish tourist spent 141 EUR per day (compared to the average of 195 EUR in case of other tourists). The average amount of money spent per one person on shopping during the trip is significantly lower (91 vs. 146), but taking into consideration the proportion of Finnish tourists, they definitely have the greatest impact on the turnover of our shops. Spending on entertainment is quite similar to tourists from other countries, but they spend more on accommodation and less on food/drinks (probably because there are more package-travellers among Finnish tourists).
- The largest part of Finnish visitors spend time in the old town and city centre, but visitors to Rocca al Mare have also increased in number. Taxi is the main way of transport and more visitors than before have used it.

Summary (3)

All tourists intend to come back to Tallinn and 82% are willing to definitely recommend it to a friend



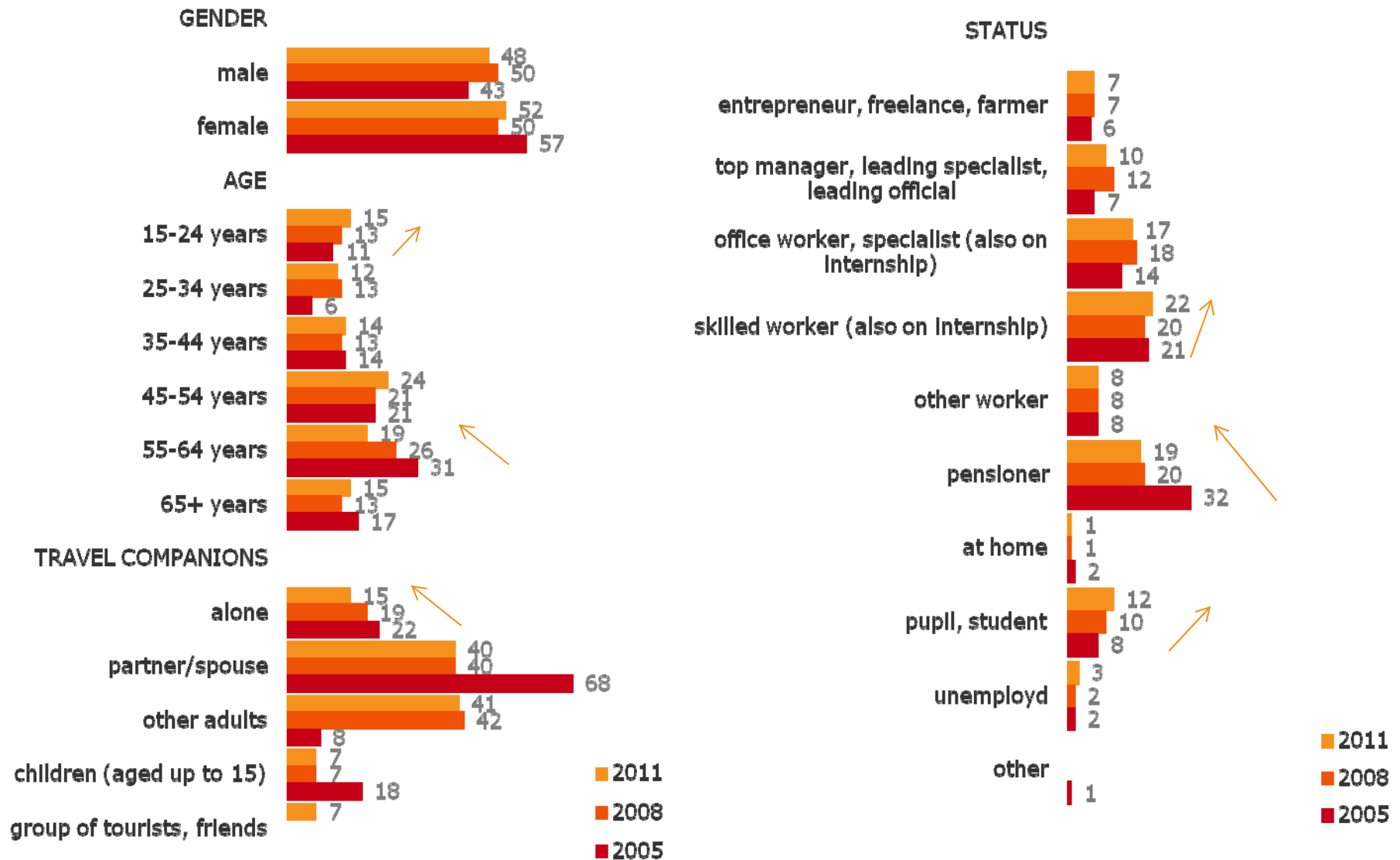
- Evaluations to general impressions of Tallinn are quite the same as in 2008 (8.5 on a 10-point-scale). Compared to the average of other countries, the evaluations are somewhat lower since there are less of those who have given maximum points (16% vs. 22%).
- Visitors from Finland give above average evaluations to Tallinn's nightlife, museums and means of transport for arrival. Similar to the average the evaluations are given to people, cultural life, weather, restaurants and the sufficiency of sights. The evaluations are no different from the average in terms of various aspects of service as well.
- Finnish tourists display above average criticism to safety, tidiness of the city, availability of tourist information and the ease of moving around in Tallinn. Evaluations for the level of prices and value for money are also below average.
- Regardless of the somewhat lower evaluations, the intention to visit Tallinn again and recommend it to friends is still very high (higher than the respective indicators for all other countries).

Purpose and route of the trip: foreign visitors from Finland



Respondents' profile (1)

% of all Finnish visitors, n=399

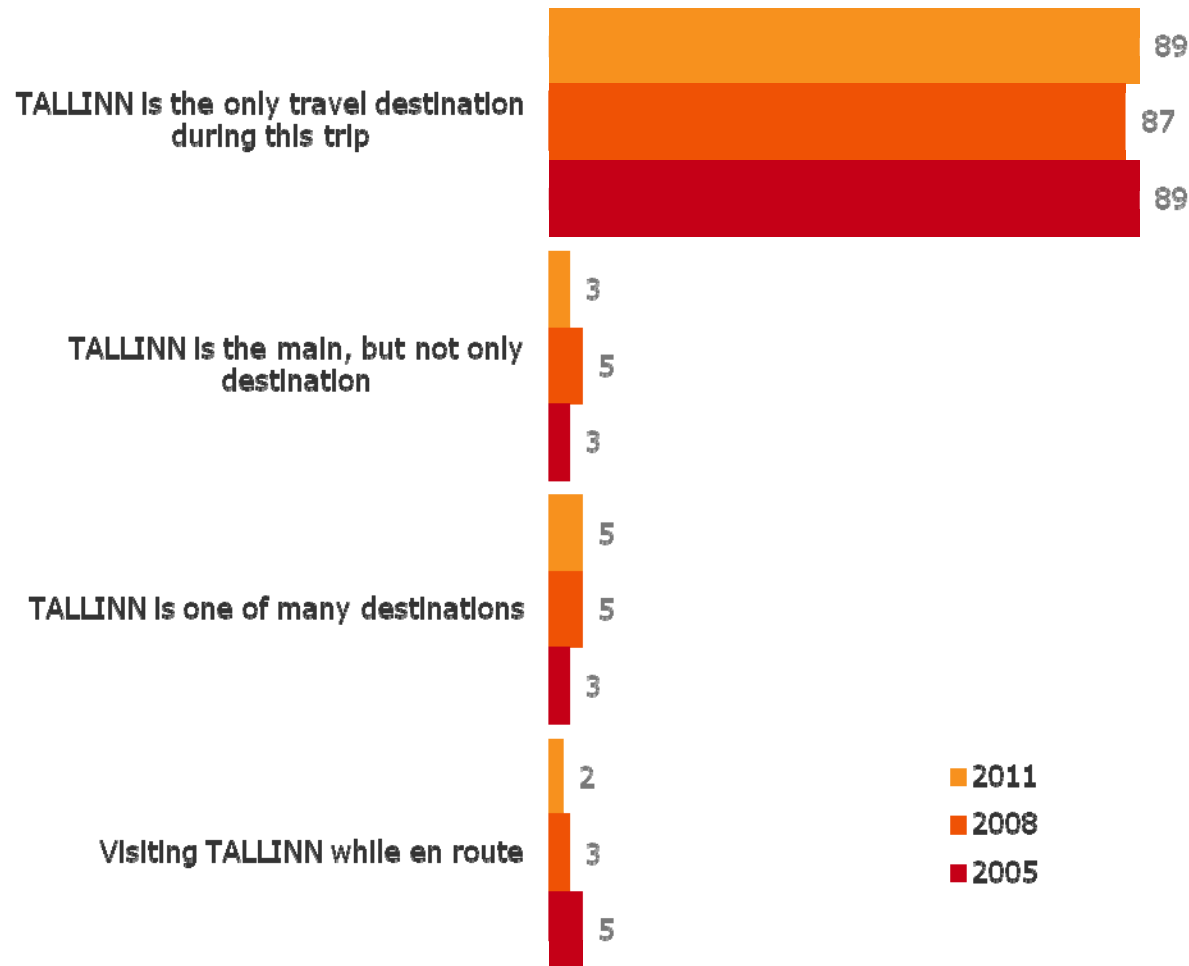


Tallinn as a travel destination

Tallinn is still the only destination for nine visitors out of ten



% of all Finnish visitors who have spent at least one night away from home (82% in 2011)

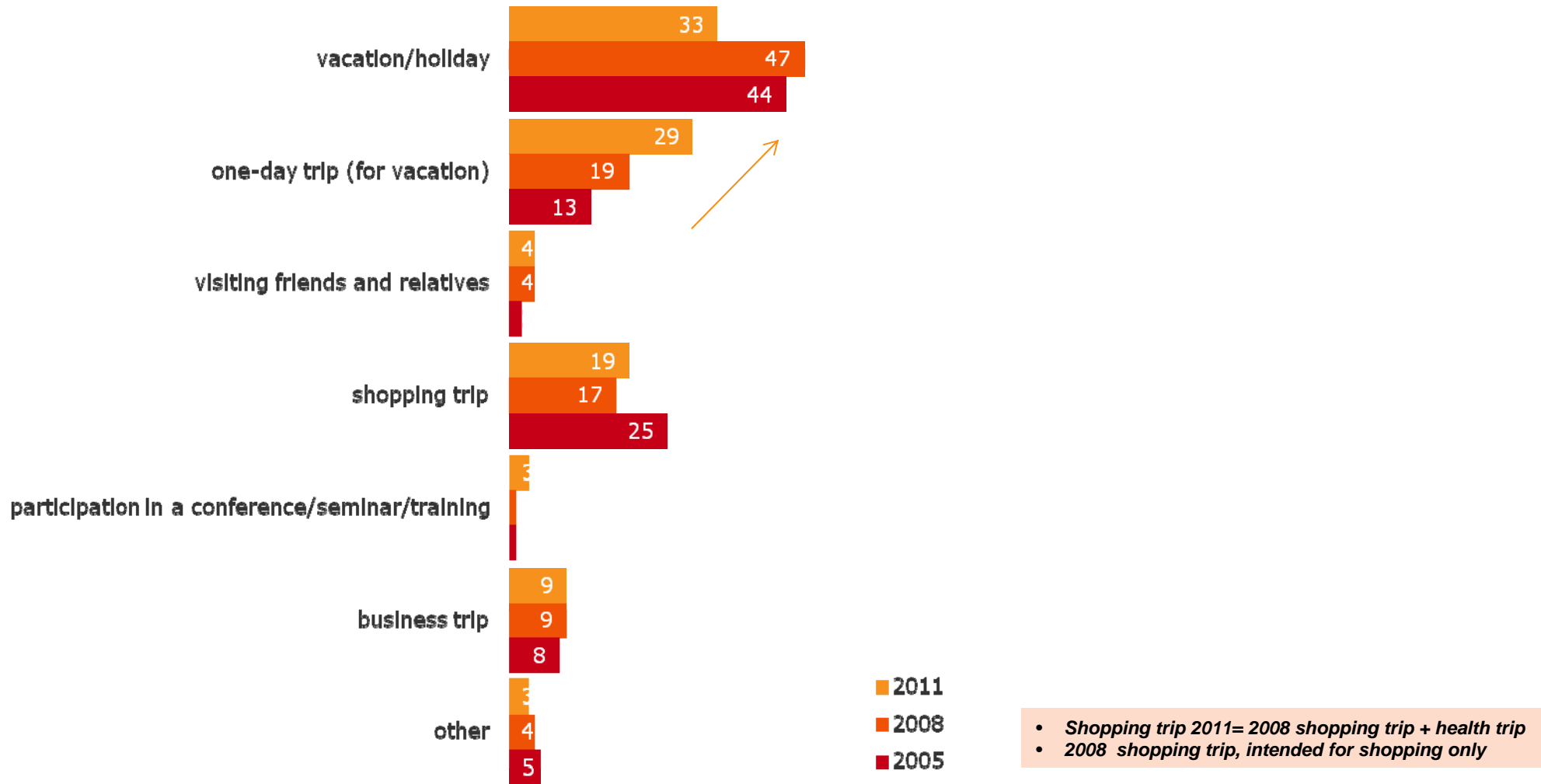


Purpose of the trip

Amount of one-day holiday trips is on the increase



% of all Finnish visitors, n=399

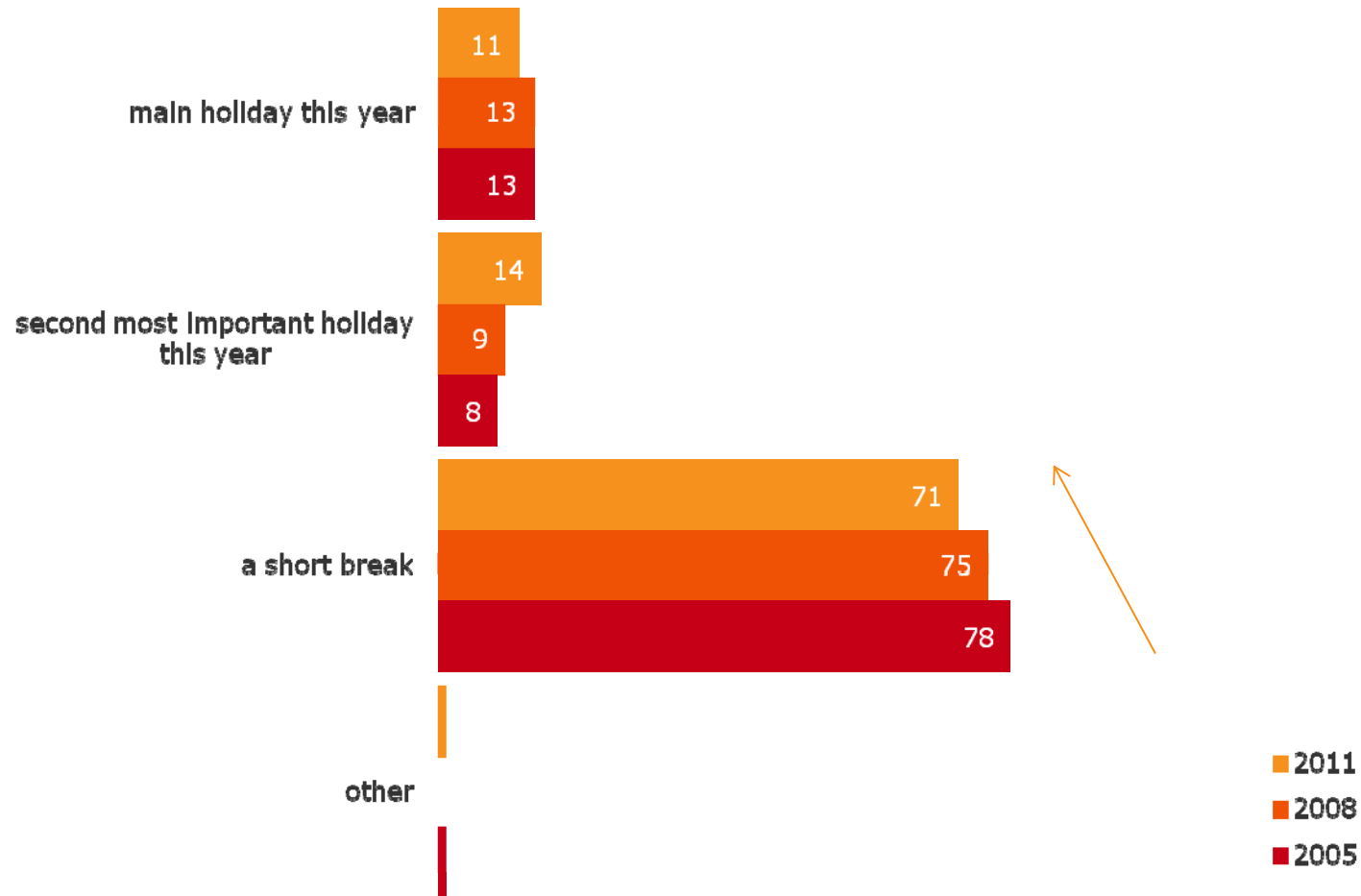


Meaning of a holiday trip

Holiday trip to Tallinn is still a short break



% of all Finnish visitors who are on a vacation or visit friends/relatives (37% in 2011)



Spending the night in Tallinn and accommodation



Spending the night away from home

The proportion of those who spend the night in Tallinn has increased among visitors from Finland



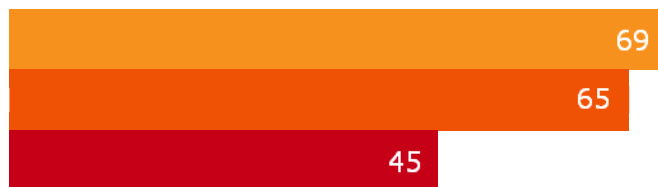
% of all Finnish visitors, n=399

Stayed away from home for at least one night



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

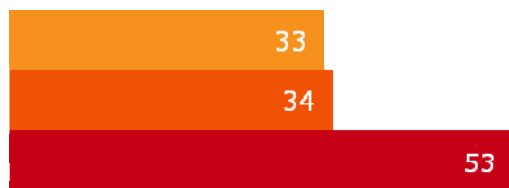
spent the night in Tallinn



spent the night somewhere else in Estonia



spent the night on a ship, train or elsewhere



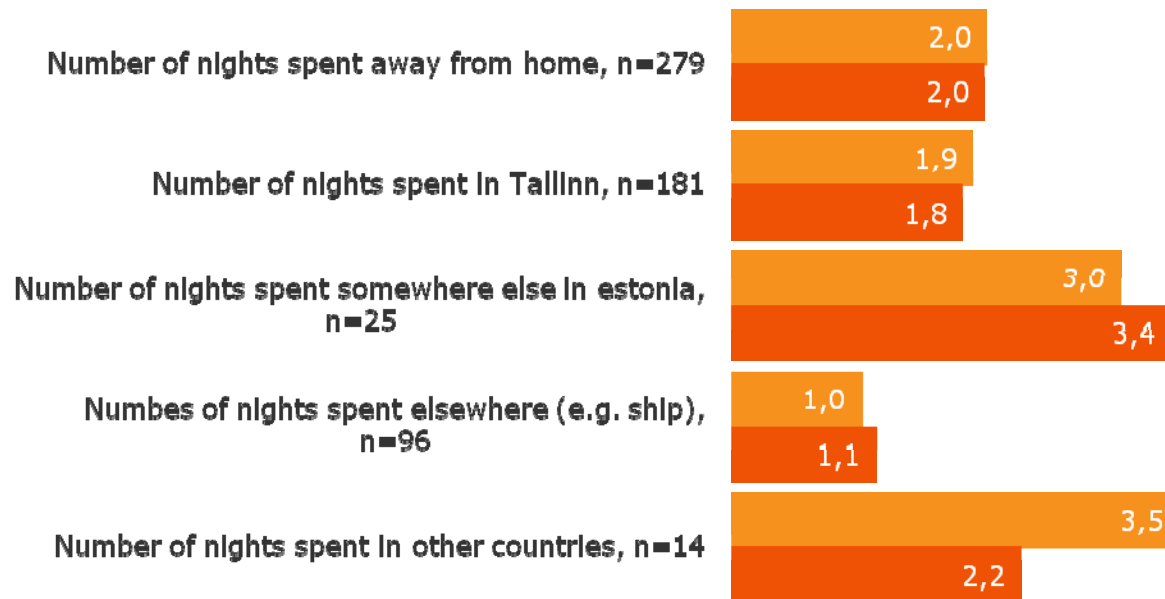
2011
2008
2005

Spending the night away from home

The average length of a trip has not grown



Average number of nights spent away from home among those Finnish visitors who spent the night at an indicated place

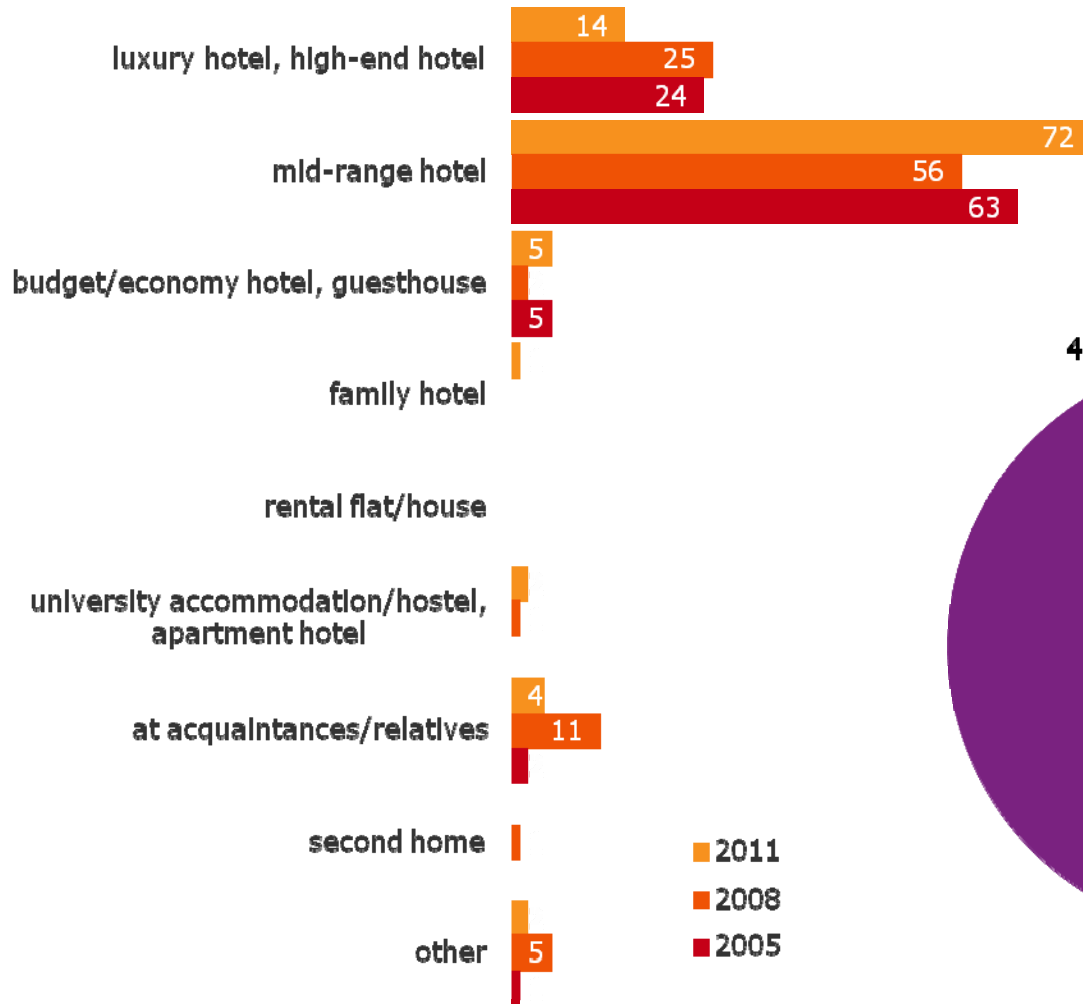


Spending the night in Tallinn

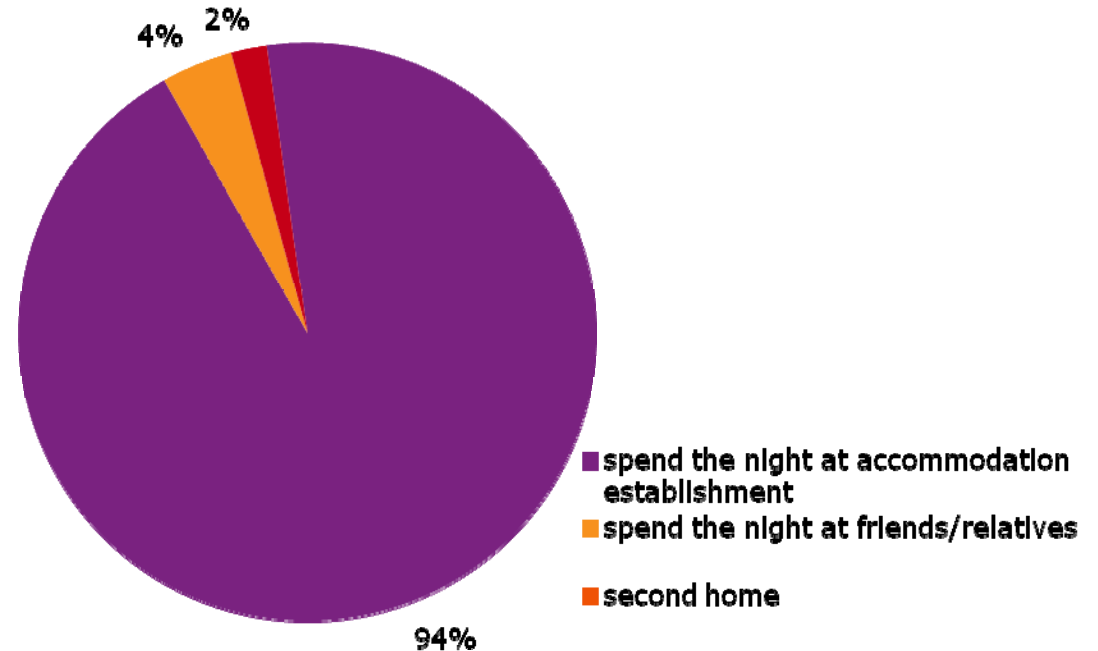
Amount of overnighters in Tallinn and users of mid-range hotels has increased significantly compared to 2008



% of all Finnish visitors who spent at least one night in Tallinn, n=1138



The proportion of paid and free accommodation in Tallinn among Finnish visitors in 2011



Planning a trip to Tallinn

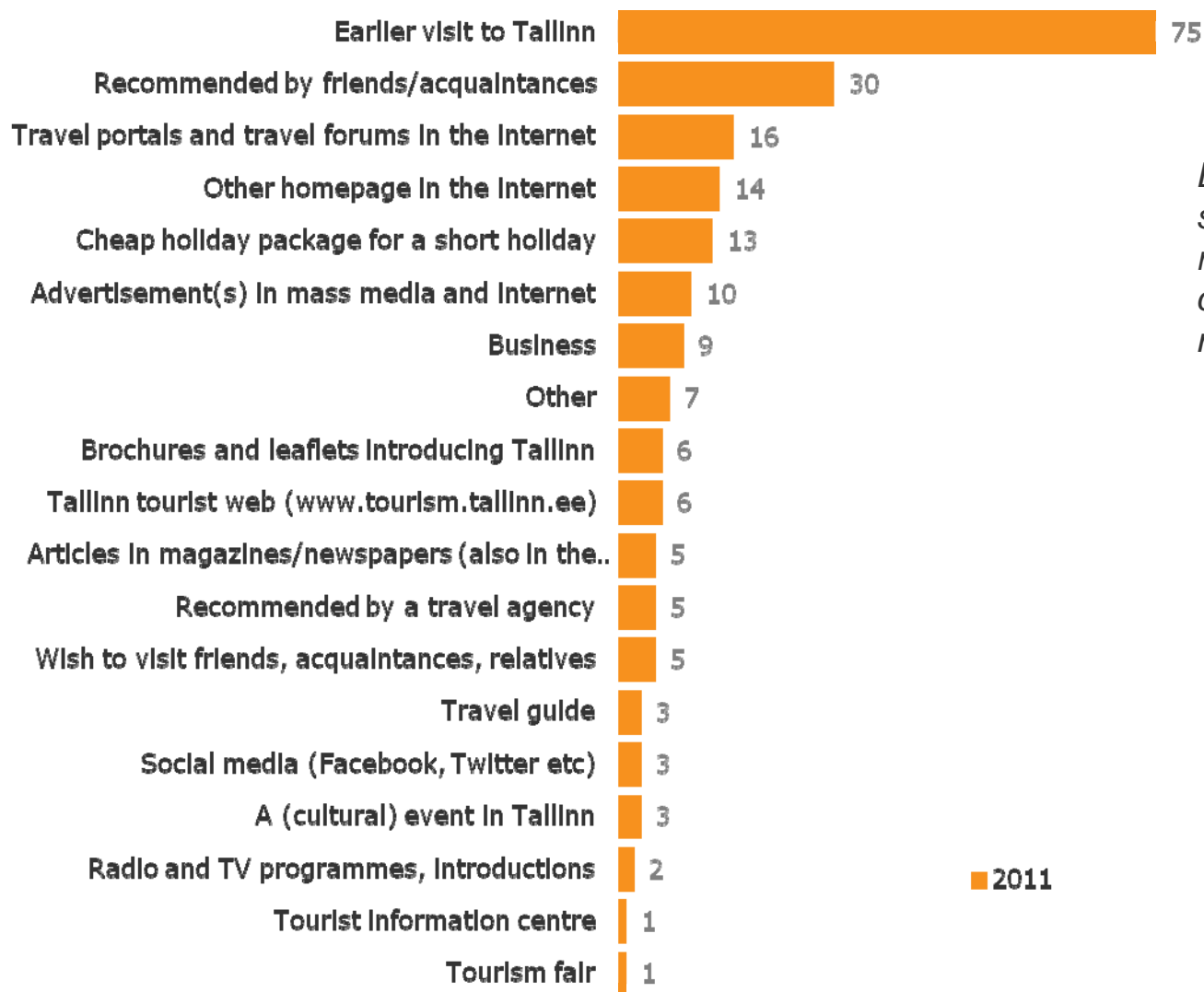


Sources of information on Tallinn

Previous visit is the most important source of information



% of all Finnish visitors, n=399



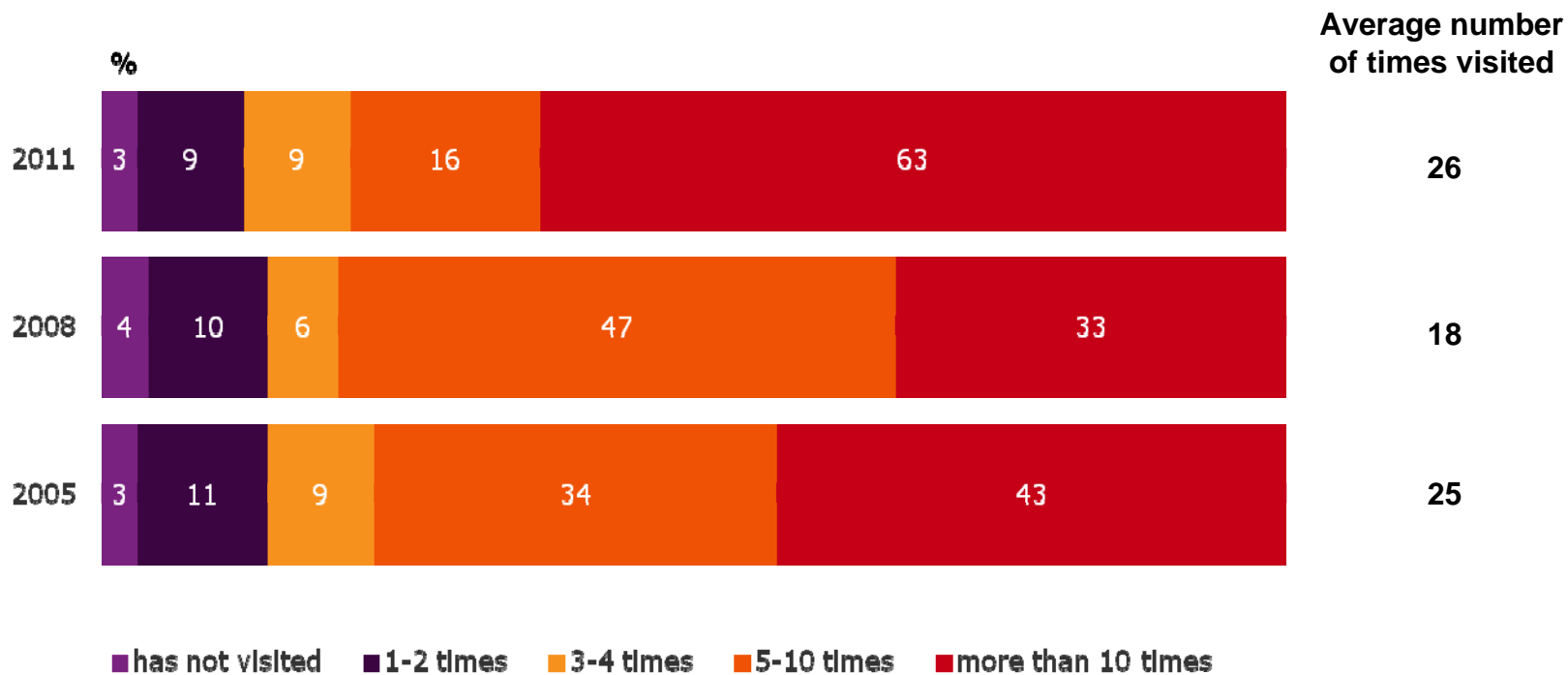
Because the list of information sources was significantly reorganized for the 2011 survey, comparison with previous years is not provided.

The number of previous visits to Tallinn

Most visitors from Finland have been to Tallinn more than 10 times



% of all Finnish visitors, n=399

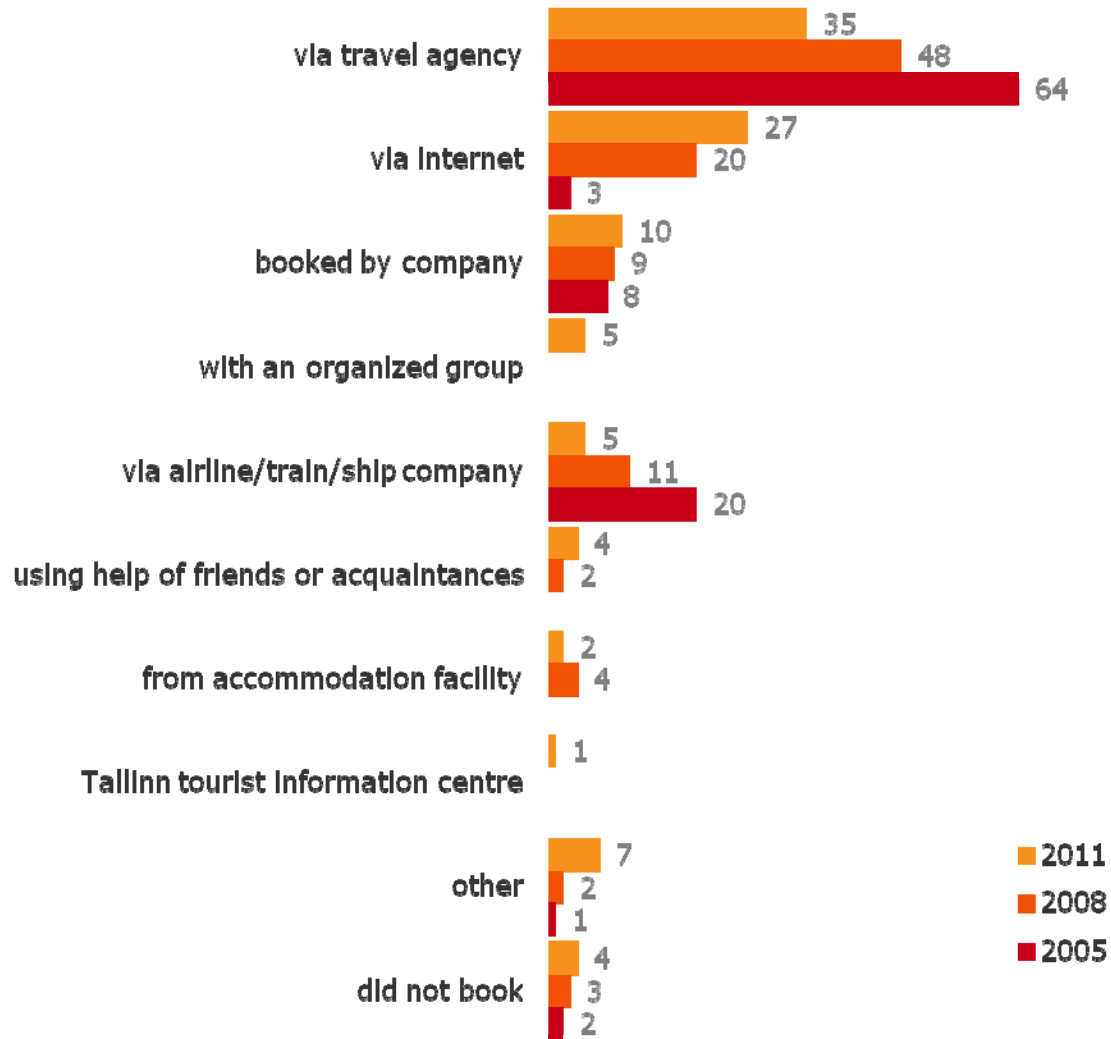


Booking accommodation

The importance of internet is growing, but travel agency is still the most popular among those who book accommodation



% of all Finnish visitors who have spent at least one night in Tallinn and have used accommodation, n= 214



Booking accommodation

Nearly all travellers book accommodation before arrival in Tallinn



% of all Finnish visitors who have spent at least one night in Tallinn; who booked and used accommodation, n=205

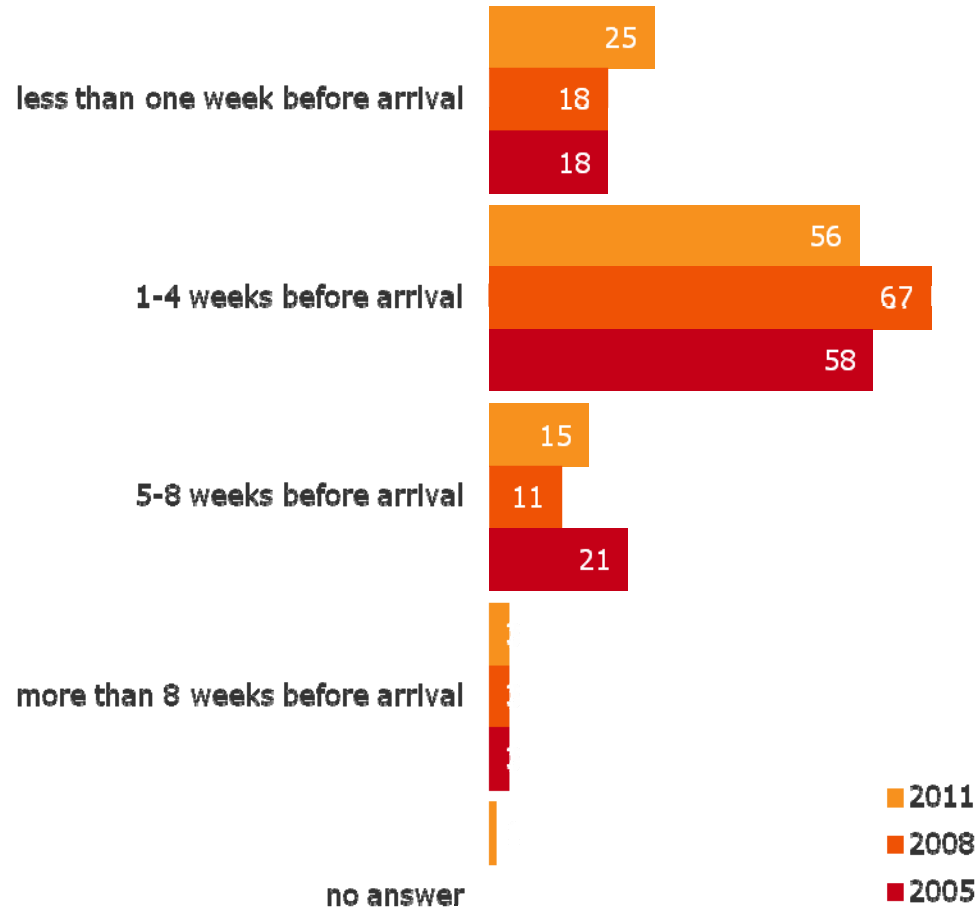


Time of booking accommodation

The proportion of those who book both shorter and longer ahead has increased



% of all visitors who have spent at least one night in Tallinn and booked accommodation before arrival, n=201

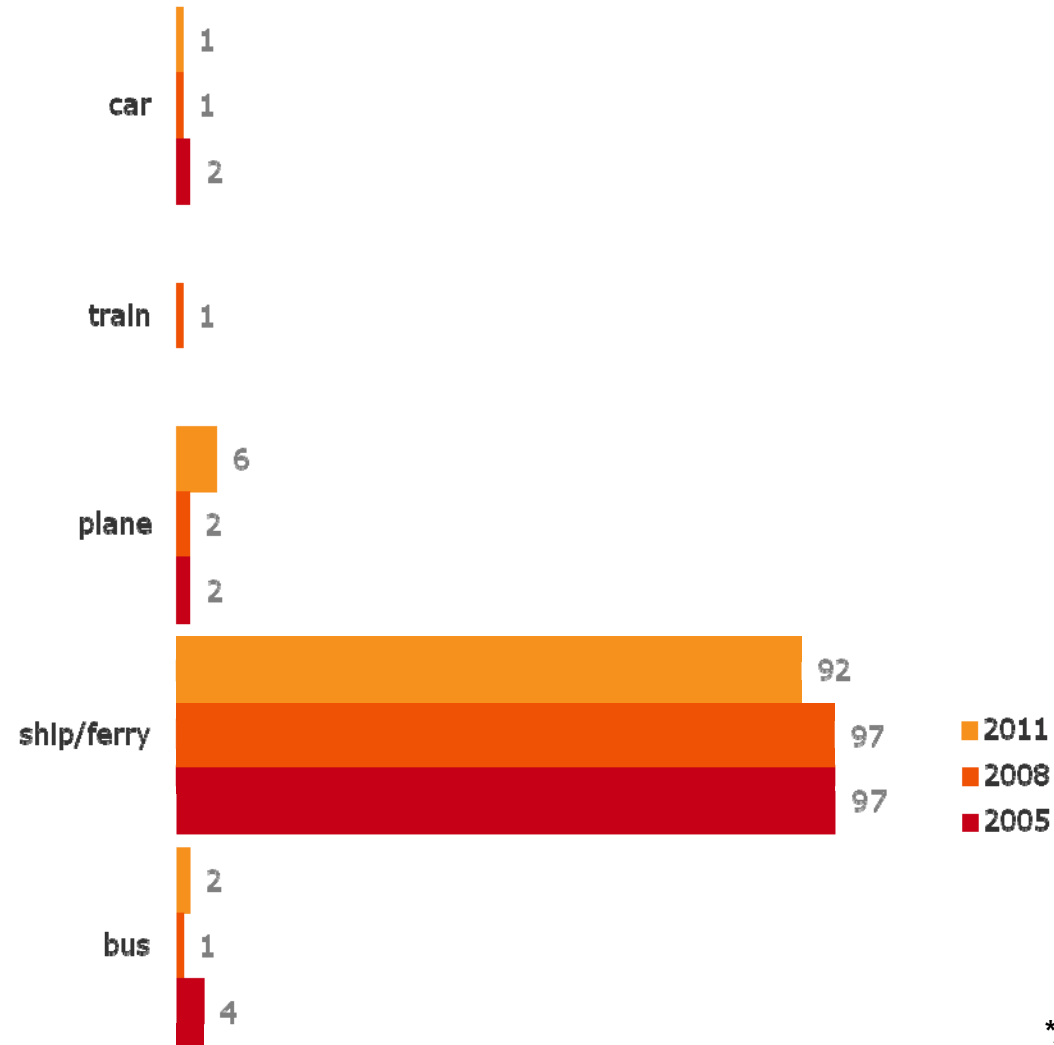


Transport upon arrival in Tallinn

As expected, ship/ferry is the primary means of arrival



% of all Finnish tourists, n=399



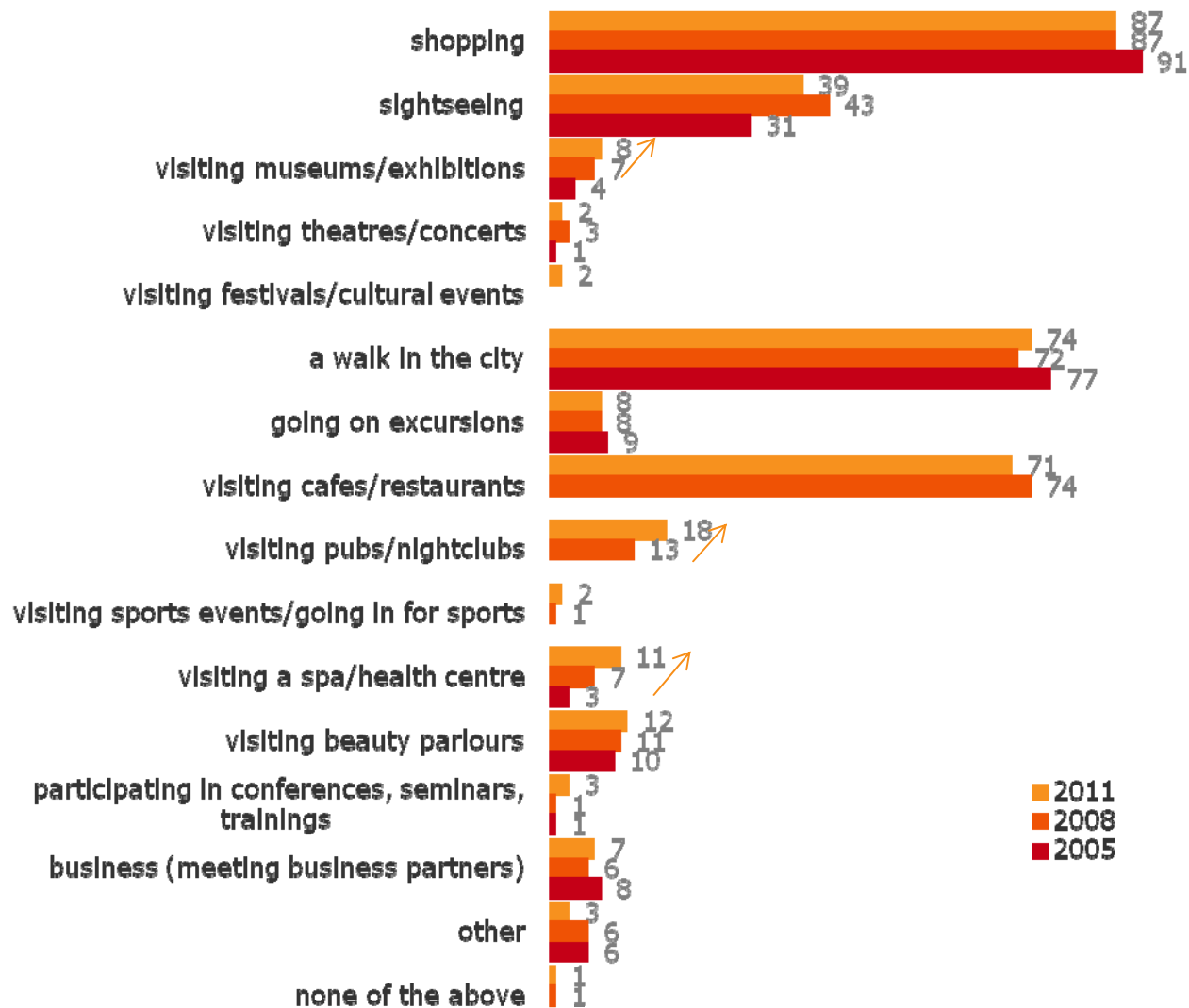
Visit and impressions



Activities in Tallinn:

Visiting nightclubs, spas, beauty parlours and exhibitions has increased

% of all Finnish tourists, n=399



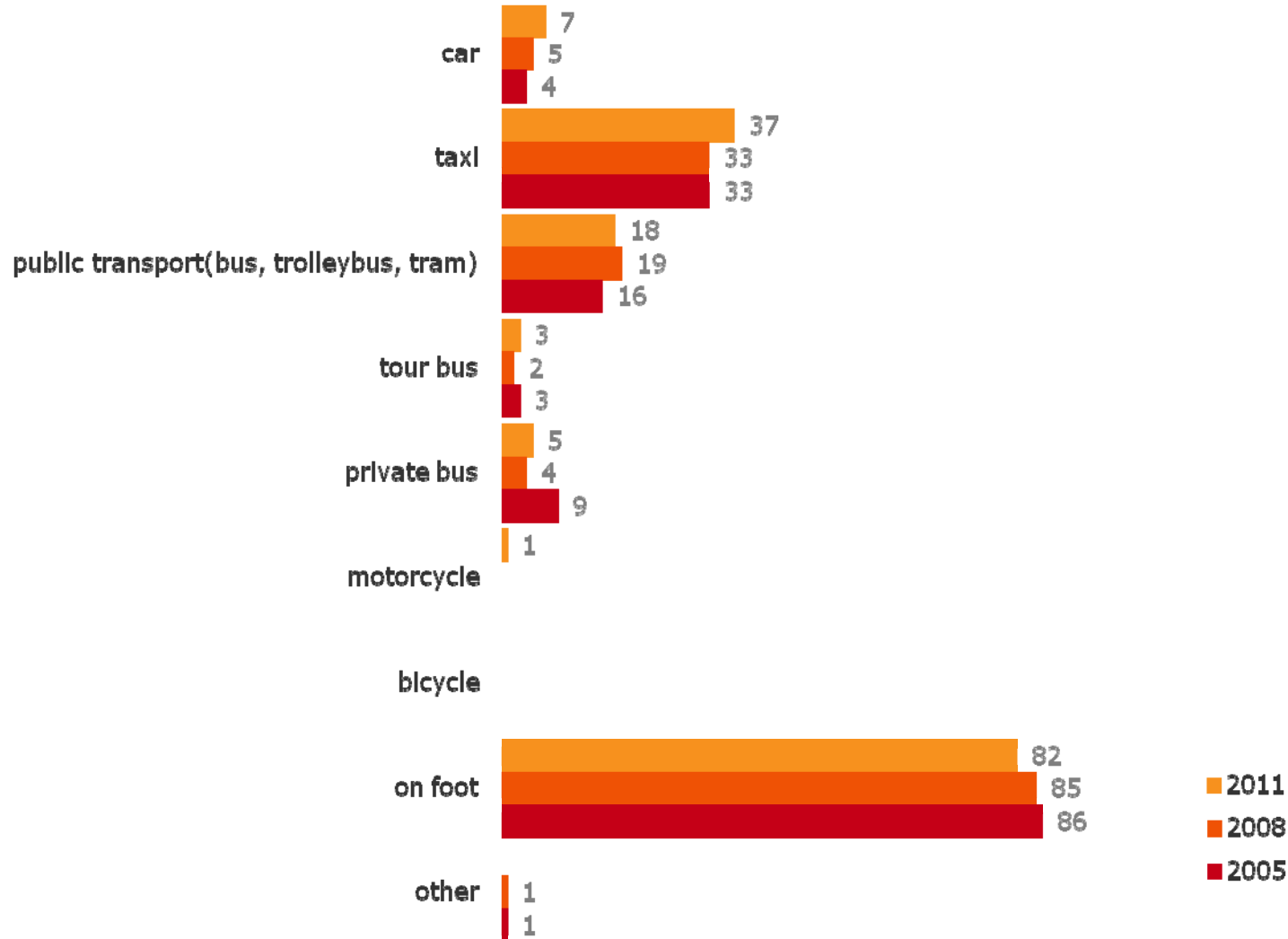
**In 2011 visiting festivals/cultural events was added.
* In 2005, visiting pubs and restaurants was viewed together and visiting nightclubs separately, therefore comparison is impossible.*

Transport used in Tallinn

Moving around on foot is showing a slight decreasing trend, usage of taxi, car and ordered buses has increased



% of all Finnish tourists, n=399



**In 2005 public city bus usage was asked instead of public transport*

Areas visited in Tallinn

Visitors' favourite areas are the old town and the city centre, but Rocca al Mare is gaining popularity as well



% of all Finnish visitors, n=399

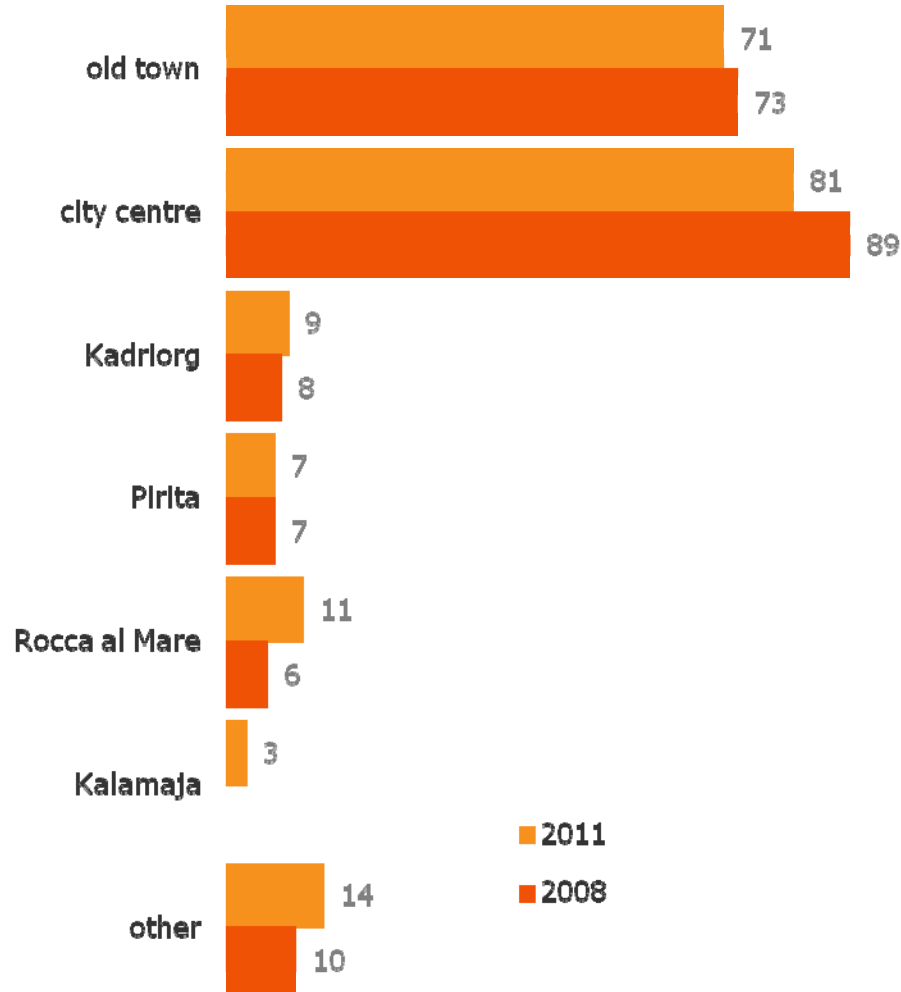
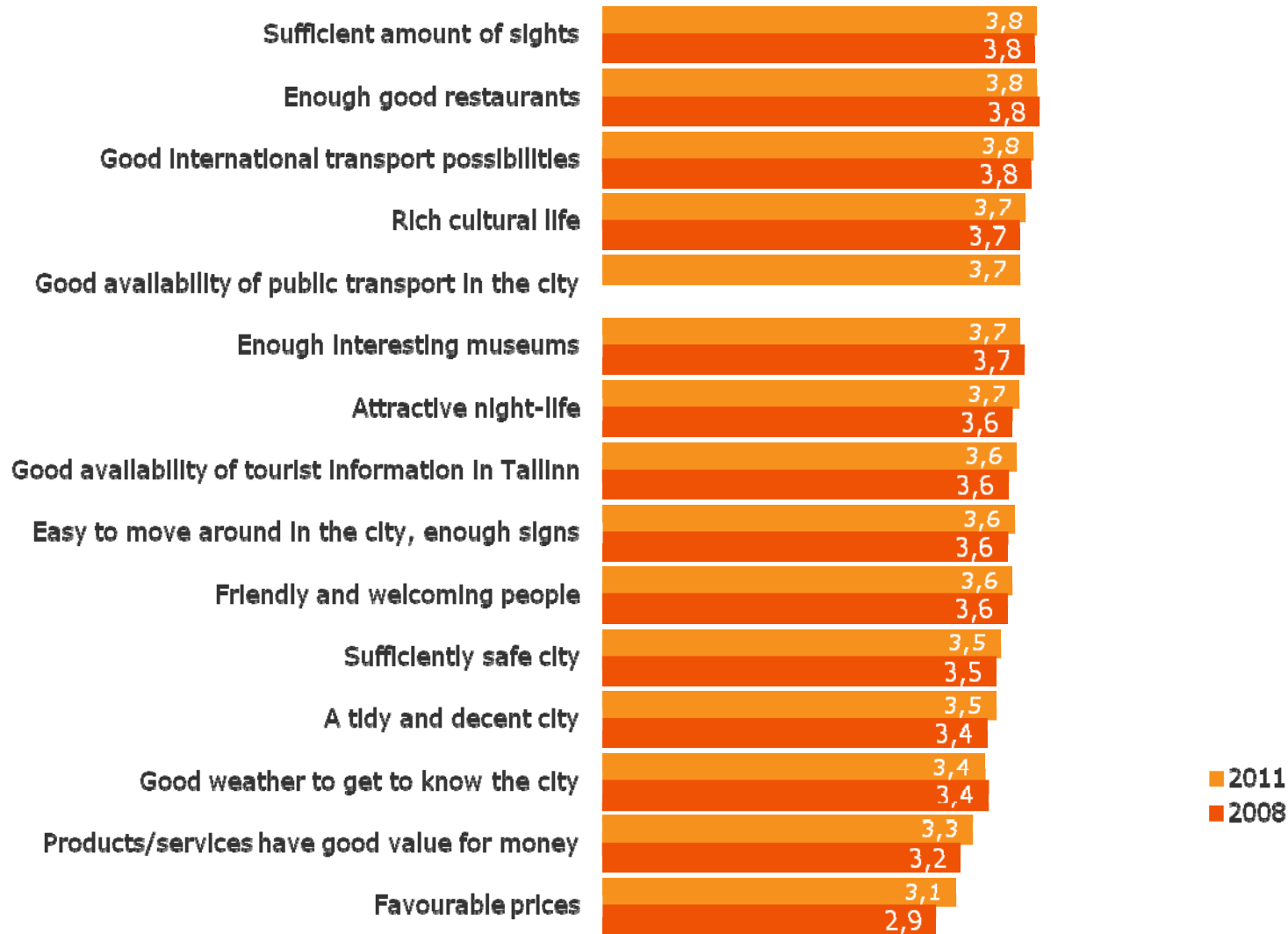


Image of Tallinn (1)

4 image components out of 15 have improved. Others have remained the same



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



*The 2008 survey looked into information on public transport, not availability, which is why comparison is impossible.



Survey into foreign visitors to Tallinn 2005-2011

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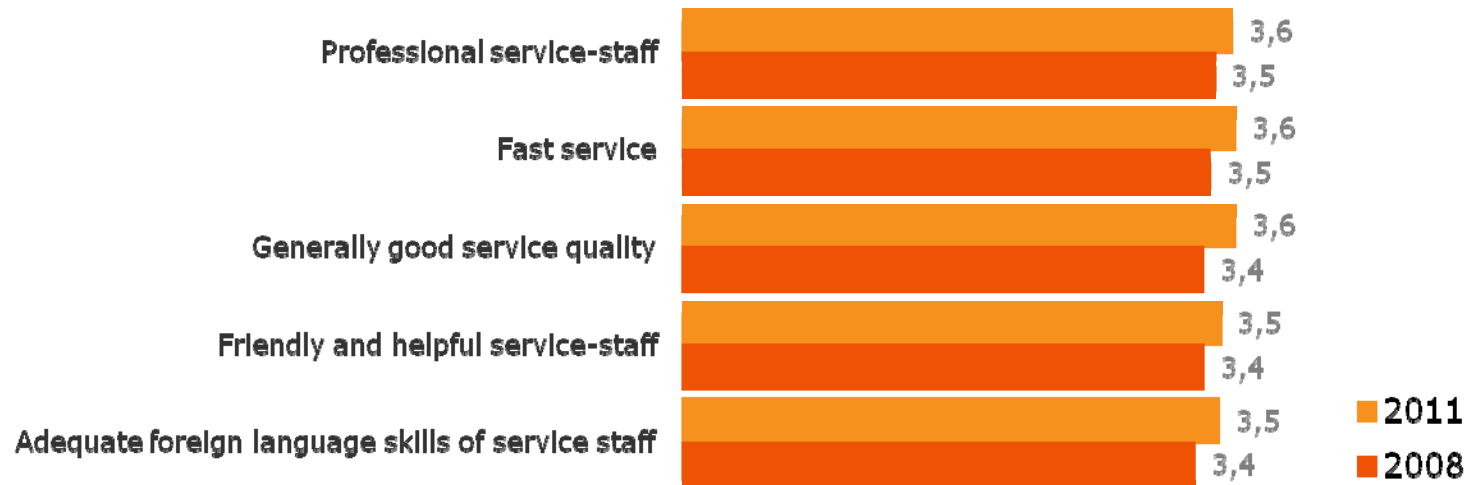


Service culture in Tallinn

Evaluations to service culture have increased in all aspects



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



Positive and negative comments on Tallinn

Open-end comments of Finnish foreign visitors



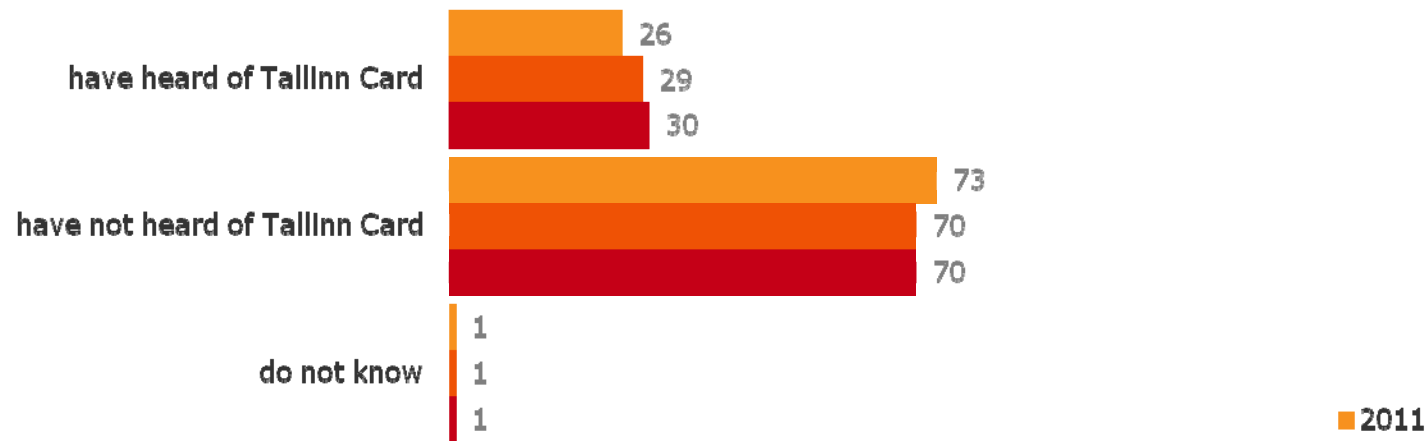
The following summarizes the respondents' open-end comments to questions ...

<i>Would you like to comment on Tallinn – something you are <u>very satisfied</u> with or what was <u>the most positive thing</u> in Tallinn? /74% or 297 respondents replied/</i>	<i>Would you like to comment on something that you are <u>dissatisfied</u> with or something that <u>could be better</u> in Tallinn? /57% or 228 respondents replied/</i>
Old town and its parts (13% of those mentioned)	Do not know – nothing negative (20%)
Positive experience with Estonians (8%)	Unfriendly service-staff (7%)
Restaurants, bars (7%)	Dirty or slippery streets (6%)
Hotels, spas (7%)	Prices have increased (4%)
Cheap prices (6%)	Not safe, pickpockets (3%)
Shops, shopping centres (4%)	Language problem (2%)
Cultural events, -venues, -centres (2%)	Hotels (2%)
Cannot point out anything (8%)	Traffic, too few traffic lights and facilities for the disabled, parking (2%)
	Dirty public transport (1%)

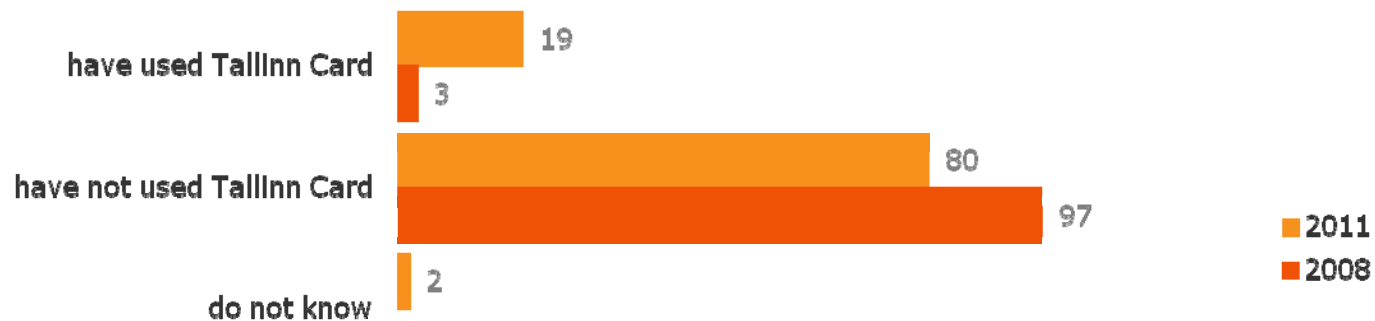
Information on Tallinn Card and its usage

The number of those who have heard about the card has fallen, but the usage has increased significantly

% of all Finnish visitors, n=399



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

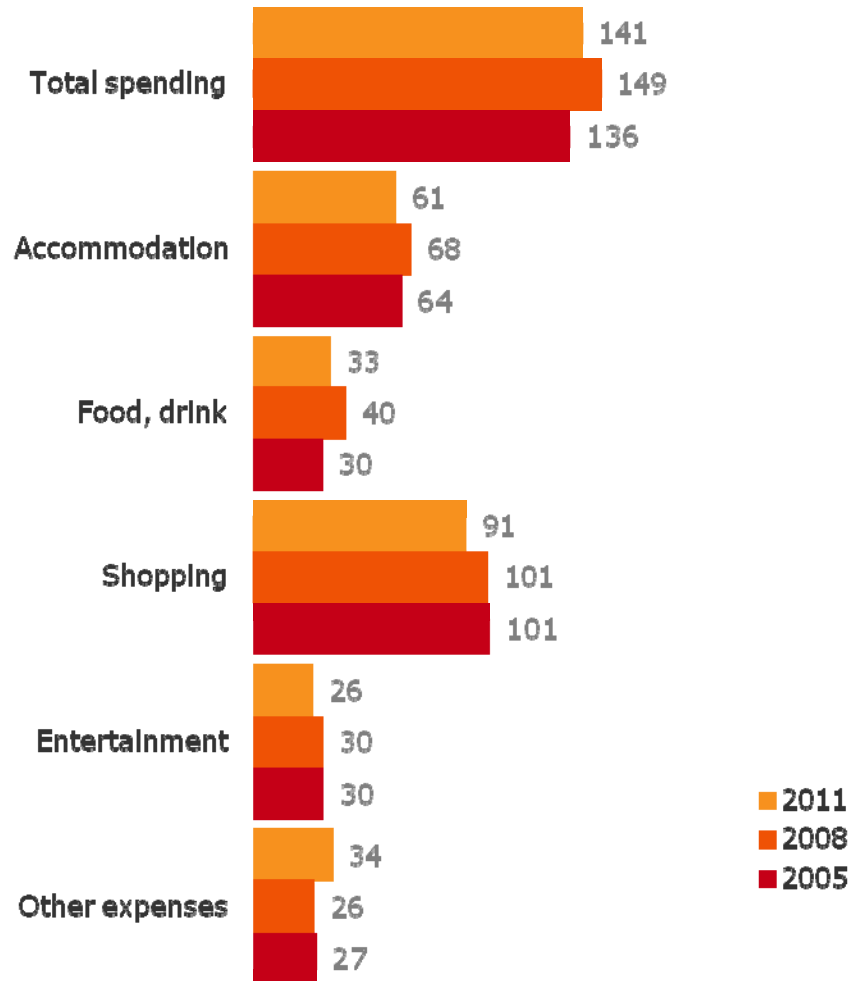


Average spending per person per day

Still remain below the level of 2008



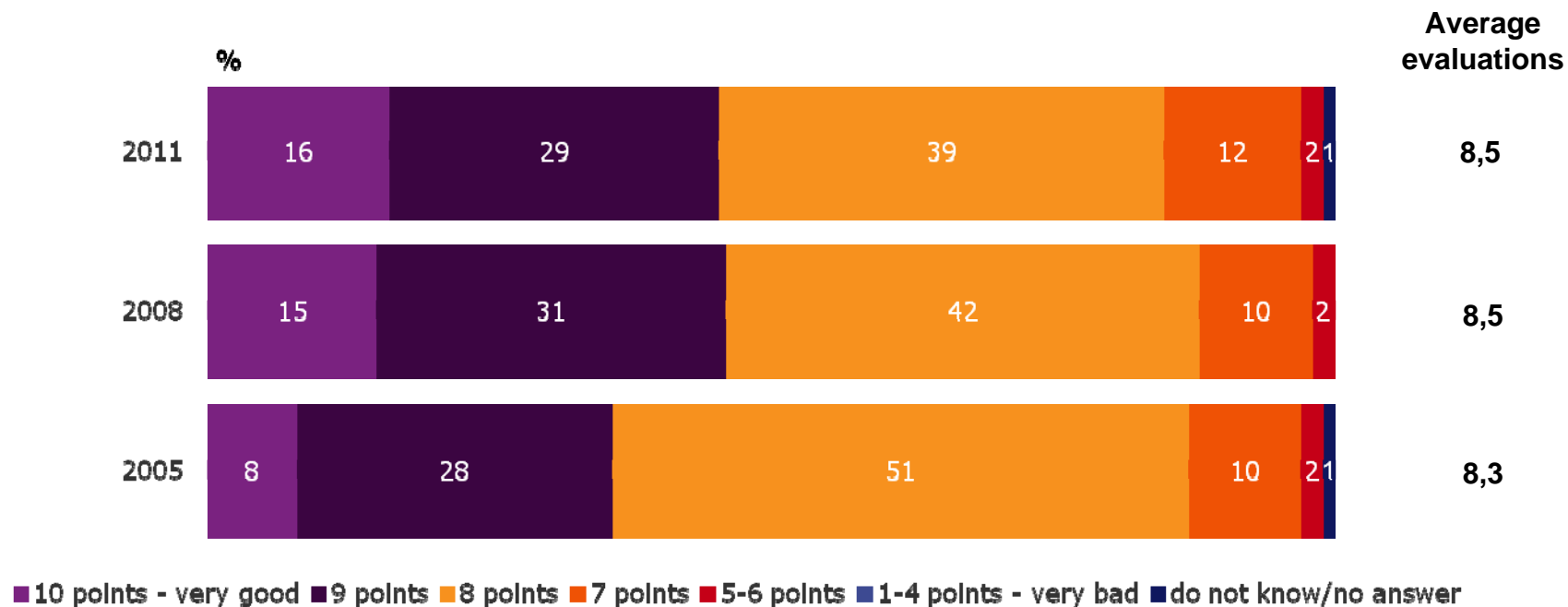
Average spending of Finnish visitors per person per day in EUR



Evaluations to overall impression on trip to Tallinn

Overall impressions are as high as in 2008

% of all Finnish visitors, n=399



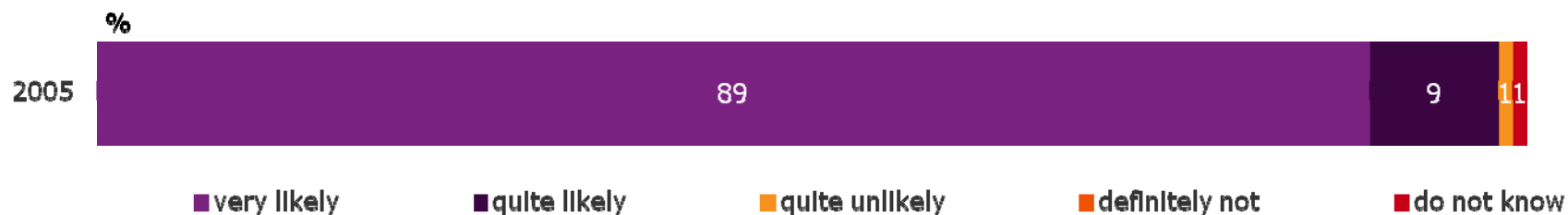
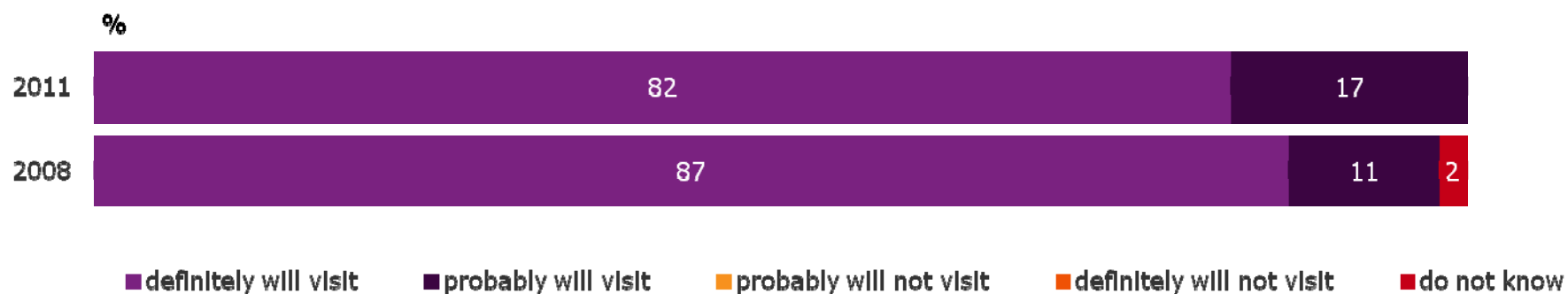
Likelihood of visiting Tallinn again

Likelihood to visit again is still high



% of all Finnish tourists, n=399

The wording of the question was different in the 2005 survey.



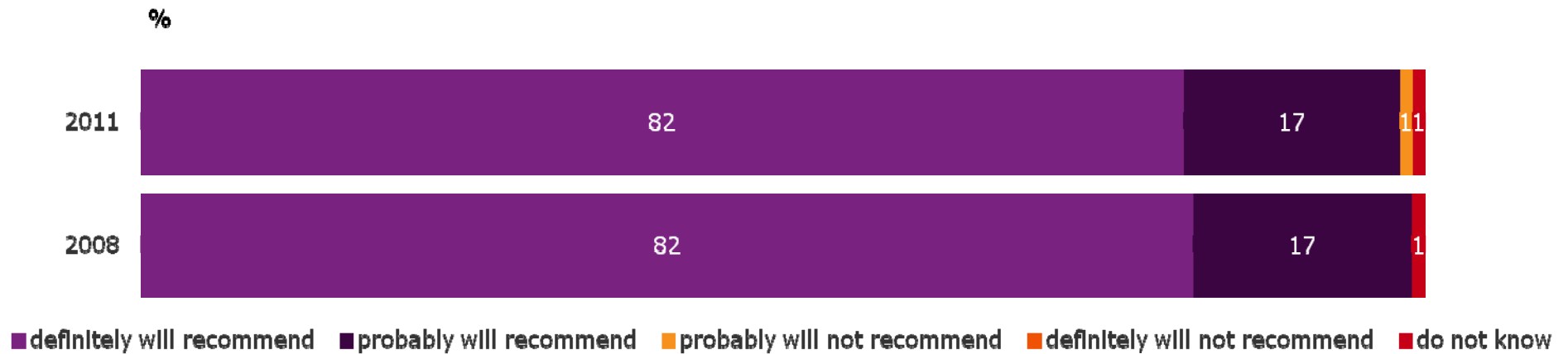
How likely are you to visit Tallinn again in the coming 5 years?

Recommendation communication

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



% of all Finnish visitors, n=399



Appendices



Sample methodology 2011 (1)



- The general population of the survey included all foreign tourists who visited Tallinn in 2011. Altogether, 1751 foreign visitors were interviewed during the survey, 1522 of whom were non-cruise voyagers and 169 cruise voyagers. This year also included turnaround tourists, who accounted for 60 respondents.
- While compiling the sample, respondents were divided according to country of origin and aimed at covering all Tallinn's priority target markets with a sufficient number of respondents. The priority target markets include Finland, Sweden, Norway, United Kingdom, Germany, Russia and Latvia.
- The division of the sample was based on the 2009. statistics of foreign visitors who stayed in Tallinn accommodation establishments. The respondents were divided as follows :
 - by months, thus taking into consideration the seasonal differences of travellers (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 terminal and railway station as well as border crossings in Ikla and Narva



- Size of the sample:
 - 2011 – 399 visitors
 - 2008 – 401 visitors
 - 2005 – 352 visitors
 - 2004 – 349 visitors
- Just like in previous years, 2% of visitors from Finland were interviewed at the airport and 98% in the harbour.

Sample methodology 2011 (2)



- 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 proportion of cruise voyagers.
- Here follows the division of planned and actual sample in accordance with countries and “exit gates (H – harbour, A – airport, L – land).

Planned sample (2011)

	H	A	L	Total
Finland	395	25	0	420
Sweden	155	55	0	210
Norway	20	94	11	125
United Kingdom	35	90	10	135
Germany	33	80	22	135
Russia	23	40	137	200
Latvia	2	34	64	100
Other countries	80	50	45	175
Total:	743	468	289	1500

Actual sample (2011)

	H	A	L	Total
Finland	369	30	0	399
Sweden	149	60	0	209
Norway	31	83	17	131
United Kingdom	53	78	13	144
Germany	40	79	24	143
Russia	35	42	132	209
Latvia	12	24	63	99
Other countries	84	55	49	188
Total:	773	451	298	1522

Data collection



- The survey was conducted in the form of personal interviews using PAPI method (*Paper and Pencil Interviewing*). The average duration of one interview was 20 minutes. When needed, the interviewer used answer cards.
- The interviews were conducted in Finnish, English, Russian, German and Swedish
- The quality of filling in the questionnaires and data-entry was guaranteed by the following measures:
 - after the monthly interview period had ended, **the completion of paper questionnaires** was visually verified by fieldwork manager of TNS Emor;
 - the visually verified paper questionnaires were entered with the help of a specialised entry programme. The entry programme was developed with the help of Ci3 software;
 - **Mechanical verification** of the quality of the completed questionnaires was conducted in the entry programme – the programme used filters, cycles, intervals of responses and means of checking the logic of the responses. The means described above also help to avoid errors during data-entry. By using the numbering of the questionnaires, the program ensures that no questionnaire is entered twice.
- The interviews were conducted by 10 interviewers of AS Emor who had received respective training. All in all, the interviewers made 2893 contacts (within the main survey) and from those:
 - the interview was conducted in 1523 cases
 - the quota was full in 624 cases
 - 268 did not belong to the target group
 - 478 refused the contact.
- In year 2011 and January 2012, the interview periods were the following: 26 January – 2 February, 17 – 25 February, 8 – 15 March, 11 – 18 April 20 – 27 May, 11 – 18 June, 3 – 12 July, 24 – 31 August, 15 – 23 September, 21 – 28 November, 11 – 20 December, 2 – 9 January, 2012.
- Cruise voyagers were interviewed during the May, June, July and August interview periods.
- Turnaround tourists were interviewed during all turnaround trips which took place in Estonia in year 2011: June 5, July 3, August 14 and 28 and September 11.

Data collection statistics



Place of interview	
harbour	1002
airport	451
Ikla border crossing	171
Narva border crossing	114
Train station	12

Month of interview	
January	66
February	77
March	114
April	93
May	136
June	258
July	253
August	214
September	229
October	118
November	156
December	37

Day of the week of interview	
Monday	184
Tuesday	221
Wednesday	185
Thursday	194
Friday	277
Saturday	292
Sunday	338

Time of conducting the interview	
until 12.00	294
12.00 - 14.00	414
14.00 - 17.00	567
after 17.00	407

Weather on the day the interview was conducted	
windy	654
cold	298
sunny	803
rainy	246
cloudy, dry	316

Survey into foreign visitors to Tallinn 2005-2011

Data weighing (1)



In the current report, data has been weighed according to the following weighing methods:

I weighing method:

Since May the 1st 2004, the number of nights spent in Tallinn's official accommodation has been used as the means of the country's statistics. Those who had free accommodation and one-day travellers have been added to the country's statistics (proportions in terms of countries according to the 2011 survey data on foreign visitors to Tallinn).

II weighing method:

In addition to the country's statistics and the results on free accommodation and one-day visitors, statistics on cruise voyagers (provided by Port of Tallinn) have also been taken into consideration while weighing.

In order for the results to be comparable, data has been presented using weighing method I, but evaluations on the population (i.e. evaluations on the number and inter-nationality proportions of foreign visitors to Tallinn) have been presented using weighing method II.

Here follow the tables containing overall numbers that serve as the basis for weighing data (method II).

Data weighing (2)



NUMBER OF ACCOMMODATED FOREIGN VISITORS, year 2011 (Statistics Estonia)					
	2011 I Q	2011 II Q	2011 III Q	2011 IV Q	TOTAL
Finland	93988	164668	178675	158122	595453
Sweden	9036	18850	21722	14373	63981
Russia	38136	30346	33923	40261	142666
Latvia	8180	11516	12526	12283	44505
United Kingdom*	8986	18923	22355	14116	64380
Germany	4914	23173	36149	8972	73208
Norway	6085	12478	14311	12580	45454
Spain*	1230	5388	15006	2488	24112
Other countries (incl. Spain)	33924	91872	127735	50583	304114
Total countries of residents (excl. Estonia)	203249	371826	447396	311290	1333761

EVALUATIONS TO THE TOTAL NUMBER OF FOREIGN VISITORS TO TALLINN in 2011, ACCOMMODATION (excl. cruise)			
	paid + free accommodation	one-day visitors	TOTAL
Finland	634811	496759	1131570
Sweden	71808	36174	107982
Norway	49033	4033	53066
United Kingdom	69902	9986	79888
Germany	87990	4534	92524
Russia	217479	81667	299146
Latvia	69107	6918	76025
Spain	26791	5371	32162
Other countries	325206	83858	409064
Total:	1552127	729300	2281427

Survey into foreign visitors to Tallinn 2005-2011

Data weighing (3)



EVALUATIONS ON THE OVERALL NUMBER OF VISITORS TO TALLINN, year 2011, seasonality (excl. cruise voyagers)					
	I quarter	II quarter	III quarter	IV quarter	TOTAL
Finland	178610	312927	339546	300487	1131570
Sweden	15250	31814	36660	24258	107982
Norway	7104	14567	16708	14687	53066
United Kingdom	11151	23481	27740	17516	79888
Germany	6211	29287	45687	11339	92524
Russia	79965	63630	71131	84420	299146
Latvia	13973	19673	21397	20982	76025
Spain	1641	7187	20015	3319	32162
Other countries	45631	123577	171817	68039	409064
Total:	359536	626143	750701	545047	2281427

Comparison of weighed and unweighed samples 2011, no cruise voyagers

	Evaluation to overall population	% of population	Weighed results	% of weighed sample	Unweighed results	% of unweighed sample
Finland	1131570	50%	729	50%	399	26%
Sweden	107982	5%	70	5%	209	14%
Norway	53066	2%	34	2%	131	9%
United Kingdom	79888	4%	51	3%	144	9%
Germany	92524	4%	59	4%	143	9%
Russia	299146	13%	193	13%	209	14%
Latvia	76025	3%	49	3%	99	7%
Spain	32162	1%	21	1%	12	1%
Other countries	409064	18%	263	18%	176	12%
Total:	2281427	100%	1469	100%	1522	100%

Survey into foreign visitors to Tallinn 2005–2011

Further information



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

The client: Karen Alamets

Project manager of the survey

plan and report: Esta Kaal, Annette Schultz

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Interview coordination: Marju Kalve

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