

Overview

Cruise Passenger and Crew Surveys

Tallinn

Survey

2012

- **Survey Period: June – September, 2012**
- **Cruise Calls:**
 - **June: 20, 22**
 - **July: 1, 6, 9, 13, 25**
 - **August: 7, 15**
 - **September 16**
- **Number of Surveys Returned**
 - **Passengers: 2,923**
 - **Crew: 761**

Survey

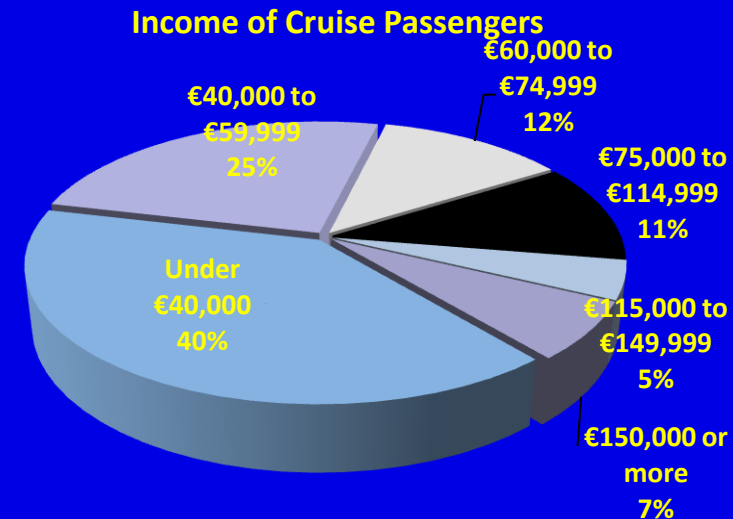
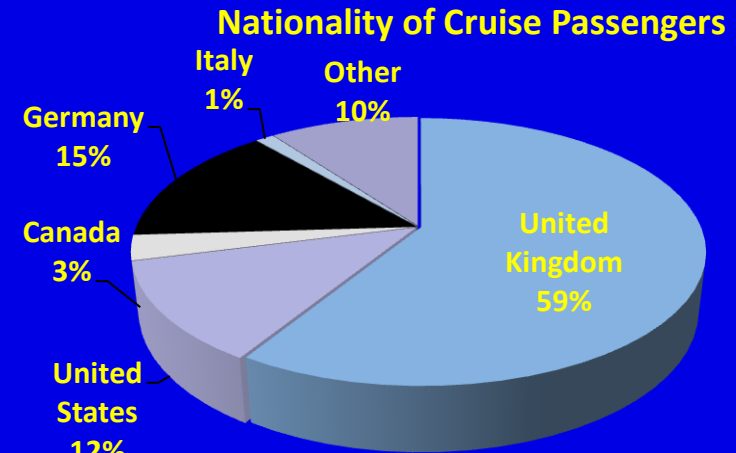
2012

- **Cruise passengers were very satisfied with all aspects of their call at Tallinn. Among the highest scoring attributes were:**
 - **Friendliness of residents**
 - **Courtesy of shop employees**
 - **Historic sites and museums**
 - **Initial shoreside welcome**
 - **Shore excursion and guide**
- **Total expenditures by transit passengers, including tours, averaged €56.70 per onshore passenger visit**
 - **This is 7% higher than the European average of €53.13**
- **Major expenditure categories included:**
 - **Shore excursions: €26.71 per onshore passenger visit**
 - **Local crafts and souvenirs: €11.59**
 - **Clothing: €5.83**
 - **Food and beverages: €4.81**

Survey

2012

- **59% of Tallinn passengers were from the United Kingdom.**
- **Another 15% were German and 15% were from North America.**
- **The average Tallinn passenger had a household income of nearly €60,150.**
 - This is slightly (1%) higher than the average income of European passengers €59,400.
 - 37% reported income of between €40,000 and €74,999.
 - 12% have a household income in excess of €115,000.
- **The average Tallinn cruise passenger was about 61 years of age.**
 - 34% are between the ages of 45 and 64.
 - 54% are 65 years of age or older.
 - Only 4% are under the age of 25.

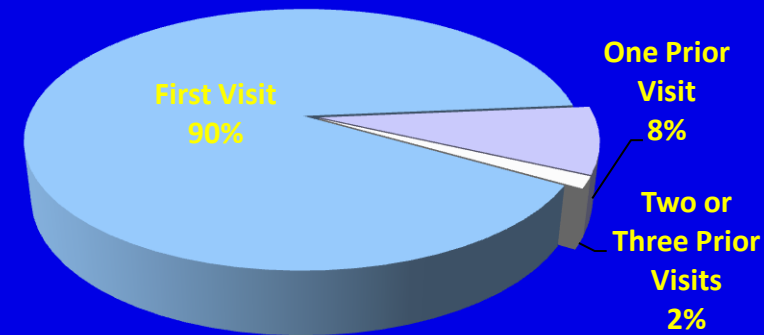


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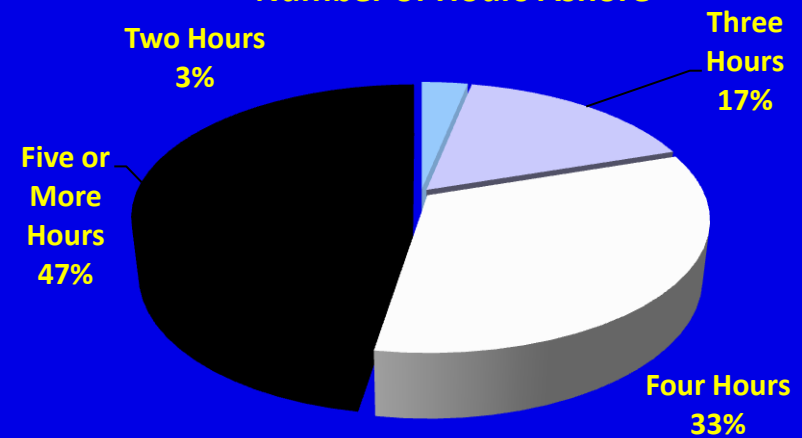
2012

- **The average cruise party consisted of 2.5 passengers.**
 - European Average: 2.5 passengers
- **This was the first visit to Tallinn for the vast majority (90%) of passengers.**
 - European Average: 84%
- **For most of the remaining passengers this was their second visit.**
- **97% of the survey respondents reported that they went ashore in Tallinn.**
 - European Average: 87%
- **The typical passenger spent an average of 4.5 hours ashore.**
 - The European average is 4.8 hours.
 - 80% spent 4 or more hours ashore.
 - The average length of a purchased onshore tour was 3.9 hours (Euro avg.: 4.0 hours).

Number of Visits to Tallinn



Number of Hours Ashore

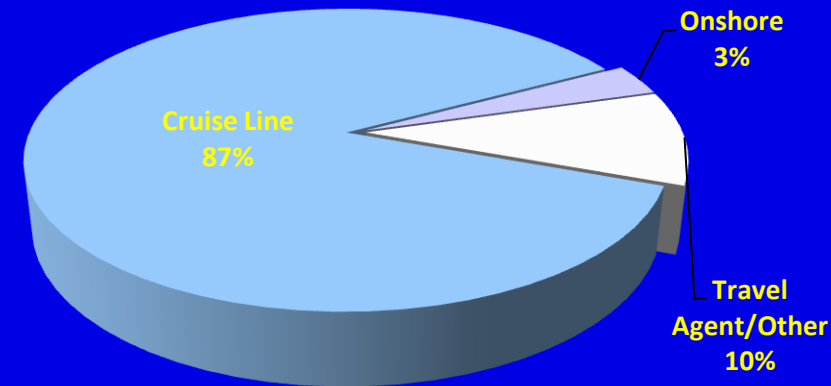


Survey

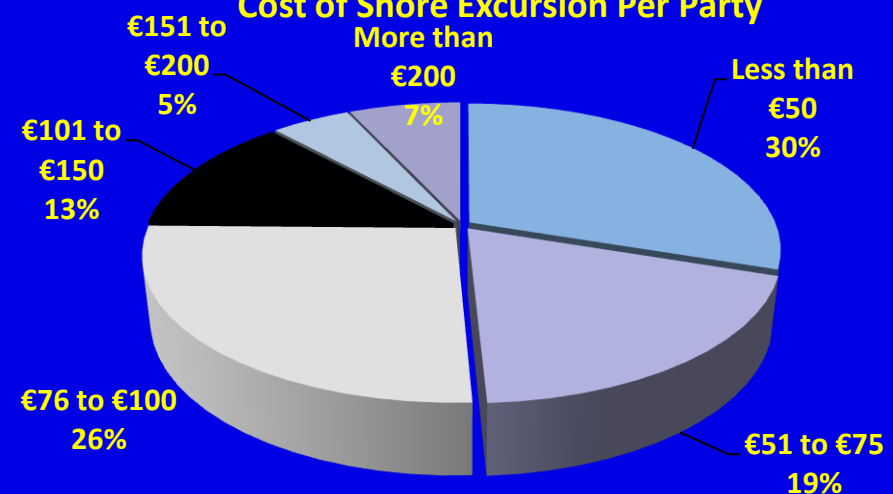
2012

- **48% of the cruise passengers that went ashore purchased a shore excursion.**
 - This is below the European average of 56%.
- **Of these, 87% reported that they purchased their tour from the cruise line.**
- **The typical shore excursion party included an average of 2.1 passengers.**
- **Tallinn passengers who purchased a tour spent an average of €118 per party or €56 per passenger for their tour.**
 - This is 40% higher than the European average of €40 per passenger.

Tour Purchased From



Cost of Shore Excursion Per Party



Survey

2012

- **Passengers reported spending another €29.99 per passenger while ashore for other goods.**
 - **This is about 4% lower than the European average of €31.12.**
 - **66% made purchases of local crafts and souvenirs with an average expenditure of €17.56 per purchase and a weighted average of €11.59 per passenger.**
 - **59% of the passengers made purchases of food and beverages with an average expenditure of €8.14 per purchase and a weighted average across all onshore purchasers of €4.81.**
- **Including the cost of shore excursions made by the 48% of onshore passenger visits, all passengers ashore spent an average of €56.70 during their visit to Tallinn.**
 - **This is 7% higher than the European average of €53.13**

Purchase Categories	Share of All Onshore Purchasers	Average Spend per Purchase	Weighted Average Spend per Pax Visit	European Average
Food and Beverages at Restaurants & Bars	59.1%	€ 8.14	€ 4.81	€ 3.45
Taxis/Ground Transportation	6.6%	€ 9.30	€ 0.62	€ 1.45
Watches & Jewelry	9.1%	€ 44.84	€ 4.06	€ 1.92
Clothing	23.2%	€ 25.12	€ 5.83	€ 3.80
Local Crafts & Souvenirs	66.0%	€ 17.56	€ 11.59	€ 6.39
Entertainment/Night Clubs/Casinos	0.2%	€ 7.26	€ 0.01	€ 0.05
Museums & Galleries	8.2%	€ 4.30	€ 0.35	€ 0.78
Other Purchases	59.1%	€ 14.89	€ 2.72	€ 13.29
Total Other Expenditures per Passenger Ashore			€ 29.99	€ 31.12
Shore Excursions	47.6%	€ 56.06	€ 26.71	€ 22.01
Total Expenditures per Passenger Ashore			€ 56.70	€ 53.13

Survey

2012

- **Passengers felt very satisfied with all aspects of their visit to Tallinn.**
 - **Just about all passengers (96%) felt that their visit met or exceeded their expectations and were extremely satisfied with their overall visit with a mean score of 4.49.**
 - **Friendliness of residents and courtesy of shop employees received the highest mean scores of 4.45 each. 90% reported that they were either extremely or very satisfied with both aspects.**
 - **Historic sites and museums and variety of things to see and do were next with scores of 4.35 and 4.26, respectively (very satisfied).**
 - **As indicated in the table, Tallinn satisfaction scores exceeded the European average in all categories.**

Attribute	Europe Average	Mean Score	Extremely Satisfied	Very Satisfied	Somewhat Satisfied	Not Too Satisfied	Not At All Satisfied	Satisfied	Not Satisfied
Initial Shoreside Welcome	4.00	4.19	45%	35%	17%	2%	1%	97%	3%
Guided Tour	4.07	4.18	45%	35%	13%	4%	3%	93%	7%
Historic Sites/Museums	4.00	4.35	49%	38%	11%	1%	0%	99%	1%
Variety of things to see and do	3.74	4.26	44%	40%	13%	2%	0%	98%	2%
Friendliness of Residents	4.08	4.45	58%	32%	9%	1%	1%	98%	2%
Overall Shopping Experience	3.69	4.22	42%	41%	16%	1%	0%	99%	1%
Courtesy of Employees	4.15	4.45	56%	34%	9%	1%	0%	99%	1%
Overall Prices	3.19	3.88	28%	41%	24%	6%	1%	93%	7%
Local Transportation	3.78	4.14	43%	38%	13%	2%	4%	94%	6%
Overall Visit	4.01	4.49	57%	36%	6%	1%	0%	99%	1%
Visit Met Expectations	3.72	4.18	37%	48%	11%	2%	2%	96%	4%
			Greatly Exceeded	Exceeded	Met	Fell Short	Fell Far Short	Met or Exceeded	Fell Short

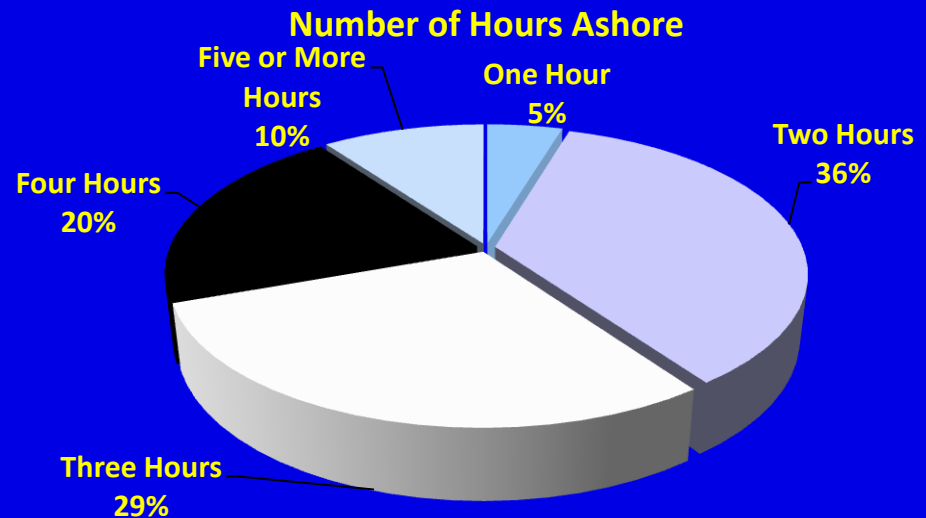
Scale is 1 to 5 with 5 being the highest score. The mean scores can be interpreted as follows: Extremely Satisfied: greater than 4.5; Very Satisfied: 3.5 – 4.5; Somewhat Satisfied: 2.5 - 3.5; Not Too Satisfied: 1.5 – 2.5; Not At All Satisfied: less than 1.5.

Survey

2012

Attributes of Crew Visits

- **38% of the crew respondents reported going ashore during the current cruise call at Tallinn.**
 - **The European average is 30%**
- **Another 34% who did not go ashore during the current call did so at least once in the previous month.**
- **The typical crew member spent an average of 3.0 hours ashore.**
 - **This is about the same as the European average of 3.1 hours**
 - **30% of those who went ashore spent 4 or more hours ashore.**
 - **65% spent between 2 or 3 hours ashore.**



Crew Onshore Expenditures

- **Crew visiting Tallinn reported spending an average of €22.61 while ashore.**
 - **This is about 2% below the European average.**
 - **Purchases of food and beverages accounted for 29% of total spending by crew.**
 - **Purchases of local crafts accounted for another 21% of their expenditures.**
 - **29% of the crew reported purchasing food and beverages while ashore while less than 2% reported making expenditures for jewelry, entertainment and museums .**
 - **The top four expenditure categories (food and beverages, local crafts, clothing and jewelry) accounted for 70% of crew onshore expenditures.**

Purchase Categories	Average Spend per Purchase	Share of All Ashore	Weighted Average Spend per Crew Visit	Europe Average
Food & Beverages at Restaurants & Bars	€ 22.98	28.5%	€ 6.55	€ 6.69
Taxis/Ground Transportation	€ 15.73	4.0%	€ 0.63	€ 1.51
Watches & Jewelry	€ 78.20	1.8%	€ 1.43	€ 1.66
Clothing	€ 53.71	6.4%	€ 3.44	€ 4.03
Internet & Telephone	€ 39.47	3.1%	€ 1.23	€ 1.28
Local Crafts & Souvenirs	€ 26.47	17.6%	€ 4.65	€ 2.20
Museums & Galleries	€ 12.13	1.5%	€ 0.18	€ 0.26
Entertainment	€ 22.40	0.9%	€ 0.20	€ 0.48
All Other Purchases	€ 57.53	5.9%	€ 3.37	€ 4.25
Tours	€ 28.22	3.3%	€ 0.93	€ 0.79
Total Expenditures per Crew Ashore			€ 22.61	€ 23.15

Survey

2012

- **22% of cruise passengers were very or extremely likely to return for a land-based or resort vacation within three years against 56% who were not too likely or not at all likely to do so.**
- **67% of crew members stated that they were very or extremely likely to recommend a land-based or resort vacation to a friend against 10% who were not too likely or not at all likely to do so.**

Survey
2012

**Cruise Activity
And
Economic Impacts**

Survey

2012 Tallinn Cruise Activity During 2012

- **There were 294 cruise calls in Tallinn during 2012 generating a throughput of 440,500 passengers (embarks + debarks + transit).**
- **The principal destinations for cruises that call at Tallinn are:**
 - **Scandinavian destinations including: Oslo , Stockholm and Copenhagen**
 - **Baltic destinations including: Klaipeda, Riga, St. Petersburg**
- **Tallinn is a primarily a destination port and all 440,500 passenger arrivals in this survey were on transit calls.**
- **An estimated 61,800 crew disembarked during cruise calls during 2012 and visited Tallinn.**

Estimated Passenger and Crew Spending - 2012

- **Surveys of transit and crew visiting Tallinn during the 2012 cruise season showed the following:**
 - **Transit passengers visiting Tallinn spent an average of €56.70 with tours and retail shopping accounting for 86% of their expenditures.**
 - **Crew visiting Tallinn spent an average of €22.61 with food and beverages, entertainment and retail goods accounting for 72% of their expenditures.**

Category	Average Expenditure per Passenger/Crew	
	Transit	Crew
F&B & Entertainment	€ 4.82	€ 6.75
Tours & Ground Transportation	€ 27.33	€ 1.56
Retail Goods	€ 21.48	€ 9.52
Other Purchases	€ 3.07	€ 4.78
Total	€ 56.70	€ 22.61

Estimated Passenger and Crew Spending - 2012

- **Passengers and crew spent an estimated €26.4 million during 2012**
 - Transit passengers accounted for 95% of the total with crew accounting for the remaining 5%.
- **Passengers and crew spent €12.1 million on tours and other ground transportation, accounting for just over 45% of their total expenditures.**
- **Passengers and crew spent another \$10 million on retail items, accounting for 38% of their total expenditures.**

Category	Total Expenditures		
	Transit	Crew	Total
F&B & Entertainment	€ 2,123,229	€ 417,295	€ 2,540,525
Tours & Ground Transportation	€ 12,038,974	€ 96,442	€ 12,135,416
Retail Goods	€ 9,462,026	€ 588,541	€ 10,050,567
Other Purchases	€ 1,352,347	€ 295,507	€ 1,647,854
Total	€ 24,976,578	€ 1,397,785	€ 26,374,363

Economic Impact Passenger and Crew Spending - 2012

- **The €26.4 million in passenger and crew spending generated an estimated 177 direct jobs and €4.3 million in compensation in Tallinn and the surrounding region.**
- **The transportation sector (primarily tour operators) had the highest direct employment impact with 63 jobs paying €1.25 million in compensation.**
- **The wholesale and retail sector had the second highest direct impact with 32 jobs paying €1.151 million in compensation.**
- **The hospitality sector (primarily restaurants and entertainment venues) benefitted from 23 jobs paying €0.61 million in compensation.**

Industry	Direct Expenditures € Millions	Direct Employment	Direct Compensation € Millions
Wholesale & Retail Trade	€ 4.48	32	€ 1.15
Transportation & Utilities	€ 12.17	63	€ 1.25
Hospitality	€ 2.54	23	€ 0.61
All Others	€ 7.18	58	€ 1.30
Total	€ 26.37	177	€ 4.31

Economic Impact Passenger and Crew Spending - 2012

- **The €26.4 million in passenger and crew spending generated an estimated €50.6 million in total (direct + indirect) output throughout Estonia.**
- **This output resulted in the employment of 365 residents of Estonia paying €9.07 million in compensation.**
- **Because the direct impacts account for about 45% of the total impacts, the total impacts remain concentrated in the trade and transportation sectors.**
- **However, the indirect impacts do spread into other sectors, including manufacturing, business and financial services to name a few.**

Industry	Total Output € Millions	Total Employment	Total Compensation € Millions
Manufacturing	€ 9.10	37	€ 1.64
Wholesale & Retail Trade	€ 6.60	106	€ 1.77
Transportation & Utilities	€ 21.40	89	€ 2.88
Hospitality	€ 2.60	29	€ 0.63
Financial & Business Services	€ 6.60	69	€ 1.39
All Others	€ 4.30	35	€ 0.76
Total	€ 50.60	365	€ 9.07

Economic Impact Passenger and Crew Spending - 2012

- **Other major highlights of the total economic impacts include:**
 - Every €1 million in passenger and crew spending generated 14 jobs in Estonia.
 - On average each of these jobs paid €24,800 in employee compensation.
 - The trade, transportation and hospitality sectors accounted for about 67% of the direct impacts.
 - The manufacturing, financial, business and personal services sectors accounted for nearly 55% of the indirect impacts.
 - Every 10 direct jobs generated by passenger and crew spending resulted in about another 11 jobs elsewhere in the economy of Estonia.

