

# Tallinn visitor survey 2014 RUSSIA

TNS Emor  
March 2015



**TNS Emor**  
Tallinn visitor survey 2014  
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# 1

## Introduction and background of foreign visitors to Tallinn



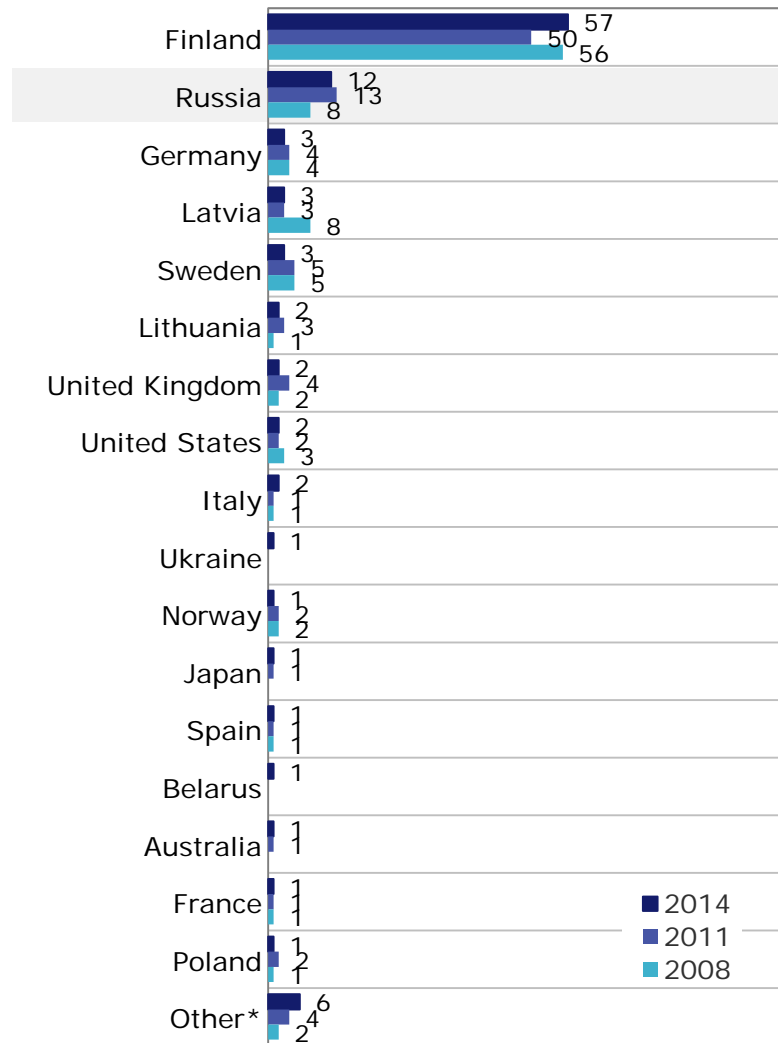


- The survey of foreign visitors to Tallinn has been commissioned by the Tallinn City Enterprise Board and carried out using the same methodology since 2002. Data is collected throughout the survey year among foreign visitors leaving the country via mainland border crossings, Port of Tallinn, Tallinn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

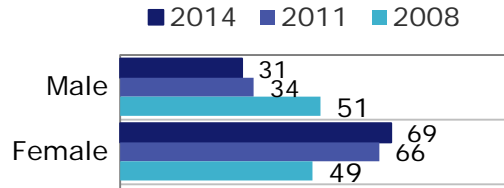


# Profile of visitors arriving to Tallinn from Russia

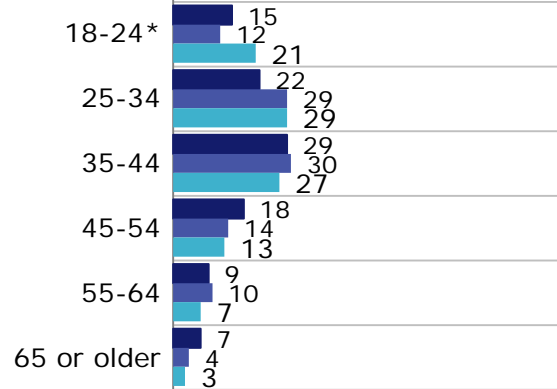


% of visitors to Tallinn from Russia, n=225

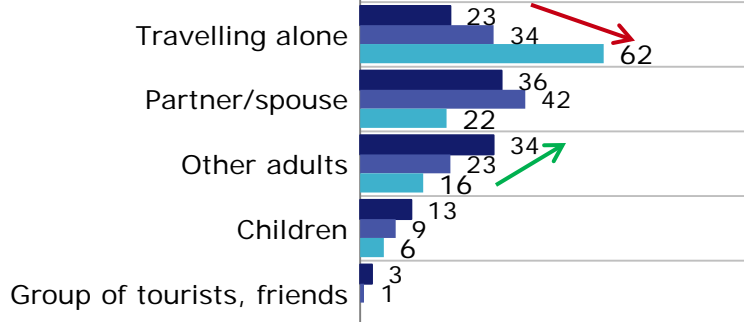
## GENDER



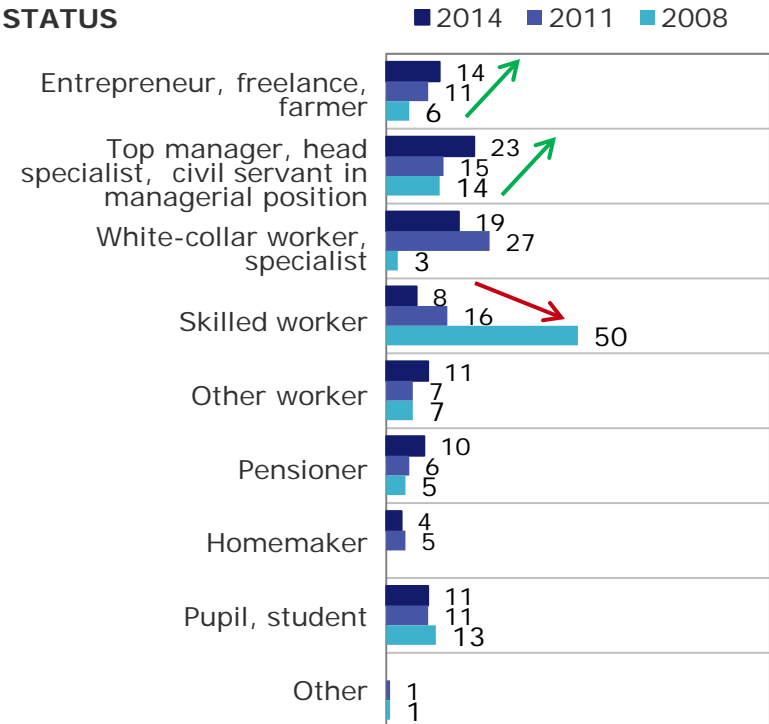
## AGE



## 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)

## In addition to Tallinn, Russian visitors also visit more other destinations; but trip length is decreasing



- In 2014, approximately 358 000 visitors came from Russia, making up approximately 11% of all foreign visitors to Tallinn (not including cruise passengers). While during earlier survey periods the share of Russian tourists had been steadily increasing, now their share has decreased (4%→7% → 13% →11%) and the share of so-called “other countries” has increased.
- Compared to other countries, Russian tourists include relatively more over 35-44-year-olds, the share of 45-54-year-olds has increased as well. The share of women has been increasing since 2003 and has now reached 69% (average of all countries is 51%).
- While earlier we could say that compared to other countries, there were relatively more of those from Russia who travelled alone then now only every fourth tourist travels alone, the number remaining slightly below average. The share of skilled workers among visitors has decreased significantly (50%→16% → 8%).
- Tallinn is the only destination for only every third tourist (average of all countries is 51%), other places in Estonia are visited increasingly more often.
- Tallinn is visited the most on vacation and the share of those on vacation is similar to average. At the same time, visitors from Russia come to Tallinn on business trips less frequently than on average but more of them visit friends-acquaintances and come to shop. Unlike tourists from other countries, they consider their trip to Tallinn to be a short break somewhat more frequently (two visitors out of three).
- The share of those staying overnight has continued to decrease during the last three survey periods. The average number of nights spent in Tallinn has decreased but still remains above the average level (average - 2,3; Russian target group 3,5→2,9). The share of nights spent elsewhere has decreased, which is why we can presume that the average trip length is on the decrease.
- The majority (66%→72%) spend their nights at accommodation establishments and their share is increasing. There are more of those spending the night with friends and relatives than on the average but their share continues to decrease. Next to hotels, other accommodation establishments are becoming increasingly more important.
- In booking accommodation, there is a clear trend towards booking online (18%→37%→54%). Only 7% have used the help of a travel agency/travel agent, which is significantly below the average (26%). Compared to other countries, they also use the help of local acquaintances more.
- Compared to average, there are more of those among Russian visitors who make the decision to travel quickly, less than a week before the trip. At the same time, we can say that there is a rather equal number of travelers with various schedules. Discounts influence the decision the most. Three out of ten visitors say that they have not noticed any promotional campaigns about Tallinn. Every tenth visitor comes to Tallinn to participate in cultural and sporting events.



## Summary (2)

# Visitors from Russia spend less than they used to



- The decision to visit Tallinn is primarily based on prior experience and acquaintances' recommendations. Every sixth visitor looks for information on travel portals and travel forums before the trip. The role of other channels of information is less important. Compared to the average, Russian tourists look for information about Tallinn before the trip significantly less.
- When it comes to information during the trip, they primarily trust local friends-acquaintances (50%). Acquaintances' recommendations are important also for visitors from other countries (36%) but those numbers remain significantly below that of Russian tourists.
- Compared to visitors from other countries, personal car is used significantly more to get around Tallinn (since there are also more people who arrive by car), this is followed by taxis for getting around town. The number of those taking a walk in the city has decreased even more compared to previous periods (61%) and it falls significantly below average (79%). Even though Old Town and downtown are visited the most, visiting areas further from the centre has increased as well (immediate surroundings, Nõmme, Kalamaja).
- Even though the main activities in Tallinn are, similarly to previous surveys, walking around town, sightseeing, shopping, and going to cafes/restaurants, we can say that tourists are less active in general and the variety of different activities has decreased (partially due to the fact that trips are shorter and also destinations outside Tallinn are visited). Only dealing with work matters has increased slightly.
- Similarly to previous periods, visitors' overall impression of Tallinn is very good (average evaluation - 9,2) and somewhat above average (8,8). All qualities characterizing the city receive a score of 3,4 or above on a 4-point scale, the evaluations have improved slightly compared to 2011. We can see a positive trend when it comes to perceived price and quality ratio of products/services – it is increasingly favorable.
- Compared to the average of all countries, child friendliness and value for money of products/services receive higher evaluations. Evaluations are slightly below average when it comes to ease of getting around town (not enough clear signs) and selection of restaurants. In other terms, Russian tourists' evaluations are average or slightly above average.
- The amount of money spent in Tallinn per person a day has dropped significantly after the increase in 2011 and even remains below the 2008 level. Regardless of that, the total spending per person is the highest of all in case of Russian tourists. The biggest change took place in case of money spent on shopping – when in 2011 the average amount per person spent on shopping was 290€, in 2014 it was only 85€. At the same time it is still above the average (51€).
- In general, Russian tourists are very satisfied with their trip to Tallinn and for every fourth visitor the trip exceeded their expectations. Approximately half of the visitors definitely want to return to Tallinn and three out of four would very likely recommend Tallinn as a travel destination to their friends-acquaintances.

# 3

## Purpose of the visit and route



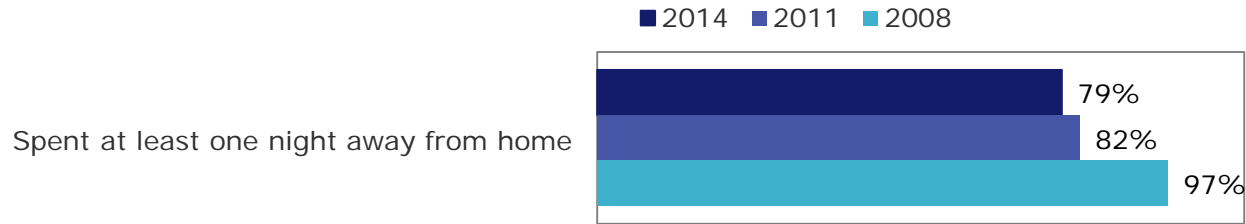


# Tallinn as the destination

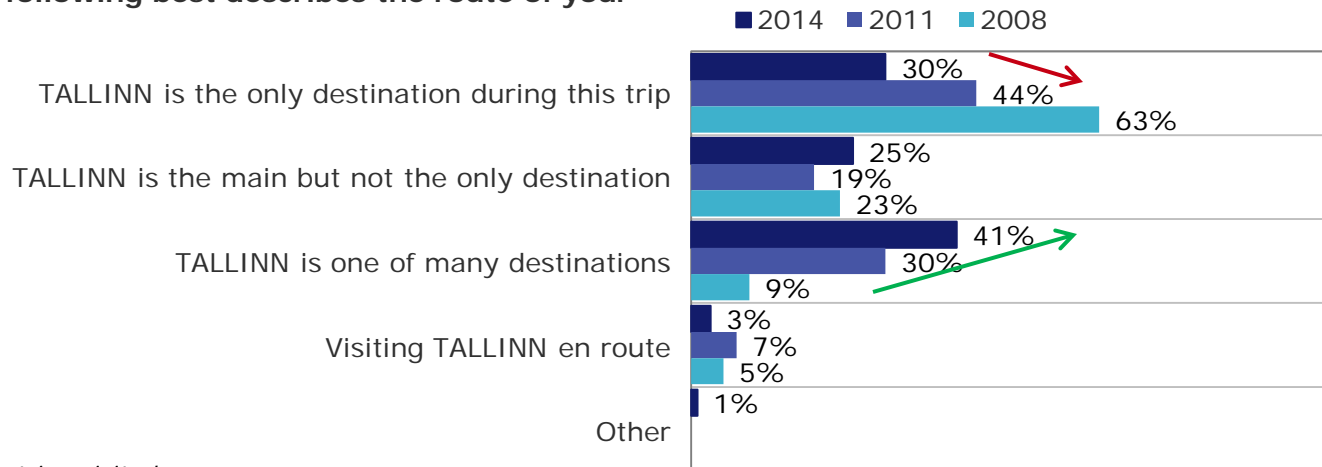
## More destinations are visited in addition to Tallinn

% of all visitors who have spent at least one night away from home, n=180

Are you spending at least one night away from home?  
n=225



Which of the following best describes the route of your trip? n=180



Other countries visited were:  
Finland, Sweden, Latvia and Lithuania

# Purpose of the trip

## Approximately half of the visitors come to Tallinn on holiday

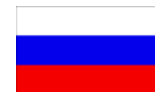
% of all visitors, n=225 (one answer)



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



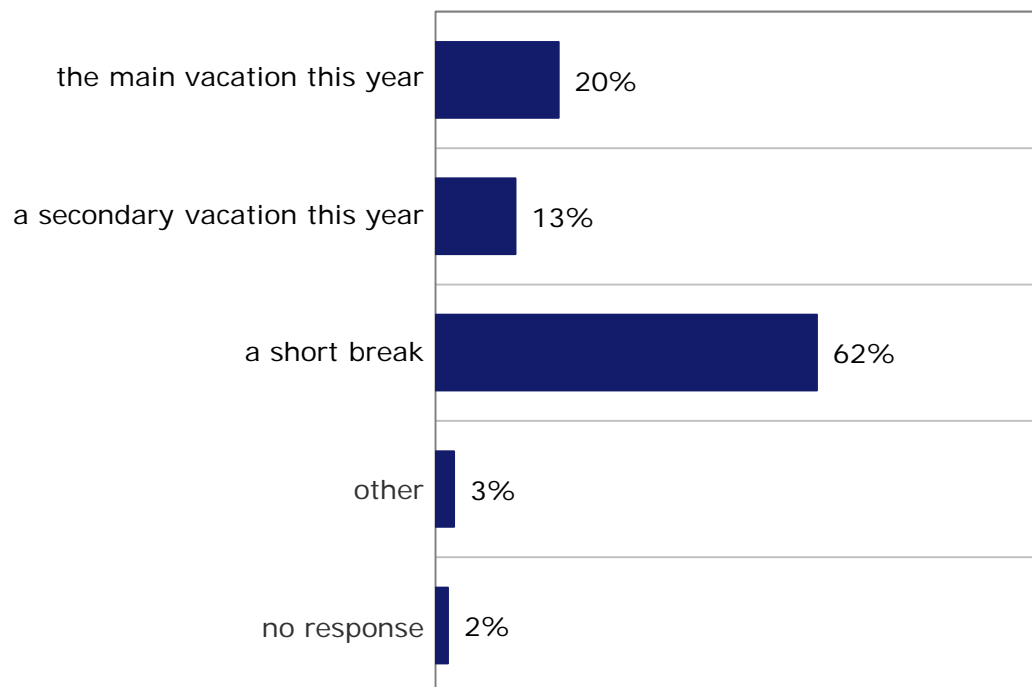
# Meaning of the holiday trip



## 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=125

Would you describe your holiday as ...

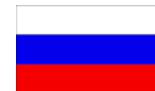


# 4

## Spending the night in Tallinn and accommodations



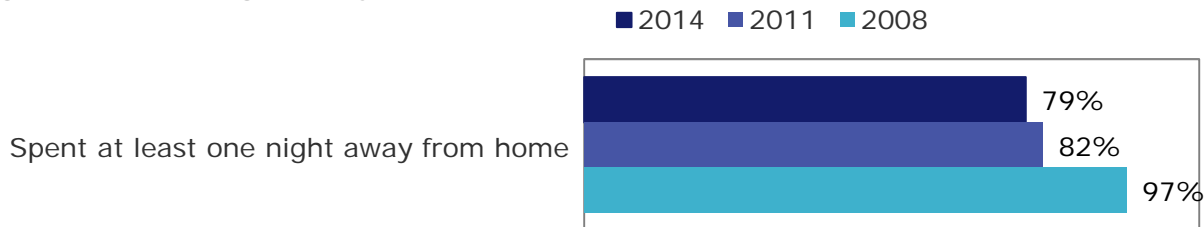
# Spending the night away from home (1)



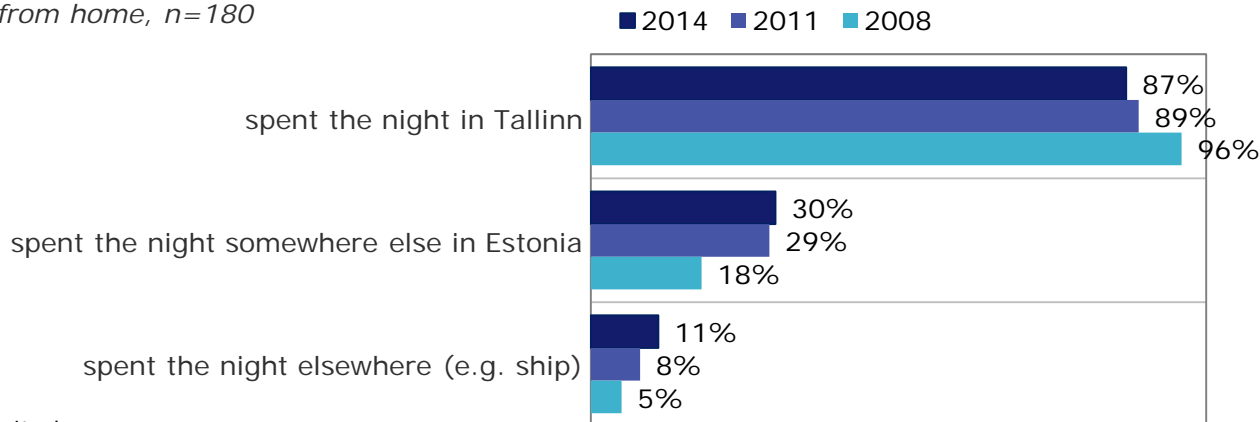
## Nine out of ten visitors spend a night in Tallinn

% of all visitors to Tallinn who have spent at least one night away from home, n=180

Are you spending at least one night away from home?  
n=225



% of all visitors who have spent at least one night away from home, n=180



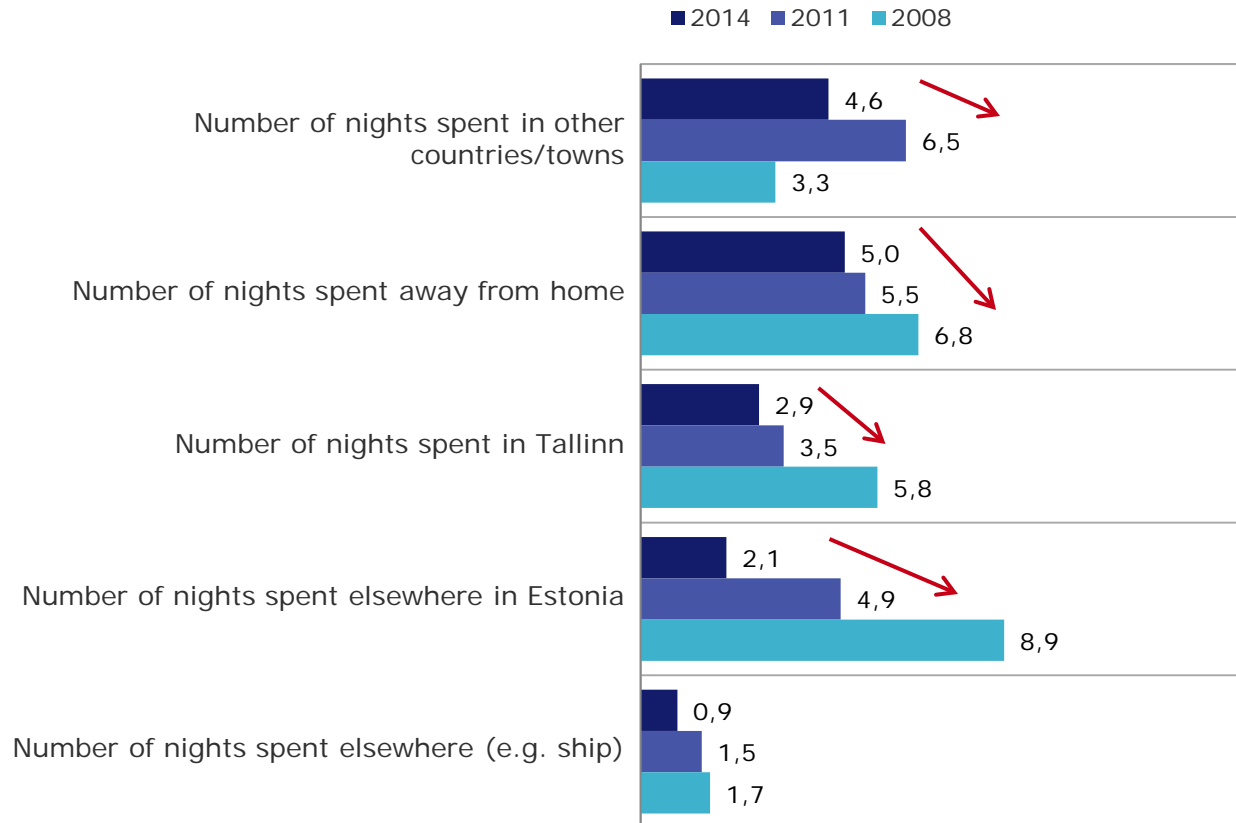
Other countries visited:  
Finland, Sweden, Latvia and Lithuania

# 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





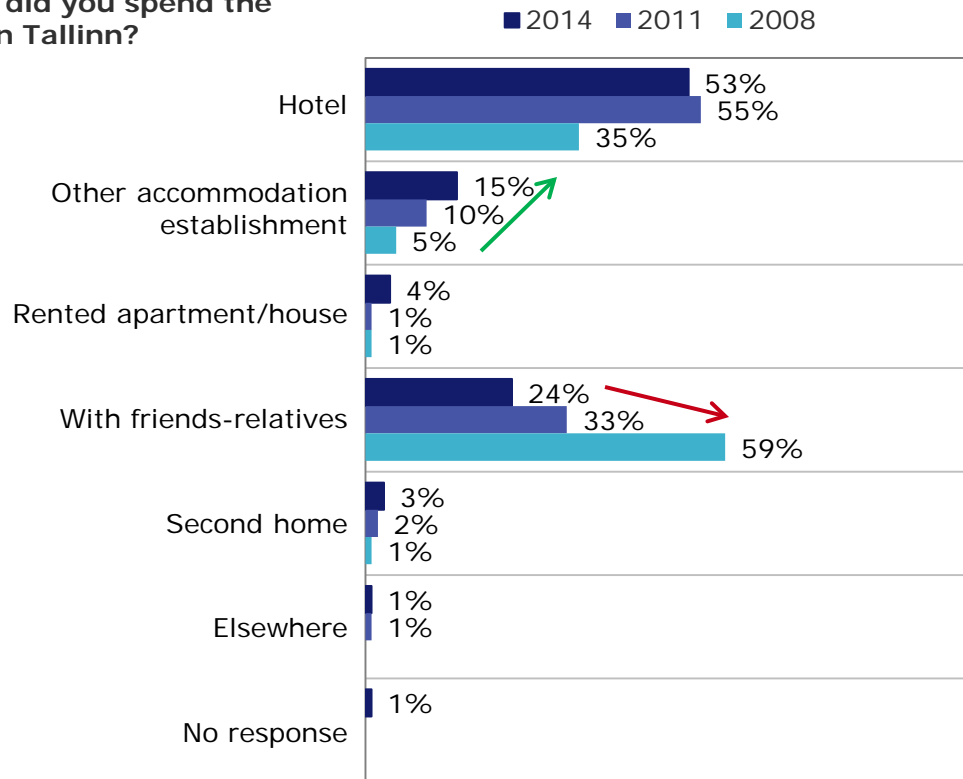


# Spending the night in Tallinn

## The share of those spending the night at accommodation establishments is increasing

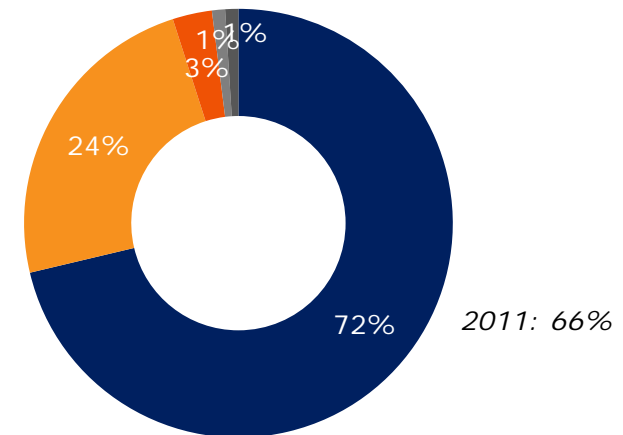
% of visitors to Tallinn who spent at least one night in Tallinn, n=155

Where did you spend the night in Tallinn?



Where did you spend the night in Tallinn?

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



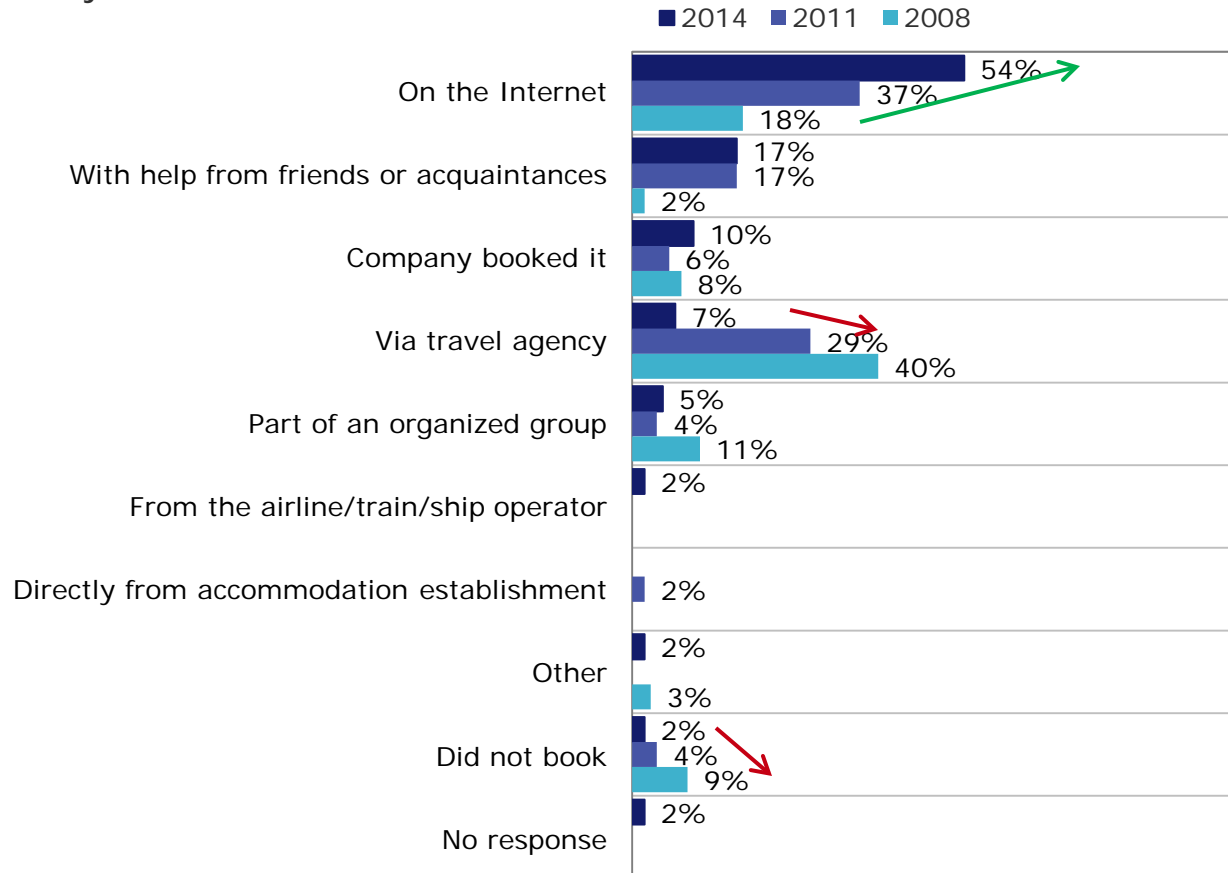
# Booking accommodation



## 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=113

How did you book your ACCOMMODATION in Tallinn?



# 5

## Planning the trip to Tallinn



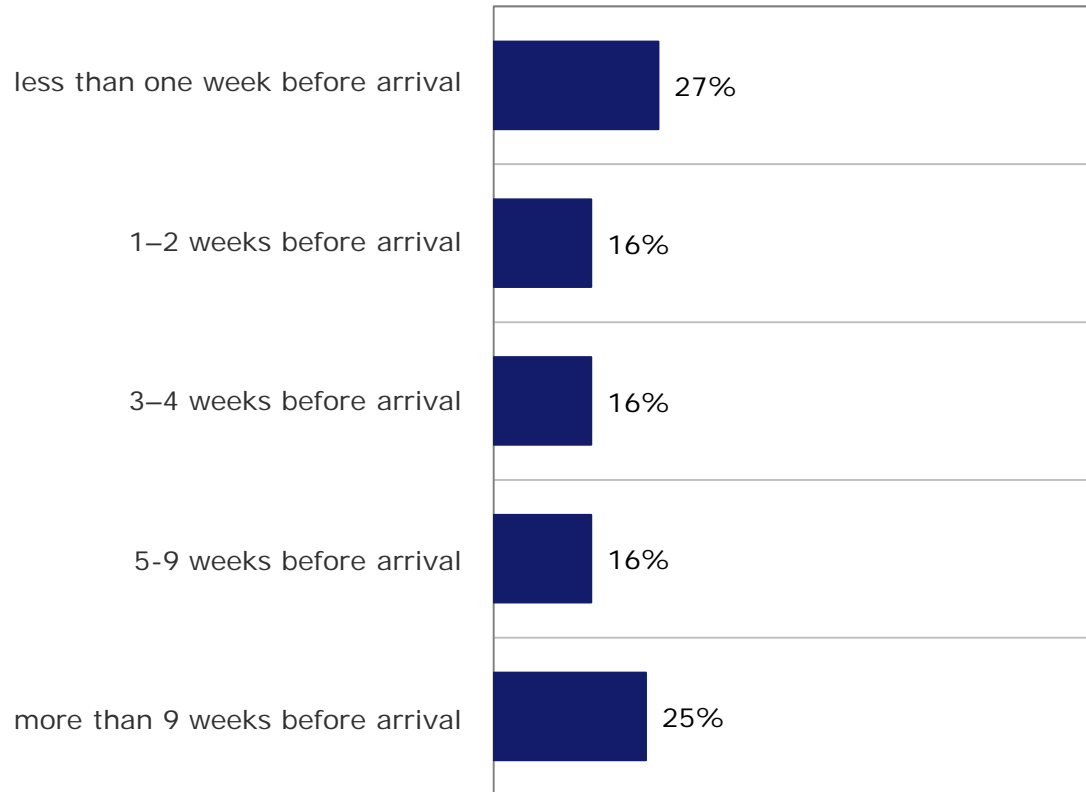


# The decision to travel to Tallinn

## There is a relatively equal number of people with different schedules

% of visitors to Tallinn, n=225

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

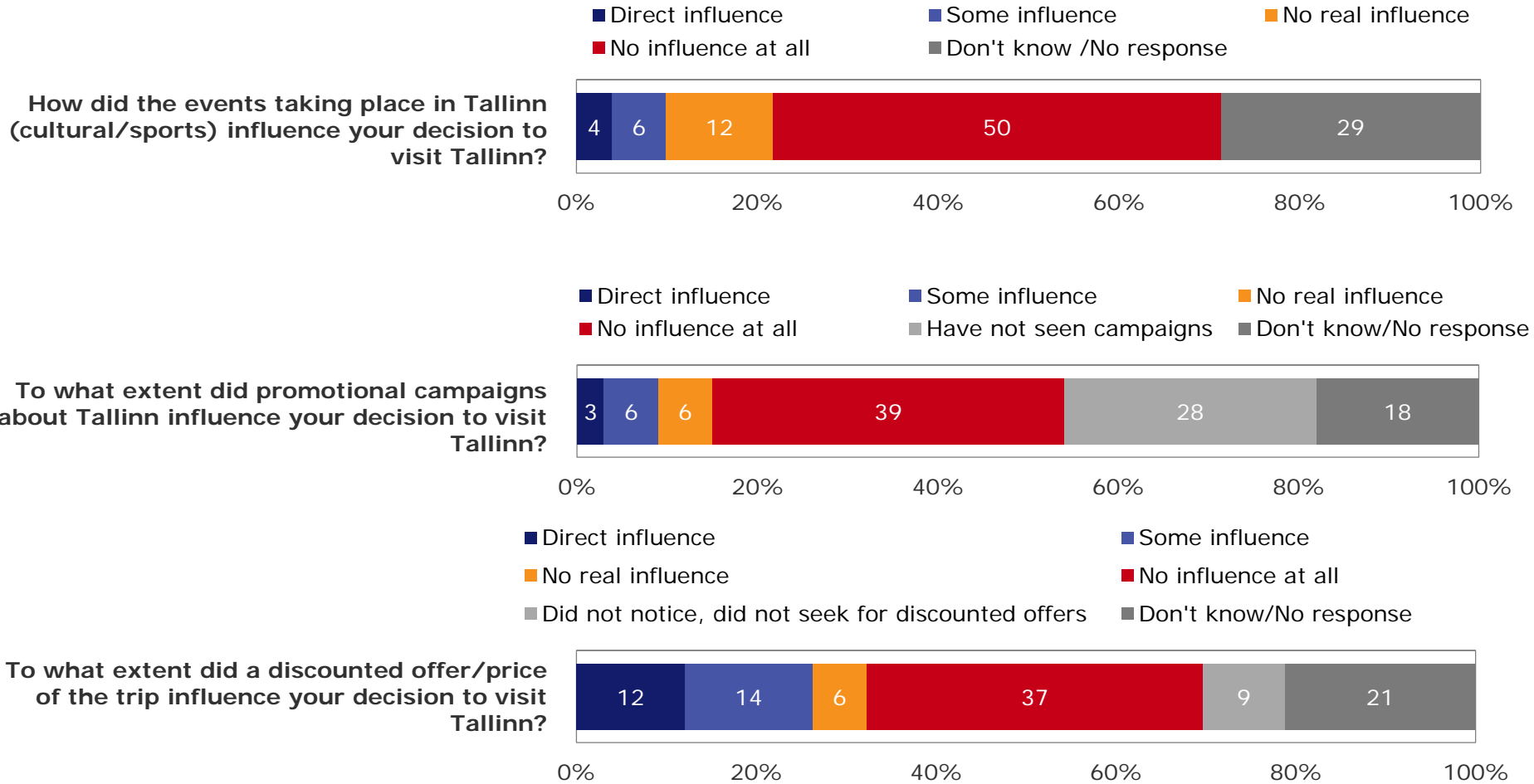


# Factors influencing the decision to travel to Tallinn



## Discounted travel offers influence the decision the most

% of visitors to Tallinn not on a business trip, n=206



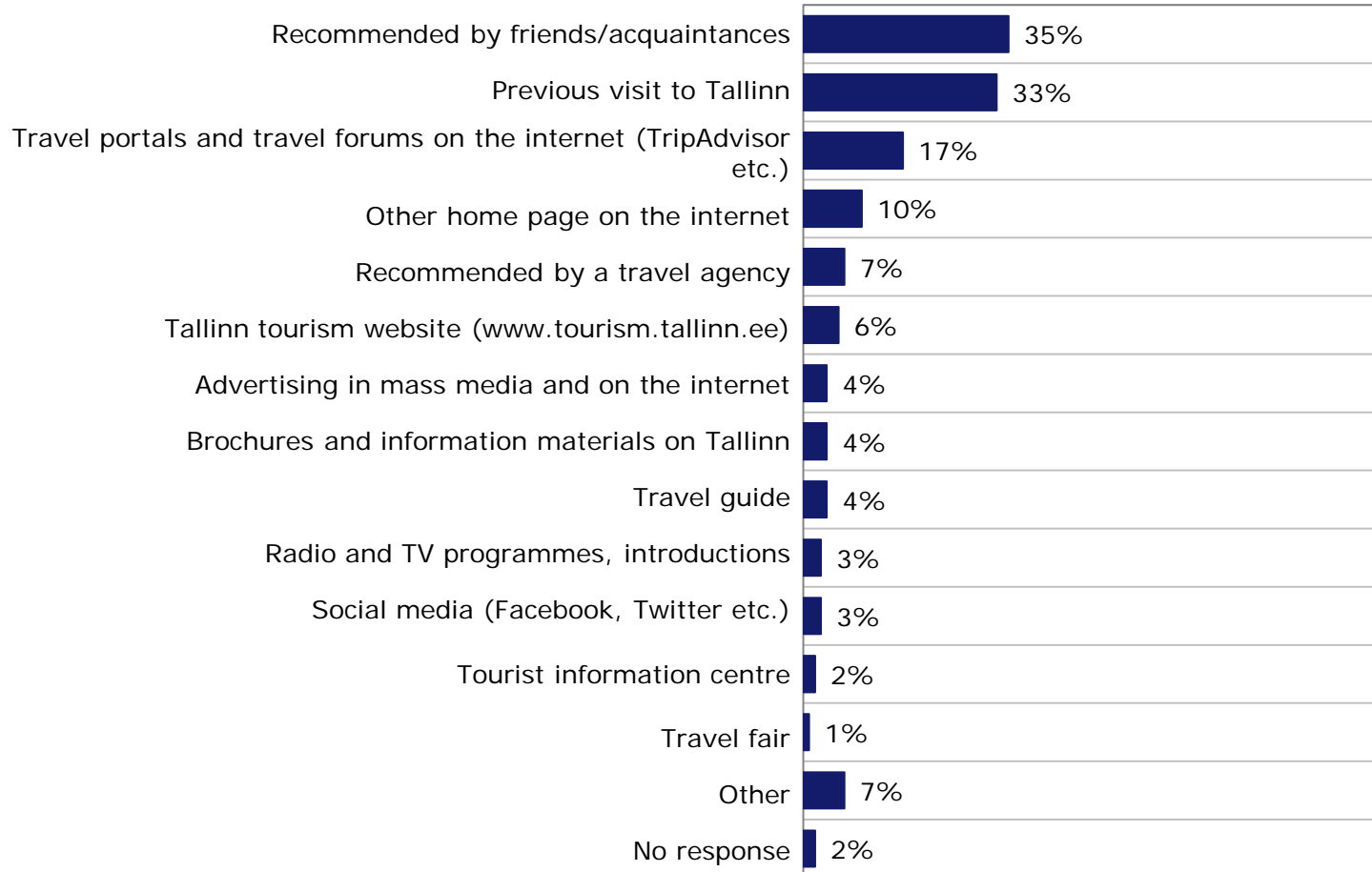


# Sources of information about Tallinn before the trip

## Decision to travel is based on personal experience and acquaintances' recommendations

% visitors to Tallinn, n=225

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



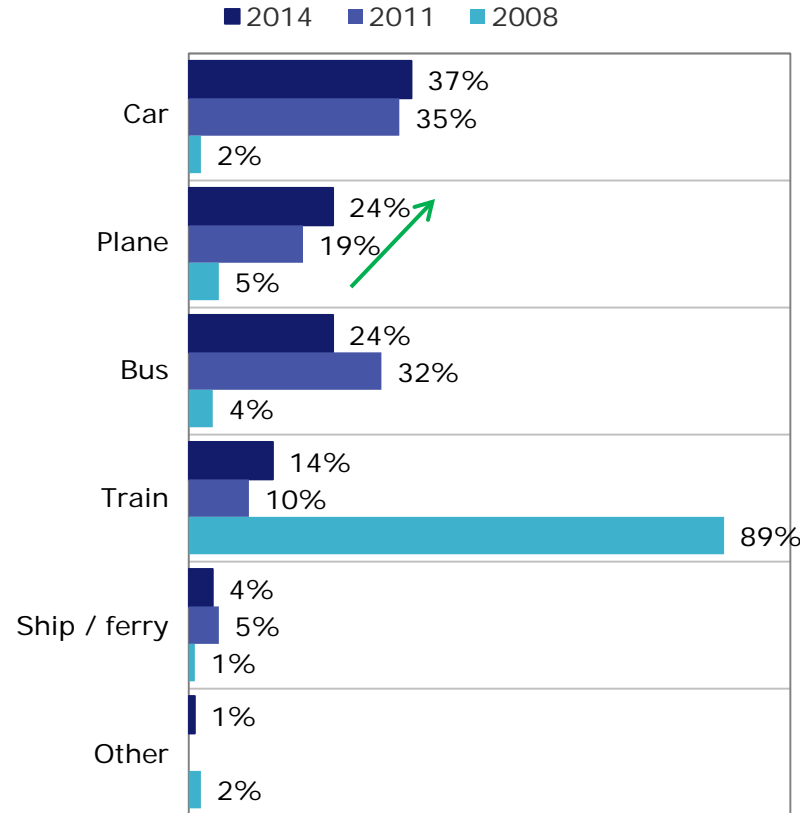


# Transport used to arrive in Tallinn

Even though transport by land is dominant, the relative importance of air transport is increasing

% of visitors to Tallinn, n=225

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



# 6

## Visit to Tallinn





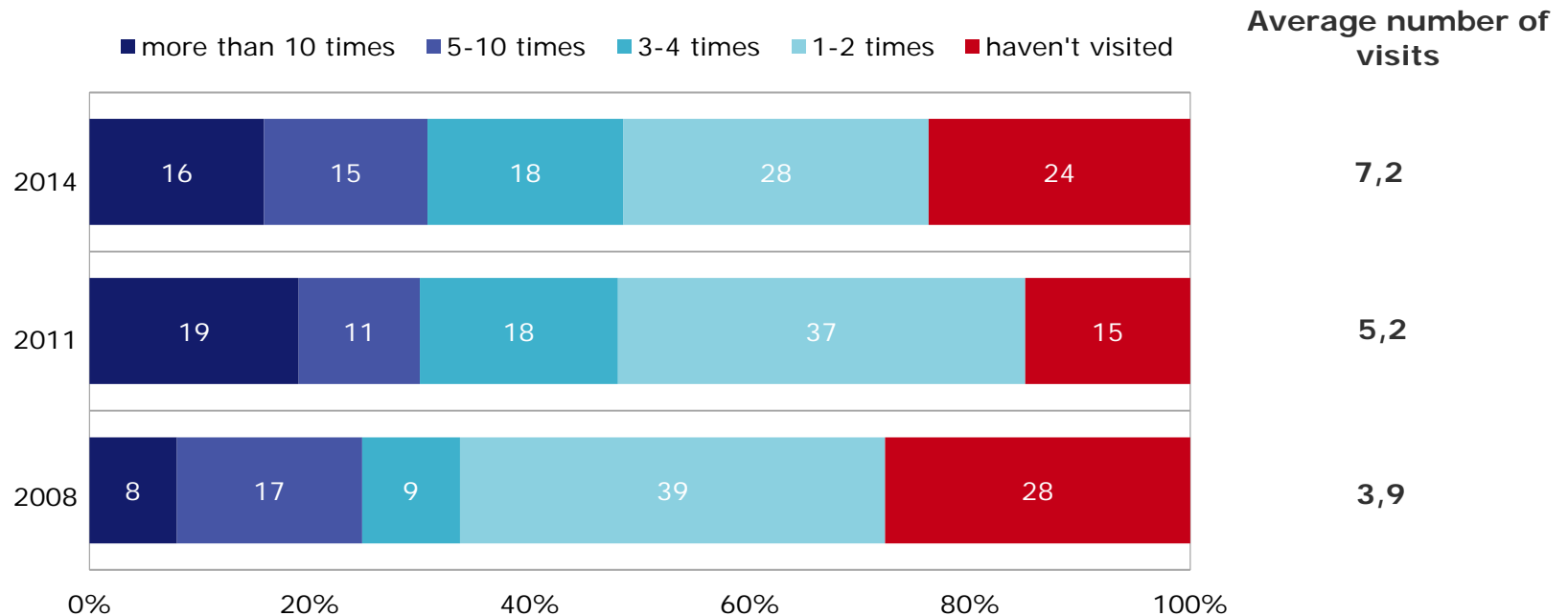
# Previous visit to Tallinn



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

% of those visitors to Tallinn who were able to answer the question, n=221

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



The reasons for choosing Tallinn as a travel destination, mentioned by those who were in Tallinn for the first time:

- New destination, wanted to visit Tallinn, Estonia, the Baltic States
- Somebody recommended, a friend, spouse
- Interesting city, I'm interested in the city or the country

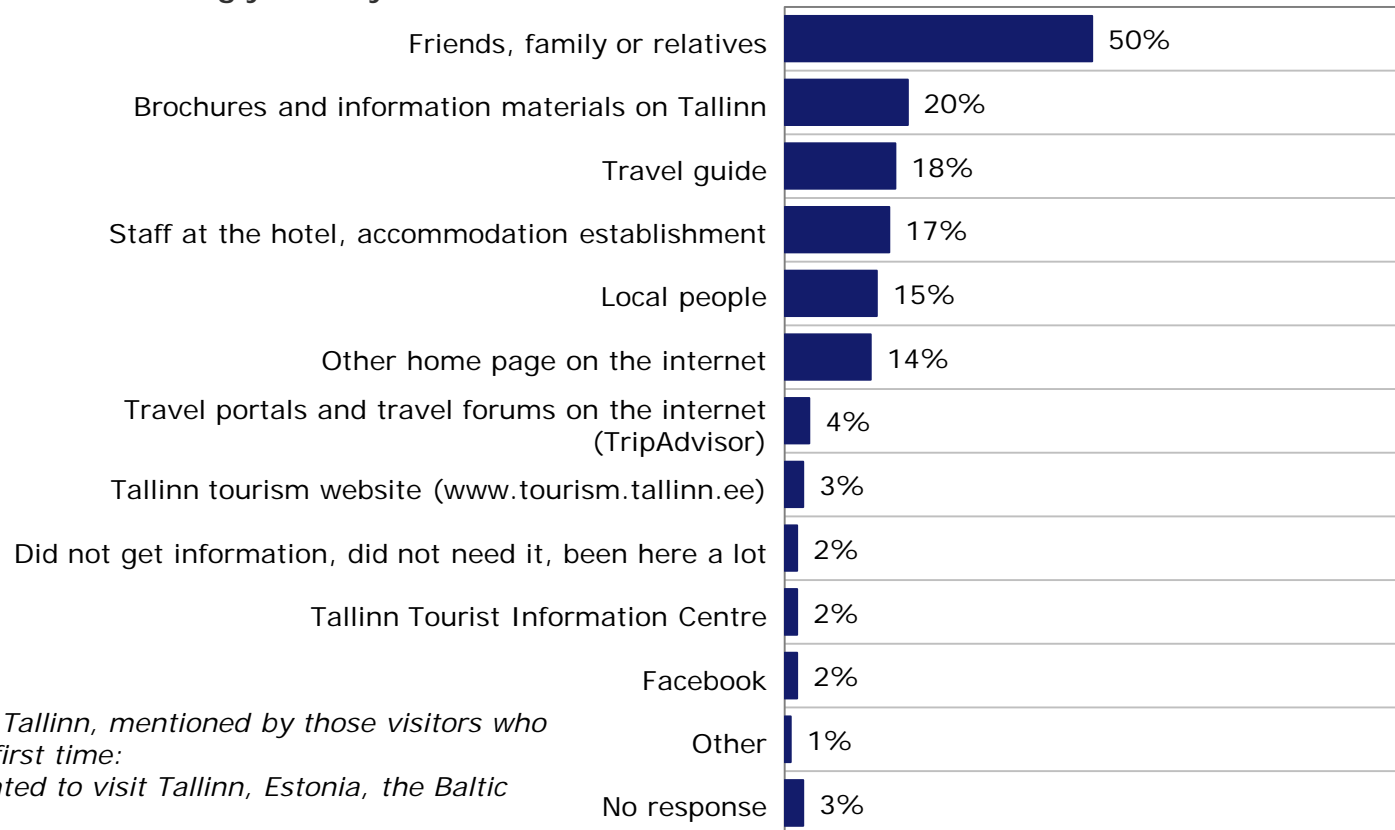


# Sources of information about Tallinn during the trip

## Friends and acquaintances are important, internet is less important

% of visitors to Tallinn, n=225

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



*The reasons for visiting Tallinn, mentioned by those visitors who came to Tallinn for the first time:*

- *New destination, wanted to visit Tallinn, Estonia, the Baltic States*
- *Somebody recommended, a friend, spouse*
- *Interesting city, I'm interested in the city or the country*

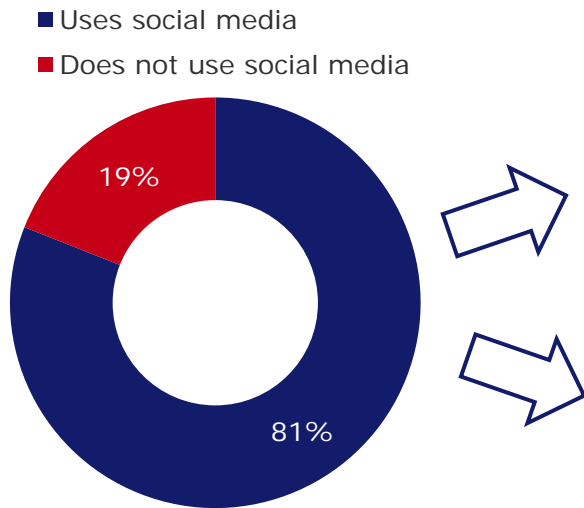


# Sharing travel experiences on social media

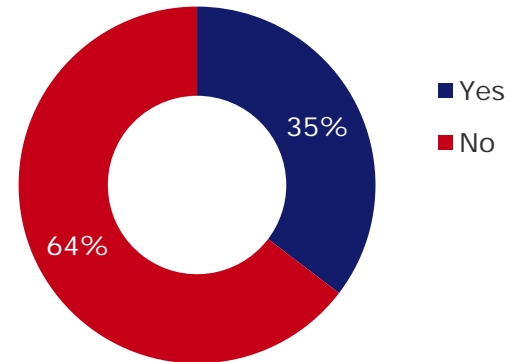
## Sharing experiences mostly takes place after the trip

% of those using social media

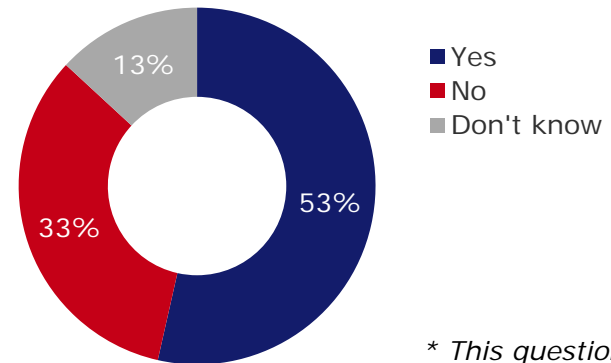
Use of social media (Facebook, Twitter, blogs) n=225



Did you share travel experiences on social media during your stay in Tallinn (Facebook, Twitter, blog)? n=181



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.

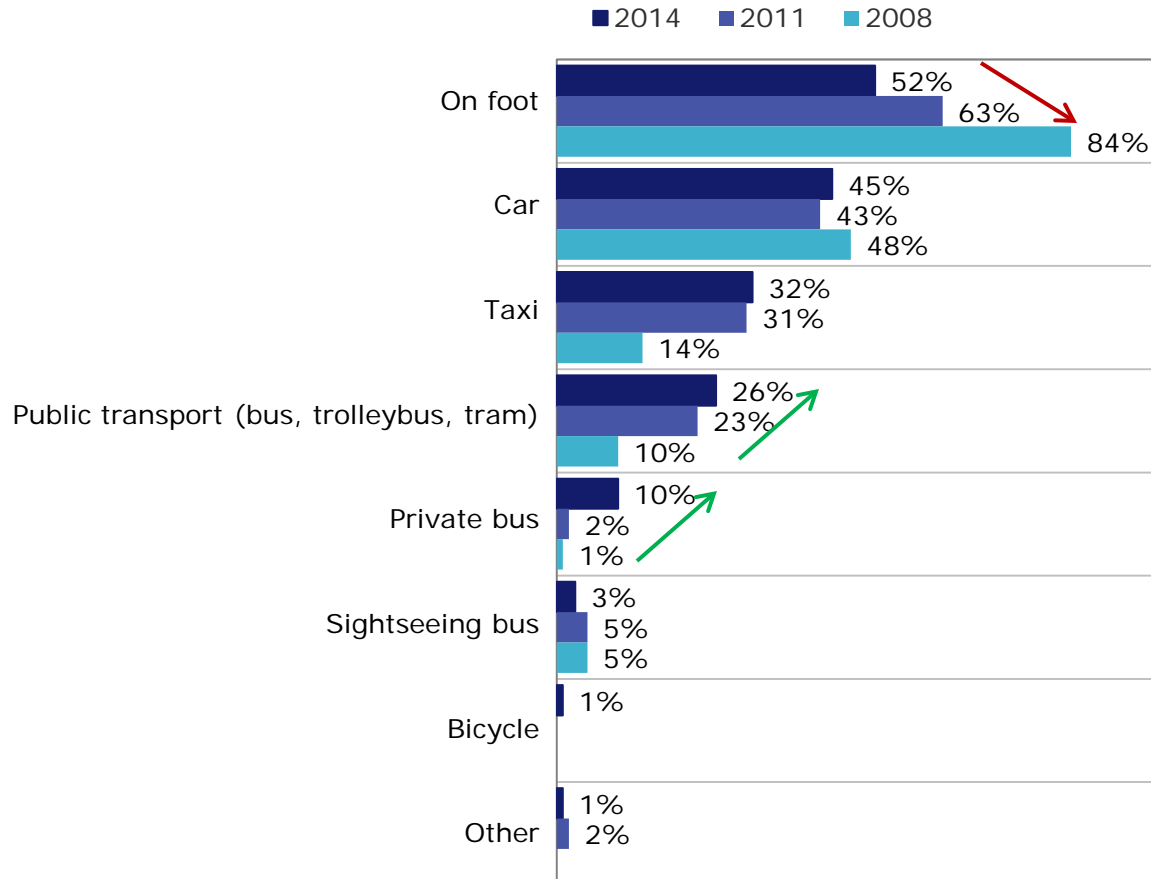


# Transport used in Tallinn

## Role of public transport is on the increase

% of visitors to Tallinn, n=225

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



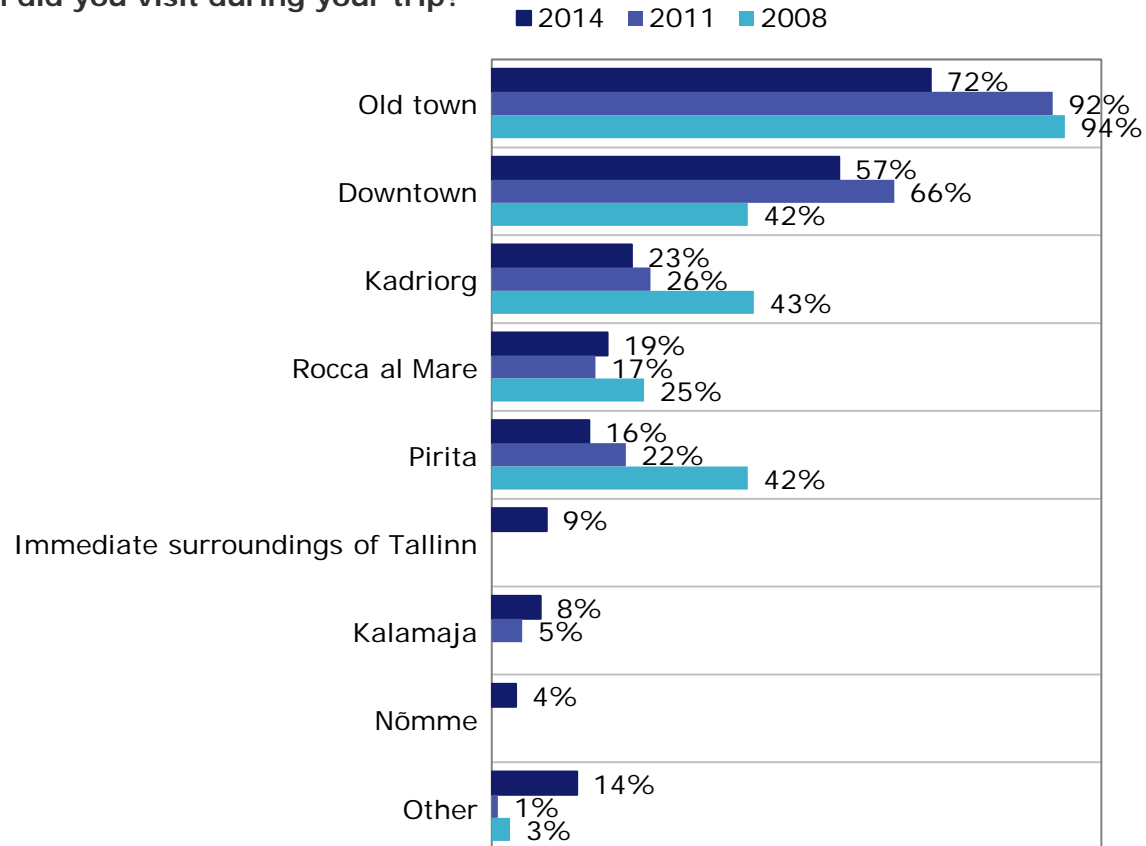
# Areas visited in Tallinn

## Visits to areas further from the city centre have increased

% of visitors to Tallinn, n=225



Which areas of Tallinn did you visit during your trip?



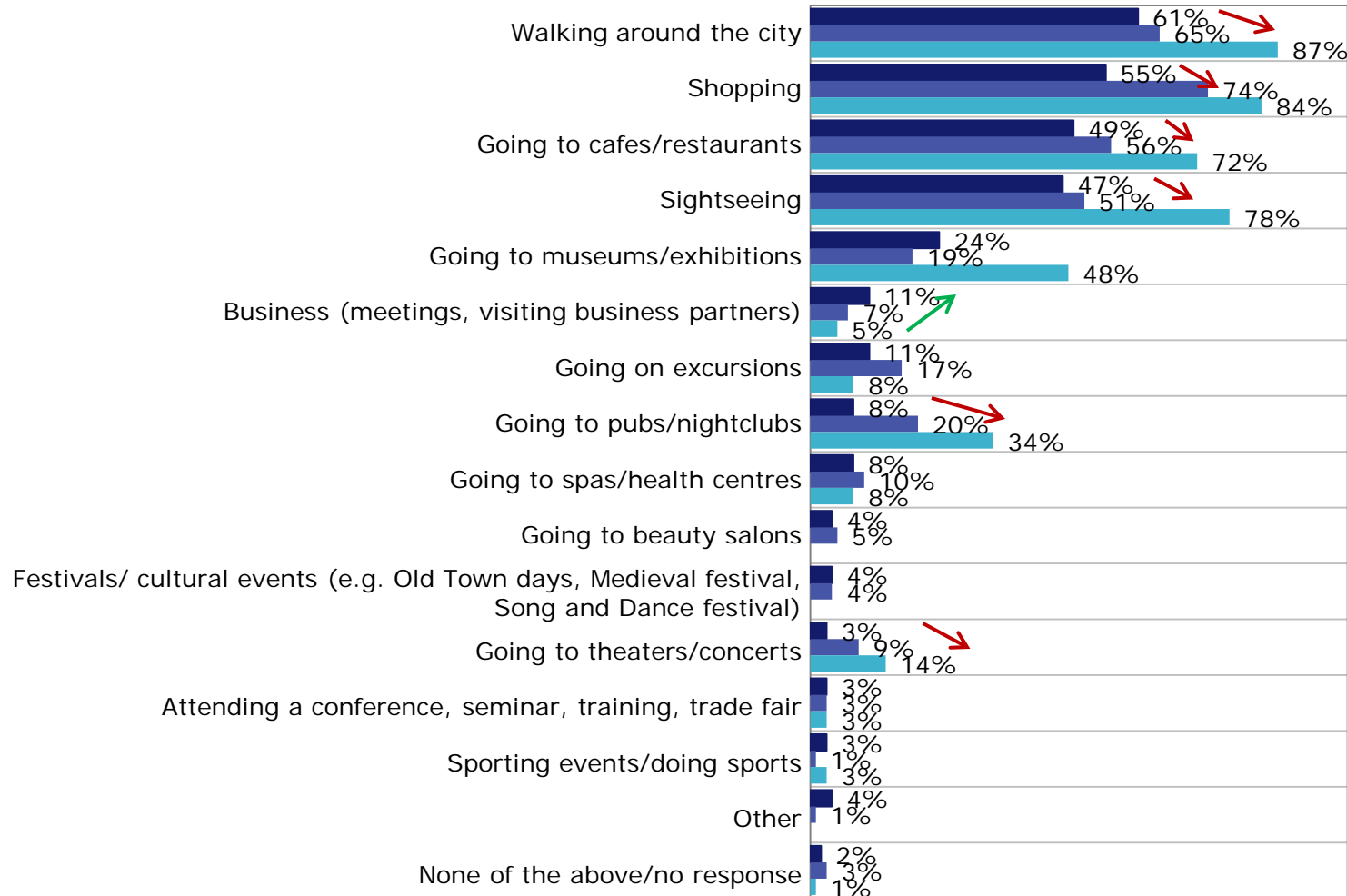
# Activities in Tallinn: activeness has decreased



% of all visitors to Tallinn, n=225

Which of the following activities did you do in Tallinn?

■ 2014 ■ 2011 ■ 2008



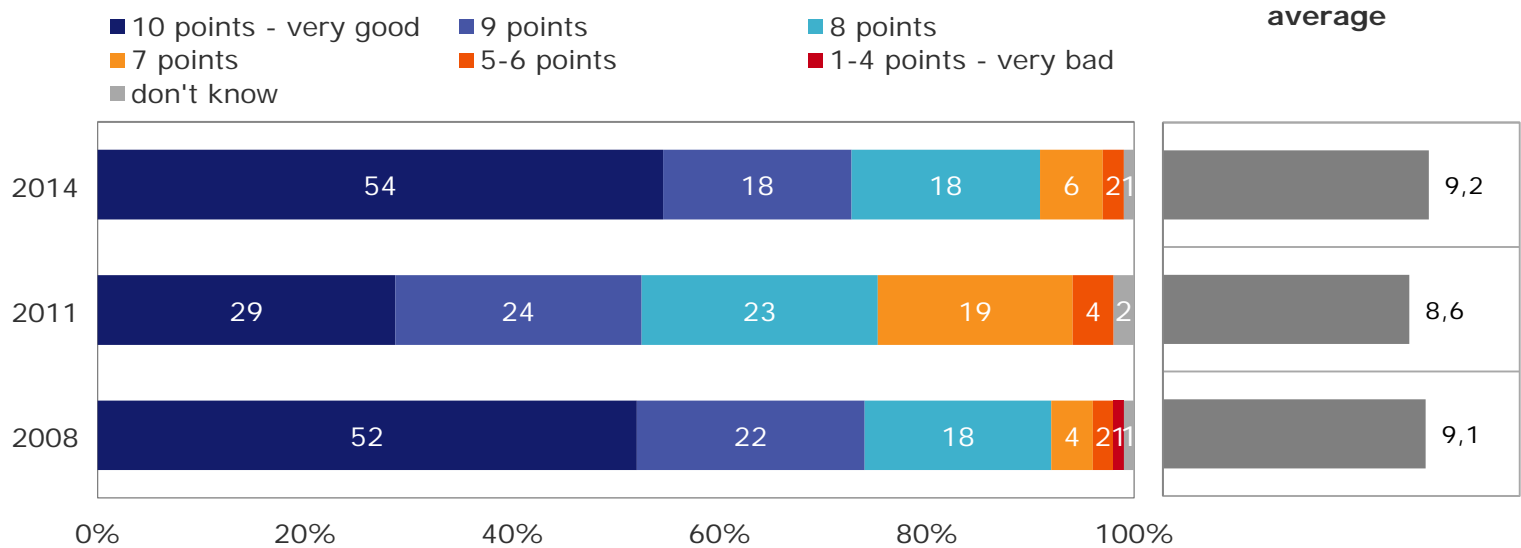
# Overall impression of the trip to Tallinn

## Overall impression of the city is very good



% of visitors to Tallinn, n=225

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?

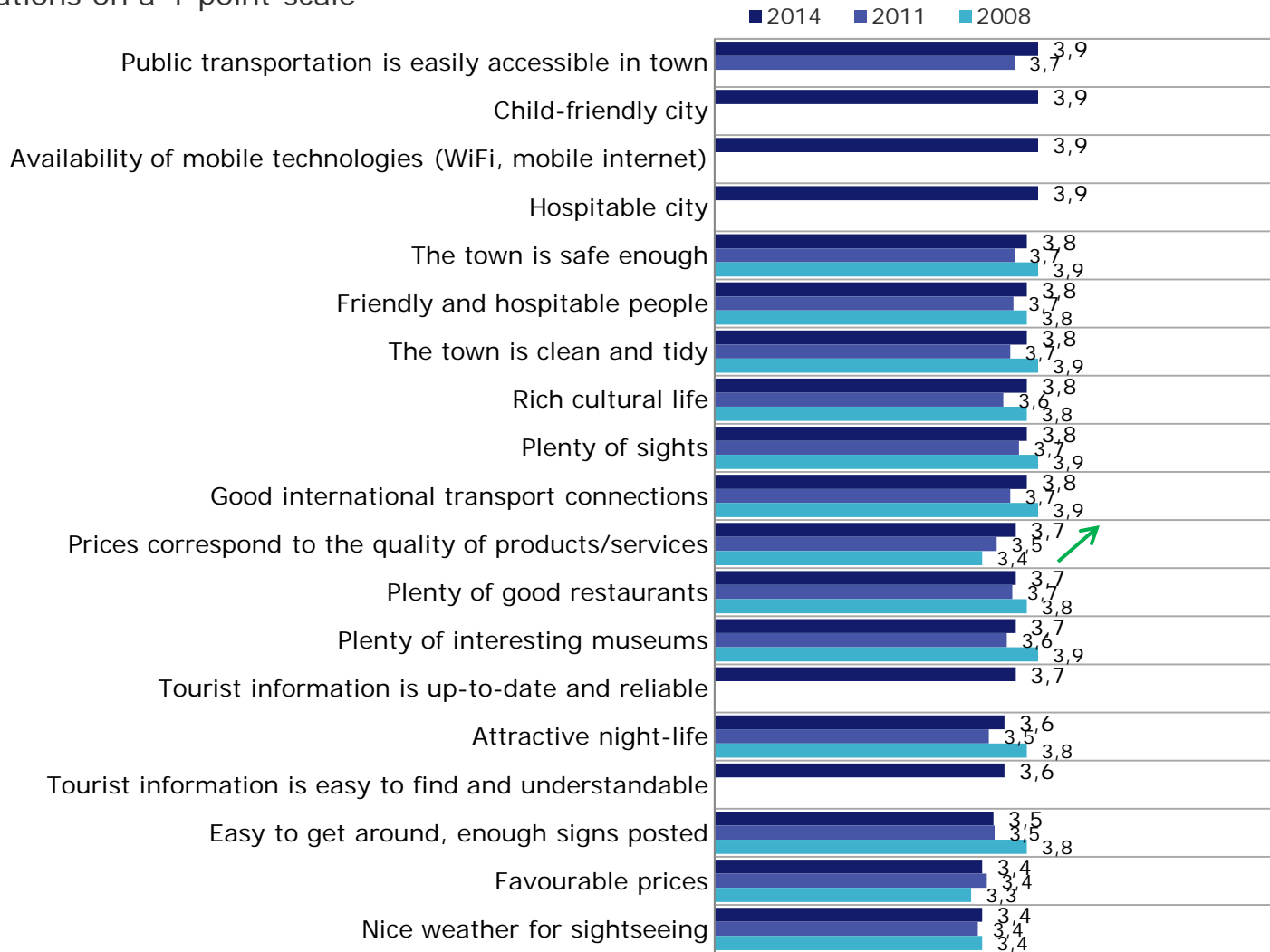


# Image of Tallinn



## Price-quality ratio of products is seen as increasingly more favourable

average evaluations on a 4-point-scale

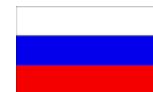




# Customer service in Tallinn

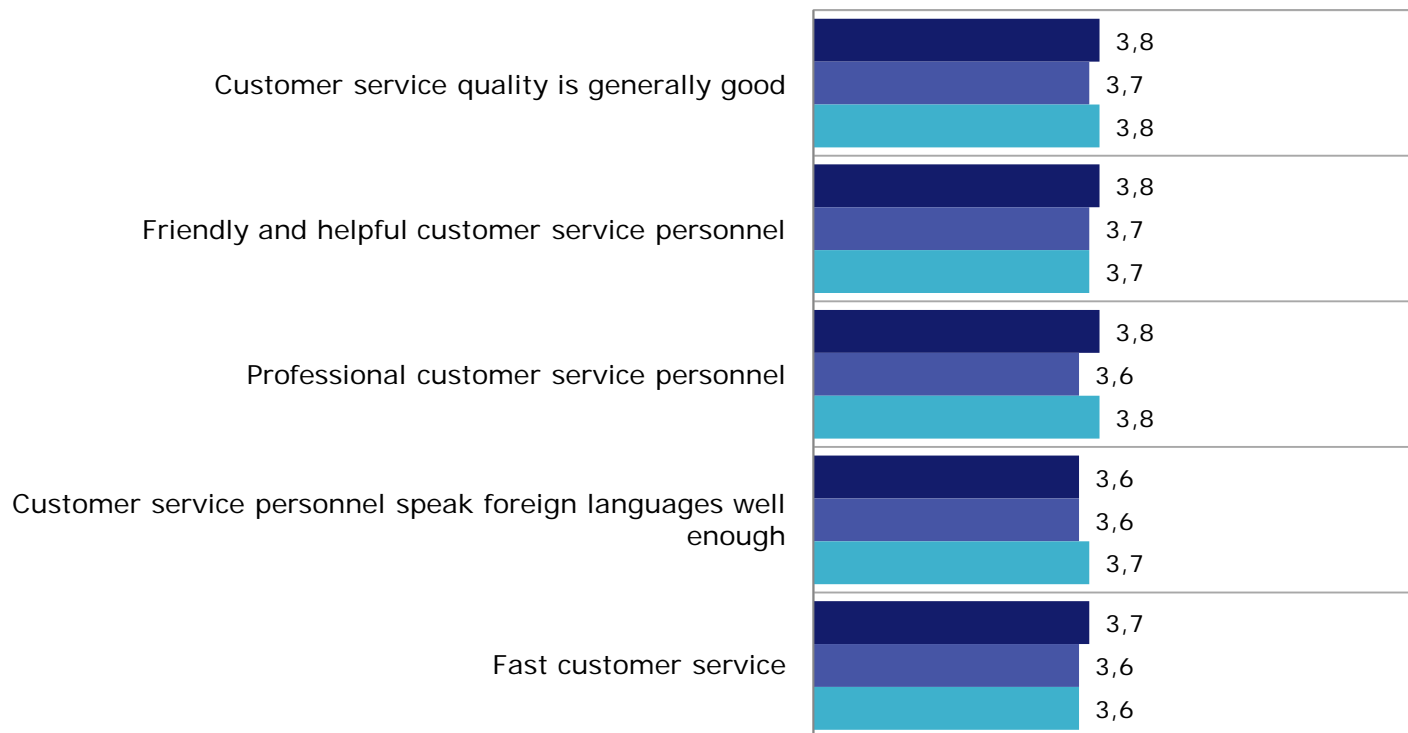
## Customer service rating has improved slightly

average evaluations on a 4-point-scale



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

■ 2014 ■ 2011 ■ 2008



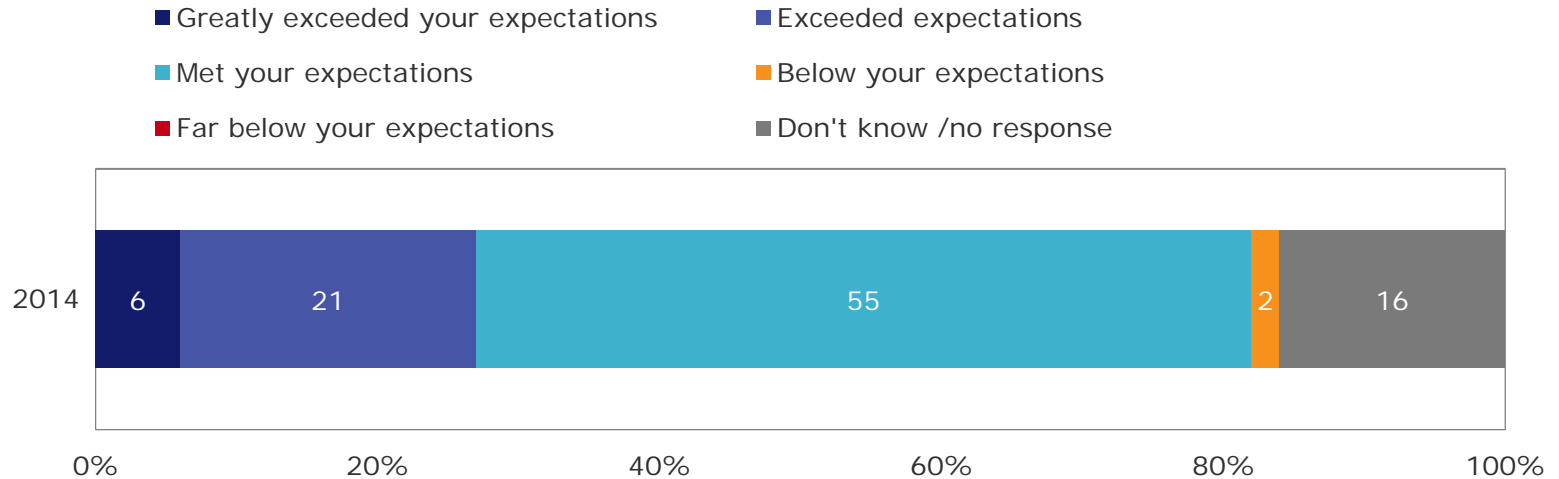
# Trip to Tallinn meeting expectations

## The trip exceeded expectations for every fourth visitor

% of visitors to Tallinn, n=225



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



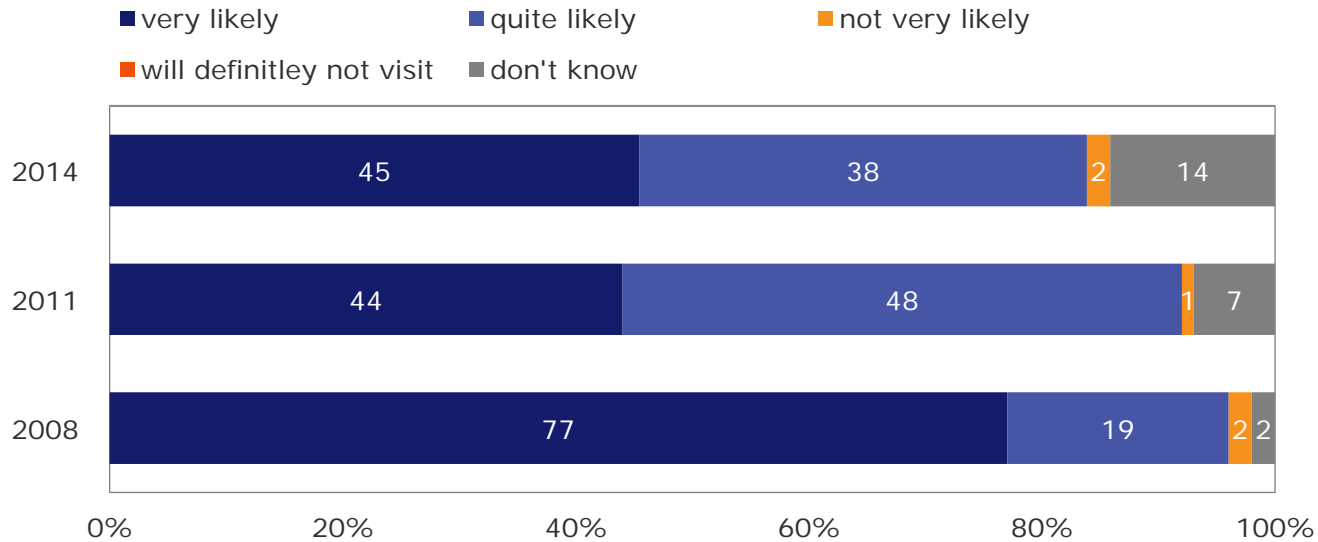
# Likelihood of visiting Tallinn again



## Approximately half of the visitors definitely want to visit Tallinn again

% of visitors to Tallinn, n=225

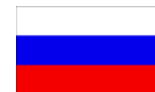
How likely are you to visit Tallinn again during the next 5 years?



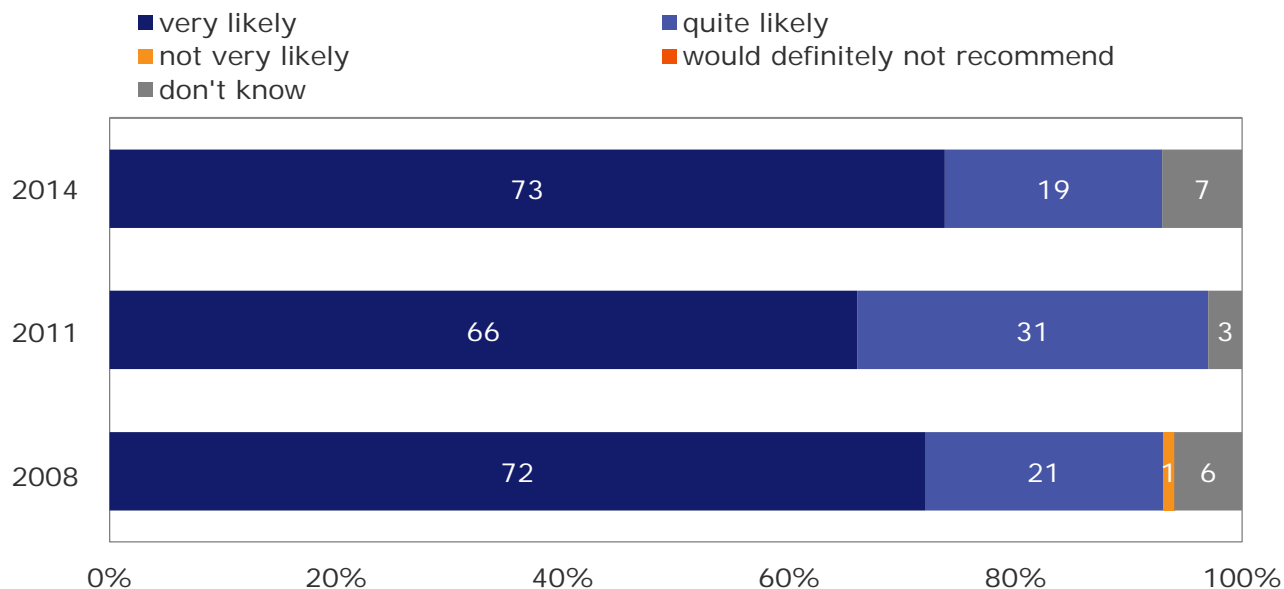
# Recommendation communication

## Overall willingness to recommend is very high

% of visitors to Tallinn, n=225



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



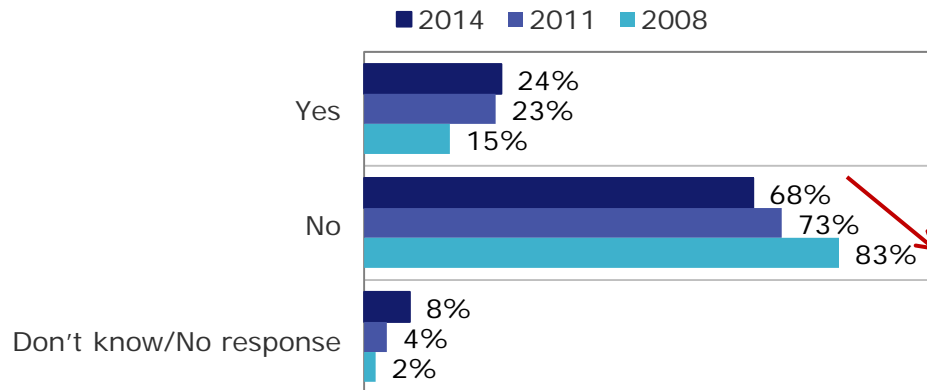


# Information about Tallinn Card and its usage

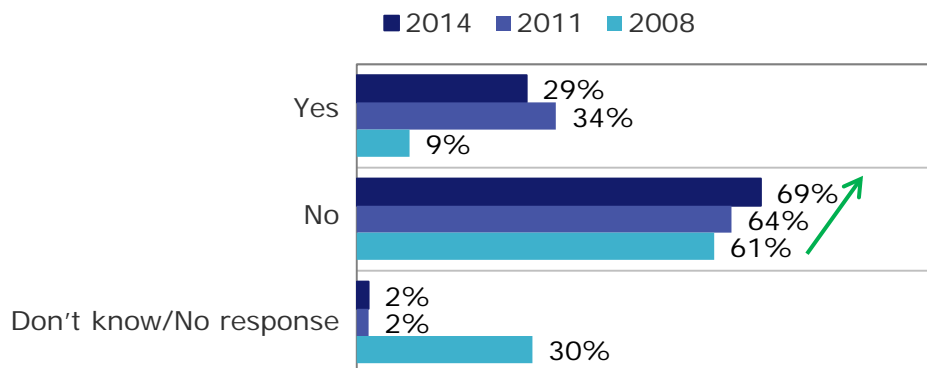
## Awareness has increased but usage has decreased

% of visitors to Tallinn, n=225

Do you know or have you heard anything about the Tallinn Card?  
n=225



Have you used the Tallinn Card?  
% of those who have heard of it, n=54

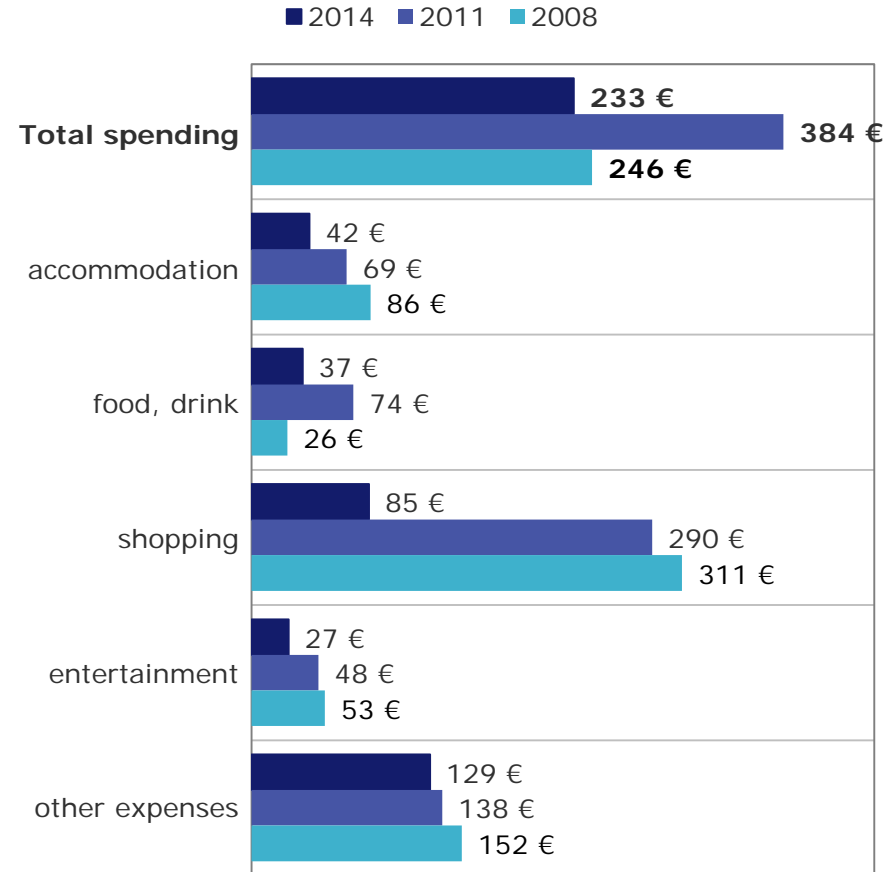




# Average spending per person per day

## Visitors spend significantly less on shopping

Average spending per person per day in EURO



# 7

## Appendix: Sample methodology



# Appendix 1

## Sample methodology 2014

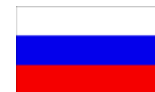


- The general population of the survey comprised all foreign tourists who visited Tallinn in 2014. During the course of the survey, 1727 foreign visitors were interviewed, including 1569 regular tourists and 158 cruise passengers.
- While compiling the sample, respondents were divided according to country 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)



<b>NUMBER OF ACCOMMODATED FOREIGN TOURISTS, 2014 (Statistics Estonia)</b>					
	<b>2014 1st quarter</b>	<b>2014 2nd quarter</b>	<b>2014 3rd quarter</b>	<b>2014 4th quarter</b>	<b>TOTAL</b>
Finland	120051	180643	195060	168291	664045
Sweden	7546	13872	16673	11806	49897
Norway	4741	8535	8647	8557	30480
United Kingdom	5649	11086	12641	9838	39214
Germany	5065	27062	38886	8636	79649
Russia	58604	40600	36903	40947	177054
Latvia	8668	11163	10917	12607	43355
Other countries	37990	98510	133096	58711	328307
<b>Total:</b>	<b>248314</b>	<b>391471</b>	<b>452823</b>	<b>319393</b>	<b>1 412 001</b>

<b>ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS TO TALLINN 2014, ACCOMMODATION (without cruise)</b>			
	<b>paid+free accommodation</b>	<b>1-day visitors</b>	<b>TOTAL</b>
Finland	746118	993085	1739203
Sweden	57419	29579	86998
Norway	36416	5586	42002
United Kingdom	49954	9303	59257
Germany	94820	9607	104427
Russia	246593	111307	357900
Latvia	69703	29167	98870
Other countries	404818	135660	540478
<b>Total:</b>	<b>1705841</b>	<b>1323294</b>	<b>3029135</b>

# Data weighting (3)

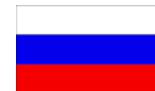


<b>ASSESSMENT OF TOTAL NUMBER OF FOREIGN VISITORS 2014, SEASONALITY (without cruise)</b>					
	<b>1st quarter</b>	<b>2nd quarter</b>	<b>3rd quarter</b>	<b>4th quarter</b>	<b>TOTAL</b>
Finland	314426	473123	510882	440772	1739203
Sweden	13157	24187	29070	20584	86998
Norway	6533	11761	11916	11792	42002
United Kingdom	8536	16752	19103	14866	59257
Germany	6641	35481	50982	11323	104427
Russia	118463	82070	74596	82771	357900
Latvia	19767	25457	24896	28750	98870
Other countries	62541	162173	219111	96653	540478
<b>Total:</b>	<b>550064</b>	<b>831004</b>	<b>940556</b>	<b>707511</b>	<b>3029135</b>

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

# Appendix 3

## Project team



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

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

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Tallinn visitor survey 2014

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