





Table of contents



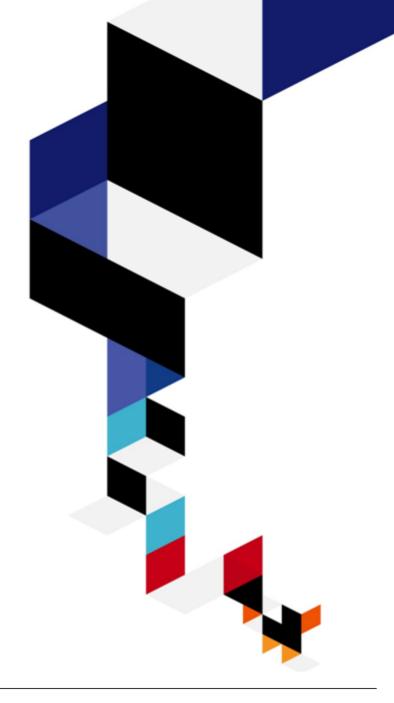
1	
Intoroduction	03
2	
Summary of the main results	05
3	
The visitor's profile, purpose and route of the trip	10
4	
Spending the night in Tallinn and accommodation	16
5	
Planning a trip to Tallinn	21

6	
Visit and impressions of the trip	28
7	
Appendices	41





Introduction







Introduction

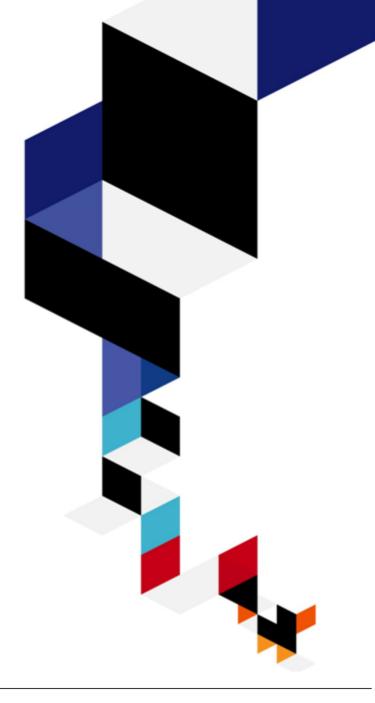


- Using the same methodology, the survey of foreign visitors to Tallinn has been ordered by Tallinn City Enterprise Board and has been carried out since year 2002. Data is being collected throughout the survey year among foreign visitors who are leaving the country at mainland border crossings, Port 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 spending 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 those foreign visitors to Tallinn who come from Russia and Latvia.
- 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. Concerning Latvia, comparative results are available only from one survey period since they were not surveyed separately before.





Summary of the main results







Summary (1)

A tourist from Russia visits Tallinn as a part of a longer trip, but stays here longer



- In 2011, 321 thousand visitors came from Russia, comprising 12% of all Tallinn tourists in case cruise voyagers and turnaround tourists are considered and 13% without cruise and turnaround tourists. The proportion of Russian tourists has been growing steadily over the past three survey periods (4%, 7%, 13%).
- Compared to visitors from other countries, Russian tourists still include more of those aged 25-44 and white-collar workers (53%) and less pensioners. The amount of women has been growing steadily since 2003 and has by now reached 66%.
- In comparison with other countries, there are relatively more of those who travel alone every third traveller came on one's own. For 41% of Russian tourists, Tallinn is not the only travel destination and this is higher than the average (26%).
- The proportion of those on a vacation is similar to the average, but there are less one-day visitors and more of those who come to visit friends/acquaintances. Unlike tourists from other countries, visitors from Russia consider a trip to Tallinn as a short break (every third traveller). The proportion of those staying overnight has decreased, but those who stay overnight, spend a night in Tallinn more often than the average (on average 2 nights, for this target group 3,5 nights). The number of nights spent in Tallinn and Estonia is smaller than before and the number of nights spent in other countries has increased.
- While in Tallinn, most visitors (66%) use accommodation establishments, but there is also a higher than the average number of those who spend their nights at friends' and relatives'. Compared to earlier periods, the proportion of those who use accommodation establishments, has risen, including those who stay at mid-range hotels.
- In terms of booking accommodation, internet is now primary and takes the lead over booking accommodation via a travel agency/tour operator. Compared to other countries, visitors from Russia also use the help of local acquaintances to book accommodation. The time of making the booking is shorter than for visitors from other countries, but there are less last-minute bookings than in previous periods. The proportion of those who book ahead more than a month has also risen.
- The proportion of first-time visitors has decreased from 28% to 15%, which is why the average number of earlier visits has increased. Approximately half of visitors have visited Tallinn before 1-4 times.





Summary (2)

Visitors from Russia have become more demanding and spends as

much as before

- Communication via media and other destination marketing channels have not reached visitors from Russia. The information is passed on practically by word-of-mouth only, primarily via local relatives/acquaintances.
- Compared to tourists from other countries, visitors from Russia mainly use their own car to move around the city (since there are more of those who arrive by their own car) and taxi is the second most important means of transport. Even though those who walk in the city account for 63%, it is still below average. Nearly everyone visits the old town, but every fourth also makes it to Pirita and Kadriorg. However, compared to previous years, the visiting of other parts of Tallinn has become significantly less popular.
- Similar to previous years, the main activities for Russian visitors are shopping, walking around the city and visiting cafes/restaurants. Compared to previous years, the proportion of those who visit pubs/nightclubs and spas, beauty parlours has also increased steadily. Generally, the tourists of 2011 have been less active, which is probably due to less time spent in Estonia
- Compared to tourists from other countries, Russian visitors visit cafes/restaurants less often (58%), they walk less often around the city, come here less often for business or for a conference. The proportion of those who take part in cultural events and those who go shopping stands at an average level.
- 2011 visitors from Russia are more critical in their evaluations to Tallinn as well as in satisfaction with the service than during earlier periods. This is probably because there is less element of surprise (less first-time visitors) and there are more white-collar (demanding) tourists. Nevertheless, the general impressions are similar to the total average and most aspects are rated equally or even higher (e.g. safety, tidiness, people, prices, service-staff and their language skills). The city´s night- and cultural life, the sufficiency of good restaurants, weather, international transport, moving around the city and availability of tourist information received lower evaluations than the total average.
- Because of the price of the package holiday, sums of money spent in Tallinn per person per day have increased considerably, but other spending (excl. food/drinks) has slightly decreased. Nevertheless, Russian tourists spend the most money per person compared to all other countries (2-3 times more than the average) and the biggest difference is in the sum of money spent on shopping (272 EUR vs. the average of 98 EUR).
- Definite intention to recommend and revisit has fallen. Compared to other countries, the evaluation "will probably visit" in more often given.





Summary: Latvia (1)

Tallinn as a holiday destination is the main trip and the duration of the trip has increased

- In 2011, 76 thousand visitors from Latvia came to Tallinn, which accounts for 3% of the visitors.
- Compared to other countries, Latvian tourists involve relatively large number of those aged under 24 and pupils/students (almost every fourth). The proportion of white-collars is also large (48%). Travellers come mostly alone.
- In terms of the purpose of the trip, Latvian tourists resemble Russian visitors: the number of holiday-makers is close to the average, there are less one-day visitors and more of those visiting friends/acquaintances. To most of them (70%), Tallinn is the main destination.
- Nearly all visitors stayed for the night in Tallinn and the number of nights spent here is higher than the average (both indicators have increased over the previous periods). Most (64%) spend the night in accommodation establishments, but there is a higher than the average proportion of those who spend the night at friends/relatives and this situation has remained unchanged. Economy hotels are being substituted by mid-range hotels.
- Internet is the most important channel for booking accommodation, but relatively more visitors come with an organized group. Most of those staying overnight made the booking 1-4 weeks earlier, which is higher than the total average.
- The proportion of first-time visitors has not changed and the number of those who have visited Tallinn 1-2 times before has risen.
- Prior information on Tallinn mostly comes from business connections/sources, therefore, this target group is significantly different from others. In addition, Latvian tourists use substantially more prior information on events (the largest number of participants in events). Internet is the most important medium here and the primary source is www.tourism.tallinn.ee. Also, this target group has more of those who rely on social media (10%).
- Tourists from Latvia move around the city on foot significantly less than the total average and the primary means of getting around include public transport and relatively more often personal car, however taxi is not so popular. Unlike visitors from other countries, Latvians visit more often other areas of Tallinn as well (at least every third makes it to other parts of Tallinn) however, they make it relatively less often to the old town (84%).





Summary: Latvia (2)

A visitor from Latvia is active, demanding and spends as much as the average

- ■In year 2011, the visitors from Latvia have become more active and more versatile in their activities (time spent here was also longer). Shopping, sightseeing, visiting cafes/restaurants and business-related activities are on the increase. In general in 2011 Latvian tourists shopped, walked around the city and use the spa/beauty services as often as tourists from other countries. However, the number of attending cultural events (81%, incl. every second visited festivals/events), eating out (87%), attending work/conference related events (48%) and sports competitions (8%) was considerably higher than the average.
- ■Because of the increase in the prices of package holidays, sums of money spent per day per person in Tallinn are considerably higher than before, but other expenditures have remained relatively on the same level as previously. Spending of Latvian tourists per person are somewhat smaller than the average of tourists from other countries, except on accommodation and food, on which they spend slightly more. However, a Latvian tourist spent per day per person more than a tourist from United Kingdom, Germany or Spain.
- ■The visitors´ general impressions of the city have significantly improved over the years and currently this is higher than the average of other countries. Kind people, the ease of moving around the city, public transport and overall organization of traffic is valued more highly than on average. Latvian visitors give lower than the average evaluations to the service sphere, nightlife, adequacy of sights, restaurants and value for money.
- ■In spite of the higher than the average general impressions and positive evaluations, tourists from Latvia are less eager to promise revisit or recommend Tallinn as a travel destination (less of those who would definitely revisit and recommend), which may be due to the desire to also travel in other countries.





The visitor's profile, purpose and route of the trip

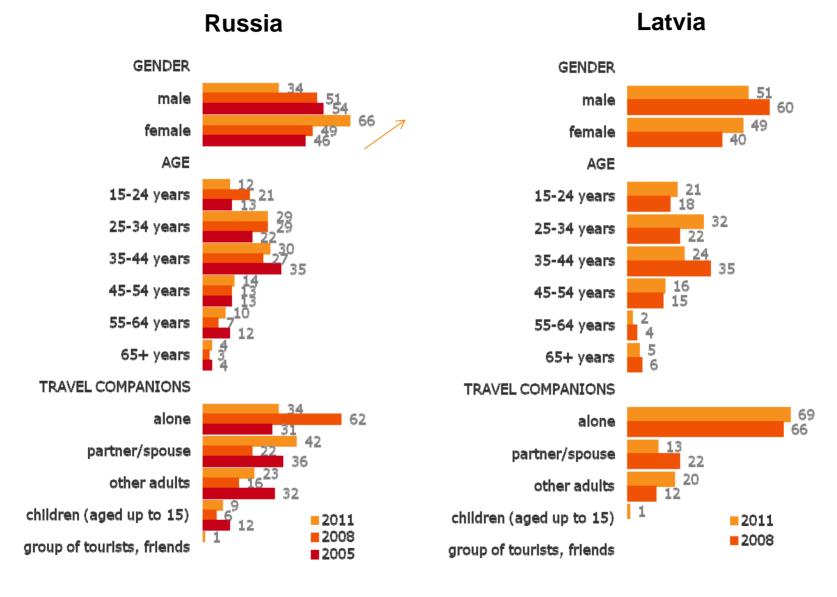






Respondents profile (1)



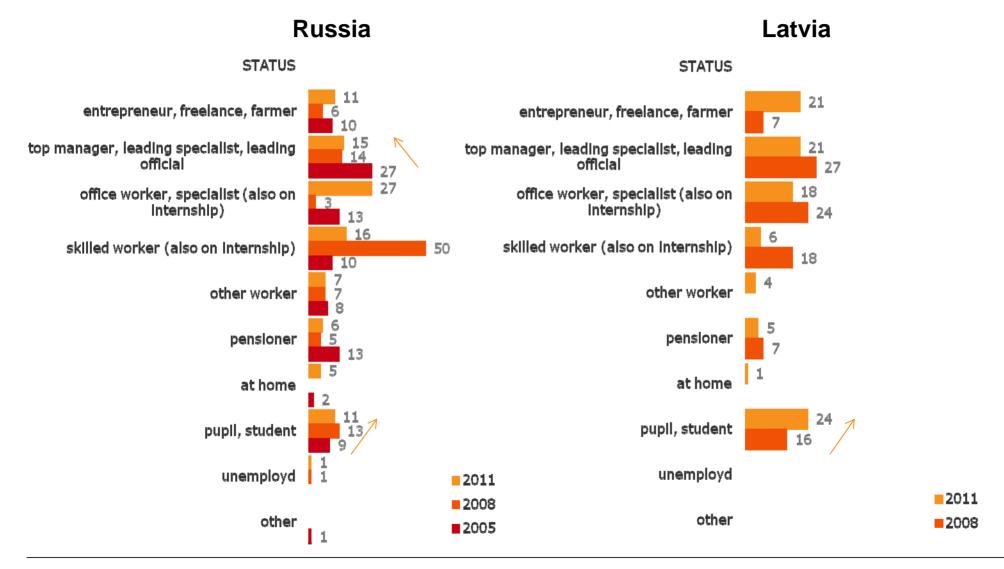






Respondents profile (2)







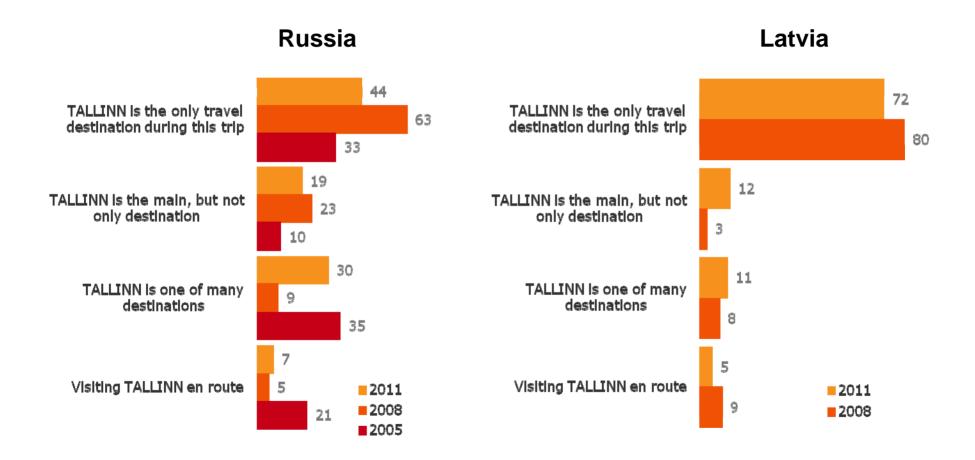


Tallinn as a travel destination



Tallinn is the main destination for visitors from Latvia

% of all visitors who have spent at least one night away from home (in 2011, 82% of all visitors from Russia and 100% of visitors from Latvia)



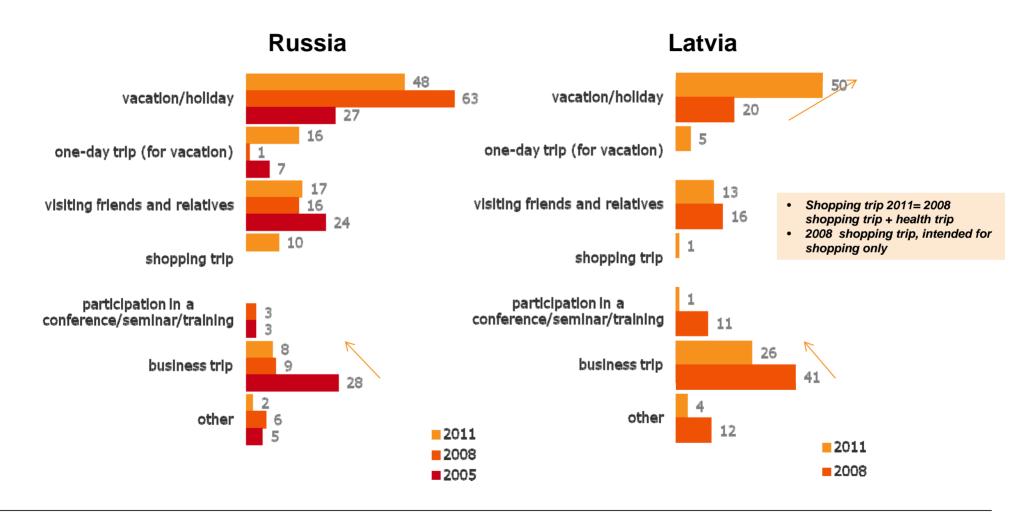




Purpose of the trip

Proportion of business trips decreases in favour of vacations





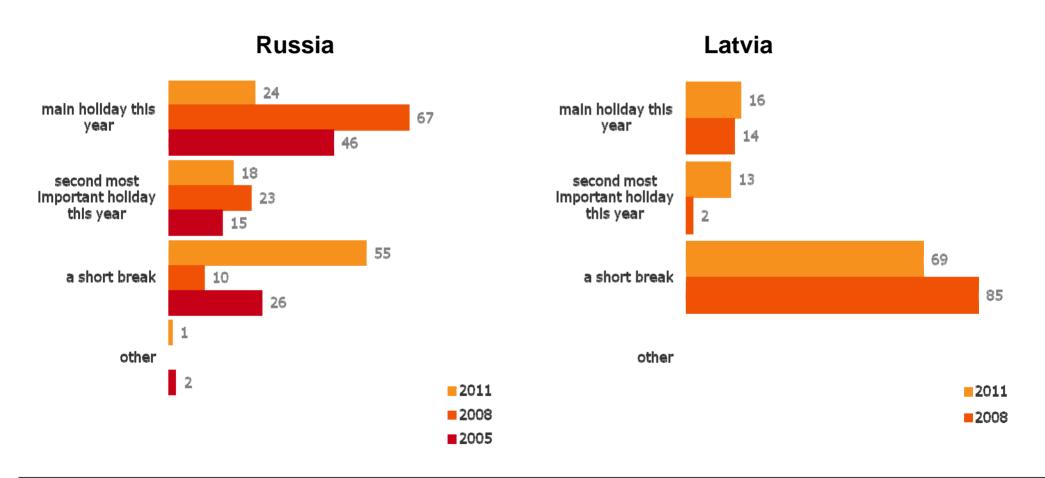




Meaning of holiday trip A trip to Tallinn is a short break



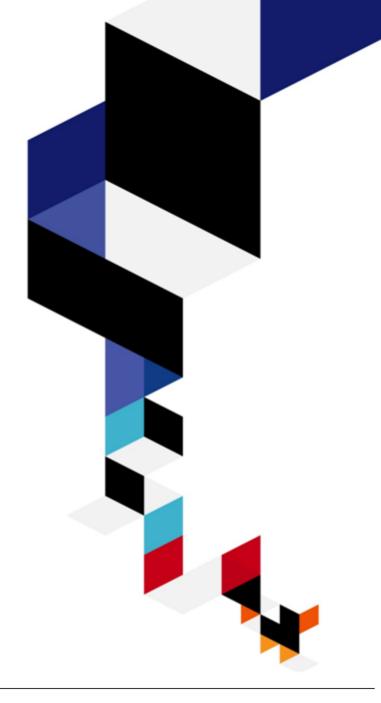
% of all visitors who are on vacation or visit friends/relatives (in 2011 65% of all Russian visitors and 63% of all Latvian visitors)







Spending the night in Tallinn and accommodation

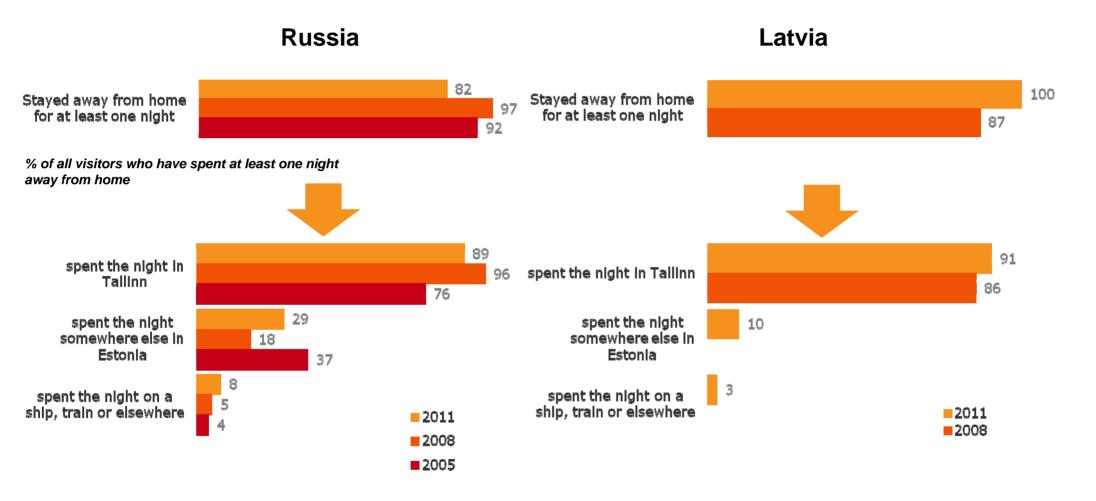






Spending the night away from home





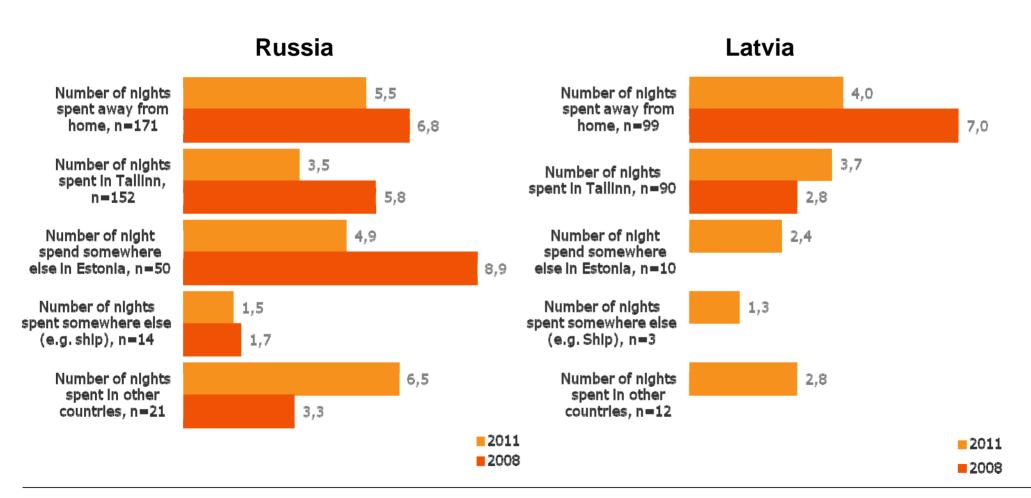




Spending the night away from home The average length of a trip has decreased



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



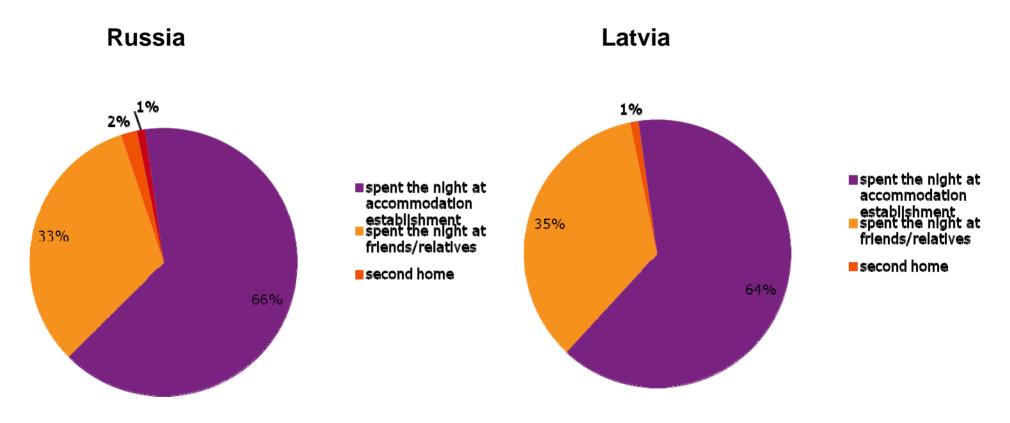




Spending the night in Tallinn Although most use accommodation establishments, their proportion is lower than for visitors from other countries



% of all visitors who have spent at least one night in Tallinn : Russia, n=152; Latvia, n=90



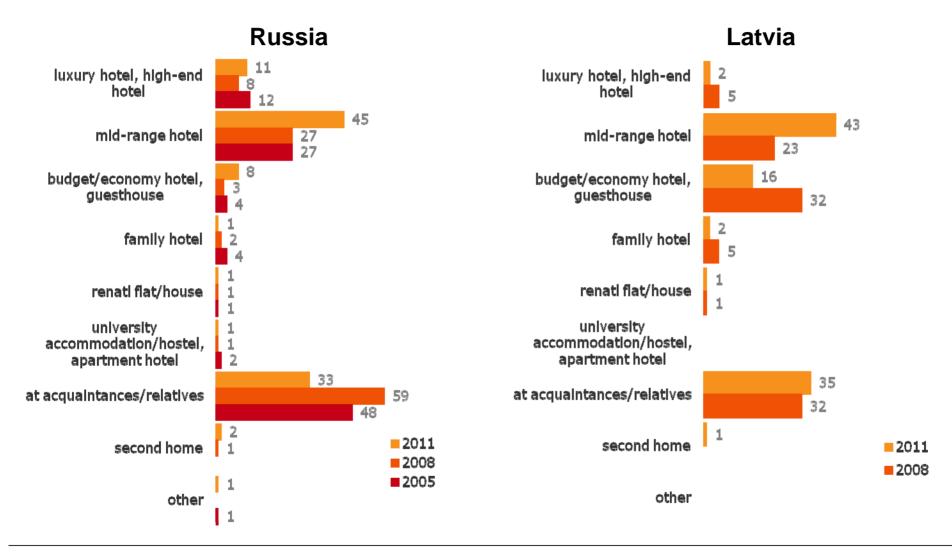




Spending the night in Tallinn

Spending the night in a mid-range hotel has increased significantly

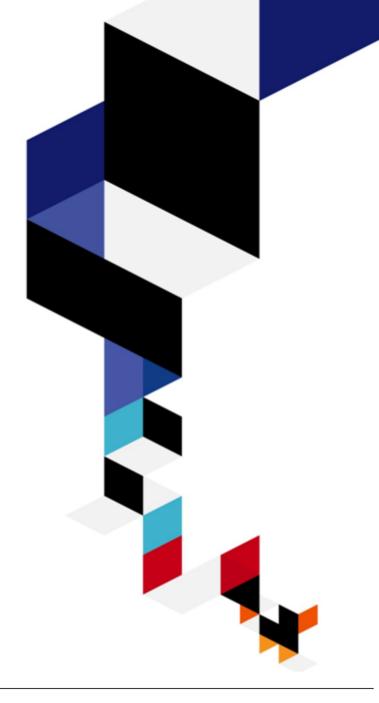
% of all visitors who have spent at least one night in Tallinn : Russia, n=152; Latvia, n=90







Planning a trip to Tallinn







Sources of information on Tallinn

Marketing channels have not reached visitors from Russia Half of Latvian visitors acquire prior info from where they work

% of all the visitors who answered the question: Russia, n=180; Latvia, n=87



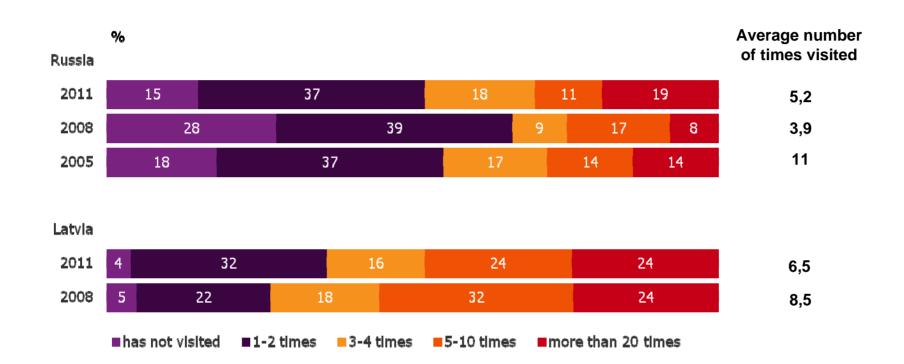
Because the list of information sources was significantly reorganized for the 2011 survey, comparison with previous years is not provided.





The number of previous visits to Tallinn There were less first-time visitors from Russia





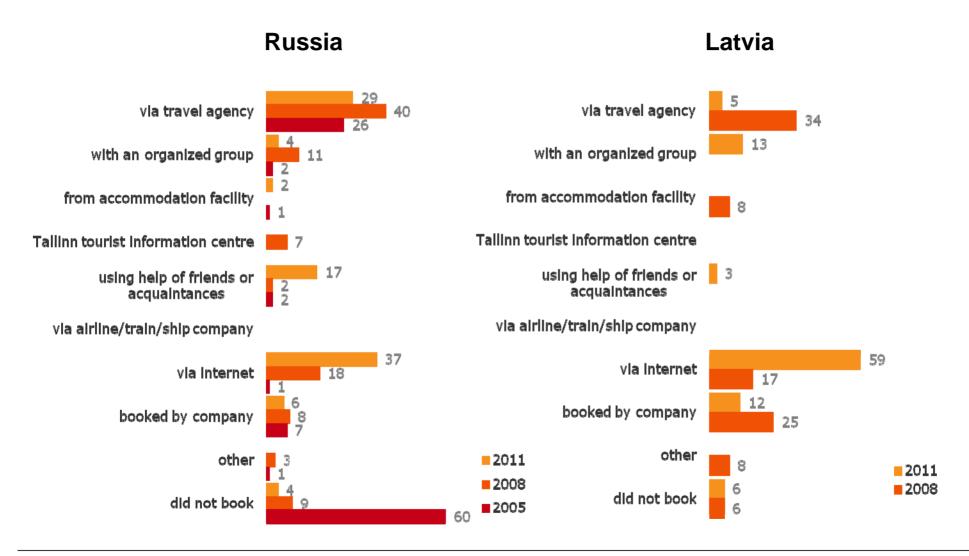




Booking accommodation

Internet has become the main channel for booking

% of all visitors who have spent at least one night in Tallinn and have used accommodation: Russia, n=102; Latvia, n=58





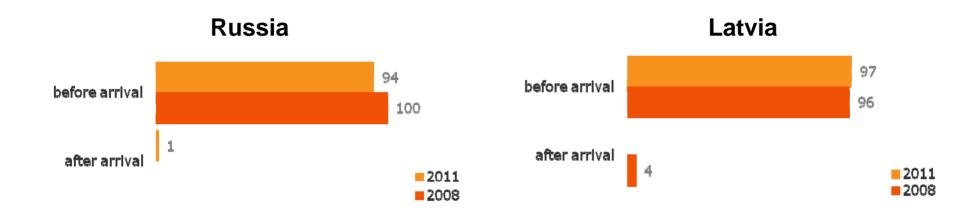


Booking accommodation

Booking is made before the trip



% of all visitors who have spent at least one night in Tallinn; who booked accommodation and stayed at an accommodation facility: Russia, n=98; Latvia, n=53



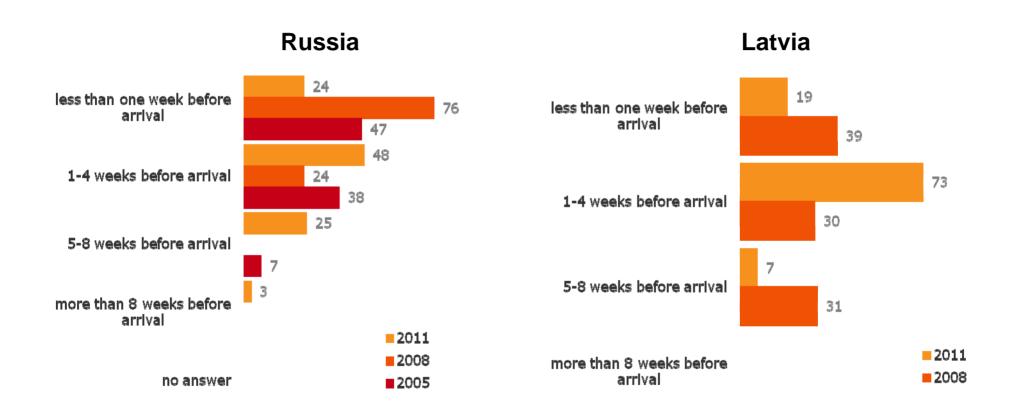




Time of booking accommodation

The habit of last-minute booking is subsiding

% of all visitors why spent at least one night in Tallinn and booked accommodation before arrival in Tallinn: Russia, n=93; Latvia, n=51



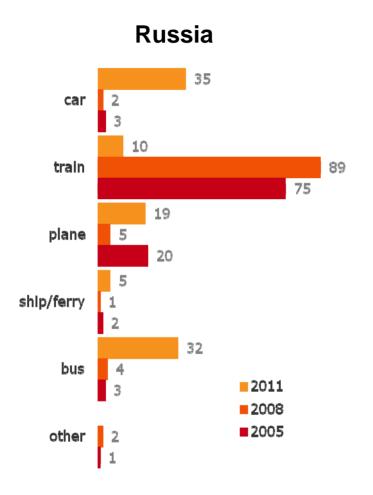


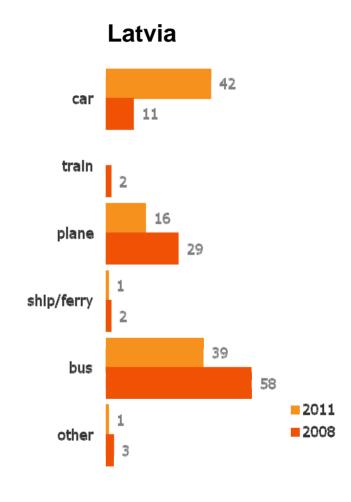


Transport used to arrive in Tallinn

Transport by land is dominating











Visiting Tallinn and impressions of the trip: visitors from Russia and Latvia



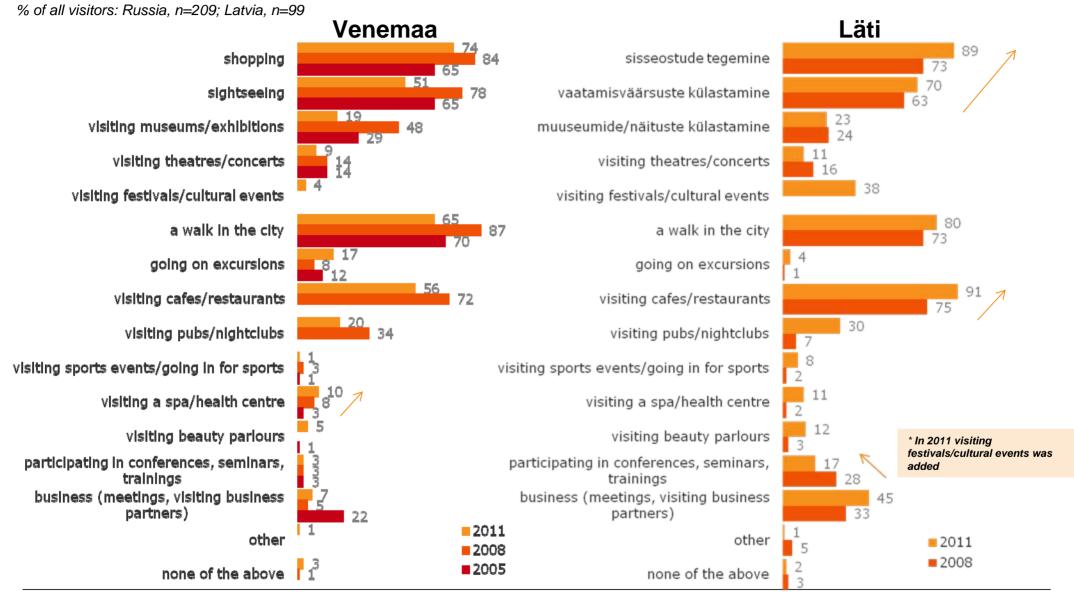




Activities in Tallinn:

Latvians have become more active and Russian tourists less active consumers



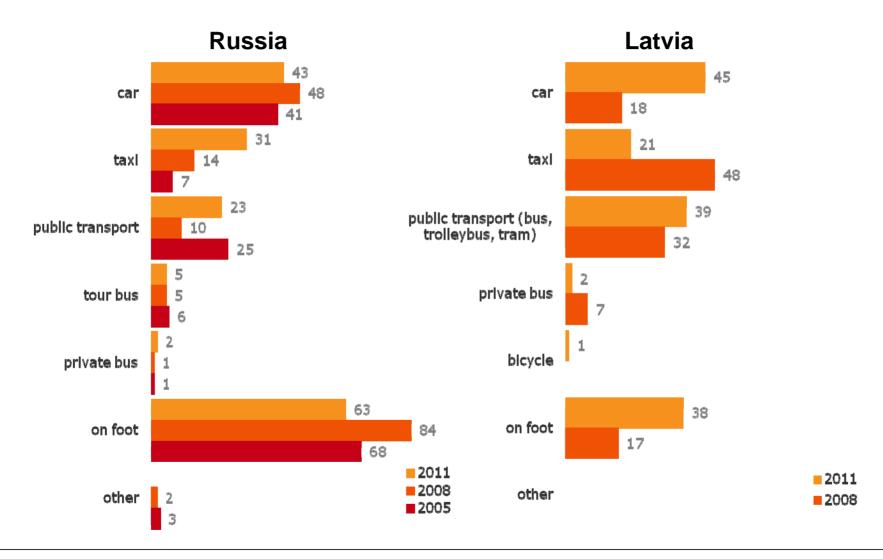






Transport used in Tallinn

Cars and public transport are used more often than the

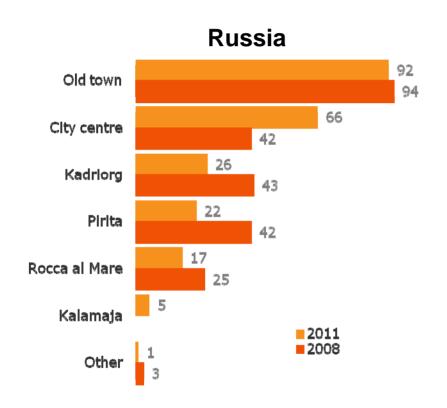






Areas visited in Tallinn





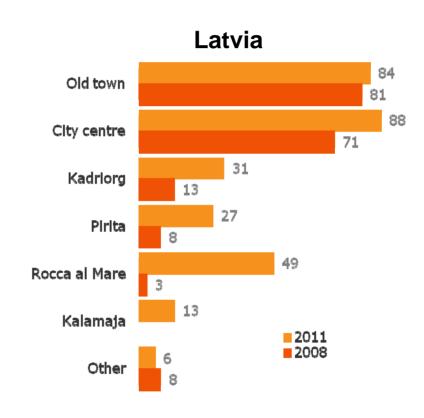


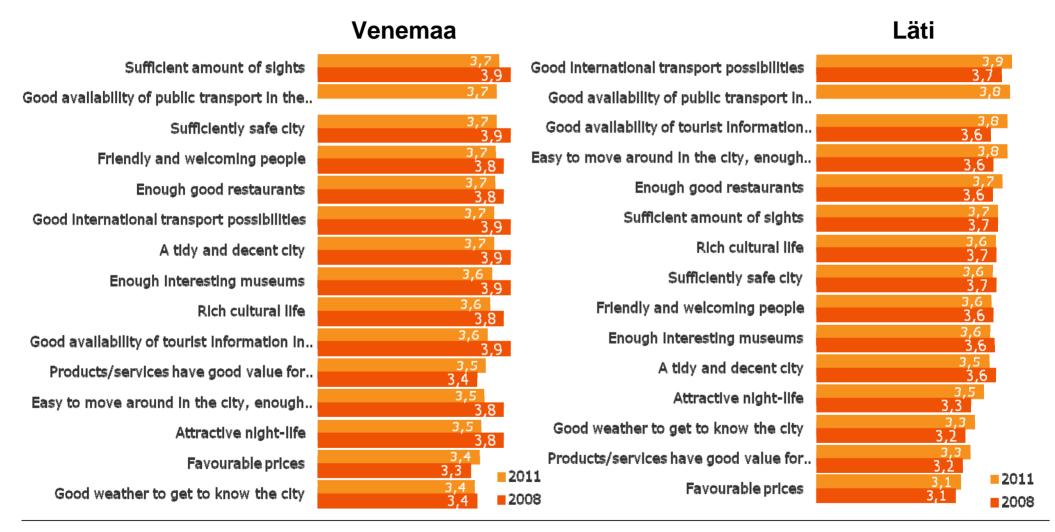




Image of Tallinn (1)

For Russian tourists, element of surprise is decreasing, evaluations are high Evaluations of Latvian tourists have improved

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







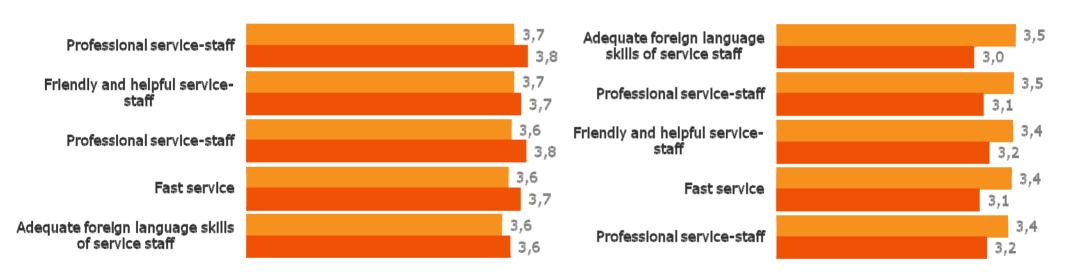
Service culture in Tallinn

Evaluations of Latvians have improved significantly, although they still remain lower than the average

Evaluations of Russian visitors have slightly decreased, but are still above average compared to other countries

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

Russia Latvia







Positive and negative comments on Tallinn Open-end comments of tourists from Russia



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

Would you like to comment on Tallinn – something you are <u>very satisfied</u> with or what was <u>the most positive</u> thing in Tallinn? /38% or 79 respondents replied/	Would you like to comment on something that you are <u>dissatisfied</u> with or something that <u>could be better</u> in Tallinn? /25% or 52 respondents replied/
Old town and its parts (17% of those mentioned)	Do not know – nothing negative (10%)
Positive experience with Estonians (5%)	Traffic jams, parking (6%)
Cultural events, -venues, -centres (2%)	Dirty or slippery streets (3%)
Restaurants and bars (1%)	Language problem (1%)
Other (8%)	Hotels (1%)
Cannot point out anything (4%)	





Positive and negative comments on Tallinn Open-end comments of tourists from Latvia



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

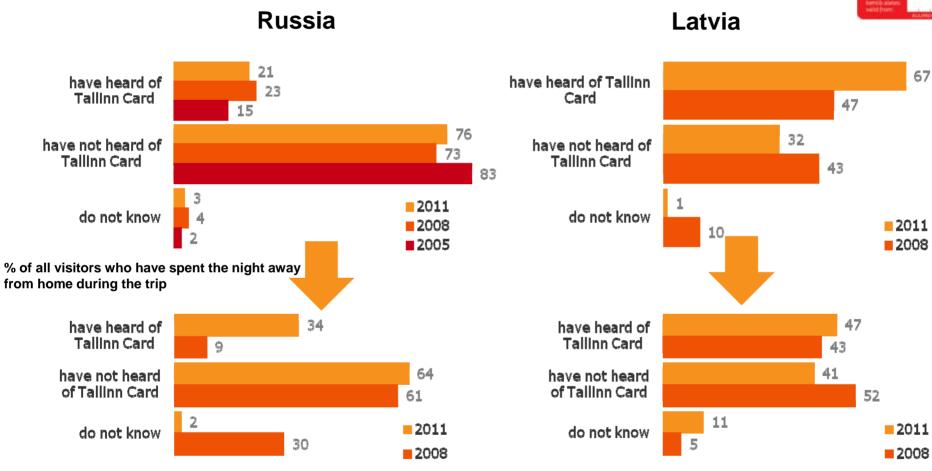
Would you like to comment on Tallinn – something you are <u>very satisfied</u> with or what was <u>the most positive</u> thing in Tallinn? /21% or 21 respondents replied/	Would you like to comment on something that you are <u>dissatisfied</u> with or something that <u>could be better</u> in Tallinn? /13% or 13 respondents replied/
Old town and its parts (9% of those mentioned)	Do not know – nothing negative (5%)
Nightclubs, casinos (2%)	Dirty or slippery streets (3%)
Restaurants, bars (2%)	Weather (2%)
Hotels, spas (1%)	Prices have increased (1%)
Positive experience with Estonians (1%)	Traffic jams 1%)
Pirita and Kadriorg (1%)	
Cannot point out anything (1%)	
Othe (5%)	





Information on Tallinn Card and its usage Usage of the card has increased





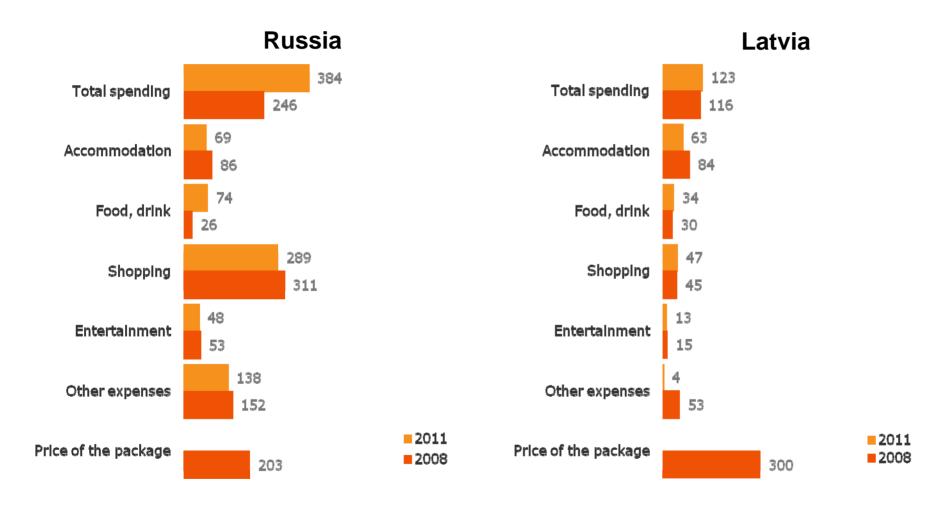




Average spending per person per day

Has increased because of higher price for holiday package, other expenditures are rather decreased

Average spending per person per day in EUR



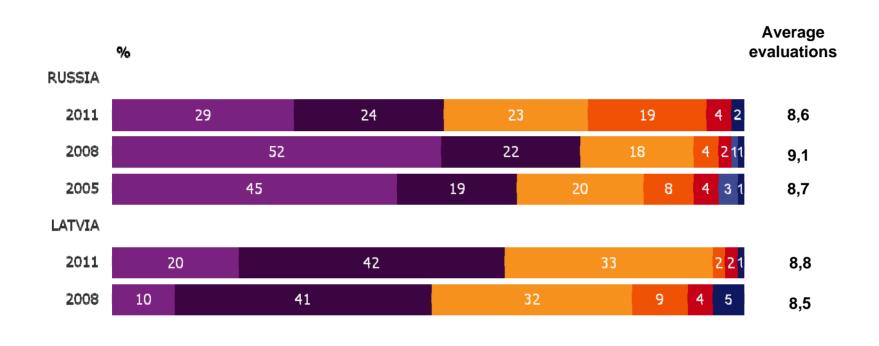




Evaluation of overall impression on trip to Tallinn Overall impressions of the city have reached the average of all foreign visitors (8,6)



% of all visitors: Russia, n=209; Latvia, n=99



■10 points - very good ■9 points ■8 points ■7 points ■5-6 points ■1-4 points - very bad ■do not know/no answer

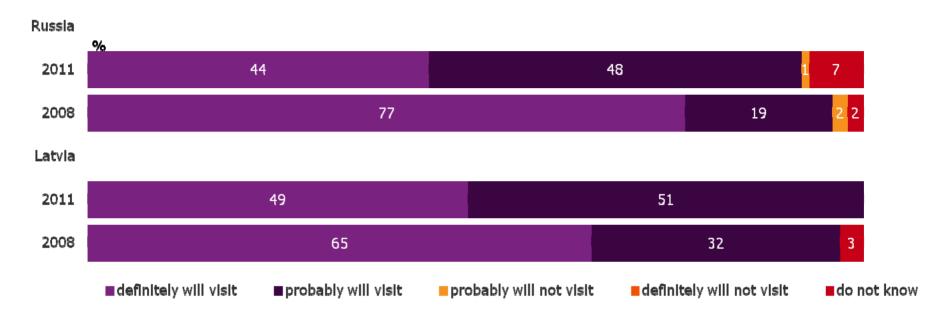




Likelihood of visiting Tallinn again

Compared to earlier periods, less people are convinced that they will visit Tallinn again

% of all visitors: Russia, n=209; Latvia, n=99



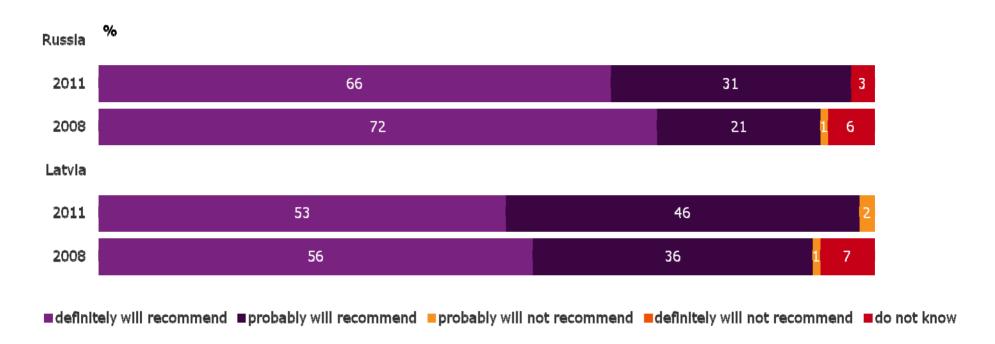




Recommendation communication

Overall willingness to recommend has slightly increased, but there are less of those who would definitely recommend

% of all visitors: Russia, n=209; Latvia, n=99







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.





Sample methodology 2011 (2)



- Size of Russian sample:
 - 2011 209 visitors
 - 2008 155 visitors
 - 2005 199 visitors
 - 2004 201 visitors
- In 2011, 55% of those who arrived from Russia were interviewed in Narva, 5% at the train station, 20% at the airport, 17% in the harbour and 3% at Ikla border crossing (In 2008 80% in Narva, 10% at the airport, 9% at the train station and 1% in Ikla).
- The proportion of visitors from Russia has increased: they account for 13% of all foreign visitors to Tallinn (4% on 2005 and 7% in 2008).
- Latvia as a target market was viewed separately for the first time in 2008.
- The size of the Latvian sample was 99 respondents. Latvians account for 3% of all foreign visitors to Tallinn (8% in 2008).
- In the 2011 survey, 73% of Latvian visitors were interviewed at Ikla border crossing, 13% at the airport and 12% in the harbour. In 2008, those figures stood at 55%, 38% and 7% respectively.
- Thus report presents survey data according to weighing method I (see following).





Sample methodology 2011 (3)



- 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)

- I a (= 0)								
	Н	Α	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)

	Н	Α	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, Russia, 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
14.00 - 17.00 after 17.00	567 407
after 17.00 Weather on the day the	
after 17.00 Weather on the day the interview was conducted	407
after 17.00 Weather on the day the interview was conducted windy	407 654

cloudy, dry

316

	Survey into foreign visitors to Tallinn 2005-2011
TNS	©TNS 2012



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			





Data weighing (3)



EVALUATIONS ON seasonality (excl					
	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%	





Further information



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

The client:

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Project manager of the survey

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Sample design:

Questionnaire programming:

Interview coordination:

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