

**Survey of foreign visitors to
Tallinn
2018**

March 2019



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1

Introduction and The background of foreign visitors in Tallinn



Introduction

- At the request of the City Tourist Office & Convention Bureau of the Tallinn City Enterprise Department, a Survey of Foreign Visitors in Tallinn has been conducted under a common methodology since 2002. The data are collected from the foreign visitor leaving the country throughout the reference year at the land border crossing points, at the Port of Tallinn, at the Tallinn Airport and at the Tallinn Bus Station.
- **The main purpose of the survey is to gather detailed information about the foreign visitors of Tallinn, their purpose of travel, assessments and expenses incurred during the trip. The result of the survey will indicate:**
 - from which country and for how long a time have foreign visitors arrived in Tallinn;
 - what is the purpose of visiting Tallinn and what motivated foreign visitors to choose Tallinn as the destination of their trip;
 - which services targeted to foreigners are used by the visitors of the city and how they evaluate the quality of the services;
 - how much and for what do foreign visitors spend money and how the price/quality ratio of products/services is assessed.
- All in all, the results of the survey will be used as an input for the assessment of the competitiveness of Tallinn as a tourist city and for the planning of development activities, with the aim of increasing tourism income of Tallinn and making Tallinn even more attractive and tourism-friendly.
- In this report, the results of the survey are presented as weighted by the proportion of the population (see weighting methodology in the Annexes at the end of the report). The results for 2018 are presented with existing reference data from the results of the year 2014.
- This report describes the foreign visitors of Tallinn as a whole, summaries of cruise passengers and foreign visitors from Finland, Russia, Latvia, Germany and Great Britain are presented as separate reports.

Summary

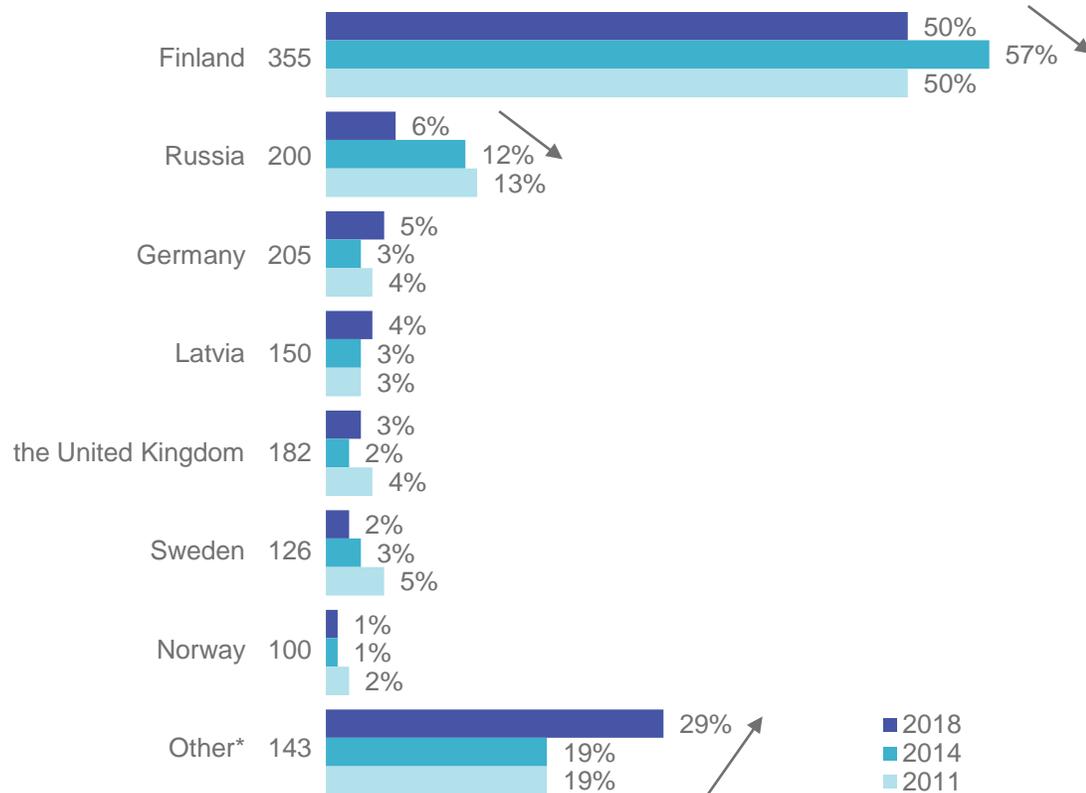
Foreign visitors to Tallinn in 2018

- **In 2018, a total of 3.93 million foreign visitors (including cruise passengers) visited Tallinn.**
 - Compared to 2014, the number of foreign visitors to Tallinn together with cruise passengers has increased significantly - from 3.5 million to → 3.9 million.
 - The number of foreign visitors staying overnight in Tallinn and the share of cruise passengers have increased significantly.
- **Not counting cruise passengers, in 2018, 3.29 million foreign visitors visited Tallinn**, which is the highest result in the last two decades (3.03 million in 2014, 2.28 million in 2011, 2.58 million in 2008, 2.68 million in 2005).
- Compared to the year 2014, **the share of foreign visitors from Finland and Russia, the priority markets for Tallinn, fell significantly.** However, it is compensated by rapid growth of **foreign visitors from other countries** (29% in 2018 and 19% in 2014) (not from the countries that are currently the priority countries of origin for Tallinn).
- **Half of the foreign visitors to Tallinn are Finns**, but compared to 2014 their interest in Tallinn has somewhat decreased (57%→50%). Apparently, the alignment of general price level of Estonia with other European countries which no longer motivates so many Finns to come to Tallinn for a cheap shopping trip is playing a role here. The favorable offers from low-cost airlines operating in Finland to other destinations may also be behind the decline in interest. Earlier, foreign visitors from **Russia** used to make up a significant share of tourists of Tallinn, but now their share has decreased twice (6% in 2018 and 12% in 2014). On the positive side, however, the growth of overnight stays can be seen in the case of travelers from Russia - those who come prefer to stay longer in Tallinn.
- Compared to the year 2014, there have been no significant changes in the proportions of one-day visitors and foreign visitors staying overnight in Tallinn. The share of overnight visitors has increased especially for visitors from Sweden, Great Britain and Russia. For foreign visitors from other countries (currently non-priority countries of origin for Tallinn), the share of one-day visitors has increased significantly (39% in 2018 and 25% in 2014).
- There have been no major changes in the socio-demographic profile of foreign visitors to Tallinn over the last three years. The women-men ratio among tourists is still 50-50, and there are tourists from all age groups. At the same time, the proportion of people aged 25–34 has increased somewhat (17% in 2014→ 24% in 2018). Nearly six out of ten foreign visitors (57%) travel with their partner/spouse or other adults. At the same time, travel with other adults has somewhat decreased (31% in 2014 → 23% 2018) and travels with a tourist group or a group of friends have increased (3% in 2014 → 11% 2018). In the last three to four years, the share of office workers and specialists has also increased somewhat (18% in 2014 → 25% 2018).
- For 30% of all visitors, it was the first time to visit Tallinn, and 70% have already visited Tallinn before.
- The low season of tourism (1st quarter and 4th quarter) accounted for 41% of all foreign visitors and the high season (2nd quarter and 3rd quarter) accounted for 59% of all foreign visitors to Tallinn.

Country of origin of the foreign visitors to Tallinn

% of Tallinn foreign visitors, n=1461

44. Please, state your country of residence.

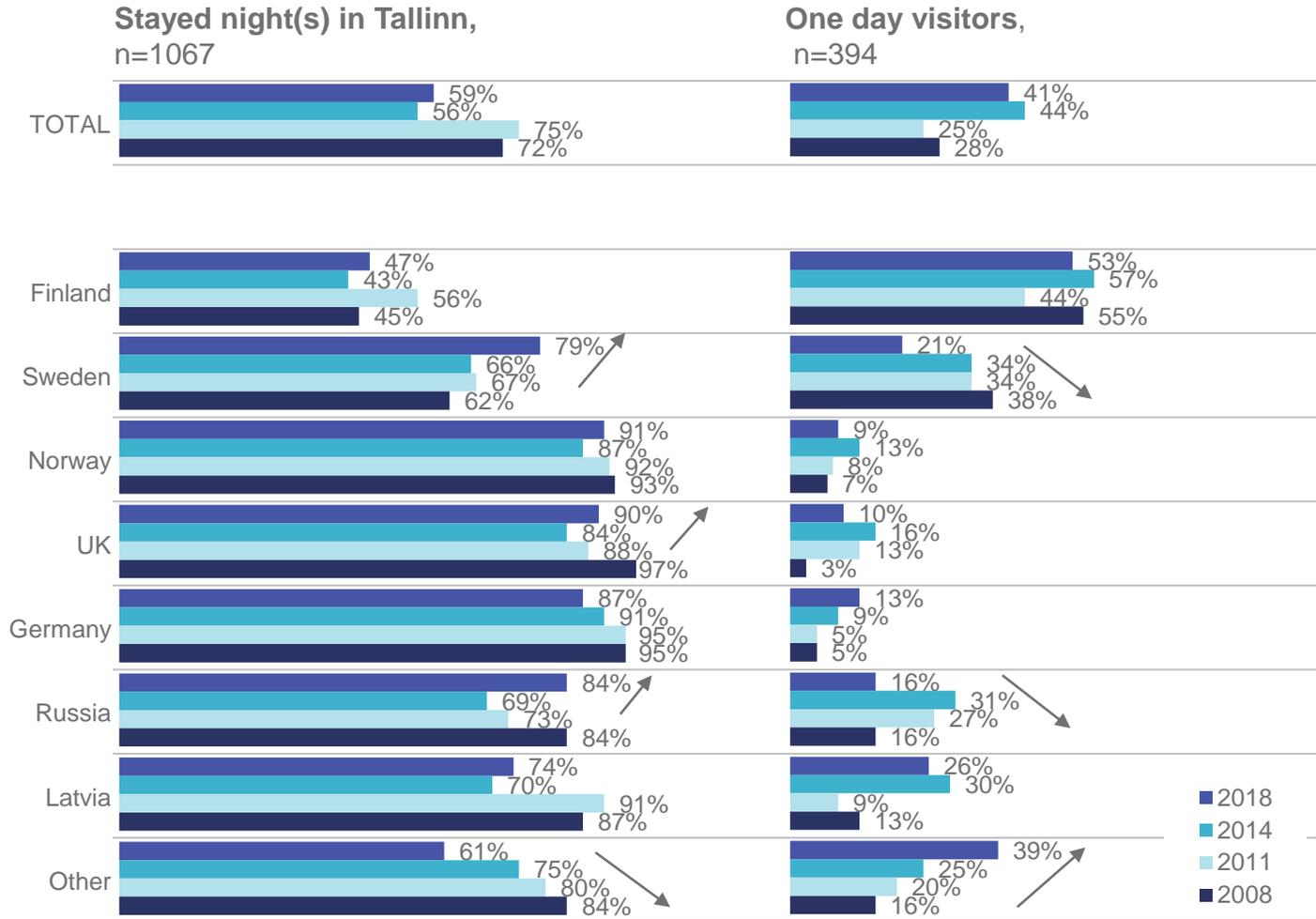


The following countries of residence were listed under "Other country":

- United Arab Emirates (1)
- Australia (9)
- Australia (9)
- Belgium (1)
- Bosnia and Herzegovina (1)
- Brazil (5)
- Ecuador (1)
- Philippines (1)
- China (7)
- Spain (7)
- Hong Kong (2)
- Ireland (2)
- India (4)
- Israel (2)
- Italy (6)
- Japan (8)
- Canada (5)
- Lithuania (4)
- Korea, South (1)
- Morocco (1)
- Moldavia (1)
- Nepal (1)
- Pakistan (1)
- Poland (2)
- Portugal (3)
- France (8)
- Saudi Arabia (1)
- Singapore (3)
- Sri Lanka (1)
- Switzerland (3)
- Denmark (3)
- Thailand (2)
- Taiwan (1)
- Czech Republic (3)
- Ukraine (15)
- USA (11)
- Belarus (7)
- Vietnam (1)
- New Zealand (1)

Foreign visitors to Tallinn staying overnight vs. single day visitors 2008–2018

% of Tallinn foreign visitors, n=1461



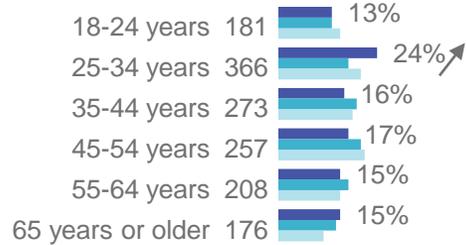
The socio-demographic profile of foreign visitors to Tallinn

% of Tallinn foreign visitors, n=1461

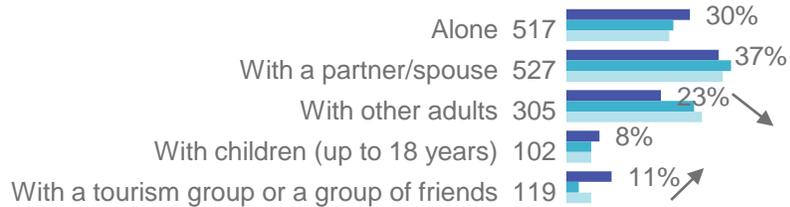
GENDER



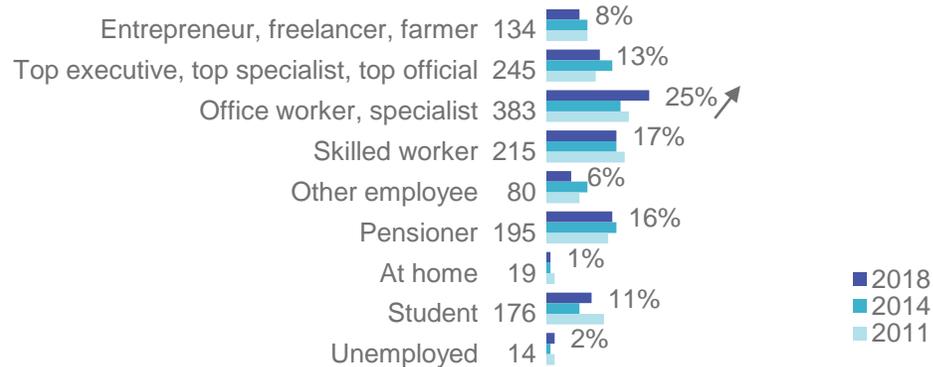
AGE



WHO ARE YOU TRAVELING WITH



STATUS



PURPOSE OF THE TRIP



PURPOSE OF THE TRIP

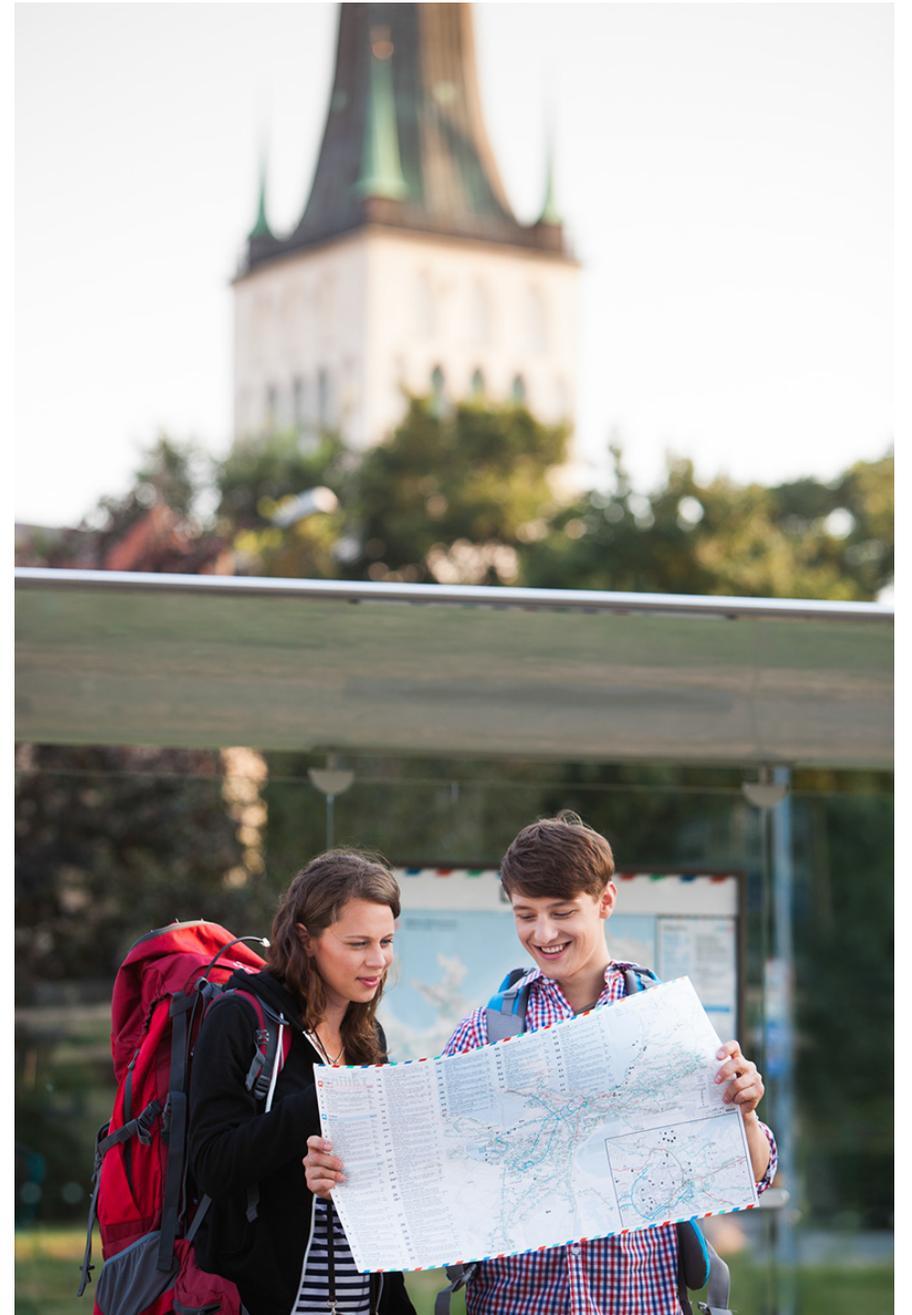


HAVE YOU VISITED TALLINN BEFORE THIS TRIP



2

Incentives to visit Tallinn



Summary (1)

Incentives to visit Tallinn

- **Nearly a third** of all the foreign visitors to Tallinn (30%) visited **Tallinn for the first time**. 70% of visitors to Tallinn are repeat visitors, for whom the capital of Estonia is mostly a frequent travel destination, 73% of them have visited Tallinn in the last 12 months.
- The main reason to choose **Tallinn as a travel destination** is easy access to Tallinn → this was mostly pointed out by our close neighbors, the Finns.
- In most cases, **the purpose of the trip to Tallinn is to have a holiday**, either a one-day (38%) or a multi-day holiday (36%), this is also the main reason for taking the trip. Compared to 2014 **the share of one-day trips as the purpose of travel has increased significantly** (25% → 38%). **Trips made for the purposes of shopping and/or for consumption of services have also increased** (12% → 19%), although total expenditure is lower than in previous years. Shopping trips were mostly cited by foreign tourists from Finland.
- For those who had several purposes when traveling to Tallinn, the **most common combination was shopping and resting**.
- **The most important influence on the decision to travel to Tallinn is an earlier visit to Tallinn** (34% - "influenced significantly"). In general ("influenced significantly" + "rather influenced"), the following factors influencing the decision were highlighted: restaurants/cafes in Tallinn (food experiences) (59%) and a favorable travel offer (57%).
- According to those who traveled to Tallinn **for holiday purposes** were mostly influenced by the opportunity to visit restaurants and cafes of Tallinn (64%) and a favorable travel offer (63%). Recommendations from friends/acquaintances (51%), heritage of different eras (43%), new travel destination (42%) and Tallinn Old Town (37%), which is a UNESCO World Heritage Site, also played a role, as did to a minor extent a recommendation of a travel agency (13%).
- As expected, for those who visited Tallinn **for work purposes** were more than average influenced than by earlier business trips, conferences or prize trips to Tallinn (50%). It can be assumed that this group includes business travelers who have closer business relations with Estonia.

Summary (2)

Incentives to visit Tallinn

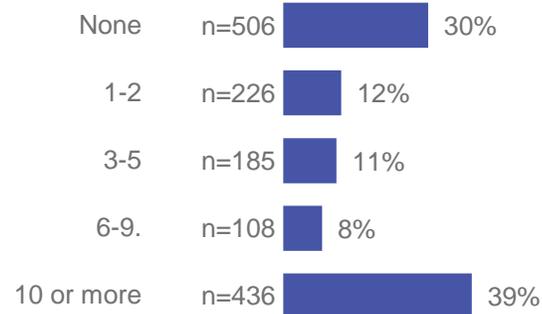
- For foreign visitors from different countries, different motivators to visit Tallinn could be observed, for example:
 - **In case of Finland the following were the higher than average influencing factors:** previous visit to Tallinn (78%), restaurants/cafes (food experiences) of Tallinn (67%), a favorable travel offer (64%), high-quality wellness services (hairdresser, spa, dentist, etc.) (30%), an earlier business trip, conference or prize trip to Tallinn (21%).
 - **In case of Sweden:** high-quality wellness services (visit to a hairdresser, spa, dentist, etc.) (41%).
 - **In case of Great Britain** recommendation of friends/acquaintances (64%), new travel destination (64%).
 - In case of **Germany:** a new destination (58%).
 - In case of **Russia:** the cultural heritage of different eras (67%), the Old Town (57%) that is on the UNESCO World Heritage List, activities/events in Tallinn (e.g., EV100 events, watching sports events, visiting fairs, etc.) (29%).
 - In case of **Latvia:** a previous trip, conference or prize trip to Tallinn (39%).
- **Travelers visiting Tallinn for the first time** acknowledged that their travel decision was influenced by the following factors: a new travel destination (86%), a recommendation from friends/acquaintances (56%), cultural heritage of different eras (54%), the Old Town (48%) that is on the UNESCO World Heritage List, recommendation of a travel agency (including *online*) (16%), recommendation of Lonely Planet (13%).

Tallinn as a travel destination

% of Tallinn foreign visitors, n=1461
 % of the corresponding target group

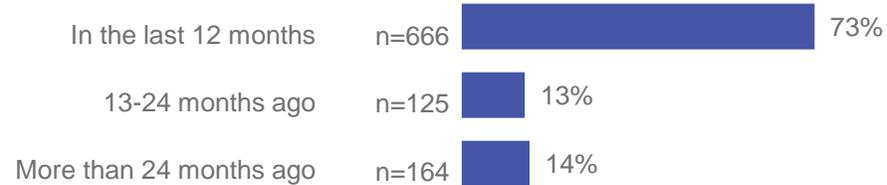
2. How many times have you visited Tallinn before this trip?

% of Tallinn foreign visitors, n=1461



3. When was the last time you visited Tallinn?

% of those, who have visited Tallinn before, n=955



4. Why did you choose Tallinn as your destination?

% of Tallinn foreign visitors, n=1461

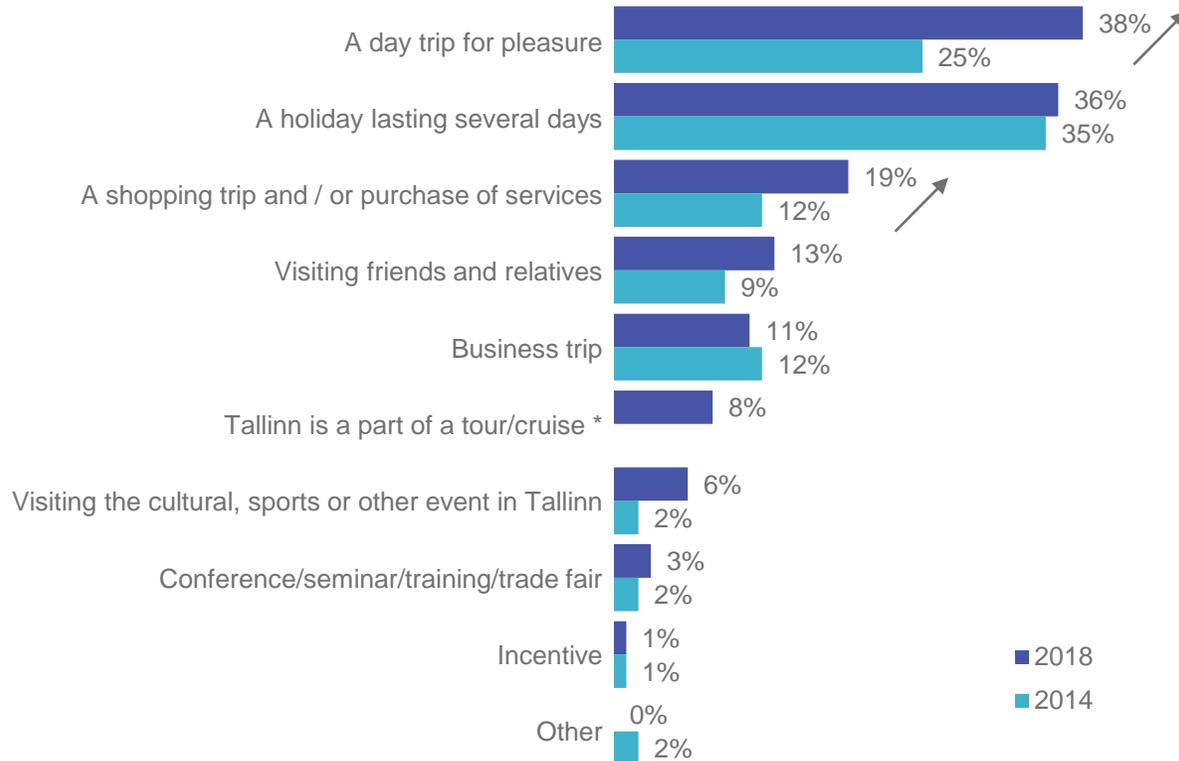


Purpose of the trip to Tallinn

% of Tallinn foreign visitors, n=1461

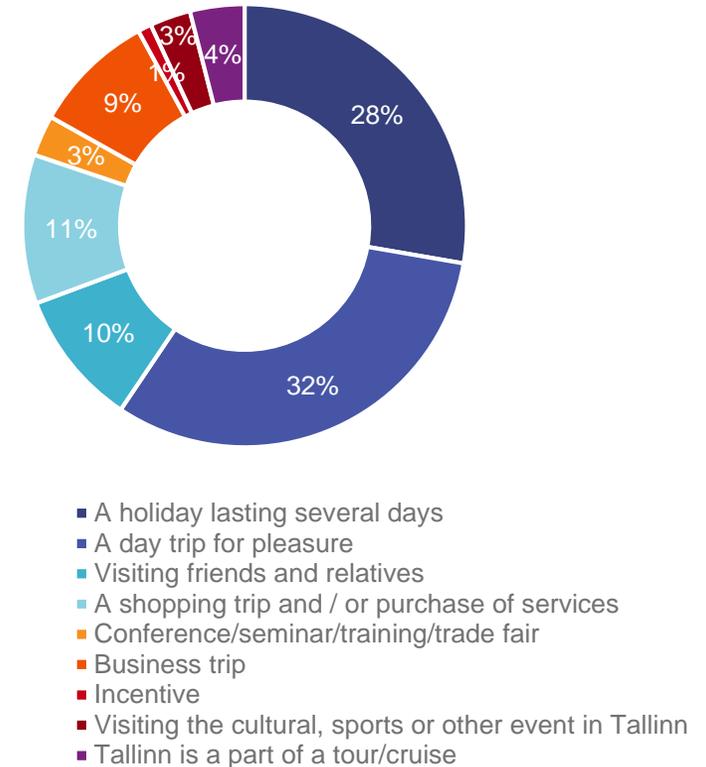
5. Which of the following responses best describes the purpose of your trip?

Multiple answers possible



5a. Which of these was the most important/main purpose?

The most important/main purpose of all respondents, single answer



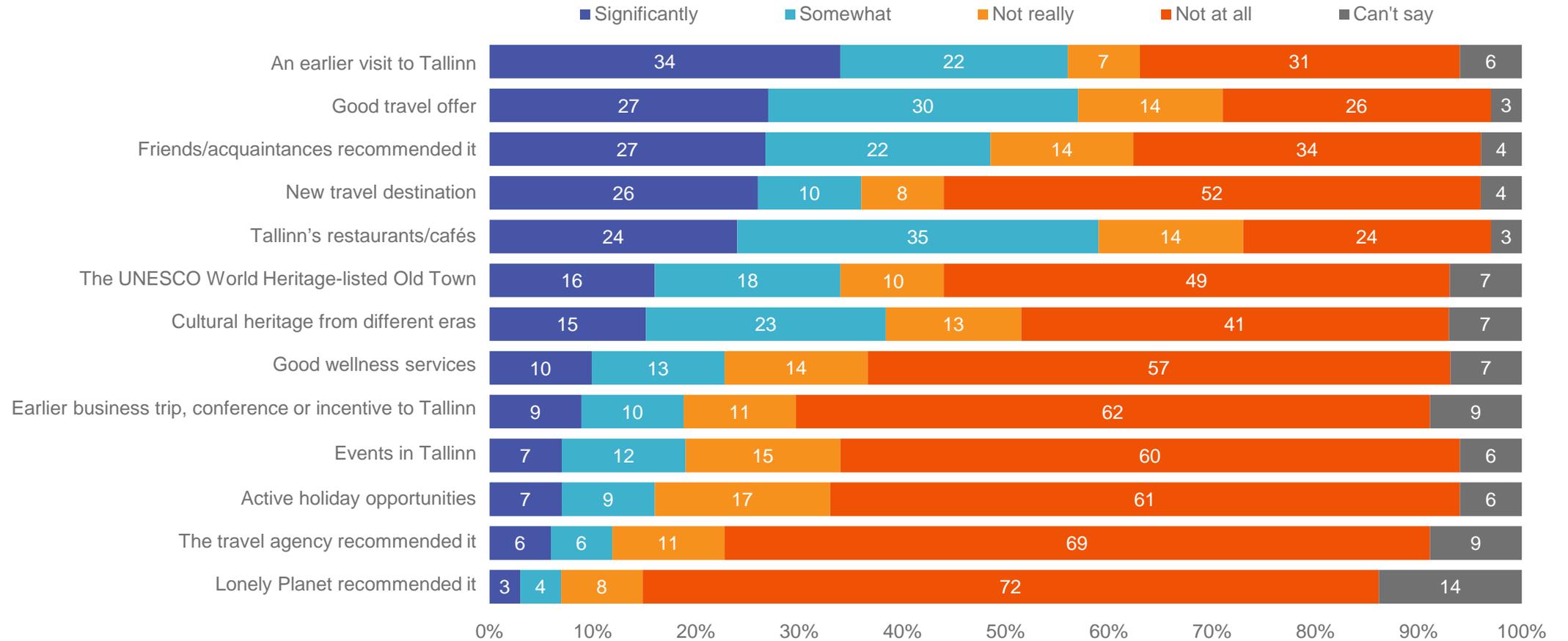
70% of respondents had one main purpose for their trip to Tallinn, 30% named several purposes.

* Was not included in 2014 survey.

Factors influencing the decision to travel to Tallinn

% of Tallinn foreign visitors, n=1461

9. What influenced your decision to visit Tallinn? Including the importance assigned to the influencer



3

Overnight stays and accommodations for foreign visitors in Tallinn



Summary

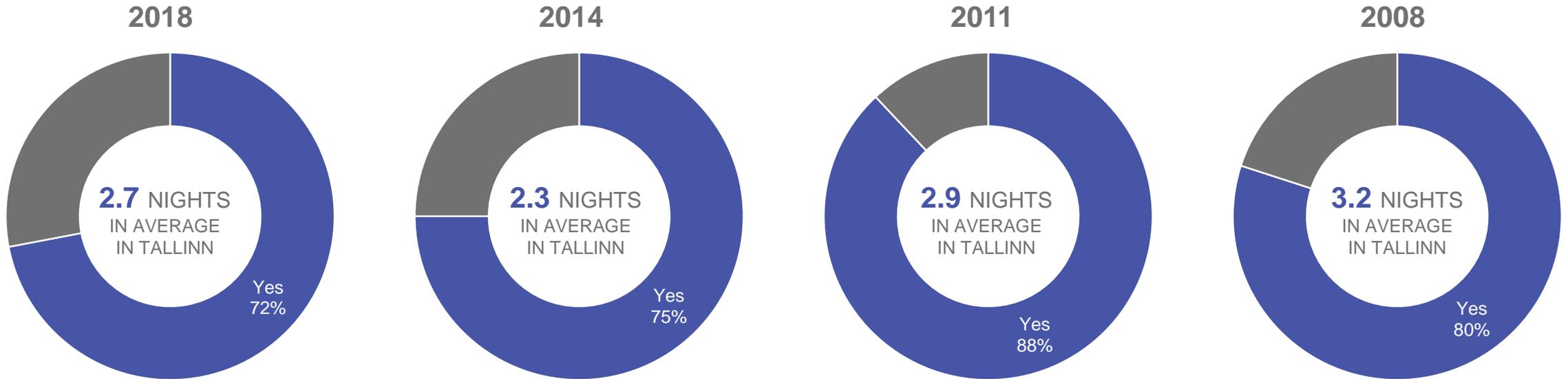
Overnight stays and accommodations for foreign visitors in Tallinn

- **Seven out of ten foreign visitors to Tallinn (72%) stay at least one night away from home**, 59% of all foreign visitors stay in Tallinn.
- **An average of 2.7 nights is spent in Tallinn**, which is somewhat more than in 2014 (2.3), but does not reach the level of ten years ago, when an average of 3.2 nights were spent in Tallinn. The visitors who come to Tallinn for family events (e.g., anniversary, wedding, etc.) or visit friends and relatives, stay in Tallinn the longest, they will spend three or four nights in Tallinn. Business trips also last longer than average *ca* three nights, and the holiday trip lasts *ca* 2.5 nights.
- More often than average, the **foreign visitors staying overnight in Tallinn are** somewhat more distant guests from Sweden, Norway, Great Britain, Germany, Russia, as well as foreign visitors from Latvia. Although there are people of all ages and statuses among people staying overnight in Tallinn, more than the average of them account for 35-44 year-olds, senior managers, leading specialists and office employees.
- More often than the average, **the purpose of the trips with overnight stays in Tallinn** is a holiday lasting for several days (55%), visiting friends and relatives (19%), business trips (13%) and attending a conference/seminar or similar event (5%).
- At least **eight out of ten foreign visitors (83%) staying overnight in Tallinn stay at a paid accommodation establishment in Tallinn; usually they stay at a hotel (63%)**. Compared to 2014, the share of overnight stays in a hotel has decreased by 72% → 63%. The decline is probably due to **Airbnb**, a world-renowned environment for guest apartments, offering alternative accommodations to hotels. Similar to 2014, the number of visitors from Finland staying overnight in hotels is higher than average (72%). One-third of visitors staying overnight in hotels and other accommodation establishments **booked accommodations online** and 74% used **Booking.com** for booking. 23% of the visitors staying overnight at the hotel used the services of a travel agent/tour operator for booking.
- The share of those **staying in guest apartments** was 7% in 2018, it has not been studied before. More often than the other, guest apartments were used by visitors from Germany and other countries (currently non-priority markets for Tallinn). Two-thirds (65%) of those who stayed in guest apartments booked their accommodation via the Internet, mostly via Airbnb (62%) and Booking.com (32%).
- **15% of the visitors staying overnight in Tallinn stay with acquaintances / relatives**, from all the visitors who stayed in Tallinn, this opportunity is used more than average by foreign visitors from Latvia.

Staying overnight in Tallinn

% of Tallinn foreign visitors

1. Do you spend at least one night away from your home?
6. How many nights did you spend in Tallinn during your trip?

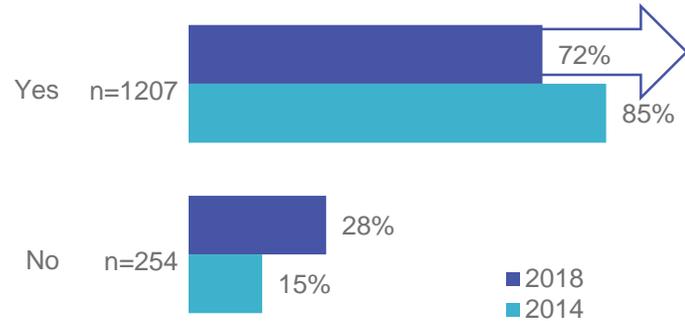


Duration of visit on different types of trips

% of Tallinn foreign visitors, n=1461

% of Tallinn foreign visitors, who spent in Tallinn up to 14 nights, n = 1059

1. Do you spend at least one night away from your home?



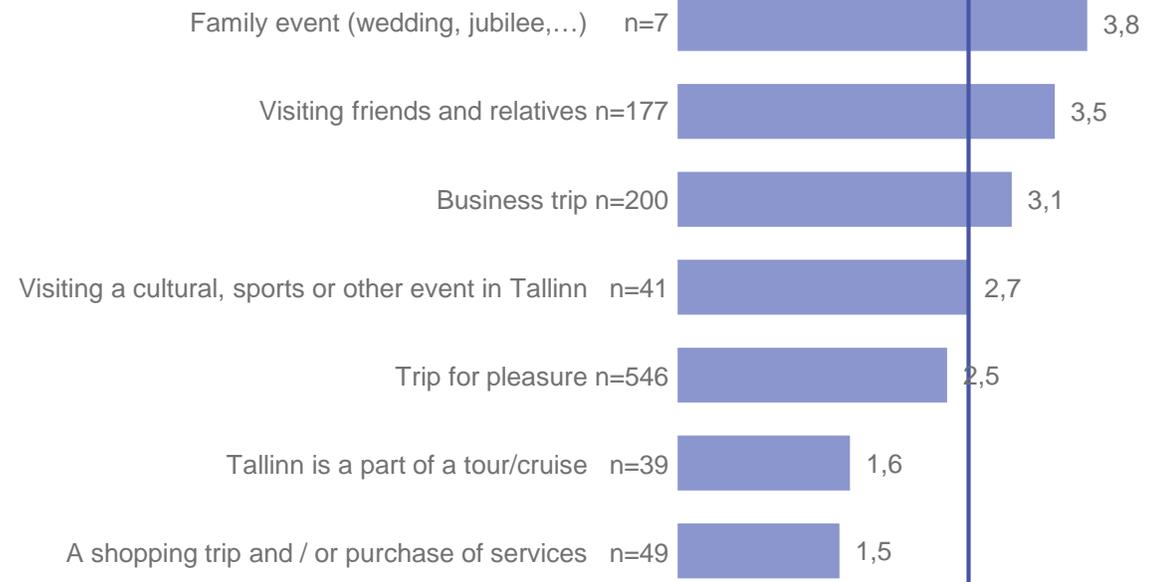
Type of visit to Tallinn:



6. How many nights did you spend in Tallinn during your trip?

Average number of days spent in Tallinn 1059 2,7

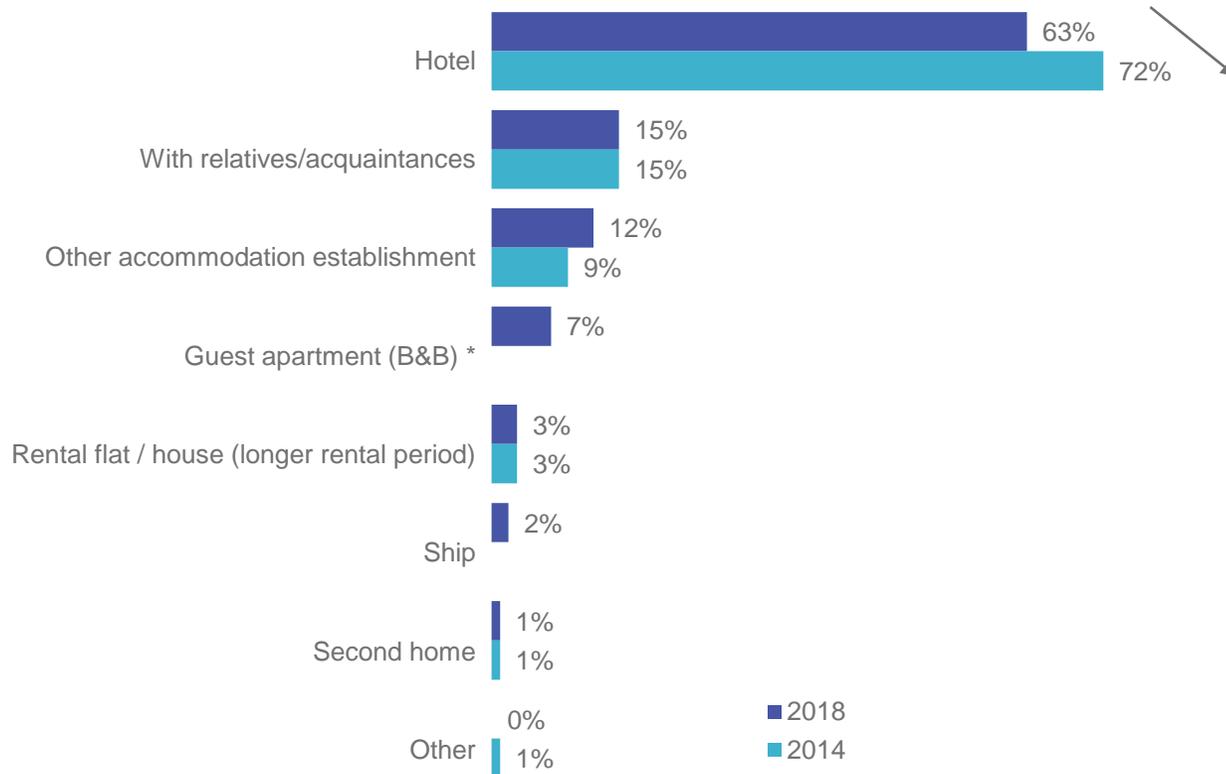
5a. Which of these was the most important/main purpose?



Staying overnight in Tallinn

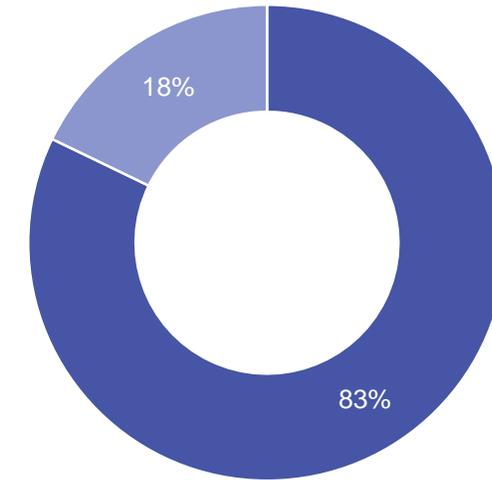
% of Tallinn foreign visitors, who spent in Tallinn at least one night

7. Where did you stay the night in Tallinn?



* Was not included in 2014 survey.

■ paid accommodation ■ free accommodation



- Average number of nights spent in Tallinn **2.7** nights (those who stayed in Tallinn for up to 14 nights).

4 Information sources for travel to Tallinn



Summary

Information sources for travel to Tallinn

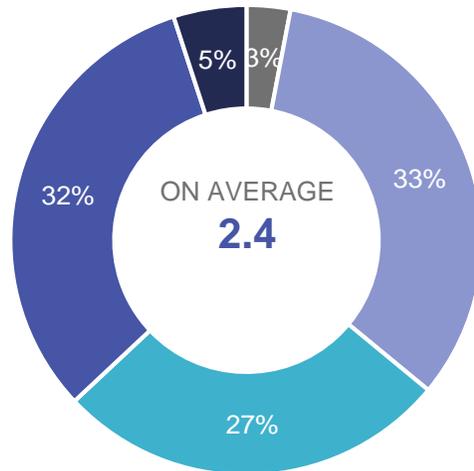
- On average, the information and inspiration **before the trip was obtained from 2.4 sources**. More active seekers of information sources are younger, 18–34 year olds (2.8), their status being pupils and students (2.9), holiday travelers (2.8), and those who came to Tallinn for a cultural / sporting event or event taking place here (3.0). The average number of information sources is also higher for social media users (4.1).
- **The biggest source of inspiration before a trip to Tallinn** continues to be a **previous visit to Tallinn (59%)**, which was mentioned more frequently than average by foreign visitors from Finland (85%) and Latvia (77%) who have also visited Tallinn the most (repeat visitors from Finland 97% and repeat visitors from Latvia 92%).
- **Recommendations from friends/acquaintances** before the trip, are the inspiration for 45 percent, there have been no major changes in four years. Recommendations made by friends/acquaintances inspire more than average visitors from other countries (not so priority countries for Tallinn at the moment). However, **visiting travel websites and travel forums (21%→26%)** and **reading articles in magazines and newspapers (10%→16%)** has increased - visitors from Germany and other countries have mentioned the latter more than the average.
- The use of **social media** 9%→23% (including Facebook 15%, YouTube 6%, Instagram 6%, Twitter 1% and other channels 3%) as sources of inspiration before the trip has grown - Latvians (36%) and foreign visitors from other countries (32%) mentioned it more frequently than the average.
- **The most influential sources of information and inspiration before traveling** is still personal **earlier experience (64% - main influence)** and **recommendation of friends / acquaintances (57% - main influence)**.
- Compared to pre-trip information sources, **somewhat less inspiration and information sources are sought during the trip - an average of 2.2**. Once arrived at the destination, the younger, up to 44 years old (2.5) visitors are more active than others; pupils/students (2,5), visitors from Great Britain (2,8) and Germany (2,7) who are more often the first time visitors to Tallinn. Here, too, social media users are more active information seekers than others (3.6).
- **During the trip** it is preferred to ask **recommendations from local people**, either from visitor's own acquaintances and friends (41% in 2018 and 36% in 2014) or from other local residents (34% in 2018 and 15% in 2014). In both cases, the proportions have increased significantly compared to 2014.
- Just under half (45%) of foreign visitors **shared or planned to share their travel impressions on social media channels**. Those who did share or wanted to do so chose Facebook (69%) or Instagram (49%) for that purpose. Women, younger people (18–34 years), unskilled workers and pupils/students are more active than average in sharing their travel impressions in social media. Travel impressions are shared more than average by travelers from other countries; those who are on holiday, and more than average, those who have come to Tallinn for a cultural/sporting event, but also those for whom a trip to Tallinn is a prize.

The number of used information sources before the trip and during the trip

% of Tallinn foreign visitors, n=1461

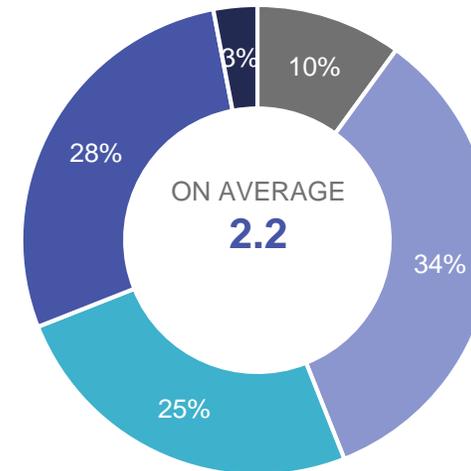
10. Number of sources, from which one obtained information about Tallinn **before the trip**

■ None of the above ■ 1 ■ 2 ■ 3 to 5 ■ 6 to 14



11. Number of sources, from which one obtained information about Tallinn **during the trip**

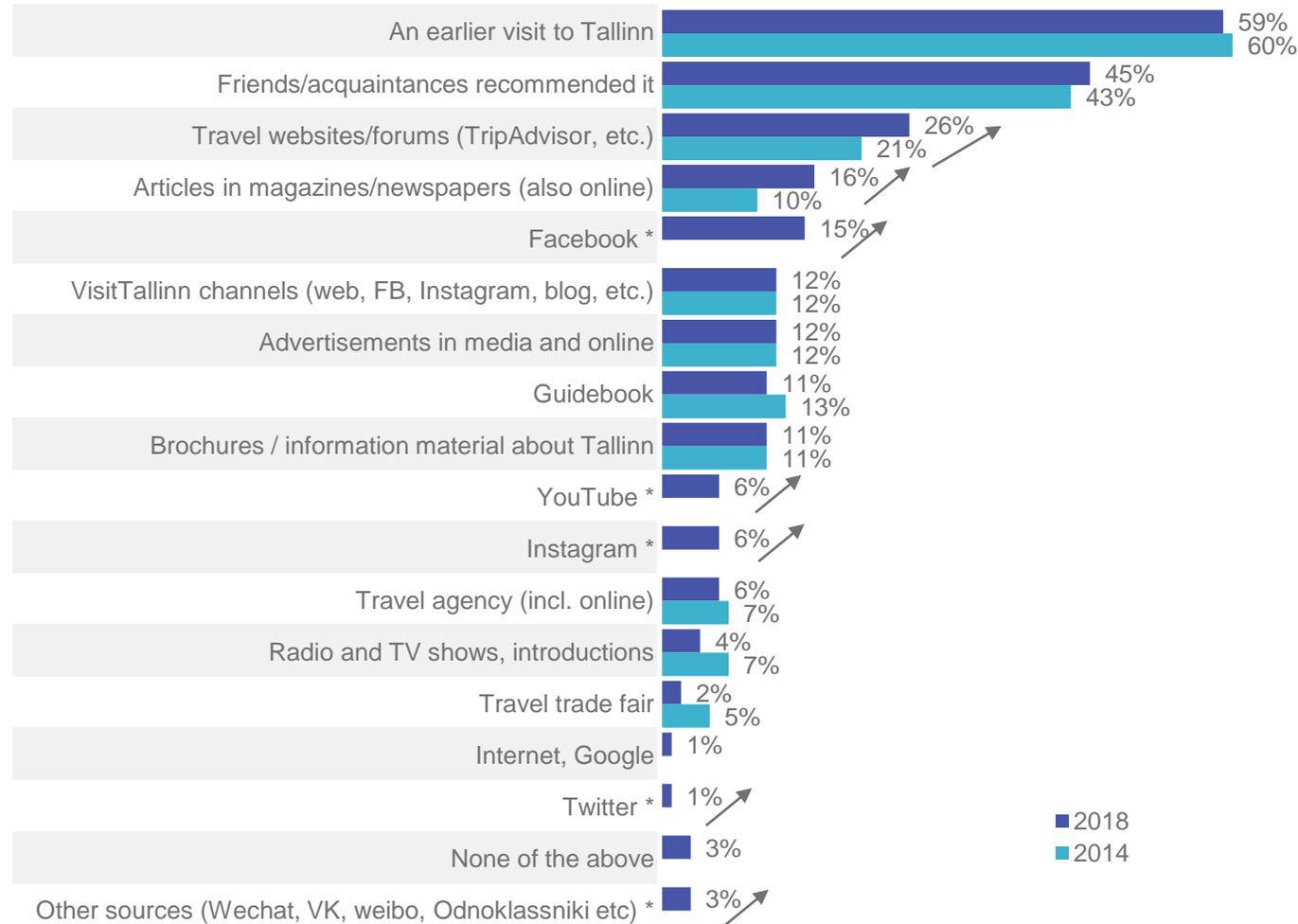
■ Didn't need any information ■ 1 ■ 2 ■ 3 to 5 ■ 6 to 14



Sources of information and inspiration before a trip to Tallinn

% of Tallinn foreign visitors, n=1461

10. From which of the following sources did you get information and inspiration about Tallinn before your trip?



Compared to 2014, the use of social media as an information source has increased - 9%→23% (Facebook, Instagram, Twitter and other channels).

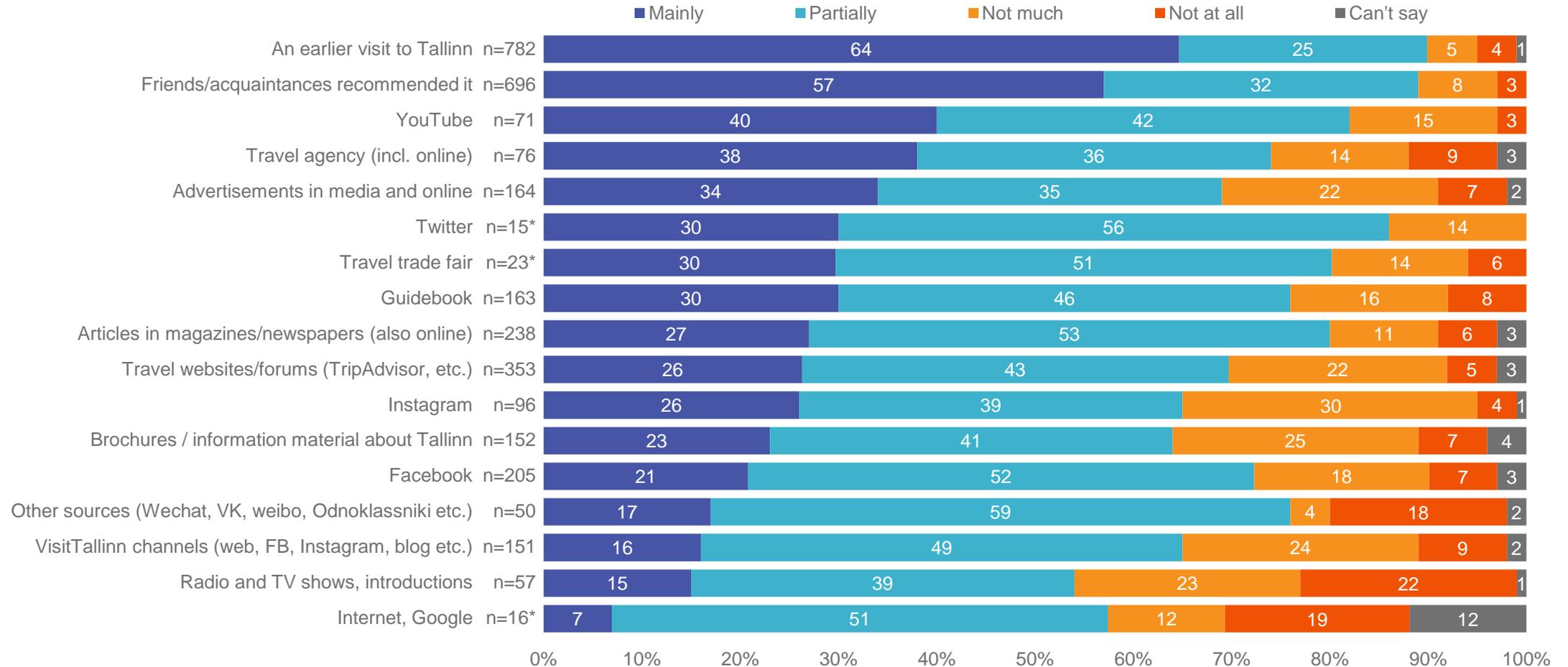
* Was not included in 2014 survey.

In 2014 all channels of social media were merged together under one answer, „Social media“ - 9%.

Sources of information and inspiration before a trip to Tallinn and their influence on travel destination

% of foreign visitors to Tallinn who have received information and inspiration about Tallinn from sources provided before the trip

10. From which of the following sources did you find information and inspiration about Tallinn before your trip?
Please indicate how much each of the following factors influenced your decision to visit Tallinn.

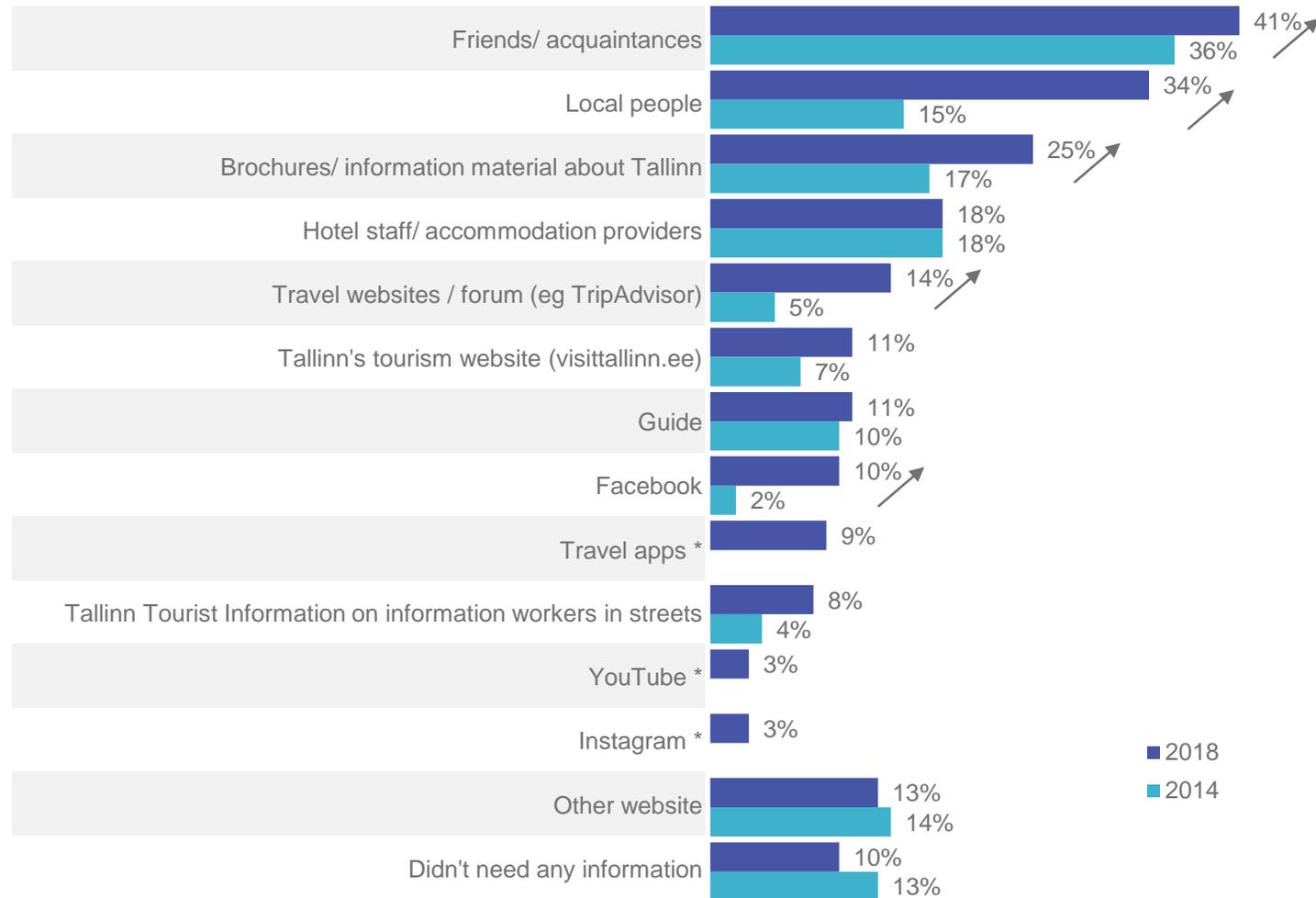


* The number of respondents is too small to make generalizations for the general population

Information sources during the stay in Tallinn

% of Tallinn foreign visitors, n=1461

11. From which of these sources did you get information during your stay in Tallinn?



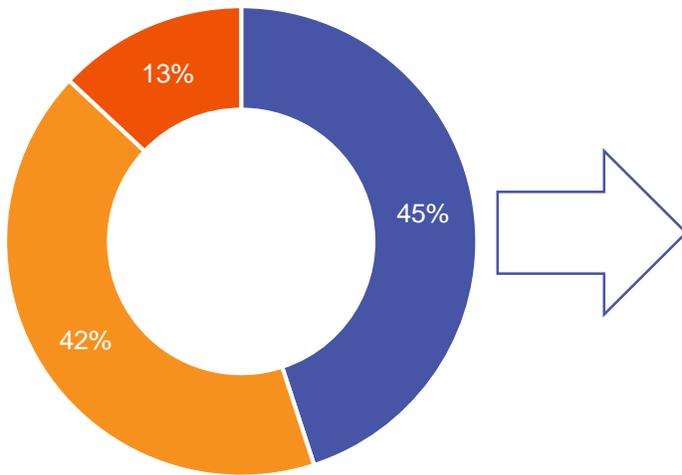
* Was not included in 2014 survey.

Sharing travel impressions of Tallinn on social media channels

% of Tallinn foreign visitors, n=1461

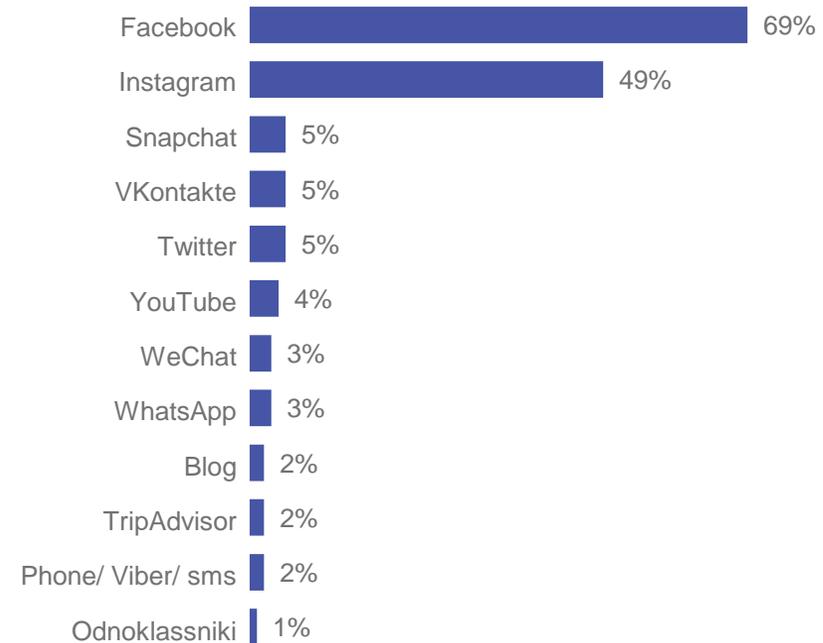
12. Did you share your travel impressions on social media during your visit to Tallinn or do you intend to do that after your trip?

■ Yes ■ No ■ I don't use social media ■ Can't say



13. Please specify the social media channel in which you shared/plan to share your impressions.

% of those, who shared or intended to share their travel impressions on social media, n=658



5

Visit to Tallinn



Summary (1)

Visit to Tallinn

- Most (60%) of the foreign visitors of Tallinn **described Tallinn with positive emotions**, such as wonderful, beautiful, nice, charming, etc. 30% brought out the hot-spot of Tallinn - a well-preserved medieval old town. The compactness and comfort of Tallinn (26%) and people's hospitality (25%) were also mentioned in a positive way.
- **Top 3 activities** in Tallinn continue to be a **walk in town** (79%) **visiting cafes/restaurants** (78%) and **shopping** (66%). If compared to the year 2014 more and more people, emphasize taking walks (74%→79%) and visiting cafes/restaurants (70%→78%) as the activities performed in Tallinn then shopping as a whole has fallen (72%→66%).
 - More than the average among those who have taken a **walk in Tallinn** are first-time visitors, 25-34 year-olds, those who traveled with a partner/spouse or other adults, more than average foreign visitors arriving from the UK, Germany and Russia. More than average, among the walkers, were those who came to Tallinn for a multiple day trip, who came to visit a cultural or sporting event in Tallinn or for whom Tallinn is one city from a tour/cruise.
 - More than average of those who **went to cafes/restaurants are** over 55-year-olds traveling with a partner/spouse or other adults. In terms of their social status, office employees and pensioners are more represented here. Mostly, they are on a multiple day holiday trip or a trip connected to shopping/consumption of services.
 - Among those who came for **shopping**, more than average were women, 55-64 year olds, skilled workers, other workers and the unemployed. More than average, foreign visitors from Finland and Russia have come for shopping or using services. The purpose of the trip for them is more frequently a one-day holiday or shopping trip. Here, too, these are more frequently the visitors, for whom coming to Tallinn is not the first time experience.
- **On average 3.7 activities were taken in Tallinn**, which has not changed in four years. More active than average visitors to Tallinn are first-time visitors (4.2), men (3.8 activities), 35-44 year-olds (4.0), travelers with a spouse/partner or other adults (3.8–3.9), office employees (4.0). Visitors of the city from the United Kingdom (4.8), Germany (4.6) and Norway (4.4) are also more active than average. Among the more active tourists, there are more often than average those who came on a multiple day holiday trip (4.5) or attended conferences/seminars (4.5).
- Thanks to its compactness, Tallinn also makes it possible to reach many destinations **by walking, which is the most used mode of movement** and has increased by 10 percentage points over the last four years (78%→88%). As for the modes of movement, **taxi** which was used by almost a third of visitors of Tallinn ranks the second. Since 2014 the **role of public transport has** significantly increased (18% in 2014) vs. 26% in 2018). At the same time, 3% of users of public transport have raised problems related to the use of public transport. Compared to the past, the share of the use of cars has fallen (20% →12%).
 - Among public transport users, there are more than average of those travelling alone, visitors from Great Britain, Germany, Latvia and other countries. The purpose of the trip for public transport users is more often than the average a multiple day trip, visiting friends and relatives, or Tallinn is part of a tour. Public transport is also frequently used by first-time visitors to Tallinn.

Summary (2)

Visit to Tallinn

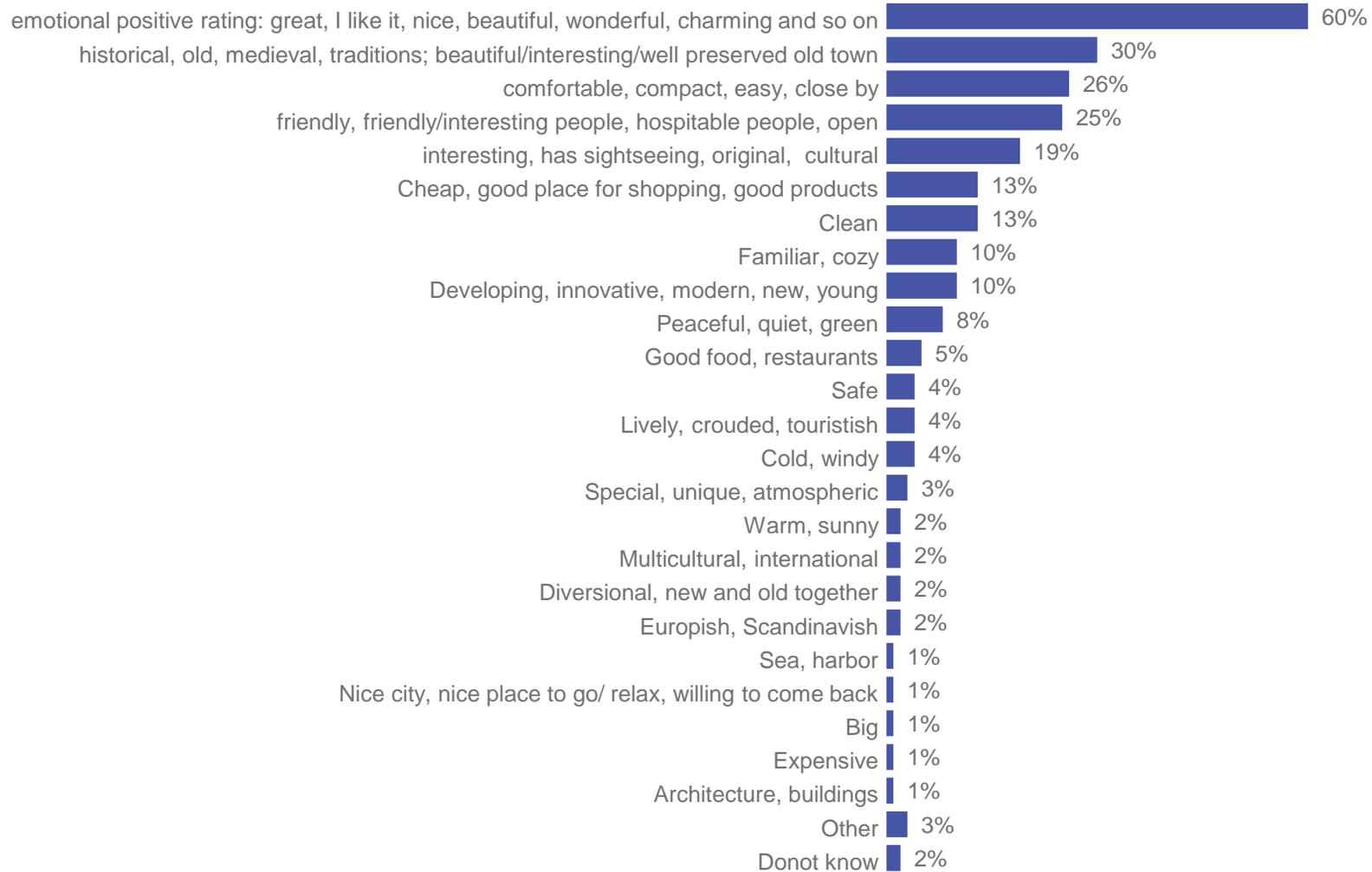
- **One third of foreign visitors did not use any city maps** for moving around in the city, **38% used *online* city map** and **33% used *traditional paper card*** (estimated at 1,084,600 foreign visitors). The use of all kinds of city maps is as expected more common for those visitors who are in Tallinn for the first time - 90% of them used a city map to find their way around in the city. Different *online* and *offline* apps (21%) *offline* city map (12%) and city maps on the streets (7%) are more than average preferred by first-time visitors.
- ***Online-city maps*** are more than average preferred by those who used a taxi, public transport, car or ride sharing services during their latest trip to Tallinn.
- **City maps on paper** are more than average preferred among walkers and private bus users.
- The use of **apps** is more preferred by those who recently traveled around Tallinn using a ride sharing service or riding a bicycle.

- **Almost a third of all foreign visitors know the Tallinn Card (31%)**, awareness is slightly higher among first-time visitors - 35% know it or have heard of it. 33% of those visiting museums and attractions, not much more than average, know about Tallinn Card. Mostly, information about Tallinn Card is found before the trip (82%).
 - Women, 55-64 years olds, office employees/specialists and pensioners are more knowledgeable about Tallinn Card. More than average, it is the Finns who have heard about Tallinn Card; those for whom the objective of the trip was a multiple day holidays, and those who have come to Tallinn for a shopping trip or for consumption of services.
- However, using the Tallinn Card is relatively low, only 12% of those who are aware of the Tallinn Card have actually used it. More than average among the people who use the card are younger (18-24 year olds) and 55-64 year olds, by social status workers.

Words characterizing Tallinn

% of Tallinn foreign visitors, n=1461

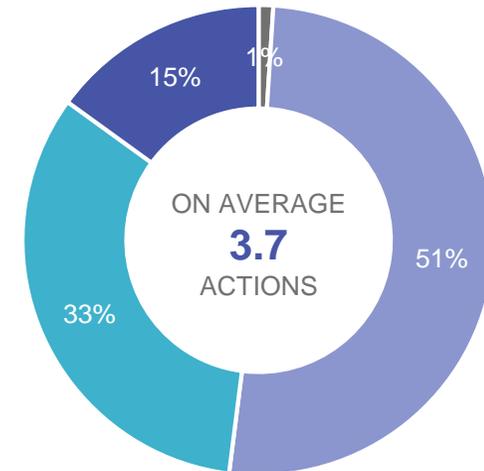
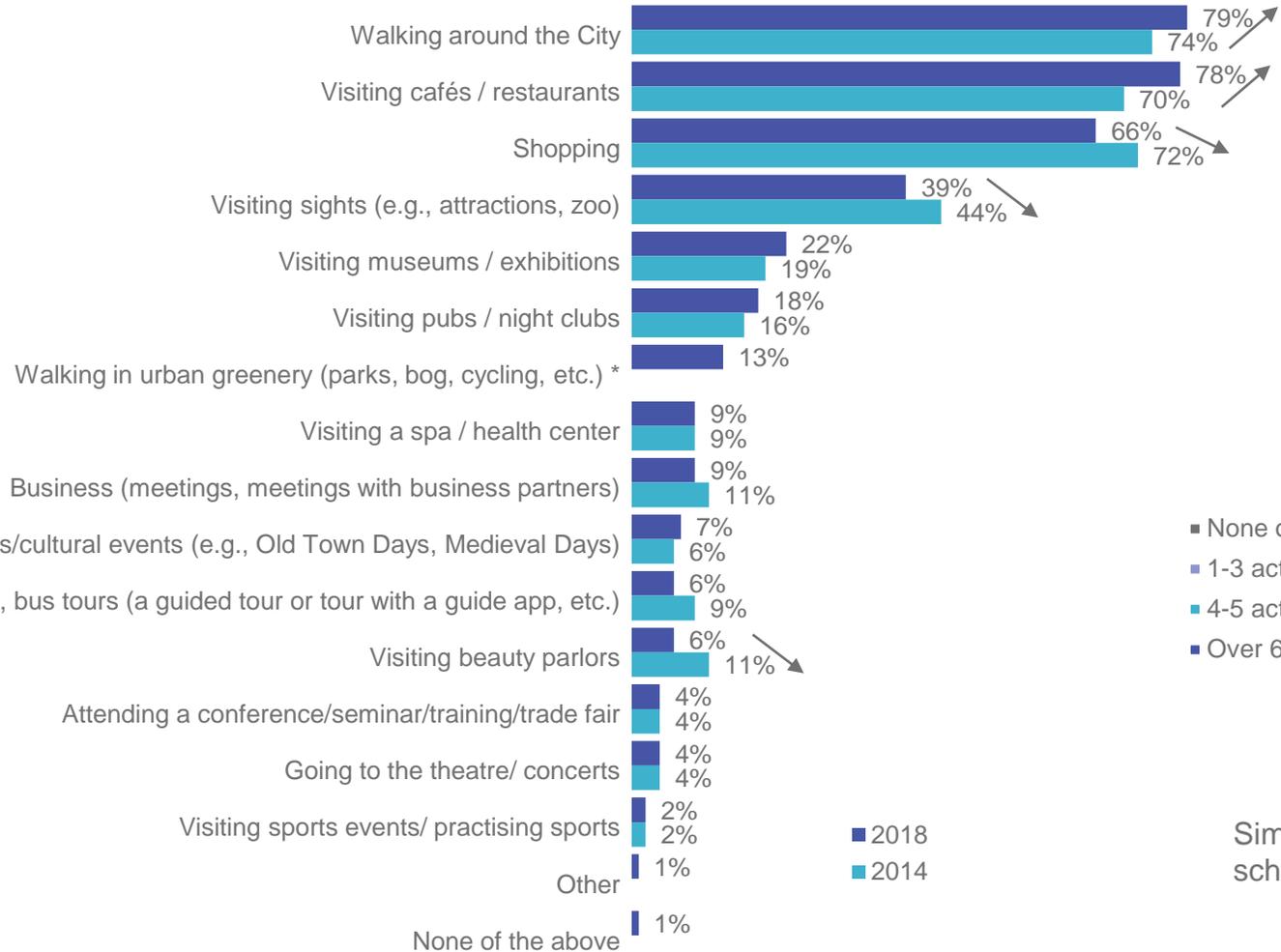
26. Please describe Tallinn in three words.



Activities in Tallinn

% of Tallinn foreign visitors, n=1461

15. Which of the following did you do in Tallinn?



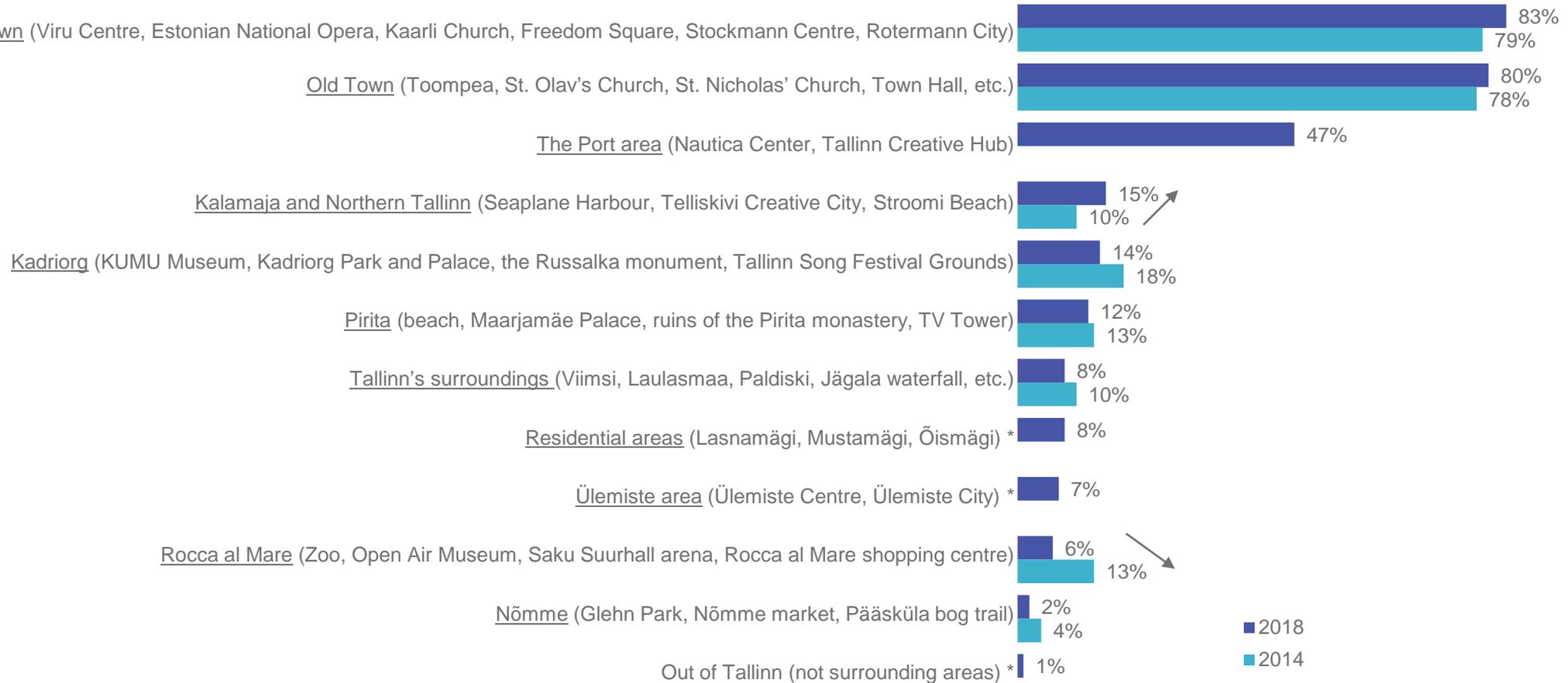
Similarly to 2014, an average of 3-4 activities are scheduled in Tallinn.

* Was not included in 2014 survey.

Areas visited in Tallinn

% of Tallinn visitors, n=1461

14. Which regions of Tallinn did you visit during your trip?



* Was not included in 2014 survey.

Activities and areas visited in Tallinn

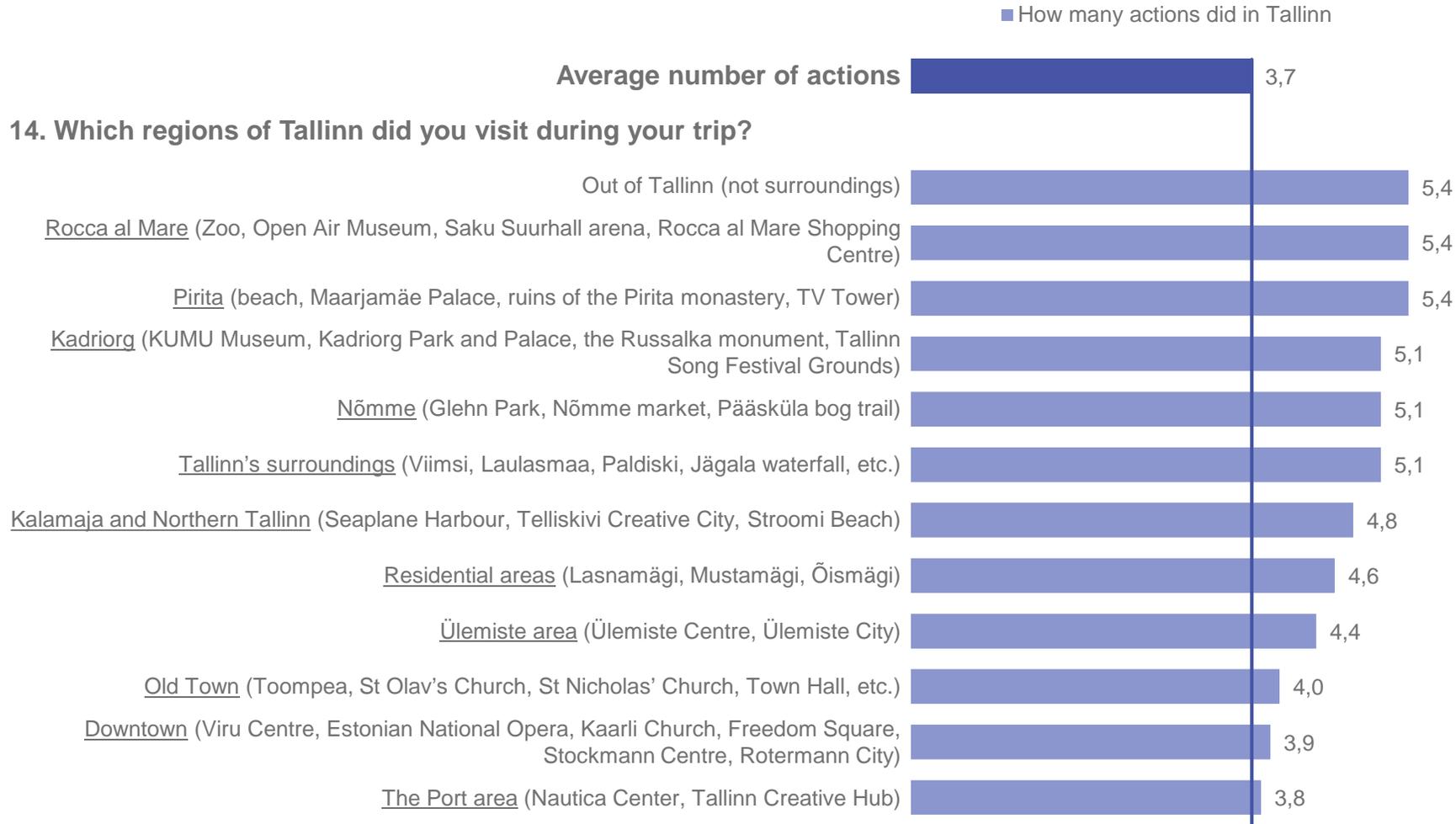
15. Which of the following did you do in Tallinn?

14. Which regions of Tallinn did you visit during your trip?

	Total	Shopping	Visiting sights	Visiting museums / exhibitions	Going to the theatre/ concerts	Attending festivals / cultural events	Walking around the City	Going on an excursion, including bus tours	Walking in urban greenery	Visiting cafés / restaurants	Visiting pubs / night clubs	Visiting sports events/ practising sports	Visiting a spa / health centre	Visiting beauty parlors	Attending a conference/ seminar/ training/ trade fair	Business
Old Town	80%	79%	97%	97%	87%	99%	89%	100%	99%	83%	89%	92%	86%	78%	91%	64%
Downtown	83%	85%	85%	85%	97%	91%	87%	96%	86%	86%	93%	97%	87%	97%	98%	73%
Kadriorg	14%	13%	25%	42%	28%	30%	16%	42%	36%	16%	23%	35%	18%	15%	17%	6%
Pirita	12%	10%	22%	27%	31%	33%	13%	42%	28%	13%	21%	21%	23%	23%	29%	20%
Rocca al Mare	6%	7%	10%	9%	34%	15%	7%	11%	8%	7%	11%	17%	19%	20%	12%	12%
Kalamaja and Northern Tallinn	15%	16%	22%	28%	41%	41%	17%	29%	34%	17%	26%	33%	17%	28%	14%	12%
Nõmme	2%	2%	3%	3%	12%	8%	2%	0%	5%	2%	3%	5%	1%	4%	4%	1%
The Port area	47%	51%	44%	46%	68%	56%	48%	41%	54%	48%	52%	50%	63%	59%	56%	35%
Ülemiste area	7%	8%	8%	7%	22%	9%	7%	7%	8%	7%	9%	22%	9%	19%	15%	19%
Residential areas	8%	6%	10%	12%	23%	19%	7%	16%	14%	8%	18%	34%	2%	26%	14%	13%
Tallinn's surroundings	8%	8%	12%	15%	23%	19%	8%	16%	16%	9%	18%	16%	27%	7%	19%	18%
Out of Tallinn	1%	1%	1%	1%	2%	0%	1%	1%	1%	1%	1%	1%	1%	0%	0%	0%

Activities and areas visited in Tallinn - average

Average ratings

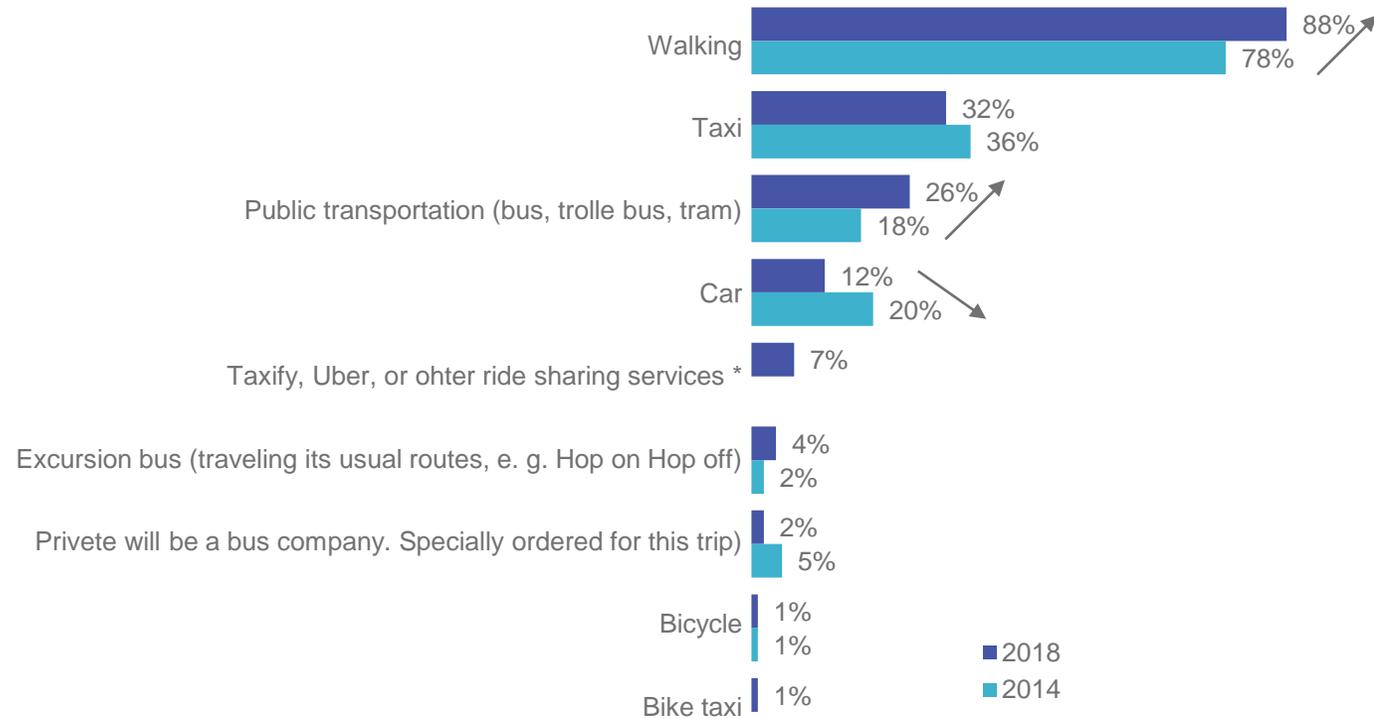


More active foreign visitors to Tallinn reach areas further from the city center.

Means of transportation used when moving in Tallinn

% of Tallinn foreign visitors, n=1461

16. Which means of transportation did you use to move around in Tallinn?

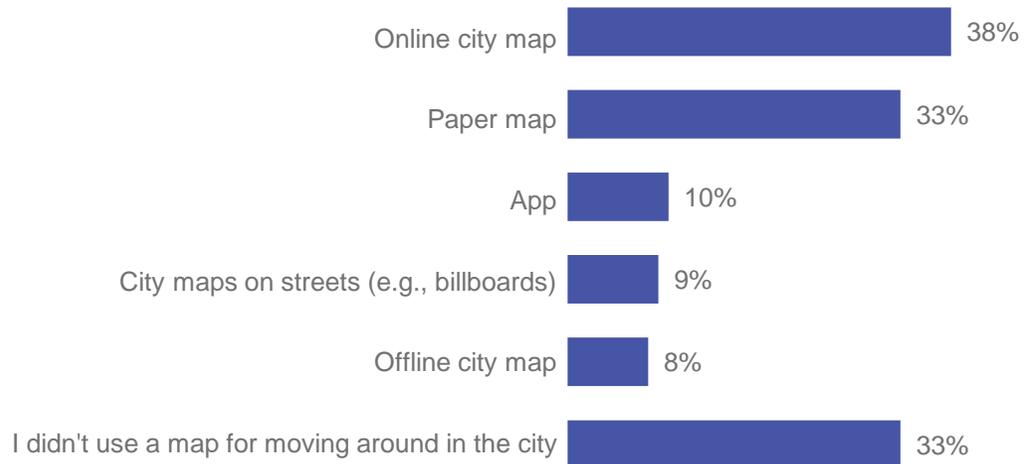


* Was not included in 2014 survey.

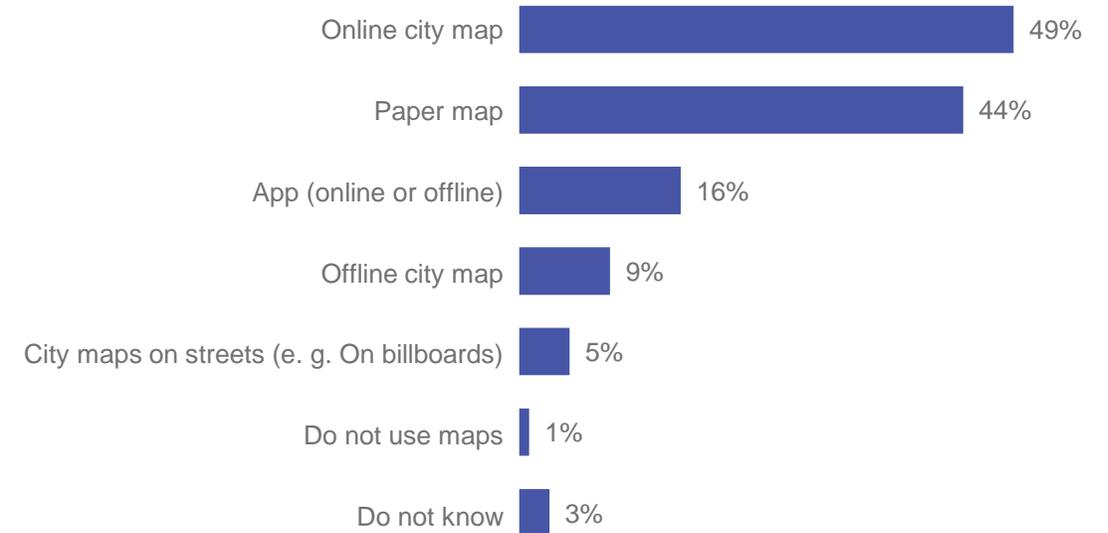
Using city maps in Tallinn

% of Tallinn foreign visitors, n=1461

17. Which Tallinn city maps did you use for moving around the city?



18. Which one do you prefer for moving around in the city?



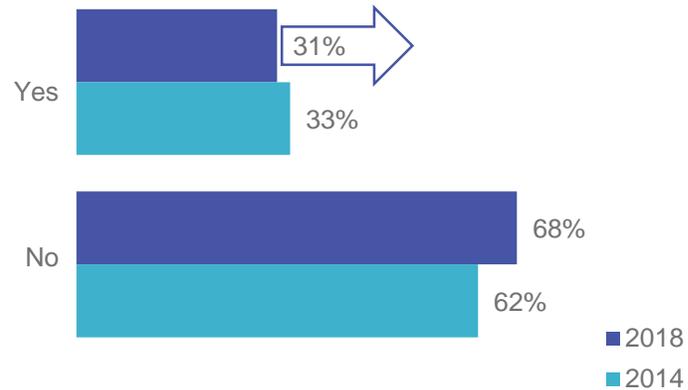
It was estimated that in 2018 a paper city map was used by ca 1,084,600 foreign visitors to Tallinn.

Awareness of Tallinn Card



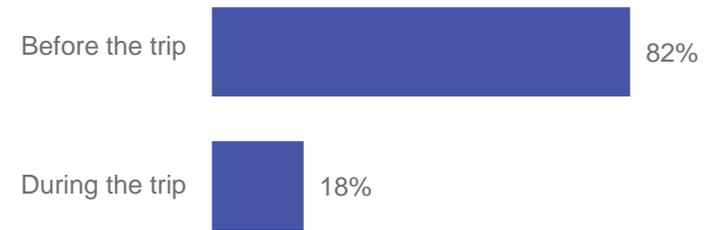
19. Do you know or have you heard anything about the Tallinn Card?

% of Tallinn foreign visitors, n=1461



20. Did you hear about the Tallinn Card before or during your trip?

% of those, who know about the Tallinn Card, n=417

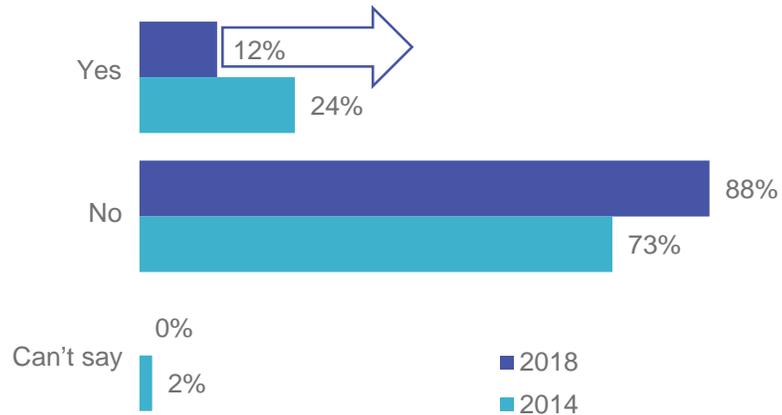


- Out of first-time visitors of Tallinn, **35%** have heard about Tallinn Card.
- **33%** of the visitors to museums and attractions have heard of Tallinn Card.

Use of Tallinn Card

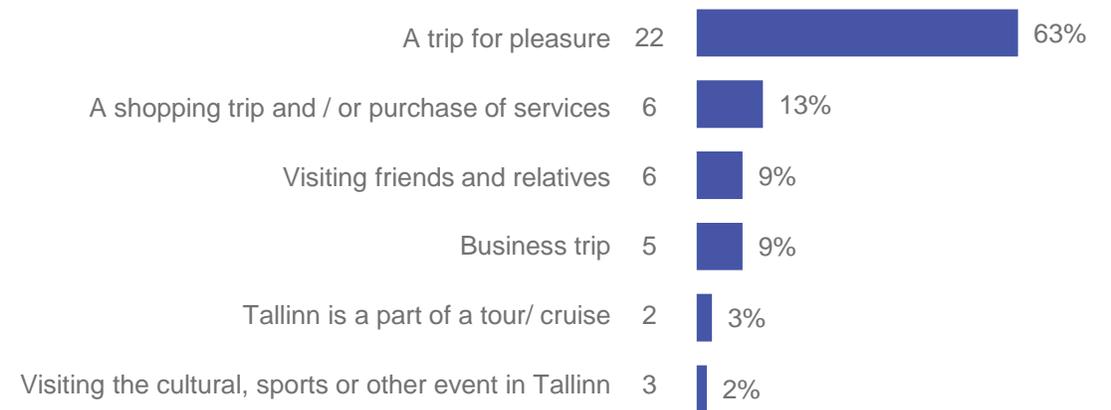
21. Have you used the Tallinn Card?

% of those, who know about the Tallinn Card, n=417



5a. Which of these was the most important/main purpose?

% of those, who know about the Tallinn Card, n=417



- Those who have used the Tallinn Card **70%** stay at least one night away from home.
- Tallinn Card users spent on average **2.4 nights** in Tallinn (average 2.7 nights for all visitors).
- The rating of Tallinn Card by the users on the 10-point scale is on average **8.7**.
- **8%** of those first-time visitors to Tallinn who are aware of the Tallinn Card have used it.
- **13%** of the visitors to museums and attractions who are aware of the Tallinn Card have used Tallinn Card.

6

Reputation and travel impressions of Tallinn



Summary (1)

Reputation and travel impressions of Tallinn

- Giving a maximum rating to the **overall impression of a trip to Tallinn is an increasing trend**: Ten years ago, in 2008, the overall impression of a trip to Tallinn was assessed with 10 points by 19% of all foreign visitors, whereas in 2018, 34% of tourists gave the highest rating to Tallinn. The average rating for the overall impression of Tallinn this time is 8.7. More positive than others (rating 10 or 9 points) are those traveling alone, top managers, leading specialists, tourists from Russia, and those who came for a multiple day trip.
- Ratings for the reputation components and service of Tallinn are generally fairly high; on a four point scale, all the ratings were above 3 points. However, ratings have somewhat declined compared to 2014.
- Foreign visitors to Tallinn had an opportunity to highlight the most positive thing about Tallinn, but also the area that needed improvement. Most praise was given to **Tallinn restaurants, good food and beer** (16%), 11% praised the Old Town and Kadriorg, 11% gave a more general positive emotional comment, and 10% praised the local people. The number of negative comments given was significantly smaller than the number of positive comments - only 39% found that something should be improved in Tallinn. Various aspects of service were mentioned the most (11%).
- **Seven out of ten foreign visitors found that there was a completely acceptable number of other tourists in the streets of Tallinn**, and here there were no major differences between the low season or the high season of tourism, except in the high season, there were a little more than average of those who found that there might be fewer tourists.
- **According to the majority (64%), the trip to Tallinn was in full compliance with expectations and one third assessed that the expectations were exceeded or significantly exceeded.** Most of all, Tallinn was able to exceed the expectations of first-time visitors, younger visitors (18–34 years), visitors traveling alone, top managers/leading specialists and pupils/students, as well as expectations of the visitors from the growing markets, UK, Germany and other countries (currently not that much priority markets for Tallinn).
- Like 2014, **nine out of ten foreign visitors believe that they will visit Tallinn again in the next five years.** At the same time, compared to 2014, there has been a significant decrease in the proportion of those who are sure that they will visit Tallinn again (71% → 63%), the figure being now at the level of 2011 (62% in 2011). Compared to repeat visitors, first-time visitors to Tallinn are not so sure about revisiting Tallinn - only a quarter (25%) are sure to visit Tallinn again in the coming years, and a fifth (21%) say they will probably not return to Tallinn during this time. At the same time, the reason for uncertainty regarding visiting the city is not the fact that the first-time visitors did not like the city (59% of first-time visitors stated that Tallinn exceeded their expectations), but rather the fact that first-time visitors come from more distant countries: Norway, UK, Germany and other countries, including Asia, North America, South America, Australia, and so on.

Summary (2)

Reputation and travel impressions of Tallinn

- **Finns were more certain than the average (84%) about re-visiting Tallinn.**
- **In case the visit to Tallinn should come true**, the visitors hope to walk around more and discover new places in Tallinn (14%), visit the zoo, museums and exhibitions (12%), but also reach outside the city center or even out of Tallinn (11%).
- **In most cases, foreign tourists visiting Tallinn would also recommend visiting Tallinn to their friends and acquaintances**, the average score in the 10-point system is 8.9, and 10 and 9 points accounted for 67% of all respondents. Tallinn as a travel destination would be recommended more than average by 45 -55-year-old, those traveling with partner or spouse, entrepreneurs/freelancers/farmers, visitors from Russia, those on a one-day holiday and those on a prize trip.
- In 2018, the total spending of foreign visitors (including accommodation) per person per day was 89 euros, which is considerably less than before (132 € in 2014 and 164 € in 2011). Although total spending has fallen for foreign visitors in all countries under review, the biggest drop has been in the spending of visitors from Russia. While in 2014, an average Russian tourist spent 271 euros and in 2011 a total of 384 euros, in 2018 the Russians spent only 85 € on average per person per day. Expenditures made by Finns have also fallen - when in 2014, a Finn would spend 128 €, then four years later, they would spend only 104 €.
- Total spending is higher than average for repeat visitors and for foreign visitors visiting Tallinn during the high season. Men, visitors between the ages of 35 and 54, and 65 and older, those traveling alone, senior executives, specialists, pensioners, and people not working spend more than the others. As for countries, visitors from Finland spend more than average. In case of larger expenditures, the trip is more often a shopping trip or a trip taken for the purpose of consuming services.
- It is estimated that in 2018, foreign visitors (except cruise passengers) spent EUR 770-833 million in Tallinn, whereas cruise passengers spent EUR 19-23 million in our capital.

Assessment of the general impression left by Tallinn

% of Tallinn foreign visitors, n=1461

22. How would you evaluate the general impression of your stay in Tallinn on a scale of 10, where 1 is the lowest and 10 is the highest score?

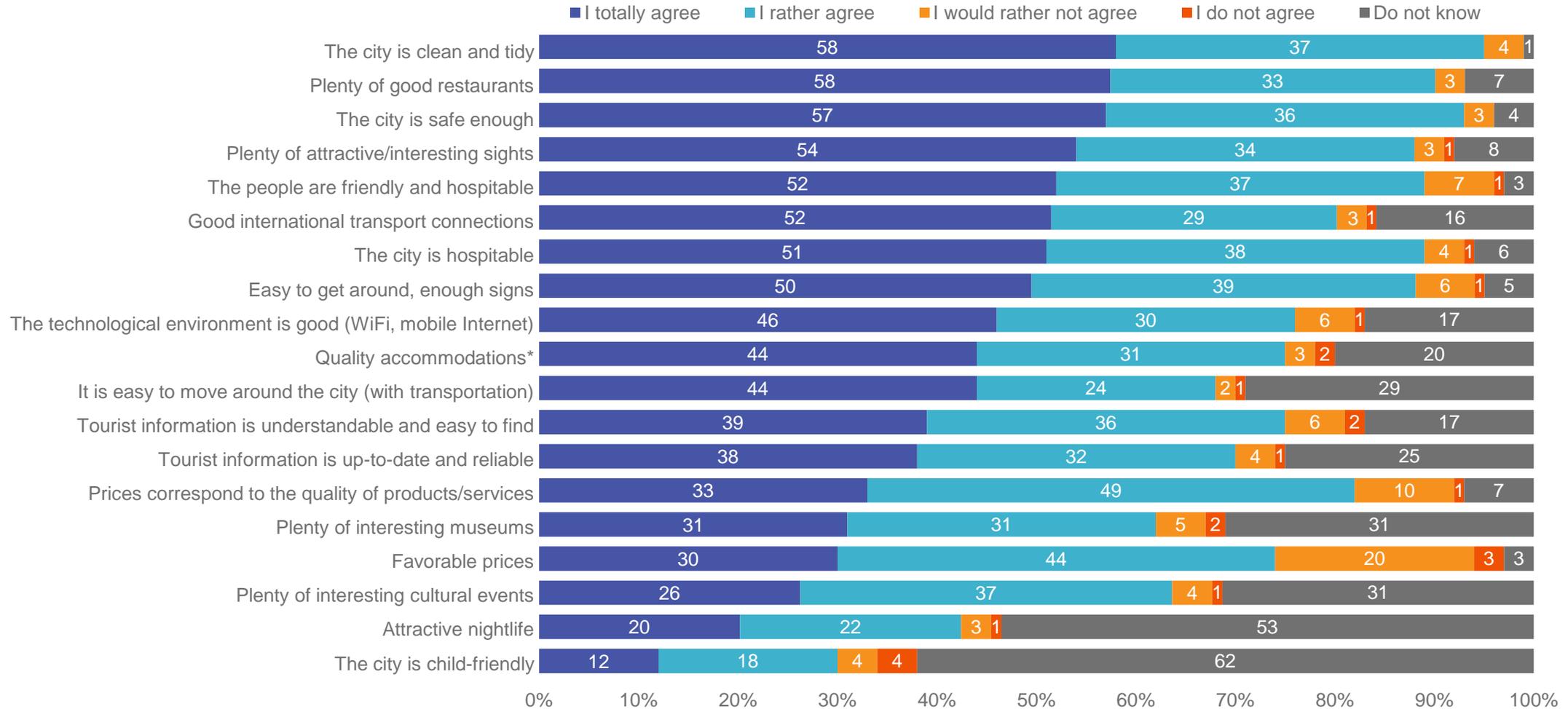


- More often than average, the 9-10 score was given by:
 - visitors travelling alone;
 - top managers, leading specialists, senior officials;
 - visitors from Russia;
 - those on a multiple day holiday.
- Only 1% (or 5 people) of foreign visitors to Tallinn gave a rating of 1-4.

The reputation of Tallinn

% of Tallinn foreign visitors, n=1461

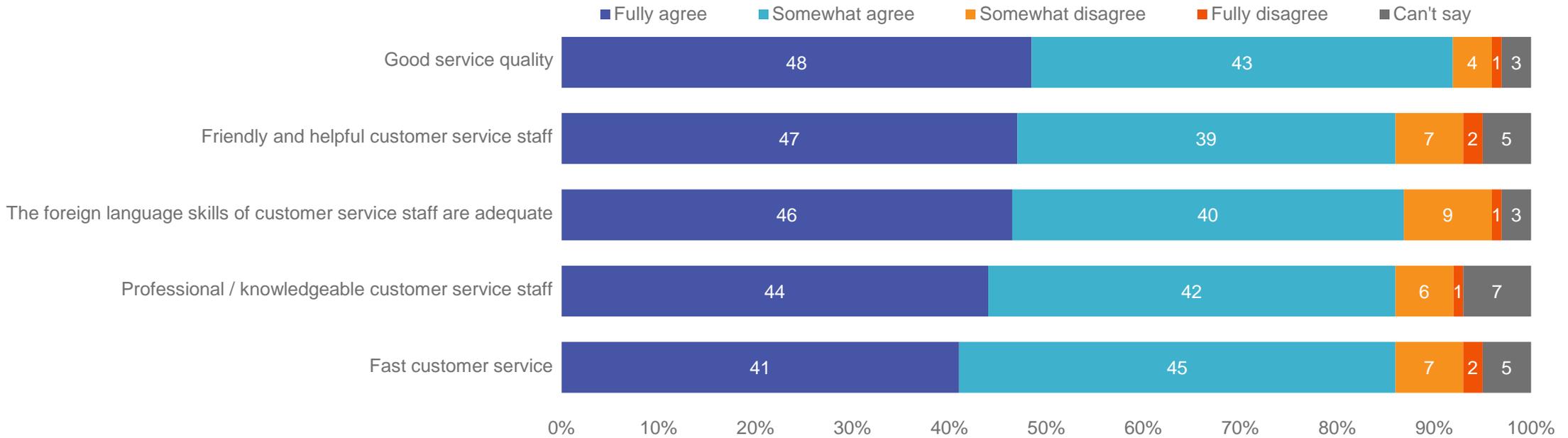
23. To what extent do you agree with the following statements about the city of Tallinn?



Service culture of Tallinn

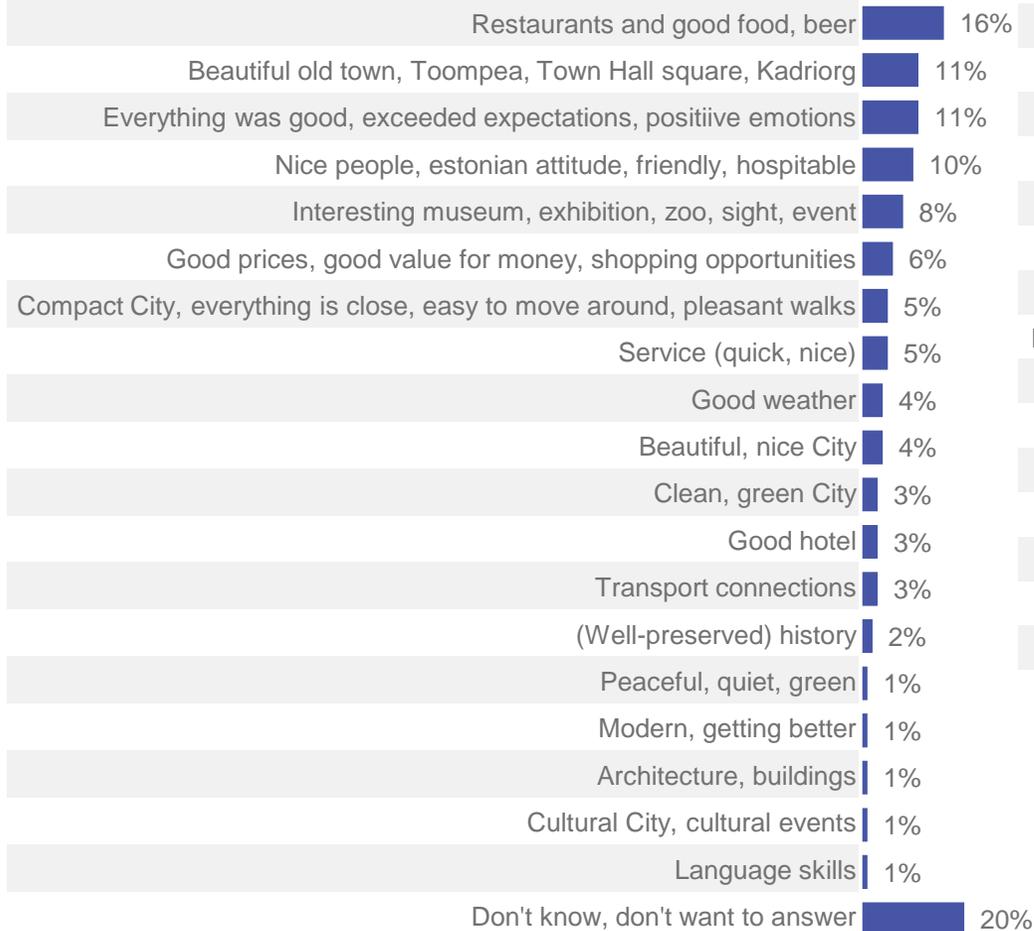
% of Tallinn foreign visitors, n=1461

24. How much do you agree with the following statements about service culture in Tallinn?

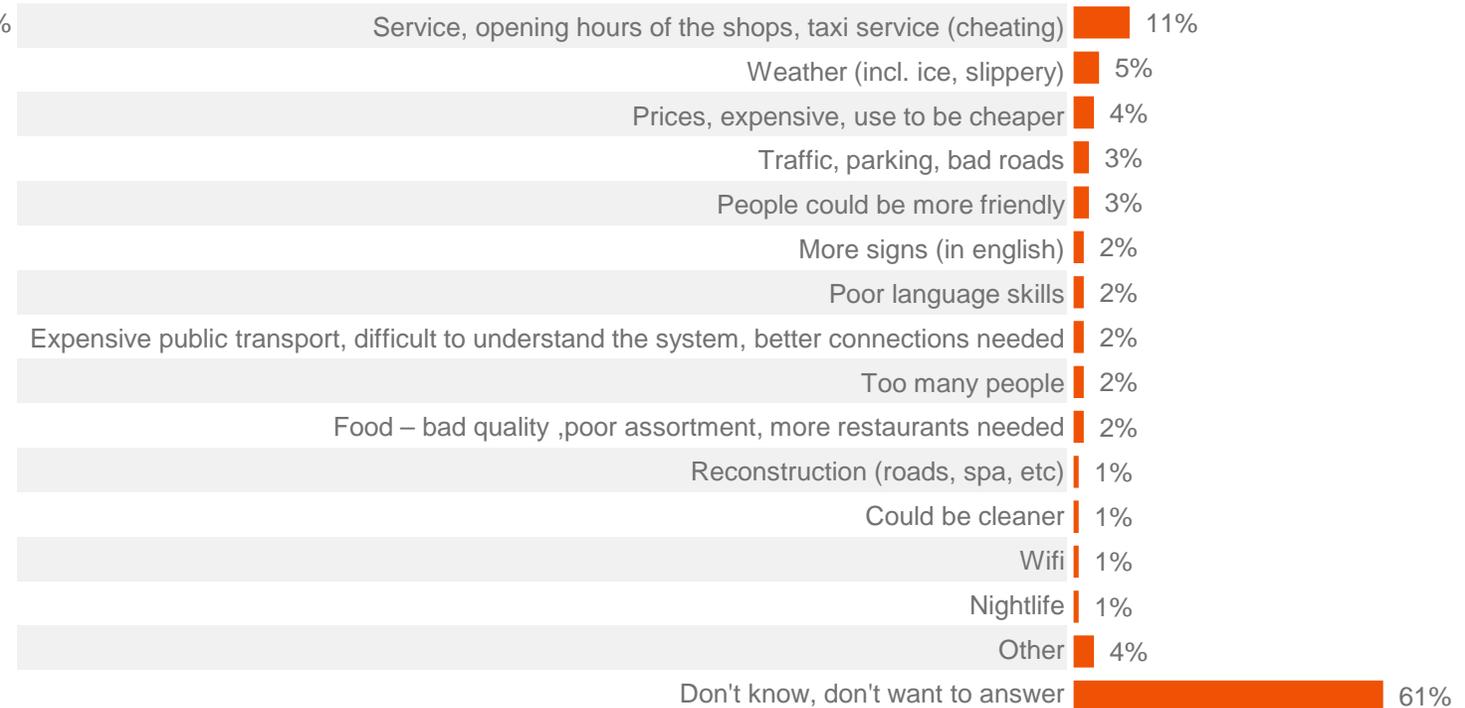


Comments on Tallinn

27. Would you like to comment anything about Tallinn – what was your best / most positive experience in Tallinn?



28. Would you like to comment on anything that you were dissatisfied with or that needs to be improved?



Estimation of the number of tourists in Tallinn

% of Tallinn foreign visitors, n=1461

25. How would you evaluate the number of tourists in Tallinn according to your personal experience?

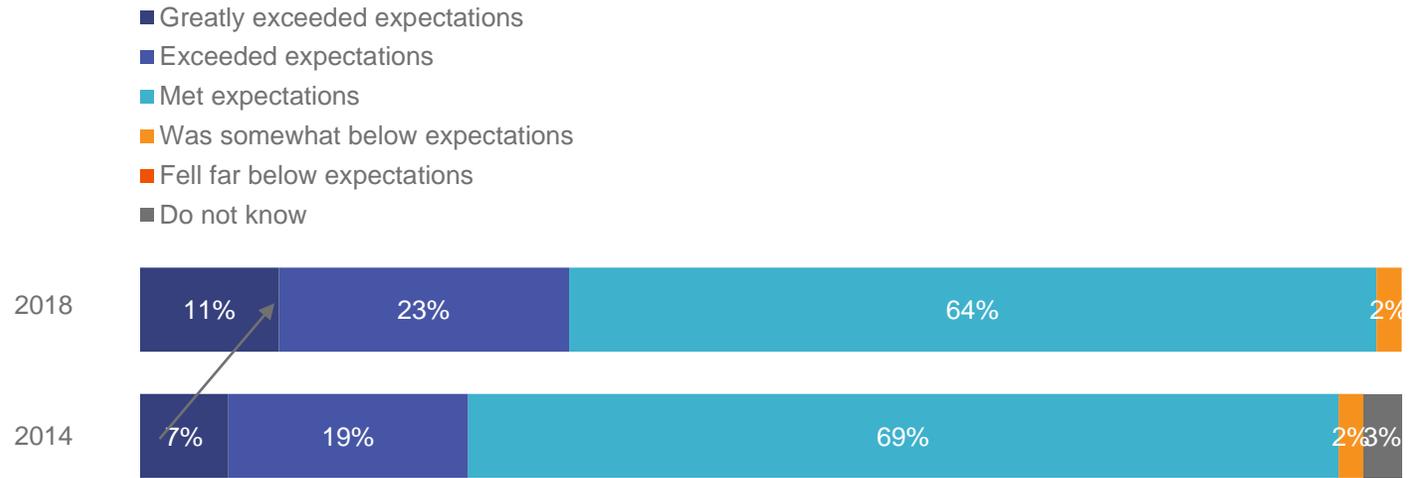
- There could be many more tourists
- There could be a little more tourists
- There is a sufficient number of tourists
- There could be a little less tourists
- There could be much less tourists
- Do not know



Trip to Tallinn meeting the visitor's expectations

% of Tallinn foreign visitors, n=1461

29. Thinking about your expectations before visiting Tallinn and your actual experience, did Tallinn meet your expectations?

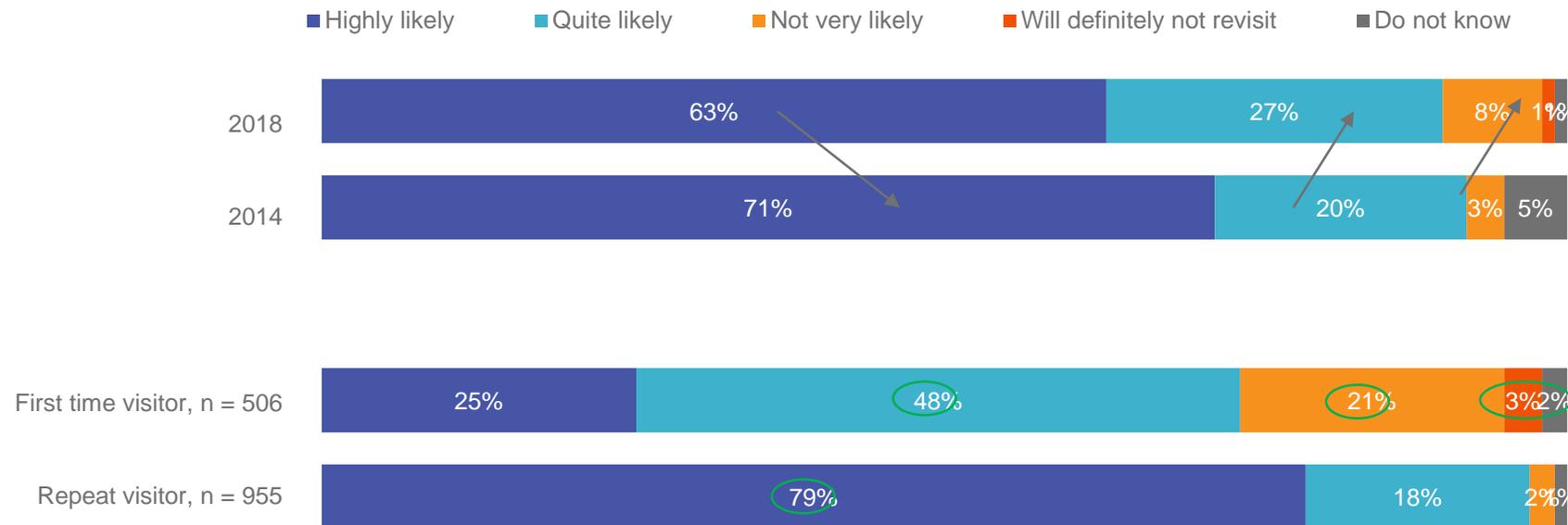


*in 2014 this question was asked: „Considering your initial expectations and experiences during the trip, did the trip meet your expectations? “

Probable repeat visit to Tallinn

% of Tallinn foreign visitors, n=1461

30. Thinking about your visitor experience, how likely are you to revisit Tallinn within the next 5 years?



Possible activities during the next trip to Tallinn

% of those who are planning to come back, n = 1318



Probability of recommendation

% of Tallinn foreign visitors, n=1461

32 If your friends/acquaintances asked for your advice about a travel destination, how likely is it that you would advise them to visit Tallinn on a 10-point scale, where 1 is the lowest rating and 10 is the highest rating?



Average cost per person per day

Average expenditure per person per day, in EUR

Of those who spent money and spent up to 14 nights in Tallinn

Approximately how much do you spend in Tallinn on...



In 2014 total expenses were: Finland 128 €, the UK 90 €, Germany 74 €, Russia 271 €

7

Annexes: Sampling methodology



Data collection

- The study was conducted by the method of Tablet Assisted Personal Interviewing.
- The average length of one interview was 20 minutes.
- The survey was conducted in Finnish, English, Russian and German.
- Interviewing was conducted by 10 interviewers from AS Emor who had been given relevant preparation.
- In 2018, the survey periods were as follows: 19 January - 25 January, 19 February - 27 February, 10 March - 17 March, 11 April - 18 April, 17 May - 24 May, 12 June - 19 June, July - 17 July, 23 August - 30 August, 18 September - 25 September, 17 October - 24 October, 23 November - 30 November, 10 December - 17 December
- The interviews with cruise passengers took place during the survey periods in May, June, July, August and September .

Annex 1

Sampling methodology 2018

- The total population of the survey is all foreign visitors to Tallinn in 2018. A total of 1,611 foreign visitors, including 150 cruise passengers, were interviewed during the survey.
- When selecting the sample, the respondents were divided according to the country of residence, with the aim of representing the priority target markets for Tallinn with a sufficient number of respondents. Priority target markets are Finland, Sweden, Norway, Great Britain, Germany, Russia and Latvia. Visitors to Tallinn from other countries were also included in the survey.
- The preliminary sample distribution was compiled on the basis of the 2017 statistics of foreign visitors staying in the accommodation establishments of Tallinn. Respondents were divided:
 - across the year by month, taking into account the seasonal variation of the visitors (i.e., the interviews are conducted every month of the year, at different weeks of the month and on all days of the week);
 - between the survey places, the main arrival methods are taken into account by country of residence. The main polling stations are Tallinn Airport, Tallinn Port, Tallinn Bus Station and Narva Border Point.

Annex 2

Sampling methodology 2018

- The sample of the study has been compiled using Stratified Sampling. The place of origin of the respondent, the place of performing the interview (i.e., the gate of the respondent leaving Tallinn) has been set as strata.
- The following is a breakdown of the planned and actual sample for 2018 according to the countries and gates (P - port, A - airport, L - land).

Planned sample (2018)

	P	A	L	Total	Incl Cruise
Finland	325	25	0	350	0
Sweden	85	40	0	125	0
Norway	10	85	5	100	0
the United Kingdom	80	110	10	200	11
Germany	75	140	10	225	41
Russia	25	65	110	200	0
Latvia	5	50	95	150	0
Other countries	85	40	25	150	98
Total:	690	555	255	1500	150

Actual sample (2018)

	P	A	L	Total	Incl Cruise
Finland	330	25		355	0
Sweden	87	39		126	0
Norway	5	95		100	0
the United Kingdom	41	149	11	201	19
Germany	69	168	8	245	40
Russia	28	62	111	201	1
Latvia	7	44	99	150	0
Other countries	174	41	18	233	90
Total:	741	623	247	1611	150

Data weighting (1)

- In this report, the data are weighted according to the following weighting methods:
- **Weighting Method I:**
 - Since 1 May 2004, the number of overnight stays in official accommodation establishments in Tallinn has been used as official statistics. National statistics are accompanied by visitors accommodated free-of-charge and one-day visitors to Tallinn (proportions by country according to the results of the Survey of Foreign Visitors to Tallinn 2018).
- **Weighting Method II:**
 - In addition to national statistics and the results of the Survey of Foreign Visitors to Tallinn 2018, Tallinn Port statistics on cruise passengers have also been taken into account in terms of visitors accommodated in Tallinn free of charge and one-day visitors.
- For comparability purposes, the results in this report are presented using weighting methodology I, but estimates for the population (i.e., estimates of the number of foreign visitors to Tallinn and the proportion between countries) are presented using weighting methodology II.
- The following are the totals that are used as the basis for weighing the data (Methodology I).

Data weighting (2)

NUMBER OF ACCOMMODATED FOREIGN VISITORS, 2018 (According to the Estonian Statistical Office)					
	2018 I Qr	2018 II Qr	2018 III Qr	2018 IV Qr	TOTAL
Finland	121 354	153 992	158 755	144 145	578 246
Sweden	9 097	13 242	16 290	11 080	49 709
Norway	4 609	7 436	7 861	8 753	28 659.
the United Kingdom	8 542	14 186	17 085	12 252	52 065
Germany	8 729	32 866	44 969	15 065	101 629
Russia	45 208	28 980	27 630	38 385	140 203
Latvia	12 608	14 315	13 523	16 109	56 555
Other countries	60 657	130 264	181 677	83 062	455 660
Total:	270 804	395 281	467 790	328 851	1 462 726

EVALUATION OF THE TOTAL NUMBER OF FOREIGN VISITORS TO TALLINN 2018, OVERNIGHT STAY, (no cruise)			
	paid + free accommodation	One day visitors	TOTAL
Finland	769 968	868 262	1 638 230
Sweden	62 292	16 960.	79 252
Norway	38 365	3 794	42 159
the United Kingdom	80 721	8 869	89 590
Germany	146 439	21 303	167 742
Russia	175 693	33 465	209 158
Latvia	87 546	30 759	118 305
Other countries	584 179	365 706	949 885
Total:	1 945 203	1 349 118	3 294 321

Data weighting (3)

EVALUATION OF TOTAL POPULATION OF FOREIGN VISITORS 2018, SEASONALITY (without cruise)					
	I quarter	II quarter	III quarter	IV quarter	TOTAL
Finland	343 808	436 275	449 769	408 378	1 638 230
Sweden	14 504	21 112	25 971	17 665	79 252
Norway	6 780	10 939	11 564	12 876	42 159
the United Kingdom	14 699	24 410	29 399	21 082	89 590
Germany	14 408	54 246	74 223	24 865	167 742
Russia	67 442	43 233	41 219	57 264	209 158
Latvia	26 374	29 945	28 288	33 698	118 305
Other countries	126 448	271 553	378 730	173 154	949 885
Total:	6 144 63	891 713	1 039 163	748 982	3 294 321

Comparison of weighted and unweighted samples 2018, no cruise						
	Assessment of the population	% of the population	weighted results	% of the weighted sample	unweighted results	% of the unweighted sample
Finland	1 638 230	50%	727	50%	355	24%
Sweden	79 252	2%	35	2%	126	9%
Norway	42 159	1%	19	1%	100	7%
the United Kingdom	89 590	3%	40	3%	182	12%
Germany	167 742	5%	74	5%	205	14%
Russia	209 158	6%	93	6%	200	14%
Latvia	118 305	4%	52	4%	150	10%
Other countries	949 885	29%	421	29%	143	10%
Total:	3 294 321	100%	1461	100%	1461	100%

Data collection statistics

Place of interviewing	
Port (Tallinn)	591
Airport (Tallinn)	623
Accommodation establishment (Tallinn)	1
Narva	106
Bus Station (Tallinn, Pärnu)	140

Month	
January	81
February	91
March	134
April	122
May	114
June	140
July	142
August	145
September	163
October	120
November	134
December	75

Weather	
Windy	321
Cold	361
Sunny	700
Rainy	146
Cloudy, dry	471

Weekday	
Monday	270
Tuesday	279
Wednesday	209
Thursday	173
Friday	150
Saturday	143
Sunday	237

Annex 2

Project team

The following persons participated in the different stages of the study and were responsible:

Customer contact person:	Karen Alamets
The compiler of the survey plan and report:	Annette Schultz
Creator of the sample:	Katre Seema
Interview coordinator:	Margit Puskar
Data processing:	Alje Roopärg
Graphic works:	Maire Nõmmik