Survey into foreign visitors to Tallinn 2005–2011
General Report

TNS Emor
March 2012

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Introduction

Introduction

- Using the same methodology, the survey of foreign visitors to Tallinn has been ordered by Tallinn City Enterprise Board and carried out since year 2002 by TNS Emor. 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.

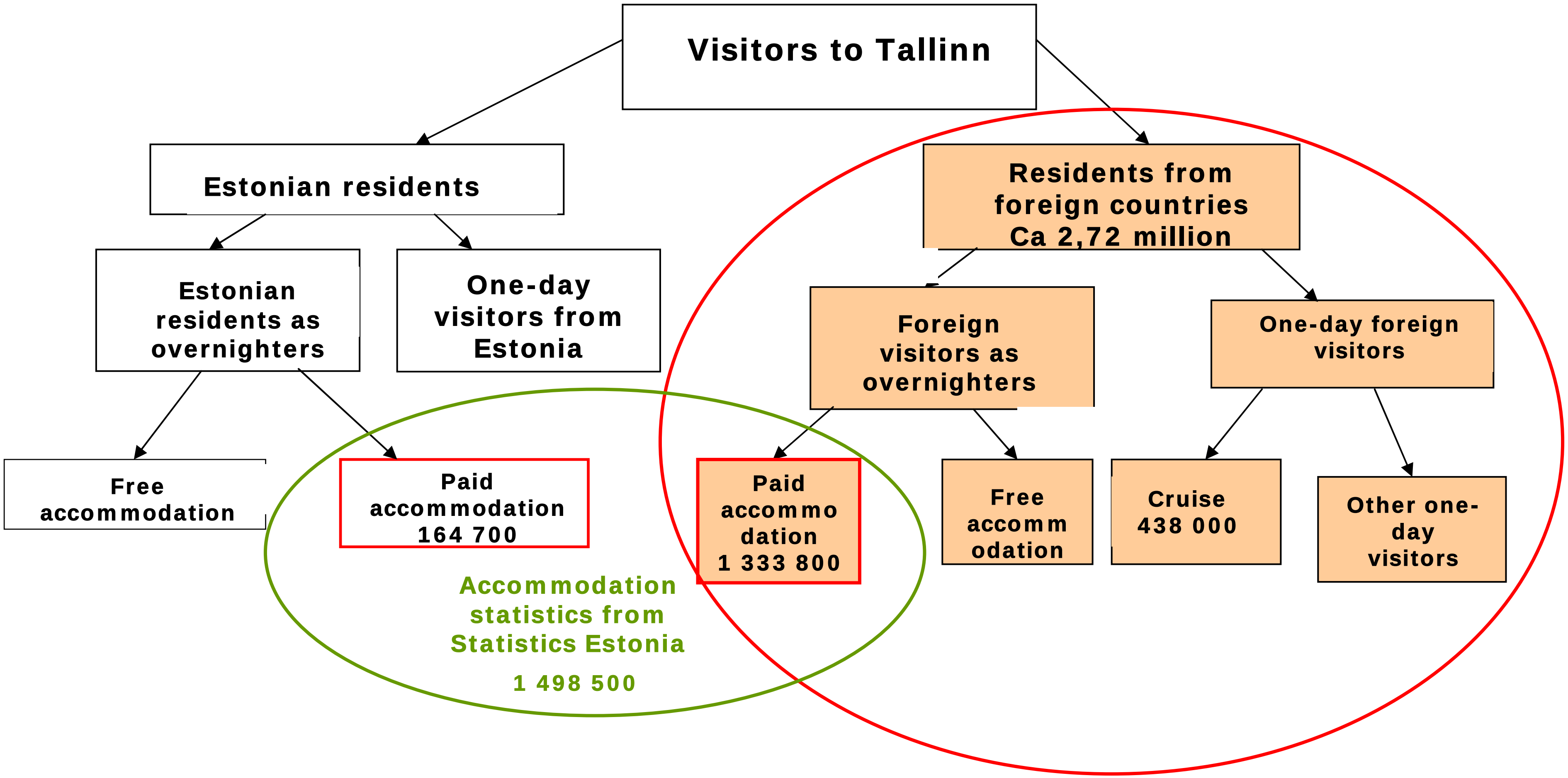
The main goal of the survey is to collect detailed data on foreign visitors to Tallinn, the purpose of their trip, evaluations and spending made during the trip. The survey reveals:

  - from which country, 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 and on what foreign visitors spend money and how they evaluate the value for money received for the products/services.

- The results of the research serve as an input in evaluating the competitiveness of Tallinn as a tourist attraction and in planning further development activities with the aim of increasing Tallinn revenue from tourism and turning Tallinn into an even more attractive and tourist-friendly city.

- The data in the 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 2008 and 2005.
- The report describes foreign visitors to Tallinn as whole. Reports on the eight target countries, cruise voyagers and turnaround travellers are provided in separate documents.

Target groups of the survey and existing accommodation statistics



2

Foreign visitor to Tallinn 2011
(incl. cruise and turnaround tourists)

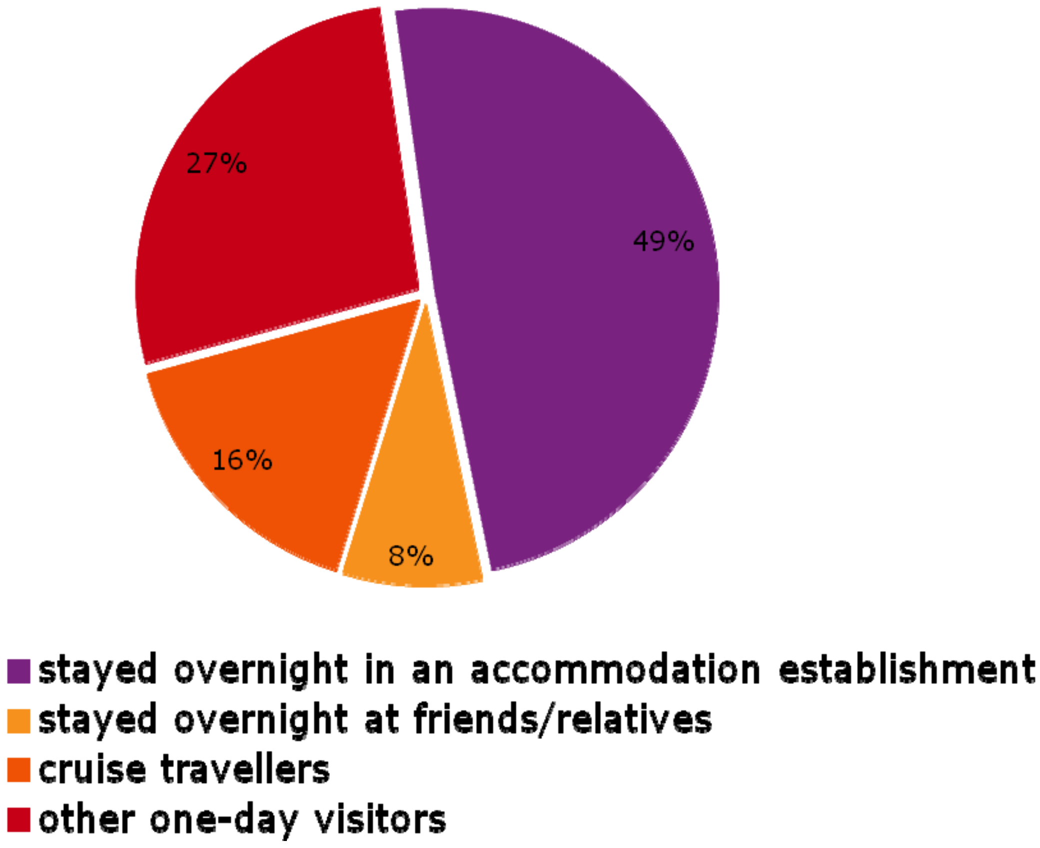
Evaluation to overall number and structure of all foreign visitors to Tallinn in 2011

Compared to 2008, the estimated number of foreign visitors increased by 3%

EVALUATIONS TO OVERALL NUMBER OF FOREIGN VISITORS IN 2011					
	Paid and free accommodation	One-day visitors	Cruise and turnaround tourists*	TOTAL	% of all foreign visitors
Finland	634811	496759	NA	1131570	42%
Sweden	71808	36174	NA	107982	4%
Norway	49033	4033	NA	53066	2%
United Kingdom	69902	9986	65700	145588	5%
Germany	87990	4534	83220	175744	6%
Russia	217479	81667	21900	321046	12%
Latvia	69107	6918	NA	76025	3%
Spain	26791	5371	52560	84722	3%
Other countries	325206	83858	214620	623684	23%
Total:	**1552127**	**729300**	**438000**	**2719427**	**100%**

Sources of data: *the number of foreign tourists who had used accommodation is based on the 2011 statistics provided by Statistics Estonia.*
The estimated number of tourists who used free accommodation is based on survey into foreign visitors to Tallinn.
The estimated number of those who stayed in Tallinn for one day is based on the survey into foreign visitors to Tallinn.
The number of cruise and turnaround tourists is based on the statistics of Port of Tallinn.
*Turnaround tourists are those cruise voyagers who come or go by a cruise ship and arrive or depart by plane.

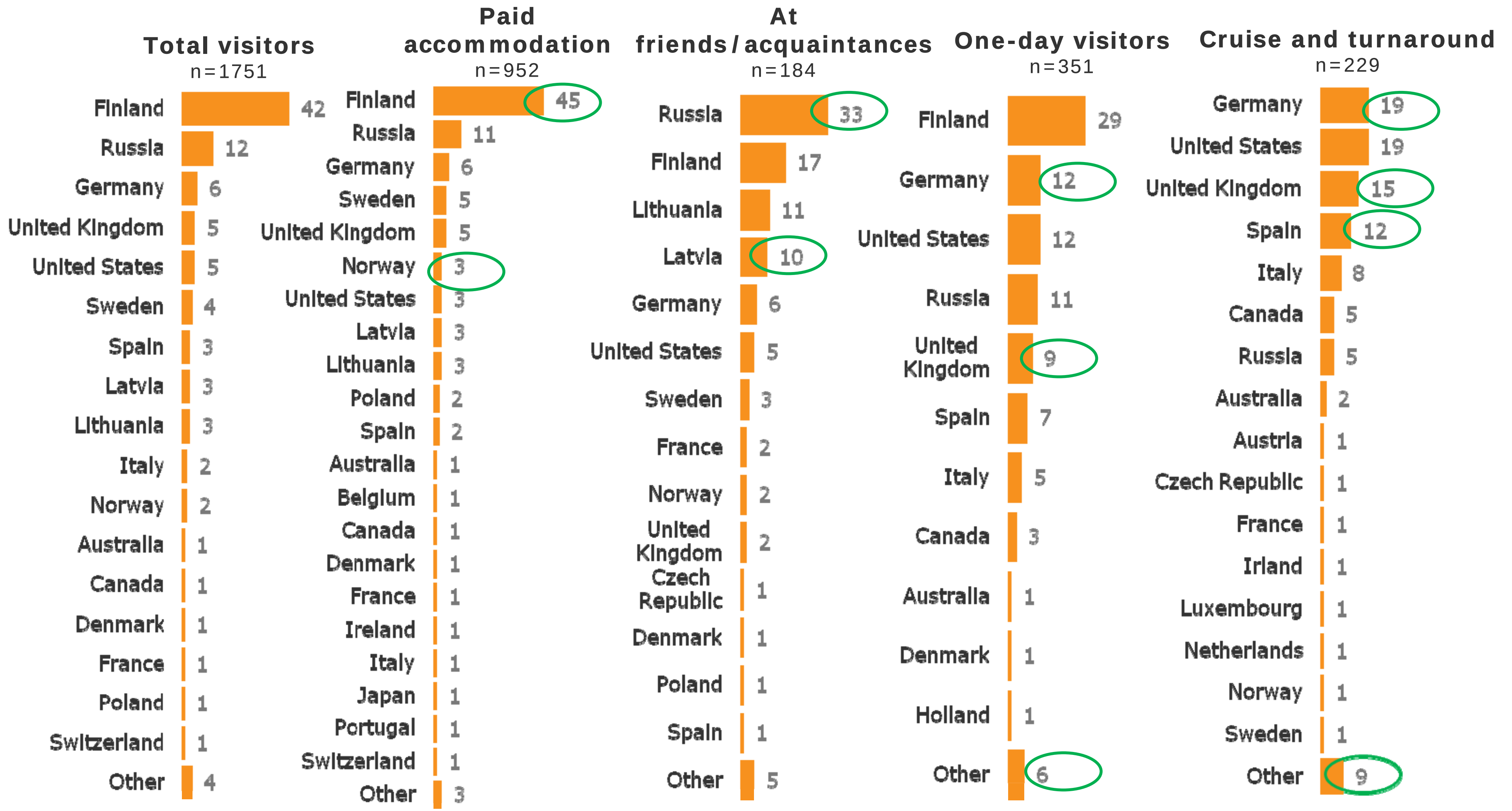
Division of foreign tourists to Tallinn in 2011, including cruise and turnaround tourists



Profile of foreign visitors to Tallinn (1): country of residence 2011

% of all visitors, incl. cruise and turnaround tourists, n=1751

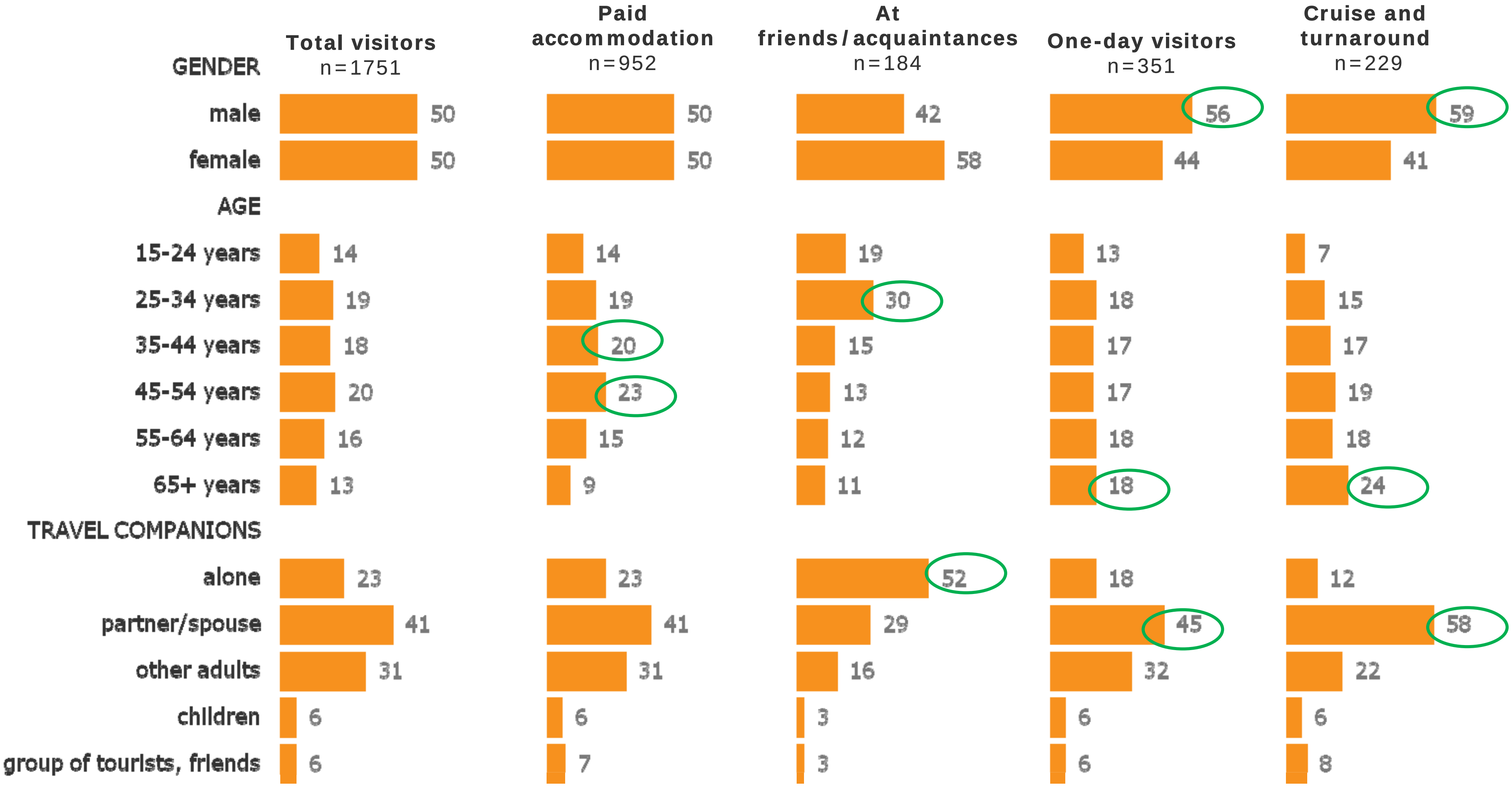
indicates the target group´s statistically significant proportion compared to average of all visitors



Profile of foreign visitors to Tallinn (2): 2011

% of all visitors, incl. cruise and turnaround tourists, n=1751

indicates the target group´s statistically d significant proportion compared to average of all visitors



Profile of foreign visitors to Tallinn (3): 2011

% of all visitors, incl. cruise and turnaround tourists, n=1751

indicates the target group´s statistically d significant proportion compared to average of all visitors

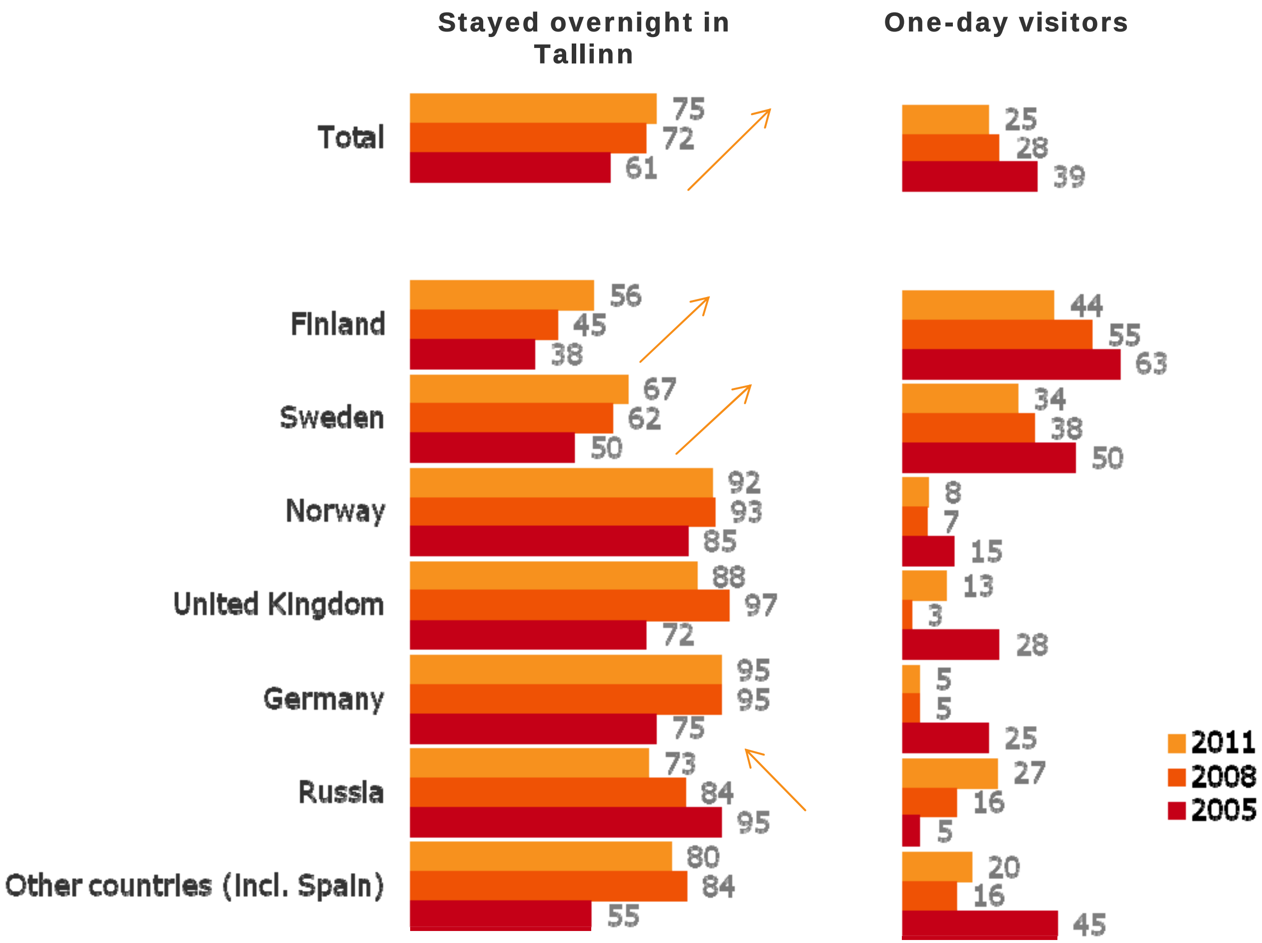
3

Foreign visitor to Tallinn 2005–2011
(excl. cruise and turnaround tourist)

Changes in profile of foreign tourists to Tallinn 2005–2011

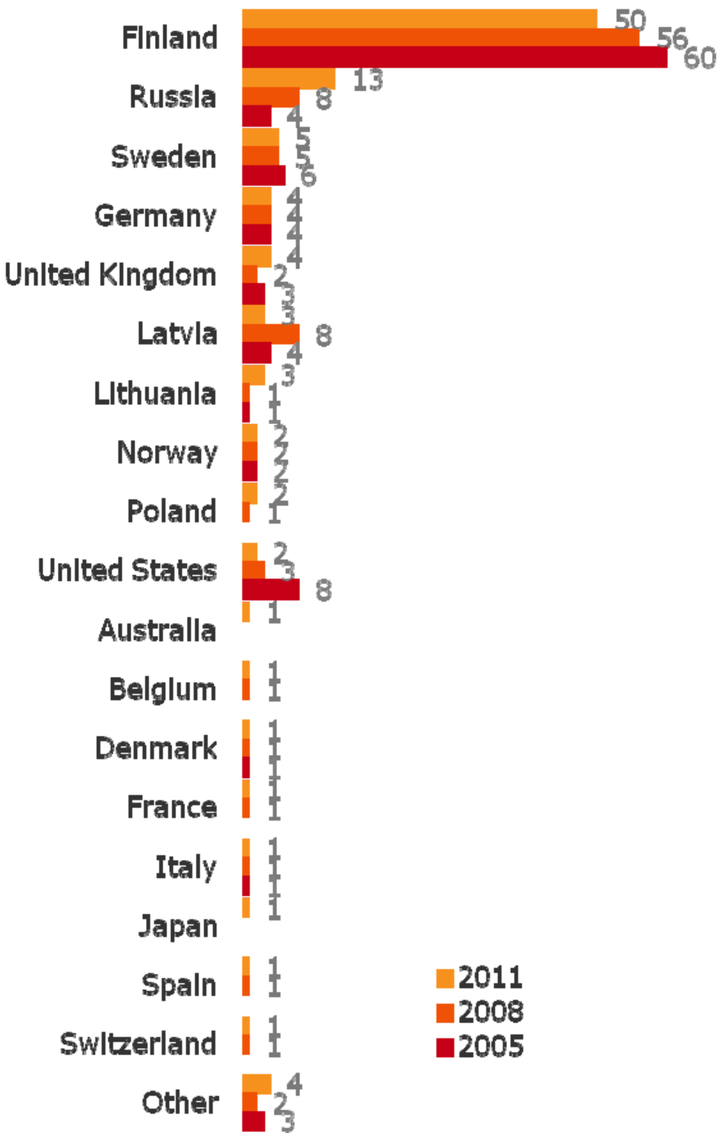
The proportion of those who stay overnight has increased

% of visitors to Tallinn (excl. cruise and turnaround), n=1522



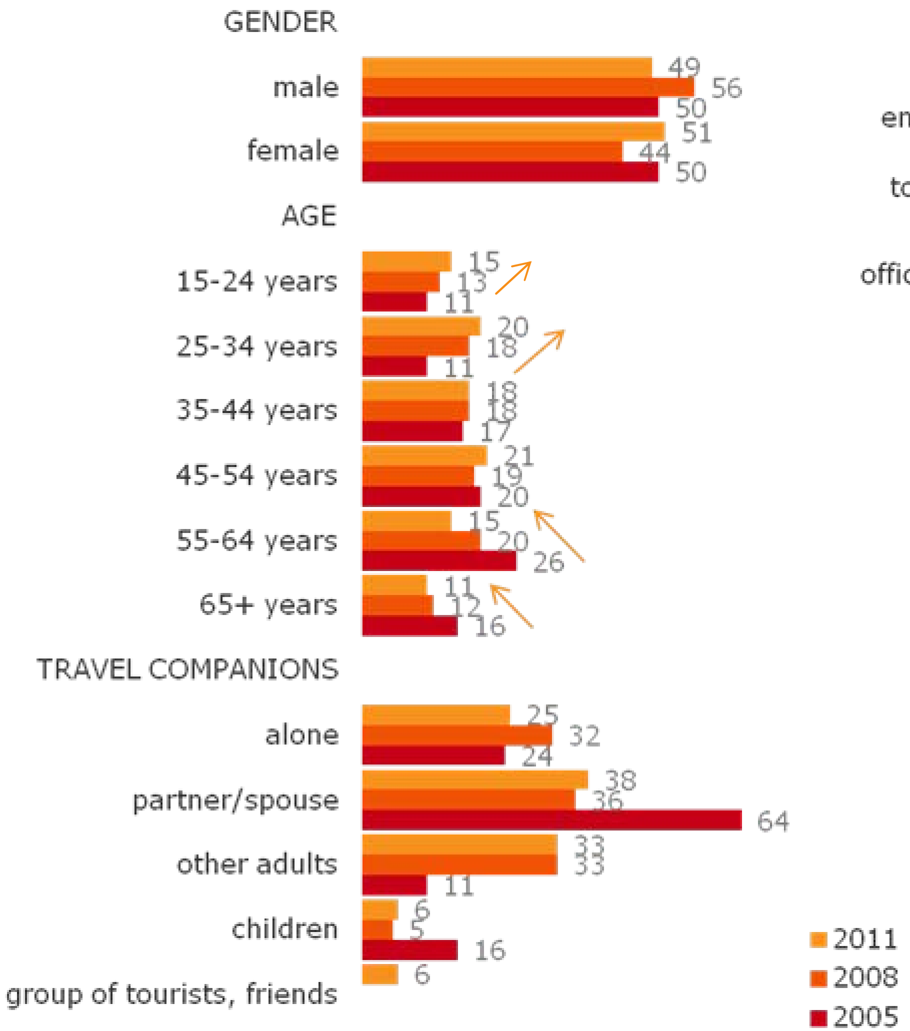
Respondent profile (1): country of residence 2005–2011

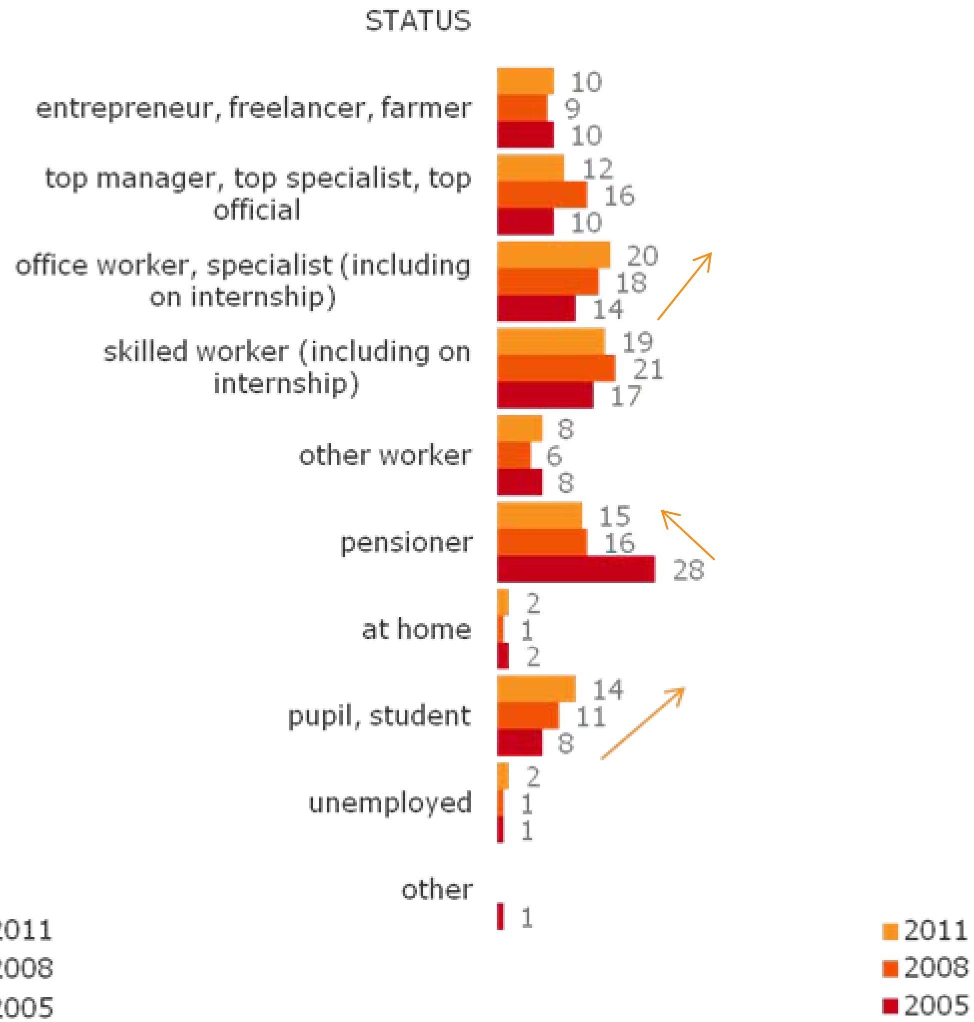
% of visitors to Tallinn (excl. cruise and turnaround), n=1522



Socio-demographic profile of foreign visitors to Tallinn 2005–2011

% of visitors to Tallinn (excl. cruise and turnaround), n=1522





Summary
Foreign visitors in 2011, incl. cruise and turnaround tourists

- According to statistics of Statistics Estonia and Port of Tallinn, altogether 2.72 million foreign tourists visited Tallinn in 2011. Of those, 1.55 million (57%) spent the night in Tallinn: in accommodation establishments (49%) and at acquaintances (8%), 0.79 million were one-day visitors (27%) and 0.438 million include cruise and turnaround tourists* (16%).

  *Turnaround tourists are those cruise voyagers who come or go by a cruise ship and arrive or leave by plane.
- Among all visitors, the proportion of male and female tourists as well as tourists in all age groups was quite similar. There are differences, however, in terms of the types of foreign visitors: the cruise/turnaround tourist is older, the one who stays the night at an acquaintance is rather younger, those between 35-54 generally spend a night at an accommodation establishment and the proportion of one-day visitors is quite similar in all age groups.
- About every fourth visitor arrives in Tallinn alone and more frequently they spend the night at friends/acquaintances. Those who come together with someone, are most often accompanied by a partner or a spouse.
- White-collar employees account for the largest proportion of visitors (42%) and they can mostly be found among those who spend a night at an accommodation establishment as well as among cruise/turnaround tourists. Every fourth visitor is a blue-collar worker and they can relatively more often be found among cruise tourists. The proportion of pensioners account for 17% and pupils/students for 13% of all visitors.

Summary
Main changes between 2005–2011

- **The number of foreign visitors to Tallinn** (here and from here on without cruise and turnaround tourists) **stood at 2.28 million in 2011, which is more** than three years ago, therefore a increasing trend can be sighted (in 2005 2.40 million and in 2008 2.21 million people visited Tallinn).
- The proportion of Finnish visitors is still the largest among tourists to Tallinn, but the predominance has been decreasing constantly (71% → 50%). The proportion of Russian tourists has increased (3% → 15%) and there are several new target countries.
- The proportion of those who decide to stay overnight in Tallinn has increased by 14% (from 61% to 75%). The increase was the biggest in 2008/2005, but this trend has also continued in 2011/2008. The increase is mainly due to visitors from Finland and Sweden who decide to spend a night here. These countries provide a good basis for increasing the number of overnighters also in the future since the rate of overnighters from other countries is already very high.
- Visitors to Tallinn are getting younger: the proportion of those aged 15–34 has increased during the three survey periods and the proportion of those aged 55 or over is on the decrease. It must be noted, however, that the number of those aged 15-24 has regained the level of 2002 because between 2002 and 2005 this age group showed a decreasing trend. There are no clear trends in terms of the profile of travel companions, but the situation is similar to year 2008. The same can be said about the visitors´ profession/status. There is a clear changing trend among students and pensioners – the proportion of pensioners is decreasing and the number of students is on the increase.

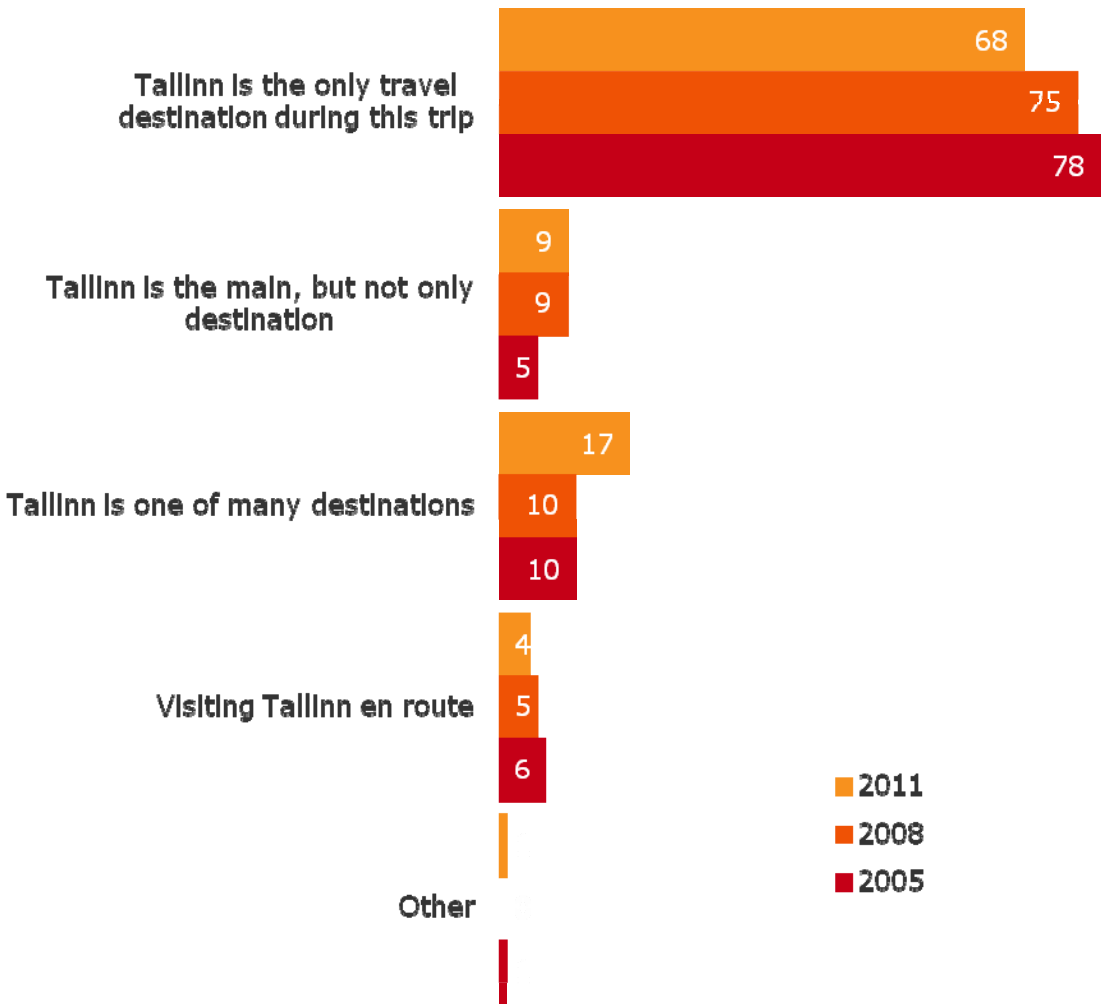
3.1

Foreign visitor to Tallinn 2005–2011
(excl. cruise and turnaround tourists)
Purpose and route of the trip

Tallinn as a travel destination

The role of Tallinn as the only travel destination has decreased

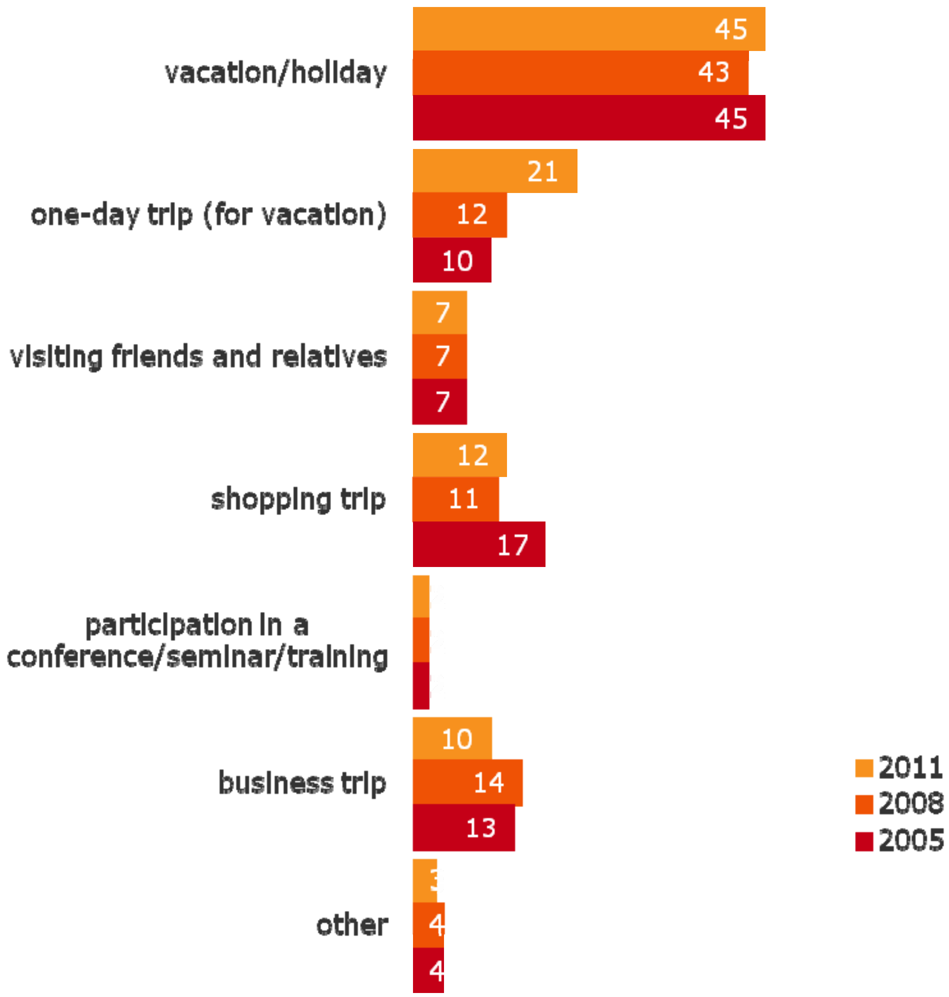
% of all visitors who have spent at least one night away from home (88% of all visitors in 2011), n=1522



Purpose of the trip

Proportion of one-day visitors is on the increase

% of all visitors, n=1522

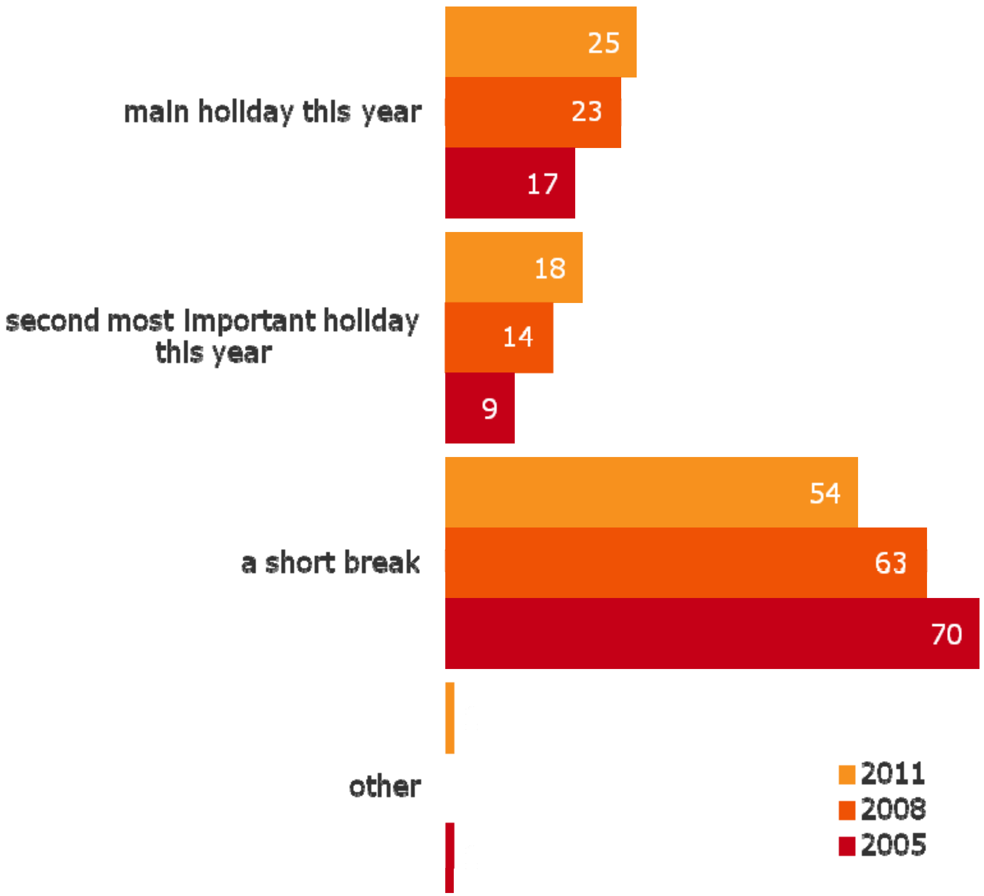


- ***Shopping trip 2011= 2008 shopping trip + health trip***
- ***2008 shopping trip, intended for shopping only***

Meaning of a holiday trip

The importance of the main holiday trip is increasing

% of all visitors who are on a holiday or visiting friends and relatives (52% of all visitors in 2011)



Summary of purpose and route of the trip

- Tallinn as the only destination for those who have been away from home for at least one night by the time they arrive in Tallinn is decreasing throughout years (68% in 2011 *vs.* 75% in 2008). Nevertheless, this indicator remains relatively and similarly high in case of visitors from neighbouring countries (Finland, Norway, Sweden, Latvia). Among visitors from Russia, the number of those for whom Tallinn is the only destination is also above average, but their proportion has somewhat decreased over the past three years.

- Regarding the purpose of the trip, holiday is still the most important among visitors to Tallinn, but the proportion of one-day visitors has increased over the past three years: every fifth visitor in 2011. The change is mainly due to visitors from Finland and changes in their preferences.
- Tourists from Denmark, Norway, Latvia and Russia come relatively more often to Tallinn for a vacation. Visitors from Russia visit friends and relatives more frequently and visitors from Finland and Sweden come for shopping (but also for health) more often than the average.
- In 2011, 52% of all foreign visitors to Tallinn came for a holiday or to visit friends/relatives.
- The proportion of those who consider Tallinn their main or second most important holiday is constantly increasing. From among holiday-makers, Tallinn is the main travel destination for every fourth. More frequently they come from Germany and not from the main eight target countries.
- The residents of Denmark, Norway, Russia and Latvia consider a visit to Tallinn as a short break more often than the average.

3.2

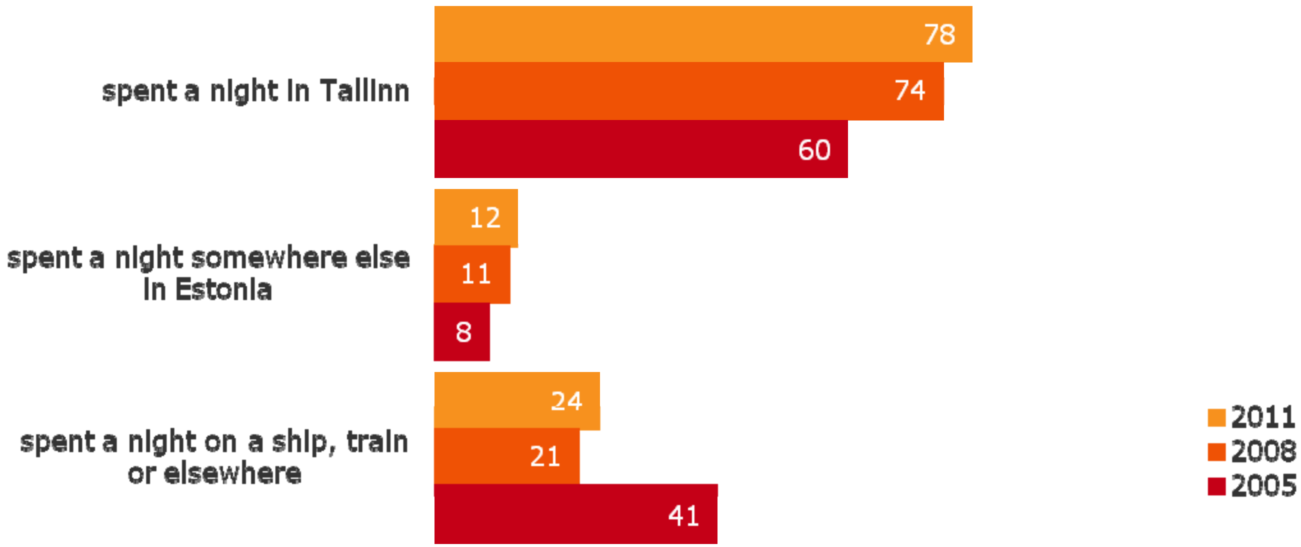
Foreign visitor to Tallinn 2005–2011
(excl. cruise and turnaround tourists)
Spending the night in Tallinn and accommodation

Spending a night away from home

The proportion of those spending a night in Tallinn has increased

% of all visitors, n=1522

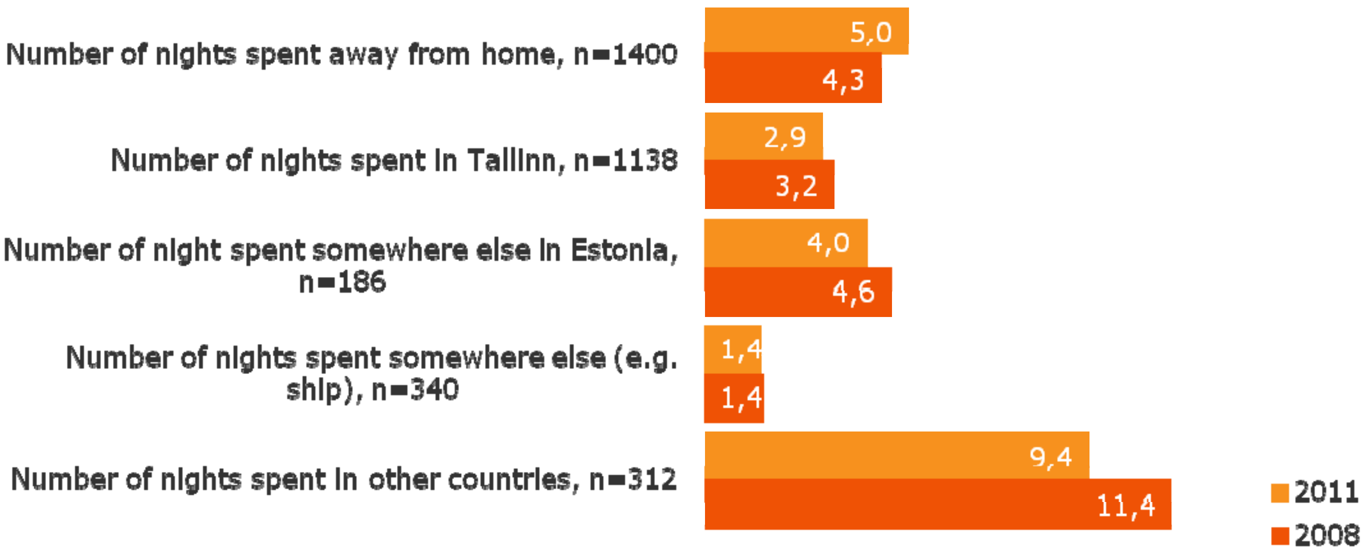
% of all visitors who have spent at least one night away from home, n=1400
Several answers possible



Spending a night away from home

The average length of a trip has increased

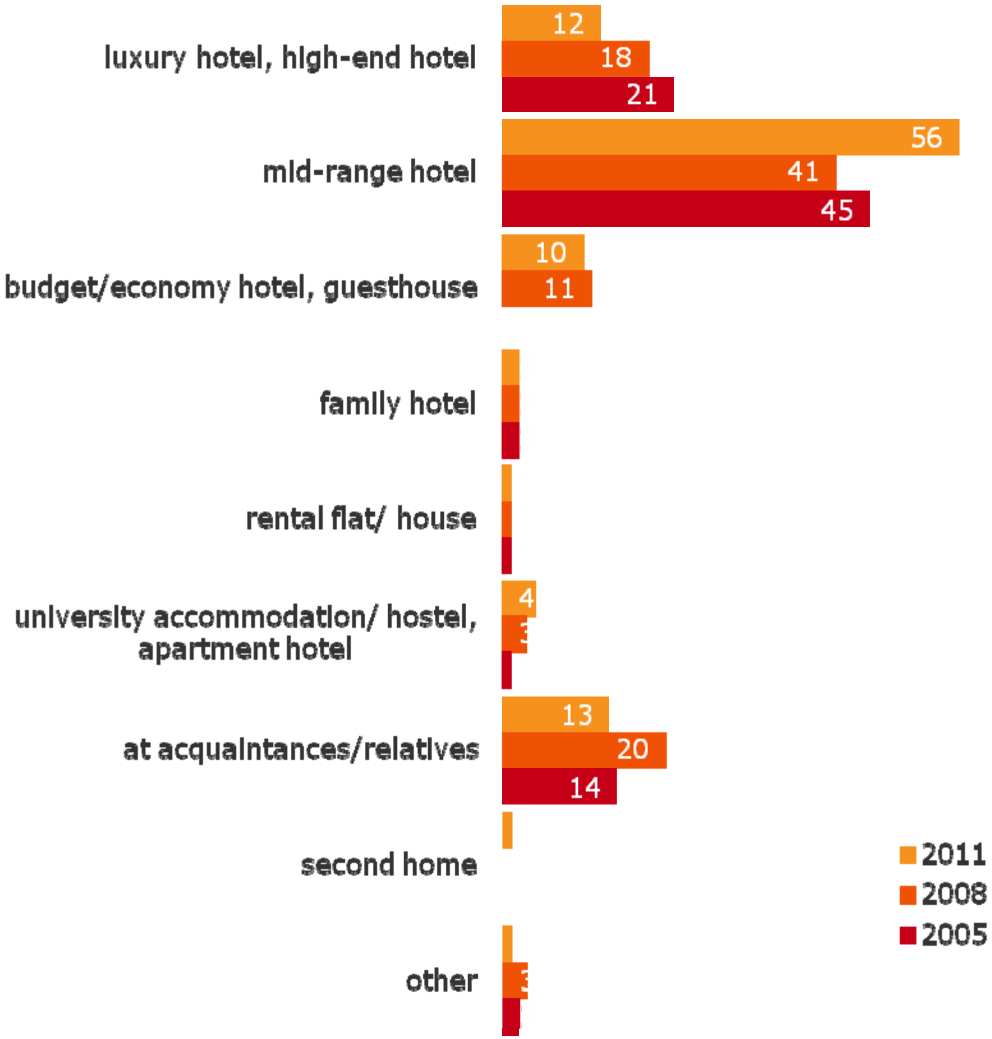
Average number of nights spent away from home among those who spent the night at an indicated place



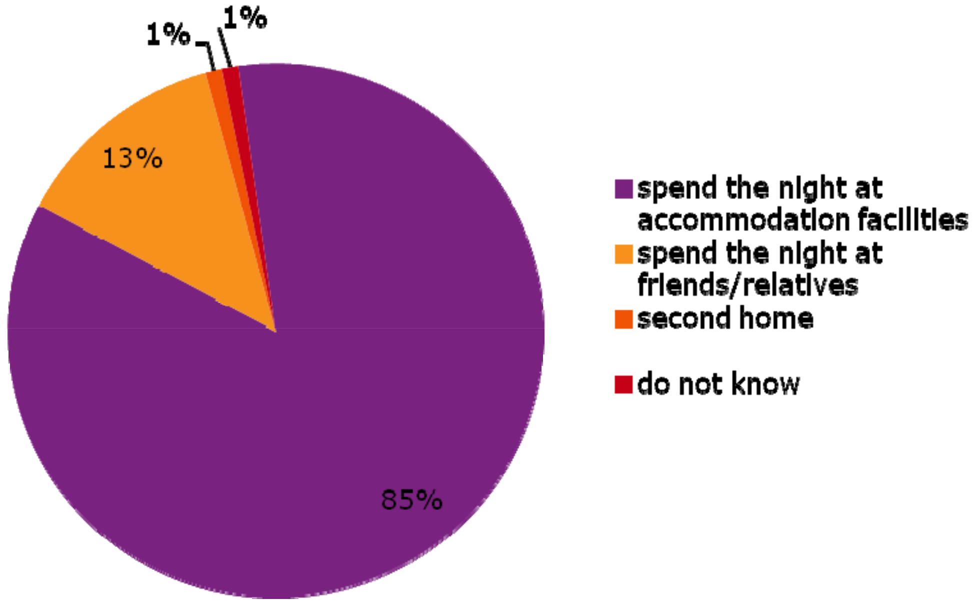
Spending a night in Tallinn

The proportion of those spending a night in a mid-range hotel has increased substantially whereas the number of those staying at friends/relatives has decreased

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



The proportion of paid and free accommodation among foreign visitors to Tallinn in 2011.



Summary

Foreign visitors to Tallinn stay here for longer than before

- The number of foreign visitors who have spent at least one night away from home during their trip has again begun to increase (now 88%) and there are more foreign visitors who spend the night in Tallinn (78%), which stands for higher demand for accommodation establishments.

- Since 2005, the number of those foreign visitors who have spent a night in Tallinn or somewhere else in Estonia has been increasing continuously, but the increase was more substantial in 2005/2008. After a strong fall in 2005/2008, the proportion of those spending the night on a ship, train or somewhere else has now stabilized.

- Nevertheless, the number of nights spent in Tallinn per one visitor has somewhat decreased compared to 2008. Visitors from Russia and Germany show an above average fall in terms of nights spent in Tallinn, but the duration of the trip has also decreased for visitors from both countries. Tourists from Latvia and Sweden now spend more nights in Tallinn but there are no changes in terms of visitors from Finland, Norway and United Kingdom.

- In 2011, most (85%) foreign visitors to Tallinn spent the night at accommodation establishments. 13% spent the night at friends/relatives and 1% in their second home.

- The proportion of those foreign visitors who spend the night at friends/relatives has decreased substantially over the past three years. The number of those using a mid-range hotel has increased a lot in 2008/2011 and this is at the expense of those visitors who spend the night at friends/relatives or luxury hotels.

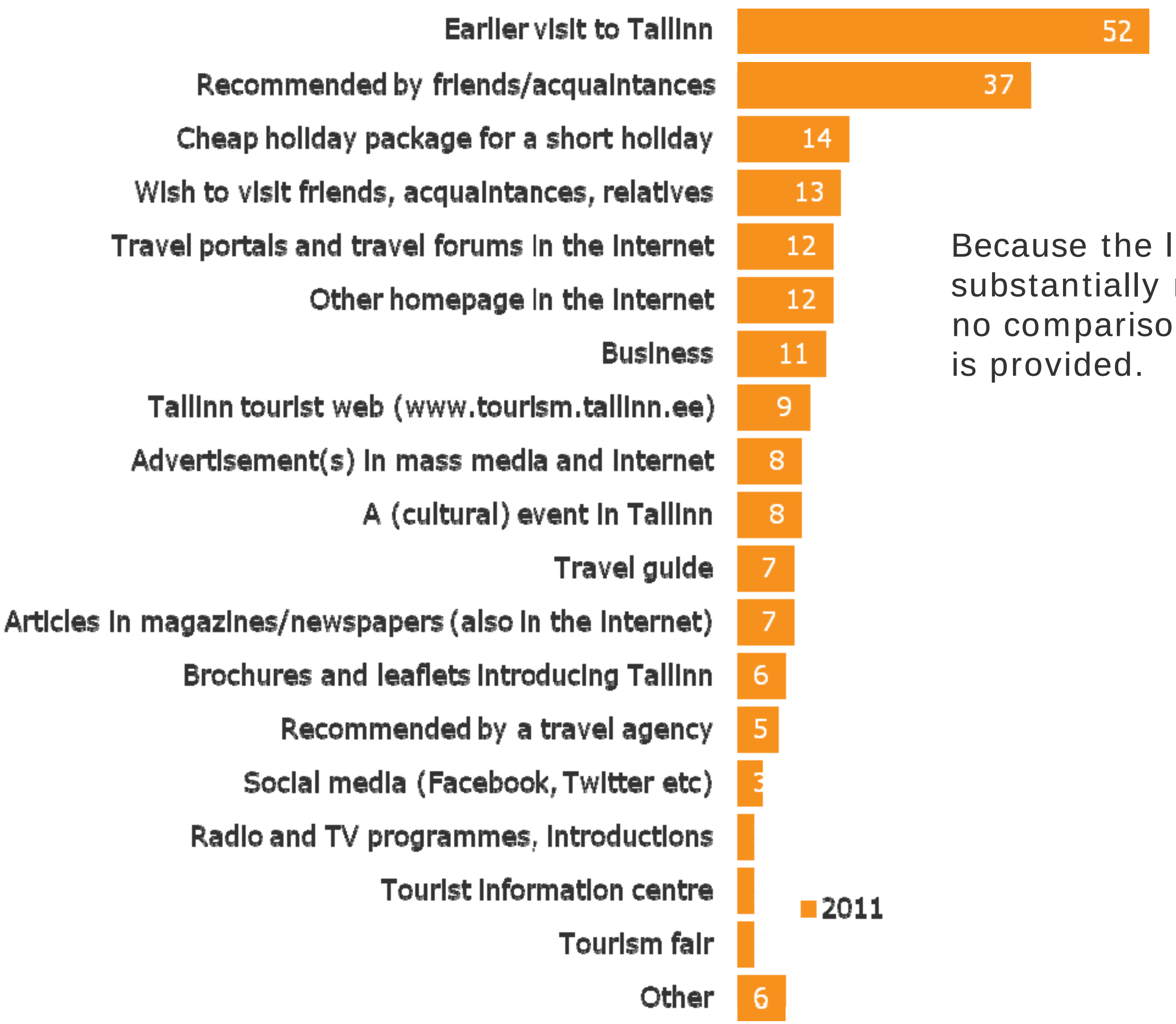
3.3

Foreign visitors to Tallinn 2005–2011
(excl. cruise and turnaround tourists)
Planning a trip to Tallinn

Sources of information on Tallinn

Previous visit is by far the most important source of information

% of all visitors who evaluated the sources of information that influenced them n=1411

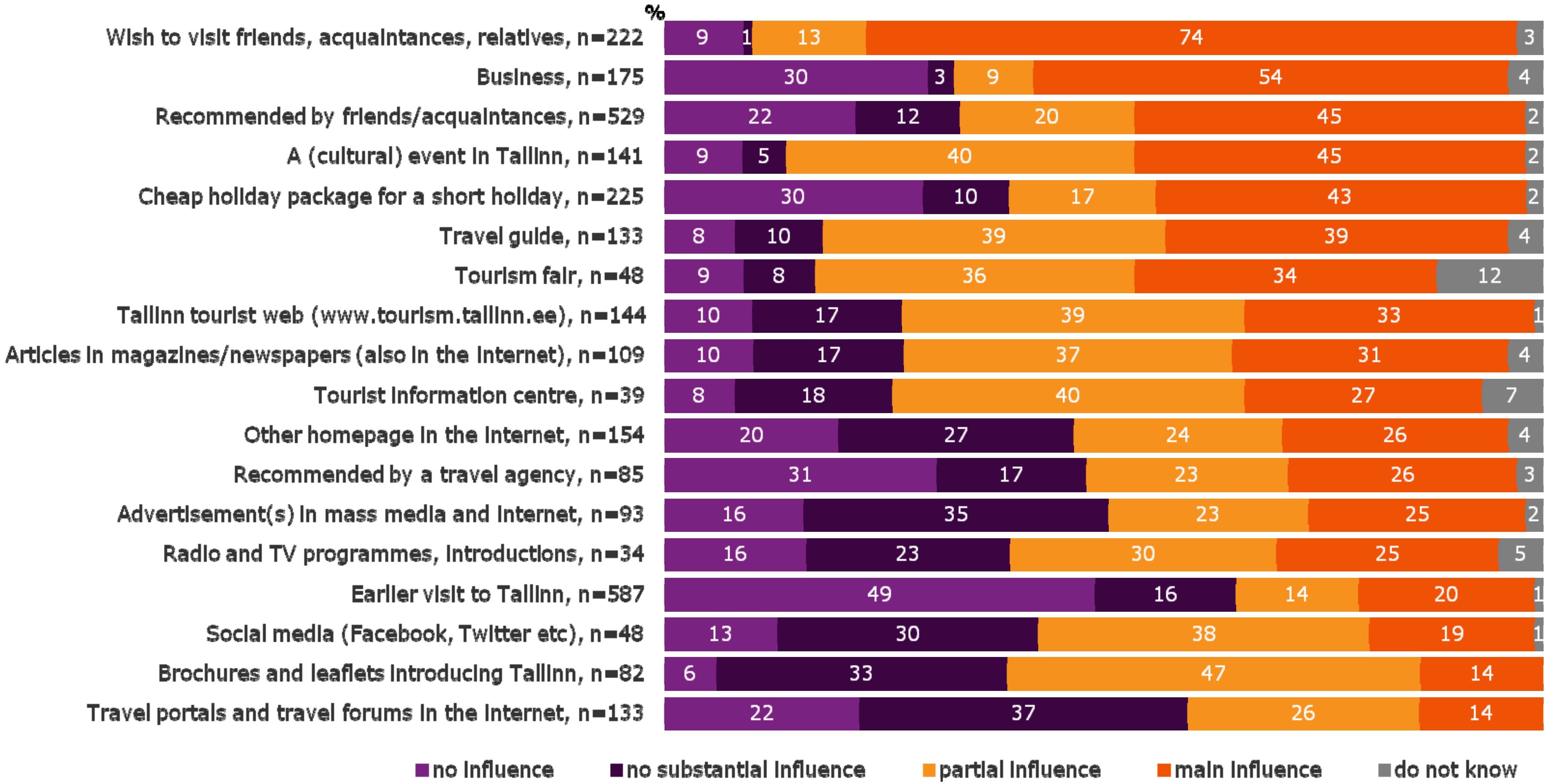


Because the list of information sources was substantially reorganized for the 2011 survey, no comparison with previous periods is provided.

Influence of information sources used before or while visiting Tallinn

Of marketing channels, events, cheap holiday packages and travel guides are the most influential

% of those who had used the source; listed in decreasing importance of the main influencer



TNS

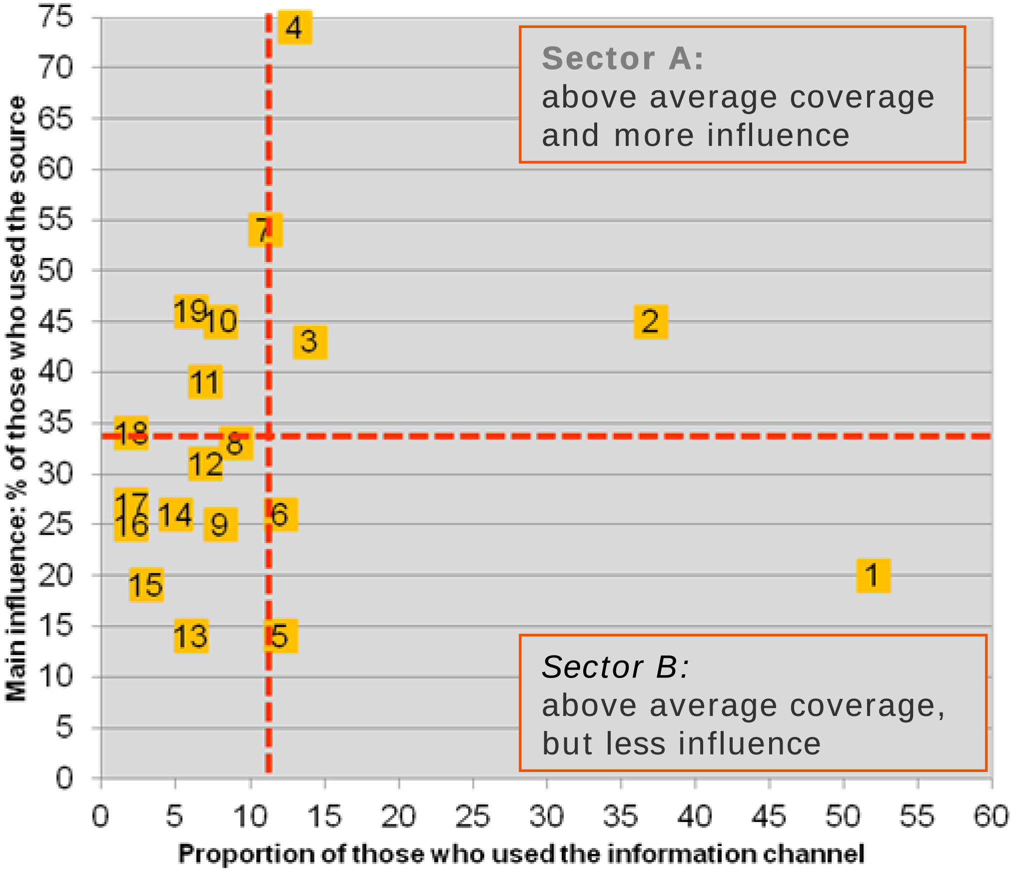
Tallinn

The scope and impact of information sources

Event marketing is effective, but assumes a better reach

Among the visitors, social media remains below average compared to other internet sources both in terms of usage coverage and influence

% of all visitors who evaluated the sources of information that influenced them, n=1411

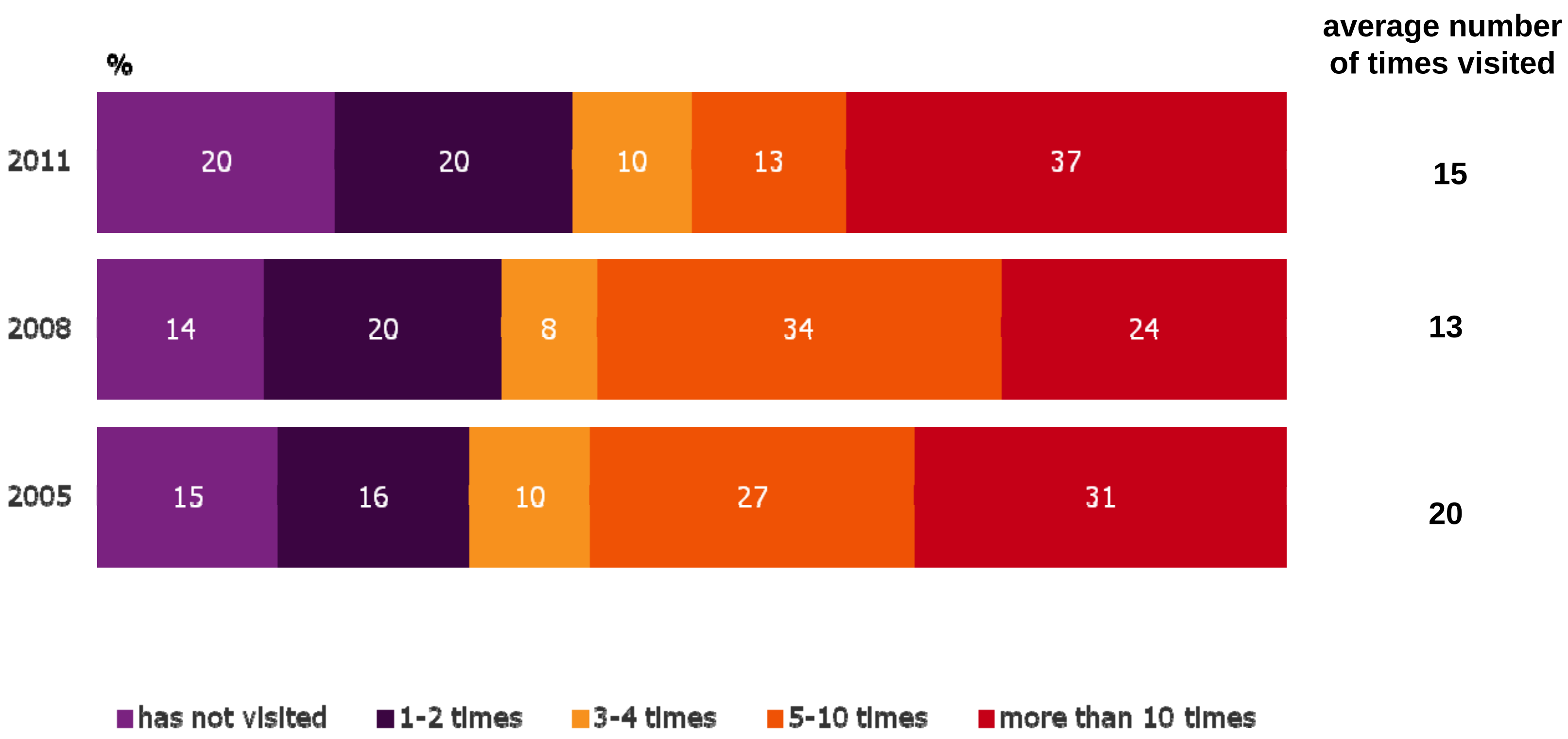


	Information sources
1	*Earlier visit to Tallinn*
2	**Recommended by friends/acquaintances**
3	**Cheap holiday package for a short holiday**
4	**Wish to visit friends, acquaintances, relatives**
5	*Travel portals and travel forums in the internet*
6	*Other homepage in the internet*
7	**Business**
8	**Tallinn tourist web (www.tourism.tallinn.ee)**
9	Advertisement(s) in mass media and internet
10	**A (cultural) event in Tallinn**
11	**Travel guide**
12	Articles in magazines/newspapers (also in the internet)
13	Brochures and leaflets introducing Tallinn
14	Recommended by a travel agency
15	Social media (Facebook, Twitter etc)
16	Radio and TV programmes, introductions
17	Tourist information centre (*NB! different from other sources to acquire information about travelling to Tallinn)*
18	**Tourism fair**
19	Other

The number of previous visits to Tallinn is increasing

Both the proportion of first-time and repeat visits to Tallinn has increased

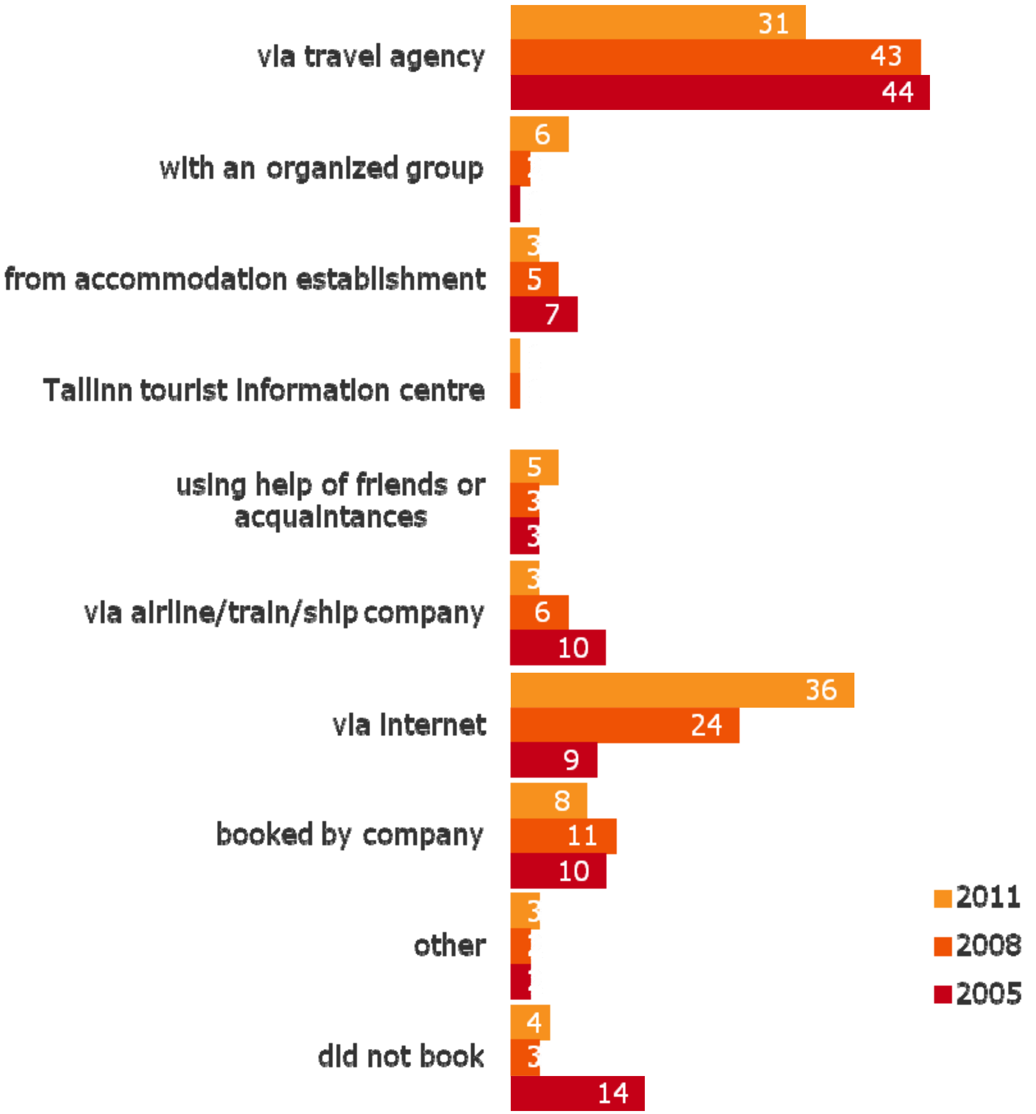
% of all visitors, n=1522



Booking accommodation

Internet has become the no 1 channel for booking

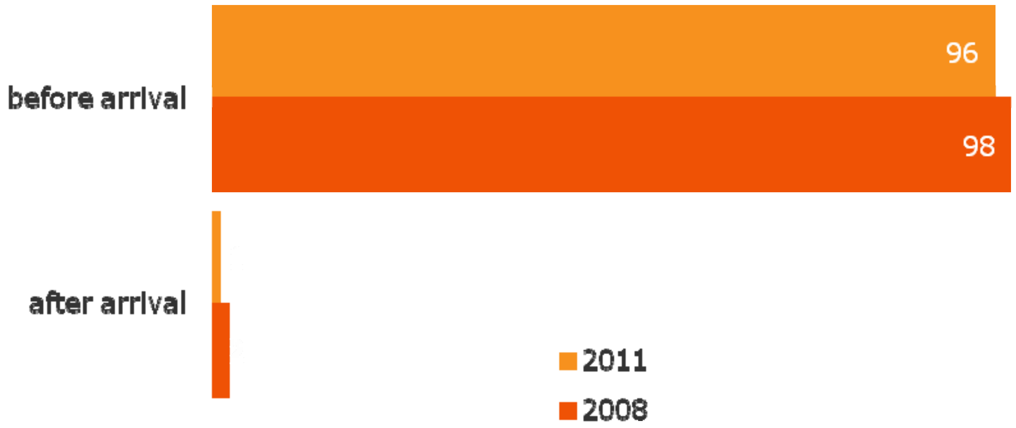
% of all visitors who have spent at least one night in Tallinn and have used accommodation, n=968



Booking accommodation

Nearly all travellers book accommodation before arrival in Tallinn

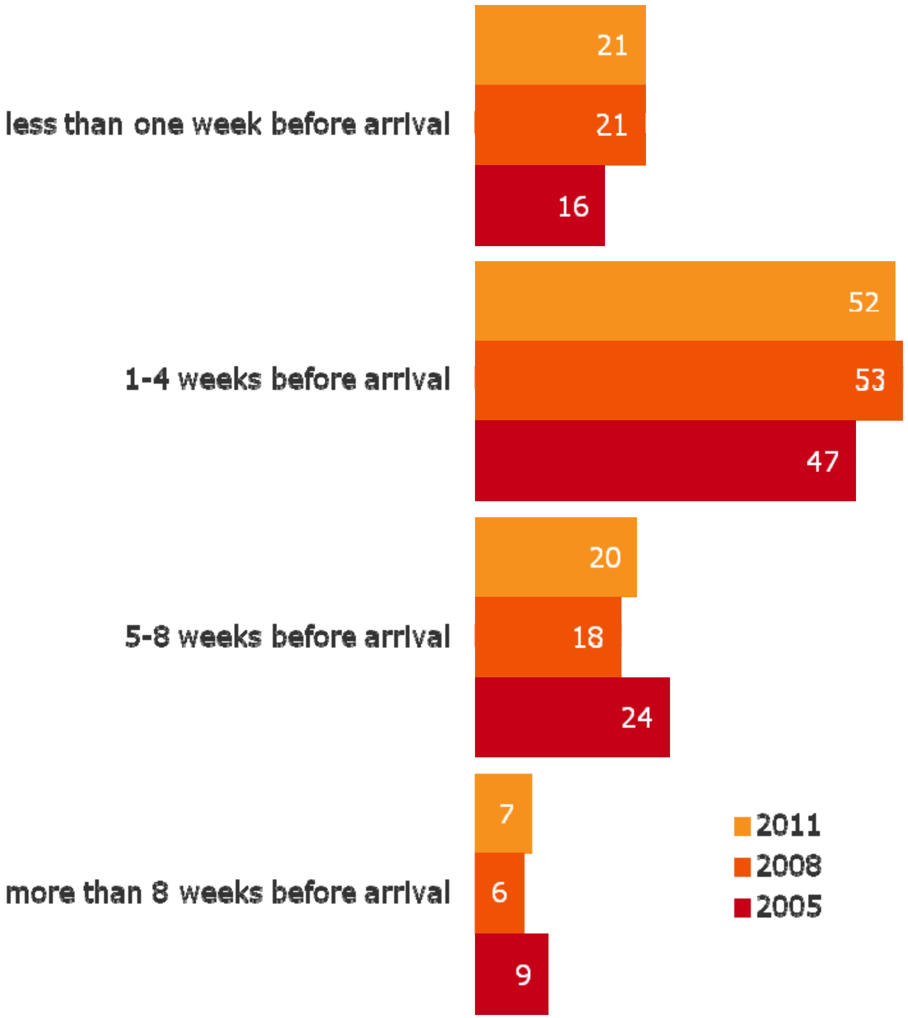
% of all visitors who have spent at least one night in Tallinn during their trip; who booked accommodation and spent the night at an accommodation establishment, n=929



Time of booking accommodation

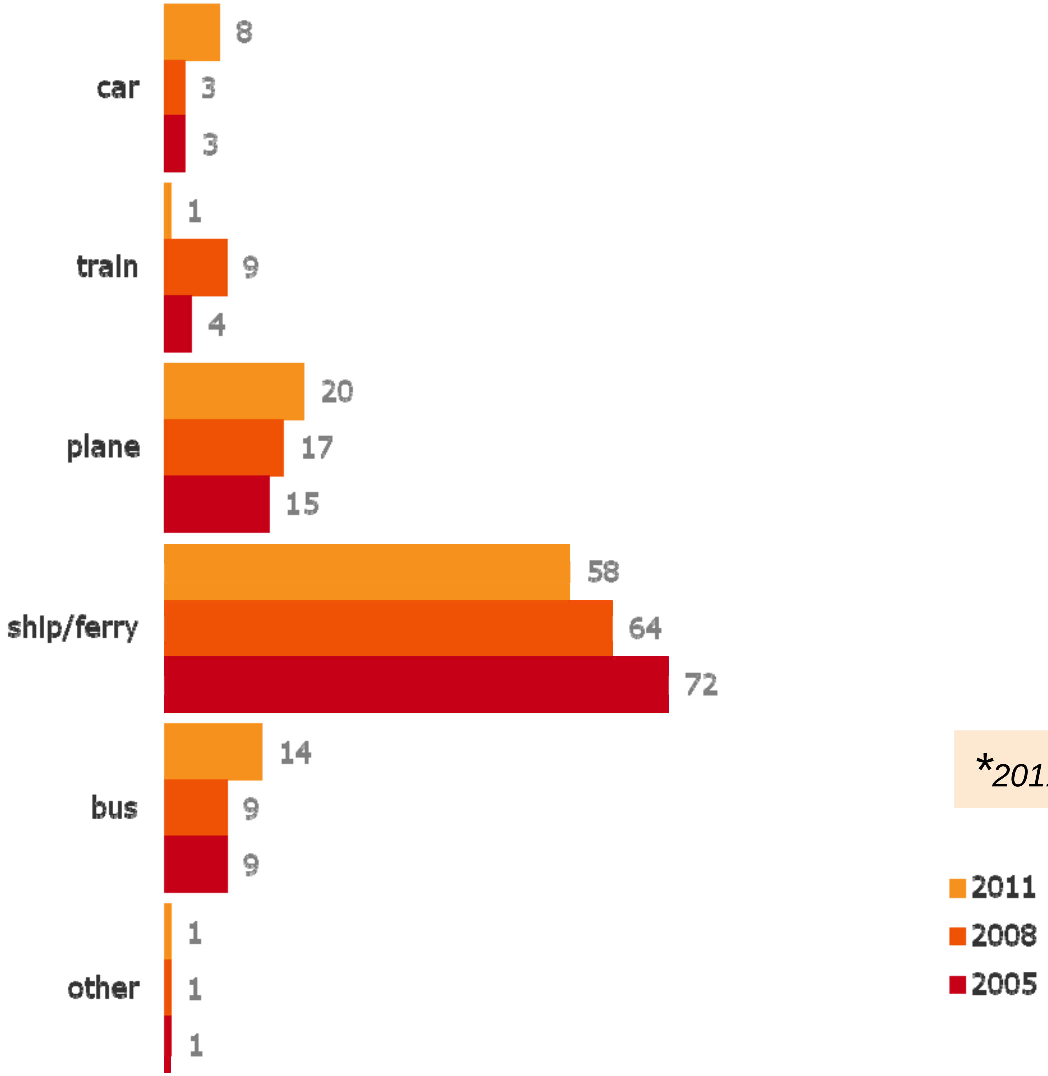
Time of booking has remained similar to 2008

% of all visitors who have spent at least one night in Tallinn and who booked accommodation before arriving in Tallinn, n=887



Transport used to arrive in Tallinn
Ship/ferry is the main, but losing its position

% of all visitors, n=1522



**2011 bus = 2008 bus line + private bus*

Summary (1)

- Regarding information sources on Tallinn, the following aspects were explored: the spread of information sources, (in other words the proportion of usage among foreign visitors) and the evaluations of those who had used the source and the impact it had had while making the decision to visit Tallinn. The most widespread source of information on Tallinn was an earlier visit since the proportion of repeat visitors is still very high – 80% of foreign visitors. The second most important source of information mentioned was recommendation by friends/acquaintances and this tendency is the same among all target countries. Cheap holiday packages (special offers) as well as Tallinn tourism web (www.tourism.tallinn.ee) and articles on Tallinn in different channels are also strong motivators. Social media is currently not yet a competitive channel either by its spread or influence (the latter is probably due to the content it offers on Tallinn).
- As expected, for those who come from Finland, the main source of information is an earlier visit and recommendations by friends-acquaintances have a strong influence on those who come from Russia. Holiday packages have also a strong impact on Russian visitors. Visitors from the United Kingdom rely on travel guides and articles in print media and internet more than the average. Visitors from Russia mentioned substantially less Tallinn´s active marketing channels (information brochures, all listed internet or other media sources, travel agencies, etc).
- Compared to previous years the proportion of first-time visitors (20%) is the largest in 2011, as well as the proportion of those who have visited Tallinn 10 or more times. Among first-time visitors, tourists from Germany accounted for 16%, from the United Kingdom 12%, from Spain 10% and other (those outside the 8 target countries) for 45%.
- First-time visitors mention and are influenced by recommendations from friends/acquaintances, travel guides and articles in magazines or the internet more than the average. Internet-based travel portals and forums, homepages (but not social media), brochures and information leaflets as well a cheap holiday packages make a stronger than the average impact (but have an average spread) for this target group.
- First-time visitors concentrated on sightseeing and museums more frequently than the average, but they comprised less of those who had heard of the Culture Capital 2011 title and in terms of the decision to visit Tallinn, the events associated with this title was estimated to have had a stronger impact on first-time visitors than other visitors.

Summary (2)

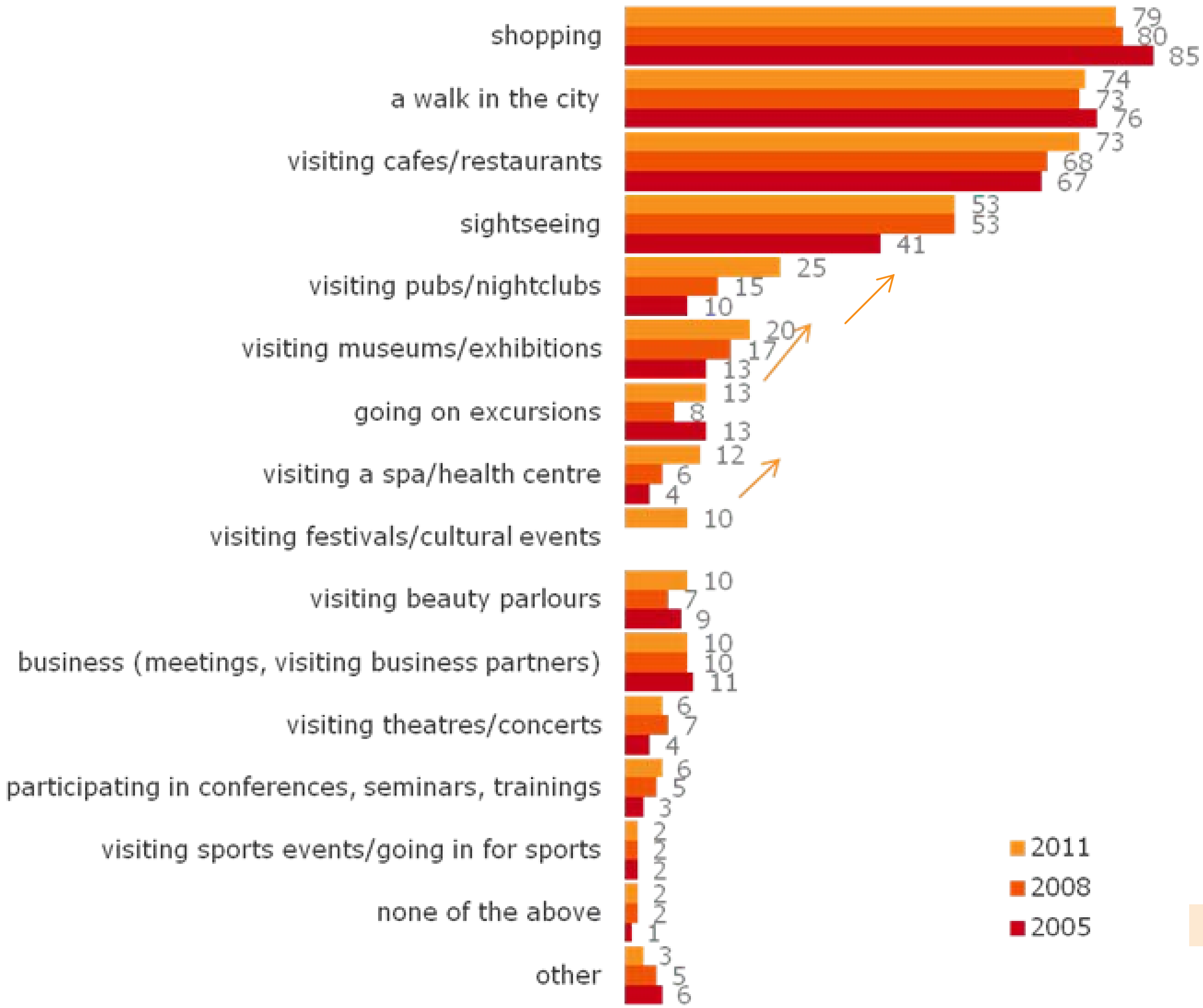
- Just like before, nearly all foreign visitors book accommodation already before arriving in Tallinn. The booking period grew shorter between 2005 and 2008 and for the current survey the results remained at the 2008 level.
- Unlike foreign visitors from farther countries (primarily Norway, Denmark, Germany), our neighbours from Finland and Russia do not book accommodation longer ahead.
- The 2011 survey is remarkable, because for the first time internet had become the main channel for booking accommodation (36%) compared to using a travel agency (31%). Internet as a booking channel is mostly used in farther and not in neighbouring countries. German tourists use the services of a travel agency more often than the average and visitors from Russia mainly rely on help from friends/acquaintances.
- Just like in previous years, the main way of transport to arrive in Tallinn was a ship or ferry, but throughout all the years this proportion has been substantially decreasing. However, arrival by plane is gaining precedence. Compared to year 2008, the proportion of those who arrived by a bus and car has also increased.
- In order to arrive in Tallinn the airplanes are foremost used by visitors from farther countries. As expected, our neighbours from Latvia and Russia come by car or bus and those from Finland arrive by ship. Those arriving by train come from Russia, but their proportion has decreased as other means of transport become more prevalent.

3.4

Foreign visitor to Tallinn 2005–2011
(excl. cruise and turnaround tourist)
Visit and impressions

Activities in Tallinn:
activities in Tallinn are more versatile than before

% of all visitors, n=1522

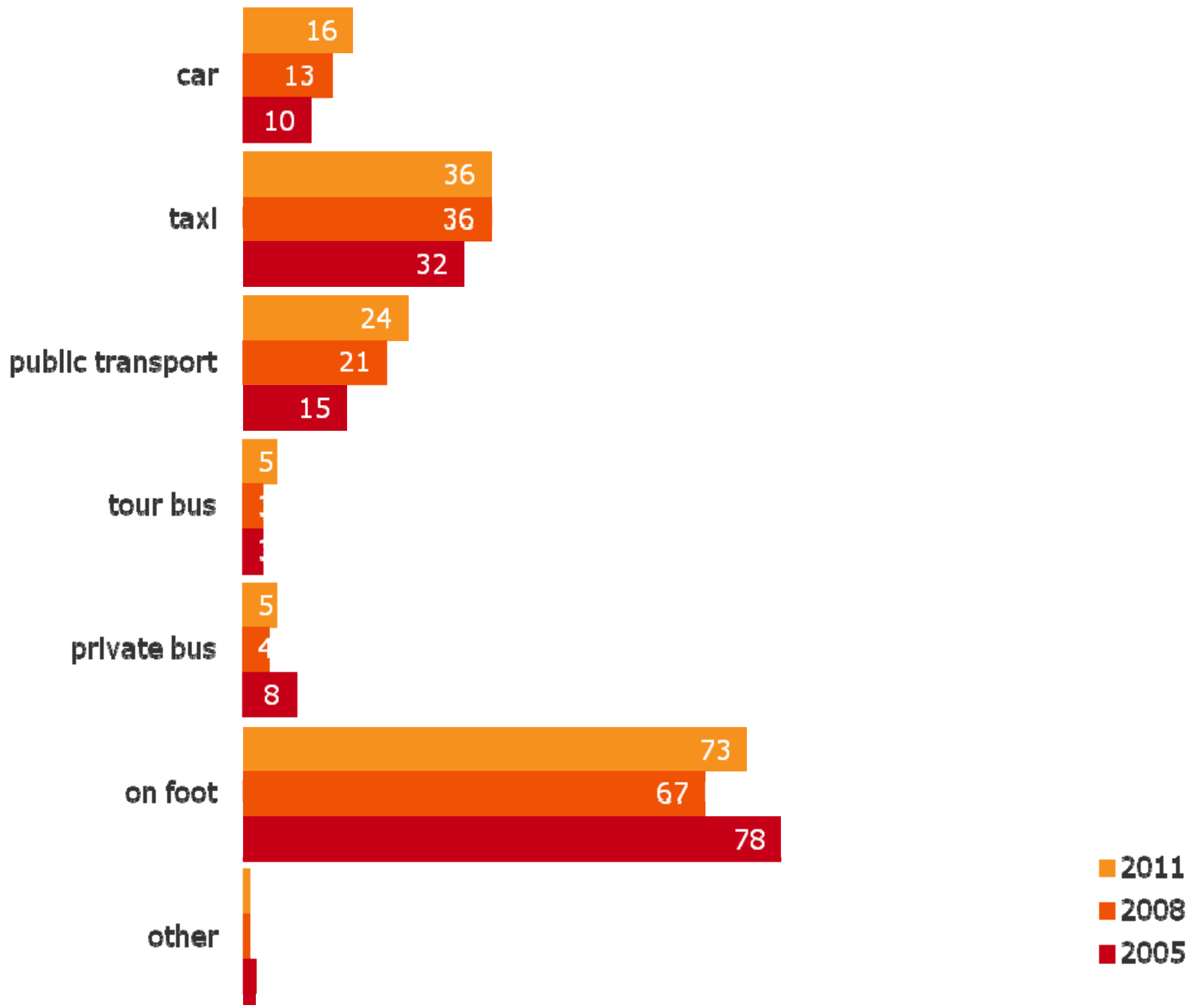


***2011 visiting festivals/cultural events was added**

Transport used in Tallinn

moving around on foot is primary, but the proportion of those using a car or public transport is increasing

% of all visitors, n=1522



Areas visited in Tallinn

The old town and city centre are still primary, Kadriorg and Rocca al Mare have gained visitors

% of all visitors, n=1522

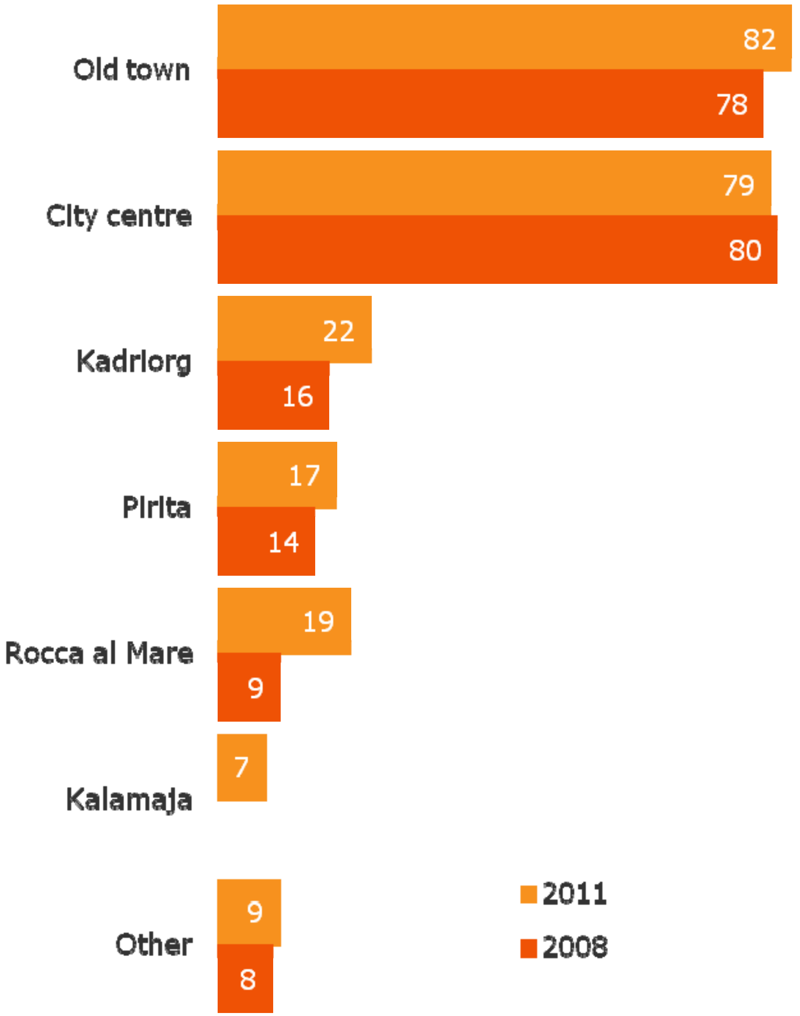
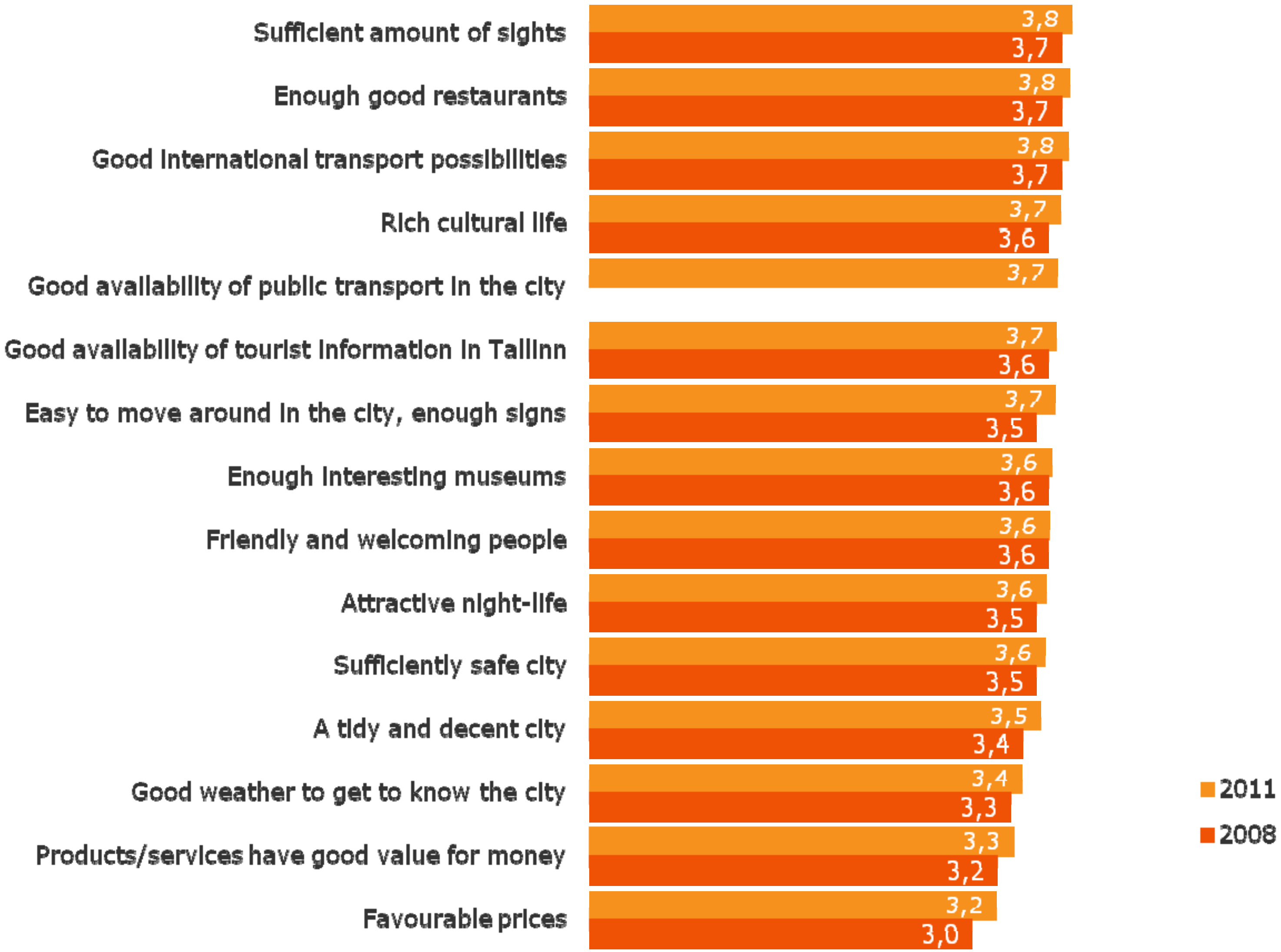


Image of Tallinn (1)

Evaluations have increased for 12 image components out of 15

Average evaluations on a 4-point-scale, where 1=minimum and 4=maximum, n=1522



Service culture in Tallinn

Evaluations to service culture have increased

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

Positive and negative sides of Tallinn
open-end comments of foreign tourists

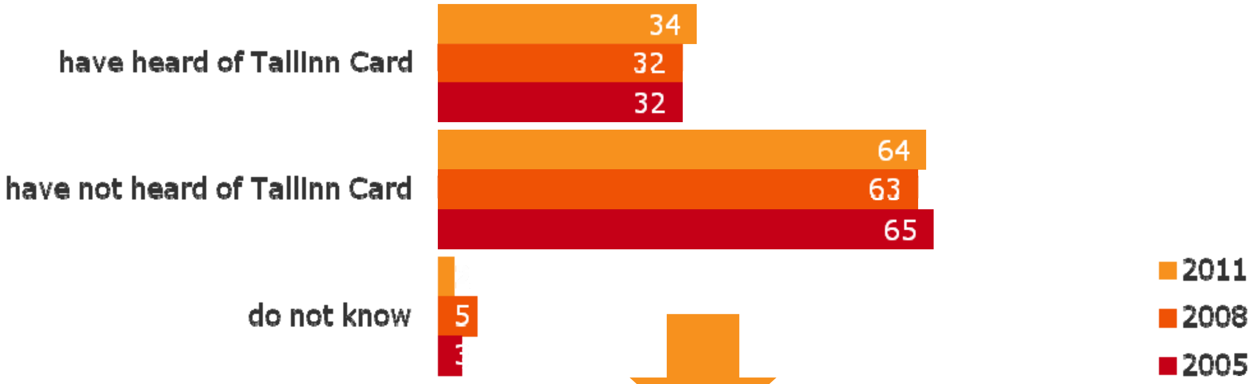
The following summarizes the respondents´ open-end comments to questions ...

Would you like to comment on Tallinn – something you are very satisfied with or what was the most positive thing in Tallinn? /65% or 947 respondents who replied/	***Would you like to comment on something that you are dissatisfied with or something that could be better in Tallinn?*** /46% or 601 respondents who replied/
The old town and its parts (21% of mentions)	Cannot say – nothing negative (16%)
Positive experience with Estonians (7%)	Dirty or slippery streets (5%)
Restaurants, bars (4%)	Unfiendly service staff (4%)
Hotels, spas (4%)	Traffic, few traffic lights, roads for the disabled, parking (2%)
Cheap prices (3%)	Prices have increased (3%)
Shops, shopping centres (2%)	Language problems (2%)
Cultural events, -facilities, -centres (1%)	Hotels (1%)
Nightclubs, casinos (1% or 16 respondents)	Dirty public transport (1%)
The following were mentioned 10-4 times: beautiful nature, Freedom Square, Kadriorg, Pirita, Tallinn city parts, port/airport	Not safe, pickpockets (1%) Occasionally (10-4 times) the following were mentioned: Expensive public transport, no toilets, communist-time buildings, cold or bad weather

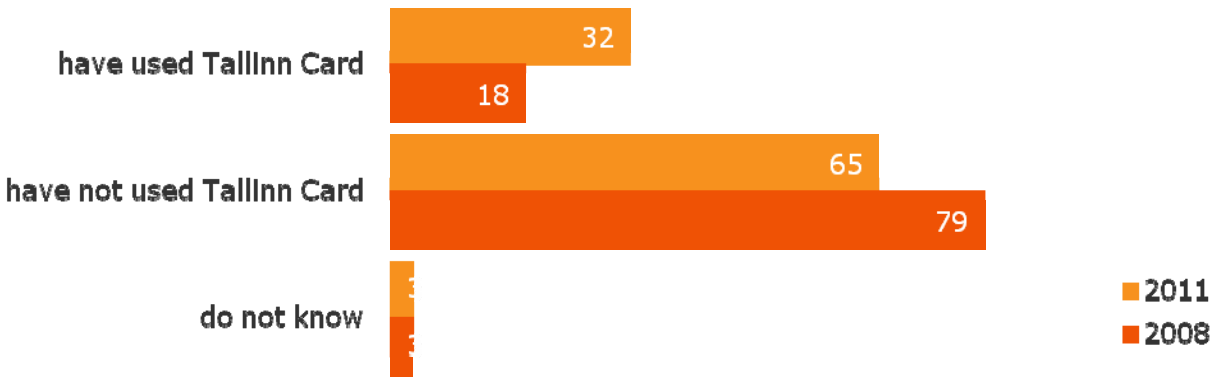
Information on Tallinn Card and its usage

Awareness of the Card remains at the same level, but the number of those who had used the card has significantly increased in 2011

% of all visitors, n=1522



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

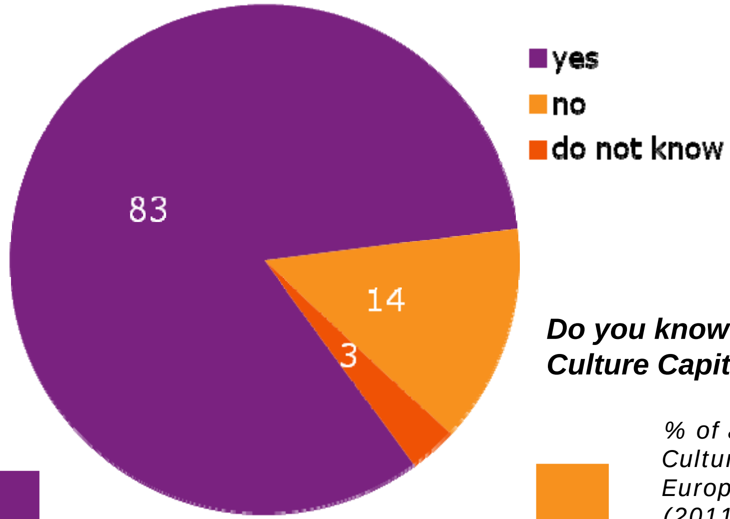


Title of European Culture Capital

73% of foreign visitors knew that Tallinn is Culture Capital 2011

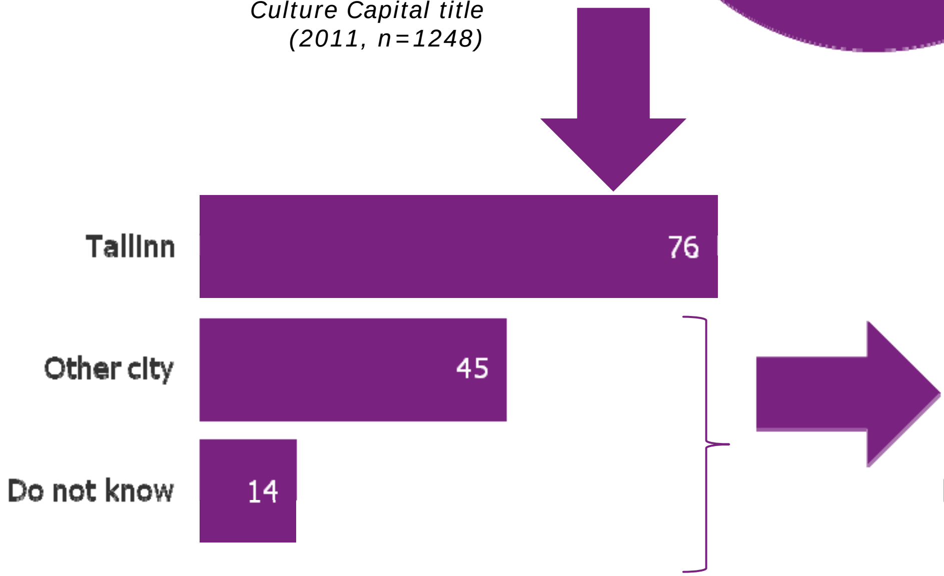
% of all visitors, n=1522

Have you heard that every year at least one European city owns a title "European Culture Capital"?



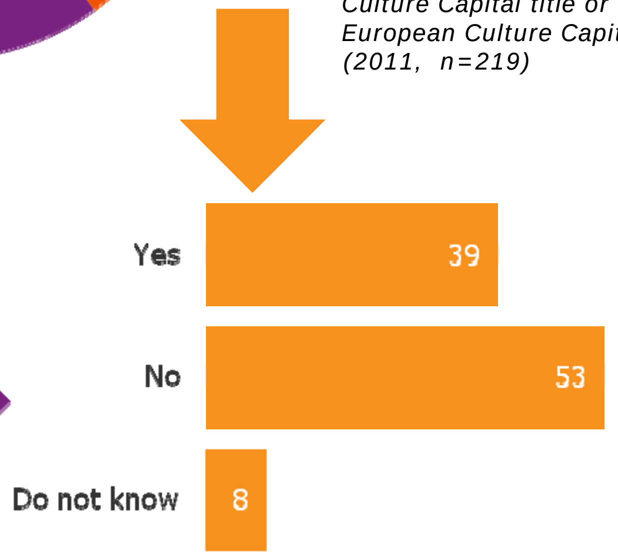
Can you name which city or cities are the European Culture Capital(s) in 2011?

% of all visitors who have heard of the European Culture Capital title (2011, n=1248)



Do you know or have you heard that Tallinn is European Culture Capital in 2011?

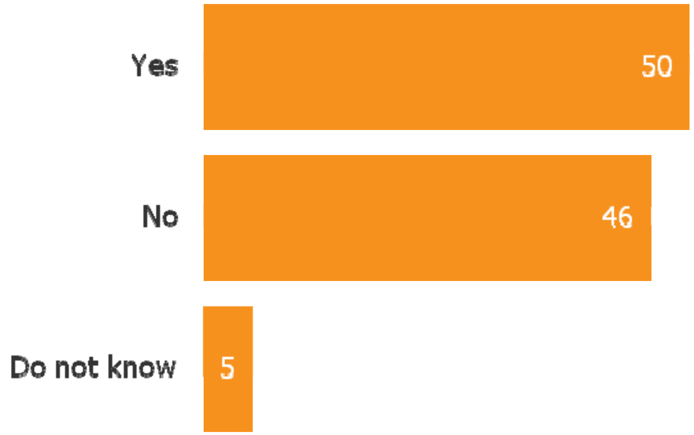
% of all visitors who did not know about the European Culture Capital title or who did not name Tallinn as European Culture Capital 2011 (2011, n=219)



Tallinn 2011 European Culture Capital logo

Only half of the visitors had seen the logo of Culture Capital

% of all visitors, n=1522



The events of Tallinn 2011 as European Culture Capital and their influence on visiting Tallinn

The events influenced the decision of 16% of foreign visitors to Tallinn

% of all visitors who knew or had heard that Tallinn is Culture Capital 2011, n=1146

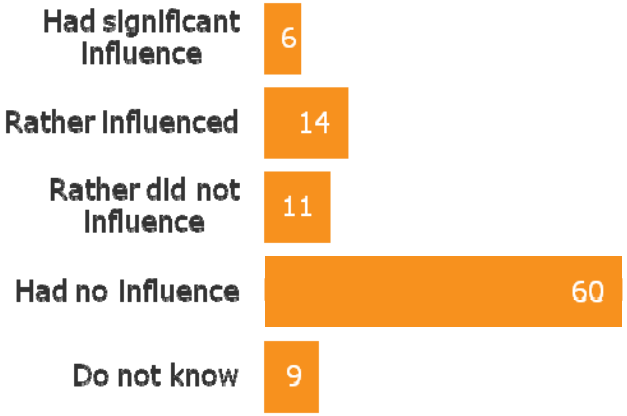
Did you visit any events part of a Tallinn 2011 European Culture Capital program?

% of all visitors who knew or had heard that Tallinn is Culture Capital 2011, n=1146

****Of all foreign tourists, 13% took part in an event within the Culture Capital project and 12% took part in an event in the 3rd or 4th quarter.***

How much did the events held as part of European Culture Capital 2011 influence your decision to visit Tallinn?

% of all 3rd and 4th quarter visitors who knew or had heard that Tallinn is Culture Capital 2011, n=697

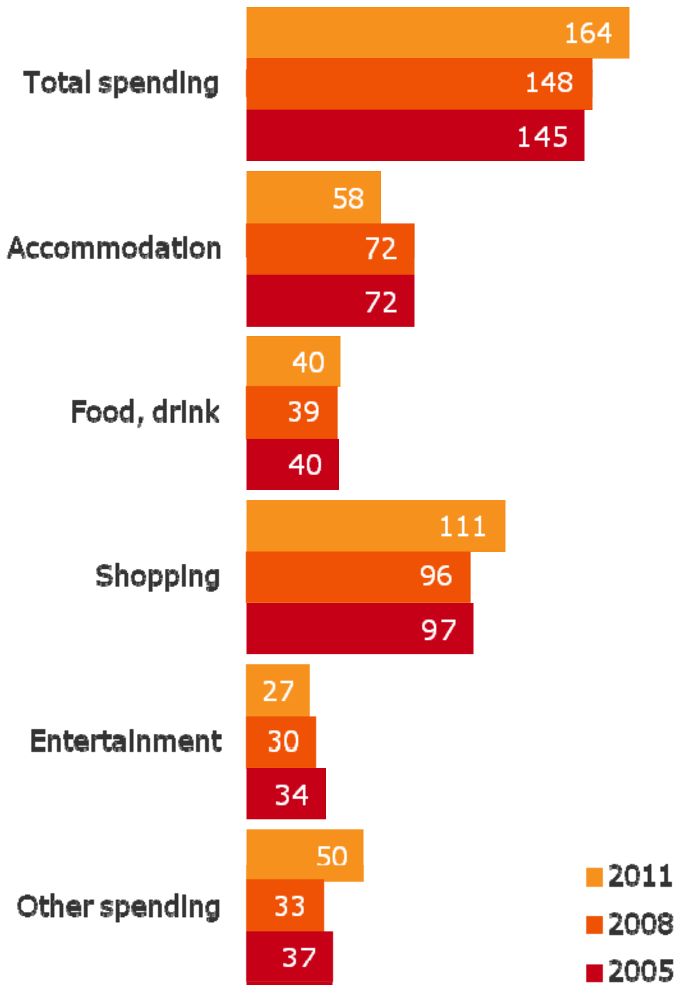


****The events within the Culture Capital project directly or indirectly influenced 16% of all foreign tourists´ decision to visit Tallinn in the 3rd or 4th quarter.***

Average spending per person per day

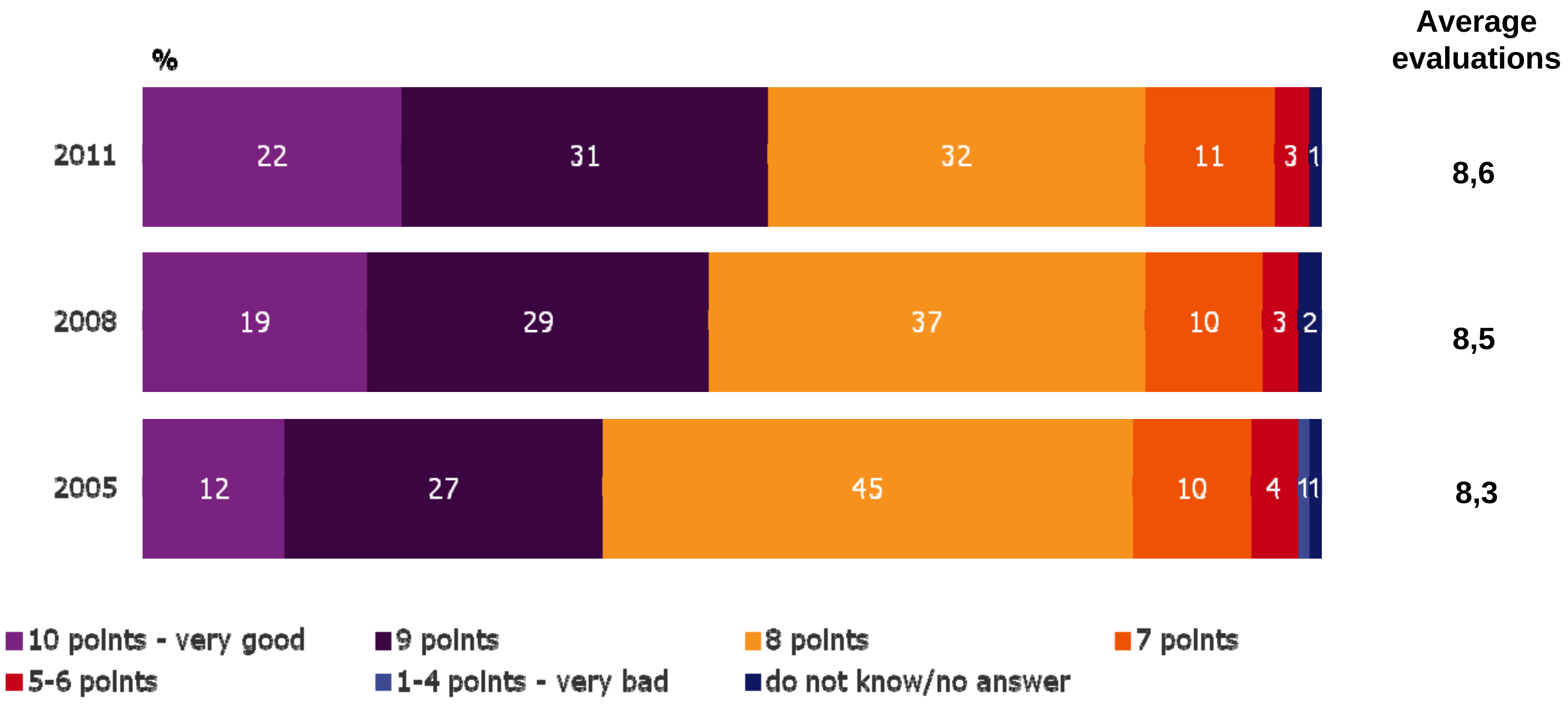
Spending on shopping is increasing, on accommodation decreasing

Average spending per person per day in EUR



Evaluations of overall impression on trip to Tallinn
Overall impressions are increasing constantly and steadily

% of all visitors, n=1522



Likelihood of visiting Tallinn again

Despite high overall evaluations, intent to revisit Tallinn has not increased

% of all visitors, n=1522

**In the 2005 survey, the wording of the question was somewhat different*

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

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

Recommendation communication

Most foreign visitors would definitely continue to recommend visiting Tallinn to their friends

% of all visitors, n=1522

Summary (1)

Activities in Tallinn are more versatile and spending is increasing

- Just like in previous years, most foreign visitors to Tallinn walk, shop and eat/drink, but the proportion of those visiting restaurants, pubs/nightclubs and spas is increasing constantly. For the first time, the proportion of those taking part in festivals/cultural events reached 10%. Thus, one may say that the activities of foreign visitors have become more versatile thanks to the possibilities listed above as well as marketing.
- In 2011, 58% of foreign tourists were at least once in the so-called role of a culture consumer (i.e. they went sightseeing, visited museums, excursions, festivals, theatres or concerts). They involve a significantly above average proportion of first-time visitors and they come from Germany, united Kingdom, Latvia and other countries outside the list of target countries.
- 18% of foreign tourists used beauty and spa services and more frequently than the average by the visitors from Finland, Norway, Denmark and Sweden as well as by those who are on a repeat visit to Tallinn.
- 14% come for business or conference activities and considerably often than the average they come from Latvia.
- The proportion of those who went shopping in Tallinn is the largest among the visitors from Finland(87%).
- Total spending of foreign visitors (including accommodation) per person per day is 164 EUR, which is 16 EUR more than three years ago. Spending on accommodation per person who have spent money has slightly decreased and spending on shopping and other items has increased.
- In 2011 foreign visitors to Tallinn spent an estimated sum of 580 – 685 million EUR and cruise and turnaround tourists spent an estimated sum of 13 -20 million EUR.
- The favourite places of interest for foreign tourists are the old town and city centre, which most tourists have visited. The proportion of tourists visiting Rocca al Mare, Kadriorg and Pirita has increased. First-time visitors usually embrace a wider area of Tallinn than repeat visitors. Tourists from Finland, Sweden and Russia are less active than the average while visiting other areas in Tallinn.
- Because the area visited is wider and because tourists also arrive in Tallinn by a personal car, moving around in a car and public transport has become more frequent. Taxi is used by nearly every third tourist and this proportion has not changed since 2005.

Summary (2)
Tallinn as Culture Capital 2011

- Finnish tourists were more aware of the tradition of selecting European Culture Capitals (this is probably because of the Turku-campaign). The least aware of the tradition were the visitors from Russia (only 56%); first-time visitors to Tallinn and those from Denmark/Norway were also below average aware of the event.

- Relatively more tourists from Latvia and Germany were able to name Tallinn as the Culture Capital and they also participated more frequently than the average in the Culture Capital events. Finnish tourists were the most passive in participating in the events (only 5%), but the proportion of Finnish visiting the events was still the largest (18% of foreign visitors).

- All in all, 72% of visitors were aware of Tallinn´s status as European Culture Capital. According to the respondents´ knowledge, an estimated 233 - 341 thousand foreign tourists visited the events of the Culture Capital.

- 13% of foreign tourists who visited Tallinn claimed that their decision to visit Tallinn was more or less influenced by Tallinn´s status as European Culture Capital.

Summary (3)

Impression of Tallinn and satisfaction with service has improved significantly. Willingness to recommend and likelihood of repeat visit still remain high

- Evaluations to the general impression of the trip to Tallinn are still increasing: 53% of visitors gave it 10 or 9 points on a 10-point-scale. 22% of visitors, including those who came for the first time, but also those from Sweden, Russia and other target countries outside the 8 largest countries) gave the maximum of 10 points. Visitors from Finland mostly gave 8 points out of 10.

- Evaluations of foreign visitors have improved in all aspects of service culture. 12 image components out of 15 were highly valued, which can be considered a great achievement. Even when there were negative comments, those relatively more concerned the cleanliness of streets and traffic/sidewalks, but also impolite service staff.

- High satisfaction evaluations also indicates willingness to recommend Tallinn as a travel destination to a friend (98% would recommend and out of those 72% would definitely and 26% would probably recommend).

- Despite the increased satisfaction and willingness to recommend, the intent to revisit Tallinn has remained the same (89% consider visiting Tallinn probably again in the coming 5 years). The reason for this is probably the very high level (91%) achieved by year 2008.
- Relatively more first-time visitors, tourists from Germany and the total of visitors from other countries consider a revisit unlikely (7% on the average), – almost every thirds thinks it is unlikely that they will visit Tallinn again in the coming 5 years.
- Those who are definitely planning to revisit Tallinn account for 62% and they come from Finland and Sweden (82% and 75% respectively) more often than the average.

4

Summary

General summary (1)
foreign visitor to Tallinn 2011

- In Total 2.72 million foreign tourists visited Tallinn, which is 3% more than in 2008. Of all the visitors, 16% accounted for cruise and turnaround travellers, 27% for other one-day visitors, 49% stayed the night at accommodation establishments and 8% at friends/relatives.
- Just like before, foreign visitors (excl. cruise and turnaround tourists) came mostly from Finland, but their proportion has been decreasing year by year and they accounted for 50% of all foreign visitors to Tallinn in 2011. The largest increase can be seen among visitors from Russia (from 8% to 13%).
- The foreign visitor to Tallinn is getting younger and the proportion of pensioners and those travelling alone is decreasing.
- The main purpose for the trip is still a vacation, but the proportion of one-day visitors has increased over the past three years: every 5th tourist in 2011.
- The proportion of first-time visitors as well as those who have visited Tallinn 10 or more times has also increased (20% and 37% respectively).
- The number of foreign visitors who have spent at least one night away from home during the trip has again begun to rise (now 88%) and this number, in its turn, includes more foreign visitors who spent the night in Tallinn (78%). The proportion of those who book accommodation beforehand and the length of time they book accommodation ahead has remained the same, but the channels of booking have changed: for the first time the number of those who make a reservation over the internet (36%) is higher than the number of those who use the services of travel agencies. The number of those who spend the night at mid-range hotels is significantly higher.
- A significant proportion of foreign visitors still arrive in Tallinn by ship, but this trend has been decreasing over years and all other means of transport are gaining prevalence. In addition to moving around on foot in Tallinn, (private) cars and public transport have also become more popular than before because visiting other areas in Tallinn has also gained popularity.
- In addition to recommendations from friends, the most important sources of information are personal experiences, travel guides and articles published in print media and internet. Other internet-based sources (travel portals, homepages, etc) are also important. Social media has not yet gained relevance as a source of information either in terms of scope or influence among the tourists who have arrived here.

General summary (2)
Activities and satisfaction of foreign visitors to Tallinn

- The activities of those who visit Tallinn have become more versatile over the time. In addition to walking, eating-drinking and shopping, other activities have also gained importance. In year 2011, 58% of foreign tourists were at least once the so called consumers of culture, 18% used beauty and spa services, 14% were occupied with a conference or business among other things and 79% shopped, spent time in cafes, bars or nightclubs.

- Total spending of foreign tourists (including accommodation) per person per day has increased and all visitors together (incl. cruise and turnaround tourists) spent an estimated sum of 593-705 million EUR in Tallinn.

- Satisfaction with time spent in Tallinn, impressions of Tallinn and evaluations to services have increased even further. Almost all travellers would recommend Tallinn as a travel destination and ¾ of them would definitely recommend it.

- The intent to visit Tallinn again in the coming 5 years also remains high – 89% are likely to visit Tallinn again.

- Most (73%) of foreign visitors knew that Tallinn was European Culture Capital 2011 and 13% of visitors claimed that this influenced their decision to come to Tallinn to a greater or lesser extent. According to their own knowledge, an estimated number of 233-341 thousand visitors attended the events of the Culture Capital.

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Appendices: sample and contacts

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)

- The sample of the survey is based on quota sampling. The quotas include the country of origin of the respondent, place of conducting the interview (or the "exit gate" from Tallinn) and the proportion of cruise voyagers.
- Here follows the division of planned and actual sample in accordance with countries and "exit gates" (H – harbour, A – airport, L – land).

Planned sample (2011)

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

Actual sample (2011)

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

Data collection

- The survey was conducted in a 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	
before 12.00	294
12.00 - 14.00	414
14.00 - 17.00	567
after 17.00	407

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

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

Comparison of weighed and unweighed samples 2011, no cruise voyagers						
	Evaluation to overall population	% of population	Weighed results	% of weighed sample	Unweighed results	% of unweighed sample
Finland	1131570	50%	729	50%	399	26%
Sweden	107982	5%	70	5%	209	14%
Norway	53066	2%	34	2%	131	9%
United Kingdom	79888	4%	51	3%	144	9%
Germany	92524	4%	59	4%	143	9%
Russia	299146	13%	193	13%	209	14%
Latvia	76025	3%	49	3%	99	7%
Spain	32162	1%	21	1%	12	1%
Other countries	409064	18%	263	18%	176	12%
Total:	2281427	100%	1469	100%	1522	100%

Generalizations to overall population based on respondents´ spending
Total spending of foreign tourists in 2011 in Tallinn (EUR)

Number of respondents	Average per respondent	Standard deviation	error on 95% confidence limit	Lower	Upper	Population	Average spending (money)	Lower	Upper
FVT (1162)	277,26	396,00	22,77	254,49	300,03	2281427	**632 548 450**	580 602 132	684 494 768
Cruise (130)	37,43	48,00	8,25	29,18	45,68	430796	**16 124 694**	12 570 041	19 679 348
Turnaround (45)	42,19	45,00	13,55	28,64	55,74	7204	**303 937**	206 318	401 555
Total						**2719427**	**648 977 000 €**	**593 378 000 €**	**704 576 000 €**

Further information

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

The client:	Karen Alamets
Project manager of the survey plan and report:	Esta Kaal, Annette Schultz
Sample design:	Mare Lepik
Generalizations to population:	Katre Seema
Questionnaire programming:	Kai Paap
Interview coordination:	Marju Kalve
Data processing:	Kai Paap
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