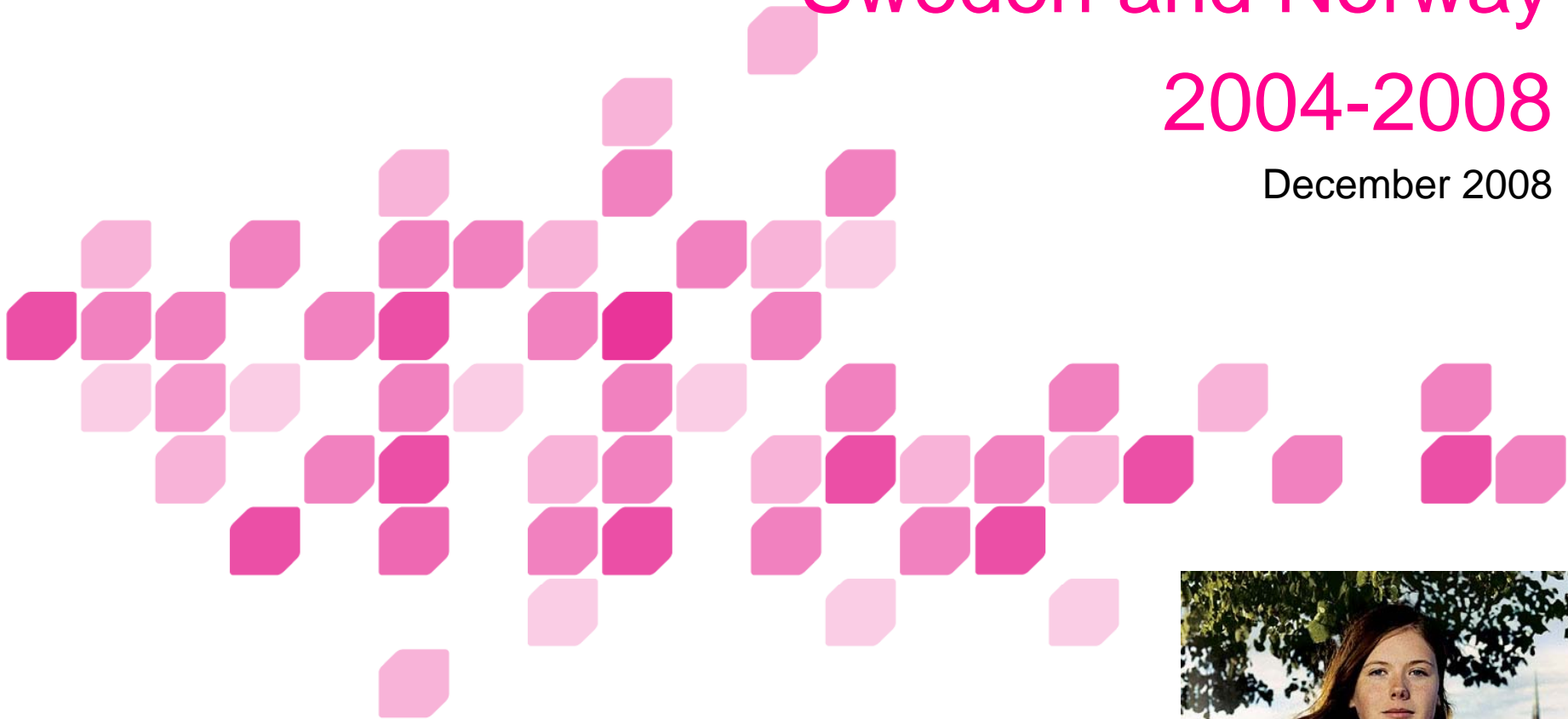


# Sweden and Norway

## 2004-2008

December 2008



# Sample

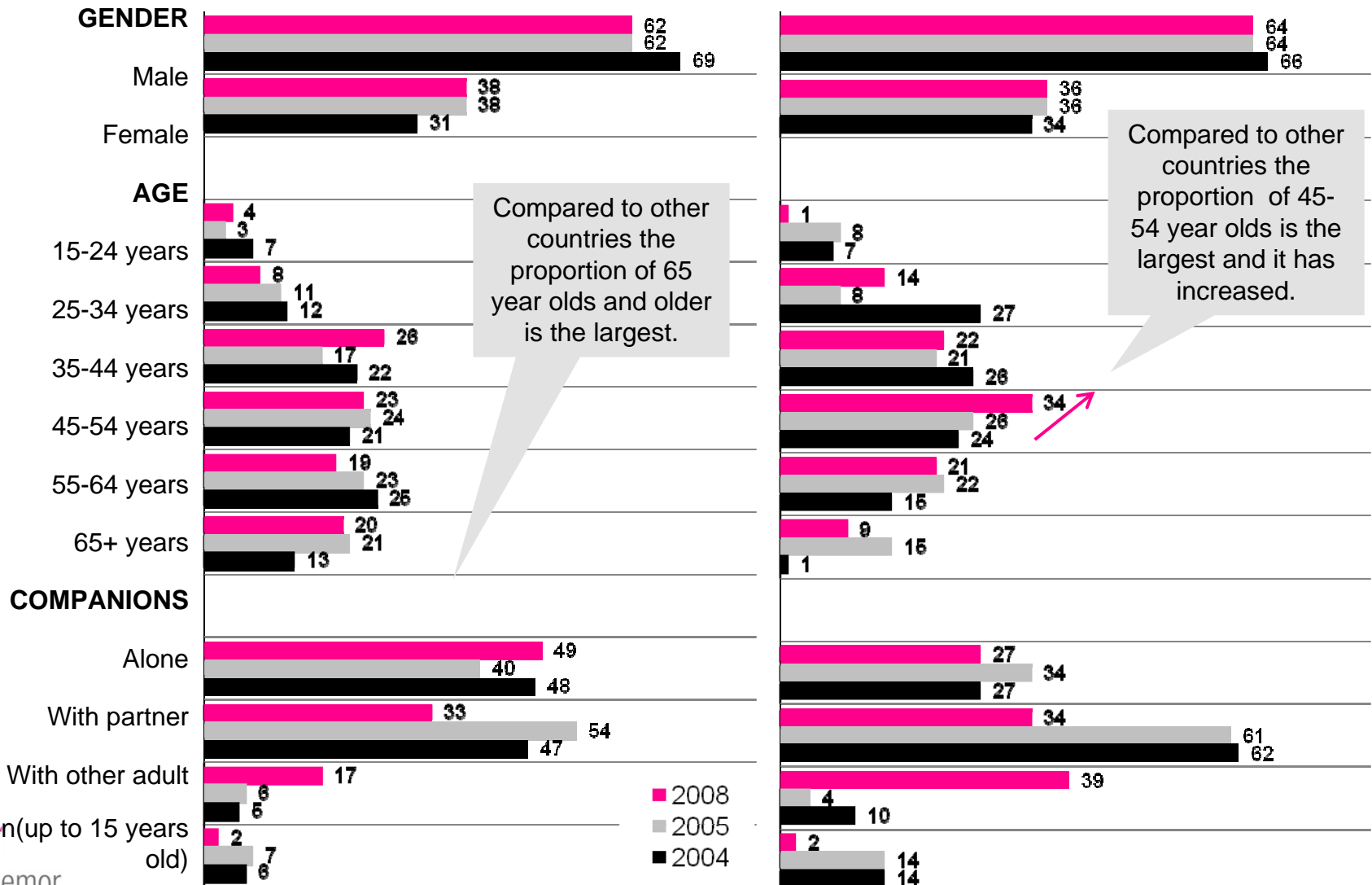
- **Sweden** sample size:
  - 2008 – 253 visitors
  - 2005 – 232 visitors
  - 2004 – 221 visitors
- In 2008 72 % of visitors who had arrived from Sweden were questioned in harbour, 24 % in airport and 4 % in the streets (in 2005 22% in the airport and 78 % in harbour).
- **The proportion of Swedes has slightly dropped:** in 2008 Swedes made up 5%\* of all Tallinn's foreign visitors ( in 2005 6%).
  
- **Norway** sample size:
  - 2008 – 128 visitors
  - 2005 – 89 visitors
  - 2004 - 86 visitors
- In 2008 71 % of the visitors who had arrived from Norway were questioned in airport, 18 % in harbour, 10 % in Ikla checkpoint and 1 % in other places (in 2005 52% in airport, 31% in harbour, 17% in Ikla).
- **The proportion of Norwegian foreign visitors has stayed the same in 2008 and 2005 – 2%\*** of all foreign visitors.
  
- The results in this report are presented according to the weighing methodology I (See Appendix 4)

# Respondent Profile (1)

% of all the visitors who have arrived from a particular country

## Sweden

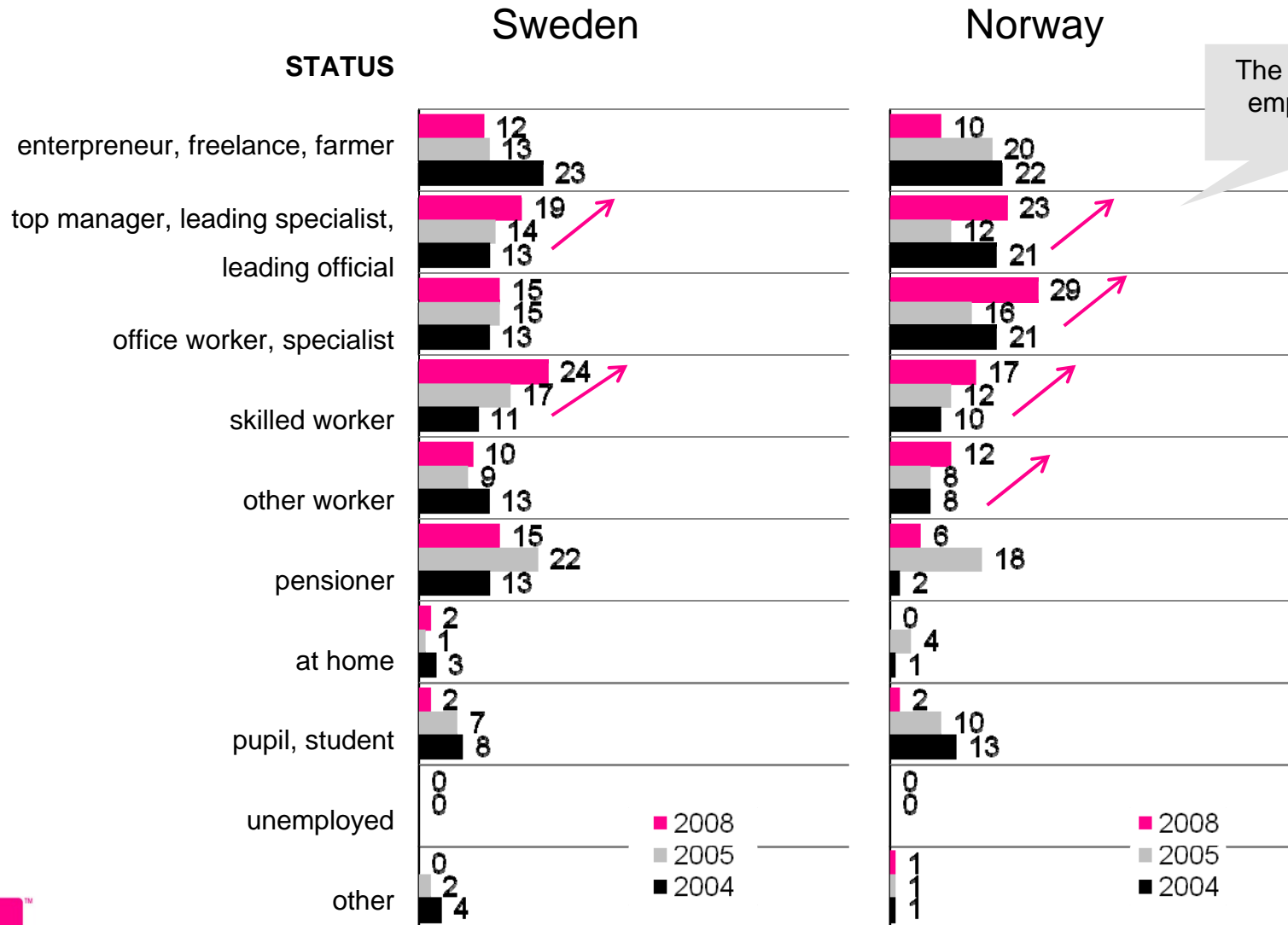
## Norway



children (up to 15 years old)

# Respondent Profile (2)

% of all the visitors who have arrived from a particular country



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## The purpose of the trip and the route

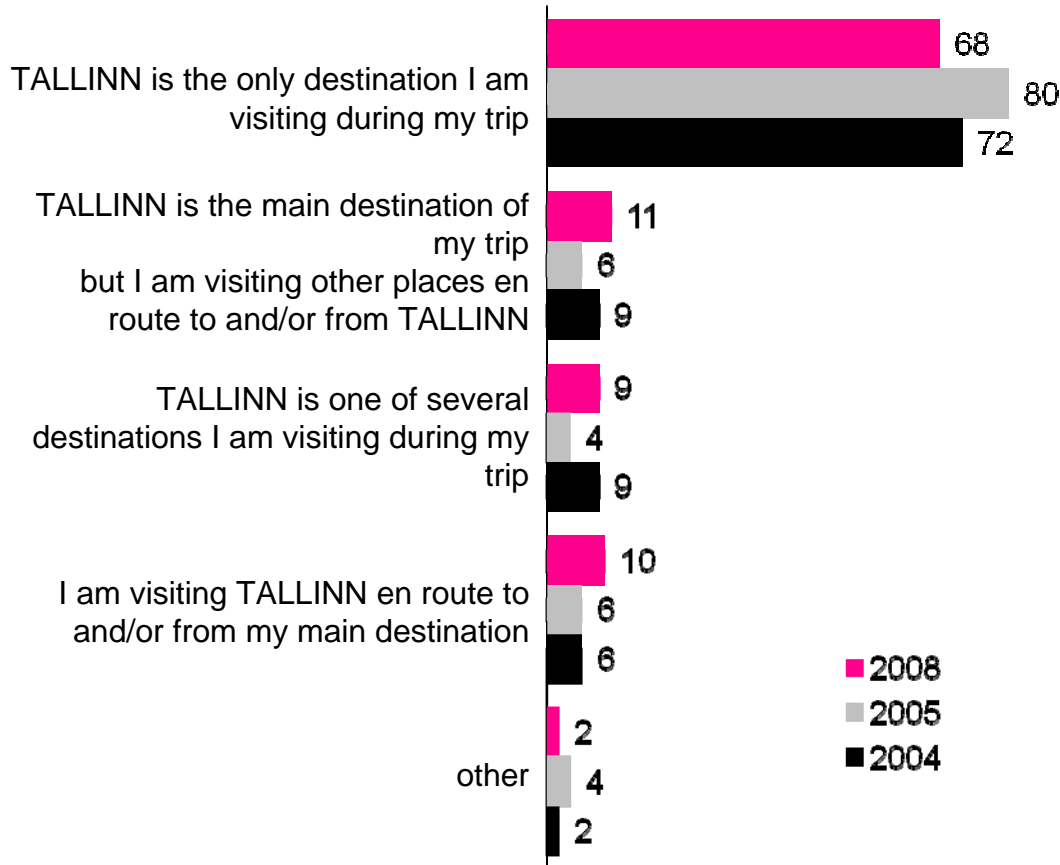
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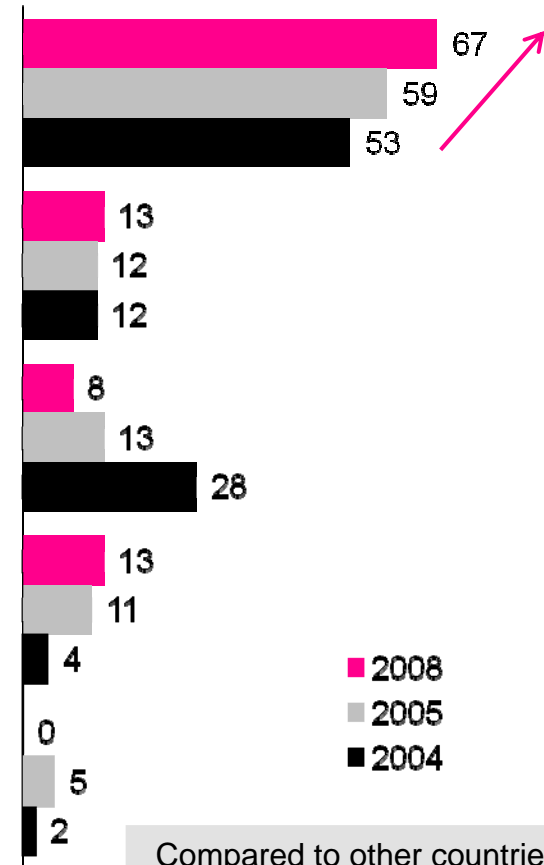
# Tallinn as the holiday destination

% of all the visitors who have arrived from a particular country and who spent at least one night away from home

## Sweden



## Norway



Compared to other countries the proportion of people who visit Tallinn en route is large in case of Sweden and Norway.

# The purpose of the trip

% of all the visitors who have arrived from a particular country

## Sweden

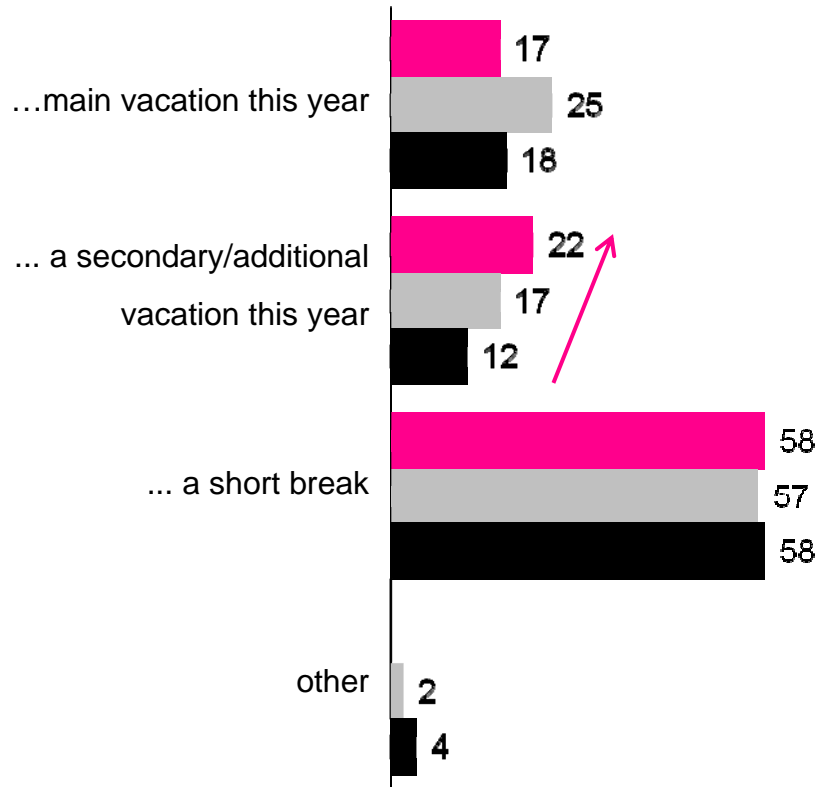
## Norway



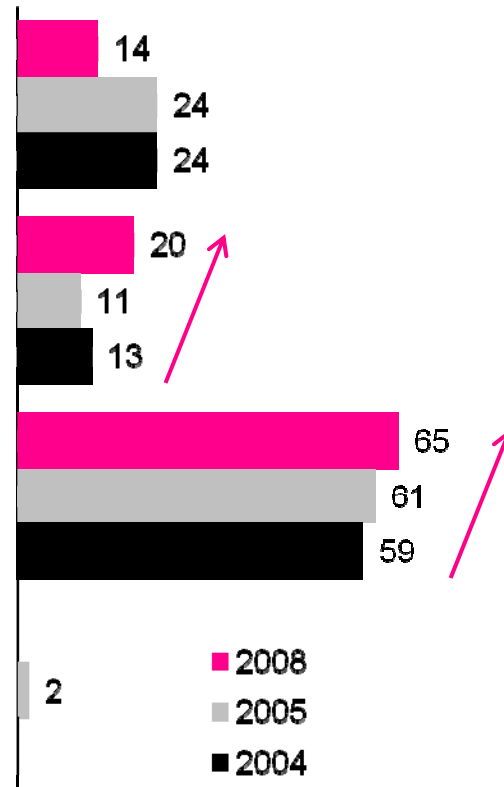
# The meaning of the holiday

% of all the visitors who have arrived from a particular country, who are on a holiday or who visit friends and relatives with the holiday purpose

## Sweden



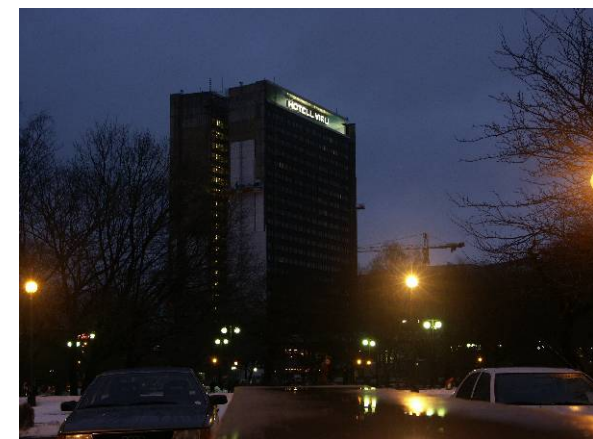
## Norway



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# Staying overnight and accommodation

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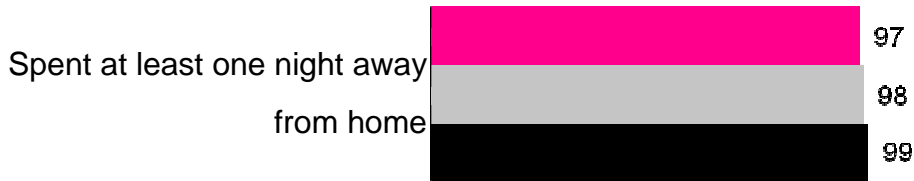


# Nights spent away from home during the trip

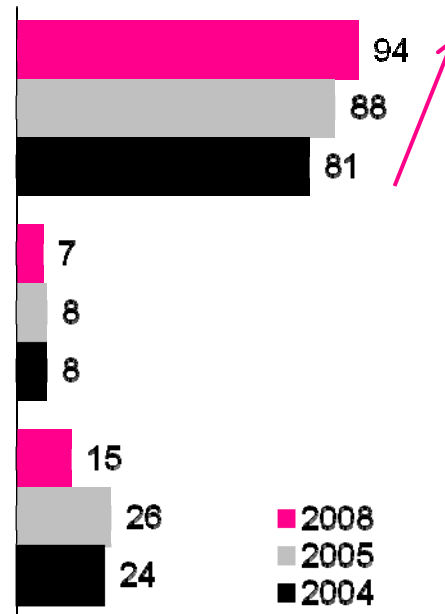
% of all the visitors who have arrived from a particular country

## Sweden

## Norway



%Of all the visitors, who have spent nights away from home

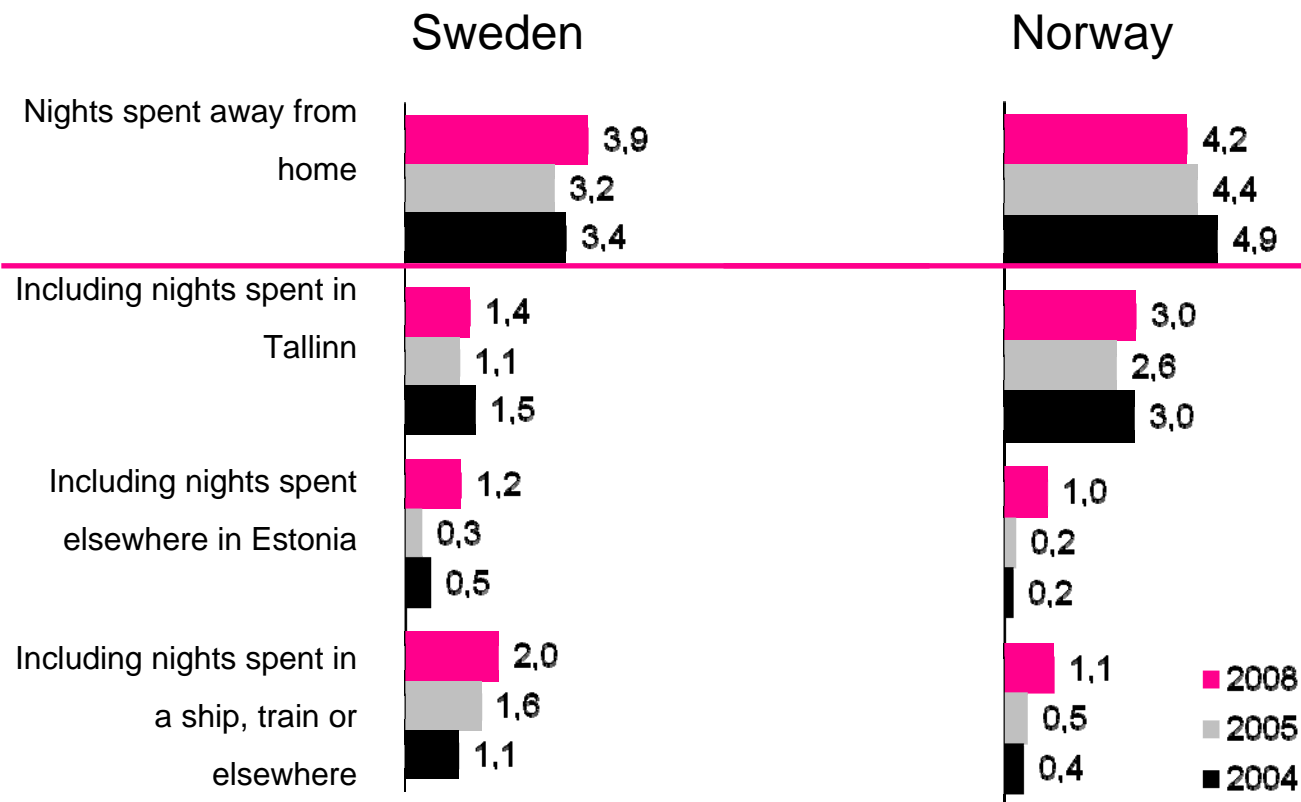


■ 2008  
■ 2005  
■ 2004

# Spending nights away from home

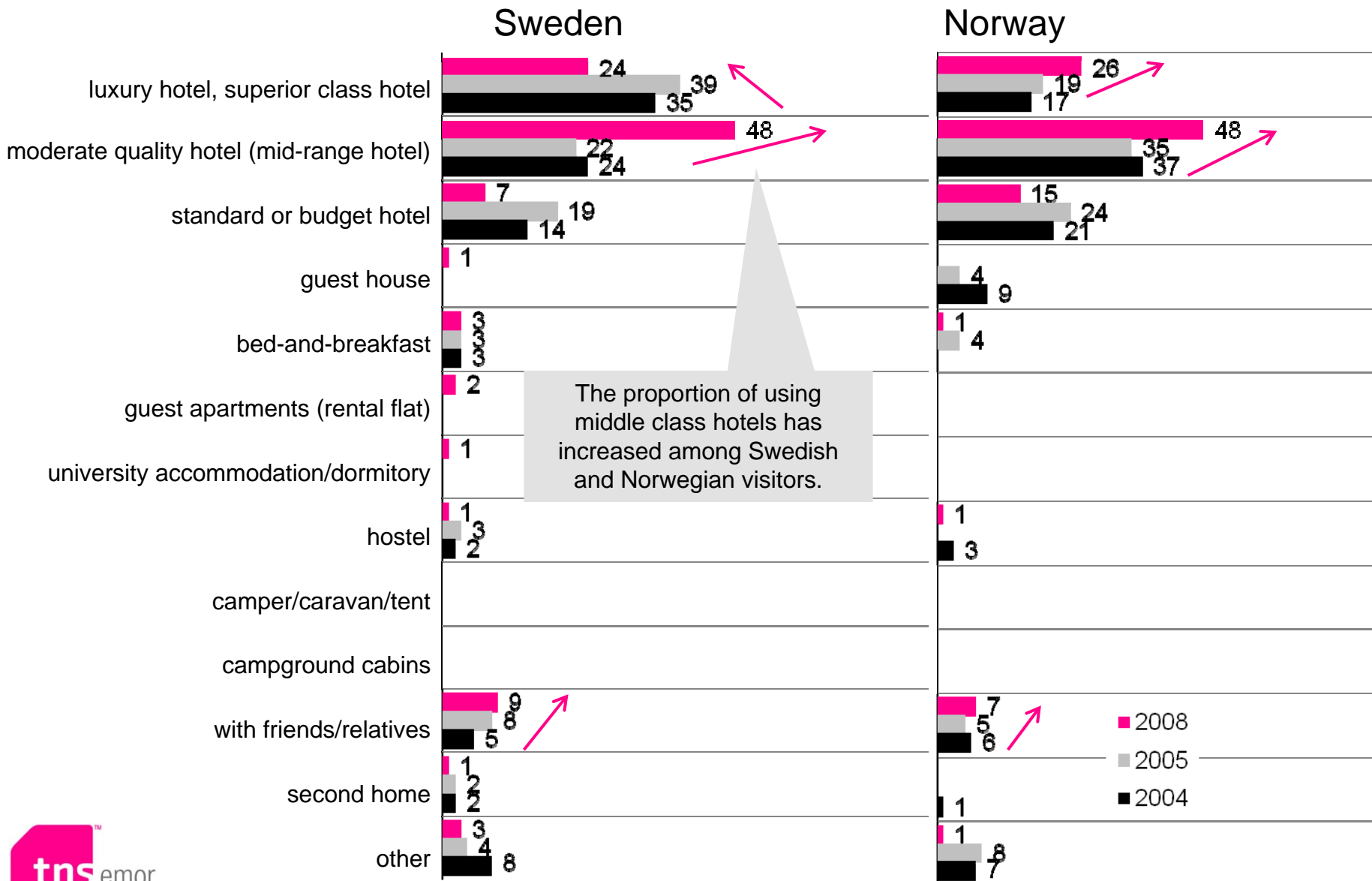
the number of average nights spent away from home

(of all the visitors who have arrived from a particular country, who have spent nights away from home)



# Staying overnight in Tallinn

% of all the visitors who have arrived from a particular country, who have spent at least one night in Tallinn

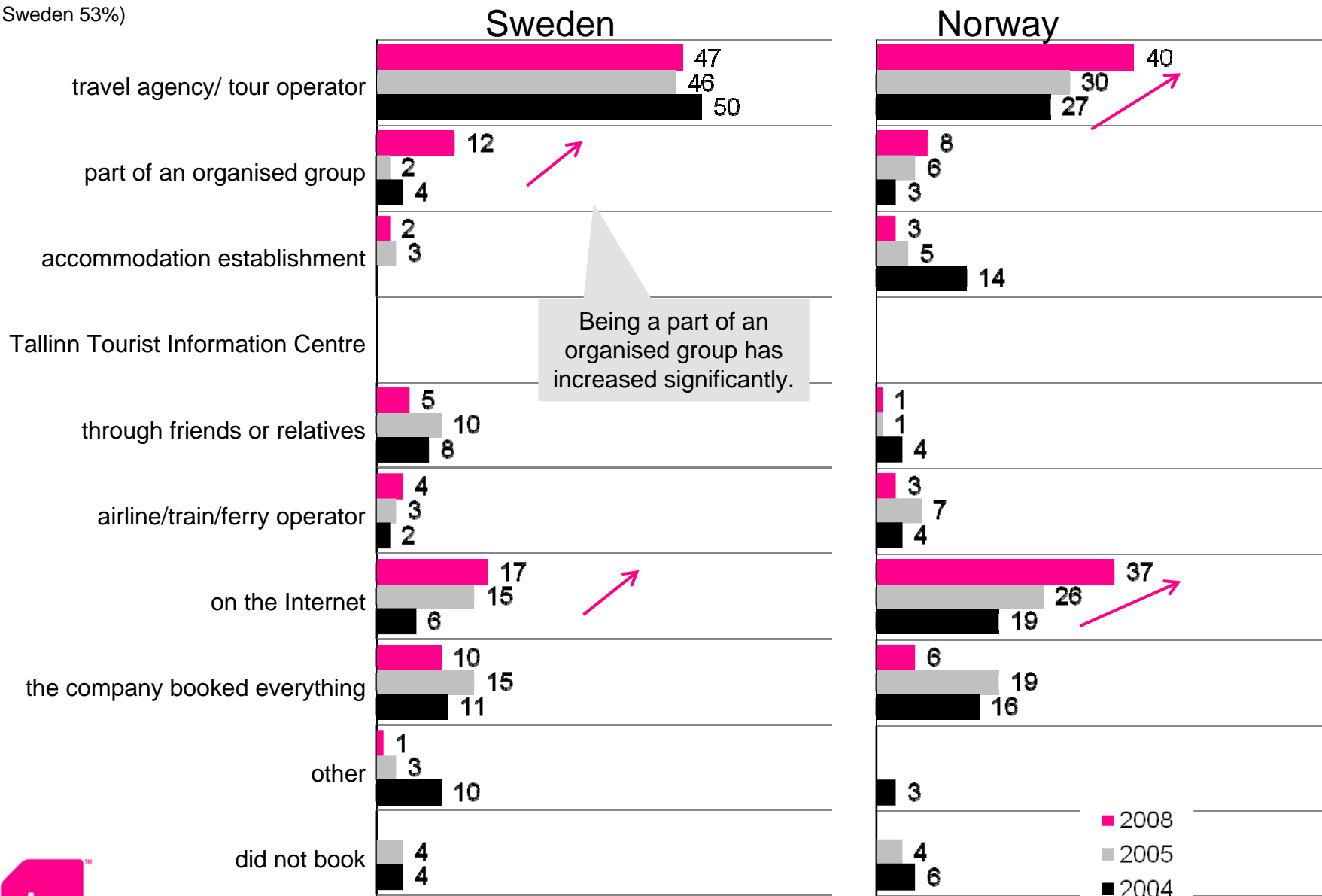


# Before arriving to Tallinn



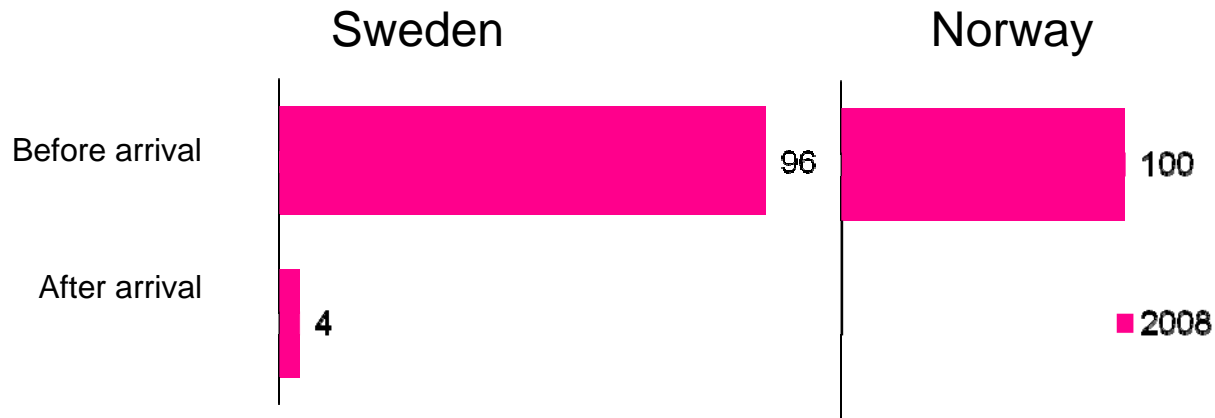
# Booking accommodation

% of all the visitors who have arrived from a particular country, who have spent at least one night in Tallinn and who used accommodation (Norway 85 %, Sweden 53%)



# Booking accommodation

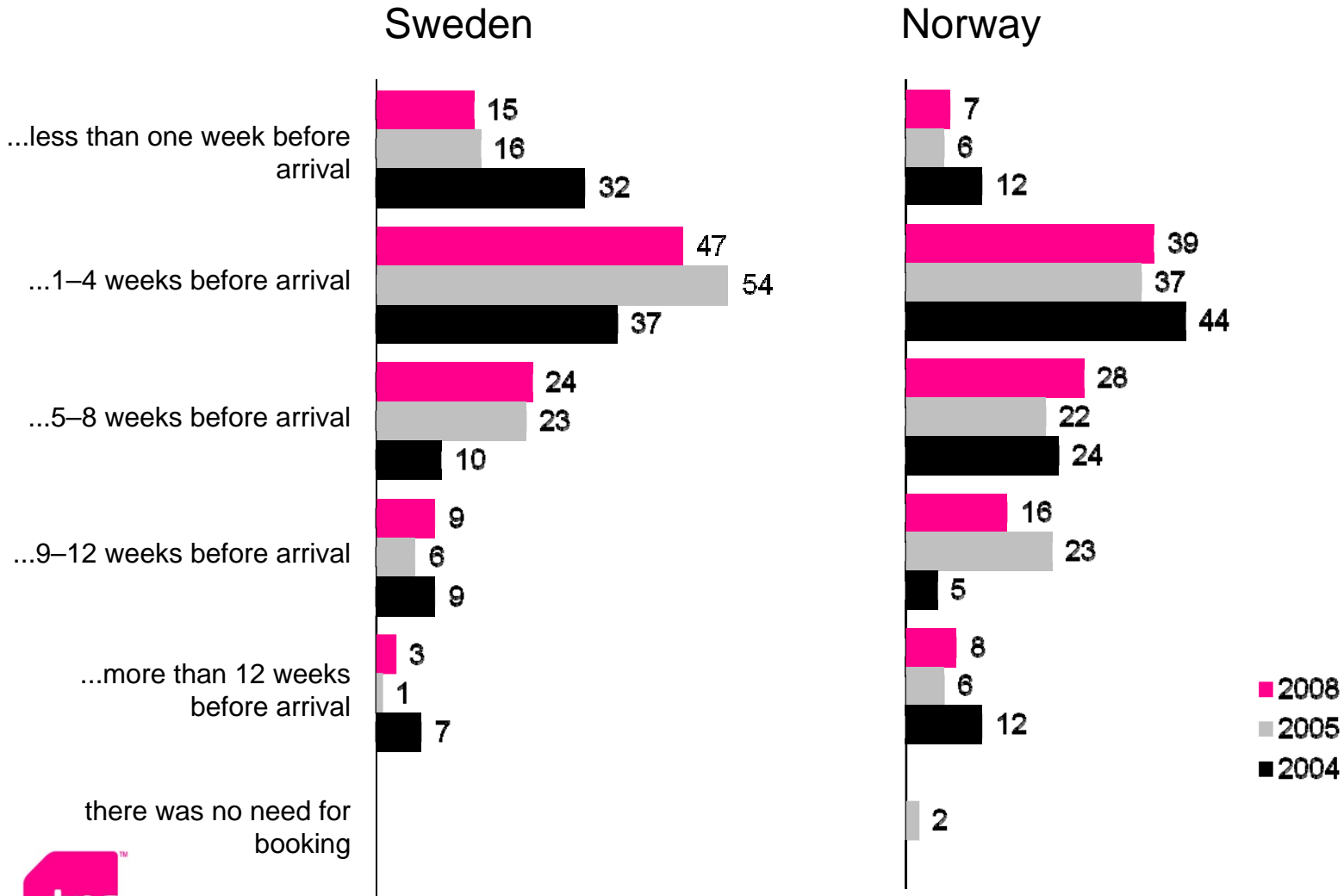
% of all the visitors who have arrived, who have spent at least one night in Tallinn staying in an accommodation establishment and who has booked one's accommodation ( Norway 85 %, Sweden 52 %)



The question was asked differently in the previous years so the comparison is not presented.

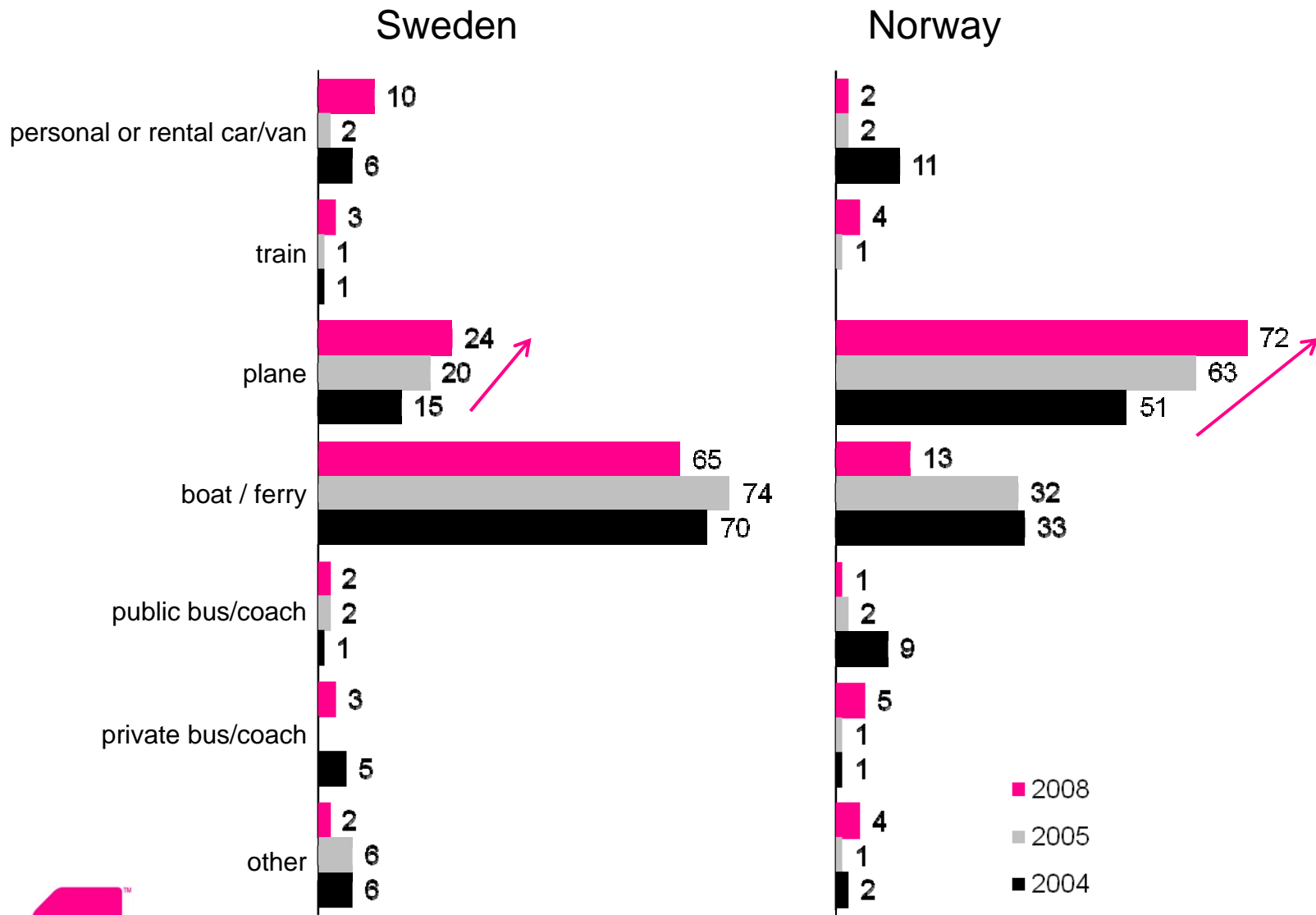
# The time of booking one's accommodation

% of all the visitors who have arrived, who have spent at least one night in Tallinn and who has booked one's accommodation before arrival  
(Norway 85 %, Sweden 51 %)



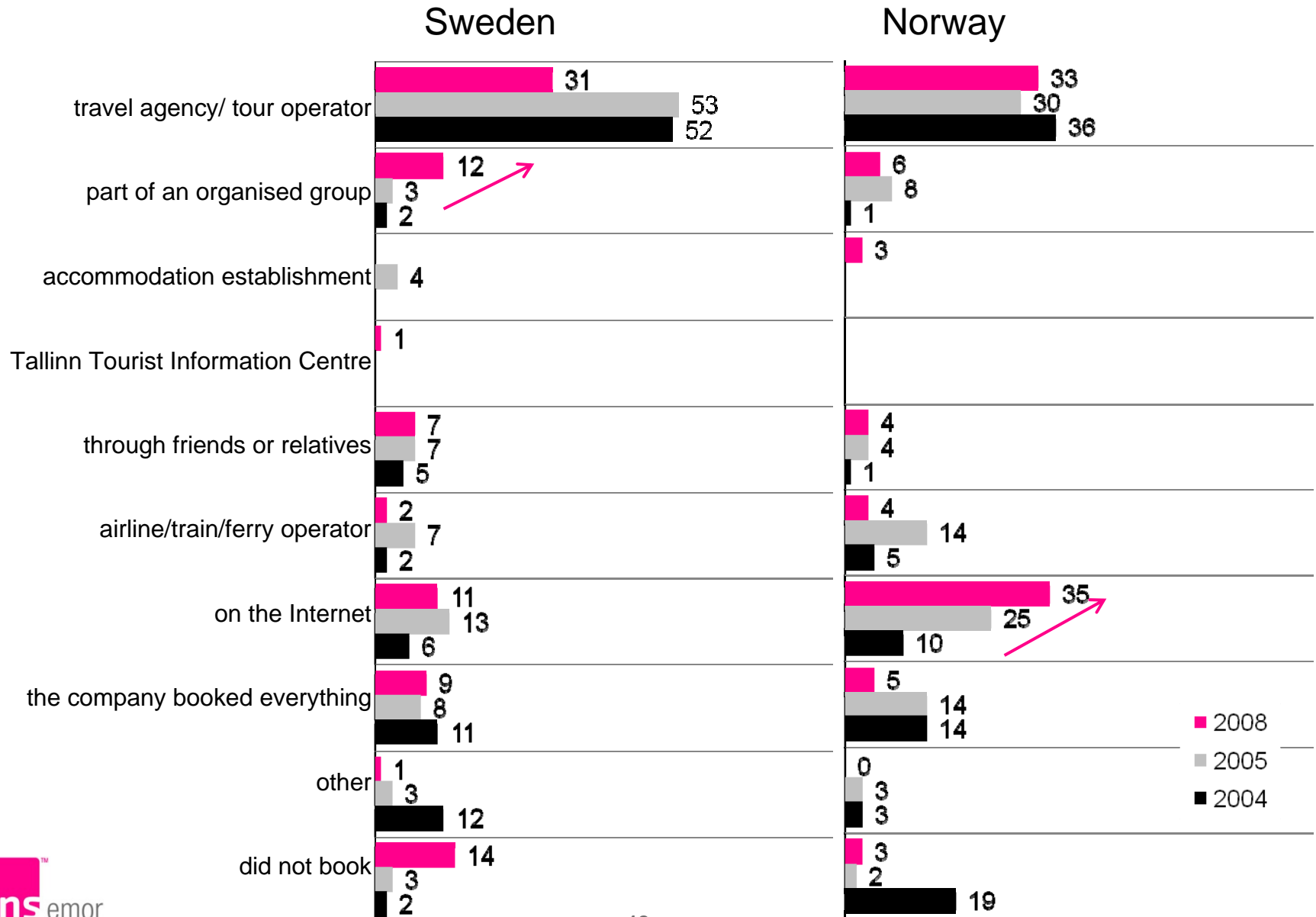
# Transportation to reach Tallinn

% of all the visitors who have arrived from a particular country



# Booking Transportation

% of all the visitors who have arrived from a particular country



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# Tallinn

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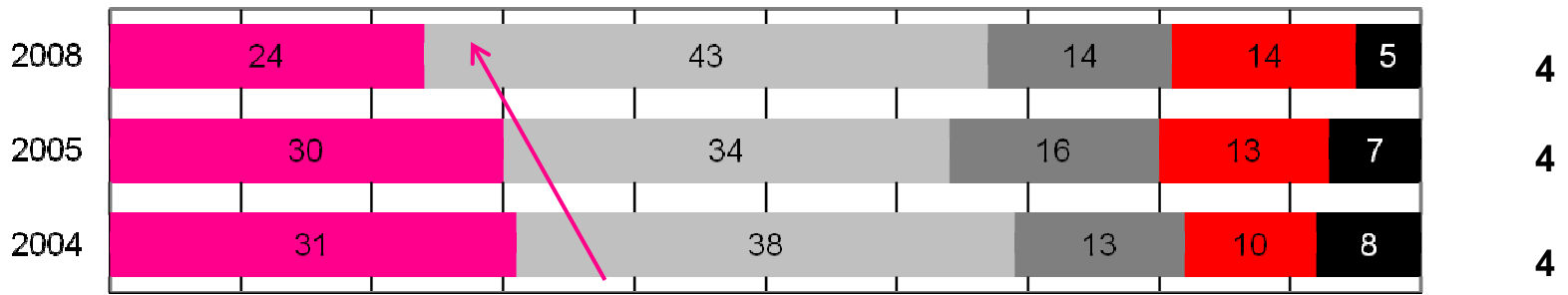
# Number of previous visits to Tallinn

% of all the visitors who have arrived from a particular country

## Sweden

Average number of visits

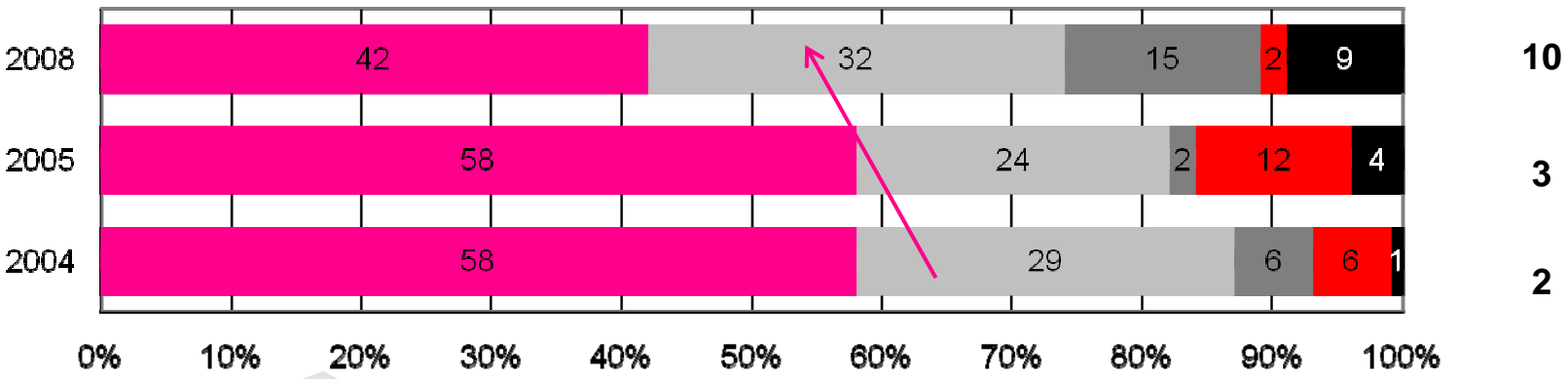
■ Has not visited   ■ 1-2 times   ■ 3-4 times   ■ 5-10 times   ■ more than 11 times



## Norway

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

■ Has not visited   ■ 1-2 times   ■ 3-4 times   ■ 5-10 times   ■ more than 11 times

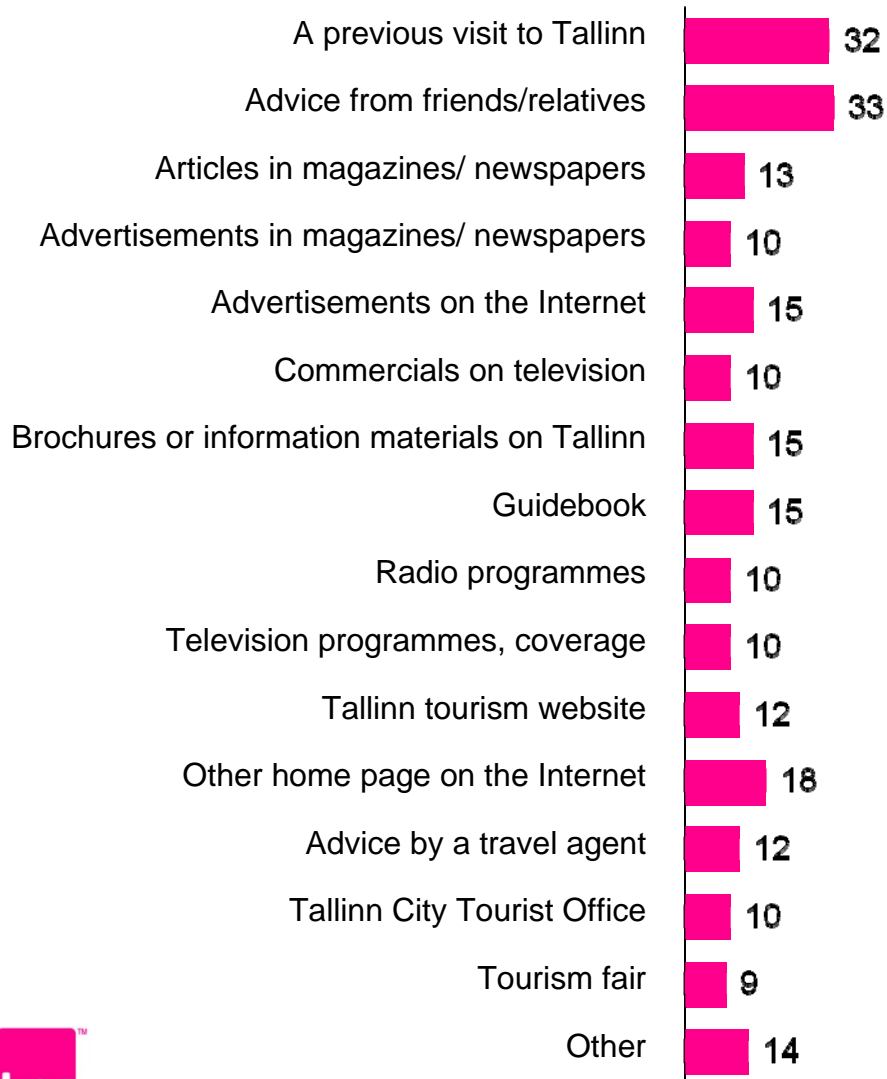


Regardless, dropping trend among Norwegians, the proportion of first time visitors is larger than in average.

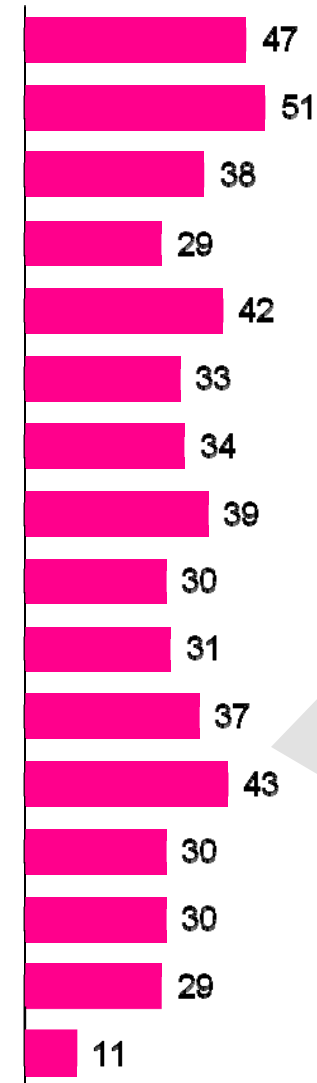
# Information sources about Tallinn

% of all the visitors who have arrived from a particular country

## Sweden



## Norway



The Internet is more important information source for Norwegians than in average. The guidebook is important as well.

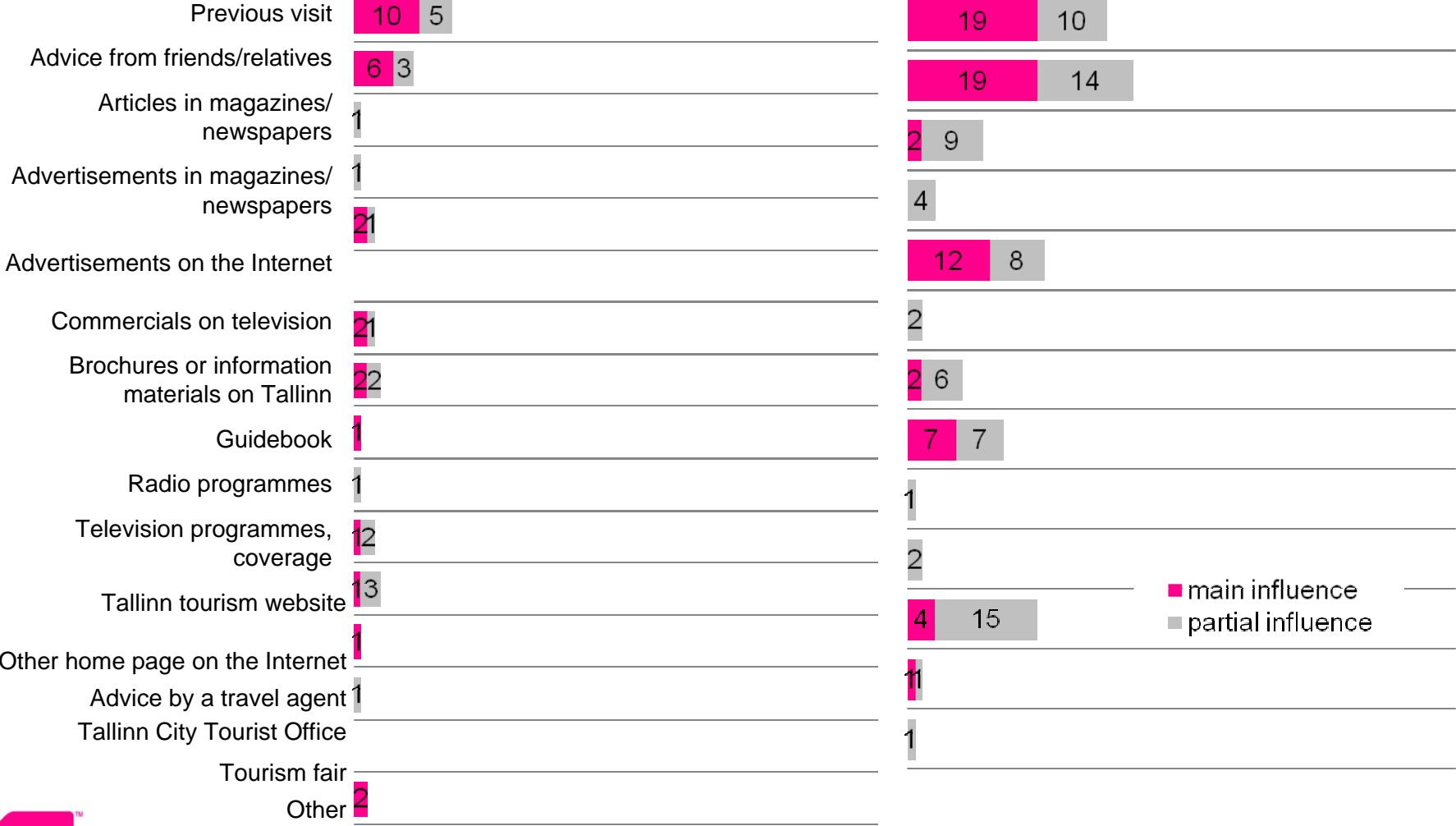
■ 2008

# The Factors that Influence Visiting Tallinn

% of all the visitors who have arrived from a particular country

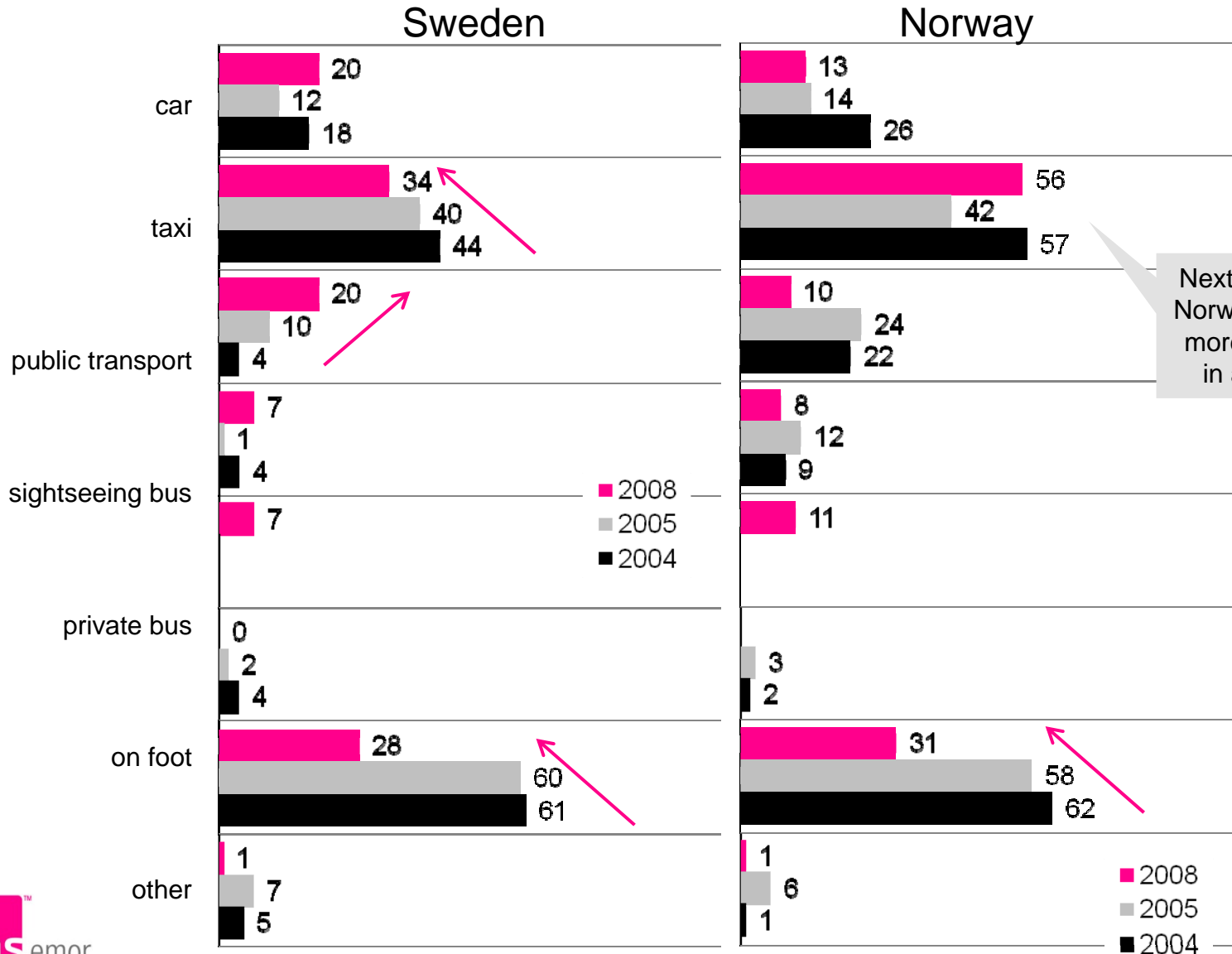
## Sweden

## Norway



# The Transportation Used in Tallinn

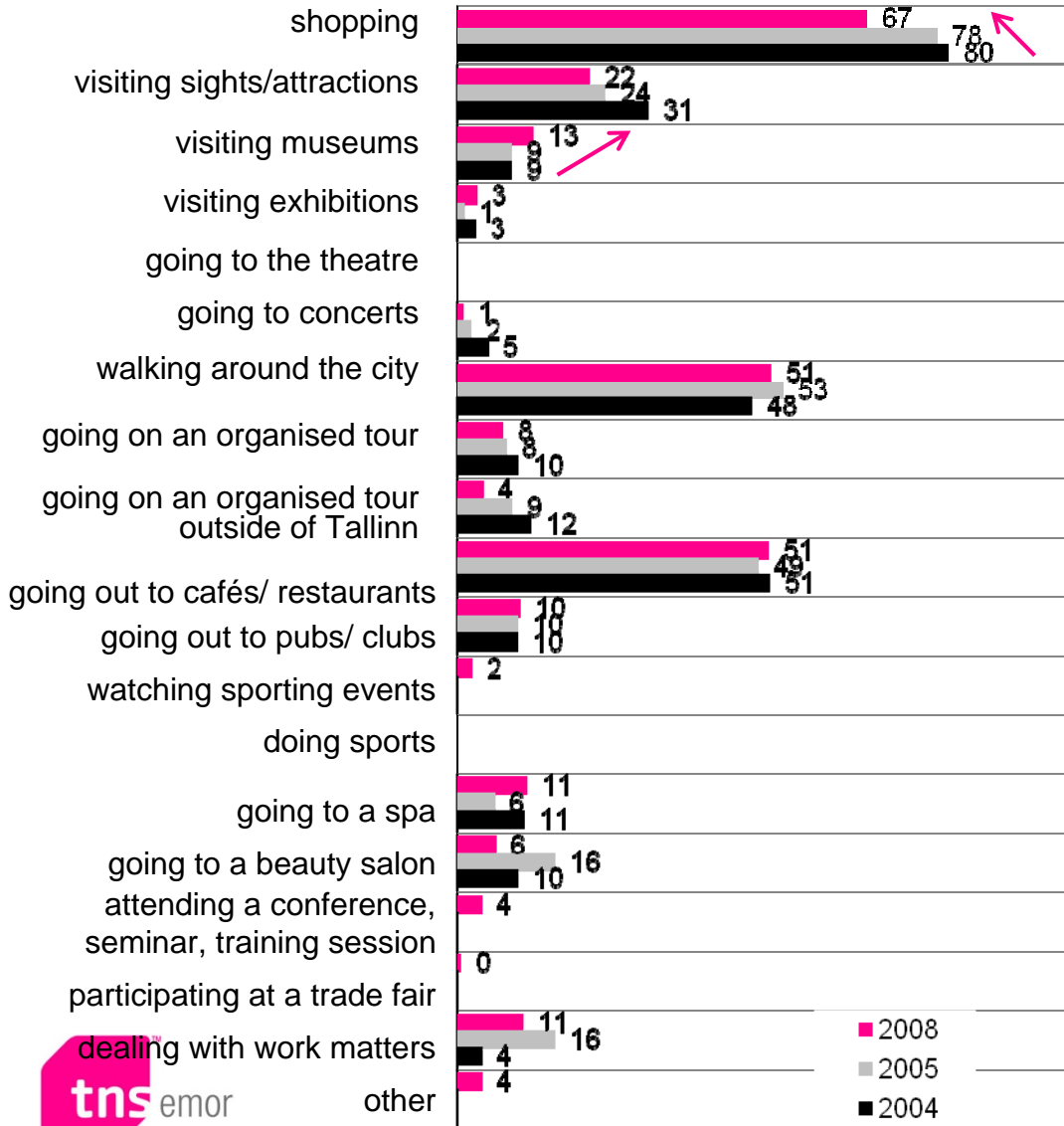
% of all the visitors who have arrived from a particular country



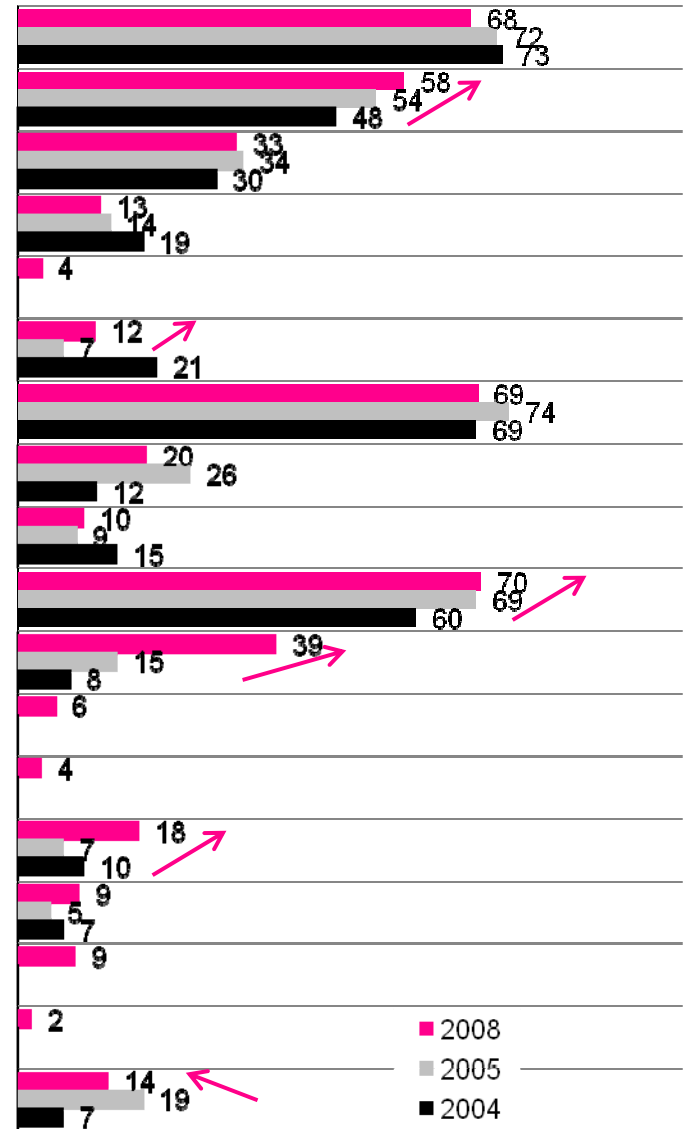
# Activities Tallinn

% of all the visitors who have arrived from a particular country

## Sweden

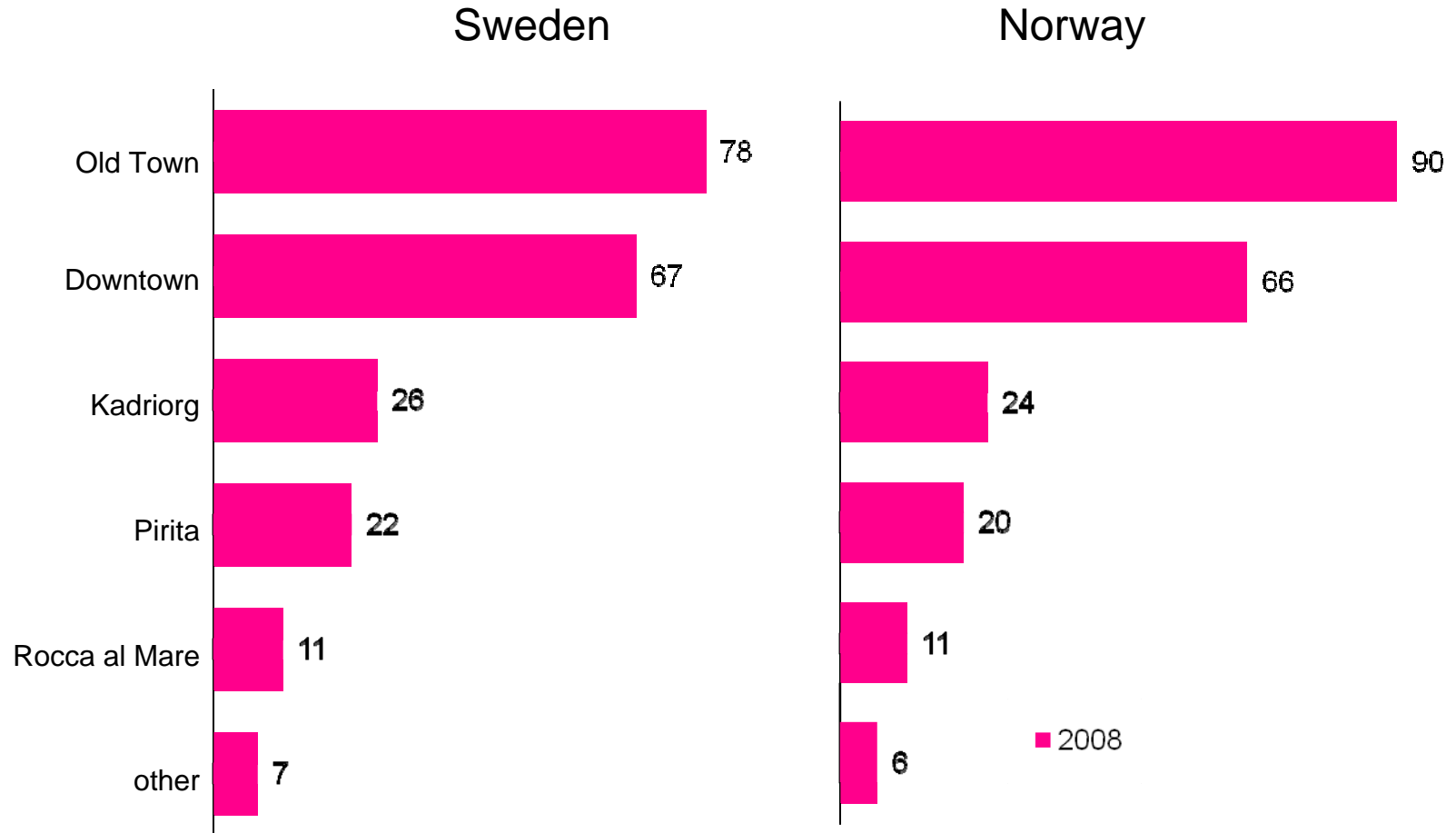


## Norway



# Areas of Tallinn Visited

% of all the visitors who have arrived from a particular country



# Evaluation of Overall impression of Tallinn Trip

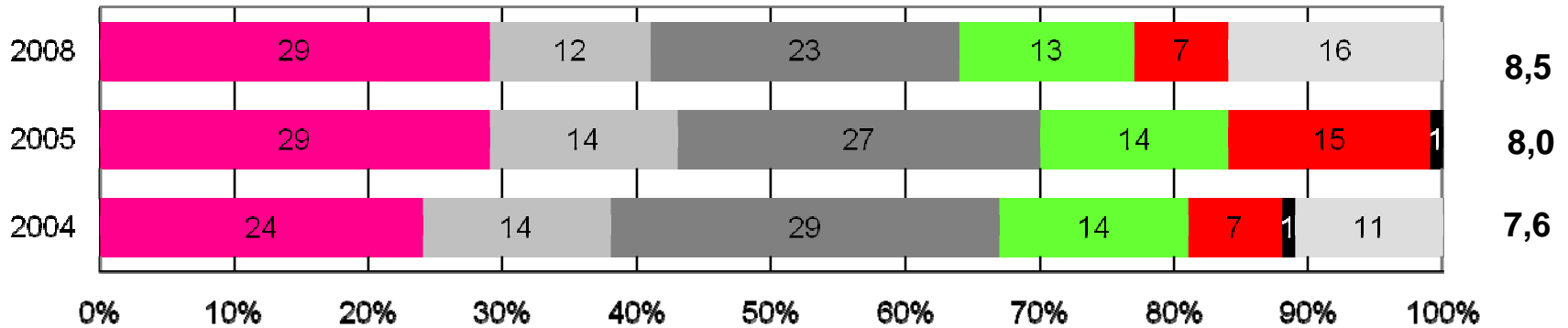
% of all the visitors who have arrived from a particular country

Among Norwegians and Swedes there are more visitors who did not know how to evaluate their impression.

Average evaluation

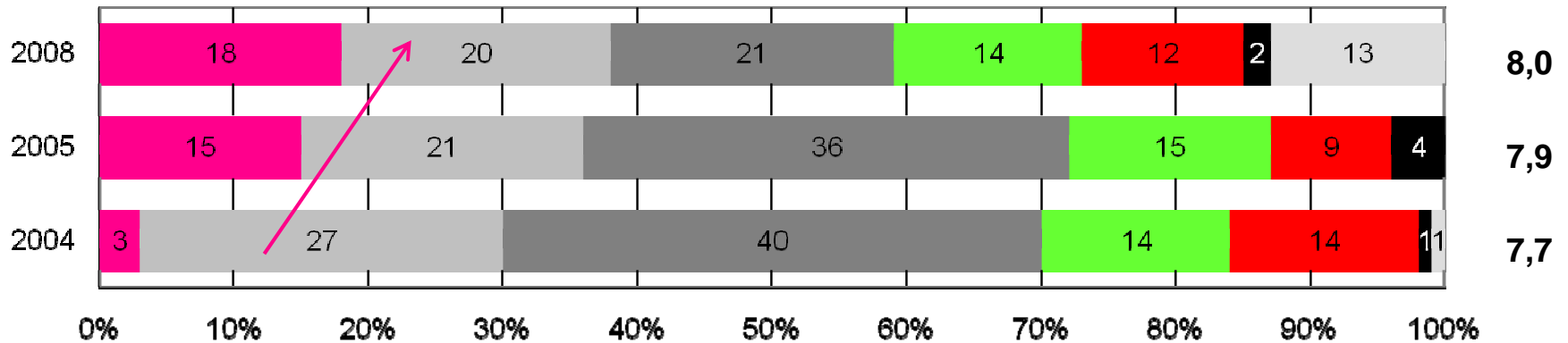
## Sweden

■ 10 points- very good ■ 9 points ■ 8 points ■ 7 points ■ 5-6 points ■ 1-4 points - very bad ■ don't know/no answer



## Norway

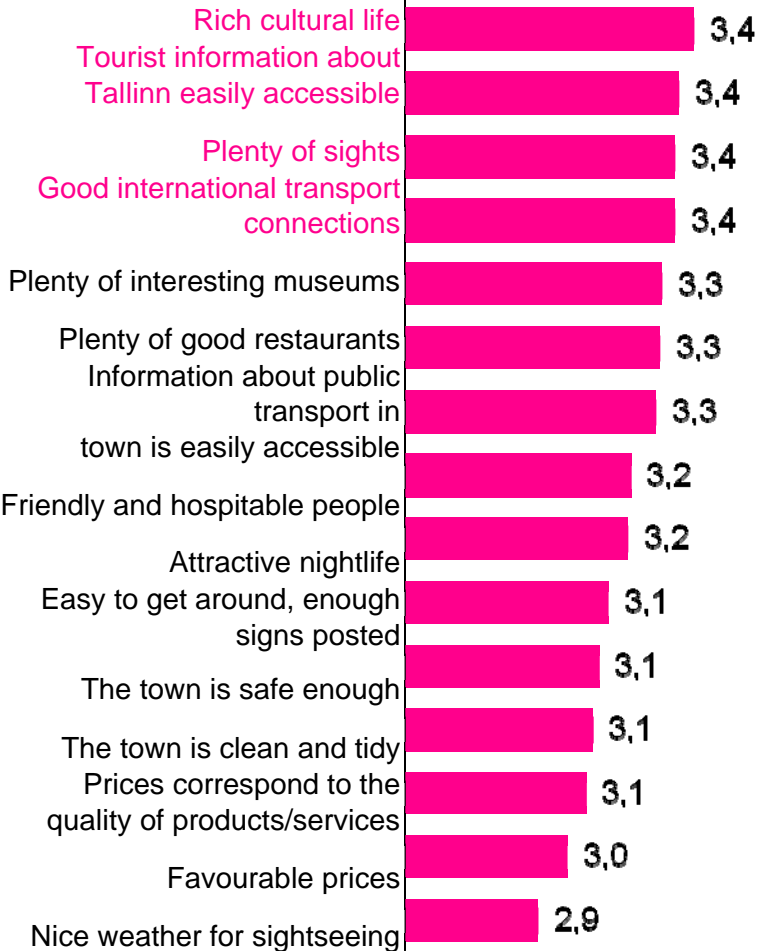
■ 10 points- very good ■ 9 points ■ 8 points ■ 7 points ■ 5-6 points ■ 1-4 points - very bad ■ don't know/no answer



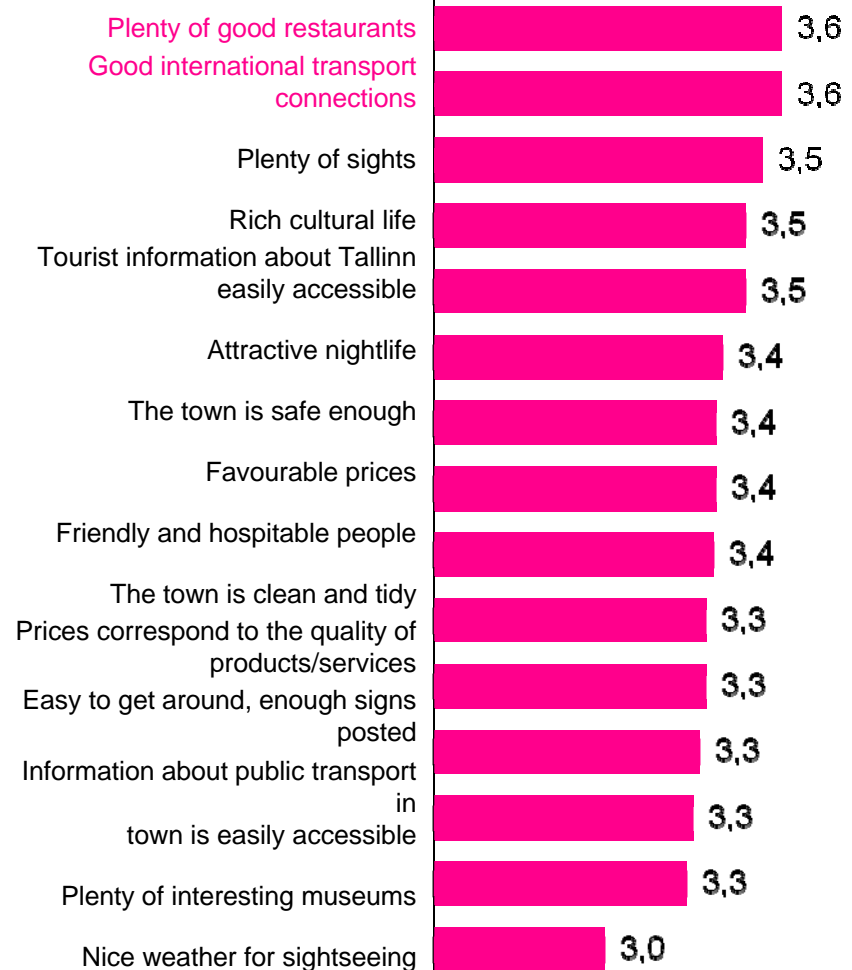
# The Image of Tallinn\*

Average evaluation on 4-point scale where 1 is minimum and 4 is maximum evaluation

## Sweden



## Norway

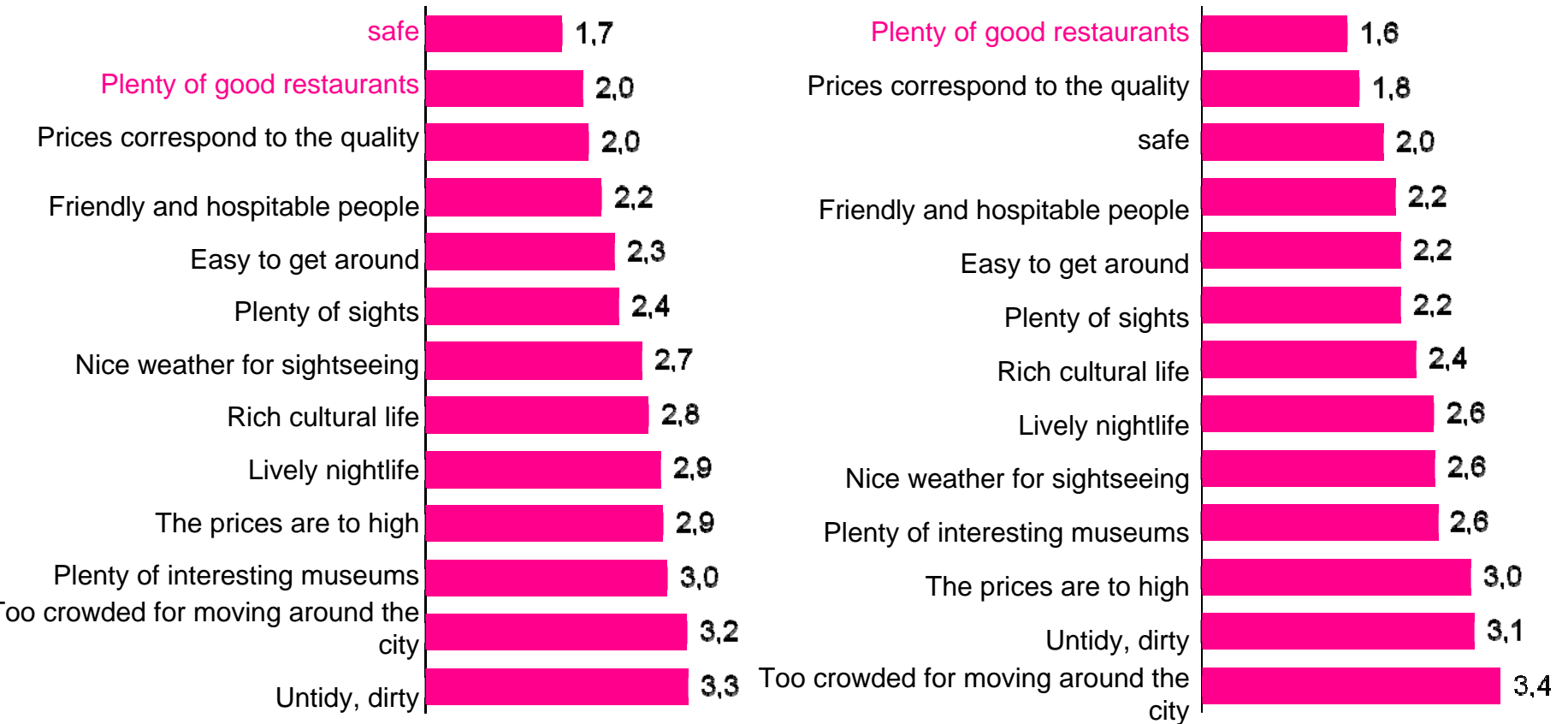


# Tallinn image in the eye of Swedes

Average evaluation on 5-point scale where 5 is minimum and 1 is maximum evaluation

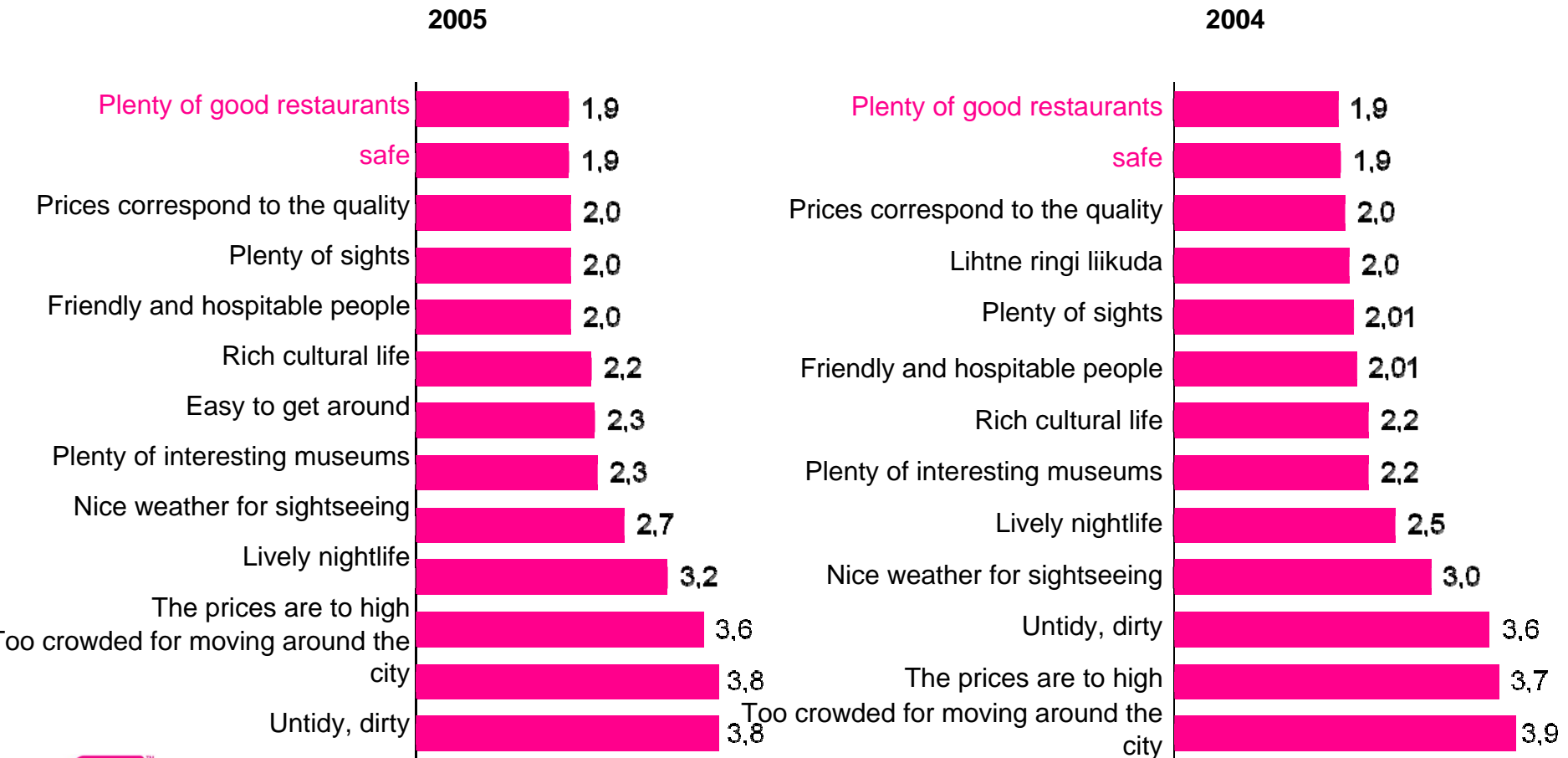
2005

2004



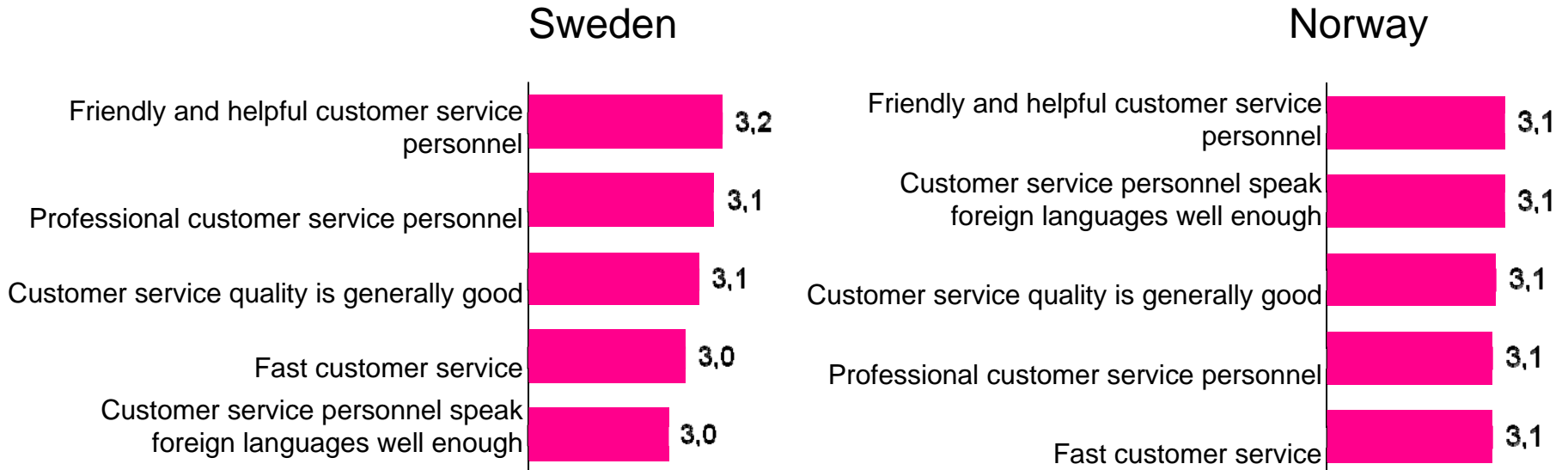
# Tallinn image in the eye of Norwegians

Average evaluation on 5-point scale where 5 is minimum and 1 is maximum evaluation



# Tallinn customer service culture\*

Average evaluation on 4-point scale where 1 is minimum and 4 is maximum evaluation



\* This question was included in the survey for the first time in 2008, so the comparison is not possible here.

# Positive impressions of Tallinn

Next a summary of respondents' comments on the question *Are there any comments you'd like to add about something that you are extremely satisfied with or what was the most positive experience you had in Tallinn?* will be presented.

## Sweden

Old Town

Restaurants, bars, eateries

Positive experience with Estonians

Shops, shopping centres

## Norway

Old Town

Restaurants, bars, eateries

Positive experience with Estonians

Shops, shopping centres

Hotels

Cheap prices

Art centre, museum

# What could be better in Tallinn?

Next a summary of respondents' comments on the question *Are there any comments you'd like to add about something that you were not satisfied with or what could be better in Tallinn?* will be presented.

## Sweden

- Language problems
- Cold or bad weather
- Not safe, a lot of pickpockets
- Dirty or slippery streets
- Not enough toilets in the streets
- Negative experience with Estonians
- Connected with hotels
- Bad traffic, traffic jams, parking
- Unfriendly customer service personnel

## Norway

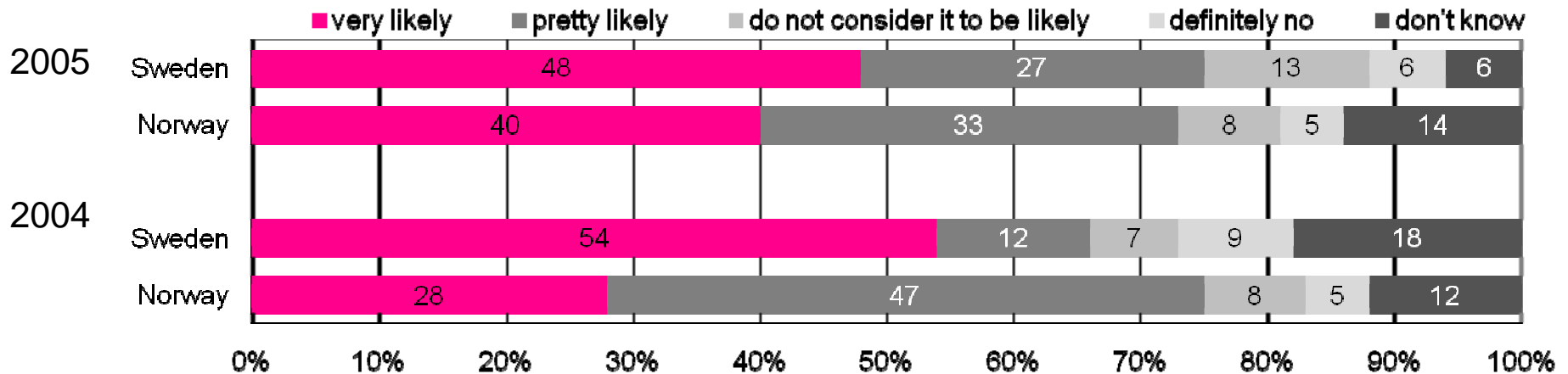
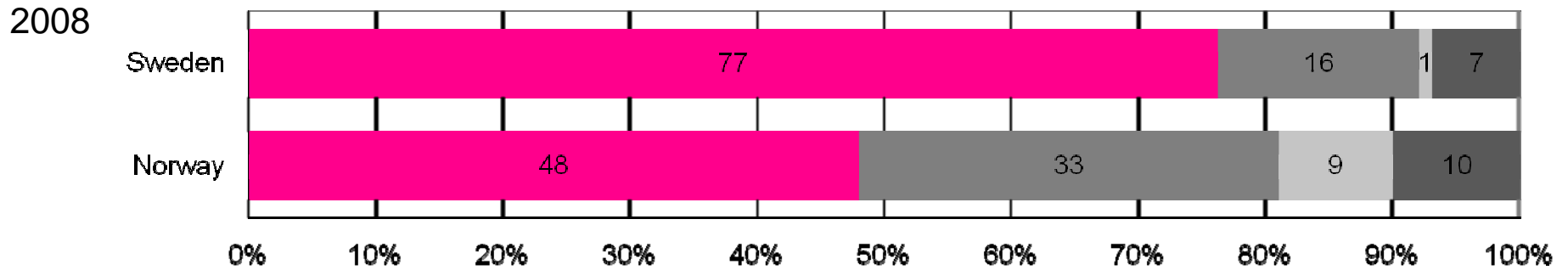
- Language problems
- Cold or bad weather
- Dirty or slippery streets
- Expensive public transportation
- Bad traffic, traffic jams, parking
- Unfriendly customer service personnel

# Likelihood of visiting Tallinn again

% of all the visitors who have arrived from a particular country

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

■ very likely   
 ■ quite likely   
 ■ not very likely   
 ■ will definitely not visit   
 ■ don't know

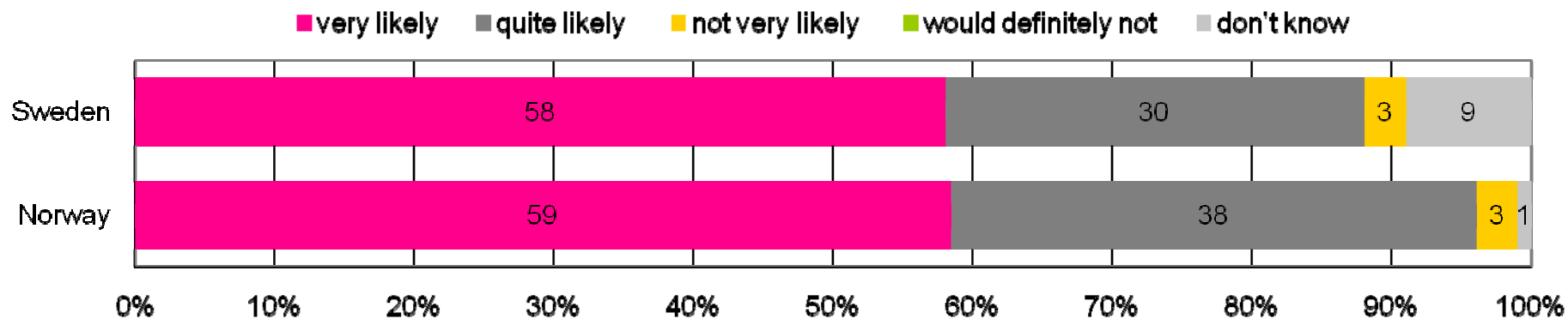


# Recommendation communication

% of all the visitors who have arrived from a particular country

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

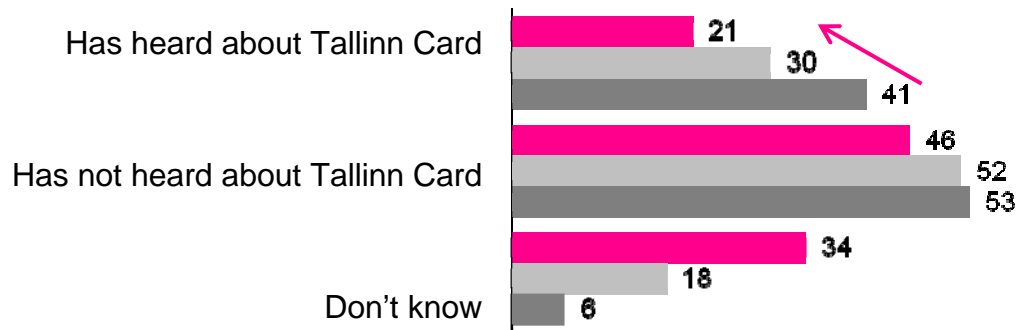
2008



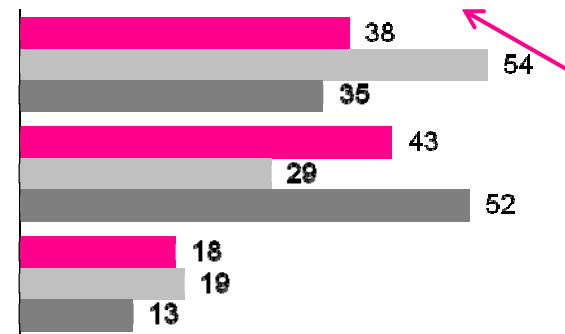
# Information about Tallinn Card

% of all the visitors who have arrived from a particular country

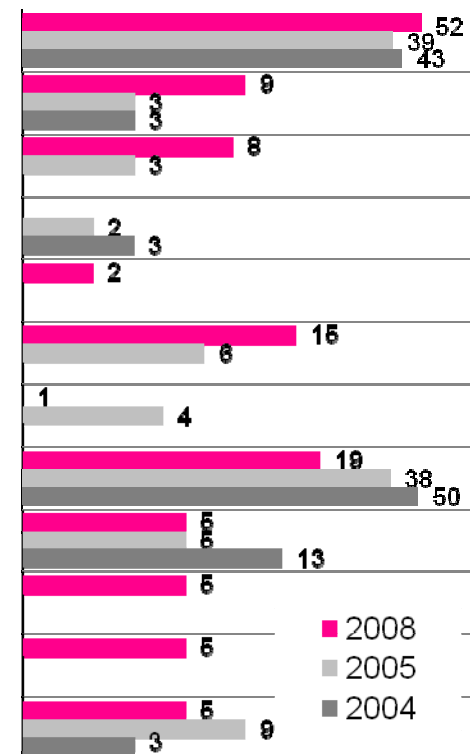
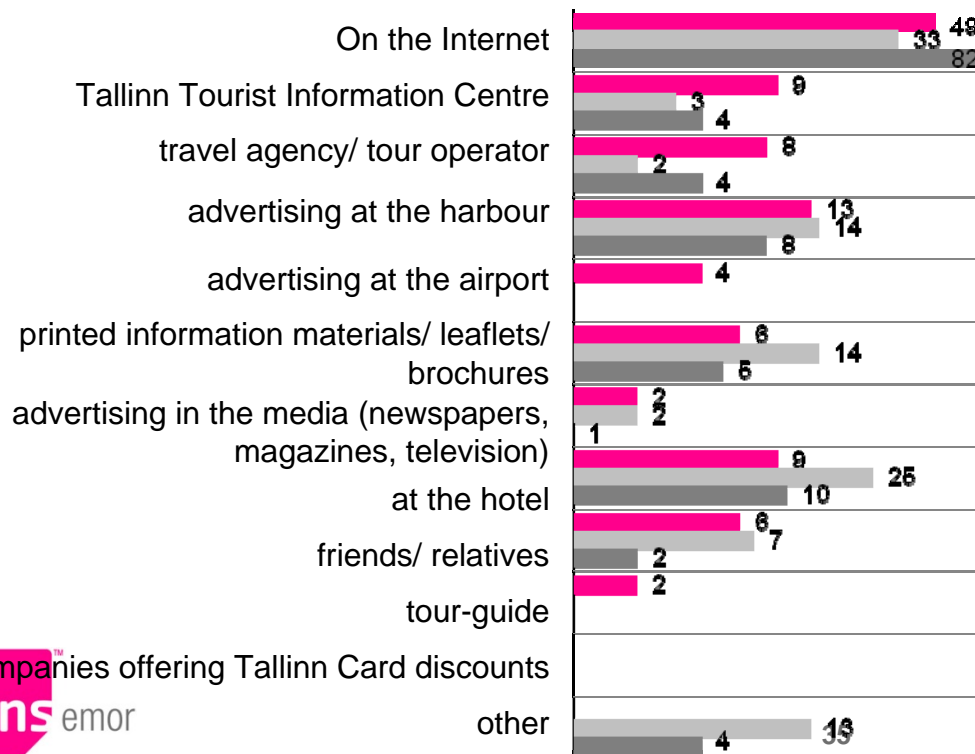
## Sweden



## Norway

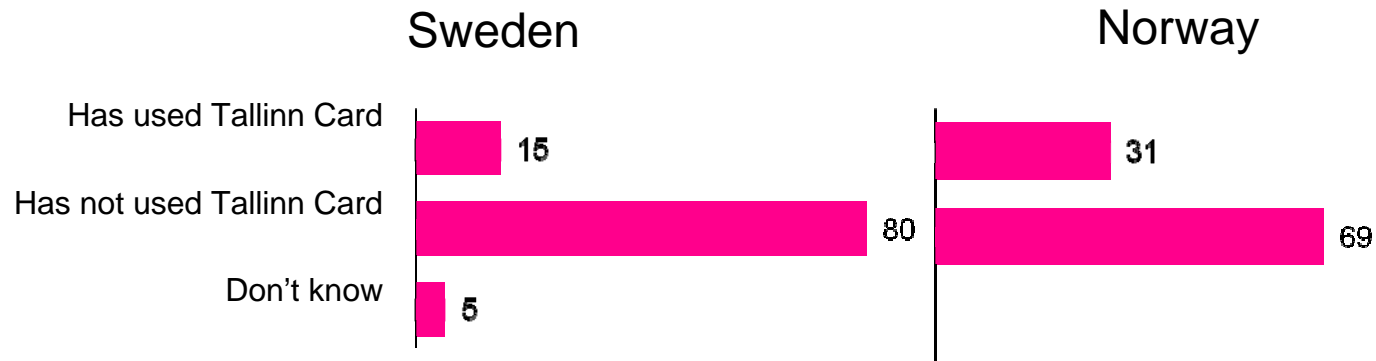


% of all the visitors who have heard about Tallinn Card



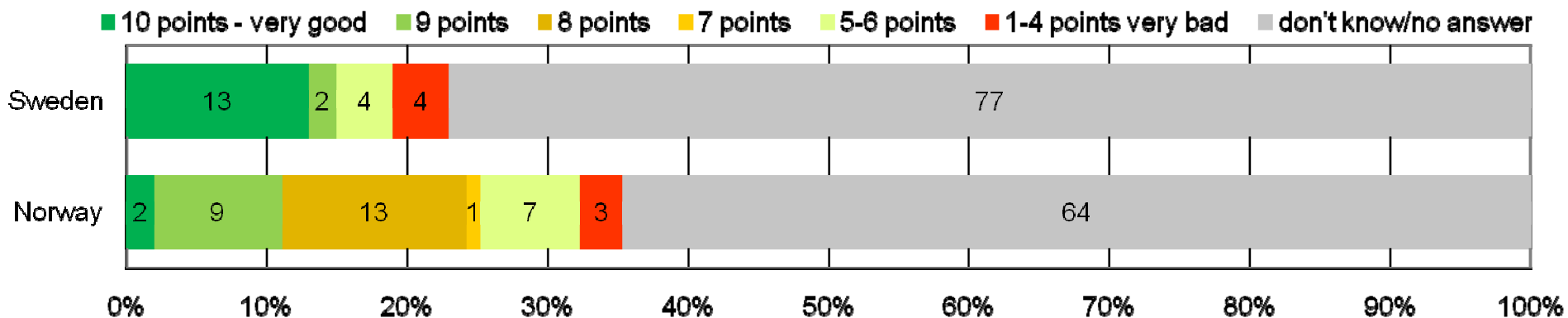
# The Usage of Tallinn Card

% of all the visitors who have heard about Tallinn Card (Norway 38%, Sweden 21 %)



# Opinion about Tallinn Card

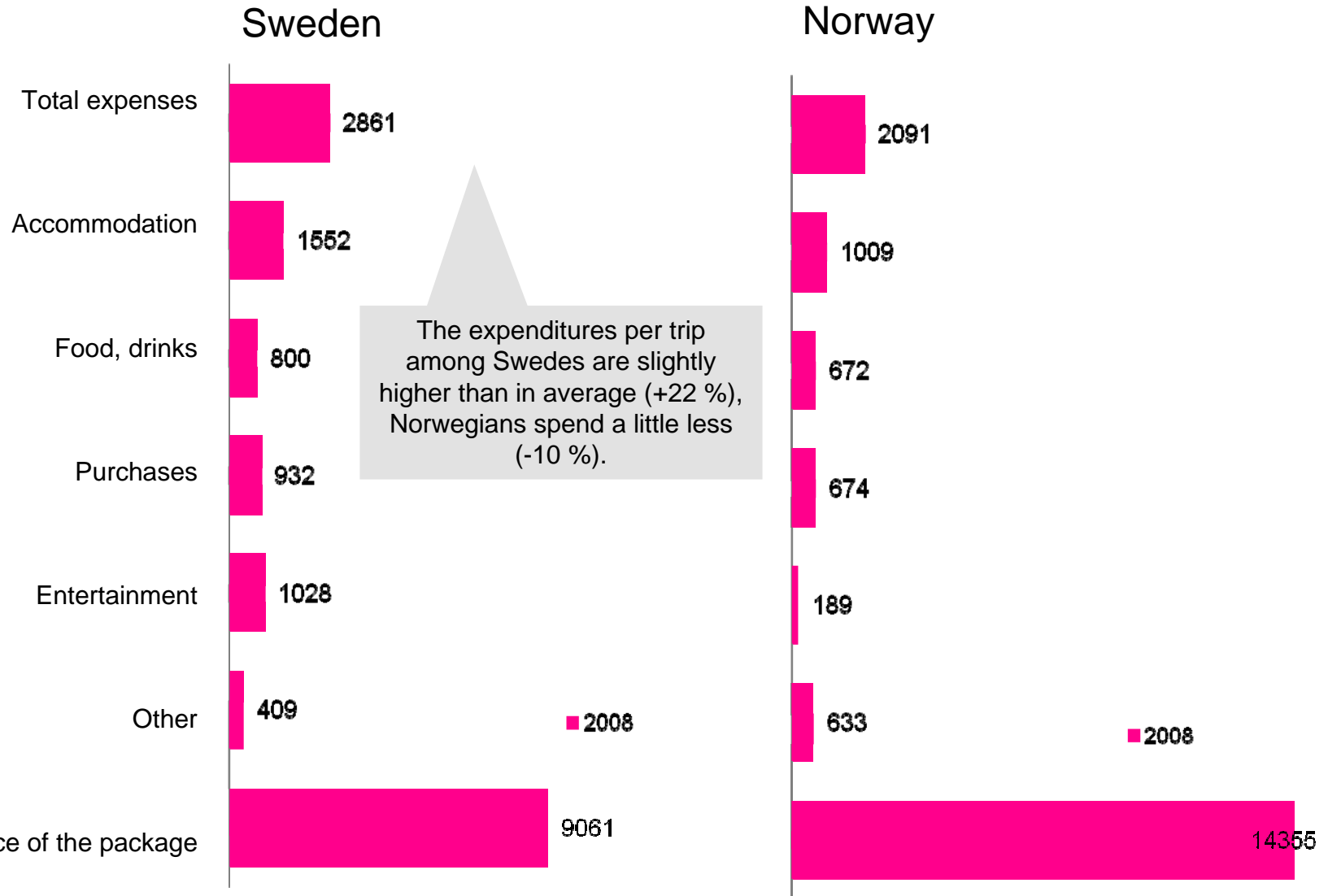
% of all the visitors who have heard about Tallinn Card ( Norway 38%, Sweden 21 %)



The satisfaction with Tallinn Card's price and quality proportion is higher than the average among the Swedes.

# Average expenditures per person per day

Average expenditures per person



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## Summary

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# Norwegian foreign visitors

## 2%\* of all Tallinn foreign visitors

- There was 48 000 foreign visitors from Norway, that is almost the same number as in previous surveys (41 000 in 2005)
- Compared to the previous years the proportion of younger and middle-aged Norwegian visitors has increased. At the same time the proportion of 45- 54 year olds is the largest compared to other countries, the proportion of pensioner has decreased.
- More than half ( 58 %) of the Norwegians come to Tallinn on a holiday and this proportion is increasing every year. Furthermore, the proportion of these people for whom Tallinn is the only destination of the trip is increasing. However, compared to other countries, particularly among Norwegians the proportion of those who visit Tallinn en route is the largest.
- Compared to the previous surveys, the number of visitors who stay for night in Tallinn has increased as well, in average 3 nights is spent in Tallinn. Staying in a mid- range hotel as well as in a superior class hotel has increased significantly. More booking of accommodation is done via the Internet ( 26 % in 2005 vs. 37 % in 2008). In order to reach Tallinn a plane is mainly used and this is an increasing trend.
- Although, the proportion of first time visitors is still considerably larger among Norwegians than in average, the proportion of first time visitors has decreased. ( 42 % in 2008 vs. 58 % in 2005) and this has increased the number of average visits ( 3 in 2005 vs 10 in 2008). The information about Tallinn is gained via the Internet ( e.g Tallinn tourism website, other websites), also the role of the guidebook is important.
- More than half ( 56%) of Norwegians use taxi to move around Tallinn, the proportion of visitors who walk has decreased almost twice. The most preferred activities in Tallinn are visiting sights and cafes/ restaurants, walking around the city and shopping. Compared to 2005 visiting spas, nightclubs and concerts has increased significantly- Norwegian visitors have become more active.
- The satisfaction with Tallinn has increased among Norwegians, at the same time there is a significant proportion of those who give 5-6 points in evaluations ( 12 % on the 10 point scale) or are not able to evaluate at all (13 %).
  - Compared to previous surveys the proportion of Norwegian foreign visitors who have heard about Tallinn Card has decreased (54% in 2005 vs 38 % in 2008).

# Swedish foreign visitors

## 5%\* of all Tallinn foreign visitors

- In 2008 140 000 foreign visitors from Sweden arrived in Tallinn , that is a little less than during the previous survey ( ca166000 in 2005)
- Compared to other countries, the proportion of 65 year olds and older is the largest, at the same time the proportion of 35-44 year olds has increased. The increasing trend can be observed among employees, the proportion of pensioners has decreased.
- In almost half ( 48 %) of the cases the Swedes come on a holiday to Tallinn, because of the larger proportion of older people than in average, there is a larger proportion of Swedes whose purpose of the trip is wellness. The number of visitors who visit only Tallinn during their trip has decreased ( 68 % in 2008 vs 80 % in 2005).
- The proportion of visitors who stay in Tallinn for a night has slightly increased as well as the average number of nights spent in Tallinn, however in comparison with other countries it is still quite low ( in average one night in Tallinn). The proportion of visitors who stay in middle range hotels has increased twice ( 22 % in 2005 vs 48 % in 2008), staying in superior class hotels has decreased. The proportion of Swedes who come to Tallinn with an organised group has increased ( 2% in 2005 vs 12 % in 2008)
- More than half (65%)of the Swedes use ships to reach Tallinn, however using airplane is an increasing trend. Personal car is used more often than in case of other countries.
- The proportion of first time visitors has decreased ( 30 % in 2005 vs 24% in Tallinn), however the average time of visits has stayed the same ( 4 previous visits in average). The most preferred activities among Swedes is shopping, visiting sights and cafes/ restaurants, the activities have more or less stayed the same, visiting spas has increased ( 6 % in 2005 vs 10 % in 2008)
- The overall impression of Tallinn has slightly increased ( average evaluation 8,5 in 2008 vs 8,0 in 2005). The old town is considered positive ( 49 %) and every fourth of Swedes is concerned about slippery streets.
  - The likelihood of future visits is pretty high ( 77 % will definitely visit) and this has increased. Most ( 88%) is eager to advice visiting Tallinn to their friends and relatives.