

Russia and Latvia

2004-2008

December 2008

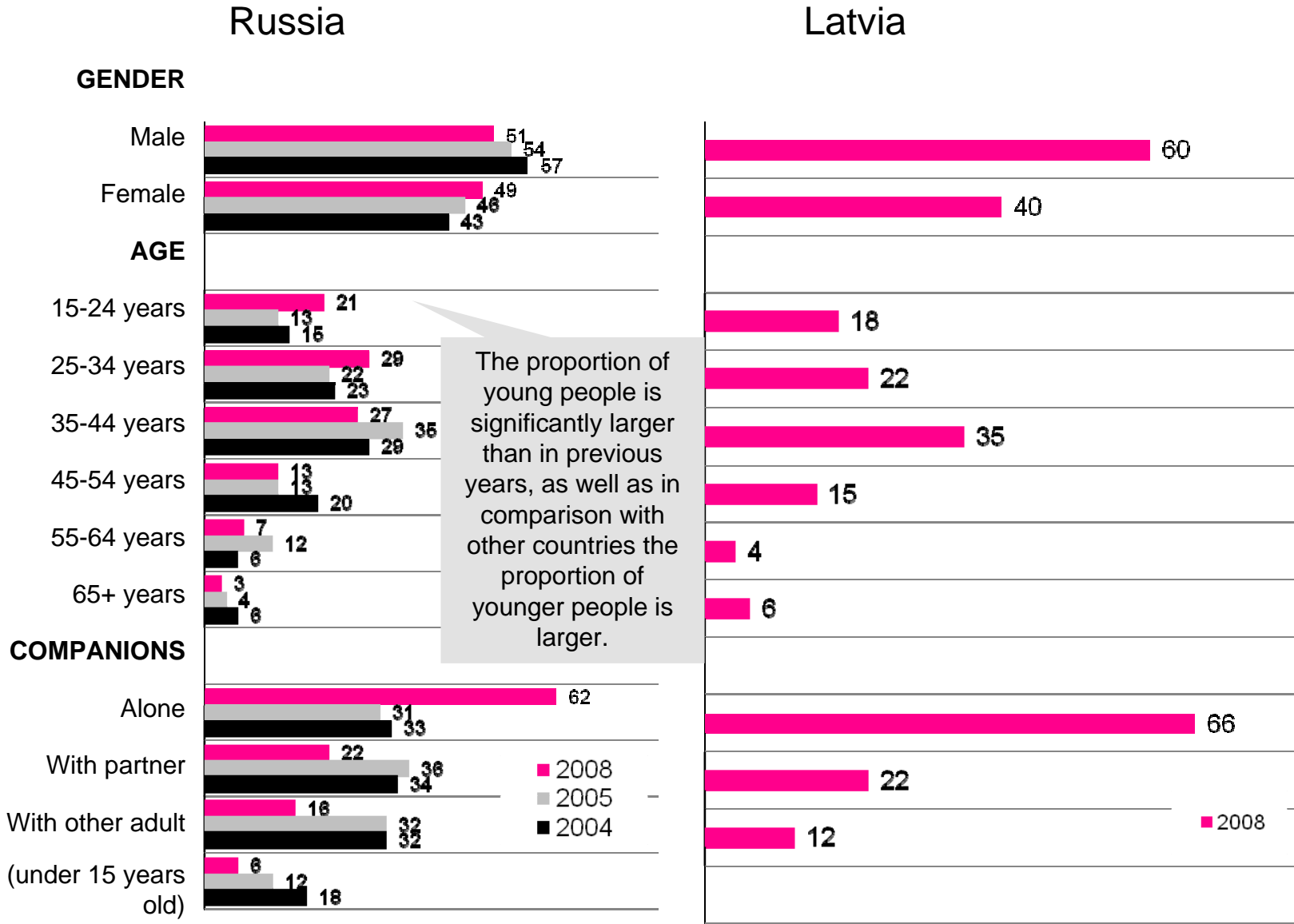


Sample

- **Russian sample size:**
 - 2008 – 155 visitors
 - 2005 – 199 visitors
 - 2004 – 201 visitors
- In 2008 80 % of the visitors who arrive from Russia were questioned in Narva, 9 % in the train station, 8 % in the airport, 3 % in the harbour and 1 % in Ikla checkpoint. (In 2005 78 % in Narva, 21 % in the airport and 1 % in the harbour)
- **The proportion of Russians who visit the country has increased:** Russians make up 7 % of all Tallinn foreign visitors (4% in 2005).
- In the previous year the Latvian target group has not been observed, so the **results for Latvia are presented without comparisons**. The sample size in case of Latvia is 90 respondents. Latvians make up 2 % of all Tallinn foreign visitors.
- In 2008 55% of the Latvian visitors were questioned in Ikla checkpoint, 38 % in the airport and 7 % in the harbour.
- The results in this report are presented according to the weighing methodology I (See Appendix 4).

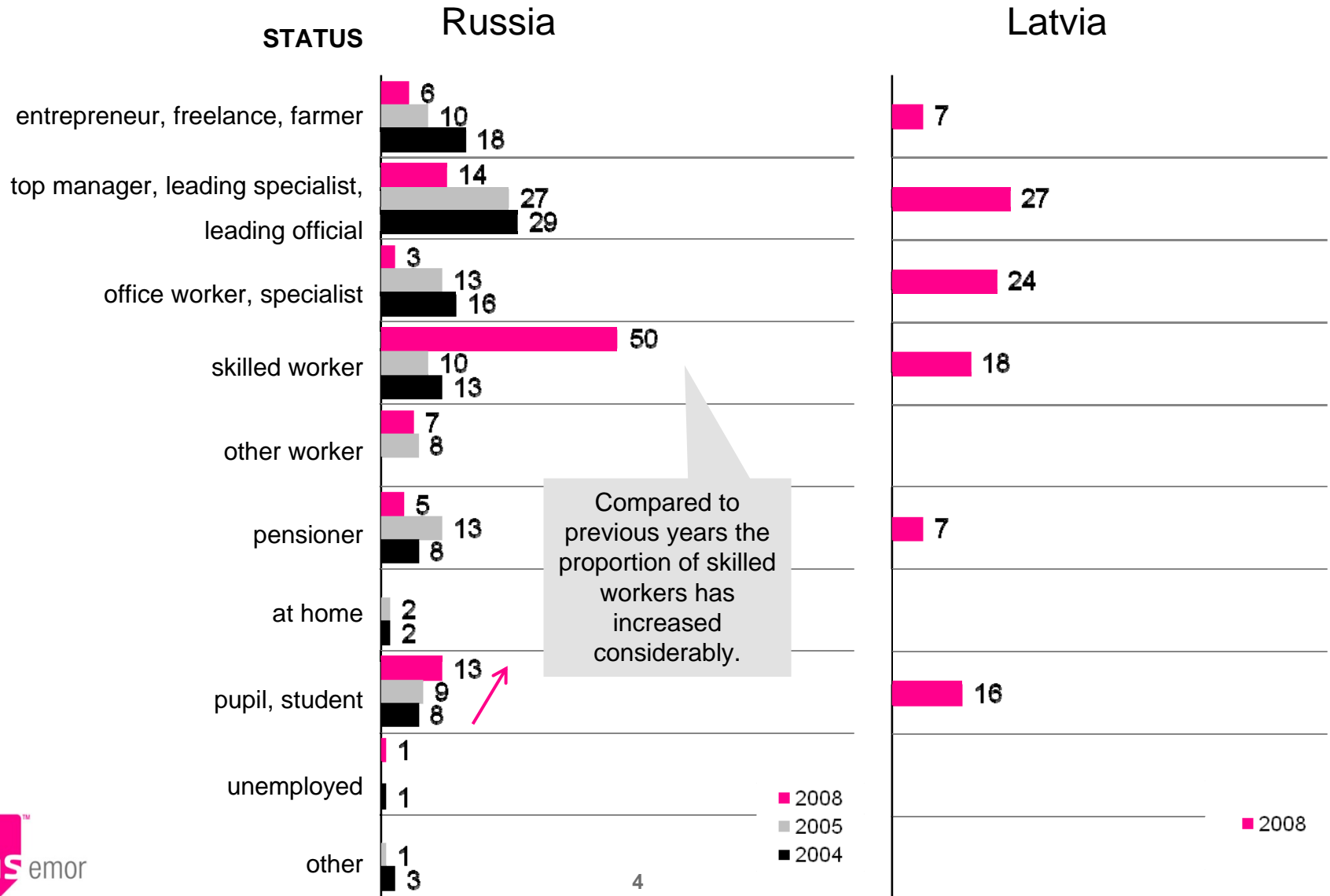
Respondent Profile (1)

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



Respondent Profile (2)

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

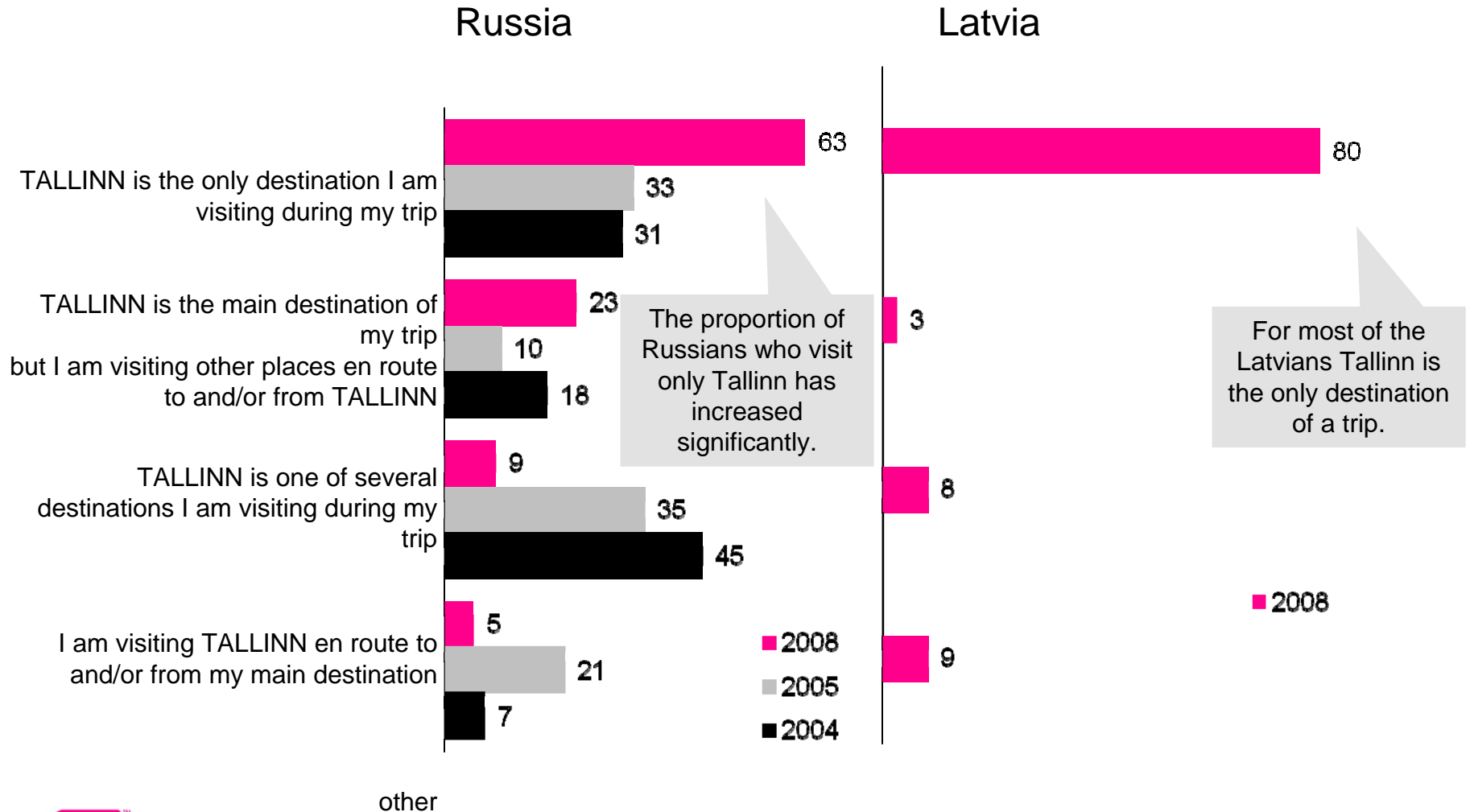


The purpose of the trip and the route



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



The purpose of the trip

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

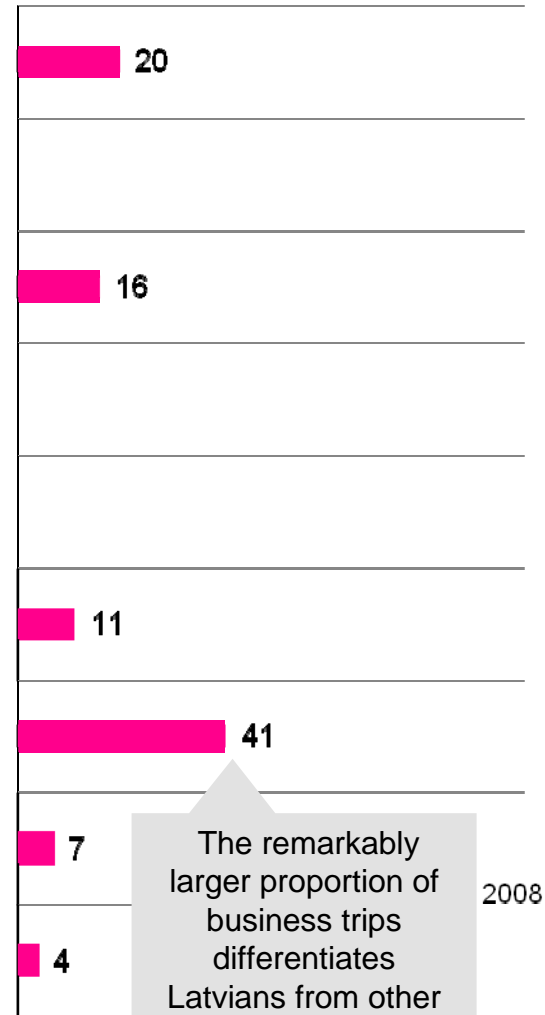
Russia

Latvia



The proportion of visitors who come on a holiday has increased considerably.

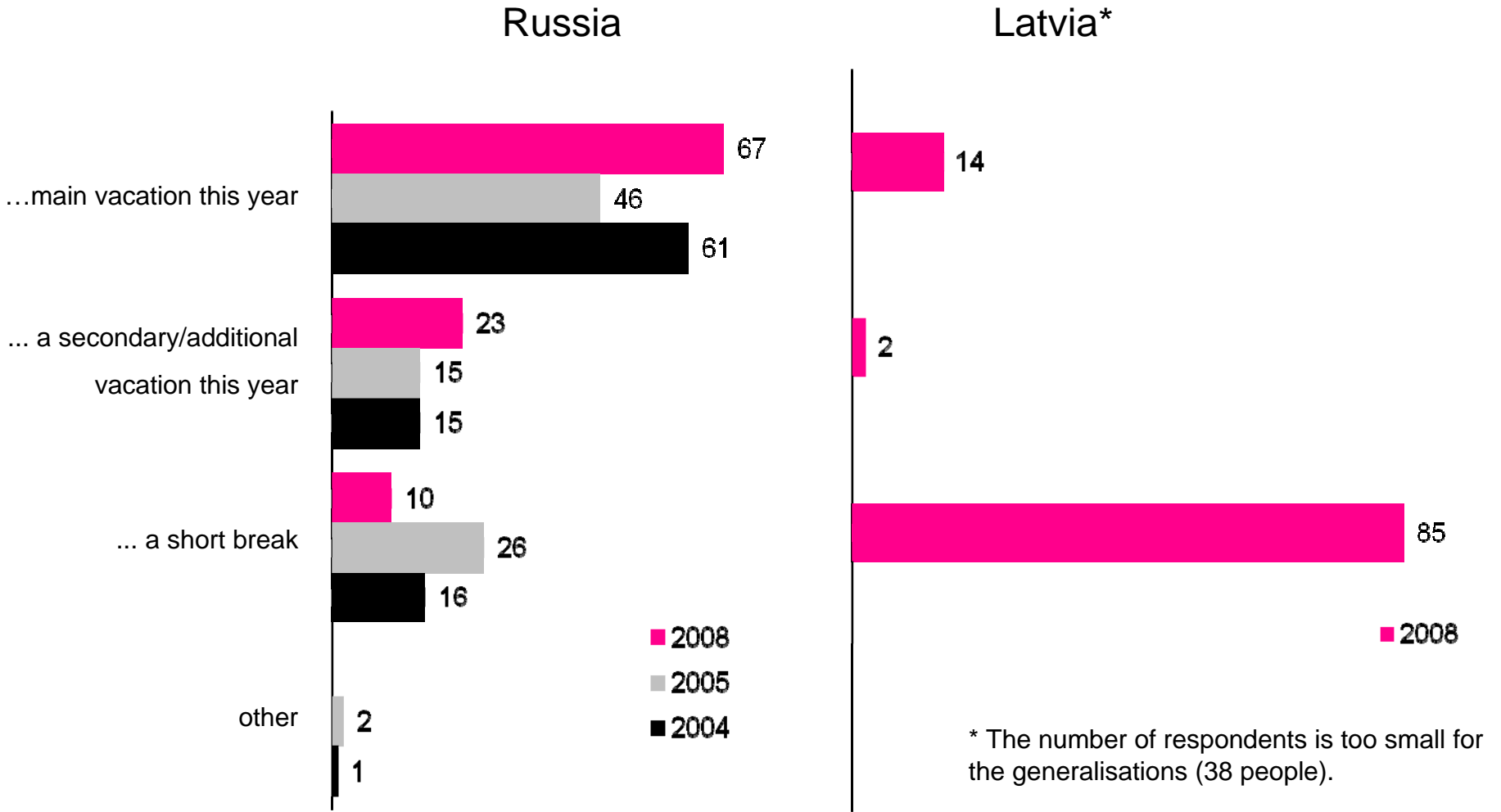
Compared to other countries business, wellness and shopping have less importance.



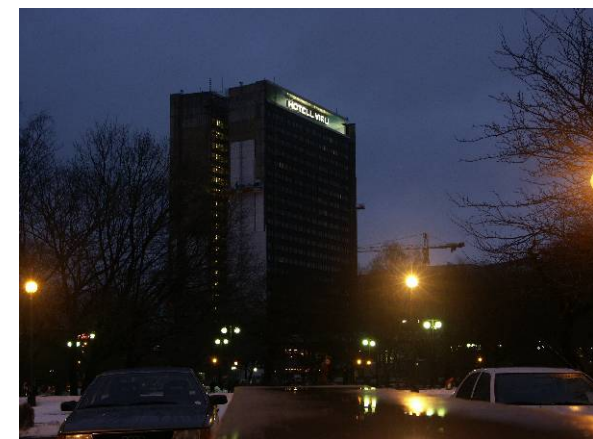
The remarkably larger proportion of business trips differentiates Latvians from other nations.

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



Staying overnight and accommodation



Nights spent away from home during the trip

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

Russia

Latvia

Spent at least one night away from home



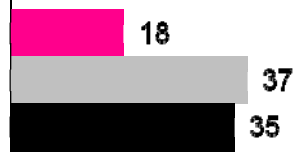
% of all the visitors, who have spent nights away from home



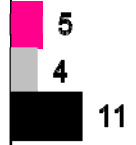
Spent one's nights in Tallinn



Elsewhere in Estonia



Other (ship, train or elsewhere)



■ 2008
■ 2005
■ 2004

■ 2008

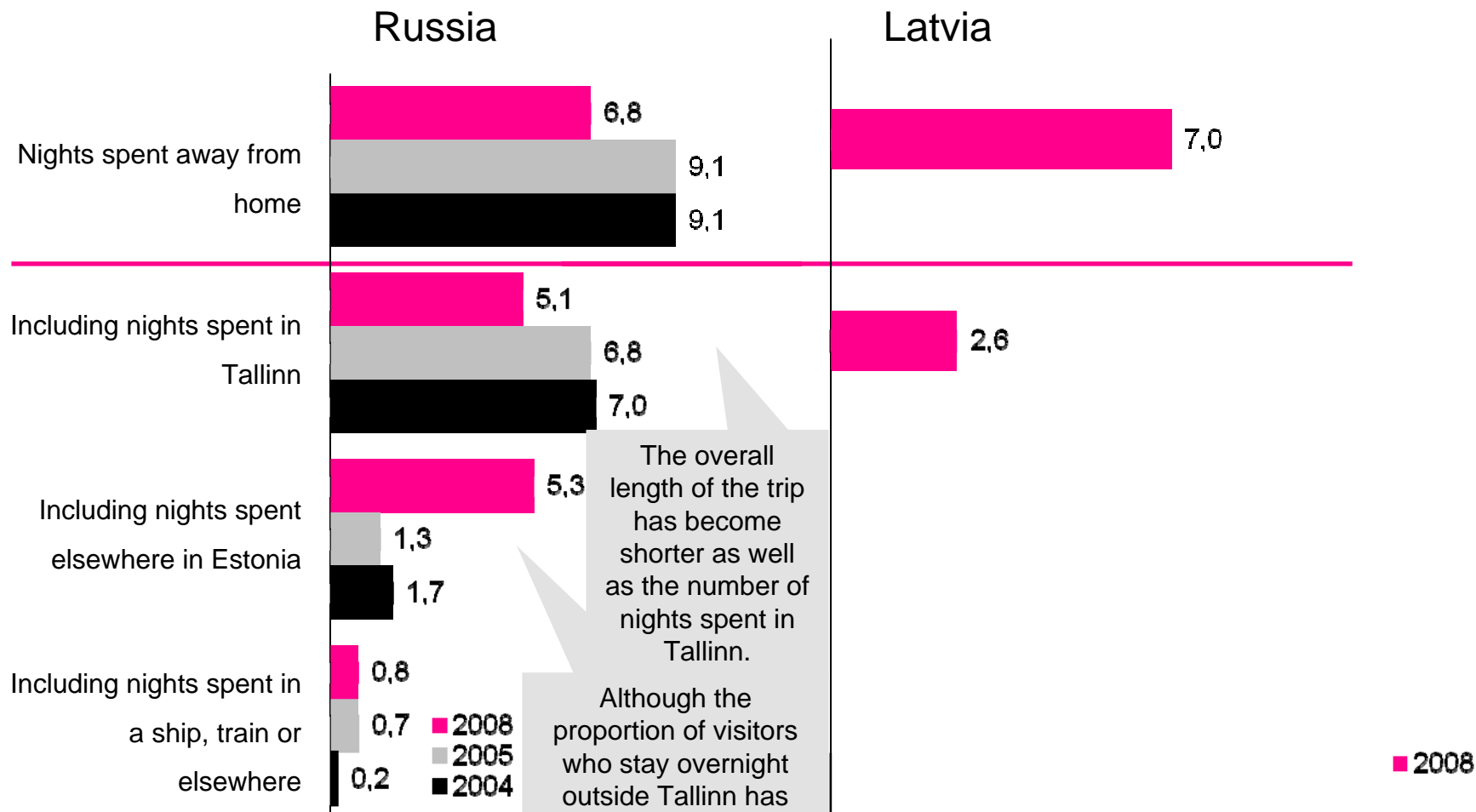
The number of visitors who stay overnight has increased because of an increase of holiday traveller's proportion.

Most of the Latvians questioned stayed only in Tallinn during their trip.

Spending nights away from home

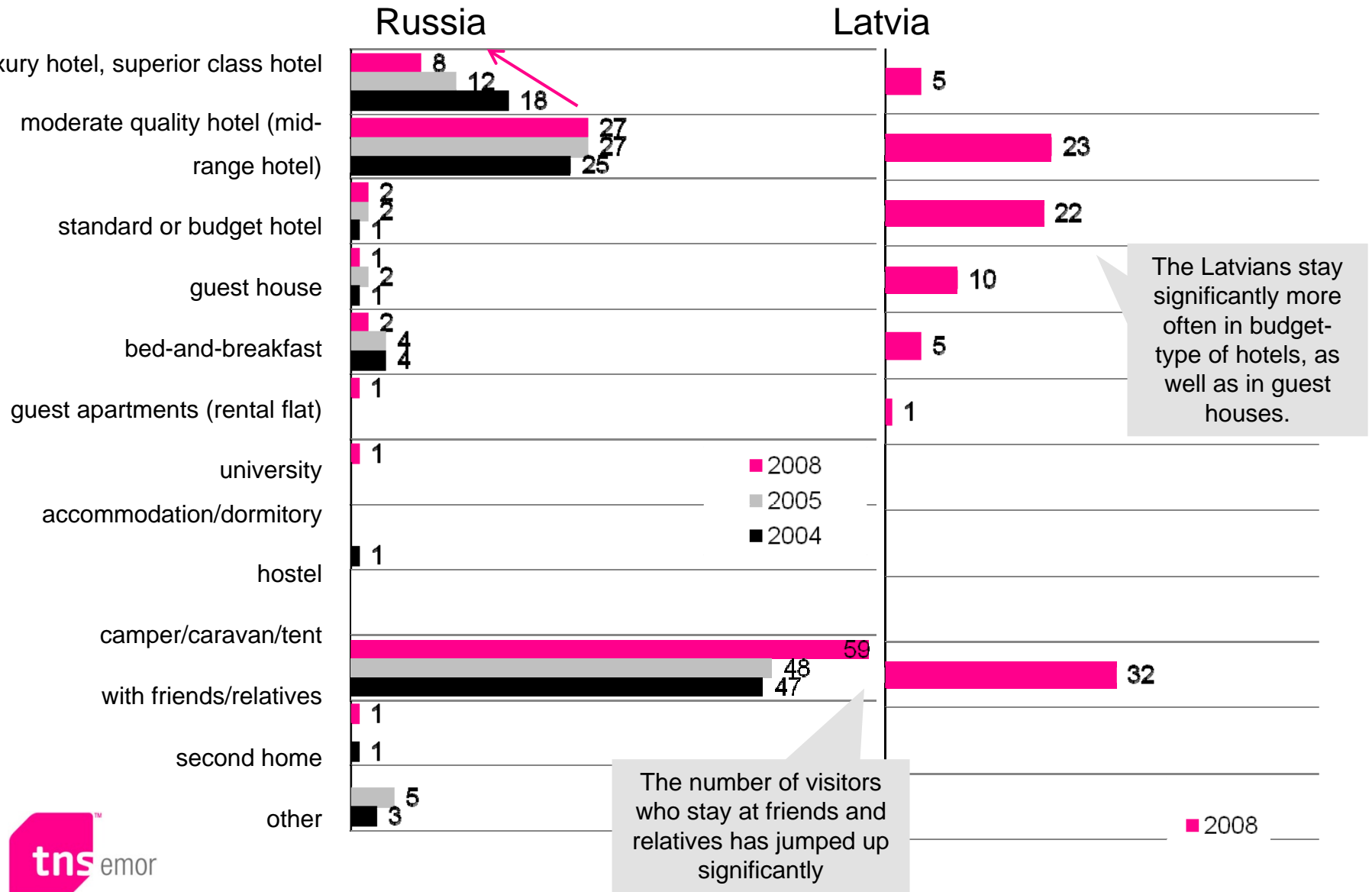
the number of average nights spent away from home

(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

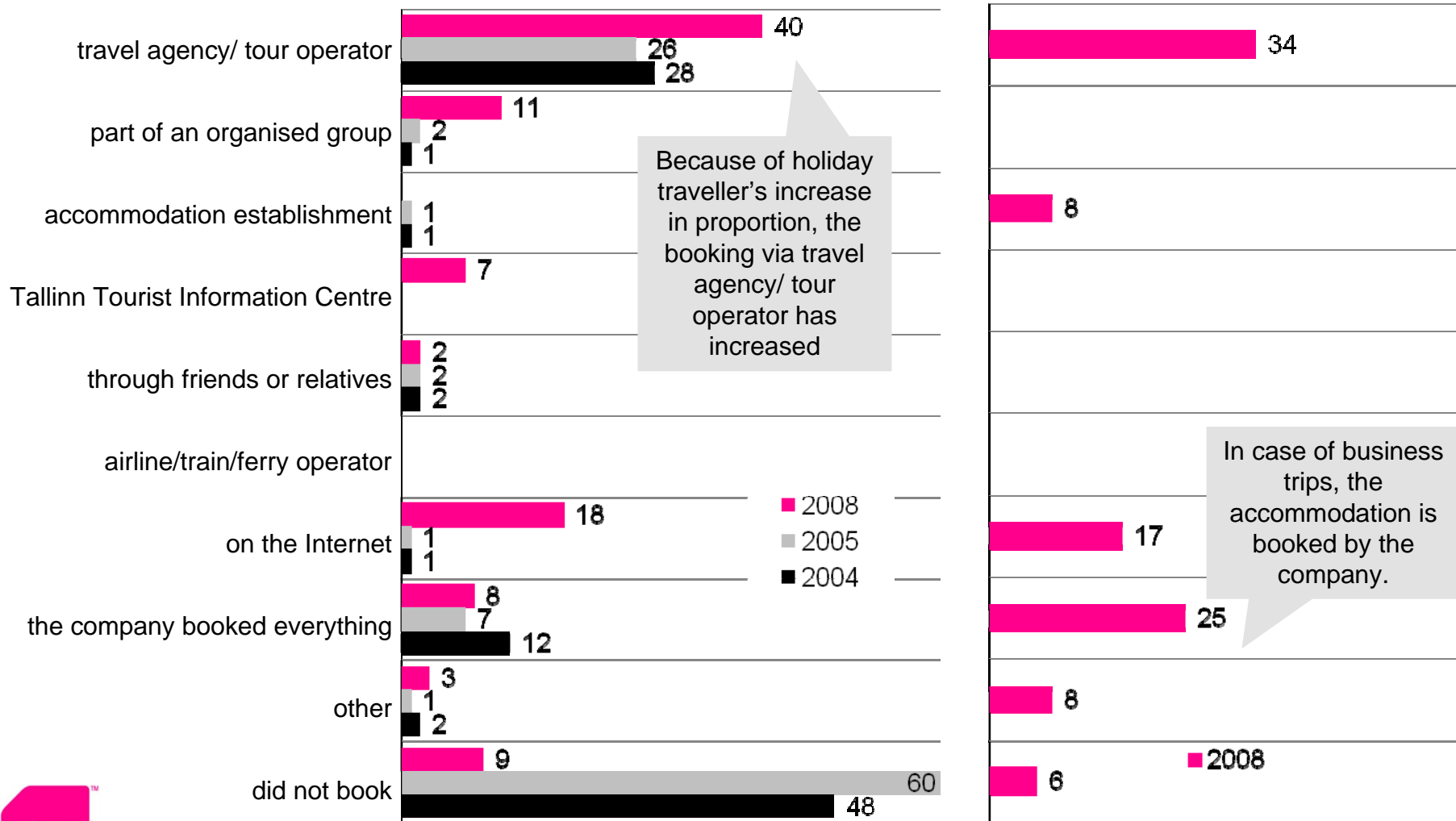


Booking accommodation

% of all the visitors who have arrived from a particular country, who have spent at least one night in Tallinn and who used accommodation (Russia 35 %, Latvia 53%)

Russia

Latvia



Because of holiday traveller's increase in proportion, the booking via travel agency/ tour operator has increased

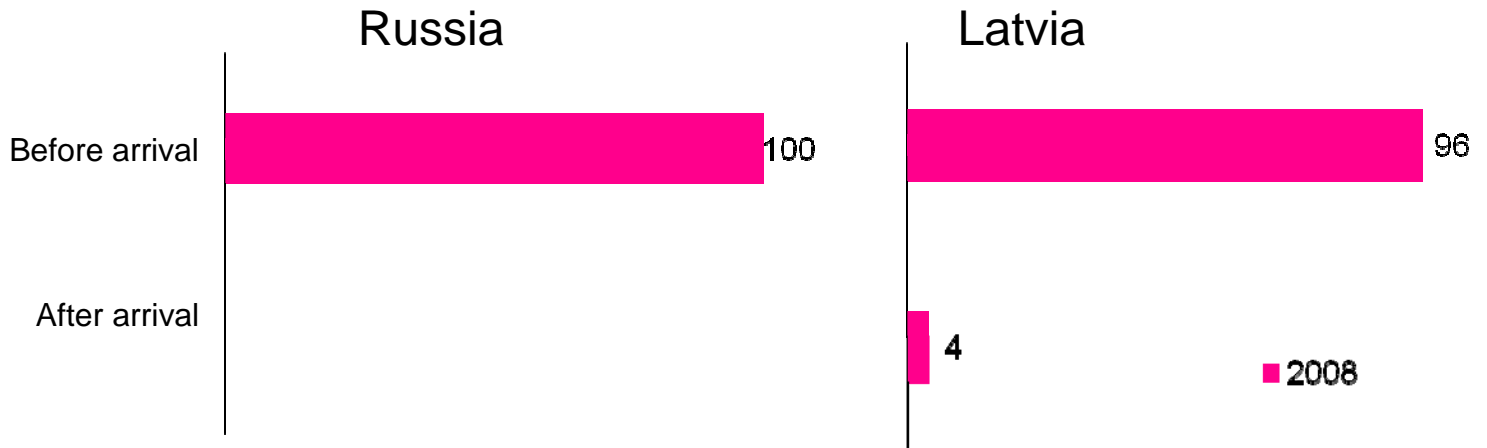
In case of business trips, the accommodation is booked by the company.



Differently from the previous surveys, in 2008 only visitors who had spent at least one night in accommodation establishments answered the question. So these visitors who did not book one's accommodation were not asked the question.

Booking accommodation

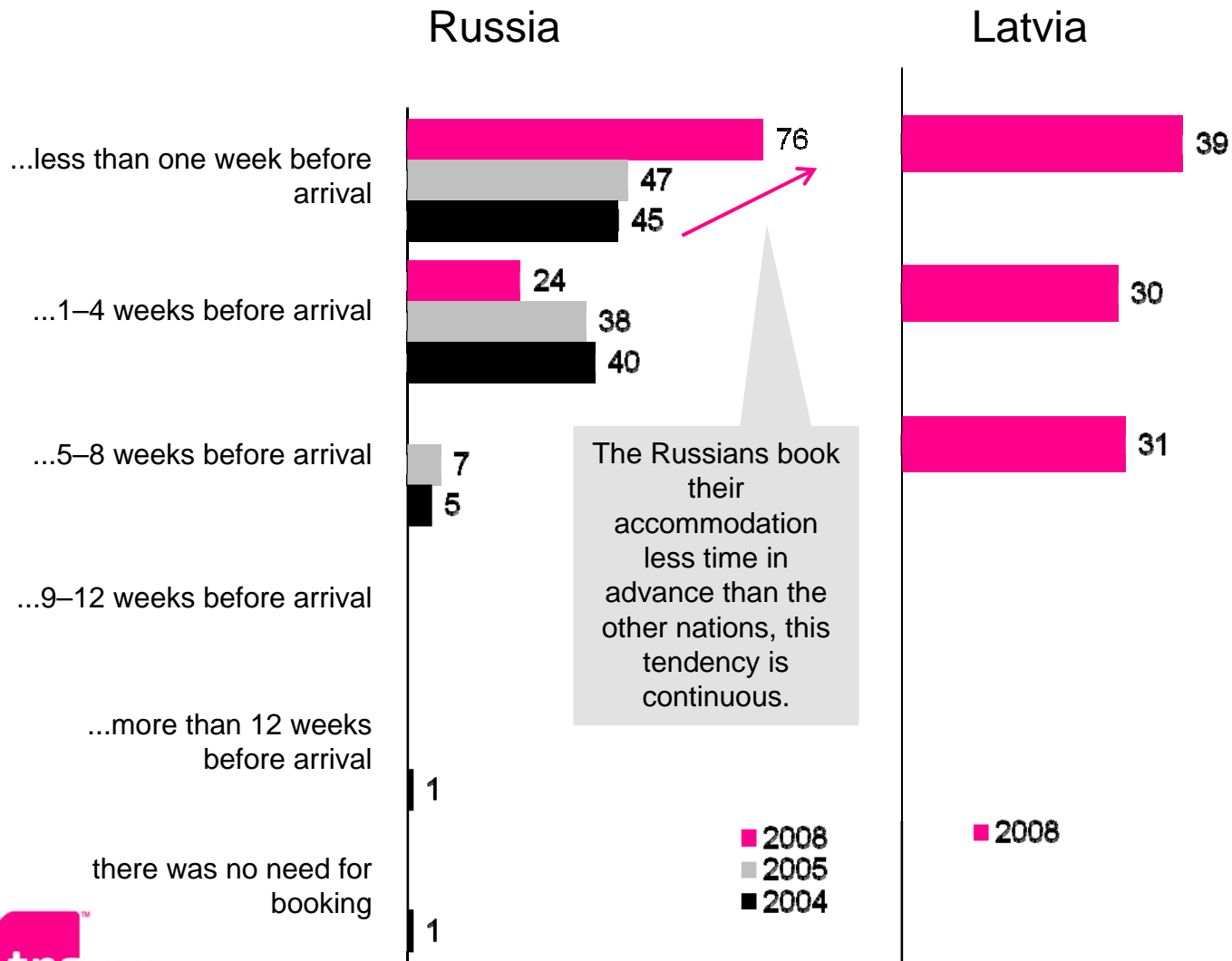
% of all the visitors who have arrived, who have spent at least one night in Tallinn staying in an accommodation establishment and who has booked one's accommodation (Russia 31 %, Latvia 49%)



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

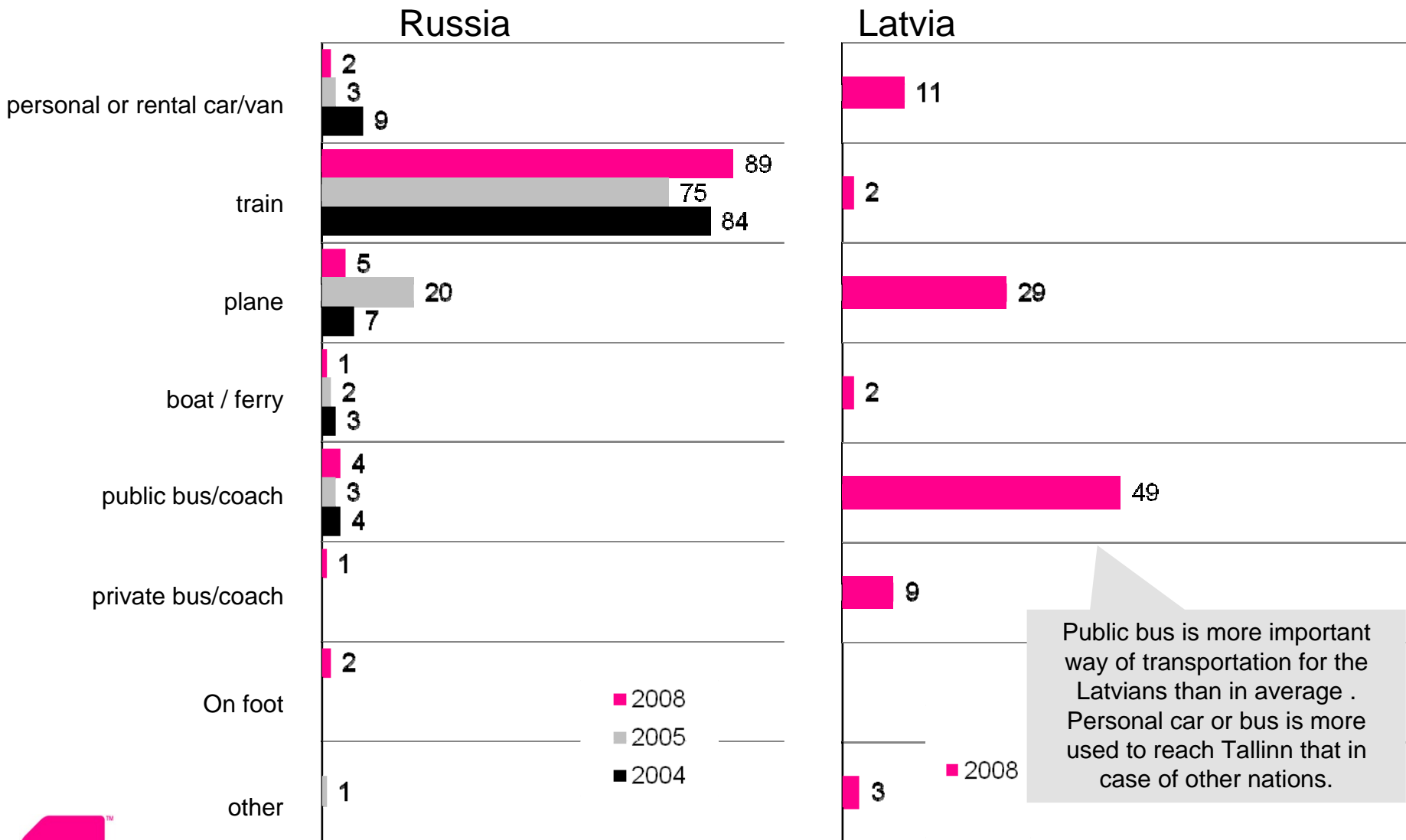
The time of booking one's accommodation

% 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
(Russia 31 %, Latvia 49 %)



Transportation to reach Tallinn

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



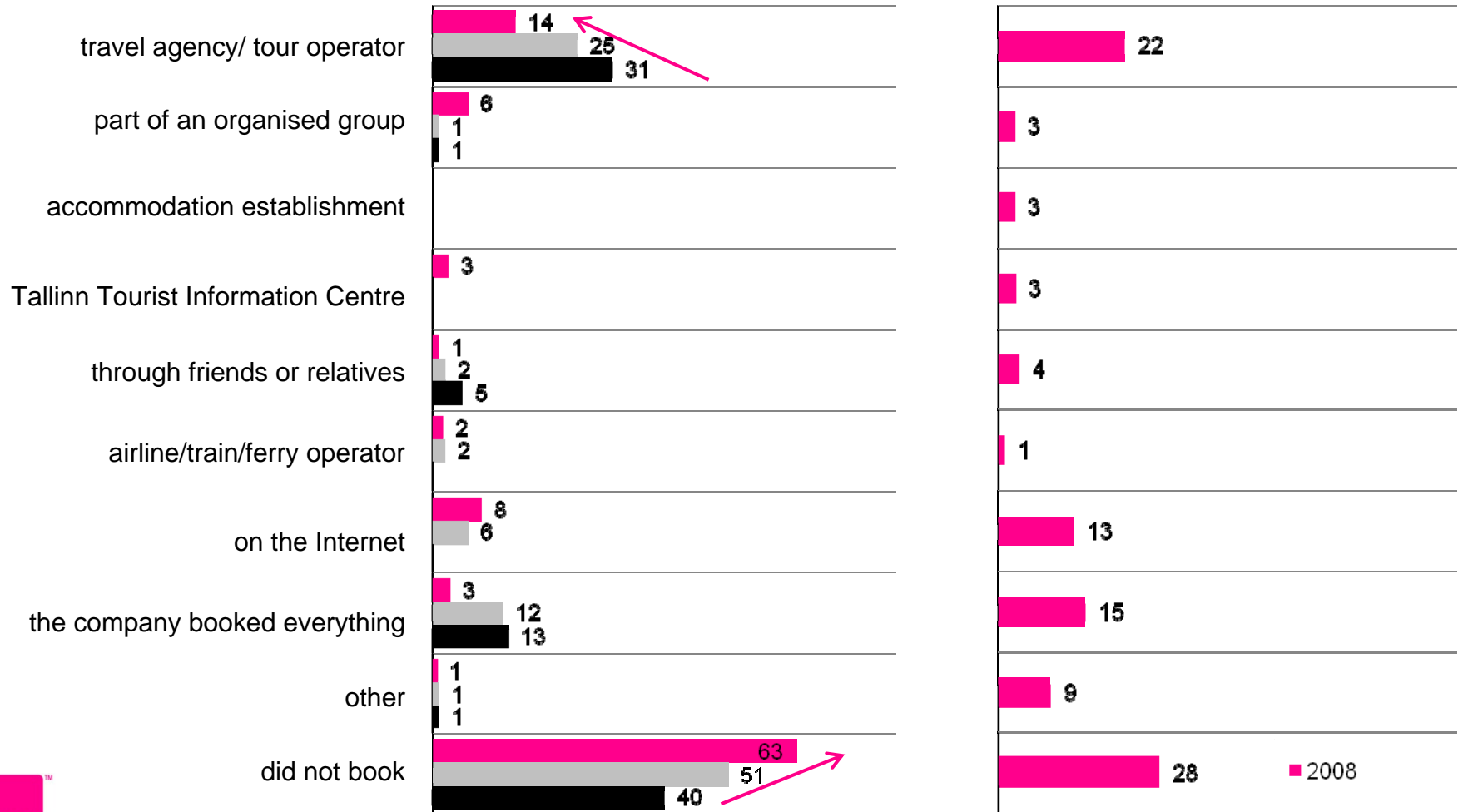
Public bus is more important way of transportation for the Latvians than in average . Personal car or bus is more used to reach Tallinn than in case of other nations.

Booking Transportation

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

Russia

Latvia

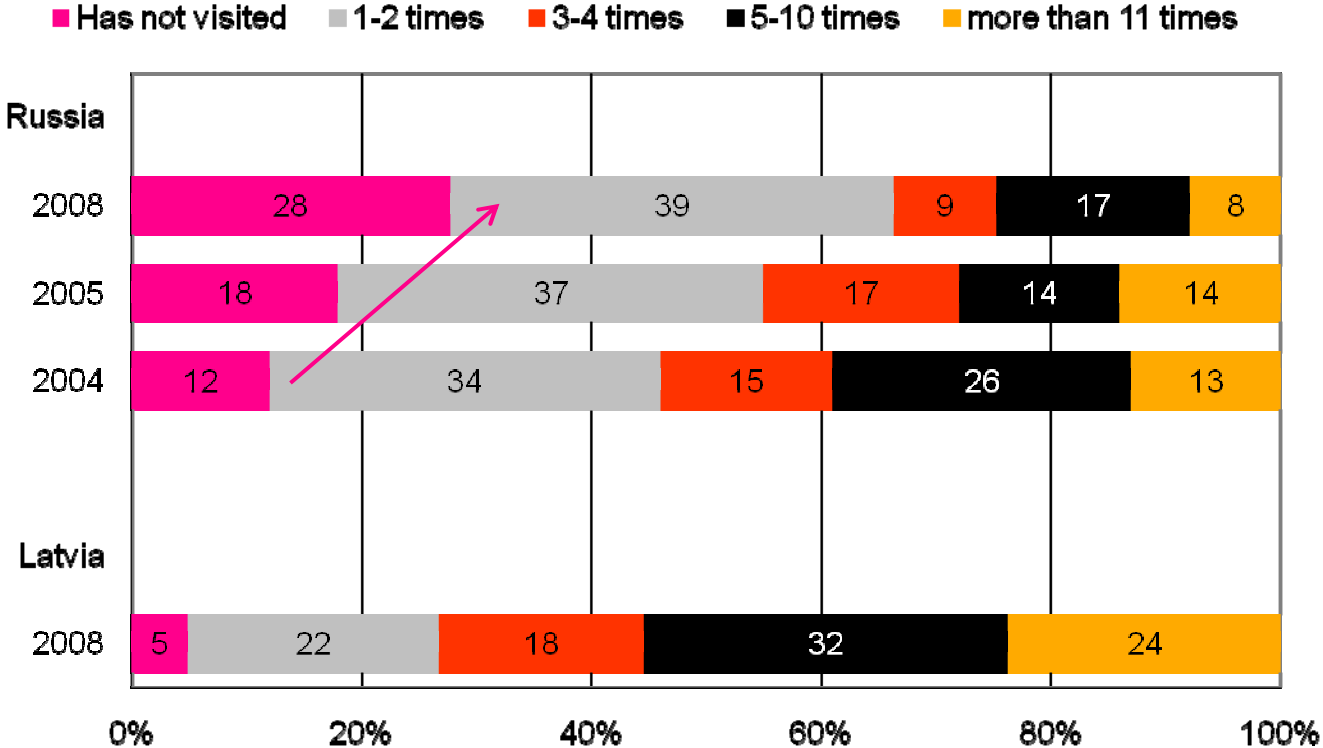


Tallinn



Number of previous visits to Tallinn

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



Average number of visits

3,9

11

7

8,5

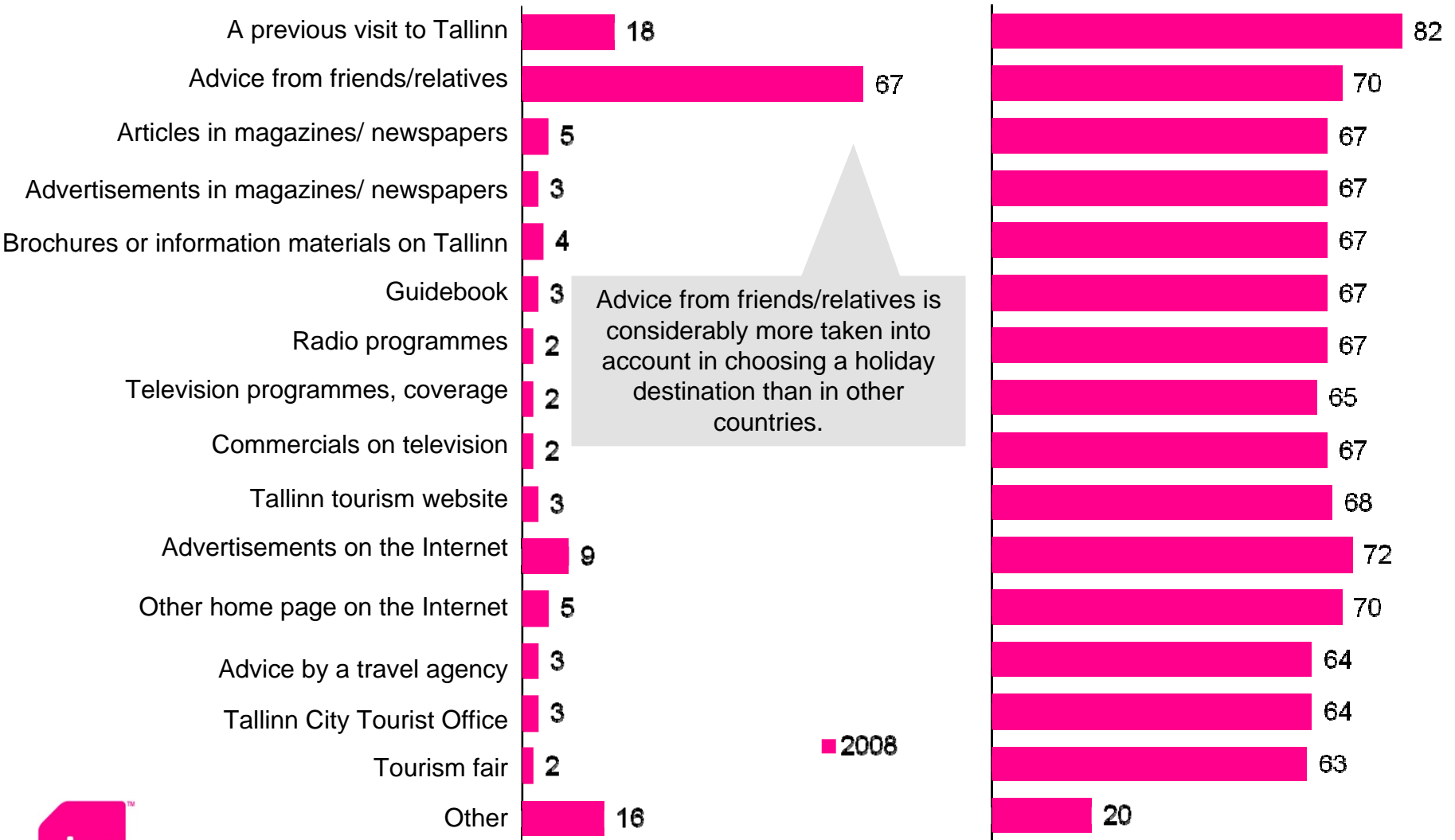
There are more and more visitors from Russia every year who come for the first time, this has lowered the average number of visits almost three times

Information sources about Tallinn

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

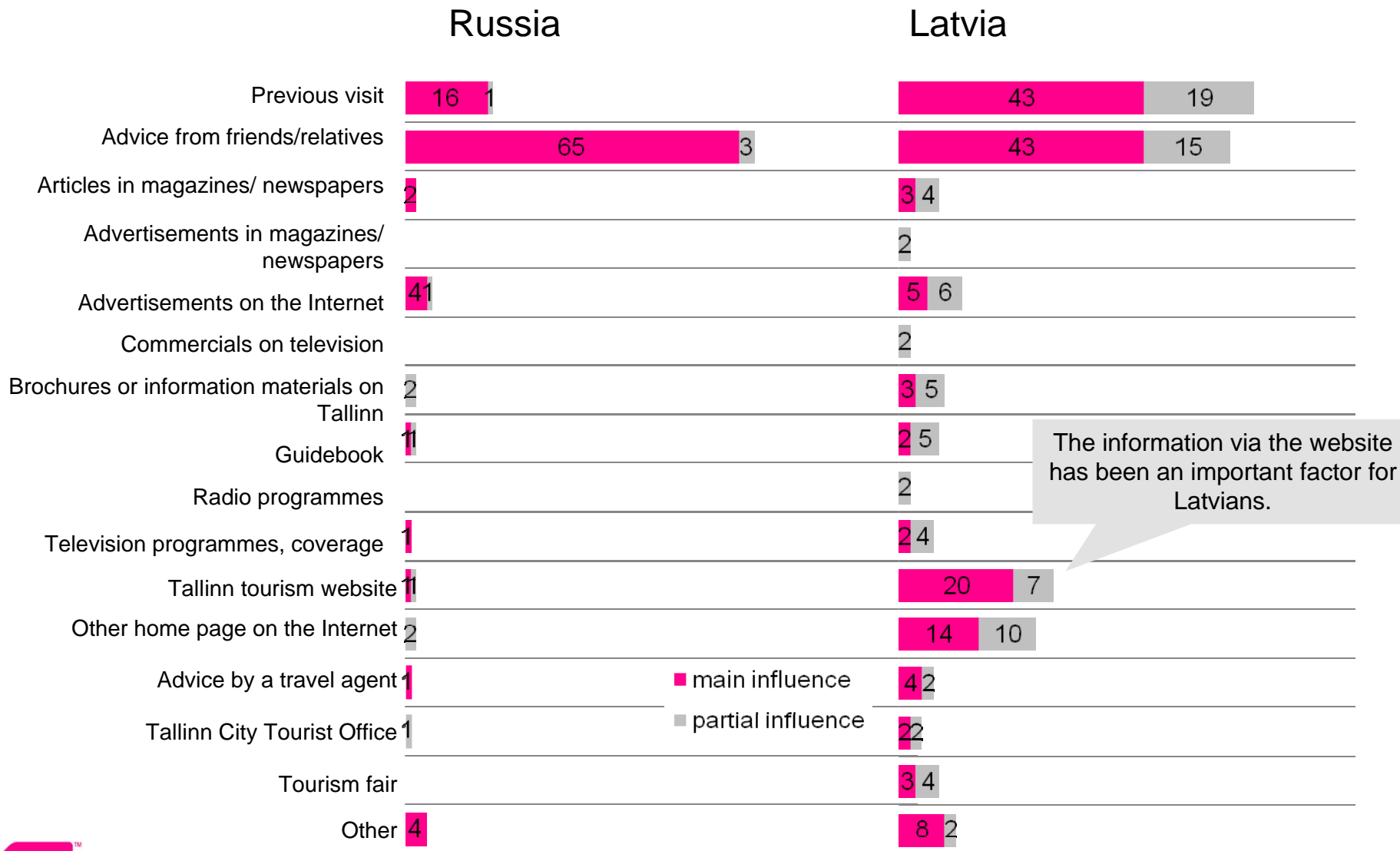
Russia

Latvia



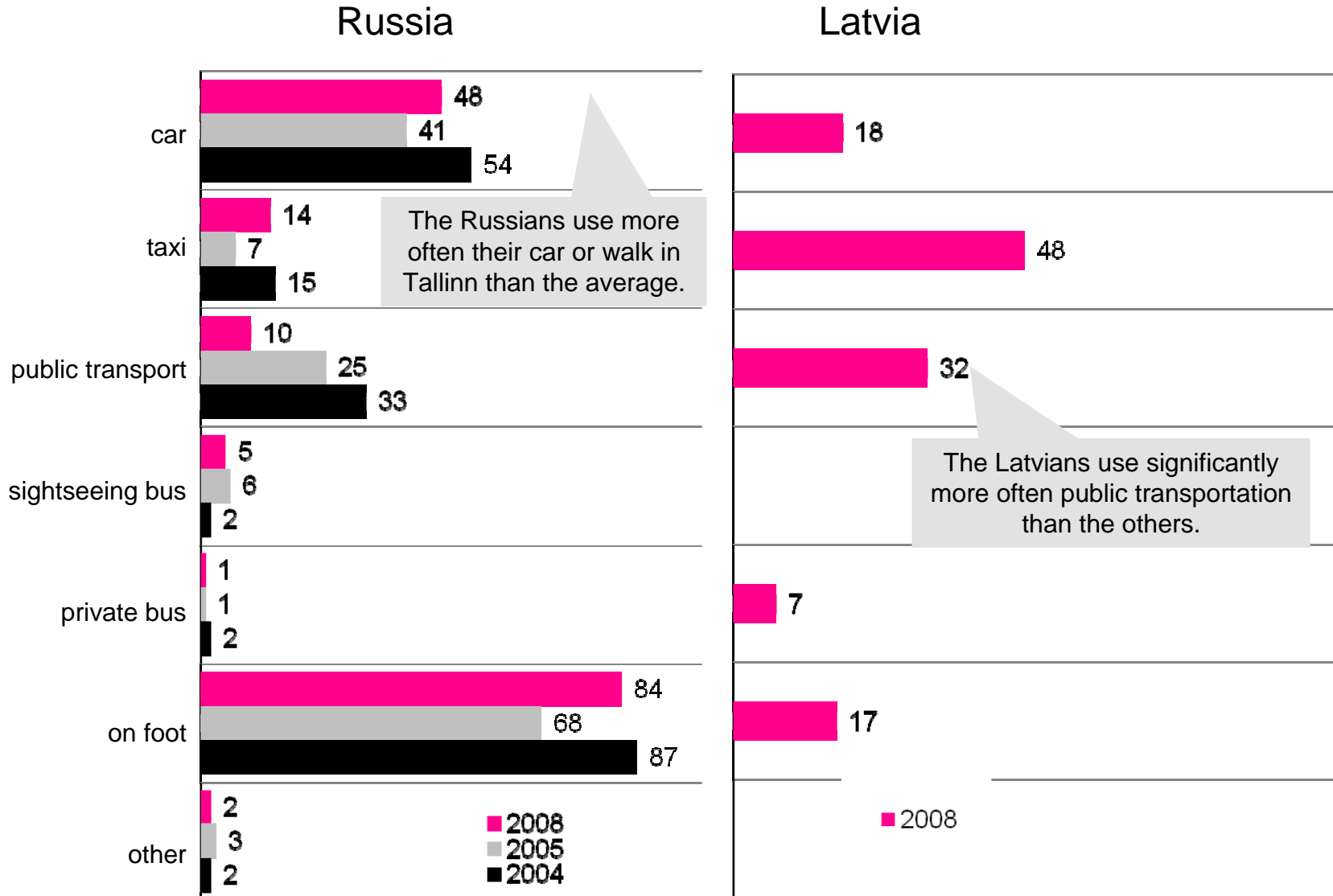
Factors that Influence Visiting Tallinn

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



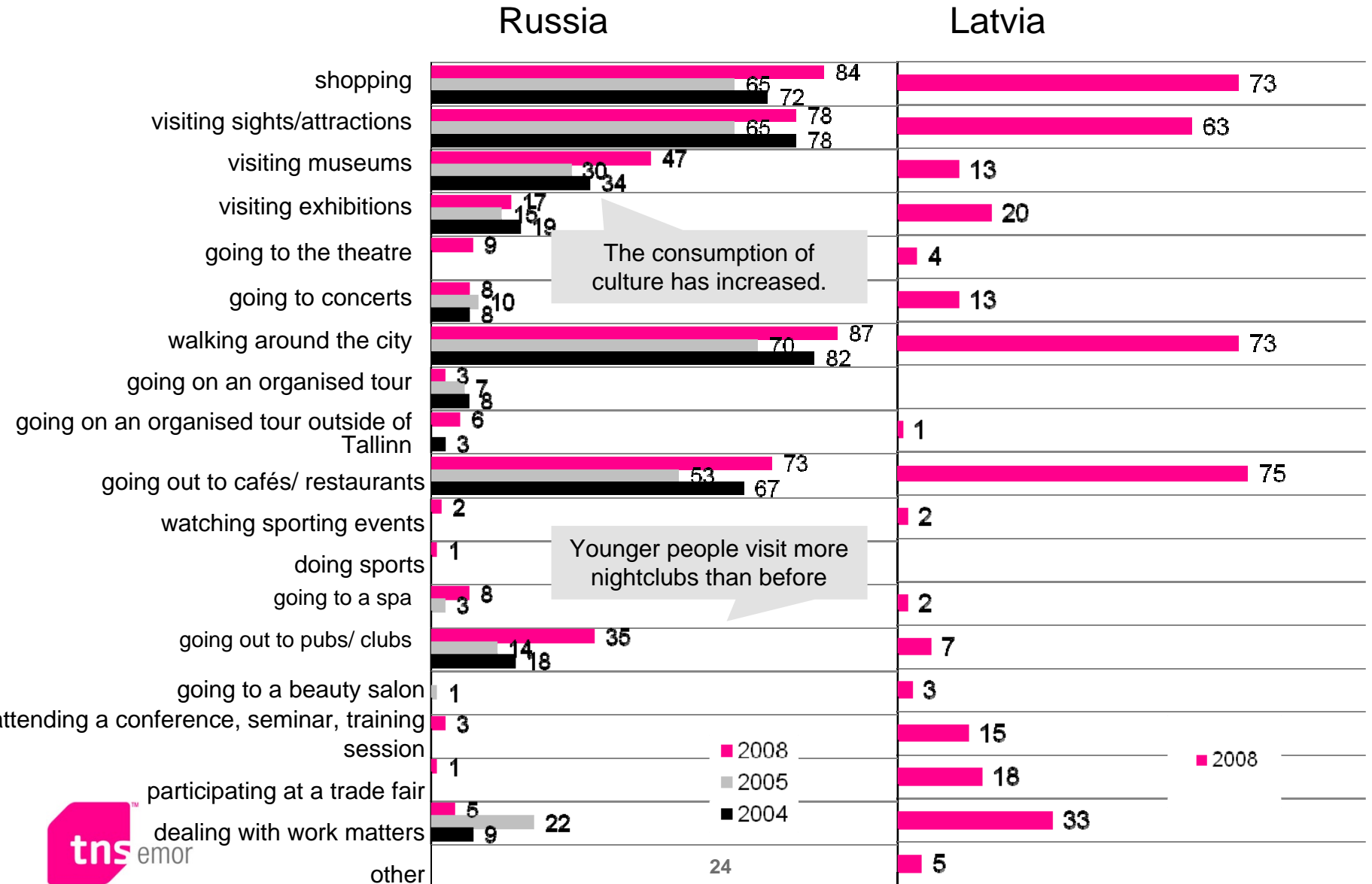
The Transportation Used in Tallinn

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



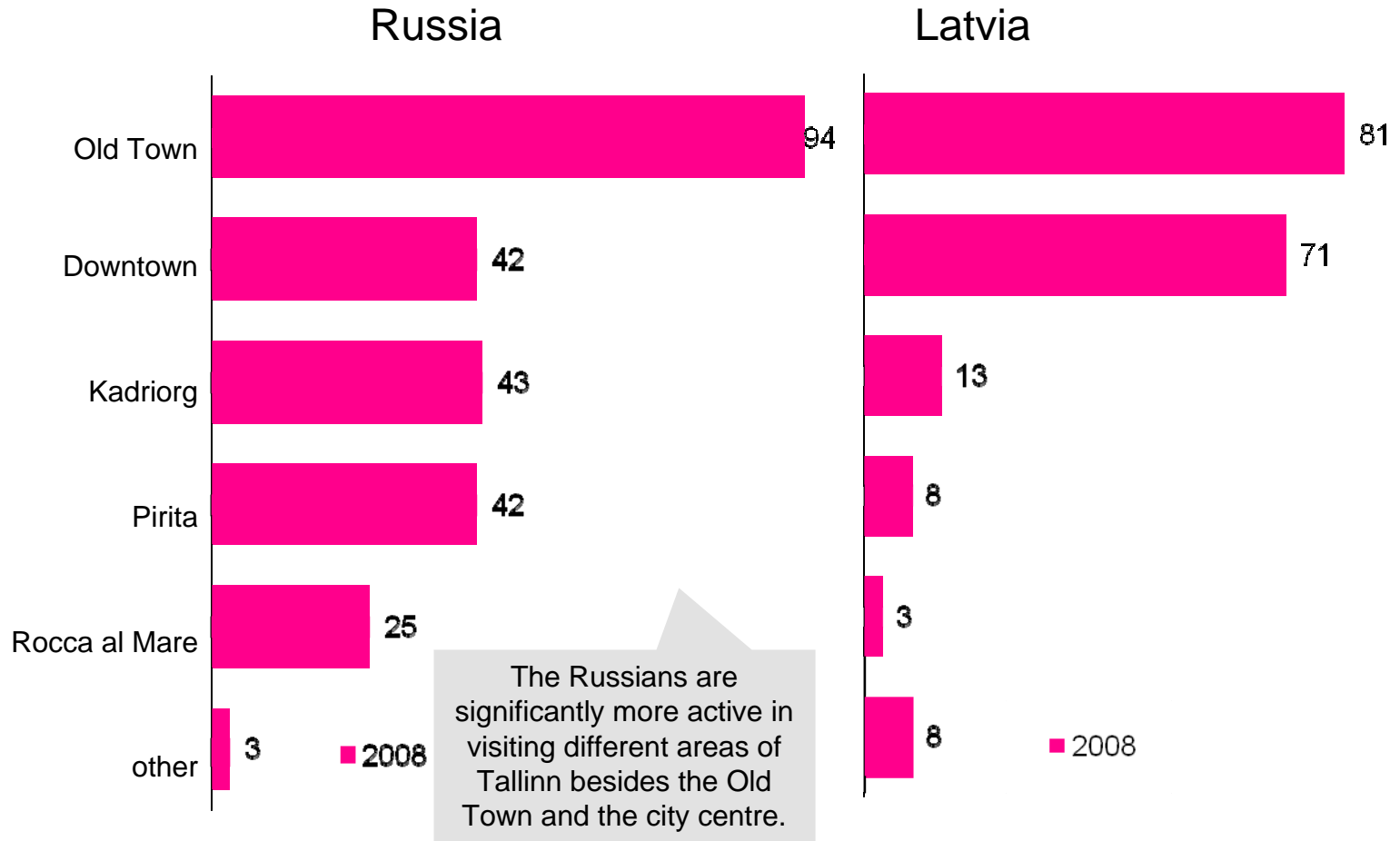
Activities in Tallinn

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



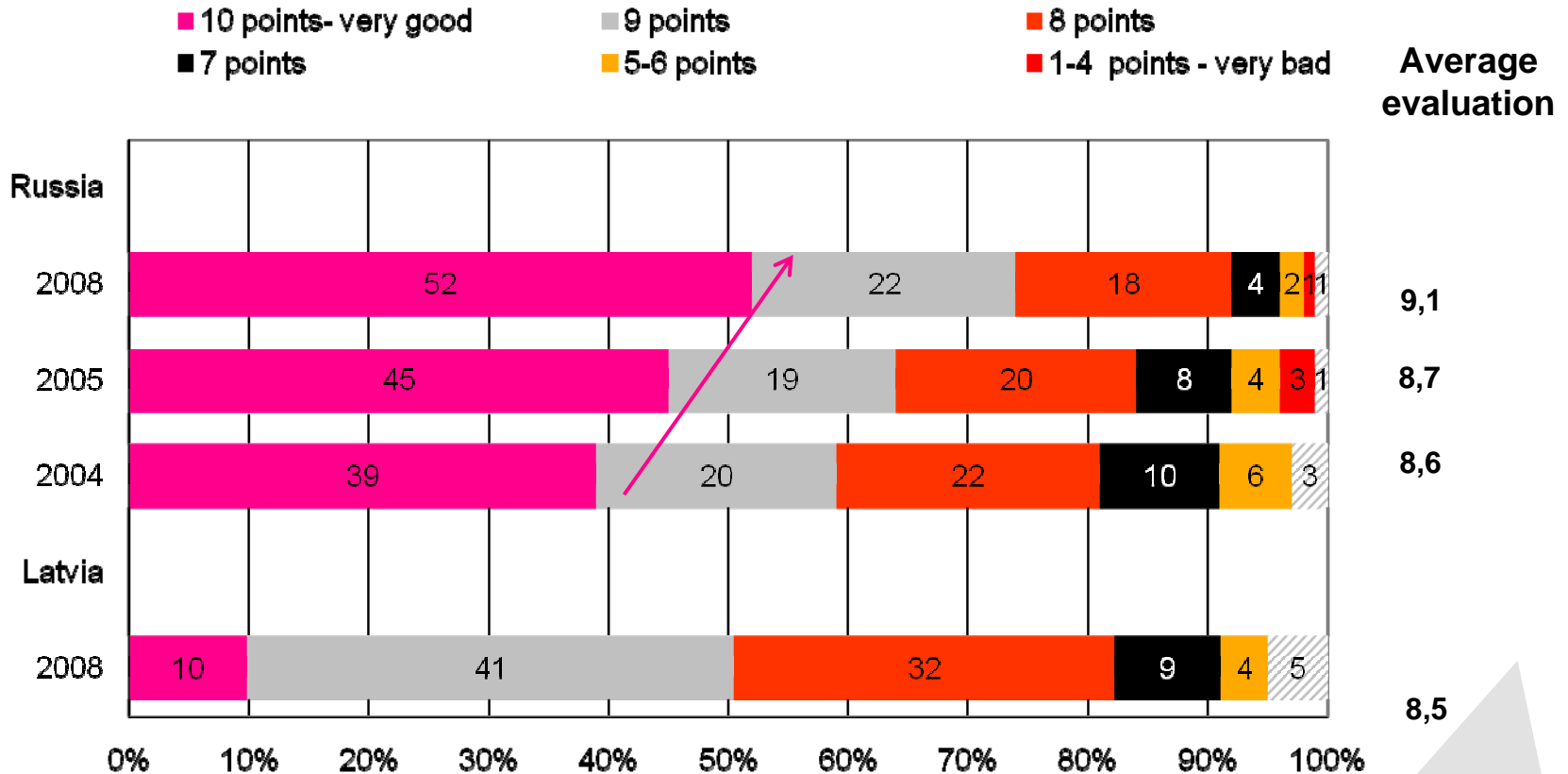
Areas in Tallinn Visited

% 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



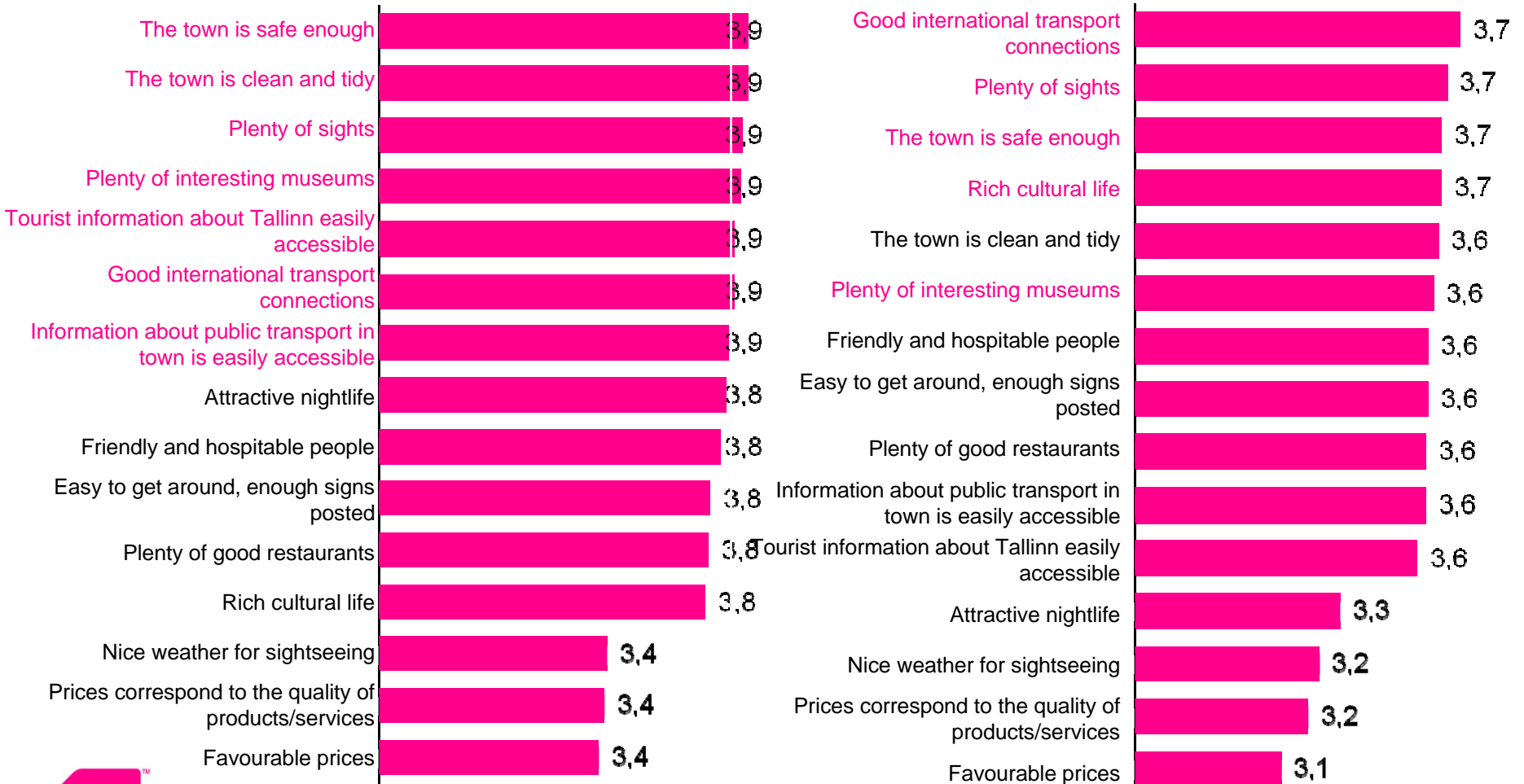
The evaluations to Tallinn by the Russians have increased every year and it is considerably higher than in case of other countries (in 2008 the maximum points were given by 52 % of Russians compared to the average of 19 %).

The Image of Tallinn

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

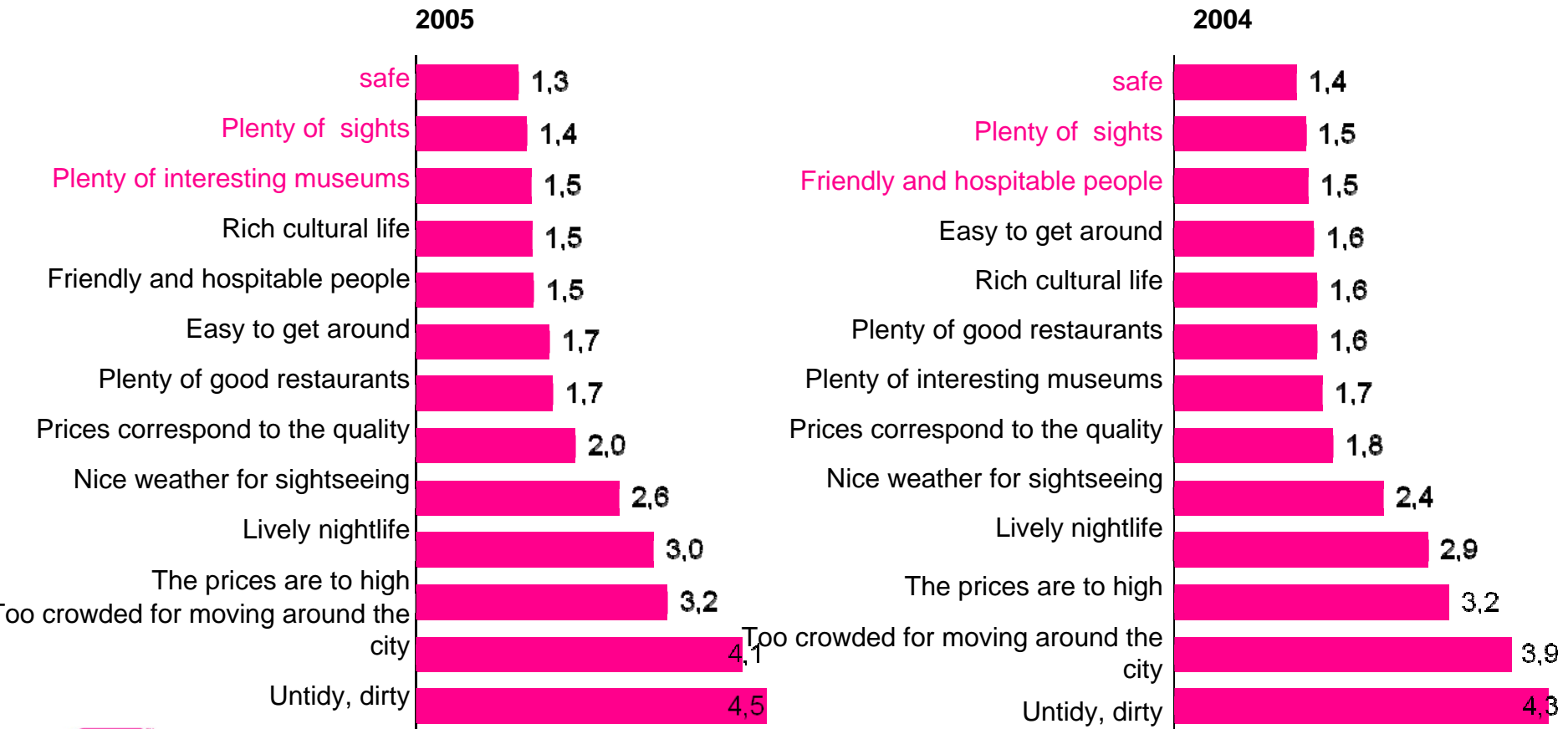
Russia*

Latvia



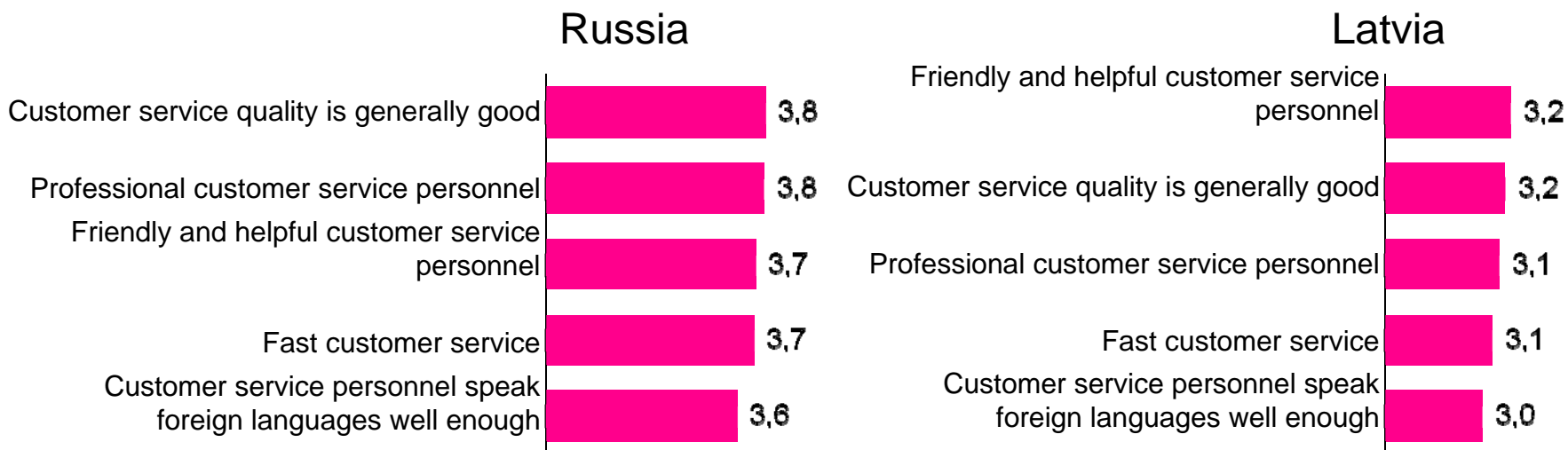
Tallinn image in the eye of Russians

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



Compared to other countries, the satisfaction of Russians is higher.

* 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.

Russia

Old Town

Restaurants, bars, eateries

Kadriorg, Kadriorg castle

Shops, shopping centres

Hotels

Town Hall Square and its

surroundings

Art centre, museum

Pirita and its surroundings

Toompea

Sports events and sports buildings

Latvia

Old Town

Restaurants, bars, eateries

Positive experience with Estonians

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.

Russia

Language problems

Cold or bad weather

Dirty or slippery streets

Not enough toilets in the streets

Expensive public transportation

Connected with hotels

Latvia

Language problems

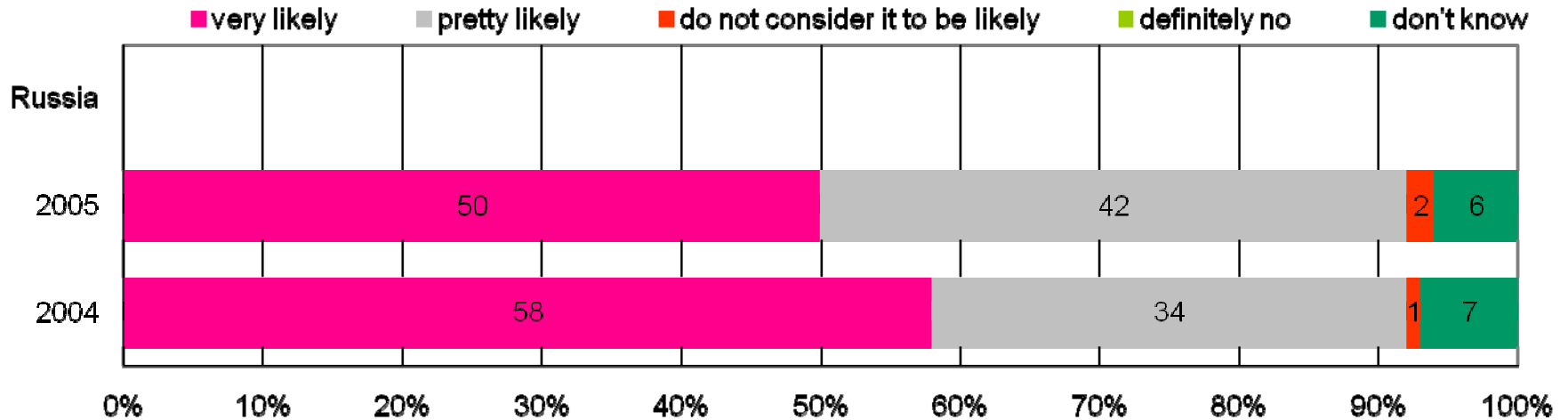
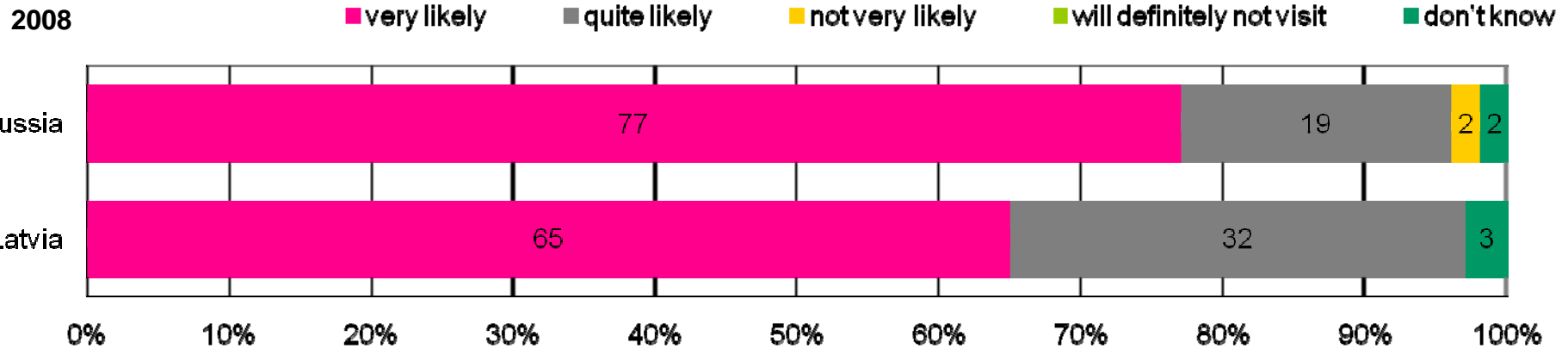
Cold or bad weather

Dirty or slippery streets

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? *

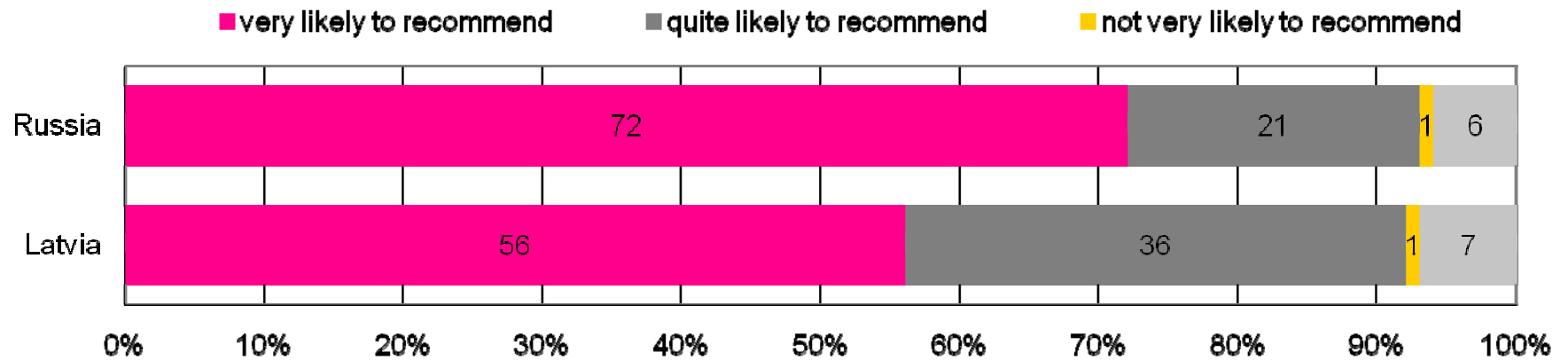


Recommendation communication

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

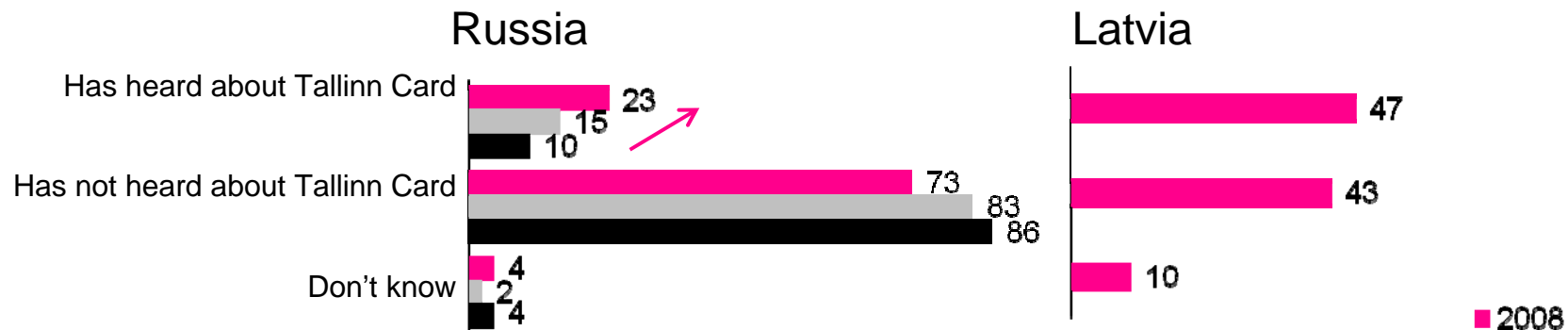
If your friends/relatives asked your advice about a holiday destination, how likely would you recommend Tallinn?

2008

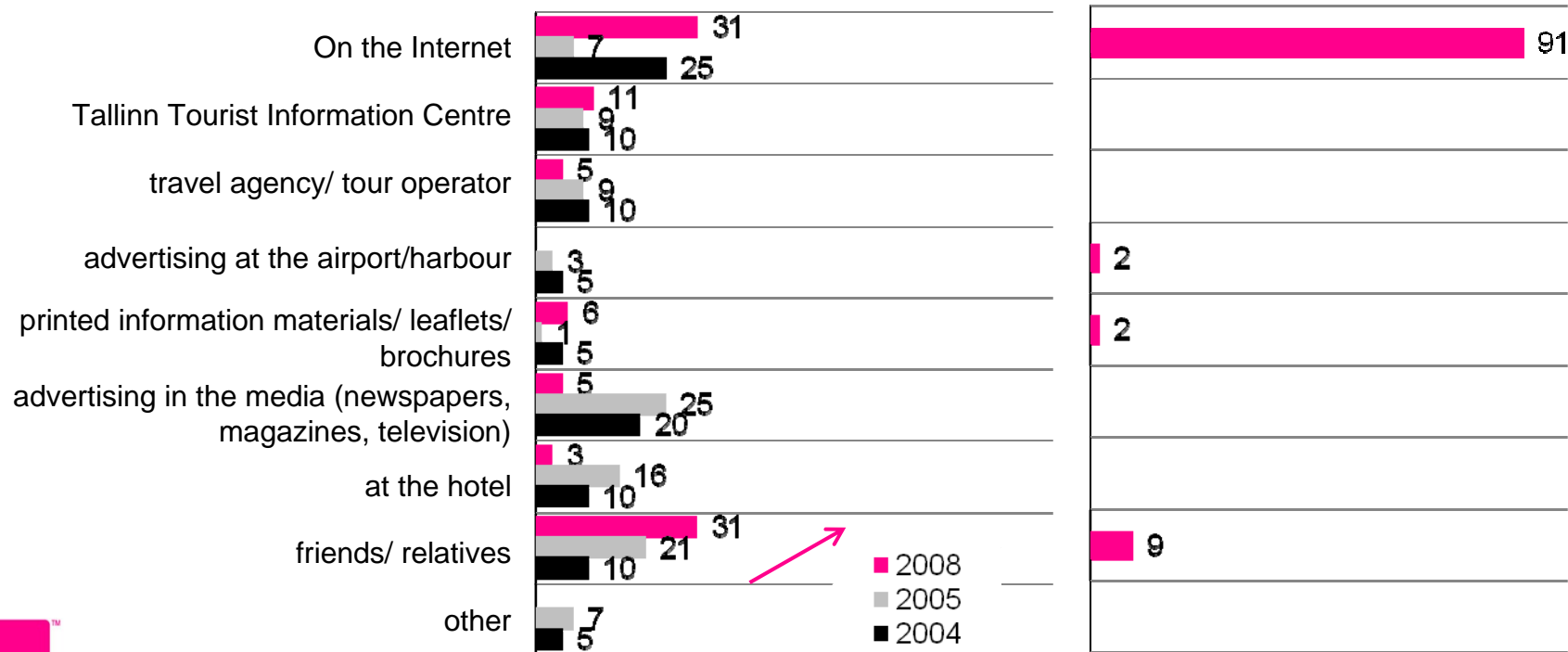


Information about Tallinn Card

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

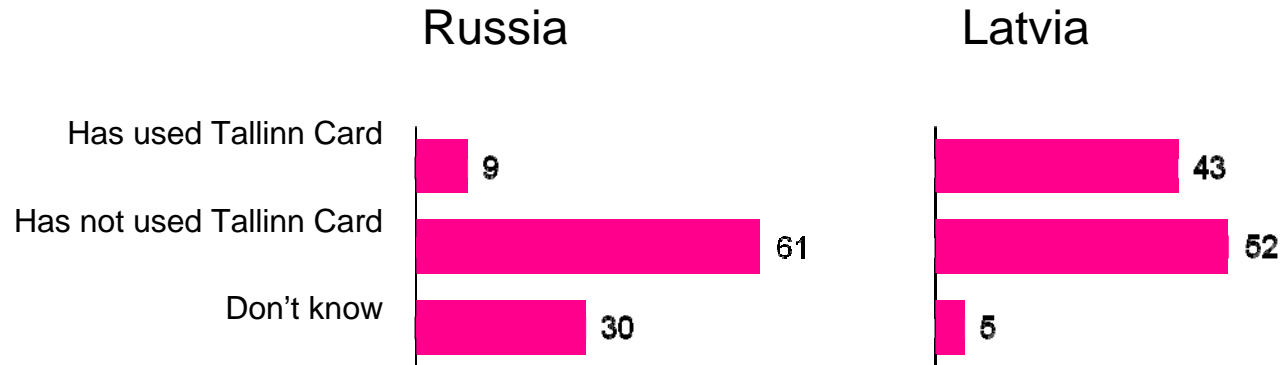


% of all the visitors who have heard about Tallinn Card



The Usage of Tallinn Card

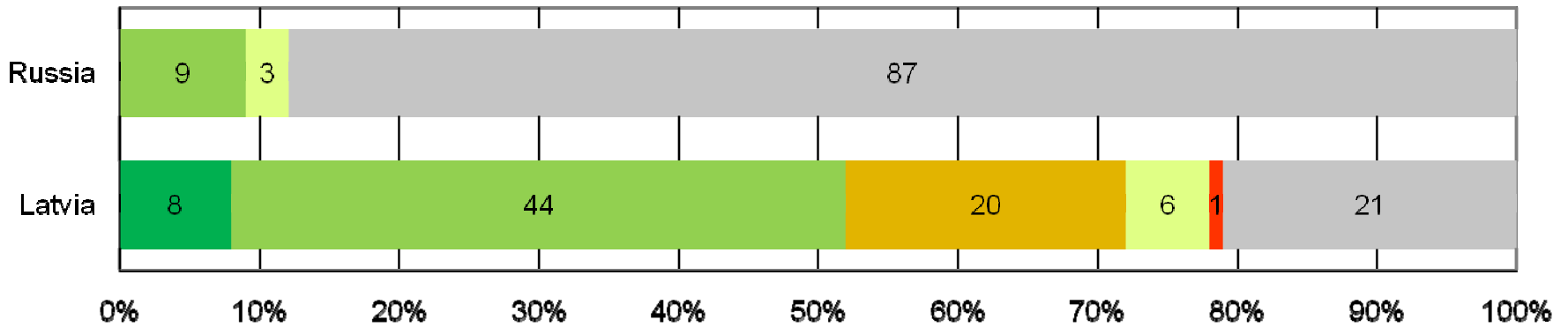
% of all the visitors who have heard about Tallinn Card (23% Russians and 47% Latvians)



Opinion about Tallinn Card

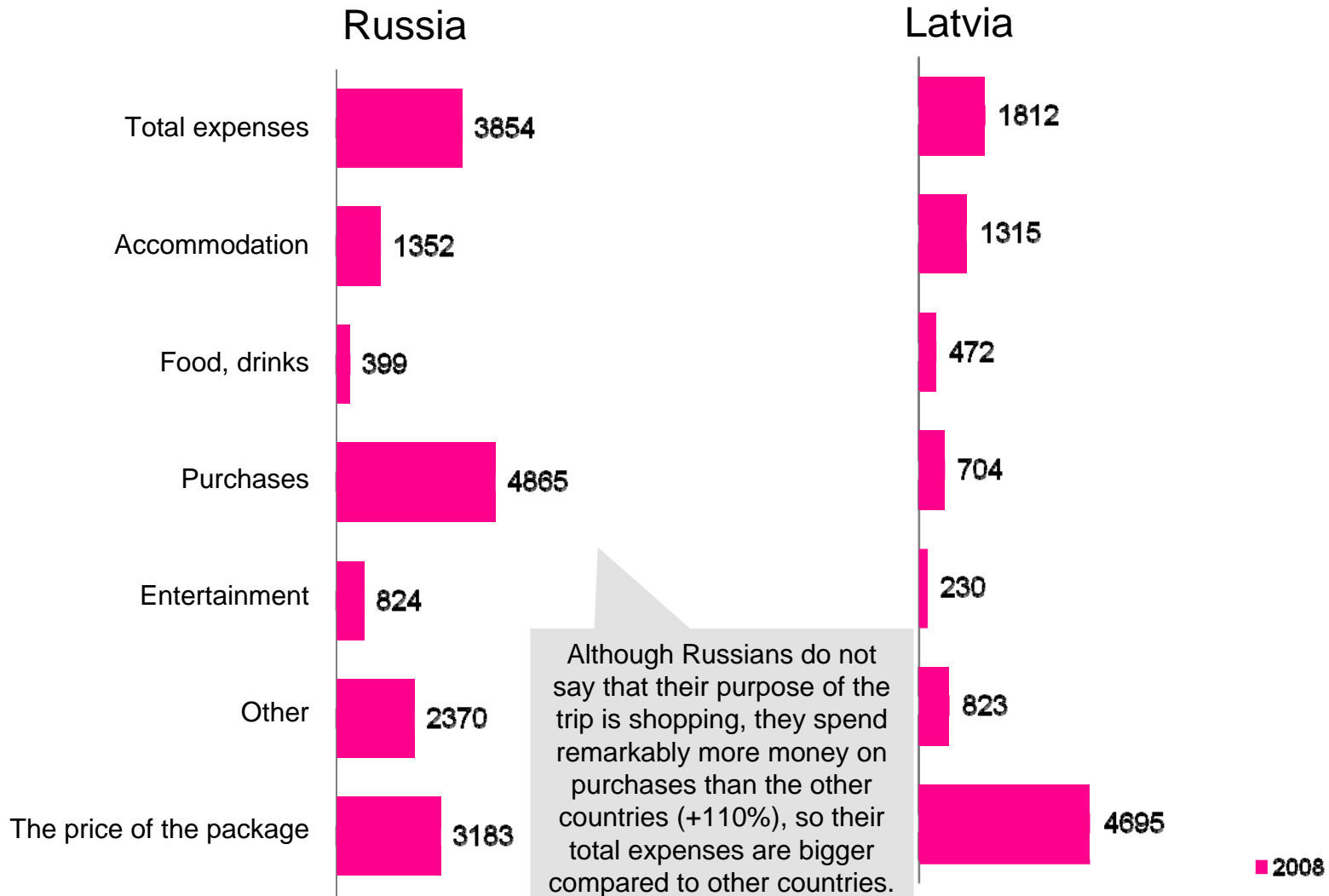
% of all the visitors who have heard about Tallinn Card (23% Russians and 47% Latvians)

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



Average expenditures per person per day

Average expenditures per person



Summary



Latvian foreign visitors

2%* of all Tallinn foreign visitors

- In 2008 about 61 000* people arrived from Latvia.
- Latvia's socio-demographic profile structure is very similar to the average, this means that it does not differentiate from the structure of visitors from the other countries. However, the larger proportion of younger people (15-24 years) and students can be sighted.
- For most of the Latvians Tallinn is the only destination during the trip (80%) and these are mainly business trips (41 % business trip, 11 % attending a training, seminar, conference, 7% incentive trip paid by the employer). Latvians spend away from home relatively long time (up to a week), however they stay in Tallinn for 2,6 night in average. Compared to the other countries Latvians stay overnight more in cheaper hotels and use a public transportation for moving around in Tallinn. They reach Tallinn by a public bus or by car. For quarter (25%) of Latvians the transportation for reaching Tallinn was booked by the company they work for.
- They are relatively less Latvians who visit Tallinn for the first time (5%), the average number of visits is 8,5. Taking into account the fact that there is not many first time visitors, the Latvians consider the main information source about Tallinn and the greatest influence in coming back, their previous visit. However, the information via the Internet is important as well for Latvians.
- In Tallinn Latvians prefer to visit sights, go shopping, walk around the city and visit cafes/ restaurants. As previously mentioned, the proportion of business trips is larger than in average. Latvians move around the city relatively little, most of them visit only old town and city centre.
- Latvians' satisfaction with Tallinn is broadly speaking high. Almost all Latvians are more or less likely to visit Tallinn

Approximately half (47%) of Latvians have heard about Tallinn Card and 43 % of those have used it.

Russian foreign visitors (1)

7%* of all Tallinn foreign visitors

- Differently from other countries the proportion of foreign visitors from Russia has slightly increased (7% in 2008 vs 4 % in 2005). In 2008 about 191 000* people arrived from Russia (in 2005 112 000).
- Compared to previous surveys and other countries, there are considerably **more young people, students or skilled workers**. The proportion of older people has dropped and this has caused changes in the travelling behaviour.
- The proportion of these Russians who visit only Tallinn during their trip has increased significantly and these people are coming mainly on a **holiday**. Compared to other countries the proportion of business, shopping and wellness trips is small.
- The number of Russians who have stayed overnight has increased, however the length of a trip has become shorter, it is now 7 nights in average (compared to 9 nights in 2005). The increase in the number of those who stay overnight has not increased the proportion of people staying in accommodation establishments, over half of the Russians **stay overnight at friends/relatives** (48% in 2005 vs 59% in 2008).
- Those Russians who stay overnight in accommodation establishments, have mainly booked one's accommodation, however in a very short time - 76% book less than a week before arrival. This tendency was sighted in previous years as well, but now it has increased considerably. The main transportation to reach Tallinn is train.
- The number of **first time visitors from Russia has increased** every year, this has decreased the average number of visits almost 3 times (11 in 2005 vs 3,9 in 2008). Compared to other countries Russians take the **advice of friends and relatives more into consideration than the others**.

Russian foreign visitors (2)

7%* of all Tallinn foreign visitors

- The increase in the proportion of younger foreign visitors has caused changes in the activities took up in Tallinn. As a positive trend **the increased consumption of culture** can be brought out (visiting museums, exhibitions and concerts), **going out to nightclubs, cafes/ restaurants** has increased as well. Walking around the city, sightseeing and shopping are still the favorite activities. In comparison with other nations the Russians are **more active** in visiting other areas in Tallinn as well, besides old town and the city centre.
- **The satisfaction** with the city's different aspects (the service culture, transportation etc) among the Russians is significantly **higher than the average**, this has increased compared with previous studies. **Almost all Russians are eager to visit Tallinn in the next 5 years** and recommend it to their friends and relatives.
- Russians do not know much about Tallinn Card and use it rarely- only 23% of them had heard about it and only 9% of those had used it. Most of them could not evaluate the price for value of the Tallinn Card.
- Although Russians do not say that their purpose of the trip is shopping, **they spend remarkably more money on purchases** than the other countries (+110%), so their total expenses are bigger compared to other countries