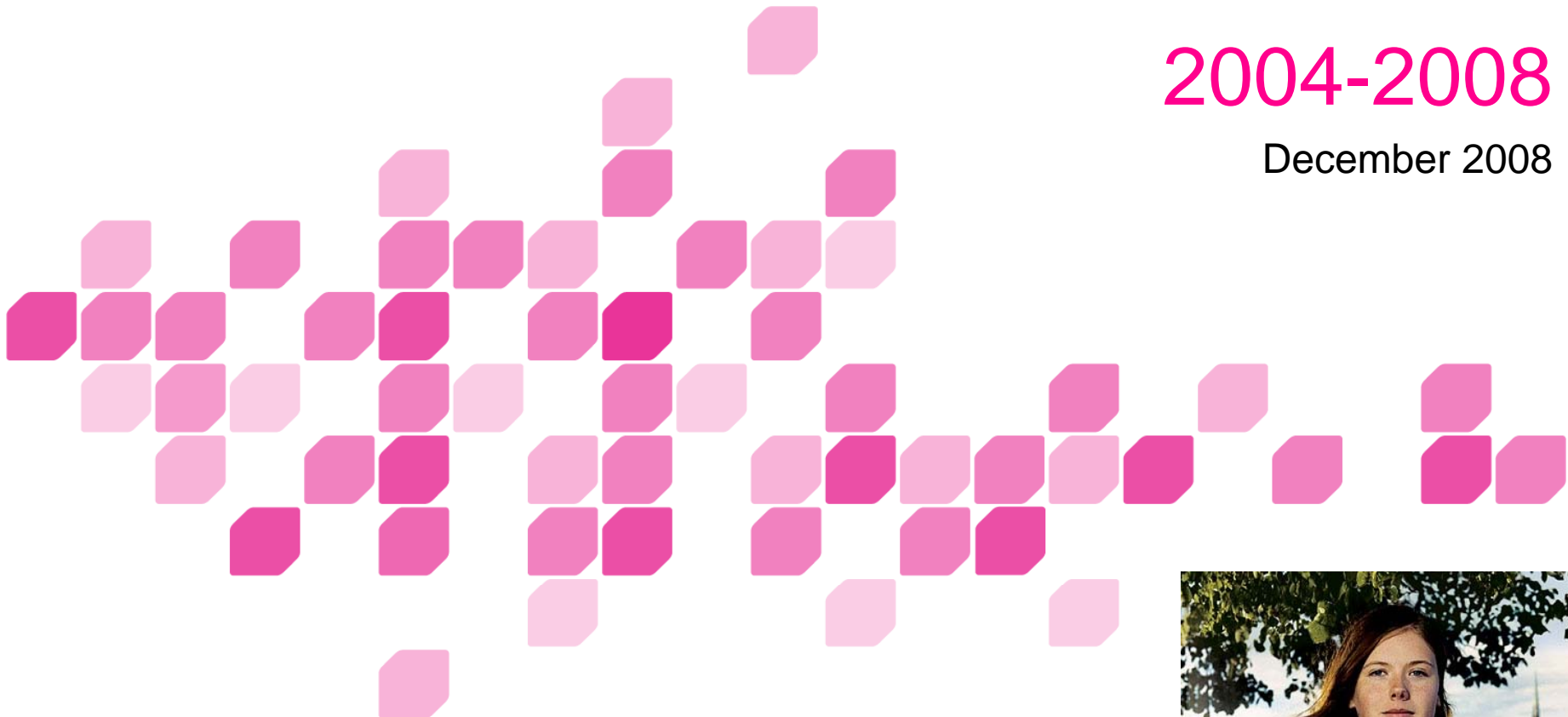


Cruise

2004-2008

December 2008

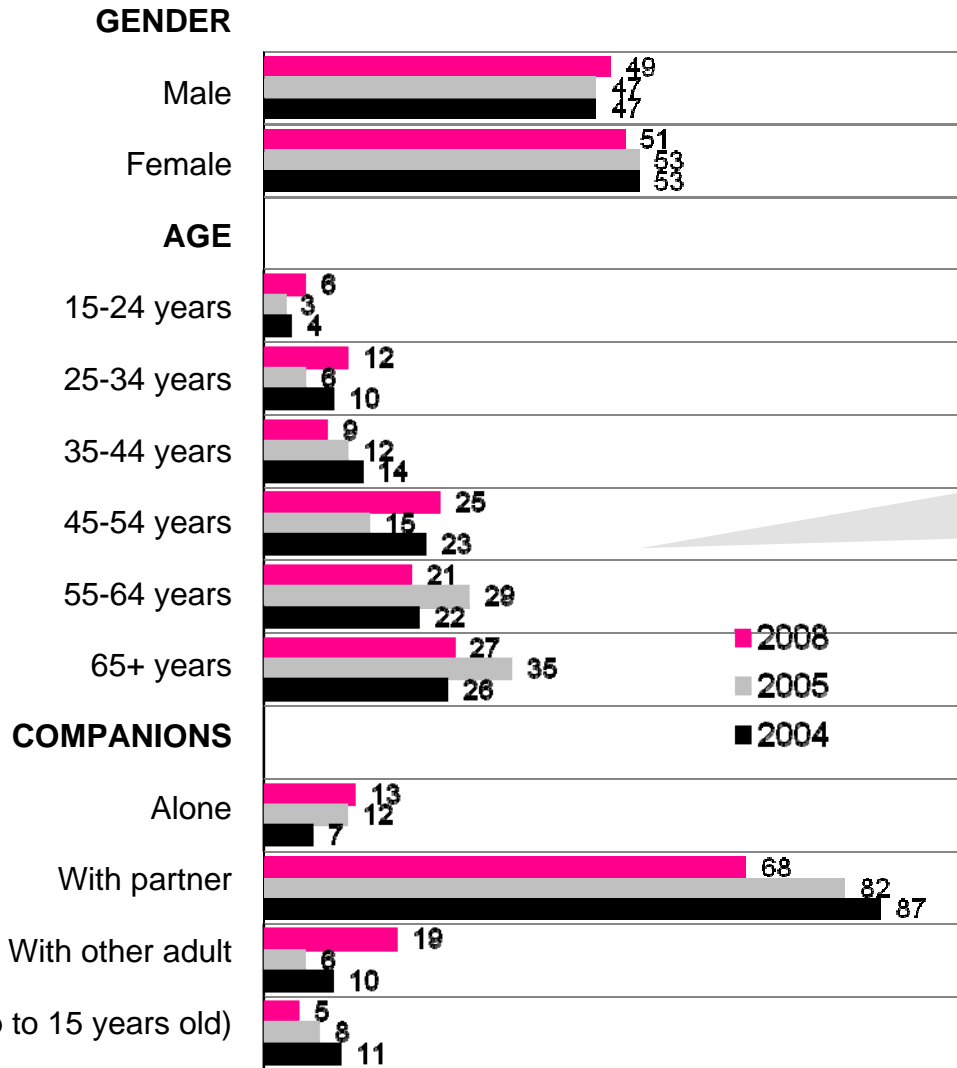


Sample

- Sample size:
 - 2008 – 154 visitors
 - 2005 – 153 visitors
 - 2004 – 104 visitors
- All the visitors were questioned in the terminals of cruise ship companies.
- According to the 2008 II weighing the cruise voyagers can be divided by countries in the following way:
 - United States of America 24%,
 - Germany 19%,
 - Great Britain 23%,
 - Norway 5%,
 - Other countries 29% (including Austria, Canada, France, Spain, Netherlands, Italy etc
- The research results in this report are presented according to the weighing methodology I (See Appendix 4).

Respondent Profile (1)

% of all cruise voyagers arrived

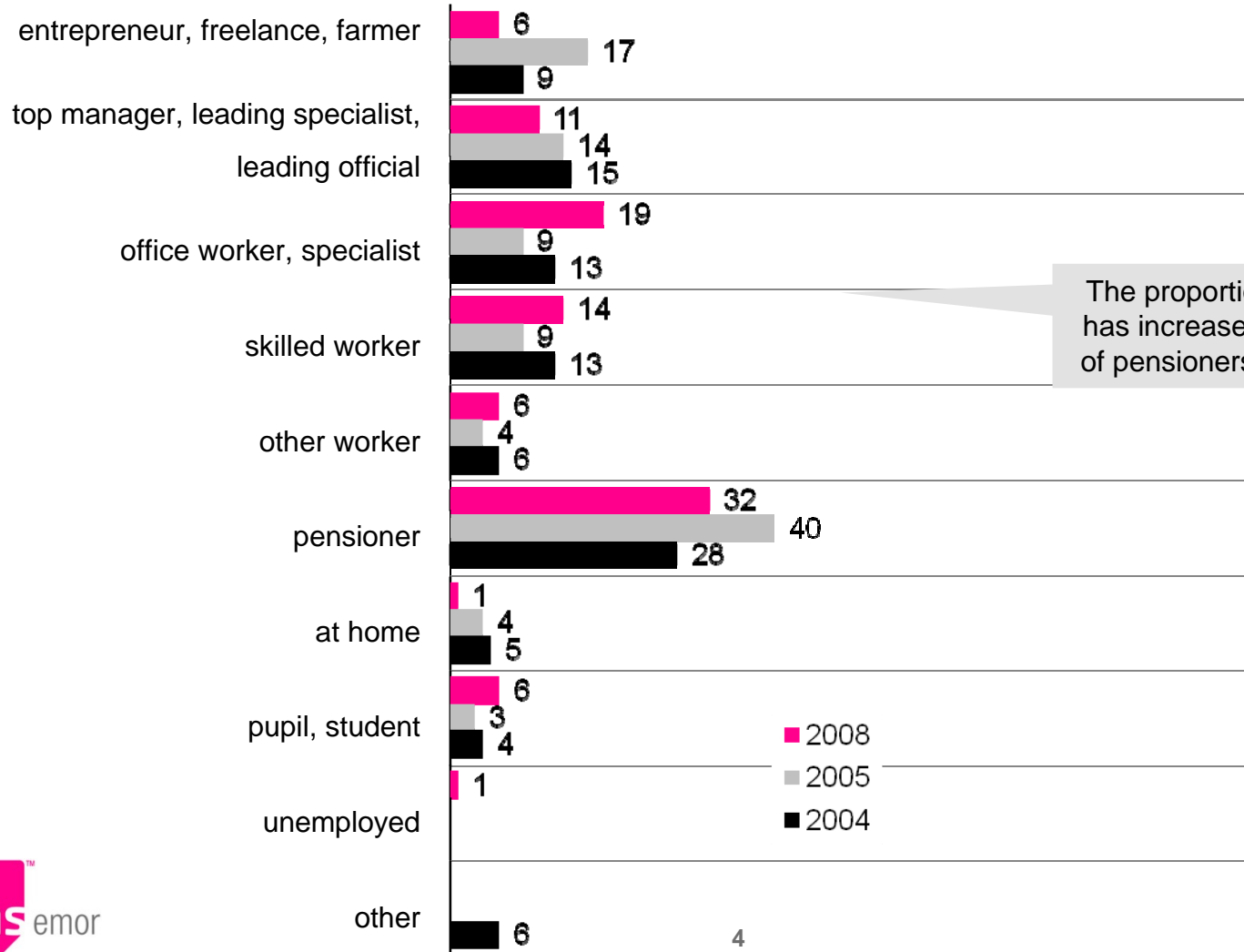


The proportion of older people has dropped - half (48%) are 55 year olds and older (compared to two thirds in 2005).

Respondent Profile (2)

% of all cruise voyagers arrived

STATUS



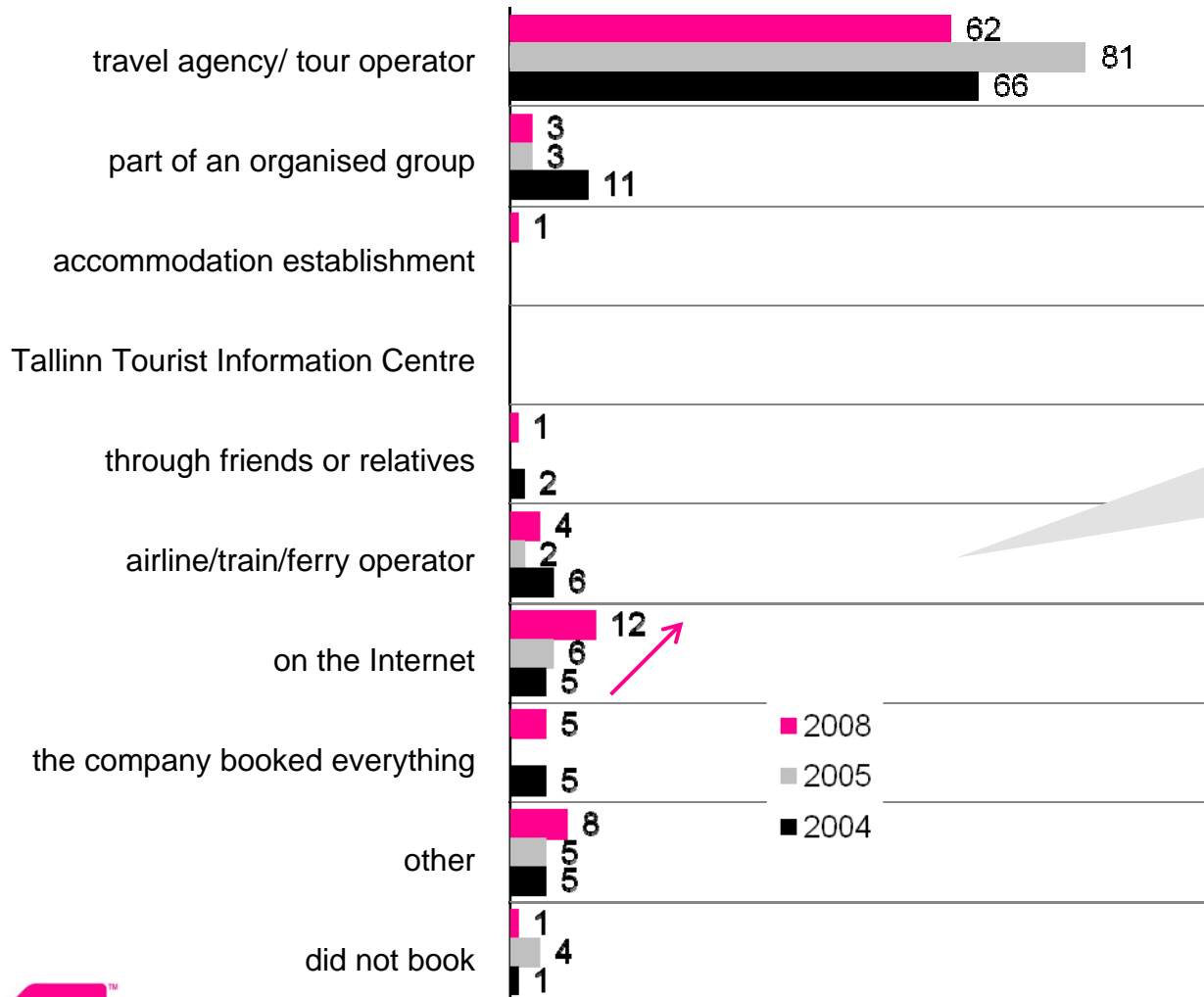
The proportion of employees has increased, the proportion of pensioners has decreased.

Before arriving to Tallinn



Booking the Trip

% of all cruise voyagers arrived

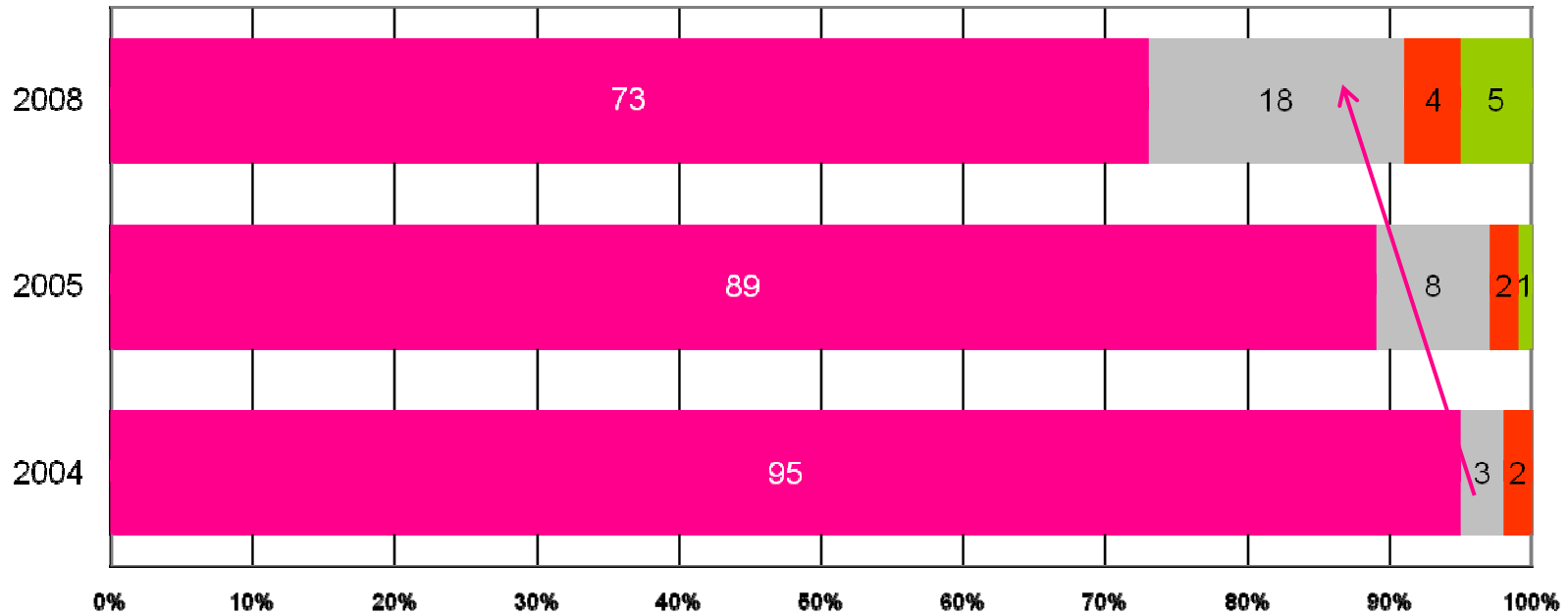


The younger visitors use Internet more frequently in order to book a trip and the proportion of travel agencies has dropped.

Number of Previous Visits to Tallinn

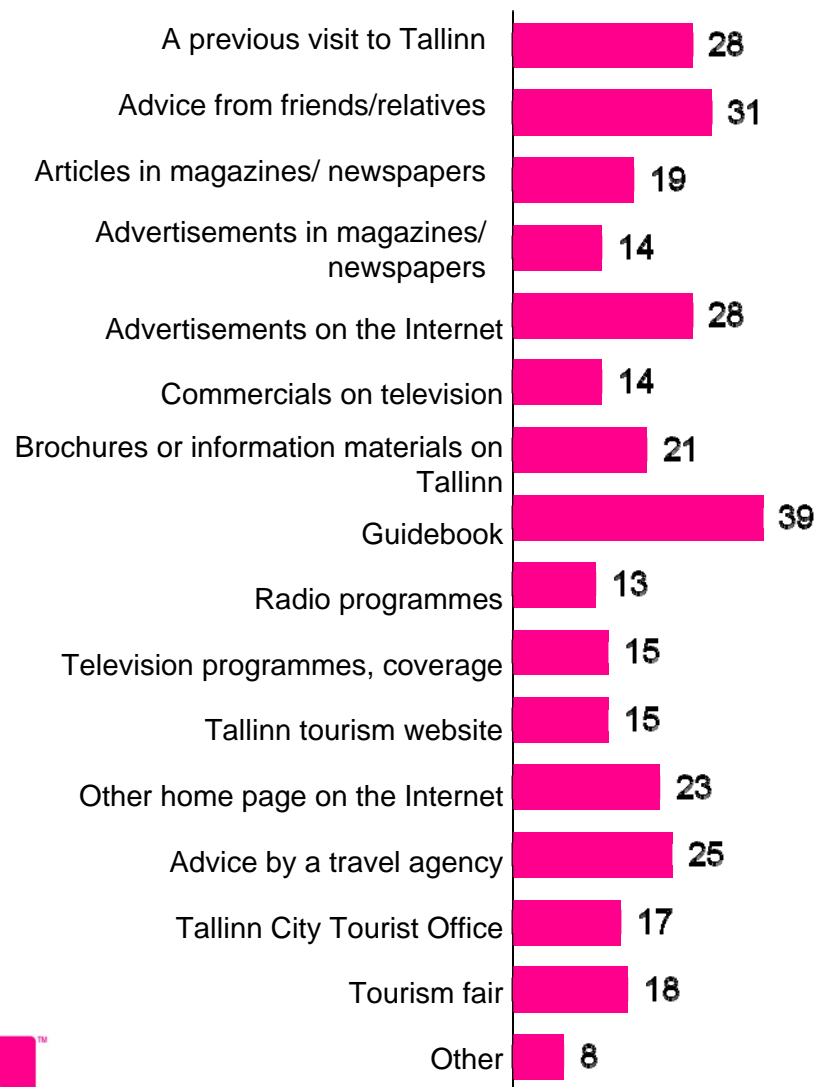
% of all cruise voyagers arrived

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



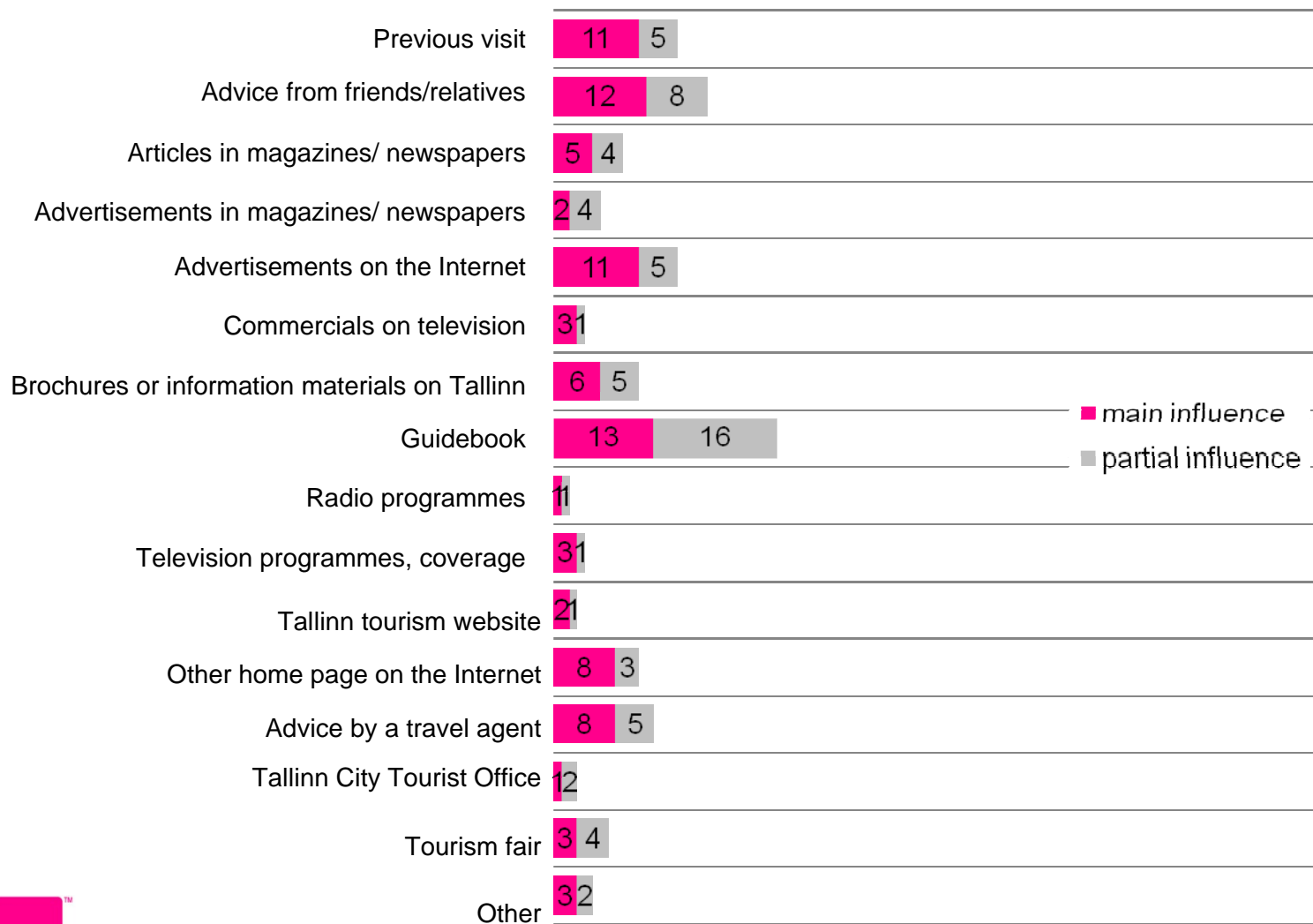
Information Sources about Tallinn Before and During the Trip

% of all cruise voyagers arrived



The Factors that Influence Visiting Tallinn

% of all cruise voyagers arrived

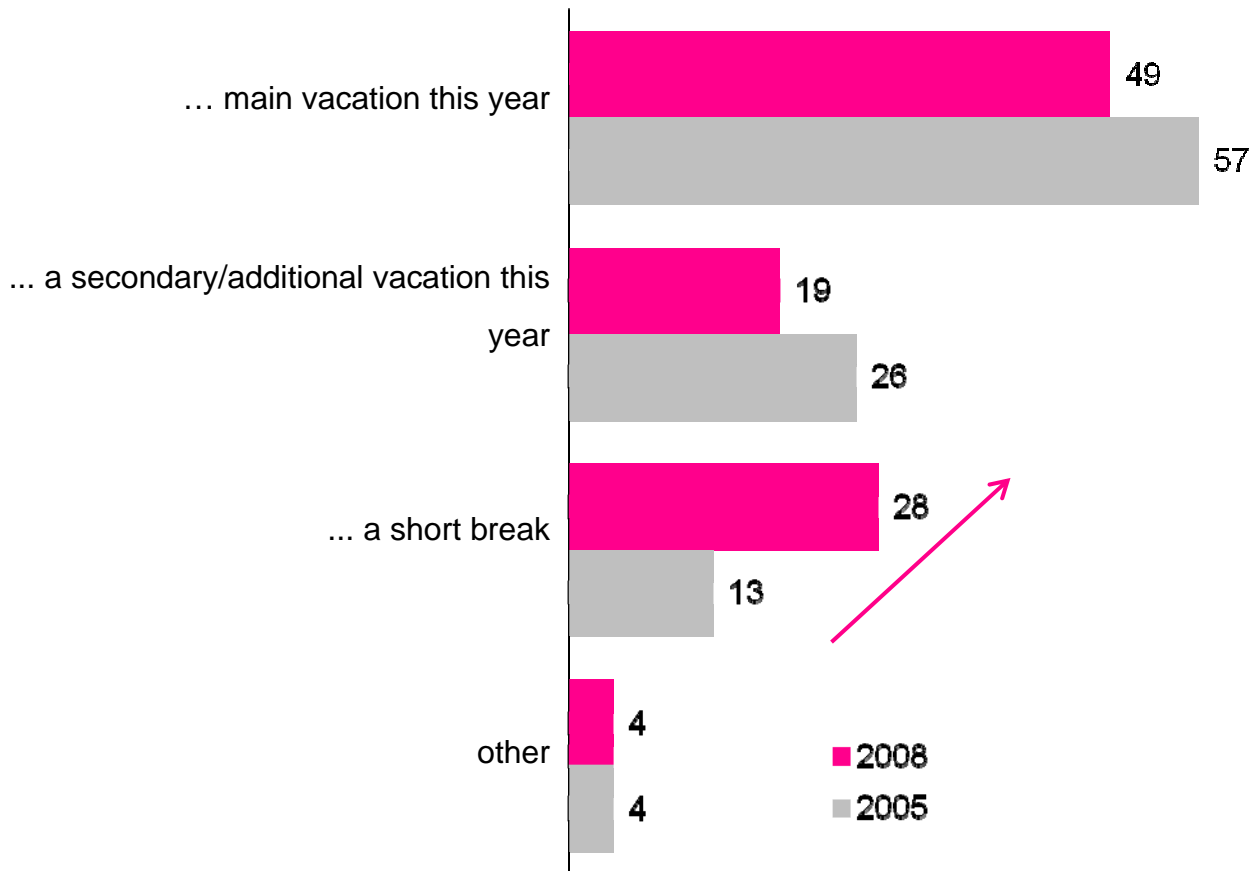


Tallinn



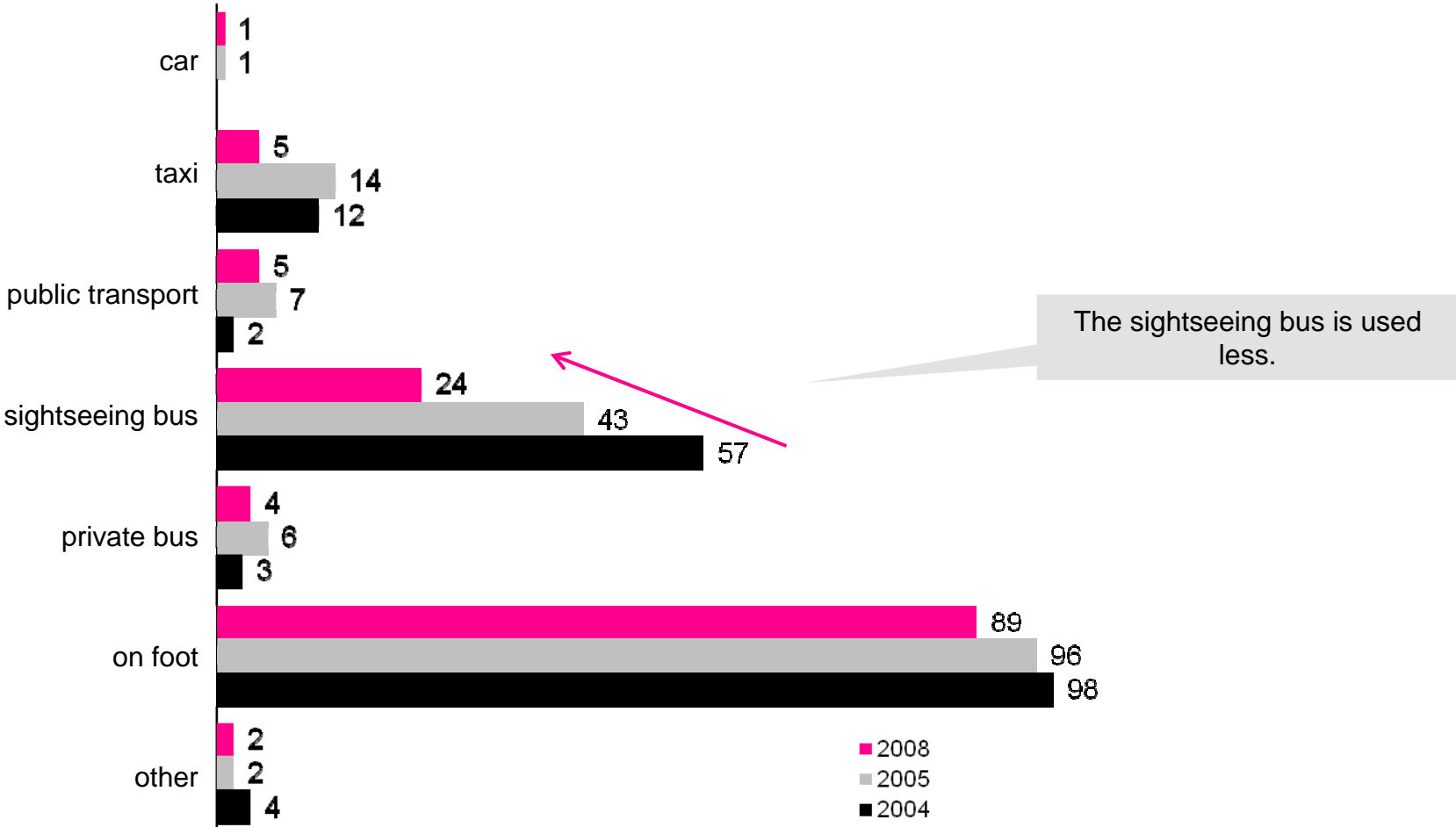
Holiday Trip

% of all cruise voyagers arrived



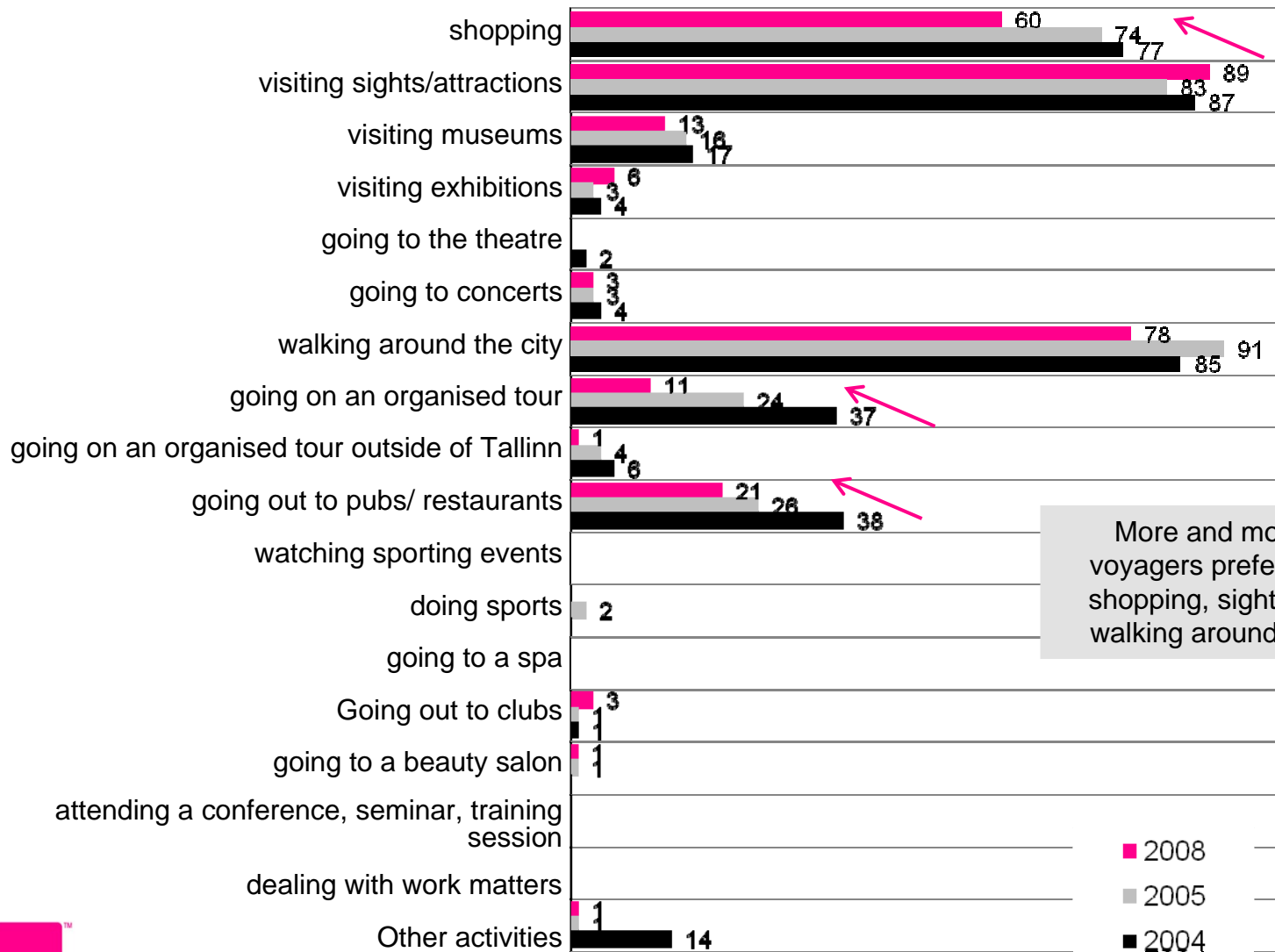
Transportation Used in Tallinn

% of all cruise voyagers arrived



Activities Tallinn

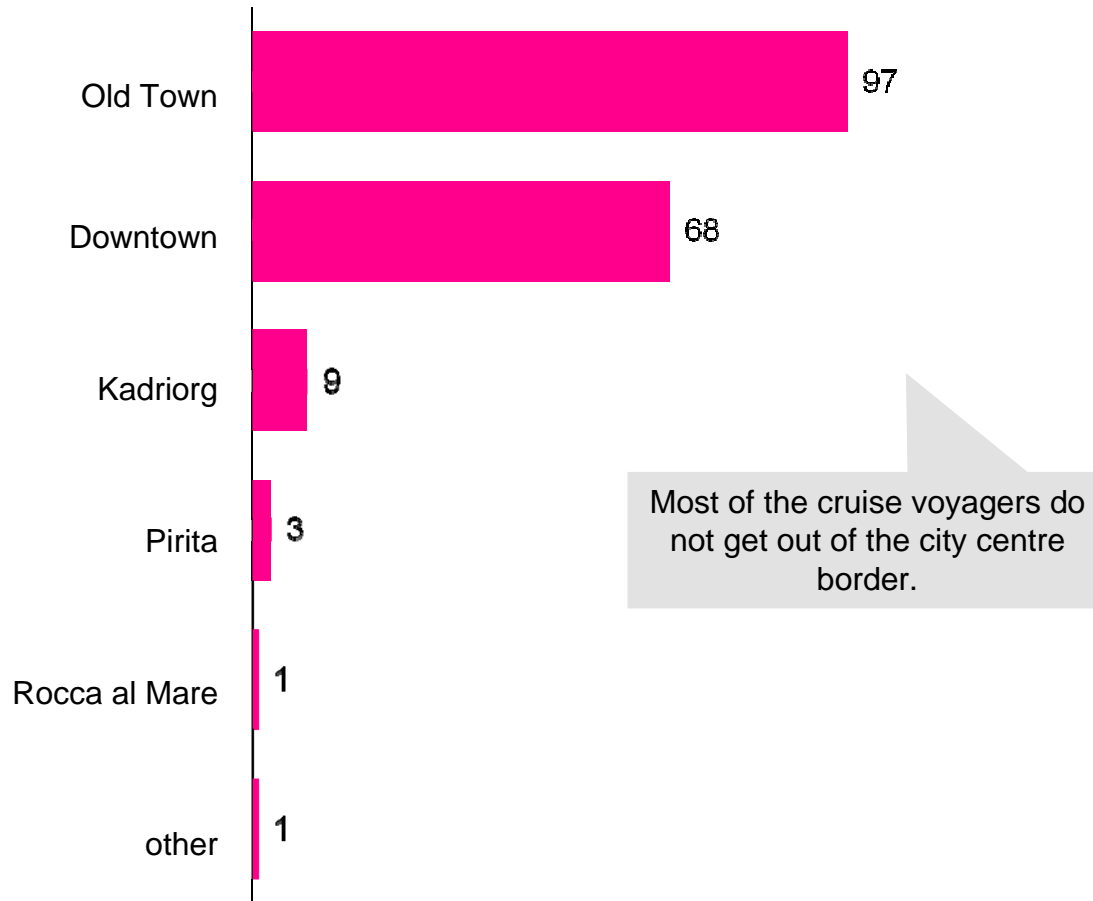
% of all cruise voyagers arrived



More and more cruise voyagers prefer just going shopping, sightseeing and walking around in the city.

Areas of Tallinn Visited

% of all cruise voyagers arrived

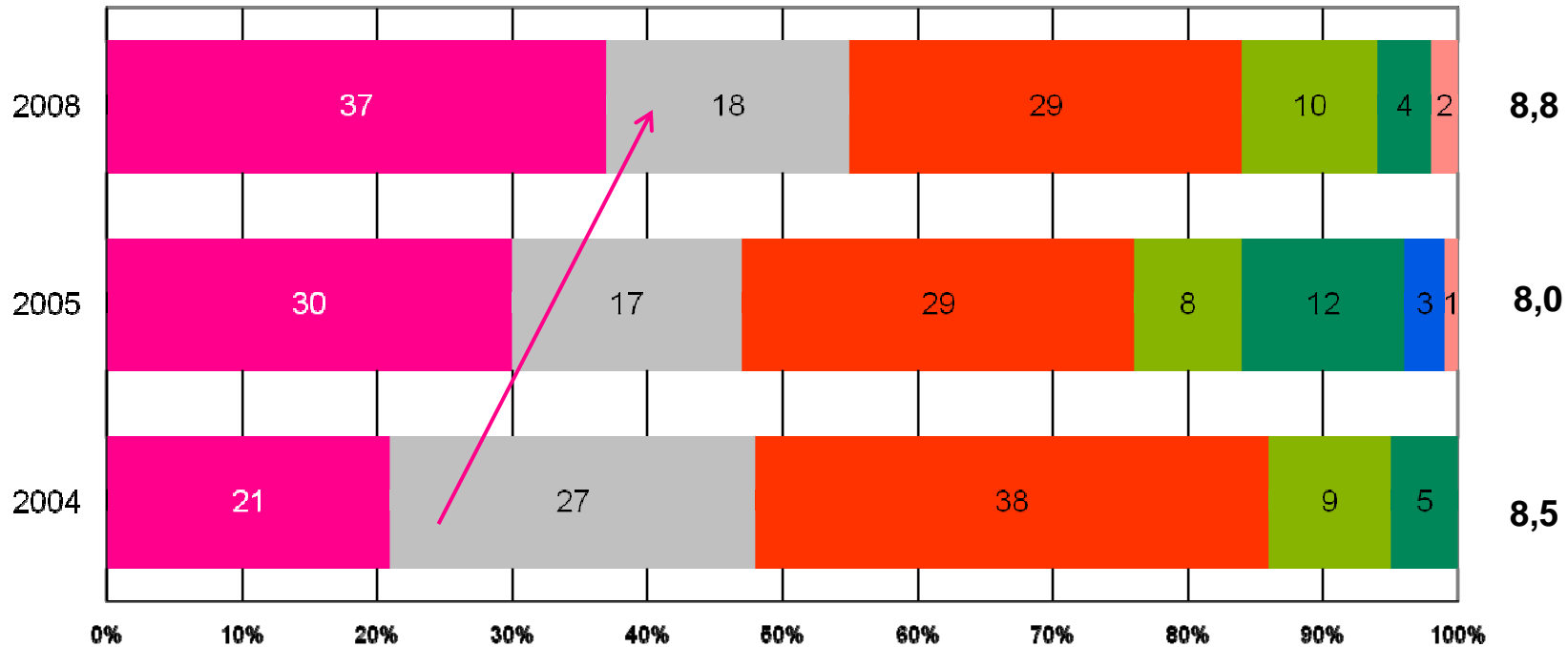


Evaluation to Tallinn

% of all cruise voyagers arrived

**Average
evaluation**

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

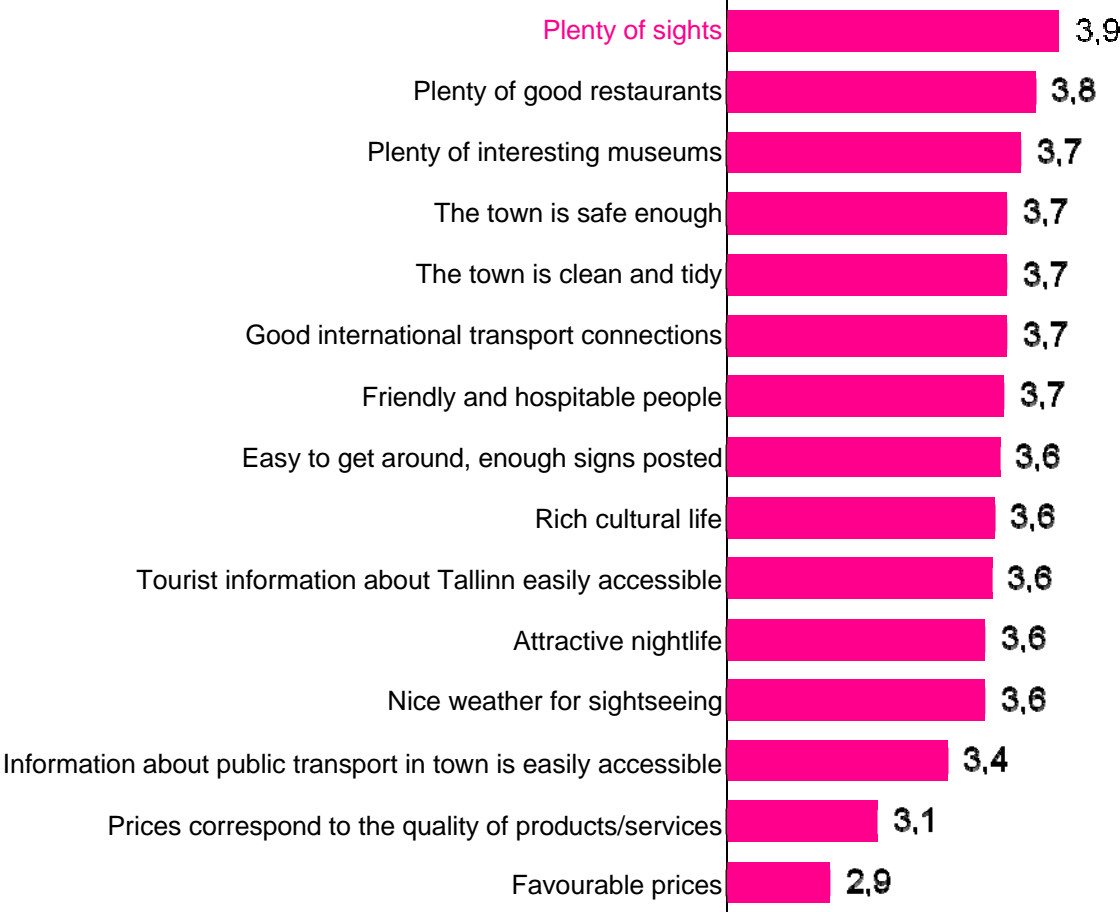


The cruise voyagers are more satisfied with Tallinn.

The Image of Tallinn

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

2008*

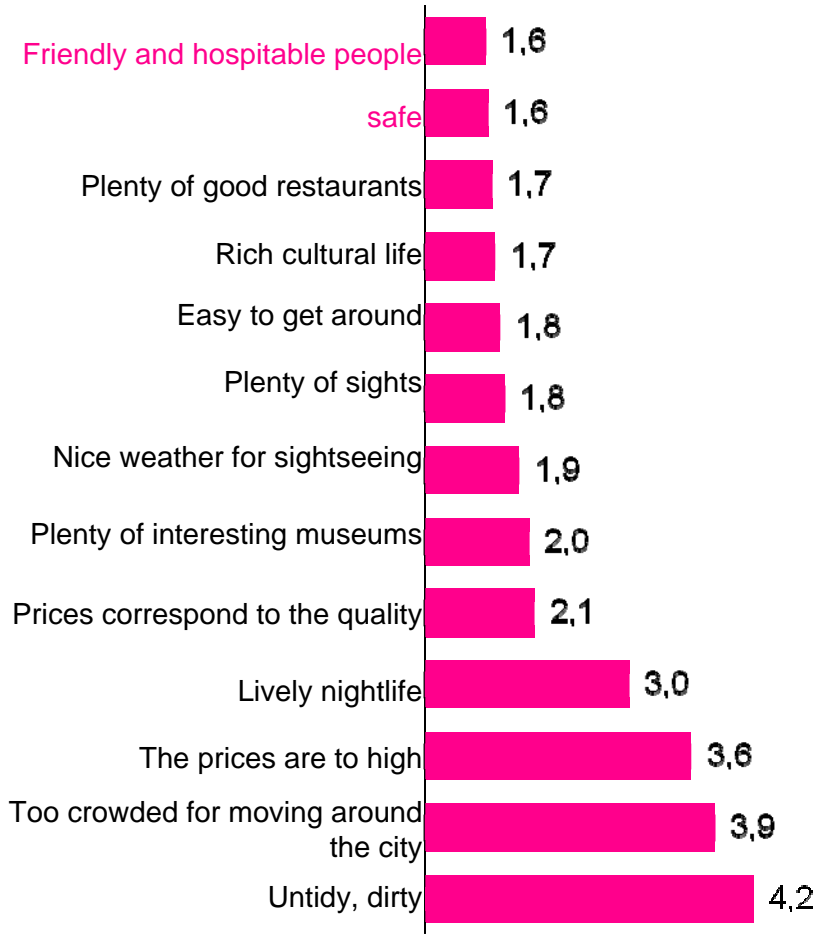


*In 2008 the division of scale and the names of categories have been changed compared to the previous surveys. The results for 2004 and 2005 are presented in the next slides.

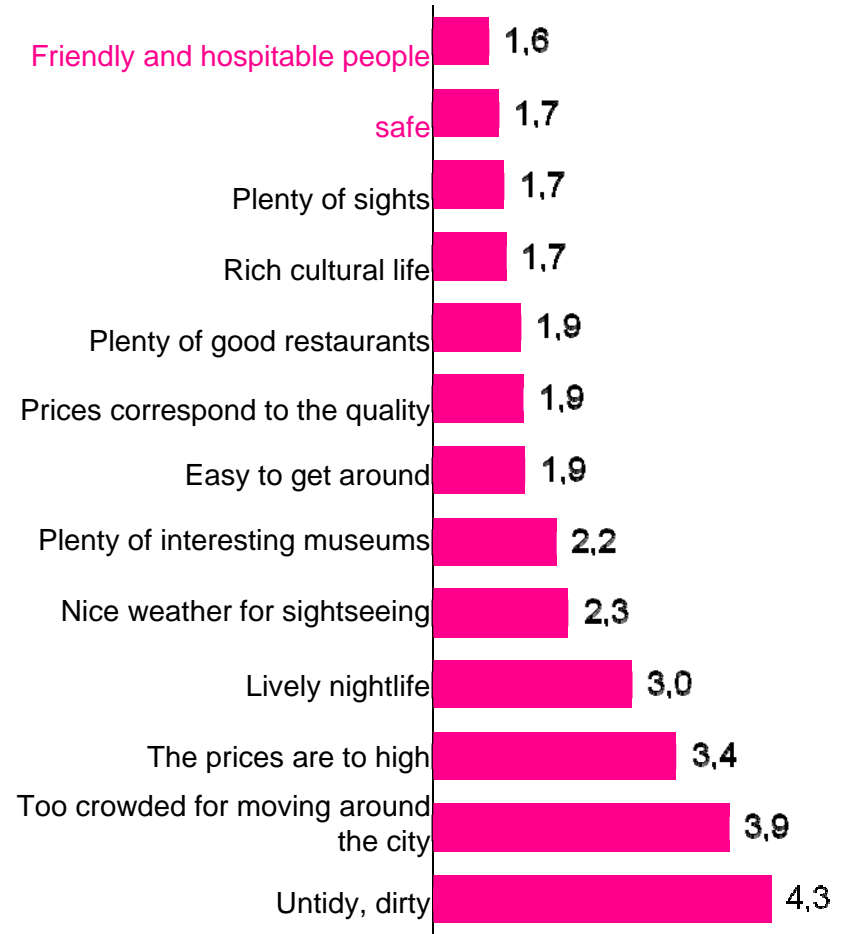
The Image of Tallinn

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

2005

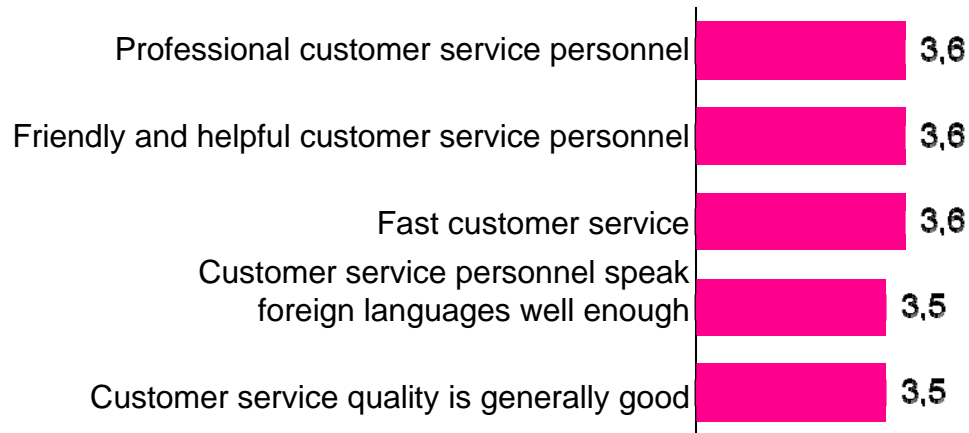


2004



Tallinn customer service culture*

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



The satisfaction with Tallinn service culture is slightly higher among cruise voyagers compared to other visitors.

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

Positive and negative 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.

+

Old Town

Positive experience with Estonians

Town Hall Square and its
surroundings
Nevski cathedral

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.

-

Unfriendly customer service personnel

Cold or bad weather

Dirty or slippery streets

Not enough toilets in the streets

Expensive public transportation

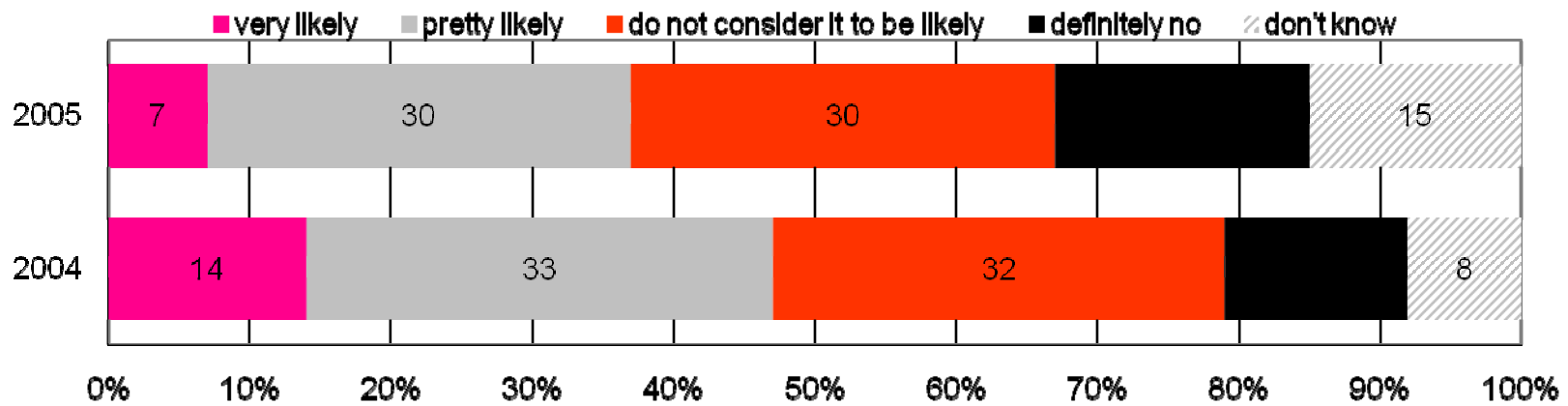
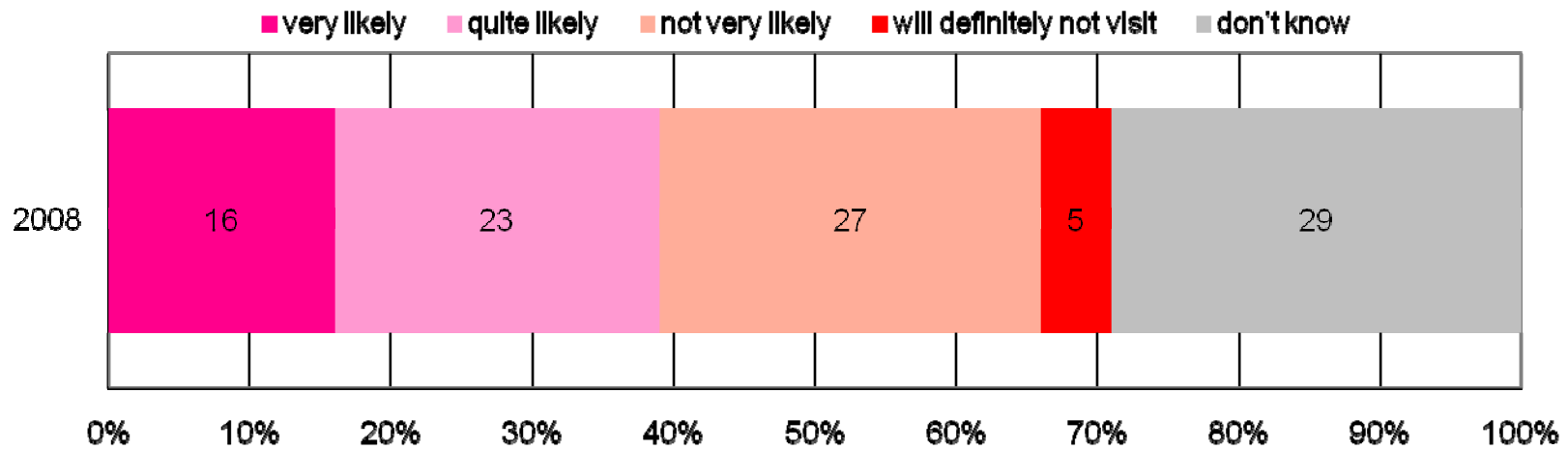
Dirty streets

Bad traffic, not enough traffic lights

Likelihood of visiting Tallinn again

% of all cruise voyagers arrived

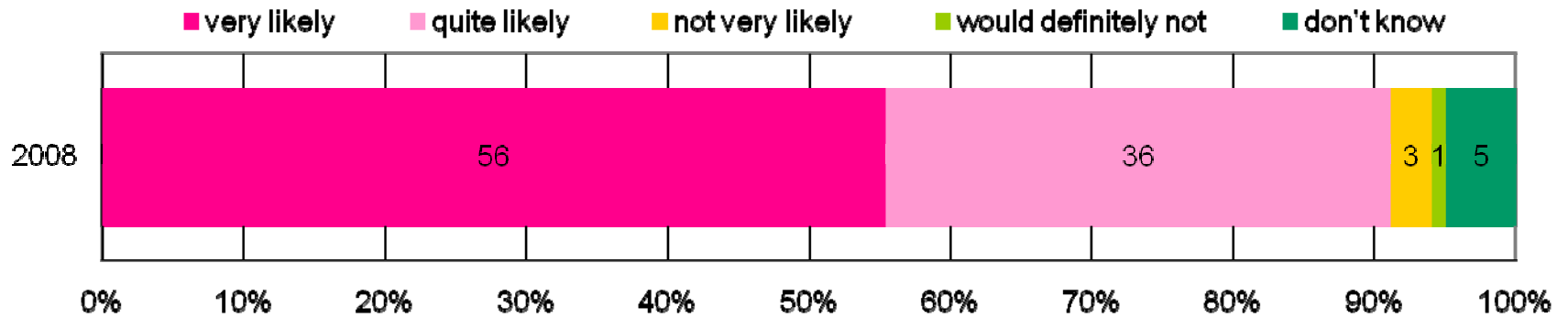
How likely are you to visit Tallinn again during the next 5 years? *



Recommendation communication

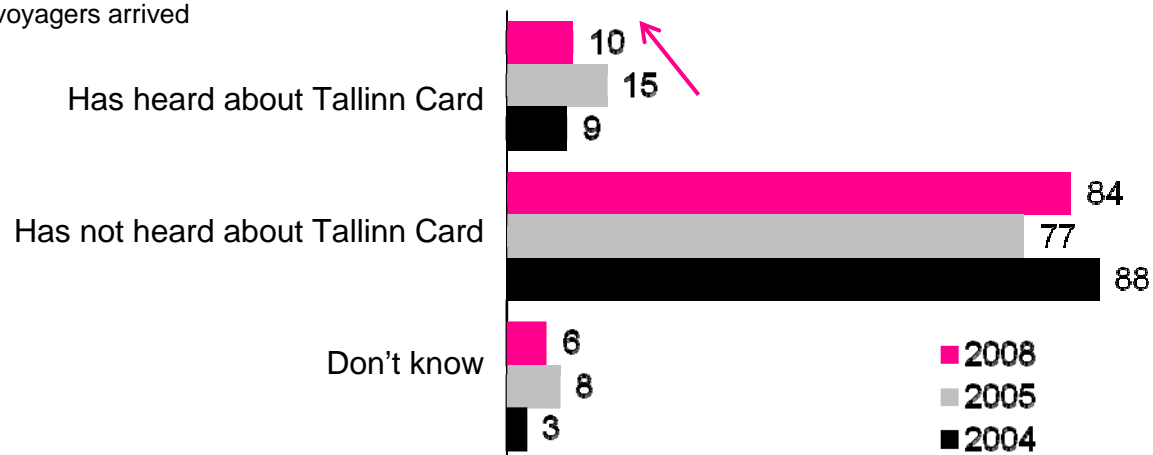
% of all cruise voyagers arrived

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

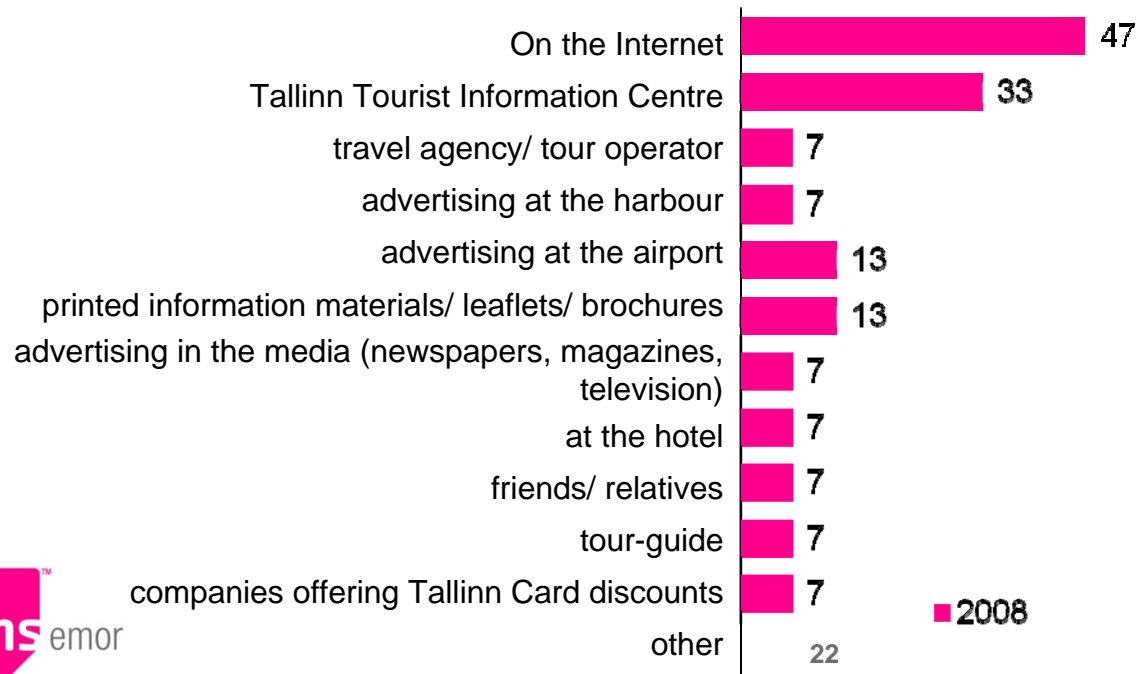


Information about Tallinn Card

% of all cruise voyagers arrived

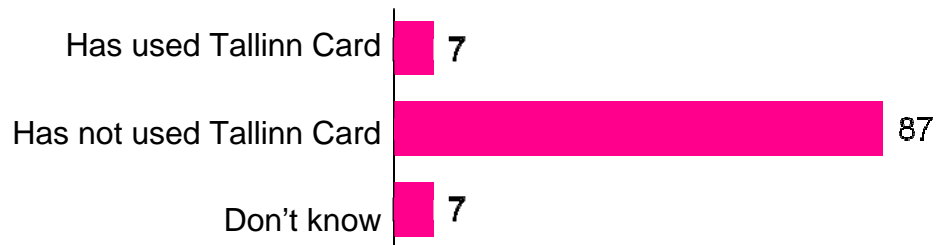


% of all the visitors who have heard about Tallinn Card



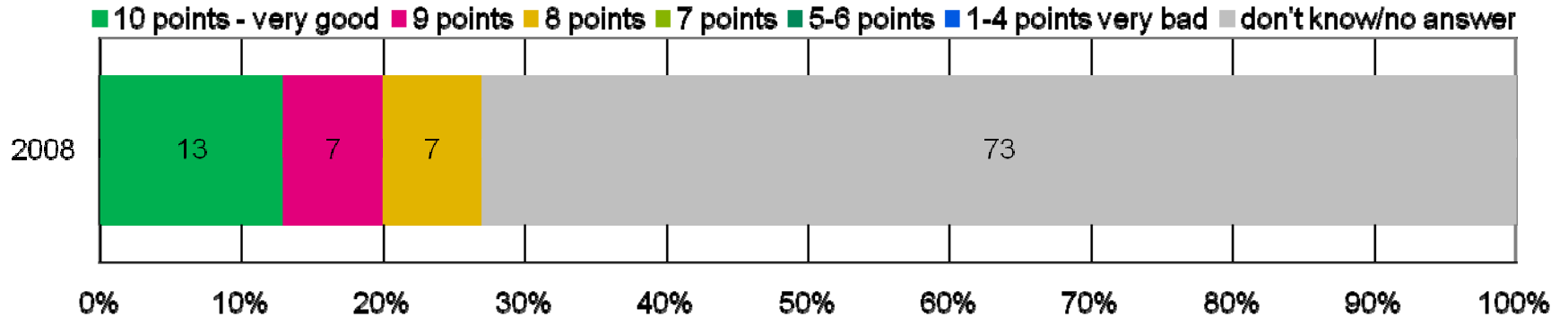
The Usage of Tallinn Card

% of all the visitors who have heard about Tallinn Card (10%)



Opinion about Tallinn Card

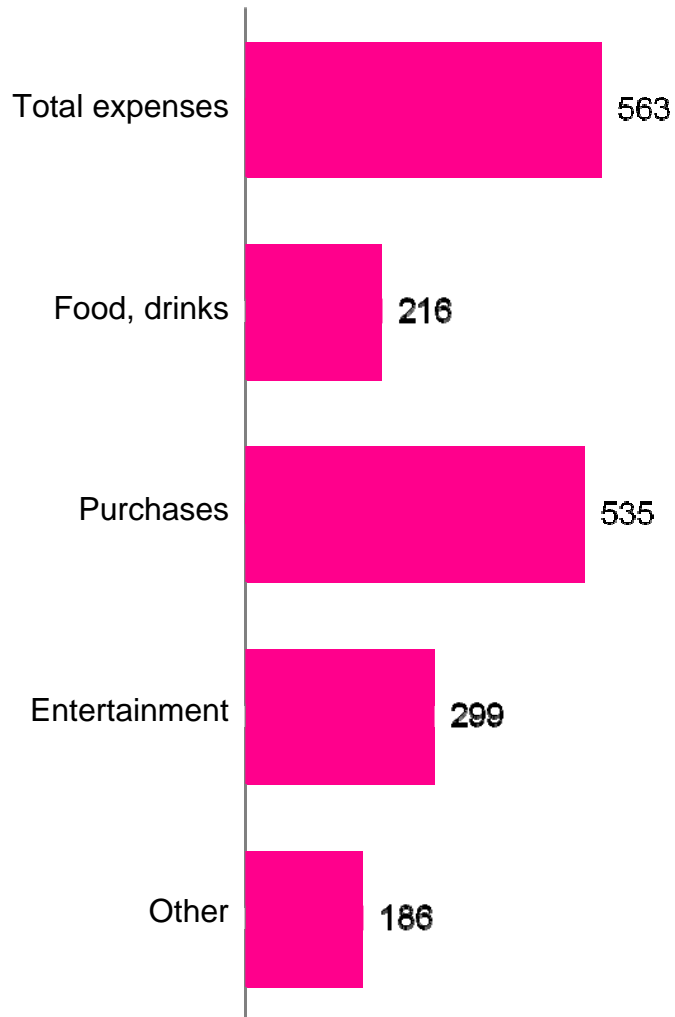
% of all the visitors who have heard about Tallinn Card (10%)



Maximum points are given more among cruise voyagers than in average

Average expenditures per person per day

Average expenditures per person



The expenditures among cruise voyagers are considerably lower compared to “regular visitors”.

Summary



Cruise voyagers

15%* of Tallinn foreign visitors

- In 2008 approximately 375 000 foreign visitors arrived in Tallinn using cruise trips (compared to 272 000 in 2005).
- About half of the cruise voyagers are older than 55 years old, however the proportion of these visitors has dropped compared to the previous periods (in 2005 two thirds of visitors were older than 55 years). This has increased the proportion of employees and decreased the proportion of pensioners.
- More than half (62%) of the visitors use travel agency to book a trip, the number of these people is decreasing, the younger visitors have brought in more active usage of Internet in order to book a trip.
- The proportion of visitors who have visited Tallinn before has increased (eg. 1-2 times 8% in 2005 vs 18% in 2008).
- What concerns information sources about Tallinn then guidebook, advertisements on the Internet as well as previous visit or advice from friends and relatives dominate. The trip to Tallinn is mostly influenced by the guidebook.
- More cruise voyagers prefer to go shopping, sightseeing or walking around in the city centre. Going on an excursion or visiting a museum and going out to restaurants/cafes has decreased. Most of the cruise voyagers do not cross the city centre border (old town, city centre).
- At the same time the cruise voyagers are more satisfied with Tallinn- the average evaluation has increased till 8,8 points (on the 10 point scale). The visitors are more satisfied with the sights and less with the price level. The satisfaction with Tallinn service culture among the cruise voyagers is slightly higher than among the regular visitors.
- The proportion of visitors who are ready to visit Tallinn again has not changed (37% in 2005 vs 39% in 2008) at the same time most of them are eager to recommend Tallinn as a holiday destination to their acquaintances and friends.
 - The amount of visitors who know about Tallinn Card has dropped (10% in 2008 vs 15% in 2005) and not many have used it (7 % of those who have heard about it). However, there are more visitors among the cruise voyagers who have given the maximum evaluation to the card's price and quality proportion than in average.