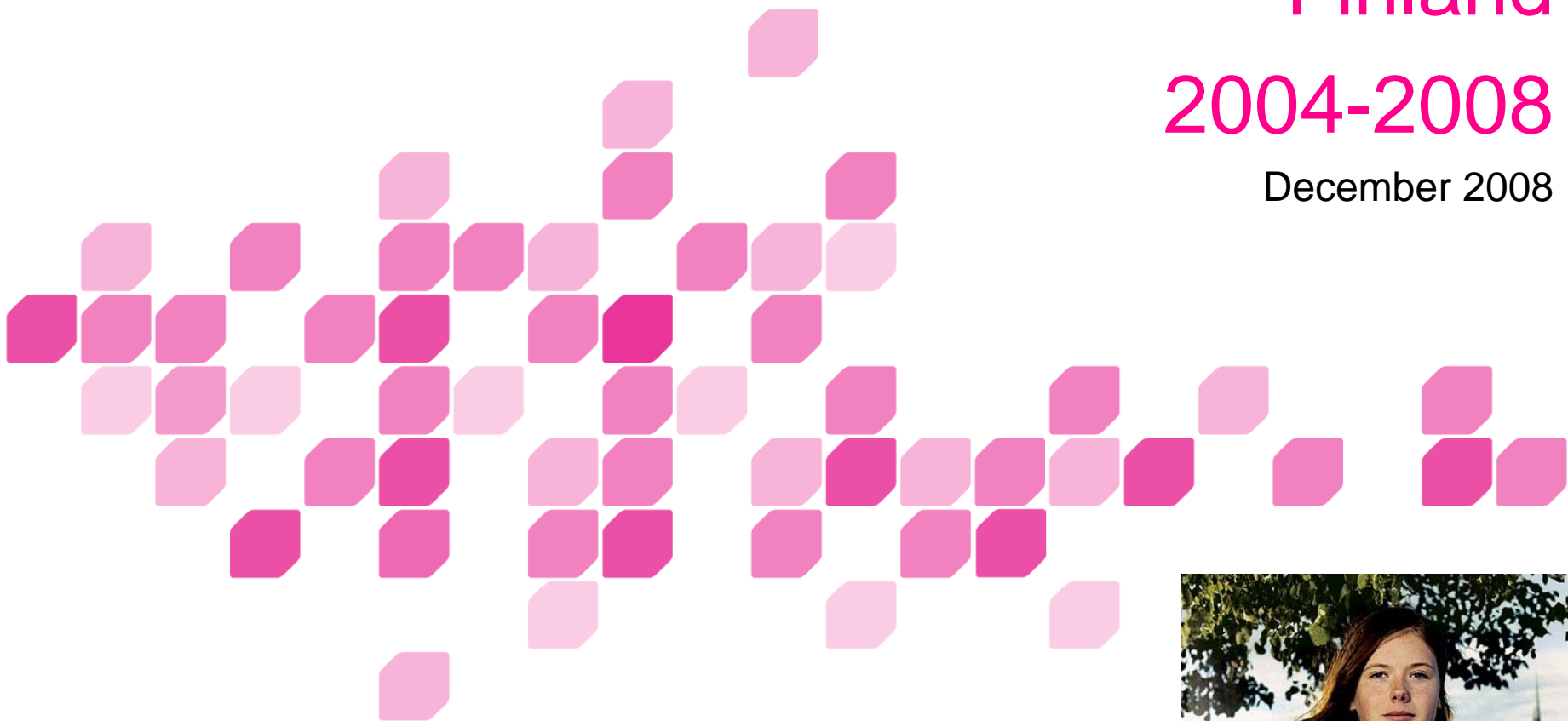


# Finland 2004-2008

December 2008

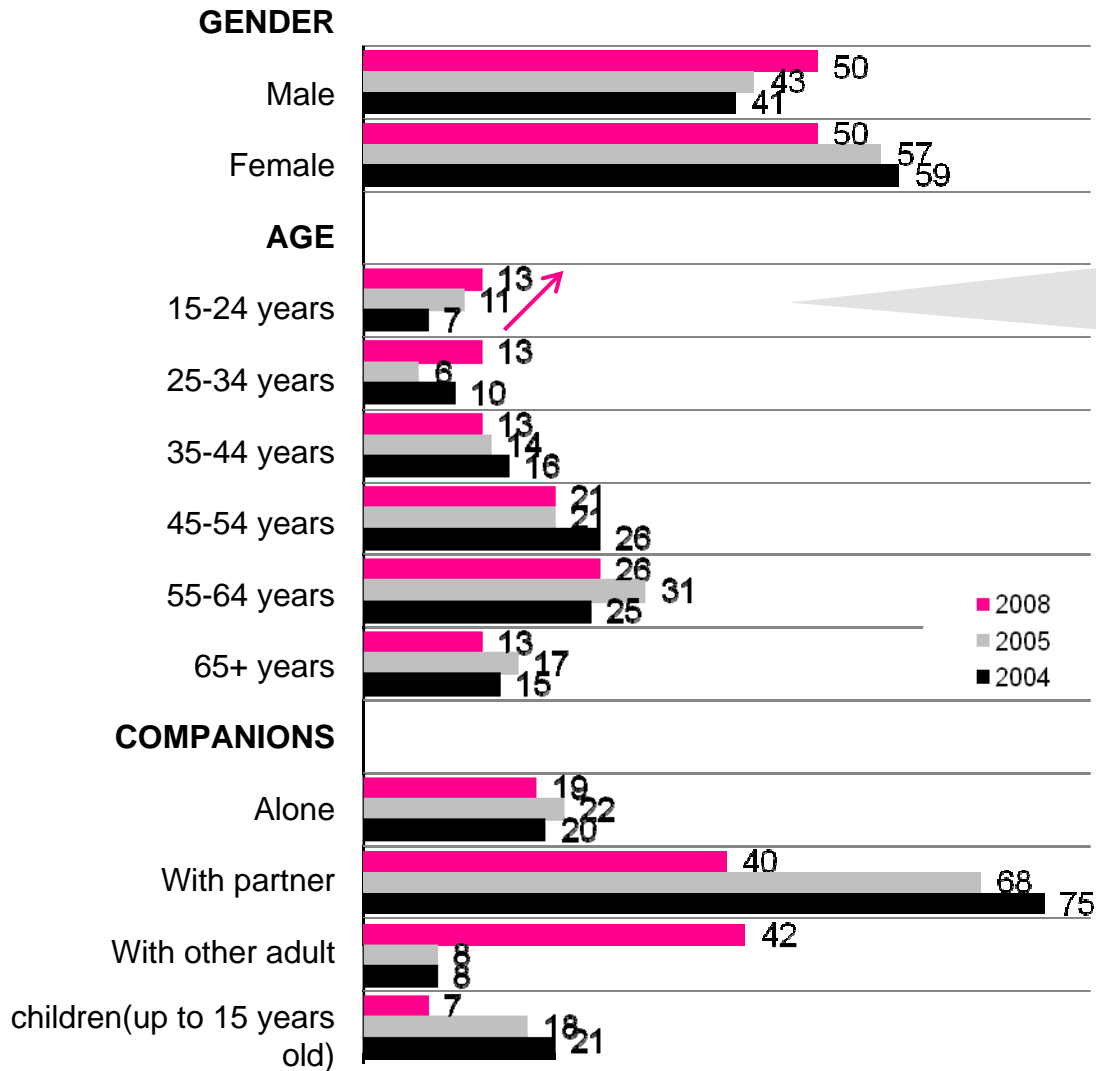


# Sample

- **Sample size:**
  - 2008 – 401 visitors
  - 2005 – 352 visitors
  - 2004 – 349 visitors
- In 2008 2 % of the visitors who arrived from Finland were questioned in the airport and 98% in the harbour (the same proportions in 2005).
- Although the Finns make still up over half of the Tallinn foreign visitors, the proportion **has decreased compared to the previous surveys** ( 52% in 2008 and 60% in 2005).
- 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

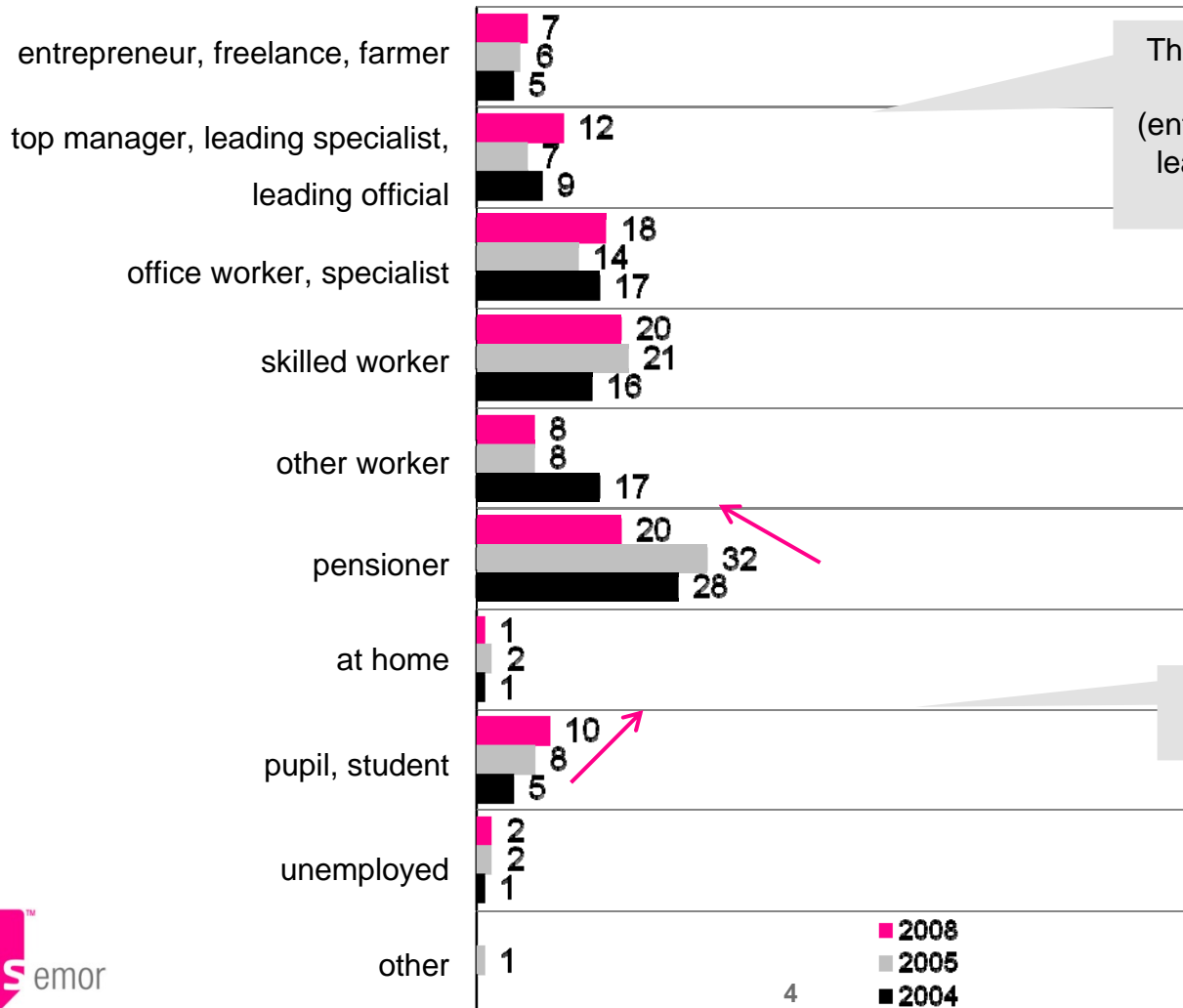


Compared to the previous years a new trend can be sighted- the proportion of younger people has increased and the proportion of older people has decreased.

# Respondent Profile (2)

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

## STATUS



The proportion of white collar workers has increased (entrepreneurs, top managers, leading specialist as well as office workers).

There are more students as well every year.

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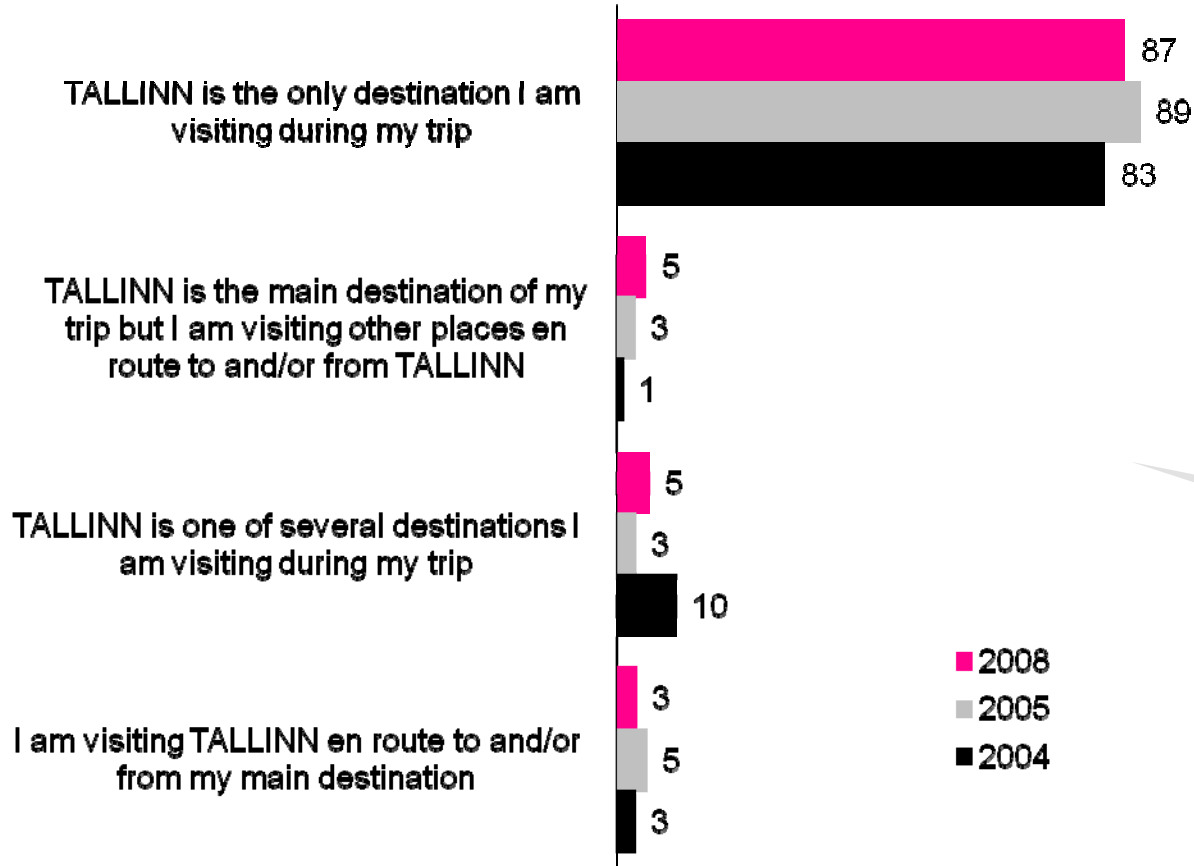
## The purpose of the trip and the route

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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

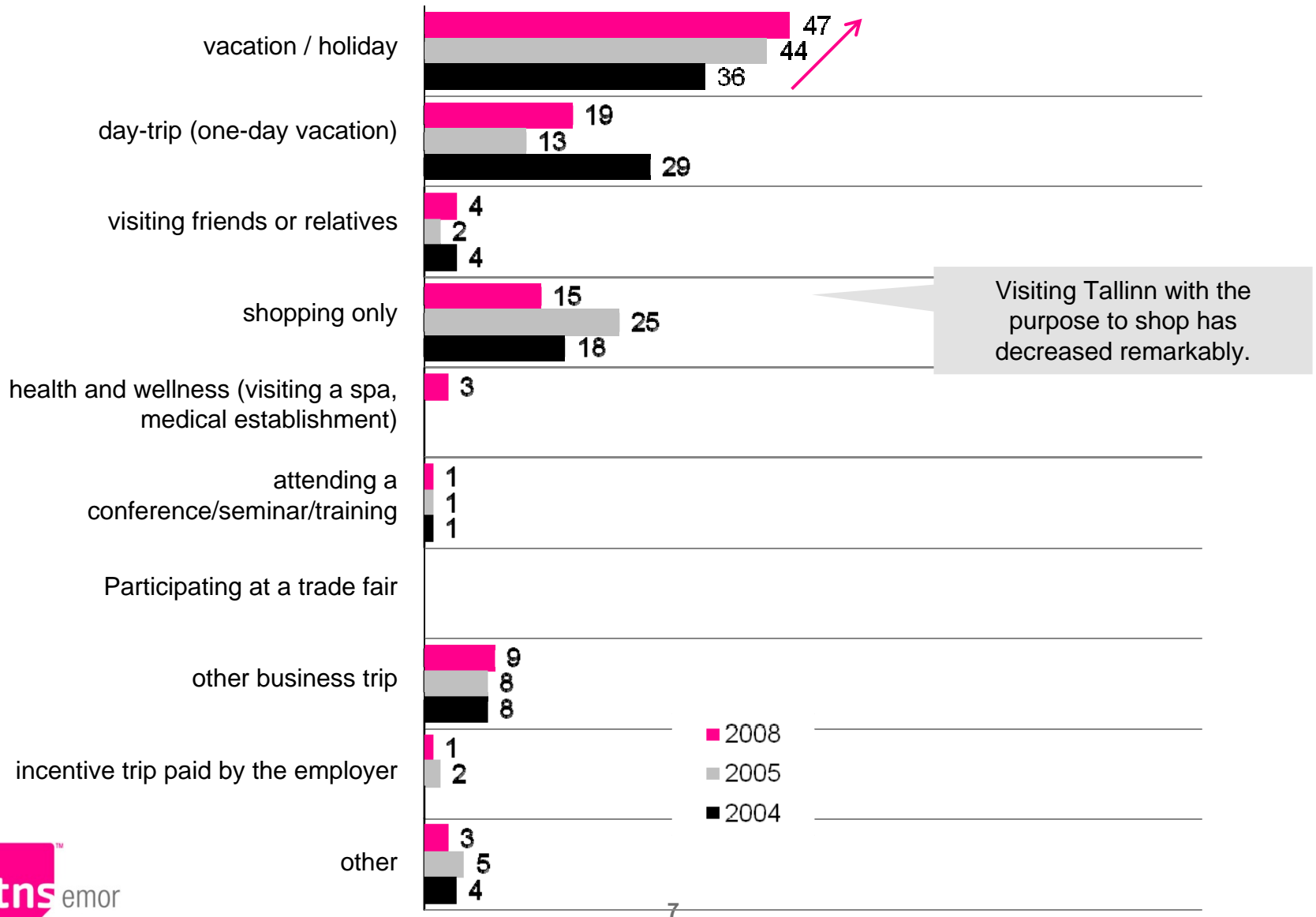


Compared to other countries Tallinn is more frequently the only destination during the trip.

The rise in the proportion of younger people has caused visiting other countries during the trip.

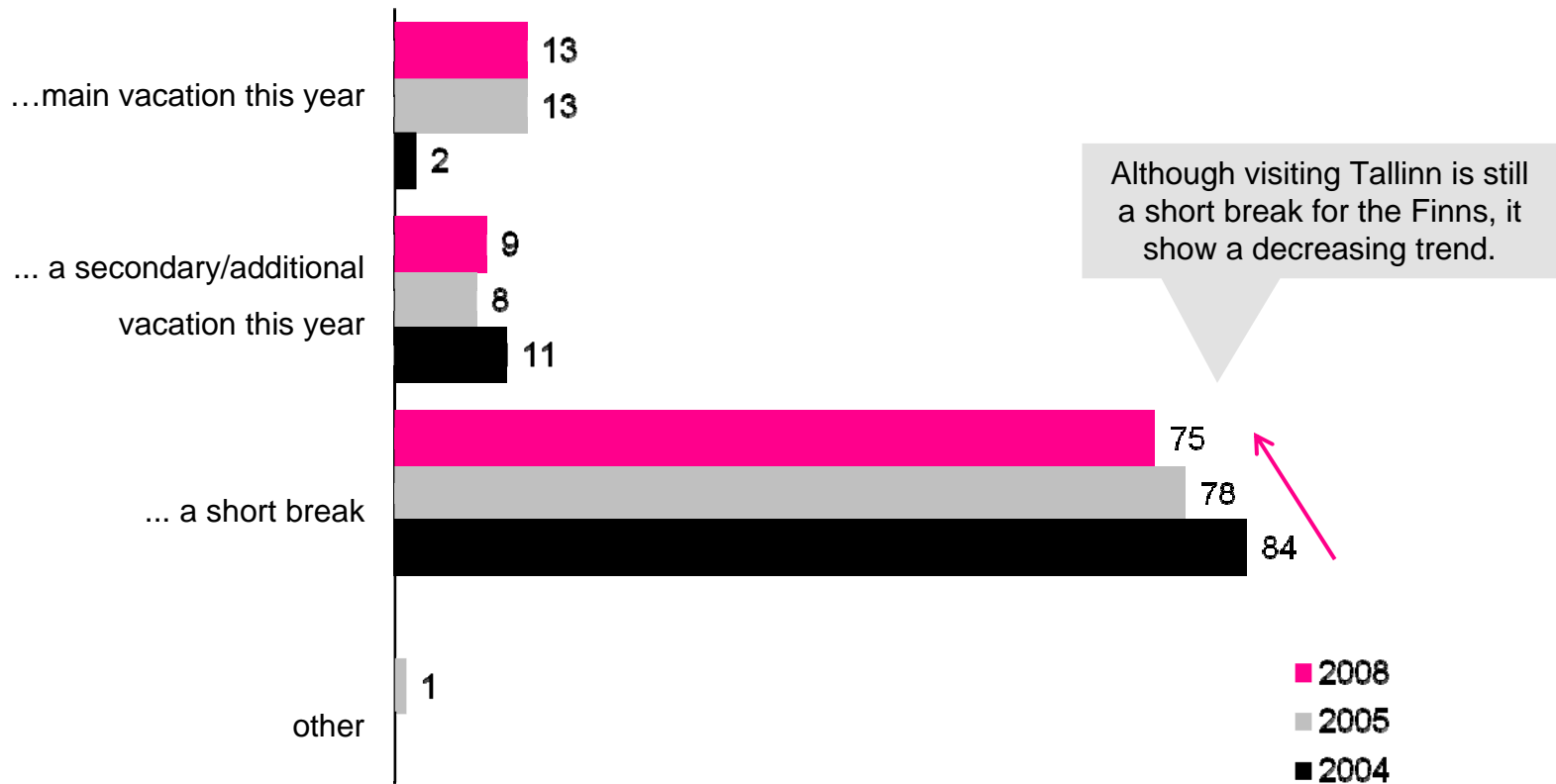
# The purpose of the trip

% of all the visitors who have arrived from Finland



# The meaning of the holiday

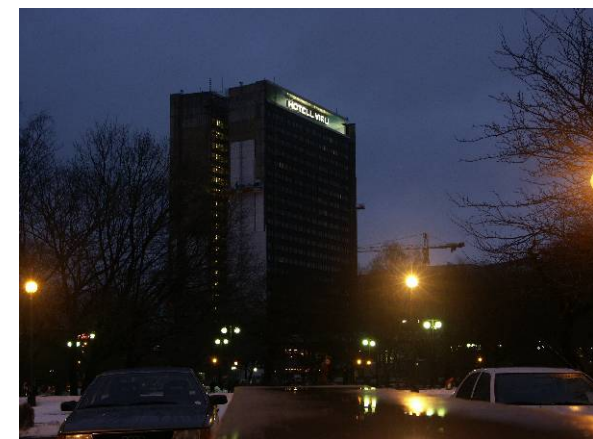
% of all the visitors who have arrived from Finland, who are on a holiday or who visit friends and relatives with the holiday purpose ( 51 % in 2008)



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# Staying overnight and accommodation

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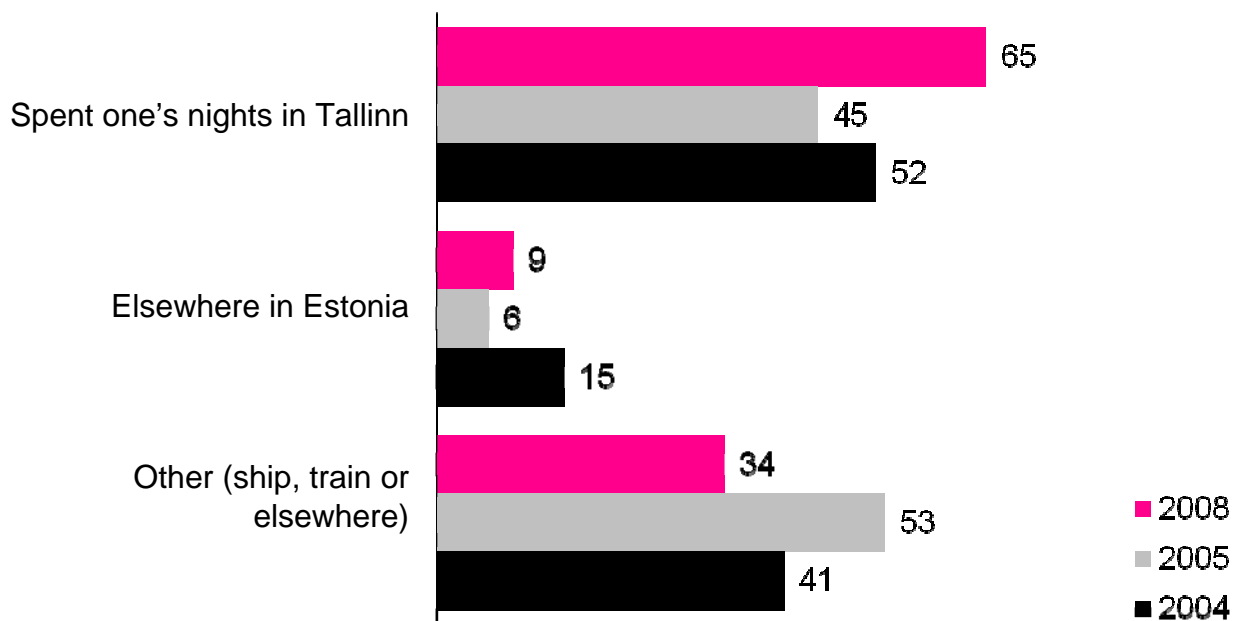


# Nights spent away from home during the trip

% of all the visitors who have arrived from Finland



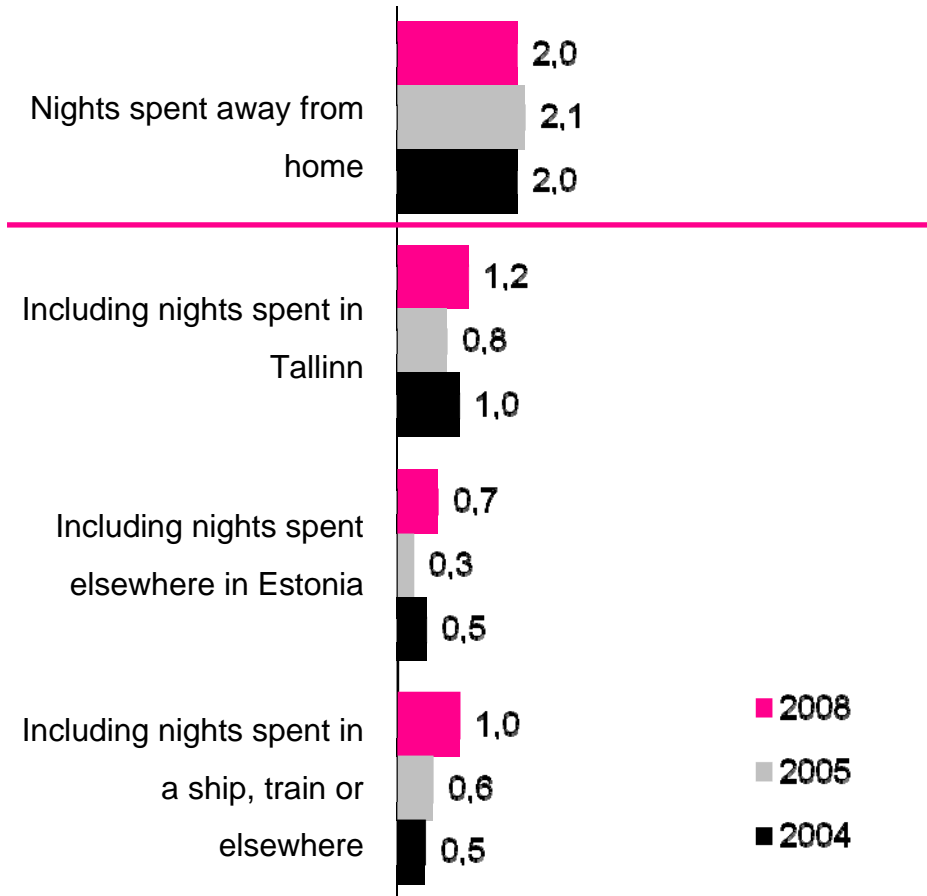
%Of all the visitors, who have spent nights away from home



# Spending nights away from home

the number of average nights spent away from home

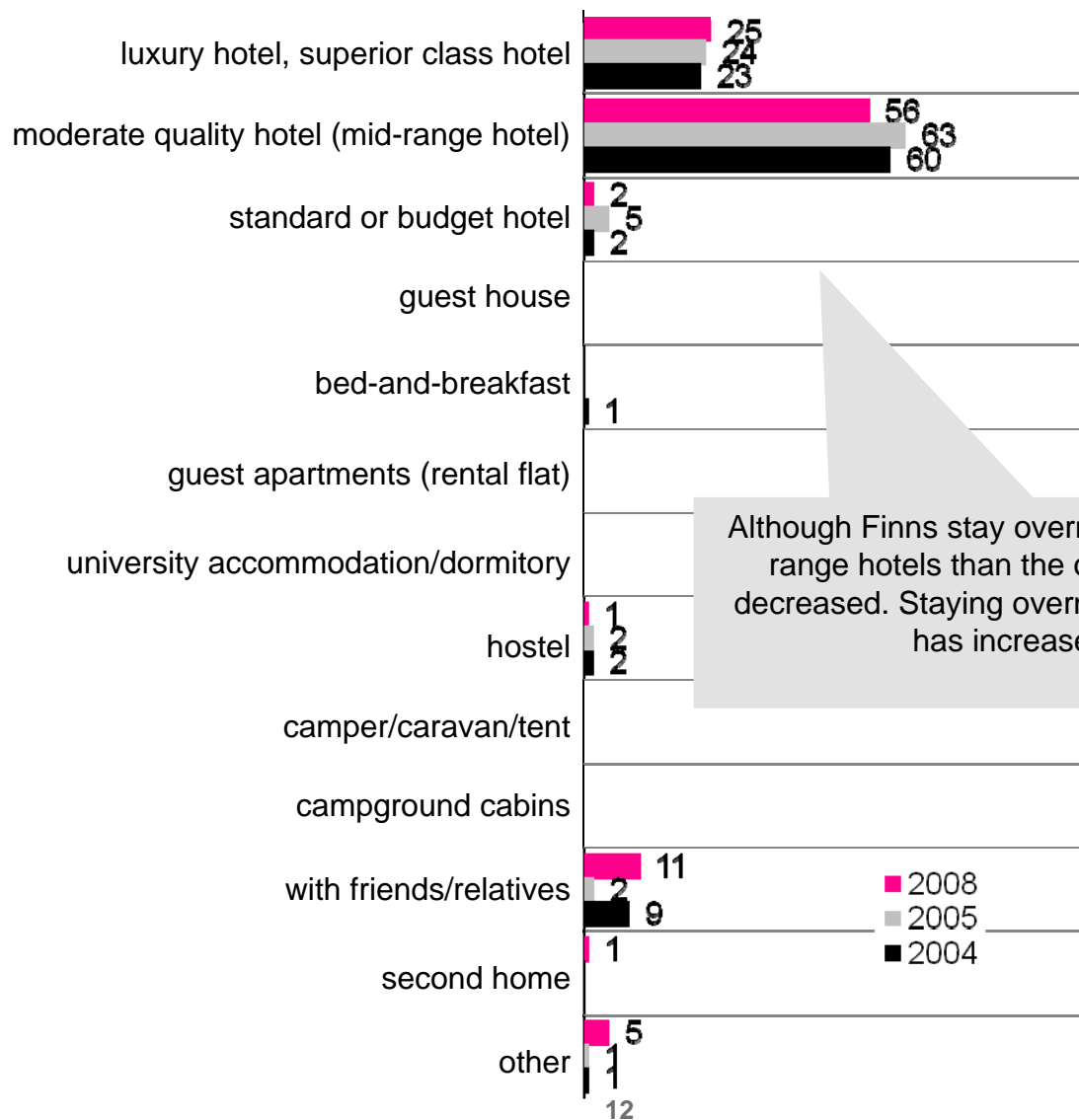
(of all the visitors who have arrived from Finland, who have spent nights away from home)



Compared to other countries the Finns spend less nights away from home (4,5- 8 nights in average)

# Staying overnight in Tallinn

% of all the visitors who have arrived from Finland, who have spent at least one night in Tallinn ( 45% in 2008)



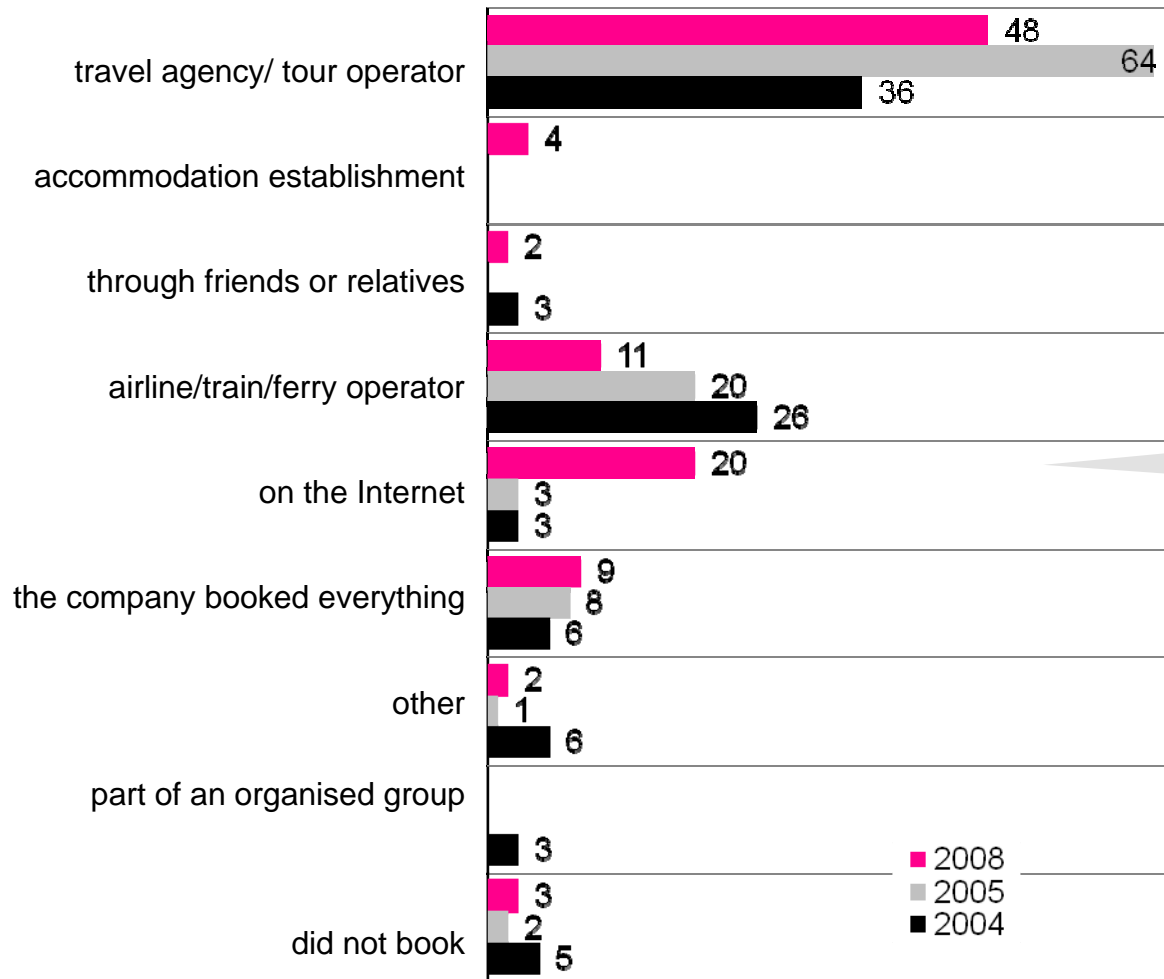
Although Finns stay overnight more frequently in mid-range hotels than the others, the proportion has decreased. Staying overnight at friends and relatives has increased significantly.

# Before arriving to Tallinn



# Booking accommodation

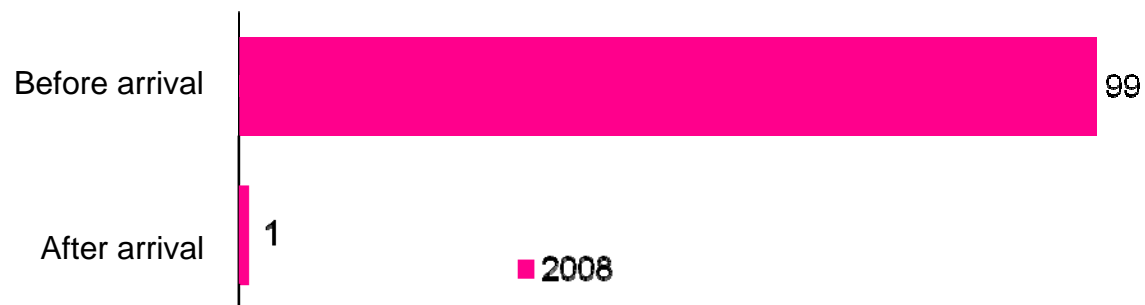
% of all the visitors who have arrived from Finland, who have spent at least one night in Tallinn (45 % in 2008)



The Finns have started using the Internet options more frequently.

# Booking accommodation

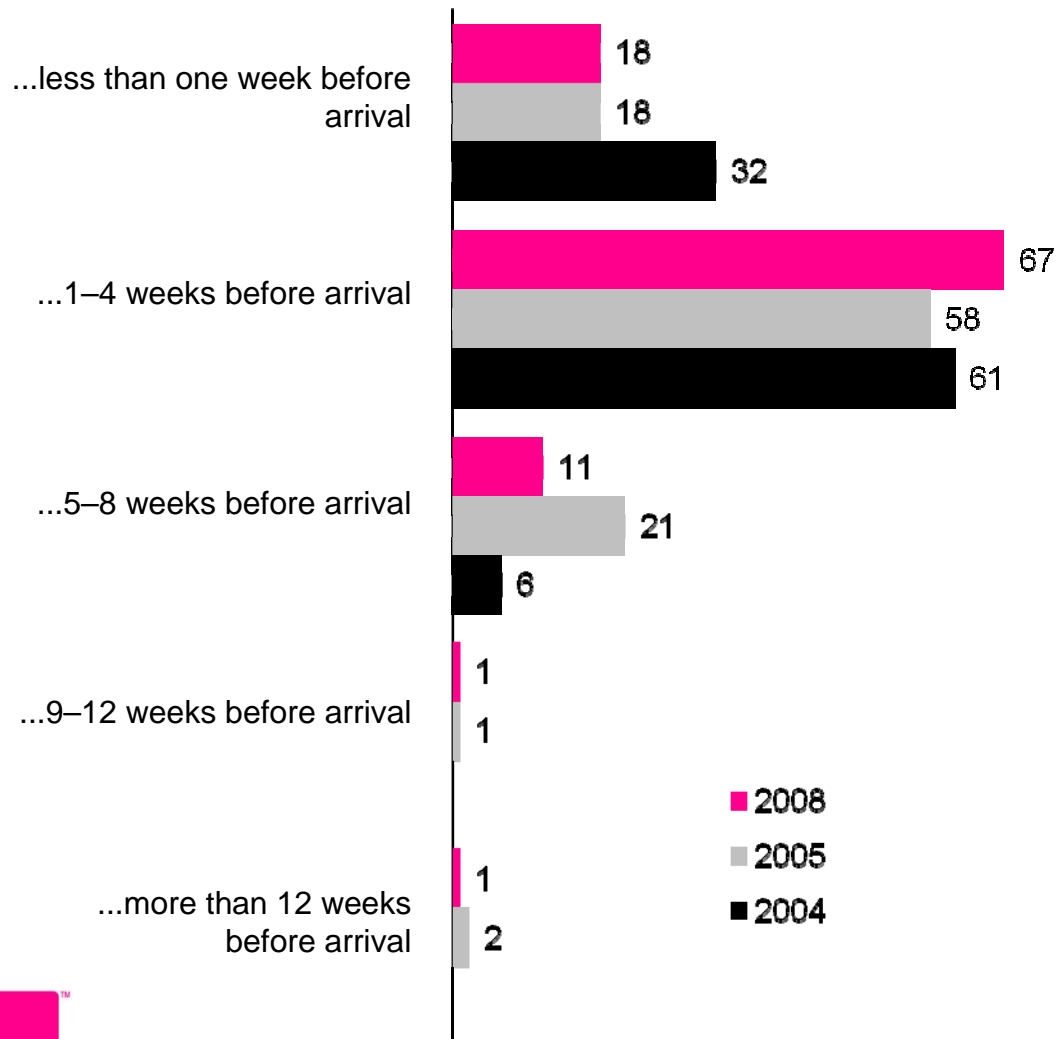
% of all the visitors who have arrived from Finland, who have spent at least one night in Tallinn staying in an accommodation establishment and who have booked one's accommodation ( 45% in 2008)



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

# The time of booking one's accommodation

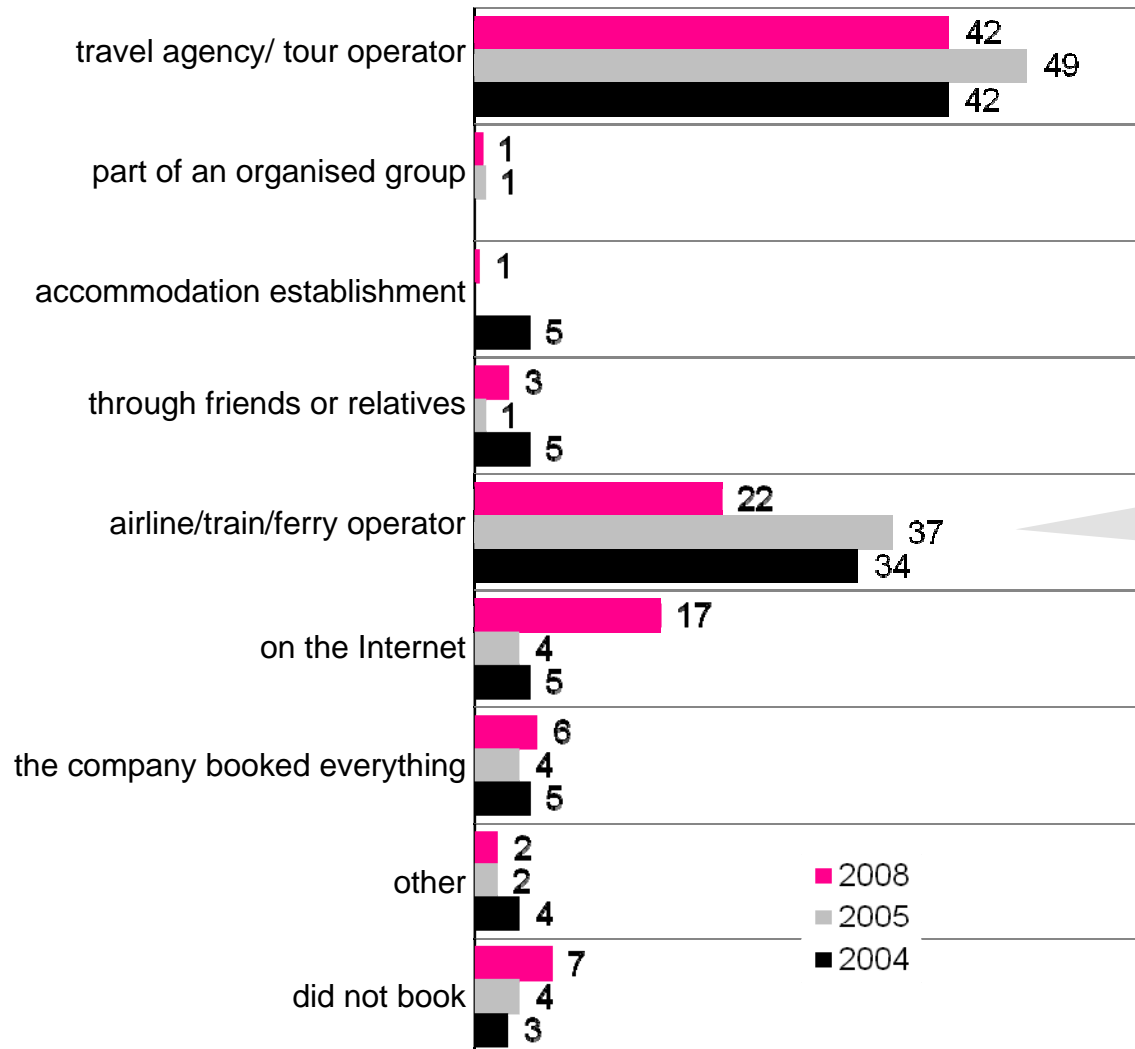
% of all the visitors who have arrived from Finland, who have spent at least one night in Tallinn and who have booked one's accommodation before arrival



In most of the cases the accommodation is booked one month in advance.

# Booking Transportation

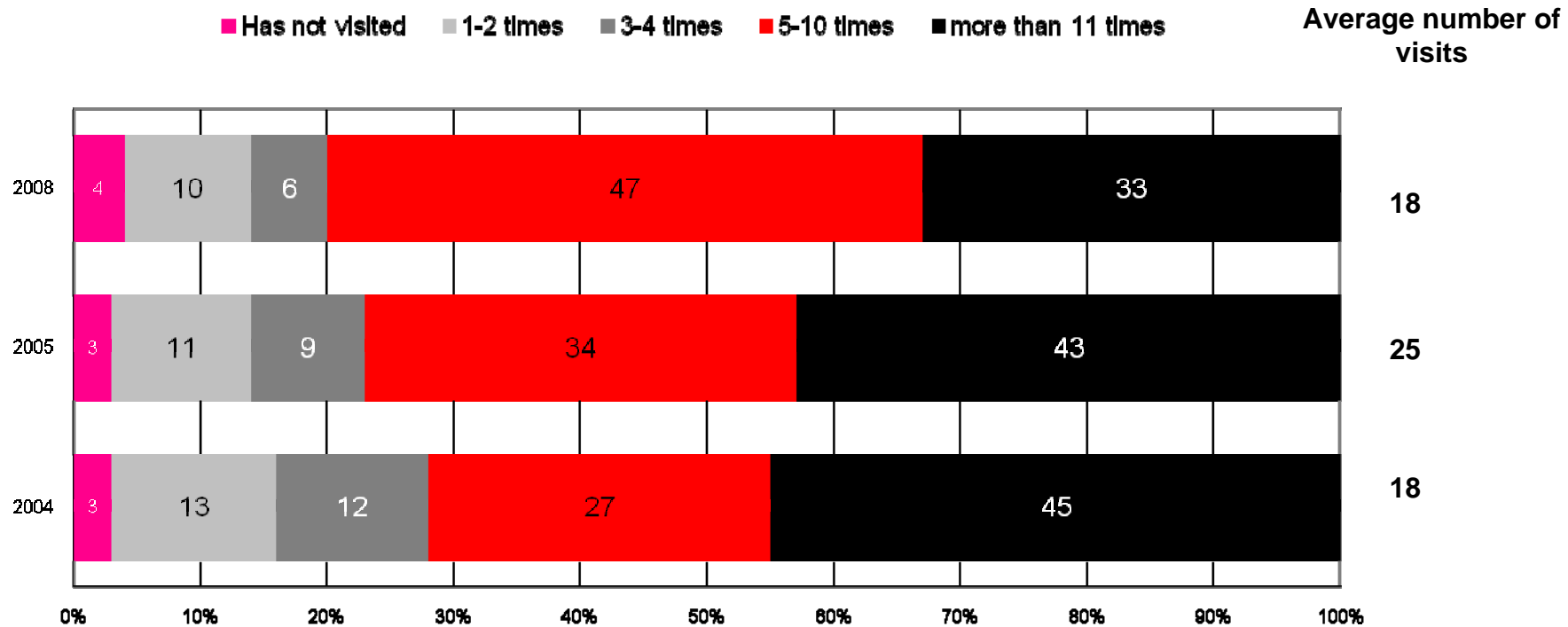
% of all the visitors who have arrived from Finland



The role of ferry operators has decreased. At the same time the Internet is used more frequently.

# Number of previous visits to Tallinn

% of all the visitors who have arrived from Finland



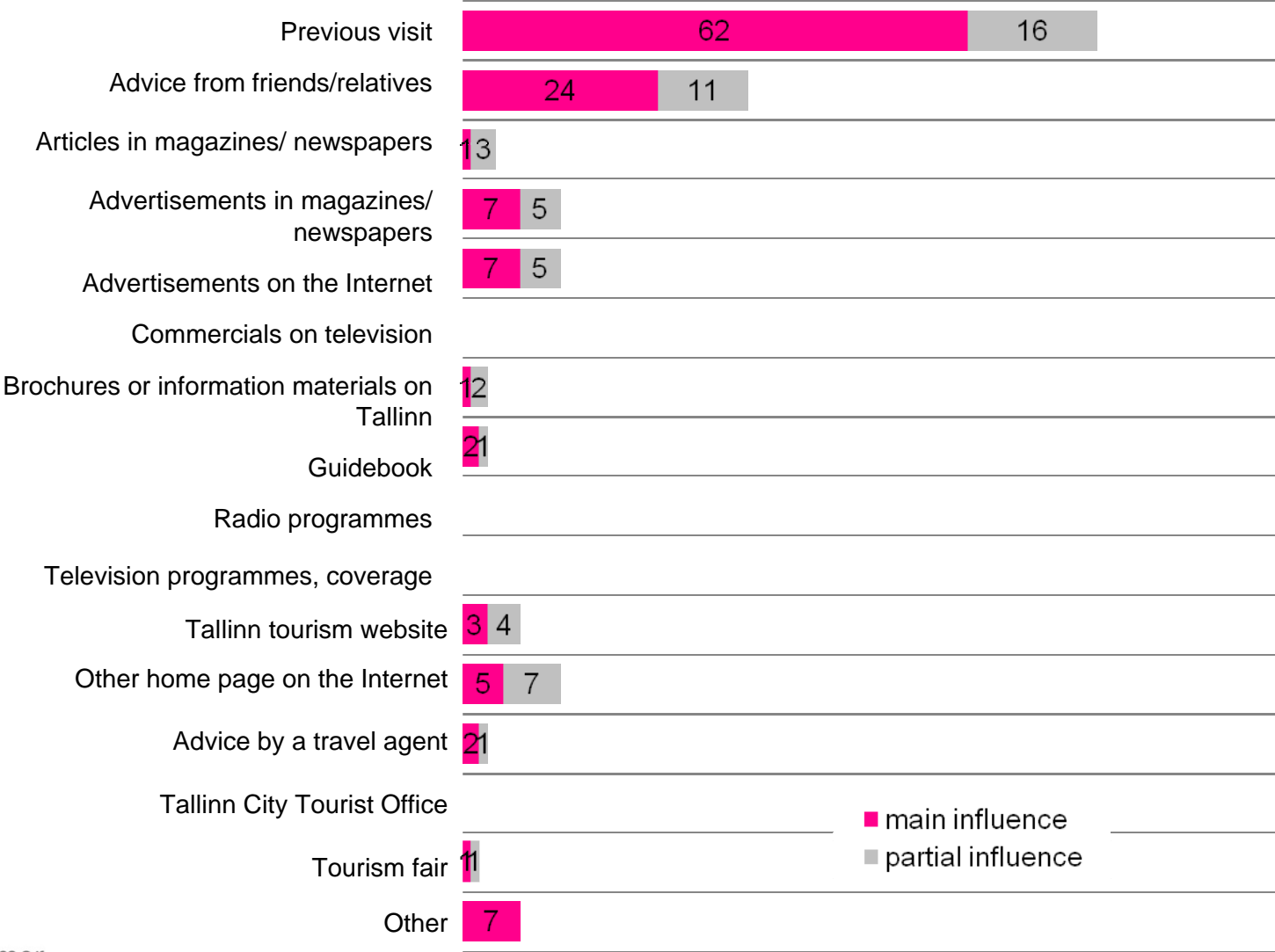
# Information sources about Tallinn

% of all the visitors who have arrived from Finland



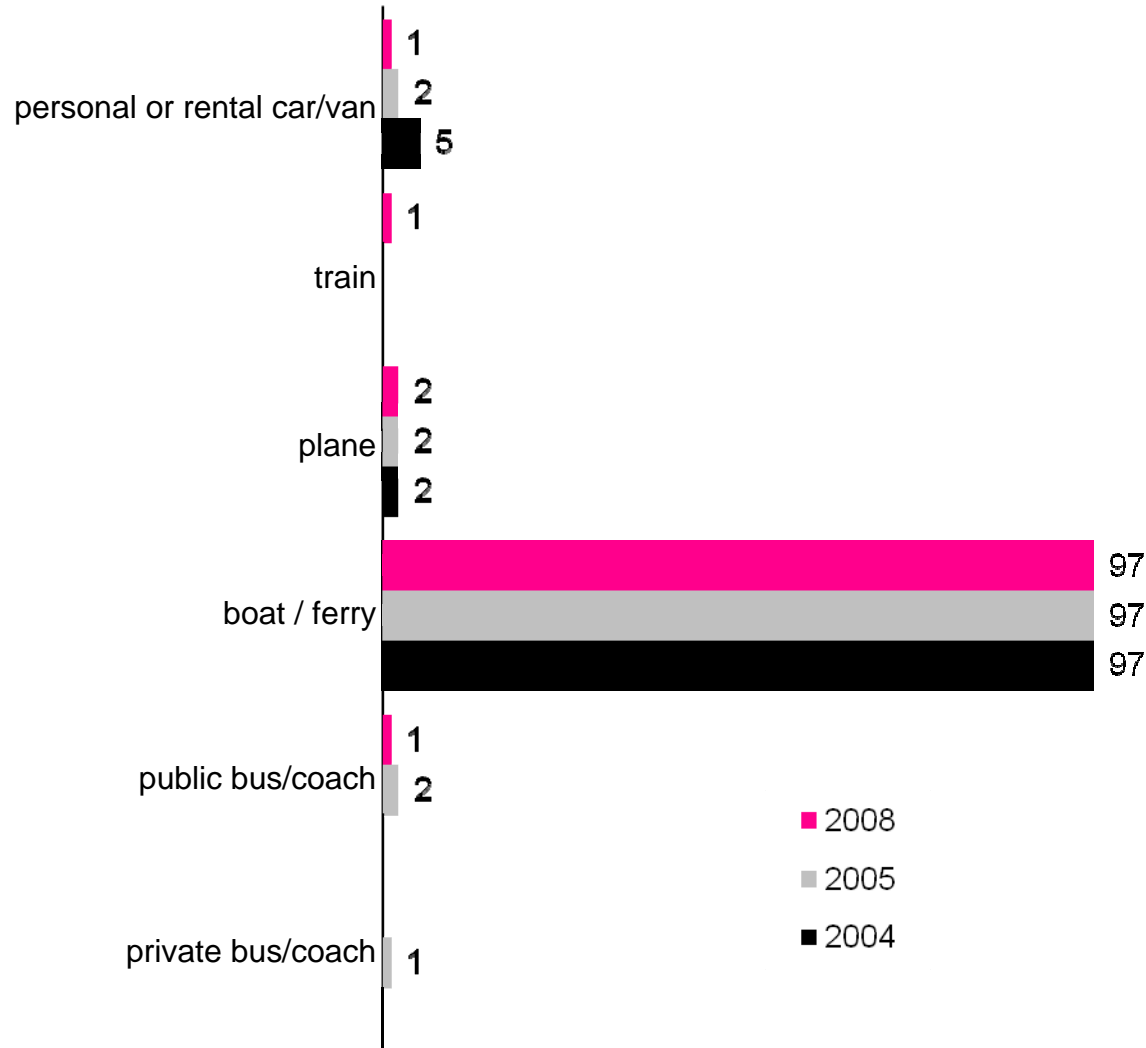
# Factors that Influence Visiting Tallinn

% of all the visitors who have arrived from Finland



# Transportation Used to Reach Tallinn

% of all the visitors who have arrived from Finland



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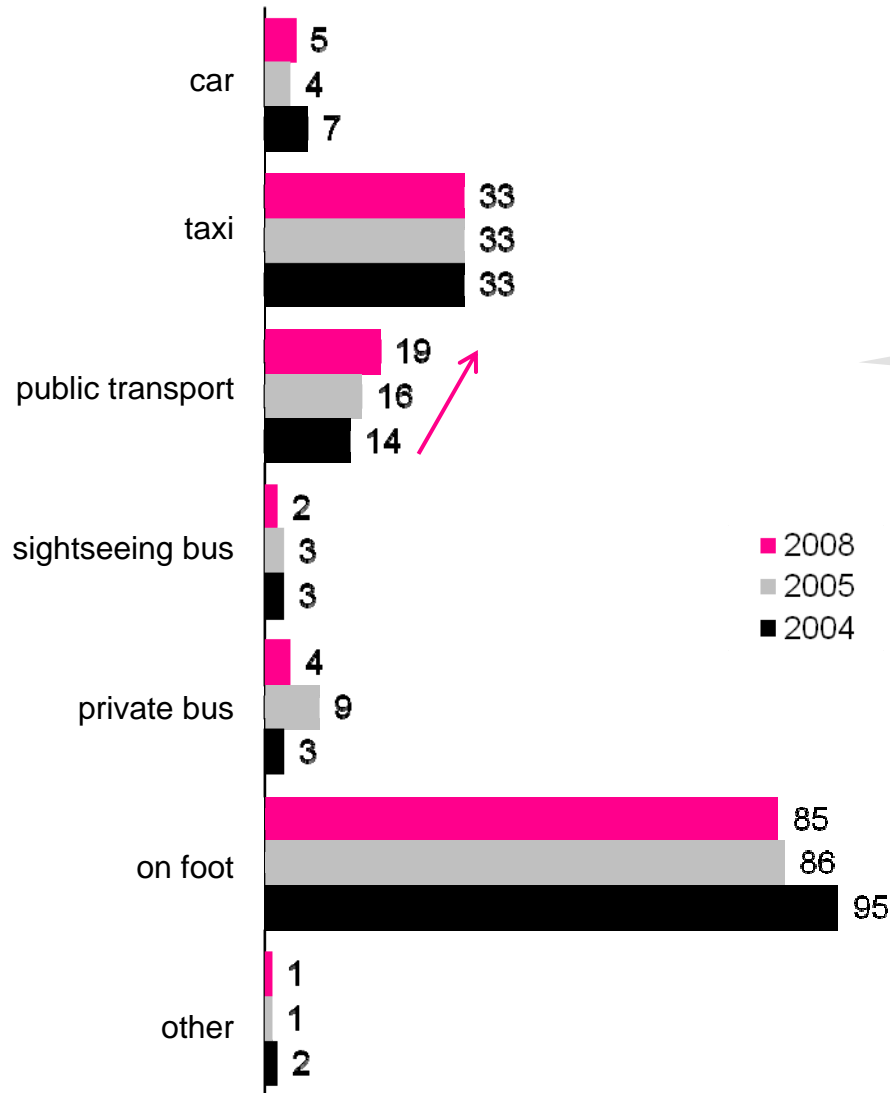
# Tallinn

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# The Transportation Used in Tallinn

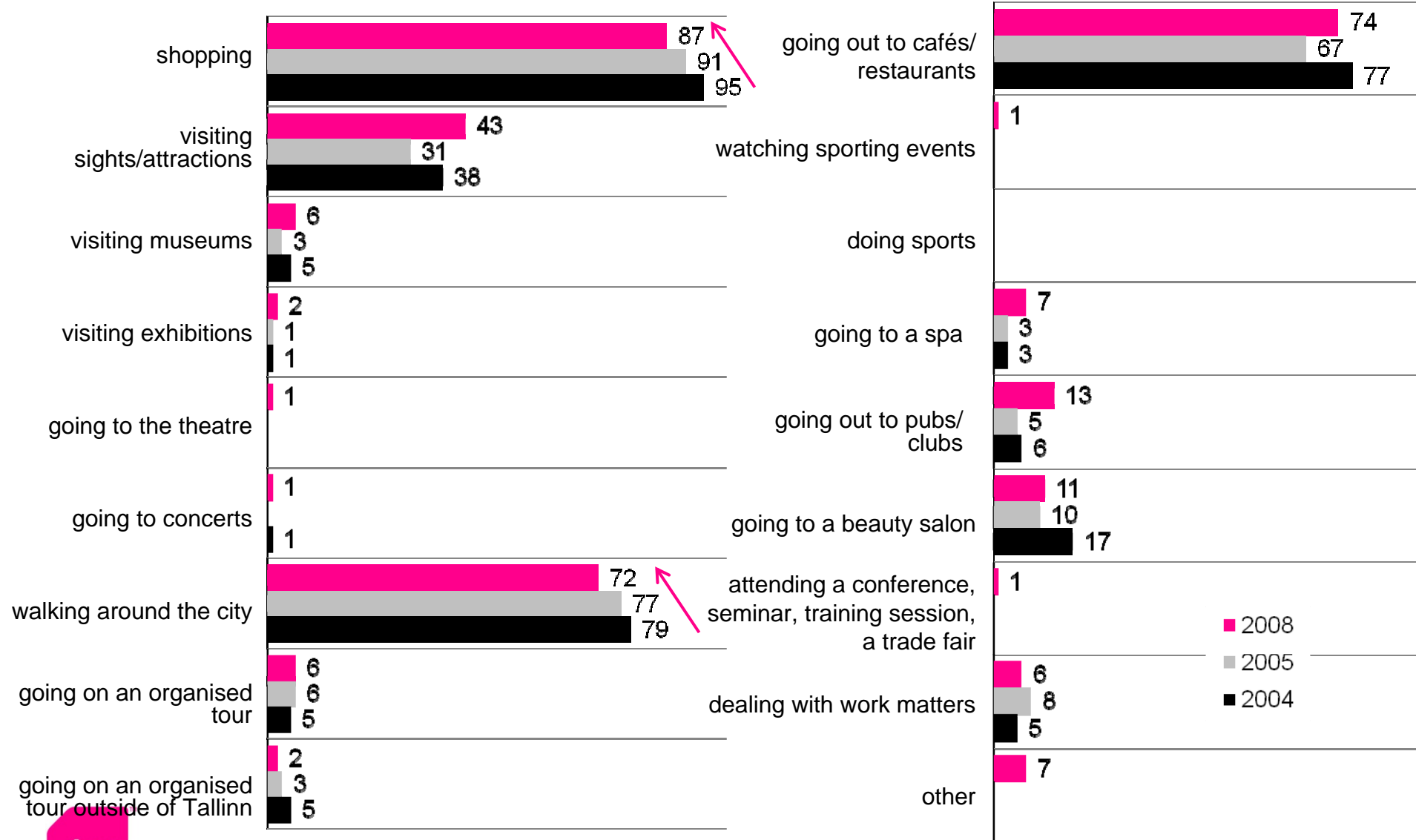
% of all the visitors who have arrived from Finland



Although getting around on foot is popular among Finns, public transportation is used more every year.

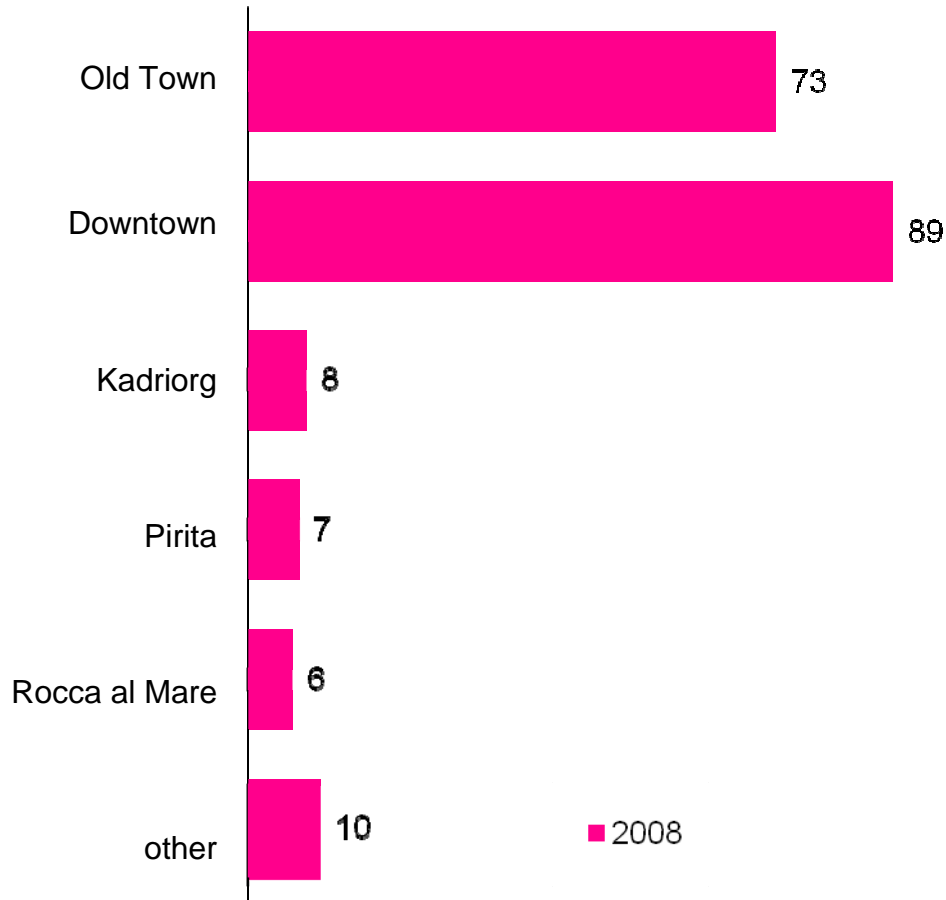
# Activities in Tallinn

% of all the visitors who have arrived from Finland



# Areas in Tallinn Visited

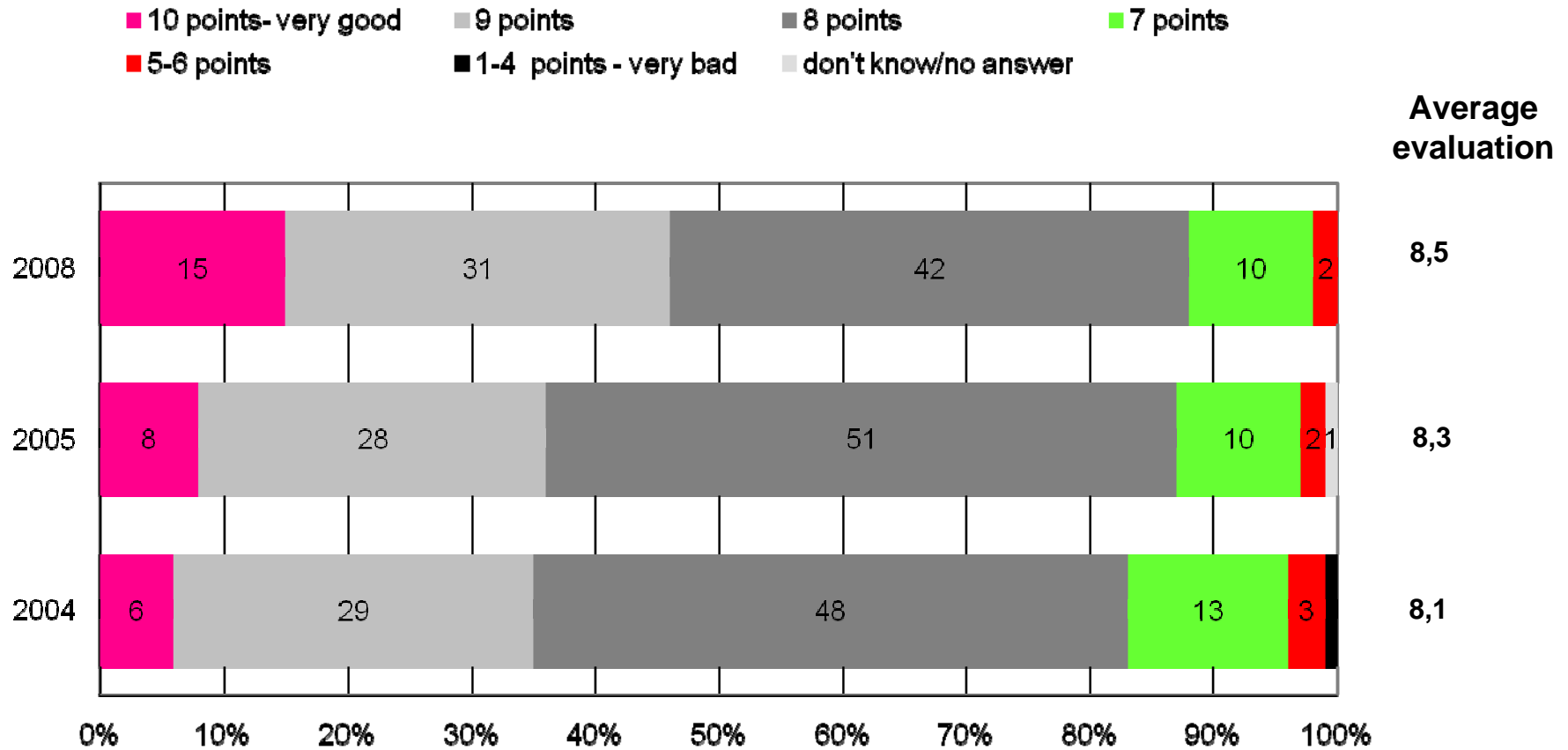
% of all the visitors who have arrived from Finland



In most cases Finns visit only city centre and the old town.

# Evaluation of Overall Impression of Tallinn Trip

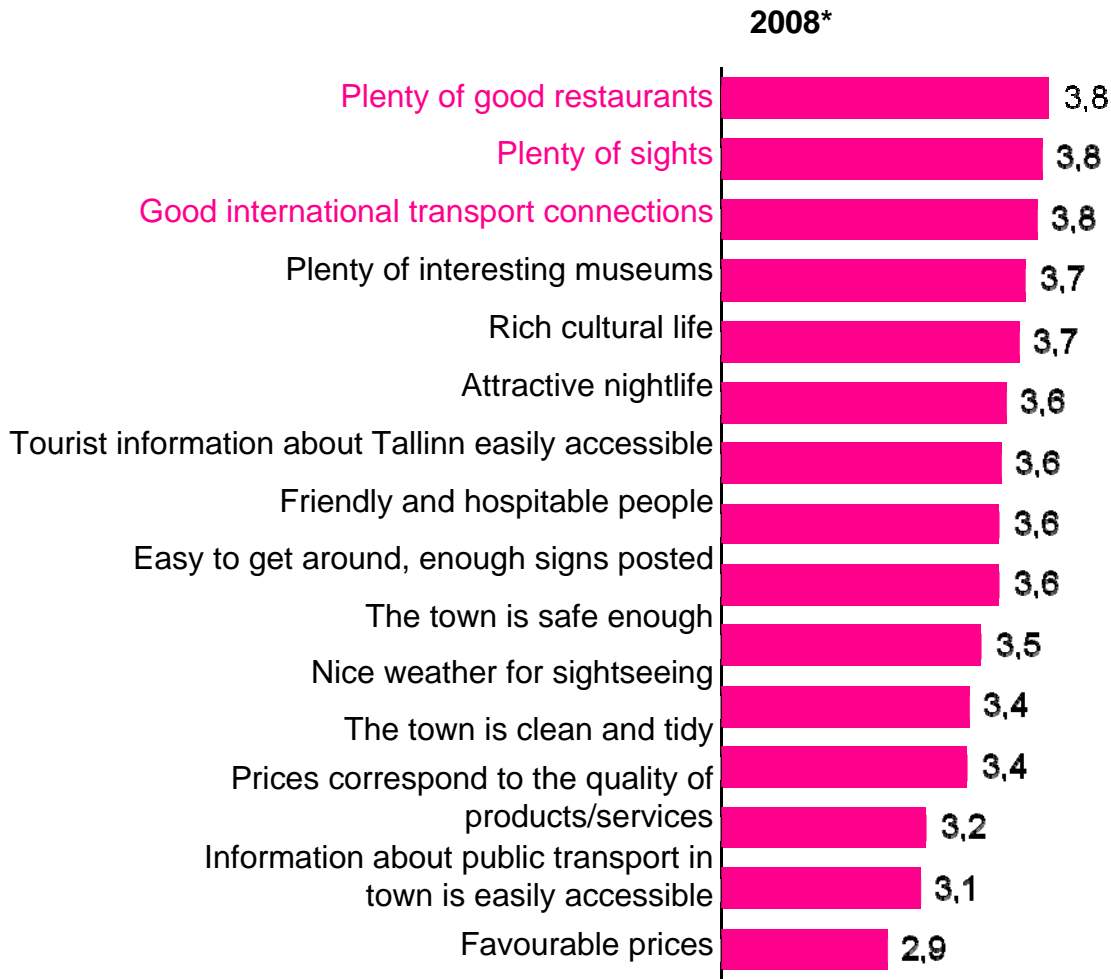
% of all the visitors who have arrived from Finland



The proportion of maximum evaluations has doubled between two periods ( 2005 and 2008).

# The Image of Tallinn

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

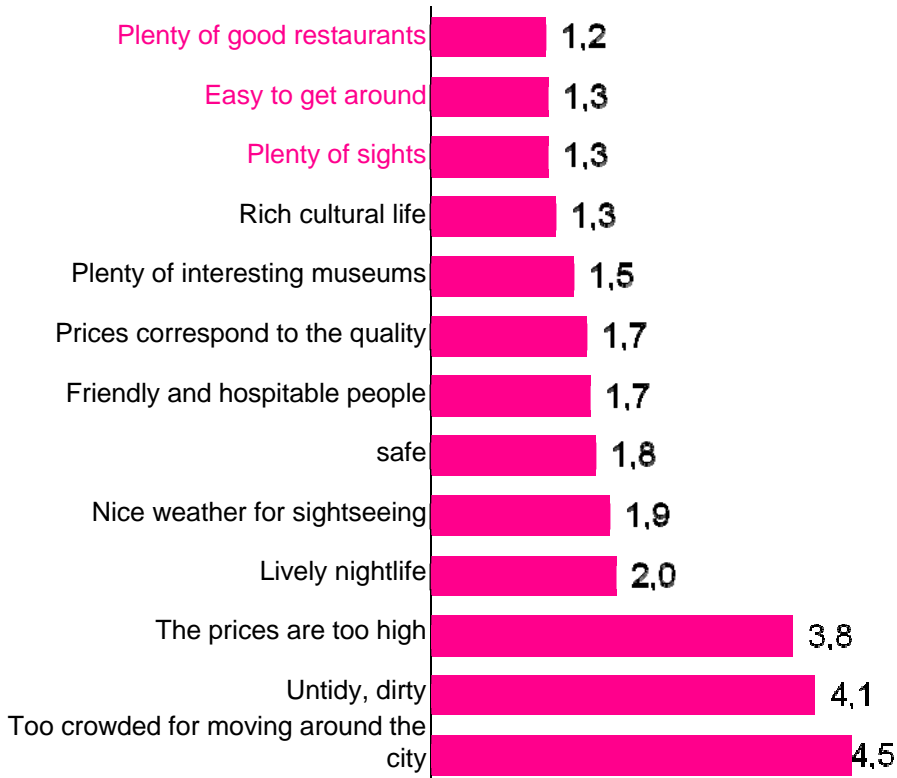


\*In 2008 the division of scale and the names of categories have been changed compared to the previous surveys. The results for 2004 and 2005 are presented in the next slides.

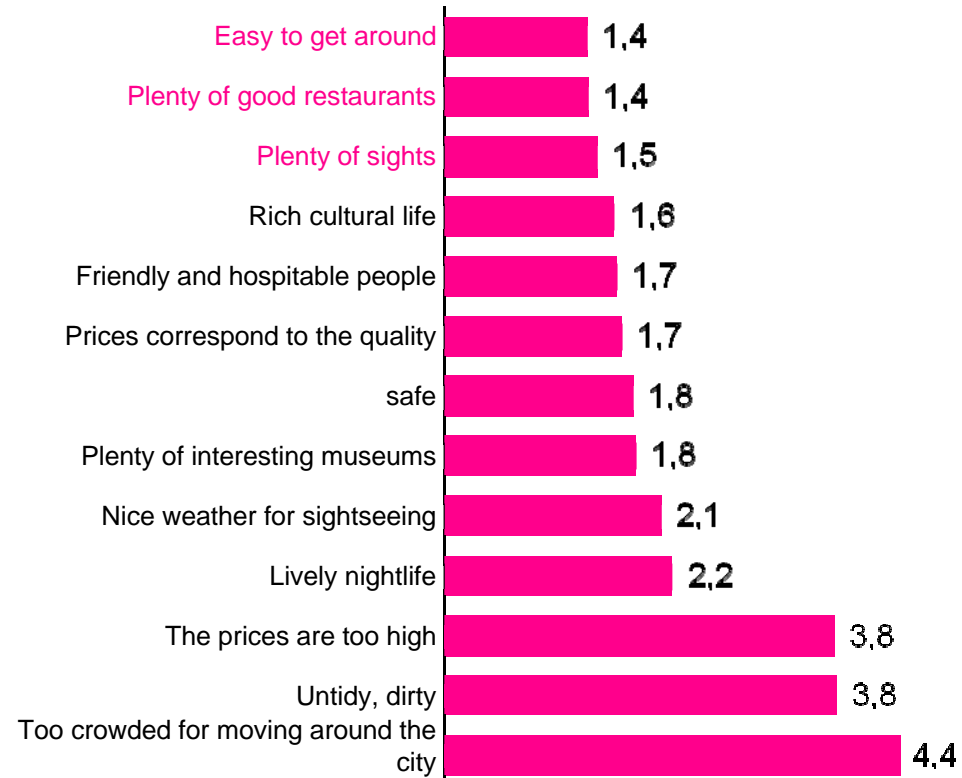
# Tallinn image in the eye of Finns

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

2005

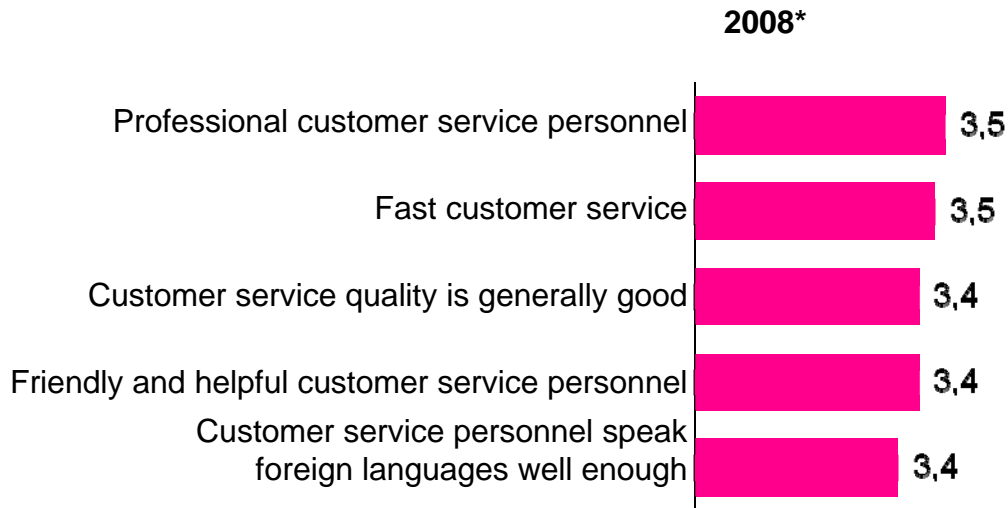


2004



# Tallinn customer service culture

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



Compared to other countries the satisfaction with customer service is higher among Finns.

\* 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

Restaurants, bars, eateries

Positive experience with Estonians

Shops, shopping centres

Hotels

Town Hall Square and its

surroundings

Cultural events and establishments

Cheap prices

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.

-

Language problems

Unfriendly customer service personnel

Cold or bad weather

Dirty or slippery streets

Not enough toilets in the streets

Expensive public transportation

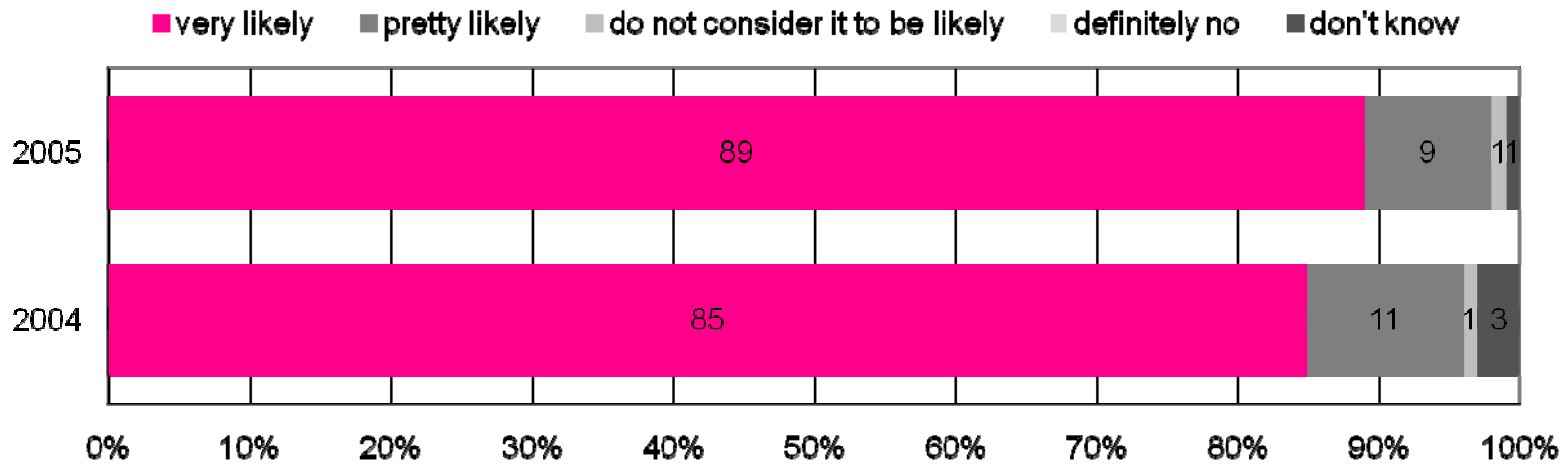
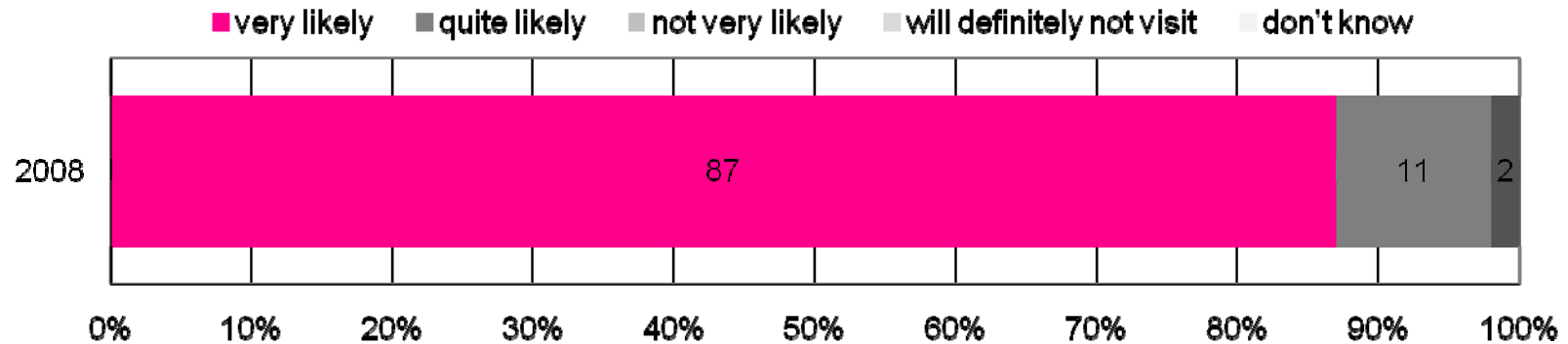
Not safe, a lot of pickpockets

Connected with hotels

# Likelihood of visiting Tallinn again

% of all the visitors who have arrived from Finland

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

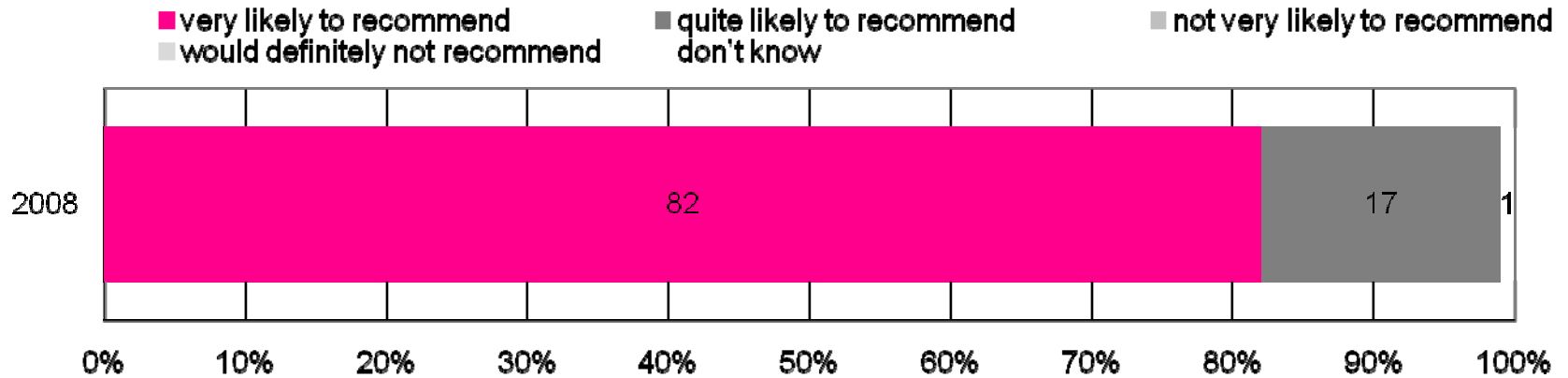


\* The answer options in 2004 and 2005 are different compared to 2008.

# Recommendation communication

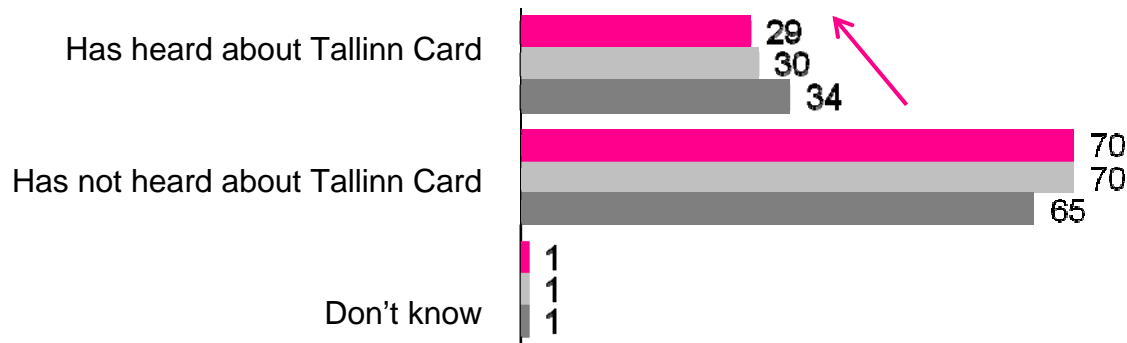
% of all the visitors who have arrived from Finland

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

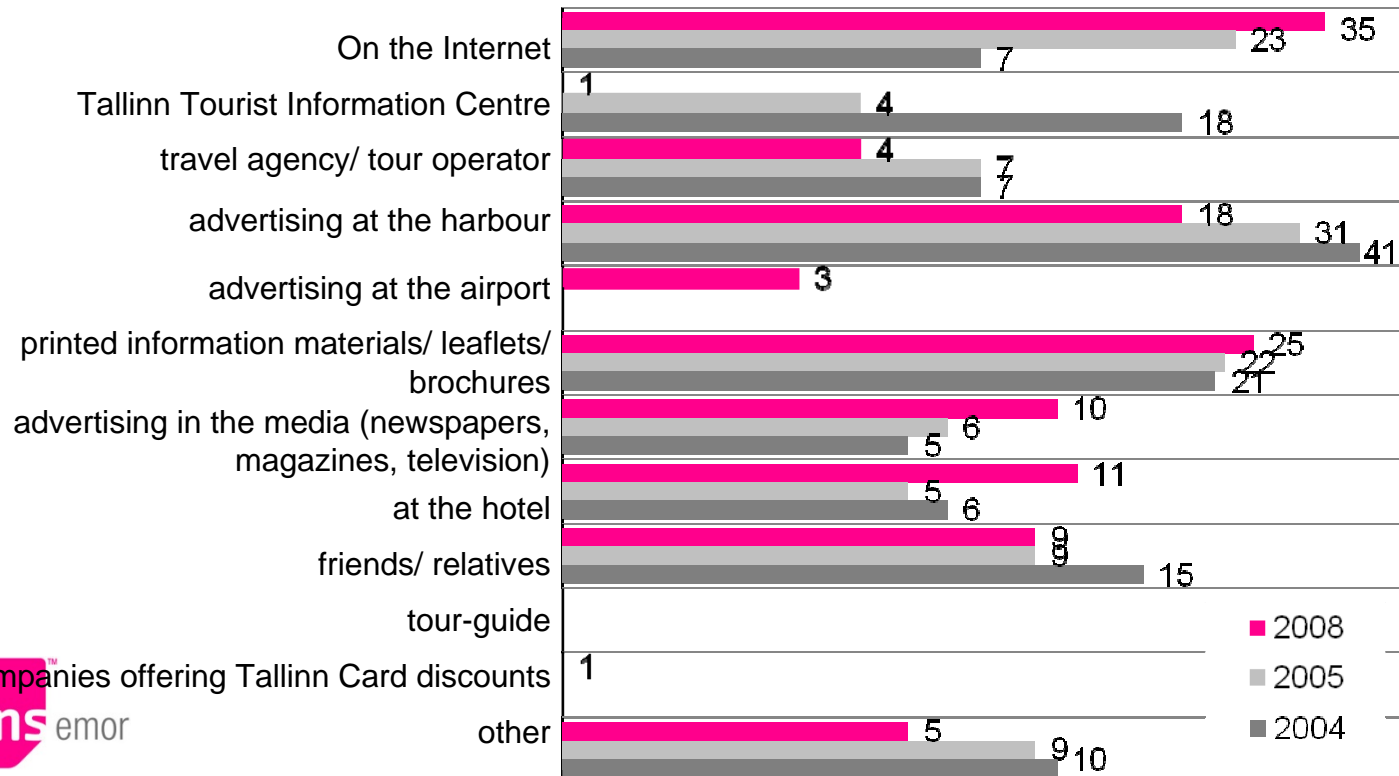


# Information about Tallinn Card

% of all the visitors who have arrived from Finland

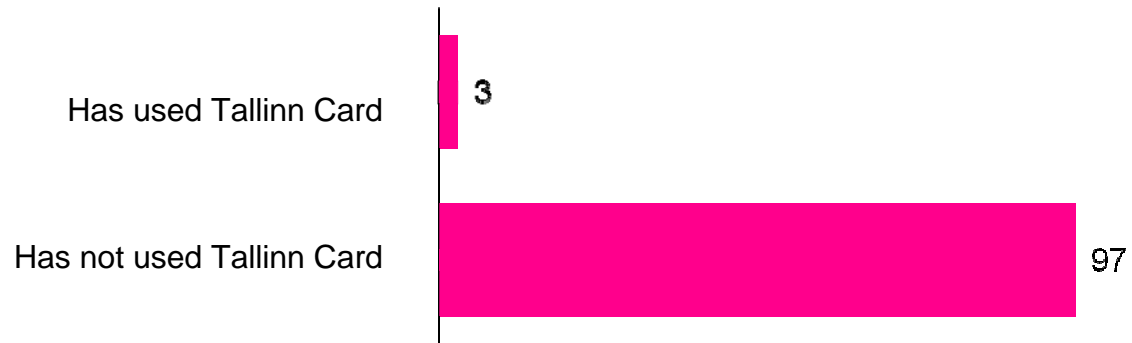


% of all the visitors who have heard about Tallinn Card



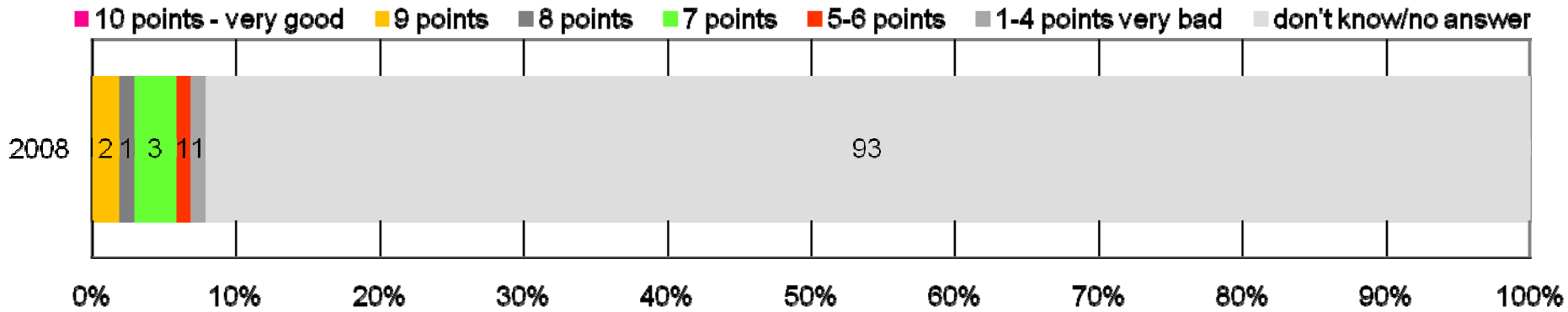
# The Usage of Tallinn Card

% of all the visitors who have heard about Tallinn Card



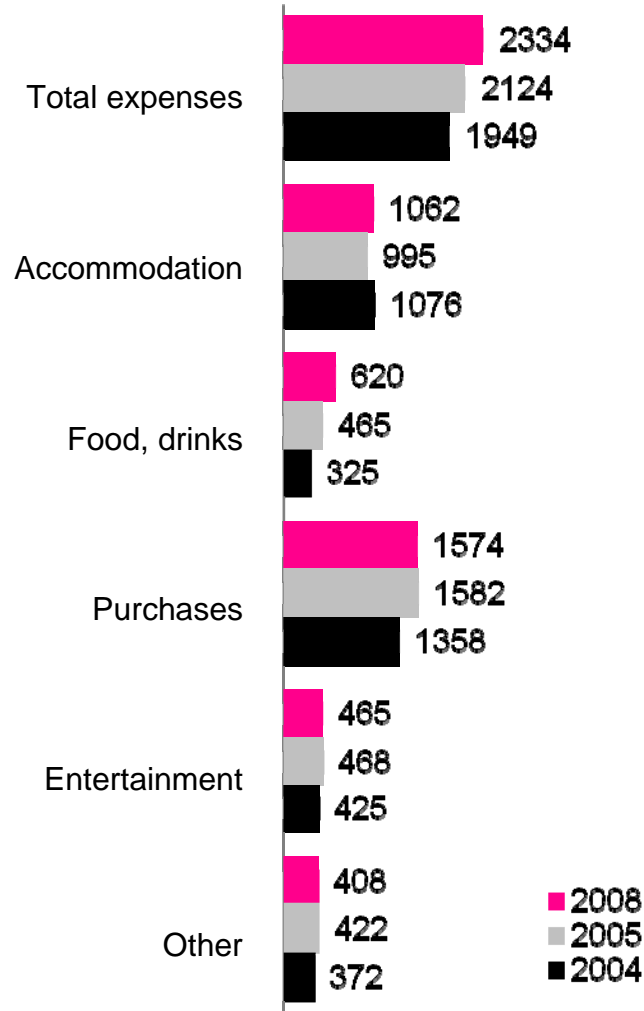
# Opinion about Tallinn Card

% of all the visitors who have heard about Tallinn Card, 29 % of Finns



# Average expenditures per person per day

Average expenditures per person



The expenditures on food have increased most among the Finns.

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# Summary

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# Summary (1)

## 52%\* of all Tallinn Foreign Visitors

- The Finns still make up half of all Tallinn foreign visitors, however the proportion has **decreased by – 8 %\*** compared to the previous period.
- Compared to the other countries the Finns who visit Tallinn are mostly older ( from 55 years), women and people from the lower social class. At the same time the results in 2008 show that **the proportion of younger and white-collar employees has increased** as well as the proportion of students that is constantly increasing. This has caused **changes in travel behaviour**.
- Compared to other countries, for Finns Tallinn is frequently the only travel destination, however the increase of younger people's proportion has caused the tendency that Tallinn is visited en route a trip with several destinations. Visiting Tallinn with a shopping purpose has decreased and the **proportion of holiday trips has slightly increased**. Although Tallinn is still just a little change for most of the Finns, it show a light tendency of decrease.
- Compared to the other countries, the Finns stay away from home the least ( 2 nights in average, when at the same time other nations stay for 4-8 nights). Nevertheless, the Finns have **begun to stay more overnight in Tallinn and elsewhere in Estonia** instead of staying overnight in the ship. The mid-range hotels are still the most popular, however staying overnight at friends/relatives has increased dramatically, this could be more characteristic to younger people.
- Nearly half (48 %) of the Finns who stay overnight in Estonia book one's accommodation via travel agency/tour operator, however compared to previous research this proportion has dropped considerably ( comparison 64 % in 2005). A great proportion (20%) has started using **Internet options** for this purpose. Furthermore, the same tendency can be sighted in case of booking one's transportation.

# Summary (2)

## 52%\* of all Tallinn Foreign Visitors

- Practically all Finns who stay overnight in Tallinn, book their accommodation in advance and do it mainly one month in advance.
- The proportion of those Finns who have visited Estonia for more than 11 times has decreased significantly ( 43% in 2005 vs 33% in 2008) and this can be well-seen in **the decrease of average number of visits** to 18 % ( 25 % in 2005).
- Since most of the Finns have visited Tallinn before (only 4 % has not), then the main information source on Tallinn is the previous visit. However, even here it can be seen that the proportion of **Internet** has increased compared to other information sources ( 15 % have seen the advertisement on the Internet, 14 % can recall some other homepage on the Internet). The same tendency can be seen looking at the factors that influence visiting Tallinn.
- The main activities in Tallinn are similar to the previous surveys- shopping, walking around the city and visiting cafes/ restaurants. Compared to previous surveys **the proportion of shopping and walking is dropping**. The proportion of Finns who **go out to pubs and nightclubs has increased as well as spending time in restaurants/cafes and spas**. Although, sightseeing is increasing, it cannot be said about other cultural activities like going to theatre or visiting a concert: compared to other countries the Finns still take part in considerably less cultural activities. While staying in Tallinn the Finns prefer to stay in the Old Town and the city centre.

# Summary (3)

## 52%\* of all Tallinn Foreign Visitors

- The average overall impression of Tallinn has increased compared to the two previous surveys (8,3 in 2005 vs 8,5 in 2008), **the proportion of Finns who give Tallinn the highest rankings has doubled.**
- The satisfaction with different aspects of Tallinn among Finns, including service, **is higher than in average.** The Finns appreciate more Tallinn's shopping possibilities, restaurants, eateries, hotells and cheap prices.
- Due to the positive previous experience, almost all Finns are **eager to visit Tallinn again** in the next 5 years and are most likely to recommend Tallinn to their friends/ relatives.
- **The popularity and usage of Tallinn Card** is pretty **modest** among the Finns- nearly one third has heard about it and from those only 3% has used Tallinn Card, so there is very few of them who are able to evaluate the price-quality proportion.
- The average expenditures in Tallinn by the Finns **have increased by 10 %** (in 2005 2124 croons per person in a day, 2334 croons a day per person in 2008) and this is mainly due consumption of food and drinks.