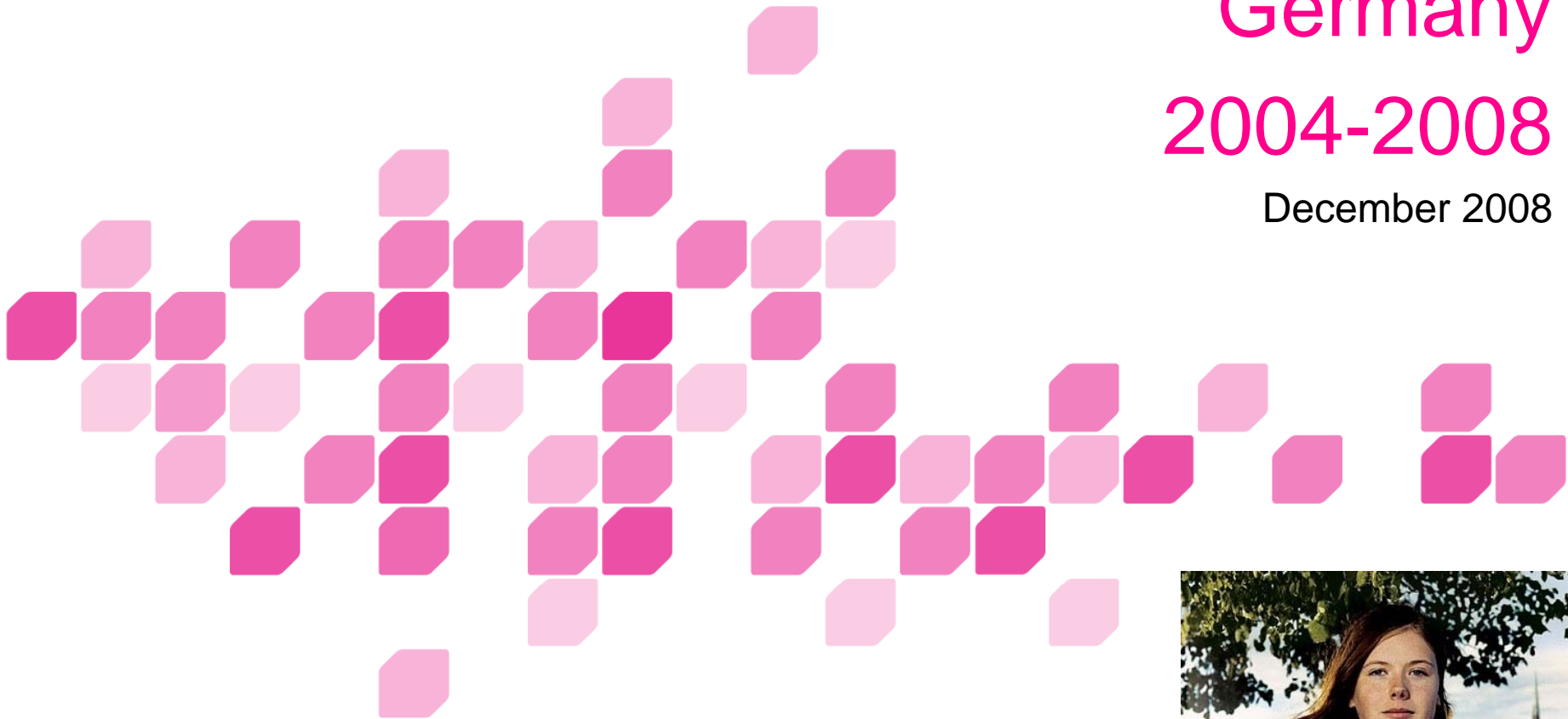


# Great Britain and Germany

## 2004-2008

December 2008



# Sample

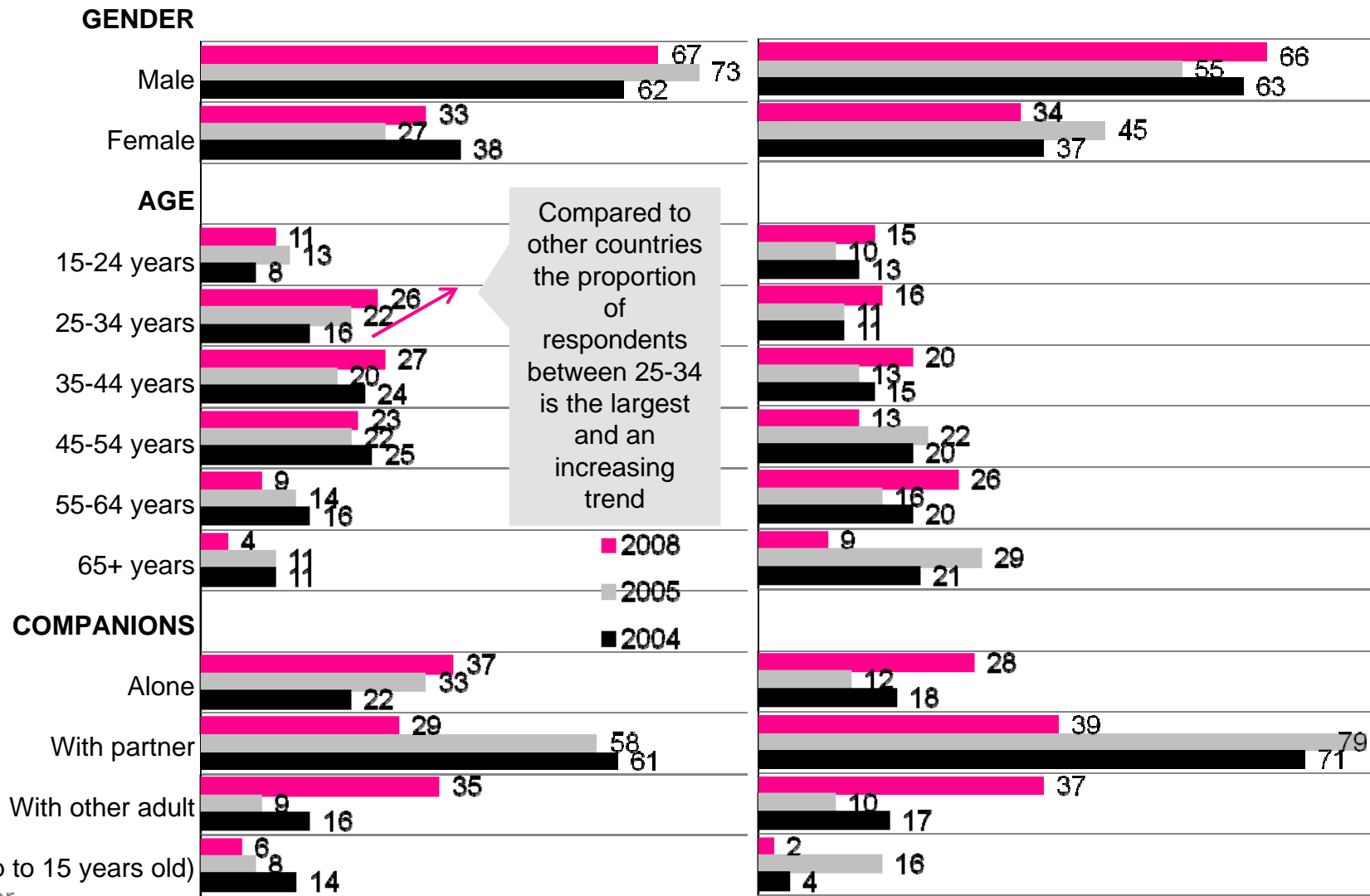
- **Great Britain** sample size:
  - 2008 – 114
  - 2005 – 94
  - 2004 – 95
- In 2008 79% of visitors from Great Britain were interviewed at the airport, 9% in Ikla checkpoint, 7% at the harbour, 2% on the streets, 1% in Narva and 1% in other places (in 2005 71% at the airport, 17% in Ikla checkpoint, 12% at the harbour).
- The proportion of visitors from Great Britain from among all visitors **has generally remained the same as in year 2005** (3% in 2005 and 24%\* in 2008).
  
- **Germany** sample size
  - 2008 – 122
  - 2005 - 115
  - 2004 – 126
- In 2008 68% of visitors from Germany were interviewed at the airport, 19% in Ikla checkpoint and 13% at the harbour (in 2005 35% at the harbour, 33% at the airport, 30% in Ikla checkpoint, 1% in Narva)
- The proportion of visitors from Germany has **increased** slightly compared to year 2005 (5%\* in 2008 vs 4% 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

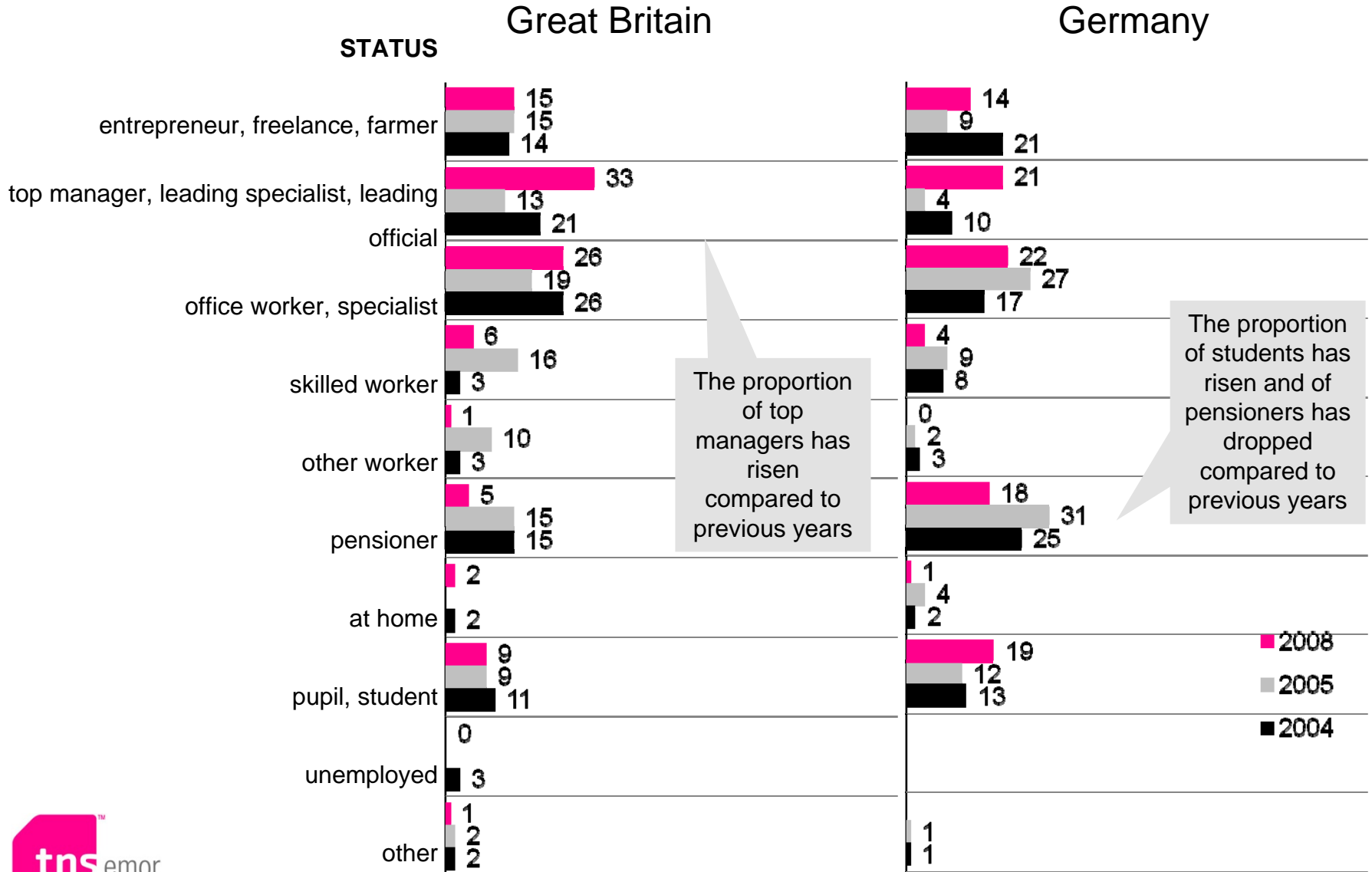
## Great Britain

## Germany



# 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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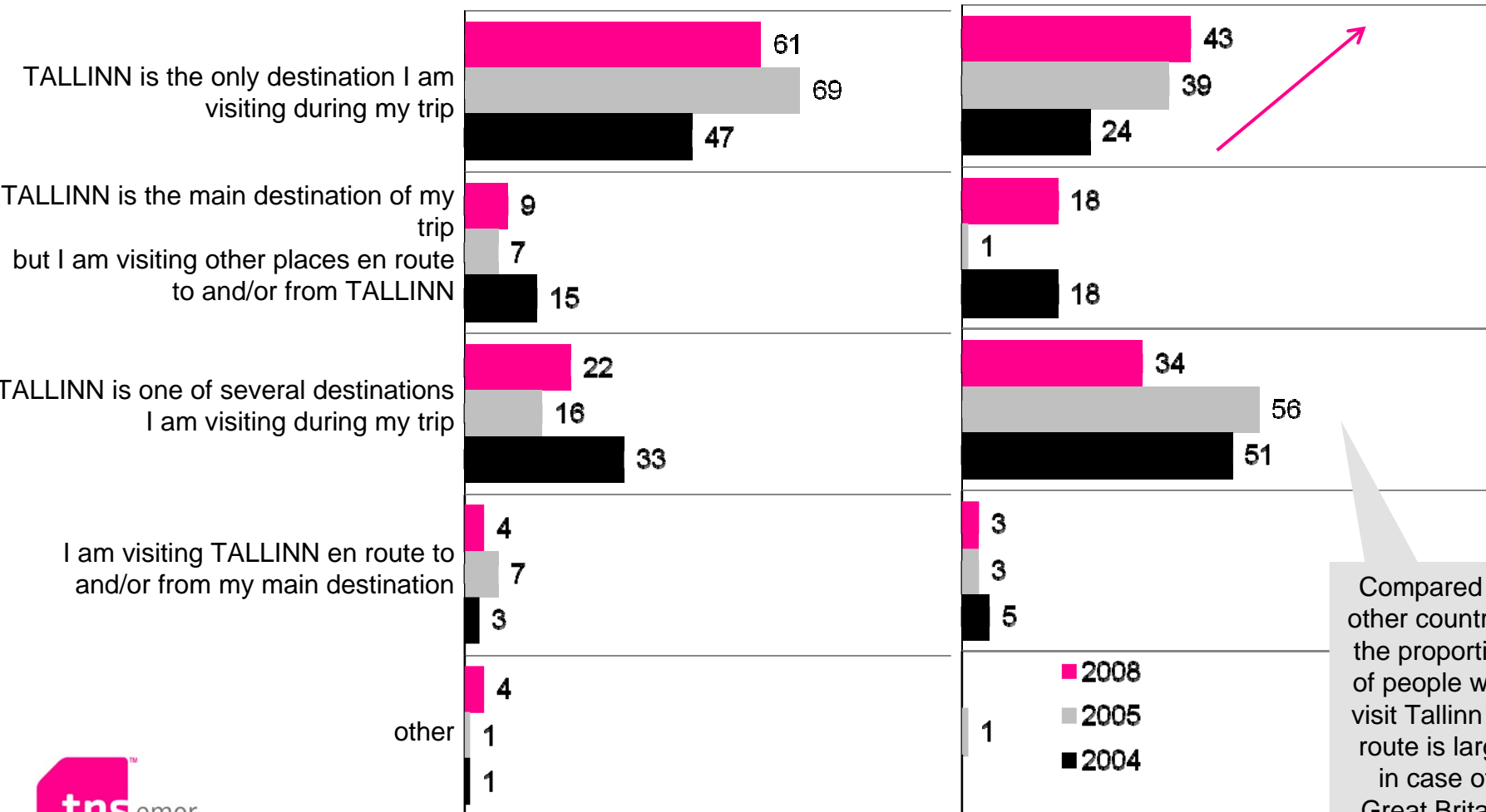


# Tallinn as the holiday destination

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

## Great Britain

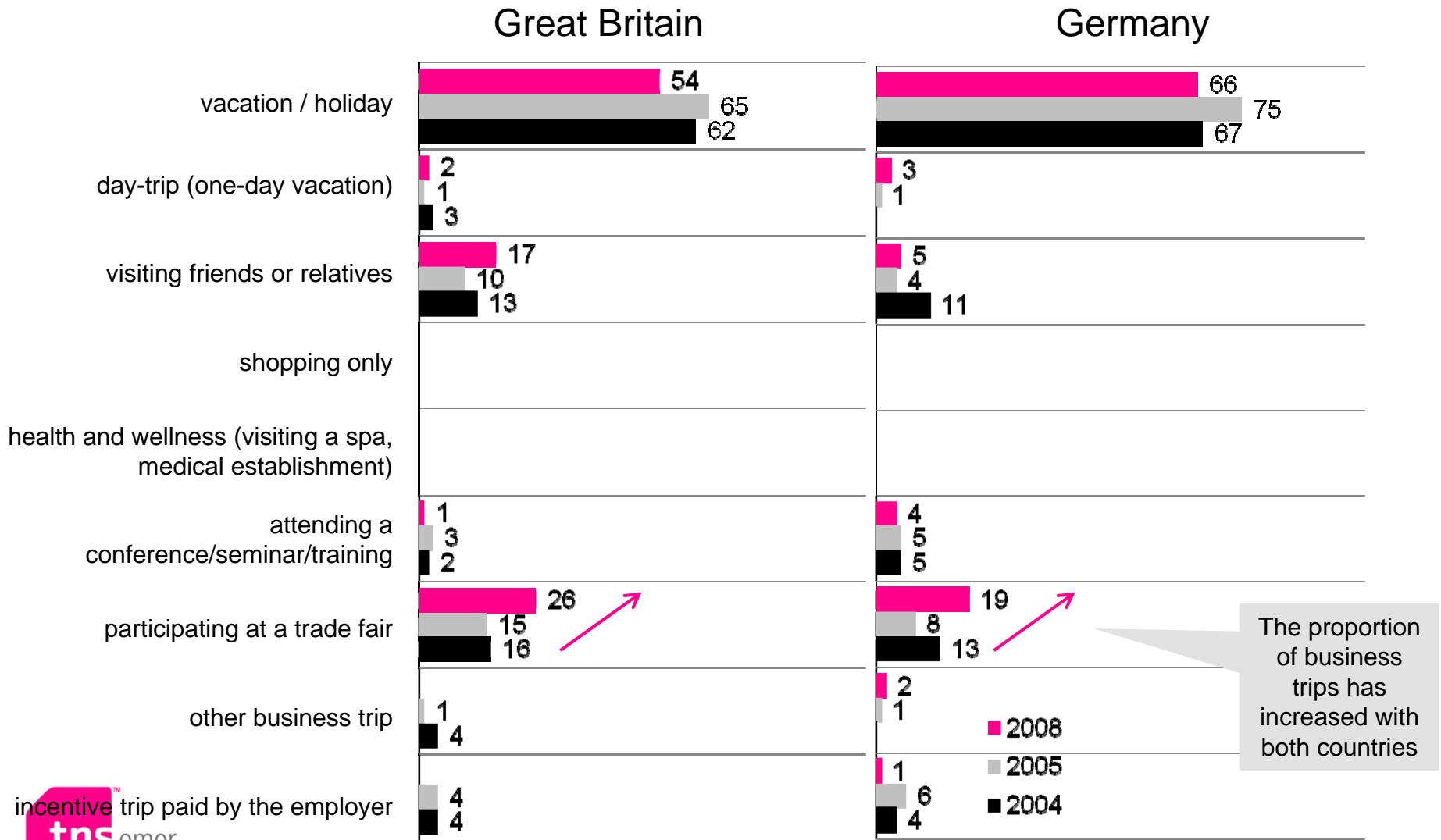
## Germany



Compared to other countries the proportion of people who visit Tallinn en route is large in case of Great Britain and Germany

# The purpose of the trip

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



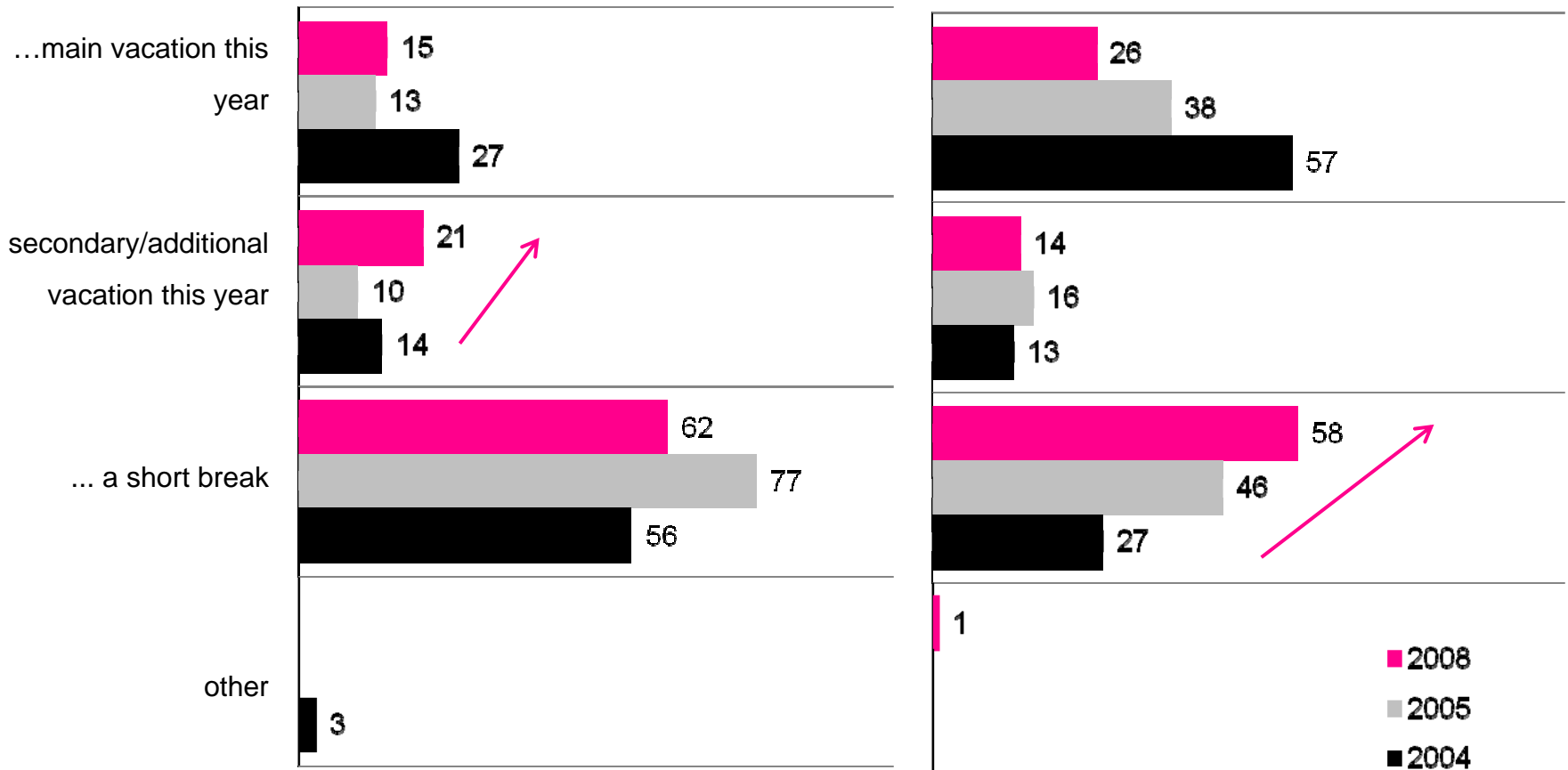
The proportion of business trips has increased with both countries

# 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

## Great Britain

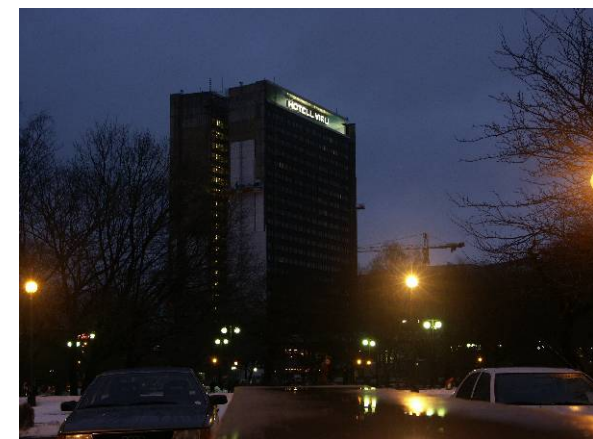
## Germany



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# Staying overnight and accommodation

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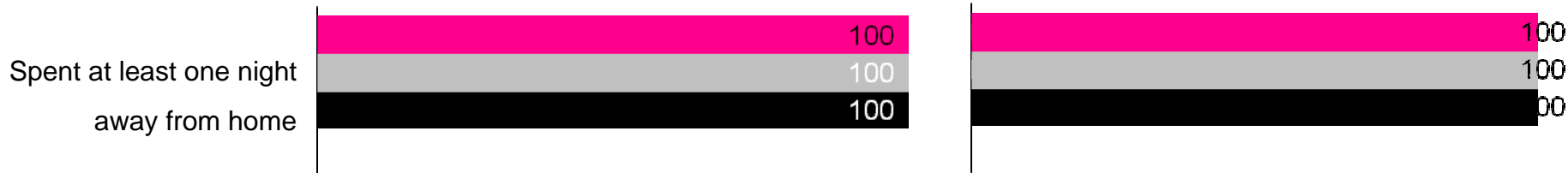


# Nights spent away from home during the trip

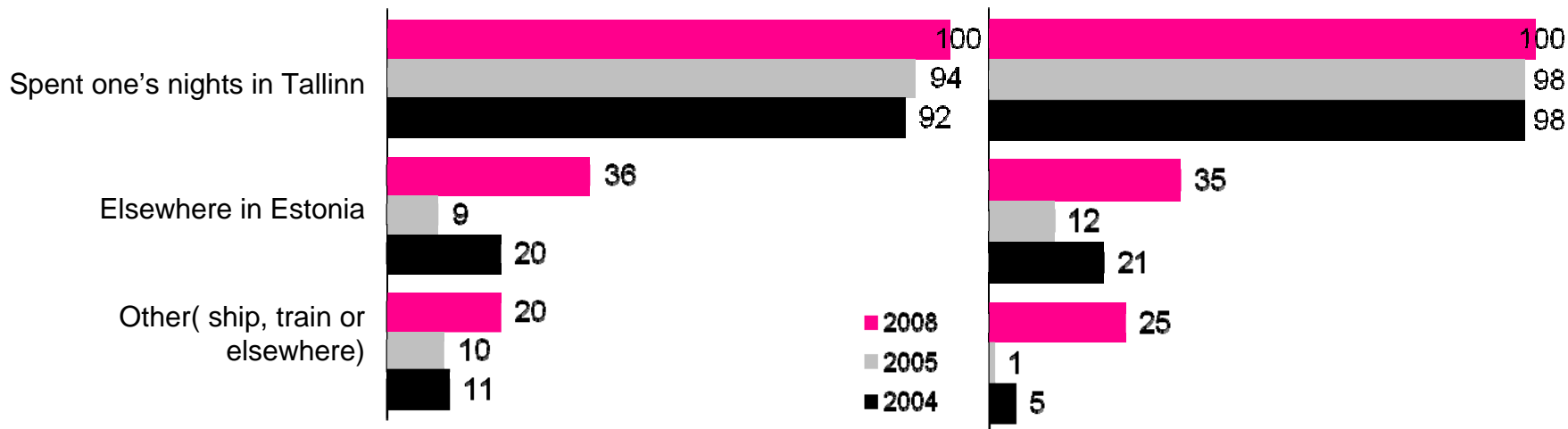
% of all the visitors who have arrived from a particular country

## Great Britain

## Germany



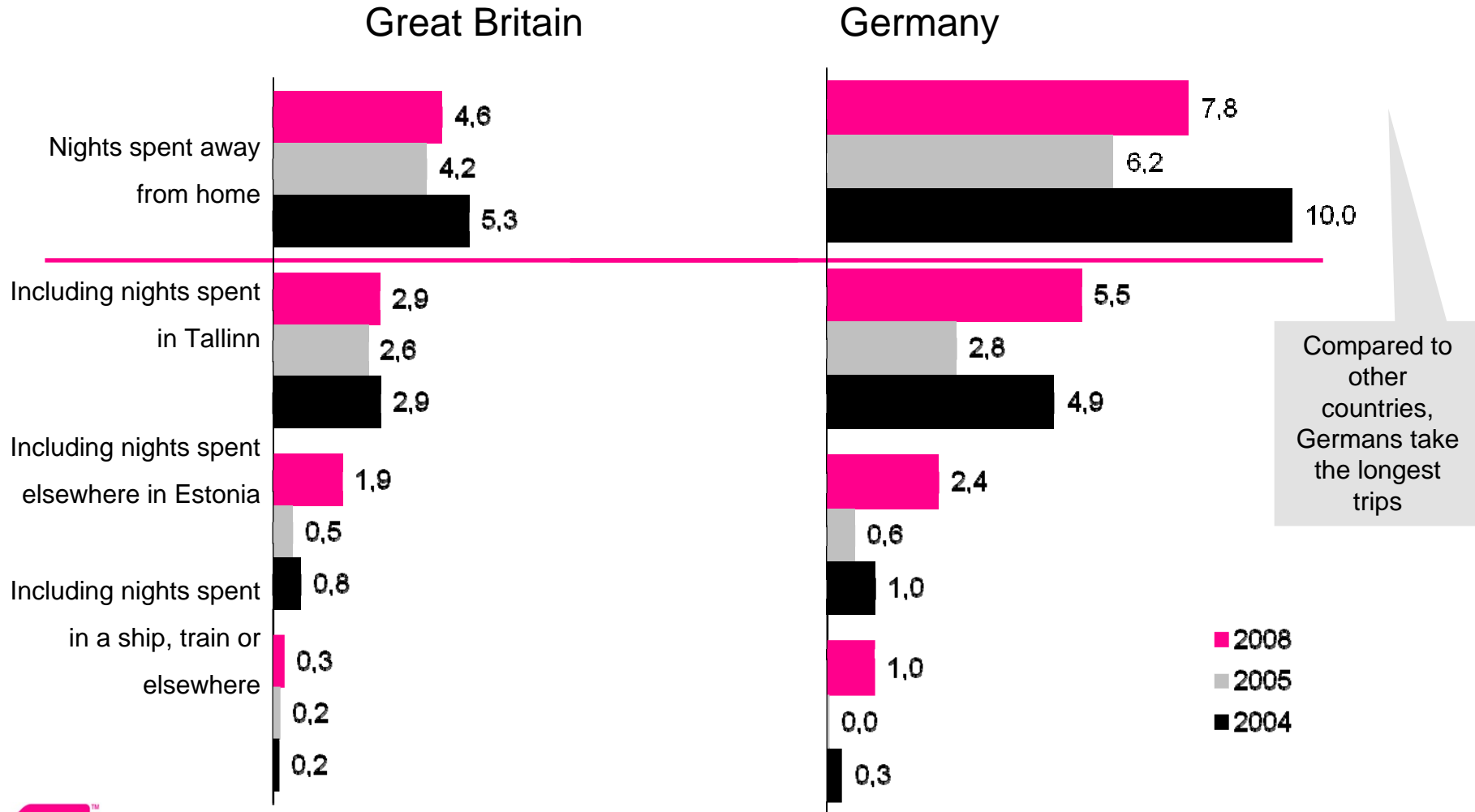
% of all the visitors, who have spent nights away from home



# Spending nights away from home

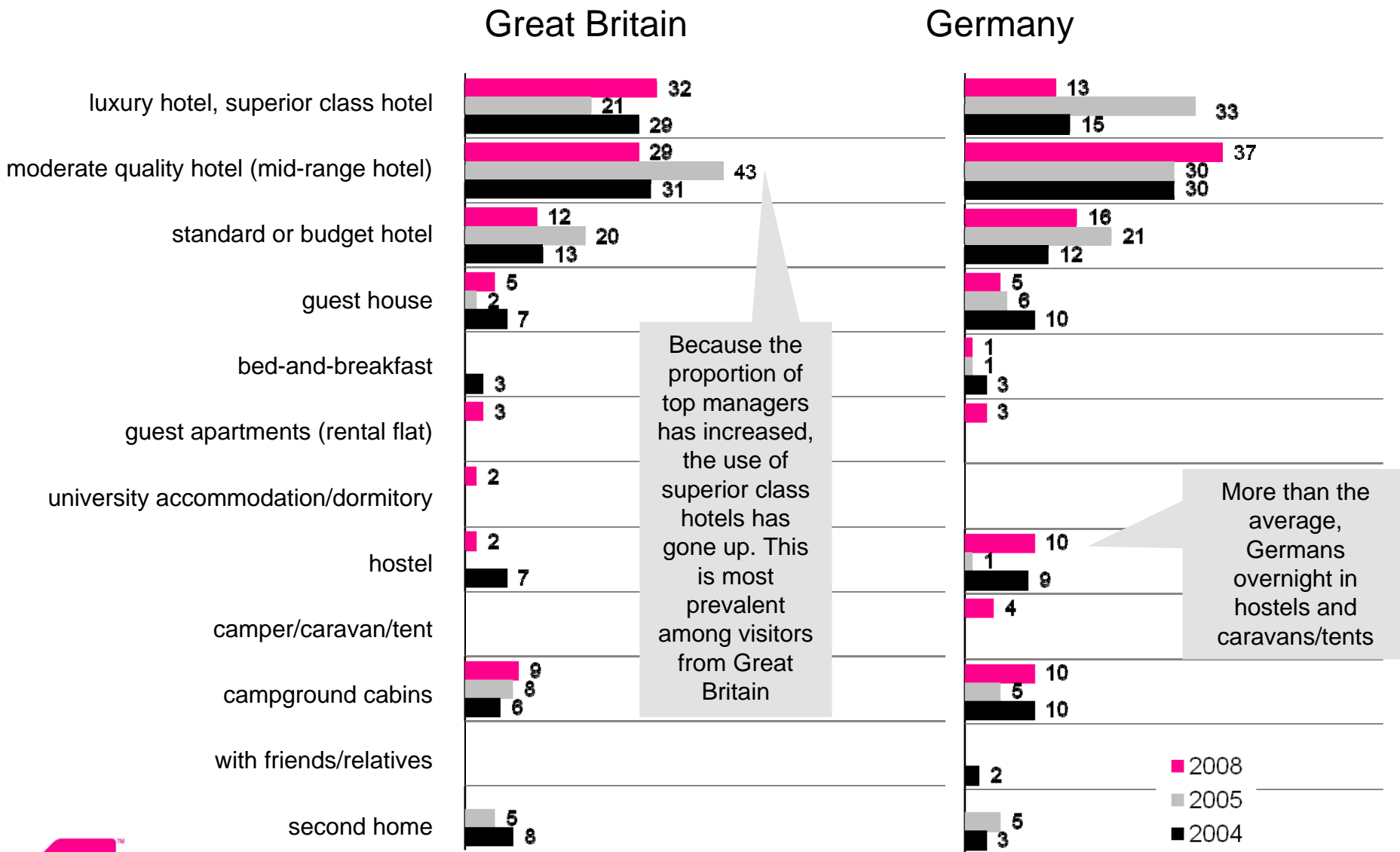
the number of average nights spent away from home

(of all the visitors who have arrived from 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



Because the proportion of top managers has increased, the use of superior class hotels has gone up. This is most prevalent among visitors from Great Britain

More than the average, Germans overnight in hostels and caravans/tents

## Before arriving in Tallinn



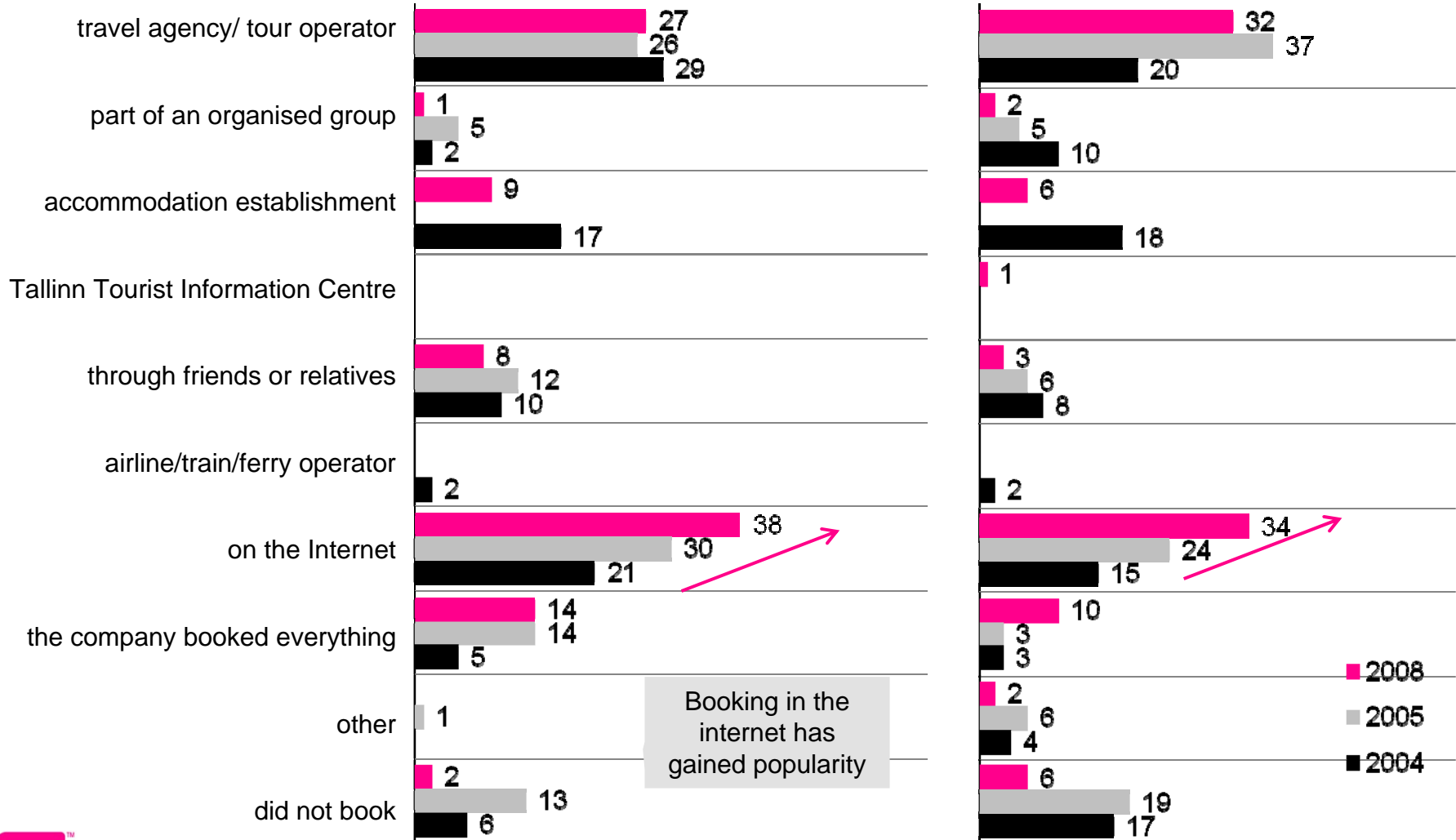
# Booking accommodation

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

Great Britain 81%, Germany 83%

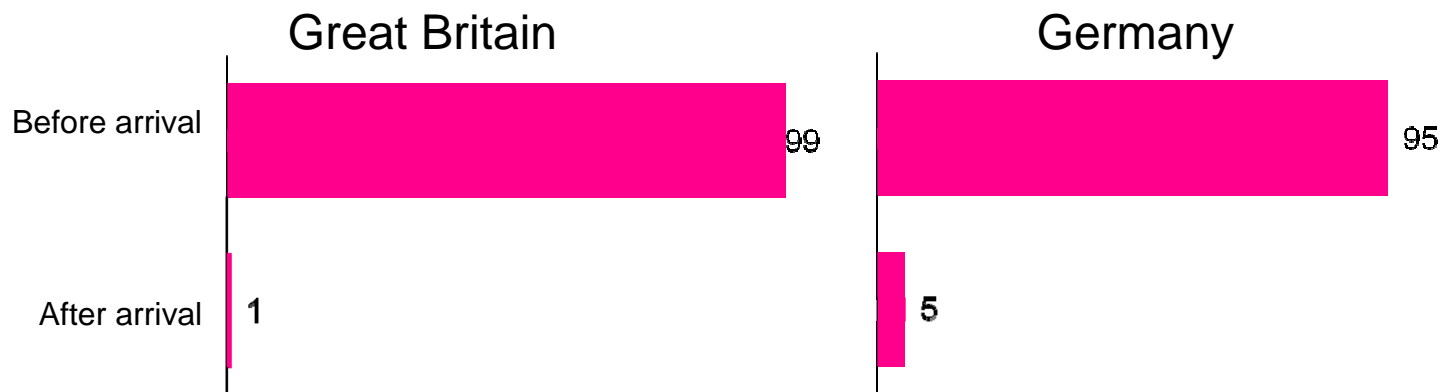
## Great Britain

## Germany



# Booking accommodation

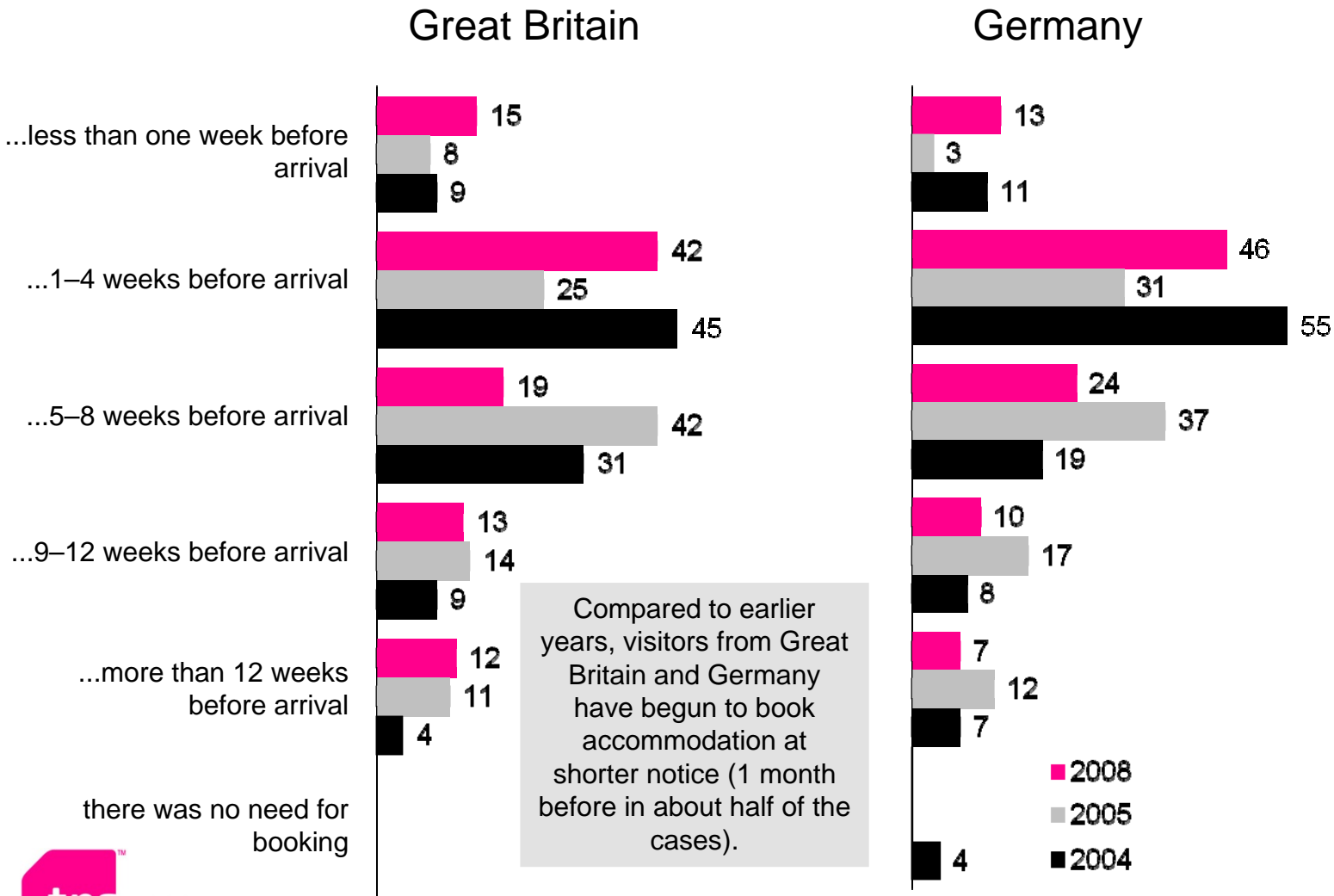
% of all the visitors who have arrived, who have spent at least one night in Tallinn staying in an accommodation establishment and who has booked one's accommodation ( Great Britain 79%, Germany 74%)



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

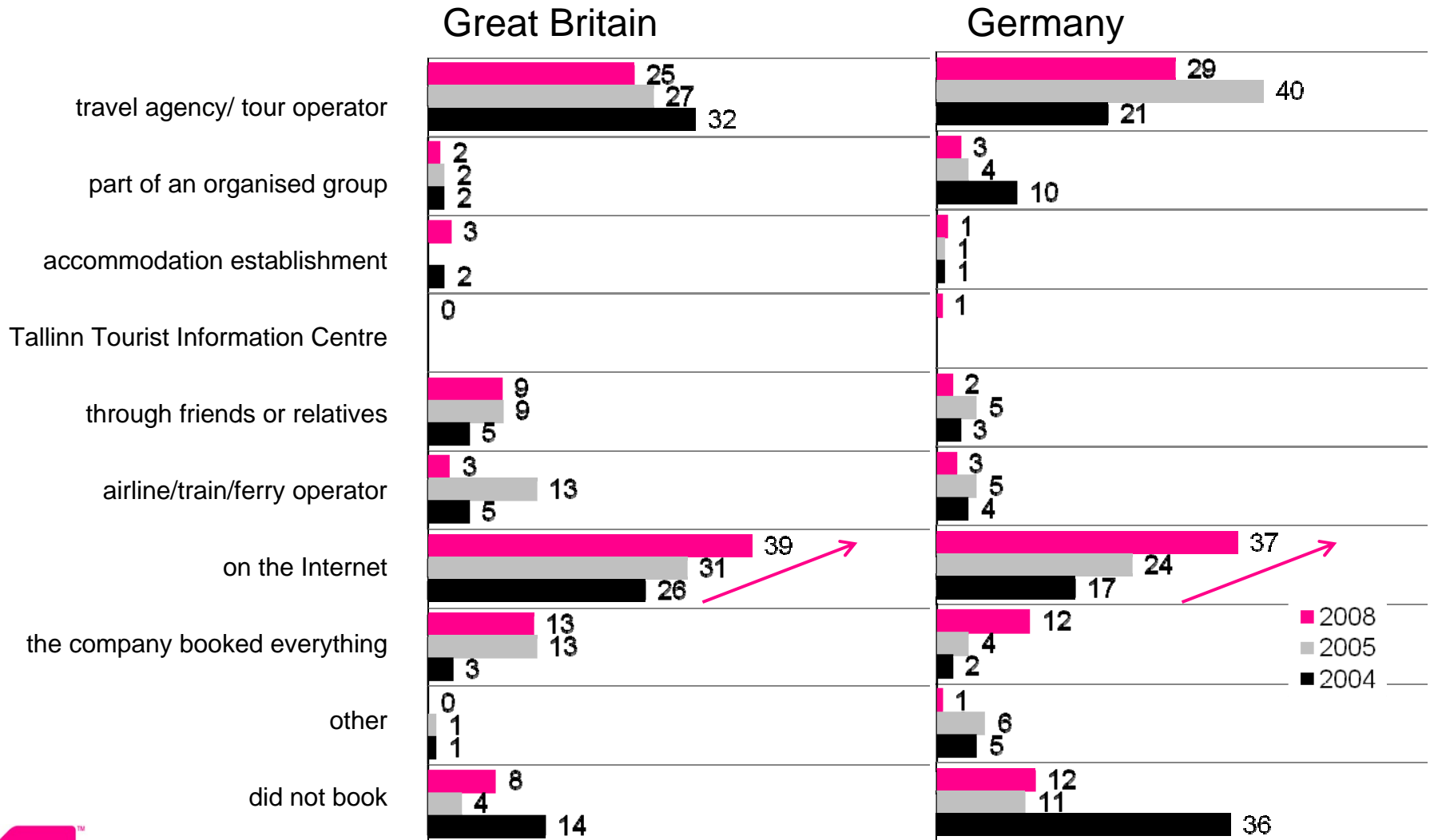
# The time of booking one's accommodation

% 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



# Booking Transportation

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



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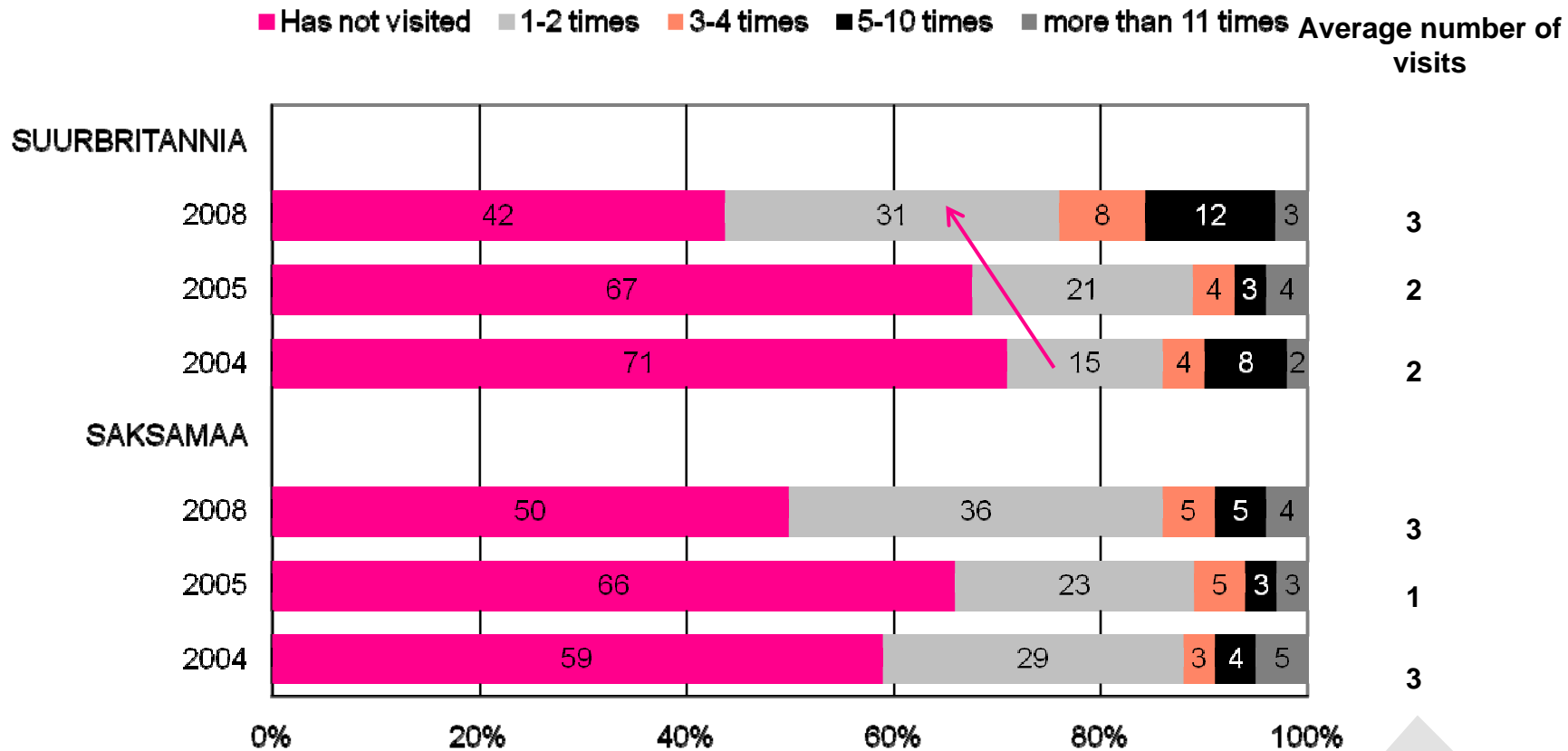
# Tallinn

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# Number of previous visits to Tallinn

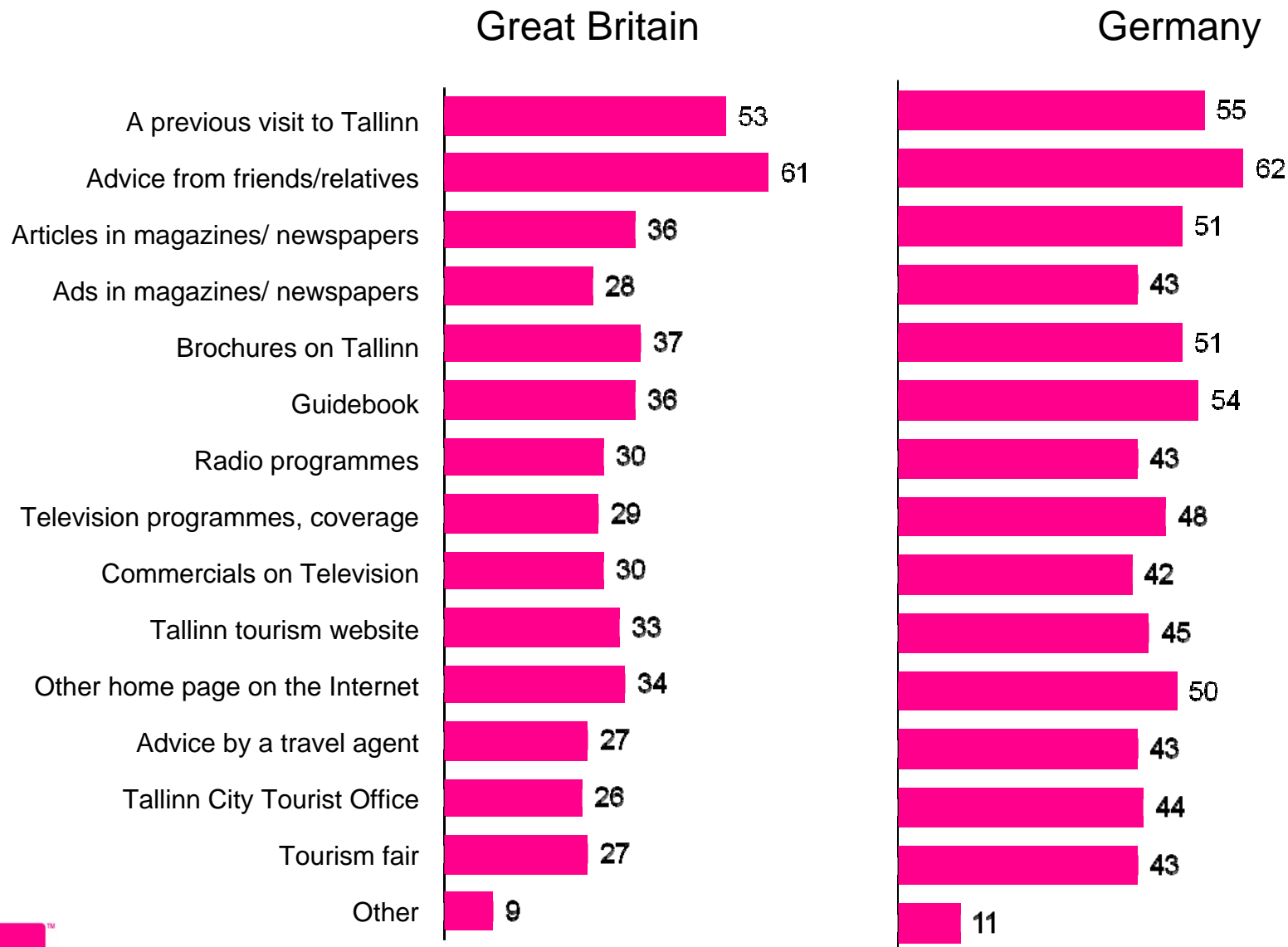
% of all the visitors who have arrived from a particular country



Even though the number is dropping, compared to other countries, most first time visitors come from Great Britain and Germany.

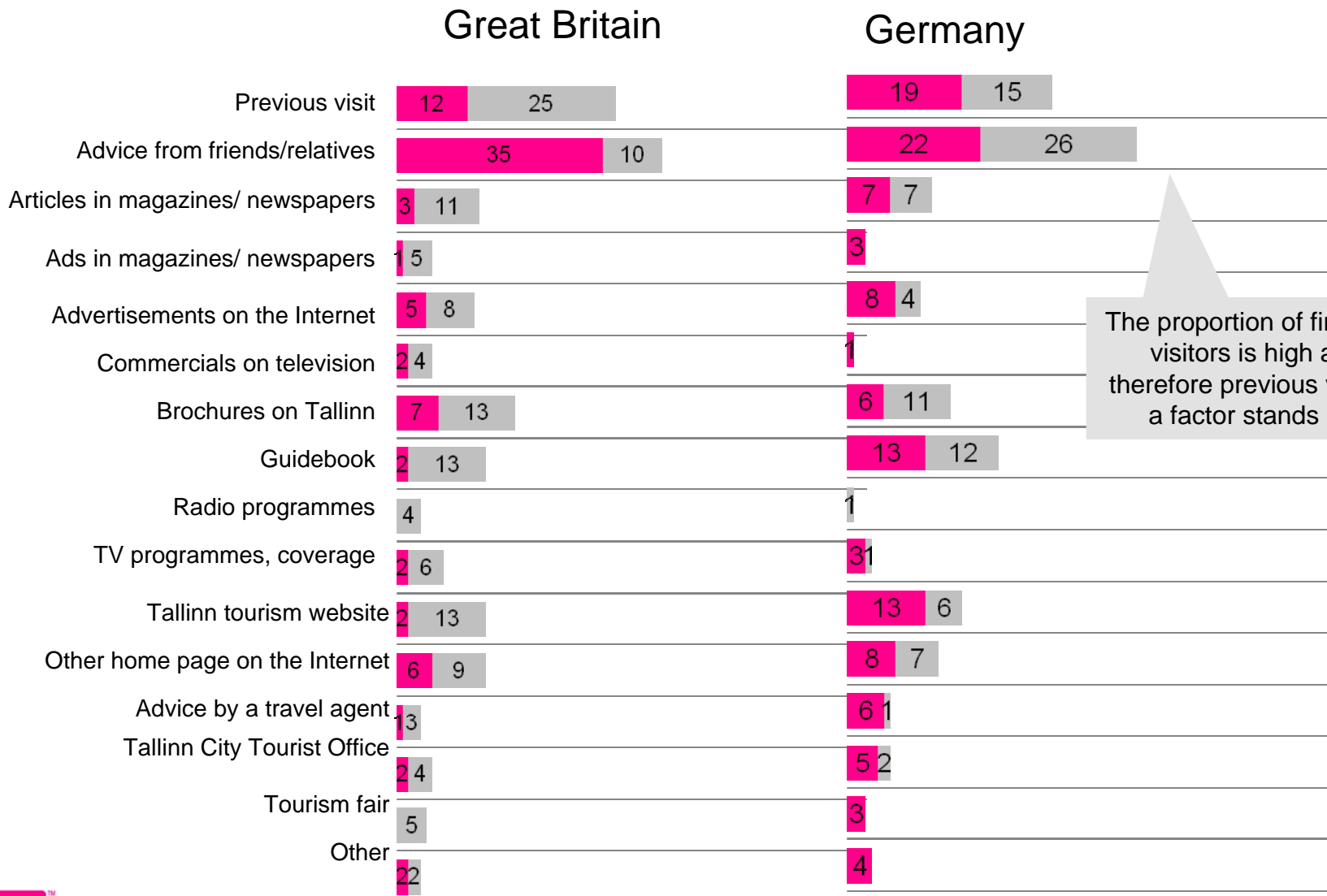
# Information sources about Tallinn

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



# The Factors that Influence Visiting Tallinn

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



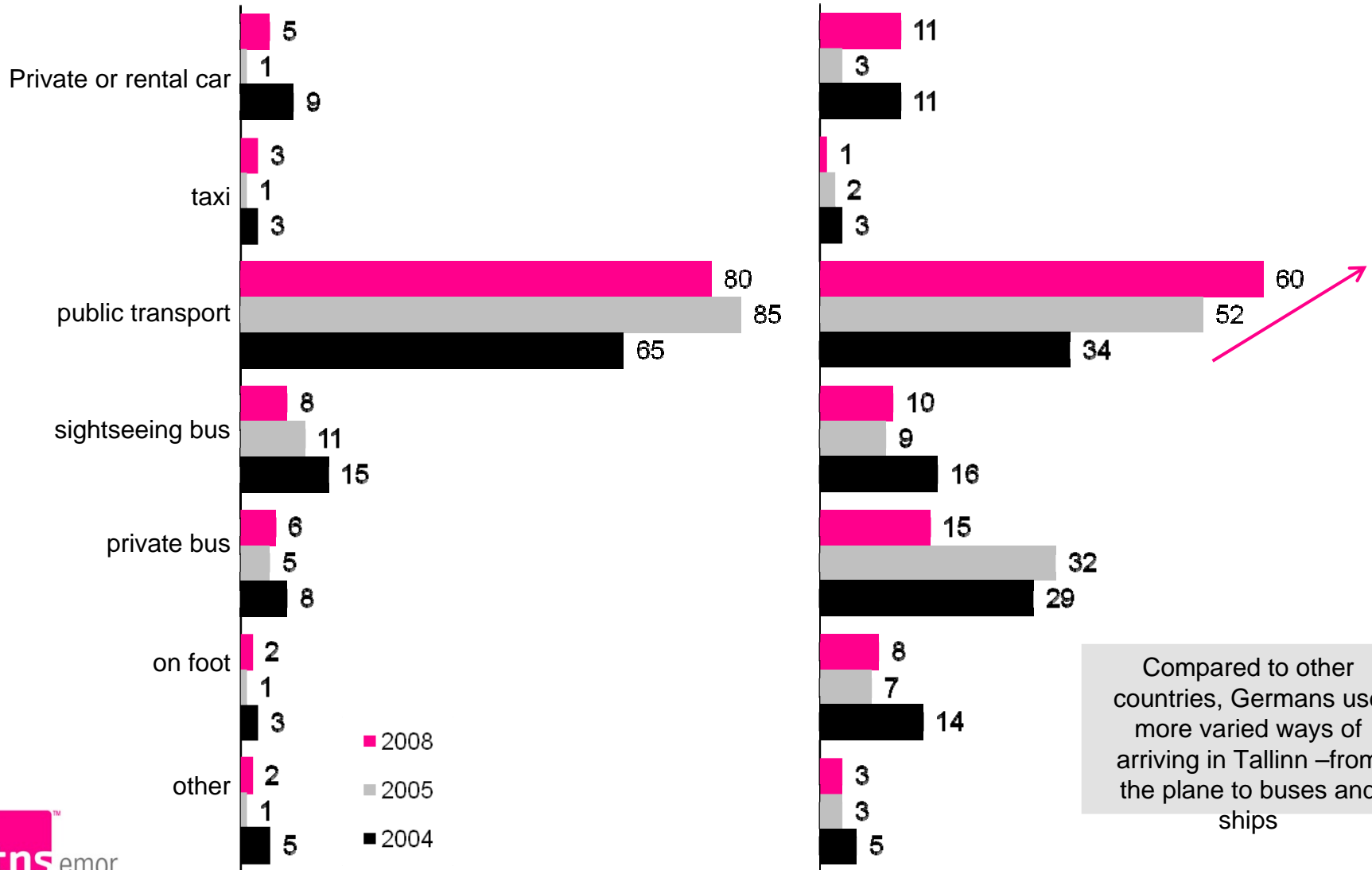
The proportion of first time visitors is high and therefore previous visit as a factor stands low

# Transport used to arrive in Tallinn

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

## Great Britain

## Germany

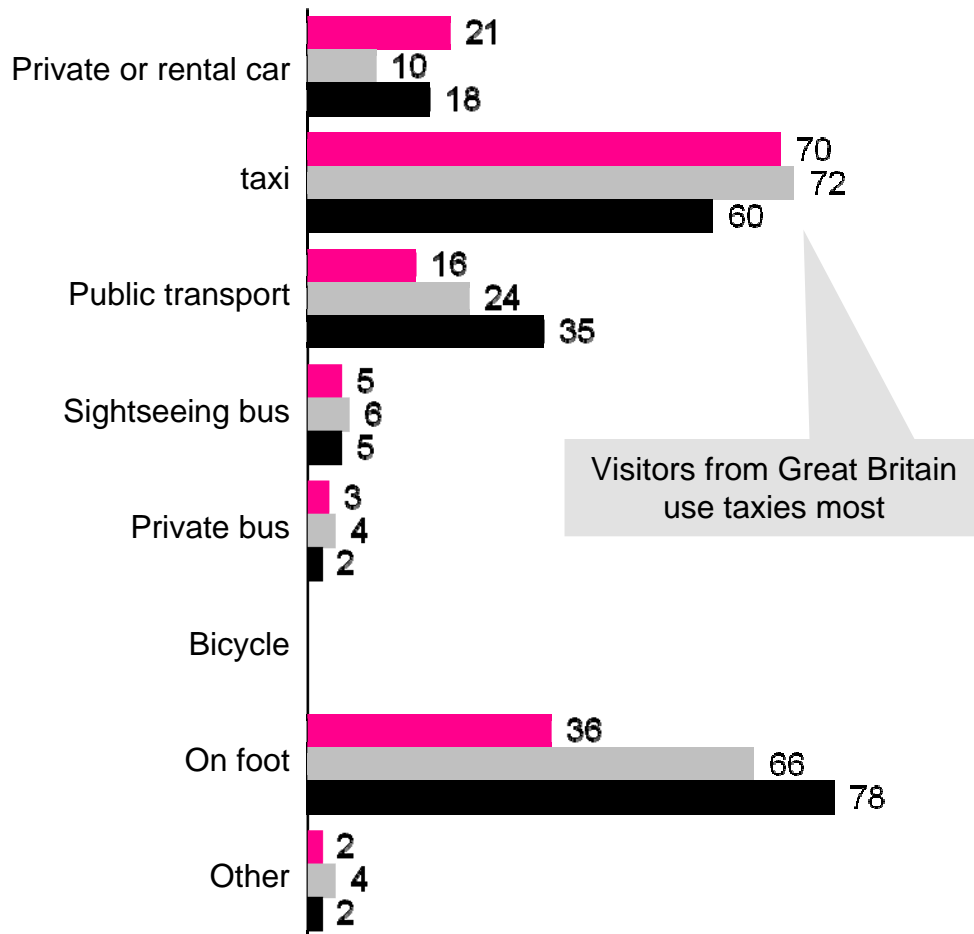


Compared to other countries, Germans use more varied ways of arriving in Tallinn –from the plane to buses and ships

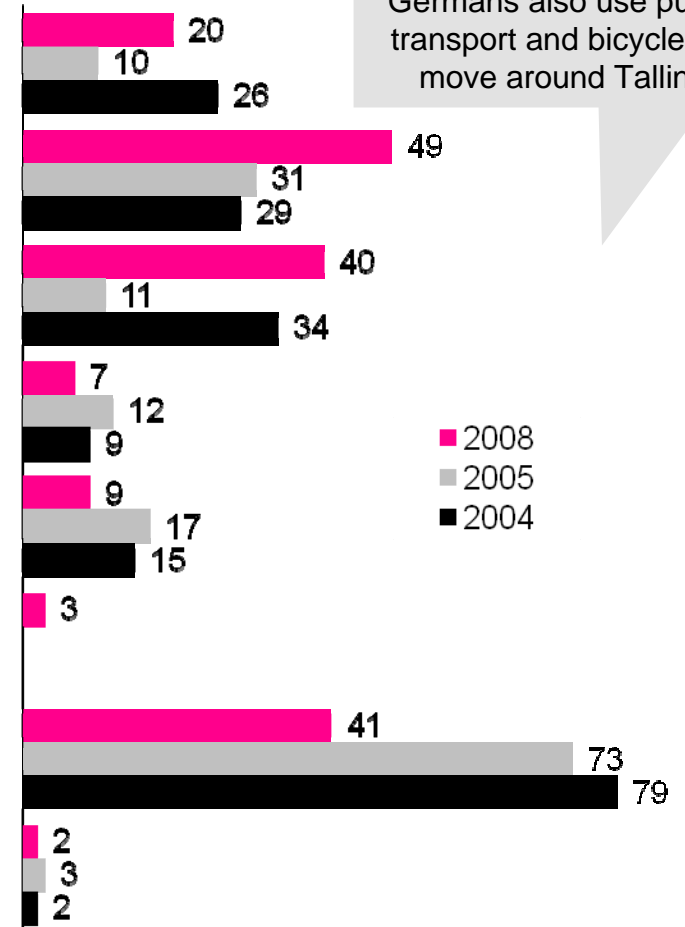
# The Transportation Used in Tallinn

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

## Great Britain



## Germany



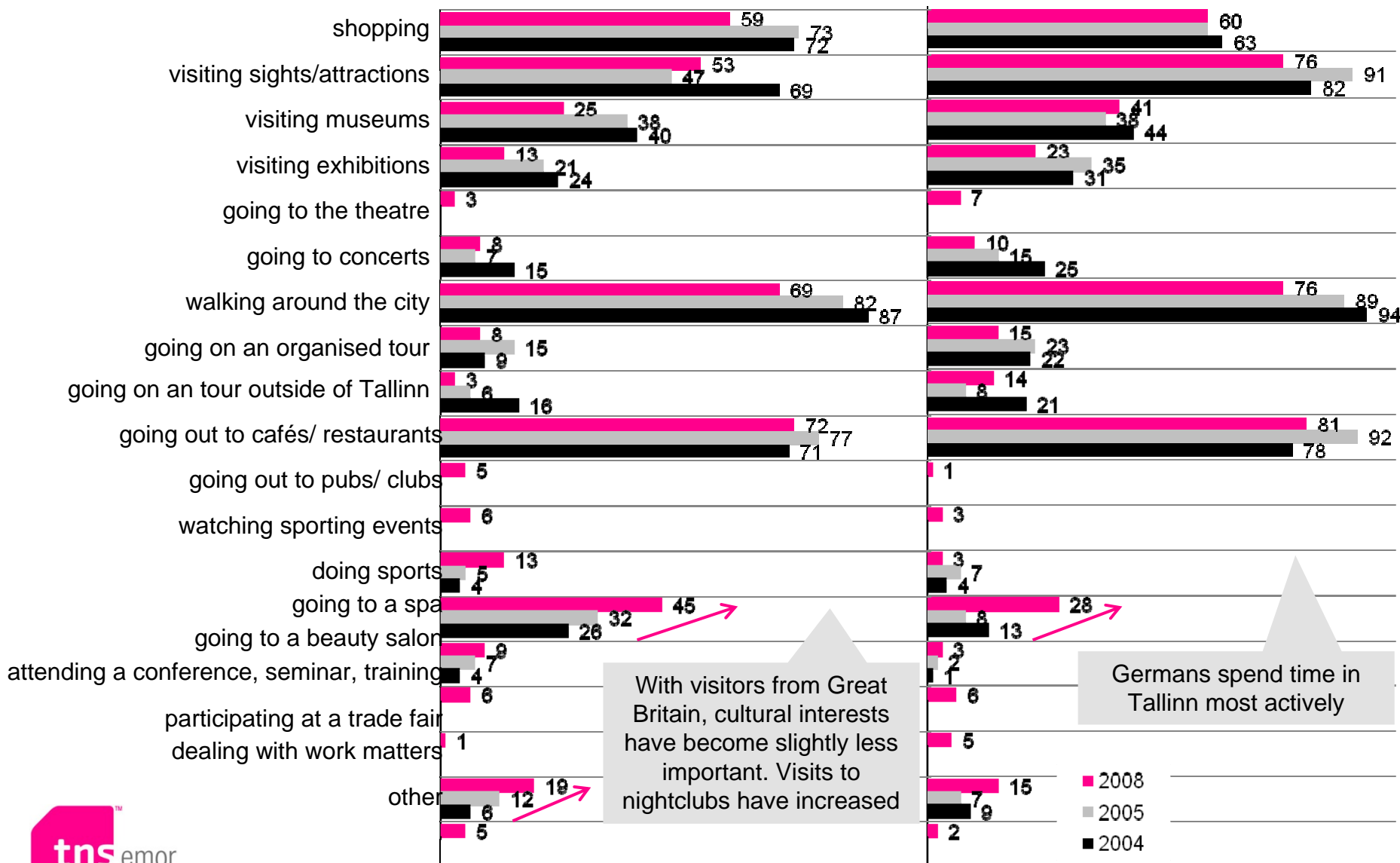
In addition to taxis, Germans also use public transport and bicycles to move around Tallinn

# Activities Tallinn

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

## Great Britain

## Germany

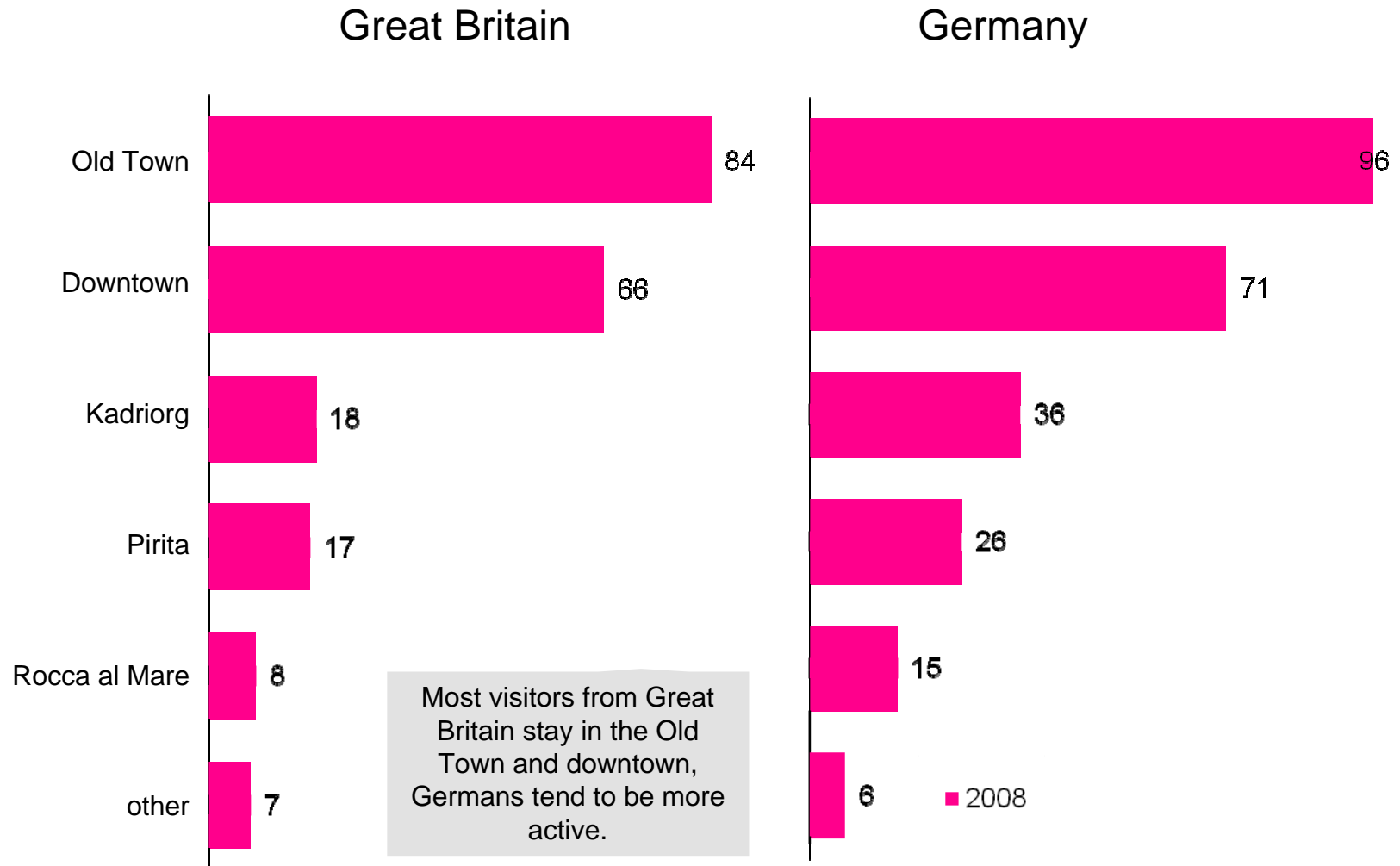


With visitors from Great Britain, cultural interests have become slightly less important. Visits to nightclubs have increased

Germans spend time in Tallinn most actively

# Areas visited in Tallinn

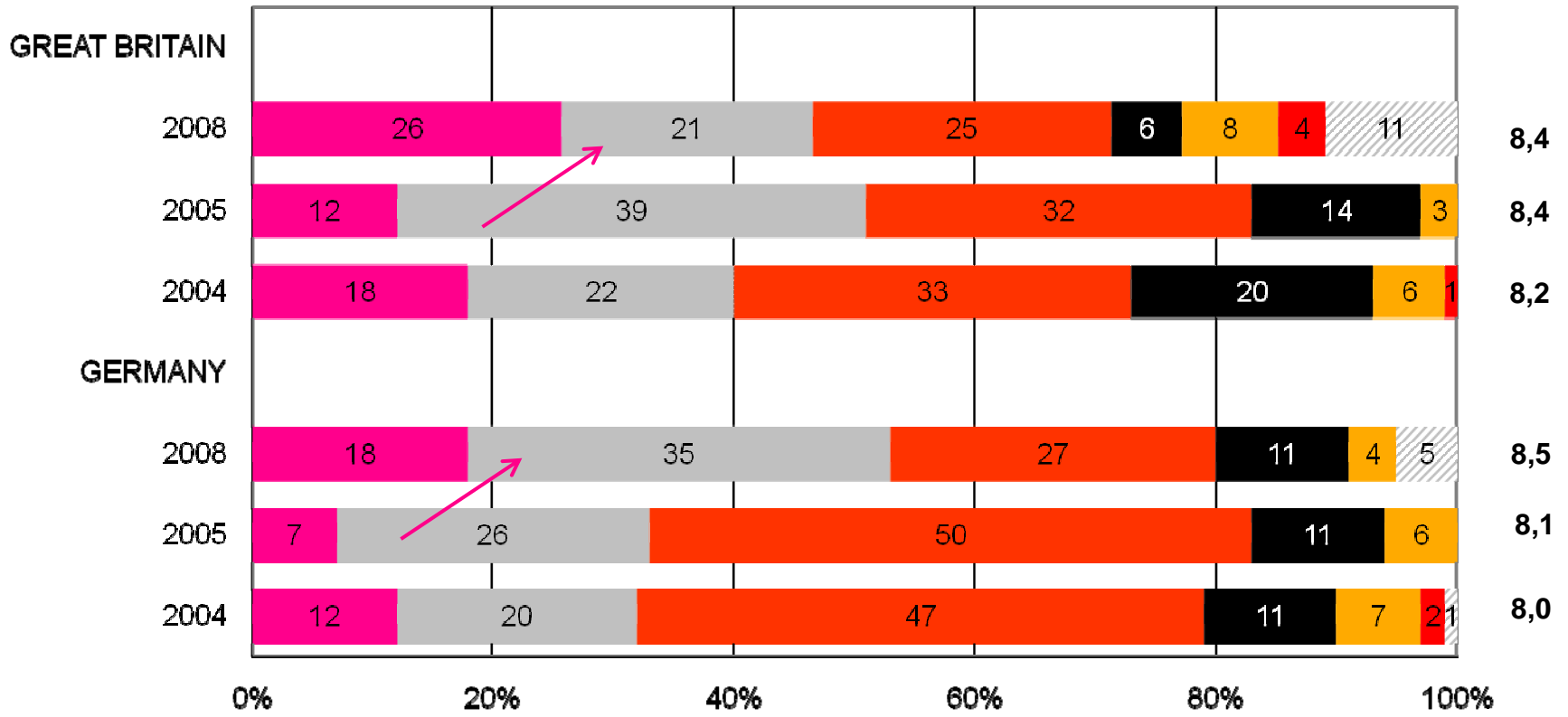
% of all the visitors who have arrived from a particular country



# Evaluation of Overall impression of Tallinn Trip

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

■ 10 points- very good      ■ 9 points      ■ 8 points      **Average evaluation**  
■ 7 points      ■ 5-6 points      ■ 1-4 points - very bad



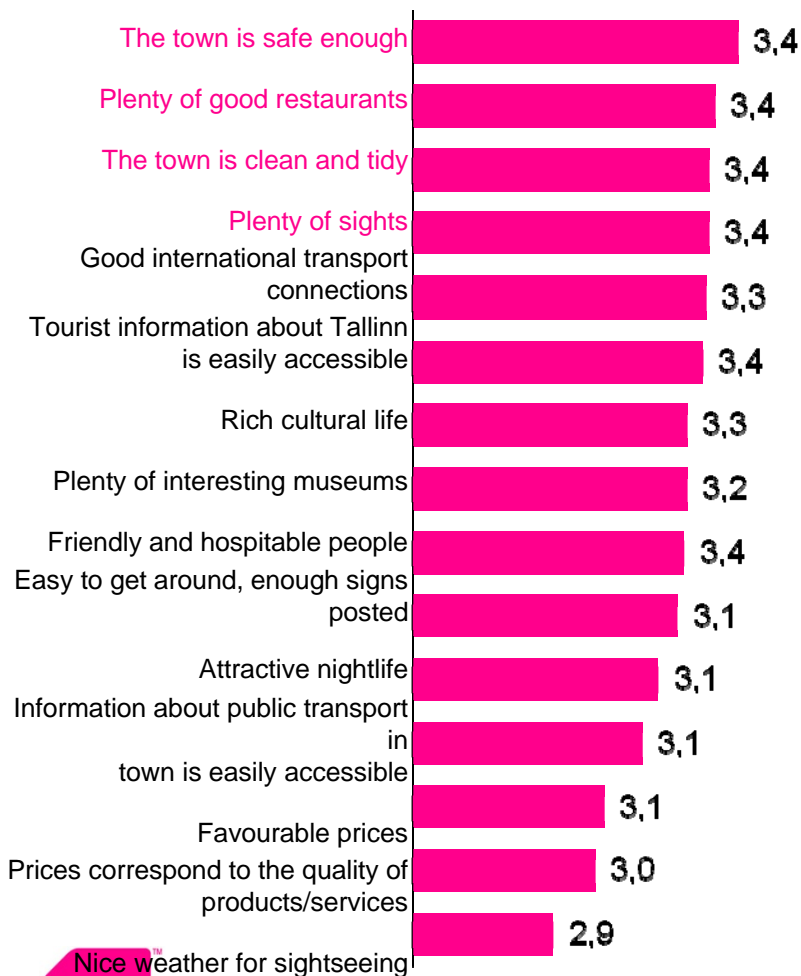
Even though visitors from Great Britain gave the lowest evaluations, their opinion does not differ averagely from visitors of other countries



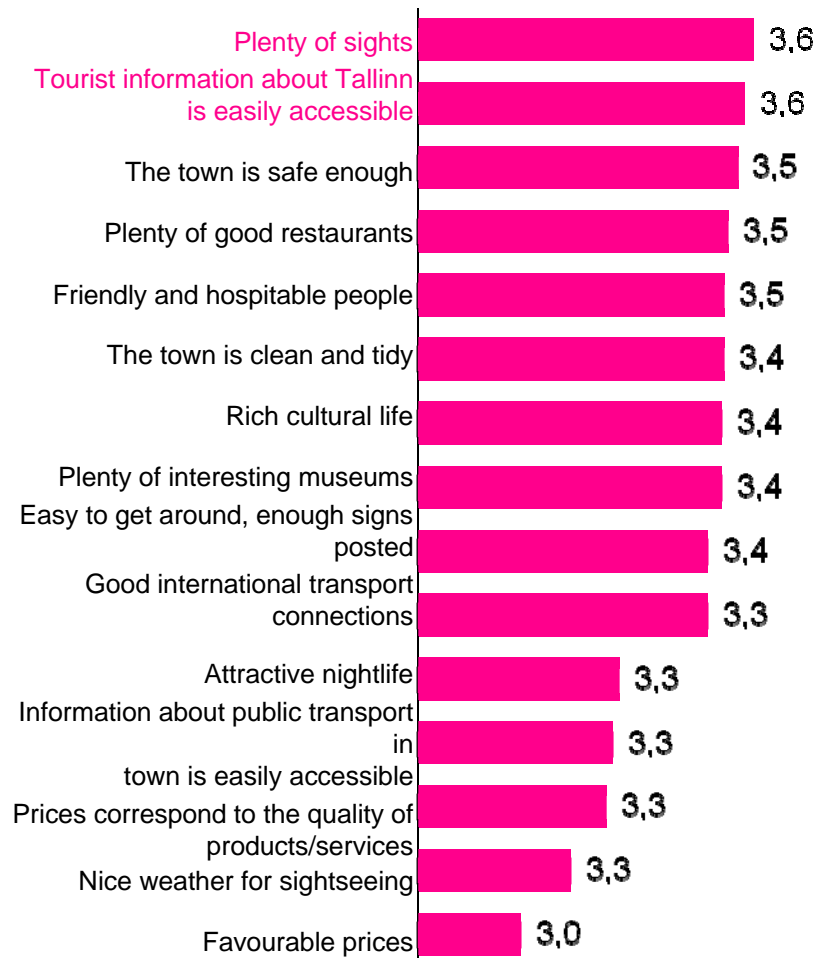
# The Image of Tallinn\*

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

## Great Britain



## Germany



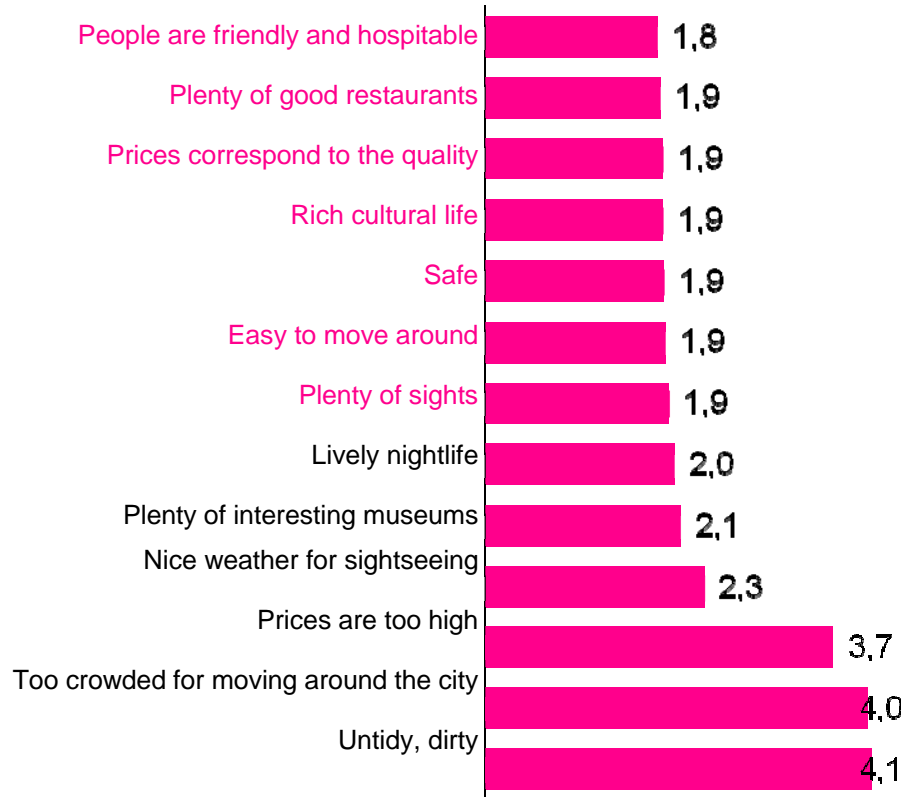
\*In 2008 the division of scale and the names of categories have been changed compared to the previous surveys. The results for 2004 and 2005 are presented in the next slides.

# The image of Tallinn

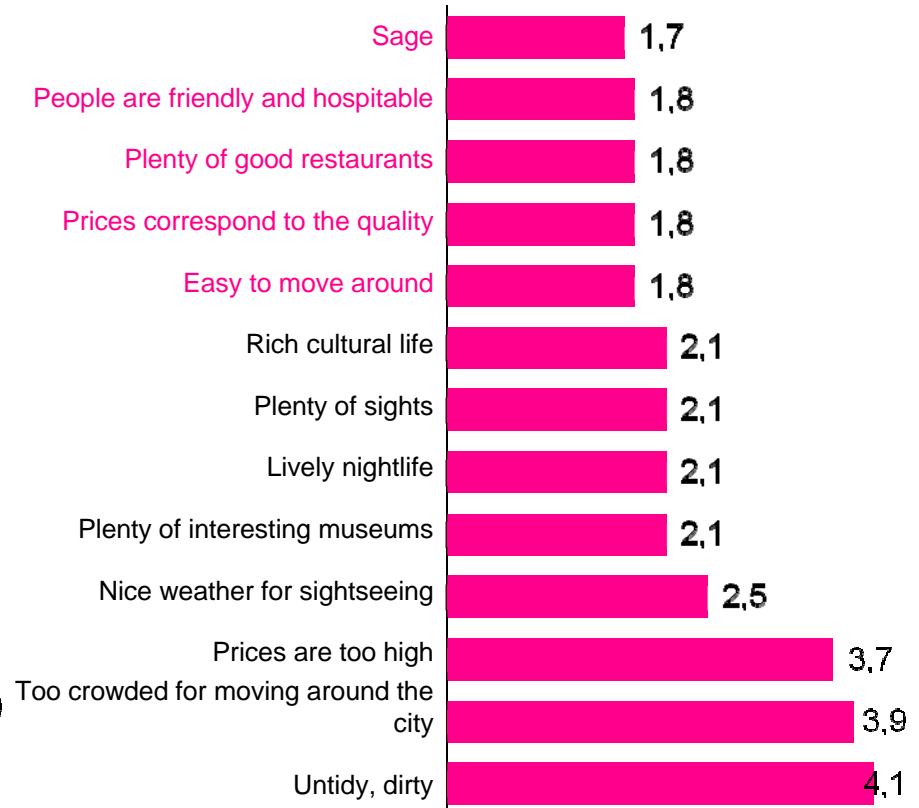
Average evaluation on 5-point scale where 5 is minimum and 1 is maximum evaluation

## Great Britain

2005



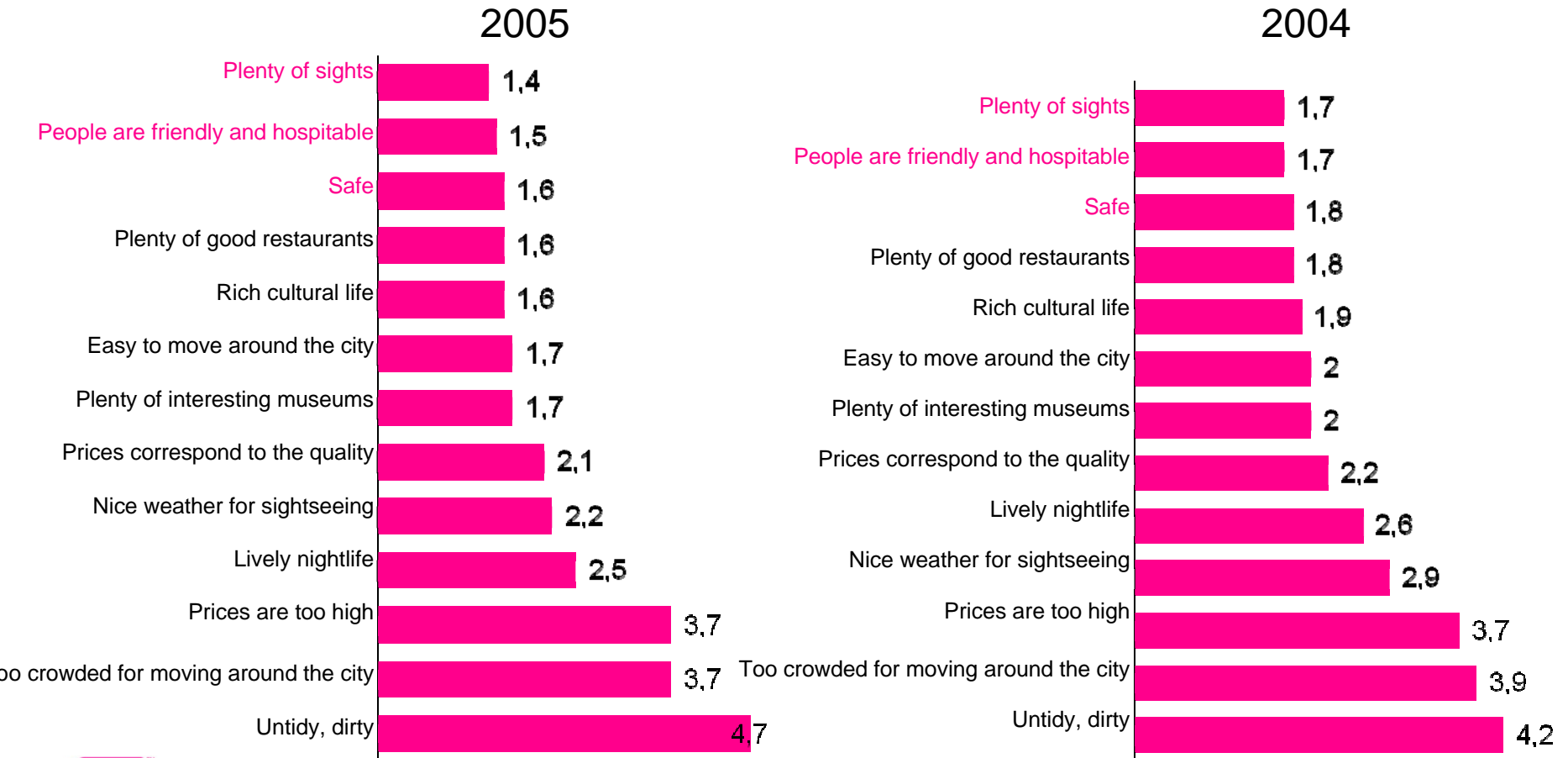
2004



# The image of Tallinn

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

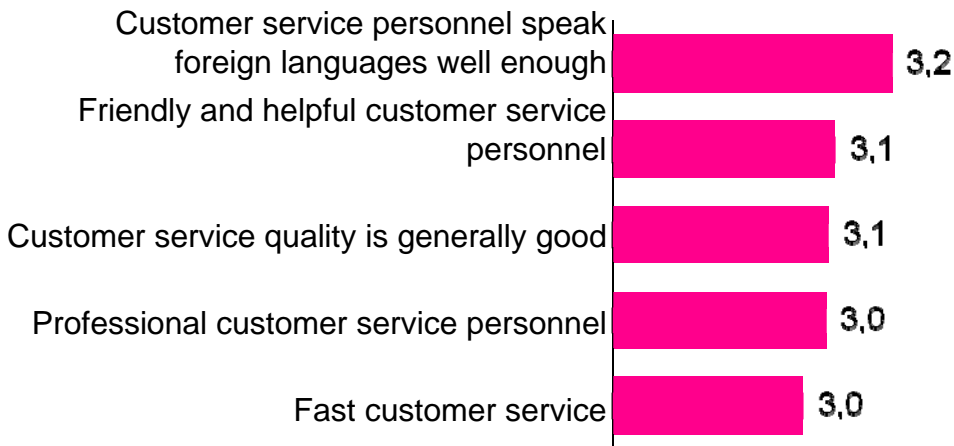
## Germany



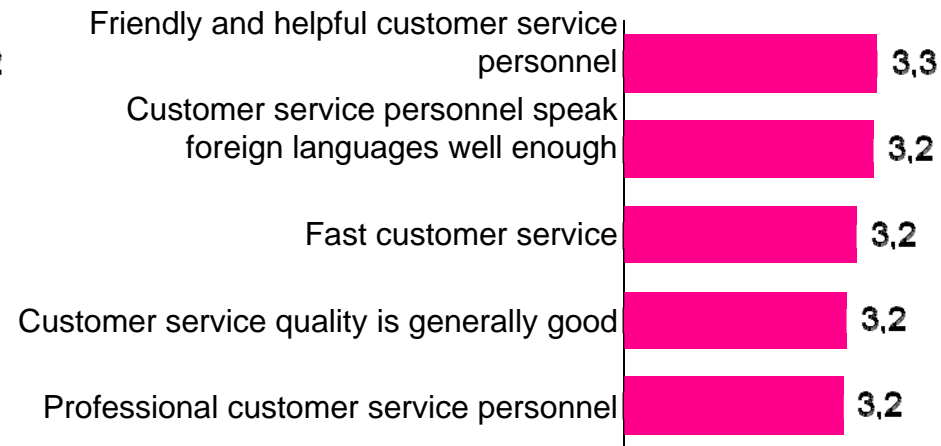
# Tallinn customer service culture\*

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

## Great Britain



## Germany



\* 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.

## Great Britain

Old town

Restaurants, bars, eateries

Positive experience with Estonians

Shops, shopping centres

Hotels

Town Hall Square, its surroundings

Arts centre, museums

## Germany

Old town

Restaurants, bars, eateries

Positive experience with Estonians

Shops, shopping centres

Hotels

Town Hall Square, its surroundings

Arts centre, museums

The sea, nature, parks

# 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.*

## Great Britain

Language problems  
Unfriendly customer service personnel  
Cold or bad weather  
Dirty or slippery streets  
Not enough toilets in the streets  
Expensive public transportation  
Hotels

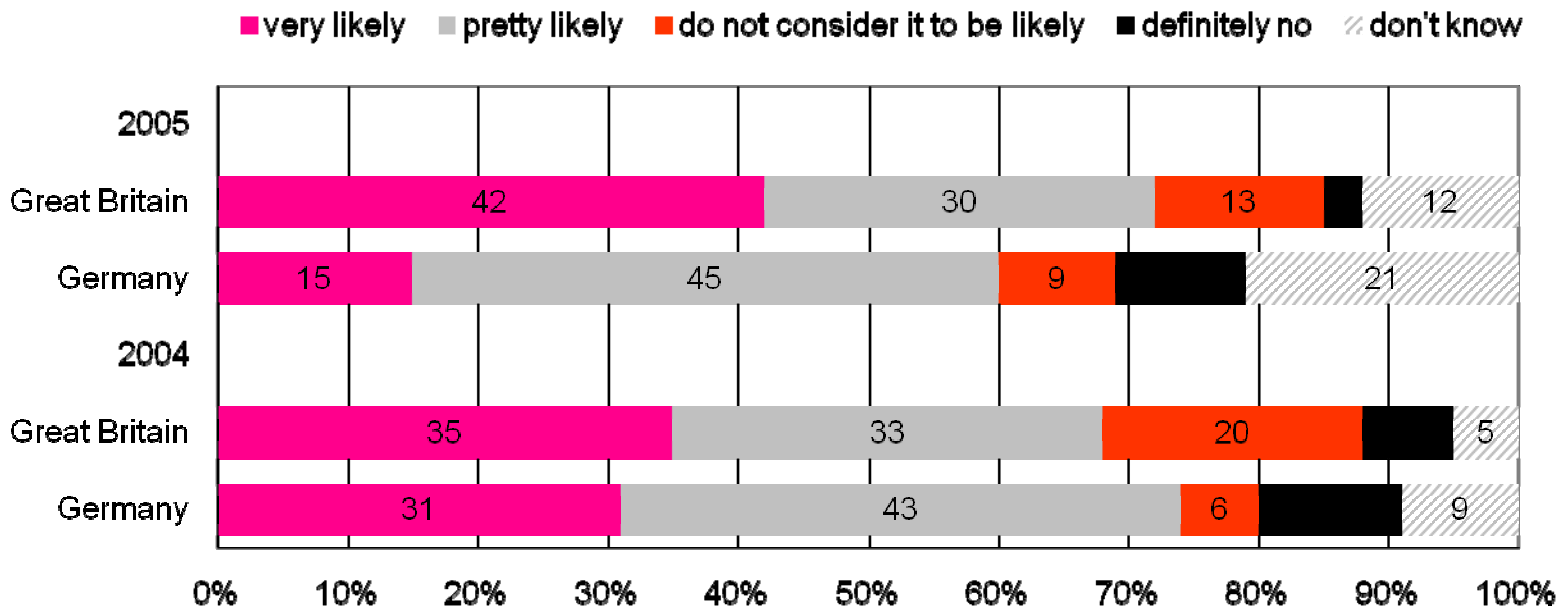
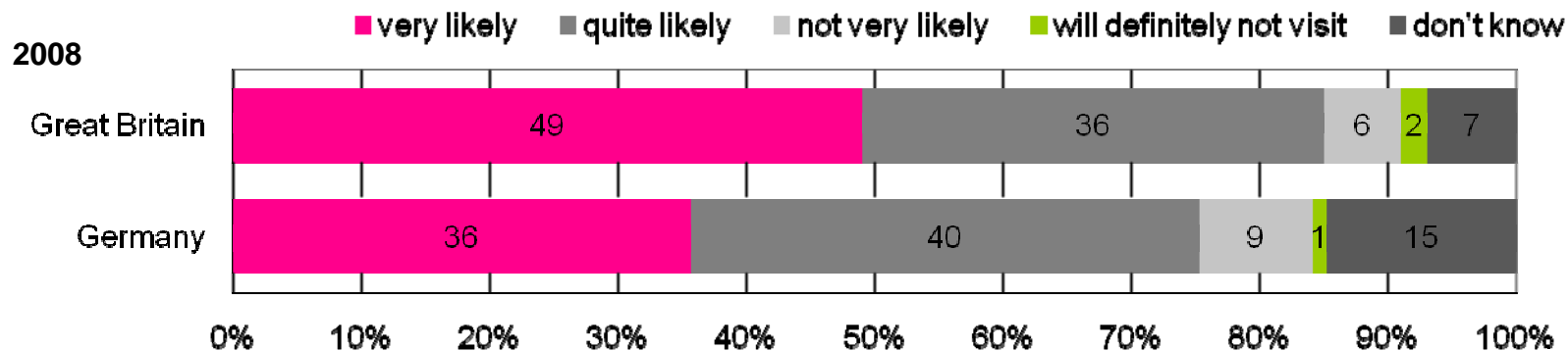
## Germany

Language problems  
Unfriendly customer service personnel  
Cold or bad weather  
Dirty or slippery streets  
Not enough toilets in the streets  
Expensive public transportation  
Hotels  
Negative experience with Estonians  
Bad traffic

# Likelihood of visiting Tallinn again

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

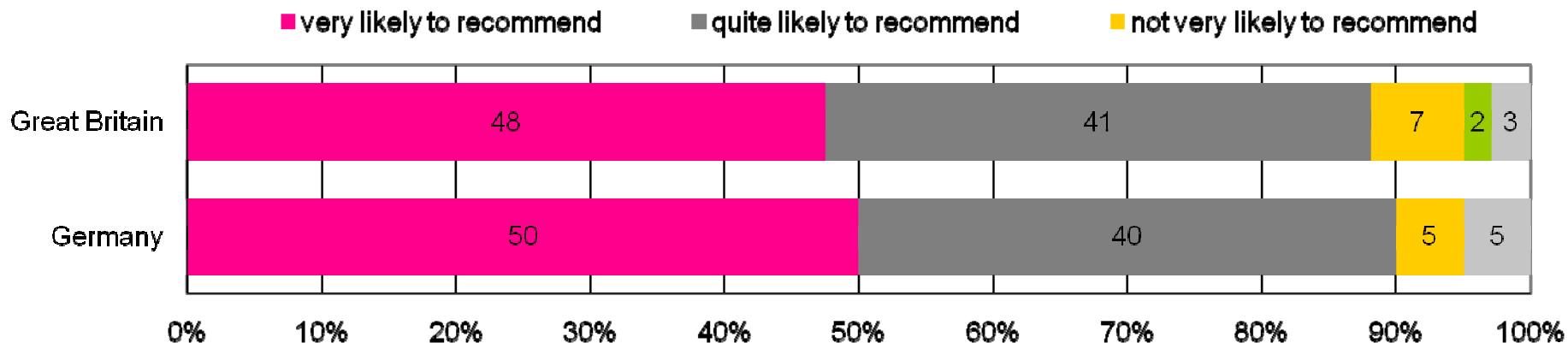
How likely are you to visit Tallinn again during the next 5 years? \*



# Recommendation communication

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

2008



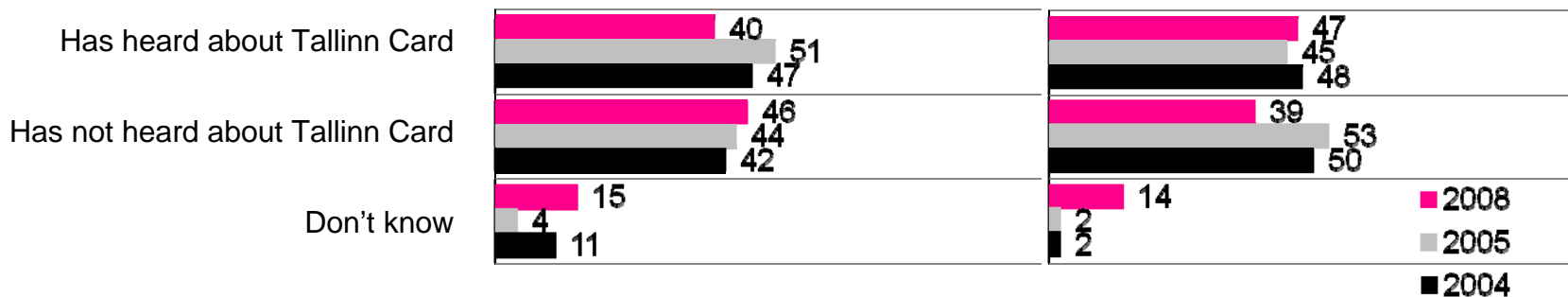
The visitors from Great Britain are critical here as well: 9% of them would not recommend Tallinn as a holiday destination

# Information about Tallinn Card

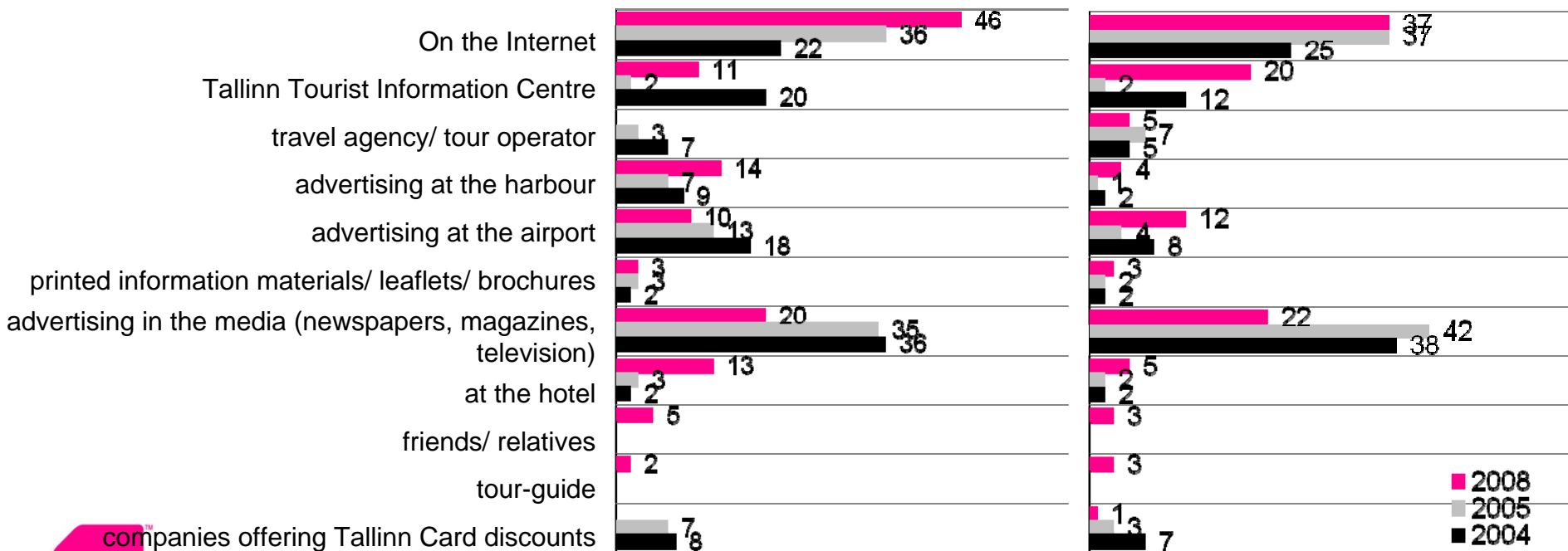
% of all the visitors who have arrived from a particular country

## Great Britain

## Germany

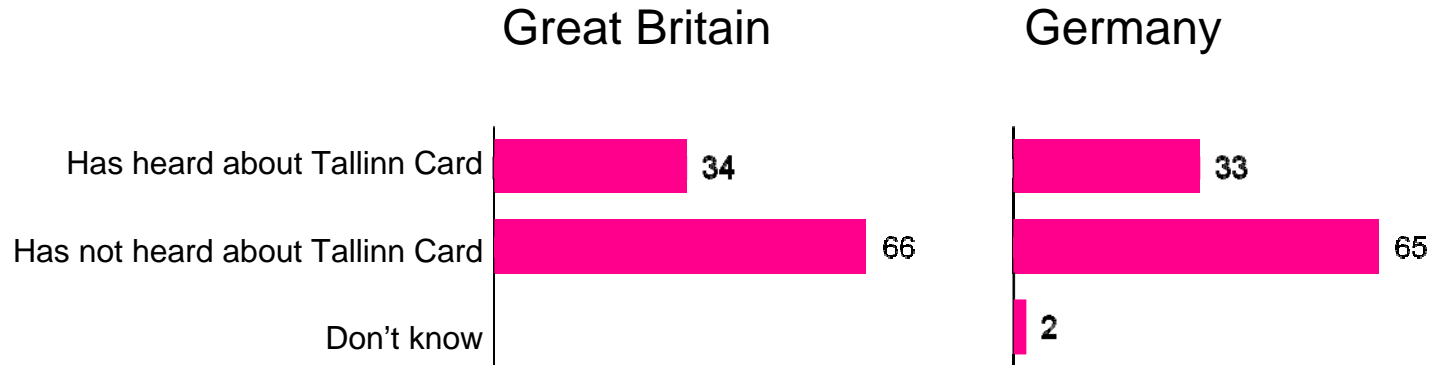


% of all the visitors who have heard about Tallinn Card



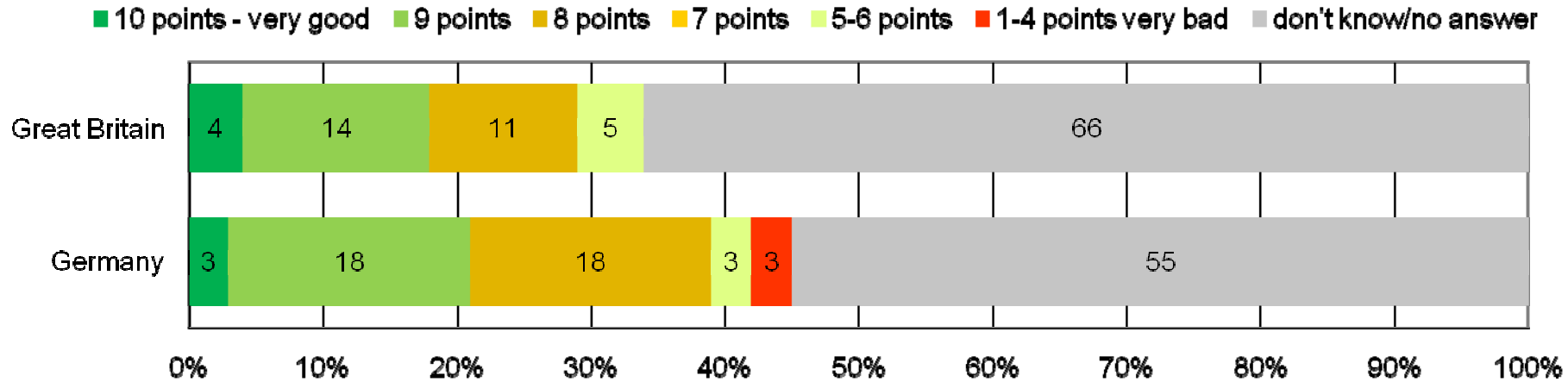
# The Usage of Tallinn Card

% of all the visitors who have heard about Tallinn Card (Great Britain 40%, Germany 47%)



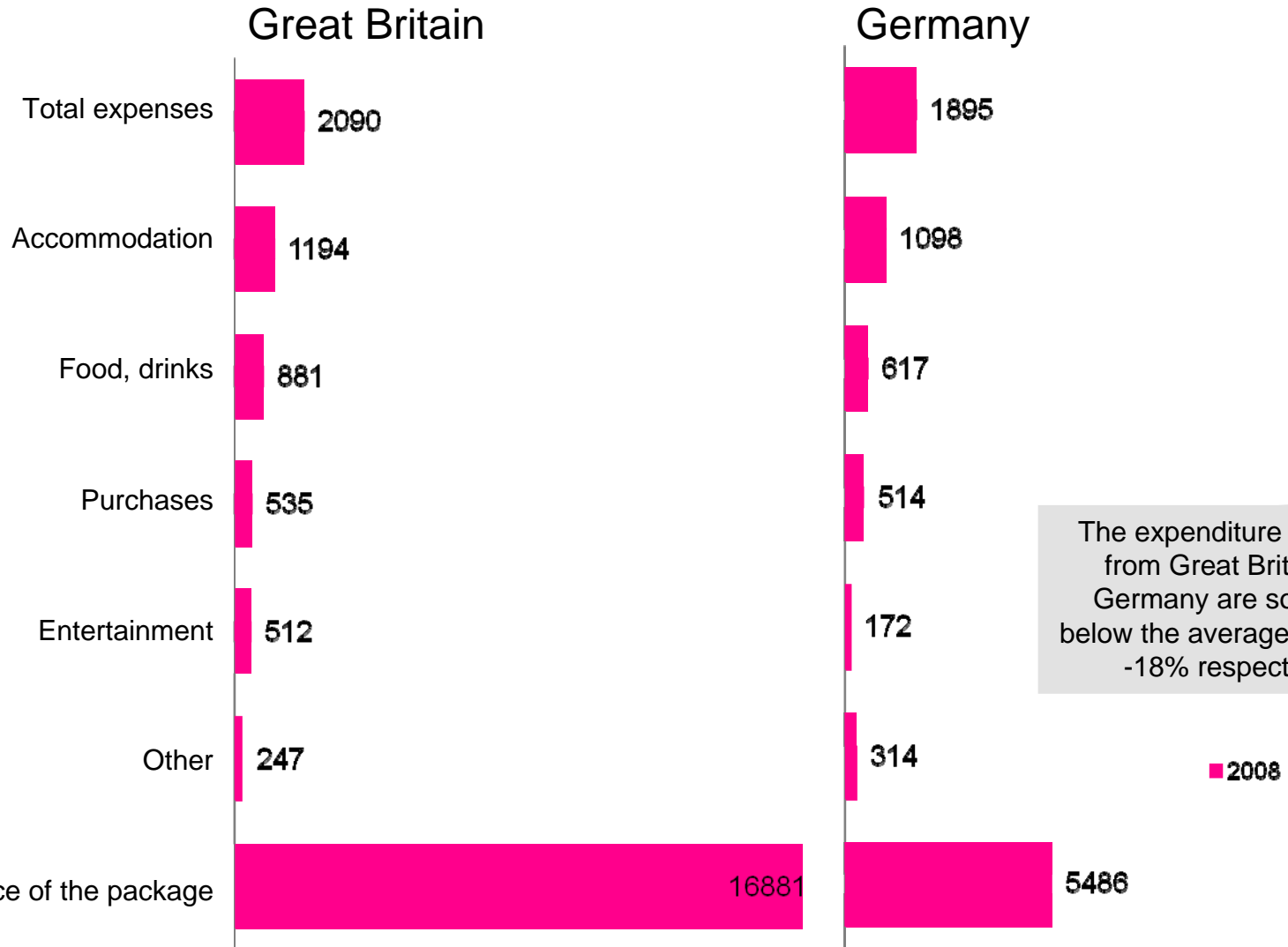
# Opinion about Tallinn Card

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



# Average expenditure per person per day

Average expenditures per person



The expenditure of visitors from Great Britain and Germany are somewhat below the average (-10% and -18% respectively).

■ 2008

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# Summary

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# German foreign visitors

## 5%\* of all Tallinn foreign visitors

- There was **131 000 foreign visitors** from Germany, which is slightly more than the number in previous surveys (115 000 in 2005).
- Compared to earlier years, visitors from Germany include **more young people, students, but also middle aged and less older/pensioners**. The proportion of men has increased (55% in 2005 vs 66% in 2008).
- Compared to other nationalities, Germans also visit other destinations. However, the proportion of those, for whom Tallinn is the only destination, is increasing (39% in 2005 vs 43% in 2008). It mostly involves **holidays**, but the proportion of **business trips has also increased substantially**.
- All Germans also stay overnight in Tallinn and, compared to other countries, spend here **the longest (7-8 nights)**. The most popular type of accommodation is a **mid-range hotel**, however, compared to visitors from other countries, German visitors also spend the night in caravans and tents. Booking the accommodation via **internet is an increasing trend**. Compared to other countries, Germans tend to book accommodation with longest notice, however, this is a falling trend over the past years and in more than half of the cases accommodation is booked up to 1 month in advance.
- Half (50%) of the visitors from Germany are in Estonia for the first time, as a result of which the average number of visits is relatively low (3). However, compared to the last survey (2005), there are substantially less first time visitors (66%). Unofficial sourced of information (articles, brochures) are mostly used by German visitors to gain information on Tallinn. Various **internet sites** are also popular to search information.
- Germans spend time in **Tallinn most actively** and engage in different cultural activities, sightseeing, shopping and walking. The increase in the number of younger visitors to Tallinn has brought about **more frequent visits to nightclubs**. The general impression about Tallinn is high among Germans, but the average has remained unchanged at the 2005 level. Most Germans are prepared to return to Tallinn and recommend the city to their friends and relatives.

# Great Britain foreign visitors

## 4%\* of all Tallinn foreign visitors

- In 2008, about **114 thousand\*** foreign visitors came to Tallinn from Great Britain. This number stands higher than in the previous survey period (ca 86 thousand in 2005).
- Regarding the social-demographic structure of visitors from Great Britain, those aged between **25-34** prevail. Their number in Tallinn is also greater than previous years. Also, compared to previous years, there are more of those who **are employed as managers and office staff and less skilled and other workers**.
- Half (54%) of the visitors are on a holiday, however, the number of those who **visit friends and relatives or are on a business trip has also increased**. A trip to Tallinn is primarily a pleasant change, but the number of those who consider it the second most important holiday has also increased (10% in 2005 vs 21% in 2008).
- All visitors spend at least one night in Tallinn (3 night on average) and the number of those British who spend the night in a **luxury hotel, has gone up substantially** (21% in 2005 vs 32% in 2008). Accommodation is mainly booked in the **internet** and the length of notice is becoming shorter (42% on average book 1 month in advance).
- **The number of first time visitors has decreased** (67% in 2005 vs 42% in 2008), although it is still quite high compared to our neighbouring countries. The sources of information and influencing factors which play an above average role are various **official channels** (brochures, travel guides, articles, etc) .
- In Tallinn, visitors from Great Britain engage in all the activities inherent to tourists – a walk in the city, visiting sights and cafes. **Nevertheless, visits to nightclubs** have increased substantially. **Cultural interests have somewhat subsided**, which can be explained by the increased proportion of younger visitors. Most visitors from Great Britain remain in the Old Town and downtown..
- Generally, Tallinn is viewed **positively**, and the proportion of those providing maximum evaluations has increased. However, compared to other countries, mainly the visitors from Great Britain (4%) provide the minimum evaluation to their general impression of Tallinn .
  - **Most visitors from Great Britain say that they would come again to Tallinn** and would recommend Tallinn to their friends.

However, the number of those who are critical is also the highest here.