

Overview of tourism trends in Tallinn in the first half of 2021

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Key Indicators 2021, January - June 2021



Visits of foreign residents
145 600 (-78%)

58% multi-day visits
42% one-day visits



Foreign Visitor
Spending

Total 70 mill. €,
per visitor per day was
190 euros



Accommodation
establishments: 109 (-9%)
Rooms: 7114 (-13%)
Beds: 14 930 (-14%)
Room occupancy rate: 23%
Bed occupancy rate: 15%
Average cost of a guest night, 30€
(-11%)



Accommodated tourists

Total: 168 787 (-46%)
Estonia : 108 498 (+58%)
Foreign: 60 289 (-75%)
Finland: 12 223 (-88%)
Latvia: 6 693 (-52%)
Germany: 4 797 (-32%)



Foreign countries
(TOP 3)

- Finland: 44 492 (-85%)
- Latvia: 20 261 (-70%)
- Germany: 11 389 (-57%)



Accommodation Sales
11,6 mill. € (-48%)
The average cost for 24
hours was 30 euros (-12%)

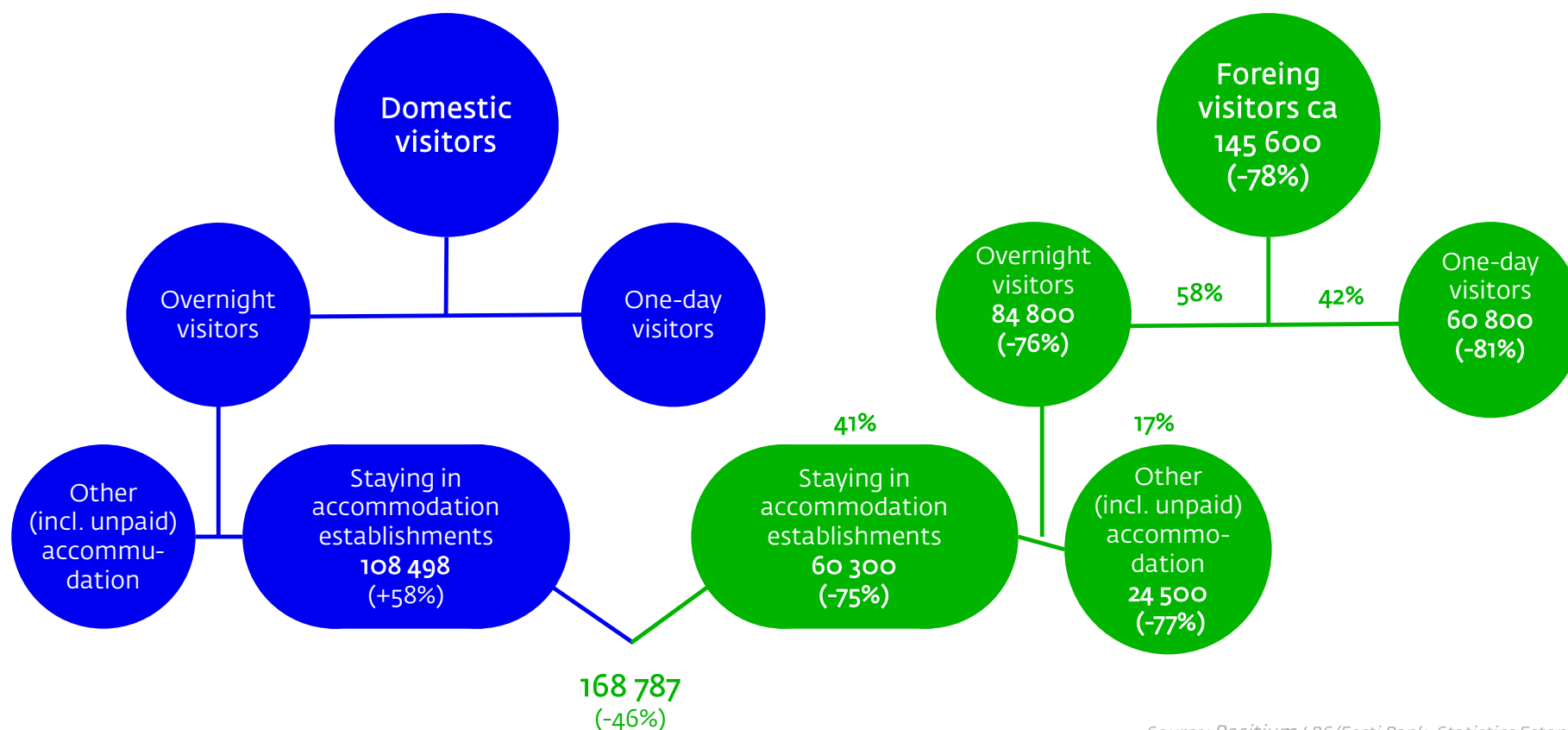
Short-Term Rentals

- Total properties: 1962 (-31%)
- Total capacity: 7300
- Average registered room price (ADR): 56 € (+19%)
- Avg. properties occupancy rate: 48%
- Avg. review score: 4.77/5

Overnight stays

Total: 383 030 ööd (-35%)
Estonia: 203 605 (+67%)
Foreign: 179 425 (-62%)
Germany: 23 575 ööd (+51%)
Finland: 23 318 (-86%)
Latvia: 16 629 (-33%)

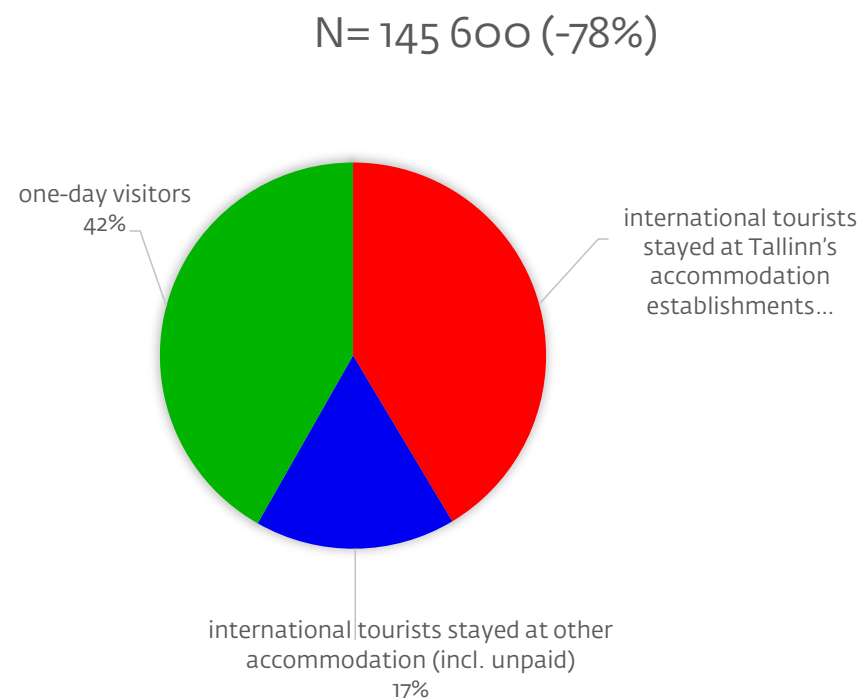
Visitors to Tallinn, January - June 2021



Source: Positium LBS/Eesti Pank, Statistics Estonia

Visits of foreign residents to Tallinn, January - June 2021

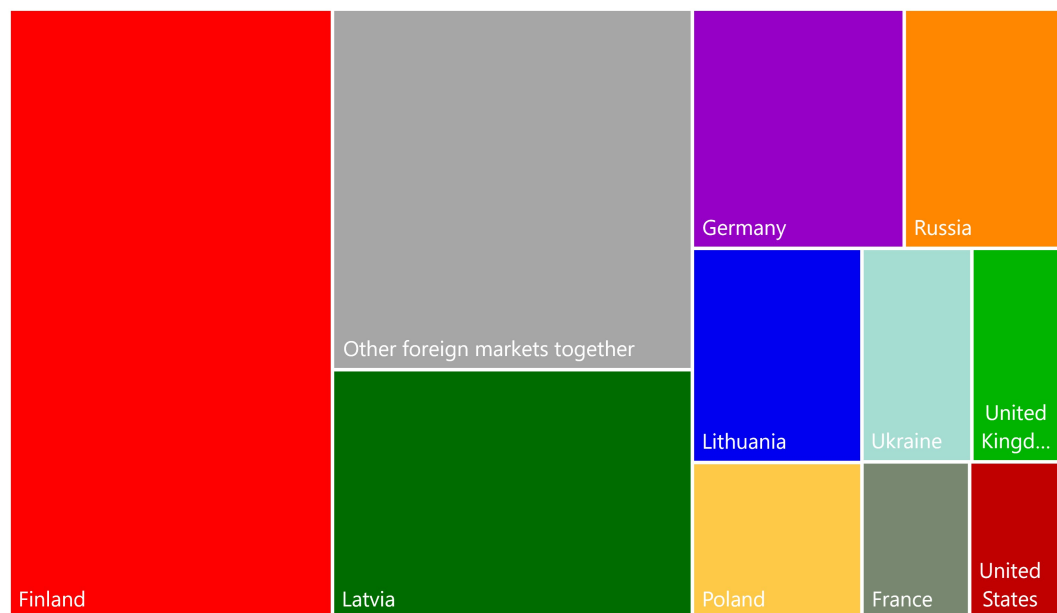
- Residents of foreign countries made 145 600 visits to Tallinn.
- 58 % of foreign travellers (in total 84 800) stayed in Tallinn for several days. Of those, 71% stayed in accommodation establishments in Tallinn and 29% stayed with other accommodation providers or with friends and relatives.
- Multi-day visits had the average duration of 3,64 nights.
- 42% foreign visitors (1.90 million) were same-day visitors.
- Total consumption of these visitors in Tallinn was 70 million euro (or 190 euros per visitor per day).



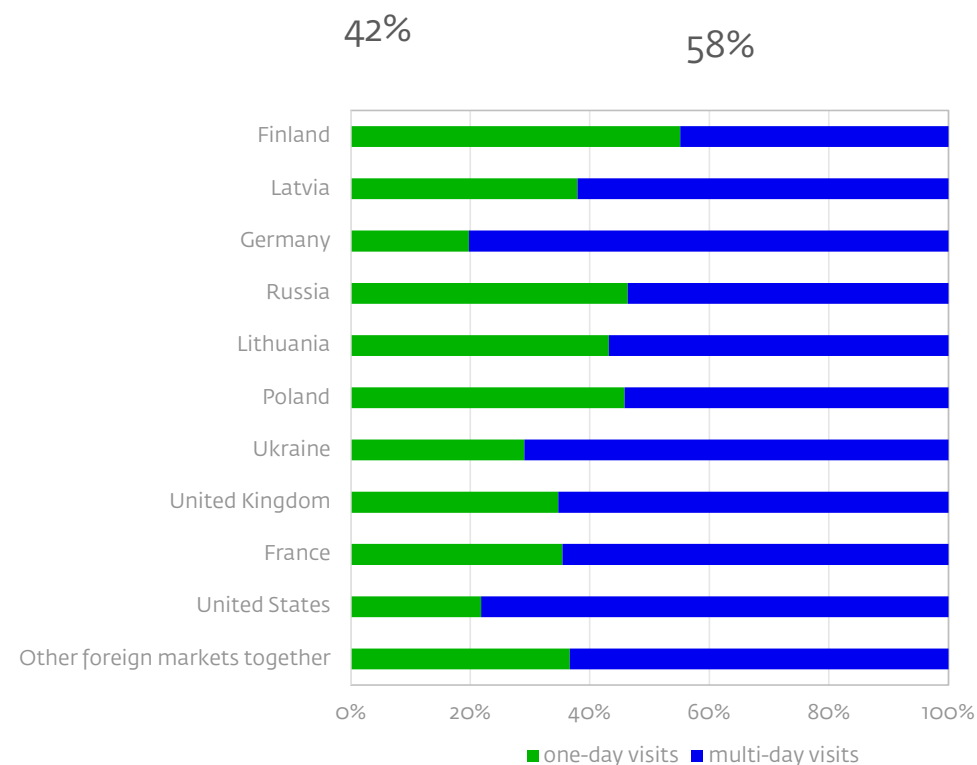
Source: Positium LBS/Bank of Estonia, Statistics Estonia

Visits of foreign residents to Tallinn by country, January - June 2021

N= 145 600 visits (-78%)



Source: Positium LBS/Bank of Estonia



Tourism trends in Tallinn 2021 (Q1-Q2/2021)

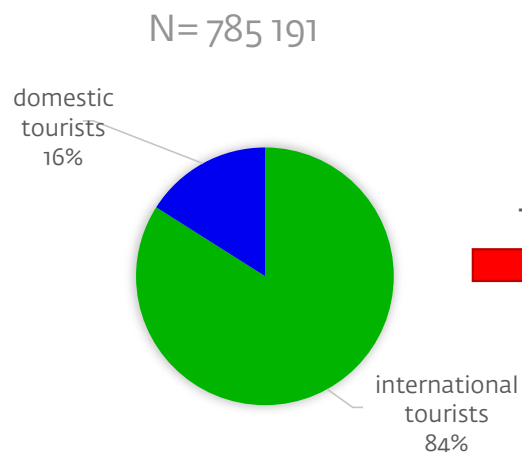
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Accommodated tourists and overnight stays, January – June 2021

- According to Statistics Estonia, **168 800** stayed in accommodation establishments in Tallinn (-46 %*)
- Incl.:
 - international tourists: 60 289 (-75%)
 - domestic tourists: 108 498 (+58%)
- Tourists spent **383 030 nights** in Tallinn's accommodation establishments (-35%).
 - Incl.:
 - overnight stays by international tourists: 179 425 (-62%)
 - overnight stays by domestic tourists: 203 605 (+67%)
- The average length of the trip was **2,27 nights** (+7%).
 - International tourists spent an average of 2,98 nights (+30%)
 - Domestic tourists spent an average of 1.88 nights (0%)

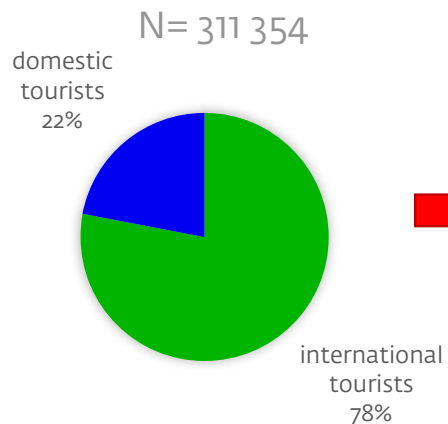
* compared to the same period last year

2019 (IQ+IIQ)



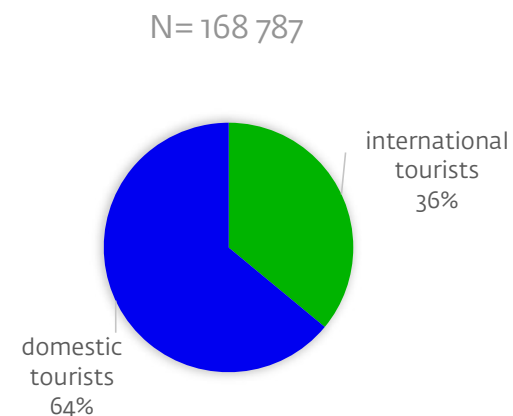
-60%

2020 (IQ+IIQ)

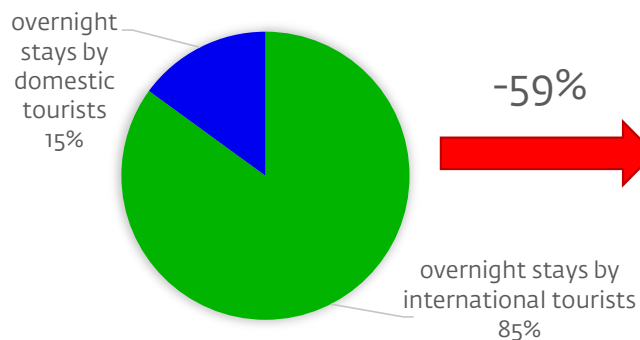


-46%

2021 (IQ+IIQ)

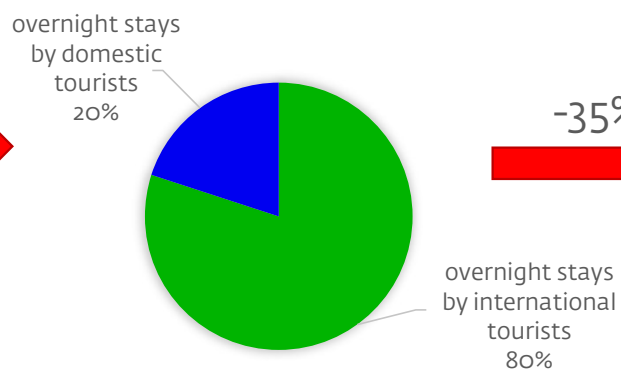


N=1 440 449



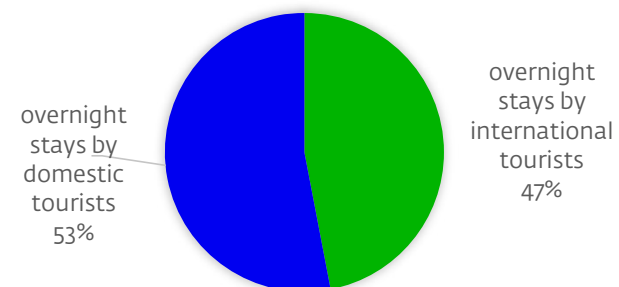
-59%

N= 593 227

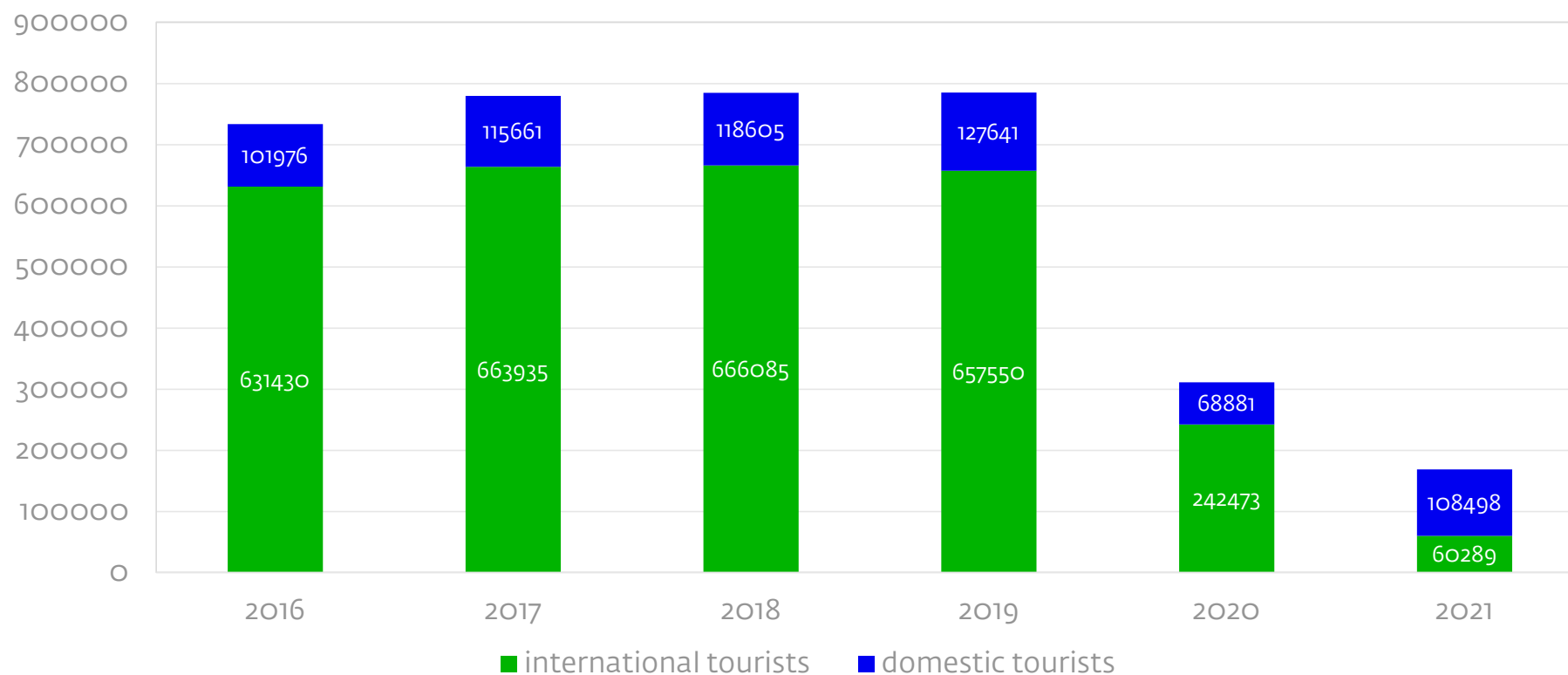


-35%

N= 383 030



Accommodated tourists in Tallinn, January - June



Source: Statistics Estonia

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Overnight stays of tourists accommodated in Tallinn, January - June



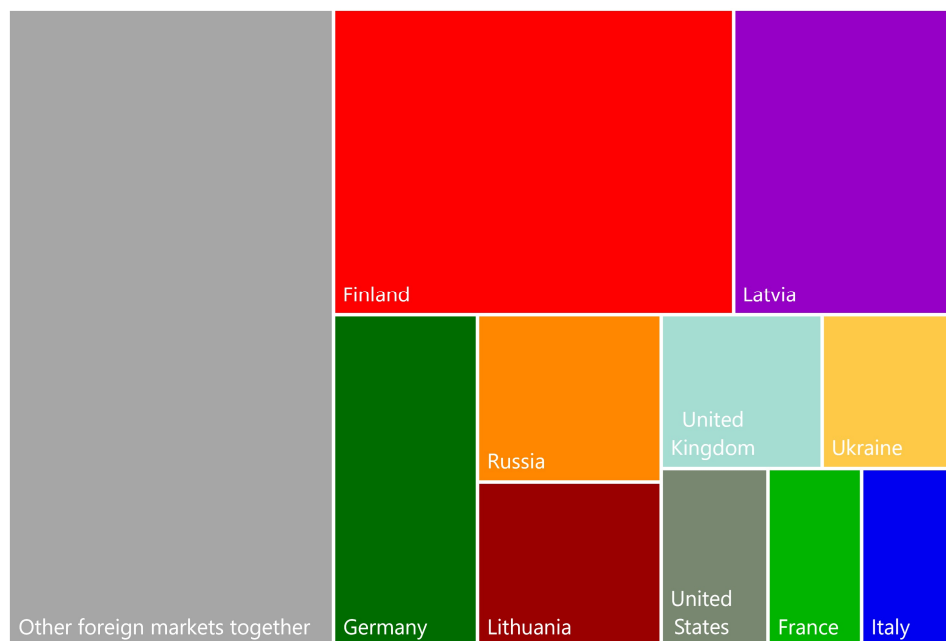
Source: Statistics Estonia

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Accommodated international tourists in Tallinn, (TOP 10) January - June 2021

N= 60 289 (-75%)



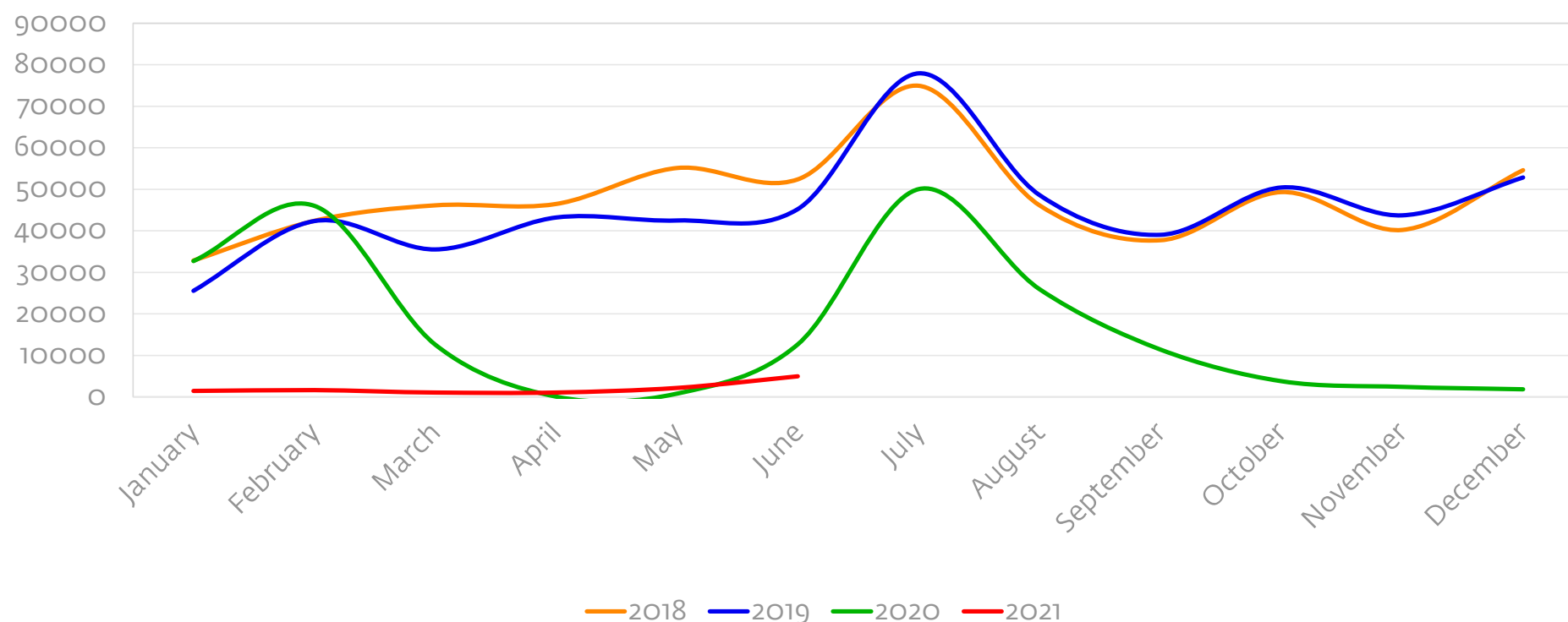
Source: Statistics Estonia

Country	Number	Change	
		Number	%
Finland	12 223	-92 598	-88
Latvia	6 693	-7 177	-52
Germany	4 797	-2 251	-32
Russian Federation	3 061	-37 858	-93
Lithuania	3 048	-4 526	-60
United Kingdom	2 468	-5 059	-67
Ukraine	2 000	-1 710	-46
USA	1 915	-1 518	-44
France	1 681	-1 142	-40
Italy	1 634	-683	-29
other foreign markets together	20 769	-27 662	-57

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Visits of Finnish tourists to Tallinn, 2018-2021

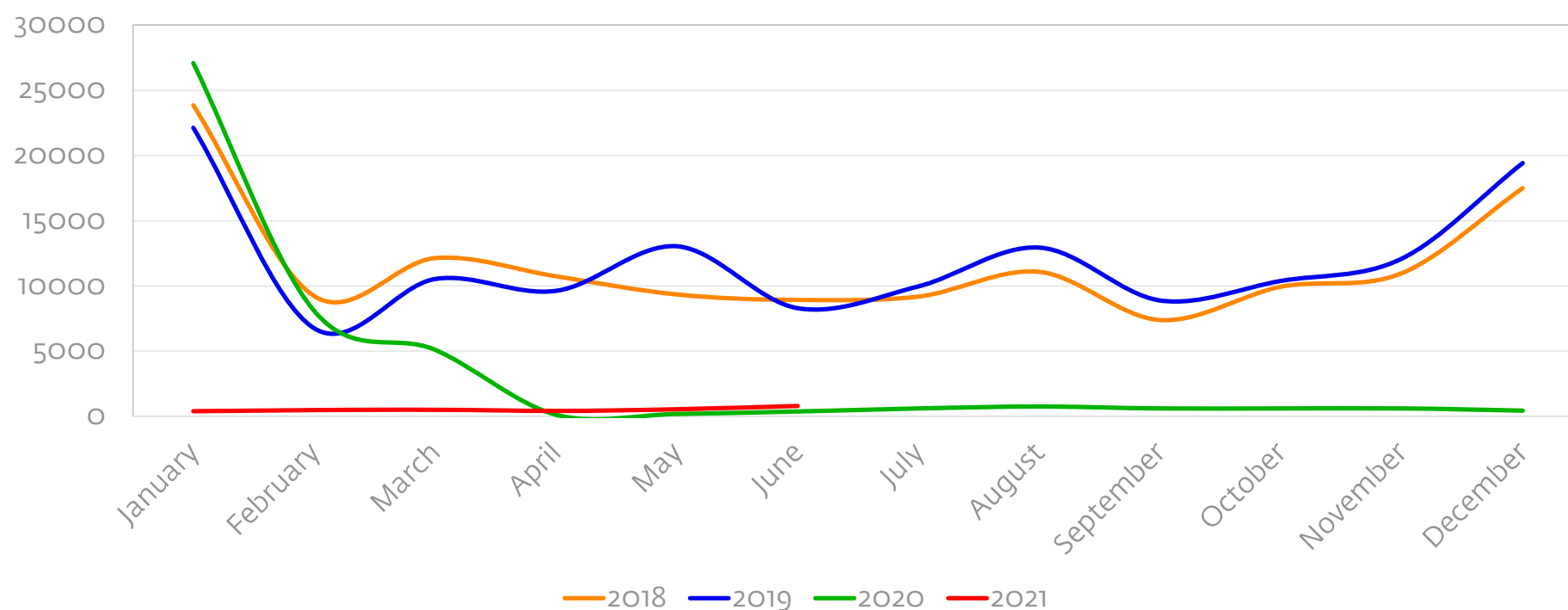


Source: Statistics Estonia

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Visits of Russian tourists to Tallinn, 2018-2021

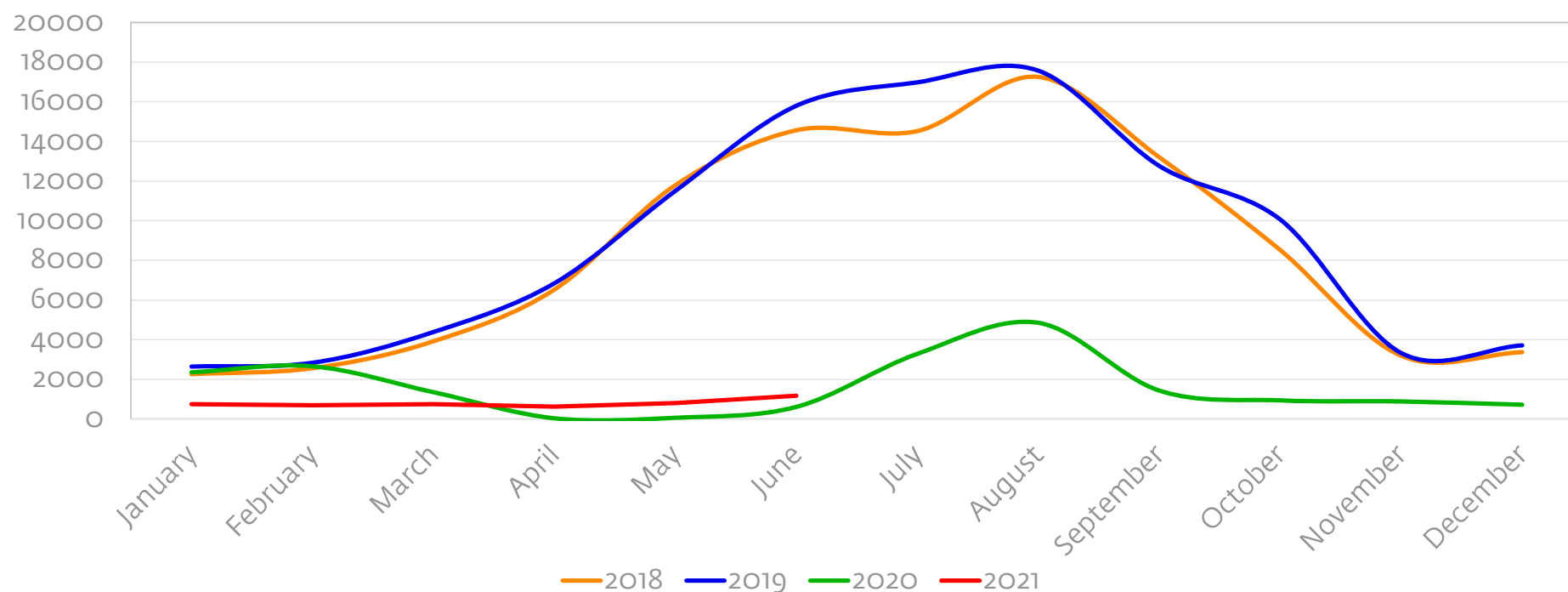


Source: Statistics Estonia

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Visits of German tourists to Tallinn, 2018-2021

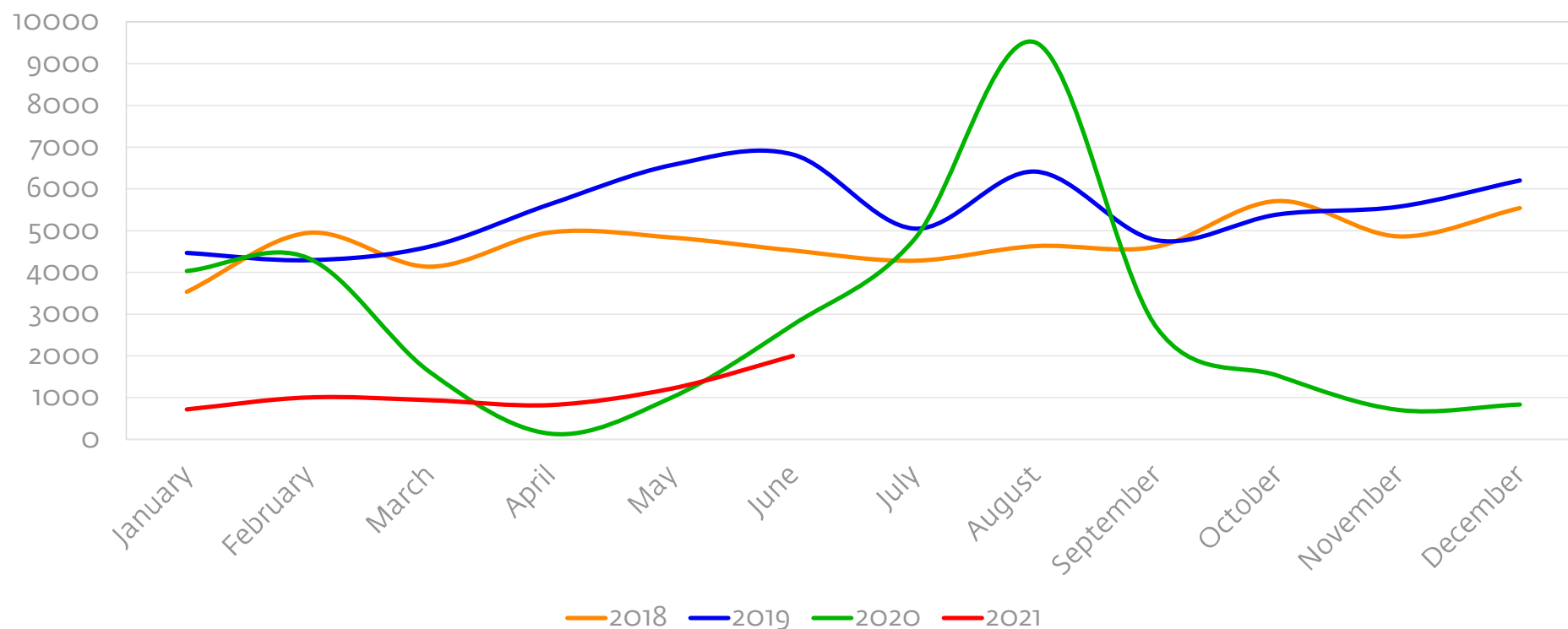


Source: Statistics Estonia

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Visits of Latvian tourists to Tallinn, 2018-2021

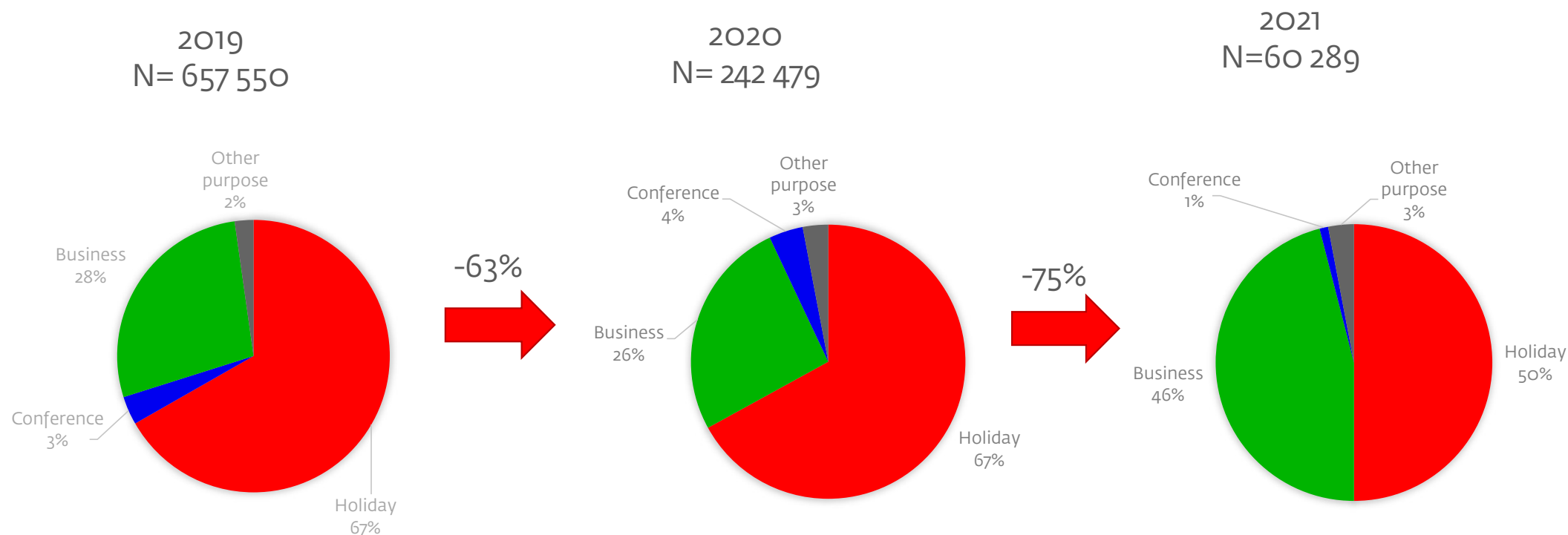


Source: Statistics Estonia

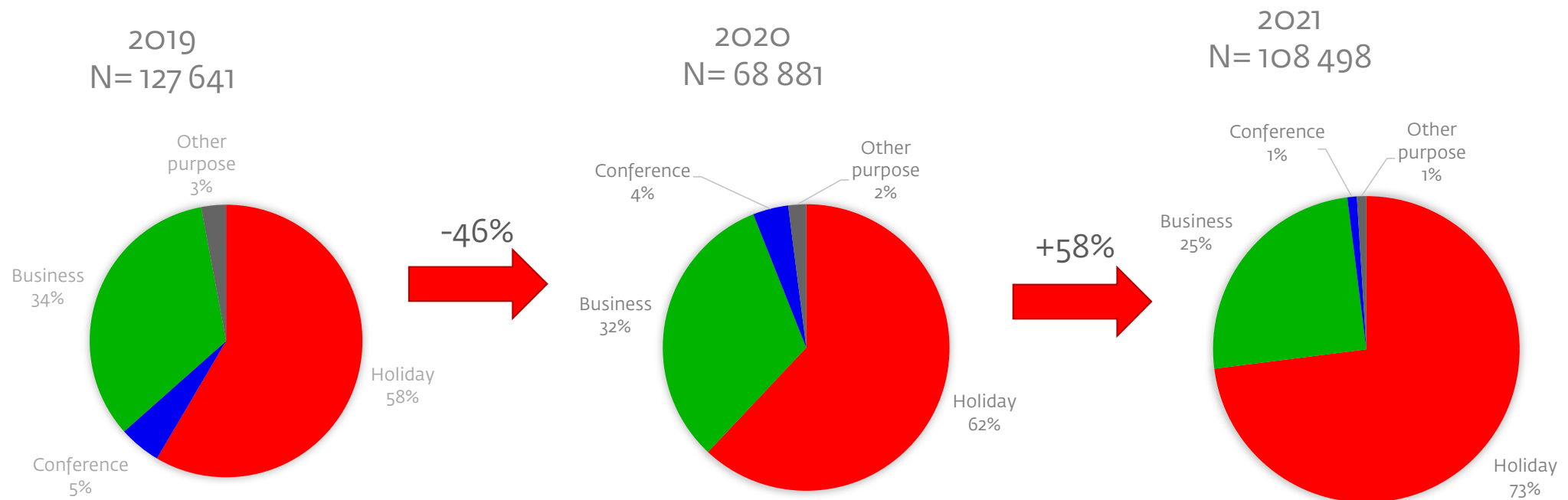
Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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International tourists by purpose of travel, January - June



Domestic tourists by purpose of travel, January - June



Source: Statistics Estonia

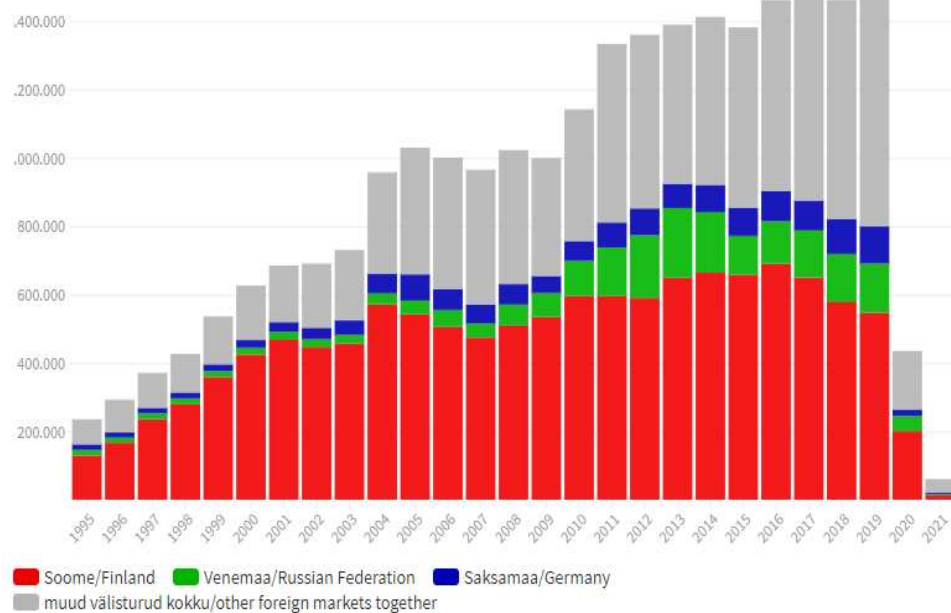
Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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Trends in important markets

Välisturistid Tallinna majutustevõttes 1995-2021 (IPA)

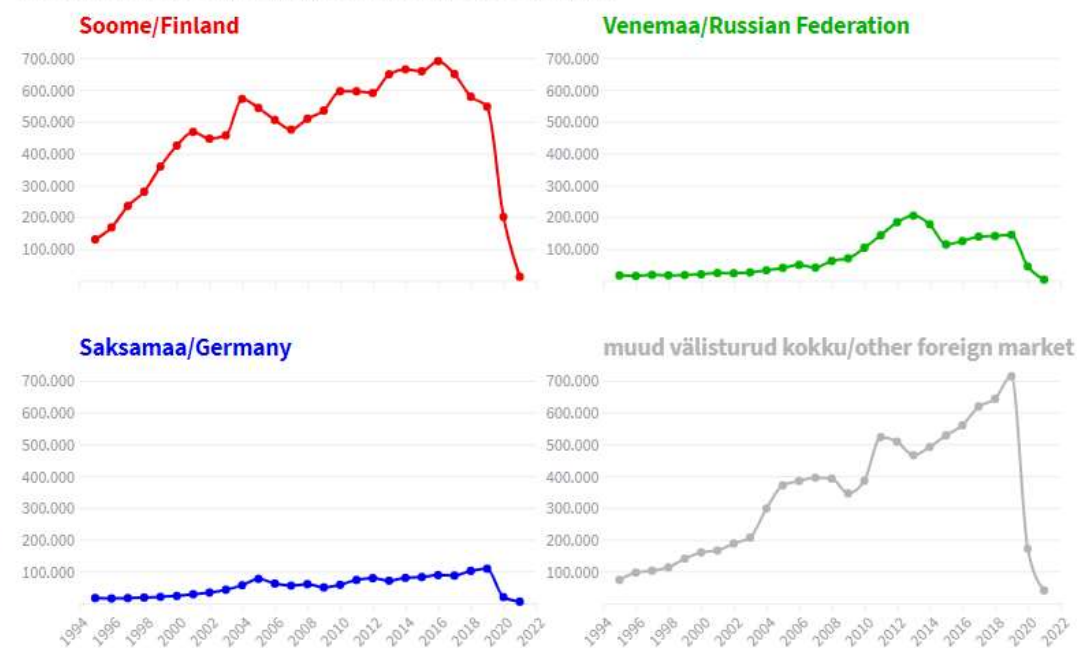
Accommodated international tourists in Tallinn



Source: <https://www.stat.ee/andmebaas/Statistikaamet>

Välisturistid Tallinna majutustevõttes 1995-2021 (IPA)

Accommodated international tourists in Tallinn



Source: <https://www.stat.ee/andmebaas/Statistikaamet>

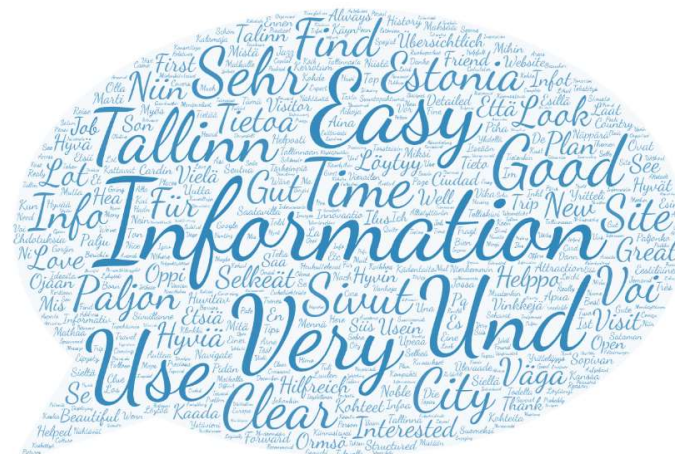
More: <https://app.flourish.studio/story/768427/edit>

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Visits To Marketing Website visittallinn.ee

	Sessions	Users	Page Views	Pages/Session	Avg. Session Duration	Bounce Rate
visittallinn.ee 1.01.2019.-30.06. 2019	1 163 266	785 199	3 145 623	2,7	02:46	59%
visittallinn.ee 1.01.2020.-30.06.2020	584 784	419 176	1534826	2,6	02:31	54,7%
visittallinn.ee 1.01.2021.-30.06.2021	181 829	136 432	391 860	2,2	01:49	66,28%

Average customer satisfaction score on visittallinn.ee given by website users was 8.6/10 (+0.3)

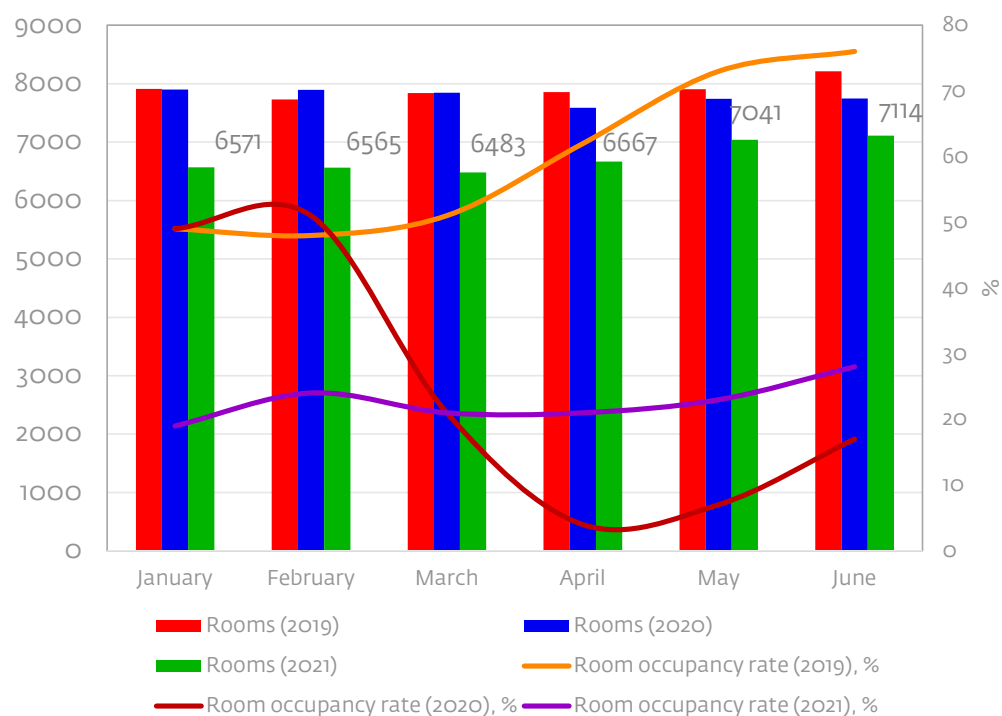


Report: [VisitTallinn veebistatistika](#)

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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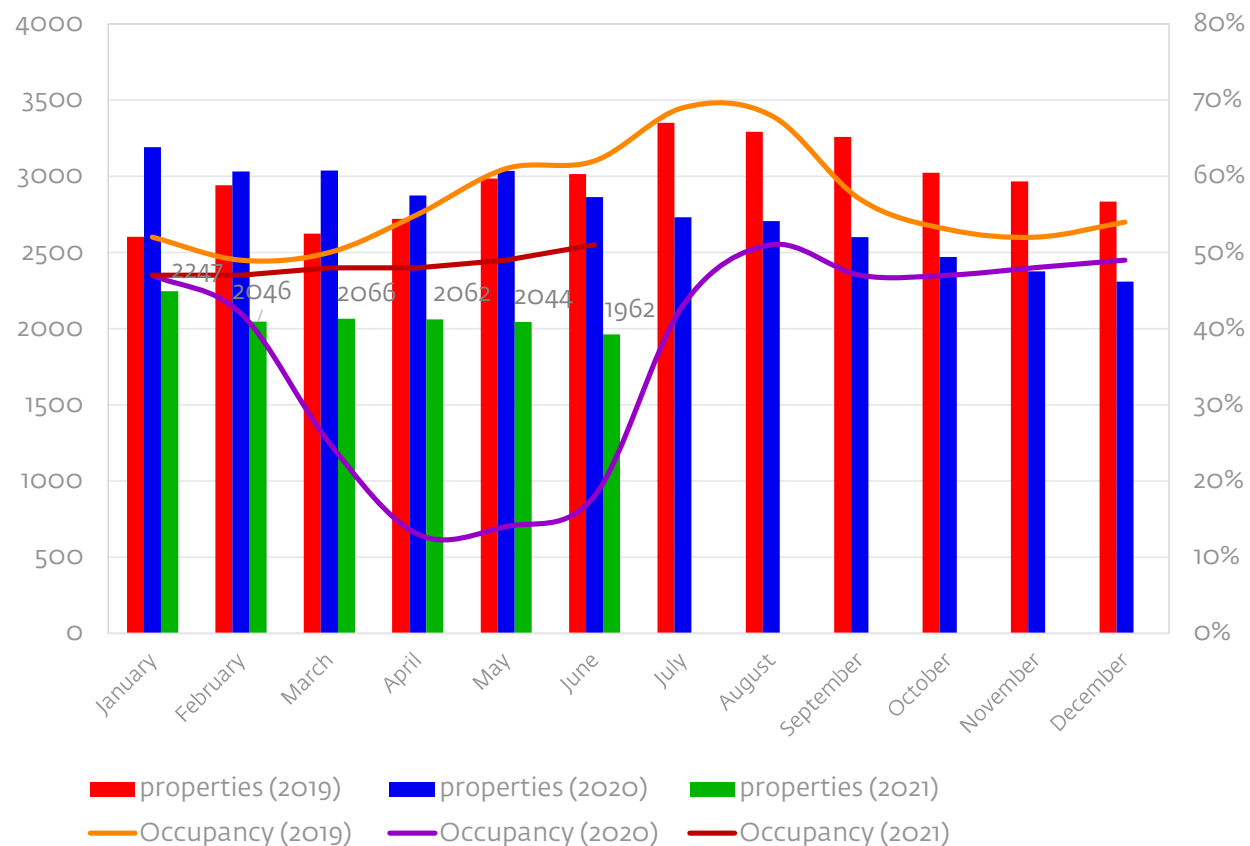
Room occupancy rate in Tallinn's accommodation establishments and the average cost



Source: Statistics Estonia

- According to Statistics Estonia, 109 accommodation establishments operated in Tallinn, including 42 hotels. They had 7,000 available rooms and could accommodate 14,500 guests.
- The average occupancy rate of rooms in accommodation establishments was 23%.
- The average occupancy rate of beds in accommodation establishments was 15%.
- The average cost of a guest night was 30 euros (-11%).
- Accommodation establishments in Tallinn made a total of 11,6 million euros from selling accommodation services, and compared to the previous year, the income of accommodation establishments decline by 48 per cent.

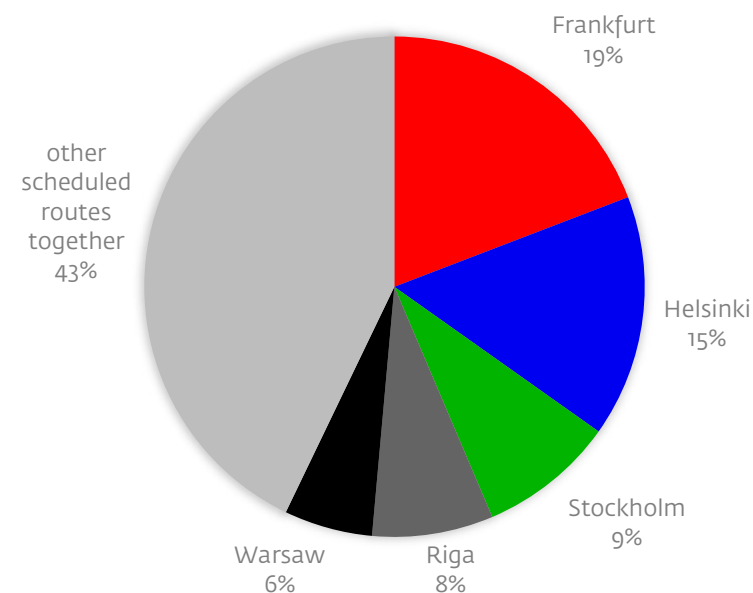
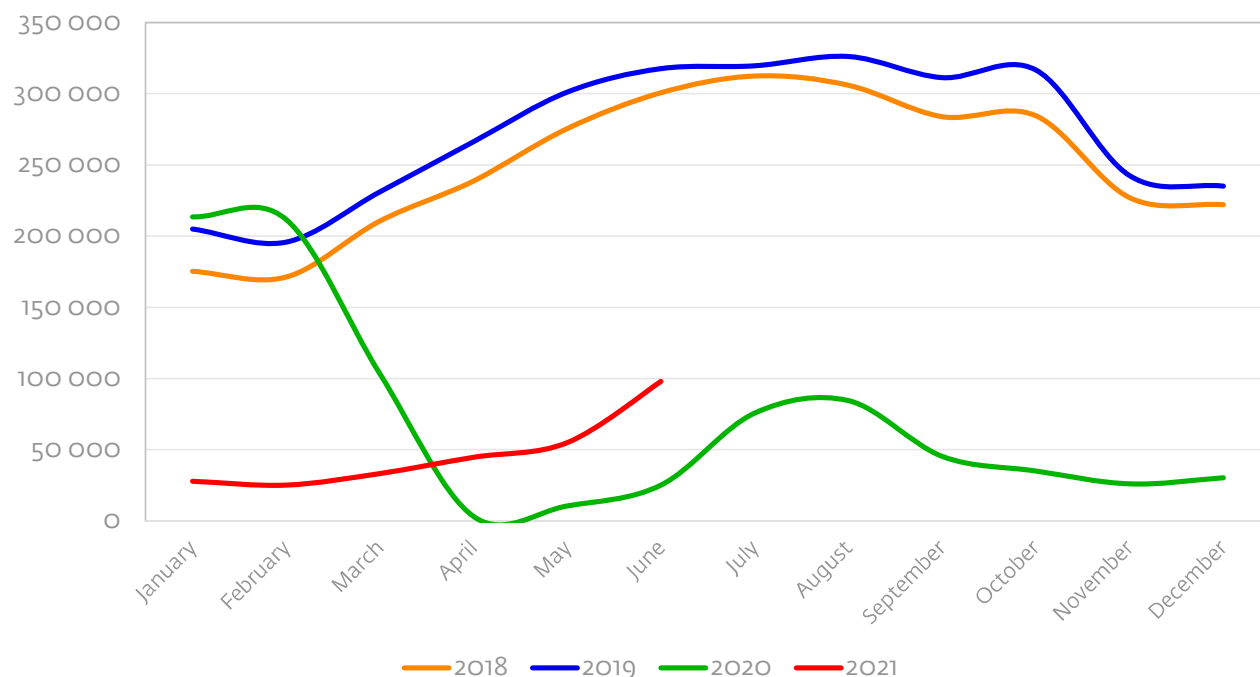
Short-term rentals in Tallinn



- According to Transparent , 2000 short term rentals (STR) operated in Tallinn (-31%). They could accommodate 7300 guests.
- The average occupancy rate in short term rentals was 48%
- The average cost of a guest night was 56 euros (+19%).
- Average customer satisfaction score given by accommodation customers was 4.77/5.

Passenger at Tallinn Airport

283 495 passengers (-50%) in total were served at Tallinn Airport. The largest number of passengers were served on Frankfurt(19%), Helsinki (15%), Stockholm (9%) and Riga (9%) flights.



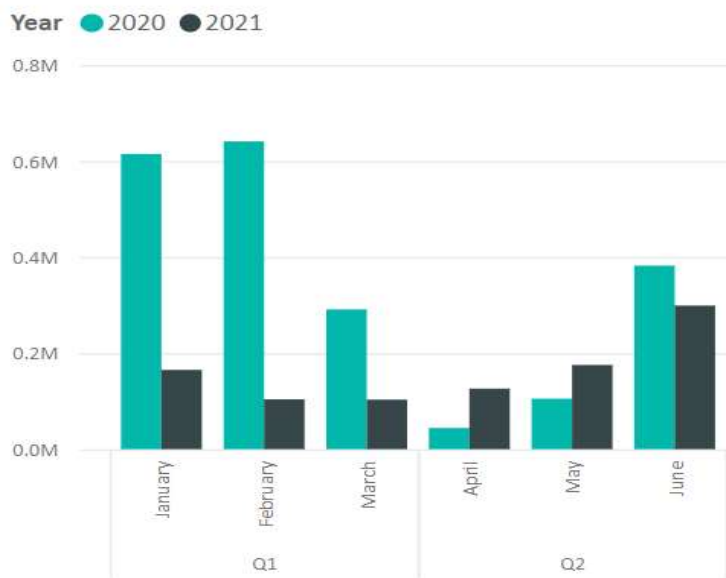
Source: Tallinna Lennujaam

Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

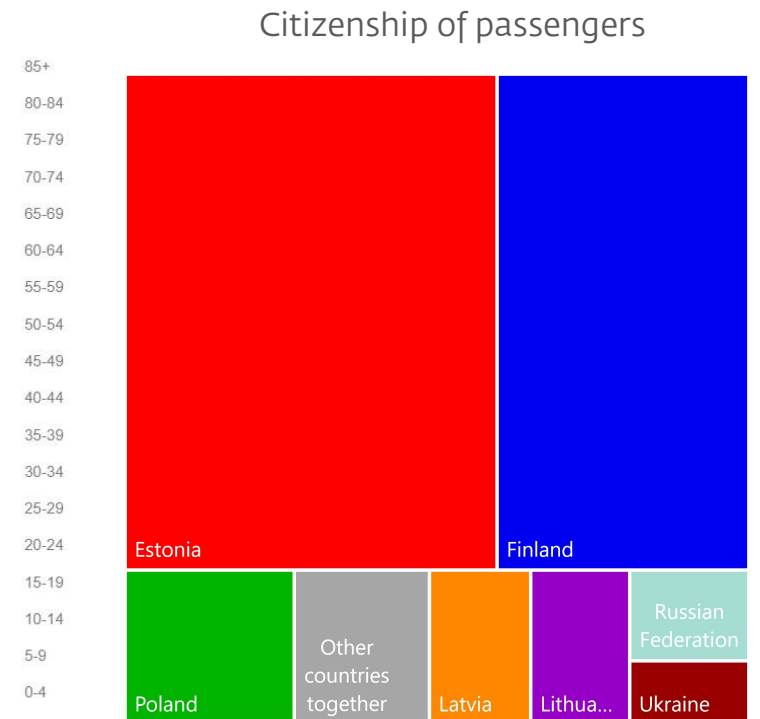
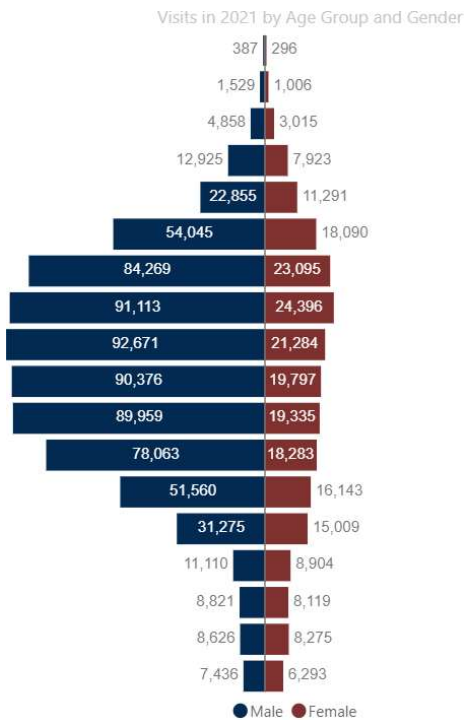
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Passengers by ferries

972 442 passengers (-78%) travelled through the Port of Tallinn. 90% of them travelled on the Finland route.



Source: : [Tallinna Sadam](#)



Tourism Trends in Tallinn in 2021 (Q1-Q2/2021)

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