

**MM** TCI  
**GY** Research

# Tallinn Reputation Report

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 [travelsat](#)

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# Contents

## TALLINN REPUTATION TRACKER

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3

### Methodology

MAPPING SOCIAL REPUTATION AT SCALE

8

### Social Reputation Data

TALLINN'S SOCIAL REPUTATION AT LARGE

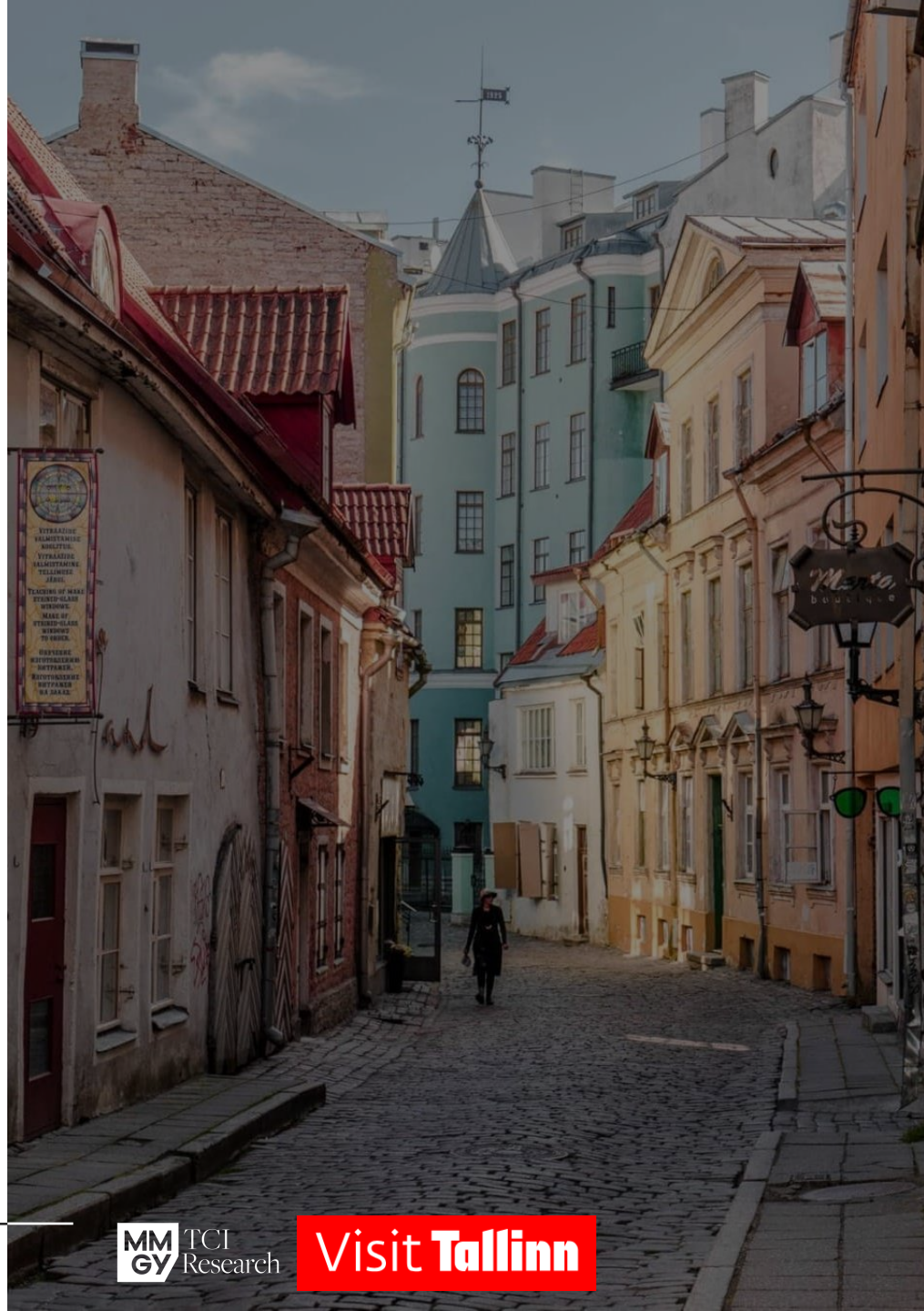
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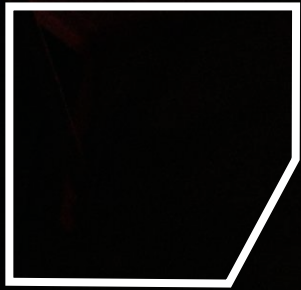
### Experience Reputation data

VISITOR EXPERIENCE-DRIVEN REPUTATION

18

### Take-Aways





# Methodology

MAPPING DESTINATIONS' REPUTATION AT SCALE



# Spaces in Destination Reputation

INFLUENCING DESTINATION REPUTATION

We track all factors shaping your destination's attractiveness

## Destination Context

This is comprised of **external, non-tourism related**, factors. While DMOs have **little control** over them, they continue to affect a destination's reputation.

## Destination Stories

An **innumerable amount of content is released daily**, from films and series, to articles, social media posts, and campaigns, to name a few. With DMOs having a **slight degree of control** over them, stories can serve as drivers or detractors when considering destinations.

## Destination Experience

Visitors have contact with many of the different points of interest in a destination throughout their travels. The **quality of these experiences** serve towards a destination's reputation, an aspect DMOs have a **higher level of control** over.



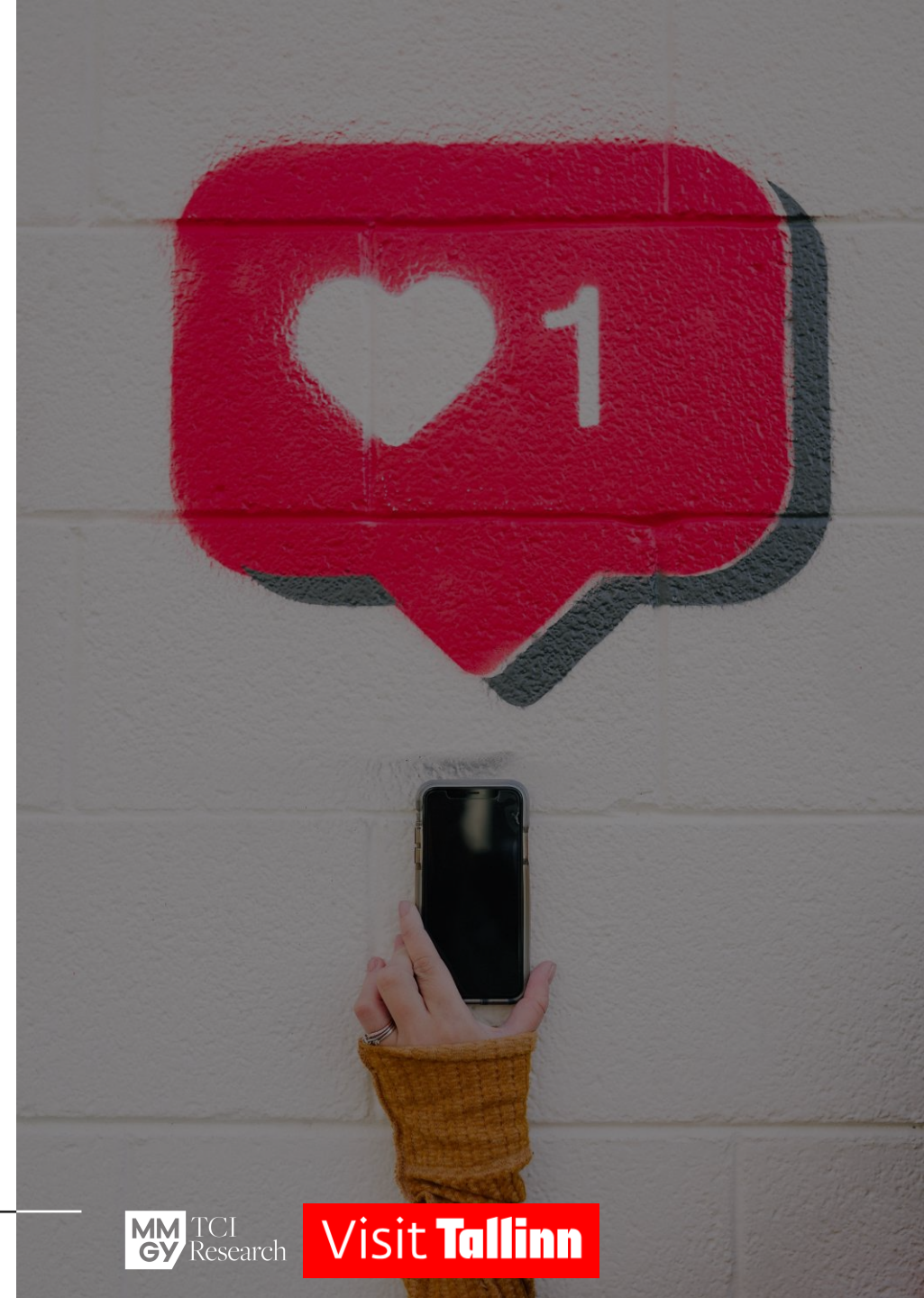
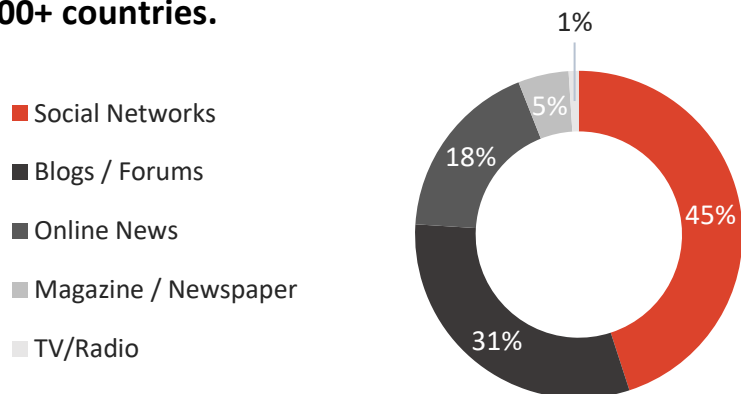


# Social Sentiment Data

## METHODOLOGICAL OVERVIEW

### Analysing online social conversation data

- The “**sentiment**” reflects the **state and dynamic of travel brands’ e-reputation** as expressed in **global web social conversations “at large”**.
- Shared by **different types of media, consumers, companies, citizens, brands and officials** on websites, forums, blogs & social networks.
- Sentiment is not predictive of travellers’ planning, but a **positive e-reputation is essential to generate favourability towards destinations** and travel brands.
- In the past 12 months, **Tallinn was mentioned in 26K+ social conversations** in the context of travel, generating 160K+ engagements, shared by **10 200 unique authors** from **100+ countries**.



# Ratings & Reviews Data

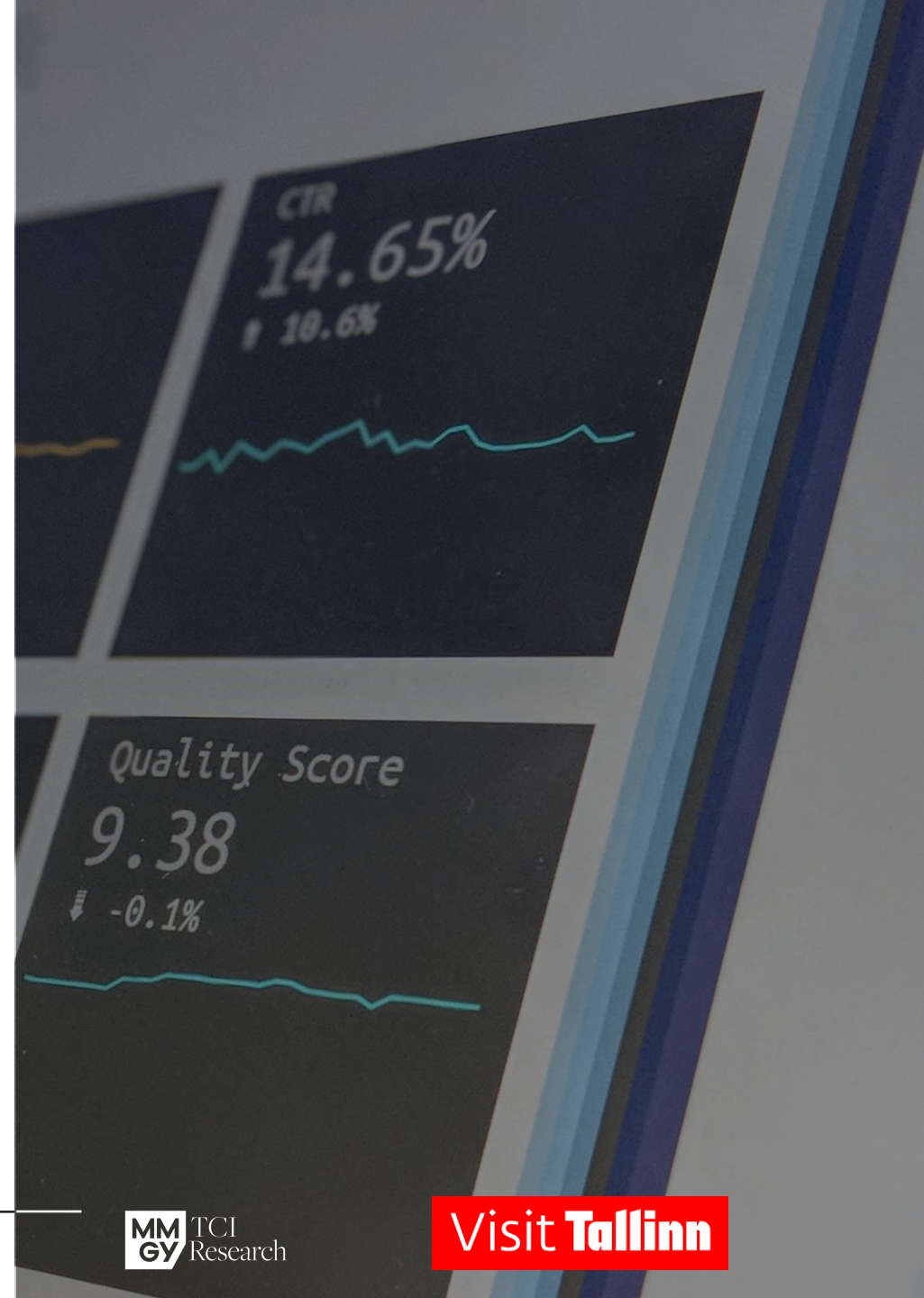
## METHODOLOGICAL OVERVIEW

### Consolidating ratings and reviews

- TRAVELSAT® Pulse uses a solid **aggregation methodology to consolidate reviews**, both **numerical scores** and **written feedback**, from sources that cater to different aspects of the tourism ecosystem. It should be noted that not all ratings can be associated with specific markets.
- The platform presents all scores through a **consolidated scale of 0-10**. These have been **converted from their original source** and are **weighted to adjust the significance** that each source score has. Analyses are carried out across verticals, markets and guest profiles.

### Sentiment analysis technology

- Beyond structured ratings, **written reviews are also analysed using the most developed sentiment lexicon**. This allows for an analysis of **positive and negative deflections by keywords** by sub-category and guest profile.
- The AI semantic engine **covers 14 languages**: *Arabic, Russian, Polish, Portuguese, Swedish, Norwegian, Danish, English, French, German, Dutch, Spanish, Italian, Finnish*. However, **ratings and reviews are collected for all sourcing markets** sharing their experience on the rating platforms.



# Rating & Reviews Data

TALLINN'S TOURISM ECOSYSTEM & BENCHMARK DEFINITION

## Sources connected to TRAVELSAT® Pulse

- The sources range from search engines with a review function, such as Google, to complete online travel agencies, like Trip Advisor and Booking.com. Currently having **45 sources connected** (Google, TripAdvisor, Booking etc), over 95% of online reputation data is analysed.
- All rating platforms collect **global data on the same KPIs**, ensuring **accuracy when comparing to other destinations**. Benchmarking data is therefore based on the largest Hospitality Datasets available.

## Sample definition & analysis period

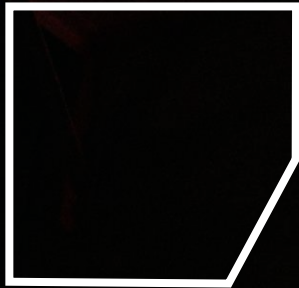
- From a full inventory of properties, combinations of Categories available as markers within the property information are being created as pools. From this mix, the top-active properties are picked in each category, making sure there are no duplicates. The remaining properties help create a diverse and representative collection of POIs and experiences, and this process applies to all Accommodations, Restaurants and Attractions.
- The report analyses data ranging from **Oct. 1<sup>st</sup> 2022, to Oct. 31<sup>th</sup>, 2023**.

## Corpus Analysed – Reviews Count

01/10/2022 to 31/10/2023

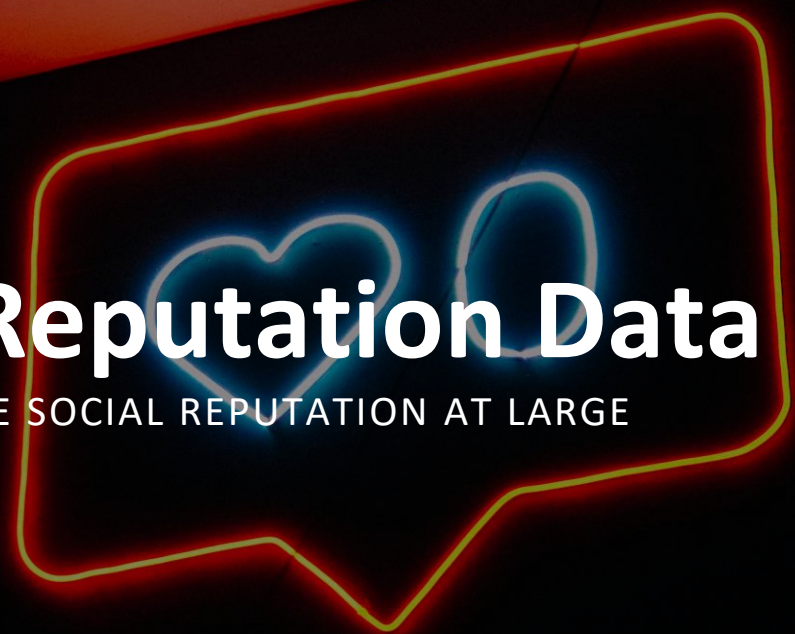
Verticals	TALLINN	HELSINKI + STOCKHOLM	RIGA + VINIUS
Reviews Counts	151,040	525,351	319,507





# Social Reputation Data

TALLINN'S ONLINE SOCIAL REPUTATION AT LARGE



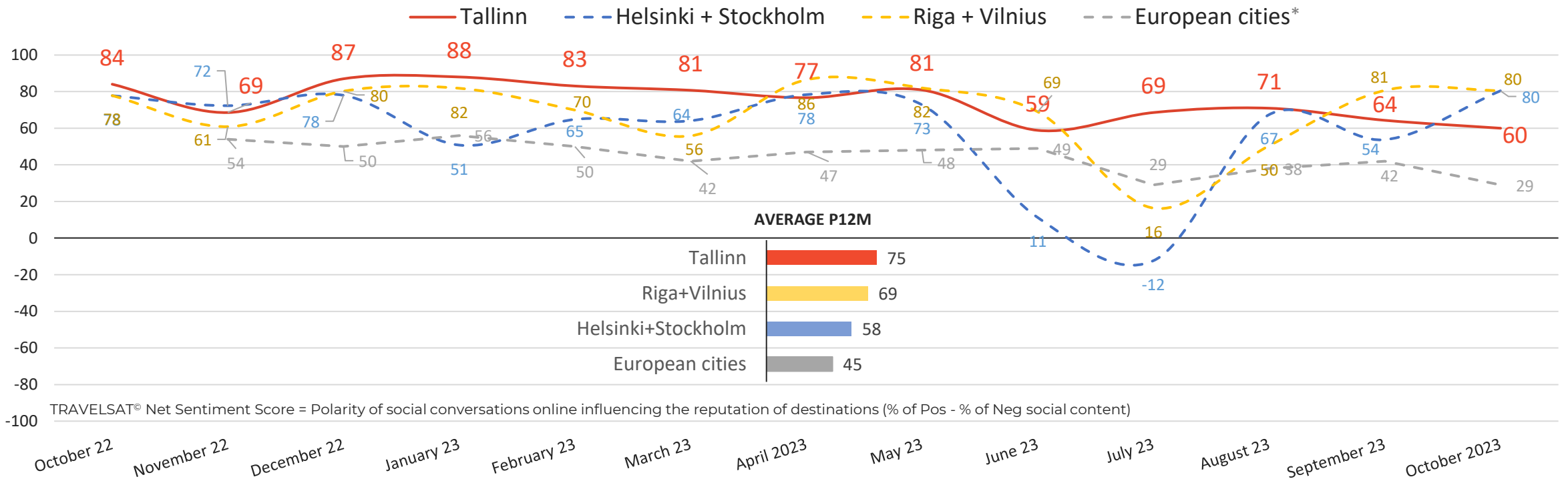


# Net Sentiment Index

WHAT IS THE POLARITY OF TALLINN' REPUTATION VS COMPETITION?

## Tallinn' reputation is competitive and less resistant to external geopolitical factors than competition

**Social sentiment for Tallinn remains consistently high throughout 2023**, with numerous positive discussions encompassing travel recommendations, the promotion of seasonal events, and an emphasis on sustainability; the results remain relatively unaffected by external factors, contrary to benchmark cities, which are more susceptible to negative discussions stemming from the complex geopolitical context (including the war in Ukraine and protests around religions, politics...)



\* Datas extract from City Dna Dashboard : average calculated over a set of destinations in Europe

# Reputation Topics - Focus sustainability

TRENDS FOR TALLINN'S ONLINE REPUTATION



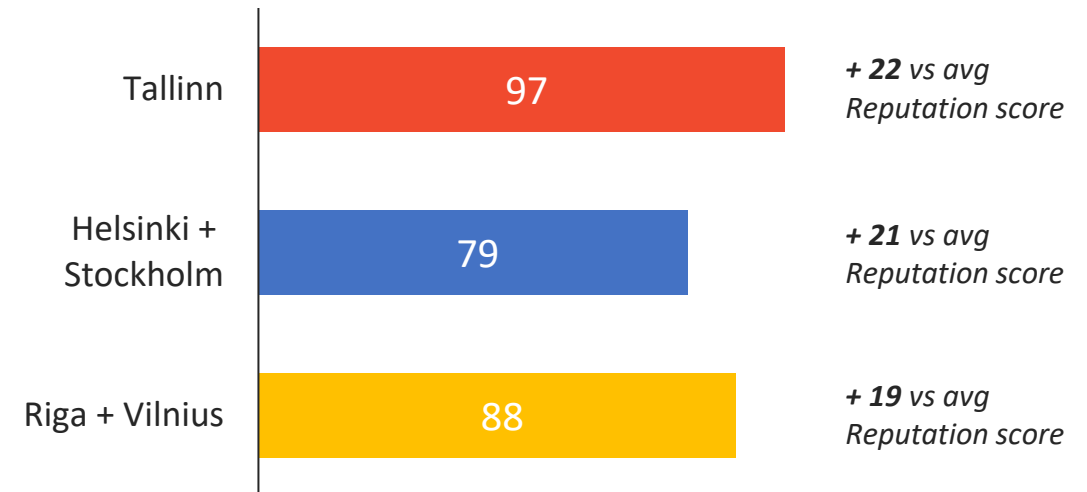
**Though less present in social conversations vs competitors, sustainability widely elevates positive reputation for the city**

Sustainability still represents a minor topic in total travel conversations overall, though more present in Nordic cities. However, the tonality of conversations mentioning Tallinn in relation to sustainability is extremely positive and above competition, showing a great potential of impact for the city's attractiveness.

**% Share of online social conversations related to Sustainability**



**Polarity of social conversations related to Sustainability**



Period of analysis: October 1<sup>st</sup> 2022, to October 31th, 2023.



# Positive Sentiment Drivers around Sustainability

10 STORIES FUELING TALLINN'S SOCIAL REPUTATION FOR SUSTAINABILITY



## A multi-faceted sentiment bringing a concrete dimension to sustainability in travel and adjacent sectors

Tallinn is acknowledged for its **eco-friendly initiatives**, including **sustainable transportation** (Tram system, MS Myster ship...), **green events**, decarbonization policy, **heritage** preservation, **technological innovation** (BOLT, robot couriers...), while also being recognized for its commitment to **sustainable dining**.

### Examples of 10 positive reputation drivers

- Well-balanced eco-friendly initiatives complemented by contemporary attractions and a charming old town with multicolored houses and a distinctive bell tower.
- Highlighting the 135th anniversary of Trams in Tallinn and offers an exploration of the city's tram system and Tallinn's public transport, which includes trams, trolleybuses, buses, and Elron trains.
- The upcoming delivery of the MS MyStar, Tallink Grupp's environmentally conscious vessel which represents a significant step in Tallink's commitment to eco-friendly transportation.
- The focus on biodiversity protection, carbon footprint reduction, and sustainable governance throughout the year, with events like an opening ceremony and a green innovation expo for visitors to enjoy
- Tallinn Airport giving electric cars to employees involved in aircraft servicing, marking a significant move toward reducing the company's carbon footprint.
- Recommended eco-friendly lodging line the Hektor Hotel
- Focus on developing carbon-neutral mobility, with pilot project involving robot couriers designed to be environmentally friendly to protect the UNESCO-protected medieval quarter and pedestrian areas, adhering to traffic laws and restrictions.
- Estonia's commitment to local and sustainable dining, with two Michelin Green Star-awarded restaurants, Fotografiska in Tallinn and Restaurant Soo, recognized for their high sustainability standards, innovation, and accountability
- Eco-friendly chewing gum brand True Gum aims to expand globally in travel retail, emphasizing sustainability through strategic marketing and new partnerships with key operators like Dufry, WHSmith and Tallink Group.
- Tallinn's reputation as the "Gem of the Baltic" and explores the growth and appeal of Estonia's tech scene, encouraging visitors to consider the eco-friendly city for their next professional or lifestyle move
- Estonian company BOLT has released the Bolt 6 scooter in Lisbon, Riga, and Tallinn, emphasizing safety and sustainability with a focus on longevity and reduced environmental impact.

Period of analysis: October 1<sup>st</sup> 2022, to October 31th, 2023.

# Illustrative Social Posts

STORIES REFLECTING POSITIVE SENTIMENT

## The best mini-breaks in Eastern Europe – plus where to stay, eat and visit

richard mellor created a post

...boxes of many of today's **travel** tribes. Those who struggle with **overtourism** can explore quieter cities. Vast food markets ... lofthotel.sk) 6. **Tallinn**, Estonia Green shoots and bogland walks initiatives including a move towards **carbon**-neutral...

published on 26/01/23 at 18:00 | Newspaper | United Kingdom | [www.thetimes.co.uk](http://www.thetimes.co.uk)

## Trams in Tallinn, Estonia: Celebrating 135th anniversary 🇪🇪 | August 2023



Aviationvlad video condiviso

...tram rides along **Tallinn** city center. **Tallinn** tram system is the perfect example of a **sustainable** city planning, high ... focuses on a transit oriented development. **Tallinn** tram system has a unique 1067mm (3,5) narrow-gauge that is being used by...

published on 01/09/23 at 15:30 | YouTube | United States | [youtube.com](http://youtube.com)

## Tallink ferry MyStar to debut on Tallinn-Helsinki route next Tuesday



err news created a post

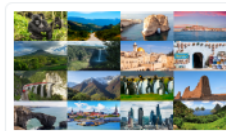
...upholds **sustainable** values." The MyStar is scheduled to depart from Rauma Shipyard this Friday and arrive at **Tallinn's** Old ... route next week, departing on its maiden **voyage** from Tallinn to Helsinki at 1:30 p.m. on Tuesday and replacing the

MS...

published on 05/12/22 at 16:16 | Online News Other | Estonia | [news.err.ee](http://news.err.ee)

Period of analysis: October 1<sup>st</sup> 2022, to October 31th, 2023.

## Exceptional Trips 2023 | Bradt Guides



bradt guides created a post

...Year, **Tallinn's** focus will be on protecting its **biodiversity**, reducing its **carbon** footprint and promoting **sustainable** ... your **trip** to Saint Lucia can be found on the Tourism Authority website. Did you know? Members of the Bradt **Travel** Club...

published on 09/01/23 at 14:25 | Blogs | United States | [www.bradtguides.com](http://www.bradtguides.com)

## First electric cars introduced at Tallinn Airport



international airport review created a post

First electric cars introduced at **Tallinn** Airport **Tallinn** Airport has introduced three electric vehicles for aircraft ... emissions as part of the airport's **sustainability** goals and aim to be **carbon** neutral by 2030. Three electric cars for...

published on 05/01/23 at 16:49 | Magazine | United Kingdom | [www.internationalairportreview.com](http://www.internationalairportreview.com)

## Hektor Container Hotel in Tallinn, Estonia 🇪🇪 is a must | Highly recommended to stay here



Aoon The Traveller shared a video

#Tallinn #Estonia #tallinnoldtown #tallinngam #tallinnonline #tallinncity #tallinna #tallinn\_city #tallinnestonia ... #StaySmart #containerhotel #sustainablehotel #tallinnphotographer #visittallinn #tallinnfood #Foodie #Foodblogger...

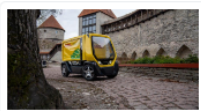
published on 25/12/22 at 19:19 | YouTube | United States | [youtube.com](http://youtube.com)



# Illustrative Social Posts

STORIES REFLECTING POSITIVE SENTIMENT

## Robot couriers will deliver the future to Tallinn's medieval Old Town



<https://www.studiox.bg/> created a post

...year in style **Tallinn** will be the European Green Capital in 2023 and its ambition is to develop **carbon-neutral** mobility in ... active place for business and an attractive **tourist** attraction. Therefore, it is reasonable to use innovative mobility...

published on 25/11/22 at 14:37 | Online News Other | Poland | [www.themayor.eu](http://www.themayor.eu)

## Are you an eco-conscious traveller? Here's why Estonia should be your next destination

copyright created a post

...tourism's **impact** on the **environment**, Estonia is emerging as one of the continent's best-kept secrets for **sustainable travel** ... Europe, you can find beautifully-preserved **nature**, **eco-friendly** accommodations, low-impact activities and farm-to-table...

published on 31/05/23 at 15:51 | TV/Radio | France | [www.euronews.com](http://www.euronews.com)

## True Gum emphasises its eco-friendly edge to target expansion in travel retail



Wednesday created a post

...global **travel** retail, by leveraging its **eco-friendly** credentials as a plant-based gum packaged in **sustainable** cardboard ... DF&TR market, where **travellers** are increasingly looking for **sustainable** and **eco-friendly** alternatives to traditional

chewing...

published on 05/04/23 at 10:15 | Magazine | United States | [www.trbusiness.com](http://www.trbusiness.com)

**Period of analysis:** October 1<sup>st</sup> 2022, to October 31th, 2023.

## A guide to working in the Tallinn, Estonia tech scene



pippa hardy created a post

...the **Tallinn**, Estonia tech scene Are you ready for your next tech adventure? Do you want to move to an **eco-friendly** city ... links? Well, maybe it's time you considered **Tallinn**, known as the Gem of the Baltic. Estonia's tech scene has been making a...

published on 19/10/22 at 16:29 | Magazine | United Kingdom | [www.information-age.com](http://www.information-age.com)

## Estonian unicorn Bolt launches new-gen scooter to boost global micromobility – Invest in Esto...



photos by bolt created a post

...Riga, and **Tallinn**, offering safer, smarter, and more **sustainable** transportation options to residents and **visitors** ... s. **Sustainability** and comfort, backed by Estonian engineering Bolt aims to be an industry leader in **sustainability**, and...

published on 01/08/23 at 15:19 | Blogs | United States | [investinestonia.com](http://investinestonia.com)



# Experience Reputation

TALLINN'S VISITOR EXPERIENCE

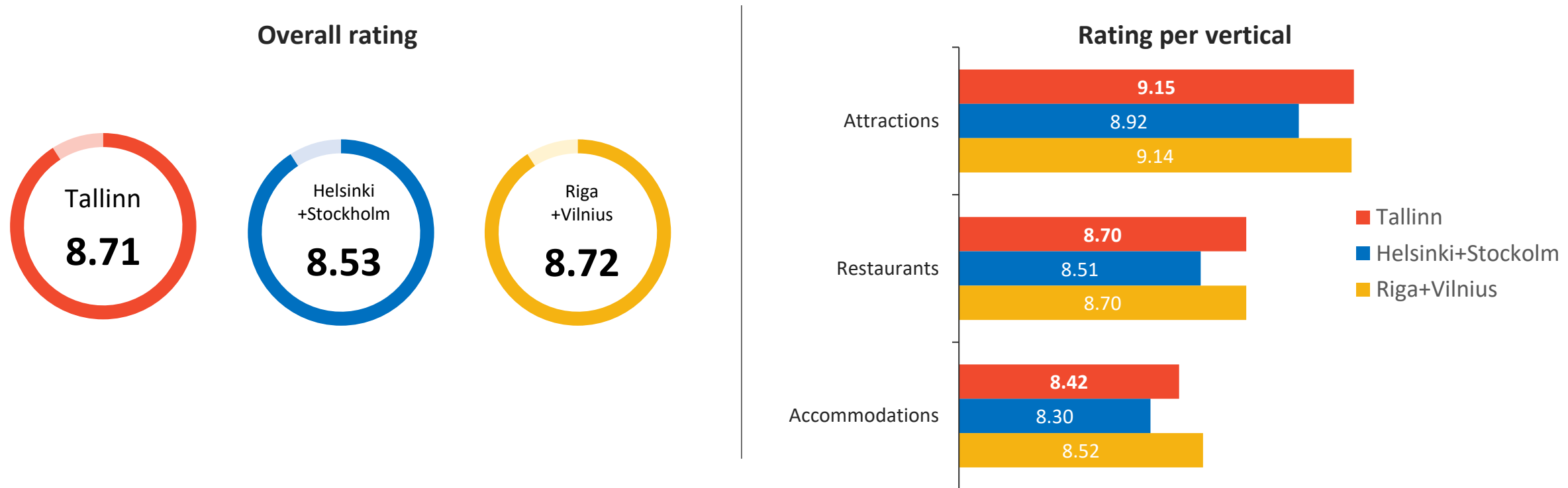


# Tallinn Visitors' Rating

EXPERIENCE REPUTATION: RESTAURANTS, ACCOMODATIONS & ATTRACTIONS IN TALLINN

## Tallinn, and Baltics overall, perform well with visitor ratings

Tallinn and Riga plus Vilnius are on par overall and receive more positive ratings than Nordic cities studied. The competitive position of Baltic cities for visitor sentiment is visible for all 3 verticals (lodging, restaurants and activities), with Riga/Vilnius slightly surpassing Tallinn for accommodation's quality experience.



**Note:** Data presented here stems from numerical ratings.

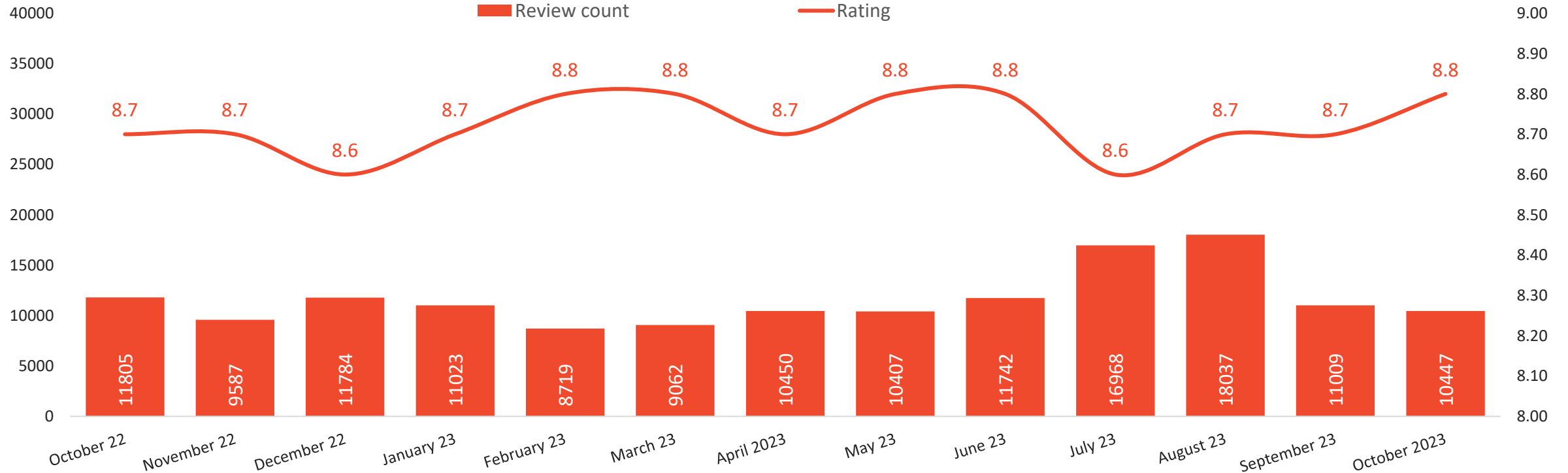
**Period of analysis:** October 1<sup>st</sup> 2022, to October 31th, 2023.

# Visitor Rating Seasonality

MONTHLY BREAKDOWN OF REVIEW VOLUME & OVERALL RATING FOR RESTAURANTS, ACCOMODATIONS AND ATTRACTIONS

## High satisfaction levels across the year – with a slight dip in December and July

Tallinn’s monthly review volume was relatively lower in February, steadily growing towards spring and being higher in the summer. This is a typical scenario, likely matching visitation patterns. Overall rating is highest in February, dipping during the warmer months or near Christmas. Higher visitation levels can affect experience quality due to increased tourism pressure, with a rebound seen right after summer.



Note: Data presented here stems from Numerical ratings.

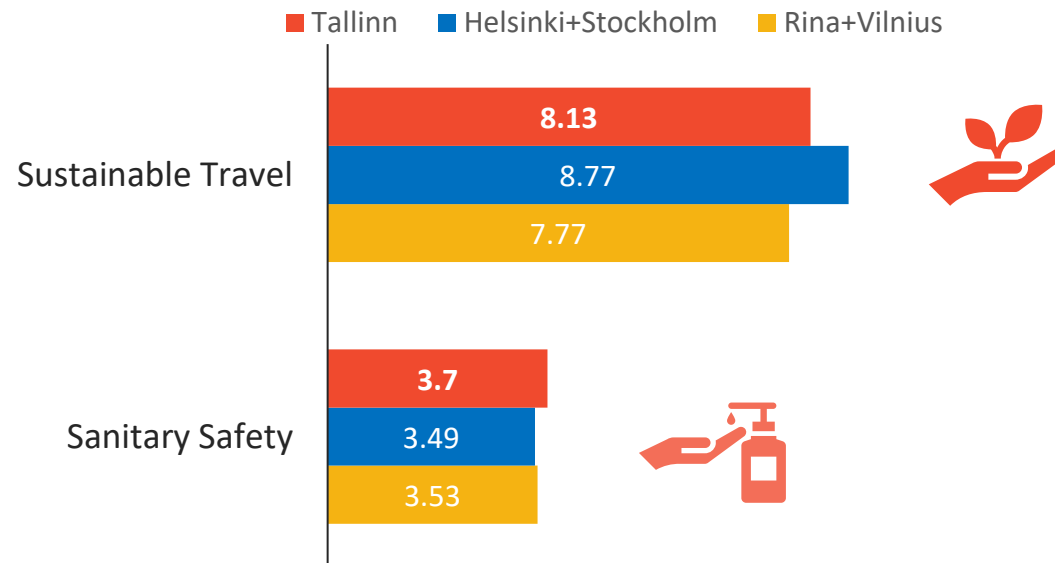
# Tallinn Visitors' Sentiment

EXPERIENCE REPUTATION: SENTIMENT SCORES (SUB-CATEGORIES)

## Sustainability is confirmed to be a driver of positivity for visitor sentiment across cities

Mentions around sustainable practices are generally very positive in opinions shared by visitors across all cities -particularly in Nordic destinations- and Tallinn is no exception to the rule. Sanitary safety mentions are inherently more negative and requires destinations to maintain vigilance on this still important facet of the visitor experience.

### Sentiment Scores



Note: Data presented here stems from written reviews.

**Sustainable Travel:** Reviews containing keywords on the protection of the environment, crowdedness, and/or social impact on local populations in relation to travel are scored for their sentiment polarity.

**Sanitary Safety:** Reviews containing keywords having to do with the general quality of security in relation to hygiene and sanitation that visitors or clients feel in a destination

Period of analysis: October 1<sup>st</sup> 2022, to October 31<sup>th</sup>, 2023..



SOUVENIRS

# Take-Aways

What Social and Reviews Data say about Tallinn



# 8 Take Aways

## WHAT DATA TELL US ABOUT TALLINN VS COMPETITION

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- 1. High and resilient Social Sentiment:** Tallinn maintains a high social sentiment throughout 2023, with positive discussions about travel recommendations, seasonal events, and sustainability. This sentiment remains quite stable despite external geopolitical factors, unlike its competitors.
- 2. Sustainability as a Positive Reputation Driver:** Although sustainability is a bit less discussed in relation to Tallinn compared to its competitors, when it is mentioned, it has an extremely positive impact on the city's reputation.
- 3. Multi-Faceted sustainable Initiative:** Tallinn is recognized for its eco-friendly initiatives, including sustainable transportation, green events, decarbonization policies, heritage preservation, and technological innovations among other drivers. Tallinn's eco-friendly reputation is bolstered by various initiatives that touches various travel and adjacent sectors (transportation, hotels, food, tech scene...), building credibility for the topic;
- 4. Visitor Ratings and Competition:** Tallinn, along with Riga and Vilnius, receives more positive visitor ratings than Nordic cities. The Baltic cities are competitive in terms of visitor sentiment, particularly in lodging, restaurants, and activities, offering excellent value for money to visitors.
- 5. Seasonal Variations in Visitor Satisfaction:** Tallinn experiences high satisfaction levels year-round, with a slight dip in December and July. This pattern is usual while crowding context or travel frictions tend to happen more during peak seasons.
- 6. Impact of Sustainability on Visitor Sentiment:** Sustainability practices positively influence visitor sentiment across all studied cities, including Tallinn.
- 7. Sustainability plays a vital role** in forming the complete experience for visitors, and evidence indicates that Tallinn's overall standing is beginning to be mirrored in the visitor experiences, despite a limited volume of social and reviews data related to this concept;
- 8. Sanitary Safety as an Ongoing Concern:** While sustainability drives positive sentiment, sanitary safety remains a critical aspect of the visitor experience that requires ongoing attention from destinations.



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**Visit Tallinn**