

## Overview of Conferences in Tallinn 2022

The purpose of collecting data on conference events is to get an overview of the conferences taking place in Estonia. The business tourism unit of the Tallinn Tourism Department collects, processes and analyses the received data, the output of which is an annual overview of conference events. The overview is, in turn, an input for answering various inquiries related to destination investments, development projects and infrastructure development, for the aggregation of input data when compiling rankings of international conference destinations and for assessing the scope, economic impact and development potential of the events taking place in Tallinn.

Enterprises that organise conference events in Tallinn have been submitting data to the Tallinn Tourism Department since 2001. Data about conference events is collected in the meetings.ee database.

Data gathering is based on the recommendations of the United Nations World Tourism Organization (UNWTO). Events with at least 4 hours of duration and 10 participants are entered. The methodology qualifies international events as ones where foreign delegates make up at least a fifth (20%) of the participants.

### 2022 in numbers:

The number of conferences in Tallinn was relatively stable in 2015–2019 with around 3,500–4,000 events every year. Due to restrictions related to the COVID-19 virus, the number of events in 2021 decreased by 70% compared to 2019 (1142 events).

In 2022, there was a 134% increase in the number of events compared to 2021 (2,674 events). However, 29% fewer conference events took place in 2022 compared to 2019.

In 2022, twice as many conferences took place across Estonia compared to the previous year (101% increase), incl. Tallinn +134%, Tartu County +9%, Pärnu County +47%, elsewhere +119%. Estonia hosted a total of 3,463 conference events (1,704 in 2021).

In 2021, 67% of all conference events took place in Tallinn, and by 2022 this number had grown to 77% (same as in 2019). 89% of international events took place in Tallinn (in 2021, Tallinn's share was 69%, in 2019 87%).

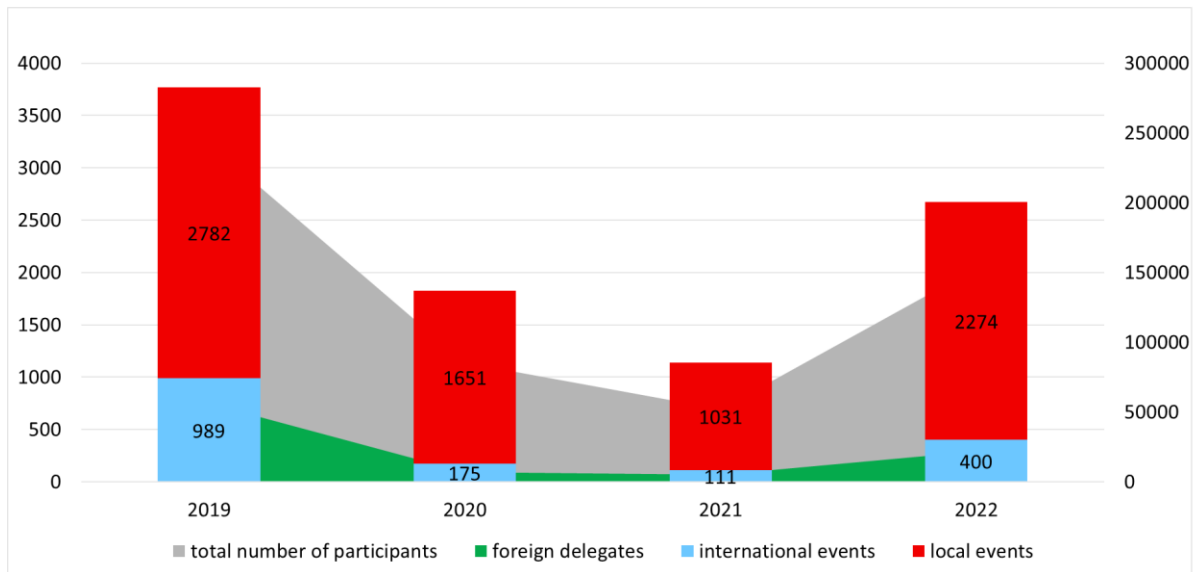
In 2022, 55 companies (50 in 2021) entered data into the conference event data collection environment meetings.ee across Estonia. 33 companies submitted data about conference events in Tallinn (31 in 2021). A list of the enterprises that have submitted data can be found in annex 1.

	Number of data providers in different regions <sup>1</sup>	
	2022	2021
<b>Tallinn</b>	33	31
<b>Tartu County</b>	9	9
<b>Pärnu County</b>	15	14
<b>Elsewhere in Estonia</b>	6	12

<sup>1</sup>One data provider may have organised events in several different regions during the year.

In 2022, after two years of decline, Tallinn’s conference events showed a growth trend again.

## Conference events in Tallinn 2019–2022



	All events	International events	Local events
<b>Number of events</b>	2,674	400	2,274
<b>Percentage</b>	100%	15%	85%
<b>Comparison to 2021</b>	+134%	+260%	+121%
<b>Comparison to 2019</b>	-29%	-60%	-18%

	All participants	Foreign delegates	Local participants
<b>Number of participants</b>	153,314	21,785	131,529
<b>Percentage</b>	100%	14%	86%
<b>Comparison to 2021</b>	+196%	+308%	+183%
<b>Comparison to 2019</b>	-37%	-61%	-29%

Conferences held in Tallinn are mostly short – 78% (2021 71%) of all events last 1 day. Four fifths of all local events last one day (+5% compared to 2021). The share of events lasting two or more days has decreased by 7% compared to 2021.

40% of all international events last for two or more days (in 2021, the same indicator was 62%).

In 2022 there were 208 events which lasted three or more days. In 2021 there were 120 such events.

The average duration of a domestic conference event was 1.3 days (1.6 in 2021). The average duration of an international event was 1.8 days (3.4 in 2021).

Duration	All events		International events		Local events	
	2022	vs 2021	2022	vs 2021	2022	vs 2021
<b>1 day</b>	78%	+156%	60%	+474%	81%	+138%
<b>2 days</b>	15%	+86%	22%	+222%	13%	+65%
<b>3 or more days</b>	8%	+164%	18%	+161%	6%	+166%

Similarly, to previous years, 95% of events in Tallinn in 2022 had up to 199 participants. 5% of events had more than 200 participants.

Number of participants	All events	International events	Local events
Up to 199 participants	95%	94%	96%
More than 200 participants	5%	6%	4%

In 2022 local and international events had on average 55 and 73 participating delegates respectively. In 2021, those same numbers were 42 and 80 (69 and 80 delegates in 2019).

Year	Average number of delegates		
	All events	International events	Local events
2022	57	73	55
2021	45	81	42
2020	47	69	45
2019	64	81	58

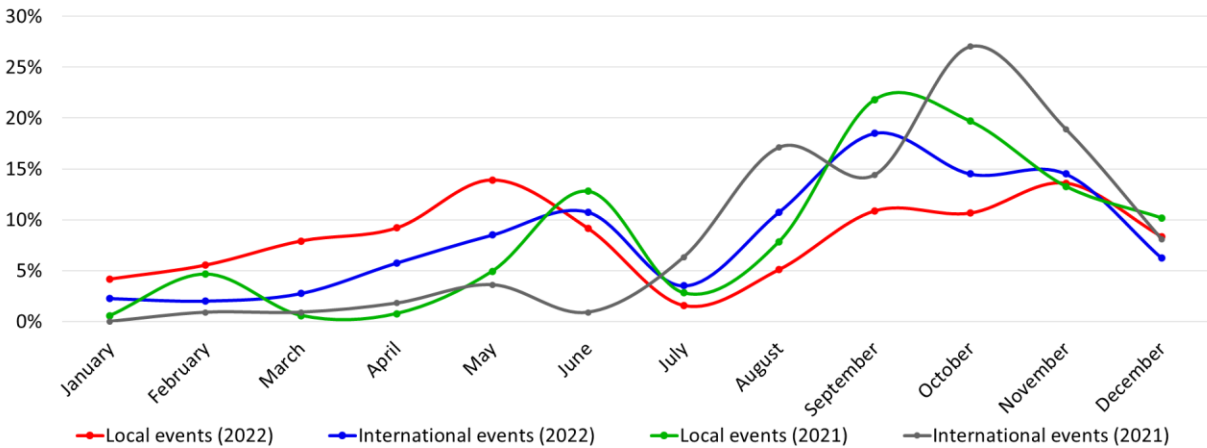
November and September had the biggest number of conferences (367 and 321 events respectively). The number of conferences was smallest in July (50).

May had the biggest number of local conferences – 316 events.

September had the biggest number of international conferences (74 events).

68% of all international events (meaning they have more than 20% foreign delegates) in 2022 took place in the period between July and December (272 events in total).

### Monthly distribution of local and international conference events in Tallinn: 2021 vs 2020



In 2021 more than half of the events were organised by public sector institutions, but in 2022 59% of events were organised by corporate companies.

With international events it was noticeable that while in 2021, 55% of events were organised by public sector institutions and 23% by associations, in 2022 almost three quarters (72%) were organised by corporate enterprises.

Organiser of the event	All events	International events	Local events
Associations	16%	11%	17%
Corporations	59%	72%	57%
Public sector	24%	17%	25%

### Economic impact of conference events

The Tallinn Tourism Department uses the Event Impact Calculator (EIC), an analytical instrument of the City Destinations Alliance, since October 2020. The EIC calculator measures the economic impact of the event and calculates its return on investment by tax revenue. The web platform and models for estimating economic impact have been created by Oxford Economics Company. The number of participants, duration and category of the event are entered into the calculator. Then, with the help of models, the economic impact of the conference is calculated, bringing out key indicators such as direct and indirect sales revenue for enterprises, impact on jobs, taxes and tax ROI<sup>2</sup>.

The Event Impact Calculator uses over 200 locations around the world to evaluate the success of an event. In Europe this is used by, for example, conference bureaus in Geneva, Oslo and Ljubljana.

Data about international events with at least 100 participants and a foreign delegation participation rate of 20% are entered into the EIC. The platform has data beginning from 2018.

Based on the previous four years, it can be said that one foreign participant in a conference brings Tallinn €870 on average, €413 of which is spent on housing, recreation, food and shopping. The rest is connected to organising the event, including rent for rooms, catering, support services etc. Tax revenue from hosting one foreign delegate is around €130.

This outcome is comparable to the results of a study<sup>3</sup> on conference delegates in small countries commissioned by EAS in 2018, which found that revenue to Tallinn from one foreign delegate is about €890 (that includes costs for the participant and for the event organiser).

Compared to 2020 and 2021, in 2022 all restrictions applied to the organisation of conference events gradually disappeared. Thanks to this, the number of international events with more than 100 participants more than doubled to 71 events (27 events in 2020 and 29 events in 2021). Compared to 2019, there were approximately 60% fewer international events with more than a hundred participants in 2022.

The difference in the number of foreign delegates has more than tripled (+223%) year-on-year, and the duration of the events has decreased by one day (4 days in 2021, 3 days in 2022). As a result, the total revenue of conference events increased by almost one and a half times (+143%) compared to 2021. In terms of total revenue, we have reached the level of 40% compared to 2019.

<sup>2</sup> ROI – Return of Investment

<sup>3</sup> The sample in the EAS study on conference delegates was only based on international events organised by professional associations. The number of events entered into the EIC is bigger and therefore more representative of events of various categories (i.e., events by corporations, associations and the public sector are represented).

	<b>Average 2018–2019</b>	<b>2021</b>	<b>2022</b>	<b>2022 vs 2021</b>
Number of international events (at least 100 participants)	176	29	70	+141%
Foreign delegates (at least 100 participants)	35,954	3,345	10,810	+223%
Total revenue from events <sup>4</sup>	€30,010,806	€4,425,482	€10,734,981	+143%
Average total revenue per event	€172,623	€152,603	€153,357	0%
Total government tax revenue related to events <sup>5</sup>	€4,566,025	€583,980	€1,444,425	+147%
Average tax revenue per event	€25,943	€20,137	€20,635	+2%

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<sup>4</sup> Total revenue from events consists of conference-related spending on housing, transport, catering, merchandising, recreation, rent for rooms and services by participants, organisers and organisations involved in exhibitions.

<sup>5</sup> Total government tax revenue related to events consists of value-added tax (VAT), VAT on housing, VAT on catering establishments, real estate tax, personal income tax, corporate income tax and other taxes.

## Summary

In 2022, the restrictions related to the COVID-19 virus were lifted and the amount of conference events started to increase again in Tallinn. Compared to the previous year, the number of conference events increased by +134%, but is still 30% short of the 2019 level. International events (+260%, local events +121%) and foreign delegates (+308%, local participants +183%) grew the most. However, the local events sector has recovered the best, with only an 18% decrease from 2019 (29% of participants). The recovery of international events and participants was at a rate of 40% in 2022.

Just like in 2021, 68% of all international events took place in the second half of the year in 2022, as the first half was still overshadowed by various restrictions and instability due to the war in Europe.

In 2021 more than half (55%) of the conference events were organised by public sector companies but in 2022, private companies organised more events (57%), as they had in previous years (65% in 2019).

The conference events held in 2022 were again comparable in length to the events in 2020 and earlier years. Local events lasted an average of 1.3 days (vs 1.6 days in 2021) and international events averaged 1.8 days (vs 3.4 days in 2021). This too proves that the sector is recovering and returning to its normal rhythm.

For international events, an average of 73 delegates participated in one event (81 delegates in 2021), and for local events, the number of delegates is again on the upward trend – 55 delegates (42 delegates in 2021).

More than twice as many international events with a hundred or more participants took place compared to the previous year (70 vs 29 in 2021). As a result, the expenses made in Tallinn also increased and almost one and a half times more revenue was brought to the city – 10.7 million euros (+143%).

In 2022, international events with over 100 participants contributed 35% of the average total and tax revenue of 2018–2019 in Tallinn (15% in 2021).

In summary, it can be said that in 2022, Tallinn's conference events sector turned on the upward trend again and the recovery has clearly begun. The events were more similar in duration and size to the ones in 2019. In terms of the number of events, the sector recovered to the level of 70% and the number of participants to 63% of 2019. Compared to 2021, the share of international conferences and foreign delegates has recovered particularly well. As a result of that, total revenue to Tallinn from international events with more than 100 participants was 10.7 million euros, more than twice the amount in 2021.

The overview was written by and more information can be asked from:

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## Annex 1. Enterprises who submitted data to the meetings.ee database regarding 2022 conference events

Alexela Concert Hall	Tallinn TV Tower
Baltic Travel Group	Tallinn Teachers' House
CWT Estonia	Tallinn University Conference Centre
Estonian National Museum	V Spa Hotel
Energy Discovery Centre	Vanemuise Concert Hall
Estonia Resort Hotel & SPA	Villa Ammende
Georg Ots Spa Hotel	Villa Andropoff
GoHotel Shnelli	Villa Wesset
Hedon Spa & Hotel	Von Stackelberg Hotell Tallinn
Hilton Tallinn Park Hotel	
Hotel Euroopa	Total: 55
Hotel Lydia	
Hotel Ülemiste	
Ice Age Centre	
Kadaka Conference Centre	
Klaara-Manni Holiday and Conference Centre	
Pierre Chocolaterie	
Conference Masters	
Tallinn Creative Hub	
Kumu Art Museum	
Lepanina Hotel	
Maria Farm	
Nordic Hotel Forum	
Ojako Tourism Farm	
Original Sokos Hotel Viru	
Park Inn by Radisson Meriton Tallinn	
Pernova Nature House	
Profexpo	
PROTO Invention Factory	
Publicon	
Pärnu Bay Golf Links	
Pärnu Hotel	
Pärnu Concert Hall	
Radisson Blu Hotel Olümpia	
Radisson Collection Hotel Tallinn	
Reiser	
Reisiekspert Conference Expert	
Unibet Arena	
Schlössle Hotel	
SPA TOURS OÜ	
Strand SPA & Conference Hotel	
Swissotel Tallinn	
Tallink City Hotel	
Tallink SPA & Conference Hotel	
Tallinn Zoo	
Tallinn University of Technology	