

Overview of Conferences in Tallinn 2021

The number of conferences in Tallinn was relatively stable in 2015–2019 with around 3,500–4,000 events every year. In 2020 the number of events decreased by 52% (a total of 1,826 events took place). In 2021 the number decreased yet again by 37% (1,142 events).

In Estonia as a whole, the number of conference events decreased by 31% in 2021, including by 37% in Tallinn, 6% in Tartu, 23% in Pärnu County, 9% elsewhere. Estonia hosted a total of 1,704 conference events (2,495 in 2020).

In 2019, 77% of all conference events took place in Tallinn, but by 2021 this number had dropped to 67%. The drop was even greater when it comes to international events—in 2019, 87% of international events took place in Tallinn. In 2021, only 69% did.

In 2021 various restrictions were placed on conference events, as in 2020. In spite of that, the number of international events with more than 100 participants remained at levels similar to 2020—in 2020, 27 such events took place, while in 2021, there were 29 (188 events in 2019).

2021 in numbers:

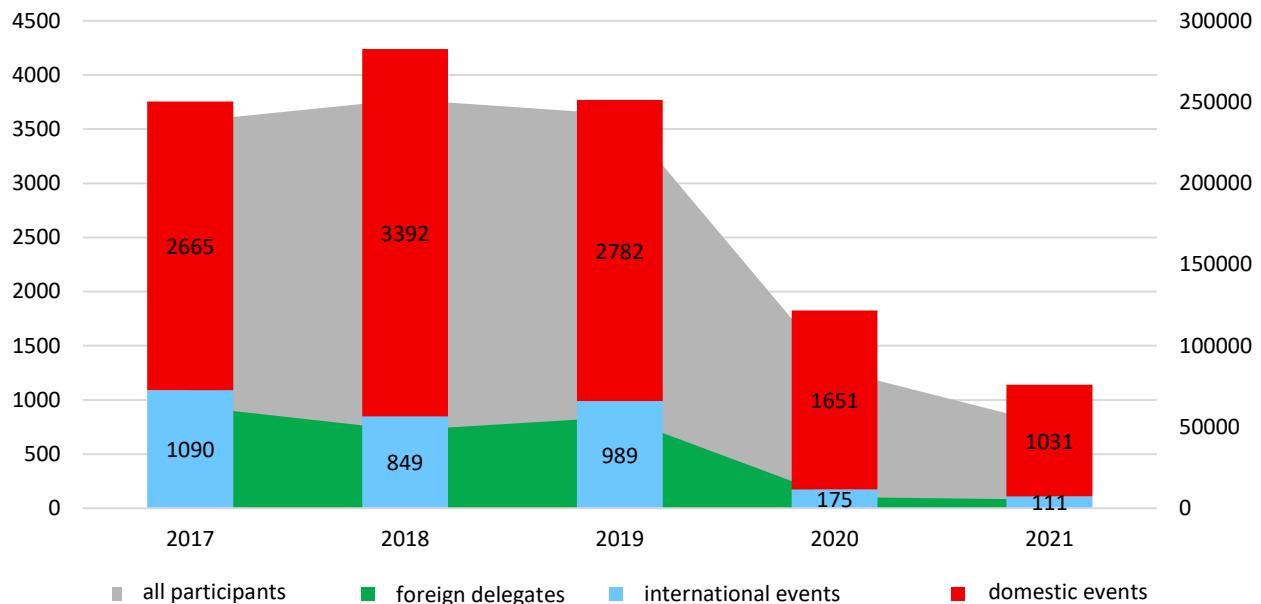
Data on conference events are collected to answer queries about location investments, development projects and infrastructure improvement; to provide input data used to create rankings for international conference locations; to evaluate events taking place in Tallinn, their scope and impact.

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 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.

31 enterprises submitted data about Tallinn conference events in 2021 (35 in 2020). 50 enterprises submitted data to the meetings.ee database in Estonia as a whole (58 in 2020). A list of the enterprises that have submitted data can be found in Annex 1.

Tallinn conference events 2017–2021



	All events	International events	Domestic events
Number of events	1,142	111	1,031
Percentage	100%	10%	90%
Comparison to 2020	-37%	-35%	-38%
Comparison to 2019	-70%	-88%	-63%

	All participants	Foreign delegates	Domestic participants
Number of participants	51,828	5,345	46,483
Percentage	100%	10%	90%
Comparison to 2020	-39%	-22%	-41%
Comparison to 2019	-79%	-90%	-75%

Information on events is collected in the meetings.ee database. The events are divided into three categories—on-site events, hybrid events (involving both on-site and online participants) and online events (participation only through an online platform).

The data on on-site and hybrid events have been added up in the present summary, since there are participants on-site in both cases. Hybrid events also have participants online.

At least 125 online events took place in Tallinn in 2021 (127 in 2020) in which at least 147,900 people participated on an online platform (growth of 79% in comparison with 2020). The number of online participants in hybrid events was about 13,100. Therefore, around 161,000¹ people were involved in

¹ Entering the exact number of participants in online events is a challenge for those who submit data since many are unable to receive the information from event organisers. One can assume that online participation is greater in reality.

events taking place in Tallinn through online channels (growth of 85%). Three times more people participated in online conferences than in ones on-site.

The conference events in Tallinn are mostly short—71% of all events last one day—but the percentage of events lasting two or more days has risen by 11% compared to the previous year.

Three-fourths of domestic events lasted one day.

62% of international events lasted two or more days (a quarter of them even more than four days).

In 2021 there were 120 events which lasted three or more days. In 2020 there were 74 such events.

The average duration of a domestic conference event was 1.6 days (1.2 in 2020). The average duration of an international event was 3.4 days (1.9 in 2020).

Duration	All events		International events		Domestic events	
	2021	vs. 2020	2021	vs. 2020	2021	vs. 2020
1 day	75%	-46%	38%	-61%	75%	-44%
2 days	18%	-20%	24%	-31%	18%	-18%
3 or more days	8%	+66%	38%	+45%	8%	+73%

Similarly to previous years, 97% of events in Tallinn in 2021 had up to 199 participants.

3% of events had more than 200 participants.

In 2021, domestic and international events had on average 42 and 80 participating delegates respectively. In 2020, those same numbers were 45 and 69 delegates (69 and 80 delegates in 2019).

	All events	International events	Domestic events
Up to 199 participants	97%	91%	97%
More than 200 participants	3%	9%	3%

In 2021 domestic and international events had on average 42 and 81 participating delegates respectively.

Year	Average number of delegates		
	All events	International events	Domestic events
2021	45	81	42
2020	47	69	45
2019	64	81	58

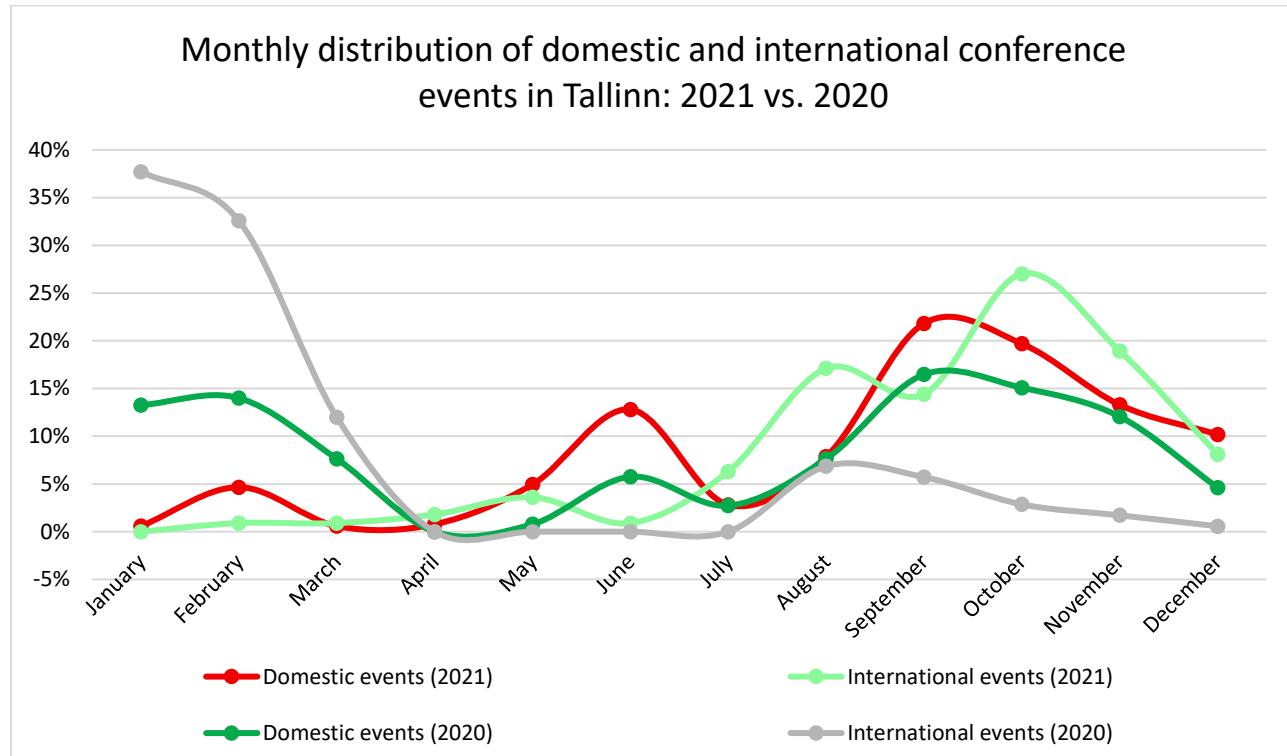
Unlike the previous year, when 60% of events were organised by corporate enterprises, 56% of events in 2021 were organised by public sector institutions.

It was noticeable with international events that while in 2020, 71% of events were organised by corporate enterprises, in 2021, 55% of events were organised by public sector institutions and 23% by associations (vs. 14% in 2020).

Organiser of the event	All events	International events	Domestic events
Associations	19%	23%	20%
Corporations	24%	22%	23%
Public sector	56%	55%	56%

September and October had the greatest number of conferences (respectively 242 and 233 events). January (6 events), March (7 events) and April (10 events) had the least amount of conferences. September had the greatest number of domestic conferences—225 events. October had the greatest number of international conferences (30 events).

NB! 77% of all international events (meaning they have more than 20% foreign delegates) in 2021 took place in the period between August and November (86 events in total).



Economic impact of conference events

The Tallinn Tourism Department uses the Event Impact Calculator (EIC), an analytical instrument of European Cities Marketing (ECM), 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. 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, tax ROI².

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

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

² ROI – Return on Investment

Based on the previous four years, it can be said that one foreign participant in a conference brings Tallinn €890 on average, €415 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 study³ on conference delegates in small countries commissioned by Enterprise Estonia (EAS) in 2018, which found that revenue to Tallinn from one foreign delegate is about €890 (that includes spending by the participant and by the event organiser).

In 2021 the number of international events with more than 100 participants decreased by 90% in comparison with 2019, but was equal in comparison with 2020. In 2021, however, these events brought in twice as much revenue as they did in 2020. While the difference in the number of foreign delegates was not remarkably greater compared to the previous year (+15%), the duration of the events had doubled in essence (an average of 4 days in 2021 vs. an average of 2 days in 2020). Therefore, almost the same amount of foreign delegates brought in significantly more revenue because they stayed at the destination for longer.

	Average 2018–2019	2020	2021	Change 2021 vs. 2020
Number of international events (at least 100 participants)	176	27	29	+7%
Foreign delegates (at least 100 participants)	35,954	2,911	3,345	+15%
Total revenue from events ⁴	€30,010,806	€2,152,526	€4,425,482	+106%
Average total revenue per event	€172,623	€79,723	€152,603	+91%
Total government tax revenue related to events ⁵	€4,566,025	€306,404	€583,980.29	+91%
Average tax revenue per event	€25,943	€11,348	€20,137,25	+77%

³ The sample in the EAS study on conference delegates only contained international events by associations. The number of events entered into the EIC is greater and therefore the sample is more representative of events of various categories (i.e. events by corporations, associations and the public sector are represented).

⁴ 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.

⁵ 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

Similarly to 2020, the conference sector in Tallinn was strongly impacted by restrictions designed to prevent the spread of the COVID-19 virus in 2021. The number of conference events decreased by another 37% compared to the previous year. In comparison with 2020, domestic events and participants decreased by a bit more (respectively 38% and 41%). In comparison with 2019, the amount of conference events decreased by 70%, international events among them by 88%. The number of foreign delegates who reached Tallinn decreased by 90%.

Of special note is the fact that in 2021, 77% of all international events took place in the period between August and November when restrictions were less of a burden and one could see people were adapting to the new situation.

2021 is also different from previous years by more than half (55%) of the conference event organisers being public sector enterprises. Most of the event organisers in the previous years had been corporate enterprises (71% in 2020, 65% in 2019).

The conference events in 2021 were longer than in previous years—domestic events lasted 1.6 days on average (vs. 1.2 days in 2020) and international events 3.4 days on average (vs. 1.9 days in 2020).

On average, 81 delegates participated in international events, the same figure as in 2019, but in the case of domestic events that number is still falling—42 delegates in 2021 vs. 45 delegates in 2020 vs. 58 delegates in 2019.

The number of international events with 100 or more participants was essentially the same (27 vs. 29) but the events in 2021 were longer and lasted four days on average. As a result of that, spending in Tallinn increased and the city earned twice the revenue.

In 2021 international events with over 100 participants contributed 15% of the average 2018–2019 total and tax revenue in Tallinn (7% in 2020).

To summarise, 2021 had the smallest number of events out of the entire 21 years data has been gathered on Tallinn conference events. But the events that did take place were remarkably longer, which is positive, especially in the context of international events. The average number of participants in international events has also reached 2019 levels again (81 delegates). As a result of that, total revenue to Tallinn from international events with more than 100 participants was €4.4 million, more than twice the amount in 2020.

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 2021 conference events

Alexela Kontserdimaja	V Spa Hotel
Baltic Tours DMC	Vanemuise Concert Hall
CWT Estonia	Villa Ammende
DMC Estonia	Villa Andropoff
Dorpat Hotel & Convention Centre	Villa Wessel
Estonian National Museum	
National Library of Estonia	Total: 51
Energy Discovery Centre	
Estonia Resort Hotel & SPA	
GoHotel Shnelli	
Hedon Spa & Hotel	
Hilton Tallinn Park Hotel	
Hotel Euroopa	
Hotel Ülemiste	
Ice Age Centre	
Klaara-Manni Holiday and Conference Centre	
Tallinn Creative Hub	
Kumu Art Museum	
Lepanina Hotel	
Maria Farm	
House of the Blackheads	
Nordic Hotel Forum	
Ojako Holiday and Training Centre	
Original Sokos Hotel Viru	
Park Inn by Radisson Meriton Tallinn	
Profexpo	
PROTO Invention Factory	
Publicon	
Pärnu Hotel	
Pärnu Concert Hall	
Radisson Blu Hotel Olümpia	
Reisiekspert Conference Expert	
Royal Experience	
Saku Suurhall	
Schlössle Hotel	
Strand SPA & Conference Hotel	
Swissotel Tallinn	
Tallink SPA & Conference Hotel	
Tallinn Viimsi SPA	
Tallinn Song Festival Grounds (Tallinna Lauluväljak)	
Tallinn Zoo	
Tallinn University of Technology	
Tallinn TV Tower	
Tallinn University Conference Centre	
Tartu County's Health Sports Centre	