

Overview of Conferences in 2023

Foreword and methodology:

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 organize 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.

In addition to this summary, a comprehensive overview of the conferences that took place is available on the Tallinn Tourism Department's new [dashboard](#).

The number of data providers has declined over the years, which suggests a need to update the collection methodology in the long term. A list of the companies that submitted data can be found in Appendix 1.

Year	Number of data providers in Estonian	Change YoY
2019	62	
2020	58	-4,84%
2021	51	-10,17%
2022	55	7,55%
2023	48	-15,79%

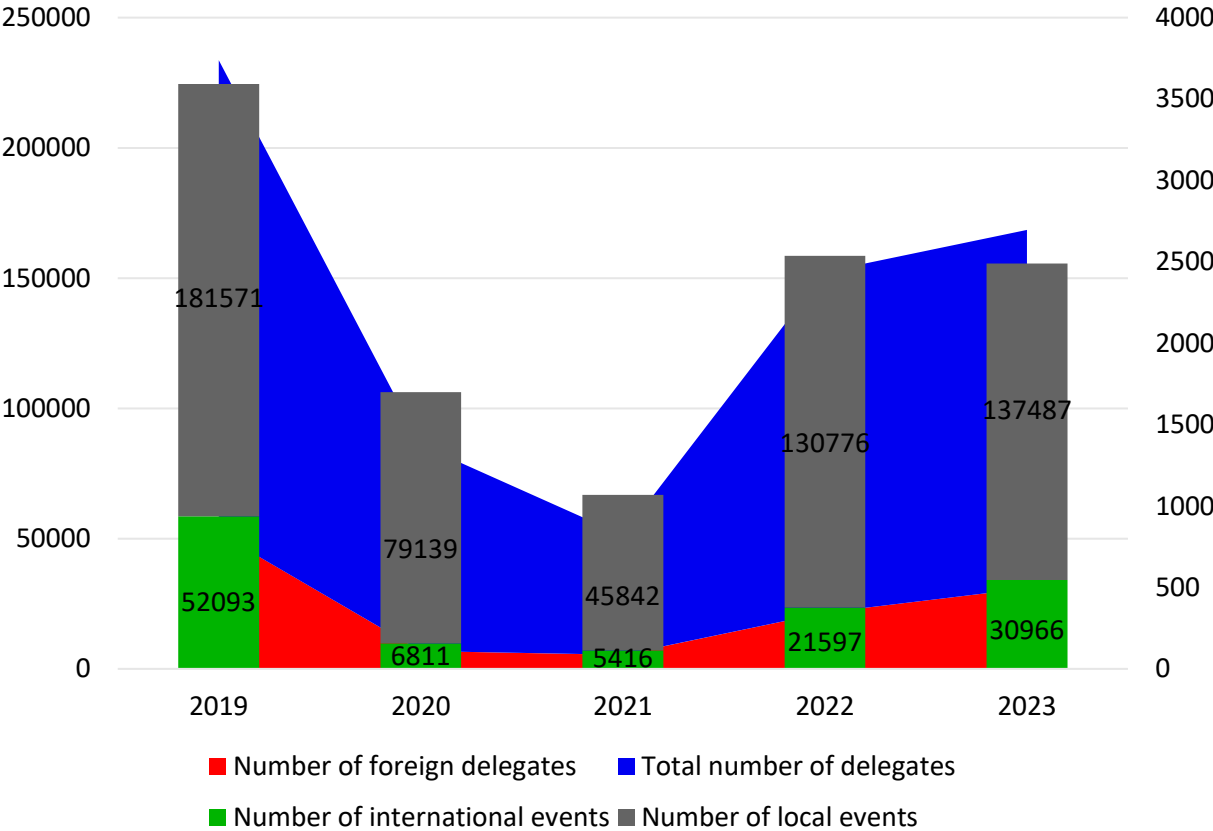
Key indicators for 2023:

In the post-pandemic period, the number of international conference events in Tallinn continues to grow. Compared to last year, their number increased from 376 to 546, which is a growth of 45%. However, this is still almost half of what it was in 2019 (58% of the pre-pandemic level has been reached). There was a slight decrease in the number of local events compared to last year – if there were 2160 events last year, then this year there were 1944. However, the decrease in the number of data providers by ~16% may have played a role in this indicator. Compared to the pre-pandemic level, the recovery of local events has been faster than that of international events, already reaching 73 percent of the previous peak level.

Based on the data set, the growth in the number of delegates compared to last year has been similar or greater, which indicates that there are more participants per event on average. The number of foreign

delegates is 30,966 (43% growth compared to the previous year). In terms of all delegates, of whom there were a total of 168,453, the growth compared to last year was +10.6%.

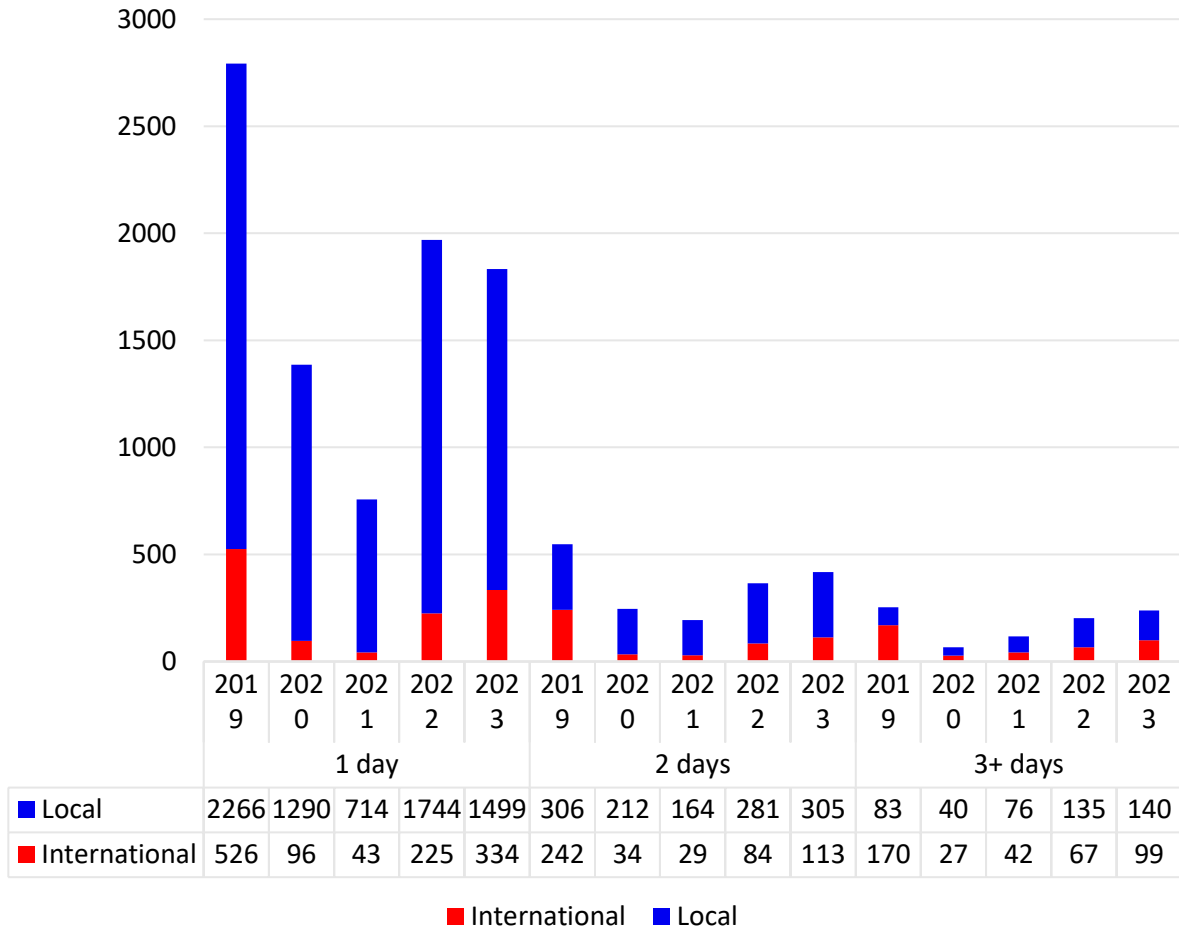
Events in Tallinn during 2019-2023



Year	Number of foreign delegates	Number of total delegates	Number of international events	Number of local events
2019	52093	181571	938	2655
2020	6811	79139	157	1542
2021	5416	45842	114	954
2022	21597	130776	376	2160
2023	30966	137487	546	1944

Compared to the previous year, the trend in the duration of events has not changed significantly - the majority continues to be events lasting 1 day. Compared to the previous year, the number of international events has increased in all duration-based categories, but the most in 1-day events (+48%) and longer events lasting 3 or more days (+46%). In the context of local events, their number has decreased only for short, i.e., 1-day events. The number of 2-day and 3+ day local events have increased (+9% and +4% respectively).

Number of local and international events in Tallinn by duration 2019-2023



Comparing the number of events based on the number of participants, in the case of small events (with less than 200 participants), the number of local events has decreased (-10%) but increased in the case of international events (+41%). In the case of large events with 200 or more participants, the trends were similar – the number of local events decreased (-10%), while the number of international events increased (+100%).

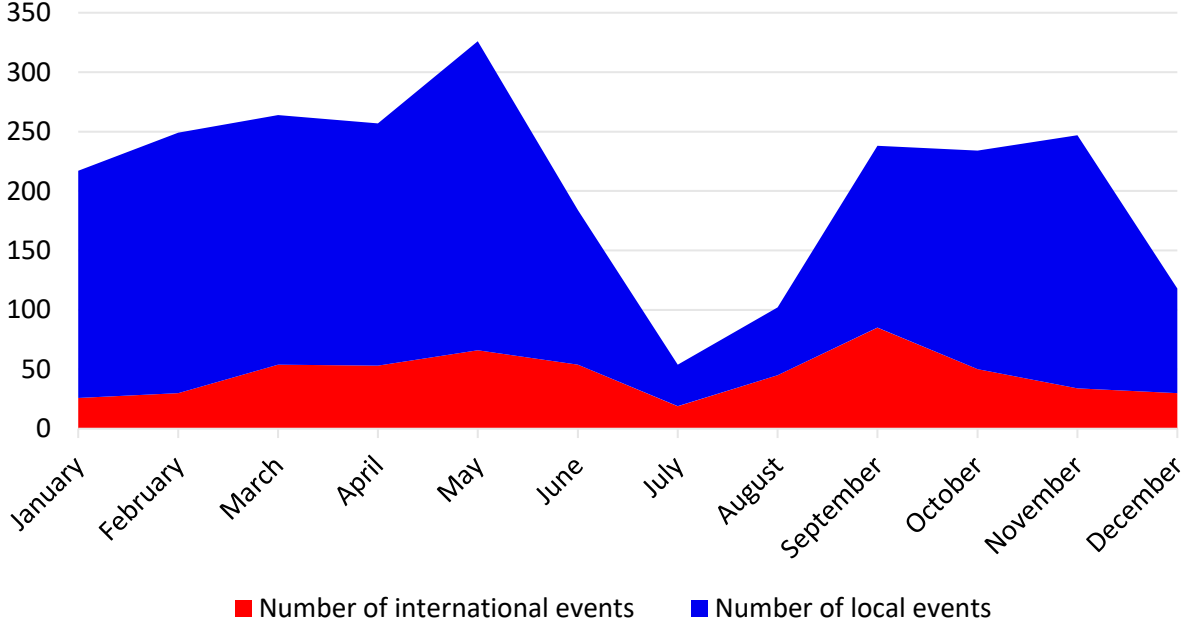
Year	Up to 199 participants		200+ participants	
	Local events	International events	Local events	International events
2019	2501	855	154	83
2020	1479	148	63	9
2021	927	104	27	10
2022	2062	349	98	27
2023	1856	492	88	54

Compared to last year, both international and local events have a larger number of participants on average. In the case of local events, the average number of participants has already exceeded the 2019 level. In the case of international events, this level was already exceeded last year, and this year the level has risen even higher.

Year	Average number of participants	
	Local events	International events
2019	60,65	77,45
2020	49,8	58,36
2021	44,19	79,87
2022	57,02	77,68
2023	63,37	82,89

In terms of the months in which the events take place, the usual trend applies, according to which their number is the lowest during the usual holiday months (July, December), due to large fluctuations in the number of local events. In the case of international events, the fluctuations (but also the absolute numbers) are smaller. The month with the largest number of international events was September.

Number of local and international events by months



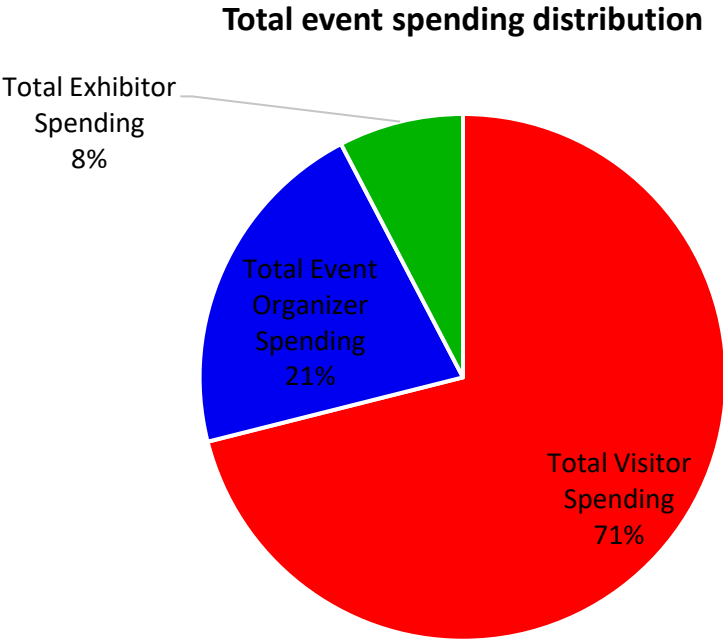
Economic impact of conference events:

Since October 2020, the Tallinn Tourism Department has been using the City Destinations Alliance's analytical tool, the Event Impact Calculator (EIC). The EIC calculator measures the economic impact of an event and calculates its return on investment by tax revenue. The web platform and models for assessing economic impact have been developed by the Oxford Economics Company. The calculator is used to enter the number of participants in the event, the duration of the event and the type of event, and then the economic impact of the conference is calculated using models, highlighting key indicators such as direct and indirect sales to businesses, impact on jobs, taxes, and tax ROI¹. The Event Impact Calculator is used by over 200 destinations worldwide to evaluate the success of events. In Europe, it is used, for example, by conference bureaus in Geneva, Oslo and Ljubljana.

¹ ROI – Return on Investment

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

The additional sales revenue generated for Tallinn's businesses from the 2023 events entered in the dataset was estimated to be €35,943,714. On average, this amounts to approximately €300,000 per event. However, this also includes the indirect impact through the increase in sales revenue between local companies, which cannot be directly considered as expenses made by delegates in Tallinn. Without this impact, the estimated total sales revenue growth is €20,854,631. Most of this comes from delegate spending (71%) and event organizer spending (21%).



In total, the events reflected in the dataset increased tax revenue collection by an estimated €4,758,495 (based on both expenses directly related to the event and indirect effects, which increased the sales revenue of local businesses).

The dataset also includes 21 events that were funded with the support measure for international conferences (in the total amount of €200,706). The increase in tax revenue collected because of these events was estimated to be €1,195,064 and the total increase in sales revenue was €9,113,569. The conference support measure can therefore be considered successful, especially considering that the support measure also has other effects, such as dispersing the timing of conferences to the low season.

Summary:

In 2023, the recovery of event volume continued successfully. The number of events grew rapidly in the case of international events but remained at a similar level for local events. In terms of the number of delegates, growth was observed in both categories. The growth rate has decreased compared to last year (i.e., comparing the growth in 2023/2022 with the growth in 2022/2021), which indicates a slowdown in recovery. This is to be expected, considering that the local event organization sector has changed significantly, and the recovery of international events is taking place with a longer delay.

In terms of the duration of events, the trend remained like last year - most events lasted one day. The number of international events increased in all duration-based categories, but the most in 1-day events (+48%) and 3+ day events (+46%). The number of local events decreased only for short (1-day) events.

The number of small events (with less than 200 participants) decreased for local events (-10%) but increased for international events (+41%). In the case of large events (200+ participants), the number of local events also decreased (-10%), but the number of international events increased (+100%). Both international and local events had a larger number of participants on average.

The number of events was lowest during the traditional holiday months (July, December). The month with the largest number of international events was September.

According to the Event Impact Calculator (EIC), the additional sales revenue of 2023 events for Tallinn's businesses was estimated to be €35,943,714. On average, this amounts to approximately €300,000 per event. Without the indirect impact, the increase in sales revenue is €20,854,631. The events increased tax revenue collection by an estimated €4,758,495.

The increase in tax revenue from the 21 events funded with the support measure for international conferences was estimated to be €1,195,064 and the increase in sales revenue was €9,113,569. The conference support measure can therefore be considered successful.

In conclusion, it can be said that in 2023, the Tallinn conference event sector continued to recover and grow. The number of events increased, especially in terms of international conferences, and the number of delegates increased significantly. This led to an increase in the sales revenue and tax revenue of Tallinn's businesses.

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Appendix 1. Companies that submitted data on conference events held in 2024 to the Meetings.ee database

Alexela Kontserdimaja	Pärnu Bay Golf Links
Auto24ring	Pärnu Hotell
Baltic Tours DMC	Pärnu Kontserdimaja
Baltic Travel Group	Pärnu Muuseum
CWT Estonia	Pärnu Rannastaadion
DMC Estonia	Radisson Blu Hotell Olümpia
Dorpat Hotell ja Konverentsikeskus	Radisson Collection Hotel Tallinn
Eesti Rahva Muuseum	Rannahotell
Eesti Rahvusraamatukogu	Reisiekspert Conference Expert
Energia avastuskeskus	Royal Experience
Erinevate Tubade Klubi	Saku Suurhall
Estonia Resort Hotel & SPA	Schlössle Hotel
Estravel Baltcoming	SPA TOURS OÜ
Georg Ots Spa Hotel	Strand SPA & Konverentsihotell
GoHotel Shnelli	Swissotel Tallinn
Hedon Spa & Hotel	Tallink City Hotel
Hilton Tallinn Park Hotel	Tallink SPA & Conference Hotel
Hotell Euroopa	Tallinn Viimsi SPA
Hotell L'Ermitage	Tallinna Ettevõtlusameti turismiosakond
Hotell London	Tallinna Lauluväljak
Hotell Lydia	Tallinna Loomaaed
Hotell Ülemiste	Tallinna Tehnikaülikool
Jääaja keskus	Tallinna Teletorn
Kadaka Konverentsikeskus	Tallinna Õpetajate maja
Klaara-Manni Puhke- ja Seminarikeskus	Tallinna Ülikooli Konverentsikeskus
Kohvik Pierre	TalTech konverentsikeskus
Konverentsimeistrid	Tartu Konverentsibüroo
Kultuurikatel	Tartu Ülikool
Kumu Kunstimuuseum	Tartu Ülikooli Pärnu Kolledž
Lennusadam	Tartumaa Tervisespordikeskus
Lepanina Hotell	Tervise hotellide grupp
Maria talu	V Spaahotell
Mektory keskus	Vanemuise Kontserdimaja
Metropol Spa Hotel	Wasa hotell ja taastusravi
Mustpeade maja	Via Hansa DMC & PCO
Nordic Hotel Forum	Villa Ammende
Ojako puhke- ja koolituskeskus	Villa Andropoff
Original Sokos Hotel Viru	Villa Wesset
Park Inn by Radisson Central Tallinn	Von Stackelberg Hotell Tallinn
Park inn by Radisson Meriton Tallinn	
Pernova Loodusmaja	
Profexpo	
PROTO avastustehas	
Publicon	