

Visit **Tallinn**

Conference tourism in Tallinn 2018

Tallinn City Tourist Office & Convention Bureau

visittallinn.ee

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Introduction

Tallinn City Tourist Office & Convention Bureau of the Tallinn City Enterprise Department analyses the information on conferences held in Tallinn to:

- use the collected data to answer inquiries and advise on the investments, development projects, and infrastructure development of the destination;
- submit the statistics to European Cities Marketing (ECM), an organisation that unites European cities, and in turn, receive information on the position of Tallinn among other conference cities of Europe.

This summary provides an overview on conferences organised in Tallinn in 2018.

The first part of the overview is based on the economic statistics by Statistics Estonia, focusing on the structure, seasonality, and duration as well as the market share of work-related trips to Tallinn.

The second part of the overview focuses on conferences organised in Tallinn. The information is collected from meetings.ee, a national conference database by the Tallinn City Tourist Office & Convention Bureau . The overview reflects on the position of Tallinn as an Estonian conference location as well as the number, capacity, type, number of participants, locations, etc. of conferences held in Tallinn.

The third part gives an overview on the number of visits to websites targeted at conference organisers at www.visittallinn.ee, the Tallinn tourist information website.

Conference database meetings.ee

Companies who organise conferences in Tallinn have submitted data to the Tallinn City Tourist Office & Convention Bureau since 2001.

As of 2013, companies who organise conferences submit the data on the events to meetings.ee, a platform for conferences created by the Tallinn Convention Bureau, Estonian Convention Bureau, and Tartu Convention Bureau to assemble all the information concerning conferences in Estonia. The objective of meetings.ee is to collect high-quality data on conferences held in Estonia. The analysis and abstracts based on this data is used to make decisions on conferences and determine the position of Estonia as well as Estonian cities on the international conference market. The platform also enables users to assemble statistical reports and figures on the period that interests them most. All the information is collected based on the recommendations by the United Nations World Tourism Organisation (UNWTO) and the mapping focuses on events that last at least 4 hours and include at least 10 participants. According to the methodology, international events are conferences where at least one fifth (20%) of participants are foreigners.

Submitting information is voluntary. 47 companies submitted information on events organised in 2018; the mapping included an estimated amount of two thirds of all conferences organised in Estonia.

Work-related trips to Tallinn

The following overview is based on analysing the purpose of travels made by tourists who stayed in accommodation establishments of Tallinn. The source of the information is the 'Accommodation' category of Statistics Estonia, the only database to collect yearly information and monthly comparisons on the purposes and durations of overnight visits in Estonian (including Tallinn's) accommodation establishments.

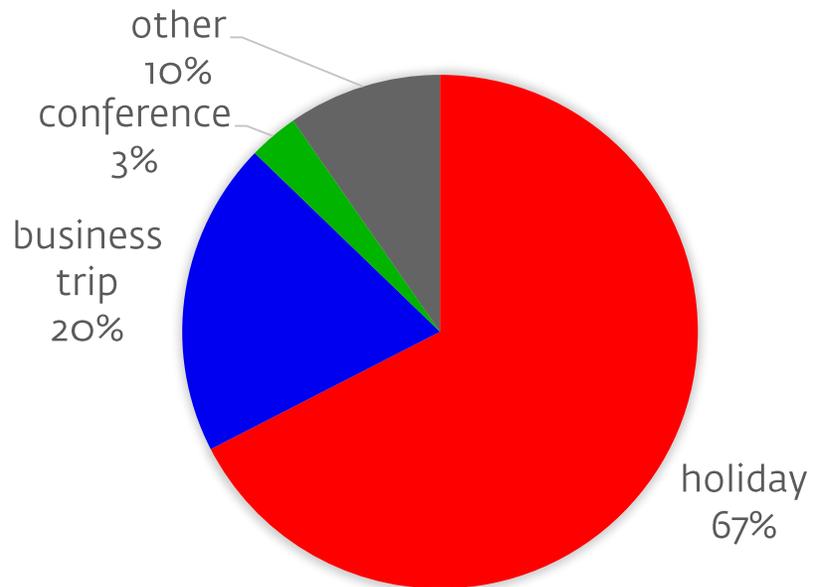
All travels are divided into three categories by purpose:

- Holiday trip – travelling with the purpose of resting, spending a yearly holiday or a weekend, visiting relatives and friends, or spending leisure time. Holiday trips are also holidays and trips assigned as bonuses with all expenses covered by an employer.
- Work-related trips – travels organised and paid for by an employer to perform occupational obligations, including participating in a congress, conference, meeting, or seminar. Work-related trips include business trips and conference trips. A conference trip means travelling for the purpose of participating at a conference, training seminar, or meeting organised by a private or public sector or professional associations. Travelling for a conference is considered a work-related trip. Travelling for other work-related reasons is considered a business trip.
- Other trips – travelling for purposes other than leisure or business (e.g. transit tourism, medical tourism, etc.).

Conference tourists are visitors who stay in accommodation establishments and travel for the purpose of participating at a conference, a training seminar, or a meeting. Business tourists are visitors who stay in accommodation establishments and travel to Tallinn for the purpose of meeting with a business partner, participate at a meeting, a trade fair, a sales presentation, etc.

Purpose of travel of tourists staying in accommodation establishments

Purpose of travel of tourists staying in Estonian accommodation establishments in 2018
N = 3,591,495 (+1%)

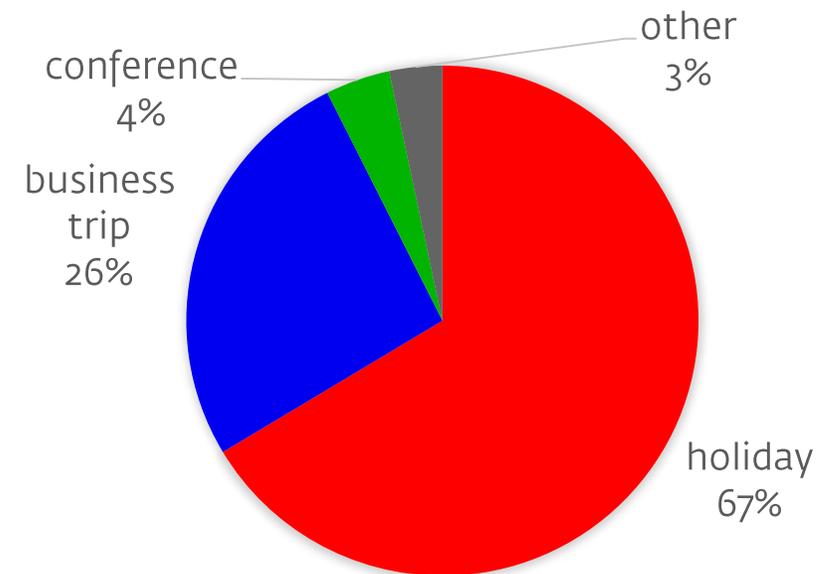


Source: Statistics Estonia

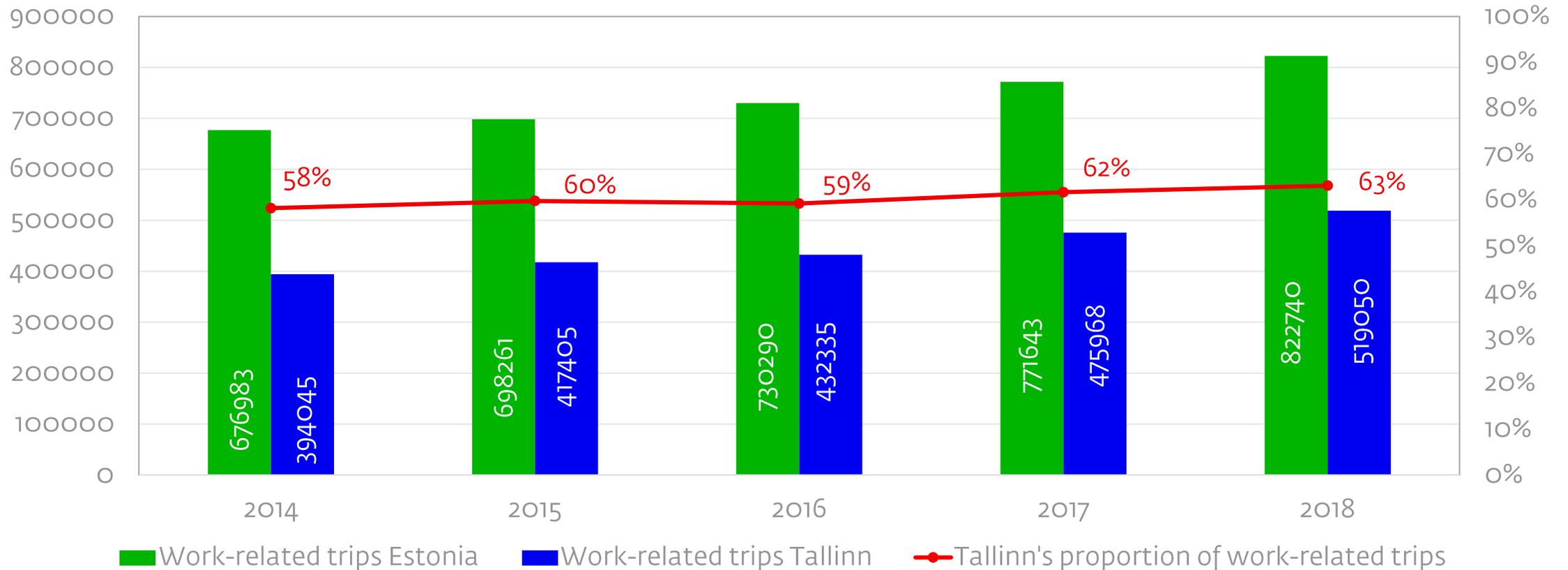
+48%



Purpose of travel of tourists staying in Tallinn's accommodation establishments in 2018
N = 1,715,008 (-1%)

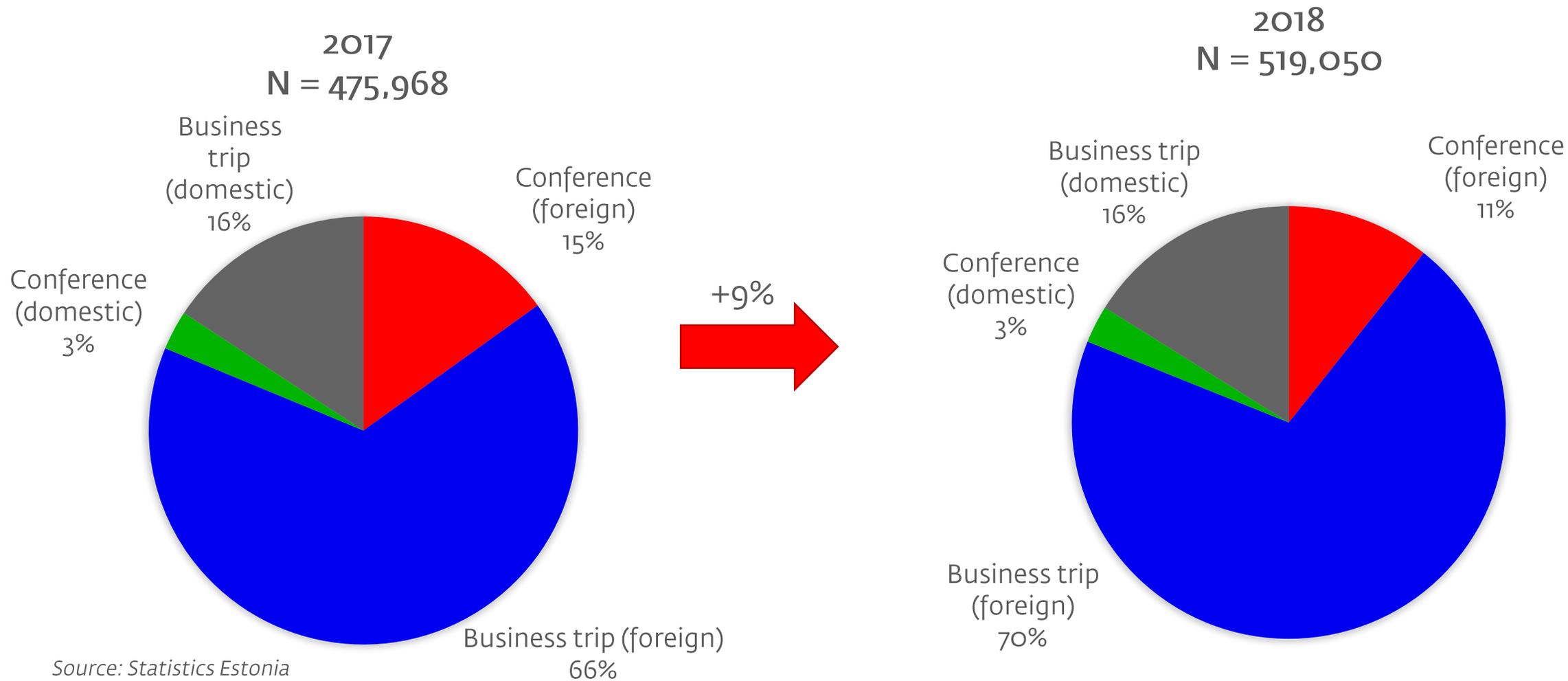


Tallinn's proportion of Estonia's work-related trips: 2014–2018

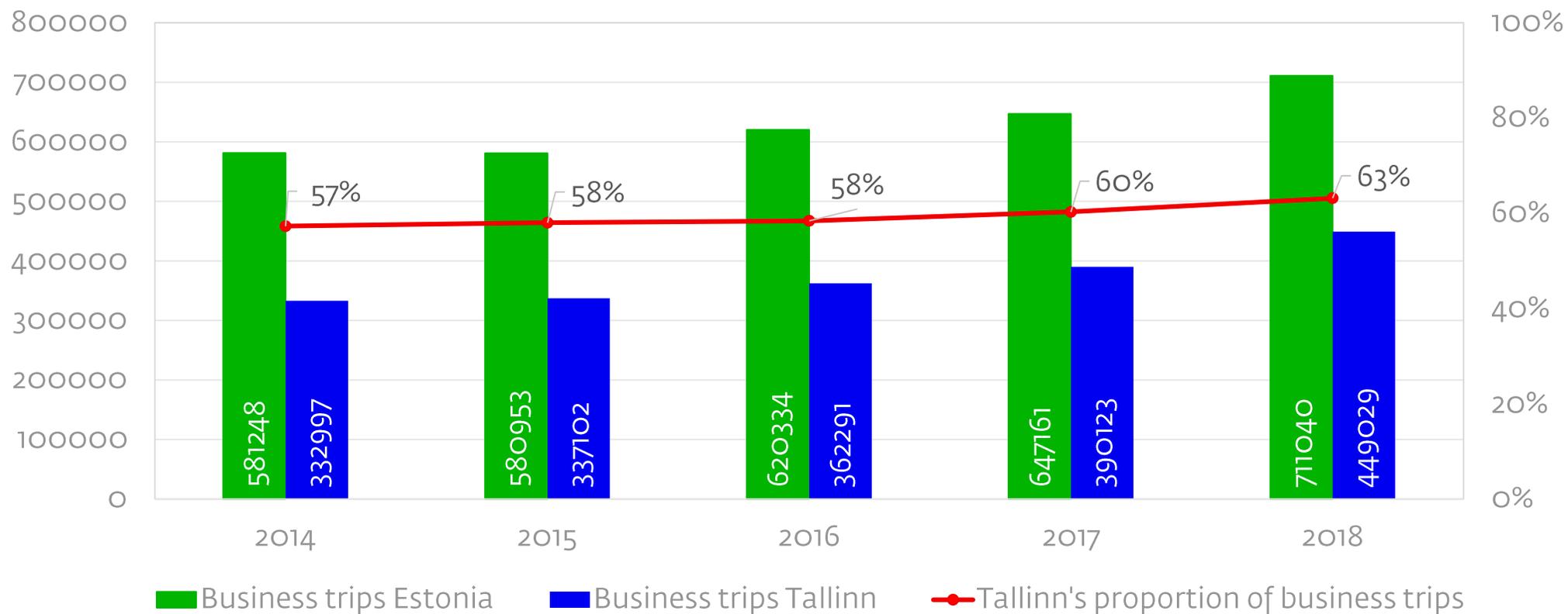


Source: Statistics Estonia

Distribution of work-related trips to Tallinn, 2018

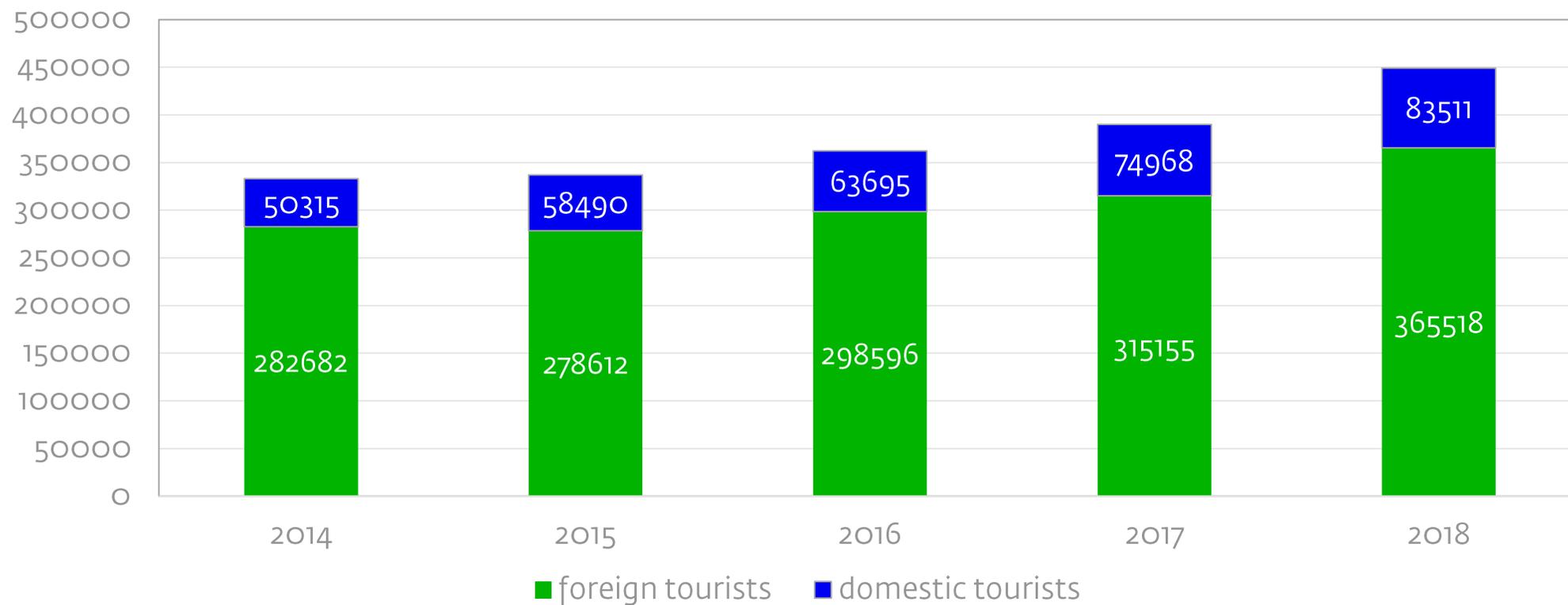


Tallinn's proportion of Estonia's business trips: 2014–2018



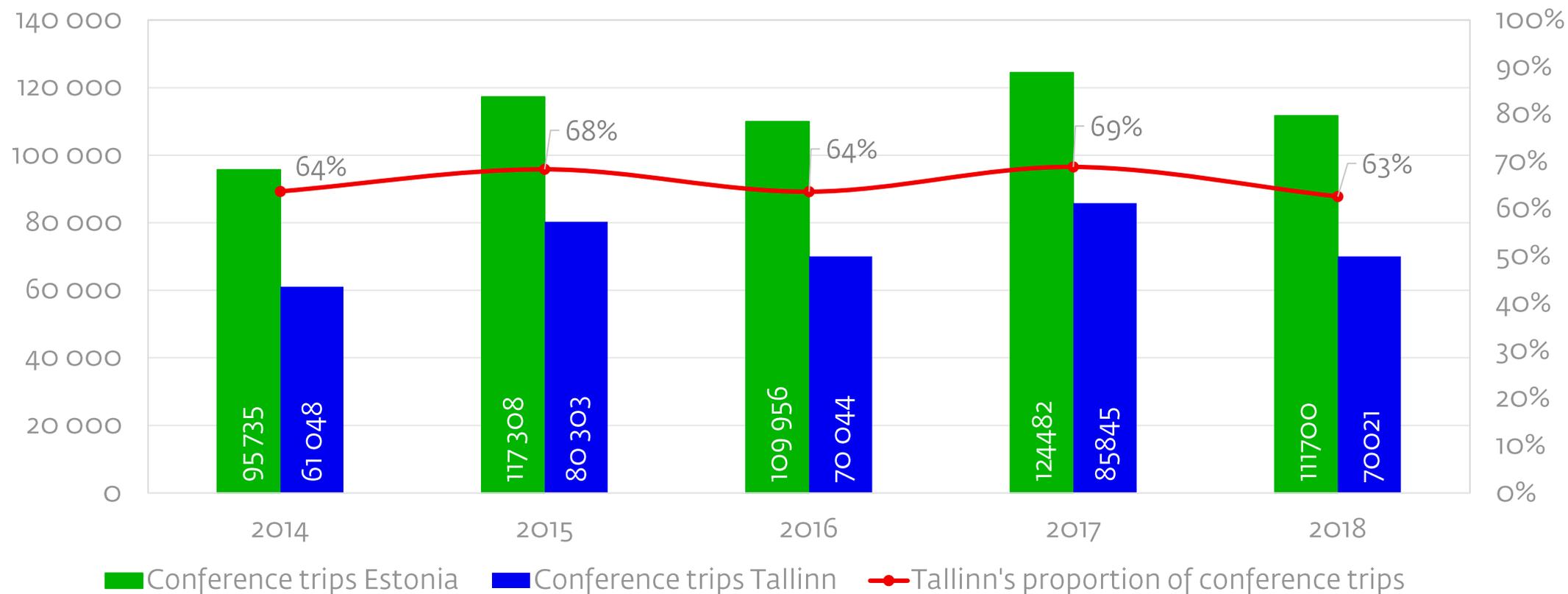
Source: Statistics Estonia

Business trips to Tallinn: 2014–2018



Source: Statistics Estonia

Tallinn's proportion of Estonia's conference trips: 2014–2018



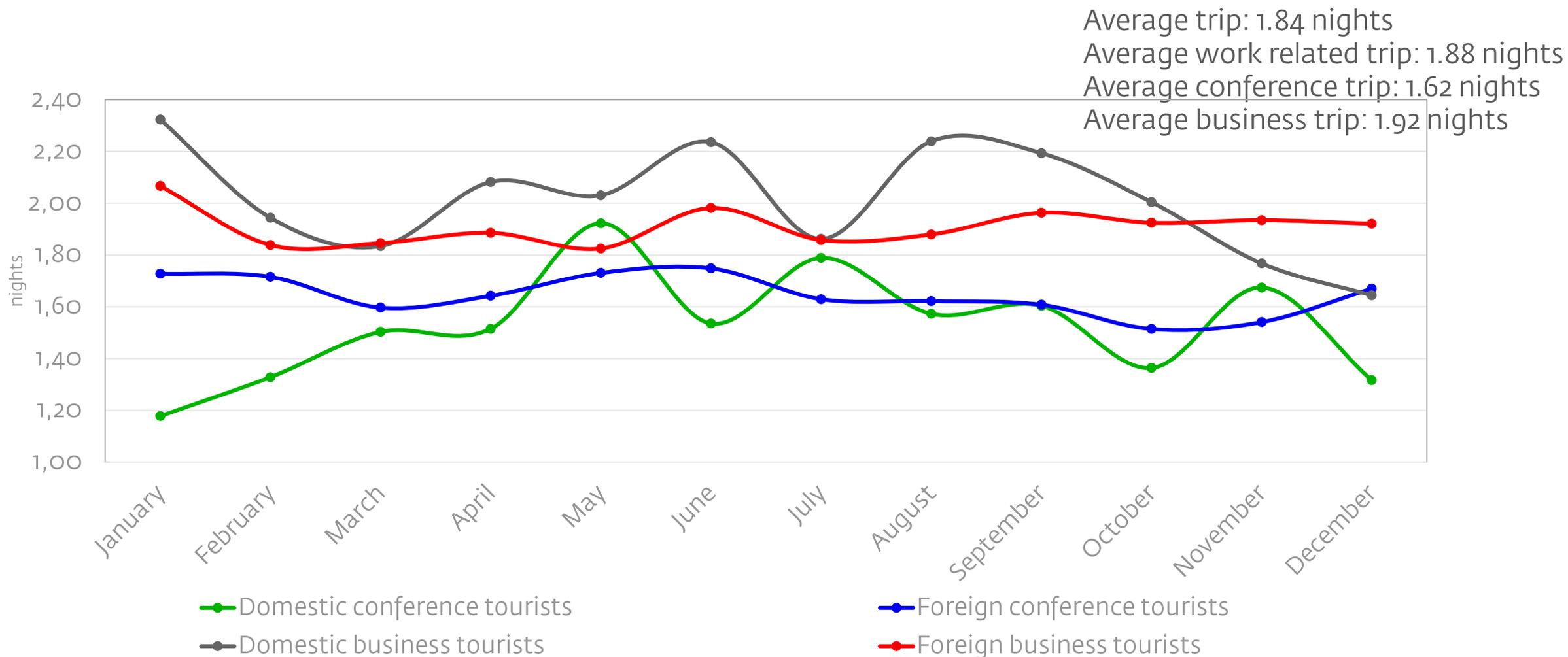
Source: Statistics Estonia

Conference trips to Tallinn: 2014–2018



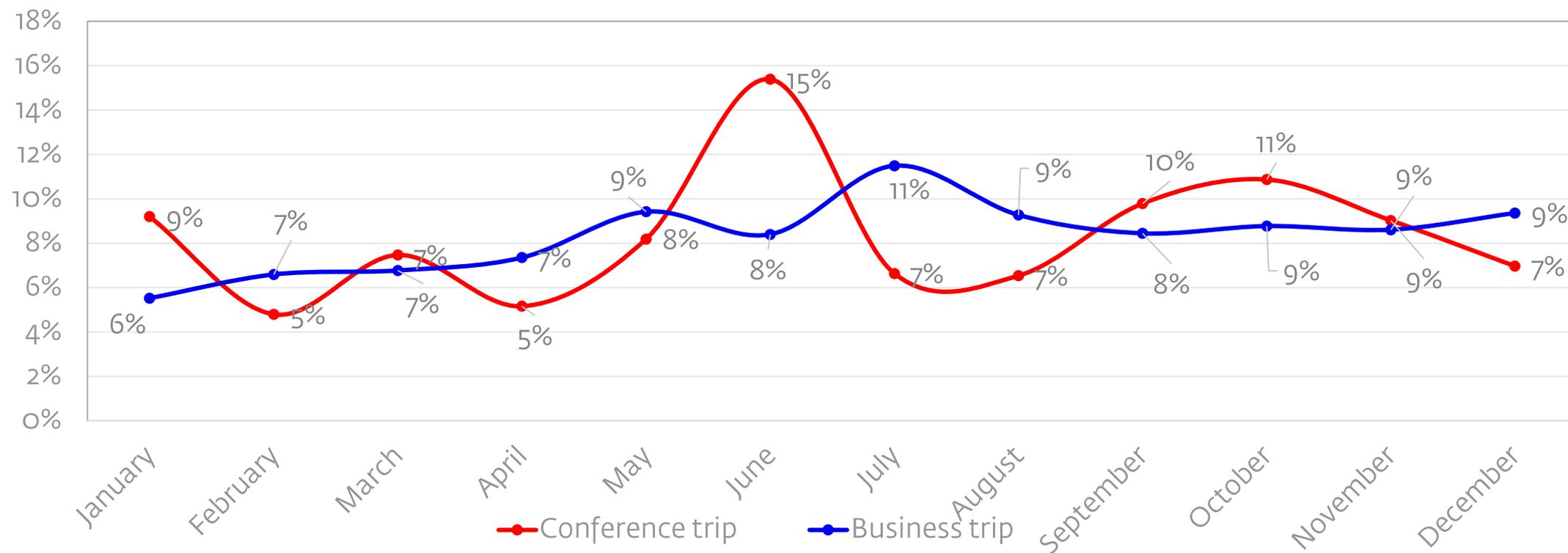
Source: Statistics Estonia

Duration of work-related trips to Tallinn, 2018



Source: Statistics Estonia

Monthly proportional distribution of Tallinn's work-related trips, 2018



Source: Statistics Estonia

Summary – work-related trips to Tallinn (1)

In 2018, Estonian accommodation enterprises housed 3.59 million tourists (+1%), of whom 48%, or 1.71 million (–1%) stayed in Tallinn. Of all the tourists accommodated in Estonia (3,591,495 people), 67% were here for leisure, 23% were on work-related trips (including to participate in conferences, seminars, or trainings) and 10% came here for other purposes.

1,715,008 tourists who stayed in Tallinn's accommodation establishments in 2018 were proportionally distributed as follows: 67% travelled for leisure (1,138,721 people), 26% travelled for business (449,029 people) 4% travelled for conferences (70,021 people), and 3% came here for other reasons (studies, health purposes, etc., a total of 57,237 people).

A business trip is a trip organised or financed by an employer for the purposes of performing occupational obligations (e.g. meeting with business partners, participating in meetings, trade fairs, sales presentations, etc.). A total of 711,000 business trips were made to Estonia (with an overnight stay in accommodation establishments).

In 2018, work-related trips to Tallinn comprised 63% of all visits to Estonia, and Tallinn has secured its importance as a destination for work-related trips over the previous years. 86% of all work-related trips to Tallinn were business trips and 14% were conference trips.

Compared to 2017, the number of work-related trips increased by nearly one tenth (+9%); the number of business trips increased (+15%) while the number of conference trips decreased (–18%). The number of work-related trips made by domestic tourists increased by 10% (including conference trips +3% and business trips +11%), whereas those made by foreign tourists increased by +9% (including a 23% decrease for conference trips and a 16% increase for business trips).

Summary – work-related trips to Tallinn(2)

In 2018, nearly 112,000 conference trips were made in Estonia, which is a 10% decrease compared to the previous year. Over 70,000 visitors travelled to Tallinn. The number of conference trips in Tallinn decreased by over a sixth (–18%). Of all the conference trips made in Estonia, those made to Tallinn comprised 63% (a proportional recession). This was mainly due to the remarkable growth in the previous year due to the events of the Estonian Presidency of the EU.

The number of conference trips made by foreign tourists in 2018 decreased by nearly a fourth (–23%), whereas those made by Estonian citizens decreased by 3%.

Of all the business trips to Tallinn, 81% were by foreign tourists; within the last five years, the proportion of business trips made by foreign tourists has remained relatively the same. The number of business trips by foreign tourists who stayed in accommodation establishments increased by 16%; the respective indicator for domestic tourists increased by 11%.

The average length of stay in Tallinn's accommodation establishments was 1.84 nights.

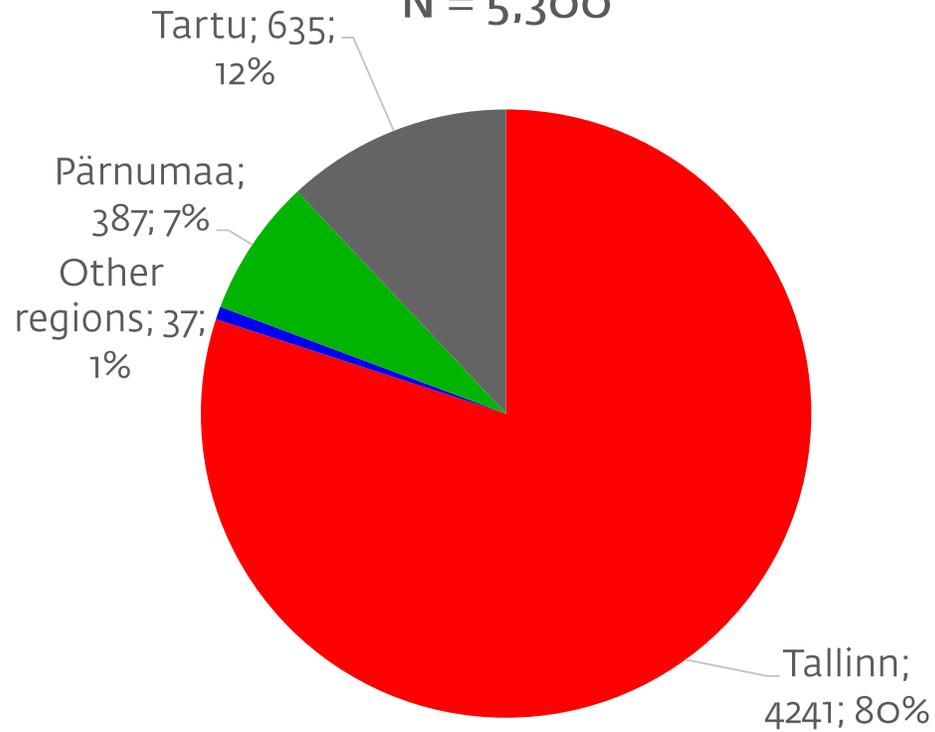
Work-related trips last longer compared to holiday trips. In 2018, the average overnight stay in Tallinn's accommodation establishments was 1.84 nights, which is an increase compared to the previous year (+2%). The average length of a work-related trip was 1.88 nights: conference trips lasted for 1.62 nights on average and business trips lasted for 1.92 nights on average.

Several-day visits to Tallinn were relatively short and seasonal. Two thirds of city visits were made from April to October and the highest number of city visits were made in July.

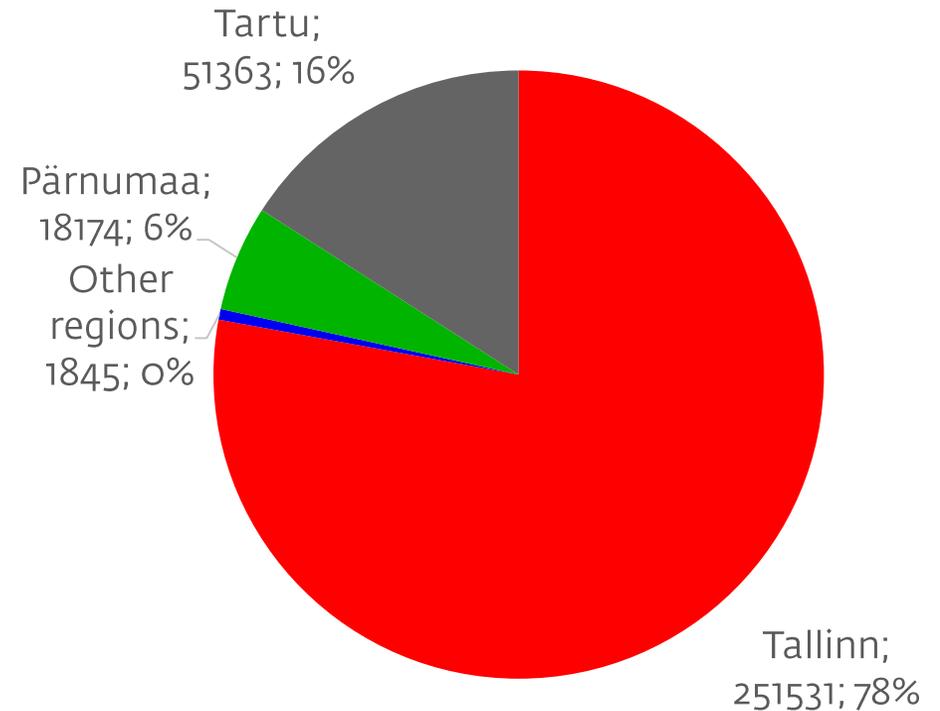
Work-related trips were significantly less seasonal compared to holiday trips. The highest number of conference trips were made from May to June and from September to October. In 2018, the highest number of conference trips was made in June.

Conferences in Estonia

Distribution of conferences in Estonia, 2018
N = 5,300



Distribution of conference delegates in Estonia, 2018
N = 322,913



Source: meetings.ee

Summary – conferences in Estonia

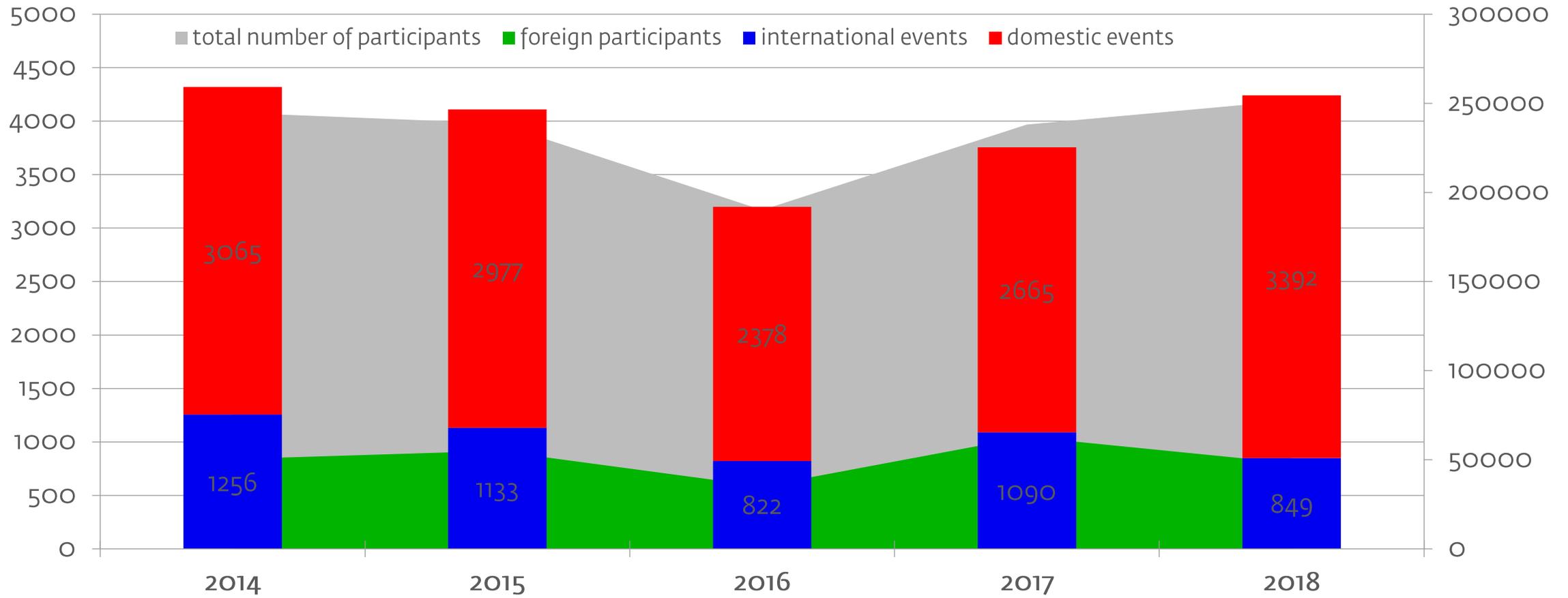
47 companies submitted data to the meetings.ee database on conferences organised in Estonia in 2018 (see Annex 1).

According to the submitted data, 5,300 conferences were held in Estonia in 2018 (an increase of 12% compared to the 4,748 organised in 2017). Of all the conferences held in Estonia, four fifths were organised in Tallinn (78%, or 4,241 conferences), 13% were held in Tartu, and 9% were held in other places around Estonia. International events comprised 22% (a total of 971) of all conferences held in Estonia, 87% of which were organised in Tallinn (849 events). Compared to 2017, the number of international conferences decreased by 20% (971 events, compared to the 1,220 organised the previous year).

In 2018, a total of 322,913 delegates participated in conferences in Estonia (+1%, compared to the 319,367 in 2017), of whom 17% (a total of 54,541) were foreigners. Of all the delegates, three quarters (78%, or 251,531 delegates) participated at conferences in Tallinn, whereas most of the foreigners (88%, or 48,065 delegates) took part in events held in Tallinn.

Compared to 2017, no significant proportional changes have taken place. Most of the conferences held in Estonia are in Tallinn and consequentially, most delegates stay in Tallinn. In a yearly comparison, the amount of conferences held in Estonia increased by 12%, whereas the number of domestic conferences increased by 23% and the number of international events decreased by 20%. Nationally, the number of conference participants increased by 1%, whereas the number of Estonians increased by 8% and the number of foreigners decreased by 24%.

Conferences in Tallinn: 2014–2018



Source: meetings.ee

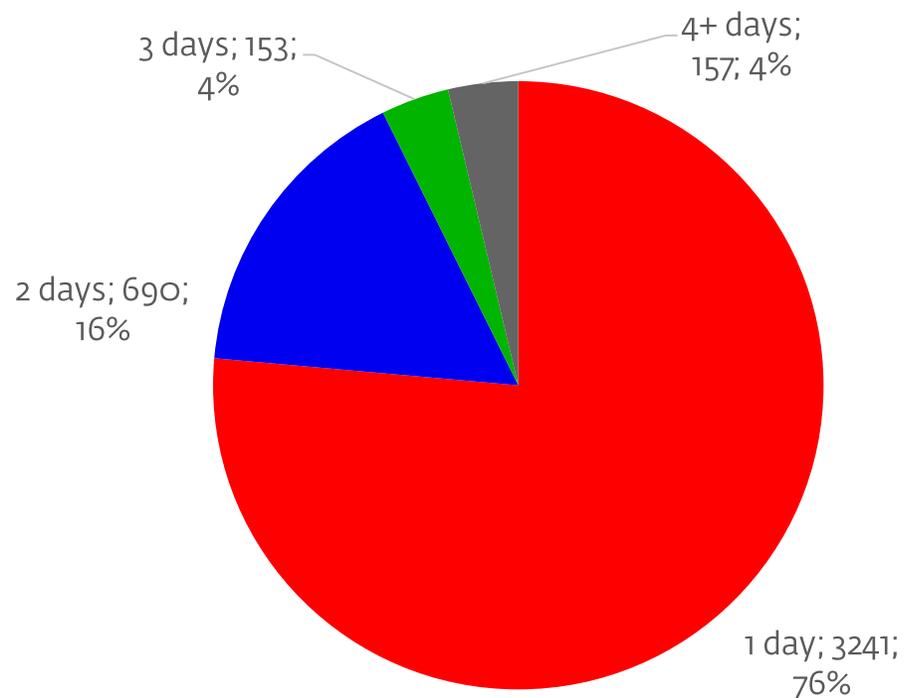
Distribution of conferences and delegates in Tallinn, 2018 (changes in comparison with 2017)

	Conferences		Foreign delegates		Domestic delegates		Total no. of delegates	
		Change 2017/2018		Change 2017/2018		Change 2017/2018		Change 2017/2018
Total no. of conferences	4,241	+13%	48,065	-23%	203,466	+16%	251,531	+6%
International events (more than 20% of delegates are foreign)	849	-22%	46,734	-22%	21,166	-4%	67,900	-17%
Domestic events	3,392	+27%	1,331	-54%	182,300	+19%	183,631	+18%

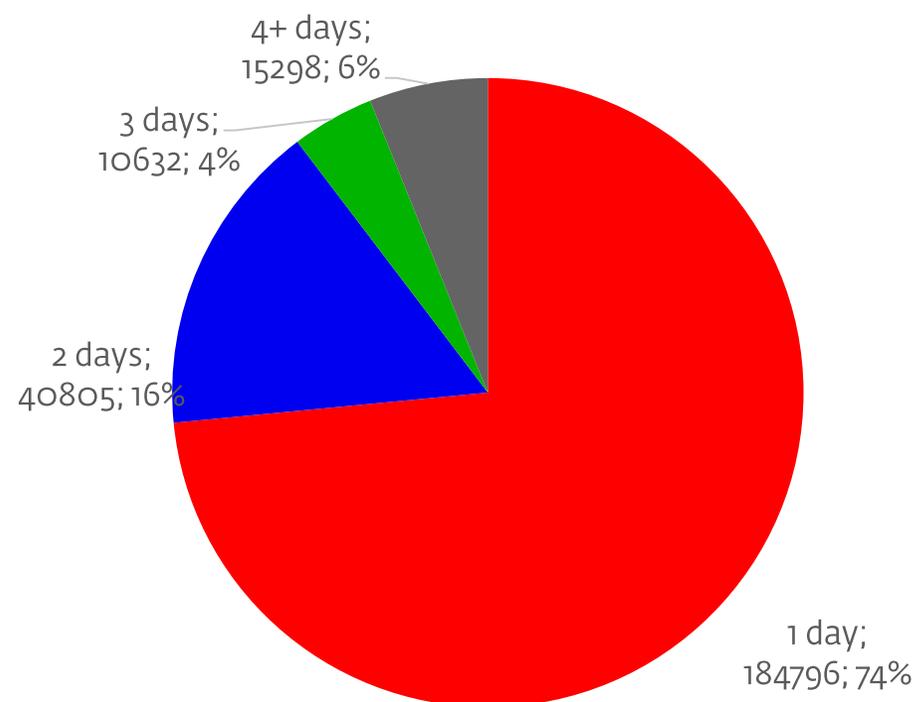
Source: meetings.ee

Duration of conferences in Tallinn, 2018

Duration of conferences in Tallinn, 2018
N = 4,241



Distribution of conference delegates by the duration of the events
N = 251,531



Source: meetings.ee

Distribution of conferences by the duration of the events, 2018 vs 2017

	1 day			2 days			3 days			4+ days		
	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18
Total number of events	2,763	3,241	17%	667	690	3%	212	153	-28%	113	157	39%
Domestic events	2,239	2,810	26%	313	421	35%	66	86	30%	47	75	60%
International events	524	431	-18%	354	269	-24%	146	67	-54%	66	82	24%

Source: meetings.ee

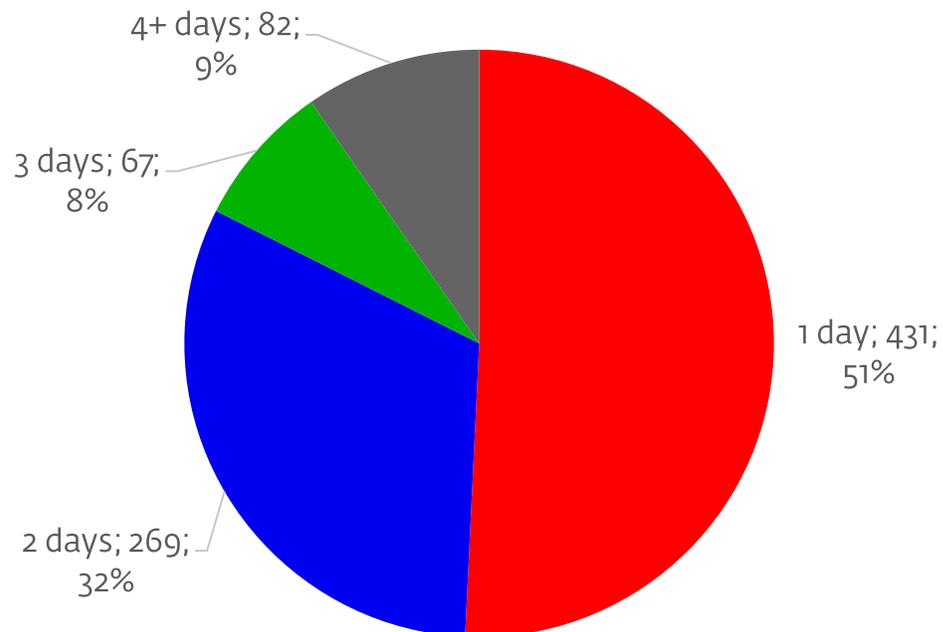
Distribution of conference delegates by the duration of the events, 2018 vs 2017

	1 day			2 days			3 days			4+ days		
	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18	2017	2018	Change 17/18
Total no. of delegates	156,010	184,769	18%	45,233	40,805	-10%	25,591	10,632	-58%	11,310	15,298	35%
Domestic delegates	135,492	167,347	24%	25,442	25,471	0%	9,854	5,452	-45%	4,551	5,196	14%
Foreign delegates	20,518	17,449	-15%	19,791	15,334	-23%	15,737	5,180	-67%	6,759	10,102	49%

Source: meetings.ee

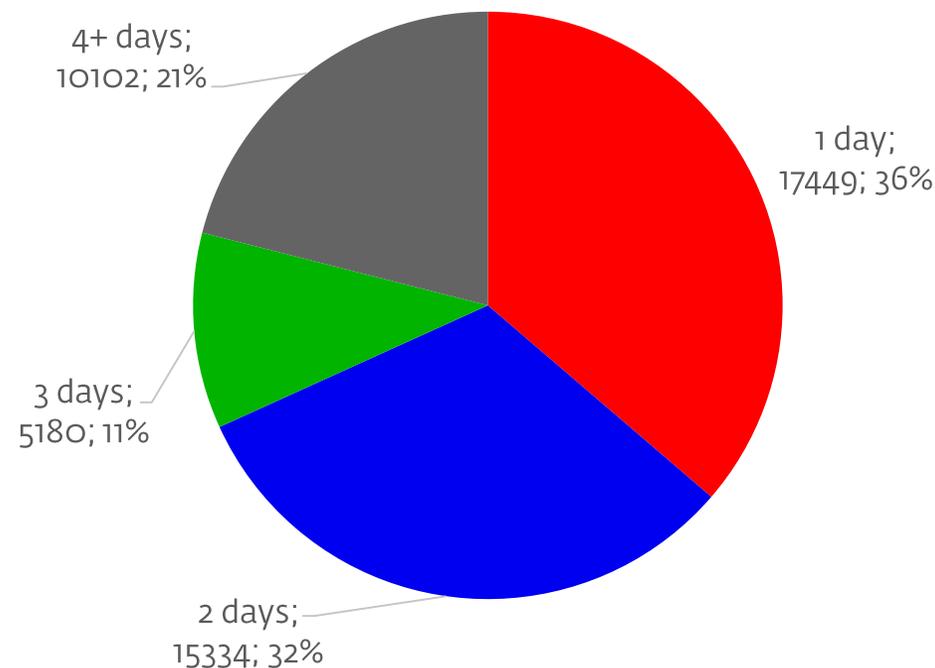
Duration of international conferences

Distribution of international conferences according to the duration of the events, 2018
N = 849

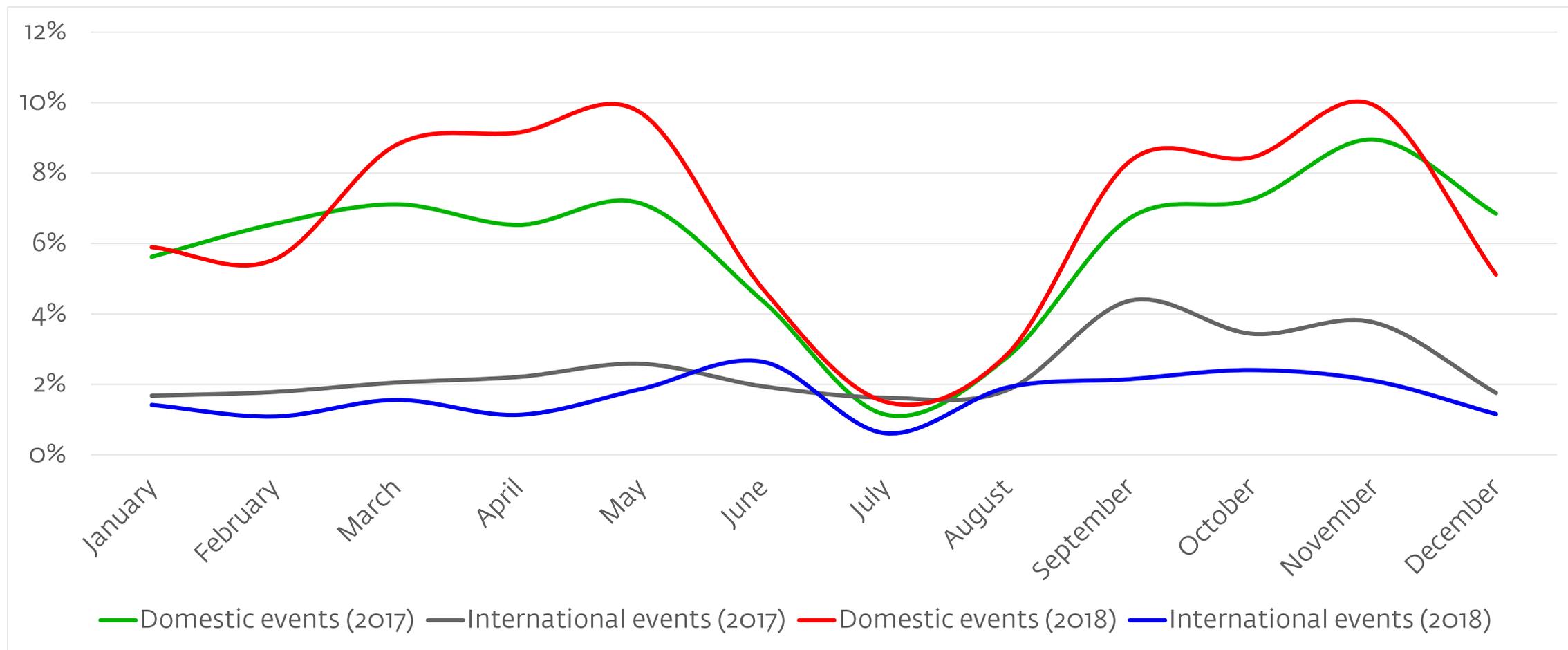


Source: meetings.ee

Distribution of foreign delegates according to the duration of the events, 2018
N = 48,115

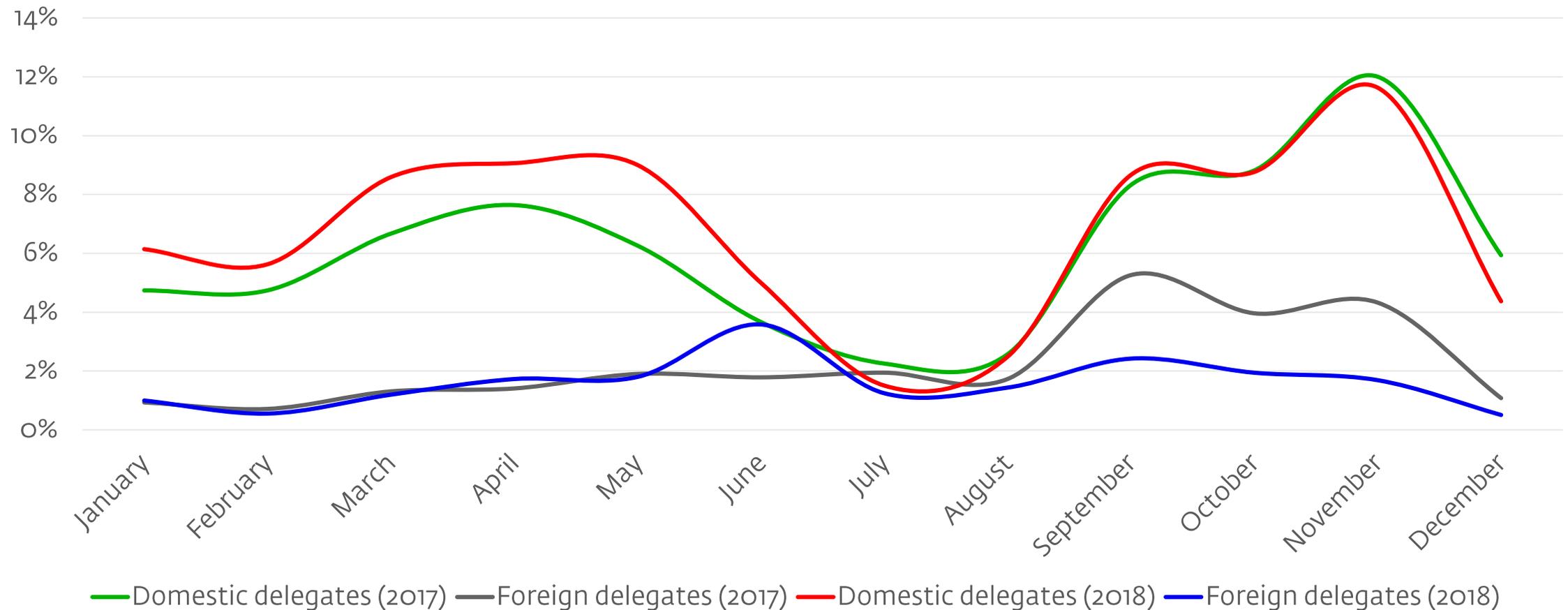


Monthly distribution of conferences, 2018 vs 2017



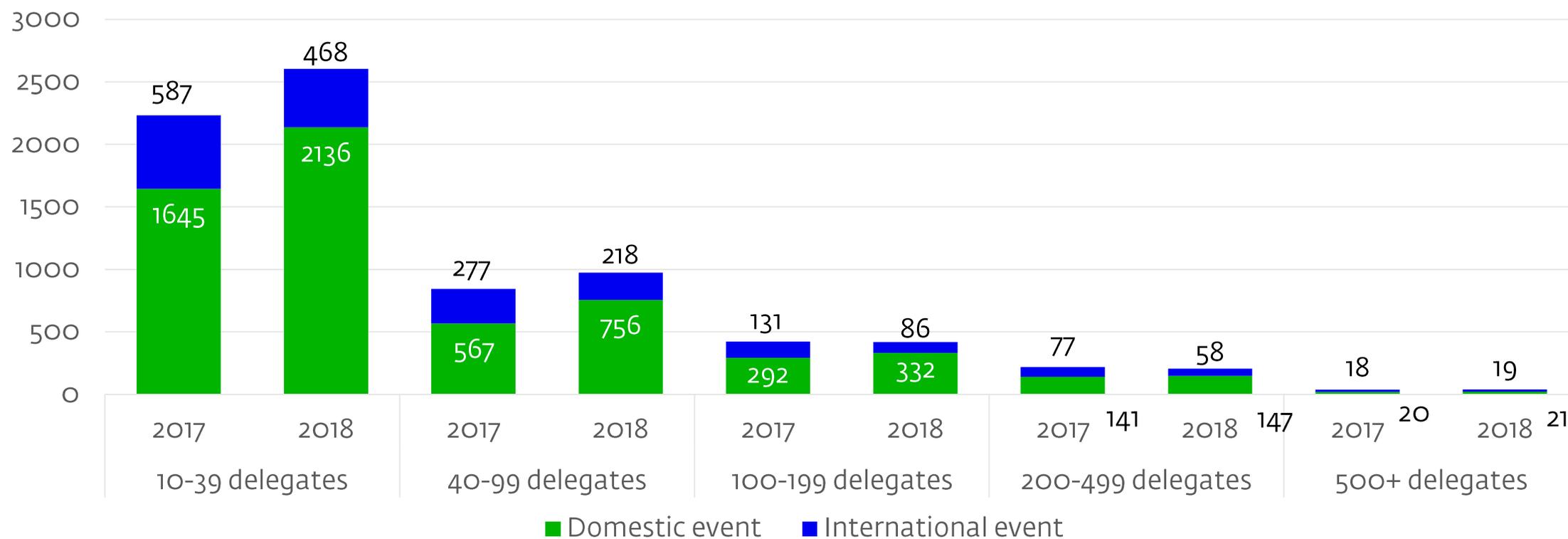
Source: meetings.ee

Monthly distribution of conference delegates, 2018 vs 2017



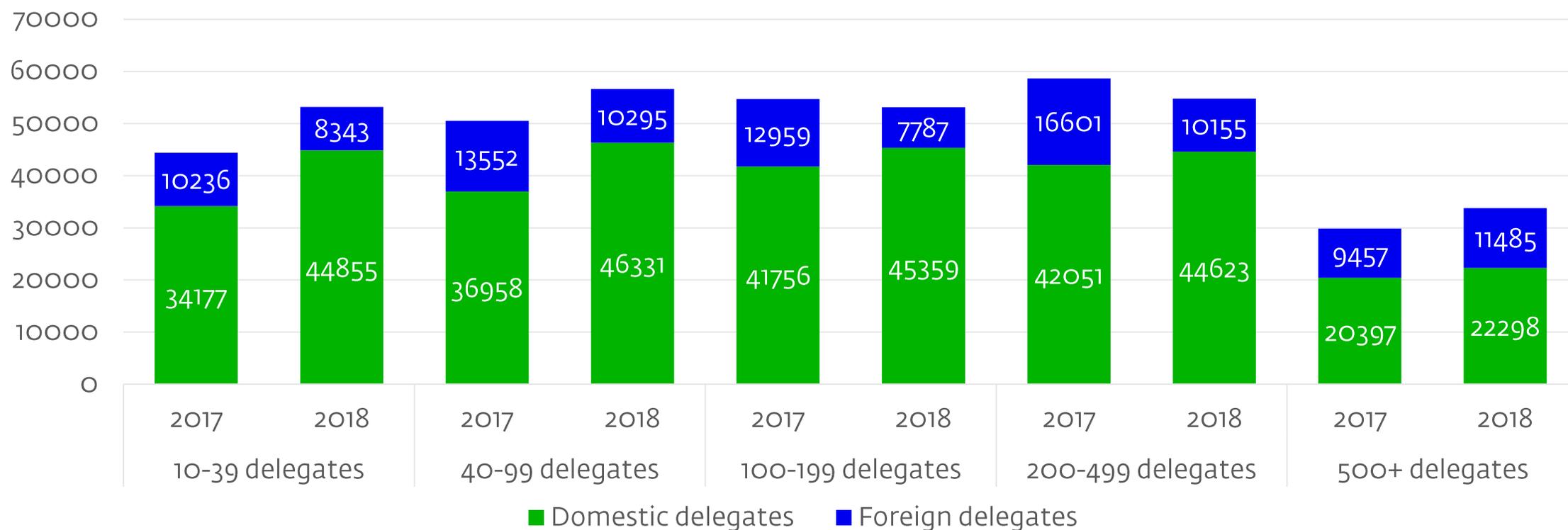
Source: meetings.ee

Conferences in Tallinn by the size of the event, 2018 vs 2017



Source: meetings.ee

Conference delegates in Tallinn by the size of the event, 2018 vs 2017



Source: meetings.ee

Conferences with 500+ delegates, 2018 (1)

Name of the event	Number of delegates	Domestic/ International	Month
Latitude59	2,364	International	May
EGOS 2018	1,893	International	July
Noortekonverents Lahe Koolipäev "Aeg kinkida aega"	1,400	Domestic	November
TMW Creative Impact Conference	1,330	International	April
Business Building Seminar (BBS)	1,300	Domestic	January
FECAVA 2018	1,250	International	June
24th Fecava Eurocongress	1,250	International	June
BBS (Business Building Seminar)	1,200	Domestic	July
BBS (Business Building Seminar)	1,200	Domestic	September
MIndvalleyU	1,153	International	June
Swedbank Sügiskonverents	1,100	Domestic	August
Amway event	1,100	International	September
BBS (Business Building Seminar)	1,000	Domestic	November
Robotex 2018 : conference	942	International	November
The 9th Annual Forum of the EUSBSR	821	International	June
President's seminar Cherrytree OÜ	800	Domestic	March

Source: meetings.ee

Conferences with 500+ delegates, 2018 (2)

Name of the event	Number of delegates	Domestic/ International	Month
President's Seminar – Mario Kapun Special	770	Domestic	February
Konverents Eesti Arstide Päevad 2018	700	Domestic	May
Moontec 18	700	International	November
GeekOut 2018 Java technology conference	700	International	June
Psycherence 2018	669	Domestic	September
Linnade ja valdade päevad 2018	660	Domestic	March
Euroopa Koolijuhtide Ühenduse (ESHA) konverents	628	International	October
President's seminar	600	Domestic	April
President's seminar Cherrytree OÜ	600	Domestic	March
SLE 2018	565	International	August
Äriplaan 2019	550	Domestic	October
Lennart Meri Konverents	538	International	June
NATO CyCon	500	International	May
Abi Goes Tallinn	500	Domestic	February

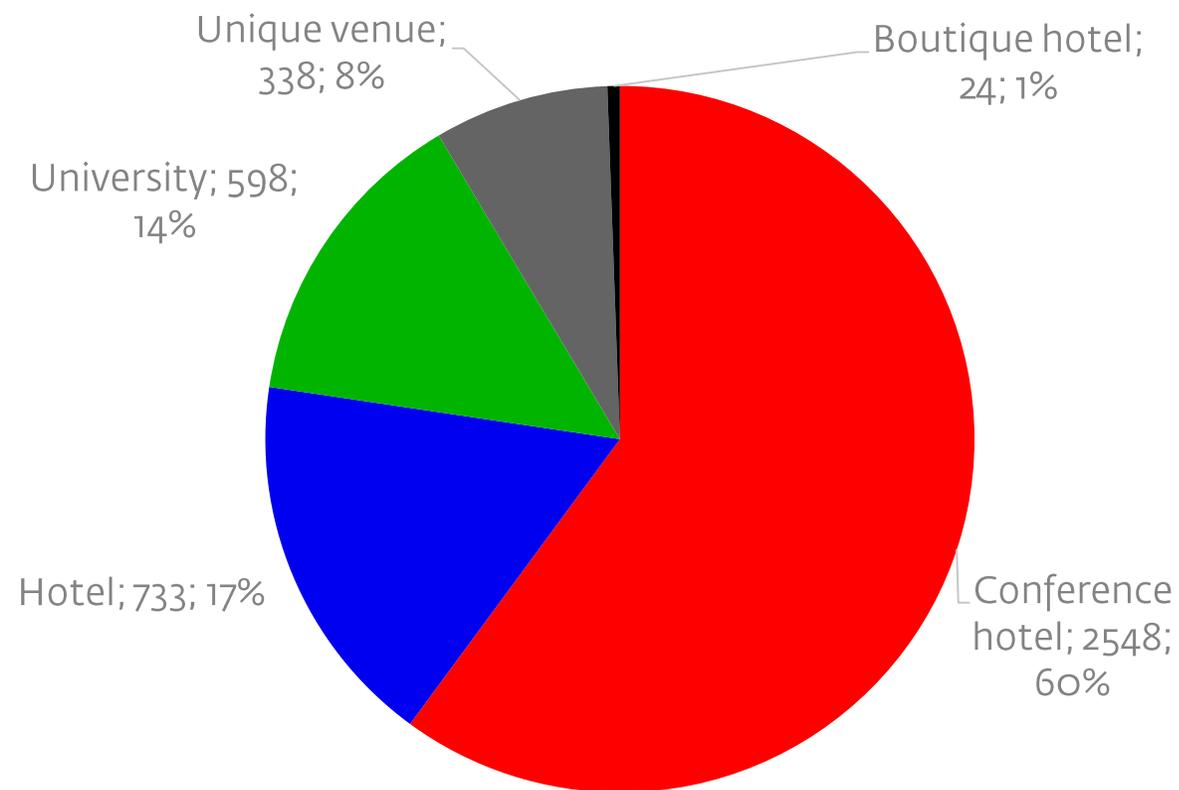
Source: meetings.ee

Conferences with 500+ delegates, 2018 (3)

Name of the event	Number of delegates	Domestic/ International	Month
GLS 2018	500	Domestic	November
Rail Baltica Global Forum 2018	500	International	April
Artistry ja Nutrilite koolitus	500	Domestic	March
Gaselli Kongress 2018	500	Domestic	February
EESTI RAAMATUPIDAJATE KONVERENTS "Teejuht 2019. aastaks"	500	Domestic	October
Isamaa konverents ja ERSP aktus	500	Domestic	September
MELT Innovatsioonifoorum	500	Domestic	April
R-Kioski frantsiisipäev	500	International	February
Refresh 2018	500	International	September
"Suveks tööle 2018"	500	International	April
Total:	40		

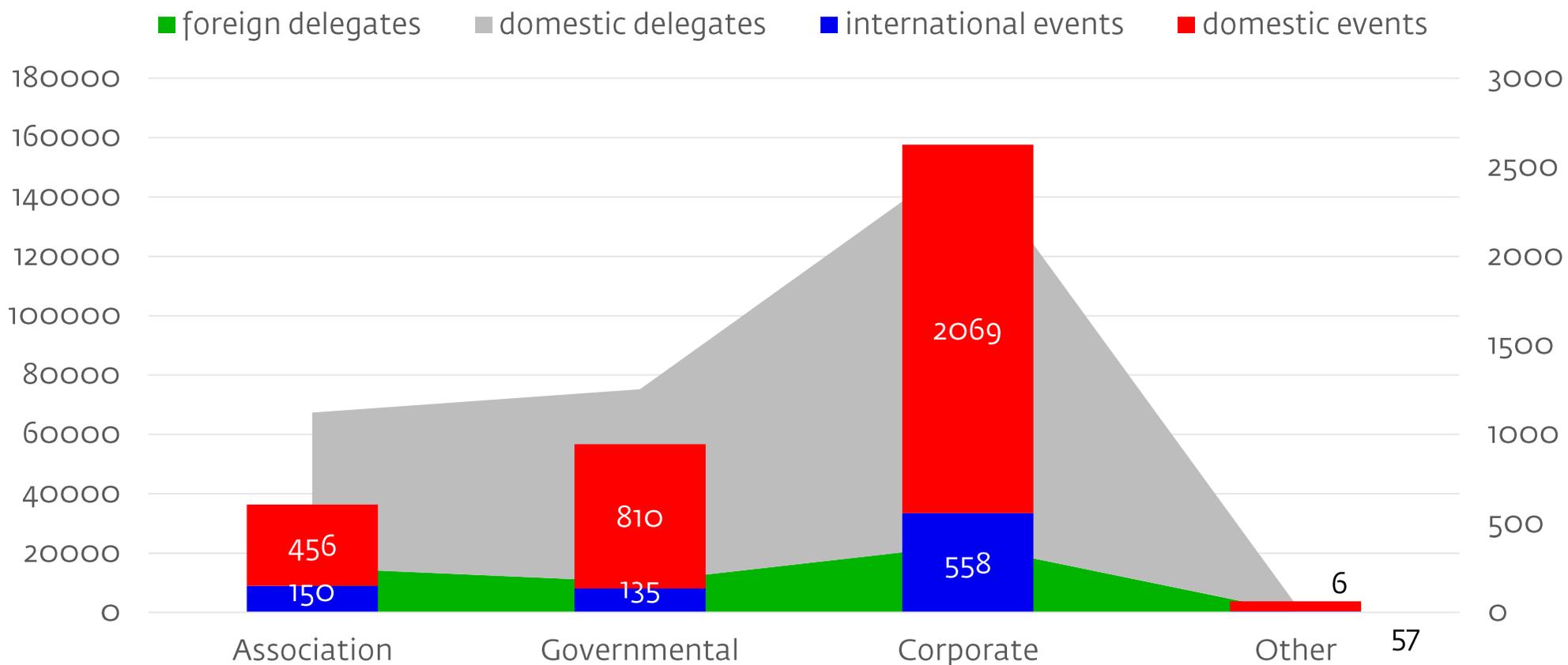
Source: meetings.ee

Conference venues 2018



Source: meetings.ee

Distribution of conferences and delegates by organiser type, 2018



Source: meetings.ee

Summary – conferences in Tallinn (1)

In 2014–2018, the number of conferences organised in Tallinn remained relatively stable: approximately 4,000–4,300 events each year, with the exception of 2016, when there was a significant decline (3,200 conferences). **2018 showed another increase (4,241 events)** due to more domestic conferences being organised (a record-breaking number of 3,392). At the same time, the number of international conferences reduced to the level of 2016 (849 events).

The decline is due to the fact that, in 2017, the number of international events and foreign participants increased because of events related to the Estonian Presidency of the Council of the EU from July to December 2017. This caused the estimated decrease in the number of conferences in 2018. Surprisingly, only the number of international conferences decreased, while domestic conferences increased significantly.

36 companies submitted information on the conferences held in Tallinn in 2018 (see Annex 2).

According to the submitted data, 4,241 conferences were held in Tallinn in 2018 with 251,531 participants. In 2017, a total of 3,755 conferences were held for 238,144 participants: **the number of events in a yearly comparison increased by 13% and the number of participants increased by 6%**. Compared to 2017, the number of local conferences increased by 27% while the international indicator decreased by 22%; the number of domestic participants increased by 16% and the number of foreign participants decreased by 23%.

Summary – conferences in Tallinn (2)

Of all the events, the largest proportion (80%) is comprised of domestic conferences and local participants (81%). See detailed information on the conferences and participants in Annex 3 and Annex 4.

Conferences held in Tallinn continue to be short. Three out of four conferences (76%) only lasted a day. Every sixth event (16%) lasted for two days and 8% of all events lasted for three or more days. The same indicators are reflected in the distribution of participants by events.

Of all domestic conferences, most (83%) lasted one day.

International events bring people to Tallinn for a longer time than domestic conferences do. In 2018, a total of 51% were single-day conferences, 32% were two-day conferences and 17% lasted for three or more days.

Conferences are seasonal in Tallinn. More are organised in spring (from March to May) and in autumn (from September to November). The most popular months for organising conferences are November (510 events), May (491 events), and October (460 events). The largest proportion of international conferences (112 events) were held in June.

Summary – conferences in Tallinn (3)

Most of the conferences organised in Tallinn in 2018 included a small number of participants: **conferences with up to 100 participants constituted 84% (3448 events)**, those with 100–499 participants constituted 15% (623 events), and for a single per cent of conferences, the number of participants exceeded 500 (40 events). In a yearly comparison, the largest increase was among domestic conferences with up to 100 participants (an increase of 31%). Meanwhile, the number of international conferences with up to 100 participants and 100–499 participants decreased by 21% and 31%, respectively.

Of the 4,241 conferences organised in 2018, a total of forty included 500 participants or more – concluding 1% of all conferences. **This single per cent brought in 13% of all participants (24% of all foreign participants)**. The largest proportion of major events were organised in June. The average conference for 500+ participants lasted for 1.88 days, whereas the longest event lasted for 24 days.

Of all the conferences held in Tallinn, most (77%, or 3,281) were organised in hotels. 14% (or 598) were organised on university premises and 8% (or 338) at other unique locations (e.g. concert halls, libraries, museums).

Of all the conferences held in Tallinn in 2018, 62% (or 2,627) were organised by corporations. 22% of all events (or 945) were organised by the public sector and 14% (or 606) by associations. Half of all participants (52%) took part in corporate events, 26% participated in public sector events and 22% in association-organised events.

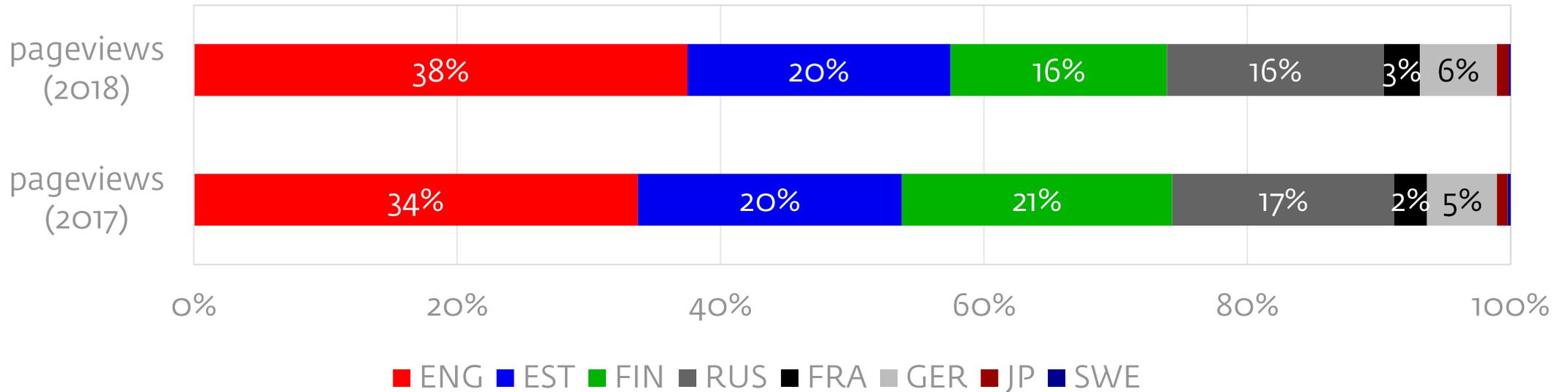
Visittallinn.ee visits 2018

2.27 billion visits (+27%)

6.54 billion pageviews (+17%).

On average **2.88 pages per visit**.

Average duration of visit was **2:51 minutes**



Visittallinn.ee: Konverentsikorraldaja / Meeting planner

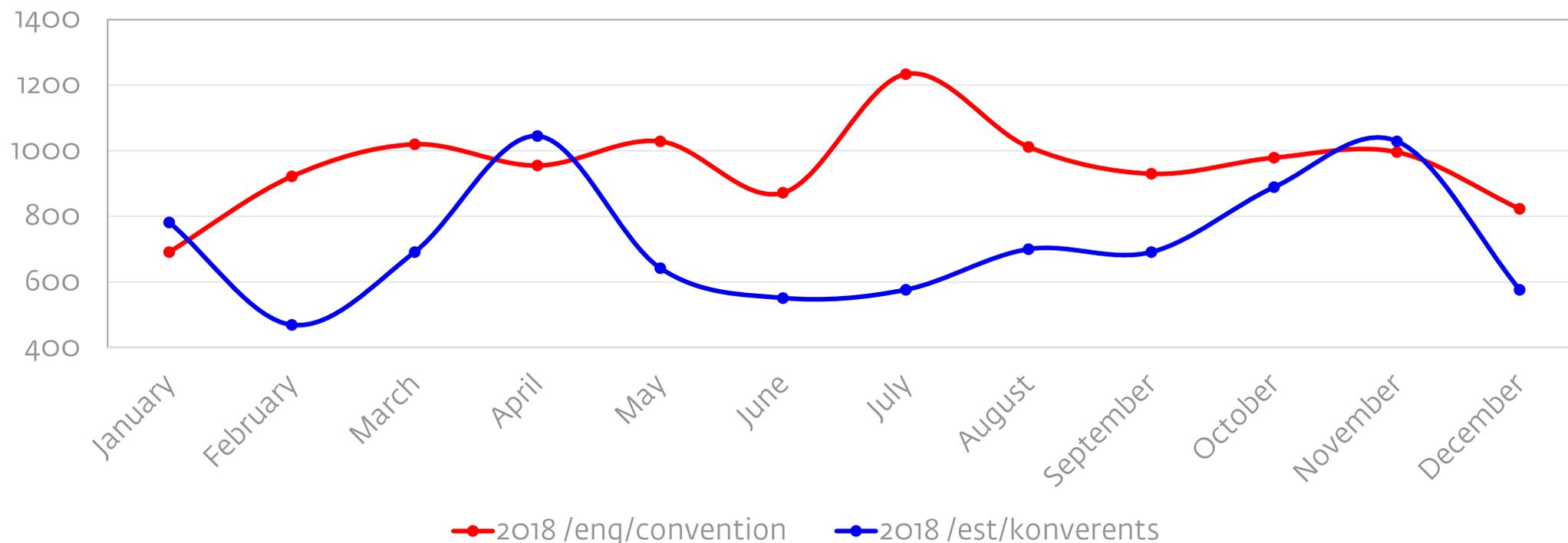
1 January – 31 December 2018

- **Convention**
 - 11,464 visits (+17%)
 - 81,382 pageviews (34%)
 - 7.10 visited pages, time spent 08:44

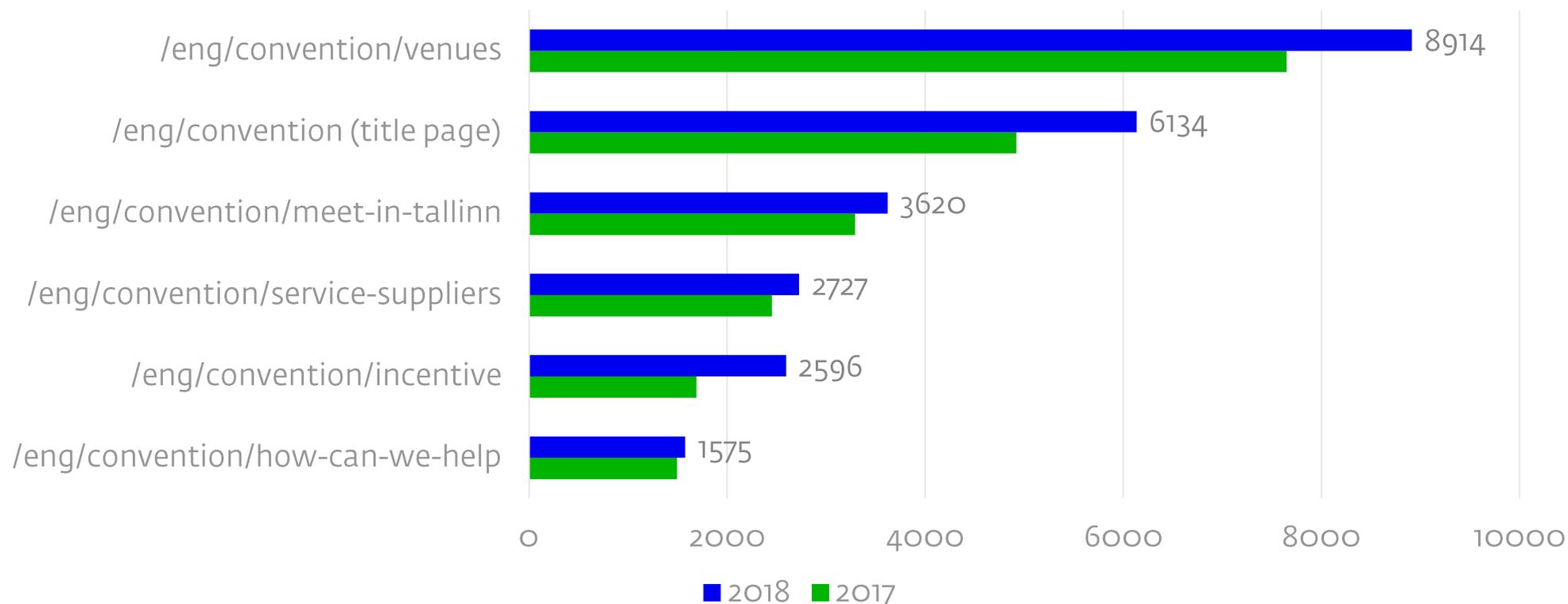
- **Konverents**
 - 8,641 visits (+32%)
 - 36,589 pageviews (+32%)
 - 4.23 visited pages, time spent 04:11

- **Total**
 - 20,105 visits
 - 117,963 pageviews

Visittallinn.ee Meeting planner section EST/ENG monthly visits, 2018

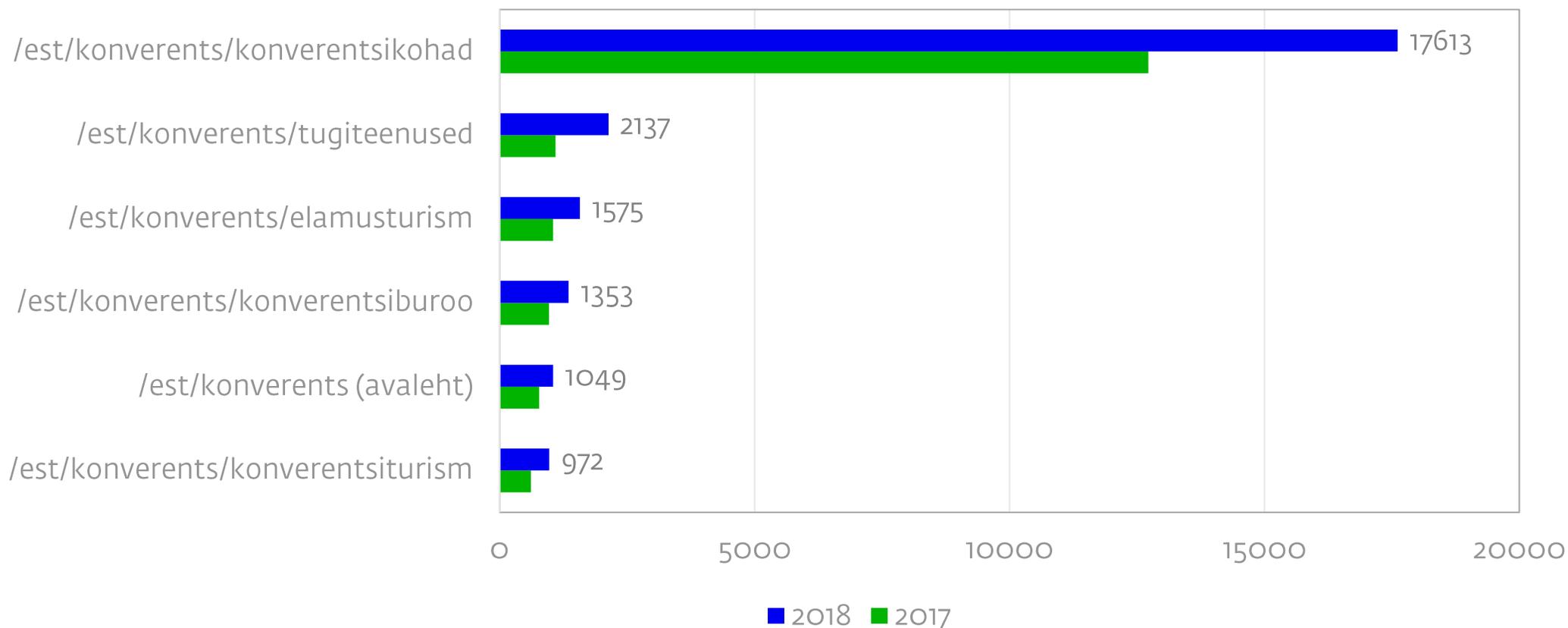


Meeting planner (/eng/convention) pageviews, 2017 vs 2018



*with object views

Meeting planner (/est/konverents) pageviews, 2017 vs 2018



*with object views

Summary – visits to the conference tourism section of visittallinn.ee

The visittallinn.ee webpage had 2.27 billion visits (+27%) in 2018. The most popular themes were sights, events, public transportation, and dining places.

The Meeting planner section had over 20,000 visits (15.789 visits in 2017). The most visited page was 'Venues'.

Annex 1. List of companies who submitted data of Estonian events in 2018

Alexela Kontserdimaja	Hotell Ülemiste	Swissotel Tallinn
Baltic Travel Group	Jääaja keskus	Tallink City Hotel
balticEVENT	Kohvik Pierre	Tallink SPA & Conference Hotel
CWT Estonia	Kultuurikatel	Tallinna Lauluväljak
Dorpat Hotell ja Konverentsikeskus	Kumu Kunstimuuseum	Tallinna Loomaaed
Eesti Konverentsibüroo	Lennusadam	Tallinna Teletorn
Eesti Rahva Muuseum	Mektory keskus	Tallinna Ülikooli Konverentsikeskus
Eesti Rahvusraamatukogu	Mustpeade maja	Tartu Konverentsibüroo
Energia avastuskeskus	Nordic Hotel Forum	Tartu Ülikool
Estonia Resort Hotel & SPA	Original Sokos Hotel Viru	V Spaahotell
Estravel Baltcoming	Park Inn by Radisson Central Tallinn	Vanemuise Kontserdimaja
Glehni loss	Park inn by Radisson Meriton Tallinn	Via Hansa DMC & PCO
GoHotel Shnelli	Publicon	von Stackelberg Hotell Tallinn
Hotell Euroopa	Radisson Blu Hotell Olümpia	
Hotell L'Ermitage	Radisson Blu Sky Hotel	Total: 47
Hotell London	Reisiekspert Conference Expert	
Hotell Sophia	Strand SPA & Konverentsihotell	

Annex 2. List of companies who submitted data of events in Tallinn in 2018

Alexela Kontserdimaja

Baltic Travel Group

balticEVENT

CWT Estonia

Eesti Konverentsibüroo

Eesti Rahvusraamatukogu

Energia avastuskeskus

Estravel Baltcoming

Glehni loss

GoHotel Shnelli

Hotell Euroopa

Hotell L'Ermitage

Hotell Ülemiste

Kultuurikatel

Kumu Kunstmuuseum

Lennusadam

Mektory keskus

Mustpeade maja

Nordic Hotel Forum

Original Sokos Hotel Viru

Park Inn by Radisson Central Tallinn

Park inn by Radisson Meriton Tallinn

Publicon

Radisson Blu Hotell Olümpia

Radisson Blu Sky Hotel

Reisiekspert Conference Expert

Swissotel Tallinn

Tallink City Hotel

Tallink SPA & Conference Hotel

Tallinna Ettevõtlusameti turismiosakond

Tallinna Lauluväljak

Tallinna Loomaaed

Tallinna Teletorn

Tallinna Ülikooli Konverentsikeskus

Via Hansa DMC & PCO

von Stackelberg Hotell Tallinn

Total: 36

Annex 3. Conferences in Tallinn by months, 2018

	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL:
Domestic events	250	235	373	388	412	200	64	121	353	358	421	217	3,392
International events (more than 20% of delegates were foreign)	60	46	66	48	79	112	26	81	91	102	89	49	849
TOTAL (events):	310	281	439	436	491	312	90	202	444	460	510	266	4,241

Source: meetings.ee

Annex 4. Conference delegates in Tallinn by months, 2018

	January	February	March	April	May	June	July	August	September	October	November	December	TOTAL:
Domestic delegates	15,459	14,166	21,616	22,809	22,647	12,578	3,792	6,267	21,809	22,060	29,262	11,001	203,466
Foreign delegates	2,512	1,401	3,012	4,347	4,530	9,010	3,133	3,617	6,090	4,885	4,248	1,280	48,065
TOTAL (delegates):	17,971	15,567	24,628	27,156	27,177	21,588	6,925	9,884	27,899	26,945	33,510	12,281	251,531

Source: meetings.ee



More Tallinn tourism trends can be found from
www.visittallinn.ee/eng/travel-trade-media/statistics-surveys

