

## Brief overview of conferences in Tallinn in 2020

In 2015-2019, the number of conference events in Tallinn has remained relatively stable – approximately 3,500-4,000 events per year. In 2020, the number of events decreased by 52% (1,826 events took place). Across Estonia, the number of conference events decreased by 49%, including 52% in Tallinn, 48% in Tartu, 34% in Pärnu County, and 41% elsewhere.

Conference events taking place in Tallinn are mostly short – 82% of all events last for one day. 96% of the events in Tallinn had up to 199 participants.

On average, one foreign delegate to the conference brings 800 euros to Tallinn, of which 390 euros is spent on accommodation, entertainment, catering, and shopping. Other expenses are related to the event, including room rental, event catering, support services, etc. The tax revenue related to the hosting of one foreign delegate is about 120 euros.

Due to the restrictions applied in 2020, the number of international events with more than 100 participants decreased by 85% compared to 2019. As a result, total revenue from major international events decreased by 93%.

### 2020 in numbers:

Conference event data is collected to respond to inquiries related to destination investments, development projects, and infrastructure development; to obtain input on the basis of which international conference destination rankings are compiled; and to evaluate the events taking place in Tallinn, as well as their scope and impact.

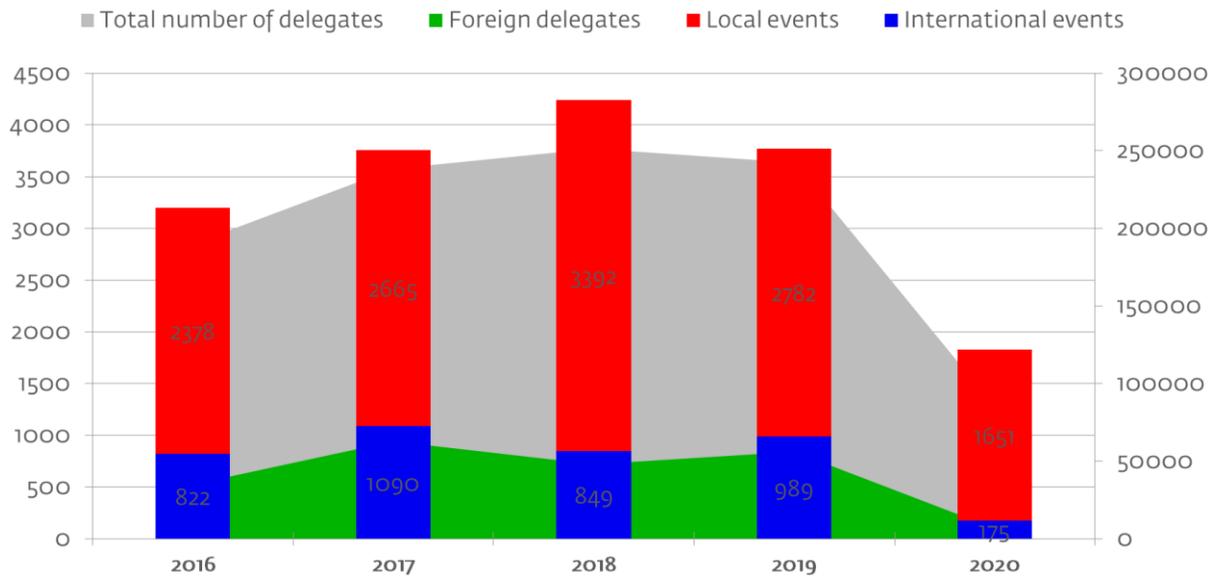
Companies organising conference events in Tallinn have been submitting data on conference events to the Tallinn Tourism Department since 2001.

The data collection is based on the recommendations of the United Nations World Tourism Organisation (UNWTO) and data of events with more than 10 participants lasting at least 4 hours is mapped. In accordance with the methodology, events are considered international if foreign delegates make up at least one fifth (20%) of the participants.

In 2020, 35 companies submitted data on conference events in Tallinn (38 in 2019).

In 2015-2019, the number of conference events in Tallinn has remained relatively stable – approximately 3,500-4,000 events per year. In 2020, the number of events decreased by 52% (1,826 events took place).

### Conference events in Tallinn 2016-2020



	All events	International events	Local events
<b>Number of events</b>	1,826	175	1,651
<b>Share</b>	100%	10%	90%
<b>Comparison with 2019</b>	-52%	-82%	-41%

	All participants	Foreign delegates	Local participants
<b>Number of participants</b>	85,345	6,871	78,474
<b>Share</b>	100%	8%	92%
<b>Comparison with 2019</b>	-65%	-88%	-58%

From September 2020, separate information was collected on how the event was conducted, classifying the events into three: on-site events, hybrid events (with both on-site and virtual participants), and virtual events (virtual participants only).

This summary brings together data from on-site events and hybrid events, as in both cases, the conference participants are present at the venue. Hybrid events also have participants in an online environment.

In 2020, at least 127 virtual events took place in Tallinn, in which at least 82,600 people took part. The number of virtual participants in hybrid events was about 4,300. Thus, a total of about 87,000<sup>1</sup> people were involved in the virtual events in Tallinn. Essentially the same number of people took part in on-site events.

Conference events taking place in Tallinn are mostly short – 82% of all events last for one day.

Local events usually last one day.

International events are usually longer – 58% were one-day and the rest lasted at least two days.

<sup>1</sup> Entering the number of participants in virtual events is a challenge for data submitters, as many do not receive this information from the event organisers. It can be assumed that the actual virtual scope of the events is much larger.

Duration	All events		International events		Local events	
	2020	Compared to 2019	2020	Compared to 2019	2020	Compared to 2019
1 day	82%	-51%	58%	-81%	84%	-41%
2 days	14%	-55%	22%	-84%	13%	-34%
3 or more days	5%	-72%	20%	-84%	3%	-48%

96% of the events in Tallinn had up to 199 participants.  
 4% of the events had more than 200 participants.

	All events	International events	Local events
Up to 199 participants	96%	93%	96%
More than 200 participants	4%	7%	4%

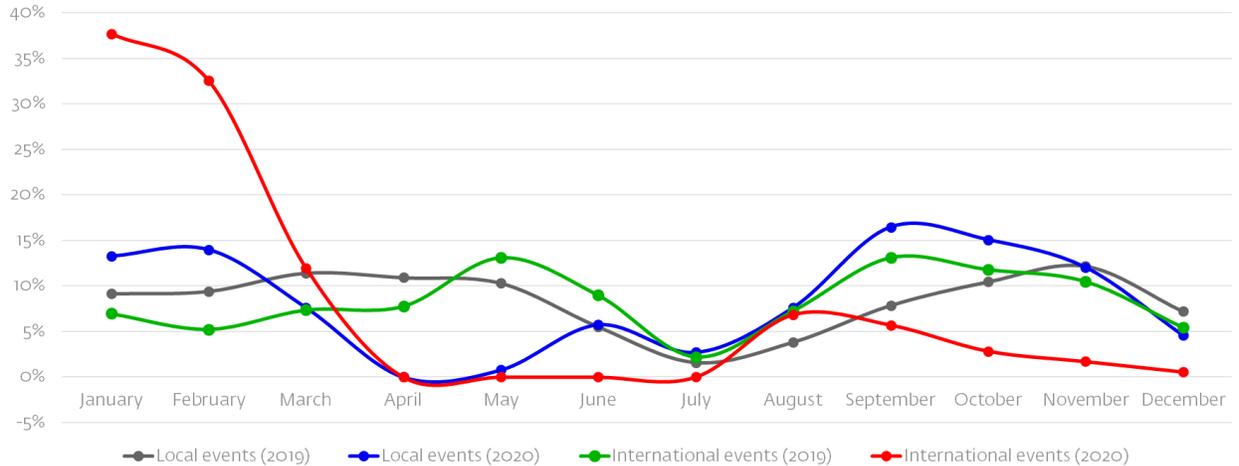
18% of the events were organised by associations and 60% by corporations.  
 14% of international events were organised by associations and 71% by corporations.

Event organiser	All events	International events	Local events
Association	18%	14%	18%
Corporation	60%	71%	60%
Public sector	22%	15%	22%

The largest number of conferences took place in February (288 events), January (285 events), and September (282 events).  
 The largest number of local conferences took place in September – 272 events.  
 The largest number of international conferences took place in January (66 events) and February (57 events).

**NB!** 82% of all international events in 2020 (i.e. more than 20% of participants were foreign delegates) took place between January and March.

2020 vs 2019 a. monthly distribution of events in Tallinn



## Economic impact of conference events

Since October 2020, the Tallinn Tourism Department has been using the analysis tool Event Impact Calculator (EIC) of European Cities Marketing (ECM). The EIC measures the economic impact of an event and calculates its return on investment based on taxes. The online platform and models for economic impact assessment have been developed by the Oxford Economics Company. The number of participants and the duration and type of the event is entered into the calculator, after which the economic impact of the conference is calculated, using models to highlight key indicators such as direct and indirect sales to businesses, impact on jobs, taxes, and tax ROI.

The Event Impact Calculator is used by more than 200 destinations worldwide to evaluate the success of their events. In Europe, it is implemented by conference offices in Geneva, Oslo, and Ljubljana, for example.

Data was entered into the EIC environment retrospectively from 2018. International events with at least 100 participants and with a share of foreign delegates of at least 20% were analysed.

On average, one foreign participant to the conference brings 800 euros to Tallinn, of which 390 euros is spent on accommodation, entertainment, catering, and shopping. Other expenses are related to the event, including room rental, event catering, support services, etc. The tax revenue related to the hosting of one foreign delegate is about 120 euros.

Due to the restrictions applied in 2020, the number of international events with more than 100 participants decreased by 85% compared to 2019. The table below compares the results of 2020 with the average of the previous two years. The high decline rates and the financial indicators behind them illustrate the economic impact of international conference events.

	Average 2018-2019	2020	Change: 2020 versus average
Number of international events	176	27	-85%
Foreign delegates	35,954	2,911	-92%
Total revenue from events <sup>2</sup>	30,010,806 euros	2,152,526 euros	-93%
Average total revenue per event	172,623 euros	79,723 euros	-54%
Total national tax revenue from events <sup>3</sup>	4,566,025 euros	306,404 euros	-93%
Average tax revenue per event	25,943 euros	11,348 euros	-56%

<sup>2</sup> The total revenue of the event consists of the costs of accommodation, transport, catering, trade, recreation, rental of premises, and services incurred by the participants, organisers, and organisations participating in the exhibition as exhibitors.

<sup>3</sup> The national tax revenue of the event consists of VAT, VAT on accommodation, VAT on catering establishments, real estate tax, personal income tax, corporate income tax, and other taxes.

## Summary

The year 2020 had a strong impact on the Tallinn conference sector, leading to a decrease in conference events by more than half. As expected, international events decreased the most – by 82%. It is worth noting that 82% of all international events in 2020 took place in the first quarter of the year.

As a result of the introduction of the EIC calculator, it became clear that one foreign delegate of a conference event brings approximately 800 euros and additional 120 euros of national tax revenue to Tallinn. This result is comparable to the results of the survey of foreign conference delegates commissioned by Enterprise Estonia<sup>4</sup> in 2018, in accordance with which the income of one foreign delegate to Tallinn is approximately 890 euros (including expenses incurred by both the participant and the event organiser).

In 2020, international events with more than 100 participants brought only 7% of the average gross and tax revenue of the previous two years to Tallinn.

Virtual and hybrid events have emerged as a new trend, the latter of which will definitely become part of a regular conference event. Nevertheless, the whole sector is waiting for the crisis to recede, because while a virtual event can create an opportunity to conduct the formal part of the event (presentations, discussions), it is not sufficient for the social part – the desire to meet and exchange ideas – which is at least as important.

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<sup>4</sup> The sample of the survey of foreign conference delegates commissioned by Enterprise Estonia consisted only of international events organised by associations. The number of events entered in the EIC is larger and, as a result, the sample of diverse events is more extensive (including events organised by corporations, associations, and the public sector).