



SUPPORTING SUSTAINABLE GROWTH  
FOR THE UK EVENTS INDUSTRY

# THE SHAPE OF EVENTS

A Report by the Business Visits &  
Events Partnership

September 2021

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tanner

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# FOREWORD



## The Shape of Events

Simon Hughes, Chair, Business Visits and Events Partnership

This report has been produced by the Business Visits and Events Partnership (BVEP) to support both our partner organisations and the wider event industry in the UK. It provides an insight into the complex eco-system that we all work in and how that complexity has impacted on our ability to manage many of the challenges that Covid-19 has thrown at us. Not least of these is the rapidly changing nature of the communications, regulations, guidance, and advice that we must cope with in order to prepare for and then deliver safe and compliant events once again across the UK.

Given this, trying to put a marker down at any one point in time might appear to be a fool's errand but as we see the re-opening of events, the re-building of confidence and the gradual re-booting of the economic impact the event industry has in the UK, we felt that this would be a useful way of supporting the building back better agenda.

As usual this work would not have been possible without the generous support of our partner organisations, which have been unflagging in their contributions whilst also working incredibly hard to support their memberships and stakeholders. John Gallery and Richard Smith deserve many thanks for undertaking the Herculean task of bringing all the data and insights together, whilst the BVEP Executive have also contributed their time, effort, and expertise to ensure that this report is both relevant and useful. Please share it as widely as possible – there are lessons to be learnt and the conversation about those will continue for some time to come.



## KEY FINDINGS

- Huge impact of Covid that is continuing
- Evidence of returning demand – particularly from September 2021
- However, uncertainties and organiser/buyer confidence will continue to impact on the sector's recovery
- Disruptions in international travel pose a continuing threat
- Potential future restrictions creates considerable risk to event organisers
- Significant evidence of business diversification during the pandemic
- Sustainability and hybrid events are key factors that will impact on the future shape of the industry
- Overcoming new barriers arising from the UK's withdrawal from the EU.
- Need for improved data collection, consistency, and reliability.
- Need for the industry to continue to co-ordinate and develop its activities and intelligence in a coherent way

# 1. THE EVENTS LANDSCAPE

Britain's Events Industry is large and complex. In 2019 it was estimated to be worth £70bn of direct spend<sup>1</sup>. At its core, the industry is about bringing people with a common interest together and, in simple terms, it can be categorised into two broad groups:

- Business events defined as those organised by, or on behalf of, companies, trade and professional bodies, local and central government, utilities, the National Health Service, and similar publicly funded entities.
- Leisure events which are principally organised for participation by the general public.

These two groups can be further broken down as the following table summarises:

Event Category	Overview	Estimated value
<b>Business Events</b>		
Conferences and Meetings	Meetings include sales meetings, training, board meetings, AGMs, and larger conferences / conventions.	£18.3 billion
Exhibitions and trade fairs	Events products, services, or information are displayed and disseminated – they include trade and consumer (public) events.	£11 billion
Incentive travel and performance improvement	Incentive travel is a tool used by organisations to motivate their staff and/ or channel partners, with the objective of improving performance at both individual and corporate levels. It often has a conference element.	£1.2 billion
Corporate outdoor events	Hosted entertainment at major sporting events, concerts, and other high-profile functions, and/or participation in sporting or outdoor pursuits-type activities.	£0.7 billion
<b>Leisure Events</b>		
Arts and cultural events	An event where the core content is creative and cultural in essence, such as performing arts, art, film, pyrotechnics, airshow, light, food, literary, historical, seasonal, religious, political.	£5.6 billion
Music events and Festivals	An event where the core content / programme is music, of whatever genre.	£23.6 billion
Sporting events	The main element is physical activity on behalf of the majority of participants e.g., Highland Games, competitions, fun runs, obstacle races, walking, sportive, wellbeing.	£9.6 billion

Source: UK Events Report 2020 – BVEP (2020)

<sup>1</sup> UK Events Report 2020 – BVEP (2020)

The myriad of different events that comprise the industry only partly reflects its complexity.

On the **supply** side it is a complex industry comprising different business types e.g., indoor, and outdoor venues, hotels, unusual venues (like museums or civic centres), organisers (professional and voluntary), festivals, media companies and support services (e.g., caterers, design, and marketing agencies, stand builders, security, transport, and logistics). Organisations within the industry vary in size from freelancers to huge players like Informa, or RX (formerly Reed Exhibitions). Individuals working in the industry work in different disciplines with different skills and career paths. Players (both organisations and individuals may not regard themselves as in the Events Industry, and government statistics and Standard Occupational and Industrial Codes do not adequately recognise the scale of the industry.

On the **demand** side there is further complexity with a range of different audiences that want and require different things from an event – networking and relationship building, education, training, inspiration, creative thinking, team building, reward, sales and marketing, fun and entertainment, wellbeing, a social get-together, a celebration, an experience.....

This diversity and complexity is a strength – fostering dynamism, creativity and innovation, and enabling diversification and cross-fertilisation of ideas and opportunities. But also, a weakness – creating an industry that is difficult to understand by government, policy makers and media.

As the table above outlines, the estimated direct economic impacts of the Events Industry are substantial. However, these are only a partial impact of the industry. In economic terms, it excludes the substantial export of services and shows by UK organisers. Other exports include the 5.3m international business event visitors who generate £3.5bn of direct spend in the UK economy.<sup>2</sup> Business event visitors, especially international ones, also often extend their trip for leisure purposes – 12% of European visitors and 33% of visitors from outside Europe are estimated to extend their trip.<sup>3</sup>



<sup>2</sup> UK Events Report 2020 – BVEP (2020). Data related to 2021 and is based on International Passenger Survey data. NB excludes international visitors attending leisure events.

<sup>3</sup> Business Events Research – VisitBritain/VisitEngland (2018)

Events bring a range of other positive impacts:

- For destinations, events can play a key part in place making, regeneration and developing their profile and brand with wider and longer-term benefits. Notable examples include Liverpool, Londonderry, and Hull (City of Culture) and Glasgow (Garden Festival and City of Culture).
- They generate community and supply-chain benefits at a local level and are also a tool to address seasonality for destinations and businesses – driving business at off-peak periods.
- They are an important tool in regeneration, fostering regional and local economic growth and delivering public policy at a national, regional, and local level. Examples include the UK Government’s International Business Events Action Plan (2019-2025) and Industrial Strategy (BEIS, 2017).
- They have a key role in research sharing, professional development, networking, inward investment, and knowledge transfer - all of which have huge value for individuals, companies and organisations, and destinations.
- They bring important, and increasingly recognised, legacy values that positively influences society, academia, and industry in the host destination, and extend the benefits beyond direct economic measures.
- They foster trade and business activation – creating business relationships and generating sales and contracts.
- Outdoor events bring communities together, create social cohesion, provide volunteering and charitable fundraising opportunities.

This is reflected in the Government’s Tourism Recovery Plan <sup>4</sup> – “As well as the economic impacts of both business and leisure events, there is now much wider recognition of the many other benefits to accrue from hosting and staging conferences and other business events: research sharing, knowledge transfer, professional development, networking and relationship building, and the attraction of inward investment opportunities are among such benefits.”



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<sup>4</sup> The Tourism Recovery Plan – DCMS (June 2021) – p56



## 2. COVID-19 IMPACTS

Comprehensive data on the impacts of Covid-19 are not available on the Events Industry. It continues to be impacted, and the full impacts are only likely to become clearer in the medium-term future.

The hospitality sector has seen the biggest economic declines of all sectors of the economy since the outbreak of the pandemic. Compared to a pre-pandemic base of February 2020 (which is hardly a peak trading month) monthly GVA outputs for the hospitality sector were down throughout 2020/21. The worst period was April 2020 – down 90%. The best period was August 2020 – down 16% (the Eat Out to Help Out Scheme). Output declined again from September – down 67% by January 2021<sup>5</sup>.

The Events Industry has been hit even harder than the hospitality sector. With the exception of periods when small business meetings (of less than 30 people) were permitted, restrictions have effectively closed down the sector from March 2020 to June 2021 – there was no summer staycation, no ‘Eat Out to Help Out’, no inbound travel.

A survey of the players in the Events Industry (the Shape of Events to Come survey)<sup>6</sup> highlights that event related business, over the last 12 months (from April 2020), was down over 95% for over half of operators (55%) compared to the previous 12 months. A further fifth of operators (21%) were down by over 85% and 11% were down over 65%. An estimated overall average was events related business was down 84% in the 12 months from April 2020.

BVEP estimate that, in 2021, the loss of business could equate to £57bn of the £70bn pre-Covid-19 value of the Events Industry (i.e. a downturn of 81%)<sup>7</sup>. DCMS highlight that 17.5% of event and exhibition businesses are estimated to have permanently ceased trading during 2020 and there were estimated to have been 126,000 job losses by the end of August 2020.<sup>8</sup>



<sup>5</sup> Hospitality industry and Covid-19 Briefing Paper – House of Commons Library (March 2021)

<sup>6</sup> As part of the development of this paper, a survey (the Shape of Events to Come Survey) was conducted in May 2021 through BVEP and related associations among event professionals. There were 261 valid responses from different elements of the sector – including conference and meetings (202 responses), exhibitions (74), incentives (30), corporate hospitality and events (135), outdoor events (92), music events and festivals (60), sporting events (51), business travel (47) and social events (92) (NB respondents could be in more than one sector). Organisation types included venues (126), organisers (63), intermediary/agency (42), supplier (47) and ‘other’ (23). nb. These were multiple choice questions hence the total exceeds the number of valid responses.

<sup>7</sup> Estimated economic impact of COVID-19 on Events UK - BVEP (2021)

<sup>8</sup> The Tourism Recovery Plan – DCMS (June 2021) – p56



While impacts on business turnover have been substantial, there are a range of associated impacts:

• **Impacts on the supply chain.** The Events Industry has complex supply chains which have been impacted as the following quote from the British Air display Association illustrates:

*'Whilst the majority of events were able to limit their financial exposure to an uninsurable risk, the industry supply chain bore the full brunt of multiple cancellations across the entire events sector. It remains to be seen how many of the catering, fencing, marquee, security and portable toilet companies (to name but a few), on which the air display events rely, survive into 2021, especially once the furlough scheme is withdrawn.'*<sup>9</sup>

Linked to this, many companies within the Events Industry have needed to liquidate available assets to generate cash flow through e.g. the sale of equipment (like security barriers, portable toilets) to other sectors. The longer-term impacts of this equipment loss remain to be seen. In addition, the Events Industry is a key part of the wider visitor economy (BVEP estimate up to half of the visitor economy is events related<sup>10</sup>) and consequently has impacted on support sectors like accommodation and hospitality businesses. Charity and association fund-raising is also often event based and has similarly seen a significant crisis.

• **Employment impacts.** In the BVEP Shape of Events to Come Survey (May 2021), 55% of operators had made redundancies in the last 12 months. On average, this represented 35% of their workforce (but varied from 1% to 100%). In addition, 83% of operators had used freelancers or sub-contractors less in the 12 months. The medium-term opportunities in the Events Industry are uncertain but undoubtedly some of this talent will be lost to the industry. As one operator in the BVEP survey highlighted:

*'We have built a broadcast facility in our warehouse and decided to sell all of our AV and scenic equipment. We made all of our technical AV and scenic staff redundant last summer and do not intend to re-establish these teams.'*

The UK Crowd Management Association (UKCMA) highlighted that 'between 40 and 50% of those surveyed had reduced staff, turnover and profit, in some case by almost 50%. Many have lost staff to permanent jobs elsewhere in the industry, or to other industries. Many staff have found full-time employment rather than the seasonal and irregular work to which they were accustomed. It is felt unlikely that many of those will return to the security and stewarding industry'<sup>12</sup>

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<sup>9</sup> Source: Annual Review 2020 – British Air Display Association (BADA)

<sup>10</sup> UK Events Report 2020 – BVEP (2020) – p17

<sup>11</sup> The value of charity fund-raising events is estimated to be in excess of £7billion – see UK Events Report 2020 – BVEP (2020) – p17

<sup>12</sup> UKCMA in a letter to the Securities Industries Authority (SIA) (1st March 2021). The data is drawn from a survey of UKCMA members conducted in December 2020 and looking at the impacts of Covid-19 since March 2020.

• **Business pivoting.** The BVEP survey (May 2021) highlighted that 42% of operators had changed their business model and / or diversified their offer or markets to a significant degree and a further 52% had done to some extent. Only 7% had not looked at diversification.

Examples have included:

- o Focus on virtual and hybrid events and enhancing digital offer – by a significant proportion of the industry (32% of those operators that had diversified). However, results were mixed as operators highlighted:

‘Offering all face-to-face events and training activities digitally. Pre-covid this was 25% of our business, this is now 95% of our delivery.’

‘We’ve run online events, but these do not cover even 1% of lost revenue. The online events are more about keeping in touch with our marketplace than a commercial venture’

‘Our usual exhibition stands design and build, and corporate events organiser work fell by 99%. We diversified into online event production and clawed back approx. 6% of our turnover through that work’

- o A sideways shift into other sectors (e.g., electrical contracting, fire safety, security for supermarkets/Covid-19 testing stations, marques for the restaurant sector, generic marketing, print production)
- o Moves into solutions / services for events
- o Diversification into a film location / film and TV studio
- o Reconfiguring venue space to accommodate small events / training / weddings and development of outdoor spaces.
- o Shifts in markets – e.g., from corporate to community/school
- o Converting event/meeting space into office space, or as a PPE distribution hub and COVID-19 testing centre.

• Impacts on convention bureaux which have seen reduced levels of government funding during the pandemic, reduced bidding and activity, and a shift in focus to local and national events (over international).<sup>13</sup>

For operators in the Events Industry, survival over the last 15 months has seen a focus on cost controls (e.g. business hibernation, venue closure, reduction of staff levels), re-focused strategies and business diversification (see above) and use of available reserves. The impacts of these mitigations on business survival is only likely to be apparent in the medium term.

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<sup>13</sup> See - The Impacts of the Pandemic on Convention Bureaus in Europe – MICE Knowledge (April 2021).

There are, however, a number of positives for the industry arising from the pandemic including:

- Diversification and change. The pandemic has been a catalyst for change within individual organisations and the industry as a whole.
- An industry coming together in a more unified and coherent way. For example, BVEP's own role has been strengthened and it has embraced a wider range of partners and collated industry wide statistics.
- One Industry One Voice which is a coalition of events industry campaigns, associations and businesses coming together to ensure strong alignment and more effective communication, championing awareness and financial support for the whole industry. Its objectives include coordination of campaign timings, consistency of data and statistics, alignment on communication to Government, and amplification of key messaging and mutual support to promote campaigns' activities.
- Business relationships. Although very little delivery of business has taken place, organisations have continued to develop their customer and business relationships.
- The development of several campaigns stressing the profile of Industry: - examples include wecreateexperiences (a One Industry One Voice campaign); We Make Events (a PLASA <sup>14</sup> campaign); What About Weddings; and Live.
- The industry has successfully engaged more with government to demonstrate its importance within the visitor economy but the continued need for in-depth, strategic engagement remains.



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<sup>14</sup> PLASA is the lead international membership body for those who supply technologies and services to the event and entertainment industries

### 3. THE ROAD TO RECOVERY

The Events Industry is entering a new, and uncertain, phase as live events are being permitted for the first time in over a year.

Respondents to BVEP’s survey for this report indicated that enquiries in Spring 2021 were down on the same pre-pandemic period (Spring 2019) – 70% indicated their enquiries were down (with 49% significantly down). A fifth (21%) were up. Organisers and intermediaries/agencies were more likely to be up than venues and suppliers. This is probably a reflection of lead-in times from enquiry to event.

The signs of recovery for planners is reflected in data from the Pulse Survey<sup>15</sup>. This survey, of US event planners, indicated that sourcing continues to rise with nearly 90% of planners were focused on live events (the highest proportion since October 2020). This activity is increasingly focused on booking new events (as opposed to rescheduling or rebooking events). Among planners the next live event was most likely to be quarter 3 2021 (31% of planners) but a quarter (25%) were looking at quarter 2 2021. Research by Davies Tanner <sup>16</sup> reflects and highlighted that the industry expected September 2021 to be the key month for re-opening and starting to book events.

UK operators are not expecting a full return to pre-Covid levels in the next two years as the following table summarises:

Event Operators: Future Event Related Business Expectations			
Expectations compared to 2019 (pre-Covid levels)	Time Period		
	Next 12 months (% respondents)	Next 2 years (% respondents)	Next 5 years (% respondents)
Down – 30% or more	55	5	1
Down – 15-29%	18	13	3
Down – less than 15%	11	19	5
About the same	8	41	25
Up – less than 10%	4	9	21
Up – 10% or more	5	13	46

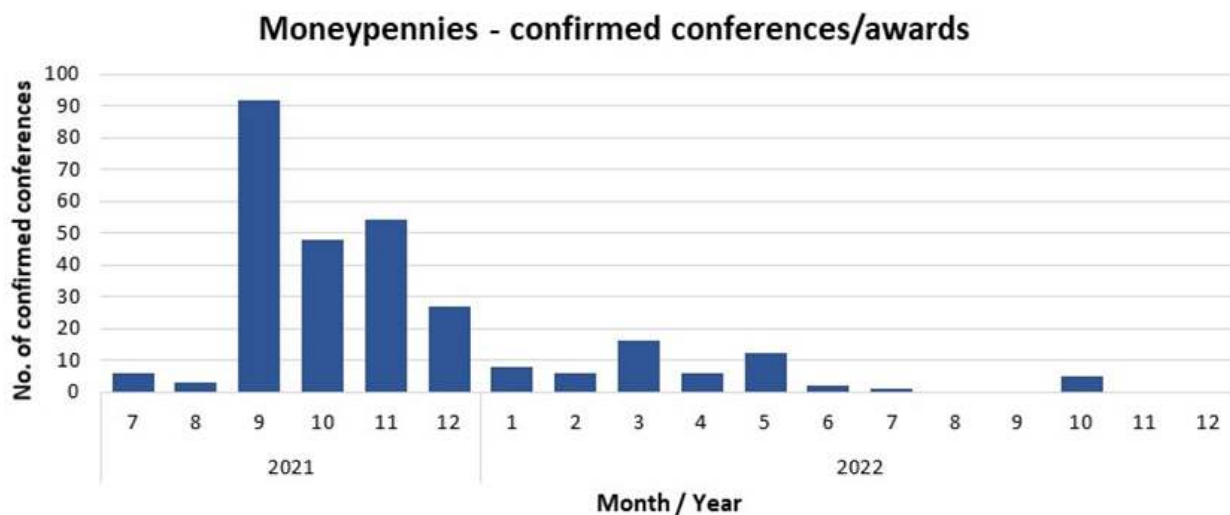
Source: BVEP Shape of Events to Come Survey (May 2021)

<sup>15</sup> The Pulse Survey (the Future of Meetings and Events in the Era of Covid-19) was conducted by NorthStar Meetings Group. The sample was 305 event planners (PCOs, corporate planners and 3rd party independent planners) in the USA. It was published May 15, 2021.

<sup>16</sup> Covid 19: Business Events Recovery Sentiment Survey (April 2021). The sample was 556 across the UK events industry.

Davies Tanner’s research (April 2021) indicates mixed views in the industry - 50% of respondents were optimistic that there would be a full return to normality in their organisation but 38% were pessimistic about their prospects. In general, the industry felt there would not be a return to normality for at least 12 months (50% of respondents).

Data from Moneypennies <sup>17</sup> also suggests that, in terms of conferences and awards, the industry is working to a re-opening in September 2021 and Quarter 4 re-opening.



NB: based on 187 UK corporate and association organisers and 266 events

**The Tourism Recovery Plan** (published June 2021 by DCMS) sets out the role that the UK government will play in assisting and accelerating the tourism sector’s recovery from COVID-19. The Plan, in the short term, aims to see domestic tourism recover (to 2019 levels) by end 2022 and inbound tourism by end 2023. Underlying this are three themes – re-opening safely, supporting business, and stimulating demand.

Step Four of the Government’s re-opening road map marks the end to legal limits on social contact being removed and the legal re-opening of the Events Industry. Within Step Four, there are no legal requirements in terms of social distancing or capacity, wearing of masks, pre-event testing or evidence of vaccine. Within an event, these elements will be at the discretion of the organisers and their event attendees. In effect, the industry will become self-regulating although it will need to satisfy Health and Safety requirements of Local Authorities for licensing of events and ensure that attendees are comfortable and confident with arrangements.

Industry Associations will undoubtedly provide guidance for their members although this is likely to vary by event sector – depending on environmental factors (indoor/outdoor), scale and audience.

Inbound travel is still subject to continuing (and changing) restrictions – creating uncertainty for events with an international audience.

<sup>17</sup> Moneypennies is a supplier of data on UK event organisers tracking the staging of annual awards/conferences by 2000 organisers (1,000 Corporate & 1000 Associations). Research includes the confirmed booking status for a calendar year of annual conferences, exhibitions and awards and maintaining detailed up to date contact details for the organisers of these events. 187 UK Corporate and Associations (79) future booking intentions were included in this case study. They generated 266 awards and conferences.

The **Events Research Programme (ERP)** has been completed <sup>18</sup> and the findings of this will be used to update organised events guidance which is designed to help event organisers and local authorities in England ensure that events are able to go ahead as safely as possible. Phase II and III of the ERP will both inform further improvements to guidance for events organisers at and beyond Step 4 of the roadmap.

At a national UK level there is a commitment to the Events Industry and support for it through a range of initiatives:

- Continued financial support through a range of schemes including the Coronavirus Job Retention Scheme, Self-Employment Income Support Scheme, a UK-wide cut in VAT, business rates relief, Restart Grants, the UK wide Recovery Loan scheme, and the Destination Management Organisation (DMO) Resilience Scheme. During the pandemic, the business events industry has made extensive use of the UK government's pan-economic support package - for example, 94% of venues are estimated to have used the Coronavirus Job Retention Scheme. <sup>19</sup>
- VisitBritain will continue to provide, into at least 2022, its Business Events Growth programme with funding to support the development of international events. It also has launched a domestic equivalent (the Domestic Support Fund) to help kickstart events in 2021 and a new international recovery campaign, 'Events. Reimagined', which will be supported by attendance at key international trade events through 2021 <sup>20</sup>.
- Continued Government Advocacy, through VisitBritain and DCMS, to support to the industry to bid for future business events.
- Cross-Whitehall working through a group of senior officials in key government departments with an interest in growth and business events. This group will be tasked with developing a target list of international business events for the government to focus on bringing to – and retaining in – the UK and developing a plan to host them <sup>21</sup>.

There are opportunities in the short term with major events taking place in 2021 and 2022 (e.g., COP26 in Glasgow, City of Culture in Coventry, Festival of Britain, the Commonwealth Games in Birmingham with an associated £24 million Business and Tourism Programme, and FestivalUK 2022) which help to raise the profile of the industry and global awareness of the UK as an event's destination. New events are getting commissioned as part of recovery programmes. For example, a programme of one-off special events will form a central part of the Mayor of London's £6million 'Let's Do London' recovery campaign.

The domestic market, the majority of the events audience, represents an opportunity particularly for leisure related events where there is potential pent-up demand. For example, #ReviveLive Music<sup>22</sup> highlights that tickets are selling (73% of fans have already bought new tickets) and music fans are ready to return – e.g. over 75% of fans are either ready to go right now, or with some mitigation measures in place.

However, the industry faces a number of challenges. The BVEP Shape of Events Survey identifies, as the chart (below) shows, that uncertainties in terms of confidence (both buyer and organiser) and disruptions in international travel are major challenges for the next 12 months.

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<sup>18</sup> See <https://www.gov.uk/government/publications/events-research-programme-phase-i-findings/events-research-programme-phase-i-findings>

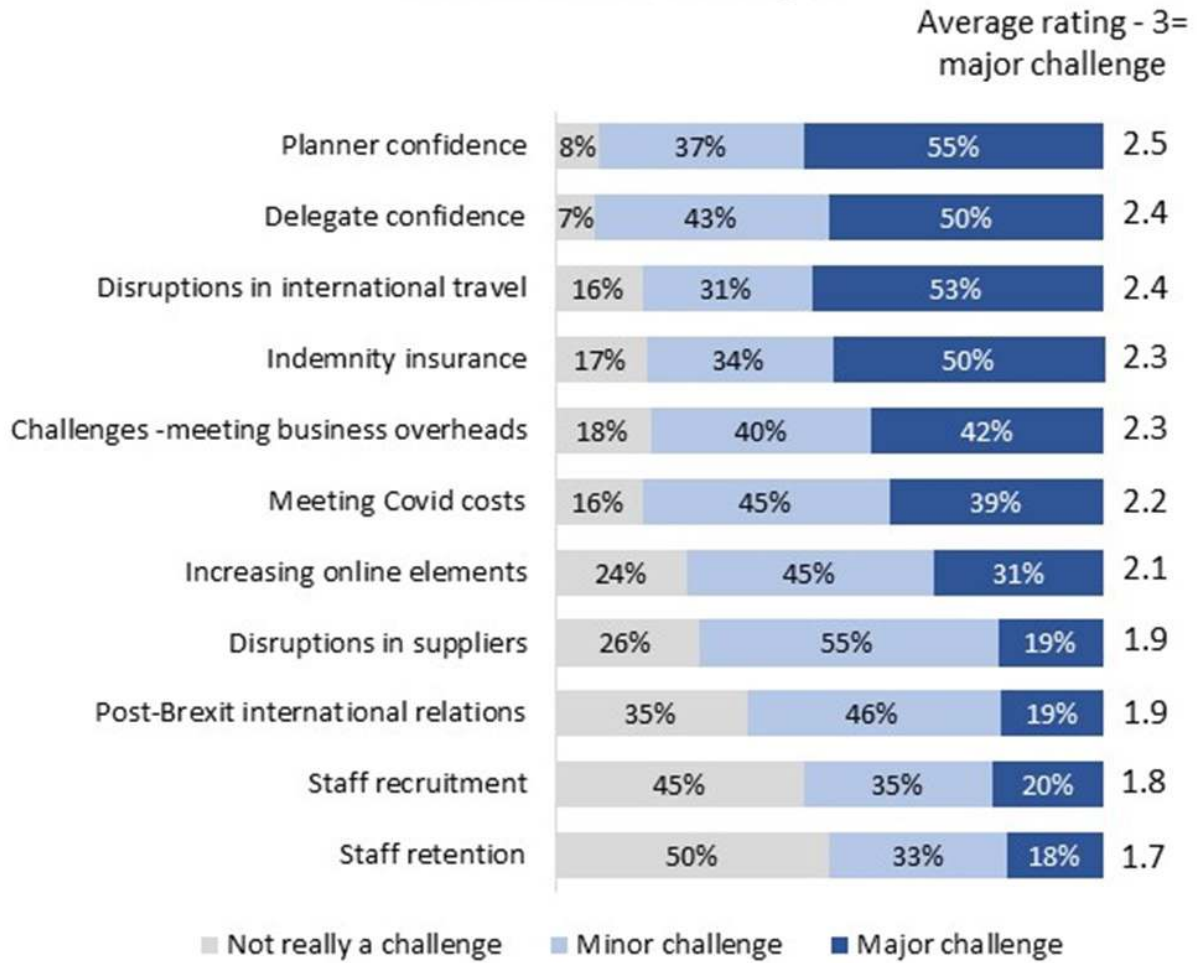
<sup>19</sup> The Tourism Recovery Plan – DCMS (June 2021) p56.

<sup>20</sup> See - <https://www.visitbritain.org/event-support-programme-overview>

<sup>21</sup> The Tourism Recovery Plan – DCMS (June 2021) p58.

<sup>22</sup> #ReviveLive Music –LIVE (May 2021). This was based on survey among 25,000 live music fans.

## Short Term Challenges



Source: Shape of Events Survey (May 2021) n=228

Confidence and related uncertainty will impact on the Event Industry and organisers through 2021 and into 2022. Events typically have long lead-in times. For larger domestic events, the normal planning time would be 3-12 months. Lead in times for larger business events, with a mix of domestic/non-domestic delegates, can be up to two years (and for some international association conferences up to three years with complex bidding and selection criteria). Typically, the larger the event and the further delegates are travelling the longer the lead in times. Once in the diary, these events are not flexible – moving them by a few months is difficult and their annual rotations to different destinations further complicates the potential to postpone them. The Events Industry cannot be turned on and off at short notice.



There are a number of potential factors that will also contribute to planner uncertainties. Variants of Concern (like the Delta Variant) and the threat / reality of further restrictions is a key one, but others include continued restrictions on international travel (with inbound markets not expected to recover until 2025<sup>23</sup> ) and the potential of cautious and inconsistent licensing of events by Local Authorities.

In the short term, the transition from legal requirements to industry led guidance will potentially create some uncertainties in event organisation – e.g., what is going to be events arrangements for the buyer, attendees, staff, and licensing bodies?

Event organisers are facing other challenges. There are supply chain issues with shortages of event related equipment – examples include toilets, security barriers, tents, stages – as event suppliers have sold equipment off or moved into different sectors, and specialist event related skills as companies have pivoted into other sectors. There are venue capacity constraints – both in terms of social distancing (while restrictions remain in place) but also in terms of availability of venues for certain types of events. For example, pent-up demand for weddings is displacing other events (conferences and meetings) from venues.

These uncertainties - the long lead in times, need to commit to contracting with suppliers, and doubts on an event progressing - are further compounded by difficulty for the industry to obtain indemnity insurance for business interruption (identified as a major challenge 50% of the industry – see chart above). This has resulted in cancellation, at different stages or planning, of a number of events in 2021. The government's recent introduction of its Live Events Reinsurance Scheme in the event of total cancellation due to the reintroduction of Covid-19 restrictions is welcome, although, should only partial restrictions be introduced, this means organisers still face uncovered financial risks when planning future events or finding costly commercial cover.

The Events Industry has also identified meeting business overheads, meeting Covid related costs and increasing delivery through online channels are challenges. These, combined with lower-than-average levels of cash reserves for the industry<sup>24</sup> , will make it a struggle for many operators to survive.

For internationally active operators and events, Brexit related factors are a further potential challenge in terms of costs and time delays, work visas (for speakers, exhibitors), import licenses (for goods for display and exhibiting), music touring and, in the case of Northern Ireland, issues over delegate entry to the province.

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<sup>23</sup> The Tourism Recovery Plan – DCMS (June 2021)

<sup>24</sup> Hospitality industry and Covid-19 Briefing Paper – House of Commons Library (March 2021) – see page 16.

## 4. BUILDING BACK BETTER

We do not quite know what the Events Industry will look like in two to three years time – whether it will be bigger or smaller and it may be both with some areas growing and others shrinking. But it will definitely be different. The pandemic has accelerated trends. There are a number of factors, often interacting, that will shape and impact on the future of the industry. These will have different impacts on different parts of the Events Industry and may also create counter trends. Key ones include:

**A Sustainable Future.** The recognition of the importance climate change and sustainability has accelerated in the pandemic. In the Shape of Events survey respondents rated climate change as the primary longer-term challenge for the industry (with 85% identifying it as a challenge). This is an issue that will be central to the future of the Events Industry.

From a demand side, the climate change agenda will impact events' consumers and the way they consume. Post-pandemic, there will be changes in levels of travel demand – particularly in the corporate sector - as organisations seek to reduce their own carbon footprints. Budgets and carbon costs of travel will become much more heavily scrutinised, and travel needs (in light of this, and opportunities for remote meetings) re-appraised. This will impact on levels of demand for events – particularly among international audiences but also in domestic markets. The importance of sustainability will also impact on purchasing choices with buyers looking for re-assurance that the impacts for the events they are buying will be minimised as far as possible (and ultimately carbon neutral). It will become a much stronger element of procurement policy among buyers.

Achieving carbon neutrality will be for a considerable challenge for the industry, particularly for events with a strong international and travel element. Less global events and localism may become a trend in the future. From a supply side, the industry will need to move to having a net zero carbon target - a process that has already started with, for example, initiatives like the Green Meeting accreditation<sup>25</sup>, Tourism Declares (of which, e.g. Glasgow Convention Bureau is a member<sup>26</sup>), COP26 Event Sector Transformation, and the SME Climate Hub. However, it is a largely a bottom-up approach with individual operators recognising the needs and benefits. Looking forward, the Events Industry, as a whole, needs to adopt a top-down approach to developing an overall carbon target and beginning to work towards the wider adoption of that. Industry associations should have a key role in this process. Elements of the industry achieving include better measurement and monitoring of impacts by operators and through the supply chain, and adoption of ISO standards and certification.

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<sup>25</sup> See <https://www.green-tourism.com/green-meetings>

<sup>26</sup> See <https://www.tourismdeclares.com/>

The move to carbon neutrality will initially be an opportunity for individual operators (with early adopters gaining competitive advantage) but also the industry as a whole with the opportunity for the UK to become a global centre for sustainable events, and for the industry to strategically demonstrate its part of a marketing and performance development solution that meets government and business aims.

The Tourism Recovery Plan highlights the need to “Produce a strategy for sustainable business events, including a blueprint for how to hold more sustainable, low carbon international business events. With the UK hosting COP26 later this year, now is the ideal time for the business events industry to demonstrate its commitment to sustainability and reducing carbon emissions. The government will also work with the sector to encourage delivery of fringe events around COP26 where UK industry will showcase its ambition to be one of the world’s most sustainable locations for hosting business events.”

While the primary focus of the sustainability debate is on the environment and carbon neutrality there are other important dimensions for the Events Industry. Economic impacts have always been a core focus for the industry. Economic sustainability will remain a future focal point. For destinations and the public sector this will continue to be about economic diversification and place regeneration. For venues, organisers and agencies it will be about commercial sustainability – generating a profit and investing to meet changing demand. In an industry whose cash reserves have depleted by the pandemic, this will be a challenge.



Community and social sustainability will also remain an important consideration in the future. This partly relates to economic sustainability – ensuring spend and employment are retained in the local area – but also wider issues like positive events legacies, and pride in a community and place which will increase in importance.

**Hybrid Events.** Hybrid events were a trend emerging before the pandemic. During the pandemic there was a pivot to virtual events. Emerging from the pandemic, hybrid events will be here to stay and will grow. This is a trend that will be reinforced by sustainability, which will create a greater demand. Hybrid will be part of the solution for the industry in its move carbon neutrality.



The level of adoption of hybrid or virtual elements will vary across different event types. The small meetings sector is potentially susceptible to a wide shift to more convenient (and cheaper) virtual events although a potential shift to home-based working may create opportunities for live events with a need for work teams to come together physically.

Larger conferences, particularly ones with a strong international component, will increasingly become hybrid. Arts, cultural and music events have already, in the pandemic, moved to virtual delivery and hybrid will part of future delivery – to what extent remains to be seen.

Hybrid events can bring significant opportunities – in terms of reaching new and wider audiences and delivering in an inclusive manner. However, they will bring challenges: the need to effectively organise two events and the associated costs; potentially new business models and charging structures; and investment in facilities and expertise.

**Experience led events.** The combination of more stringent decision making in physically attending events, and more hybrid opportunities will create pressure on the live elements of events will mean a greater focus on the total experience in live events. Allied to this event audiences are changing with a growing importance of millennials (who were set to be biggest group of corporate travellers by 2024 <sup>27</sup> ) and centennials who are looking for experience, authenticity, and participation.

The development of a stronger experience will be paramount to all events. Some examples of pre-pandemic trends include <sup>28</sup> :

- **Conferences and Meetings** – the importance of making connections with people (as opposed to just sitting in meetings) and moving from ‘inform’ to ‘involve’, addressing work life balance with an emphasis on wellness, inter-disciplinary focus (i.e., looking beyond a core area of interest), ‘silent’ conferences (where delegates can access every parallel session through their devices), tech-free conferences.
- **Exhibitions** – a convergence of conferences and exhibitions, greater use of technology and personalisation (through e.g., artificial intelligence, data analytics and profiling and facial recognition technology), greater interactivity with hands on, collaborative experiences and pre- and post-event relationship building with pre-appointments and suggested schedules.

For all event types, ‘curated destinations’, sense of place and an emphasis on the wider experience – i.e., putting additional value on the experiences that cannot be achieved on a computer or at home – will be relevant. For international attendees, where there will be a larger financial and carbon investment, pre and post event experiences will be key – effectively a merging of event and incentive travel.

A potential counter trend to increased emphasis on experience, is a move to standardisation of offer. For example, mergers and acquisitions, and consolidation are driving economies of scale, and more standard brands and products, and the potential of greater regionalisation of events (i.e., taking events to regional audiences – a trend that will also tie into a more sustainable future). Linked to this will be new Business Models in terms of charges, ways of delivering and terms and condition. Contracts and cancellation charges is an issue for the Events Industry that needs resolution. It is a difficult one to resolve in the absence of appropriate insurance underwriting.

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<sup>27</sup> UK Events Report 2020 – BVEP (2020) - p45

<sup>28</sup> See UK Events Report 2020 – BVEP (2020)



**Development Of Skills, Creative Talent, And Professionalism.** The industry faces short- and long-term talent challenges. These include workforce environment, Brexit, the Gig Economy, a diverse workforce and technology and automation<sup>29</sup>. The pandemic has accelerated some of these challenges and there is a shortfall in talent due to Covid (and a move out of the industry – see above) exacerbating Brexit related issues (given the industry’s previous use of overseas workers).

**The Tourism Recovery Plan** highlights the need to “identify the skills and capacity gaps that have emerged as a result of both the pandemic’s impact on the workforce, and of structural changes to the industry. The government will also work with industry leaders to understand emergent opportunities, such as encouraging diverse young people to enter a career in the events industry”.

Attracting young, diverse, and creative talent is an on-going priority. Moving forward the industry will require new skills – e.g., technical skills (managing and developing hybrid/virtual events), data related (e.g., data pools, data mining, CRM) and commercial (e.g., sponsorship and new business models).

Addressing will require more cross-industry work (and a move away from the silo effect) and closer links between industry and further and higher education, an emphasis on education AND experience, a great involvement of young talent in recruitment and marketing (through e.g., Shadow Boards in industry associations), and possibly better pay and terms and conditions.



<sup>29</sup> UK Events Report 2020 – BVEP (2020) – p132-134

## A Competitive UK and Competitive Regions

**The Government's Tourism Recovery Plan** identifies a number of medium to long term objectives including "To be a leading European nation for hosting business events (Objective 6)." In relation to this the plan highlights that "For the tourism sector as a whole to recover, and in order to deliver this Plan, the business events subsector has to be firing on all cylinders. The government wants to improve the attractiveness of the UK's already strong offer and become the World's Meeting Place, with the UK creating more business events, attracting more to our shores, and growing international audiences – leveraging the attendance of government ministers to do so."

**The Tourism Recovery Plan** also outlines the Government's aim of using business events to promote "the UK as a soft power superpower and achieving the government's overarching international policy objectives set out in the Integrated Review of Foreign, Defence, Security and Development policy. The Tourism Recovery Plan will support the UK's objectives of sustaining strategic advantage through science and technology by being the World's Meeting Place for business events."

In addition to an aim of developing and hosting business events, the Recovery Plan also seeks to "see the benefits shared across every nation and region" (Objective 2). The development of all events has an important role in meeting this 'levelling up' agenda. Government is involved in, and committed to a number of important initiatives to help develop business events including improve broadband connectivity in event venues, potentially developing new conference facilities in Southport and Plymouth, the Ministerial advocacy programme, supporting VisitBritain's GREAT programmes (see above) and development with VisitBritain of sector-specific UK-wide events ambassadors (who will promote the UK as a location for, and advocate for, events in key industries and sectors).<sup>30</sup>

The Tourism Recovery Plan identifies that Government will work with the events industry in relation to sustainability, skills, and capacity gaps (see above) and business events venue provision. The latter will focus on regional provision, whether the UK has the right variety of venues to support its international competitiveness in hosting 21st century business events, and how the competitiveness and accessibility of existing venues can be increased.

While venues are important in strengthening the offer in the UK's nations and regions, there is a need for continued investment in regional infrastructure and communications, and regional marketing and Ambassador programmes to help stimulate and attract events. The DeBois Review is considering as part of its review of the structure, funding, and performance of Destination Management Organisations (DMOs).

In the longer term whether Brexit will be an opportunity or challenge is uncertain. The opportunity is for the UK to be the world's meeting place (an aspiration of the Tourism Recovery Plan see above) building on potential innovation in science and industry. However, there is evidence that Brexit may prove to be a challenge for elements of the industry (see above) and there is a need to streamline entry arrangements for potential international event audiences – particularly for Northern Ireland.

However, a competitive international Events Industry is not just about coming into Britain but also about the industry exporting its expertise, services and shows to other countries (a potential opportunity for UK operators with greater regionalisation of events).

Future Brexit arrangements remain unclear at this point and should not become a barrier to this. The withdrawal of the Government's Trade Access Programme for UK companies to exhibit at overseas exhibitions potentially undermines the exporting of UK events.

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<sup>30</sup> The Tourism Recovery Plan – DCMS (June 2021)



**A 'Coordinated Industry' – Sustainability, Intelligence, And Organisation.** One of the few benefits for the Events Industry of the pandemic has been a more coordinated Events Industry – both with itself but also with the government. Moving forward the Events Industry Board and the newly constituted Business Events Recovery Working Group will continue to have key roles in advising the government on business events policy and ensuring the delivery of the Tourism Recovery Plan.

Continued joint work within the Events Industry will need to be strengthened to deliver on key areas including sustainability and carbon neutrality and skills and talent. Data and intelligence is also a key consideration for the industry moving forward. While there are some examples of on-going data collection in the industry (e.g., UKCAMS<sup>31</sup>, SASiE<sup>32</sup> and initiatives by MIA and Venue Performance<sup>33</sup>), there is scope across the industry to improve data consistency and reliability and to widen the type of data that is collected to provide more robust measures on not only economic impacts but also carbon and social / community impacts.

Industry Associations have a key role in this co-ordination, but they need to balance a long term and top-down vision and agenda with their members (often shorter-term) interests. The development of an over-arching Events Industry body providing strategic input and having a core remit of co-ordinating Government and the Industry's policies and best practices, together with responsibility for growing the size and value of the sector (based upon the successful UK Sport and Art Council models) would be a sizeable but meaningful outcome from all the lessons learned during the pandemic.



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<sup>31</sup> The UK Conference and Meetings Survey – sponsored by VisitBritain, this has collected venue-based data on conferences and meetings since 1993.

<sup>32</sup> Scale and Size Index for Events – conducted by ESSA/AEV/AEO, this looks at the annual performance of the exhibition sector. It has run since 2014.

<sup>33</sup> The Meetings Industry Association's Touchstone will enable venues to benchmark their performance. A similar and existing system is operated by Venue Performance.

## 5. ABOUT THE BVEP

The Business Visits & Events Partnership (BVEP) is an umbrella organisation representing leading trade and professional organisations, government agencies and other significant influencers in the business visits and events sector.

BVEP's vision is to support sustainable growth for the UK's Events Industry.

The Events Industry comprises a number of diverse industry sectors covering, meetings, conferences, exhibitions, trade shows, incentive travel, event hospitality, ceremonies, sporting, cultural and festivals as well as other services provided to travellers and attendees to events.

BVEP's mission is to support growth across the entire sector via advocacy, networking, collaboration, and a collective voice.

BVEP's objectives are to:

- a) operate an umbrella organisation to represent, promote and further the interest of member organisations involved in the United Kingdom Events Industry;
- b) advance the interests, standing, quality, sustainability, and growth of the United Kingdom Events' Industry;
- c) seek greater collaboration across the Events' Industry sectors on common issues;
- d) forge close links with Government departments, including devolved Governments where possible via Representation, that can influence favourable policies towards the Industry. In particular, maintain strong relationships with key sponsoring departments, DCMS, DIT and BEIS;
- e) seek a stronger link with the Creative Industries and other related sectors;
- f) encourage joint events;
- g) increase the focus on professionalism and skills development.

Access to further information on BVEP and its Partner organisations can be found on the website: [www.businessvisitsandeventspartnership.com](http://www.businessvisitsandeventspartnership.com)

## 6. BVEP PARTNER ORGANISATIONS

**All the organisations listed below are partners of the Business Visits & Events Partnership. Partners are listed in alphabetical order.**

ABPCO - Association of British Professional Conference Organisers

AEME - Association for Events Management Education

BTA - Business Travel Association), formerly GTMC

Core Cities

EIA - Events Industry Alliance (including ESSA, AEO and AEV)

EIF - Event Industry Forum

EMA - Event Marketing Association

EVCOM

HBAA

IASB - International Association of Speakers Bureaus

ICCA - International Congress & Convention Association

London & Partners (formerly Visit London)

Meet in Ireland (including Tourism Ireland, Fáilte Ireland, and Northern Ireland Tourist Board)

MIA - Meetings Industry Association

MPI - Meeting Professionals International UK and Ireland Chapter

NOEA - National Outdoor Events Association

PCMA - Professional Convention Management Association

PLASA

PSA - Production Services Association

TNI - Tourism Northern Ireland

UVL - Unique Venues of London

VisitBritain

VisitScotland Business Events

Visit Wales

### **Supporting Government Departments include:**

DCMS - Department for Digital, Culture, Media & Sport

BEIS - Department for Business, Energy & Industrial Strategy

DIT - Department for International Trade

## 7. AUTHORS AND SPONSOR

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This report has been compiled by Richard Smith of Team Tourism Consulting on behalf of the Business Visits & Events Partnership, with support from BVEP Research Group lead, John Gallery of Great Potential Business Tourism Specialists. It includes contributions from many BVEP partners and from organisations across the events sector.

[www.team-tourism.com](http://www.team-tourism.com)

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### Sponsor

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