

THE UK EVENTS REPORT

How Events Deliver the
UK's Industrial Strategy



SUPPORTING SUSTAINABLE GROWTH
FOR THE UK EVENTS INDUSTRY

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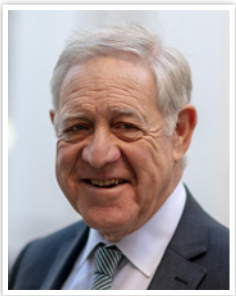
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This report has been compiled by Tony Rogers Conference & Event Services (www.tony-rogers.com) on behalf of the Business Visits & Events Partnership, with support from BVEP Research Group lead, John Gallery of Great Potential Business Tourism Specialists (www.greatpotential.co.uk). It includes contributions from many BVEP partners and from organisations across the events sector. Design and layout by Alistair Bell, Gekko Creative Limited (www.gekkocreative.co.uk).



FOREWORD

A Big Role for Britain's Events Industry

Michael Hirst, OBE - Chairman, Business Visits and Events Partnership

The preparation of this report, which chronicles the enormous scope and potential of the UK's Events Industry, was started a year ago, but what now seems like a lifetime!

2019 was a landmark year for the Industry reporting direct spend of £70 billion, accounting for over 50% of spend in the UK visitor economy, providing over 700,000 jobs and generating in excess of £165 billion in trade facilitated at business events.

The occurrence of COVID-19 in the first quarter of 2020 has put all of that achievement on hold as the Events Industry has gone into lockdown and the precise timing of its re-emergence as a potent economic generator is yet to be fully understood.

The compilation of information in this report shows how far the Industry has come in terms of its enormous breadth, global competitiveness, expertise and how critical it is as part of the government's industrial strategy to kick-start the economy after the coronavirus pandemic. This will be an unparalleled opportunity to use both business and leisure events to showcase the country's abilities and resources and bring communities together and raise the nation's pride in so doing.

The last "Events are GREAT" report was published in 2014 in the wake

of the enormous success of the 2012 Olympic Games held in London. The boost that was given to Britain's position in the world as a leading destination for hosting global events and its ability to organise and market significant cultural, sporting and business occasions, with professionalism, creativity and flair, lives on to this day.

Now, in 2020, the UK confronts not only the impact of a pandemic but also, as it leaves the European Union, a need to realign its commercial footprint, drive UK businesses back to their peak and forge a new position on the global stage. Yet again events held in the UK will play a critical role in achieving this and projecting the UK's place in the world and its strengths as a nation of stature, with strong economic and cultural traditions.

This time the very essence of why events are critical to the national agenda will be demonstrated to the full. Events facilitate trade, attract inward investment and drive exports. Scientific and medical events disseminate knowledge and share research. Events drive the visitor economy. They showcase innovation, bringing cultural, social and commercial benefits to local communities and businesses.

And nowhere better can the UK's place in the world and its impressive soft power be seen than by hosting

major international business and governmental events. Already the country has been home to major industrial, political, commercial, medical, scientific, educational conferences and trade fairs as well as leading edge motivational, cultural, and sporting, music events and festivals.

The UK possesses an unrivalled network of high quality and richly varied purpose-built event venues and historic buildings. These provide an unequalled array of facilities in which to hold events. The UK's service suppliers and event organising professionals offer comprehensive provision of the most up-to-date technology and equipment for staging events. Their talent for first class creative production, marketing and logistical organisation is envied world-wide.

There is no doubt events in the UK embrace every part of the economy and enhance the country's natural assets. That's why this report complements the government's Industrial Strategy in which events are seen as very much part of the Tourism Sector Deal, improving productivity, reducing seasonality and filling spare capacity.

The government's International Business Events Action Plan further endorses the unique role events play. The UK government is committed to helping create new events to align with its key industry sector priorities,

to using events in order to promote UK businesses and their products and services, to attracting more international events and growing already successful events.

This report follows the outlines of the government's modern Industrial Strategy. It explores ideas, people, infrastructure, business environment and places. The Events Industry responds to all these elements. Time and time again it has been said that "events tick all the boxes" of a pre-eminent economic sector that can deliver major opportunities for the UK.

So, having built on past and present experiences, the chance for the United Kingdom to utilise the vitality, excitement and business

and social benefits created by events will once again come to the fore as it demonstrates that it remains a welcoming and open environment in a new political and trading framework, within a fast-changing global environment dealing with the fallout from a once-in-a-generation pandemic.

This report is prepared by the Business Visits and Events Partnership. BVEP's vision is to support sustainable growth for the UK's Events Industry across its diverse industry sectors. These cover meetings, conferences, exhibitions, trade shows, incentive travel, event hospitality, ceremonies, sporting and cultural events 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.

The report was compiled in what seems another age, but it will serve to provide testament to the power of events to create change and transform experiences, key requirements in facing and achieving the UK's future aspirations. So, just as the UK's Events industry had a winning role in the 2012 Olympics, it is poised to do so again, as the country re-adjusts to its economic and community challenges. It's a big role which the Industry is ready and eager to take on and win decisively for the United Kingdom.

EXECUTIVE SUMMARY

This report follows the outlines of the government's modern Industrial Strategy. It explores ideas, people, infrastructure, business environment and places. The events industry responds to all these elements. Time and time again it has been said that "events tick all the boxes" of a pre-eminent economic sector that can deliver major opportunities for the UK.

Events have so much to offer UK plc. They support the industrial strategy of the UK by positioning Britain as a centre of commerce, attracting companies and industries to do business in our country. They are also an ever-increasing export opportunity as they grow into new territories, creating inward investment opportunities, selling UK skills, expertise and products abroad.

Events shape a destination's identity, engender creative enterprise and stimulate innovation, cause positive social impact, strengthening community cohesion and heightening Britain's soft power.

Britain already plays host to an impressive number of high profile world events from major political, commercial, medical, scientific and educational conferences, trade and consumer exhibitions to leading cultural, sporting and music festivals every year. Now there is a growing appreciation by government and the wider business community of the value and the broader economic, social and cultural benefits of the events industry to the UK.

Business events, whether meetings, association events or trade exhibitions, underpin sectoral growth in the economy, attract foreign direct investment, and promote expertise and knowledge transfer opportunities. Festivals,

consumer shows, sporting events, and other cultural and music events all help to animate a destination which, in turn, drives more tourism, more business visitors and investors, and students wishing to come to the UK to study – whether that be in the area of event management or in other disciplines.

Events also stimulate thought leadership through the sharing of knowledge, research and intelligence that progresses scientific and technological understanding and innovation. They also bring communities together, whether they are united by a common geography, interest, cause or belief. Finally, events attract international audiences to the UK, who buy our products and services and, in many cases, return with their families, boosting and complementing the UK tourism industry.

The Economic Dimensions of the UK's Events Sector

The UK's events industry is estimated to be worth £70 billion in direct spend, accounting for over 50% of the UK visitor economy

In total, the UK's events industry is estimated to be worth £70 billion in direct spend, accounting for over 50% of the UK visitor economy. Over £31 billion of this total is comprised of business events, principally meetings, conferences, and exhibitions, while almost £39 billion is contributed by leisure events, including arts and cultural events, music events and festivals, and sporting and recreational events, as detailed below:

Business Events

- Conferences and meetings - £18.3 billion*
- Exhibitions and trade fairs - £11 billion**
- Incentive travel and

performance improvement - £1.2 billion***

- Corporate outdoor events - £0.7 billion****
- Total - £31.2 billion

Leisure Events

- Arts and cultural events - £5.6 billion****
- Festivals, fairs and shows - £6.0 billion****
- Music events - £17.6 billion****
- Sporting events - £9.6 billion****
- Total - 38.8 billion

*Source: UK Conference and Meeting Survey 2019

**Source: Economic Impact of Exhibitions in the United Kingdom, 2019

***Source: Events Are GREAT Britain Report

****Source: Value of Outdoor Events 2018 (UK)

In 2018 inbound business visits to the UK represented 22% of all visits, contributing 8.4 million visits and £4.5 billion in spend. Inbound business events attendees are valuable visitors, spending 30% more on average than leisure visitors.

There are over 5 million inbound visits to the UK annually to attend a business event, generating a spend of £3.5 billion.

In 2018 there were almost 5.3 million trips to the UK to attend a business event, generating almost 20 million overnight stays and a spend of £3.5 billion. 2017 research found that delegates from outside Europe spent £1,748 on average, compared to £990 by delegates from within Europe, and £329 for UK delegates. Crucially, delegates who extend their trip for leisure spend twice as much as those who do not.

However, it would be a mistake to focus only on the economic benefits that events can bring to the countries and cities of the UK, and to smaller towns and local communities. Events play a vital role in professional development, team building and performance improvement, community enrichment, charitable donations, celebrations, personal enjoyment and fulfilment, and a wide range of other benefits for individuals, communities and businesses.

Events can play a major role in asserting Britain's international trading strength, highlighting components of its emerging industrial strategy, its creativity and commercial inventiveness and bringing the country together to present its intrinsic values.

Wider Benefits and Legacies of Events

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.

By attracting events from around the world, their delegates not only bring that economic benefit that is so vital to our economy, spending on everything from hotels to transport, restaurants to attractions. They bring their own global leaders and thinkers to discuss, debate, learn and share. And, by doing so, they engage with our own leaders and institutions in their particular fields: medicine, science, technology, aerospace, communications, finance and many others - leaving that invaluable legacy of knowledge and making connections

that will last for decades and influence our communities for generations.

Volume and Value of the UK Conference Market

Conferences and meetings attract 95.3 million delegates generating £18.3 billion of direct expenditure.

In 2018, there were an estimated 1.48 million conferences and meetings in the UK. These events were attended by 95.3 million delegates accounting for approximately 152.8 million delegate days. There was an average of 428 conferences and meetings per venue in 2018 – this was up on 2017 (373 events) and 2016 (419 events). The average event duration was 1.6 days.

The UK is 5th in the latest global ICCA rankings for staging international association congresses. However, in similar rankings published by the UIA, the UK is in 9th place, suggesting that, while the country is doing well, it could do even better.

Exhibitions Generate £11 billion for the UK Economy

In 2018 exhibitions in the UK generated £11 billion in spending and contributed £5.4 billion in value-added to the UK economy. This activity supported 114,000 jobs in the UK

UK exhibitions attracted over 9.1 million visitors in 2018 to almost 1,100 major events across a range of sectors for both trade and consumer audiences. Over 178,000 exhibiting companies participated in events. Just 23 UK-based AEO members organised over 1000 events outside of the UK in 2018-19, creating £2.17 billion of turnover for these UK businesses. Eighty-four per cent of those UK organisers operating

overseas expected their overseas exhibition turnover to increase over the next twelve months.

Two UK companies, Reed and Informa, top the global rankings of exhibition organising companies, with significantly higher turnover than any of their competitors.

Festivalisation has become a growing trend and buzzword around the exhibitions and business events sector in recent years. It derives from event attendees now demanding an experience and not just an event – an experience that engages, entertains and connects emotionally. It suggests that trade show attendees and visitors want to have fun and they want to experience an event that is not just informative or educational but is sociable, interactive and feels personal.

Incentive Travel

Incentive travel programmes are now back on companies' radar, with a deeper appreciation of their effectiveness for motivating and rewarding staff and dealers. The clear connection between incentive travel programmes and corporate revenues is proven and companies have re-committed to such events.

Companies are realising that incentive travel programmes have an effectiveness BEYOND sales. They are seeing that the growth in annual revenues that can be attributed to a well-executed incentive travel programme is only the tip of the iceberg in terms of real and lasting impact and now appreciate the benefits of setting 'soft' objectives for their programmes.

Outdoor Events

In 2018, there were 141.5 million visits to outdoor events in the UK, with a total on-site and off-site spend of £39.5 billion. The Gross Value Added (GVA) contribution was £30.4 billion, with a full-time equivalent employment of just under 600,000 people

Outdoor music events and festivals provide the greatest economic contribution, with the highest spend per event visit, GVA contribution and employment. Music and recreational events predominantly encourage overnight stays, supporting accommodation providers (including retailing of mobile accommodation) as well as food, drink, travel, durable goods and merchandise suppliers.

Attendance figures for events are not only important for those generating an income through ticket sales or secondary spend but also as an indicator of how relevant such events are to a person's lifestyle and quality of life.

The total number of attendances at outdoor events in 2018 was 141.5 million

Music Events

The area of the live music industry defined as 'music tourism' generated £4.5 billion in spend in 2018, rising 13% from £4 billion in 2017

The music industry's rich and varied programme of concerts and festivals continues to attract an increasing number of fans. In 2018, 29.8 million people attended live music events in the UK, a rise of 2% from 29.1 million in 2017. Total concert attendance in 2018 remained level at 24.9 million, but again the biggest growth was festivals, where the total

audience rose by 23% to 4.9 million – up from 4 million in 2017.

A total of 11.2 million music tourists enjoyed events in the UK in 2018 – up 3% from 10.9 million in 2017 (and compared with 6.5 million in 2012). Overseas visitors (music tourists) increased by 10% from 810,000 in 2017 to 888,000 in 2018, while domestic tourists accounted for 10.3 million of the total figure (of 11.2 million), a rise of 2% from 10 million in 2017.

The average spend by overseas music tourists was £851 in 2018 – a rise of 13% on the £750 of 2017. The figure was more than four times higher than the £196 average spend by domestic music tourists in 2018 – up by 5% on the £186 of 2017.

Sporting Events

Sports tourism has been central to the growth in global travel and tourism during the new millennium. Sport also has a role to play in helping to address wider social issues: it can help to address gender inequality and assists with the development of life skills such as leadership, decision making, organisational and management skills. Sport can also act as an effective medium for conveying educational messages relating to health issues such as HIV/AIDS awareness and malaria.

Major events can deliver directly, or act as catalysts for, wider social impacts or environmental impacts. The social impact of an event concerns its effect on the people and communities around which it takes place and includes, amongst other things, the development of skills and volunteering, inspiring participation and delivering satisfaction.

In 2015, there were 2.57 million domestic overnight trips in England which involved watching live sport, 3% of the total, with spending of nearly £631 million



How events deliver on the UK's Industrial Strategy

In 2017 the government published its Industrial Strategy. In introducing the strategy, the government said that, while the UK has significant economic strengths which can be built upon, more needs to be done to increase productivity and make the most of the untapped potential right across the country. It undertook to boost productivity and earning power across the country by focusing on the five foundations of productivity.

1. Ideas – Events to be the world's most innovative sector

The UK has been at the forefront of technology innovation and adoption for many years. This includes the events industry. It is an area that has seen rapid growth in the innovation of new technology types and adoption of both home-grown and imported technologies.

The report describes a number of key ways in which the events industry supports and delivers the government's objectives of increasing creativity and innovation across the UK economy. It also shows the UK's leading edge position in the

development and application of technology for the management of events.

Creating events is very much part of the creative industries. Event creative includes the development of new concepts and ideas, driven by strategic insight, designed to bring a brand to life in a fresh way. From advertising agencies to architecture to broadcast media to event agencies, the IP (intellectual property) is in creative thinkers dreaming up ideas and concepts that can then be produced.

Event services tend to fall into two buckets: strategy and creative-led event planning, and production-led event delivery. Today's larger event agencies often offer robust services in each bucket, whilst smaller agencies are closely aligned to other 'creative industry' companies. Event creative includes the development of new concepts and ideas, driven by strategic insight, designed to bring a brand to life in a fresh way.

The global growth trend and the UK's contribution to this have been aided by three factors: first, by the cultural trend of increased technology adoption rates for events; second, the trend of an increase in UK-based innovations; and, finally, through the expanding trend of London as a global technology hub.

2. People - The UK is renowned for the skills and experience of its events people

As an industry, events lead to the employment of over 700,000 people from apprenticeship level upwards.

The events industry could not exist without human capital. Despite advances in technology, events rely on people for their existence, such as the creativity and the human empathy that they provide.

Human capital is the stock of skills, knowledge and experience that a person or workforce possesses. A major part of event management is the leadership and management of human resources. As an industry it is important to understand the nature of this human capital, its advancement and flows.

Recognition of the importance of people to the events industry was demonstrated by the setting up of a Talent Taskforce by the Events Industry Board. The purpose of this was to assess the skills, talent and human resource processes across the events industry in order to produce an evidence-based report for ministers that would provide key recommendations to government, and the industry, to remain competitive on a global scale. The aim is to help the events industry develop a sustainable, competitive, highly skilled workforce, aligning with the Department for International Trade's "Attract, Create and Grow" vision for events and trade fairs in the UK.

The Events Industry Board Talent Taskforce survey (EIB TTF) identified a shortage in event-specific skills within the workforce. There were five consistent areas where these shortages existed: sales and business development, project management, creatives, technical and client handling. Fifty-four per cent of respondents believed that the majority of the absence of these skills sits at mid-level within their businesses.

3. Infrastructure - The ongoing need for investment

Competitor countries are investing in new space, both in well-established event destinations and newly emerging destinations.

While the UK undoubtedly has a good record for investing in the

physical infrastructure required for a 21st century events industry, there will continue to be a need for ongoing investment, whether this is to increase capacity through new or refurbished venues, to adjust existing facilities to meet the changing demands of today's and tomorrow's events, or to improve the transport links into the UK from overseas, within the UK between destinations, or, at a local level, for transportation of event delegates and attendees within and across individual cities.

However, an Events Industry Board working group identified that the UK only has two venues 'of scale' which, during prime time, are almost completely booked. The consensus was that this limits the opportunity for the UK to win and expand its international base of exhibitions and congresses at peak times. This is replicated amongst hotel room availability.

In terms of transport and rail infrastructure, all significant projects as well as new government strategy documents should take into account event venues in their feasibility studies/workflows.

4. Business environment - Great growth opportunities

Events can play a major role in asserting Britain's international trading strength, highlighting components of its emerging industrial strategy, its creativity and commercial inventiveness and bringing the country together to present its intrinsic values.

A report drafted by the BVEP in 2016 suggests that there is an opportunity for the events industry to 'position itself as an integral part of the broader trading nation that needs to re-define itself with the European Union and forge new trade agreements with other international

markets. In other words, the future success of the UK events industry is also inexorably linked to the longer term impacts on the key industrial sectors it serves.'

In June 2019 the government published its 'International Business Events Action Plan 2019-2025'

The UK government's vision is for the UK to maintain its position as a leading European country for hosting business events, conferences and congresses. To do this, the government wants to help **create** new international business events, **attract** more existing events to the UK, **grow** our already successful events and **retain** those that might be thinking about leaving.

To meet these objectives, the Action Plan outlines the provision of six different types of support to the business events sector: 1. Government Advocacy; 2. Financial Support; 3. Destination Marketing; 4. Arrivals and Welcome; 5. Capacity and Connectivity; 6. Government Coordination.

VisitBritain's Business Events Growth Programme forms part of the government's commitment to build the business events sector, supporting the attraction of international business events which align with the government's priority industry sectors, and growing the international profile of business events in the UK

The Business Events Growth Programme offers three types of support:

- Bid Enhancement & Support for the winning of new international business events for the UK
 - International Delegate Growth to support the growth of existing business events in the UK
 - Government Advocacy to support the UK's business events industry. VisitBritain and the Department for Digital, Culture, Media and Sport (DCMS) can provide Government Advocacy (soft power) to support the UK's business events sector, by working with cross-government partners.
- Further support could also involve the global **GREAT Britain campaign**, through branding and marketing support. This campaign showcases the best of what the UK has to offer to inspire the world and encourages people to visit, do business, invest and study in the UK.
- The global GREAT Britain campaign is the government's most ambitious international promotional campaign ever, uniting the efforts of the public and private sectors to generate jobs and growth for Britain.
- ## 5. Places
- Events help make prosperous communities across the UK*
- VisitBritain, the tourism marketing agencies of the devolved administrations and destination marketing organisations are working to attract and stage successful events so that communities can benefit from such activity.
- VisitBritain** is focussed on raising awareness with buyers and organisers to consider the UK for business events. Together with **VisitEngland**, its strategy is designed to increase business wins to the UK and support the key pillars of the British Tourist Authority's corporate strategy:
- **Growing value** – by targeting the high spend segment afforded by business events. Just a single business event win can have a large, concentrated economic impact
 - **Improving productivity** – business events are year-round, but with high peaks of activity in spring and autumn. Capacity mapping can help the events industry to fill gaps in occupancy more effectively
 - **Enabling dispersal** – business events activity is very concentrated in London. English regional destinations need support to be more competitive and to access international markets
 - **Being the expert body** – business events are a major priority for the UK government. They can also act as an enabler for the government's industrial strategy and a catalyst for trade and investment in priority sectors.
- The Meetings, Incentives, Conferences and Events / Exhibitions sector is a significant contributor to the economy of Northern Ireland. **Tourism Northern Ireland's (Tourism NI)** brand proposition demonstrates what is offered to event buyers when choosing to meet in Northern Ireland:
- VisitScotland's Events Directorate** is responsible for supporting and developing Scotland's events industry and its wide and diverse events portfolio. It focuses on three main areas:
1. Building on its previous work and the legacy of 2014 to attract, sustain and develop major events, festivals and business events and maximise their impact
 2. Leading and advising the events industry, providing information and training, sharing best practice and

working with the industry to focus on quality delivery

3. Using events to maintain and enhance Scotland's international reputation, influencing partners to develop Scotland's infrastructure.

Located within the Welsh Government, the **Visit Wales Business Events** team promotes Wales as a destination for meetings, incentives, team building, events and conferences. It provides impartial and free advice on products and venues across Wales that cover city, countryside and coastal locations in a mix of modern, historical and purpose-built facilities, supported by spectacular landscapes, incentives and accommodation options.

Destination marketing organisations (DMOs), often trading as convention and visitor bureaux (CVBs), bring the destination to the marketplace, offering a 'one-stop-shop' enquiry point to the conference and event organiser. However, many organisations have now also begun to redefine their purpose, joining with other public bodies to create economic development organisations whose remit covers not only tourism, but also investment, export and the attraction of students and talent.

Identifying the Trends that Make a Difference

- **Destination Sector Alignment in Conference Bidding**
One of the important trends in recent years is the strategy being adopted by many UK cities (along with many overseas destinations) to align their bidding for events with the strengths of their particular local economy. This is not just local industry and commerce (ie. manufacturing and service sector businesses) but also the local 'knowledge economy', encompassing universities, research centres and institutes, and teaching hospitals.
- **Work/Life Balance**
Wellness is huge with professional meeting planners today. Diet and healthy menu planning remain an active focus in negotiations. But wellness today is much more than a proper diet – it's about work/life balance. Planners believe a healthy mind and body helps enable productive participants. So yoga, meditation and breathing classes for meeting breaks are in growing demand, as is spiritual exploration.
- **Orchestrated Serendipity**
Engineering and embracing the unexpected for meaningful moments. Meetings and events provide a unique opportunity to act as an escape from everyday, over-scheduled lives. Event strategists should embrace and even engineer the unexpected, turning away from agendas to create meaningful moments, content, and interactions that participants will value and remember. Event strategists will need to plan flexibly and curate serendipity.
- **Bigger than Oneself – acting on a meaningful message**
An event must completely embody the message that it stands for, and the most meaningful, successful events will be impactful ones. Event strategists should embrace the message of an event and identify the right moments for the message to come to life. Consistency is key, and event strategists will need to ensure that every detail is aligned with an event's message, and that participants hear the message throughout.
- **Clear Sense of Place – leveraging geography for deeper enrichment**
With so much available online, consumers are putting additional value on the experiences that cannot be achieved on a computer or at home. Event strategists should think about events that allow for exploring surroundings, decreasing the emphasis on content to allow for adventure and outdoor exploration.

Business Visits & Events Partnership

The Business Visits & Events Partnership (BVEP) is an umbrella organisation representing leading trade and professional organisations, government departments/agencies and other significant influencers in the business visits and events sector. BVEP and its partners and supporting organisations have a shared interest in the economic benefit and growth of conferences, meetings, exhibitions, trade fairs, incentive travel, corporate hospitality, ceremonies, as well as other business, sporting, cultural and festival events, and including a range of additional services provided to travellers and attendees at events.

Vision

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

Mission

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

Objectives

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, to 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.

Full membership of the BVEP is open to all organisations or representative bodies in the private, public or voluntary sectors whose primary activities are in the field of Events in the United Kingdom. Membership also applies to international organisations with divisions or arrangements which represent the interests of their members in the United Kingdom.

The BVEP Partners at the end of 2019 were:

- Association of British Professional Conference Organisers (ABPCO)
- Association for Events Management Education (AEME)
- Business Travel Association (BTA)
- Core Cities
- Events Industry Alliance (EIA), representing three bodies: Association of Event Organisers (AEO), Association of Event Venues (AEV), and the Event Supplier and Services Association (ESSA)
- Events Industry Forum (EIF)
- Event Marketing Association (EMA)
- Event and Visual Communication Association (EVCOM)

- HBAA
- International Congress and Convention Association (ICCA)
- London & Partners
- Meet in Ireland
- National Outdoor Events Association (NOEA)
- Professional Convention Management Association (PCMA)
- Production Services Association (PSA)
- Tourism Northern Ireland
- Visit Wales
- VisitBritain
- VisitEngland
- VisitScotland

Supporting government departments and agencies include:

- Department for Digital, Culture, Media and Sport (DCMS)
- Department for International Trade (DIT)

Access to full information on BVEP and its partner organisations is via the website: www.businessvisitsand-eventspartnership.com



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CHAPTER 1

OVERVIEW OF THE UK'S EVENTS INDUSTRY

1.1 Introduction

The UK plays host to an impressive number of high profile world events from major political, commercial, medical, scientific conferences, trade and consumer exhibitions to leading cultural and sporting events and music festivals.

There is a growing appreciation by government and the wider business community of the value and the broader economic, social and cultural benefits of the events industry to the UK. Business events, whether meetings, association events or trade exhibitions, underpin sectoral growth in the economy, attract foreign direct investment, and promote expertise and knowledge

transfer opportunities. Festivals, consumer shows, sporting events, and other cultural and music events all help to animate a destination which, in turn, drives more tourism, more business visitors and investors, and students wishing to come to the UK to study – whether that be in the area of event management or in other disciplines.

The reasons for staging business events include opportunities to create and disseminate knowledge, stimulate learning, enhance business performance, foster personal and professional development, increase sales, and to address major societal and environmental challenges.

Events have so much to offer UK

plc. They support the industrial strategy of the UK by positioning Britain as a centre of commerce, attracting companies and industries to do business in our country. They are also an ever-increasing export opportunity as they grow into new territories, creating inward investment opportunities, selling UK skills, expertise and products abroad.

As an industry, events lead to the employment of over 700,000 people from apprenticeship level upwards. They stimulate thought leadership through the sharing of knowledge, research and intelligence that progresses scientific and technological understanding and innovation. They also bring communities together, whether they

are united by a common geography, interest, cause or belief. Finally, events attract international audiences to the UK, who buy our products and services and, in many cases, return with their families, boosting and complementing the UK tourism industry.

The growing body of research into the UK's events industry (see Chapter 2) now provides a robust case for the scale, vitality and growth potential of the sector, helping to gain wider recognition and support, and enabling us to bid for, solicit, create and win new events for the future.

However, in a hugely competitive world with competition for events business continually growing, it is vital that the UK continues to show a real hunger and drive to win events, and to ensure that, having done so, events taking place on our shores are given a warm and memorable welcome, one that will inspire both the organisers and the attendees to return to the UK again and again.

This chapter provides an overview of Britain's events industry, detailing its value, scale, impacts and legacies. It highlights new and emerging trends in events (further developed for individual events segments in Chapter 2). It also makes a number of recommendations for the continued growth and development of the UK's events sector.

1.2 The Value and Benefits of Events

The events sector can be broadly divided into two parts: business events and leisure events. Business events may be 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 are principally organised for participation by the general public.

In total, Britain's events industry is estimated to be worth £70 billion in direct spend, accounting for over 50% of the UK visitor economy (BVEP, 2019a). Over £31 billion of this total is comprised of business events, principally meetings, conferences, and exhibitions, while almost £39 billion is contributed by leisure events, including arts and cultural events, music events and festivals, and sporting and recreational events, as detailed below:

Business Events

- Conferences and meetings - £18.3 billion*
- Exhibitions and trade fairs - £11 billion**
- Incentive travel and performance improvement - £1.2 billion***
- Corporate outdoor events - £0.7 billion****

Total - £31.2 billion

Leisure Events

- Arts and cultural events - £5.6 billion****
- Festivals, fairs and shows - £6.0 billion****
- Music events - £17.6 billion****
- Sporting events - £9.6 billion****

Total - 38.8 billion

***Source:** UK Conference and Meeting Survey 2019 (Rogers, A. et al, 2019)

****Source:** Economic Impact of Exhibitions in the United Kingdom, 2019 (AEV, AEO & ESSA, 2019)

*****Source:** Events Are GREAT Britain Report (BVEP, 2014)

******Source:** Value of Outdoor Events 2018 (UK) (2019)(Jackson, C. et al, 2019)

However, it would be a mistake to focus only on the economic benefits that events can bring to the countries and cities of the UK, and to smaller towns and local communities. Events

play a vital role in professional development, team building and performance improvement, community enrichment, charitable donations, celebrations, personal enjoyment and fulfilment, and a wide range of other benefits for individuals, communities and businesses.

Table 1.1, Events Industry Matrix, summarises the segments that make up the events industry, describing key characteristics, geographical and venue preferences, typical duration, volume and value data, and their principal outputs and benefits.

See pages 18 & 19

1.2.1 Charity Fundraising Events

In addition to the variety of business, sporting and cultural events described above, there are also a range of 'social' events that are vital to the smooth functioning of society and to the health and wellbeing of individuals and of communities. Such events include, inter alia, charity fundraising events, religious events, personal events (birthday and anniversary celebrations, for instance), weddings and funerals. While these social events fall outside the scope of this report, we should nonetheless recognise that they also make a substantial contribution to the UK economy in terms of the jobs which they create and sustain and the revenue and taxes they generate through the spending of organisers and participants. For example, research into charity fundraising events found that the number of such events has increased by 700% and participant numbers have doubled since 2007, estimating the economic impact of this event type at £7.3 billion in 2015-16 (Brown, 2018).

Table 1.1 Events Industry Matrix

Event Type	Event Characteristics / Objectives	Venue Type / Location	Organiser	Duration	Volume/Value Data	Outputs / Benefits
a)	Business Events					
Meeting / Conference	Meetings are out-of-office and involve a minimum of 10 people. Includes sales meetings, training, board meetings, AGMs. Conferences normally have a formal programme with speakers. Commercial conferences are developed to address 'hot topics', with places being sold by the organisers	Hotels, conference centres, academic venues, convention centres, unique venues. Urban, rural and coastal locations	Either organised by an in-house team or may be contracted to a professional conference organiser or event management agency	Meetings typically last from 4 hours to a day. Conferences last from 1-3 days, occasionally longer	In 2018 there were an estimated 1.48 million conferences and meetings in the UK, attracting 95.3 million delegates, and generating £18.3 billion of direct expenditure	Research and knowledge sharing, networking, professional development, motivation, enhanced performance
Trade Fair / Show / Consumer Exhibition	An event at which products, services, or information are displayed and disseminated. Trade exhibitions to promote trade and commerce are attended primarily by business visitors. Consumer shows are primarily open to members of the public	Exhibition and convention centres, hotels. Mostly in city locations with good transport links	Specialist exhibition organising companies, who either own the events themselves or may be contracted to organise for a client	In 2018 major exhibitions in the UK occupied a venue for 4.7 days on average	In 2018 there were 1077 major exhibitions in the UK (43% trade, 48% consumer), attracting 9.1 million visitors, and generating £11 billion of direct expenditure and sales	Exhibitions increase brand awareness, strengthen existing customer relationships, generate high quality business leads, educate and inform audiences, provide an opportunity to conduct and/or deliver market research, and are often used to launch new products.
Incentive Travel / 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. The incentive trip often has a conference element	4* and 5* hotels, in city, rural and coastal locations	Specialist incentive travel and event management agencies	Typically 3-4 days and sometimes longer	Estimated to be worth £1.2 billion to the UK	Team building, motivation, enhanced performance
Corporate Event / Corporate Hospitality	Hosted entertainment at major sporting events, concerts, and other high profile functions, and/or participation in sporting or outdoor pursuits-type activities	Hotels, unusual and sporting venues, entertainment venues	Event management agency, outdoor pursuits specialist company	Up to 1 day	Corporate outdoor events were worth £0.7 billion in 2018	Strengthening customer relationships, networking

Table 1.1 Events Industry Matrix

Event Type	Event Characteristics / Objectives	Venue Type / Location	Organiser	Duration	Volume/Value Data	Outputs / Benefits
b)	Leisure Events					
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	Indoor and outdoor events in exhibition and convention centres, arenas, unique venues	Societies and clubs, venues, event management agencies	Wide range of durations, from a few hours to multi-day	Estimated to be worth £5.6 billion to the UK in 2018, with such events attracting 29.5 million attendances	Entertainment, celebratory, cultural and creative experiences, educational
Music Events / Festivals	An event where the core content / programme is music, of whatever genre	Indoor and outdoor events in exhibition and convention centres, arenas, unique venues. City and rural locations	Concert organisers, music entrepreneurs, venues	From a few hours to several days and, even, weeks	Such events attracted 80 million attendances in 2018, with visitors spending £23.6 billion	Entertainment, community enrichment, economic impact
Sporting and Recreational 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	Agricultural showgrounds, sporting venues, urban and rural locations	Societies and clubs, venues, charities	From a few hours to one day	An estimated 29.5 million participants in 2018 with an associated spend of £9.6 billion	Health and wellbeing, fun and entertainment, charity donations

1.3 Business Visits to the UK by Event Type

In 2018 VisitBritain sponsored an additional question on the International Passenger Survey (IPS) research carried out among visitors to the UK in order to understand the breakdown of the business visits into more detailed categories, especially for those visiting to attend an event. Some key highlights from the research reveal that 3.3 million visits were made to attend small and medium-sized meetings (up to 20 people), while almost 1.5 million visits were made to attend a large meeting (21+ people), a conference, convention or congress, an incentive or team-building event, or an exhibition, event or trade show. The full findings are shown in Table 1.2, which excludes the figures for business trips to the UK made by lorry drivers, others and 'don't knows' (VisitBritain / International Passenger Survey (ONS), 2018a).

Interestingly, the VisitBritain/IPS research also shows that business events visitors (i.e. those visiting the UK to attend a meeting, incentive, conference or exhibition/event) spend 30% more than leisure visitors.

1.4 Delegate Spend and Trip Extensions

VisitBritain research assessed delegate spend at business events in the UK and described the behaviour of delegates who extend these trips for leisure purposes (VisitBritain, 2018b).

The distance that delegates have to travel in order to attend a business event in the UK was found to be a major factor influencing overall spend, as well as the likelihood of extending the visit for leisure.

The research was based on interviews with 2,200 delegates at 84 business events across Britain between March and November 2017. For incentive trips, spend data was gathered by

CASE STUDY 1.1

Economic Contribution of the QEII Centre

Central London events venue the QEII Centre has recorded its highest-ever net economic contribution to the UK of £153.1 million. This Gross Value Added (GVA) figure is an increase of 72.6% since 2013-14, with a GVA to London alone of £117 million.

QEII's most successful financial year to date generated gross expenditure in the UK of £327.5 million in 2018-19, according to its latest (October 2019) economic impact study, carried out by Grant Thornton. This spend covers a range of activities including overnight stays, subsistence and expenditure in the local economy, and is 5% higher than in 2017-18 and 71% higher than in 2013-14.

QEII's visitor numbers have also increased over the past six years by 42.5% to 300,965 in 2018-19. This is reflected in the centre's annual increase in turnover which, at £15.9 million, is its highest in 33 years of trading.

The number of overseas visitors to QEII has increased by 50.9% since 2013-14 which, given that overseas visitors spend more in the local economy than domestic visitors, is a major factor in the centre's increased economic contribution.

Alongside its economic contribution, the report found that the QEII has also supported 3,921 full-time equivalent (FTE) jobs in the UK – a 95.9% increase on the 2,001 estimated jobs generated in 2013-14.

Over the past year, QEII has attracted more than 400 national and international events, including high profile events such as the Commonwealth Heads of Government Meeting, the Conservative Party Leadership Announcement and the One Young World global forum. The centre has also reinforced its reputation for excellence by winning a total of 30 awards since 2013, in areas including customer service, marketing, AV and overall best venue.

QEII Centre Chief Executive, Mark Taylor, commented: "Our self-funded £16 million refurbishment project, started in 2013, has helped us deliver a Building Valuation increase of 75.8% from £25.6 million to £45 million, along with supporting our repositioning campaign as a flexible events space, able to meet and exceed the needs of our diverse client base. This report shows that, alongside the economic benefits QEII delivers, we are also supporting hotels, restaurants, retail and supply chain, and generating trade and export business stimulation and knowledge sharing – an impact that can only be positive for the UK."

This is the third economic report to be commissioned by the QEII Centre, with the inaugural report published in 2016. The in-depth analysis of QEII delegate data applies official data sources, industry benchmarks and multipliers, qualitative data from interviews with key partners and modelling to assess the impact of several major events.

The Grant Thornton report for 2018-19 concludes that the QEII Centre remains the only dedicated conference and events centre in central London of its size. It plays a major role in the capital's strong reputation for events and enables the UK to compete with other international event destinations.

Source: Fullard, M. (2019, October 7)

Table 1.2 Type of business visits to the UK by overseas residents to attend a business event 2018

Business Event Type	Visits (000s)	Nights (000s)	Spend (£m)
Meeting 1-5 people	1,923	5,592	977
Meeting 6-20 people	1,411	4,372	942
Meeting 21+ people	467	2,115	349
Incentive/team building	70	678	62
Conference/convention/congress	568	2,386	415
Exhibition/event/trade show	356	1,573	299
Training/development	490	3,225	457
Total	5,286	19,942	3,502

Source: VisitBritain / International Passenger Survey (ONS), 2018

telephone and online through DMCs and incentive agencies covering 38 trips and 5,263 delegates.

The research found that delegates from outside Europe spent £1,748 on average, compared to £990 by delegates from within Europe, and £329 for UK delegates, including expenditure on leisure extensions. Delegates from outside Europe were also more likely to extend their stay for leisure than overseas delegates from within Europe, with 33% and 12% of each respectively doing so. Only 2% of UK delegates extended their business trip for leisure.

Table 1.3 shows the average spend by trip type and delegate origin.

International events attract much higher average spend than their domestic equivalents. The two main reasons are:

- Overseas delegates stay much longer on average (3.7 nights) than domestic delegates (1.0 nights)
- International events charge much higher registration fees

For incentive trips, the average spend per delegate is £1,893. It is highest for trips from North America (£2,311), the main reason being the higher

average length of stay (4.9 nights) compared to other markets. Average incentive trip spend varies by region of Britain: London (£2,332), Scotland (£1,518), rest of England (£1,118).

Regional expenditure by delegates attending international corporate and association events is shown in more detail in Table 1.4.

Delegates attending events in Scotland spend about twice as much as delegates in the rest of Britain. The researchers suggest that the most significant reason for the vast difference in spend is length of stay. Delegates to international events in Scotland stay 2.8 nights on average, compared to delegates to international events elsewhere in Britain, who stay 1.8 nights on average. High registration fees charged at some events in Scotland also impact on the average spend. However, it should also be noted that, for this research, all of the events covered in Scotland were international, with a higher proportion of delegates from overseas who are more likely to extend their business trips and spend more.

A breakdown of delegate expenditure by category of spend is shown in Table 1.5.

Crucially, delegates who extend their trip for leisure spend twice as much as if they had not done so, with extenders spending an average £1,942 in total compared to £991 spent without the leisure part of their trip.

One of the main reasons for extending visits is that delegates will have the opportunity to see places they may not otherwise visit for holidays. This is supported by a strong correlation between extending the trip for leisure and the distance (in terms of country/continent) from the UK. This is because the further away from home a delegate travels, the less likely they would be to visit the place at any other time, which in turn increases the attraction of extending. The researchers also found that destination appeal and time of year played a small role in delegates' decisions to extend, with opportunity, practicality, and proximity of family and friends being more influential factors.

These findings present a key opportunity for those cities and regions that lack awareness or international appeal and the research recommends that they should invest resources to encourage extension. It also recommends that VisitBritain and its partners work closely with event organisers to ensure that messages around extending business visits for leisure reach delegates soon after registering but before they book their flights.

With practicality a key factor in the decision to extend, the research report emphasises the importance of quick and easy transport between airports, accommodation and the city, as well as highlighting to delegates what there is to see and do in the region.

Table 1.3 Average spend by trip type and delegate origin

Event Type	Average spend per delegate
Association conference - international	£1,021
Corporate conference or meeting - international	£856
Association conference - domestic	£448
Exhibition / trade fair - international	£352
Corporate conference or meeting - domestic	£299
Exhibition / trade fair - domestic	£203
Overall	£613

Source: VisitBritain (2018b)

Table 1.4 Average spend by region of Britain

Region of Britain that the event takes place in	Average spend per delegate	Spend per day (day delegates)	Spend per night (overnight delegates)
London	£646	£191	£430
England outside London	£462	£120	£239
Scotland	£1,128	£378	£396
Wales	£517	£164	£270
Overall	£613	£169	£322

Source: VisitBritain (2018b)

Table 1.5 Average spend by category

Spend category	Average spend per delegate	International delegates	Domestic delegates
Registration fee	£254	£449	£160
Accommodation	£181	£442	£73
Food & drink	£67	£135	£35
Shopping	£46	£124	£12
Local travel (excl. travel from home)	£24	£43	£15
Evening events / entertainment	£15	£32	£7
Sightseeing & tours	£6	£19	£1
Anything else	£4	£10	£1
Overall	£613	£1,265	£329

Source: VisitBritain (2018b)

1.5 Impacts of Major Events on Hotel Performance

The beneficial effects on the performance of local hotels when major events come to town are well illustrated in data supplied by the NewcastleGateshead Convention Bureau, which clearly reveals the increases in revenue and occupancy rates when comparing the impacts of major events against similar monthly periods when there is no major event.

Table 1.6 lists a number of major events (sporting, cultural, music) held in NewcastleGateshead and the surrounding region between 2017 and 2019 and shows average occupancy and revenue rates achieved in NewcastleGateshead hotels. In the table, 'average room rate' shows the average price paid for a room, based on rooms sold; Revpar ('revenue per available room') is calculated by: total room revenue divided by the number of rooms available, whether or not actually sold.

1.6 Global Economic Significance of Business Events

In 2018 the US-based Events Industry Council commissioned a study on the global economic significance of business events in 2018, conducted by Oxford Economics. This was unprecedented research that could only be accomplished through the collaborative efforts of the public and private sectors to qualify the value, influence and impact that business events produce throughout the world. It further enables this dynamic industry to benchmark its current contributions and track its future growth. The report produced by the research, entitled 'Global Economic Significance of Business Events', reveals the depth and breadth of the global business events industry, in addition to its economic significance.

Some of the key findings of the research are:

a) Direct impacts of global business events (2017)

- Number of participants: business events involved more than 1.5 billion participants across more than 180 countries
- Direct spending (business sales): business events generated more than \$1.07 trillion of direct spending, representing spending to plan and produce business events, business events-related travel, and other direct spending, such as spending by exhibitors
- Direct GDP (gross domestic product) and employment: business events supported 10.3 million direct jobs globally and generated \$621.4 billion of direct GDP
- Average spending per participant: on average, £704 was spent per business event participant
- Top countries: the top 50 countries accounted for \$1.03 trillion of business events direct spending, representing 96% of the global total

b) Total impacts of global business events (2017)

After accounting for indirect and induced impacts, business events supported a total of global economic impact in 2017 of:

- \$2.5 trillion of output (business sales)
- 26 million jobs
- \$1.5 trillion of GDP (representing contribution to global gross domestic product)
- The business events sector directly generated more output (business sales) than many large global sectors, including consumer electronics and computers and office equipment.

The \$1.5 trillion of total GDP supported by global business events would rank the sector as the 14th largest economy globally, larger than the economies of countries such as Australia, Spain, Mexico, Indonesia and Saudi Arabia. Based on its \$621.4 billion direct GDP impact, the business events sector would rank as the 22nd largest economy globally.

Table 1.7 ranks the top countries by direct spending (billions US\$ and thousands of jobs).

1.7 Value of Knowledge Transfer

The importance of the economic impacts of both business and leisure events, in terms of spend by organisers and participants and the numbers of jobs sustained by such activity, has long been a key message of those working in the events sector. In recent years, such messages have been complemented by those wishing to underline the many other benefits to accrue from hosting and staging such events. Research sharing, professional development, networking, inward investment, knowledge transfer are among the less publicised and often less recognised benefits. A 2018 study commissioned jointly by the European Society of Radiology and the Vienna Convention Bureau highlighted the value of knowledge transfer at major international congresses, suggesting that its value could exceed the value of economic impact by 10:1.

The monetary value of information presented at the 2018 European Congress of Radiology in Vienna amounted to €813 million, according to this study. The total was arrived at by adding up the professional time spent compiling – and the research funding associated with – the content of 3,331 papers presented at the 4-day congress, which attracted a record 28,474 delegates. The findings were derived from a sample of 230 congress speakers who responded to

a detailed questionnaire distributed by the Vienna-based society.

The Vienna Convention Bureau estimated that, for the ESR congress with 20,000 delegates staying in Vienna for four days, an economic impact of 40-65 million euros could be expected. (Association Meetings International, 2018, p.6).

Commenting on the study findings, Rod Cameron, executive director of the Joint Meetings Industry Council (the umbrella body for the global meetings industry), said:

“This is confirmation of the deeper value associated with knowledge transfer delivered from professional meetings such as the European Congress of Radiology. It confirms what we have suspected but have seldom been able to quantify with this degree of precision until Vienna and the European Society of Radiology took this initiative. This will help associations to quantify the value proposition to future members of their scientific communities. I sincerely hope that other associations and destinations collaborate to establish similar value measurement as best practice while we, as a meta industry, seek to demonstrate our contributions beyond those of business tourism alone.”

For further research on the impact of meetings and conferences, view the Joint Meetings Industry Council resources collated by The Iceberg project (<https://www.the-iceberg.org/>)

Table 1.6 Impact of Major Events on Hotel Performance in NewcastleGateshead

Name of event	Date	Average hotel revpar achieved	Average hotel occupancy achieved	Average room rate achieved
Weekend of Sport: Great North Run, England vs. Italy rugby, Velo North cycling event	Sept. 2019	£147.97	96%	£153.77
Year prior: Great North Run 2018	Sept. 2018	£168.17	96%	£175.12
Example of different weekend in Sept. 2019	Sept. 2019	£61.01	84%	£72.92
World Transplant Games	Aug. 2019	£57.72	86%	£67.19
Year prior	Aug. 2018	£42.30	73%	£57.72
'This Is Tomorrow Festival' 2019	May 2019	£92.54	91%	£101.31
'This Is Tomorrow Festival' 2018	May 2018	£93.84	95%	£99.04
Example of different weekend in May 2019	May 2019	£57.19	71%	£80.30
European Rugby Championships (Heineken Cup)	May 2019	£161.17	97%	£166.70
Year prior	May 2018	£69.66	86%	£81.03
Tall Ships Sunderland	July 2018	£64.74	88%	£73.39
Year prior	July 2017	£55.91	84%	£66.51
Ed Sheeran concert at St James Park: 150,000 people over 3 nights	June 2018	£118.45	98%	£121.24
Year prior	June 2017	£48.19	68%	£71.44
Rugby Magic Weekend	May 2018	£134.56	96%	£140.24
Rugby Magic Weekend	May 2017	£116.81	96%	£121.36
Same weekend in 2019 without Magic Weekend	May 2019	£67.16	74%	£90.64

Source: NewcastleGateshead Convention Bureau www.NewcastleGateshead.com/meet

Table 1.7 Direct impacts of top 25 countries

Rank	Country	Direct spending (billions US\$)	Direct GDP impact (billions US\$)	Direct jobs (000s)	Total participants (000s)	Average spend per participant (US\$)
1.	United States	325.0	184.2	2,489	252,600	1,287
2.	China	132.4	87.8	1,844	213,816	619
3.	Germany	123.7	71.4	997	149,796	826
4.	United Kingdom	92.6	51.5	774	120,164	770
5.	Japan	61.1	32.4	374	95,493	640
6.	Canada	33.1	19.3	229	49,538	668
7.	Italy	32.5	17.7	250	56,410	576
8.	Australia	30.1	15.2	193	41,755	722
9.	France	28.6	14.6	192	44,537	642
10.	Mexico	25.4	18.1	516	31,359	810
11.	Sweden	13.7	9.1	90	17,191	798
12.	Spain	12.0	7.5	83	22,151	542
13.	Brazil	10.9	7.6	172	30,623	355
14.	South Korea	10.1	7.0	83	18,124	557
15.	Argentina	9.8	5.9	108	24,319	401
16.	India	9.4	4.7	143	33,879	276
17.	Indonesia	6.3	3.9	104	21,431	296
18.	Russia	5.4	2.9	83	14,854	367
19.	South Africa	5.4	2.4	73	16,975	319
20.	Turkey	4.6	2.0	37	12,734	363
21.	Nigeria	4.2	2.0	52	15,224	276
22.	Thailand	4.2	2.6	123	12,935	323
23.	Saudi Arabia	3.9	2.3	40	8,363	466
24.	Netherlands	3.8	2.0	43	5,089	743
25.	Singapore	3.7	1.8	32	4,412	834

Source: Events Industry Council (2018, p.13)

1.8 Event Impacts and Legacies

Speaking at a reception held by the Business Visits & Events Partnership in October 2010, Kevin Murphy, then CEO of ExCeL London, said:

“We have a rich history of creating some of the most iconic and memorable events ever witnessed. And that is all part of our unique heritage. It is something we as a nation excel at, and we are rightly celebrated for doing so. And, because we are the best at it, with a hard-earned global reputation, leaders from Industries around the world want to hold their events here and bring together their greatest minds.

So, when a medical congress comes to London, we see thousands of the world’s most talented and experienced surgeons and doctors in our capital, sharing their knowledge and skills. When a technology conference is held in Brighton, the brightest young stars and global brands gather to discuss their future in our city.

And, when the Commonwealth Games come to Glasgow and the SECC in 2014, the world will watch and the legacy will remain. And that is the key word – legacy.

By attracting events from around the world, their delegates not only bring that economic benefit that is so vital to our economy, spending on everything from hotels to transport, restaurants to attractions. They bring their own global leaders and thinkers to discuss, debate, learn and share. And, by doing so, they engage with our own leaders and institutions in their particular fields: medicine, science, technology, aerospace, communications, finance and many others. Leaving that invaluable legacy of knowledge and making connections that will last for decades and influence our communities for generations.”

In the years since Kevin’s speech,

much greater attention has focused on the positive legacies that events can deliver, although a report entitled ‘Business event legacies – JMIC Case Study Project Report’ compiled by the University of Technology Sydney (UTS) on behalf of the Joint Meetings Industry Council (published May 2019), claims that there is still a ‘significant mismatch’ in how governments measure the value of business events and the true value delivered by conferences, congresses and international trade shows (Foley, Edwards, Jasovska & Hergesell, 2019).

The JMIC/UTS report has, according to the JMIC President Kai Hattendorf:

“...formally documented a concept we have been promoting for some time, namely that these events are all about economic, academic, professional and community enhancement outcomes and that a strategic approach to hosting such events can pay a broad and important role in advancing the development prospects of destinations around the world. As a result, these destinations and the governments that represent them need to re-think their engagement with the industry and how they can best use and invest in it for the overall benefit of their respective communities.

What we hope and believe we have accomplished is to identify some real and measurable values and the practices that are needed to properly document them in the future. As the credibility of such measures increases, so will the prospects that governments will position them properly as key elements in their economic and community development strategies.”

The report’s authors, UTS Associate Professors Carmel Foley and Deborah Edwards, concluded:

“Business events have long been judged under the narrow assumption that their legacies are best measured

in terms of hotel rooms and cups of coffee. Governments, in particular, have largely focused on what is commonly known as the tourism contribution, which ignores the significant scientific and research value on offer – value that directly drives economic development, creativity and innovation. Our research also shows that these benefits have a multiplying effect.”

The three-year study shows the global business event industry is supporting broader agendas, in particular building knowledge economies, encouraging industry innovation and enhancing community well-being. But until now there has not been a coordinated, global effort to measure and document these benefits in ways that could be used to advocate to governments and communities about the important role played by business events. **The report authors concluded that “these findings confirm that governments need to re-think the way they measure and value the business events sector”.**

The report also identified barriers to achieving lasting legacies, such as organisers neglecting to set long-term objectives or look beyond internal organisational goals. The researchers developed six ‘Golden Rules’ for business events to achieve successful event legacies (Foley et al, 2019, p.46):

1. **Involve stakeholders in setting legacy agendas**
 - Stakeholders may include, for example, government, local and global associations, industry leaders within the destination, leading researchers within the destination, conference organisers, conference bureaux and venues
2. **Coalesce legacy design around problems, issues, opportunities**
 - Identifying key industry and/or community issues and

opportunities is important for uniting stakeholders behind legacy initiatives

3. **Set legacy objectives**
 - Legacy objectives need to be set in order to plan for their execution. It is true that many conferences will yield legacies regardless of whether or not they have been planned for. But the failure to set objectives can mean lost opportunities making a difference
4. **Execute legacy plans**
 - Once objectives have been set, there must be a plan for ensuring the legacies are realised. Planning for the evaluation of legacy outcomes is essential
5. **Evaluate legacy outcomes**
 - Different outcomes call for different methods of evaluation. Methods of data collection and analysis are set out in the appendix of the report. Partnering with a research specialist (university or consultant) is an excellent idea
6. **Disseminate legacy outcomes widely**
 - Legacy outcomes should be communicated widely.

Glasgow Convention Bureau has developed a bespoke research model designed to report the key impacts of conferences taking place in the city, championing the importance of legacy (Glasgow, 2016). Glasgow recognises the growing interest from the meetings industry on monitoring and profiling the impact and legacy from meetings and how that positively influences society, academia and industry in the host city. It contributed to the JMIC study on legacy initiatives summarised above. It has also produced a number of case studies to highlight the beneficial impacts of events held in the city, including:

- a. **The European Archaeology Association Conference 2015**
The European Archaeology Association Conference invited local companies to attend, including the Glasgow-based Scottish Universities Environmental Research Centre (SUERC). The staff from the SUERC were invited to present their papers to this prestigious group of archaeologists from across Europe and this, in turn, provided a platform for business to take place. SUERC secured a contract with the Bulgarian Academy of Science which commissioned a brief to carry out a commercial radiocarbon dating service. Without the conference taking place in Glasgow, the commercial opportunity would have been missed. It is worth recognising the benefits to local industry that a conference brings, specifically to local companies who do not normally follow a meeting when it moves from city to city but can benefit greatly by the meeting being 'on their doorstep'.
- b. **Diabetes UK 2016**
The Diabetes UK Professional Conference was held at the SEC from 2-4 March 2016 and, alongside the conference, Diabetes UK held a 'Know Your Risk' roadshow in the heart of the city. The roadshow helped 250 people to find out their risk of Type 2 diabetes with 33% of these being referred to their GP. Members of the public could visit the roadshow to find out their risk of Type 2 diabetes, free of charge, by answering some simple questions and having their height, weight and waist measured. Then the on-site dietitian was available with materials to help people reduce their risk where possible. The team at Glasgow Convention Bureau also got involved at the

roadshow itself and promoted the key public health messages on social media during the conference.

- c. **International Congress of Phonetic Sciences 2015**
The bid for this conference was led by local (conference) ambassador Professor Jane Smith, a world-leading professor of phonetics and sociolinguistics, who has spent the last 20 years using Glasgow as her research platform to study the changing landscape of the language. The bid and delivery team for the conference consisted of a consortium of Scottish universities including the University of Glasgow, the University of Strathclyde in Glasgow, Queen Margaret University in Edinburgh and the University of Edinburgh. As a direct result of the conference, relationships across the four partner universities have produced a new framework for working collaboratively, a formula which will be adopted for future academic projects.

1.9 Emerging and Future Trends in Events

Research specialist Fast Future (Talwar, Wells, Whittington, Koury and Kalle, 2018) identified a number of key driving forces shaping the future of events over the coming 5-year period. It suggested that there is 'potential for massive change and a need to re-think how the sector operates. Many developments have the potential to become major industry trends.' Such developments and changes include:

- **Business model experimentation** – in a world where new charging models are proliferating, there will be a growing pressure on events to bring greater creativity to bear. From paying based on the perceived value and seat auctions through to pay per session and results-based charging – the sector will be exploring a range of different attendee payment ideas
- **Robot realms** – events will make greater use of robots as mobile customer service assistants, kitchen staff, baristas, waiting staff, security guards and porters. We'll also see more robots featuring presentations and even delivering them. Within facilities, we might see drones capturing videos of the sessions, transporting goods and even moving people between sessions
- **#metoo charters** – positive action will be taken in the wake of the harassment and assault cases made public in 2017. Codes of conduct will appear covering behaviour at events, participants will be asked to sign these to confirm their adherence. Reporting of incidents will be made easier and more discreet, and offenders' organisations will be notified immediately when such issues arise
- **Silent conferences** – participants will be able to tune in to every parallel session via their personal devices and listen through their headphones from wherever they are in a venue. So, if the current session doesn't appeal, you can simply switch to listen to or watch another parallel session without leaving your seat
- **Events will have an increasingly interdisciplinary focus** – in many sectors, participants will tire of hearing the same industry speakers and vendors saying roughly what they said last year! In the search for inspiration to maintain attendance levels, organisers will invite inspiring people from different fields, arts, science, music, business, education, or engineering to share their ideas with participants. The convergence, between people coming from different fields, will contribute to more creative solutions for the complex problems of the future
- **Stress centres** – concerns over our mental wellbeing are rising across society and workplace stress is reaching epidemic levels in some sectors. Events will start to include facilities where participants can talk discreetly to counsellors and therapists about their issues
- **Big Brother** – events that gather large numbers of participants could become attractive to proponents of the growing Internet of Things (IoT) and smart city movement. Attendees of large events might earn rewards, discounts or actual money for agreeing to use tracking devices during business conventions, conferences or festivals. Attendee data would provide key insights to exhibitors, and non-participating marketers, for example those aiming at the business traveller. Marketers will place ever-greater value on knowing how participants spend their time, where they visit, who they talk to and how long for. Of course, this might all seem very intrusive and so it would need to be the choice of the individual attendee as to whether they were tracked or not. For event venues, large exhibition spaces might provide the perfect venue for IoT vendors to set up demonstrations and smart city simulations
- **Circular economies and zero waste** – the events industry will come under growing pressure and take greater action to alleviate food, energy and water waste. Scientific studies have shown that the earth's ecosystems are weakening due to inefficiencies in current economic structures and distribution systems. Events that put into practice the principles of circular economies and zero waste, philosophies that encourage reuse and discourage over-consumption, might have a powerful role to play in the future where natural resources, even food, could be in short supply
- **Paradise unplugged** – some events will be elevated to a luxury experience with technology-free policies that demand unplugging, disconnecting, powering down and 'off-gridding' for everyone. Events will set a tone of intimacy and authenticity by discarding free Wi-Fi and discouraging event hashtags, for example. The venues would provide a facility at check-in where participants can drop off their devices for the day and unplug, putting a total focus on the experience at hand.

CASE STUDY 1.2 Hay Festival 2016

The Hay Festival, held in the small Welsh town of Hay-on-Wye (population 1,500), is one of the world's top literary festivals. It brings together writers from around the world to debate and share stories in the beauty of the Welsh Borders. Hay celebrates great writing from poets and scientists, lyricists and comedians, novelists and environmentalists, and the power of great ideas to transform our way of thinking. Two former US Presidents have visited the Festival: Bill Clinton in 2001 and Jimmy Carter in 2008.

In 2016 the Festival lasted 11 days and generated £20.6 million of direct economic impact for Wales. It enjoyed a total spectator attendance of 246,000 from 82,000 unique visitors.

The Festival runs an 'Academy' programme for journalism and events students to work alongside industry professionals.

Research among participants to the 2016 Hay Festival found that:

- 96% of visitors 'will definitely return'
- 89% agreed that the Festival 'has a positive impact on the local economy'

The research also elicited that:

- Spectators attended for an average of 3 days, each spectator generating an average of 4 bednights
- Spectators had an average daily spend (non-accommodation) of £77, and an average spend on accommodation of £54 per bednight (per person)

The 2020 Hay Festival will be held from May 21 – 31.

Main source: www.eventimpacts.com/research

The article concludes:

"A powerful combination of economic, social, technological and environmental factors is ahead of us. For major events, festivals and conferences, this will require a fundamental rethink of all aspects of what is done, and how. Looking ahead and taking action quickly will be essential to avoid the risk of falling behind. The changes coming our way will provide opportunities for innovation and the potential to get ahead of the competition."

In a Raconteur supplement for the Times newspaper (Lidstone, 2019, p.7), Russ Lidstone, group chief executive of The Creative Engagement Group (parent group of events division WRG), explains how events are evolving to reflect a new culture of business. He writes:

'Events ought to be inspiring, immersive and provoking. When done well, they can utterly change the way an organisation is perceived and impact how engaged stakeholders behave.'

Like all companies, the blue-chip organisations we work with are

seeing a radical evolution in their workforce. Mobile and remote working, multi-generational teams, and the transparency required in the glare of social media mean businesses have had to evolve, and move from command-and-control to connect-and-collaborate.'

He goes on to describe how the changing nature of business and a new direction from innovative leaders needs to be reflected in events and he puts forward six 'lessons' that his company has learned to create more participation, increase engagement and deliver greater commercial effectiveness. They are:

1. **Move from 'Inform' to 'Involve'** – companies have to think much more about what an audience wants to get out of the event. Delegates don't want to be lectured, they want to be involved. I often say employees now work with their companies, not for them; so transparency and two-way communication are at the heart of the way we plan meetings. Therefore, businesses need

to be braver in providing the space and tools for that engagement.

2. **Extend beyond the event** – all engagement activity needs to reflect the multi-faceted, multi-screen, always-on communications landscape. Engagement starts before the event and continues afterwards, so we always aim to be creative with formats to recognise events as a part of an ongoing engagement programme. We help many clients to create eclectic formats to suit the audience environment. For example, we often encourage the capture and broadcast of film content from meetings, so our in-house hybrid broadcast team can engage those unable to attend, plus create thought-leadership content to support local and global post-event online media campaigns. Businesses can see the impact of the content well after the event has finished and engage with a larger audience, regardless of whether or not they attended. This drives participation and extends

reach, ultimately delivering greater return on investment.

3. **Use physical space to strengthen experience** – the physical environment for events increasingly needs to put people into the right mindset to receive content and experience messaging, rather than just hearing it. After all, they can listen online. Thinking about the physical flow of your event and how delegates are going to navigate the agenda or floorspace, as well as the use of touch, taste and smell, can have a huge impact on their experience.
4. **Let technology facilitate real-time agility** – an integrated solution for clients incorporating responsive technology enables us to adjust live experiences in real

time. While event apps have become standard, increasingly we are supporting clients to use RFID (radio-frequency identification) and anonymised facial recognition camera tracking technology to track delegate movement. This enables us to analyse data and adjust environmental flow or layouts in real time.

5. **Talk to the 'real self'** – alongside the business-orientated agenda, delegates are increasingly keen to learn and experience new ways of thinking about themselves and bringing their real selves into the corporate environment. This means providing breakouts or content that also recognises their life beyond the organisation. For example, for a healthcare

client, we delivered workshops on sleep management which demonstrated the importance of wellbeing in the workplace.

6. **Bigger speakers, smaller stages** – clients value meaningful content over potentially vacuous, shiny production with bells and whistles. This means having compelling speakers matters more than ever, but you also need to make the most of them. Rather than simple podium-based broadcasts, we encourage a compelling mix of keynotes, fireside chats, panel discussions and huddles, alongside off-site business visits. This requires a more agile approach, combined with exemplary production discipline.

CASE STUDY 1.3

MoneyPennies' Event Data

MoneyPennies is a Brighton-based supplier of high quality data on UK event organisers, tracking the staging of annual conferences, exhibitions and award ceremonies by 1200+ organisers (500 corporate and 700 association). It also works with UK and European venues as well as event industry suppliers to help fill availability. Its work includes researching the confirmed booking status for a calendar year of annual conferences, exhibitions and awards, and maintaining detailed buying profiles for the organisers of these events.

Data for the 2019 calendar year provides some valuable insights into booking activity by event organisers:

- Of the 1700+ events tracked by MoneyPennies, 1400 are annual conferences and awards ceremonies, and 300 are exhibitions
- 740 of the events have a duration of more than 24 hours
- 900 of the 1700+ events were booked into London venues; a further 400 were booked in Birmingham, Manchester, and other parts of the UK
- 100 events were booked into Europe and New York

- 181 bookings were for events held on a Monday, 160 for events on a Friday, 64 for Saturday and 58 for Sunday
- A total of 408 individual venues received bookings, including convention centres, conference centres, and hotels.
- 141 of these venues are in London and include venues such as historic, iconic and sporting venues as well as convention centres, conference centres, and hotels. The following London venues (in alphabetical order) received the highest number of bookings in 2019:
 - etc. venues
 - Grosvenor House
 - Hilton London Bankside
 - Leonardo Royal
 - Marriott Grosvenor Square
 - Park Plaza
 - Royal Lancaster London
 - The Brewery
 - Tobacco Dock

As the events being tracked are annual events, it is anticipated that the pattern for 2020 bookings will be similar.

For more information: <http://moneypennies.biz/>

1.10 BVEP Manifesto Recommendations

In advance of the 2019 General Election, the Business Visits & Events Partnership published (BVEP, 2019) 'A Manifesto for Britain's Events Industry' under the title 'Events Deliver Growth, Jobs and Opportunities'. The Manifesto contains a number of recommendations designed to further support and develop the UK's events industry with the overall aim of making Britain 'the leading European country for staging events'. The recommendations fall under five broad headings and are detailed below:

1. **Working Together to enhance the UK's position as a leading European country for hosting events**
 - a. Increase resources across government departments, government agencies, and within the devolved administrations dedicated to growing the value of events held in the UK
 - b. Implement the UK Government's International Business Events Action Plan to facilitate a comprehensive package of Government advocacy, cross-Government department working, supported by an augmented Events Growth Programme
 - c. Create a strong partnership with the Department for International Trade by placing the use of events as a central part of industrial strategy, international trade development, inward investment and business growth
 - d. Incorporate the events sector into the Creative Industries strategy promoting the use of Britain's creative talent and event organising services to be exported worldwide.
2. **Growing infrastructure, enabling greater access and increasing investment**
 - a. Undertake a comprehensive review of event venues to assess supply constraints against potential future demand to enable the UK to compete with international competitors
 - b. Help attract investment for new event venues and additional capacity to existing infrastructure, by offering fiscal incentives and relaxing planning regulations to speed up new developments
 - c. Ensure that any policy to free up public land includes local economic activity considerations such as multi-event venues and the wider use of fixed term temporary structures
 - d. Provide local authorities with adequate resource to offer subvention, where appropriate, and provide city-wide support, to include marketing, security, dedicated infrastructure, improved accessibility and integrated transportation.
3. **Creating a more competitive tax regime**
 - a. Reduce VAT levels on accommodation, conference and event services in line with international competitive levels
 - b. Reform the Tour Operator Margin Scheme to re-introduce a B2B opt-out option
 - c. Provide tax incentives for hosting overseas buyers and conference attendees where events are designed to create and support export-led trade and inward investment opportunities
 - d. Reduce Air Passenger Duty.
 - e. Safeguard funding currently provided by the EU in key sectors (e.g. scientific research, agriculture and the creative industries).
4. **Avoiding greater regulation**
 - a. Make movement of people engaged in the events sector as easy as possible, recognising their unique creative, logistical, marketing and service skills, ensuring the UK's creative and production talents are not impeded from operating world-wide and that the UK can attract those same skills and talents from overseas
 - b. Ensure no additional bureaucracy in transferring goods and business samples to conferences and exhibitions in the UK and overseas
 - c. Recognise the value to Britain's economy of business visitors attending business events in the UK, by facilitating their visits and not imposing any undue or onerous travel and entry restrictions
 - d. Reduce the cost and procedure for visa issuance to business travellers.
5. **Supporting the Industry in driving forward its skills agenda**
 - a. Support the recommendations of the Events Industry Board Talent Taskforce Skills Report
 - b. Establish SIC and SOC codes to enable analysis of the industry's workforce
 - c. Support the establishment of an independent Event Skills Body
 - d. Help promote the Events Industry as a desirable career.

A number of these issues and recommendations are explored and developed further in this report.

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THE COMPOSITION OF THE EVENTS INDUSTRY

2.1 Introduction

This chapter examines in detail the individual segments that make up the events 'industry', looking at their key characteristics and trends, volume and value data, innovative practices, and any issues affecting future growth.

The business to business (B2B) events sector can be characterised as extremely dynamic and an arena that embraces a wide spectrum of live events providing creative and valuable solutions for corporate customers. Solutions that show events are now used very much as experiential brand experiences delivering powerful and effective marketing and communication messages.

Business events also cover those events organised by membership organisations (trade and professional associations, institutes and societies, trade unions, for example), by academia, and by public sector entities such as government departments, local authorities, and the National Health Service.

The events organised range from off-site board meetings and company AGMs to association meetings, large scale medical and scientific symposia and congresses, and major exhibitions and product launches.

The travel associated with business meetings and events also forms an essential component of the live events sector.

However, the events sector is not confined to business to business events. There are also business to consumer (B2C) events as well as an array of leisure events ranging from sports to music to other cultural events, both indoor and outdoor.

This chapter will, therefore, cover:

1. Conferences and meetings
2. Exhibitions and trade fairs
3. Incentive travel and performance improvement
4. Corporate hospitality and corporate events
5. Outdoor events
6. Music events and festivals
7. Sporting events
8. Business travel

The Events Industry Matrix, Table 1.1 in Chapter 1, summarises the segments that make up the events industry, describing key characteristics, geographical and venue preferences, typical duration, volume and value data, and their principal outputs and benefits.

2.2 Conferences and Meetings

2.2.1 Definition and Background

In common with other industries, the conference and meetings industry comprises 'buyers' and 'suppliers'. The buyers in this case are conference organisers and meeting planners who buy or, more accurately, hire conference venues and related services in order to stage their events.

Most people within the conference industry refer to two broad types of buyer: 'corporate' and 'association'. There are also 'public sector' buyers who may be regarded as a discrete group, rather than being subsumed within the 'association' category. There is also a category of risk-taking, entrepreneurial conference organisers (also known as commercial conference organisers) who put together a conference and hope to be able to attract sufficient delegates for the event to be profitable. All of the above may also employ the services of various kinds

of 'agency' or intermediary to assist them in the staging of their events.

The term 'corporate' is used to describe conference organisers (often called meeting planners) who work for corporate organisations. Corporate organisations are companies established primarily to generate a profit and thus provide a financial return for their owners, whether these are the proprietors of a family-run business or the shareholders of a large publicly quoted company.

The term 'association' organiser or buyer covers those representing a wide range of organisations, including:

- Professional or trade associations/institutions (whose members join because of their employment)
- Voluntary associations and societies (whose members join primarily to further an interest or hobby)
- Charities
- Religious organisations
- Political parties
- Trade unions.

Associations are formed and operate at different levels. Many are purely national and restrict their memberships and their activities to one particular country. But, and perhaps increasingly in our global, shrinking world, these national associations are establishing links and relationships at a continental level to form bodies with memberships and spheres of influence at this wider, regional level (e.g. the European Federation of ... or the Asian Association of ...). In other cases, truly international associations exist whose members are drawn from all corners of the world.

The public sector (sometimes referred to as 'government') has much in common with the association sector (and indeed, for research purposes, is often subsumed within data for the association sector), covering organisations such as local authorities, central government departments and agencies, quangos, educational bodies, and the health service.

The fourth type of buyer is one whose role is essentially that of an entrepreneur operating within the conference sector. In other words, someone who identifies 'hot topics' in the business or academic world

and then plans and produces a conference at which the topics can be presented, discussed and debated by high profile speakers and experts. The entrepreneur aims to sell places at the conference to anyone interested in paying to attend.

The suppliers to the conference and events sector include a multiplicity of organisations, ranging from conference and event destinations and venues to specialist agencies and contractors, accommodation providers, transport companies and a myriad of niche operators.

2.2.2 Key Sectors of the Economy for Meetings and Conferences

While meetings and conference activity is to be found in all industry sectors, those which have traditionally been prominent in generating such activity include:

- oil, gas and petrochemicals
- medical and pharmaceuticals
- computing/IT and telecommunications
- automotive manufacturing and other manufacturing
- financial and professional services
- food, drink and tobacco
- travel and transport.

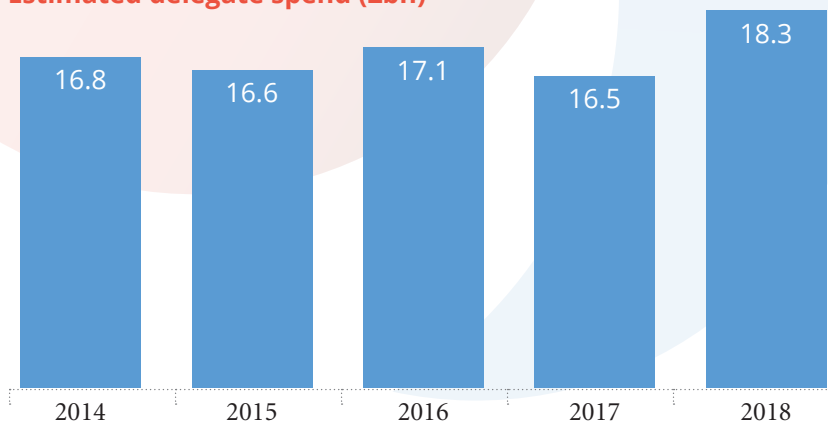
New industries and technologies expected to be important drivers of future meetings and conferences include:

- Creative industries, art, architecture & design, marketing, media, film, photography, music and the arts, publishing
- Renewable energy
- Robotics
- Biotechnology & specialist sciences
- Electronic currency & finance
- Education – distance learning – virtual universities
- Security.

Table 2.1

Estimated volume of the conference and meeting market				
	Non-staying	Staying - destination	Staying - residential	Total
Delegates (m)	63.0	11.1	21.1	95.3
Delegate days (m)	92.0	16.2	44.6	152.8
Delegate expenditure (£bn)	6.8	2.9	8.6	18.3
Share (% of market)				
Delegates (%)	66	12	22	100
Delegate days (%)	60	11	29	100
Delegate expenditure (%)	34	17	49	100

Figure 2.1
UK Conference and Meeting Market - Estimated delegate spend (£bn)



Source: UKCAMS 2019 Report

2.2.3 Volume and Value of the UK Conference and Meetings Market

The 'UK Conference and Meeting Survey' (UKCAMS) (Rogers & Smith, 2019) provides crucial market intelligence on the UK meetings and conference sector, covering volume and value and key trends data from a supply-side or venue perspective. The research is based on a UK conference venue universe of an estimated 3,500 primary venues ie. those venues for

which meetings and conferences form a significant part of their revenue and which are proactive in promoting their meeting facilities in the marketplace. UKCAMS has been undertaken annually since 1993 and, as well as volume and value data, UKCAMS highlights key market trends identified by venues.

Some of the main findings from the 2019 report, based on UK venues' performance in the calendar year 2018, are summarised below:

2.2.3.1 Overall Volume and Value of the UK Conference and Meeting Market

In 2018, there were an estimated 95.3 million delegates accounting for approximately 152.8 million delegate days – see Table 2.1. These delegates generated an estimated £18.3 billion of direct expenditure in venues and the wider destination – see Figure 2.1.

2.2.3.2 Average Number of Events per Venue

There were an estimated 428 conferences and meetings per venue in 2018. This was up on 2017 and above the average for the last decade (382 events).

The most common number of events achieved by venues was 100 or fewer – 28% of venues achieved this in 2018. This was the same as 2017 (28%).

The proportion of venues hosting more than 1000 events a year was up on 2017 (13% compared to 8% of venues).

Conference and training centres (640 events) and hotels (453 events) hosted higher than average numbers of events.

Purpose-built centres and unusual / multi-purpose venues tended to host the least number of events (an average of 230 and 245 events

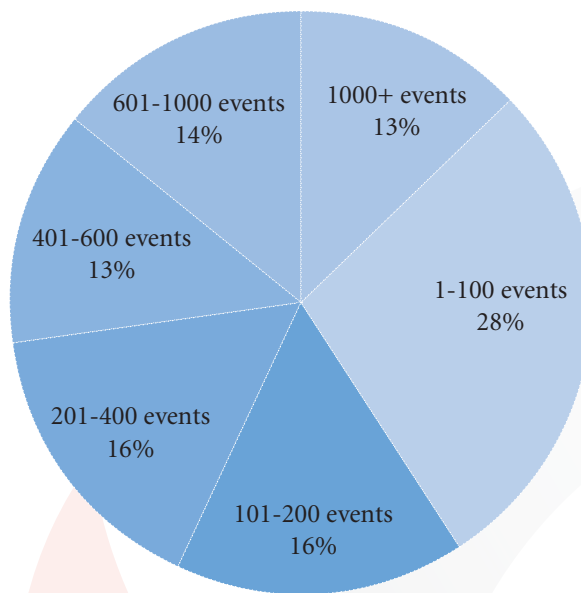
respectively), although it should be noted that, in the case of purpose-built centres especially, these are often larger, multi-day events.

Over half of events (58%) took place in hotels in 2018 – this reflects both the large number of hotel venues (they represent 52% of venues) and also their higher than average

numbers of events per venue. Conference / training centres and unusual / multi-purpose venues are the next most important groupings, accounting for 19% and 18% respectively of event market share.

Figure 2.2 shows the number of events per venue as a percentage of all venues.

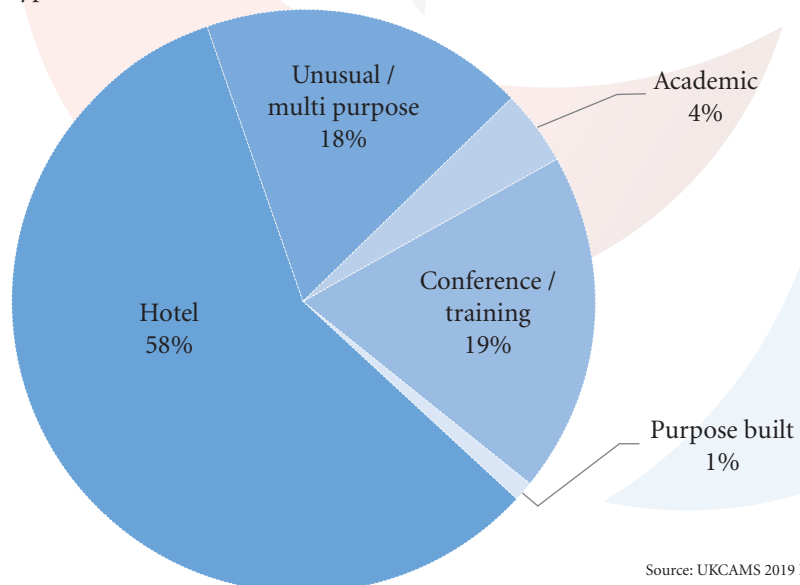
Figure 2.2
No. of events per venue (% of all venues)



Figures for all venues are based on weighted data (Sample = 369)
Source: UKCAMS 2019 Report

Figure 2.3
Share of events market by venue type (% of events)

Figure 2.3 shows the share of the conference and meetings market by different types of venue.



Source: UKCAMS 2019 Report

2.2.3.3 Levels of Residential and Non-Residential Business

In 2018, two-thirds (66%) of conference business was undertaken on a non-staying basis (i.e. with no stay either at the venue or in the destination).

In terms of conference business that was overnight, delegates tended to stay at the venue in question. About a fifth (22%) of conference business in 2018 was residential.

The pattern was the same as 2017.

Figure 2.4 shows the levels of residential and non-residential meetings and conferences as a proportion of all business.

2.2.3.4 Event Size

Most events (66%) had 50 delegates or fewer – the majority of these were for fewer than 20 delegates. The average event size was 72 delegates. This was the same as 2017.

Approximately 6% of events had more than 200 delegates.

2.2.4 UK Corporate and Association Meeting Planner Research

Research among UK corporate and association meeting planners is published by CAT Publications as the 'British Meetings and Events Industry Survey' (Meetpie.com, 2018). The 2019 report (covering the twelve-month period to October 2018) had 174 respondents from the corporate sector and 175 from the association or 'not-for-profit' sector. The latter were comprised of:

- 58.3% professional and trade associations and institutions
- 12.0% government or public sector organisations
- 29.7% other not-for-profit organisations such as charities, political parties, religious groups and trade unions.

Some of the key findings of the research include:

2.2.4.1 Budgets and Budgeted Delegate Rates

Both the corporate and association sectors showed an increase in average daily delegate rates, compared with the previous year. Average daily budgeted rates for associations rose to £51.78 from £43.62, and for the corporate sector were £58.71 from £52.39. This can in part be explained by venue choices as city centre hotels, residential conference centres and luxury venues were the most popular venue types.

24-hour delegate rates also increased, from £127.55 to £135.62 for associations and to £157.21 from £151.05 for corporates. However, these results were based on a relatively small sample as just 28% of associations and 34% of corporates organised residential events.

Annual budgets also increased from £131,151 to £160,043 for associations and from £188,043 to £191,346 for corporates. Predictions for the twelve-month period to October 2019 were very different for the two sectors with corporates anticipating an increase of +7.5% and associations a decrease of -7.5%.

2.2.4.2 Duration of Events

84% of both corporate and association sector respondents said that the duration of their events had not changed. Although not asked specifically in the 2019 BMEIS research, the average duration of events has previously been around 1.5 days, with many events non-residential.

2.2.4.3 Lead Times

The average lead time for associations was nine months although 32% of respondents were organising their events with lead times of more than 12 months. For corporates, lead times averaged

7 months and 56% of corporates organised events within six months.

2.2.4.3 Top UK Destinations 2017-2018

London remained the most used destination for both corporate and association sectors, with Birmingham in second position and Manchester third, followed by Leeds in fourth position (from seventh the year before) and Glasgow in fifth place. The report states that 'the strong influence of infrastructure, accessibility and general appeal is clear together with universities with influential academics and ambassadors for associations. The high presence of corporate players in individual destinations also influences their position in the chart'.

2.2.4.4 Preferred Venue Types

City centre hotels remained the most popular venue types, with both associations and corporates, followed by dedicated conference centres and luxury venues. Multi-purpose venues and unusual venues were also more popular than in previous years – perhaps due to the rise in experiential events. Universities/academic venues and purpose-built convention centres were more popular with the association/not-for-profit sector.

2.2.4.5 Key Factors Influencing Venue Selection

The top factors influencing the choice of venue continue to be access, location and price. Capacity and quality of conference facilities were both more important than in the previous year.

2.2.4.6 Top Ten Factors Contributing to a Successful Event for Delegates

The chart (Figure 2.7) illustrates that the production of interesting events with relevant content was rated most highly as contributing to success by both sectors. Perhaps surprisingly, the quality of service and of food were viewed as less significant.

Figure 2.4
Levels of residential and non-residential business (% of business)

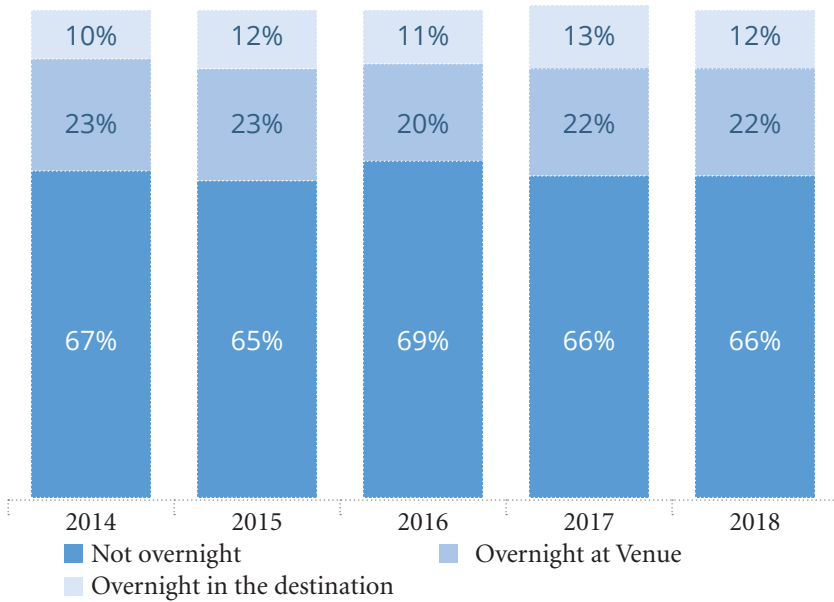


Figure 2.5
Top UK destinations in 2017-2018

In this Figure the upper bars indicate corporate respondents and the lower bars association respondents. The percentages show what proportions of corporate and association buyers used the listed destinations in 2017-2018.

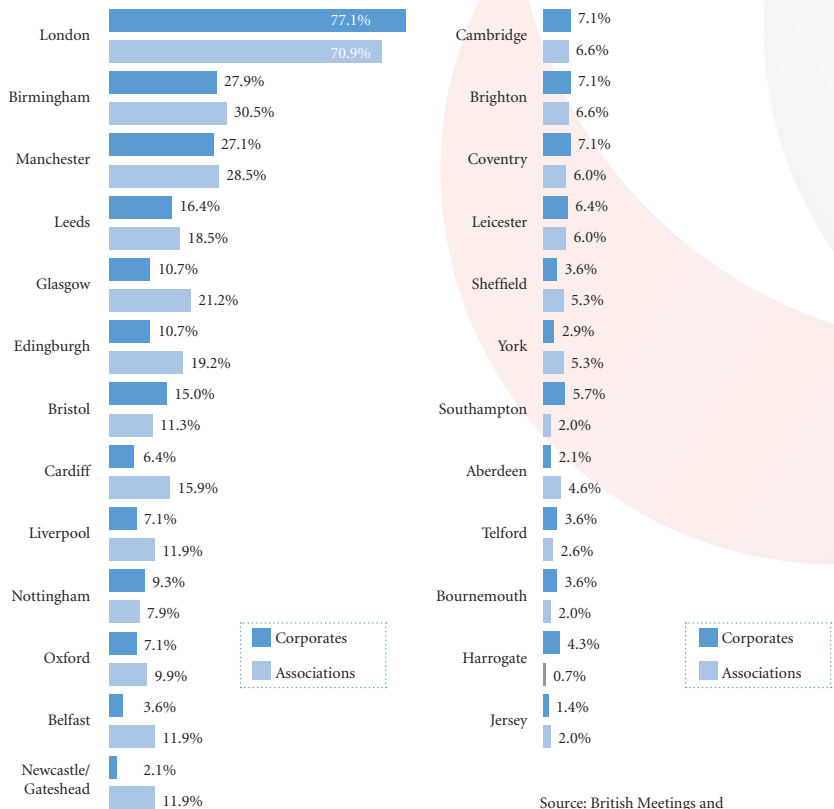


Figure 2.6 Key factors influencing venue selection

In this Figure the upper bars indicate corporate respondents and the lower bars association respondents.

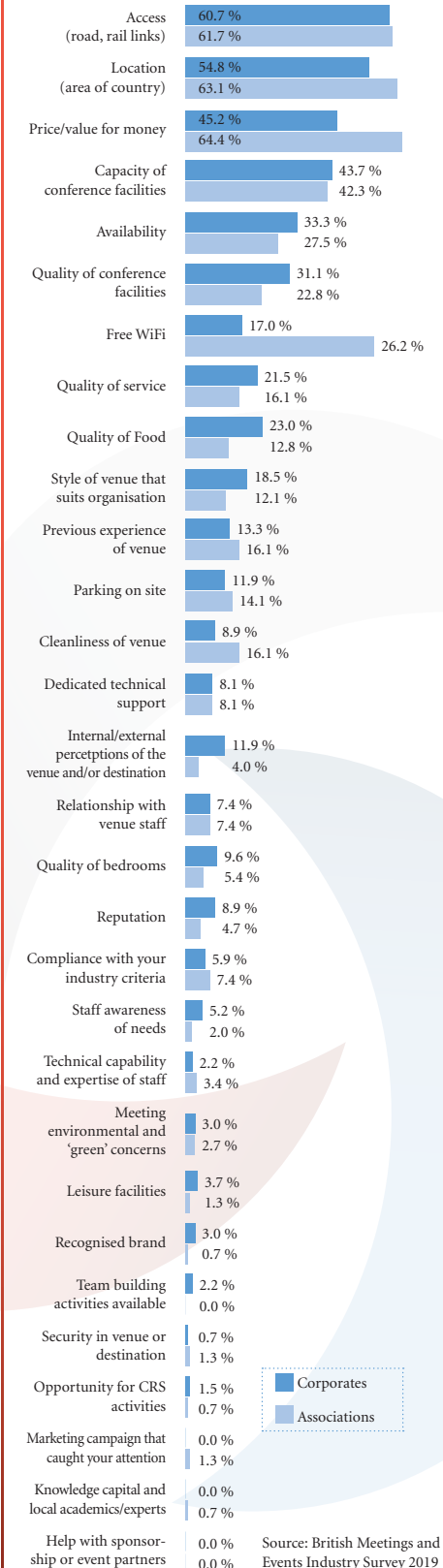


Figure 2.7 Top ten factors contributing to a successful event for delegates

Contributing factors	Ranking	Corporates	Ranking	Associations
Producing interesting events with relevant content	1	51%	1	78%
Content relevant to their work and daily life	2	39%	2	55%
Inspiring and original sessions/presentations	6=	20%	3	31%
Networking with peers and colleagues	3	33%	4	29%
Ease of access and travel	4	30%	5	24%
The (quality of) venue	5	25%	6	19%
Cost of attending	9	12%	7	17%
Networking with industrial experts	6=	20%	8	13%
Quality of service	10	7%	9=	12%
Food	8	14%	9=	12%

Source: British Meetings and Events Industry Survey 2019

2.2.5 International Association Congresses and Meetings

2.2.5.1 ICCA Research

In its 2018 publication 'A Modern History of International Association Meetings – Update: 1963 – 2017', the International Congress and Convention Association (ICCA) describes the structure and trends in the international association meetings and congress market (ICCA, 2018). It says:

'The market covers a wide range of meeting types and categories: medical meetings (the largest segment); scientific, other academic fields; trade organisations; professional bodies; and social groupings. In terms of size, budget, duration and complexity, there are massive variations between and within categories. However, some similarities can be identified:

- Almost every 'speciality' has an association which holds one or more meetings
- Most associations have meetings that are repeated at regular intervals. These can be annual, biennial, etc
- The destinations rotate. They rarely return to the same destination within a very short period of time
- The local stakeholder e.g. the national association, is often the one who initiates the hosting of the meeting. If the national association proves difficult to motivate to organise the meeting, the chances are high that the meeting will be scheduled elsewhere
- Association meetings have very long lead times. It is not unusual to find lead times of 5 years or more
- It is estimated that a growing minority of about 25-30% of

the decision-making processes no longer include an official bidding procedure, but have a 'central initiator' who selects the location and venues based on pre-determined and strict criteria.

It is estimated that there are approximately 23,000 different association meetings organised on a regular basis. The ICCA Association Database has collected information on approximately 90% of them.

Exponential growth trend in the number of international association meetings continues

Since 1963 the number of meetings in the ICCA Association Database has grown exponentially by approximately 10% each year, which means the number of meetings has doubled every 10 years. The Database contains 225,243 meetings taking place between 1963 and 2017. 1,718 (1%) of these meetings took place in the period 1963-1967, and 65,182 (29%) in the period 2013-2017. See Figure 2.8.

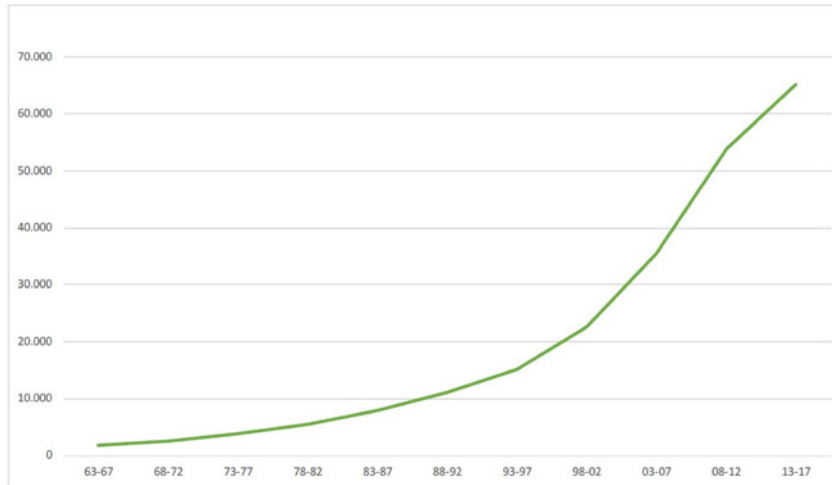
Europe remains the most popular region for meetings

In the last 55 years, Europe has consistently attracted the highest number of meetings per region. However, Europe's market share has gradually declined from 71.8% in 1963-1967 to 53.6% in 2013-2017. In comparison, Asia has seen a slow and steady rise in market share, with an average increase of 2% per decade, showing 10% growth over 55 years from 8.4% (1963-1967) to 18.5% (2013-2017). See Figure 2.9.

Most popular countries and cities change in five-year period

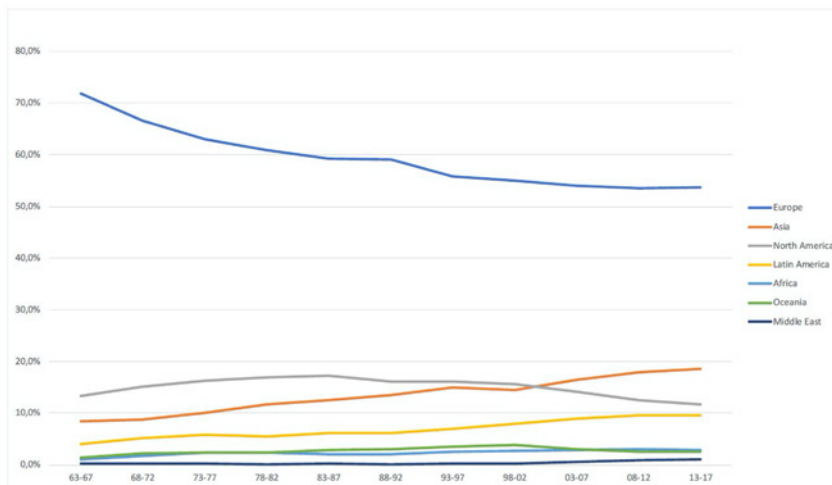
Compared with the period 2008-2012 there are some changes when it comes to country ranking during the period 2013-2017. Spain dropped from third to fifth place

Figure 2.8 Total Number of Meetings in ICCA Database 1963-2017



Source: ICCA Data

Figure 2.9 Number of Meetings per World Region



Source: ICCA Data

in the rankings, being overtaken by the United Kingdom and France, who move up to places 3 and 4 respectively.

As in the country ranking, there are some changes in the city ranking when comparing the same two periods. Regarding the top 5 cities: Barcelona has dropped two places to fifth place, as Berlin moved one position up to third. London has entered the top 5 and moved two places up to fourth position at the cost of Singapore, who dropped one place to sixth.

Average number of participants per meetings decreases

The clear trend observed five years ago continues with meetings getting smaller and smaller. From 1,263 participants in the period 1963-1967 to 409 in 2013-2017, we can see a significant decrease of 66% in the average number of participants at international association meetings. In general we can state that there are more, but smaller, association meetings taking place over the years.

The decrease in popularity of the Conference/Exhibition Centre has continued throughout the last 5 years. This venue type has been overtaken by the Universities, which have showed a sharp increase in the last 15 years and become the second most popular venue for association meetings.

Number of annual meetings skyrockets over 5-year period

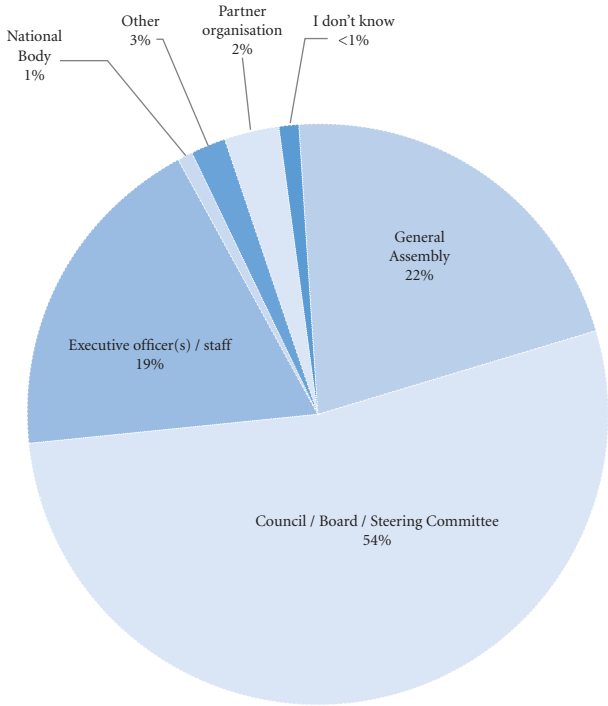
The relative number of annual meetings has drastically increased over the past 55 years, from 36.1% in the first 5 years to 59.8% in the last 5 years. We can say that the relative number of meetings taking place less than once every 2 or more years is decreasing.'

2.2.5.2 UIA Survey on International Meeting Issues

During 2018 the Union of International Associations (UIA) undertook its seventh large-scale survey on issues encountered by international organisations and associations when holding meetings (UIA, 2018). The survey is designed to help all involved in the process of organising international meetings to get a sense of changes over the years and the challenges of the current environment.

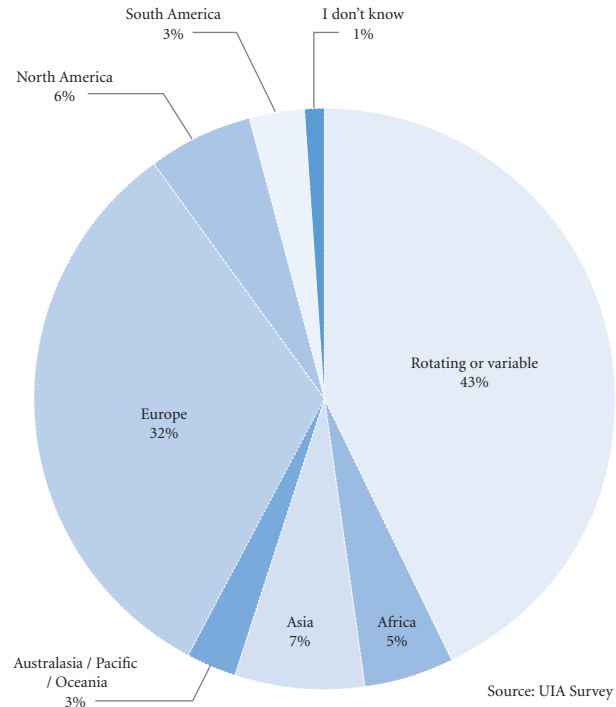
Some of the key findings from the 2018 research are shown in the following charts.

Figure 2.10 Who Makes the Final Decision on Destination/Location/City/Country of this meeting?



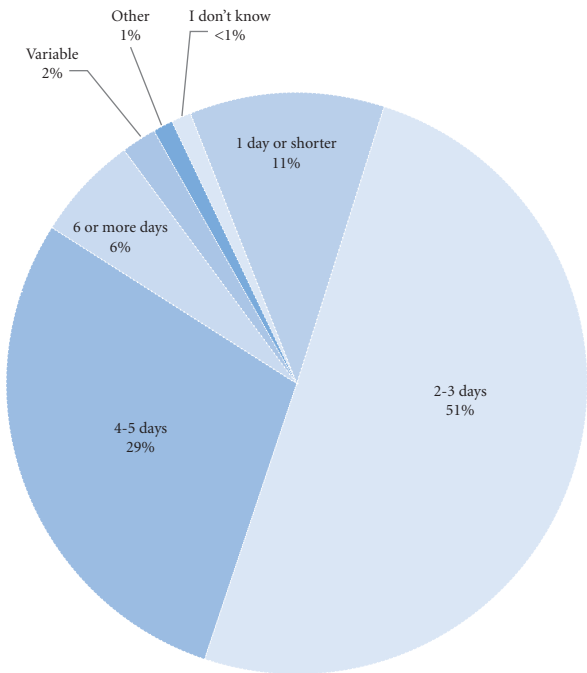
Source: UIA Survey 2018

Figure 2.12 Where Is the Meeting Held?



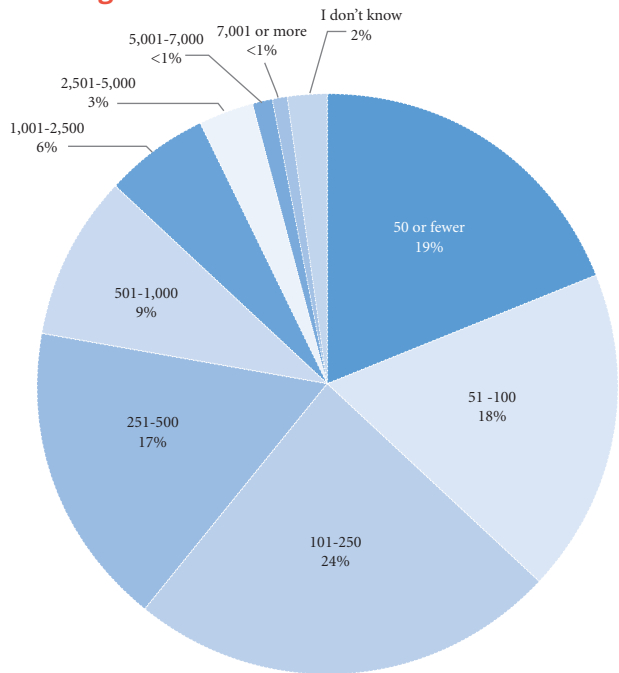
Source: UIA Survey 2018

Figure 2.11 What Is the Usual Length of This Meeting?



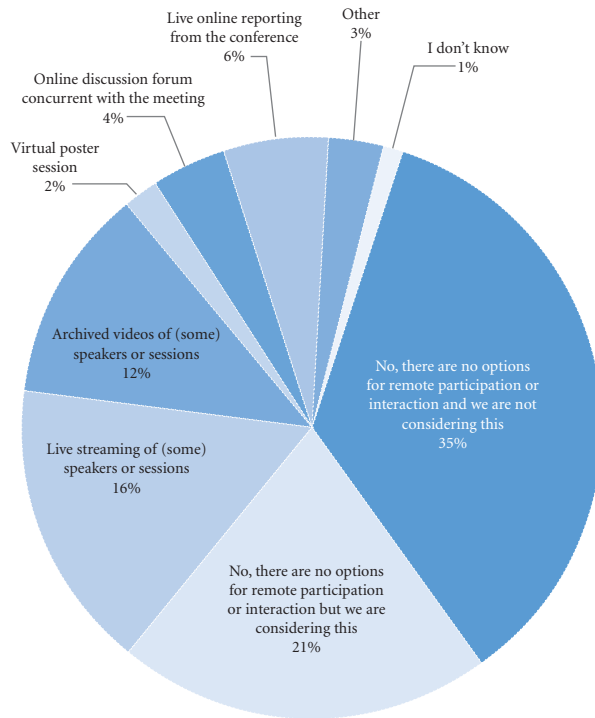
Source: UIA Survey 2018

Figure 2.13 How Many Delegates (excluding accompanying persons and staff) Attend This Meeting?



Source: UIA Survey 2018

Figure 2.14 Are There Opportunities for Online/Virtual Participation in Your Events?



Source: UIA Survey 2018

The full UIA report can be accessed at:
<https://uia.org/publications/meetings-survey>

2.2.6 Trends in Conferences and Meetings

2.2.6.1 Destination Sector Alignment in Conference Bidding

One of the important trends in recent years is the strategy being adopted by many UK cities (along with many overseas destinations) to align their bidding for events with the strengths of their particular local economy. This is not just local industry and commerce (ie. manufacturing and service sector businesses) but also the local 'knowledge economy', encompassing universities, research centres and institutes and so forth.

For example, London & Partners (London's destination marketing organisation) has set its sights on

growing four specific industries: technology, life sciences, the creative industries, and financial/banking/business services. Through inward investment, it hopes to make London a world leader in these sectors – and an integral part of its strategy includes attracting high profile international events. London & Partners believes that, by focusing on the four sectors in which London is already strong, it will gain more support from the city to attract congresses and events from these sectors. It maintains that meetings and events can support foreign direct investment and growth in these sectors, have a take-up effect on study and create and support new jobs.

The NewcastleGateshead Initiative's Convention Bureau is aligning its business events strategy with its

inward investment strategy and proactively seeking events that are in line with the destination's inward investment sector strengths: health and life sciences, creative and digital, and marine and offshore technologies. Paul Szomoru, Director of Tourism and Business Events for NGI, comments (Szomoru, P., 2015):

“Driving this approach forward requires a lot of new, uncharted collaboration and partnership: inward investment teams in local authorities and in NGI, the Department for International Trade (DIT), the universities, Chamber of Commerce, Confederation of British Industry (CBI), the Federation of Small Businesses (FSB), often people and organisations who may never have been aware of (why would they be?) the economic benefits of business tourism and the work of NewcastleGateshead Convention Bureau to attract MICE business to the region. The key is to demonstrate how business tourism benefits their own agendas and goals.”

The Australian city of Melbourne is globally renowned as a knowledge, research and innovation capital, excelling in medicine, science and health research and development (Rogers & Davidson, 2015). A flourishing innovation community, Melbourne is home to more than 260 biotechnology companies, 13 major research institutions and ten teaching hospitals. The Biomedical Precinct is one of few such concentrations of research excellence worldwide. The city's standing as a leader in science and medicine – Melbourne has yielded four Nobel Prize winners in medicine and physiology – is one of the major factors in attracting scientific conferences and medical conventions. For associations seeking to attract delegates to these events, access to Melbourne's research institutes and academics provides exceptional keynote speakers, a strong education programme and knowledge exchange that leads to

far-reaching legacies. Melbourne Convention Bureau's positioning campaign, 'Melbourne IQ: The Intelligent Choice for Conventions', is designed to highlight the intellectual capital within the destination and the city's strengths as a centre of excellence for research and development in the medical, science, technology, engineering and education industries. 'Melbourne IQ' continues to evolve to deliver a 'unique and compelling position' for Melbourne as a business events destination and it has contributed to Melbourne securing a number of major international congresses.

Other major trends noted for the international conference and meetings or 'MICE' industry in 2019-2020 are described below.

2.2.6.2 Benchmark's 'Top Meeting Trends for 2019'

Benchmark is a US-based global independent hospitality management company, operating 80 hotels, resorts, and conference centres within its Benchmark Resorts & Hotels, Gemstone Collection and etc.venues brands. Benchmark's 'Top Meeting Trends for 2019' were (Benchmark, 2019):

Trend 1: Privacy is the #1 Technology Requirement of Planners Today! Superfast and reliable WiFi throughout a property is a must and every planner hammers hard at this in contract discussions as it can make or break a productive meeting. But it must be secure WiFi! Privacy and security of information for conference guests is paramount to planners. Not just the content of the meeting – the content of participants' personal communications too. Privacy and security is at the top of every planner's list!

Trend 2: Food for the Soul Food brings people together, whether they know each other already or are just getting acquainted. It's

about engaging and savouring the moment. Since conference guests tend to be curious and concerned with wellness, learning what food they are putting into their bodies is essential, and they come to the table well informed. Here's what they want in 2019: food that is fresh and locally sourced, in-season when flavour is most robust, presented in small bites, and enjoyed interactively family style. With informed consumers comes increased demand for growing dietary restrictions or preferences well beyond vegetarian and gluten-free. Paleo, keto, pescetarian, vegan and religious dietary requests are just the beginning of specialised conference dining this year, and chefs have taken note!

Trend 3: Don't Facebook me. Don't Tweet me? It's not that professional meetings planners aren't sociable.

They are. It's just that email by far continues to be the most preferred method of communication – it's their preferred choice! What's new, though, is that they don't want to be contacted for business by social media, period! So, don't Facebook them, or Tweet, or Instagram. Be respectful of a planner's time and aware of how they prefer to communicate, including those who may or may not welcome a personal phone call. A simple and personal hand-written note will go a long way in making a memorable impression too!

Trend 4: Preference for Independents Flexibility, customisation, authentic and unscripted experiences all rank high in the minds of planners today, as does the feeling that independent properties excel in providing these for groups needing to create memorable and highly productive meetings. Another issue is also at hand with planning professionals relating to independent properties: commissions, which are generally higher with independents. As more meetings involve third-party

planners, this is of significant importance to meeting planners going forward.

Trend 5: What Millennials Want from Meeting Venues State-of-the-art technology, multiple plug-ins and USB ports for their myriad of devices in the meeting room, public spaces and in their guest room, entertaining and fun activities on property and outside, non-traditional seating and meeting arrangements to enhance engagement in meetings during the day – this is what millennials are demanding today. It's a sharing economy and this extends to millennials sharing guest rooms, resulting in fewer single room requests. The big reveal, though, is millennials want Privacy Rooms for personal conversations, sensitive phone calls and for personal needs.

Trend 6: Curated Travel Curated travel for groups (and their spouses/partners) on or off property is of very high importance. Even corporate executive leadership is weighing in with a growing desire for a trained and diverse workforce, and at the same time their younger workforce is valuing unique experiences. So even though groups may want to huddle on property after a day of intense meetings, companies are urging their employees to get out into the destination for a broader experience. Cabaret show in town anyone? Groups are requesting activities just like this.

Trend 7: Millennials Team Build Differently! Culinary teambuilding just gets hotter every year! Whether in the kitchen with the chefs learning about flavour balancing and fermentation, at the bar with mixologists, in the dining room at table, or outside for a picnic-like experience. Bringing groups together interactively and family-style as a culinary team is red hot. But planners are also looking for entertainment to be included in teambuilding so learning is not only instructive and

flavourful but great fun to enhance learning. Examples are lip sync battles, live interactive dinner shows, wildlife tours, hiking excursions, skiing, mountain biking, petting zoos and go-kart races on property... anything that, in an entertaining way, teaches new life skills that can be used at the office and home. Planners today increasingly desire to enhance the lives – and skills – of the ‘whole’ person.

Trend 8: Cocktails, S’mores and Barges Believe it or not, the most popular after-hours meetings group scene is gathering around an outdoor fire pit on property, kicking back and relaxing with colleagues over cocktails and s’mores. Doing something, anything, outdoors and nearby is how today’s meeting participants want to ease into their evening. River and lake barges anyone? Groups love the relaxed pace on a body of water. So whether chilling at the venue or out for the evening, the key thing for groups is relaxing together and getting to know colleagues as people and not just co-workers.

Trend 9: Speedy Response and Pay Commissions Promptly Lightning fast response to RFPs (requests for proposals) is essential to winning business with planners today. A request that comes in in the morning better be responded to by early afternoon or the venue may lose that business opportunity to a competitor. Want to gain an edge over the competition, beyond rapid response? Pay commissions promptly, maybe immediately. Today many more meetings are being managed by third party planners with accompanying commissions demands. Respond swiftly and generously and win!

Trend 10: Work/Life Balance Wellness is huge with professional meeting planners today. Diet and healthy menu planning remain an active focus in negotiations. But wellness today is much more than

a proper diet – it’s about work/life balance. Planners believe a healthy mind and body helps enable productive participants. So yoga, meditation and breathing classes for meeting breaks are in growing demand, as is spiritual exploration.

2.2.6.3 PCMA Foundation and Marriott International’s ‘Future of Meetings and Events’

A 2019 study by Fahrenheit 212 for the PCMA Foundation and Marriott International under the title ‘Future of Meetings and Events’ (PCMA Foundation & Marriott International, 2019) identified five trends that will all play a significant role in the future of meetings and events. The five trends are:

1. **Emotional Intelligence – designing events with the end-user in mind.**
 - a. **Business event strategists (meeting planners):** With new, precise information on every participant, business event strategists will have to leverage data analytics to tailor the content of events such that it’s suitable for each individual, down to the right pace, amount of content, or style of interaction. Business event strategists will also use this information to better define potential attendees.
 - b. **Participants:** while there may be some privacy concerns when it comes to data collection, many participants are okay with their data being collected, as long as it is being utilised to optimise their experience. Participants’ expectations for tailored and relevant events will be higher than ever, down to the details. Every aspect of the event should feel just right for the participants in order to see
2. **Orchestrated Serendipity – engineering and embracing the unexpected for meaningful moments.**
 - a. **Business event strategists:** Meetings and events hold a unique opportunity to act as an escape from everyday, over-scheduled lives. Event strategists should embrace and even engineer the unexpected, turning away from agendas to create meaningful moments, content, and interactions that participants will value and remember. Event strategists will need to plan flexibly and curate serendipity.
 - b. **Participants:** As technology enables remote attendance and distraction, participants will look to in-person meetings and events for experiential magic. Consumers can access nearly any information at the fingertips, and no longer evaluate events based on the information that they obtain; professional development can happen anywhere. Instead, participants will look for events that offer engaging,
- c. **Venues:** Utilisation of data will become a differentiator for venues, helping them create the right spaces and experiences for not only the organisation hosting the meeting, but also each participant. Venues will leverage their interactions with participants not only at events, but at other touchpoints as well. Venues will also double down on their investments in employees, enabling them to deliver personalised and empathetic service.

the maximum individual ROI for the time invested.

exciting and unexpected experiences.

- c. **Venues:** Venues will win with atypical locations that give participants something new and exciting, unexpected culinary offerings, and embracing the environment to reflect serendipitous happenings in the world, including weather changes. Venues should also work to foster human interaction by designing spaces that encourage casual collisions and conversation.
3. **Multimodal Design – designing adaptation and iteration.**
 - a. **Business event strategists:** Content and space are becoming increasingly intertwined, and events' objectives will manifest in a space. Business event strategists will need to work closely with organisations to identify the right spaces for their needs, and then work with venues to make sure the content and the space support one another, learning about the capabilities of a space and helping to design accordingly.
 - b. **Participants:** As consumers expect spaces that are more compatible with their needs, they're looking for spaces that are not only right for them, but that are also flexible and able to change according to their liking. At events, participants will increasingly look for spaces that are designed for discrete needs, including wellness rooms, quiet work spaces, intimate settings, and loud, exciting spaces – each presented at the right time and to the right calibration.
 - c. **Venues:** Technology is doing away with static spaces, and

profitable spaces are those that can adapt by utilising 3D printing, adaptable lighting, and sensorial tech. Economic buyers will look for venues that are adept at change and that can support the needs of their event. The most successful venues must incorporate modular spaces that can change not only according to the event, but according to specific moments and activities.

4. **Bigger than Oneself –acting on a meaningful message.**
 - a. **Business event strategists:** An event must completely embody the message that it stands for, and the most meaningful, successful events will be impactful ones. Event strategists should embrace the message of an event and identify the right moments for the message to come to life. Consistency is key, and event strategists will need to ensure that every detail is aligned with an event's message, and that participants hear the message throughout.
 - b. **Participants:** With a wealth of choice in the brands at their fingertips, consumers have the ability to evaluate experiences based on values. Participants aim to identify with organisations that align with their values, and just as they choose brands with messages, participants will increasingly choose, and return to, events whose messages and values align with their own. Participants will look more to discuss and address serious societal issues at events.
 - c. **Venues:** The ease with which information can be exchanged leaves consumers hungry for information on

back-end operations. Venues will increasingly be chosen based on their commitment to ethical operations and values. An event that stands for sustainability will not choose a venue that fails to provide reusable water bottles, or is not thoughtful about food waste. Venues must be considerate and honest about their capability to support impactful events.

5. **Clear Sense of Place – leveraging geography for deeper enrichment.**
 - a. **Business event strategists:** with so much available online, consumers are putting additional value on the experiences that cannot be achieved on a computer or at home. Event strategists should think about events that allow for exploring surroundings, decreasing the emphasis on content to allow for adventure and outdoor exploration.
 - b. **Participants:** Averse to spending more time in sterile or office-like spaces, participants are looking for more experiential events that allow them to break free from their day-to-day lives, exploring a new place and connecting with new people. ROI is no longer assessed based on the content of an event, as this can all be accessed online today. Instead, it's based on the value and novelty of the experiences and connections.
 - c. **Venues:** The ease of travel leaves consumers hungry for the next destination, and the demand for non-traditional venues is on the rise. Venues can leverage this trend to become the 'home-base' of an event, offering these outside experiences

on the perimeter of their programming. The most successful venues will focus on non-traditional offerings and external experiences to enable exploration.

2.2.6.4 CWT M&E Future Trends Report 2020

CWT M&E, the global meetings and events division of CWT, predicts that the meetings and events industry is poised for an 8% growth in 2020, despite looming geopolitical and economic headwinds, according to its 2020 Future Trends Report (CWT M&E, 2019). Kurt Ekert, president and CEO of CWT, said in a statement to accompany the report:

“The need for live events is becoming more relevant than ever before. Face-to-face meetings are critical to establishing connections between brands and their customers, and employees and their companies, especially during times of uncertainty. Knowing how to manage risks globally while putting together an authentic and measurable experience for all participants will be key for success in this space in the coming year and beyond.”

The Future Trends Report identifies key developments in the industry in 2020, including:

- i. **Digitalisation** – event websites are being created at a rapid pace – up 52% year-over-year – as more customers utilise these sites to drive increased engagement. Mobile devices are also adding new functionality with apps that go beyond setting travel itineraries to allowing organisers to create a higher degree of personalisation for attendees. CWT M&E estimates the number of event apps created since 2017 has increased by 83%, while the percentage of attendees downloading apps rose from 50% in 2017 to 74% in 2019
- ii. **Demographics** – this emphasis on digitalisation is being driven by the changing demographics as millennials are poised to become the biggest group of business travellers globally from 2024 onwards. Right at their heels are the so-called centennials (born 1996 onwards), the first group that can claim to be digital natives as they have never known a world without the internet, smartphones and apps. “This younger group of travellers is all about experience, authenticity and participation,” said Derek Sharp, senior vice-president and managing director, CWT Meetings & Events. “Not content to merely ‘attend’ events, millennials and centennials use technology to actively ‘participate’ in the experience – pre-event, during the event, and post-event. Organisers are responding with innovations that put a premium on the ability to personalise experiences, coupled with ways of measuring the resulting engagement.”
- iii. **Authenticity** – when it comes to experiential events, including incentive travel, the report shows a move towards experiences that feel authentic, where travellers can immerse themselves in a destination like locals and not as high-end tourists. Hand-in-hand with this trend is the growing attraction of off-the-beaten-track destinations versus the usual tier one cities. This has raised some safety and security issues with 42% of travellers subjected to pre-travel risk assessments as part of the travel approval process, a 5% increase year-over-year.
- iv. **Global Programmes** – as global meetings and events programmes become more centralised, new technologies in the form of artificial intelligence and bots are transforming how these programmes are managed across multiple regions and markets. Organisations are taking advantage of these innovative tools to derive more visibility and real-time data and feedback. As technology shrinks timelines and response times, the result is a streamlined process that ultimately leads to better adoption and a changing mindset around meetings.

2.2.6.5 American Express Meetings & Events 2020 Forecast

The American Express Meetings & Events 2020 Forecast (American Express Meetings & Events, 2019) predicts that meeting professionals are looking aggressively towards 2020, as steady growth across all meeting types is forecast for a fifth consecutive year. The global forecast, based on a survey of more than 550 meetings and events professionals from around the world, and interviews with industry experts, contained the following key European findings:

- Overall European meeting spend is predicted to increase by 2.1% and cost per attendee per day is expected to rise by 1.9% for incentives and special events
- If budgets were to increase, 30% of those surveyed would focus on improving the onsite experience (up 5% from last year)
- Meeting planners are facing specific challenges relating to GDPR and the political uncertainty caused by Brexit.

Other general findings include planners indicating they would prioritise experiential elements over logistics to drive better engagement, as well as being keen to integrate technology in ways that mirror how attendees interact with technology

in their daily lives to create authentic event experiences. Meetings management policies will become increasingly robust in 2020, with compliance levels predicted to reach 85% across regions.

Gerardo Tejado, General Manager at American Express Meetings & Events, commented:

“Overall, it’s inspiring to see an optimistic outlook about the meetings and events industry as we look to 2020. Meetings and events have cemented their place as a critical driver of communications, growth and engagement for organisations of all shapes and sizes. The challenge for planners now lies in making more of what they have – creating a seamless experience for meeting attendees, using technology for an authentic purpose and meeting the demands for personalised experiences.”

2.2.6.6 ECM Meetings Statistics Report 2019

Meetings in Europe are increasing in number, but becoming shorter and smaller, according to the ninth edition of European Cities Marketing’s ‘Meeting Statistics Report’ (ECM, 2019). With statistics drawn from a sample of 41 cities, ECM’s new report recorded more than 56,000 meetings in 2018. Overall there was a growth of 2.9% in the number of meetings between 2017 and 2018, but the numbers of participants decreased by 3% and the number of participant days by 5%. Petra Stusek, European Cities Marketing President, said:

“In the bigger picture, international meetings and events have become instrumental for destinations to manifest their business clusters, their science and research communities and their cultural scene for global audiences.”

2.2.6.7 IACC ‘Meeting Room of the Future’ 2019 Report

Ethical operations and sustainable practices will be one of the most

important areas of focus for venues by 2024, according to IACC’s annual ‘Meeting Room of the Future’ report 2019 (IACC, 2019). The report brings together insights from over 250 meeting planners from five different continents.

A major concern raised by meeting planners was the amount of food waste that meetings and events generate, and how it is disposed of. Sixty-two per cent of respondents said that they will look at how a venue manages its food waste before booking.

The report also revealed a dramatic increase (up 8% from 2017 to 85% in 2019) in the number of meetings which are integrating new technology, such as audience participation apps, projection mapping and screen-sharing.

The IACC report also points to an increasing focus on experience creation. The rise in demand for experience-led meetings is being attributed to an influx of new generations, both attending events and also planning them. Younger generations are providing a driving force for change to meeting formats, breakout sessions and teambuilding activities.

Cyber security was revealed as another key topic – and an area of some concern – for meeting planners, with 27% of respondents stating cyber security will become a greater priority in the next three to five years. Seventy-six per cent of meeting planners reported that they are concerned about cyber security when implementing new technologies into their events.

2.2.6.8 Skift Report: The Future of Wellness in Meetings and Events

Skift provides global travel industry intelligence and research. In 2019 it published a new report entitled ‘The Future of Wellness in Meetings and Events’, in conjunction with The Venetian Resort Las Vegas (Skift, 2019).

The report suggests that wellness has been a buzzword in the travel world for years, but that it has taken the hospitality industry a while to realise that wellness is not just about providing access to fitness centres, organic food items, and spa treatments. In a world in which work has become more fast-paced and smartphones are glued to hands, people are looking for ways to feel healthy and happy while remaining productive in their careers. The pursuit of wellness is a part of their everyday lives, and with the rise of such in-home exercise options as Peloton bikes and Mirror gyms, it’s becoming easier than ever to make fitness personal. And once consumers make fitness and wellness part of their routine, they don’t want to give it up when they travel.

Hospitality brands are increasingly realising that they have to provide experiences to help people feel wholesome while on the road. Meeting and event planners are at the forefront of this movement as they acknowledge that productivity requires both a sound mind and a sound body. Planners are requesting more varied and healthful food options, flexible scheduling, and creative alternatives to cocktail receptions.

The report covers:

- Background on the rapid rise of wellness in meetings and events
- Interviews with meeting planners on best practices for integrating wellness into programmes
- Insights on the changing consumer preferences impacting the meetings sector
- Expert commentary on what planners need to know to keep attendees engaged today
- Forecasts for the future of the meetings and events business.

CASE STUDY 2.1

22nd Annual World Congress of the International Federation for the Surgery of Obesity and Metabolic Disorders, held at London's QEII Centre, 29 August – 2 September 2017

IFSO is a federation composed of national associations of bariatric (or obesity) surgeons. Currently there are 64 official member associations in 64 countries and circa 8500 members. The secretariat is in Naples, Italy.

IFSO's vision is to optimise the control of adiposity-based (ie. obesity-based) chronic diseases.

2017 saw the International Federation for the Surgery of Obesity and Metabolic Disorders (IFSO) 22nd World Congress taking place in the UK for the first time, held at London's QEII Centre in partnership with Central Hall Westminster from 29 August to 2 September 2017. IFSO 2016 took place in Rio de Janeiro and IFSO 2018 in Dubai.

London was selected in a bid process because the UK is a centre of excellence for surgery in obesity and metabolic disorders. The British government and NHS have prioritised obesity and metabolic disorders and as a result the UK, and, in particular London, is a knowledge hub for the sector. This is in addition to London being a part of the Golden Triangle of Life Sciences with Cambridge and Oxford. The local network is extensive and distinguished.

QEII and Central Hall Westminster were chosen as not only do they provide the facilities for a multi-stream event and exhibition, but the excellent location in London, directly opposite London icons Westminster Abbey and The Houses of Parliament, ensured international delegates could enjoy the experience only London can bring.

The British Obesity & Metabolic Surgery Society (BOMSS) coordinated the event on behalf of the federation. The successful bid was orchestrated by London & Partners, with PCO partner TFI Group working closely with events teams at QEII and Central Hall to deliver the five-day event.

TFI Group is a full service Professional Conference Organiser established in 1981 with a core expertise in the delivery of self-financing and profit generating conferences for the association market. It has 25 employees with the full range of event and association management skills. Ten of the team members were involved in delivering IFSO 2017.

The partnership between TFI Group and the QEII provided a business and finance model that mitigated the client's risk and resulted in a sustainable and successful congress for all the stakeholders.

IFSO's objectives are to provide a scientific programme showcasing the latest research and best practice in surgery for obesity and metabolic disorders, to enable practitioners in surgery for obesity and metabolic disorders to meet, exchange experiences and knowledge facilitating best practice as well as to provide a platform highlighting the impact on society of the lack of understanding of the advantages of surgery for obesity and metabolic disorders.

IFSO brings together world leaders in metabolic and bariatric surgery to educate, discuss and collaborate, with a scientific programme at the London event including a two-day International Conference on Sleeve Gastrectomy and 10 parallel scientific sessions during the main congress.

The scientific programme highlighted the multidisciplinary nature of obesity and its management with joint symposia taking place including anaesthetic, fertility, plastic surgery, paediatric surgery, psychology, psychiatry and internal medicine colleagues. There was a special emphasis on integrated health and non-surgical, endoluminal and mini invasive treatment strategies. An exciting 'Dragon's Den in the Shark tank' session took place where participants pitched ideas for randomized controlled trials to a panel of experts.

A political session and panel on 'Why is a safe cost-effective therapy for a deadly disease under-utilised?' highlighted the economic impact and barriers of commissioning more bariatric surgery as well as how surgery is a viable option to manage the obesity epidemic. The panel consisted of industry experts, surgeons and MPs.

With 10 postgraduate courses including the 6th International Conference on Sleeve Gastrectomy, multiple symposia, 217 oral abstracts, 60 video presentations, 807 abstracts accepted for posters, 20 Top Posters, and 21 live operating sessions, the scientific programme provided a unique opportunity for all those interested in obesity and metabolic surgery to share their experiences, expertise and knowledge and seek practical solutions in their search to eradicate and manage this epidemic.

The 21 live operating sessions transmitted from 21 different locations in Brazil, US, Lebanon, Mexico, Spain, France, Belgium, Romania, Germany and the UK showcased the excellence of the UK technical production industry. This had never been successfully achieved in previous IFSO congresses.

Figure 2.15 IFSO Congress 2017 Plenary Session, Central Hall, Westminster



For the first time the congress also had a non-medical speaker, with Sir Ranulph Fiennes, the world's greatest living explorer, delivering an inspirational speech at the Presidential Address.

IFSO had several networking events including The Presidents' dinner at One Whitehall Place and The Congress Networking Dinner at the National Maritime Museum with

riverboat transfers from Westminster to Greenwich.

IFSO was a great project with almost 3,000 international delegates from 82 different countries, an excellent complex scientific programme of over 500 invited speakers and abstract presenters, with over 50 exhibitors. The congress exceeded its original target of 1800 global delegates as well as surpassing its

initial sponsorship target by 300%.

One of the only concerns for the IFSO 2017 delegates was the close proximity of the 2017 terrorist attacks in Westminster and in London and the level of terrorist threat at the time.

Caroline Windsor / Eija Hakkinen, TFI Group – www.tfigroup.com

2.3 Exhibitions and Trade Fairs

2.3.1 Definition and Background

ISO 25639-1:2008 (E/F) (ISO, 2018) defines an exhibition, show or fair as an event in which products, services, or information are displayed and disseminated. Exhibitions differ from conferences, conventions or seminars, or other business and consumer events. Exhibitions exclude flea markets and street markets.

Exhibitions include:

- Trade exhibitions: exhibitions that promote trade and commerce and are attended primarily by trade visitors. A trade exhibition can be opened to the public at specific times
- Public exhibitions: exhibitions open primarily to general public visitors. A public exhibition is sometimes also known as a consumer show.

The exhibition sector consists of three main groups:

- organisers of the exhibitions
- the venues where the exhibitions are held
- those businesses contracted by the organisers or exhibitors to supply services for the exhibition.

Within the three key sectors of the events/exhibitions industry listed above, there are a host of supplier

types, ranging from venues and event management companies to audio-visual and caterers, electricians and stand build designers, and registration to event tech suppliers. There are almost 400 member companies represented by the membership of the Association of Event Organisers (AEO), Association of Event Venues (AEV) and the Event Supplier and Services Association (ESSA).

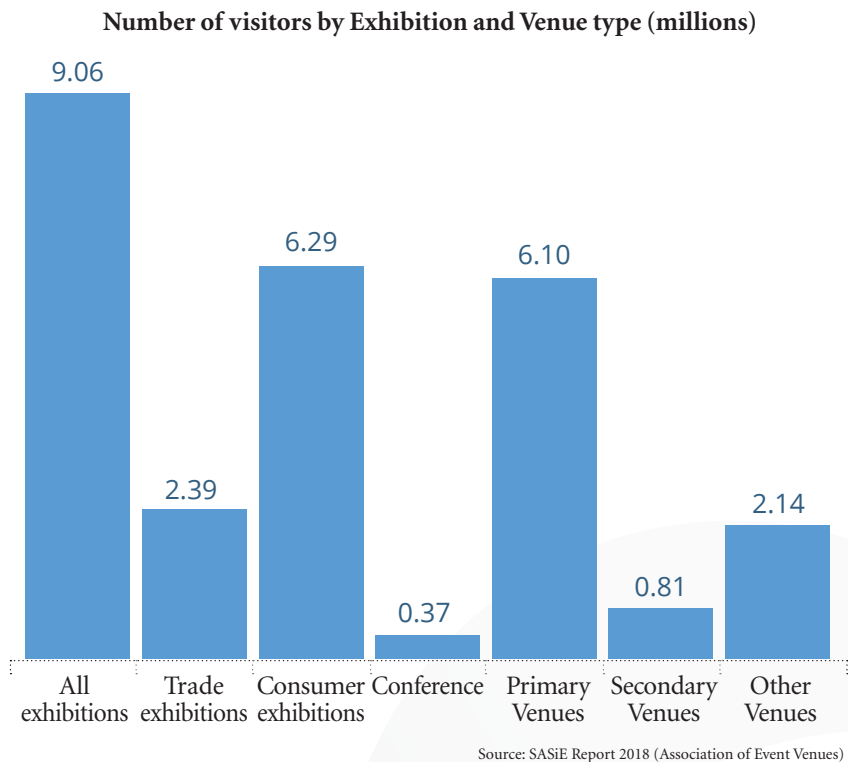
2.3.2 Exhibitions as a Marketing Channel

Despite technology innovations and the widespread use of social media, exhibitions and trade shows remain relevant and powerful as the only marketing channel to offer a flexible, face-to-face buying experience. They are a prime example of experiential marketing activity, with exhibitors able to design stands and product offerings which can appeal to all of a visitor's five senses. Exhibitions harness the latest technology to ensure their continued relevance and deliver outstanding experiences for visitors and exhibitors.

Exhibitions do more than just sell: they increase brand awareness, strengthen existing customer relationships, generate high quality business leads, educate and inform audiences, provide an opportunity to conduct and/or deliver market research, and are often used to launch new products. Exhibitions play a vital role in the marketing mix, offering a wide range of benefits.

Exhibitions provide an opportunity for small and medium-sized enterprises (SMEs) to market their business, product or service in a way other methods cannot beat in terms of reach, relationship building and delivering a relevant audience. Exhibitions enable many SMEs to develop their offering and establish

Figure 2.16 Number of visitors to UK exhibitions in 2018 by exhibition and venue type



themselves in the marketplace by gaining valuable feedback from, and exposure to, a wider audience, for example, international visitor attendance. Such visitors often provide them with their first openings to export markets.

In terms of seasonality, the peak seasons for trade exhibitions are February to June and September to November but, when public exhibitions are also taken into account, exhibitions essentially become a year-round activity.

2.3.3 The Economic Impact of Exhibitions

A 2019 report by AEO/AEV/ESSA and Oxford Economics into the 'Economic Impact of Exhibitions in the United Kingdom, 2019' (AEV, AEO & ESSA, 2019), alongside 'SASiE – the Size and Scale Index for Events' (AEV, 2019), and the '2018-19 AEO Global Event Study' (AEO, 2019) found that:

Direct impacts of exhibitions in the UK in 2018

- UK exhibitions attracted over 9.1 million visitors in 2018 to almost 1,100 events across a range of sectors for both trade and consumer audiences (see Figure 2.16). The SASiE research focuses on the larger UK exhibitions of 500m² plus
- Over 178,000 exhibiting companies participated in events
- Exhibitions generated £5.0 billion of direct spending by visitors, exhibitors and additional exhibitor-related expenditure
- Exhibitions supported more than 55,000 direct jobs in the UK and generated £2.6 billion of direct GDP (gross domestic product)
- Exhibitions generated approximately £28,000 in direct spending per exhibitor

Total Impacts of Exhibitions in the UK in 2018

- Total economic impact of £11 billion of output
- 114,000 jobs sustained
- £5.4 billion of GDP
- **So, overall, the UK exhibitions sector generated £11 billion in spending and contributed £5.4 billion in value-added to the UK economy in 2018. This activity supported 114,000 jobs in the UK.**

Impacts of UK Organisers Internationally in 2018-9

- Just 23 UK-based AEO members organised over 1000 events outside of the UK
- These events created £2.17 billion of turnover for these UK businesses
- This is equivalent to the eighth largest Service Exporter, according to 2016 ONS (Office for National Statistics) Service Export Statistics (ONS, 2016).

Global Impacts of Exhibitions in 2018

UFI, the global association of the exhibitions industry, published a new report entitled 'The Global Economic Impact of Exhibitions' (UFI, 2019a). Among its key findings are:

- Exhibitions had a total output of US\$325 billion (£251 billion) in annual business sales in 2018, and contributed US\$198 billion (£153 billion) to global GDP
- The total impact of US\$198 billion in global GDP includes the direct spending and jobs that are specifically involved in planning and producing exhibitions, and for participants and exhibitors to travel to exhibitions, as well as other exhibition-related spending

- Exhibitions saw 303 million direct visitors across more than 180 countries and 32,000 shows. In addition, the industry supported 3.1 million jobs worldwide
- Europe was the largest market in terms of visitors, welcoming 112 million in 2018. This represents 37% of global exhibition visitors. North America ranked second, with 91 million visitors, followed by Asia-Pacific with nearly 82 million visitors.

2.3.4 Characteristics of Exhibitions

- Most exhibitions tend to be annual and are held at the same venue year on year. There are also a number of biennial events, while some of the large international shows are just held every four years
- The time of year an exhibition is held is critical to its success. To ensure they obtain their desired time slot, organisers usually book the venue at least one year in advance
- The timing and venue chosen for exhibitions are, to a large extent, dictated by the market conditions of the trade sector which they represent
- Factors that may influence the choice of venue for an exhibition include:
 - Rental and service costs
 - Capacity of venue
 - Location of venue
 - Contractual relationship with venue
 - Accessibility of venue
 - Suitability of venue for the sector/target audience

2.3.5 International Activity and Competitiveness

Research by the Association of Event Organisers, its 'Global Event Study' covering the period April 2018 –

March 2019, found that UK exhibition organisers are the most active around the world. In that period, they were responsible for 1,002 events outside the UK (AEO, 2019).

On average, UK-organised overseas events attracted 200 exhibitors, equating to extrapolated exhibitor numbers of over 211,000, compared to c.93,000 exhibitor numbers for German organisers abroad.

Overseas events represent a value of c.£2.17 billion to UK organisers. On average, 58% of UK organisers' turnover is attributed to events organised overseas. Eighty-four per cent of those UK organisers operating overseas expected their overseas exhibition turnover to increase over the next twelve months.

The results of UFI's 23rd Global Barometer Survey (UFI, 2019b) confirm that the international exhibition industry continues to be stable, although growth is weaker than in previous years. They cite the most important business issues as:

- State of the economy in the home market (24 per cent in the current survey, up from 1 per cent in the previous survey)
- Competition within the industry (constant at 19 per cent)
- Global economic developments (19 per cent, up from 1 per cent)

2.3.6 UK Market Growth

Annual research into the global exhibition market by AMR International, published as 'Globex' (AMR, 2019), contains a chapter on the UK exhibitions sector which predicts that the UK market is set to grow at c.3% CAGR (compound annual growth rate) until 2023. The Globex report states that:

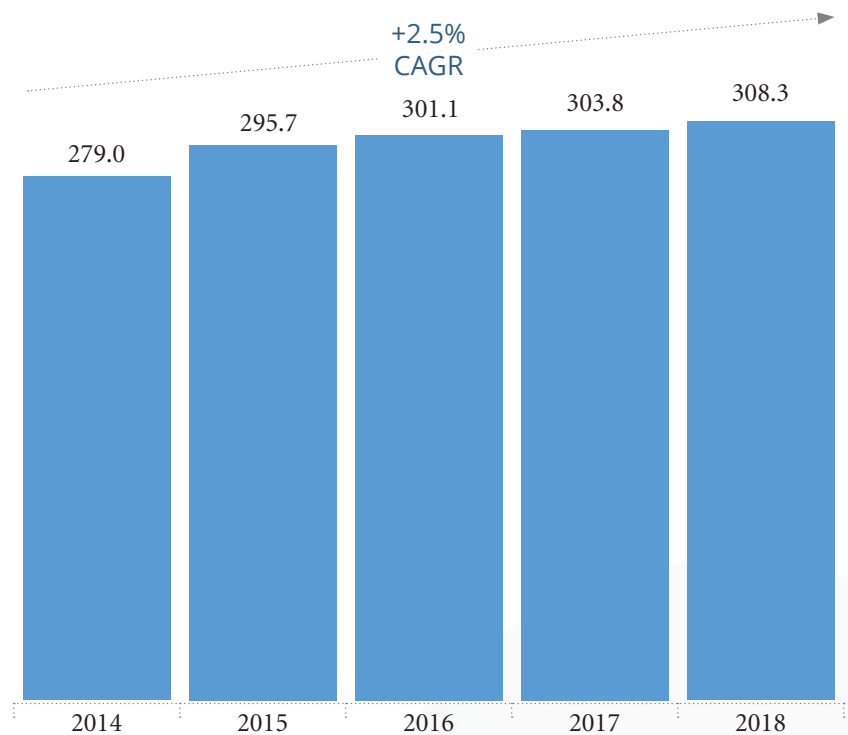
- The signs are that, in the short term, there will be continued slowdown in the UK tradeshow

sector, mirroring concerns in the wider economy

- The market will continue to see fewer new event launches over the next couple of years, while the effects of Brexit play out. Forecast growth will be primarily price-driven
- Assuming no further shocks, and post-Brexit clarity, the UK tradeshow market should return to more solid growth in 2019-2020
- Large UK organisers will continue their focus on international opportunities and are even less likely to commit to major investment into UK events
- The market will continue to have a dynamic second tier of events and event organisers
- The overall opportunity in the UK market will continue to be more focused, content-led events, which attract high-level delegates

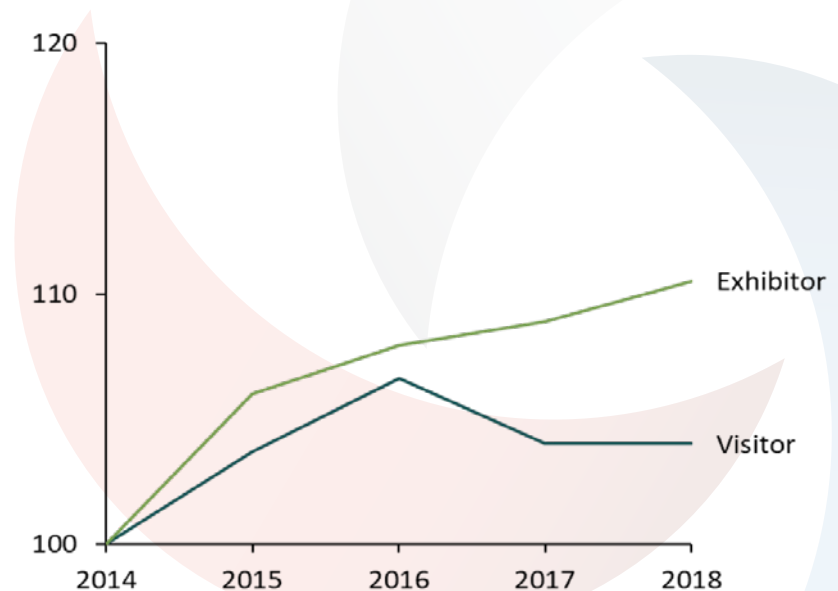
The report also says that there were c.308,000 exhibitors across all UK shows in 2018, up 1.5% from 2017. It adds, however, that the NSM (net square metres) per exhibitor declined by c.1% in 2018, suggesting that exhibitors were remaining cautious about how they spend their marketing budget and were continuing to look for other ways to add value on a similar-sized stand from the previous year. Average stand size has also reduced significantly, and exhibitors are now opting for modular solutions that are more cost-effective compared with space-only options, indicative of an increased focus on ROI. Figure 2.17 shows exhibitor growth over the period 2014-2018, while Figure 2.18 compares exhibitor with visitor growth over the same period.

Figure 2.17 Exhibitor growth (thousands), 2014-2018



Source: Globex 2019, AMR analysis

Figure 2.18 Exhibitor vs. Visitor growth (index, 2014 = 100)



Source: Globex 2019, AMR International

Sector Split

According to Globex 2019, growth sectors in 2018 in the UK market were: education; business services; interiors, furniture & lighting; and gifts, toys & other consumer.

Weaker sectors in 2018 were automotive and leisure & sports.

Table 2.2 lists the top 20 UK exhibitions in 2018 by net space.

Table 2.2 Top 20 Exhibitions by Net Space in 2018

Exhibition	Organiser	Venue	Sector	Frequency	Space (Net Square Metres)	Change on previous edition	# of exhibitors	# of visitors
Spring Fair International	ITE (former Ascential)	NEC	Gifts, toys, other consumer	Annual	88,556	12.1%	2500	60,000
Southampton International Boat Show	National Boat Shows	Mayflower Park	Leisure & sports	Annual	75,000	0.0%	579	106,000
The Motorhome & Caravan Show	NCC Events	NEC	Leisure & sports	Annual	56,401	5.8%	400	96,000
Hillhead	QMJ / Capital BE	Buxton	Building & construction	Biennial	56,000	0.0%	546	19,753
World Travel Market	Reed Exhibitions	ExCeL	Leisure & sports	Annual	47,420	3.0%	790	36,027
ICE Totally Gaming	Clarion	ExCeL	Leisure & sports	Annual	43,500	-0.6%	589	33,536
The Caravan, Camping & Motorhome Show	NCC	NEC	Leisure & sports	Annual	42,793	-4.8%	400+	90,107
January Furniture Show	Clarion	NEC	Interiors, furniture & lighting	Annual	42,793	1.9%	500	21,000
Classic Car Show	Clarion	ExCeL	Leisure & sports	Annual	40,936	0.0%	571	71,000
London Boat Show	National Boat Shows	ExCeL	Leisure & sports	Annual	39,160	-12.0%	347	52,000
Autumn Fair International	ITE (former Ascential)	NEC	Gift, toys, other consumer	Annual	37,000	-1.0%	1,193	24,000
Commercial Vehicle Show	Commercial Vehicle Show LLP	NEC	Automotive	Annual	30,038	-12.5%	450	20,000
LAMMA	Briefing Media	East of England Showground	Agriculture	Annual	28,190	4.4%	900	40,000
HRC – International Hotel & Restaurant Exhibition	Fresh Montgomery	ExCeL	Leisure & sports	Biennial	28,000	0.0%	c.650	c.20,000
MACH	The Manufacturing Technologies Association	NEC	Machinery, manufacturing & processing	Biennial	26,709	6.4%	539	26,169
Euro Bus Expo	Diversified Business Communications	NEC	Transport & logistics	Biennial	25,000	0.0%	265	8,950
BETT	ITE (former Ascential)	ExCeL	Education	Annual	20,500	11.7%	850	34,700
Practical Classics	Clarion	NEC	Leisure & sports	Annual	19,878	12.0%	n/a	28,151
EGX	Reed Exhibitions	NEC	Leisure & sports	Annual	19,323	n/a	n/a	80,000
GLEE	ITE (former Ascential)	NEC	Gardening	Annual	19,323	3.7%	550	7,000

Source: ABC, AMR Research, analysis and estimates – Globex 2019

2.3.7 Trends in the Exhibitions Sector (Interesting Graphics in this section)

The Globex 2019 report from AMR International (detailed above) also describes a number of trends impacting the UK exhibitions sector. These include:

- The development of innovative solutions to enhance visitor and exhibitor experience at events continues to be widespread but not necessarily successful
- Technology is changing the way that organisers interact with customers both at events and throughout the year. Key aims are to develop software and services that drive registration, interaction and measurement, to provide optimised experiences for visitors, exhibitors and organisers
- Intelligently collected data is seen as a holy grail to grow visitor numbers, provide greater ROI for exhibitors and generally understand and improve customer experiences. However, despite the prevalence of new technology, many show organisers continue to fail to grasp its full potential and are still doing things in outdated ways, albeit in a more electronic fashion
- Also, the ad hoc nature in which technology is being developed, often by technology start-ups, means that there is a plethora of different tools available which are being used by different organisers and are not necessarily well connected or effective. In the UK, there is still scope for larger software companies to enter the market and build more widely integrated tools
- Organisers also continue to focus on more traditional ways of improving exhibitor and visitor satisfaction, as both sides demand higher ROI
 - ‘customer experience’ continues to be a significant driver of innovation in the UK as visitors (and exhibitors) demand greater experiential value
 - Direct investment into events, through additional features, better hall layout and improved visitor traffic flow also continues to increase
 - Organisers recognise the need to provide events and features with the tradeshows which will ensure that ‘time-poor’ visitors both come to the tradeshows and stay longer. Initiatives include award ceremonies, booking inspirational speakers from different sectors, as well as promoting free food for VIPs and networking events like ‘Champagne hours’. The key is for visitors to enjoy their experience, in addition to satisfying business needs
- The use of social media and apps is continually developing
 - There has been a certain amount of trial and error in finding out which tools work for each type of event, and then replicating successes across other sectors
 - The use of apps and social media for marketing before, during and after events is increasing
 - Digital initiatives require an element of ‘human factor’ to ensure their success. Organisers cannot simply put up a digital platform and expect users to engage with it. The launch needs to be supported with telephone marketing to introduce the platform and explain its significance / benefits
- In an ever-moving world, new and disruptive technologies such as Blockchain will continue to challenge events, organisers and venues
- Content at the centre of events is becoming increasingly important
 - As the role of exhibitions has shifted from trade to education, organisers have addressed this by improving the quality of conferences / talks at events
 - Having world-class speakers on the exhibition floor in order to attract key visitors is seen as increasingly essential
 - More and more organisers are following a model of having free, very strong content at the heart of their exhibitions.

In an article for Exhibition World magazine (Hattendorf, 2019) entitled ‘UFI’s 5 trends to watch’, Kai Hattendorf, UFI managing director, describes core themes expected to impact the global exhibitions industry from 2019:

1. **Shifting trade patterns and a jittery global economy:** amidst a climate of political tension, protectionism and false news globally, economic growth is slowing down. US/China tariffs alone are calculated to reduce global economic growth by 0.4% in the long term. Even without this additional burden, growth has become difficult to sustain, especially in the mature exhibition markets: CEIR data shows that, in the US alone, our industry has seen below par growth compared to the US economy as a whole in seven out of the last eight quarters.

It comes as no surprise that a growing number of US organisers are looking into doing business outside of their home country. In parallel, 2018 saw the first ever instance of a Chinese organiser taking a majority share in a trade show outside of China. We will see players from the two largest domestic markets in the world looking into options abroad. All of this offers new opportunities to partner between organisers from different markets, and to capitalise on joint interests.

2. **Digital is everywhere - but it is not everything:** ten years into the mass adoption of social media and the rise of smartphones, it is time to end the discussion about the role of digitalisation in our industry. Today, digital is simply everywhere – on the show floor, in the show manager's office, in the customer's exhibition experience. As digital has become as common as electricity, it has become a commodity (just as show security, by the way). The adoption of the European Union's General Data Protection Regulations (GDPR) is leading us to a 'new normal' in the way that we as an industry are dealing with customer data and are building up the in-house resources to achieve that. Data handling and data security will be big topics in the future. As show brands around the world increasingly communicate digitally with their customers and communities all year round, data operations will be as relevant as show floor operations.
3. **Getting the basics right goes a long way on creating experiences:** for many years, the 'show floor' was understood to be about exhibitors showcasing their

products and services. To the millennial and post-millennial generation, however, it is just as much about the 'show' that a show organiser puts on around the show floor itself. 'Festivalisation' is a buzzword, and will rightly disappear again. But we are well advised to listen closely to our customers and their call for very personal and individual experiences when they attend an exhibition. As the overlap between trade shows and congresses/conferences continues to grow, there are opportunities to deliver that – and there is a risk for those who don't pay attention to these shifting demands. We have a solid understanding of visitors' changing expectations. Many are reporting 'trade show fatigue' (less so in developing markets than in developed markets). Visitors say that their interest in other channels such as online marketplaces and conferences will likely rise significantly relative to trade shows. Organisers and venues alike are well advised to never forget to deliver excellence in terms of the basics as visitor pain points are surprisingly simple. The top five are: seating, catering, queuing, parking and quality of the exhibitors. Organisers can go a long way to pleasing visitors by getting these five factors right.

4. **Consolidation and collaboration:** we have seen an intense level of M&A (mergers and acquisitions) activity in the past two years – shaking up our industry in the process. In addition, more and better venue space around the world is being built. Billions of dollars are flowing into our industry. And all the signs right now are indicating that, despite the less positive economic outlook, our industry remains attractive

for investors looking for solid, mid-term returns of their investments. The mix of players in the industry remains varied: listed companies, publicly owned organiser/venue operator enterprises, family businesses, entrepreneurs and government bodies. The growing number of 'out of the industry investors' is driving prices to new heights, but it remains to be seen whether all these bets on growth will be successful. Our industry's reputation, however, is certainly benefitting from this trend. It is helping our stakeholders to better understand the economic impact that every show, every venue creates every day.

5. **Diversity in leadership:** if you look at the teams who deliver and grow exhibitions around the world, and who operate venues, you find a broad diversity of skills, nationalities, and qualifications. Slowly but surely, our industry is reflecting this as well in its leadership. We've seen a steady flow of senior appointments enriching the diversity of boardrooms over the past two years, adding new voices to the respective tables – most notably women on the one hand, but also hires from outside of the industry. Both of these trends will accelerate, and continue, in 2019 and beyond, to the benefit of our industry. To reduce this discussion to a gender issue alone, however, leaves out a major part – cultures and skills are just as important a part of the mix.

Exhibition News magazine asked a number of event industry figures across the supplier, venue, organiser and tech spectrums how the experience of exhibitors might change in the years to come – their answers are summarised in an

article entitled ‘What will define the exhibitor experience of the future?’ (Exhibition News, 2019). Perhaps unsurprisingly, the consensus was largely that the exhibitor experience will become more personalised, making greater use of tech for improved insights, ROI analysis and more effective interactions with visitors. Specific comments included the following:

Shane Hannam, portfolio director, IBTM: In the future we expect to see artificial intelligence (AI) enhance many aspects of the exhibitor experience. From predictive analytics showing what buyers need before they ask for it, to facial recognition software offering additional buyer insights to exhibitors ahead of doing business, to chatbots taking over customer service, AI is set to completely transform the exhibitor/ attendee relationship and will allow exhibitors to create more tailored and immersive ways to engage customers.

Peter Gillett, CEO, Zuant: the exhibitor experience of the future will be defined by a full digital experience from receipt of ticket within an app that can be scanned by exhibitors to take you through into a new gateway of exciting content and fast follow-up.

Jamie Vaughan, head of European sales, Cvent: in a word: personalisation. By embracing technology, exhibitors will maximise their impact onsite with a system that will tell them who to meet and what they’re interested in, driving more meaningful and profitable conversations.

Christopher Cashman, sales & events manager, LSO St Luke’s: the days of passive attendance are numbered, so interactivity will certainly define exhibitor experiences of the future. If visitors can get the same experience from the comfort of their computer screen they will,

so exhibitors need to focus on the personal touches to truly engage and encourage visitors. This will mean more collaborative seminars, hands-on product testing and closer interaction with key industry names to provide an experience they couldn’t get anywhere else.

Brecht Fourneau, senior director, EMEA Marketing, Aventri: the exhibitor experience of the future will be enriched by artificial intelligence, data analytics and facial recognition technology. These three trends are now in motion and poised to take off in a big way over the next few years. AI will transform the experience. Using wearable technology and mobile event apps, more exhibitors will get notifications when good prospects are approaching their booth. Notifications feature a headshot and list of shared interests to spark meaningful conversations. Personalisation will take a giant leap forward. Exhibitor booths will be able to greet attendees by name thanks to facial recognition technology. As facial recognition and AI continue to gain traction, more exhibitors will capture leads without having to ask for names and scan badges. They’ll deliver a more memorable experience and give undivided focus to building quality relationships. Proving a return on investment will get easy. As more organisers adopt data analytics platforms, they’ll provide robust ROI reports showing booth traffic, leads captured, year-on-year gains, visitor dwell time, repeat visits, etc. More exhibitors will prove ROI and gain valuable buyer insights their companies can use to build brand awareness and drive revenue.

2.3.8 Festivalisation

Festivalisation has become a growing trend and buzzword around the exhibitions and business events sector in recent years. It derives from event attendees now demanding an experience and not just an event – an

experience that engages, entertains and connects emotionally. It suggests that trade show attendees and visitors want to have fun and they want to experience an event that is not just informative or educational but is sociable, interactive and feels personal.

Contributing to an ‘Exhibition News’ article entitled ‘Rethinking the event blueprint’ (Holt, 2019), Sophie Holt, global strategy director, Explori and editor of Explori’s 2018 Global Visitor Insights report, provides a research-based perspective on festivalisation. She writes:

‘When we look at the views of over 13,000 trade show visitors around the world who responded to our recent Global Visitor Insights study, they give us a very clear message: it doesn’t matter whether events are entertaining as long as they can meet their business objectives. The majority of our current visitors (76%) think trade shows shouldn’t become more like festivals.

But this doesn’t quite tell the full story. Unsurprisingly, younger visitors (those aged 35 and under) are much warmer to the idea of festivalisation. This trend holds true even when we compare the views of just CEOs and business owners; twice as many ‘millennial’ CEOs thought trade shows should be more like festivals, than CEOs in older age groups. Younger CEOs were also twice as likely to say they would spend longer at a show if it was more entertaining.

This suggests that, whilst organisers of shows in the UK should be firmly emphasising the business benefits of attending, it is an important trend to watch for the future. Millennials will increasingly hold the most senior roles in the markets our shows serve and they don’t appear to be losing their generational preferences as they get more senior in their careers. They will expect organisers to deliver both business benefits and an entertaining experience.

The good news is that the aspects of a 'festival-style' event that appealed most to our respondents may not require a large investment from organisers. Talks and presentations delivered in different styles was a popular trend across all age groups, especially younger generations who define themselves as content creators. New technology such as VR was also popular, with up to 72% of respondents in some regions telling us this was something they would definitely like to use.

The appetite for more entertaining, festival-style shows is stronger when we look outside the UK at markets where the exhibitions industry is less developed, for example 43% of respondents from Asia and the Middle East think they would spend longer at a more enjoyable event; almost double the response from markets such as Europe and North America.'

2.3.9 Exhibition Standards and the eGuide

The eGuide brings together guidance for achieving common standards of health, safety and operational planning, management and on-site conduct for events at all participating member venues. The scope and development of the eGuide follows extensive consultation with operations professionals within the exhibition and event industry in order to ensure an overall approach that remains broadly acceptable to this community.

Now recognised as the industry's best practice document, the eGuide is continually reviewed by working industry professionals who represent the best advice currently available, and who themselves have to work within the guidelines in their own professional capacities. Senior representatives from ACC Liverpool, P&J Live, Alexandra Palace, Business Design Centre, east of England arena and events centre, Event City, ExCeL London, Farnborough International Exhibition & Conference Centre, Harrogate Convention Centre,

Manchester Central, nec group, Olympia London, QEII Centre, Ricoh Arena, SEC Glasgow, the International Centre Telford, the O2 and Yorkshire Event Centre currently sit on the **eGuide strategic committee**, meeting twice a year to steer the guidance thematically and address any complex or contentious topics. A number of additional venues also participate in this process and are gradually moving towards the formal adoption of the document themselves. Additionally, the **eGuide technical committee** works all year round to maintain the detail of the document, ensure consistency and simplify rules and regulations to the greatest possible extent.

By coming together, and proactively seeking to identify where working conditions and regulations are common (or, due to unique site circumstance, different), contributing venues are, in essence, providing answers to questions that organisers and supplier companies may have, resulting in more efficient on-site activity, a smoother operation for the event organiser and, therefore, a more polished product for the client, exhibitor and visitor.

In competent hands these guidelines should be an invaluable tool, simplifying health and safety planning and management and other operational issues on the floor. Go to www.aev.org.uk/eguide for more information.

2.3.10 FaceTime

FaceTime is an AEO-funded marketing initiative that was set up in 2010 to help customers harness the power of live events. FaceTime provides expertise and guidance for marketers and businesses, explaining why live events work and how to get the very best out of face-to-face marketing to drive sales, enhance customer relationships and deliver customer insight.

FaceTime champions best practice in the live events industry, builds insight into the medium through market-leading research and promotes its unique qualities with the goal of growing the sector. A range of bespoke collateral, including guides, training webinars and masterclasses, videos, research and case studies (see Unipart Rail case study below as an example) explain how to make the very best return on investment from a live event – these can be found on FaceTime's website www.facetime.org.uk/

2.3.11 Priorities for UK Exhibition Organisers

Exhibition organising is a creative enterprise activity which, to survive, has to stay at the leading edge of marketing. UK organisers lead the world and, to maintain their top position, the following are among their key priorities:

- To enhance their exhibition product, an increasing number of organisers have developed enhanced content surrounding exhibitions, including conferences and specialist seminars alongside their events
- New technology is used to enhance (not replace) the exhibition, as there is no substitute for face-to-face contact, customer interaction and the ability for the customer physically to feel, see, taste, smell, test and try the product
- This technology is being used to help relevant visitors and exhibitors connect. Activities include hosted buyer programmes, 1-2-1 meeting scheduling, matching visitor and exhibitor personas suggesting meetings and connections
- Data analysis and insight features highly both in helping to form events, but also to identify buying and selling groups, and then to target them

CASE STUDY 2.2 Unipart Rail Increases On-stand Enquiries by 45 Per Cent

Unipart Rail is part of the global business that brings together manufacturing, logistics and consultancy in a set of products and services that create imaginative solutions for its customers. Operating in the global rail market, Unipart Rail works with blue chip companies to address challenges and work collaboratively to reduce risk, optimise costs and improve performance.

Historically, the business has found that exhibitions are an excellent way of building and maintaining important, senior-level working relationships. Over the past couple of years, the company has exhibited at international events such as Africa Rail, APTA, Ausrail, Infrarail, Innotrans, Middle East Rail and Railtex.

The Challenge

Despite operating in a relatively slow-moving industry, like many businesses Unipart Rail started to recognise that its customer base was changing. Long-established contacts were moving on and a new generation was coming to the events the business was looking at. New relationships needed to be established with an audience that was used to a faster pace of change and was confident in using technology.

For Unipart Rail, this meant the team needed to look at how they exhibited and, more importantly, how they marketed and whether their selling technique was engaging enough for this new audience. The big challenge was how to drive change internally to appeal to a younger customer base.

The Solution

In 2016, Unipart Rail was invited to attend the National Exhibitor Masterclass at the NEC by their supplier, and sponsor of the event, GES. The free ticket allowed them to access a full day of training from top class speakers, network with other exhibitors so that they could share best practice, access experts on stand design, logistics, promotional merchandise and more, plus collateral which they could take back to their business to help them look at improvements in how they exhibit.

Since attending the Masterclass, Unipart Rail has put into practice everything the team learnt in order to attract new contacts to the main exhibitions at which they exhibit. New marketing techniques learnt at Warren Knight's social media session helped them with the ways in which they could appeal to the ever-growing younger audience. The team took the decision to be bold in their marketing by doing something they had never considered before. By combining their new understanding of augmented reality (AR) / virtual reality (VR) with what they had learnt from the social media session, they created a campaign to drive customers and prospects to their stand ahead of the show. This helped them evolve into the digital world that they aspired to inhabit.

This led to the team running a virtual experience on their stand at Innotrans. Via a virtual guided tour, visitors

were able to experience services offered by the business that previously would have been through brochures and graphics.

Another speaker that Unipart Rail learned a lot from at the Exhibitor Masterclass was Rob Brown who ran a session on networking. Again, this was a session that would provide obvious benefit whilst on stand at an exhibition but also in any general business setting. The team members who attended the Masterclass thought the wider team would benefit from the learnings, particularly if they were going to try something new and more interactive at Innotrans – something that might be outside the comfort zone of the industry experts who had been exhibiting for years.

Rob's presentation 'The 7 Secrets to Successful Exhibition Conversations' was universally well received internally and many of the different techniques were put into practice over the course of the exhibition.

The team briefing pack was also changed as a result of attending the Masterclass which, amongst other things, included hints and tips on on-stand behaviour and how to ask three questions before the visitor asks one.

The Results

The Exhibitor Masterclass allowed Unipart Rail to effect real change within their business to appeal to a wider audience. The first step was questioning what they were doing and whether it was the best they could do. The Masterclass helped the team take that first step and they have not looked back.

Inspired by high calibre speakers such as Andrew Hickinbotham, Rob Brown, Ruth Badger, Steve Kernish, Warren Knight and more, the team has ensured that, when they are side-by-side with their competitors at trade shows, they come out on top.

The proof is in the pudding, with average on-stand generated enquiries improving by 45 per cent.

The use of AR/VR also brought what many consider as a very traditional industry up to date, opening up new experiences for event attendees. It is something that has impacted positively Unipart Rail and the way they exhibit, increasing on-stand engagement and positive responses from visitors.

Since attending their first Exhibitor Masterclass organised by FaceTime, the Unipart Rail marketing team has continued to attend each year and has even invited some colleagues along from other areas of the business.

"The Exhibitor Masterclass is the best learning event I've been to in the whole time I've been working in a marketing role. It doesn't just help you exhibit better, it helps you market and sell better." Nicola Holt, Marketing Manager, Unipart Rail.



using cutting-edge marketing techniques

- Organisers will continue to succeed in direct proportion to their ability to identify niche markets for new exhibitions, which are targeted directly for a specific market
- The exhibition sector is taking important steps forward to meet the demands for sustainability. Action is being taken to improve performance in waste management and environmental issues, adopting new techniques to improve recycling and reduce overall waste
- Successful event exhibition formats are being cloned and rolled out to regional and international markets
- Exhibitions provide the perfect framework to enhance the UK's reputation in key markets and key industries, allowing people to drive messaging straight into the heart of the communities they seek to influence.

2.4 Incentive Travel and Performance Improvement

2.4.1 Definition and Background

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. This tool offers individuals or teams the chance to qualify for an exceptional travel experience, subject to their attaining pre-set goals.

Former industry journalist, Max Cuff, defined incentive travel in the following terms (BVEP, 2014):

'Incentive travel is that discipline of sales and marketing and management that uses promise, fulfilment and memory of an exceptional travel-related experience to motivate participating individuals to attain exceptional levels of achievement in their places of work or education.'

While companies have routinely offered a range of employee rewards, including gift cards, merchandise and cash bonuses, travel has been found to be the most effective motivator. It is also perceived as the most valuable, with rewards ranging in value from £500 to £5,000 per head. Travel rewards are generally used by those industries producing a product or service that carries a high profit margin – such as cars, computers, pharmaceutical products and financial services. Companies

in these sectors invest accrued profit from sales to fund incentive travel programmes which will, in turn, boost sales.

Travel incentives and motivational events comprise a business tool proved to change behaviour, improve profit, cash flow, employee and customer engagement and various other business objectives. When properly designed and delivered, they create a measurable and verifiable return on investment. The SITE Foundation says (SITE Foundation, 2013) that:

'Incentive travel programmes have been proven to increase sales, boost productivity, retain customers, hold on to top talent, increase company loyalty, promote teamwork and decrease (staff) turnover, among other results. Research into participants' views of incentive travel programmes shows that they are highly effective in impacting staff performance. Similar research with sponsors of such programmes shows that they have positive bottom line impact and achieve other goals for the corporation.'

In an article entitled *'IT' no longer a dirty word* (Scaillet, 2019), Didier Scaillet, CEO of the Society for Incentive Travel Excellence (SITE),



Company Profile – IMEX Group

The history of the Brighton-based IMEX Group (now 65 staff) is similar to many small business success stories across the UK. To this day the company combines inspiration with unrivalled passion and dogged determination, and it all started with a random chat in a hotel lobby in the 80s.

That chance conversation made Chairman Ray Bloom realise the important role of exhibitions in bringing businesses and buyers together. Soon he and his new business partner were launching their first exhibition into the burgeoning incentive market. It was 1984. Bloom got the bug and has been running exhibitions almost continuously ever since.

Quick success in the UK led them to venture into Europe where they launched a new show, EIBTM, in Geneva. Last minute doubts surfaced about whether high value buyers would travel from the UK to meet exhibitors in Switzerland. Invention became the mother of necessity and a brand new business model was born: the hosted buyer programme. This model has since become standard practice for exhibition owners the world over.

Fast forward to 2019 and the IMEX Group now owns and runs the two market-leading trade shows in the global meetings and events sector: IMEX in Frankfurt, launched in 2002; IMEX America, in Las Vegas, which started in 2011.

Each show brings together around 3,500 exhibiting companies from about 160 countries with close to

4,000 hosted buyers from more than 70 countries and almost 4,000 visitors including over 1,000 visitor buyers. Nearly 70,000 pre-scheduled appointments are made at each using IMEX's own online appointment system.

Success has been down to a partnership mentality and, counter-intuitively, a dedication to service and customer support over profit. Being willing to spend many weeks each year travelling to see partners the world over, attending their events, 'pressing the flesh' and meeting eye to eye has been key. This spirit of collaboration means that the IMEX brand is seen as trustworthy, loyal and committed to the health and growth of the entire global industry, not just itself! For example, over the years many exhibitors have experienced difficulties, be it a natural disaster or a withdrawal of Government support. IMEX has never flinched at stepping in to ensure they can maintain presence and profile at the show until business rebounds.

Also, being a private business IMEX is more risk-friendly and agile than most. Directors can make independent decisions, and fast. Not afraid of experimentation or bold leadership, IMEX has invested heavily and consistently in the industry's advancement by developing programmes and special events for Future Leaders, university faculty, political advocacy, associations, corporate planners, women in events and sustainability. In the past 35 years Bloom has won virtually every industry recognition going and now, with his daughter Carina Bauer at the helm, that legacy continues.

IMEX is truly a British success story. From a small base in its much-loved Brighton home, it now dominates a global business sector and has set new standards for the B2B trade show experience, especially in the US where it refused to follow traditional 'pipe and drape' set-up, introducing US suppliers to new and visually stunning methods of stand construction.

With planning permission obtained recently, the future is bright with the IMEX Group set to build its own headquarters in the city, securing more jobs and ensuring that its economic impact remains locked in.

www.imexexhibitions.com

describes the reduction in incentive travel during the global recession between 2009 and 2014 and the ways in which big users of incentive travel avoided all mention of it as if it was a dirty word. But, he adds:

'The clouds gradually cleared and those same companies realised how disengaged they'd become from their people. Gradually incentive travel was back on the radar and there was a deeper appreciation of its effectiveness. The companies which (had) cancelled their programmes due to recession, or perception, or both, saw clearly and unambivalently the devastating impact that that had on their bottom lines. Once normal service was resumed from 2014 onwards the clear connection between incentive travel programmes and corporate revenues was proven and companies re-committed.'

He then explains:

'Companies are realising now that incentive travel programmes have an effectiveness BEYOND sales. They're seeing the upswing in annual revenues that can be attributed to a well-executed incentive travel programme is only the tip of the iceberg in terms of real and lasting impact. The Incentive Travel Industry Index (ITII) conducted jointly by SITE and partners reveals a significant jump in the secondary, 'soft' objectives for having an incentive travel programme in the first place.

While financial outcomes are still dominant ('increase in sales and/or profitability for the overall company'), soft outcomes such as 'Better relationships between employees and management' are rising considerably. Overall, objectives supporting positive workplace culture are becoming increasingly important with incentive travel seen as an effective way to deliver upon them. We've uncovered a deeper, richer and more enduring effectiveness to incentive travel that naturally builds positive workplace culture, probably the biggest challenge

that will face corporations over the next ten years.'

2.4.2 Incentive Travel Industry Index 2018

The 'Incentive Travel Industry Index 2018', published by SITE, the Incentive Research Foundation, and Financial and Insurance Conference Professionals (SITE, 2019), was the first joint study of the global incentive travel industry. It found that the key sectors using incentive travel programmes were, in order of importance:

- i. Finance and insurance
- ii. Science and technology
- iii. Professional services
- iv. Pharmaceutical and healthcare
- v. Travel and tourism
- vi. Direct selling
- vii. Automotive

2.4.3 Maritz Travel White Paper

In a white paper entitled 'Using Incentive Travel To Hit Your Sales Goals', Maritz Travel states that 'almost no company is completely satisfied with its sales performance (Maritz, 2019). This holds true across industries, geographies and markets.' But it suggests that while 'financial motivators definitely help drive performance, they aren't great motivators on their own. Research (from Maritz Motivation Solutions and the Incentive Research Foundation) shows that adding in non-cash incentives (like travel) can help drive sales:

- 77 per cent of channel reps are more likely to sell a manufacturer's product if offered an incentive
- 84 per cent of companies use non-cash incentives
- 94 per cent of sales reps prefer cash + non-cash incentives over cash alone'

The Maritz Travel white paper claims that non-cash rewards tend to be more effective and more motivating than cash rewards, and points to several main factors which determine why this is the case:

- **Social reinforcement:** when other people know about your success, you get a strong feeling of social reinforcement. However, it's often not considered acceptable to discuss cash rewards. That makes non-cash rewards a stronger motivator when it comes to social reinforcement
- **Memorability:** when you receive a non-cash reward, you get to enjoy it after the fact. And, with something like an incentive trip, you're building lasting memories that persist as a reminder of the reward long after the trip is over
- **Separability:** Often, people place cash rewards in the same 'mental account' as salary. This means they can come to expect that reward (like they expect their salary), which causes issues if the reward is removed. However, people think of non-cash rewards separately
- **Evaluability:** when deciding whether to pursue an incentive, employees first must evaluate what an item is worth to them. Because non-cash rewards are more emotionally charged, employees tend to evaluate them higher. This is especially true considering that people tend to imagine best case scenarios when imagining themselves experiencing the award
- **Frequency of thought:** research shows that people think about non-cash rewards more frequently, which contributes to higher performance and motivation
- **Justifiability:** people tend to say they prefer cash because

they think they should, especially because the purchase of luxury items often creates feelings of guilt. However, research shows that people are actually more motivated by non-cash rewards (including people that state they prefer cash!).’

The white paper describes the ‘unique career opportunities’ of group incentive travel for employees. It quotes from research (unspecified) by SITE which states that the vast majority of incentive travel programme participants say that earning an incentive trip provides them with:

- **Executive interaction:** face time with the company’s senior leadership
- **Unique experiences:** the chance to take their spouse on a paid vacation – without the headache of planning it
- **Peer relationships:** time to connect with and build relationships with other top-performing colleagues
- **Recognition:** an opportunity to have their hard work recognised.’

2.4.4 IRF 2019 Trends Study

The Incentive Research Foundation (IRF) published its 2019 Trends Study in January 2019 and, while the research has a USA focus, many of the trends identified would seem to be applicable to other regions of the world as well (IRF, 2019). The study identifies ten key trends that will affect organisations, their products and services, and the workforce in 2019. From market optimism to concerns about risk and safety, the study describes key areas of change and their implications for workforce engagement, incentive travel and recognition. A selection of the findings is shown below:

1. **The Economy and Merger & Acquisition Activity** – the

end of 2018 saw a great deal of market volatility with some of the largest U.S. stock market swings to date. Such volatility prompts many discussions around the economic outlook and its impact on incentives, rewards and recognition. On the incentive travel side of the market, things were somewhat neutral, with net optimism at just 3%. The 2018 ‘Incentive Travel Industry Index’ showed that internationally almost a third of planners (32%) said the national economy was having a positive impact on programmes, while 29% saw it as having a negative impact. North America was notably more positive in comparison to the rest of the world (35% vs. 28%). The Incentive Research Foundation has found optimism on the travel side of the market to be more continuously volatile in response to economic conditions than the gift card or merchandise side of the market.

2. **Physical and Data Security Are Still Paramount – With More Resources Coming** – both physical and data security remain a top concern for buyers and sellers involved in planning not just incentive travel and motivational meetings, but also gift card, merchandise, and points programmes.
3. **Incentive Travel on the Rise: Contributing Factors** – the forecast is a sunny one for incentive travel – with growth supported by expanding budgets, increased participant eligibility, and improved internal and public perceptions of incentive travel programmes, according to the 2018 ‘Incentive Travel Industry Index’. Buyers’ average spend on travel programmes has increased significantly in 2017 and 2018, as compared to previous years. In fact, about

one in two buyers report that their overall incentive travel budget has increased, and more than half of all buyers plan to increase the number of people who are eligible for travel rewards. Per person median spend was reported at \$4,000 while per person average spend for corporate buyers was \$8,151 and \$5,193 for agencies. This wide range and notable difference between the median and the average spend on incentives is the result of a growing number of outliers who are spending as much as \$50,000 per person. Many planners stick close to home, but long haul is still growing. North America leads the way as the top incentive travel destination for U.S. programme owners and providers, with the Caribbean, Western Europe, and Australia/Pacific following close behind.

4. **Agility, Experiences and the Design Imperative** – it will become increasingly imperative for incentive travel and programme managers to apply design thinking to their process. The ‘standard three- or five-day’ schedule will no longer meet client and rewardee needs. Incentive travel managers and programme owners will need to continuously test new and different ways to engage attendees in transformational experiences. Incentive travel now needs to entice an evermore travelled and experience-hungry generation. Designing for these increasingly savvy travellers will press the bounds of regular programme planning, calling on programme designers to continuously test new ideas and incorporate changes quickly.

CASE STUDY 2.3 The UK as a MICE Destination for Chinese Incentive Groups

As a company, China Holidays Ltd always recommends the UK as the destination of choice to our clients when they start planning their next trip. This is because we believe the UK has three key strengths which will be of interest to, or a benefit for, our Chinese groups.

The first is that the UK represents “old-fashioned capitalism”. This makes it both mysterious and fascinating to most Chinese people and has kept it at the top of the most desirable destinations list for Chinese travellers. For incentive group organisers, this makes the UK important, as our clients want to send their employees or agents to be inspired by the luxury and desirability of a foreign visit.

The second is that the UK has such a wealth of rich and varied tourism resources. Its diverse culture, charming historical atmosphere, linked with its many UNESCO-listed World Heritage Sites, makes it the only country in the world that can offer tourists so many scenic spots in one short journey. Along with its mild climate, which is welcomed by so many Chinese, they are attracted to the convenient transport systems and the relatively low crime rate.

Last, and certainly not least, is that the UK is rich in MICE resources, which enable local arrangements to be made more easily and smoothly. The ability to use the accumulated knowledge of mature local tour operators and coach companies who are experienced in handling incentive groups is a great advantage. Then, when coupled with the wide variety of hotels and venues that can accommodate large groups and events easily, the UK shines out as a go-to destination.

At China Holidays, our typical incentive group size is between 30-60 people, but we always get some big groups in excess of 150. In recent years, we have also managed some larger groups of 1,300, 850 and 750 pax, all with their own unique challenges.

For our smaller groups (less than 100 pax), we tend to take them to visit and stay in a number of cities across the UK, as their visits usually last around eight days. The most popular cities tend to be London, Edinburgh, Oxford, Cambridge and York. Our larger groups, especially those in the hundreds, tend to be based in London and have day trips to surrounding cities and attractions. These groups are also more likely to have a shorter stay in the UK, usually no more than five nights.

London is by far the most requested incentive group stay in the UK, not least for its abundance of luxury hotels – a must for the larger groups. But as the largest financial centre in Europe and the world’s top financial hub, to pay a visit to the ‘centre of capitalism’ is seen as the highpoint for many of these companies. Then, when added to its many attractions and proximity to so many easily reached towns and cities, that include Oxford, Cambridge, Bath and Stratford-upon-Avon, it becomes the obvious choice.

In the 20 years that we have been organising and handling Chinese incentive groups into the UK, the feedback has always been positive. Both our clients and their travellers/delegates have been positive about their impression of Britain as a multicultural and open-minded society. Their feedback also frequently mentions many other attributes: the Royal Family, well preserved castles, famous universities, the tranquil countryside, a shopping paradise and, of course, Harry Potter!

Although there are some negative issues raised, like cost and the British visa process, the UK is still seen as an aspirational place to visit. In fact, for most of our clients, an incentive trip to the UK is the top prize for their highest performing staff and agents.

However, we are seeing improvements following the successful introduction of the British Embassy’s New MICE Scheme in 2018. MICE group organisers are now being provided with a personalised customer service and a more streamlined visa application process.

So, what could the UK be doing better? Greater promotion and additional support are needed from the government. If the enormous advantages of the UK and its MICE industry could be clearly communicated to the wider circle of Chinese incentive organisers, we could counter the fierce competition from Australia, America and our European neighbours. The impact of a comparatively small investment by the government would not only benefit the MICE industry but the country as a whole.

Stephanie Cheng, China Holidays Ltd
www.hellobritain.cn

2.5 Corporate Hospitality and Corporate Events

2.5.1 Introduction

The corporate events segment covers incentive travel, client entertainment, staff entertainment, meetings and conferences and so has a clear overlap with some of the other segments described separately in this Report. However, this section of the Report is written specifically from the perspective of companies providing specialist services to the corporate events segment, thus complementing information to be found elsewhere.

Corporate hospitality is a crucial part of the marketing mix, as it demonstrates a company's willingness to get to know people as people. Through face-to-face time in an enjoyable and relaxed environment, companies can build a long-lasting rapport with their business associates, and develop a greater understanding of their priorities and needs. It is also a cost-effective way of associating a company brand with an iconic event.

2.5.2 Raconteur Feature on Corporate Hospitality Events

A 2016 feature on corporate hospitality events written by Nick Martindale for Raconteur states that such events are seeing a good return on investment (ROI) (Martindale, 2016). 'It comes at a price, but increasingly inventive corporate hospitality creates a valuable bond with clients and business partners – and delivers a return on investment.' The feature suggests that the UK has been spoilt for choice in recent years when it comes to major sporting events (the 2012 Olympic Games, the Commonwealth Games of 2014, and the Rugby World Cup, for example) which have presented huge opportunities to those wanting to entertain corporate clients. These are alongside the annual calendar of high-profile events such as Wimbledon, the Silverstone Grand

Prix and the Epsom Derby, in addition to regular Premier League football, international cricket and Six Nations rugby fixtures.

Martindale says that 'such events do not come cheap to those who wish to make a good impression on clients and business partners. But research by STH Group, the official hospitality provider for the last three Rugby World Cups and the 2019 tournament in Japan, suggests it is a price worth paying. More than 80% of those who buy corporate hospitality believe it is extremely effective at improving relations with clients, while 71% of those who attend such events as guests say they are likely to increase the amount they spend with that company as a result.'

The Raconteur feature describes a competitive market place, with expectations rising, both from clients and their guests. It quotes Tim Connor, chief executive of Connoco Group, as saying:

"Hospitality no longer starts at the turnstile. The packages that are more popular include limo pick-up, restaurant bookings and even a hotel. Often there is ancillary hospitality too, where the wife and children may come with the client into London, but require a different hospitality service such as theatre or shopping trips while dad is watching the event. Top-quality food is also now essential, with an increased demand for Michelin-star standard catering at even relatively ordinary events."

Growing expectations have also extended to the sporting arena itself, with guests increasingly expecting some kind of enhanced experience, such as access to areas which ordinary fans would not be granted. This can create challenges for some events and sports. This desire to push boundaries has also spread to include access to players or high-profile sports or celebrity figures. This can also extend to taking part in certain

competitions or post-match events.

Raconteur quotes Luke D'Arcy, UK president of brand experience agency Momentum Worldwide, pointing to a rise in 'VIP experience':

"Why watch the Americas Cup when you can be part of the team for a leg? Why just watch Usain Bolt run in Rio when you can have him DJ the after-party and spin your tunes like he did for Nissan? Why just watch the US Open with American Express when you can take on a virtual Sharapova in a match using virtual reality? Participation experience is everything."

Raconteur concludes its feature by stating that there is 'no doubt the market will continue to evolve, and providers, sports venues and clients will need to come up with evermore creative ways to ensure guests feel they have experienced something a bit different'.

2.5.3 Keith Prowse Survey

A 2013 survey of senior company representatives by hospitality provider Keith Prowse showed that two-thirds of those surveyed use corporate hospitality to encourage engagement between clients or staff which leads to better relationships (Keith Prowse, 2013). The report underlines hospitality as a bona fide relationship-building tool which is used:

- To encourage engagement between clients and/or staff which leads to better business relationships (by 66 per cent of respondents)
- To provide an inspirational setting to aid interactivity (used by 49 per cent)
- 89 per cent use the traditional meeting format to obtain direct business decisions.

Other key reasons identified by Keith Prowse for companies choosing sporting and cultural events to



Image courtesy of Thirsk Racecourse & Events

entertain staff and clients were:

- 76 per cent agreed that being taken to a hospitality event underlines the value of the guests' organisation
- 96 per cent agreed that face-to-face interaction with co-workers is necessary for effective teamwork
- 97 per cent agreed that 'downtime' with clients builds stronger relationships.

The results also reveal the growing fluidity of meetings and that they regularly run over the average 60-minute time frame, which perhaps explains why guests opt to entertain at day-long sporting and cultural events.

2.6 Outdoor Events

2.6.1 Definition and Background

The outdoor events industry is a dynamic segment of the business visits and events sector. Outdoor events have taken place in the UK since time immemorial, despite our

unpredictable weather, but the first real information on such events, jousting tournaments and village fairs, for example, developed from the times of the Crusades in the 11th and 12th centuries. Nowadays, outdoor events take place in every corner of the UK: city centres, rural areas, mountain and coastal regions and even in very remote locations.

Outdoor events bring life and vibrancy to urban and rural spaces, often creating opportunities for activities to reach people and communities who do not have indoor spaces. They can help to bring about social cohesion in communities as well as offering people a chance to escape and enjoy the countryside and outdoors.

High profile outdoor events cover a breadth of activity from major festivals (such as Edinburgh International Festival), music events (e.g. Glastonbury), agricultural shows, sporting and charity events through to small village and craft events. From the beginning, outdoor events have drawn large

gatherings whether local, national or international. The visitor from abroad is attracted to a myriad of events in the UK, many of them being steeped in tradition and history.

The world of outdoor events has developed into a highly professional and quality standard industry made up of local authorities, show organisers, event management companies, promoters, venue owners, together with suppliers of equipment and services, and consultants.

2.6.2 'Value of Outdoor Events 2018 (UK)'

New research into the outdoor events sector has been undertaken by Bournemouth University on behalf of the Events Industry Forum (EIF) and was published in October 2019 as the 'Value of Outdoor Events 2018 (UK)', and this research forms the basis of the following text on outdoor events (Jackson, Blake & Hibbert, 2019).

Table 2.3 Explanation of outdoor event type categories

Category of outdoor event	Description	Sub-categories	Examples
1. Outdoor music concert or festival	An outdoor event where the core content/ programme is music, of whatever genre	Rock, classical, electronic dance music	Shambala https://www.shambalafestival.org Towersey Festival https://www.towerseyfestival.com/
2. Outdoor arts or cultural festival/show/fete/carnival/parade	An outdoor event where the core content is creative and cultural in essence. The main purpose is celebratory, entertaining and public in nature	Performing arts, art, film, pyrotechnics, aeroplane, light, food, literary, historical, seasonal, religious, political	Notting Hill Carnival https://nhcarnival.org Whit Walks http://whitfriday.brassbands.saddleworth.org/Walks.html Bournemouth Arts by the Sea Festival https://artsbythesea.co.uk
3. Outdoor fair/exhibition/trade show/rally	An outdoor event where the main aim is to showcase the content/ programme for trade and promotional reasons	Country, agricultural, horticultural, animal, steam, funfair, environmental, nature, waterways, non-permanent markets (farmers, Christmas)	Bath & West Show https://www.bathandwest.com/royal-bath-and-west-show Great Dorset Steam Fair https://www.gdsf.co.uk/ Royal Highland Show https://www.royalhighlandshow.org/
4. Outdoor recreational and sporting events/tournaments/regattas	The main element is physical activity on behalf of the majority of participants. There may be spectators, but the main emphasis is on the participants	Highland Games, competitions, fun runs, obstacle races, walking, sportive, wellbeing	Edinburgh Marathon https://www.edinburghmarathon.com/ Walking festivals https://www.walescoastpath.gov.uk/latest-news/news-and-press-releases/walking-festivals/?lang=en
5. Outdoor corporate events	These events are corporate with the main aim of bringing people together for corporate/business reasons	Outdoor product launches, experiential, team-building	Todds Leap https://www.toddsleap.com/book/17/extreme-play-day Weatherized (Amplify) https://www.weareamplify.com/work/weatherized/

Source: Value of Outdoor Events 2018 (UK)

Table 2.4 Summary of the economic contribution of UK outdoor events in 2018

Type of Outdoor Event	Total Attendances (millions)	Total Spend (£ millions)	Spend per Event (£)	GVA Contribution (£ millions)	Employment (FTE jobs)
Music	35.3	17,606	499.13	13,588	234,380
Arts and Culture	29.5	5,590	189.22	4,384	92,692
Fairs and Shows	43.3	5,994	138.51	4,695	81,501
Recreation	29.5	9,643	327.31	7,166	168,269
Corporate	3.9	690	175.16	534	12,257
Totals	141.5	39,523	279.33	30,367	589,099

Source: Value of Outdoor Events 2018 (UK)

By their very nature, outdoor events are difficult to capture and measure, involving a plethora of types, locations and organisations. The outdoor events sector covers a diversity of types of event involving a variety of people and organisations. What brings them together are the challenges of being temporary in structure, as well as in time, and their openness to the vagaries of the weather.

For the purposes of scoping out the research for the 'Value of Outdoor Events 2018 (UK)' (VOE) study, the following definitions were applied:

- That events were predominantly outdoors. The definition given for the research surveys was to include events with some indoor activity but where, most of the time, visitors were outdoors. Temporary structures such as tents, marquees and temporary buildings were included as being outdoors
- That the events made use of temporary structures, whether for cover or not
- That planned/coordinated activities were temporary in nature (did not last longer than a month)
- That events were public (i.e. not private weddings or meetings)
- That events were 'special' and not part of a programme of outdoor activities, such as weekly park runs.

There are many ways of distinguishing events, from their size, type of content, type of venue, or even their purpose. For this research events were categorised into five different types, based predominantly on their main purpose. These categories mirror,

as closely as possible, the Great Britain Day Visitor classifications. They incorporate the 16 event types identified by the Events Industry Forum and offer a broader definition based on the main criteria of being essentially public and outdoor. Table 2.3 summarises the outdoor event categories used in the VOE research.

Many of these events last from one to three days and attract thousands of visitors, which can involve considerable travel and overnight stays in places ranging from campsites to hotels.

2.6.3 Economic Contribution of Outdoor Events

Many of the events bring substantial benefits for local economies, adding to spend from visitors and tourists, and hence generate more employment and wealth for local communities.

The VOE research reveals that, in 2018, there were 141.5 million visits to outdoor events, with a total on-site and off-site spend of £39.5 billion. Using accepted multipliers, this means that the Gross Value Added (GVA) contribution was £30.4 billion, with a full-time equivalent employment of just under 600,000 people.

Table 2.4 summarises the economic and employment contributions made by outdoor events to the UK economy in 2018. It shows that, while fairs and shows have the highest attendance figures, they are generally more local and so the spend per event is less. Corporate events are less frequent and so play a smaller part but are significant enough for them to be recognised as a component of the outdoor event sector.

Outdoor music events and festivals provide the greatest economic

contribution, with the highest spend per event visit, GVA contribution and employment. Music and recreational events predominantly encourage overnight stays, supporting accommodation providers (including retailing of mobile accommodation) as well as food, drink, travel, durable goods and merchandise suppliers. Figure 2.19 shows the share of spend by type of outdoor event.

2.6.4 Attendance at Outdoor Events

Attendance figures for events are not only important for those generating an income through ticket sales or secondary spend but also as an indicator of how relevant such events are to a person's lifestyle and quality of life. The total number of attendances at outdoor events in 2018 was 141.5 million. Figure 2.20 illustrates how the share of attendances breaks down by different types of outdoor event.

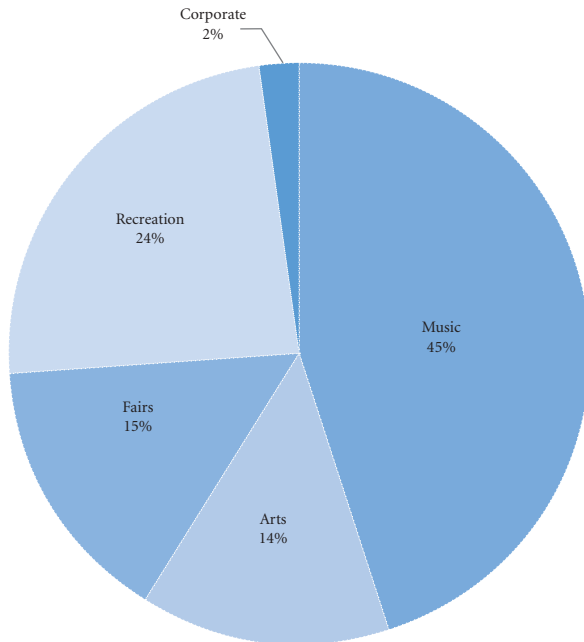
2.6.5 Employment in Outdoor Events

The value of events can be measured in terms of full-time equivalent (FTE) employment figures. The total FTE employment in outdoor events is 589,000. Music events have the highest FTE employment (234,380) followed by recreation (168,269), arts (92,692), fairs (81,501) and corporate events (12,257).

2.6.6 Economic Contribution of Each UK Nation and English Region

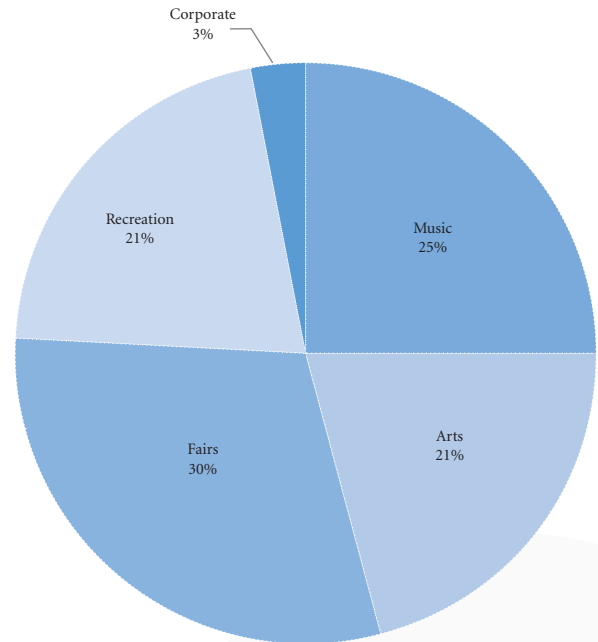
As well as the different types of events organised across the UK, the VOE data also reveals the contribution outdoor events make by UK region. Based upon an analysis of where survey respondents said that they had attended outdoor events in 2018, Table 2.5 summarises the totals by nation and region.

Figure 2.19 Proportion of spend by type of outdoor event



Source: Value of Outdoor Events 2018 (UK)

Figure 2.20 Share of attendances by different type of event



Source: Value of Outdoor Events 2018 (UK)

Table 2.5 Regional and National Contributions of Outdoor Events

Nation and Region	Total Attendances (millions)	Total Spend (£ millions)	Spend per Event Visit (£)	GVA Contribution (£ millions)	Employment (FTE jobs)
England					
East of England	13.9	3,290	236.60	2,555	48,390
East Midlands	12.0	3,184	190.64	2,286	44,376
London	24.9	8,394	336.96	6,486	126,717
North East England	5.9	1,608	271.47	1,248	23,335
North West England	12.7	4,305	338.26	3,314	69,130
South East England	17.8	4,281	240.42	3,314	63,095
South West England	12.5	3,092	246.89	2,348	43,999
West Midlands	11.1	2,705	242.94	2,102	40,829
Yorkshire and the Humber	10.4	2,396	231.46	1,854	35,066
Northern Ireland	4.2	1,494	354.49	1,140	23,279
Scotland	10.2	3,538	347.61	2,758	52,801
Wales	5.8	1,237	212.27	961	18,083
Totals UK	141.5	39,523	279.33	30,367	589,099

Source: Value of Outdoor Events 2018 (UK).

Table 2.5 shows that the 141.5 million event attendances are reasonably spread geographically and broadly reflect the UK's population concentrations, with London having the highest attendances.

CASE STUDY 2.4 British Air Display Association – Air Display Industry Review 2019

The British Air Display Association (BADA) was formed in 2011 following a number of successful informal meetings by organisers, pilots and others associated with air displays. These meetings identified a need to have an organisation to encourage, promote and advance safety and standards in British air displays whilst encouraging open discussion on all aspects of staging an airshow, from the smallest, involving a couple of flying displays, to the largest with international following.

Organising an airshow is more than just asking a few pilots to come along and fly their aircraft and the members of BADA represent every aspect of the air display community, from organisers and pilots to commentators and showground contractors.

For its review of the air display industry in 2019, BADA questioned the organisers of the 38 largest air display venues, representing 95% of the permissions issued for events with more than 5 flying assets. This case study summarises some of the key findings from the review.

While 2018 had seen a return to spectator numbers not seen since 2015, assisted by some excellent weather and the RAF100 celebrations, the British air display industry faced a tougher year in 2019, with some inclement weather conditions and the UK's premier air show (the Red Arrows) being absent from the calendar in August and September.

The news that the Red Arrows (officially known as the Royal Air Force Aerobatic Team – RAFAT) were embarking on an overseas tour of Canada and the USA during August and September, the height of the UK airshow season, was greeted with dismay by the majority of sea front show organisers, who were most affected by their absence. RAFAT are far and away the biggest draw on the British air display circuit and their departure at the end of July meant that they were absent from the three biggest events on the display calendar – namely Sunderland, Eastbourne and Bournemouth. In addition, Clacton, Southport, Jersey, Rhyl, Blackpool, Portrush and Biggin Hill all missed out on a potential RAFAT display.

2019 marked the first year that UK air shows came to the attention of climate change protesters. Swansea and Yeovilton were targeted by Extinction Rebellion, with a peaceful protest on the beach at Swansea and a protester cycling along the runway at RNAS Yeovilton Air Display, prior to the display. Elsewhere, several events took intelligence regarding potential protests at their displays very seriously, although they failed to materialise.

Seafront Displays

2019 was a mixed year for seafront displays. Early in the season, the weather prevented several weekend locations from achieving two flying days, whilst the August and September events were impacted by the loss of the RAFAT to its US tour. There was a reduction in the number of events in this category due to the Scottish International Air Show being unable to find an alternative location to Ayr, Great Yarmouth finding the losses incurred in 2018 made a repeat unsustainable, and Llandudno's 2018 event being a single year event. One new air show entered the calendar at Teignmouth in Devon.

The combined attendance for air displays in this category was an estimated 3.45 million. This marks a 19% decrease on the 2018 figure.

No new economic impact surveys were commissioned for 2019. However, most surveys commissioned by event organisers previously have produced a result in the region of £26 per person in economic value. If this figure is applied to the total attendance numbers in 2019, then the economic impact is estimated at £90 million.

Smaller Events

In general, 2019 was a good year for the smaller, multi-asset events. Weather conditions were never poor enough to make a significant impact on the success of most locations. The sector saw some expansion with the addition of Lee on Solent to the calendar, and Duxford hosting a series of smaller displays to showcase their based aircraft. The Midlands Air Festival returned, albeit in a different location.

The total attendance for events in this category was just over 127,000, representing an increase of 17.5% on the 2018 figure.

Larger Events

2019 was a stable season for the bigger inland shows. The same eight locations returned to the calendar and all experienced successful air displays, although there was no major theme to replace the RAF100 anniversary of 2018.

Attendance figures for this category were 395,000, a 22% decrease on the 2018 season, due in part to the fact that the RAF100 celebrations of 2018 led to an extra full display day.

Conclusion

Following the success of the 2018 season, 2019 saw a contraction of the number of displays in the seafront category, which accounts for 70% of the spectator total.

CASE STUDY 2.4 Cont'd

This resulted in a fall in the number of people attending air displays and reduced the estimated total attendance to 4.9 million people, an 8% drop on 2018.

For now, air displays continue to be the UK's third largest outdoor spectator sector after football and horse racing.

It should be noted that an increasing number of display venues, especially in the seafront sector, are diversifying their offering beyond aircraft and flying, to include a range of family-friendly ground-based activities to attract more people and protect against inclement weather.

The exact value of the economic benefit provided by the main events interviewed for this review continues to become more accurate as organisers invest in professional surveys. For 2019, a conservative estimate of £120 million can be attributed to the value of the air display industry to the UK economy. In addition to this figure, another £15 million budgetary spend can be added for money spent on actually delivering the events to the general public. This figure does not include any benefits from the 200 or so smaller, 1-3 asset displays.

For further information visit: www.bada-uk.com

CASE STUDY 2.5 Hyde Park Winter Wonderland 2018-19

This case study is based on an article entitled 'Winter Wonder' that appeared in Stand Out magazine (Stand Out, 2019a).

In 2018 The Royal Parks awarded event organiser IMG a new six-year contract to manage and produce Hyde Park Winter Wonderland through to 2023-24. The last event ran from November 22, 2018 until January 6, 2019, and was its 12th outing and the first year of the new six-year tenure for IMG.

Suzy Griffiths, IMG's event director for Hyde Park Winter Wonderland, describes the event as follows: *"Hyde Park Winter Wonderland really isn't like any other event out there. I find it difficult to explain to people who have never been before. It's not like a festival, or a normal event, and it's not a theme park either. It's unlike anything I've seen before, of this scale, or this popularity, that lasts for 45 days."*

When tendering for the new contract, Suzy Griffiths said that, if IMG wanted to make the event bigger and better for the next six years, interesting plans would be needed to keep it fresh. She added: *"The one thing about Winter Wonderland is that it's such a nostalgic time of year that people have a certain list of things that they want to do when they come here. Some people have family traditions and we're super-proud that people make Winter Wonderland their annual tradition. So I know there are things that, if I changed, it would almost be sacrilegious, but we've got to keep it fresh and dynamic."*

While innovations over recent years have included the Winter Wonderland Comedy Club, ice sculpting workshops and Peter Pan on ice, such changes are small in comparison because, in 2018-19, the IMG team (a full-time team of 10) completely re-designed the 144,000 square metre site. New features included a decision to increase the number of entrances at the event from three to five – two new entrances enhanced pedestrian flow

(there is a policy of 100 per cent bag search for visitors), and included a dedicated family entrance and a gate for visitors with pre-booked tickets.

Suzy Griffiths explains: *"Our event is a tale of two halves in terms of demographic. Winter Wonderland is really popular with families and we want to improve on that year on year. How do we make the event easier for those with small children coming between 10am and 6pm? Then at 6pm, families are tired and there's a mass exodus – the work parties, romantic dates and young thrill seekers come from 6pm, so it's about how we can make the site work better for those two groups as they're mingling."*

To achieve that aim, IMG zoned the event and colour-coded each zone, making it easier for certain demographics, such as families, to find their way around the site. For example, purple gate was dedicated to people with pre-booked tickets. Zoning the areas had a big influence on design – it meant that the majority of things that were pre-bookable were placed in the same quadrant as purple gate.

Contactless technology was deployed site-wide with hundreds of tap and pay points installed by Google Pay. Griffiths looked at other events using RFID and pre-loaded wristbands and had to convince some ride operators that the introduction of RFID and contactless payments was a good thing.

Hyde Park Winter Wonderland 2018-19 had more of a focus on family attractions, including a real ice slide, ice trike trail, Snowman Experience, Teletubbies Christmas show, Peter Pan On Ice, and evening parades on quiet days.

Furthermore, there was a big push on sustainability – staff were given reusable bottles in order to cut down on single use plastic, and 90 per cent of ride lights moved over to energy efficient LED bulbs.



Image courtesy of Leeds City Council

2.7 Music Events and Festivals

2.7.1 Definition and Background

The live music sector covers a huge variety of events from major concerts held in stadiums and large music festivals, such as Glastonbury, which attract hundreds of thousands of people, to small local festivals that have audiences of a few hundred.

In addition to these outdoor events, there are thousands of music events that take place each year indoors, held in a variety of venues from major arenas to pubs.

The UK is home to a host of internationally acclaimed festivals and concerts, covering a diverse range of musical genres. From Glastonbury to the BBC Proms, from Creamfields to Reading and Leeds, the UK's live music industry is world-renowned in terms of talent, quality and production.

According to Pollstar magazine, in 2017 The O2 in London was the most popular live music arena in the world (UK Music, 2018). Two other

UK arenas, Manchester Arena and SSE Hydro in Glasgow, also featured in the global top four.

The increasing popularity of metropolitan music festivals such as Liverpool Sound City and Live at Leeds represents a positive development for live music across the country.

Grassroots music venues play a vital role in supporting the industry's infrastructure and ensuring a healthy music industry nationwide. They also nurture the music industry's talent pipeline. Many are struggling for survival, however, with an estimated 35% of grassroots music venues closing in the last ten years.

2.7.2 UK Music Research

UK Music is the umbrella organisation which represents the collective interests of the UK's commercial music industry – from songwriters and composers, artists and musicians, record producers and music managers to record labels, music publishers, the live music sector, and music licensing

societies. In November 2019, UK Music published its annual research into the music sector, entitled 'Music by Numbers 2019'. The following information is drawn from this report and is reproduced with permission:

The music industry's rich and varied programme of concerts and festivals continued to attract an increasing number of fans in 2018, with 29.8 million people attending live music events in the UK, a rise of 2% from 29.1 million in 2017. Total concert attendance in 2018 remained level at 24.9 million, but again the biggest growth was festivals, where the total audience rose by 23% to 4.9 million – up from 4 million in 2017.

The area of the live music industry defined as 'music tourism' generated £4.5 billion in spend in 2018, rising 13% from £4 billion in 2017. A domestic music tourist is defined as 'someone who travels at least three times the average commuting distance in the Government Office Region in which the event took place in order to attend the event'. An overseas music

tourist is defined as ‘someone who booked a ticket to a music event from their home address in a country outside the UK’. A total of 11.2 million music tourists enjoyed events in the UK in 2018 – up 3% from 10.9 million in 2017 (and compared with 6.5 million in 2012).

Overseas visitors (music tourists) increased by 10% from 810,000 in 2017 to 888,000 in 2018, while domestic tourists accounted for 10.3 million of the total figure (of 11.2 million), a rise of 2% from 10 million in 2017.

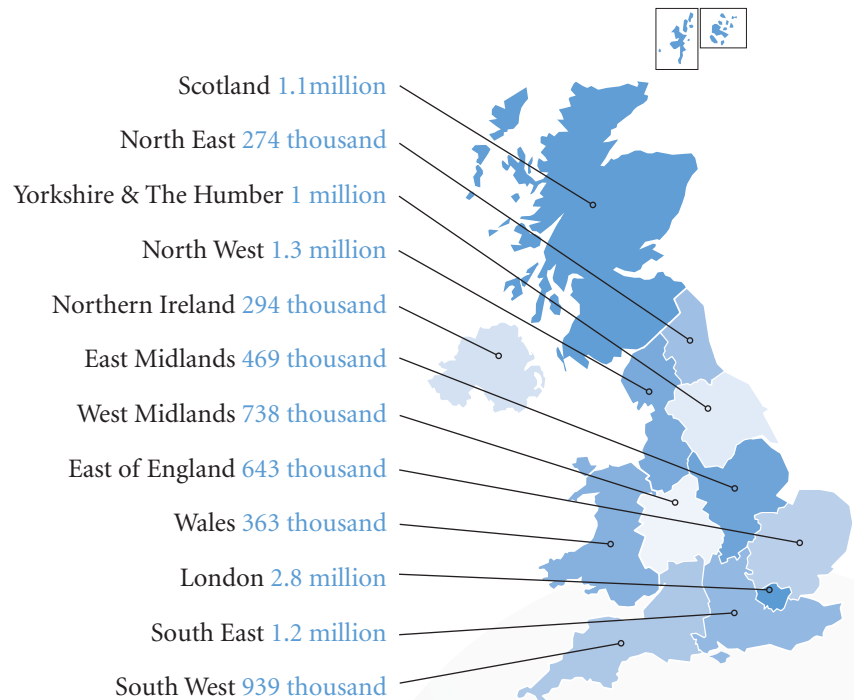
A total of 45,530 full-time jobs were sustained by music tourism in 2018 – a 1% increase from 44,896 in 2017.

Figure 2.21 shows the total number of tourists attending live music events across each region of the UK in 2018. Scotland saw the strongest growth, rising from 800,000 tourists in 2017 to 1.1 million in 2018. New festivals such as ‘Summer Sessions’ helped to attract the growing number of music tourists. London attracted the largest number of music tourists with 2.8 million visiting the capital, lured partly by the range of festivals in parks, such as ‘Wireless’ and ‘Lovebox’.

Figure 2.22 displays the total amount of spend generated by music tourists per region. This includes direct spend such as tickets, merchandise and money spent on drinks, food and accommodation, as well as indirect spend, which covers costs created by organisers in running the event, such as hiring space or equipment. London saw the greatest amount of spending by music tourists who spent £1.2 billion. Other regions that saw large increases in tourist spend included Yorkshire and the Humber, Scotland and North East England.

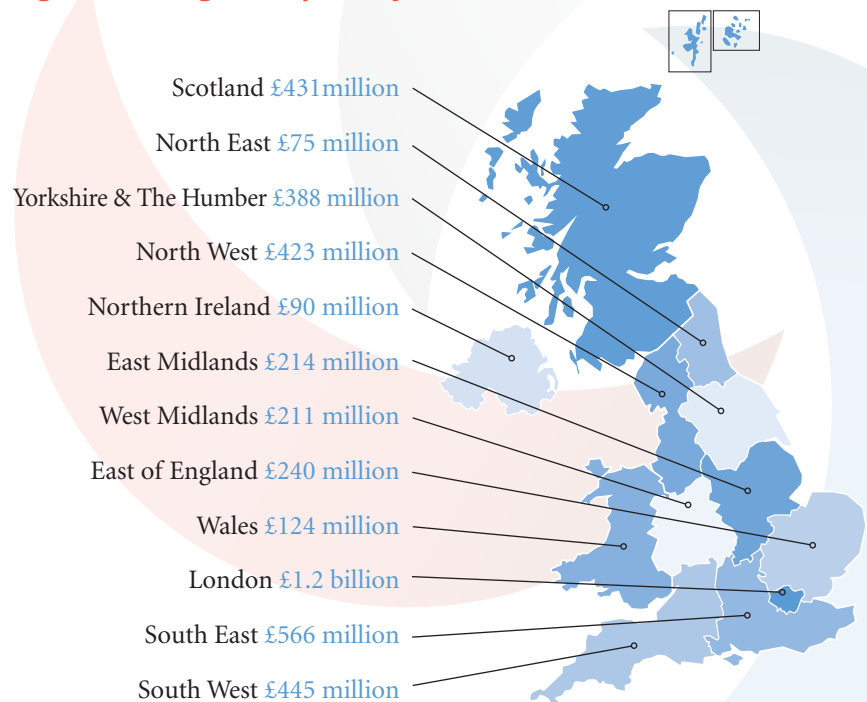
The average spend by overseas music tourists was £851 in 2018 – a rise of 13% on the £750 of 2017. The figure

Figure 2.21 Distribution of Music Tourists by Region in 2018



Source: ‘Music by Numbers 2019’, published by UK Music

Figure 2.22 Regional Spend by Music Tourists in 2018



Source: ‘Music by Numbers 2019’, published by UK Music

For further information on UK Music’s research, visit: www.ukmusic.org

was more than four times higher than the £196 average spend by domestic music tourists in 2018 – up by 5% on the £186 of 2017.

The map in Figure 2.23 shows the number of full-time equivalent (FTE) jobs sustained by music tourism broken down by region. Roles within the industry range from promoters and sound engineers to security and bar staff, and reach across a range of pay grades and skill levels. Many learn on the job, as well as attending college and university courses.

Employment numbers have risen by 15% over the past three years. The nature of the industry means that many festival jobs are filled by freelancers and seasonal workers, many returning to the same events every year.

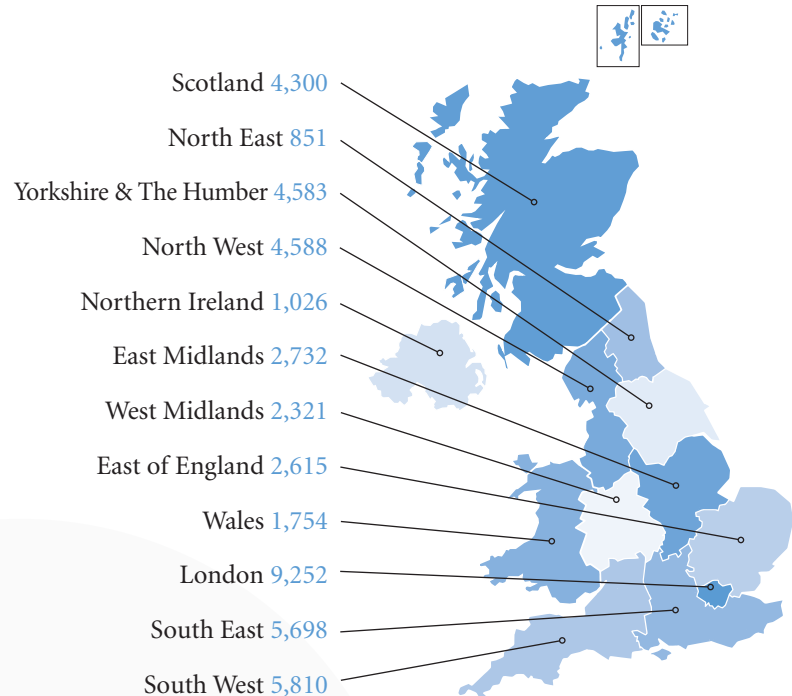
2.7.3 Festival Superfans

A BBC news item, ‘Superfans keep UK festivals going’ (BBC, 2016) quoted research commissioned by Eventbrite (based on a survey of 504 UK residents) suggesting that a core group of ‘superfans’ are the bedrock of the UK’s festival scene, attending four or more events a year. These superfans spend an average of £581 a year on music festivals, often opting for VIP passes or upgraded camping options. Predominantly male, these superfans help to drive the music festivals market, often recommending music and events to their friends. On average, they spend £45 more per event than a casual fan.

2.7.4 Challenges Facing Small Music Venues

An article published by Access All Areas (Access All Areas, 2019a) summarises research by Insure4Music which has found that 20% of small music venues in the UK have closed in the last 15 years, with one small music venue closing every month over the last two years. The article says that this

Figure 2.23 Jobs Sustained by Music Tourism per Region in 2018



Source: ‘Music by Numbers 2019’, published by UK Music

is despite extensive lobbying from various politicians and organisations to safeguard the UK’s grassroots music scene. A large majority of these venues have closed due to rent increases, with the government excluding music venues from a reduction in business rates being offered to small businesses at the

start of 2019. Others have closed due to redevelopment and noise complaints, and some because of lack of footfall. Insure4Music has published an interactive map to illustrate the UK’s open and closed small music venues, which may be viewed at: <https://www.insure4music.co.uk/venue-index/>

CASE STUDY 2.6 Victorious Festival, Portsmouth

Victorious Festival, the UK’s biggest metropolitan festival, released a report showing the event’s economic impact on Portsmouth (Access All Areas, 2019). The festival contributed £9,842,258 to the local economy in 2018 alone. Those who visited Portsmouth for the day during the weekend of the festival (August 2018) increased their spend per person from £68.47 in 2017 to £85.60 in 2018. Over a third (35%) of festival-goers who visited the area across the weekend of Victorious said they had a more positive view of Portsmouth, with 30% of visitors confirming they are more likely to re-visit the city in the future. A total of 120,126 people attended the festival in 2018 with 67% of visitors coming from Hampshire and 34% from Portsmouth itself. Ninety per cent of visitors had attended previously and nearly a quarter (24%) bought tickets for the full three days. Victorious provides an eclectic mix of live music and DJ performances as well as locally sourced food markets and ale stalls, an arts and crafts marketplace, a kids arena hosting themed games, live performances and more.

CASE STUDY 2.7 Piping Live! 2017

Piping Live! is an annual event held in Glasgow that celebrates the bagpipe and piping bands (Event Impacts, 2017a). The 2017 event ran from 7-13 August and included performers from six overseas countries. The event attracted a total spectator attendance of 45,112 (13,078 unique spectators), of whom 27% were local

residents and 62% day visitors. Spectators attended for an average of 6.8 days and purchased, on average, 6.8 bednights. There was an average daily spend (non-accommodation) of £30. Piping Live! 2017 generated a direct economic impact of £2.6 million for Glasgow.



2.8 Sporting Events

2.8.1 Definition and Background

Sports tourism has been central to the growth in global travel and tourism during the new millennium. Sport also has a role to play in helping to address wider social issues: it can help to address gender inequality and assists with the development of life skills such as leadership, decision making, organisational and management skills. Sport can also act as an effective medium for conveying educational messages relating to health issues such as HIV/AIDS awareness and malaria.

The economies of cities, regions and – in the case of mega events

such as the Olympic Games or FIFA World Cup – entire countries are increasingly reliant on combining sport and tourism to jump-start economic and socio-economic change. Tourists engaged in sports tourism are high-spending, stay longer than other tourist categories, and often stimulate other forms of tourism. Their direct benefit to a destination is cash – their indirect benefit can be years of follow-on tourists.

2.8.2 UK Sport Resources and Research

UK Sport, founded by Royal Charter in 1997, provides strategic investment to enable Great Britain's Olympic and Paralympic sports and athletes to achieve their full

medal-winning potential. It has worked with a number of national and regional partners to develop the eventIMPACTS project – a toolkit of resources to help event organisers improve their evaluation of the impacts associated with the staging of sporting and cultural events. UK Sport suggests that (UK Sport, 2019):

In the past the success of an event has generally only been measured in economic and/or media returns on investment such as the economic impact to a region or the level of media exposure an event received. It has been much more difficult for event organisers to demonstrate and evidence all the additional benefits that can occur as a result of an event taking place. A relatively new agenda

is that major events can deliver directly, or act as catalysts for, wider social impacts or environmental impacts. The social impact of an event concerns its effect on the people and communities around which it takes place and includes, amongst other things, the development of skills and volunteering, inspiring participation and delivering satisfaction.

Major events can also have a variety of environmental impacts in the areas of waste, carbon and sustainability. It is increasingly important for event organisers to understand the scale of these impacts, in order to best develop systems that manage them.

The eventIMPACTS Toolkit has been developed by UK Sport, VisitBritain, Event Scotland, the London Development Agency, the North West Development Agency, Yorkshire Forward and Glasgow City Marketing Bureau. It comprises some key guidance and good practice principles for evaluating the social, economic, environmental and media-related impacts associated with staging major sporting and cultural events. (www.eventimpacts.com/)

UK Sport also published research in 2011 into 'The Inspirational Effect of Major Sporting Events' which found that:

- 67% of live spectators at the major sporting events studied felt inspired to participate or participate more frequently in sport as a result of their attendance at that event
- Over two-thirds of the British population (68%) had watched a major sporting event on TV in the three months prior to interview
- 28% of these viewers felt inspired to participate or participate more frequently in sport as a result of watching a major event on TV. The ability to inspire 280,000 people in

a broadcast that reaches one million viewers presents a significant opportunity to encourage people towards greater physical activity

- Major events are a particularly powerful way of inspiring young people to participate in sport. Nearly three-quarters of spectators under 25, and half of all TV event viewers under 25, felt inspired by that experience to participate more frequently in sport

The report makes a number of recommendations for maximising the benefits that arise from major sporting events, including the co-ordination of national/regional major event strategies with national/regional sports development strategies. It also suggests that major event organisers should consider how they can harness the inspirational impact of their events on live spectators.

2.8.3 Live Sport and Domestic Tourism in England

VisitEngland has published a topic paper under the heading 'Live Sport and Domestic Tourism' (VisitEngland, 2016) which focuses on domestic trips involving live sports, defined as those where respondents said that they took part in at least one of the following activities during their overnight or day trip:

- Watching a live football match (not on TV)
- Watching other live sport (not on TV)

The paper shows that, in 2015, there were 2.57 million domestic overnight trips in England which involved watching live sport, 3% of the total, with spending of nearly £631 million (3% of all spending on domestic overnight trips). There were also 55 million day visits which involved live sport, 4% of all tourism day visits in

England, with an associated spending of nearly £2.2 billion. These are trips where this activity was undertaken at least once. A single trip can involve multiple activities and so this activity was not necessarily the main purpose. See Table 2.6.

The spend figures in the topic paper relate to spending that took place during trips where visitors watched live sports. However, this is not the total spending attributable to (that is, motivated by) live sports. Spend attributable to live sport is estimated to be £3 billion among domestic visitors.

2.8.4 Economic Importance of Sport in Scotland

It can be reasonably argued that sporting events, whether this be major international events such as the Olympic Games or local events such as premier league football matches, act as drivers for the wider sporting economy. People watch such events on television, become interested, and look to get actively involved in the sport themselves, either as players or spectators. This, in turn, generates expenditure on sports goods, on sporting club subscriptions and fees, and a wide range of other products and services, with positive impacts for a country's economy.

A research report into the economic importance of sport in Scotland, produced in 2016 for sportscotland, the national agency for sport, by the Sport Industry Research Centre at Sheffield Hallam University, provides a snapshot of the role and significance of sport in Scotland in 2016 and summarises the key indicators for the economic importance of sport in Scotland (sportscotland, 2016). These are consumer expenditure, Gross Value Added (GVA) and employment. The report is the seventh study to be undertaken on the economic importance of sport for Scotland.

Some of the key findings of the research include:

In 2016, Scottish consumers spent £2,669 million on sport. Since 2014, this represents an increase of 7% (current prices) and 3% (constant prices – inflation adjusted). Consumer expenditure on sport in 2016 as a percentage of total expenditure in Scotland was 3.0% compared to 2.8% in 2014. Important categories of sport-related consumer spending include sport clothing and footwear (20%), sport gambling (17%), subscriptions and fees (16%) and sport TV (14%).

Sport-related economic activity generated £2,749 million GVA in 2016, representing an increase of 8% in current prices since 2014. The equivalent increase in GDP for the whole Scottish economy was 4%, indicating that the sport economy in Scotland has over-performed compared with the national average.

The sport economy in Scotland generated 64,800 sport-related jobs (full-time equivalent), corresponding to 2.7% of total employment in Scotland. Sport-related employment has increased by 13% since 2014.

Table 2.7 shows trends in the sport economy in Scotland during the period 1998-2016.

2.8.5 Inbound Football Tourism

VisitBritain/VisitEngland's research department sponsored a question on inbound visits to watch football matches in the Office for National Statistics' 'International Passenger Survey' for 2014 (VisitBritain, 2014). The research found that, with all the sports Britain has to offer, it is the chance to experience a live football match which attracts the largest volume of inbound visitors. The results showed that slightly more than 800,000 inbound visitors went to a football match – almost one in every 43 visitors and over 40,000

Table 2.6 Trips to watch live sports events in England in 2015

	Total England Trips in 2015	Live Sport Trips	Live Sport Trips (as % of total)
Domestic Overnight Trips			
Trips (millions)	102.73	2.57	3%
Spend (£ millions)	19,571	631	3%
Day Visits			
Trips (millions)	1,298	55	4%
Spend (£ millions)	46,422	2,186	5%

Source: VisitEngland paper 'Live Sport and Domestic Tourism'

Table 2.7 Main sport-related indicators for Scotland

	1998	2001	2004	2008	2010	2012	2014	2016
Consumer expenditure on sport (£ million)	1,019	1,266	1,567	1,830	1,898	2,120	2,493	2,669
Percentage of Scottish total	2.2	2.5	2.7	2.5	2.5	2.6	2.8	3.0
Sport-related GVA (£ million)	965	1,196	1,537	1,737	1,838	2,128	2,538	2,749
Percentage of Scottish total	1.5	1.7	1.9	1.7	1.9	2.0	2.1	2.1
Sport-related employment (thousands)	37.9	39.3	43.0	47.2	46.3	52.3	57.5	64.8
Percentage of Scottish total	1.6	1.8	2.0	2.1	2.2	2.5	2.6	2.7

Source: The Economic Importance of Sport in Scotland 1998-2016

international business visitors also managed to find time to go to a football match during their stay.

The top overseas markets sending people to watch live football in the UK are:

1. Irish Republic
2. Norway
3. Sweden
4. USA
5. Netherlands

While the Irish Republic leads the way in terms of the market generating the most football watching visits to the UK, Norway takes the top spot when considering propensity to go to a live football match at 11% of all visits featuring football watching. The average spend per visit for football spectators in 2014 was £855, whereas those who did not attend a match had an average spend of £628.

Of the visitors who gave their primary journey purpose to the UK

as 'to watch sport', almost three-quarters attended a football match, confirming that, of the live sports on offer in Britain, it is football that is attracting the largest volume of inbound visitors.

Regional Spread

Not only does football encourage visitors to come to Britain, it also encourages them to explore different parts of the country. In 2017 the top region was North West England with 11% of visitors, followed by North East England (6%) and Wales (3%). A follow-up question in the survey regarding the stadia visited showed that Old Trafford and the Emirates Stadium had the highest attendance of 109,000 inbound visitors.

2.8.6 StubHub Research into the Economic Impact of Sporting Events in the UK

StubHub claims to be the 'world's largest ticket marketplace spanning 44 countries', enabling fans to buy and sell tickets to tens of thousands of events. In July 2019 it published its first Live Events Index based on ticket purchases to UK-based events by international fans in the second quarter of 2019 (StubHub, 2019). The data reveals that thousands of fans travelled to the UK in that period to attend top-tier

sports events such as the tennis at Wimbledon and US sports leagues like the MLB London Series.

The index shows exactly how much attendance at one event boosts spending in the local community. Polling of attendees found that the average fan, when attending an event, spends:

- £79 on food and drink
- £70 on local shops or club stores
- £85 on travel
- £89 on accommodation
- £67 on other activities or events within the vicinity

Each attendee, therefore, boosts the local economy by approximately £390. To put this in context: the capacity of the O2 Arena in London is around 20,000 seats. If every seat is filled, that would provide the economy with a boost of around £7.8 million.

The index reveals that the MLB London Series baseball matches between the Boston Red Sox and the New York Yankees were the most popular events of the quarter overall (when looking at purchases on StubHub by both domestic and international fans). With tickets sold out for the two games in May, and

the London Stadium at maximum capacity, StubHub estimates that the 132,000 total visitors would have spent just over £9 million in local shops or club stores.

The most popular 'fan countries' (i.e. where fans travelled from to attend a live event in the UK) in Q2 2019 were:

1. United States
2. Ireland
3. Germany
4. Canada
5. Spain

2.8.7 Leicester and Leicestershire Sporting Economy

In its May 2019 issue, 'Access All Areas' magazine reported that Leicester and Leicestershire had launched a prospectus to promote their £285 million sporting economy (Access All Areas, 2019c). The sporting venues provide 8,450 jobs and attract two million visitors to the county each year. The prospectus showcases the extensive range of sporting venues in the city and county, the national and international sports events that have been hosted, and the other events and conferences that they are able to accommodate.

CASE STUDY 2.8 Liverpool Football Club's Winner's Parade 2019

'Stand Out' magazine describes the event planning required for the winner's parade when Liverpool FC won the UEFA Champions League in Madrid on Saturday 1st June 2019 (Stand Out, 2019b). For Liverpool City Council's events team, the victory signalled a flurry of activity to prepare for the team's homecoming parade the following (Sunday) afternoon. It is estimated that a 750,000-strong crowd gathered along the parade route, a 15-kilometre trail that traversed the city. The team travelled in three open top double decker buses and it is thought that some 200,000 fans lined the final kilometre and a half.

While the confirmation of the event came on the football match's final whistle, planning for the event had begun some months previously. The main bulk of the planning began in March 2019 when the prospect of holding two victory parades (Premier League and Champions League) looked possible. Discussions were held between the LCC events team and the police, Mersey Travel and Liverpool City Council highways department. The operational planning included a joint agency tabletop exercise on 3rd May, to familiarise the different agencies and their key staff with each other, the plans and communication strategies. Together, they worked through a few likely scenarios and looked back at the last parades in Liverpool: the 2005 Champions League win and FA Cup winning parade in 2006.

Susan Lees, city events manager at Culture Liverpool, said:

"A lot has evolved since those previous parades in event management and our understanding of crowd dynamics. We've taken lessons from 2005 and 2006 and used them in the planning of potential parades – and whilst many of the parades haven't happened up until today, each one we've learned something, even in the planning process, to make it better. We changed the route from 2006, with a detailed plan of road closures phased across the day. We monitored everything with CCTV and verbal comms on the ground and all the key stakeholders were present to make quick, effective decisions."

Eddy Grant, director of safety at Symphotech, who worked as the event's principal safety advisor, commented:

"This was a unique event, with a complex multi-agency operation, where effective communication and decision-making, working with experienced partners, ensured the safety of thousands of people – and the Liverpool football team. It was a long day that we reflected on with triumph, pride and a sprinkling of relief as the city returned for its normal Monday morning business."

CASE STUDY 2.9 UCI Mountain Bike World Cup 2017

The UK leg of the UCI Mountain Bike World Cup was held in Fort William, Scotland over three days in June 2017 (EventImpacts, 2017b). The event has been held annually in Fort William since 2002, generating some £37 million for the Highlands economy. The Fort William event was named as the best Downhill Mountain Bike event in 2017.

In 2017, the event attracted 336 participants and the involvement of 135 volunteers. It achieved media coverage by more than 250 print, digital and photo journalists from over 20 countries. Seventy-one per cent of the 17,286 spectators (10,040 unique spectators) felt encouraged to engage more often in cycling. Thirty-four per cent of the spectators were local and a further 37% were day visitors. The spectators attended for an

average of 1.9 days, while those staying overnight booked an average of 2.4 bednights. The average daily spend by those attending the event was £79 (excluding any accommodation costs). The event generated £3.7 million of direct economic impact for the Highlands economy. Mike Jardine from organisers Rare Management said:

"Over the last 16 years we've worked with our partners to establish the Fort William Mountain Bike World Cup's reputation as a world-class spectacle and event experience for all the family. The event brings elite riders, teams and spectators from all over the world to the Scottish Highlands, where they can enjoy a great experience and the legendary Fort William atmosphere."



2.9 Business Travel

2.9.1 Definition and Background

Business travel is integral to the smooth functioning of the events industry. Without a travel element, live events could not take place. Business travel describes the travel undertaken by individuals and groups to attend business meetings and events, and the business travel sector embraces travel industry suppliers including airlines, airports, accommodation companies, rail, car rental, technology, payment and ancillary product suppliers. The sector is served by specialist travel management companies (TMCs) who will normally be contracted by corporations to handle the booking and travel arrangements for their employees.

2.9.2 Characteristics and Trends

GTMC (now re-branded as BTA) research undertaken by Oxford Economics and published as 'The Value of International Business Travel' (GTMC, 2016) found that

business travel is more significant for some industry sectors than others – in general, service industries tend to be larger consumers of business travel than manufacturing. The research found that the top five sectors generating the most business travel activity in the UK were:

1. Financial service activities, except insurance and pension funding
2. Insurance and reinsurance, except compulsory social security and pension funding
3. Security and investigation activities
4. Advertising and market research
5. Creative, arts and entertainment activities

The same research found that, in volume terms, there is 'considerable overlap in the most popular markets for travel to and from the UK, from both air connectivity and international business travel perspectives – reflecting the interrelationship between tourism and business travel'. Table 2.8 shows

the most popular countries for business travel to and from the UK during the period 2006-2014.

2.9.3 Advantage Travel Partnership Research into Business Travel

Research published by Advantage Travel Partnership, the UK's largest independent travel agent and travel management company consortium, in its Hotels Quarterly Market Report covering the period January-December 2018, suggests that business travel may be on the rise despite concerns over Brexit (Wood, 2019). The report analyses data from corporate hotel bookings made between January and December 2018 by Advantage's TMC members, who represent around 40% of the UK business travel sector, highlighting business travel trends and booking behaviour.

The report shows that UK regional capitals are performing strongly, with overall room nights booked growing 8% across the top 250 UK cities/towns.

Table 2.8 Highest volume countries for UK business travel, 2006-2014

Rank	Air connectivity	Total business travel	Inbound business travel only	Outbound business travel only
1	United States	France	France	Germany
2	Spain	Germany	Germany	France
3	Netherlands	United States	United States	United States
4	Germany	Ireland	Ireland	Netherlands
5	France	Netherlands	Netherlands	Ireland
6	United Arab Emirates	Spain	Belgium	Poland
7	Ireland	Belgium	Spain	Spain
8	Italy	Italy	Italy	Italy
9	Switzerland	Poland	Switzerland	Belgium
10	Hong Kong	Switzerland	Denmark	Switzerland

Source: ONS, Oxford Economics analysis

London continues to be business travellers' favourite capital for work trips, with 663,000 room nights booked in 2018, an increase of 5% compared with 2017. But Edinburgh experienced the highest level of growth in 2018, with room nights booked increasing by 16%. Room nights booked in Belfast increased by 13% and, in Cardiff, by 5%.

The Advantage report also shows that, on a global level, the business world continues to travel widely and hotel demand remains strong in many international cities, with New York, Auckland, Wellington, Houston, Paris and Sydney topping the Advantage Top Cities list. In total, worldwide volume grew by over 393,000 room nights, a total increase of 8.74% compared with 2017, indicating that SME (Small and Medium Enterprise) corporate accounts, in which Advantage TMCs specialise, continue to perform strongly.

The total number of bookings made by Advantage business travel members in 2018 saw similar growth – up 8.76% – while the average length of stay remained constant at 1.87 nights. Increased demand and higher

occupancy globally meant hotel rates increased by US\$2 to an average daily rate (ADR) of US\$169.41.

2.9.4 'State of Long-Term Business Travel'

Research published as the 'State of Long-Term Business Travel' by Homelike, a tech start-up specialising in accommodation booking, and based on a survey of 2,000 business travellers in the UK, Germany, France and Spain, examined the evolving business trip, how much money business travellers spend abroad and how travel is being influenced by current socio-economic trends such as Brexit and volatile global economies (Colston, 2019).

The report found that European business travellers make a significant contribution to the local economies they visit, a figure put at an average of €504 per week and worth an estimated €103.4 billion per year spending in shops, cafes, restaurants, bars and gyms. Europe's biggest spenders are the French who spend an average of €634.2 per person per week when travelling for business.

More generally, whether they are

travelling short or long-term, European business travellers all enjoy experiencing local cultures when they are working abroad and are increasingly looking to stay in a 'home away from home' when away, with over a third (35.5 per cent) now preferring to stay in a furnished apartment over a hotel.

The majority of Europeans (49 per cent), and British travellers in particular (51 per cent), also prefer to travel for longer periods, staying in one location. This is largely because people find long-term travel less stressful than jetting around frequently.

Other key findings from the research include:

- The average European business trip is 2-6 days
- Despite environmental concerns, the plane remains the most popular travel medium in Europe, favoured by 62.25 per cent of travellers.

2.9.5 Corporate Travel Buyer Research by the 'Business Travel Show'

The number of corporate travel buyers forecasting bigger budgets for 2020 is at a five-year high, according to annual research conducted by the 'Business Travel Show' (Business Travel Show, 2020). 114 European travel buyers took part in the Business Travel Show poll, 56% from the UK, 35% from continental Europe and 9% from the rest of the world. 61% of the buyers who participated in the research control budgets in excess of £1 million.

Key findings from the research show that:

- 41% of buyers polled said their budgets would be higher in 2020, compared with 33% in 2019
- 45% of buyers will have more

to spend on accommodation in 2020 – an increase of 16% on 2019

- 65% of buyers are expecting to book more room nights, compared to 40% a year ago
- 41% will have bigger airline budgets, an increase of 10% over 2019
- 52% of buyers are expecting to manage more trips in 2020
- However, the volume of buyers (49%) predicting an increase in travel costs was also at a record high.

2.9.6 Inbound Business Travel – International Passenger Survey

The International Passenger Survey reveals that, in 2018, nearly a quarter (22.2%) of inbound visits to the UK were business trips, although this figure represents a fall of 4% compared with 2017 (VisitBritain, 2019). Table 2.9 shows the breakdown of visits to the UK from overseas, covering those visiting for holidays, for visits to friends and

Table 2.9 Inbound visits to the UK in 2018

Journey Purpose	2018 Visits (millions)	% change versus 2017	Year to Date 2018 Spend (£bn)	% change versus 2017
Holiday	15.1	-2%	£10.4	-3%
VFR	11.8	-2%	£5.7	-3%
Business	8.4	-4%	£4.5	-15%
Miscellaneous	2.6	-16%	£2.3	-14%

Source: International Passenger Survey – VisitBritain

relatives (VFR), for business, and for miscellaneous purposes.

2018 was the second consecutive year of decline in inbound business visits. Prior to the declines starting in 2017, business visits had generally been in steady recovery since 2009 with records being set in 2016.

2.9.7 All-Party Parliamentary Group for Business Travel

The trade association representing the business travel sector is the BTA (Business Travel Association – <https://www.thebta.org.uk>), until

July 2019 known as the GTMC. In announcing its rebranding, the BTA also confirmed that there will be an upcoming launch in Westminster of an All-Party Parliamentary Group (APPG) dedicated exclusively to business travel (BTA, 2019). The APPG's strategic ambition will be to better promote the importance of business travel.

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CHAPTER 3

THE GLOBAL COMPETITIVE LANDSCAPE

3.1 Introduction

Television news items featuring the competition between cities across the world to host major sporting events such as the Olympic Games and the Football World Cup have familiarised us with the notion that success in bidding to stage these events can only be achieved through lengthy, sustained, expensive, and high-profile activity. Images of bidding teams assembling weighty bid documents and support materials, often running to hundreds of pages, reinforce the notion that an enormous amount of research, hard work and professionalism are needed to stand any chance of success. Scenes of elation on the part of the successful bid teams are balanced by the desolation of those who are unsuccessful, their disappointment the only fruit of what may have been a bid campaign lasting years rather than weeks or months. Fortunately, there are relatively few events

demanding this scale of bid activity, although the principles underlying such activity are equally applicable to bids for whatever size of event.

It is undeniably the case that we live in a global marketplace and competition from other destinations, both cities and countries, grows continually fiercer. Chapter 7 in this report describes some substantial investments in the UK's physical product designed to attract major events to these shores, but also highlights a number of issues and challenges we face to ensure that our infrastructure for events is as good as it can possibly be. Other parts of this report describe additional forms of investment (in education and training and skills development, marketing, innovation and creativity, for example) being made to strengthen and secure the UK's 'offer' in this highly competitive, dynamic international industry.

A BVEP paper *Opportunities for Growth in the UK Events Industry: Roles and Responsibilities* (BVEP, 2011) states that:

'The UK is considered generally to be an expensive destination with a fragmented convention industry but we should seek to build on the key strengths that are inherent in the UK events industry. These include geographic location, quality and variety of venues with exceptional green credentials, the English language and Britain's strong science and medicine pedigree.'

These strengths are undoubtedly just as relevant and applicable in 2020 but to them we could perhaps add: creative event management skills, a high level of government support for the events sector, world-leading technology companies, and a cohesive approach to marketing the UK as a destination for global events.

This chapter looks at the nature of global competition and provides details of the UK's rankings in terms of its conference and exhibition performance, as well as its competitiveness in the related fields of travel and tourism.

3.2 The Nature of Global Competition

Competition from other countries and destinations can take many forms, from higher marketing budgets to greater levels of infrastructure investment, from more client-friendly policies and laws to a more professional and better supported approach to event bidding. A few examples help to put the scale and nature of the global competition for events business into context:

- In spring 2018 Tourism Australia announced the creation of an AU\$12 million national Business Events Bid fund to attract more international business events to the country, where the top three industries for attracting such events were shown to be Health Care and Social Assistance (33.5%), Professional, Scientific and Social Assistance (18.3%), and Financial and Insurance Services (6.9%) (Tourism Australia, 2018). In the spring 2019 Tourism Australia reported that its Business Events Bid Fund Programme had helped to double the value of business events secured by the country over the past three months to a new milestone of AU\$187 million
- Business Events Canada is focused on attracting conference events from across the key economic sectors in which Canada excels (Business Events Canada, 2018). By focusing on the whole ecosystem, aligning Canada's key economic drivers, academia, vibrant destinations and conference infrastructure, Business Events Canada offers conference organisers access to Canadian innovators and thought-leaders to augment meeting agendas. "Having a sound strategy is crucial to elevate Canada's reputation in an ever-evolving and competitive environment," said Chantal Sturk-Nadeau, executive director of Business Events Canada. "With that in mind, we've aligned our marketing strategy to Canada's global trade priorities, and are focusing on key priority sectors where Canada holds a competitive advantage."
- In 2019 the South Korean capital, Seoul, announced new meetings and incentives packages, with the aim of attracting more international delegates (Seoul, 2019). PLUS SEOUL will include a range of expanded options to customise locally-hosted events with more personal branding and experiences. The added incentives reflect Seoul's strong government-level commitment to boosting the city's meetings industry, in response to increased overseas demand. The customizable features of PLUS SEOUL include company-branded cakes and cookies for events with 50-199 participants, team-building programmes and entertainment for 200-499 participants, event branding on buses and photo mosaic walls for 500-999 participants, and event videos and on-site Korean cosmetic booths for 1000 or more participants. These features all come on top of core PLUS SEOUL benefits for corporate meetings and incentives, including financial, promotional and operational support based on event size and scope
- In 2014 Dubai founded the Dubai Association Centre (DAC) as a partnership between Dubai World Trade Centre, the Dubai Chamber of Commerce and Dubai Tourism, designed to target association business to Dubai (Dubai, 2019). The DAC's remit is to establish non-profit and non-religious professional associations and bodies in the Emirate of Dubai. The DAC is able to help with registration and licensing, facility management and organising meetings and events. By May 2019 60 associations worldwide had opened 'satellite' offices in DAC's office space, securing a Middle East base to expand within industries across the region and beyond. DAC's main objective is to grow Dubai and the UAE as a knowledge hub across key sectors. DAC is a platform for professional and trade associations, and the primary target associations are those operating within Dubai's high-priority sectors such as healthcare, construction, financial services, technology, tourism, trade and manufacturing
- Denmark's four leading meetings destinations (VisitAalborg, VisitAarhus, Inspiring Denmark and Wonderful Copenhagen) have banded together to launch a new programme designed to make international conventions more impactful for both associations and destinations (Denmark, 2019). The Danish destinations, gathered together in the alliance MeetDenmark, have launched a new Outreach Lab, which will bring relevant public and private local actors together with the association/meeting planner to identify, develop, and act on common goals for the association and the destination. At outreach

labs, focus can be on mission and identification of drivers that can increase the impact for both association and the local stakeholders. It can also be promotion/exposure and corporate/community outreach, government relationship building, etc. Concrete activities that may be relevant to promote common goals could, for example, be local attendance promotion, sponsor development, technical tours, research matching, ancillary events coordination, engaging local business, jobs fair coordination, network clinics, business matching service, government meetings, media support, community event coordination. Bettina Reventlow-Mourier, Deputy Convention Director and Head of Congress for Wonderful Copenhagen, said the goal is to build a new world-leading model for outreach: “We want to create a significant value-add for the international association coming to Denmark. We are focused on helping associations achieve greater impacts in fulfilling their own goals and missions while also strengthening the value of visiting congresses for Danish society beyond the traditional direct economic benefits. We’re looking to develop a powerful nexus between community goals and association goals.”

- International conference, exhibition, incentive and event delegates from 53 countries visiting St Petersburg are now able to arrange fee-free e-visas for visits of up to 8 days (this facility was already available to 34 other countries) (St Petersburg, 2019). Visitors to Russia’s cultural capital can complete an online process on the website of the consular department of the

Russian Foreign Ministry to apply for an eight-day visa. The application can be made no later than four and no earlier than 20 days before the expected date of entry. This new initiative follows similar schemes previously introduced for travel to Kaliningrad and the Kaliningrad Region as well as Vladivostok and airports across the whole of Russia’s Far Eastern Federal District. It is anticipated that this service will significantly improve the city’s accessibility and appeal for international association congresses as well as corporate events

- The global nature and growth of the international conference and events sector is well demonstrated by the evolution of one of the industry’s major trade shows, IMEX (IMEX, 2019). The first IMEX in Frankfurt was held in 2003 and, in that year, 119 countries were represented as exhibitors. Fast forward 16 years and IMEX in Frankfurt, taking place each spring, has grown enormously. The 2019 edition welcomed 3,439 exhibiting companies from 172 countries and 7,793 visitors in total including 3,817 hosted buyers from 83 countries. IMEX America, which celebrates its 10th birthday in 2020, has gone from strength to strength. At the 2019 show, held in the autumn in Las Vegas, there was a total of 4,226 buyers including 3,426 hosted buyers from 68 countries. There was an increase in exhibitors across the board including suppliers from hotels, the USA and Canada, Europe, Asia Pacific, the Middle East and the technology sector - totalling over 3,500 exhibiting companies.

3.3 UIA and ICCA Country and City Rankings 2018

The UK has enjoyed significant success in attracting major sporting events, described further in other parts of this Report, but comparative data is not available to show how successful the UK has been in securing events against international competition for many of the other individual segments of business visits and events. There is, however, well established research into the staging of international association and international governmental conventions and conferences, published annually by the Union of International Associations (UIA) and the International Congress & Convention Association (ICCA). While the UK has different rankings in the two datasets for 2018 (different criteria are used – see below), both suggest that there is still ‘room for improvement’. Recommendations for achieving such improvements are listed in other chapters of this report.

3.3.1 UIA Rankings

The latest Union of International Associations’ (UIA) rankings were published in its ‘60th International Meetings Statistics Report’ (UIA, 2019). The report summarises some important trends for the international association meetings market, representing 167 countries and 1,197 cities:

- Meeting numbers have been relatively stable at around 12,000 annually
- There is a significant growth in the number of meetings with under 500 participants
- The number of meetings with a concurrent exhibition has risen
- While Europe remains the preeminent world region for staging international association meetings, Asia’s market share is growing significantly
- In 2009, 2010, and 2014 there were over two association

meetings per million global inhabitants

- Meetings have become shorter in duration

The UIA report provides rankings by country and by city for three different categories of international meeting, but the rankings shown below are based on its 'A' heading, covering meetings organised or sponsored by 'international organisations' i.e. international non-governmental organisations (NGOs) and intergovernmental organisations (IGOs) included in the *UIA's Yearbook of International Organizations*, with at least 50 participants, or number of participants unknown. Table 3.1 shows the top ten countries and cities in 2018 and the number of international meetings staged.

3.3.2 ICCA Country and City Rankings 2018

The International Congress & Convention Association (ICCA) rankings 2019 cover meetings organised by international associations which take place on a regular basis, attract a minimum of 50 participants and rotate between a minimum of three countries (ICCA, 2019). ICCA identified 12,937 rotating meetings taking place in 2018, representing an increase of 379 meetings compared to the number recorded at the same time in 2017. It is the highest annual figure that ICCA has ever recorded in its yearly statistics. Table 3.2 shows the rankings of the top cities and countries.

3.4 The Global Exhibitions Marketplace

3.4.1 UFI Global Exhibition Barometer

In respect of research into the global exhibitions market, UFI (The Global Association of the Exhibition Industry) publishes an annual 'Global Exhibition Barometer', the 23rd edition of which was published in July 2019 (UFI, 2019). While this

Table 3.1 Top International Meeting Countries and Cities in 2018 – UIA

Number of meetings per country			Number of meetings per city		
Ranking	Country	Number of meetings	Ranking	City	Number of meetings
1	Singapore	1,177	1	Singapore	1,177
2	Republic of Korea	854	2	Brussels	733
3	Belgium	849	3	Seoul	431
4	USA	592	4	Vienna	401
5	Japan	579	5	Tokyo	313
6	Austria	472	6	Paris	259
7	France	455	7	Madrid	190
8	Spain	441	8	London	183
9	United Kingdom	329	9	Barcelona	148
10	Germany	296	10	Geneva	145

Source: Union of International Associations

Table 3.2 ICCA country and city rankings measured by number of meetings organised in 2018

Number of meetings per country			Number of meetings per city		
Ranking	Country	Number of meetings	Ranking	City	Number of meetings
1	USA	947	1	Paris	212
2	Germany	642	2	Vienna	172
3	Spain	595	3	Madrid	165
4	France	579	4	Barcelona	163
5	United Kingdom	574	5	Berlin	162
6	Italy	522	6	Lisbon	152
7	Japan	492	7	London	150
8	China – P.R.	449	8	Singapore	145
9	Netherlands	355	9	Prague	136
10	Canada	315	10	Bangkok	135
11	Portugal	306	11	Buenos Aires	133
12	Republic of Korea	273	12	Hong Kong	129
13	Australia	265	13=	Amsterdam	123
14	Sweden	257	13=	Tokyo	123
15	Belgium	252	15	Seoul	122
16	Austria	240	16	Copenhagen	120
17	Brazil	233	17	Brussels	112
18	Argentina	232	18	Dublin	104
19	Poland	211	19	Stockholm	103
20	Switzerland	208	20=	Budapest	100
			20=	Tapei	100

Source: Union of International Associations

CASE STUDY 3.1 Germany. Expertise. – tap into local expertise and sector know-how to build better business events

The following article was written by Matthias Schultze, Director of the German Convention Bureau, and is reproduced with permission.

Providing environments that resonate with your attendees' industry and business focus is key for engaging experiences

How do conference planners choose destinations? Why do they go for one country or city and not the other? The parameters influencing this choice are complex and intertwining. Topic, target group, competitive situation and not least budget are just a few factors to mention here. However, if I had to name one element that is taking on increasing importance in the decision-making process, I would go for relevant industry expertise at your chosen destination that enriches the experience attendees have. As we know from our research, 74% of event planners say that access to relevant know-how is important when choosing a destination – and here's why.

Attendees look for events that make a difference

With the digital transformation marching on in recent years, we have seen the meeting and event sector undergoing tremendous change. How we meet, why we meet, how suppliers market their service, all these things are in flux. They transform and evolve. One key factor in this environment that no-one within the meeting and event community can afford to ignore any longer is the growing importance of the attendee experience. The latest results of the 'Future Meeting Space' research that the German Convention Bureau undertakes with a variety of industry partners make it very clear that how you engage attendees is vital for the success of business events – and this means creating experiences that really make a difference for the people attending and add value for them.

Meetings and conferences as connectors to business hubs and industry expertise

Association meetings, corporate events or product launches are all occasions where people come together to connect, network and, most importantly, learn. Knowledge transfer is one of the most important reasons for people to attend meetings, congresses and other business events and the importance of local expertise in key sectors is evident in this context. Destinations where meetings can be integrated in, and tap into, an existing

pool of business leaders, scientists, engineers, academics and experts can add another level of know-how provision to your agenda.

Connecting your attendees with industry communities in a destination means people can be inspired and learn. Be it site visits, get-togethers, speakers or other elements – if the quality of your event's surrounding resonates with attendees, their work, expertise and business challenges, you can offer more opportunities for learning, sharing knowledge, creating connections and, ultimately, provide a better experience.

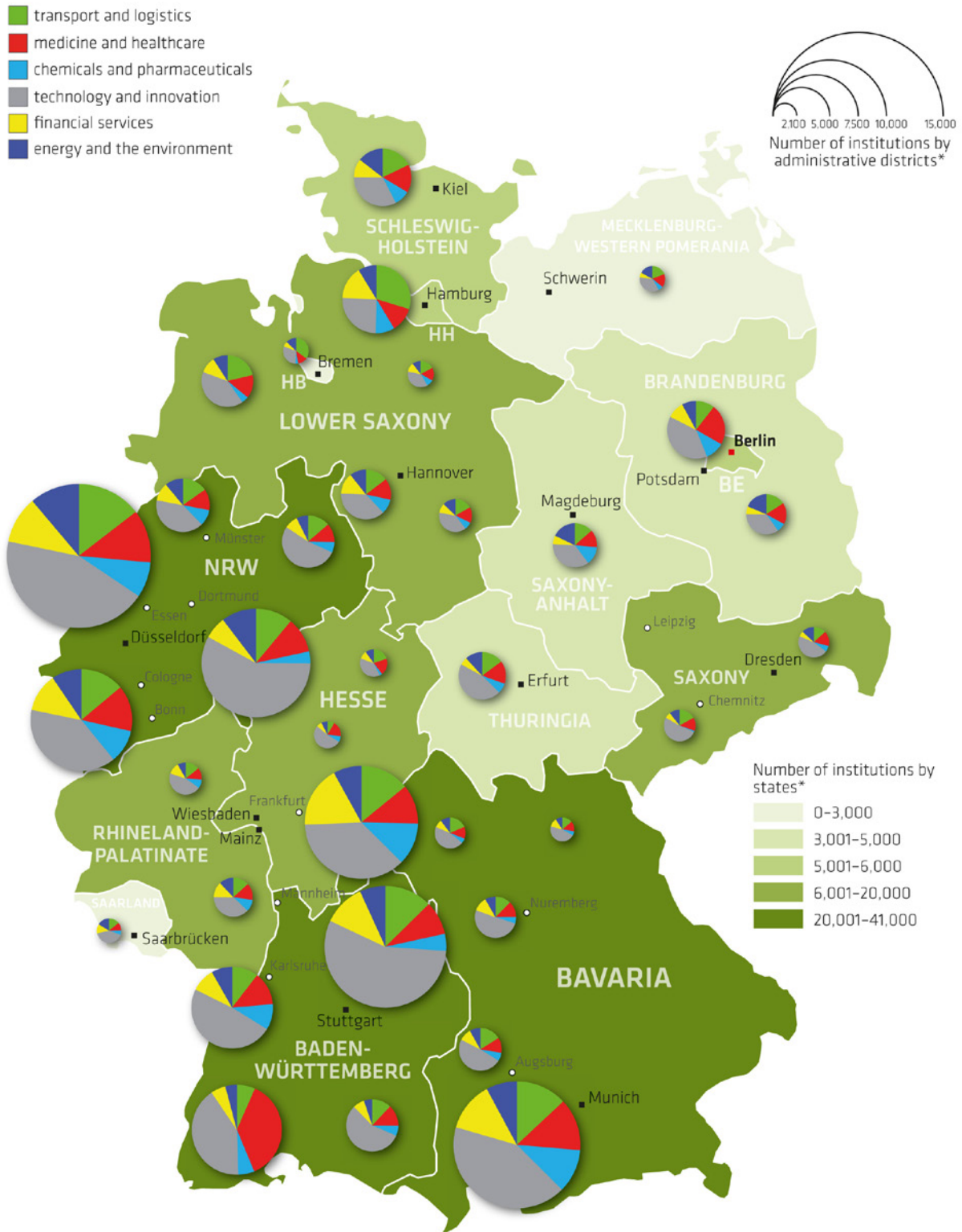
Germany using expertise in key sectors to provide tailor-made experiences

In Germany, for example, we look at six key sectors (see Figure 3.1) in which the country plays a major role as a global leader and agenda setter to tailor meetings and events to the needs of event planners in different industries. From technology and innovation to healthcare, the environment or transport and logistics, the fact that the country can offer these hubs of expertise for organisers to use and connect with is an important element that has contributed to establishing Germany in the group of top international destinations for meetings and events. The very specific German decentralised landscape of commercial and scientific clusters that cover the whole country and that also unlock smaller cities as destinations for business events provides conference planners with valuable resources and flexibility to be creative in their approach to design experiences that really connect attendees with the place, rather than just sit in a room that could be anywhere in the world.

Numerous conversations with a wide variety of event professionals at the recent IMEX exhibition in Frankfurt also confirm my belief that the focus on putting meetings and conferences in context with local expertise is vital for our industry's future development. Meetings and conferences are, essentially, about bringing people and their know-how together. Meeting planners should, therefore, make use of the connecting powers destinations can provide to ensure that attendees get the most out of their experience – including unique insights into local expertise that will make your event stand out.

For more information about Germany. Expertise. visit: <https://www.gcb.de/discover-germany/discover-german-expertise.html>

Figure 3.1 Page illustration from the Germany. Expertise. brochure



* Weighted according to the revenue classes of the companies or facilities; supplemented by quantitative factors regarding research & teaching, administration and trade associations

CASE STUDY 3.2 Melbourne Convention Bureau Performance 2018-19

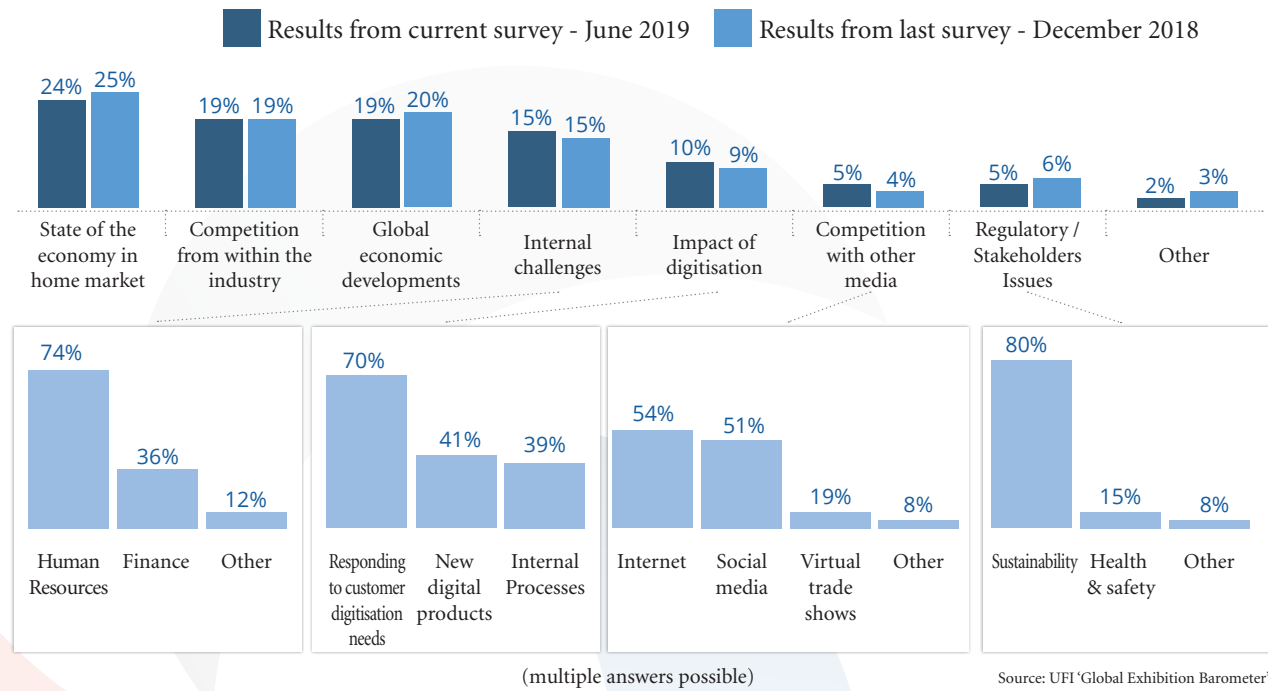
Melbourne Convention Bureau achieved record financial results in 2018-19, with business events generating AU\$507 million (Melbourne Convention Bureau, 2019). Figures show that business events have become the highest-yielding sector in the Australian state of Victoria's visitor economy, with a 28% increase in economic contribution compared to the previous year.

The revenues were generated by 299 events, which are estimated to have attracted more than 136,000 new visitors to Victoria and over 226,000 room nights. The record-breaking year can be attributed to years of work

in bidding for events, resulting in several significant wins, including the 2023 Rotary International Conference, the most valuable conference ever won for the state. The event is expected to attract 20,000 Rotary members from over 200 countries and regions worldwide, injecting over AU\$110 million into the Victoria economy.

Other notable conferences include The International Convention of Jehovah's Witnesses 2019, International Congress of Genetics 2023, 20th International Union of Basic and Clinical Pharmacology, and the World Congress of Philosophy 2023.

Figure 3.2 Impacts and Issues Facing the Global Exhibition Industry



research does not provide rankings by country or city showing the most successful players, it does identify key issues affecting the exhibitions marketplace. As with previous surveys, the clear majority of responses from exhibition organisers around the world related to the following four issues:

- The state of the economy in the home market
- Competition from within the Industry
- Global economic developments
- Internal challenges

Figure 3.2 provides a more detailed analysis of the key impacts and issues facing the global exhibition industry, and how these may have changed in the six months since the previous survey.

The same survey examines the financial performance of the UK's and other countries' exhibition organisers, with year-on-year comparisons and also a forecast for business expectations in 2020. It shows an encouraging picture in terms of the companies' turnover, with approximately 90 per cent of

UK respondents anticipating higher turnover in 2019 and 2020, and some 55 per cent predicting an increase in profits of more than 10 per cent for 2019. Figure 3.3 gives more detail of the financial performance of UK exhibition companies.

3.4.2 AUMA Study on Exhibition Company Revenues

In September 2019, AUMA, the Association of the German Trade Fair Industry, published the results of a study into the revenues of exhibition companies globally (AUMA, 2019).

The study is based on reported revenues (in 2018) from companies that solely operate as exhibition organisers, venues, or companies active in both fields. The study reveals that seven of the world's top 15 exhibition companies are based in Germany, with combined revenues of approximately €4 billion in 2018. However, two UK companies top the rankings, with turnover significantly higher than any of their competitors. Of the 34 exhibition companies which have revenue totalling more than €100 million, nine are based in Germany and eight in the UK. Companies from Europe dominate this ranking overall, with only four of the 34 companies based outside Europe. Table 3.3 provides a detailed breakdown of the AUMA research and rankings.

3.5 Travel and Tourism Competitiveness

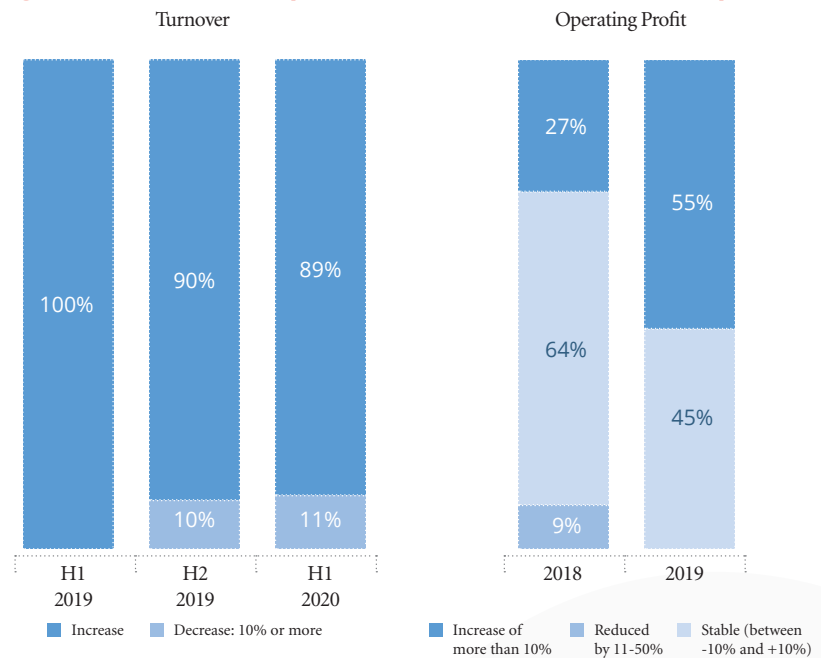
Within the related fields of travel and tourism, the World Economic Forum's 'Travel & Tourism Competitiveness Report 2019' positions the UK in sixth place out of 140 countries in its competitiveness index, measuring the set of factors and policies that enable the sustainable development of the travel and tourism sector, which contributes to the development and competitiveness of a country (World Economic Forum, 2019). The framework for the index, covering the factors and policies being assessed, is set out in Figure 3.5.

The top ten countries in the World Economic Forum travel and tourism competitiveness index are:

1. Spain
2. France
3. Germany
4. Japan
5. United States
6. United Kingdom
7. Australia
8. Italy
9. Canada
10. Switzerland

The UK has slipped one place from the previous 2017 index when it occupied fifth place.

Figure 3.3 Financial Expectations of UK Exhibition Companies



Source: UFI 'Global Exhibition Barometer'

Table 3.3 Revenue of Exhibition Companies Worldwide

Revenue of Exhibition Companies Worldwide (more than Euro 100 million)			
Company	2018(€)	2017 (€)	2016 (€)
1. Reed Exhibitions (GB)	1,351.9	1,264.0	1,277.4
2. Informa (GB)	1,318.9	631.1	358.3
3. Messe Frankfurt (Germany)	718.1	669.1	647.0
4. GL Events (France)	477.0	481.9	452.6
5. MCH Group (Switzerland)	463.9	421.8	410.0
6. Messe Munchen (Germany)	417.9	332.6	428.1
7. UBM plc (GB)	415.8	979.0	830.6
8. Comexposium (France)	366.0	264.0	277.0
9. Messe Berlin (Germany)	352.1	284.0	309.4
10. Koelnmesse (Germany)	337.4	357.9	274.0
11. Emerald Expositions (USA)	332.6	285.2	305.9
12. NürnbergMesse (Germany)	315.1	205.5	288.0
13. Deutsche Messe (Germany)	309.7	356.4	302.3
14. Messe Düsseldorf (Germany)	294.0	367.0	442.8
15. Fiera Milano (Italy)	247.2	271.3	221.0
16. PSPA TOPCO Limited (Clarion Events)(GB)	242.3	171.1	182.8
17. HKTDC (Hong Kong)	240.0	254.1	237.6

Source: AUMA Study 2019'

CASE STUDY 3.3 Shenzhen World Exhibition & Convention Center

In late 2019 China opened Phase 1 of what will become the largest exhibition venue in the world. The new Shenzhen World complex is located just across the border from Hong Kong and is a truly breathtaking achievement of planning and engineering.

With Shenzhen transforming itself in recent decades from a small fishing town of 30,000 people to a 19 million population super city that boasts a GDP third only in China to Beijing and Shanghai, the Shenzhen World Exhibition and Convention Center is set to be the main platform for the industries of the Pearl River Delta to showcase their products to the world.

Specific features of the complex will include:

- Phase 1 will deliver 400,000m² of purpose-built indoor exhibition space
- Phase 2 will add a further 100,000m²
- The venue is designed with an organising spine to connect 19 halls arranged symmetrically along a central corridor
- There are two main registration lobbies (each of 6,000m²) directly connected to the subway, two VIP entrances to the west, plus the grand South Entrance

Figure 3.4 Shenzhen World



- A two-level central corridor moves visitors efficiently from North to South
- Shenzhen World is 3 kilometres from Shenzhen Airport and 75 kilometres from Hong Kong Airport
- The venue is served by two metro stations

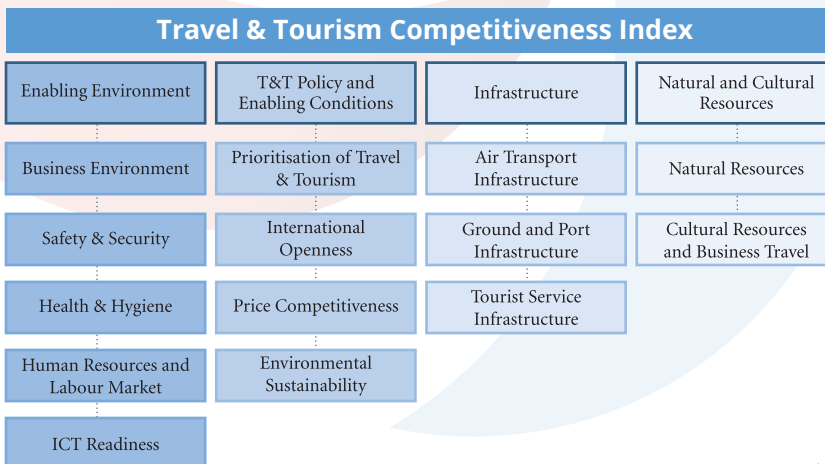
With a fishbone style roof running the length of the 1.75 kilometres' construction, the project is striking to say the least. Exhibition industry consultants JWC have ensured a very high specification all through, and there are to be four hotels on site when Phase 2 is complete.

High-tech is not only embedded in the venue building but expected to power business with high-tech enterprises such as Huawei, Tencent and DJI based in the city.

This case study is based on an article by Paul Colston entitled 'Shenzhen World: a big leap into China's future' that appeared in 'Exhibition World' magazine (Issue 5, 2019).

Figure 3.5 Framework for the Travel & Tourism Competitiveness Index

The T&T Competitiveness Index 2019 Framework



Source: World Economic Forum

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CHAPTER 4

HOW EVENTS DELIVER ON THE UK'S INDUSTRIAL STRATEGY

4.1 Introduction

In recent years the government has demonstrated its increasing support for the events sector. In 2015 it published its first Business Visits and Events Strategy (DCMS, 2015), one of the key commitments of which was to create an Events Industry Board to work with government on fulfilling objectives within the strategy. The Events Industry Board held its first meeting in January 2016 and continues to provide Ministers and Officials with guidance and feedback on how Britain may become a more competitive environment in order to attract, grow and create international events (Chapter 10 of this report gives more details of the work of the Board).

In June 2019 the government published its 'International Business Events Action Plan' (DCMS, 2019a),

key points from which are set out in this chapter.

This activity has taken place against the backdrop of a new Industrial Strategy for the UK, published by the government in 2017, and the five main themes or 'foundations' of this strategy are detailed in section 4.2 below (BEIS, 2017). The strategy has led to the creation of a number of Sector Deals for important sectors of the national economy, including one for the Tourism Sector with its close links to events. The Tourism Sector deal, published in June 2019, is also summarised in the chapter.

4.2 The Government's Industrial Strategy: the 5 foundations

In 2017 the government published its Industrial Strategy (BEIS, 2017). In introducing the strategy, the

government said that, while the UK has significant economic strengths which can be built upon, more needs to be done to increase productivity and make the most of the untapped potential right across the country. It undertook to boost productivity and earning power across the country by focusing on the 5 foundations of productivity. The 5 foundations support the government's vision of a transformed economy and they are:

1. Ideas
2. People
3. Infrastructure
4. Business environment
5. Places

The following provides a summary of how the government plans to implement its Industrial Strategy based around these 5 foundations.

4.2.1 Ideas – to be the world’s most innovative economy

The Industrial Strategy states that our ability to innovate – to develop new ideas and deploy them – is one of Britain’s great historic strengths, from the jet engine and the bagless vacuum cleaner to MRI scanners and the world wide web. We are a global leader in science and research: top in measures of research excellence and home to four of the top 10 universities in the world.

We need to do more to ensure our excellence in discovery translates into its application in industrial and commercial practices, and so into productivity. The government and the private sector need to invest more in research and development (R&D). We need to be better at turning exciting ideas into strong commercial products and services. And we must do more to grow innovation strengths in every part of the UK, as well as maintaining our position as a global leader in science and innovation

Through our Industrial Strategy, Britain will take a leading role in a new industrial revolution as significant as the last. We will drive change through the biggest increase in public investment in R&D in our history. We will ensure the UK is the best place for innovators and, through our Grand Challenges (these cover: Artificial Intelligence and Data, Clean Growth, Future of Mobility, Ageing Society and more details are accessible at: <https://www.gov.uk/government/publications/industrial-strategy-the-grand-challenges/industrial-strategy-the-grand-challenges>), we will drive partnerships between the best minds in science and business throughout Britain.

Key Policies

- Raising total research and development (R&D) investment to 2.4% of GDP by 2027
- Increasing the rate of R&D tax credit to 12%
- Investing £725 million in new Industrial Strategy Challenge Fund programmes to capture the value of innovation

4.2.2 People – to generate good jobs and greater earning power for all

The United Kingdom has one of the most successful labour markets in the world. Our employment is at near historic high – one of the fastest post-recession rates relative to other major economies. It is underpinned by a world-class higher education system, the first choice of students and researchers around the world. Employers are ever more closely involved in the system, and we are committed to delivering three million apprenticeship starts by 2020.

But we still face challenges in meeting our business needs for talent, skills and labour. In the past, we have given insufficient attention to technical education. We do not have enough people skilled in science, technology, engineering and maths. We need to narrow disparities between communities in skills and education and remove barriers faced by workers from under-represented groups in realising their potential.

We will ensure that everyone can improve their skills throughout their lives, increasing their earning power and opportunities for better jobs. We will equip citizens for jobs shaped by next generation technology. As the economy adapts, we want everyone to access and enjoy good work. We

will put technical education on the same footing as our academic system, with apprenticeships and qualifications such as T levels. We will continue to support teaching in our schools, flexible career learning and other measures to transform people’s life chances.

Key Policies

- Establish a technical education system that rivals the best in the world, to stand alongside our world-class higher education system
- Invest an additional £406 million in maths, digital and technical education, helping to address the shortage of science, technology, engineering and maths (STEM) skills
- Create a new National Retraining Scheme that supports people to re-skill, beginning with a £64 million investment for digital and construction learning

4.2.3 Infrastructure – a major upgrade to the UK’s infrastructure

Infrastructure is the essential underpinning of our lives and work, and having modern and accessible infrastructure throughout the country is essential to our future growth and prosperity.

Much of this investment is, by its nature, large scale and long term, and one of the most significant ways the government can influence the economy – from our transport and housing through to the roll-out of digital networks. Our National Infrastructure and Construction Pipeline is worth around £600 billion and public infrastructure investment will have doubled in a decade by 2022-23.

We must make sure our infrastructure choices not only provide the basics for the economy, they must actively support our long-term productivity, providing greater certainty and clear strategic direction. Our investment decisions need to be more geographically balanced and include more local voices. We can improve how we link up people and markets to attract investment, and we must be more forward-looking in respect of significant global economic trends.

Through our Industrial Strategy, the country's economic geography will be transformed by a surge of infrastructure investment heralding a new technological era.

We will build a Britain that lives on the digital frontier, with full-fibre broadband, new 5G networks and smart technologies. We will create a new high-speed rail network that connects people to jobs and opportunities, regenerate our stations and airports, and progressively upgrade our road network. And we will improve people's lives where they live and work, with high quality housing and clean, affordable energy. Providing the right infrastructure in the right places boosts the earning power of people, communities and businesses.

Key Policies

- Increase the National Productivity Investment Fund to £31 billion, supporting investments in transport, housing and digital infrastructure
- Support electric vehicles through £400 million charging infrastructure investment and an extra £100 million to extend the plug-in car grant
- Boost our digital infrastructure

with over £1 billion of public investment, including £176 million for 5G and £200 million for local areas to encourage roll out of full-fibre networks.

4.2.4 Business Environment – to be the best place to start and grow a business

The United Kingdom has a global reputation as a good place to do business. A new business starts up every 75 seconds, and we are home to five of the top 10 fastest-growing businesses in Europe. People looking to grow or relocate a business come to Britain confident in our high corporate standards. The OECD ranks us as one of the best places to start and grow a business; we have the most competitive tax rates and we are welcoming to global talent and disruptive start-ups.

Our challenge is to improve how we spread the best practice of our most productive businesses. We are one of the world's great financial centres, yet growing businesses sometimes face difficulty in accessing finance.

Our managers are, on average, less proficient than many competitors, and we should make better connections between high-performing businesses and their supply chains.

Our Industrial Strategy aims to make Britain the best place to start and grow a business, and a global draw for innovators. We will drive productivity in businesses of all sizes by increasing collaboration, building skills and ensuring everyone has the opportunity of good work and high-paying jobs. We will ensure the financial sector is better connected to the rest of the economy, driving impactful investments. We will create a business environment equipped for

the challenges and opportunities of new technologies and ways of doing business.

Key Policies

- Launch and roll out Sector Deals – partnerships between government and industry aiming to increase sector productivity. The first Sector Deals are in life sciences, construction, artificial intelligence and the automotive sector
- Drive over £20 billion of investment in innovative and high potential businesses, including through establishing a new £2.5 billion Investment Fund, incubated in the British Business Bank
- A review of what actions could be most effective in improving productivity of SMEs, including how to address the 'long tail' of less productive businesses.

4.2.5 Places – to have prosperous communities across the UK

The United Kingdom has a rich heritage with world-leading businesses located around the country. Our cities, towns and rural areas have competitive advantages that will be essential to shaping our economic future.

Yet many places are not realising their full potential. The UK has greater disparities in regional productivity than other European countries. This affects people in their pay, their work opportunities and their life chances.

Every region in the UK has a role to play in boosting the national economy. We will build on the strong foundations of our city, growth and devolution deals and continue

to work in partnership with local leaders to drive productivity. We will introduce Local Industrial Strategies and further strengthen local leadership through Local Enterprise Partnerships and Mayoral Combined Authorities.

We will also introduce new policies to improve skills in all parts of the country, create more connected infrastructure, back innovation strengths, ensure land is available for housing growth, and strengthen our cultural assets.

We are working with our partners in the devolved administrations to deliver ambitious plans for communities across Scotland, Wales and Northern Ireland. We will also continue to build the Northern Powerhouse and Midlands Engine to help create prosperous communities throughout the UK.

Key Policies

- Agree Local Industrial Strategies that build on local strengths and deliver on economic opportunities
- Create a new Transforming Cities fund that will provide £1.7 billion for intra-city transport. This will fund projects that drive productivity by improving connections within city regions
- Provide £42 million to pilot a Teacher Development Premium. This will test the impact of a £1,000 budget for high-quality professional development for teachers working in areas that have fallen behind.

4.3 Tourism Sector Deal

The government's Industrial Strategy envisages the creation of Sector Deals as partnerships between government and industry aiming to increase

sector productivity. Ten Sector Deals have been launched to date and two of these, covering the Creative Industries and Tourism, have a direct bearing on the events sector. The Creative Industries Sector Deal is described more fully in Chapter 5 of this report while key points from the Tourism Sector Deal are summarised below (DCMS, 2019b).

The Tourism Sector Deal sets out how the government and industry will work in partnership to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer.

Key areas of focus include:

4.3.1 Increase in visitor numbers

In 2018 the UK attracted 38 million international visitors, who added £23 billion to the economy, making tourism one of the country's most important industries and the third largest service export. Current forecasts predict the sector will deliver a 23% increase in inbound visitors by 2025. Domestic tourism is also set to increase by an estimated 3% per annum until 2025. In 2018, British residents took 119 million overnight trips in the UK, totalling 372 million nights away and spending £24 billion.

The Deal seeks to develop the infrastructure necessary for this influx of visitors. It also creates a framework to position industry to take advantage of new markets as well as leveraging initiatives designed to deliver the Grand Challenges relating to the data-driven economy, clean growth and an ageing society.

With this predicted increase in visitors, there needs to be investment in the infrastructure to accommodate

and entertain them. 130,000 hotel rooms will be built over the next 5 years, representing the largest hotel investment anywhere in Europe. 75% of these new rooms will be outside the capital, supporting the government's intention that the benefits of tourism should be felt across the whole of the UK. Significant investment will also be made in attractions by the private and public sectors – including investment in both our natural and built heritage, museums and arts.

Investment will also be made in the people who work in the sector, so that the growth in visitor numbers can, in turn, create equivalent growth in well-paid employment opportunities. The industry will create 30,000 apprenticeship starts each year and a new mentoring scheme will help 10,000 employees develop their careers in the sector. This will complement a commitment by the government to ensure that our education system supports the industry's needs, including the roll-out of 2 new T level courses.

This will ensure that visitors to the UK are served by a highly knowledgeable and skilled workforce.

4.3.2 Productivity

Resources will also be better used as a result of this deal, as productivity in the sector is currently hampered by the over-reliance on the traditional July-September peak season. 38% of holidays by inbound visitors take place in these 3 months. This deal sets out how the UK will increase the number of off-season visitors via 2 major interventions. Firstly, the government will create up to 5 new Tourism Zones to support areas wishing to improve their tourism offer, particularly focusing on those areas looking to boost off-season visits.

Secondly, business events often drive inbound visits outside of the peak leisure season, and the UK government is launching an International Business Events Action Plan (see later in this chapter) in conjunction with the Sector Deal. This plan sets out how the UK will maintain its position as a leading nation for hosting business events in Europe and sets out clear steps to bring more major conferences and exhibitions to the UK.

4.3.3 Visitors of the future

In recent years, competition around the world has seen a race to build the best understanding of customers, both in how they travel, but also how they search, feel inspired and spend their money. It is no longer simply a case of looking backwards at trends to understand the future. To be globally competitive, we need real-time data and so we will develop a new Tourism Data Hub, which will help Britain make the most of its tourism offer by understanding the motivation and movement of its visitors. The Tourism Data Hub will be a ground-breaking new way of helping the sector to gain a better understanding of its potential market. The UK also has the ambition to become the most accessible tourism destination in Europe by 2025, increasing the number of international visitors by 33%.

4.4 The UK Government's Business Visits and Events Strategy

In 2015 the government published its 'Business Visits and Events Strategy' (DCMS, 2015), which outlined how the government would bring a more coordinated and targeted approach to supporting business events. It set up the Events Industry Board to advise government on the best way forward. It also created the GREAT

Business Events Growth Programme, which VisitBritain uses to provide financial support to destinations in attracting bids and growing international delegate numbers.

But the government has recognised that, as the UK leaves the European Union, there is an opportunity to take its support to the next level to remain competitive and make clear that the UK remains fully open for business.

4.5 The UK Government's International Business Events Action Plan - 2019-2025

In 2019 the government via the Department for Digital, Culture, Media and Sport published an Action Plan which sets out what further steps the government will take to create, attract, grow and retain international business events (DCMS, 2019a). The key points from this Action Plan are summarised below.



4.5.1 The UK Government's Vision for Business Events

The UK government's vision is for the UK to maintain its position as a leading European country for hosting business events, conferences and congresses. To do this, the government wants to help create new international business events, attract more existing events to the UK, grow our already successful events and

retain those that might be thinking about leaving.

Achieving this vision will help generate growth and prosperity through:

- a. The direct economic impact of international business visitors spending money during their stay
- b. Repeat visits from business visitors who decide to return to the UK at a later date with friends and families, or who extend their visit to spend time with their friends/families in the location
- c. Attracting key industry decision makers, academics and innovators to the UK
- d. Facilitating more dissemination of knowledge and research outputs and showcasing British products and services
- e. Increasing opportunities for exports and inward investment for UK businesses as well as for business to be conducted on an international scale
- f. Enhancing regional prosperity and sense of place by creating an approach that takes into account all the regions and nations of the UK.

The UK government has designed the Action Plan to complement the work of each Devolved Administration, where appropriate, and will continue to consult the Devolved Administrations on future work, where appropriate.

4.5.2 Developing the Strategy

In 2015, the Government published the 'Business Visits and Events Strategy' which outlined how the government intended to help grow the Business Events industry within the UK. The strategy recognised that, whilst the UK government provided discrete support to business events,

it had not done so on a strategic, overarching basis.

The Action Plan serves as an update to that strategy, by setting out in greater detail a concrete government offer of support to the Business Events industry. The Action Plan will be delivered by the UK government, led by the Department for Digital, Culture, Media and Sport and other relevant UK government departments. It will be supported by VisitBritain and the Events Industry Board and will continue to consult the Devolved Administrations, other UK government departments and wider industry, where appropriate.

4.5.3 What Events Will the UK Government Support?

The UK government has created a set of criteria for identifying existing business events that the government might support. It has produced separate criteria for **attracting** events to the UK, **growing** existing events and **creating** new ones. These are set out below. The UK government may decide to support events which do not meet the criteria on a case-by-case basis. For **retaining** events, the government will try and retain all those that are thinking of leaving.

Attracting Events to the UK

In order to be eligible for the government's support offer, an event should ideally:

- a. Draw at least 50% of delegates from overseas;
- b. Attract a minimum of 300 delegates;
- c. Not displace existing international events in the UK;
- d. Have potential opportunities to create fringe events in addition to the main event, so as to extend the length of time that delegates stay;

- e. Be one of the sectors identified by the Department for International Trade and the Department for Digital, Culture Media and Sport as key to the development of the Business Events industry. The current list of priority sectors for the UK government includes: Advanced Manufacturing, Aerospace, Automotive, BioEconomy, Consumer, Creative, Education, Energy, Engineering, Financial Services, Food and Drink, Health and Life Sciences, Infrastructure, Marine, Space, Sport, Smart Cities and Technology.
- f. Link closely to one or more of the four Grand Challenges identified in the Industrial Strategy (the Grand Challenges are: Artificial Intelligence and data; the ageing society; clean growth and the future of mobility)
- g. Have the ability to attract inward investment to UK businesses.

Events should also demonstrate the active involvement and support of local, national and regional partners including, but not limited to, destination management organisations, venues/conference centres, the Local Authority and/or other sub-regional economic delivery partner, and the Devolved Administrations where appropriate. Appropriate due diligence must be made on the event, to ensure the organisers are acting fairly and transparently.

The government is particularly keen on events which enhance the reputation or impact of UK academia, encourage knowledge sharing and bring key opinion leaders from their fields to the UK.

Growing Existing Events

While aiming to win existing events with a track record of success is a prudent approach, there are a finite number of events that can feasibly come to the UK each year due to capacity constraints and the fact that many events are not peripatetic and do not move from their chosen host destination once established. The UK government's support offer, therefore, will also apply to growing existing UK events in order to attract greater amounts of international businesses and delegates. This is where the Events Industry Board considers there are the biggest opportunities.

For growing events, the government will largely use the same criteria as for attracting events, although the 300 delegate minimum and 50% international targets will need to be realistic ambitions for the bidder rather than existing figures.

To optimise these opportunities a highly proactive approach will need to be adopted, identifying the existing events which meet the criteria and then approaching organisers to discuss ways of supporting them to grow. These could be domestic only events with the potential for attracting an international audience or international events held in Britain that can further grow their international profile.

Creating New Events

Key UK government objectives, such as those laid out in the Industrial Strategy, could be met or enhanced by the creation of new business events. The UK government will, therefore, work across government, with the Devolved Administrations and in partnership with other

public and private stakeholders, to support the creation of new business events. This includes government sponsored/organised events such as the International Business Festival or the Global Disability Summit.

Creating new events is, however, a significant investment for the UK government and each event would need to be considered against its own business case.

4.5.4 The UK Government's Support Offer

The UK government's support offer to business events which meet the criteria outlined above is based on findings from existing research and extensive stakeholder engagement by the government and the Events Industry Board. The exact mix of support on offer will vary depending on the specific needs of the event. Support with visas, for example, will not be needed for events where delegates come from countries that do not need visas for entry into the UK. The offer is split into six different types of support:

1. Government Advocacy
2. Financial Support
3. Destination Marketing
4. Arrivals and Welcome
5. Capacity and Connectivity
6. Government Coordination.

4.5.4.1 UK Government Advocacy

A 2011 report on Subvention Practices identifies government advocacy as one of the ways in which the UK could increase its success in bidding for international events, especially when the overall offers are similar (BVEP, 2011). Advocacy is seen by many decision makers as an indication of the commitment of the relevant government to supporting the delivery of their

event. Developing a more systematic approach to government advocacy and political support could secure more major events. Advocacy support can be given at all stages of an event's life cycle - from bidding to hosting.

What we will do

For events that meet the criteria, the Department for Digital, Culture, Media and Sport, working with VisitBritain and, where appropriate, with Devolved Administrations and regional bodies, will offer:

- Ministerial letters or videos of support to accompany bids or to welcome organisers to the UK
- Ministers or senior officials attending site visits
- Where appropriate, Ministers or senior officials speaking at, or attending, events
- Assistance with bringing in influential speakers to events; and,
- Hosting delegations where appropriate, including in historical government buildings, and using government-owned property for receptions/meetings/dinners where appropriate and possible.

The Department for Digital, Culture, Media and Sport will work with the Foreign and Commonwealth Office, as well as VisitBritain's overseas offices and the British Council, to assess what use can be made of the UK's overseas network in enhancing the advocacy offer.

VisitBritain and the Department for Digital, Culture, Media and Sport will assess, on an ongoing basis, the impact of government advocacy in order to refine the offer over time.

4.5.4.2 Financial Support

VisitBritain have run an Events Support Programme since 2016. This is now called the Business Events Growth Programme and is funded through an annual grant from the GREAT programme via the Department for International Trade. The programme supports the attraction and growth of international business events which align with UK priority sectors by providing:

- Financial support - which involves giving grants to help support the development of a bid (e.g. marketing and digital activity) and increasing an event's appeal to overseas attendees. The fund will generally offer successful applicants up to £20,000; and,
- Government advocacy / soft support - which involves working with partners across Whitehall to leverage Ministerial support for the event, as set out in the government advocacy section above.

The Business Events Growth Programme awarded nearly £755,000 in its first three years across 38 events, many of which reported valuable rises in international attendees. For example, the programme supported the UK Security Expo 2017 in London, leading to a 53% increase in international attendees.

The Programme does not currently fund 'subvention' activities. Subvention is most commonly understood as providing direct financial assistance to help win and deliver events. The most common forms of subvention provided by national and regional government include direct financial subsidy, discounted venue hire costs and

hosting events as part of the wider programme.

A report commissioned by the Business Visits and Events Partnership identified that the UK has, in the past, provided very limited funding and in-kind support in order to win events (BVEP, 2016). Approximately half of the 85 destinations surveyed (both UK and international) stated they had lost bids to other destinations because of a lack of subvention funding. Only 13% of destinations stated that this was not an issue.

Encouraging a collaborative approach between partners involved in bidding and hosting events ensures that the destination can offer a more compelling, structured 'package' to the organisers when bidding for events and allows bidders to articulate more effectively the overall in-kind and direct support package. This should include collaboration between the local and regional government, destination management organisations, transport and accommodation providers as well as Mayoral support (where relevant). Glasgow in particular is well-known for its collaborative approach. 'Team Glasgow' comprises the Scottish Event Campus (SEC), the Glasgow City Marketing Bureau, universities, venues, hotels, restaurants, services, transport providers, local and national government all pulling together in a coordinated way to deliver the best possible experience to event organisers and visitors. This approach has encouraged events such as the European Association of International Education to be held at the SEC.

What we will do

VisitBritain have secured funding

from GREAT for the Business Events Growth Programme in 2019-2020.

The Business Events Growth Programme will consider the size and scope of the fund, as well as potentially moving away from the annual funding cycle to a longer time horizon that better aligns with the lead-in times for business events.

The Department for Digital, Culture, Media and Sport commissioned external research on the issue of subvention funding to cover the costs of hosting an event, and its relative importance when compared with other factors (DCMS, 2019c). The scope of the research project was not exhaustive, and its main purpose was to inform policy decision-making. The research has been published alongside this Action Plan and its findings will be incorporated into ongoing considerations around future UK government subvention support.

4.5.4.3 Destination Marketing and Promotion

Research shows that awareness and knowledge of many UK destinations remains low amongst those looking for host cities for their business event (Strategic Research and Insight, 2017). The research also shows that many destinations do not have the resources to reach international decision-makers by themselves.

The UK government is also keen for destinations to maximise the opportunities around delegate trip extensions. Research conducted by VisitBritain found that delegates who extended their trip for leisure purposes spent almost £1000 more than if they had not extended (VisitBritain, 2018). Trip extensions also provide an opportunity for destinations which are not well known for their leisure tourism offer

to encourage those visiting for events to stay for longer.

What we will do

Destination and marketing support will continue to be delivered by VisitBritain through the Business Events Growth Programme and their core business events work. Aside from providing financial support, their core activities will include:

- Hosting workshops across the UK which will share best practice on collaborative bidding for events. These workshops will be focused on increasing the skills of smaller destinations who wish to grow their profile for hosting international business events and wish to develop collaborative relationships within and between destinations
- Developing tools for destinations to use in their bids, including ad-hoc research into the business events market within the UK
- Continuing to host the annual MeetGB Conference, bringing together international buyers from across the world to meet UK destinations
- Providing advice and assistance to destinations on how to enhance a bid and destination offer for overseas delegates; and,
- Working with destinations to help showcase their regional highlights, ease of travel, ease of access and accommodation offer - not just for delegates but also their families and travel companions.

The Department for Digital, Culture, Media and Sport, VisitBritain and the Events Industry Board will together promote the Business Events Growth Programme, especially to those

smaller associations and buyers who are less likely to be familiar with the offer (see also Chapter 8 for further details of VisitBritain's Business Events Growth Programme).

4.5.4.4 Arrivals and Welcome

An important factor in the decision making process for organisers choosing where to host their event is the quality of the welcome that they and their delegates might receive.

Welcome includes the process delegates have to go through before leaving their own country (including visa applications, if applicable), having a pleasant airport experience and their experience of the host town or city. Welcome is particularly important in markets such as China, and it can have a significant impact on how the UK is perceived.

This evidence suggests that the vast majority of business event delegates to the UK can enter without a visa. However, the ease of getting a visa is important to the perception or view of a country's welcome. Amongst a sample of respondents from 20 countries, 44% of those surveyed stated that ease of visa application was a very important element of welcome, and this figure was higher in some countries that need visas to come to the UK.

What we will do

UK Visas and Immigration will provide relevant and appropriate visa support for applicable events that meet the criteria. Relevant support might include ensuring operational teams and/or Visa Application Centres are made aware of any anticipated peaks in demand, providing a point of contact for events managers to liaise with on visas and access to premium lounges in airports.

Border Force will work with Port Operators to provide appropriate support for events that meet the criteria. This could include the offer of a premium service, on a cost per-delegate basis, which could include a Fast Track service at airports and a targeted 'warm welcome' at ports of entry. The welcome might include banners, posters and event information desks.

As a result of recent changes, visitors from Australia, Canada, Japan, New Zealand, Singapore, South Korea and the USA are now able to use the ePassport gates at ports across the UK airports and juxtaposed controls in a move designed to have a transformational impact on their border experience. This change is a prime example of sending the message that the UK is open and welcoming.

4.5.4.5 Capacity and Connectivity

Ease of access is deemed one of the most important factors in destination choice with 77% of organisers placing it in their top three priorities (Strategic Research and Insight, 2017). London scores highly for 'ease of access', in part due to its availability of airports. Manchester and Birmingham also score relatively highly, but other cities are often perceived as 'awkward' to get to, which is one of the main reasons they do not win more events. Ease of access does not only relate to flights but how easy it is to get from the airport into the city and/or venue.

Suitability of venues is the second most important factor when choosing a destination with 62% of organisers placing it in their top three priorities. This includes assessing their overall capacity, number of breakout rooms and

whether it fits the brand image of the event. The UK is well rated on this aspect of decision making by those who know about its cities, although there is a view that smaller cities do not have large enough or suitable venues. Assessing the capacity of venues, however, is not as simple as counting the number and size of venues. One issue is seasonality - 52% of exhibitions take place within the months of March, September, October and November. Conversely, July, August and December combined had 8% of exhibitions. This would indicate that there are a number of months where capacity is tight, but others where there is the space to host.

What we will do

It is recognised that although the UK's connectivity to the rest of the world is high, the onward journey can be more complex. The Department for Digital, Culture, Media and Sport will work with VisitBritain and the Rail Delivery Group, who will facilitate talks with the train operating companies, to explore ways of improving connectivity to and from business events venues across the UK. This will include liaising with travel providers to investigate whether the timing of target events is fed into timetable and maintenance decisions. It will also include raising awareness of existing connectivity.

We will require those events seeking support from UK government to have included the involvement of transport partners at the event bidding stage, with an emphasis on delivering improvements to the 'final mile' where relevant.

VisitEngland will conduct a detailed exercise to assess all the venues that can accommodate a plenary for at

least 400 people in England and will assess the availability of these venues over the coming years. This will help the UK government understand existing capacity and feed into the 'attract, grow and create' decision-making process.

We will assess how conference centres across the UK can be financially supported in developing their access to full fibre broadband and will review the opportunities for the adoption of 5G as this technology becomes more widely available. To support the sector's ability to attract international delegates, the UK government will offer a new £250,000 scheme to improve broadband connectivity in conference centres.

4.5.4.6 Government Coordination

In order to deliver the support offer identified in this Action Plan, the government recognises the need for a coordinated, efficient, cross-government approach. This includes a pipeline, which VisitBritain is developing, of international business events that represent key sectors and address economic impact, seasonality and regional spread. VisitBritain will work with The Department for Digital, Culture, Media and Sport and other UK government departments to identify a prioritised list.

What we will do

The Department for Digital, Culture, Media and Sport and other relevant UK Government Departments will continue to work closely with the Events Industry Board, and its new Chair Michael Hirst OBE, to help grow the business events industry across the UK. We have updated the Board's terms of reference to match the contents and delivery of this plan.

The UK government agrees with the views expressed by the Events Industry Board that we need to have closer engagement with key players in the events industry on the ground, such as those responsible for conference venues and hotels. The Board will, therefore, set up a panel of Senior Industry Leaders to meet twice yearly and to be chaired by the Minister for Arts, Heritage and Tourism.

The Events Industry Board has set up two working groups which look at specific issues that the Board have identified as being important to the industry. These working groups will review issues across the UK and will consult with the Devolved Administrations on findings, as appropriate:

- a. Capacity: Chaired by Chris Skeith, CEO of the Association of Event Organisers, this group is assessing the infrastructure that we have in the UK to support the industry – including venue capacity, transport, digital and investment; and
- b. Talent and skills: Chaired by Sarah Wright, events consultant, this group is looking at how the events industry can remain competitive in staff recruitment and retention.

The working groups submitted their reports towards the end of 2019 and some of their key findings and recommendations are included in Chapters 6 and 7 of this report. These are being considered by the Events Industry Board and by the UK government.

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CHAPTER 5 IDEAS

5.1 Introduction

The first of the five foundations of productivity in the government's industrial strategy (see Chapter 4) is 'Ideas', and this chapter will describe a number of key ways in which the events industry supports and delivers the government's objectives of increasing creativity and innovation across the UK economy. It will also show the UK's leading edge position in the development and application of technology for the management of events.

The chapter contains sections on: the creative industries, creative event agencies, technology and digital developments in UK destinations, and event technology.

5.2 The Creative Industries

The 'Creative Industries' is an umbrella term covering a range of sub-sectors where more than 30% of staff are in creative occupations.

The sub-sectors include advertising, architecture, crafts, design (graphic and fashion), film/tv/radio, IT/software, publishing, museums/art galleries, and music/performing arts.

In 2001 the government's Creative Industries Mapping Documents described 'Creative Industries' as a term for *'those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property'* (DCMS, 2001).

The creative industries are:

- Bigger than UK Life Sciences, Aerospace, and the Automotive Industries combined
- The largest sector falling under the remit of the Department for Digital, Culture, Media and Sport (DCMS) for jobs (2 million), and the second largest for gross value

added (GVA) to the national economy (£101.5 billion)

- The creative industries have grown twice as fast as the national economy for GVA, and three times as fast in terms of jobs created
- Vitaly important for exports (generating £46 billion in goods and services worldwide), with the creative industries' export value nearly double their share of the national economy, helping to make the UK a great, global trading nation
- Also important for the creation of tomorrow's jobs, with a high proportion of creative industries businesses being small and medium-sized enterprises (SMEs), whose work is often project-based and automation-resistant.

The creative industries election manifesto, published October 2019, states that, 'beyond the economic benefits, the creative industries

continue to tackle regional inequalities, build communities across the UK, and enable individuals to lead lives that are happier, healthier, more sociable, and enriched through access to culture and creativity' (Creative Industries Federation, 2019).

5.2.1 Creative Industries Sector Deal

As part of the government's Industrial Strategy, a Creative Industries Sector Deal was launched in March 2018, aiming to build on Britain's creative strengths right across the UK by helping businesses to innovate, access investment and skills, protect their ideas, and export (BEIS & DCMS, 2018).

The Creative Industries Sector Deal states that:

'The creative industries are at the heart of the UK's competitive advantage and – in the face of technological transformation at home and new possibilities globally – represent a major strategic opportunity. Already booming, the creative industries are fast-growing and high-exporting – both to the EU but also internationally. The 'soft power' influence of the sector means it has a critical role to play as the UK exits the European Union and we create a Global Britain.'

'The deal builds on many of the recommendations of Sir Peter Bazalgette's independent review of creative industries, which explored the challenges facing a sector comprised of firms rich in intellectual property where more than nine in ten enterprises employ fewer than ten people.'

Led by the Creative Industries Council and with important input from the Creative Industries Federation and other leading voices across the sector, the deal will invest

more than £150 million across the lifecycle of creative businesses through the enactment of the following policies:

a. **Places**

Creative industries help to generate prosperous communities across the UK because they give places strong identities, as well as driving employment and growth. While research has identified some 47 clusters of creative businesses around the country from Dundee's games hub to Salford's MediaCityUK, almost half of creative businesses are concentrated in London and the South East. The deal tackles this via new public investment and industry backing for leading creative industries clusters with the potential to compete globally, thus helping more of the country to project Global Britain to the world. The deal will support creative centres across the country to enable clusters of world-class businesses to increase GVA and employment. The government (DIT and DCMS) will commit £20 million over the period 2018-2020 to roll out a Cultural Development Fund so that local partnerships can bid for investments in culture and creative industries, with industry contributing funding, networks and leadership.

b. **Ideas**

The deal aims to open up Research and Development (R&D) funding to catalyse innovation. The creative industries already invest substantially in R&D: from epic, outdoor illuminations in '59 Production's Bloom' to the world-leading fashion customization of 'Unmade'. But there are also obstacles including the fragmentation of a heavily SME-based sector and the fact that creative research

and its application can be seen as separate to 'hard' industrial research, even though it often involves many of the same technologies.

The Industrial Strategy Challenge Fund and industry will invest an estimated £58 million to harness the power of immersive technologies (i.e. technologies such as Virtual, Augmented and Mixed Reality) and double the UK's share of the global creative immersive content market by 2025. The government will also invest £64 million in an Arts and Humanities Research Council programme to deliver eight partnerships between universities and creative businesses across the UK, creating 900 business-led collaborations, 360 jobs and 65 new businesses, backed by a National Policy and Evidence Centre.

c. **Business Environment**

Creative industries are nimble, fast-growing and globally exporting – but they also face barriers to achieving scale. There are recognised market failures in access to finance, especially outside London. Online piracy continues to be a serious inhibitor to growth in the creative industries. Technologies like stream ripping and illicit streaming devices enable illegitimate access to content without rewarding its creators. Many rights holders are also concerned about how their works are exploited online, especially where they are used without generating substantial returns for content creators. The sector deal will tackle copyright infringement, continue to address the transfer of value from creative industries and progress work on closing the value gap at the European and domestic levels.

The government will convene online intermediaries and rights holders to consider the need for and agree new Codes of Practice for social media, digital advertising and online marketplaces. It will also extend investment for the successful 'Get it Right' copyright education campaign. The deal will also reduce barriers to accessing finance for growth. The British Business Bank will seek to improve access to finance for high-growth firms outside London – including creative businesses – via a commercial investment programme to support clusters of business angels. The government will help creative firms to access finance by investing up to £4 million in a programme of intensive business investment readiness support.

The sector deal will build on strong export performance to drive Global Britain. The government will create an industry and government Trade and Investment Board targeting a 50% increase in creative industries by 2023.

d. **People**

The UK boasts world-class skills and talent across the creative industries. The sector deal sets out how government and industry are taking steps to overcome existing barriers to entry, as well as addressing future skills needs. In order to increase the supply and diversity of skills and talent in the creative industries, government will make up to £2 million available - with £12 million in-kind industry investment - to support an industry-led creative careers programme aiming to reach at least 2,000 schools and 600,000 pupils in two years and industry development of apprenticeship standards.

Industry will provide further leadership on diversity and scope expanding the voluntary Skills Investment Fund supporting on-the-job training.

5.3 Creative Event Agencies

Section 5.3 of Chapter 5 has been written by Rick Stainton, Group Executive Director, Smyle Group (www.smylegroup.co.uk). Smyle is one of the leading creative agencies in the UK, supporting global brands around the world in delivering key content and brand experiences through live and moving image projects. Smyle's team of circa 100 staff develop strategic partnerships and create content from their ideas that are smart, bold and matter.

Ultimately, Smyle's project solutions aim to deliver measurable behavioural change, whether the audience is internal staff or external customers. Smyle has won 'UK Event Agency of the Year' 5 times in the last 11 years and is the only agency in the events industry to have been on the 2018 Sunday Times Fast Track 100 and International 200 lists. Key clients include: Samsung, Salesforce, Facebook, ARM, BT, EY, Roche, Babcock, RedBull, and Ryder Cup (European Tour).

Rick Stainton writes:

Event services tend to fall into two buckets: strategy and creative-led event planning, and production-led event delivery. Today's larger event agencies often offer robust services in each bucket, whilst smaller agencies are closely aligned to other 'creative industry' companies. Event creative includes the development of new concepts and ideas, driven by strategic insight, designed to bring a brand to life in a fresh way. From advertising agencies to architecture to broadcast media to event agencies,

the IP (intellectual property) is in creative thinkers dreaming up ideas and concepts that can then be produced.

Agencies like Smyle are the lifeblood of the live and creative events industry, sourcing and developing long-term relationships with global brands from the B2B, B2C and B2E (Business to Enterprise) sectors.

The leading agencies in the industry are often placed on clients' preferred supplier rosters as strategic partners, consulting on long-term communication strategies and supporting commercial goals at Board and C-Suite levels.

The core outcome of these partnerships is live experiences that will deliver on the desired goals – essentially a collection of business activities that encourage people to interact with one another and to consume content in immersive, physical environments. Performance is evaluated across key desired outcomes, including driving pipeline, building brand affinity, and strengthening customer relationships.

5.3.1 External and Internal Audiences

External events can also impact a broader audience, not present at the experience. For consumer-facing businesses, events can additionally serve as a platform for brand advocacy, often through amplifying live experiences via digital and social media. For business audiences, events can generate amplification of product launches, thought leadership positioning (and more) through social sharing and media coverage.

Internal audience events that mostly involve the client's employees tend

to focus on education, recognition, team building and delivering corporate strategy, product or business updates. For internal events, success is based on similar but aligned outcomes, including: driving commercially beneficial behaviours, building brand affinity and strengthening employee loyalty.

5.3.2 Live Events

Live events cover a wide array of categories, including (but not exclusive to): conferences, symposia, forums, recognition and reward programmes, exhibitions / trade shows, brand activations at industry events, product launches, press events, experiential and hospitality activations at music, cultural and sporting events, roadshows and in-store activations.

Often these live events are a key part of a wider marketing campaign that includes advertising, press and social media elements before and after the main live project. For internal staff events, this may include a communications campaign to tease the audience before and support a cascade of content after the event.

A primary driver of external event marketing success is the focus on interaction. Unlike other marketing channels (e.g. broadcast advertising, PR), event marketing is driven by dialogue – two-way interaction between a brand and its target audiences. Where traditional advertising talks ‘to you’, live marketing talks ‘with you’.

The same principle applies to staff events, in which discussion between employees and leadership, and interaction between employees is critical to event success (rather than relying on ‘death by Powerpoint’ and ‘show and tell’ presentations on stage).

5.3.3 Event Content and Project Delivery

Event content can be delivered in many forms with the support of multiple technological and digital media, whether it be on-screen graphics, animations, video and streaming, AR, VR, as well as smartphone apps. Sometimes these distinct formats overlap to support higher levels of understanding, retention and suiting different audiences’ learning styles and preferences. Event content can (and should) be made easily accessible for sharing and referring to post-event.

Once an agency has been appointed on a project or campaign activation, it often outsources key speciality services to third-party suppliers that are crucial and often intricate contributors to successful project delivery. These include venues and hotels to accommodate the live events, AV and technical service providers, social media agencies, structure and scenic construction companies, caterers, power and logistic specialists, décor companies and talent/performer agencies, to name but a few.

It is most often the agencies that lead on collaborating with clients, developing strategies and concepts and then commissioning their internal design, content and project teams to deliver on the client’s requirements. The level of engagement of venue and supplier partners and freelance specialists depends on the individual agency’s model i.e. what they have in-house versus what they need to outsource, as well as whether the clients themselves may retain these skillsets and remit in-house. In some instances, the client may commission a venue direct or create key content themselves, especially if their

preferred agency does not have the experience at its core to do so.

Clients hire event agencies because of specialist expertise in live events – this can also include immersive creative ideas for physical activations, health and safety, sustainability / environmentally sensitive approaches, and embracing new experiential technologies.

Ultimately, it is agencies that are most often responsible for the successful delivery of the project to meet the client’s business objectives.

5.3.4 Industry Issues and Challenges

At an industry level, event agencies must continually identify, recruit and develop talent, and drive the profile and importance of the events industry to the wider UK economy. Some agencies collaborate with education and academic institutions – Smyle, for example, has an ongoing programme involving placements, educational talks and recruitment fairs with Central St Martins, The Guildhall and the University of Greenwich, amongst others.

One final point is where the UK live events industry is currently at its weakest - defining itself – as outlined above is not a one-liner or simplistic. But its reach across multiple areas of marketing, business events, staff communication, the creative services and media is clear.

Clients hire agencies to create change that they themselves either do not have the capacity or structural ability to achieve. The UK has a global reputation for excellence in this area.

The understanding of what our industry actually is and its leading position on the world stage is key

Figure 5.1 A Creative from VisitBritain's Events are GREAT Campaign



Source: VisitBritain Business Events

to its evolution – this should in turn continue the growing trend of attracting corporate budgets away from more traditional forms of marketing and communications, encourage external investment, bring in and develop the best talent and, to underpin all of this, much needed government recognition and support.

Government understanding of, and proactive engagement with, our industry needs to match the events industry's current and increasing contribution to the UK economy, employment, exports, and its reputation for delivering the highest quality, commercially strategic and most innovative projects.

In summary, to get a mental picture of what creative event agencies do at their pinnacle, picture the 2012 Olympic Games Opening Ceremony. A global showcase for the UK that brought the nation together and left a global legacy of desire to visit our

Figure 5.2 A Creative from VisitBritain's Events are GREAT Campaign



Source: VisitBritain Business Events

wonderful country. A key point to note here is that events are often a single point in time that leave lasting affinity.

Figures 5.1 and 5.2 are part of the creative used in VisitBritain's Events are GREAT marketing campaign, and

are designed to highlight the UK's innovative talents and creative event strengths. Further details of this campaign are given in Chapter 9.

Case Study 5.1 illustrates the creative benefits brought to a major corporate event by event agency DRPG.

CASE STUDY 5.1 Empowering Leaders with John Lewis Partnership, by DRPG

The John Lewis Partnership and creative event agency DRPG worked together on the Empowered Leadership Event at the Birmingham's NEC which took place in 2019. The objective of the large-scale event was to bring together the 8,000+ leaders and people managers of the Partnership, inspiring and empowering them to become specialists in people and encouraging them to embrace a new style of people-first leadership.

The event was planned and staged in just a few weeks and was built around a learning activity day where people managers from across the UK came together for an emotional experience. It was designed as a day of immersive experiences where everyone gathered together and got involved, using one space containing four separate and distinctive activities. The first part of a much wider leadership offer to support people managers across the Partnership, the event took place over seven days, with around 1,300 people on each day.

Kirsten Caress, manager, personnel solution development, John Lewis Partnership: *"We wanted to focus on our people and shift from operational leadership to empowered leadership. We wanted people to leave the event believing they had become specialists in people. It was about building relationships with Partners, investing in Partners and understanding the impact they have on their Partners in the way that they show up."*

On arrival, everyone came together in an opening event that focussed on showcasing the real people behind the Partners which set the tone and the energy for the day. Delegates then broke out into four immersive experiences based on Everyday Leadership, Leadership Learning, Leading as Me and Leading Culture. Once the leaders had attended each of the four spaces they returned to the main room for a 30-minute closing session where they discussed their experiences in a space and environment that encouraged conversations about themselves, their people and the future of the Partnership.

The whole event was a truly collaborative effort between DRPG and the Partnership. Richard Hingley, creative director, DRPG: *"The training partners facilitated the sessions four times a day over the seven days. It was amazing*



Figure 5.3 Setting for John Lewis Partnership event

Source: DRPG

to see those Partners not just believe in the content but actively work on developing it. The John Lewis Partnership set out to give people ownership of those areas, so it really was a working partnership. That's ultimately what enabled us to do what we did in a short period of time."

Philip Reddall, proposition lead, learning, development & progression, John Lewis Partnership:

"Throughout the week we started to get more and more feedback on how it was landing. On any given day it was vastly overwhelming. I remember walking around saying, 'It can't be this good!'. In terms of energising and helping people have the belief, it hit home more than anything else we've ever done."

Kirsten Caress:

"There was so much going on – the emotional reaction, the surprise element, the impact, all the small touches, the attention to detail in terms of design was phenomenal. It was really genuinely talked about for a long time after. It's been really satisfying knowing that what we tried to do had landed."

Working with DRPG was a good cultural fit. The team understood what we were trying to achieve and how we were trying to achieve it. They embraced a different way of doing things. One of the reasons for the event's success was that we partnered so well together. It felt very unique, very special. Our Partners came out saying it was a highlight of their careers."

www.drpgroup.com

5.4 Technology and Digital Developments in UK Destinations

UK cities are building stronger alignments between business events and their expertise in a number of high-priority sectors. This section of Chapter 5 focuses on destinations' alignment with the technology and digital sector, based on a report entitled 'How UK Cities Excel at Hosting Conferences in Advanced and Creative Industries' (VisitBritain, 2018).

The report states that the technology sector in the UK is larger than the rest of Europe combined. It has the highest number of IPOs (initial public offerings), the most 'unicorn' start-up companies (with US \$1 billion valuation), and the largest e-commerce market in Europe. With technology underpinning every aspect of business development and economic growth today, the UK's leadership in technology research and development fuels innovation across all sectors, from fintech to fisheries.

Furthermore, the UK's tech industry is expected to grow exponentially. According to the Tech Nation 2017 survey report: 'In 2016 UK digital tech investment reached US \$9.1 billion – 50% higher than any other European country'.

London consistently tops the European Digital City Index, based on the level of venture capital pouring into the city's tech sector. Building on that, London Tech Week launched in 2014 and today it is the largest tech sector conference in Europe, supported locally by more than 2,600 clusters of tech companies spread throughout the city.

However, there has also been a real surge of new investment in the technology sector in recent years outside London. The Tech Nation report explains: 'Nearly 70% (68%)

of total UK digital tech investment in 2016 was in regional clusters beyond London. Tech businesses in these clusters raised more than £4.6 billion in funding', with large investments in 2016 going to Edinburgh, Cambridge, Bristol and Bath, Oxford, Manchester, and Sheffield.

Further examples of individual cities' developments in technology and digital and links with the events industry included in the VisitBritain/Skift report are:

Manchester

Manchester has the second highest number of tech clusters in the UK with over 5,000 companies in advanced and creative industries employing more than 63,000 people. The MediaCityUK development completely revitalised the old city docks, and is now home to the BBC, University of Salford, ITV television, and numerous film production studios and creative venues.

The world's leading figures in children's digital and media content gathered in Manchester for the Children's Global Media Summit in December 2017. It took place at Manchester Central (convention complex), and its purpose was to redesign the future of media for young people, with insight provided by companies such as BBC, Netflix, Disney, TalkTalk, YouTube, the Premier League and Facebook.

Liverpool

Liverpool is a leading hub of innovation in IT and AI at the Hartree Centre at SciTech Daresbury, which houses the most powerful supercomputer in the UK dedicated to industrial R&D. In 2015 the UK government invested US \$150 million in the Hartree Centre, while IBM dedicated \$267 million to deploy the first Watson cognitive computing research centre in the country. The Hartree Centre hosts a variety of conferences and events throughout the year to 'open up the

power of data-centric computing, big data and cognitive technologies to industry and academia'.

Edinburgh

Edinburgh is the UK's second-largest financial centre and a leading digital tech cluster in Europe. The city is responsible for developing two unicorn companies – Skyscanner and FanDuel – and three world-class universities including the University of Edinburgh, renowned for its School of Informatics. "For events in the tech sector, if you're able to open doors with start-up companies and local enterprise organisations, and put them in touch with young entrepreneurs, there is certainly a demand for demonstrating that you can facilitate that happening within your destination," says Amanda Ferguson, Head of Business Tourism at Marketing Edinburgh. "From the meeting planner and attendee perspective, it gives a real sense of where the conference is being placed," she continues. "It's an opportunity to share knowledge and benchmark with these organisations, and potentially then grow their own membership with smaller organisations that maybe haven't hit their radar yet, and to engage them. Also, most start-ups are flexible, they're dynamic, they're open to new ideas and doing things differently. That can be really exciting for delegates, and deliver some fruitful collaborations and discussions for them that they haven't come across before."

The Edinburgh Centre for Robotics hosted the 3-day European Robotics Forum in March 2017, comprised of researchers, engineers, managers, entrepreneurs, and public and private sector investors in robotics R&D. "The Edinburgh Centre for Robotics, a joint collaboration between Heriot-Watt University and The University of Edinburgh, is raising the profile of Edinburgh as a centre of excellence in robotics," says Edinburgh ambassador Dr Patricia Vargas from Heriot-Watt University.

Bristol

Bristol illustrates the level of innovation sweeping across the UK in regional cities. Ben Trehella is a local software developer who launched a mobile app company over a decade ago, before changing his focus to virtual reality. He started a meet-up for local VR developers in 2014, which led to developing a VR conference in 2015. In 2017 Trehella's 3-day VR World Congress attracted 1,200 delegates from 37 countries, tripling attendance from the year prior. This event was a recipient of VisitBritain's Event Support Programme, driving growth of international delegates as the event moved into a larger venue to accommodate its expansion. "To further innovation in general, there's definitely been a shift in Bristol where academia and industry are collaborating much more closely, because there are benefits for each," says Trehella. "If you're running a business, that expertise from the universities is absolutely vital to stay ahead of the curve. From the universities' perspective, there's the realisation that there's a lot of innovation happening in companies. So they're keen to be part of events like VR World Congress, because they want to get their research into commercial industry. And likewise a lot of international companies are keen to learn about that research."

Belfast

The fast-growing cybersecurity sector is worth more than US \$30 billion a year to the UK economy, and it is currently growing at around 10% yearly. Belfast is evolving as an important cybersecurity cluster in the UK, having hosted two industry conferences in 2017: The World Cyber Security Technology Research Summit and the OWASP (Open Web Application Security Project) AppSec EU, which attracted more than 1,000 attendees. Leading cybersecurity companies have invested heavily in Belfast operations, and Queen's University Belfast is home to the

Centre for Secure Information Technologies. The research facility is the UK's Innovation & Knowledge Centre for secure information technology.

5.5 Event Technology

This section defines the scope of event technology, identifies and assesses new and emerging trends, details the global opportunities for London and the UK to further develop market share, and comments on issues where there is still room for improvement in the application of event technology across the UK.

The chapter draws on contributions from two event technology experts: Paul Bullivant, Founder of Firebird Conference Systems (www.firebird.systems) and Dr James Morgan, Digital Innovator, College of Design, Creative and Digital Industries, University of Westminister (<https://www.westminster.ac.uk/about-us/our-people/directory/morgan-james#about>).

The section also includes two case studies and a short profile of a successful UK event technology company, venuedirectory.com.

Paul Bullivant writes:

5.5.1 Defining Event Technology

When talking about event technology, it is good to clarify what is meant by an event and where in the event's lifecycle the technology is being used. Firstly, is the event an online event or offline? Some of the more traditional event technology has been focused on online technology such as teleconferencing and video conferencing. But online technology solutions are now well established and most event technology is focused on physical events rather than virtual ones.

The technology is not always what the delegate sees at the actual event itself. There is technology working

behind the scenes before, during and after an event. It is easy to think of the delegate experience and the technology that can be used to engage and even entertain a delegate. Projection mapping technology at an event can certainly entertain and facial recognition technology for registration can make an event feel modern and up-to-date.

5.5.2 The Added Value of Event Technology

But quite often, one is left asking "What is the real value of the technology?" The mobile app space is saturated with 'new tech' offering 'better networking' but, often, such developments are recycling the same initiatives that may actually detract from one of the main advantages of events: meeting people.

So, one is left looking for the real value in event technology and it can be the hidden technology that is really adding value to modern events. Onsite Wifi or NFC (near-field communication protocols that enable two electronic devices, one of which is usually a portable device such as a smartphone, to establish communication by bringing them within 4 cm of each other) tracking to identify which exhibits and seminars are most popular at different times of day can give really valuable insights to organisers and exhibitors about what attracts delegates. Management software used in the lead-up to events can help event organisers save time and energy on administrative tasks, freeing them up to put their energy into the superlative actions that will make their event stand out.

Event technology is a rapidly changing industry that has evolved greatly over the last decade, especially as the cloud has become established and the mobile phone has become ubiquitous. There are even events like 'Event Tech Live' (see case study) that exist just to showcase event technology.



5.5.3 New and Emerging Trends

Artificial Intelligence (AI) is the current buzzword around all technology, including event technology. It is in its infancy and the current iteration of AI is perhaps poorly named as it is focussed on using large amounts of data to produce a set of rules that will predict future behaviour and activity. Events collect a lot of data from delegates through their involvement with event technology e.g. apps. The opportunity for business is to be able to use that data to enhance the delegate experience and to extract valuable information for event organisers and exhibitors. This is definitely an area for growth with data being collected at every stage of the event process.

There is also room for growth in the online or virtual event space. In the last decade, web and teleconferencing software has developed to maturity with the problems of providing a good and reliable virtual conferencing experience being a thing of the past, especially on a small scale with smaller meetings.

On a larger scale, there are more and more events which run live streaming of their events but it is still very much a one-way experience with limited

interaction for offsite delegates to be truly involved. Virtual participation in events is an exciting area for growth especially as the environmental impact of events is recognised and the pressures of flygskam (flight shame) take hold. More and more events are looking to sustainability with zero plastic and other initiatives but the ability to use event technology to enrich the experience for virtual delegates is exciting.

Advances in virtual reality (VR) experiences could be the way forward with immersive and 'real' experiences where virtual delegates wearing VR headsets can interact as if standing next to other delegates. This could be an area for growth though one has to look at the slow take-up of VR in the gaming industry and the disorientating effect and discomfort people feel when using this technology. Also, we are some way off replicating the subtleties of body language experienced in the real world. The main challenges in this area are around providing an experience for delegates that is as effective as the human interaction that delegates value so much.

5.5.4 Issues

So, what is the UK's position in all of this? That is hard to say. We have some amazing venues for holding events.

We speak the international language of trade and academia. We have a rich talent pool from our universities that can supply the event technology industry with future leaders. But we have our weaknesses too.

The most obvious one that holds back event technology is the poor Wifi in venues. At a recent high-profile technology summit at a major convention centre in London, a presenter attempted an interactive demo with participants. This involved delegates visiting a website on their mobile phone. As a keen technologist, I tried to join in but found I was in both a Wifi and 4G deadzone and we all sat and watched as less than 5 out of the 400 seminar participants were able to interact. Venues need fast, easy and reliable Wifi in order to enable tech companies to maximise the delegate experience and empower event organisers to fully embrace event technology.

Dr James Morgan writes:

5.5.5 Opportunities for the UK in Event Technology

The UK has been at the forefront of technology innovation and adoption for many years. This includes the events industry. It's an area that has seen rapid growth in the innovation of new technology types and adoption of both home-grown and imported technologies. Although up-to-date robust data on this market sector is unavailable, indications based on global consultancy Frost & Sullivan and their Global Event Management Software report (2013) forecast increasing growth rates in the sector. The UK has been spearheading the accelerated growth trend from the estimated global market of \$31.9 billion (2016 total market estimate). The global growth trend and the UK's contribution to this have been aided by three factors: first, by the cultural trend of increased technology adoption rates for events; second, the trend of an

CASE STUDY 5.2 Event Tech Live – Another UK First

Established in 2014, Event Tech Live is the world's only trade show dedicated to event technology. With over 140 exhibitors, the multi-strand conference and exhibition gives event technology providers from the UK and the rest of the world the opportunity to showcase the latest technological developments. The show is attended by over 2000 event organisers, promoters, agencies and brand representatives from 47 countries over 2 days in November each year. Event Tech Live also takes responsibility for contributing to innovation in event technology.

The Launchpad, Event Tech Live's well-established start-up programme, runs each year alongside the show. The programme is a cost-effective liaison between nascent

next-generation event tech suppliers and industry buyers and investors. Recognised for its impact on innovation, the Launchpad benefits from significant subsidy and sponsorship and its own stage programme featuring live tech demos from the next generation of exhibitors.

Event Tech Live climaxes with the Event Technology Awards. The awards programme recognises leading-edge innovations and the achievements of companies delivering digital and technological solutions to the events industry, globally. The much coveted awards are the premier industry award specific to the event technology sector.

www.eventtechlive.com/

increase in UK-based innovations; and, finally, through the expanding trend of London as a global technology hub. Event Tech Lab research in 2016 found that London was the No. 1 host city for event technology companies in the world.

5.5.6 London as a Global Technology Hub

The wide geographic spread of innovators around cities in the US, Canada, Europe, the Middle East and Australia has utilised the location, talent bank and city attractors of London as a new markets gateway. London as a crossroads for technology providers has attracted a variety of companies to invest in UK offices. US companies such as Aventuri, Cvent (see case study) and Eventbrite, European companies such as EventMobi and Slido and Middle Eastern company Protec and Australian company Events Air are examples of some of the international companies that have established UK bases to gain easy access to the European, Middle Eastern and African markets. To reinforce London's position as the leading event technology cluster, the city also hosts the world's only dedicated trade show for event technology companies, 'Event Tech Live' (see case study), with over 140 exhibitors every November. The trade show is complemented by the Event Technology Awards, a

competition where companies from around the globe vie for international recognition of innovation in event technology.

5.5.7 Innovation in Event Design and Delivery

Innovation in event design and the need for greater management and operational efficiencies have seen substantial investments into event technologies. Easy access to leading-edge technologies on event organisers' door-steps to enhance event management processes and the attendee experience has created a competitive advantage for UK event organisers. UK investment funding into technology generally is the contributing factor that has propelled the home-grown event technology market. Investment funds such as Fuel Ventures support a stable of event technology companies that includes Assemblr, Eventscase, Expocart and Last Second Tickets.

Innovation is evident on varying scales and for differing event functions, ranging from attendee engagement through to event management and operations technologies. Sole traders such as TogethAR are developing leading-edge applications. Their augmented reality (AR) app allows attendees to superimpose computer-generated images on an attendee's

smartphone view when using the camera function. The emerging AR technology is at the early adoption stage. Mid-size companies are investing and innovating in-house. DB Pixel House, an interactive creative agency, and Hawthorn, the technical production company, are continually developing bespoke technologies for their clients. A recent award-winning example by Hawthorn was for using motion sensors, lighting, cameras and a giant slide to create a 'selfie' experience for Adobe. Giant iTab, the giant smartphone providers, and Disguise, the event video technology manufacturer, are exporting their products globally.

Multi-million pound companies such as Reed Exhibitions are innovating in the exhibition space with in-house proprietary solutions created by a global tech team of 400 personnel, headquartered in London. The clustering of event technology developers and companies in London and south east England has created a climate for innovation in emerging technology areas. The influence of the cluster can be felt around the UK with innovation taking place in other cities. Birmingham-based staffing company Crewsaders has developed an in-house staffing solution that has been nominated for awards. Award-winning event planning solution

Line Up Ninja is based in Leeds. World firsts and award winners are demonstrating the UK's creativity and innovation, globally.

The world's first Artificial Intelligence event application – GRIP, the event networking platform – launched in 2016 in London. It uses textual analysis to sort and match attendee profiles to create more efficient networking opportunities for attendees. Other leading-edge companies such as Exposure Analytics, the AI-powered facial recognition and data analysis specialists, can recognise attendee

behaviour and emotion. Airfinity, the big data analytics platform for events and sponsorships, crunches batches of organiser and open source data to highlight sponsorship opportunities for event organisers. VR JAM, the world's first real-time mixed reality (XR) experience platform, streams live, virtual and augmented reality content to anywhere in the world. Citizen Tickets' blockchain technology – usually used in the financial field to authenticate data - launched in 2017. As the world's first blockchain ticketing platform, it has the ability to cut out fraudulent ticketing practices.

Whilst the established events technologies such as videoconferencing, podcasting, web conferencing, webcasting, event apps and event management platforms are popular, it is the emerging technologies - AI, Blockchain, AR, VR, XR and new hardware developments – that are attracting development funding and export enquiries. Home-grown companies, coupled with the clustering of international technology companies in London alongside exhibition organisers and event production companies' in-house development teams, make the UK's event technology sector great.

CASE STUDY 5.3 London as HQ for Cvent's European Operations

Cvent established its first European office in London in 2014. When the world's largest B2B event technology company was initially looking at expanding into Europe, it did a lot of market and customer research. The European office was going to be the first international location outside of its Indian office.

Cvent ultimately decided on London for the following reasons:

- First, Western Europe was where most business events in Europe were being held
- Secondly, they were seeing higher event technology adoption and interest among UK event organisers compared to other European countries
- And thirdly, London was known to be a rapidly growing and innovative hub for technology. There were many innovative technology businesses in

London, not only in event technology but across all industries. Analysis shows that of the Top 250 companies with global or regional headquarters in Europe, 40 per cent are located in London

Cvent also found that the UK's events industry was more receptive to technology adoption and innovation

Finally, and most importantly, Cvent already had an established customer base in the UK. Additionally, London's large population of European nationals offered them a rich pool of languages and cultural skills that helped them communicate with their European customers effectively.

Cvent employs just over 130 people in London.

<https://www.cvent.com/uk>



Company Profile – venuedirectory.com

Founded in 1993, with a floppy disk and a belief that meetings and events should be less time-consuming and more efficient for the meeting planner, venuedirectory.com produced the first electronic directory for sourcing meeting and event venues in the UK before quickly moving to CD-Rom and eventually a website in 2000, giving users around the world instant and easy access to detailed information on thousands of venues.

Michael Begley took over the company in 2008 and, since then, venuedirectory.com has complemented its portfolio with numerous developments and products such as its exclusive software, GRATIS, the powerful

cloud-based booking module, and Live Availability, a widget created to sit on venues' websites, allowing clients to make small meeting bookings hassle-free 24/7.

Based in Bournemouth, venuedirectory.com's success can be attributed to the vast experience and MICE industry knowledge of the directors. Each possesses an intrinsic understanding of clients' needs, having built their careers in the venues, meetings and events industry.

With over 60,000 venues worldwide, over 60 booking agents and 50 employees, venuedirectory.com has used its extensive industry knowledge to continue to create important products for the meetings and events industry.

Today, with 26 years in the industry, venuedirectory.com sees itself as a custodian of data, having rapidly progressed as UK market leaders of online venue data.

www.venuedirectory.com

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CHAPTER 6

PEOPLE

This chapter has been written by Caroline Jackson, PhD., event educator and researcher. Caroline is a Vice Chair of the Business Visits & Events Partnership (BVEP) (2016-18, 2018-2020, 2020-2022), as well as a founding and Executive member of the Association for Events Management Education (AEME) since 2004. Formerly Head of Department of Events & Leisure at Bournemouth University, Caroline left academia to pursue her interests independently. Contact: caroline4events@gmail.com

6.1 Introduction

The events industry could not exist without human capital. Despite advances in technology, events rely on people for their existence, such as the creativity and the human empathy that they provide. Human capital is the stock of skills, knowledge and experience that a person or workforce possesses. A major part of event management is the leadership and management of human resources. As an industry it is important to understand the nature of this human capital, its advancement and flows. Anecdotally, the UK is renowned for the skills and experience of people who work on and for events. It is, however, difficult to quantify and evidence this because of the lack of data and certified standards which would kitemark this.

Since the last *BVEP Events are GREAT* report (2014), the industry has clearly identified the need to focus on talent in the industry. This was highlighted by C&IT's State of the Industry report 2015 and their article on what the solutions might be (Houghton, 2015). The challenge was identified as finding the talent and retaining that talent with loyalty to a particular company. It was noted that, once the economy had picked up and people had greater choice in employment, this would be harder to achieve. Solutions to this were offered such as getting the organisation culture meaningful and creating "a sense of family". Training and rewards were also seen as important to ensure that people had the opportunities to grow and prosper within the organisation.

This chapter goes beyond the individual and company level and focuses on all who make up the events industry. It begins with the national picture, on industry initiatives being undertaken by UK-wide organisations. It then goes on to explore what is known about the event workforce, from the identified occupations, their recruitment, pay and skills gaps. The third section summarises the existing learning and development structures in the UK. It outlines the education and training schemes offered by Apprenticeships, Higher Education and Continuing Professional Development (CPD). The final section briefly recognises some of the current and future challenges being faced, including Brexit, the gig economy, diversity and technology.

6.2 National picture

6.2.1 Industrial Strategy Sector Deals

The government initiative that has put human capital (people) on the national agenda has been the Industrial Strategy (2017). One of the pillars of the Industrial Strategy, that has been taken as a core theme in subsequent Sector Deals, is that of people. The Sector Deals of particular interest to the events industry are those for the Creative Industries (2018) and the Tourism Sector (2019). The Tourism Sector Deal sets out “to boost productivity, develop the skills of the UK workforce and support destinations to enhance their visitor offer” (2019, p.6). It is anticipated that events will play an integral part in all three of these aims and more detail for business events is the parallel DCMS Business Events Action Plan 2019-2025 that aims to “create new international business events, attract more existing events to the UK, grow our already successful events and retain those that might be thinking about leaving” (DCMS, 2019a, p.7) (and see also Chapter 4 of this report).

The government’s Industrial Strategy vision is “to create good jobs and greater earning power for all”. The Tourism Sector Deal, therefore, seeks “to attract, train and retain a more skilled workforce” (DCMS, 2019a, p.9) and to “develop a workforce with the skills it needs both now and in the future” (DCMS, 2019a, p.14). The actions proposed in the Sector Deal relate to tourism but can be adopted by the event industry as part of this. The aim is to increase the number of apprentices, to promote the benefits and opportunities of working in the industry and to deliver a mentoring programme. Much of this is already being undertaken by the events industry, as sections below will indicate. The Sector Deal gives validation to these actions and offers the opportunity of promoting what is already being achieved but also identifying what more can be done.

Being able to access data on the event workforce, through a review of the Standard Occupational Classification (SOC) codes would be of great benefit. This would also need to be supplemented by an annual survey of the workforce, where questions specifically about events would be appreciated. The workforce for different parts of the events industry may not mirror those of tourism and hospitality and may need to be a focus of attention e.g. the reliance or flexibility afforded freelance workers.

6.2.2 Events Industry Board

This chapter focuses upon the developments and proposed actions of a number of organisations and initiatives involved with enhancing the human capital of the events industry. The Events Industry Board (EIB) have recognised that the skills agenda is one of the ways that UK events can maintain their international GREAT status. A Talent Task Force (TTF) was set up, with representation from across the industry, to assess the skills, talent and human resource processes across the events industry. The aim was to produce an evidence-based report with key recommendations to government and industry. The main outcome was to assist the UK Events Industry attract, create and grow the talent and skills required to remain competitive on the global stage. The report was submitted to the Events Industry Board in 2019 and an outline of this is included in 6.2.5. The other bodies who have taken on a UK-wide interest in those working in the event industry are the Business Visits and Events Partnership (BVEP), the Institute of Event Management (IEM), the Association for Events Management Education (AEME) and the Events Management Apprenticeship Programme (EMAP). An update on their activities is incorporated in the following sections of this chapter.

6.2.3 Professionalisation

Since the last *Events are GREAT* report (2014), the move to a recognised profession has grown organically, but with the need for greater industry engagement and government recognition. An article in BVEP Connections (Jackson, 2016) outlined the challenges and opportunities in achieving recognition for events as a profession, and found that the path to professionalisation for the events industry is not an easy or short one. It acknowledged that progress had been made with a nascent Institute of Event Management, the National Occupational Standards for Events, the Trailblazer Event Apprenticeships, both at Level 3, and the revised Higher Education QAA *Subject Benchmark Statements for Events, Hospitality, Leisure, Sport and Tourism* (2016).

The main challenge has been event industry employers contributing to the debate around what they would expect of each level of attainment and demonstrating that qualifications and the accreditation of a professional body are something that they value. If the traditional model of professionalisation, that of a single professional institute with a common body of knowledge and set of qualifications, is not the way forward, then a viable alternative needs to be identified and accepted. A BVEP forum held in October 2016 voted in favour of greater understanding and coordination of industry qualifications and routes to professionalism as a first step in bringing the industry’s diverse skills and professional development requirements together. Its conclusion was that there existed much strength within the event workforce and that more should be done to centrally map and promote the many courses and certifications already being offered by the industry’s dedicated trade and professional bodies and existing education providers, especially the university degree courses.

Further research was undertaken with key people within the events industry being interviewed and a report, with proposals, presented to BVEP in June 2017. The aim of this study was to gauge whether there was an appetite for professionalisation itself and whether a professional body was the preferred model. Despite the intentions to discover a more contemporary and resilient model that offered professional status (Jackson, 2016), the results of the interviews reflected the characteristics of a traditional model of a profession. They identified that there were specialist skills, knowledge and activities pertinent to Events Management; the need for a way of educating and assessing this knowledge and skills; a code of conduct about the way we behave and do business and one body that brings all of this together, such as a Council or an Institute.

Overall, the consensus was that the events industry is progressing and developing well. There was, however, an underlying sense of frustration that greater successes could be achieved, more quickly, by collaboration. Professional status tends to focus on those at managerial and above levels; professionalism is concerned about all levels of the workforce, including volunteers and contract staff, acting professionally. The importance of professionalisation was clearly seen to be about improvement and development, not control and regulation.

There were a number of core contributing factors identified that are summarised below as the 3Ps.

People

The participants in the Professionalisation in Events research expressed very clearly the importance of people working in events. They also recognised, personally, the frustrations of their value not being acknowledged. This was mainly from

an external perspective when often the stereotype of their “only being a party planner” was quoted in a demeaning manner. Their stories also reflected the ad hoc way in which they had entered the industry and how they had found their way around and had learnt “on the job”. This might therefore explain why there is some resistance to some aspects of professionalisation and a negative reaction to the growing number of graduates in the workforce.

Policy

Policy was seen as related purely to that of the industry but with the government publishing the Industrial Strategy with People as a core column, then this could change. Since the original research, the Events Industry Board has been created and skills and talent added as a policy area. All of this should strengthen the argument for making the UK even stronger.

Professional Practice

Part of valuing and developing event-specific human capital is to recognise its worth through a professional structure and reward scheme. It is acknowledged that it is not the only way and that the Events Sector has grown to where it is today without one. The ES is maturing and part of this is about acknowledging that not everyone can be an entrepreneurial leader and that there are certain expectations of knowledge and expertise that can be taught and learnt through education and experience (the 2 Es). There have been a number of initiatives and events that have built up to where we currently stand. As with other industries, the reason for gaining professional status is not primarily about pay, or an increase in fees for clients, but about the legitimisation of what somebody accomplishes in their employment or the work that a business creates. It is about events being recognised as requiring specialist skills and knowledge and

being acknowledged as complex and risky. Yes, there will still be people who ‘fall into’ events and those that organise events as part of their voluntary leisure time. The same is true of finance. We do not all have accountants or financial advisors to organise our family affairs. We are more likely, however, to pay for a professional to organise a birthday party or a wedding.

BVEP agreed that a more socially constructed model would be the most desirable. This would require existing bodies and organisations to work more collaboratively to develop an event professional framework within which existing provision can be included (Jackson, 2017). Gaps could then be recognised as opportunities, and economies of scale achieved by working together. Overall, there is substantial support for the traditional components of professionalisation within the events industry. There is also a strong base of existing knowledge, qualifications, codes of practice and initiatives that can come together to bring the event industry together. The BVEP was established to facilitate the connection of the different parts of the events industry and professionalisation is seen as an opportunity that will demonstrate its unity. The concern is for the events industry’s identity as trustworthy and of the highest quality and for individuals to be valued and rewarded as professionals in their own right.

6.2.4 Institute of Event Management

One option for the development of professionalisation has been the Institute of Event Management (IEM – <https://iem.institute>), which was formed to “provide an opportunity for individuals who already work or wish to work in the Events Sector to gain professional recognition, and to enhance their profile, skills and knowledge”. The IEM Board, which itself has changed over recent years, has met on a number of occasions. Figure 6.1 illustrates the challenges

Figure 6.1 Institute of Event Management at The Meetings Show

Visualisation by the Creative Connections team (July 2015)

of gaining professional recognition from a gathering of visitors at The Meetings Show (July 2015). It demonstrates the issues that have been discussed and attempts made to address them. It has been the lack of funding and explicit recognition from industry and employers that have meant that limited progress has been made.

A renewed and invigorated Board is hoping to change this. An open workshop held in Liverpool in April 2019 resulted in the Board updating their purpose, mission, vision and values. Their mission is to Champion and Develop Event Professionals for the benefit of business, education, community and society. IEM's aim is to achieve this through providing opportunities for learning and development in an Institute which:

- recognises and protects the quality and integrity of the event management profession
- shares and values best practice and ethical standards in events management
- promotes and supports the UK and global events sector

- creates opportunities for event practitioners and academic research
- provides professional recognition, skills development and training
- offers a forum for sharing knowledge, insight and technical expertise
- creates a diverse Global Network of like-minded professionals.

They are hoping that a new business and action plan will eventually get IEM operational. Figure 6.2 outlines their roadmap for development and progress.

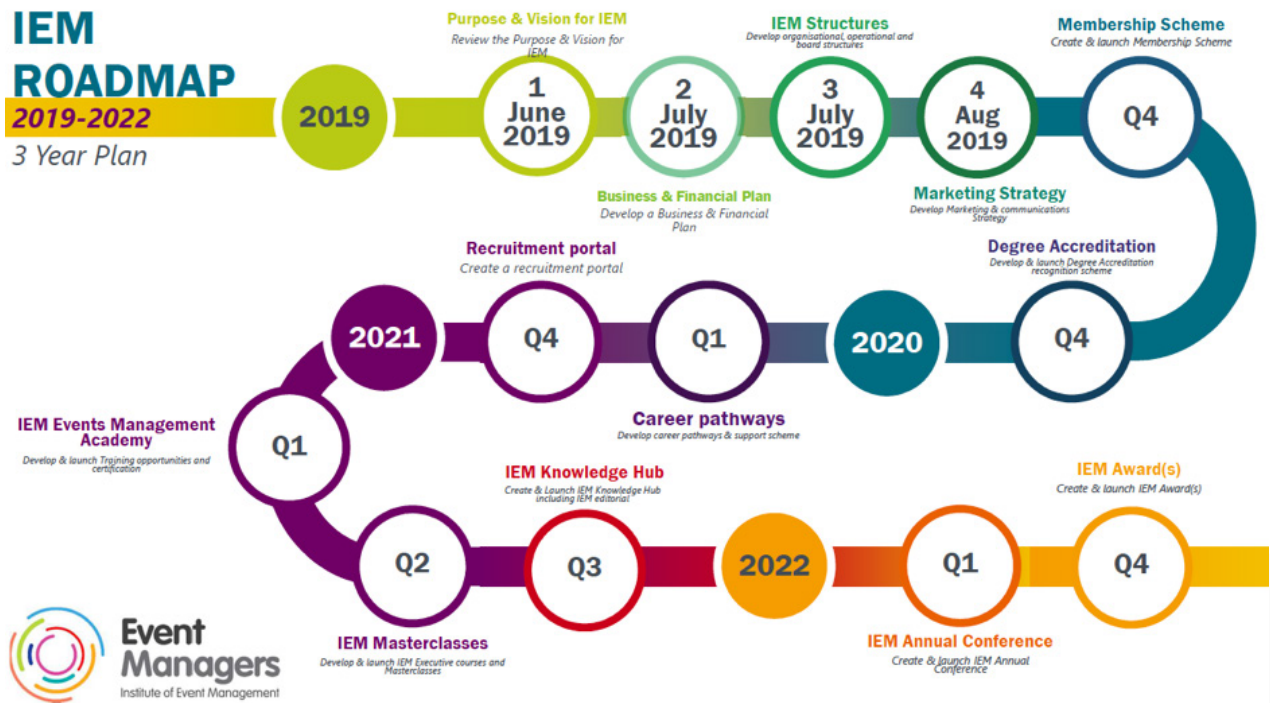
IEM are still faced with the challenge of being financially viable and the reliance on degree accreditation and individual memberships is built upon a number of unknown assumptions. Unless employers make IEM membership something they desire, or even require, when recruiting, it will be more difficult to make the case for membership. There is, however, a national push for recognition of skills and talent, as demonstrated by the government's

Industrial Strategy and approved Sector Deals for both the Creative Industries and Tourism.

6.2.5 Events Industry Board Talent Taskforce

Recognition of the importance of people to the event industry was demonstrated by the setting up of a Talent Taskforce by the Events Industry Board. The purpose of this was to assess the skills, talent and human resource processes across the events industry in order to produce an evidence-based report for ministers that would provide key recommendations to government, and the industry, to remain competitive on a global scale. The aim is to help the events industry develop a sustainable, competitive, highly skilled workforce, aligning with the Department for International Trade's "Attract, Create and Grow" vision for events and trade fairs in the UK. The Talent Taskforce's report has been accepted by the Events Industry Board and future action on the report's recommendations is being considered by organisations such as BVEP, EIM, EMAP and AEME.

Figure 6.2 Institute of Event Management Roadmap (presented to BVEP October 2019)



The TTF undertook a number of actions to gather information and the views of the industry, including an on-line survey, roundtable discussions, interviews and literature reviews. Data was limited because of the lack of Standard Industrial Classification (SIC) and Standard Occupational Classification (SOC) codes related to the events industry. Review of these is one of the recommendations with which the Department for Digital, Culture, Media and Sport (DCMS) has already agreed to assist.

The main findings and recommendations of the report (EIB TTF, 2019) can be summarised as:

- 61% of all employers reported skills gaps in their organisations. There is evidence of consistent skills gaps in specific skills
- There is no single voice and employers, education and training providers, the multiple associations and sub-sectors operate in silos, in competition

and, in some cases, against one another. And it appears that nobody is willing to invest. This paints an unhealthy picture for the future skills development in the UK events industry. There is, therefore, a need for a single body, with a government champion, to own the skills agenda and drive forward recommendations

- If employers don't recognise the value of employing talent from outside the events industry and take ownership of industry issues, the skills gap will only widen
- There are existing opportunities that industry needs to get behind, such as the apprenticeships and further and higher education courses
- The make-up of the industry with a predominance of SMEs and micro-businesses does make it difficult to operate as one. This is often used as an excuse for inaction
- The situation is exacerbated by the fact that we cannot track

any official employment data

- Visibility is a key theme across the report – visibility of the industry to government, sector bodies, colleges, schools, parents. Visibility of training and education opportunities. Visibility of ownership of industry issues. These are all things that can be solved by working together.

The report includes the results of the 2018 on-line survey and a list of several proposed actions for government, industry and academia. The taskforce, and even the Events Industry Board, do not, of themselves, have the power or funding for action. One of the main findings, that of having an overarching organisation, such as a Skills Board, may be possible if funding support emerges from the Sector Deals. This would assist in filling the gap created when People 1st ceased to be the Sector Skills organisation for events (and other allied sectors). Other sectors, such as hospitality, have other organisations such as UKHospitality, the Institute

of Hospitality and the Hospitality Guild to cover this role. Events only have a partnership of bodies through BVEP, the Association for Events Management Education (mainly a higher education provider volunteer organisation) and the fledgling Institute of Event Management.

6.3 Event workforce

6.3.1 Occupations

As much as there are thousands of events, there are similar numbers of types of jobs and roles available. The fragmentation of the industry has often been mentioned but one of the limitations this brings is the lack of standardisation in the titles and expectations of job roles. The previously available UKSkills Passport has been subsumed into the Hospitality Guild and the author, People 1st, is no longer a Sector Skills Council for events. It is anticipated that the emerging Sector Deals for Tourism and the Creative Industries may well fill the gap, but it is imperative that the events sector is able to contribute to these, otherwise they will fall between the two.

The lack of SICs and SOCs means that the lack of consistency of nomenclature is reinforced by the limited data available on how many jobs there are. The only SIC codes available that are explicitly related are: 56.21 - event catering activities; 82.30/1 - activities of exhibition and fair organisers; and 82.30/2 - activities of conference organisers (Table 6.1). For SOC codes, the one code that is event-related is 3546 - conference and exhibition managers (Table 6.2).

We, however, do not have data for events because events are not recognised as an industry in the ONS (or international) Standard Industry Classification Codes (SIC2007), apart from those identified in Table 6.1.

The workforce, in terms of jobs and pay, is not measured because there

Table 6.1 Event-related Standard Industrial Classification Codes (ONS, 2019)

Standard Industrial Classification Codes (2007)	SIC2007 to 2 digits	SIC2007 to 3 digits	SIC2007 to 4/5 digits	Title
I – Accommodation and food service activities	56 Food and beverage service activities	56.2 Event catering and other food service activities	56.21	Event catering activities
N – Administrative and support service activities	82 Office administrative, office support and other business support activities	82.3 Organisation of conventions and trade shows	82.30/1	Activities of exhibition and fair organisers
			82.30/2	Activities of conference organisers
R – Arts, entertainment and recreation	90 Creative, arts and entertainment activities	90	90.01	Performing arts
	93 Sports activities and amusement and recreation activities	93.2 Amusement and recreation activities	93.21	Activities of amusement parks and theme parks
93.29			Other amusement and recreation activities	

Table 6.2 Event-related Standard Occupational Classification Codes, with employment numbers (ONS, 2019)

SOC codes (2010)	SOC to 3 digits	SOC to 4 digits Title	Additional descriptor which is event related	Employed April-June 2018 at 4 digits
3 - Associate professional and technical occupations	342 - Design occupations	3421 - Graphic designers	Designer, exhibition	110,000
	354 - Sales, marketing and related associate professionals	3546 - Conference and exhibition managers and organisers		82,000
4 - Administrative and secretarial occupations	413 - Administrative occupations - records	4131 - Records clerks and assistants	Administrator, events and conferences	112,000
	415 - Other administrative occupations	4159 - Other administrative occupations n.e.c	Assistant, conference	813,000
5 - Skilled trades occupations	531 - Construction and building trades	5315 - Carpenters and joiners	Erector, exhibition	226,000

are very few Standard Occupational Classification Codes (SOC2010) which can be identified as specifically working in events. Those that could be used are included in Table 6.2. Many of these are hidden in the detailed descriptor of the SOC title and so not recognised as such by employers when completing the Labour Force Survey which is the main source for this data. The number employed, as indicated by the latest quarter in the final column of the table, cannot really be used because of the lack of mutual exclusivity for event roles, other than 3546, conference and exhibition managers and organisers.

Managers, directors and senior officials are generically recorded separately in Section 1 of the SIC2010 codes. These are recognised by industry in some areas e.g. transport, protective services. 122 covers Managers and proprietors in hospitality and leisure services, which could be added to and include event managers. Section 2 are professional occupations and 3, associate professional and technical occupations. This includes industries such as IT, architecture, teaching, medical, finance, architects, welfare. Some event-related occupations are identified in the third section.

6.3.2 Recruitment and vacancies

People enter the event workforce through many routes, and into different levels. The anecdote is that many people just ‘fall into’ events and enjoy the buzz of what it offers and stay. Many, however, are unsure of what the opportunities and potential may be. As a result of experiences like this, Event First Steps (<https://www.eventfirststeps.com/>) was launched; a voluntary network of events offering advice and guidance for those who have just entered, or are about to enter, work in the events sector.

Social media and networks are becoming ever more powerful in

Figure 6.3 Event Manager Salaries

226 Salaries, updated 4 Nov 2019

Average Base Pay
£31,748/yr

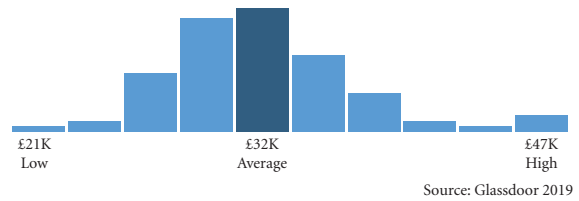


Figure 6.4 Event Manager Salary

Average Salary for an Event Manager in UK

£26,416/yr £1,843 bonus | £4,793 Commission | £1,100 Profit Sharing

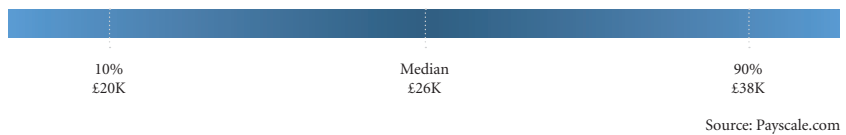


Figure 6.5 UK Event Salaries

Title	Avg. Salary (3 years exp)*	Commission	Profit Sharing	Avg Bonus
Event Coordinator	£20,339	£750	£300	£989
Event Manager	£25,889	£3,500	£1,100	£1,593
Event Specialist	Not available			
Director of Events	£46,193	£9,850	£3,000	£7,059

Source: EventMB

the path to recruitment. Existing recruitment organisations are utilising this to their advantage. LinkedIn, as the more business and professional media site, has jobs that can be identified under ‘Event Manager’ and there are specialist organisations and people that focus on event recruitment e.g. Albany (<https://www.albany-appointments.co.uk/>); CastleBell (<https://castlebell.co.uk/castlebell>); ESP recruitment (<https://www.esprecruitment.co.uk/>); Event Talent Agency (<https://event-talent.co.uk/>); Live Recruitment (<https://www.live-recruitment.co.uk/>).

It was identified that, between 2016-2018, respondents to the EIB TTF survey were responsible for recruiting approximately 800 graduates, college leavers, school leavers and apprentices. Graduates were the most common entry point,

with approximately 500 of the total number. The EIB TTF (2019) survey also discovered that 37% of vacancies exist at entry level, 40% at mid-level and 23% at senior/management level.

6.3.3 Recognition and reward

There are also a number of industry awards that recognise individual successes and future talent (e.g. EN 30 under thirty <https://en30under30.co.uk/>; C&IT A list <https://www.citmagazine.com/alist2019>). The main focus of reward is, however, pay and conditions of those working in the industry.

There are a number of reports undertaken by different recruitment agencies and trade and professional bodies on the types of jobs and salaries (ESSA, 2018; EventMB Studio Team, 2019; HBAA, 2018; PCMA – Convene Salary Survey).

Recruitment sites also give an indication of salary ranges by job (e.g. Glassdoor, 2019).

Figures 6.3, 6.4 and 6.5 illustrate the variation in average salary of event managers.

EventMB undertook research to compare advertised salary scales for event jobs in the USA, UK and Australia. Their results for different post title in the UK are illustrated in Figure 6.5.

The graduate website, prospects.ac.uk (AGCAS, 2018) identifies figures that are between these for an event manager. They say that:

- Salaries for entry-level roles typically range from £18,000 to £22,000.
- With experience, you can expect to earn between £22,000 and £25,000.
- Salaries for managers can start at around £33,000, rising to in excess of £40,000 for senior managers or directors with extensive experience and an impressive track record

The payscale.com website identifies a number of interesting results from its survey and so they are included here. These results are not necessarily surprising but validate anecdotal information and give a salary figure to skills (Figures 6.6 and 6.7), experience (Figures 6.8 and 6.9) and location (Figures 6.10 and 6.11).

Figure 6.9 illustrates the rise in salary but also the potential bottle-neck at mid-career levels. This supports what was discovered in the EIB TTF survey.

Figure 6.10 identifies the percentage number of event managers in each level of their career, based on years of experience. 77.3% of event managers are in the early to mid-career stages. This either indicates a flat structure

Figure 6.6 Event Manager Skills

Different skills can affect your salary. Below are the most popular skills and their effect on salary.

Contract Negotiation	▲ 15%	Event Planning	▼ 1%
Budget Management	▲ 9%	People Management	▼ 5%
Project Management	▲ 9%	Customer Services	▼ 6%
Event Management	▲ 1%	Sales	▼ 16%
Logistics	▲ 1%	Operations Management	▼ 18%

Source: Payscale.com 2019

Figure 6.7 Event Manager Skill Salaries

Avg. Salary	Popularity
Event Management £26,655	● ● ● ● ● ● 597 responses
Event Planning £26,222	● ● ● ● ● ● 395 responses
Budget Management £28,844	● ● ● ● ● ● 308 responses
Project Management £28,729	● ● ● ● ● ● 273 responses
Customer Service £24,788	● ● ● ● ● ● 58 responses

Skills in Event Management, Budget Management and Project Management are correlated to pay that is above average. Skills that pay less than market rate include Customer Service and Event Planning.

Source: Payscale.com 2019

Figure 6.8 Event Manager Experience Impact on Salaries

Years of experience has an effect on salary.

Late Career	▲ 29%
Experienced	▲ 18%
Mid Career	▲ 14%
Early Career	▼ 7%
Entry Level	▼ 22%

Source: Payscale.com 2019

within organisations or a limit to their potential for progression. It must be noted that with the predominance of SMEs and even micro-organisations, this may well reflect that there are not five levels of career progression. Data collected in the Labour Force Survey would give us a clearer picture, but there would need to be relevant SIC and SOC codes to do this. It is anticipated that a review of these (SOCs) would be supported by the DCMS, as indicated by their response to the EIB TTF report (2019).

As expected, salary varies depending on where the job is based.

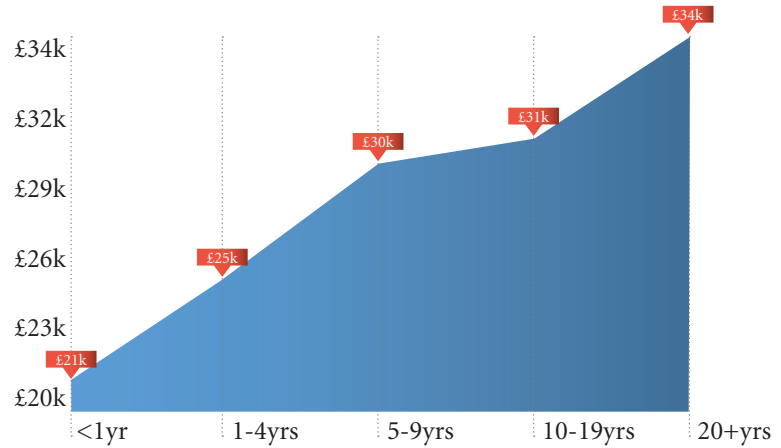
People do not enter a job or a career just on salary or salary potential. As the HBAA salary benchmarking report, undertaken by Rubicon, states: “We have seen in many cases even the best salaries do not ensure an easy path to filling roles. Consideration should be given to reputation, location, environment, mentoring and facilitating career development which needs to work in alignment with initial financial temptation.” The EIB TTF research discovered that 64% of all entry level recruits leave the company within 2 years of entry. This indicates a higher lack of retention than employment as a whole. Attention has been given to some of the issues that require attention in the work environment, including the long hours and the need for a work-life balance (C&IT, 2019; EventMB, 2019). The changing nature of the workforce has been noted and that “Purpose is super important to millennials, as is the sort of projects and clients they work on” (Harwood, 2017).

6.3.4 Skill gaps

The Events Industry Board Talent Taskforce survey (EIB TTF) identified a shortage in event-specific skills within the workforce. There were five consistent areas where these shortages existed: sales and business development, project

Figure 6.9 Event Manager Skills

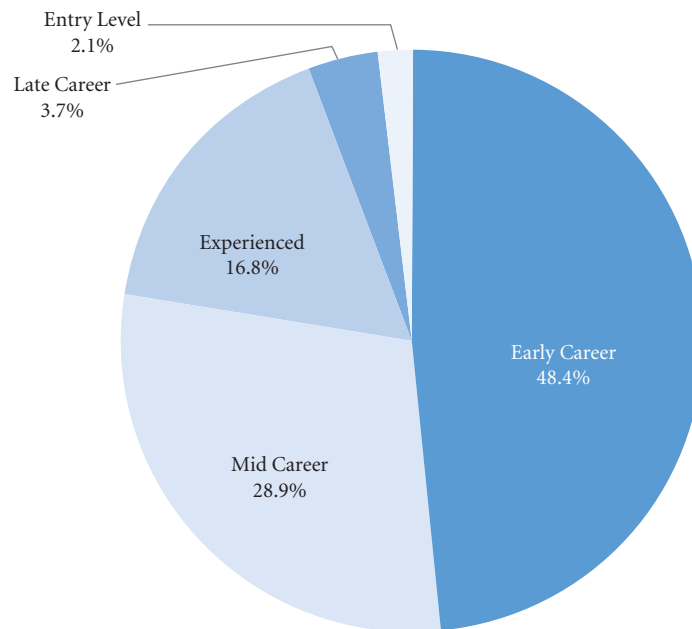
Pay by experience level for Event Manager



An entry-level event manager with less than 1 year experience can expect to earn an average total compensation (includes tips, bonus, and overtime pay) of £20,591 based on 18 salaries. An early career Event Manager with 1-4 years of experience earns an average total compensation of £24,640 based on 417 salaries. A mid-career Event Manager with 5-9 years of experience and an average total compensation of £30,235 based on 249 salaries. An experienced Event Manager with 10-19 years of experience earns an average total compensation of £31,230 based on 145 salaries. In their late career (20 years and higher), employees earn an average total compensation of £33,960.

Source: Payscale.com 2019

Figure 6.10 Percentage of Event Managers in stages of experience



Source: Payscale.com 2019

management, creatives, technical and client handling. 54% of respondents believed that the majority of the absence of these skills sits at mid-level within their businesses. The report explains that “it could be interpreted that this lack of skills at mid-level is a result of entry level

employees not filtering through to mid-level and those that do may not have received the necessary training, nurturing, opportunities to fill this gap once they have spent a certain period of time in their roles” (EIB TTF, p.5, 2019).

The skills gaps that the EIB TTF survey identified were not necessarily event-specific skills. When asked in what types of roles skills shortages were identified, 71% of event organisers and 69% of event agencies identified sales and business development as their highest areas. Project management was also identified by 48% of organisers and agencies, and 56% of suppliers. Other skills gaps identified were: 43% in creative for organisers and technical skills for suppliers and venues.

This follows a People 1st 2016 report, where the skills that were missing in the events industry were largely interpersonal and employability skills. Specifically, ability to manage own time and prioritise own tasks at 66%, customer handling skills at 61%, team working at 56%, sales skills at 46% and specialist skills or knowledge that is specifically ranked at 47%.

The variations in the findings in the EIB TTF (2019) and People 1st (2016) reports were mainly because the skills identified in the survey questionnaires were different. They also do not indicate that the events industry is lacking skills but that it recognises that improvements can be made. Specific skills in specialist areas have been identified as an issue elsewhere in the industry. The number of qualified Security Industry Authority licensed staff has been a concern (UKCMA, 2017) and the impacts of Brexit on hospitality staff.

What the results indicate is that businesses need to invest more in education and training to fill any gaps that they may have. Investment in hiring and training should not be seen as the only cost to a business. Consideration should also be given to what potential income is lost as a result of these gaps. The EIB TTF undertook a supplementary survey to cost the impact that vacancy and

Figure 6.11 Event Manager Pay Difference by Location

London, England: London	▲ 14%
Manchester, England: Manchester	▲ 2%
Brighton, England: East Sussex	▼ 5%
Oxford, England: Oxfordshire	▼ 8%
Bristol, England: Bristol	▼ 17%
Edinburgh, Scotland: Edinburgh	▼ 19%
Glasgow, Scotland: Glasgow	▼ 19%

Employees with Event Manager in their job title in London, England: London earn an average of 13.5% more than the national average. These job titles also find higher than average salaries in Manchester, England: Manchester (2.2% more). The lowest salaries can be found in Glasgow, Scotland: Glasgow (19.1% less), Edinburgh, Scotland: Edinburgh (18.7% less) and Bristol, England: Bristol (16.8% less).

Source: Payscale.com 2019

skills gaps have on the industry. This amounted to between £60-100 million lost revenue.

The impacts were most heavily felt on:

- Mid-Level Sales / Business Development roles for Organisers and Suppliers
- Mid-Level Project Management roles for Agencies
- Technical roles at Venues at a wide range of levels

“A combination of high workload, low pay and most importantly no widely accepted accreditation schemes result in insufficient incentives for the necessary volume and quality staff to stay in the industry, and progress into roles with greater responsibility, leading to the gaps found in the survey” (EIB TTF, p.67, 2019). Data gathered in the commercial impact survey (EIB TTF) showed that the events industry does not suffer from longer recruitment times than the UK as a whole, and in fact recruits quicker than the average (XpertHR, 2019).

6.4 Learning and Development

6.4.1 Education and training structures

An integral part of human capital is the recognition that people need to

be invested in, with new skills and knowledge created and implemented to improve performance and reward. This is often achieved through more formal education and training activities. One of the issues around education and training is the misconception that they are interchangeable. Or that they may be thought of as binary, where they are seen as polar opposites of each other, as is the case when people argue that experience is more important than education. All are important in their own way and at different times, for a variety of reasons. Too often they are juxtaposed as one or the other, but they are increasingly being combined or being seen as complementary.

Education, at compulsory (school/college) levels and then through Further and Higher Education providers, comes under the Department for Education remit. The non-governmental organisations, which fund and oversee these, have been going through big changes with the creation of the new Office for Students established in 2018 and a review of the funding mechanisms expected. Training and continuous professional development (CPD) policy and practice are also covered by the Department for Education but providers are mainly private organisations. They are still, however, governed by central bodies

which oversee development and quality such as the Institute for Apprenticeships (<https://www.instituteforapprenticeships.org/>).

The EIB TTF survey discovered that the group with the lowest levels of event-specific qualifications at entry, mid and leadership levels within their businesses were the event organisers. The highest levels sat with the suppliers. On the whole the figures were quite low. 70% of respondents had less than 25% of their entry level work force entering their business with event-specific qualifications.

The UK has a number of qualification frameworks that have been developed to increase harmony across England, Wales and Northern Ireland with Scotland (and Europe). The Regulated Qualification Framework (England and Northern Ireland) is one of these and is applying this to events according to formal educational qualifications and training opportunities. Table 6.4 gives some examples.

Much of the emphasis on entry into employment in the industry is through the educational channels that are available (Table 6.4). These have continued to grow and expand across the UK. There are now opportunities for events education at all national qualification framework levels, from level 3 apprenticeship to level 8, where there are more PhDs being gained in topics related to events. The dominant level is still that of graduates, who reach level 6. UK has a successful higher education provision in events.

UK Higher Education providers (public and private) dominate the event offering with some private providers. Training and CPD are offered through trade and professional bodies. In events specifically, there is the Institute of Event Management that has still to become operational. The Event

Table 6.3 Types of learning development

	Description	Sources/examples
Education	More formalised, external and in-depth learning. Mainly cognitive with some practice	Undergraduate and postgraduate degree courses e.g. AEME members (www.aeme.org). There are some joint industry and Higher Education provider courses e.g. NOEA and University of Derby Safety Diploma (also TechIOSH); A Greener Festival Assessor Training with Falmouth University
Training	Shorter-term activities, which are more practically focused. Many of the professional bodies which are offering certification are based in the USA	Professional and trade bodies offer certificated courses e.g. CMP (https://www.eventscouncil.org/CMP/About-CMP), CFEE (https://www.ifea.com/p/education/cfeecertification), CIS (https://www.siteglobal.com/page/certification), CEM (https://www.iaee.com/cem/)
Other activities	Many of the formalised activities that support personal and organisational development are both educational and training. Some of the current developments e.g. Event Apprenticeships, do this	Most professional and trade bodies offer short sessions on specific topics e.g. HBAA Mental Health First Aider training; EVCOM preparing for changes to IR35; PSA Safety Passports; AEO Facetime exhibitor and data security

Table 6.4 Event-related education and training opportunities by level

Levels	Education	Training/CPD
1-3 GCSE to A-level	T levels are being created but events are not yet part of this https://www.gov.uk/government/publications/introduction-of-t-levels/introduction-of-t-levels Overseen by the Department for Education and Office of Qualifications and Examinations Regulation (Ofqual https://www.gov.uk/government/organisations/ofqual) in England	Apprenticeships: Event assistant, live event rigger, live event technician https://www.instituteforapprenticeships.org/ Event Safety Passports are available at level 2 from a number of providers
4-6 University	Undergraduate degrees with events in their title come under the Subject Benchmark Statement for Events, Hospitality, Leisure, Sport & Tourism Overseen by OfS (Office for Students https://www.officeforstudents.org.uk/) and QAA (the Quality Assurance Agency for Higher Education https://www.qaa.ac.uk/en/home)	Some private providers offer alternatives. These may be accredited through professional bodies e.g. Event Academy and the Chartered Institute of Marketing (https://eventacademy.com/)
7-8 Post-graduate	Postgraduate taught event programmes and those undertaking a research degree with events as a topic of investigation	There is discussion about developing a Level 7 Apprenticeship offer

(Sources: <https://www.gov.uk/what-different-qualification-levels-mean/list-of-qualification-levels>; https://eacea.ec.europa.eu/national-policies/eurydice/content/national-qualifications-framework-93_en). See <https://scqf.org.uk/interactive-framework/> for Scottish Qualification Framework.)

Academy, for example, have aligned themselves with the Chartered Institute of Marketing to offer some form of accreditation of their courses. Other private providers have aligned themselves with the Higher Education sector, whether Further or Higher, to gain some form of validation of their courses e.g. The Backstage Academy's courses are validated to degree level by the University of Bolton. UK Universities also align themselves with industry-related courses e.g. Falmouth University deliver the 'A Greener Festival Assessor' training; the University of Derby deliver the Event Safety Management Diploma in partnership with NOEA and Edinburgh Napier University credits the Mind over Matter Event Management and Crowded Space Programmes.

6.4.2 Apprenticeships

There are a number of different apprenticeship opportunities that support the events industry (Table 6.5). These are not always apparent because the Event Assistant is under the Sales, marketing and procurement route and the Rigger and Technician roles under the Creative and design route. Catering & Hospitality have their own route but events do not.

The development of the Trailblazer Event Management Apprenticeship Programme (EMAP <http://getintoevents.org.uk/>) established the level 3 Event Assistant Apprenticeship, which has recruited over 100 apprentices and created a Board to oversee its progress. The intention is to review level 3 and to create and offer levels 4, 6 and 7. A meeting on 8 July 2019 (Fullard, 2019) discussed the benefits and challenges of doing this.

The benefits can be summarised as:

- designed by professionals in the industry for the industry;

Table 6.5 Apprenticeship roles related to events (2019)

Apprenticeship role	Link to further details of role profile, knowledge, skills, behaviours
Event Assistant (ST0168)	https://www.instituteforapprenticeships.org/apprenticeship-standards/event-assistant/
Live Event Rigger (ST0256)	https://www.instituteforapprenticeships.org/apprenticeship-standards/live-event-rigger/
Live Event Technician (ST0255)	https://www.instituteforapprenticeships.org/apprenticeship-standards/live-event-technician/
Hospitality Supervisor, includes Event Supervisor (ST0230):	https://www.instituteforapprenticeships.org/apprenticeship-standards/hospitality-supervisor/

- training and experience to help start a career in the events industry;
- earning whilst learning;
- opportunity to widen the diversity of those employed in the events industry;
- employers can take on apprentices with ease – tailoring the training and job to meet the needs of their company as well as receiving government funding to help pay for the training and other costs.

The challenges as:

- getting employers to move from being interested to actually taking on apprentices;
- achieving sponsorship for the activities of EMAP;
- potential duplication with existing undergraduate and postgraduate degrees at levels 4-7;
- reliance on pro-bono support of activities, such as Board membership and the working parties established to drive forward the programme with industry.

As with other developments in this field, the political uncertainty going forward does not encourage engagement with such initiatives. Generally, there is a struggle for

uptake of apprenticeships despite the apprenticeship levy, even from more traditional industries (Evans and Stubbington, 2018). Whether future governments support apprenticeships in the same way is unknown. The principle of learning on the job in such a way is what industry says is important to them and so any changes to the way that apprenticeships are funded should have limited impact on their uptake.

6.4.3 Higher Education

Levels 4-8 of the educational structure are currently dominated by Higher Education providers in the UK. Events education has been offered in UK Universities since the early 1990s. Providers came together to create the Association for Events Management Education (AEME) in 2004. AEME were instrumental in the creation of a Quality Assurance Agency subject benchmark statement for degree courses with events in their title. Events was first recognised as a distinct subject area from Hospitality, Leisure, Sport and Tourism in 2008 and the content and delivery of courses was reviewed and rewritten in 2016. Industry and education providers were involved in the panel and consultation process. Each course offered by a UK Higher education provider should consult and defend its programmes against the benchmark statement. The statements are quite broad in coverage and description to ensure

that they are future-proof and to avoid becoming dated by direct reference to organisations, sources of reference or processes.

The main content of relevance to the comments made by industry is that courses should include practice and that theories should be applied. The QAA Subject Benchmark Statement (QAA SBS) states that “a particular feature of programmes in this area is the inclusion, as integral significant elements, of industry placements, work-related or work-based learning, as well as other forms of delivery which involve collaboration between the higher education provider and relevant practitioners and employers. This reflects the value of practical experience in developing the knowledge, skills and behaviours which graduates need to contribute to the professions to which they progress, which are integrated with theoretical understanding and skills in critical analysis” (QAA, 2016, p.14).

The QAA Subject Benchmark Statements for courses broadly concerned with Events outline what Level 6 looks like in the following descriptors:

3.2 As events have come to be a major force for personal, business, community, destination and nation-building reasons, the study of events has become increasingly significant. The subject area has emerged as a dynamic area of study, employing creativity in the curriculum, and is supported by a cogent critical research and publication base. Alongside this, there is a growing understanding of the knowledge base for events education and increasing recognition of events as a subject internationally.

3.3 Events programmes draw upon academic areas such as Psychology, Design, Law, Geography, Sociology and Political Sciences, and are by nature multidisciplinary and interdisciplinary. The study of events

may also be offered as an integrated pathway through programmes in business and management or design and production, while retaining the distinctive characteristics described in this benchmark statement. Where students study in these contexts, they apply their learning to events specifically.

3.4 Events programmes characterise the nature of events as planned, temporary, short-term, unique activities designed to meet cultural, economic, social, political, leisure, life-cycle, marketing or business needs. The nature of events means that specific expertise is required to manage temporary resources such as sub-contractors and volunteer workforces. Thinking and working creatively is at the heart of this process and forms an integral part of any programme, with creative skills and aptitudes developed and assessed. It is necessary to have knowledge of procurement processes and working through agencies and clients to plan, coordinate and deliver safe, sustainable, rewarding and, often, creative experiences. Moreover, as event sectors have themselves matured, a fundamentally greater strategic perspective is required in terms of both policy and practice. Graduates need to be able to independently question why events are provided as well as the best methods to do so. Events programmes therefore need to explore a range of conceptual and theoretical areas, alongside developing professional skills, in order to meet the academic and employability needs of graduates, the events industry and the events subject area.

3.5 Events programmes often involve the study of the:

- consideration of the concepts and characteristics of events as an area of academic and applied study
- nature of events and the

structure, composition and management of the events industry, to include the commercial, public and third sector involvement in events

- consideration of international, cultural and global environment contexts
- psychology of the event consumer and client and resulting issues such as the inclusion and exclusion of certain groups, management of crowds and academic concepts such as co-creation
- sensory conception, design and staging of event experiences and eventscapes
- technical, administration, planning, operations, health and safety risk and security assessment and mitigation, and contingency planning, resilience, project and risk management involved in the provision of events planning
- financial management and human resource requirements for all organisations and stages of event delivery, including sources of funding
- various legal, environmental and ethical requirements necessary for successful events, incorporating international reference points and key policy documents
- marketing of events and the relationship between events and destination management and brands
- business events, festivals, popular culture and events in urban/rural spaces
- the use of technology and digital platforms in events and the nature of hybrid events and activation in current and future environments
- relationship with the built and natural environments, land-use change, construction and spatial planning, transport planning, architecture and

- infrastructure developments
- role of events in national and international economic development and regeneration
- critical review of the policy, strategy, impact and legacy of events, including historical and future investigations
- career development and learning opportunities in the events sector.

3.6 Curriculum content may include: the events industry, organisational behaviour, event environment, live events management, event operations, project management, applied technology, management support systems, event design, theming, hospitality, event risk management, crowd management, security, event production, support services, event resource management, volunteer management, human resource management, event marketing, public relations, consumer behaviour, sponsorship, venue and facilities management, safety and security, strategic management, creativity, financial management, fundraising, economics, small business management, entrepreneurship, leadership, event law and licensing, health and safety, administration, event policy, cultural studies, globalisation, mega-events and spectacle, evaluation, critical event studies, research methods and market research.

Source: QAA Subject Benchmark Statement

Higher Education in the UK is robustly controlled through the national quality systems, such as the requirement that new and periodically reviewed courses go through a process of external validation. Most of these processes include industry representatives as well as academic experts in the subject. The documentation supporting the process also requires

that the awarding education provider identifies how the course(s) being reviewed meet the QAA Subject Benchmark Statements. There are other generic content details that relate to all subjects across Events, Hospitality, Leisure, Sport and Tourism, available in the document available on the QAA website. The following is an extract from the document that details what an honours graduate (level 6) of events should be able to demonstrate:

6.2 An honours graduate in Events is able to critically analyse and evaluate the concepts and defining characteristics of Events as an area of academic and applied study, including being able to:

i explain, interpret and challenge theories and concepts which are used to understand the origin, purpose, meanings and development of events from a range of critical perspectives

ii display an insight into the structure of event providers and their sectors, and analyse the political, technological, social, environmental and economic factors which affect, or impact upon, the supply of, and demand for, events

iii analyse and reflect on the different cultural and business concepts, intercultural and international dimensions of events

iv demonstrate a critical awareness and understanding of how core values, for example, ethics, sustainability, creativity, strategy, and continuous improvement, relate to, and are reflected in, events.

6.3 An honours graduate is able to demonstrate a range of professional event planning and management knowledge and skills, including being able to:

i demonstrate a critical awareness and understanding of appropriate domains including administration, design, operations, marketing and

risk, and how they apply to the phases of events, such as initiation, planning, staging of the event and closure and legacy

ii operate and effectively manage resources, including human (paid or volunteer), financial, venue, and subcontracted and technical resources and the development of return on investment models

iii display critical knowledge, understanding and application of risk management and the legal, ethical and regulatory frameworks that affect event management including health and safety considerations and crowd management

iv plan, project manage, produce, stage, analyse and evaluate events, including the procurement of support service provision, the application of new technologies and logistics

v design creative events, including the programming of spectacle, exhibition, ritual, and performance

vi engage with, contribute to, and produce events based on an acquisition and understanding of appropriate vocabularies, skills, working methods and professional business communications.

6.4 An honours graduate is able to recognise and value the centrality of the attendee and/or client and meet and respond to their needs and expectations, including being able to:

i analyse the nature, characteristics, needs and expectations of different consumers through applying consumer behaviour theories and concepts and socio-cultural theories

ii generate creative ideas/concepts, proposals, pitches and solutions to offer experiences that meet differing needs

iii analyse and evaluate the quality of the event experience and its impact on the event consumer and/or client

and the wider organisation and the practices of co-production and co-creation

iv evaluate the importance of cultural and other diversities in developing access to, and participation in, events by specific target groups

v demonstrate an understanding of the ways in which attendees behave at events and within the venue and surrounding destination, in particular crowd management.

6.5 An honours graduate is able to use, and understand the impact of, rationales, sources and assumptions embedded in policy, planning and delivery mechanisms in an events context, including being able to:

i evaluate the legacy and impacts of events in social, economic, environmental, political, cultural, technological and other terms

ii appreciate the complexities of future scenario planning and the ability to forecast and envisage the future for events through the impact of technological, social, environmental, political and economic changes

iii appreciate the ethical and sustainability issues associated with the financial support, operation and development of events

iv write and critique event plans, portfolios and event strategies, which recognise and meet the needs of specific stakeholders

v critically reflect upon the role of those organisations and structures charged with a responsibility for the promotion of, or the training of, practitioners in events

vi demonstrate a critical awareness and appreciation of existing and emerging standards, policies, initiatives, frameworks and contemporary issues.

Source: QAA Subject Benchmark Statement

The UK is fortunate to have a thriving Higher Education sector of quality. For 2020 starters, UCAS (November 2019) listed 425 undergraduate Event Management courses offered by 105 providers and 54 postgraduate courses by 23 providers. This is an inflated figure because the list includes different types of named pathways at the same university where they offer different combinations of modules. There are also a variety of courses, some specialising in different types of events (e.g. sport events), some are combinations (e.g. with Business or Tourism and Hospitality) or different stages of the process (e.g. production). It also lists courses where there may just be modules in events management. Providers include colleges as well as universities, the majority of whom are post-92 universities. The main 45 Higher Education providers are members of AEME, whose objectives are:

- a. To provide a voice for events education
- b. To support and raise the profile of the events discipline through the sharing of education and best practice
- c. To provide a discussion forum for issues affecting events education and industry
- d. To establish communication opportunities between events stakeholders
- e. To encourage the development and dissemination of the events management body of knowledge
- f. To support, undertake and disseminate research
- g. To encourage international exchange of ideas and best practice in events

Data is collected in the UK on students and graduates by the Higher Education Statistics Agency (HESA <https://www.hesa.ac.uk/>). The headline data is now available

publicly and the following figures have been taken from the JACS code N820 (JACS = Joint Academic Coding of Subjects). N relates to those courses that are predominantly management in focus, coming under Business and Administrative Studies. It is acknowledged that there are more courses that offer event degrees, such as those linked to other subject areas such as Tourism & Events, or specialist focus outside of JACS code N e.g. JACS code W covers Creative Arts and Design, which are not included in these figures.

To give a longer trajectory, a previous publication (ATHE, 2012) gave the total number of students in N820 in 2007/8 of 3,365; 2008/09 of 4,405; 2009/10 of 5,770 and 2010/11 of 6,660.

Data for graduate recruitment is collected 6 months after graduation and recorded for each course (HESA Destinations of Leavers from Higher Education) and publicly available via unistats.ac.uk. Taking 60 universities, the average salary for 2016/17 was £20,000 (DLHE/LS). These are now being collected longitudinally but for the broader subject area including hospitality, tourism, sport management and shows £19,000. This data is to become the Graduate Outcomes (<https://www.graduateoutcomes.ac.uk/>) survey which asks 15 months after graduation. The first results will be published in 2020 but are also linked to SIC 2007 and SOC 2010 codes, so again, events will not be recognisable specifically.

There still appears to be a myth being shared that HE providers do not work with industry. Unlike other types of degrees this is not the case. There are a number of good examples of ways in which employers and businesses are working with education providers, whether through open-days, guest visits, projects, research and employment through work placements or on

graduation. Despite there being no specific event graduate schemes, most graduates (90%) do enter the broader event sector, whether in an agency, venue, production, supplier or internal departments which organise events (DLHE 2018). The Talent Task Force survey showed that over 60% of respondents recruited from universities, less so from colleges and schools (EIB TTF, 2019).

6.4.4 Training and Continuing Professional Development (CPD)

The absence of an explicit career structure to working in events is one of the reasons that Event First Steps was created and also highlights the fragmented nature of what is available once people are working in the sector. It is understandable that organisations and businesses see that investment in training could be lost if people leave the company, rather than the benefit this offers the organisation in the short term, the individual and the sector as a whole. There are initiatives that offer advice and guidance to potential career opportunities and development e.g. Hospitality Guild Career Map, AEO talent hub (<https://www.aeo.org.uk/what-we-do/talent-management/talent-hub>).

There is a myriad of opportunities but a lack of direction. The EIB TTF survey results showed that c.50% of respondents identified a lack of funds and/or an absence of specific training courses available to them as a reason for not providing training or more training.

There are a number of practical courses on offer to those working in events, some of which are also provided as part of degree courses. These include:

- BII National Licensee's Cert.
- Emergency First Aid Course
- IOSH Managing Safely Cert.
- Security Industry Authority Licence
- Event Safety Passport

Table 6.5 Number of students studying events management at UK Universities

N820	2014/15	2015/16	2016/17	2017/18
First year (all)	2,775	2,550	2,250	2,350
UG UK	5,845	5,305	4,580	4,800
UG rest EU	380	410	565	495
UG non-EU	265	280	300	265
TOTAL UG	6,495	5,995	5,440	5,560
PG UK	200	185	250	210
PG rest EU	100	85	100	80
PG non-EU	340	285	325	240
TOTAL PG	640	560	575	525
TOTAL (UG+PG)	7,135	6,555	6,015	6,085

Source: HESA <https://www.hesa.ac.uk/data-and-analysis/students/table-22> (2019)

Note that totals include non-categorised data. Includes all modes of study and total number of students during that academic year.

For an organisation CPD takes time (often out of the office or event site) and money. The EIB TTF survey identified that the average spend per person, per annum, on an employee's skills development and training is £495 at entry level; £690 at mid-level and £1,004 at senior management level.

One of the benefits of belonging to a trade or professional body is not just the networking and representation, but also the courses and training on offer. The recognition of the value of investment in people and looking at the career pipeline is evidenced by activities, such as the Event Supplier and Services Association's (ESSA) creation of a Future Focus Board (<https://www.essa.uk.com/about-essa/future-focus-board>). There have also been a number of cross-industry mentoring and coaching initiatives, such as Fast Forward 15 (<http://www.fastforward15.co.uk/>) and Elevate (<http://www.elevateme.co/>). These support the idea that there are benefits for the whole industry and not just for individual organisations in offering a structured mentoring process. It is one way of trying to tackle some of the issues around diversity in the workforce. Fast Forward 15, for example, offers mentors for 15 women working at

all levels within the industry and has had many successes for the mentees and mentors (Dashper, 2017).

Training and development is very much part of the workplace environment and culture. Direct links have been made to the need to care for the people working in events and for their wellbeing as a whole. Wellbeing is an issue for all workplaces and recognised as relevant to events, with a focus on mindfulness and other related activities (Macdonald, 2018). In a 2019 Stress Matters report (<https://www.stressmatters.org.uk/>) on the wellbeing and stress in the events industry, a third of respondents had had no training and half of those that had, wanted more. In 2017, the research identified that those with no training had 33% higher levels of stress than those that had had some or a large amount of training. Similar findings were identified by HBAA with their Mental Health survey (<https://www.hbaa.org.uk/content/hbaa-mental-health-survey-reveals-striking-findings-about-impact-industry-pressures-ahead>) and Eventwell (<https://eventwell.org/>).

6.5 Current and future challenges

6.5.1 Workforce environment

There are a number of factors that will influence current and future employment within the events industry. Most of these are not unique to events nor to the UK. A lot can be learnt from research undertaken in other industries and globally, but a way of interpreting and applying this to events and particular roles is necessary. Further work is required on this but cognisance can be paid to work undertaken and published. Many of the global reports on the future of work understandably focus on technological changes but also business models and the human impact (WEF, 2018; OECD, 2019; Deloitte, 2019; ILO and IOE, 2019; World Bank Group, 2019). There are also those views that build different scenarios. This can be seen as a fearful dystopian future or an ideal utopian one where events can offer gainful employment with high rewards in terms of job satisfaction and remuneration. Pressure for competitiveness, growth and productivity when culturally we may be changing e.g. lifestyle economy (RSA, 2018).

6.5.2 Brexit

There have been a number of related reports about the impact of controls on the movement of employment instigated around Brexit but none undertaken specifically for the event sector because of the lack of robust data. With regard to the impact of the EU Exit Referendum in 2016, the EIB TTF 2018 survey discovered that not a single respondent had reported a positive impact on their workforce. Of those asked of the future impact of leaving the EU over the next 1-5 years, less than 2% believed it would have a positive impact on recruitment, training or retention (EIB TTF, 2019).

The main reasons for a neutral or

negative view of the impact of Brexit were given as:

- The current impact of uncertainty on individuals
- Not being sure how things will develop
- Lack of EU applicants.

The Creative Industries Federation and UK Music have called on government for special attention to be given to artists, who are integral to many events, having the freedom of travel into and around the UK (as well as artists travelling overseas). The export potential could be limited, as well as the content of the events. The Hospitality sector have identified the negative impact on the workforce if controls are imposed by Brexit. These have not necessarily been accepted by the government's Migration Advisory Committee (MAC, 2018; MAC, 2019).

6.5.3 Gig economy

The gig, or on demand, economy has been both lauded and heavily criticised. It is something that the events industry relies on and needs to be wary of. The nature of events as 'pulsating' organisations means that they have to expand immediately around an event and contract outside of the event time. The industry, therefore, relies heavily on freelancers, contractors and volunteers and so may fall into the issues faced by zero-hour contracts. It has, however, also been recognised that the flexibility afforded different types of contracts and freelancing is something that future workforces may request more often (CBI, 2018; Wildgoose, 2019; World Bank Group, 2018).

Findings from event agency Wildgoose's Flexible Working Survey (2019) show that a significant number of UK employees are seeking flexible working to better juggle life both in and out of work, without compromising productivity. The findings indicate that work

satisfaction and retention are improved. There is also a positive impact on mental health, with 39% of employees seeing a marked improvement since starting a more flexible work routine. As events themselves are not routine it is important to provide flexibility for the workforce so that they are then in turn flexible when needed for events.

6.5.4 Diverse workforce

To make the events sector relevant to the UK economy and society, it needs to review how diverse it is. This relates to the demographics and skills of those who work in the industry but, like marketing, the behavioural and psychographic characteristics, understanding and openness is important. Emphasis in the last *Events are Great* report was on the gender imbalance within the industry. This is still an issue, but so also is the lack of the Black, Asian and Minority Ethnic (BAME) and registered disabled workers. There is still a glass ceiling and work conditions do need questioning - some of this is specific to certain demographics. For example, women still dominate the number of employees but not at Board level (BCD M&E, 2017). There are still organisations who recruit women because of their contribution to the aesthetics of an event and do not sanction misbehaviour towards staff (Woollacott, 2019). Women are also under-represented in the content delivered by an event, which is why there are movements to increase the diversity of conference and music festival line-ups (e.g. Open Society Foundation, 2018; Enson, 2019; UK Music Keychange <https://keychange.eu/>).

Dashper (2018, p.147) reports on the positive role that mentoring schemes such as Fast Forward 15 can offer those involved, but identifies that, on their own, they do "little to challenge the broader structures and beliefs that sustain gender inequality in the events industry". They offer support,

confidence and advancement for mentees, and event mentors. However, “until ... structural, cultural, social and economic barriers are dismantled, then it is unlikely that gender discrimination will disappear completely from the events industry.” (Dashper, 2018, p.148) Many of these barriers are generic but, within events, not all roles are family-friendly because of long and inflexible hours and frequent travel (Dashper, 2013).

Emphasis over the past few years has been on the next generation to join the workforce (now Gen Z not millennials) but what this misses is the ageing nature of the workforce. Concern has been made about retention of the event workforce from loss of the younger generation to other industries. Focus should also be at the other end of the age-related pipeline. Whilst ‘young blood’ and new ideas and skills are necessary, so are the wisdom and experience of those who may wish to have another ‘career’ rather than retire. People are also looking to change careers and so ageism should not be practised in any activity, such as internships and volunteering (Stanton, 2016). When company directors and those who have worked for some time in events are looking for a change, a new challenge and need less paid hours, then how can we keep them engaged? Volunteering is often a way of entering the industry and gaining experience. Whilst volunteering may be a way of keeping engaged with the industry, like those at the beginning of their career, those later in life also need to be rewarded for their contribution in a meaningful way. Their needs are different and require further research and understanding. This human capital should not be underestimated nor dismissed as being ‘old’.

6.5.5 Technology and automation

Events have been working to adopt and develop new technologies,

especially in the field of audience engagement. The growth of the trade show ‘Event Tech Live’ demonstrates these advancements. The events industry is quite ebullient in how it can resist the threats of technology because of the ‘live’ nature of experiences. However, it does need to be wary of complacency and continue to develop and enhance the human nature of event experiences with technological benefits. Technology must be used for competitive advantage and not as a novelty or because others are using it.

The impacts of technology on the human resources in the events industry have been less well documented. Technological advancements, especially automation, are the general concern of industry. They can be seen as a threat or an opportunity. Research undertaken by a number of bodies emphasises the complex nature that developments could have on the workforce. What they do highlight is that the workforce will be going through a period of change, especially in terms of necessary skills and business models which will impact on the work environment. A recent World Economic Forum (2019) global report on the future of the workforce and global competitiveness identified sector-specific impacts of technological changes. Both the Aviation, Travel and Tourism and the Consumer industries are seen as people-based and the changes will be about augmenting skills rather than replacement. Automation will permit time to focus on more human skills and offer increased efficiency for the industry.

6.6 Conclusion

6.6.1 Summary

Progress has been made in the development of the people part of the events industry. Much of the development has been the growing recognition that people are valuable and that we need to better understand the complex nature of recruitment, development and enhancement of human resources. There are a number of opportunities available to the events industry through alignment with the Creative Industries and Tourism Sector Deals and the implementation of the International Business Events Action Plan and the creation of the Hospitality and Tourism Sector Skills Council.

There is still a natural silo effect where organisations and companies focus on their own professional development but there are larger benefits if cross-industry work is undertaken to better understand their contribution to the pool of talent and the pipeline(s) that are available through and across the different sub-sectors. Fragmentation does not give the sector the synergy and strength that it needs. There may be different named roles and language used in particular sub-sectors, but the main requirements of our human capital mean that we should be supporting, growing and retaining these people in our sector. It should be recognised that, with the changing work environment, this will still be fluid and incomers should be welcomed and sought for their new ideas and to be game-changers in these competitive times.

There are many cross-over and generic skills but also those that are specific to particular roles, e.g. in events. These are evident, particularly in the technical and safety areas e.g. BECTU, SIA. The more generic event manager roles have been less well identified and articulated. The QAA SBS (2016), the level 3 National Occupation Standard and Apprenticeship descriptors for event

assistants also offer some detail here. Progression toward a co-ordinated approach is slow and at times arduous, with competing agendas and conflicting priorities, but the direction of travel is a positive one. Harnessing the opportunities afforded by the Sector Deals, with the proposed Skills Council, a renewed BVEP governance, the EIB agenda, EMAP progression, AEME recognition and a reinvigorated IEM, the future looks more positive for the recognition of the GREAT event talent in the UK.

The need to invest in education, training and reskilling programmes is a global one, across all industries and not just an issue for the events industry. The Hays Global Skills Index 2019/20 also identifies that companies should enable flexible working which would increase the pool of talented individuals to grow and resolve the issues surrounding embracing diversity in the workforce (Hays, 2019). By working together to address some of these larger issues, the events industry should become more resilient and stronger. Always agile and competitive, the events industry should see opportunities within the challenges that it faces. It needs to find a way of celebrating and rewarding talent beyond the annual award shows. The following recommendations are offered by the author of this chapter based upon the evidence within it (and not that of any particular organisation).

6.6.2 Recommendations

- Fight for and use SIC and SOC codes which cover the events industry as a whole
- Communicate across a more standardised and recognised terminology
- Get away from the education OR experience distinction – both are vital but with the development of Apprenticeships there needs to be a clearer distinction

between the two. Celebrate both for their inherent strengths. Training is for doing; Education is for thinking and creating new knowledge

- Organisations should further develop and support education and training opportunities outside of their own business. Most event businesses are SMEs, or even small traders, and so resource barriers to CPD are high
- Actively support higher education providers in education and research to future-proof the sector. Higher education will support the strengthening of the whole sector with graduates with intellectual cognitive skills and knowledge, which are forward looking. This is only possible for the larger organisations in events who have the capabilities and resources to invest in R&D. SMEs do not always have this opportunity
- Higher education providers, through AEME, to offer information on how industry can get further engaged with them. To promote examples so that those in industry understand the role of higher education and the contribution that graduates, academics and research can make to the sector as a whole
- Employers – to be more explicit about what they need from recruitment, education, training and development and voice these to BVEP Partners and other relevant Professional, Statutory and Regulatory Bodies
- Industry – to pump prime and promote opportunities and what they do e.g. DRP open doors; UFI talent grant
- Employees – to take responsibility for their own development in these changing times and to call for more support. As career paths

become increasingly disrupted, personal portfolio careers will shape future progression. Industry employers need to be aware of this and recognise that employing people from other sectors can bring benefits to their organisation

- EIB and BVEP continue to facilitate employer and employee activities at a sector/national level
- EIB and BVEP to work more explicitly with international bodies e.g. EIC, JMIC, IFEA, PCMA, MPI, ILEA.

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CHAPTER 7 INFRASTRUCTURE, ACCESSIBILITY, SUSTAINABILITY

7.1 Introduction

This chapter looks at the third foundation of the government's industrial strategy, Infrastructure, together with two interconnected priority issues for the events industry, for the country and for our world - Accessibility and Sustainability. The chapter:

- describes some of the major investments in events infrastructure (buildings, transport and connectivity) currently under construction or at advanced planning stages, and identifies some current gaps and weaknesses in overall infrastructure provision
- highlights the importance of making events fully accessible, both in terms of facility design and equipment but also in respect of event planning and servicing

- explores the issues, challenges and benefits of adopting a sustainable approach to events for destinations, venues and event organisers.

7.2 Infrastructure

While the UK undoubtedly has a good record for investing in the physical infrastructure required for a 21st century events industry, there will continue to be a need for ongoing investment, whether this is to increase capacity through new or refurbished venues, to adjust existing facilities to meet the changing demands of today's and tomorrow's events, or to improve the transport links into the UK from overseas, within the UK between destinations, or, at a local level, for transportation of event delegates and attendees within and across individual cities.

It is encouraging to report that major infrastructure investments

are underway around the UK, or have reached an advanced planning stage, and some of the major ones are described briefly below.

7.2.1 Venue Investments

Aberdeen

P&J Live opened its doors in the summer of 2019, providing a new facility beside Aberdeen International Airport. The 15,000 capacity main arena will host conferences, exhibitions and music concerts. The plans for the £333 million complex also include a 6,000m² multi-purpose, sub-divisible exhibition hall, seven conference suites, and nine meeting rooms. Complementing the facilities will be two on-site hotels: a 200-room Hilton, and a 150-room Aloft. A 33,000m² semi-subterranean area below the main central square will provide additional exhibition space. More information: www.pandjlive.com



Figure 7.1 P&J Live, Aberdeen

Blackpool

Blackpool is currently undergoing a £500 million transformation, which includes a new £28 million conference and exhibition centre which sits adjacent to the existing Winter Gardens complex. The new centre, due to open in May 2020, will offer almost 3,000m² of space over two floors, and accommodate up to 2,000 delegates across the multi-functional space. Once completed, the complex will provide 4.9 acres of connected event space and the capacity to accommodate up to 7,000 delegates. More information: www.visitblackpool.com/business

Bradford

The former Bradford Odeon cinema is being converted by the NEC Group into a 750 capacity venue for conference and banqueting, whilst the main auditorium will be reinstated as a 4000 capacity live events venue. It is anticipated that the renovated and restored building will reopen in 2020/2021.

Bristol

There are two planned events venue developments in Bristol: YTL Arena

Bristol and Ashton Gate Sports & Convention Centre.

- a. YTL Arena Bristol. The proposal is to create the UK's third largest arena with a capacity of 17,000 in a redevelopment of the former aircraft hangars at Bristol's Filton Airfield, the home of Concorde. The arena will be used for sporting events, family entertainment, music events et al. The anticipated completion is 2022. More information: <https://www.ytldevelopments.co.uk/developments/ytl-arena-bristol>
- b. Ashton Gate Sports & Convention Centre. Ashton Gate Stadium, home of Bristol City FC, has revealed plans for a new Phase 2 £100 million development, following its successful Phase 1 £45 million transformation, to create Ashton Gate Sports & Convention Centre. A 4000-capacity home for Bristol Flyers Basketball will be the centrepiece of the new development, which will also

include additional housing, a multi-storey car park, and two hotels. The Centre will also provide space for the growth of a broad range of community-based sports, run by the group of charities based at Ashton Gate. More information: <https://www.ashtongatestadium.co.uk/development/>

Cardiff

Cardiff City Council has revealed plans for a mixed-use £500 million development which includes a 15,000 capacity arena, with the Red Dragon Centre in the Bay as its preferred location for the indoor arena. The 30-acre development would also include retail space, restaurants, leisure space and office space, as well as a cinema complex, 350+ hotel bedrooms, a 1500+ space multi-storey car park and waterfront apartments (Stand Out, 2019).

Farnborough

The Farnborough International Exhibition & Conference Centre opened in March 2018, alongside Farnborough Airfield, home to the



Figure 7.2 Bonus Arena, Hull



Figure 7.3 Artist's Impression of Olympia London

world-famous 5-day Farnborough International Airshow, which welcomes over 100,000 people through its gates every two years. The new Centre offers 20,000m² of flexible event space, including a 12,500m² exhibition hall, plenary space for 5,000 delegates, nine multi-purpose meeting rooms able to accommodate up to 1,000 delegates theatre-style, on-site parking for 3,500 cars and direct access to the M3 and M25 motorways. More information: www.farnborough.com

Glasgow

Glasgow's major events venue, the Scottish Event Campus (SEC), has applied for planning permission in principle for a major expansion of its facilities, with a vision to create a unique global event campus. The £150-£200 million project focuses on developing the west end of the campus and includes a dedicated entrance, additional highly flexible meeting, exhibition and networking spaces, with panoramic views of the city and River Clyde. It is estimated that, in a mature year, the new facilities would generate £123 million of economic benefit to the Glasgow area, £106 million to Scotland and £71 million to the UK. This would be in addition to the £400 million of impact to Glasgow, £227 million for Scotland and £136 million for the UK generated annually from the

existing facilities. More information: <https://www.sec.co.uk/>

Hull

Since 2016 Hull & East Yorkshire has seen over £110 million invested in its venues. The largest project has been the opening in August 2018 of Bonus Arena, Hull's new £36 million music, arts and conference complex. The arena can cater for up to 600 dinner guests, offers a 3,500 capacity concert auditorium with the flexibility to reduce to a 2,900 all-seated event or a 1,200m² exhibition space with 800-seat conference auditorium. More information: <https://www.bonusarenahull.com>

London

Two of the major venue investment projects being planned in London include Olympia London and the MSG Sphere.

- a. Olympia London. Planning approval has been obtained for a £1 billion upgrade to Olympia London. The plans will turn the 14-acre site into a destination with hotels, restaurants, performance venues and office space, and will also include 2.5 acres of new public space. The transformation is set to begin in 2020 with the first tenants expected to move in by 2023.

Other key features of the project include a 1,500-seat theatre; a 1000-seat performing arts venue; a four-screen cinema; 63,000m² of creative office space; upgrades to existing spaces, including an upgrade to the exhibition space to improve circulation and to add a new conference facility accessible from all of the halls (the overall exhibition space available will remain the same); and an 18,500m² logistics centre. Further information: <https://olympia.london/>

- b. MSG Sphere. New plans for what is claimed to be the UK's largest live music arena have been revealed by The Madison Square Garden Company (MSG). The MSG Sphere will be able to seat 17,566 people or hold 21,500 standing. The new venue will be 120 metres wide and 90 metres high, and will be covered in LED panels. It will be constructed in the Stratford area of east London. It is projected that MSG Sphere will support up to 4,300 jobs each year during the venue's three-year build, as well as supporting up to 3,200 jobs once the venue opens, generating a reported £2.7 billion for the UK economy. More information: www.msg.com/london



Figure 7.4 ICC Wales

Manchester

In June 2019 plans were unveiled for a new venue in Mayfield, Manchester, capable of holding up to 10,000 people (Macdonald, N., 2019). The venue, called Depot, is due to launch in August 2019 with Manchester Pride Live. Subject to planning consent, the space will become a multi-use cultural venue for the city and is expected to be in use for five years while the £1 billion-plus regeneration of the Mayfield site, near Manchester Piccadilly Station, is progressed. Alongside the proposed main performance space at Depot, there will be two smaller areas. One of these, called Concourse, will be providing a range of free-to-attend community events, seasonal activities and food experiences. The second space, called Archive, will offer a more intimate performance area as well as low-cost rehearsal and studio space for local artists.

NewcastleGateshead

Gateshead Quays has been named as one of seven schemes officially backed by the Department for International Trade as part of £2 billion of new investment opportunities launched across the UK. The 3.84 hectare site will be transformed by the £250 million development which will incorporate a significant flat floor convention and exhibition centre with 10,300m² of conference and exhibition facilities.

There will also be a state-of-the-art, 12,500 seat entertainment arena, bars, restaurants and extensive public realm. The development on the Gateshead waterfront will sit between the iconic buildings of Sage Gateshead and BALTIC Centre for Contemporary Art. It is anticipated that the development will boost the regional economy by over £29.5 million annually and attract over 290,000 visitors a year. More information: www.newcastlegateshead.com/conferences

Also in NewcastleGateshead is The Helix, a £350 million flagship development which combines state-of-the-art building hardware with the 'knowledge economy' software of world-leading experts and research. The Helix is a partnership between Newcastle City Council, Newcastle University and Legal & General. It brings together industry leaders, businesses and top researchers in a new innovation community over a 24-acre sustainable urban development. More information: <https://newcastlehelix.com/>

Newport

The ICC Wales is a joint venture between the Welsh Government and the Celtic Manor Resort. The £84 million development, opened in September 2019, provides 26,000m² of total floorspace for meetings, conferences and exhibitions and will be able to accommodate up to 5,000 conference delegates at

any one time. It incorporates a 1500-seat auditorium, 12 flexible meeting rooms, a 4,000 square metre pillar-free main hall, double-height glass atrium, a 2,500 square metre outdoor plaza for outside events and teambuilding, and offers 2,000 car park spaces. It also has bridges taking delegates straight into fresh air and woodland.

Swansea

It was announced in December 2019 that construction has started on Swansea Arena, part of the first phase of the £1 billion regeneration and transformation of Swansea city centre (Swansea, 2019). The arena marks the start of the council's £135 million 'Swansea Central' phase one project which comprises the new waterside 3,500 capacity indoor arena as well as new restaurants, shops, a 1.1 acre coastal urban park, city centre apartments, two multi-storey car parks providing 960 spaces, a digital plaza and a 'gateway' pedestrian bridge over Oystermouth Road. With state-of-the-art facilities for conferences and meeting rooms, Swansea Arena is due to bring conferences and events into South West Wales, in addition to its role as a music and entertainment venue.

7.2.2 Conference Centre Broadband Connectivity Fund

In conjunction with the Tourism Sector Deal announced in June 2019 (DCMS, 2019a), the government published an International

Business Events Action Plan (see Chapter 4 of this report)(DCMS, 2019b). As part of this plan the government confirmed that it will run a new £250,000 scheme to improve broadband connectivity in conference centres, enabling them to receive full fibre access.

7.2.3 Rail Infrastructure Projects

There are two major rail infrastructure projects in Britain: the Elizabeth Line (formerly known as Crossrail) and High Speed 2 (HS2).

- a. Elizabeth Line. The Elizabeth Line is the new £15 billion 73-mile railway line that crosses London from east to west. It connects Reading and Heathrow Airport to Shenfield and Abbey Wood via central London. It was due to open in December 2018 but is now scheduled to open between October 2020 and March 2021. Several high profile events venues are expected to benefit from the new route, most notably the Barbican Centre and ExCel London. Each Elizabeth Line station will have over 50 kilometres of communications cabling, 200 CCTV cameras, 66 information displays, 200 radio antennas, 750 loudspeakers and 50 help points. More information: <https://tfl.gov.uk/travel-information/improvements-and-projects/elizabeth-line>
- b. High Speed 2 (HS2). High Speed 2 is a planned high-speed railway. Sections were approved in 2017 and await construction, while other sections await approval. When completed, the £80+ billion HS2 will directly connect London, Birmingham, the East Midlands, Leeds and Manchester. Phase 1 (London-Birmingham) is scheduled for completion by 2026 and Phase 2 by 2032-2033. More information: <https://www.hs2.org.uk>

- c. The Tourism Sector Deal also describes an investment of £300 million by the Department for Transport for improvements to the Brighton Main Line, a key route to Gatwick Airport. The improvements will reduce delay hotspots and boost the reliability of rail travel in S.E.England.

7.2.4 UK Airport Investments and Developments

The Department for Transport is developing an Aviation Strategy – Aviation 2050 – setting out the government’s long-term vision for aviation to 2050 and beyond, and this will be of particular importance to events and to tourism (Department for Transport, 2018).

In the government’s ‘Tourism Sector Deal’, reference is made to a new Passenger Charter:

‘As an important part of the Government’s long-term Aviation Strategy, we are proposing a new industry-wide Passenger Charter that will seek to increase awareness of consumer rights standards across aviation, improve passenger services and promote best practice in the aviation sector.’

The Tourism Sector Deal also describes the opportunity for airports to be transport and ticketing information hubs:

‘The Government recognises that airports are in a unique position to be transport and ticketing hubs. Indeed, many airports are already developing digital and face-to-face facilities that will make onward journeys more straightforward for passengers. Integrated ticketing can refer to a ticket for the whole journey or encompass multiple tickets, and the Government encourages airports to lead in the development of integrating service offerings with surface transport providers.’

Airports across the UK are planning,

and investing in, expansions and developments to keep up with the growing passenger numbers. Here are some examples:

- a. Heathrow Airport. The proposed new third runway for Heathrow Airport will be the first new full-length runway to be built in south east England since World War II
- b. Gatwick Airport. In 2018 Gatwick announced a £1 billion expansion plan to accommodate the predicted growth in passengers of 8 million, reaching 53 million by 2023. The development includes extending the North Terminal, delivering 6 new departure gates, a new domestic arrivals facility, new baggage reclaimers in the South Terminal, adding 1,200 new car parking spaces and upgrading Gatwick’s train station
- c. London City Airport. The airport is undergoing a £480 million investment programme including 8 new aircraft stands, a digital air traffic control tower, a full-length parallel taxiway and an extension to the terminal building
- d. London Luton. London Luton is investing £110 million to transform the airport. The developments include the provision of more shops, bars and restaurants, a multi-storey car park closer to the terminal, a wider range of flight destinations, better transport links to central London and bigger and better layouts to speed up security. Additionally, the airport has plans to expand and increase its capacity, to include a new terminal and other landside and airside infrastructure
- e. Birmingham Airport. In 2018 Birmingham Airport published its ‘Master Plan’ setting out what it plans to deliver in the

period up to 2033. As part of the plan, Birmingham Airport is building a terminal extension to provide a larger departure lounge and glazed mezzanine, and to improve baggage sorting facilities.

- f. Manchester Airport. Manchester Airport is undergoing a £1 billion transformation to include the construction of a new 'super terminal'. The new departure terminal is set to more than double in size.

7.3 Potential Infrastructure Weaknesses

While there is no comprehensive database to provide information on venue occupancy levels in the UK, the level of investment summarised above indicates a thriving sector. However, there is a feeling across the events industry that, compared with the levels of investment internationally, other countries are aggressively increasing their venue stock, whereas the UK stock has diminished in real terms. Simple supply and demand would indicate that, if there is more venue stock, this would stimulate more events. If more venue stock is created in the right location to suit business sectors, events would fill them. However, there is also a feeling among some events industry leading figures that certain key international events are becoming wall-bound within existing venues and there is a risk that they will outgrow these and seek larger space outside the UK.

It is believed that organisers of trade and consumer shows would welcome a purpose-built venue (likely to be 60,000m² of divisible space, supported by conference facilities) in the west of London, near to Heathrow Airport and the international transport links this brings plus access to existing hotel stock.

In terms of transport and rail infrastructure, all significant projects



as well as new government strategy documents should take into account event venues in their feasibility studies/workflows.

7.4 Event Accessibility and Inclusivity

One of the important developments in society over the past few decades has been a change in the way that people with disabilities are viewed and treated. The focus has moved away from emphasizing disability (and hence people's limitations) to the positive promotion of accessibility. It means promoting inclusion and not exclusion, and working to overcome the principal barriers faced by disabled people: inaccessible environments, lack of appropriate information, and lack of awareness or negative attitudes.

The Equality Act 2010 legally protects people from discrimination in the workplace and in wider society (The National Archives, 2010). It replaced previous anti-discrimination laws with a single Act, making the law easier to understand and strengthening protection in some areas. The Act protects people from discrimination because of their:

- age
- gender
- sexual orientation

- having undergone, undergoing, or proposing to undergo gender reassignment
- disability
- being pregnant, or having a child
- race (including colour, ethnic or national origin, and nationality)
- religion or belief, or lack thereof
- marital / civil partnership status.

These are defined by the Act as 'protected characteristics'. Under the Act, it is illegal to treat someone with a protected characteristic, for example a disability, less favourably than you would treat others. It is also against the law to have arrangements in place that put people with a protected characteristic at an unfair disadvantage, unless these arrangements can be fully justified.

Importantly, the Equality Act also states that service providers must make reasonable adjustments to ensure that disabled people are not discriminated against. These adjustments relate to the way in which services are delivered, physical features of venues, and the provision of additional equipment for a disabled person. For example, if a

feature of a venue or an event puts a disabled person at a substantial disadvantage in comparison to someone who is not disabled, the Act requires that reasonable steps are taken to remove the feature, change it, or provide a reasonable means of avoiding it. In summary, service providers and event organisers are required to think in advance about what changes might be necessary to ensure that disabled people can use their service or attend their event, and plan ahead for these changes.

7.4.1 The Value and Importance of the Accessible Market

There is a compelling case for making events, tourism venues and experiences inclusive. People with health conditions and impairments and their travelling companions spend around £12 billion on trips in England each year (£12.4 billion for Britain as a whole). However, VisitEngland research shows that an extra £117 million could be generated from additional trips if accessibility was improved (VisitEngland, 2018).

A publication by VisitScotland and Event Scotland (VisitScotland & Event Scotland, 2016) entitled 'Inclusive and Accessible Events – a guide for event organisers' states that:

'Accessibility is often regarded as being mainly associated with disability. It's true to say that making your event accessible for disabled people would likely be beneficial alone, as:

- There are 13.3 million disabled people in the UK, approximately 21% (i.e. one in five) of the total population
- The combined markets hold an estimated annual disposable income of over £200 billion
- The market represents a loyal customer base

However, the accessible market is much wider than this, and includes, for example:

- families with young children
- older people
- people with temporary physical impairments (for example, those on crutches)
- people with specific dietary requirements; and many others.

In fact, all of us are likely, at some point in our lives, to benefit from certain adjustments that can be made to make it easier and more enjoyable to attend events. Improving access won't just be helpful for those in the accessible market – it's also likely to generally enhance the experience of your event for everyone attending.'

The VisitScotland/EventScotland guide also makes the important point that accessibility is not only about physical access. It says:

'There's a common misconception that making events accessible is all about expensive modifications to venues and equipment to improve physical access, primarily for wheelchair users. While physical access obviously plays a very important role in making events accessible, there is more to hosting an accessible event.

The definition of disability also covers, for example, visual impairments, hearing impairments, and learning disabilities, as well as any other conditions that have a substantial and long-term effect on a person's ability to carry out their normal day-to-day activities. In fact, it is estimated that 70% of disabled people have a hidden disability i.e. one that is not apparent from looking at the person.

There are many ways in which you can make your event more accessible in addition to improving

physical access, including changes to communication style, attitude, and simply making people feel welcome. The level of customer service is often a greater concern than physical access for those in the accessible market.'

VisitEngland takes a leading role in the field of accessible tourism and events, providing direction and support to businesses and destinations. It offers a range of guidance, tools and resources assisting businesses to maximise engagement with this valuable market: www.visitengland.org/access

7.4.2 Tourism Sector Deal

The Government announced in November 2018 that it would be entering into an official negotiation with the UK's tourism (and events) industry for a Tourism Sector Deal, with ambitions to make the UK the most accessible tourism destination in the world. These negotiations were concluded during the first half of 2019 and the Tourism Sector Deal was published in June 2019 (DCMS, 2019a).

In respect of accessibility, the Tourism Sector Deal states:

'In 2016, Britain scored just 25% on its accessibility credentials in the Nation Brands Index and 0.6 million inbound visitors in 2018 had a disability. The Nation Brands Index suggests that Britain, like its competitors, is not widely recognised for its accessibility (France scores 22% and Germany 27%). The sector will strive to see this figure rise over the next 5 years. The government and industry will work together to make the UK the most accessible destination in Europe by 2025, with a target of increasing the number of inbound visitors with a disability by 33% by 2025. Promoting destinations as welcoming and accessible will be a key part of Britain's brand proposition.'

'The British Tourist Authority (VisitBritain) will increase their publicity about accessible travel and provide inbound visitors with increased information about the accessibility offer in the UK through a brand new website.'

7.4.3 Other Perspectives and Initiatives on Accessibility

Lizzy Eaton, in an article entitled 'Stop ticking boxes on disabled access' for 'Conference News' magazine (Eaton, E., 2019), writes that 'adopting inclusivity doesn't have to be costly or excessively challenging if it's considered in the early stages of developing the event concept and design. It could be as straightforward as adding a designated steward to the staffing rota to assist visually impaired or hard-of-hearing attendees, removing physical barriers like registration desks, changing the height of signage or making the step-free route the main route for all users.'

She concludes her article: 'Allowing those with disabilities the opportunity to learn, network and experience products and services in the same way as their able-bodied colleagues means everyone feels that they are a relevant and valued attendee, customer or business representative, which can drive advocacy for your brand.'

Lyndsey McLean of Edinburgh Festival Fringe, in an article entitled 'Making changes' (McLean, L., 2019), describes a number of new measures that the Edinburgh Festival Fringe Society has put in place to ensure that the three-week-long Fringe offers a great event experience for deaf, disabled and autistic customers. In 2018 the Fringe Society 'developed a number of existing projects, and created new ones, to improve the experience of everyone who attended the annual event'. This included an investment in technology 'to enable customers who don't have the option of verbal communication

to complete their own bookings (including payment) via text and email'. It has expanded information in the Fringe programme and on www.edfringe.com to include access information about all spaces within venues, and also published booking information in British Sign Language (BSL) for the first time, in the form of a short video. Sensory backpacks were introduced at the 2018 event, designed to make the Fringe as enjoyable and stress-free as possible. 'Each backpack contained items to help the user relax and overcome overwhelming situations, including a fidget toy, earplugs, water bottle, stress reliever, ear defenders, a social story outlining what visitors should expect to experience and a list of relaxed performances at the Fringe.' A range of other new accessible measures is outlined in the article.

7.5 Sustainability in Events

Approaches to sustainability in the meetings and event industry have evolved over the last two decades, from a desire to create a key differentiator to a need to monitor and report on progress. The recent adoption of event sustainability standards suggests the practice has moved from a niche activity to a mainstream planning strategy.

7.5.1 United Nations Sustainable Development Goals

The recognised framework against which sustainable policies and practices in the events industry are being created is the United Nations Sustainable Development Goals (UN SDGs) (United Nations, 2015). The Sustainable Development Goals are the blueprint to achieve a better and more sustainable future for all. They address the global challenges we face, including those related to poverty, inequality, climate, environmental degradation, prosperity, and peace and justice. The Goals are interconnected and, in order to leave no-one behind, it is important that

we achieve each Goal and target by 2030. The 17 Goals are:

1. No poverty – donate what you don't use
2. Zero hunger – avoid throwing away food
3. Good health and wellbeing – vaccinate your family to protect them and improve public health
4. Quality education – help children in your community to read
5. Gender equality – call out sexist behaviour and language
6. Clean water and sanitation – avoid wasting water
7. Affordable and clean energy – use only energy efficient appliances and light bulbs
8. Decent work and economic growth – buy from green companies that are equal opportunity employers
9. Industry, innovation and infrastructure – think of innovative new ways to re-purpose old material
10. Reduced inequalities – raise your voice against discrimination
11. Sustainable cities and communities – bike, walk or use public transportation to keep our cities' air clean
12. Responsible production and consumption – recycle paper, plastic, glass and aluminium
13. Climate action – educate young people on climate change to put them on a sustainable path early on
14. Life below water – avoid plastic bags to keep the oceans safe and clean
15. Life on land – plant a tree and help protect the environment
16. Peace, justice and strong institutions – use your right to elect the leaders in your country and local community
17. Partnerships for the Goals – get

the SDGs in action app to learn about the Goals and ways to help achieve them!

The UK's Positive Impact Events (www.positiveimpacetevents.com) has established a number of partnerships with United Nations bodies in order to facilitate collaborations between the United Nations and the event sector in areas such as human rights, carbon measurement, food waste and plastic.

7.5.2 Events Industry Response to UN SDGs

It is apparent from the recent strikes, protests and campaigns by school-age children around the world that sustainability, climate change, plastics pollution, and the many other issues addressed by the UN's Sustainable Development Goals will become ever more mainstream in our societies and communities. It is vital that the events industry speaks the language of the SDGs and seizes the opportunity to become a key strategic tool in achieving solutions to the world's challenges.

To meet the UN SDGs people will need to come together to create, collaborate and innovate. That is the service which the event industry provides. The shift in global business culture towards sustainability is an opportunity for the event sector because events can be used to demonstrate positive societal impact. Being sustainable offers a shift from the events industry being perceived as one which is providing a service in terms of a room, chairs and AV to the events industry being perceived as a strategic component to achieving solutions to the world's challenges.

The events industry has a responsibility to help to meet the UN's SDGs. It can do so by using events to explain and promote policies and best practice. However, the industry often struggles to know where to start in the

development of such policies. It was, therefore, encouraging to see, in May 2018, the Events Industry Council hosting the first Global Sustainable Event Standards Forum at IMEX Frankfurt, bringing together leaders in the sustainability community to discuss event standards and criteria and how to encourage adoption of these practices globally (Events Industry Council, 2018). Extensive discussion and debate resulted in the drafting of a definition for event sustainability and of four guiding principles that the Forum participants believe should underpin any sustainable event standards. The definition and guiding principles are:

Definition

Sustainability for events means taking action towards preserving our natural environment; promoting a healthy, inclusive society; and supporting a thriving economy.

Four Principles of Event Sustainability

1. Event organisers and suppliers share responsibility for implementing and communicating sustainable practices to their stakeholders
2. Basic environmental practices include:
 - a. Conservation of resources, including water, energy and natural resources
 - b. Waste management
 - c. Carbon emissions reduction and management
 - d. Supply chain management and responsible purchasing
 - e. Biodiversity preservation
3. Basic social considerations include:
 - a. Universal human rights
 - b. Community impacts
 - c. Labour practices
 - d. Respect for culture
 - e. Safety and security

- f. Health and well-being
4. Sustainable events support thriving economic practices through:
 - a. Collaboration and partnerships
 - b. Local support, including small and medium enterprises (SMEs)
 - c. Stakeholder participation
 - d. Equitable economic impact
 - e. Transparency
 - f. Responsible governance

These Principles for Sustainable Events address all 17 of the United Nations Sustainable Development Goals.

7.5.3 'The Future of Sustainable Events'

CWT Meetings & Events, the global meetings and events division of CWT, published a supplement (or 'bonus feature') to its 'M&E 2020 Future Trends Report' entitled 'The Future of Sustainable Events' in which it states that sustainability will be more important to events than ever in 2020 (CWT Meetings & Events, 2019). It says that, as activists protest in some of the world's best-known destinations – including London, Sydney, Amsterdam, Madrid, New York and Washington DC – demanding action on climate change, companies are increasingly taking notice.

Derek Sharp, senior vice-president and managing director, CWT Meetings & Events, commented:

“The sustainability of the meetings and events industry, in fact of the entire travel industry, is at the forefront of companies' and planners' minds in 2020. It's driven by news coverage of climate change but, more importantly, it's supported by the next generation of travellers – the Millennials who are poised to become the biggest group of business travellers globally from 2024 onwards, and the Centennials who

are right behind them. These are people for whom travel has become commonplace and accessible in a way that it wasn't for older generations. They want to continue meeting in popular destinations, but they are also hyper aware of the need to adopt sustainable practices that respect the environment and local communities wherever they go."

CWT Meetings & Events says that, in response, companies and meeting planners are adopting various initiatives, including off-setting air miles with carbon, eliminating plastic waste, opting for locally sourced and locally produced food and drinks, or choosing ethical suppliers.

7.5.4 ABPCO Response

In a report entitled 'Transforming Tourism Value Chains for Sustainable Development: What The Event Industry Can Learn' and published jointly with Positive Impact Events, the Association of British Professional Conference Organisers (ABPCO) recommends a number of actions which the event industry can take to improve the sustainability of events and minimise any negative impacts on the environment (ABPCO & Positive Impact Events, 2018). The recommendations focus on the areas of phasing out single-use plastics, sustainable food procurement, and circularity in the supply chain. They include:

- Ensure that all event tenders (RFPs) ask what the supplier does to eliminate single-use plastic, what alternatives they are offering, and how they can help the event organiser to communicate this to their delegates
- Measuring and understanding disposal options is key. The event industry should be ready for global campaigns to address the challenge of plastic in collaboration with the United Nations Environment

Programme (UNEP)

- Ensure that all event tenders ask what the supplier does to procure food responsibly, whether this is by procuring local, certified or fair trade, seasonal, organic, decreasing carbon footprint or more plant-based
- Ensure that all event tenders ask what the supplier does to minimise food waste through: production, plate sizes, spoilage and food disposal
- Following the lead of the hospitality sector, the event industry could educate event organisers to understand the impacts on the environment of cooling and refrigeration and the positive impacts of renewable. This could be linked to the transportation of food-stuffs and the positive impact of buying more locally and decreasing the (refrigerated) transport costs
- Sustainable procurement can accelerate the transition to a circular economy. Circular products, materials and services would provide the industry with consumer information tools, life cycle costs and opportunities for co-operation between suppliers and the event industry. The event industry could:
 - specify resource efficiency levels
 - measure recycled content
 - communicate reparability – this could facilitate identifying how to extend a product's lifetime through a process of:
 - reuse
 - repair
 - remanufacture
 - recycle

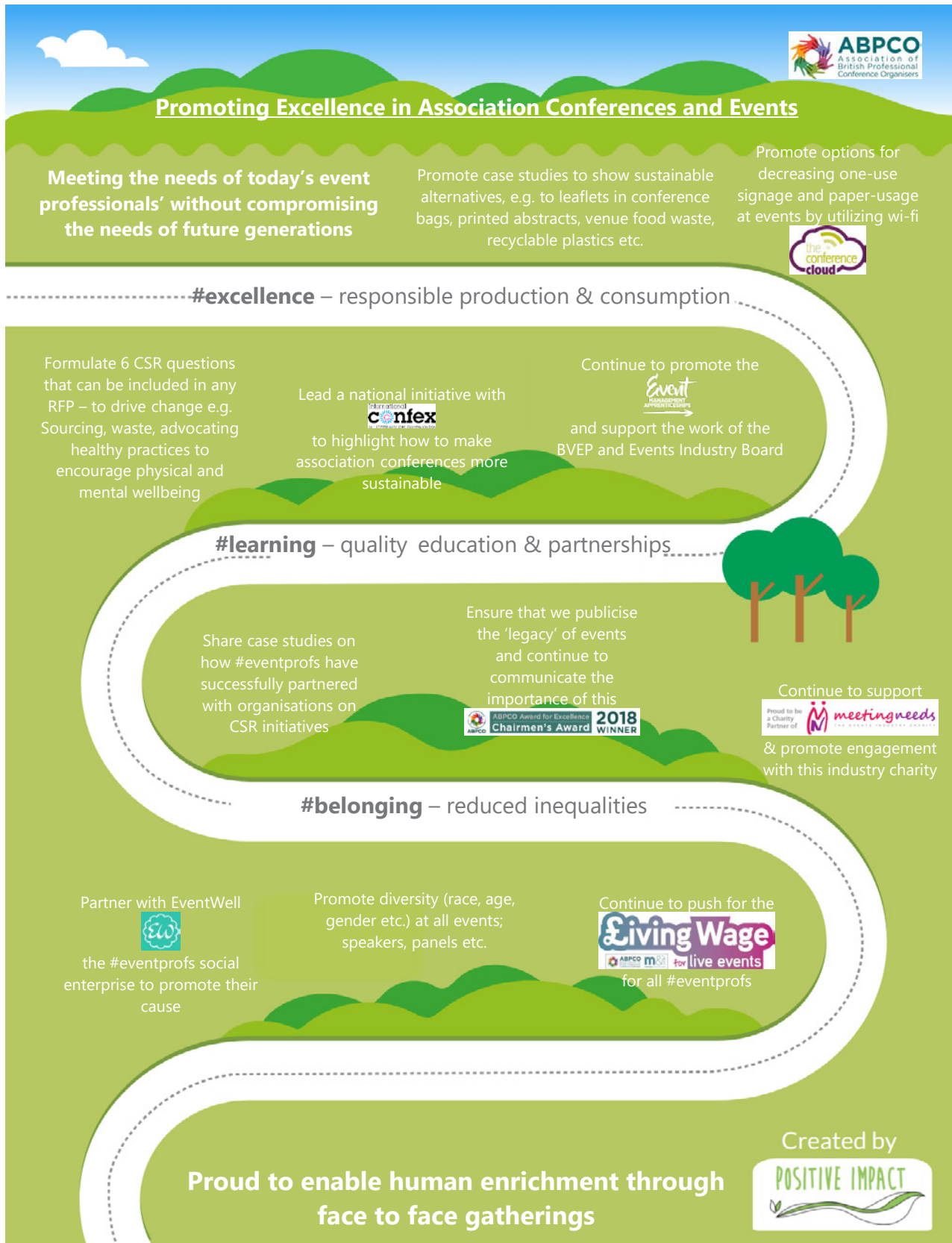
ABPCO views the procurement process as fundamental in gathering momentum to move towards a

sustainable supply chain within hospitality. The events industry should harness this and ensure that all those with responsibility for procurement stress the importance of this within their tenders and specifications. If venue and accommodation providers have to prove the responsible measures and associated actions they are taking, then businesses will prioritise relevant outcomes to ensure that they remain competitive within the industry. This will accelerate the changes required and drive tangible impact.

The report also includes a roadmap compiled by ABPCO members to highlight economic and social impacts and what can be done to enhance event sustainability. The roadmap's recommendations include actions such as the following:

- Promote options for decreasing one-use signage and paper usage at events by utilising Wi-Fi
- Formulate six corporate social responsibility (CSR) questions that can be included in any RFP to drive change e.g. sourcing, waste, advocating healthy practices to encourage physical and mental wellbeing
- Share case studies on how #eventprofs have successfully partnered with organisations on CSR initiatives
- Continue to support and promote engagement with the 'Meeting Needs' charity
- Continue to push for the living wage for all #eventprofs
- Ensure that the legacy of events is fully publicised.
- The full ABPCO/Positive Impact report can be downloaded at: <https://www.abpc.org/sustainability>

Figure 7.5 ABPCO Sustainability Roadmap



7.5.5 Site's Sustainability Charter

Also in 2018 Site (the Society for Incentive Travel Excellence), assisted by the UK's Positive Impact Events, created a sustainability charter to further its sustainability strategies – a written commitment to ensuring a sustainable future (Site & Positive Impact Events, 2018). The work done by Site aligns with ISO 20121, the international standard for implementing an approach to sustainability. Site's charter includes the following objectives based on the key issues it identified:

- Ask the supply chain 'what is the sustainable option?'
- Lead by example and spread the message that incentive travel facilitates the opportunity for people to meet which is how the UN SDGs will be achieved
- Address the impact of waste caused by incentive travel starting with measuring food, material and water waste.

Site will strive to leave a positive legacy by:

- Empowering a sustainability team to review its sustainability objectives annually
- Continuing to engage with its global community to decide on its annual objectives
- Continuing to provide materials to meet its annual objectives and support its community on their sustainability journey.

Individual chapters of Site around the world are being encouraged to create their own roadmap toolkits to plan the practical steps and actions that they will be taking on their sustainability journeys.

7.5.6 'The Green White Paper: Sustainability in Meetings and Events'

In its 2018 white paper entitled 'The Green White Paper: Sustainability in Meetings and Events', BCD Meetings & Events recommends seven steps for events businesses to get started on a sustainability programme (BCD, 2018):

1. Get executive buy-in. Ensure company leaders incorporate social responsibility into global business strategy
2. Create a cross-functional sustainability leadership team. To maintain ongoing support, assemble an executive sustainability committee made up of leaders from across the organisation
3. Engage and educate employees. Employee participation in sustainability doesn't happen automatically. Use educational programmes to win support
4. Be global and local. It's essential to have employees in each country committed to the success of the global programme
5. Tap into industry best practices. For companies just getting started begin with the priorities that third-party frameworks, such as ISO 20121, recommend
6. Be realistic. It takes time and effort to implement a global sustainability programme. Plan a phased approach from the start
7. Don't reinvent the wheel. Emulate companies that demonstrate sustainability success. The United Nations Global Sustainability Goals and United Nations Global Compact website offers information on thousands of businesses who are committed to the world's largest sustainability initiative.

The BCD white paper suggests that the meeting and event industry needs help in the following areas to continue to address sustainability issues:

1. Best-in-class sustainability products: while there are sustainable alternatives for many event supplies, continued innovation is needed. The following event-related products are ripe for further research and development to reduce waste: carpet, carpet covering, shrink wrap, banners and adhesive graphics. New and creative products that also support charitable and social causes are of value
2. Low-carbon event destinations and venues: Many progressive cities provide low-carbon, low-waste venues for events. Others lag behind. Convention bureaux (CVBs) have a role to play by urging local governments to join progressive sustainable city networks, such as the Global Destination Sustainability Index, that helps destinations, convention bureaux, event planners and MICE suppliers drive the adoption, promotion and recognition of responsible practices in the business tourism and events industry
3. Clean, efficient energy: Utilities, governments and transportation industries decide what powers the grid and the vehicles events rely on. Governments and utilities can support the event industry's drive for lower carbon meetings by pursuing aggressive renewable energy goals. The transportation industry can also assist by advancing cleaner, efficient fuel standards and accelerating the adoption of electric vehicles
4. Health and safety: Event professionals care about participants, employees

and immediate vendors by providing safe and healthy event environments. But beyond these direct relationships it can be hard to ensure remote suppliers are providing similar conditions for their workers. Substandard labour practices for farm and factory workers globally are of particular concern. Here the event industry relies on labour associations and production and manufacturing industries to ensure codes of conduct that protect workers are developed and followed

5. **Fairness and inclusion:** Many jurisdictions have laws that protect minorities and ensure inclusion of those with unique needs and perspectives. However, some locations lack protections, or worse, have laws that enable discrimination. Event professionals want guests to feel welcome, and can support the work of governments to enable equal inclusion and freedom of expression
6. **Measurement tools:** Proving return on investment in event sustainability is a challenge. There is no common method for how to measure event impacts, and many tools that assist with measurement are proprietary. Event sustainability would advance if industry-endorsed measurement tools that track accepted indicators for sustainability, such as waste, carbon emissions and volunteer hours, were freely available.

7.5.7 Global Destination Sustainability Index

The Global Destination Sustainability Index (GDS-Index) was launched in 2016 and promotes responsible business tourism practice. In 2019 it published a white paper entitled 'Creating better places to live, meet and thrive in'

(GDS-Index, 2019a). The GDS-Index is a destination level programme that measures, benchmarks and improves the sustainability strategy and performance of meetings, events and business tourism destinations. It is a global movement with a mission to engage, inspire and enable destinations to become more sustainable places to visit, meet and thrive in.

The GDS-Index white paper describes destination management and marketing organisations as 'evolving into destination stewards and changemakers. They are progressively taking a bigger role in accelerating their city's sustainable development plan and improving their competitive position in the global market.'

The GDS-Index white paper defines a sustainable destination as:

"Sustainable destinations are places that actively account for the current and future economic, social and environmental impacts of their events and tourism industry, while engaging and listening to the needs of the host communities, the environment, visitors, and the industry.

They have collaboratively developed a long-term and regenerative vision, and take the lead as stewards and catalysts in making a better place to visit, meet, and thrive in."

The GDS-Index research identified four core building blocks to take on this role successfully:

1. **Take The Lead:** Being just a promoter is not an option anymore. DMOs must evolve from a destination marketing organisation to a destination management organisation. As destination stewards, DMOs need to take a leading position in driving sustainability across a destination by facilitating

conversations, shifting culture and nurturing more authentic connections amongst their constituent communities.

2. **Develop A Masterplan:** Destinations need to have a deep understanding of the scale and impact caused by the global megaforges, and develop a long-term sustainability strategy that both aligns with the municipal vision while also leveraging the events and tourism industry to catalyse, accelerate and support positive change.
3. **Integrate Into Core Strategy:** Sustainability can no longer be viewed as a vehicle for promotion. It needs to be integrated as both a core pillar of the DMO's business strategy, and as a fundamental aspect of management across the organisation – from talent recruitment to development, sales to marketing, event management to finance.
4. **Become A Master Of Collaboration:** Sustainability is complex, and requires systematic change and innovation. DMOs need to become masters of collaboration as they are highly skilled at bringing their community together to rethink, reimagine and regenerate their city, and its meetings and events industry. Destinations will become even more competitive by reimagining the role of their visitors from passive tourists, or event visitors, to active, temporary locals.

The research also collected the best ideas from destinations around the world to create a framework or set of recommendations for any DMO or municipality that wants to create or improve its sustainable destination strategy. The eight best ideas and recommendations are:

1. **Integrate The Sustainable Development Goals (SDGs):** The 17 SDGs provide a powerful framework for destinations to engage stakeholders, map current initiatives, improve strategy and report on achievements and impacts.
2. **Footprint And Set Science-Based Reduction Targets:** Understanding your social, economic and environmental impacts is no longer optional. Destinations need to measure the positive and negative footprint of their events and tourism sector, and set science-based targets to improve them.
3. **Engage Strategically With Stakeholders:** Stakeholder feedback and ideas need to be deeply embedded into all aspects of a destination's strategy and operations by a process of collaborative and inclusive engagement.
4. **Champion Certification:** In a market where clients and consumers are looking for sustainable brands, and where everyone is proclaiming their sustainability credentials, third party certification is critical. Destinations have a key role in endorsing and promoting trusted third party eco-labels.
5. **Promote The Food Revolution:** Local, organic, seasonal, plant-based healthy menus are part of better food chains. DMOs can inspire a change of habits and promote their destinations as leaders in the food revolution.
6. **Boost Demand:** Research and experience highlights that clients do not always ask for 'sustainability'. Destinations need to be more proactive, bold and creative in how they approach and engage clients with their sustainability pitch.
7. **Build An Authentic Story:** Telling your story is a critical part of integrating

sustainability into a destination brand. Pure 'green' advertising campaigns do not work. Destinations need to create movements based on a new story of purpose, authentic action and data.

8. **Report Impacts And Actions:** Sustainability reporting by destinations is not yet mainstream. Clear reporting of social, economic and environmental impacts, strategies and performance has the potential to better engage stakeholders, build trust and accelerate collaborative action.

The GDS-Index white paper contains a number of case studies from DMOs around the world to illustrate their planning and practical activity as sustainable destinations.

In November 2019 the GDS-Index published its rankings of 60 cities around the world (GDS-Index, 2019b) based on the following criteria, which have been developed with significant stakeholders including the Global Sustainable Tourism Council, the Social Progress Imperative and the Events Industry Council:

- Environmental strategy and infrastructure
- Social sustainability performance
- The strategy of the host city's convention bureau
- Industry supply chain support

Glasgow is the only UK city to feature in the top ten, aiming to become the UK's first carbon neutral city by 2030. It also hosted 25 energy, sustainability and carbon reduction-related conferences in the 2018-2019 financial year. The top ten cities in the GDS-Index rankings 2019 are shown in Table 7.1.

Table 7.1 GDS-Index Ranking of Sustainable Cities

Ranking	Destination	2019 Score
1.	Gothenburg	89.6
2.	Copenhagen	88.0
3.	Zurich	84.6
4.	Glasgow	78.5
5.	Aalborg	76.2
6.	Reykjavik	75.8
7.	Malmö	75.6
8.	Sydney	74.9
9.	Uppsala	74.3
10.	Melbourne	74.3

7.5.8 Examples of Destination, Venue and Event Organiser Responses to Sustainability

Destinations and venues increasingly recognise the importance of promoting their sustainability credentials. An article in the March 2019 issue of 'Exhibition News' describes Glasgow's focus on sustainability, including its status as the first city in the UK to join the Global Destination Sustainability Index, a Scandinavian initiative that ranks event destinations based on their commitment to establishing environmentally friendly practices (Glasgow, 2019). Glasgow Convention Bureau followed this up with the launch of its 'People Make Glasgow Greener' campaign. Aileen Crawford, Head of Conventions at Glasgow Convention Bureau, argues that event destinations need to highlight more than just their capacity to host events. She says: "Cities need to demonstrate how their destination adds value for delegates, our environment, and society overall".

In the 'Exhibition News' article, the Scottish Events Campus is quoted as follows: "All of our developments are considered with sustainability at the front of our minds. Our reduction in paper use has seen us replace traditional poster sites and signage with over 200 digital screens."



UK company WRAP (www.wrap.org.uk) works with governments, businesses and communities to deliver practical solutions to improve resource efficiency. It has launched the UK Plastics Pact with the ambition of making 100% of plastic packaging in the UK reusable, recyclable or compostable by 2025. The Association of Independent Festivals has been the first event industry body to support the campaign. Over 60 festivals have signed on to the AIF's 'Drastic Plastic' initiative, committing to ban single-use plastics from their event sites by 2021.

A number of high-profile events have announced a ban on single-use plastic, and a push for renewable energy, following a European Union policy change. Glastonbury Festival will prohibit single-use plastics from sale, as well as from being used backstage, in the production team, in catering and in the dressing room areas. Organisers of the Brighton Marathon have also stated that they plan to reduce significantly the amount of single-use plastics at the event.

There are many useful information tools and guides on event sustainability now available. The following web links are just a few of the possible options:

https://inside.fei.org/system/files/FEI_Sustainability_Handbook_for_Event_Organisers.pdf

<https://www.eventmanagerblog.com/event-sustainability-issues>

<https://helloendless.com/sustainable-event-trend/>

POSITIVE IMPACT EVENTS



Company Profile – Positive Impact Events

Positive Impact Events is a not for profit company established in 2004 to provide education and collaboration opportunities in order to create a sustainable event industry.

Since 2004 the world's understanding of sustainability has advanced. In 2016 the United Nations launched 17 Sustainable Development Goals which, with their over 200 associated indicators, are now recognised as the language of responsible business.

Positive Impact Events plays an active role in explaining how events can be used to achieve the Sustainable Development Goals - in other words, how events are a business tool and can be used to produce business results. For the last five years the global community of over 300 Positive Impact Ambassadors have shared best practice through a social media campaign on Earth Day with a reach of over 2 million (#CSRShareDay) and #Sharepositiveimpact, a year-round initiative to demonstrate practical actions event professionals can take to be sustainable.

Positive Impact Events has consistently delivered resources to support the education of the event industry. In 2018 this included a roadmap toolkit supported by the Society of Incentive Travel Excellence (Site) and an app to identify plastic use at events supported by Monterey County Convention and Visitors Bureau.

The main obstacle Positive Impact Events continually faces is the lack of event industry leadership in understanding the urgent need to act and having the courage to change their 'business as usual approach'. In order to address this challenge, since 2016 Positive Impact Events has been building strong relationships with the United Nations with the intention of involving the event industry in conversations with the United Nations and global business on strategies and collaborations to achieve the sustainable development goals. For example, in 2018 Positive Impact Events invited the Association of British Professional

Conference Organisers (ABPCO) to attend a United Nations Environment meeting on sustainability in the hospitality industry and create a report on what this could mean for the event industry.

During IBTM World 2018 Positive Impact Events led a delegation from the United Nations to present, meet association heads and build industry relationships. In 2019 at IMEX Frankfurt, Positive Impact, supported by Edmonton Tourism, facilitated the first ever Sustainability Policy roundtable and delivered a report on plastics, carbon and food waste policy to a number of United Nations bodies.

By the end of 2018 Positive Impact Events had a memorandum of understanding with the United Nations Environment and United Nations Framework on Convention on Climate Change (UNFCCC), an affiliate membership of the United Nations World Tourism Organization (UNWTO), and agreements with the United Nations Children's Fund (UNICEF) and the United Nations Sustainable Development Goals (UN SDG).

The need for strong relationships to be able to ignite and facilitate conversations about the role of events being a solution to achieving the sustainable development goals became increasingly clear in October 2018 when the United Nations Intergovernmental Panel on Climate Change (IPCC) report listed a number of suggestions to address climate change, including using technology for meetings rather than travelling to meet face-to-face.

In May 2019 the United Nations announced it would like to receive Acceleration Commitments from industry to understand how business and global government could take action to achieve the United Nations Sustainable Development Goals. The team at Positive Impact Events (with an office based in Manchester, an intern programme with Leeds Beckett University and a community of global ambassadors) understand themselves to be like a pebble in water, capable of making ripples beyond their size, and so, with funding from partners including IMEX, Cvent and Maritz, they will submit an 'Acceleration Commitment' to the United Nations which will be a roadmap for the role of events in achieving the UN's sustainable development goals.

www.positiveimpacetevents.com

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CHAPTER 8 BUSINESS ENVIRONMENT

8.1 Introduction

‘Events shape a destination’s identity, engender creative enterprise, stimulate innovation, facilitate knowledge transfer, engender professional development and augment the visitor economy.’ So says the introduction to a BVEP Policy Document entitled ‘Opportunities for Global Growth in Britain’s Events Sector’ (BVEP, 2016a). It goes on to say that ‘Britain plays host to an impressive number of high profile world events from major political, commercial, medical, scientific and educational conferences and trade fairs to leading edge cultural, sporting and music festivals. Events can play a major role in asserting Britain’s international trading strength, highlighting components of its emerging industrial strategy, its creativity and commercial

inventiveness and bringing the country together to present its intrinsic values.’

The Policy Document was prepared by BVEP in order to provide a clear view of both the key policies and new opportunities which BVEP’s partners believe will help Britain transition into a new global role post exit from the European Union. It builds on the manifesto produced by BVEP ahead of the UK general election in May 2015 and also incorporates issues identified in the BVEP Events Industry Referendum Impact Survey which was conducted in the summer of 2016.

A report drafted to support the results of this Survey (BVEP, 2016b) suggested that there is an

opportunity for the events industry to ‘position itself as an integral part of the broader trading nation that needs to re-define itself with the European Union and forge new trade agreements with other international markets. In other words, the future success of the UK events industry is also inexorably linked to the longer term impacts on the key industrial sectors it serves.’

This chapter will, therefore, look at the detailed opportunities for global growth in Britain’s events sector, Britain’s competitiveness (see also Chapter 3), research into the need for subvention funding, VisitBritain’s Business Events Growth Programme, and the potential for a ‘Global Era of GREAT Business Events across Britain.’

8.2 Opportunities for Global Growth in Britain's Events Sector

BVEP partners published 'Opportunities for Global Growth in Britain's Events Sector' in 2016 (BVEP, 2016a), focussing on the opportunities and challenges that lie ahead. This Policy Document also identifies where the sector should be supporting other common areas of interest identified by trade sectors associated with, or supported by, the creativity and innovation of the multi-faceted UK events business. The key recommendations and opportunities listed in the Policy Document are set out below:

1. Make a bigger role for government working with the events industry

Key Opportunities

- a. To increase the number of international events held in the UK
- b. To grow the number of UK domestic events held in the UK for both corporate clients and associations
- c. To raise the profile of the Events Industry Board to ensure more tangible cross-government department working to apply maximum government 'soft power' support for event bids and involvement of key government departments and Ministers in the process
- d. To place the use of events as a central part of the industrial strategy, international trade development, inward investment and business growth by promoting Britain as a world-class event destination
- e. To create a strong partnership with the Department for International Trade
- f. To increase the role and resource of VisitBritain in promoting overseas business

visits and events to Britain, fully integrating Events into the GREAT programme and showcasing Britain as a leading global destination for business, cultural and sporting events

- g. To promote the use of Britain's creative talent and event organising services to be exported worldwide
- h. To incorporate the events sector into the government's creative industries strategy

2. Grow infrastructure, enable greater access and increase investment

Key Opportunities

- a. To undertake a comprehensive review of existing capacity of conference and exhibition facilities with the objective to justify increased space in existing and new venues in order to grow capacity and enable Britain to compete with international competitors
- b. To encourage new investment by offering fiscal incentives, relaxing current planning regulations and ensure that current policy to free up public land includes local economic activity considerations, such as multi-event venues and the wider use of fixed-term temporary structures

Supporting Others

- c. To urge for the solution to provide more air capacity to link with major event destinations within Britain to be implemented as soon as possible
- d. To improve transport connectivity between ports of entry and event venues to ensure ease of access
- e. To encourage local authorities to provide city-wide support (such as security, infrastructure, accessibility, integrated

transportation packages) and more use of bespoke subvention packages (e.g. joint sharing of marketing costs with city venue owners)

3. Create a more competitive tax regime

Key Opportunities

- a. To reduce VAT levels on accommodation, conference and event services in line with European levels
- b. To reform the Tour Operator Margin Scheme to re-introduce a B2B opt-out option
- c. To incentivise inward investment in new and additional event infrastructure
- d. To provide tax incentives for hosting overseas buyers and conference attendees where events are designed to create and support export-led trade opportunities

Supporting Others

- e. To introduce allowances to businesses using events held in Britain to grow inward investment and exports
- f. To reduce Air Passenger Duty
- g. To reduce corporation tax

4. Avoid greater regulation

Key Opportunities

- a. To provide an innovative and flexible regulatory framework that stimulates productivity and efficiency
- b. To make movement of people engaged in the events sector as easy as possible, recognising their unique creative, logistical, marketing and service skills. In particular, to ensure that Britain's creative and production talents are not impeded from operating world-wide and that Britain can attract those same skills

- c. To ensure no additional bureaucracy in transferring goods and business samples to conferences and exhibitions in Britain and overseas
- d. Recognising the value to Britain's economy of business visitors attending business events in Britain, to facilitate their visits by not imposing any undue or onerous travel and entry restrictions
- e. To create a 'special events' visa (e.g. a 30-day conference visa) in order to provide a more positive welcome, supported by easier and better value online visa application services
- f. To reduce the cost and procedure for visa issuance to business travellers
- g. To adopt a system that creates minimal travel restrictions or costs of travel to events in Britain in relation to the present arrangements for the movement of delegates to and from events in Britain and overseas

Supporting Others

- h. To reform the Package Travel Regulations to remove from regulation B2B transactions with large corporate customers
- i. To reform ATOL licensing to create a level playing field between tour operators and airlines to exempt transactions between event management companies and large corporate customers

5. Support the industry and business sectors that sustain the Events Industry

Key Opportunities

- a. To demonstrate the role and contribution of the UK events sector in the global commercial and creative industries

- b. To ensure that the event industry in Britain is aligned more clearly with the key industrial sectors identified by the government and that the support it provides through the economic impact of its activity is positioned as an integral part of Britain's global commercial profile
- c. To re-evaluate the framework for continuing skills development and professional development within the events industry

Supporting Others

- d. To maintain and increase funding to enable continuing professional development and the attraction of international students to study and work in Britain
- e. To enable Britain's hospitality industry to retain and attract the resources it needs to provide first class international service
- f. By introducing an accommodation charter in order to facilitate forward booking accommodation for major events
- g. To maintain an approach that safeguards the social and economic impact of funding currently provided by the EU in key sectors (e.g. scientific research, agriculture, and the creative industries)
- h. Supporting other industrial sectors, especially where it affects Britain's main exports (such as automotive, food, aviation IT, finance, pharmaceuticals, professional services and new technologies), in order to ensure that these industries will continue to flourish and use events in Britain to showcase their products
- i. To ensure that the continued access of UK airlines to

European markets and the benefit of the Open Skies agreement and the EC Single European Sky initiative are retained.

Since the publication of this Policy Document in 2016, work has continued, both at government and sub-government levels, to ensure that the opportunities identified can be grasped and developed for the benefit of the UK events industry. For example, one of the outcomes has been the publication in 2019 of the government's 'International Business Events Action Plan' (key points of which are summarised in Chapter 4 of this report), while a framework for skills and professional development has been progressed (see Chapter 6) and significant activity to improve infrastructure and accessibility continues apace (see Chapter 7).

However, we operate in an extremely competitive global marketplace and it is clear that, in a number of respects, the UK still has substantial work to do to gain the competitive edge which will ensure that it achieves the level of success to which it aspires. The next section examines important areas of activity for the events industry with recommendations about how its competitive position may be improved.

8.3 EIB Paper on Competitiveness

The Events Industry Board (EIB) is an industry-led board composed of individuals and representative organisations from the events industry. The Board is an advisory body which provides government ministers and officials with guidance and feedback on how Britain may become a more competitive environment in order to attract, grow and create international events. (See Chapter 10 for more information on the work of the EIB).

In February 2017 the EIB published a 'Paper on Competitiveness' (EIB, 2017). The paper combines recommendations made by an EIB working group on competitiveness with those from a BVEP report on 'UK Subvention Policy and Bid Support Practices for International Conferences and Events' (BVEP, 2016c).

Key findings from this EIB paper include the following:

1. **Cost as a barrier to competitiveness**
UK locations are viewed as more expensive than counterpart European countries, specifically hotels, venues, restaurants and transport. In addition, the wider cost of doing business was comparatively high with Air Passenger Duty (APD), visa costs, and general taxation levels.
Recommendations:
 - a. Reduce VAT on conference services (for international visitors) and/or provide tax incentives for hosting overseas buyers and conference attendees, where events are designed to create and secure export-led opportunities
 - b. Reduce Air Passenger Duty
 - c. Provide easier, better value, online visa applications for short stays. Ideas include a 30-day conference visa for attendees or to introduce special event visas for attendees of business events and conferences where there are over 2,000 overseas delegates
 - d. Introduce an accommodation charter for forward-booking accommodation for large events.
2. **Subvention as a barrier to competitiveness**
UK offer packages were not considered comprehensive or sufficiently attractive when compared to other locations where evidence showed offers were seemingly financially more attractive and fully integrated. Feedback from those consulted by the working group focused on making locations more attractive rather than offering direct subsidies to event organisers.
Recommendations:
 - a. Joint sharing of event marketing costs with city venue owners
 - b. Encourage local authorities to provide city-wide logistical support: security, infrastructure, accessibility, and integrated transportation packages for event attendees
 - c. EIB Board members to note that the VisitBritain Event Support Programme (now known as the Business Events Growth Programme – see later in this chapter for details) is receiving financial subvention requests.
3. **Government support as a barrier to competitiveness**
The UK was universally considered well behind other competitor destinations across the international events stage. A stronger support from government was urgently required to strengthen bids including bid support letters, dignitaries at events, access to ministers and facilitating knowledge sharing were amongst the chief observations of those consulted.
Recommendations:
 - a. A government minister or appointed government czar to execute the events sector support requirement across government
4. **Infrastructure/Venues availability as a barrier to competitiveness**
Those consulted by the EIB working group identified that the UK only has two venues 'of scale' which, during prime time, are almost completely booked. The consensus was that this limited the opportunity for the UK to win and expand its international base of exhibitions and congresses at peak times. This is replicated amongst hotel room availability. Competitor countries are investing in new space, both in well-established event destinations and newly emerging destinations.
 - b. Ensure a more strategic approach to target industrial economic sectors, including working with delegates and ambassadors to optimise the sharing of knowledge and leaving a legacy and social benefits to the local community
 - c. Institute a national programme across the event support sector to cover quality, cleanliness, and visitor welcomes in restaurants, transport, and accommodation. Recognise the scope for improvement of service levels and conference and hotel facilities. Work with industry to improve skill levels and quality control (championed by government)
 - d. Government to provide senior officials for keynote speakers at high level conferences and use influence to deliver top industry leaders to key events, for example joint event opening with ministers, joint sessions at conferences.

Recommendations:

- a. Review the need for investment in additional and extended venue facilities: larger exhibition spaces and a bespoke international convention centre with associated conference-style hotels
 - b. Increase private sector investment by relaxing planning regulations and ensure current policy to free up public land is mixed between housing and local economic drivers including multi-event venues
 - c. Examine the feasibility of permitting wider use of fixed term temporary structures
 - d. Encourage the expansion of existing venues
5. **Destination Marketing as a barrier to competitiveness**
Feedback to the working group highlighted that successful destinations were often those with a clear destination strategy for all the key ingredients of the sector (i.e. exhibitions, congresses and conferences) and were subsequently more effective at producing a co-ordinated, comprehensive and integrated offering to potential customers. Similarly, it was felt that there was a limited buyer knowledge of the UK's offering outside London and the core cities, as well as buyer confusion around where to seek support when comparing national versus local government, national tourist organisations versus convention and visitor bureaux.
- Recommendations:
- a. Encourage a co-ordinated destination stakeholder approach combined with a passion to win the business
 - b. Carry out an assessment of the quality of Ambassador Programmes and the
- c. Review the consistency and quality of UK convention bureaux/DMOs and their approach to bid processes, procedures, materials, resources and commercial contacts, and share best practice
 - d. Introduce a referral scheme from destination to destination
 - e. Make available, in one place or portal, more information on where support can be accessed.
6. **Connectivity as a barrier to competitiveness**
The working group heard representations on the transport infrastructure, particularly: air, road, rail to core cities; and city transport systems, cost and availability.
- Recommendations:
- a. The government should maintain an ongoing focus on core infrastructure projects including Crossrail, HS2, air capacity
 - b. Ongoing investment in new routes and city planning.
- Some reference to subvention funding and support activity by the UK events industry is made above in the summary of the EIB paper on competitiveness. This, in part, draws on BVEP research into subvention published in 2016. The BVEP research has now been complemented by research published by the Department for Digital, Culture, Media and Sport (DCMS). The main findings from both pieces of subvention research are set out in the next two sections of this chapter.

8.4 BVEP 2016 Research into Subvention Funding

In 2016 the Business Visits and Events Partnership (BVEP) commissioned research into

subvention support and funding to update similar research carried out in 2011. The research was published as 'UK Subvention Policy and Bid Support Practices for International Conferences and Events' and a summary of key findings is given below (BVEP, 2016c).

Direct Conference Organisers

Subvention funding was an important influence on the choice of destination for international association and charity organisations. It was much less significant for corporations.

The commonest form of subvention received was a direct (cash) subsidy, followed by discounts on venue hire costs, contributions to event marketing and civic receptions. The amount of funding received was typically up to £50,000, but a quarter of respondents to the research had received between £50,000 - £100,000, and a small minority between £100,000 - £250,000.

Just over a fifth of conference organisers contributing to the research had been involved in bids to attract conferences to UK cities and destinations in the last two years. Among these, 18% indicated that bids with which they had been involved had gone to overseas destinations/venues principally because they were able to offer greater subvention and/or in-kind support.

Organisers identified that it was important to have the right combination of subvention (particularly in terms of assistance with venue hire costs), infrastructure, welcome, and convention bureau support. One organiser also commented: "The most important thing is that all stakeholders in the destination need to be on board with the bid – and critically really "WANT" the business ... a joined up approach will undoubtedly win the confidence of the event buyer who is

placing the business.”

The UK destination that was seen by organisers as leading the way in the provision of subvention funding was Glasgow. This was followed by Liverpool and, to a lesser extent, Belfast.

Professional Conference Organisers

The presence of event and bid support, such as subvention, was important for the majority (84%) of professional conference organisers (PCOs) in their bid preparation for international conferences. PCOs particularly look for destination support in the form of organising/funding familiarisation and site visits, as well as contributions to funding elements of the conference including civic receptions. Subsidies on venue hire costs and direct cash funding were also frequently sought.

PCOs noted an upward trend over the past five years in terms of subvention requests from international associations.

PCOs also confirmed experiences of events being lost to overseas destinations due to a lack of subvention funding in the UK. Cities identified as leading the way in developing a competitive edge through subvention include Barcelona, Berlin, Geneva, Singapore, Seoul, Vienna, Melbourne, Dubai, Frankfurt, Madrid and Munich. Specific examples of good practice cited were favourable VAT arrangements offered by Canada and Mexico, and Australia’s easier online visa application for conference attendance.

One PCO made the point that “successful bids generally require the support of industry and research and development leaders in the client’s specialist area. This means sponsorship support from industry and access to leading speakers in R&D. It also means government

involvement to demonstrate their commitment to the specialism in question, often involving public engagement platforms during the congress.”

PCOs suggested a number of changes needed by UK convention bureaux and national government agencies to improve the chances of success when bidding for international conferences and events. Ideas include having a strategic approach to target sectors; better research into the support needs of international association clients; better funding for convention bureaux and national agencies, with expert staff; improved visa and VAT arrangements; the crucial importance of a package of total support.

Destination Marketing Organisations

Destination marketing organisations reported that requests for subvention funding from international associations had increased over the last five years, reflecting a robust (growing) association marketplace and/or an increasing expectation by organisers of subvention assistance.

The average subvention budget was £201,000 – this was higher among international destinations (an average of £245k compared to approximately £68k for UK destinations). There were significant variations with budgets ranging from £20k to £548k. The average level of support per event was approximately £6,700 – slightly higher in the UK (£7,200) than internationally (£6,500).

On average, destinations supported 40.5 events through subvention funding / in-kind support in the last year. This was higher among international destinations (54.5 events) and lower among UK (14.3).

Destinations highlighted a number of elements that were important to approach subvention funding.

These included provision of wide-ranging types of assistance, working with delegates, the importance of partnerships and ambassadors, and the wider potential role of conferences and subvention.

Success and good practice were as a function of a number of factors including significant budgets, high level government support, and partnerships (particularly with venues).

8.5 DCMS Research into Subvention Funding for International Business Events

In 2019 the Department for Digital, Culture, Media and Sport (DCMS) published new research into subvention funding entitled: ‘The potential impact of Government subvention funding on International Business Events’ (DCMS, 2019).

Key discussion points and recommendations from the report are listed below:

1. How important is subvention to decision making?

Overall, evidence suggests that subvention support is a ‘nice to have’. It can sometimes sway a decision for one city over another, but robust evidence that it has been key in changing the location decision of event organisers is scarce. Before any other factors are considered, associations typically set an initial geographical scope based on where members, expertise in their field, policy makers and/or sponsors are located. Within this broad geography, a location is chosen with reference to other factors – ease of access, suitability of venues and value for money being key. A subvention is part of this value for money criterion. While the formal definition of a subvention implies a transfer of funds to the event organisers, the provision of discounts or free passes for local transport or childcare have a very similar effect.

There is limited evidence to suggest that UK destinations are losing a number of bids because of subventions elsewhere. There is also some evidence to suggest that some events expect a subvention and that UK cities are choosing to not bid for certain events due to the lack of subvention funds.

The offer of a subvention appears to have greater impact on the destination decision for smaller conferences because it forms a more significant percentage of the overall costs. For larger conferences, a subvention is seen as more of a goodwill gesture by sending a sign that they are valued.

There are, even with this limited evidence, some caveats. For the most part, available evidence on the impact of subventions comes from either the destinations who tend to manage and award subventions to events or the event organisers who are themselves beneficiaries. It is very challenging to see how independent evidence of impact can be derived. In principle, this might be achieved by:

- Comparing the success of two or more similar destinations in securing larger international events when some benefit from subvention funding support and others do not, and/or:
- Undertaking a historical comparison of the track record of destinations in securing larger international events as their access to subvention funding is withdrawn (something which has occurred/is occurring in Scotland, Manchester and Liverpool among others).

If there is limited information on the impact of a subvention on attracting sizeable international business events to the UK, the researchers found no evidence on the impact in the longer term.

2. Is there a market failure rationale for subvention?

The research highlighted a lack of evidence in relation to the market failure rationale that the introduction of a subvention fund might address. There are a number of types of market failure that may arise in relation to business events, including imperfect information about a destination's offer and/or externalities. Cash subsidies or in-kind support to attract an event could be a way of supporting positive externalities provided by certain events e.g. positive community impacts. They could also be a way of mitigating negative externalities e.g. concerns over security or regulatory change. Some forms of in-kind support appear to have a stronger and more direct market failure rationale than cash subsidies as they focus on directly addressing the failure:

- For example, marketing support is directly overcoming the issue of imperfect information by providing information about a destination to new markets and each event can already demonstrate potential benefits from their existing market penetration. Current event support has to be undertaken within year so it favours short-term activity but a longer-term support could encourage more strategic marketing activities
- Site visits and ambassador programmes both directly address issues of imperfect information.

A more embedded and sophisticated form of support to build markets will deliver more durable impacts and be less susceptible to simple competitor responses – for example, there would be nothing to stop other competitor venues from introducing their own subvention (or increasing levels of support in existing funds) and the potential impact of the subvention would be nullified.

3. Is subvention needed given the current UK business tourism market?

Unfortunately, there is remarkably little basic information on the nature of the business events market, particularly the number of events held, by type and size and nature of delegates attending events. Robust data on how many events were held in the UK last year that meet the DCMS draft qualifying criteria is not available. More relevant to assessing the potential market for the introduction of a subvention would be the number of such qualifying events that considered UK venues and then issued requests for proposals (RFPs).

ICCA data on international association events tends to be reliant on self-reporting and, as such, may be an under-representation of what is happening on the ground. Although data is available from the International Passenger Survey (IPS) on the number of business event visits, this is not broken down by type or size of event.

It is unclear the extent to which individual destinations are currently reliant on domestic and/or international events. The researchers are aware that some venues consider themselves to be operating only in a national market. This is important given the large number of new venues that are coming on stream and will be, presumably, competing in the same market. The only available information on this is from the 'UK Conference and Meeting Survey' which reported in 2017 that just 12% of UK venues hosted a significant proportion (more than 10%) of their conferences that were international.

There is some evidence to suggest that UK venues are likely to be looking to host more international conferences in the future, as the UK market grows increasingly competitive as new venues come on

board. However, there is no detailed baseline data on the number of large (500+ delegate) international conferences in the UK. It is also not known how many bids are lost by UK destinations (either because of a lack of subvention or for other reasons).

There is some anecdotal evidence to suggest that DMOs are more likely to be put off bidding for events in the first place when they believe some form of subvention would be necessary, thereby focusing their resources on more 'winnable' events.

Recommendations

In view of the above and the evidence presented, the report makes the following recommendations:

1. The limited available evidence does not provide a clear-cut case for the introduction of a subvention fund for the UK. Whilst there is evidence that some associations expect a subvention (and so having such funding may make the difference to hosting this type of event), it is not clear that the UK is losing a substantial number of events to this reason alone:
 - a. A concern expressed by some that this is a dangerous step into a potential bidding war. Subsidies would escalate the costs of securing international events and is easily countered by other destinations introducing or increasing their own levels of support
 - b. Having said this, there is some anecdotal evidence that relatively small amounts of subvention e.g. £3-£5 per overnight stay (or the equivalent hosting of a £24k reception for 3,000 delegates on a 2-night stay) can factor into the value for money calculation and help secure an event
2. The literature highlights that supporting destinations to build a strategic rationale for the location of events is more durable than short-term subvention support
 - a. Focusing investment on the capacity of destinations to build a more international dimension will have greater long-term success and investment in the developmental side is less easy for UK competitors to respond to
 - b. Many UK destinations lack capacity to bid for international events and some reported difficulties accessing the current VisitBritain funding due to time pressures and the administrative overhead required
3. Support to grow existing venues e.g. marketing support, has a stronger market failure rationale than cash subvention, as it directly addresses issues of information failure:
 - a. The current VisitBritain fund for growing events has a number of limitations which a new fund should overcome. Currently spend needs to be in a year, which is a significant limitation to events, because often they cannot be marketed until the previous event has finished. Other issues highlighted include the lengthy process and timetable for drawing down the support
4. If the decision to subvent new events is made, the following should be taken into account:
 - a. It is essential that the fund focuses on the international market and the researchers suggest setting the proportion of international delegates at a minimum of 60% and potentially up to 80%
 - b. DCMS should consider more flexibility in the size of event supported depending on the event meeting other objectives. For example, by supporting smaller events which are particularly prestigious or of particular value (e.g. potential for future growth through strategic link to research strengths), or offer a durability that means a larger number of international delegates visit over time
 - c. The amount of subvention should remain modest to discourage a race to the bottom. Within Europe, cities which offer subvention offer around £3-£5 per delegate per night, equating to around £18k-£20k for a 2-night conference attracting 3,000 delegates
 - d. Subvention should only be made available if there is just one UK destination bidding for the event.

Central government subvention funding and support (as opposed to support that may be offered by local authorities and similar local/regional entities) is channelled through VisitBritain's 'Business Events Growth Programme', and this is described in the next section.

8.6 VisitBritain's Business Events Growth Programme

The Business Events Growth Programme (formerly the Event Support Programme) (VisitBritain, 2019) forms part of the government's commitment to build the business events sector, supporting the attraction of international business events which align with the government's priority industry sectors, and growing the international profile of business events in the UK.

VisitBritain has been tasked by government to promote business event tourism through the establishment of a Business Events Growth Programme for winning international events to the UK, and developing and internationalising growth events already in the UK.

Types of event support

The Business Events Growth Programme offers three types of support:

- Bid Enhancement & Support for the winning of new international business events for the UK
- International Delegate Growth to support the growth of existing business events in the UK
- Government Advocacy to support the UK's business events industry. VisitBritain and the Department for Digital, Culture, Media and Sport (DCMS) can provide Government Advocacy (soft power) to support the UK's business events sector, by working with cross-government partners.

In the financial year 2019-20 VisitBritain is offering grant-funding of up to £20,000 per event under the following strands of the Business Event Growth Programme: Bid Enhancement & Support and International Delegate Growth. It welcomes applications from various types of organisations, including but not limited to: event organisers, convention bureaux / destination management organisations, universities or associations.

Bid Enhancement & Support

Bid Enhancement & Support can be applied for in one or two ways – financial support or Government Advocacy (soft power support).

Financial support is available up to the value of £20,000 to support cities in bidding for international business

events. Funding granted will assist in bid costs for an international business event that is not currently held in the UK, to help boost the potential of winning the event for the UK.

Funds could be used to support the following, indicative activities:

- Support the bid pitch, including costs of producing the pitch or supporting the attendance of one destination representative at the pitch, up to a recommended value
- Towards sales and marketing activity on territory at the bid pitch, to increase awareness and encourage voters to favour the UK bidder
- Towards media/social media activity in support of the bid, such as industry/sector channels and networks relating specifically to the sector of the event being bid for
- A contribution towards communications and digital activity, website, live streaming, social media, film, webinar, e-newsletters or other content to support the production of a bid
- A contribution towards translation costs of a bid
- Support towards a site visit of the shortlisted UK destination.

These serve as examples and VisitBritain welcomes suggestions from applicants on other forms of support that could enhance bidding and increase the opportunity to win.

Various criteria require to be met by bid applicants, one of which is for the event to align clearly with one of the following priority sectors for UK industry:

- Advanced Manufacturing
- Aerospace
- Automotive

- BioEconomy
- Consumer
- Creative
- Education
- Energy
- Engineering
- Financial Services
- Food & Drink
- Health & Life Sciences
- Infrastructure
- Marine
- Space
- Sport
- Smart Cities
- Technology

The International Delegate Growth strand of the Business Events Growth Programme offers financial support, normally up to a maximum of £20k per event, to support the following, indicative activities:

- International delegate marketing campaign through digital channels
- International delegate marketing through trade media channels

Government Advocacy

VisitBritain and DCMS make requests to the relevant government department that could aid the winning of international business events to the UK, or to grow the international profile of existing UK business events.

Types of advocacy support include:

- Letters of support from Ministerial or Senior Government figures
- Attendance at an international event by a Government Minister or influencer (e.g. meeting a bid committee)
- Hosting a reception for event organisers in the UK to promote the UK offer
- Keynote speech
- Utilising the ambassador networks

- Inbound Missions, and diplomatic missions overseas, through the Department for International Trade's sector teams.

Further support could also involve the global **GREAT Britain campaign**, through branding and marketing support. This campaign showcases the best of what the UK has to offer to inspire the world and encourages people to visit, do business, invest and study in the UK. It is the government's most ambitious international promotional campaign ever, uniting the efforts of the public and private sectors to generate jobs and growth for Britain.

8.7 A Global Era of GREAT Business Events across Britain and Northern Ireland

There is much evidence now and a growing appreciation of the substantial economic and social contribution made by the UK events industry. Furthermore, business events facilitate trade and inward investment, contribute to global knowledge and research and showcase UK innovation. The country's image is strengthened by the hosting of international events and its soft power projected onto a global stage.

This is all the more important as the UK enters into new trading relationships with the European Union and seeks new trading relationships around the world.

In order to promote a strong message that the UK is the host destination for major international conferences, exhibitions and trade fairs, another initiative is currently being considered (February 2020) to communicate the diversity, volume

and value of individual events being held in destinations across Britain between 2020-2025.

The intention is to build on the highly successful messaging campaign 'A Golden Decade of Sporting Occasions' which trumpeted the international sporting events that took place in Britain prior to and after the 2012 Olympics.

Purpose

Such a programme would serve a number of purposes:

- To show that the UK is open for global business and is a destination where the world meets
- To illustrate the role that business events have in the UK's global positioning as a destination of choice for world-class events, especially events that showcase the nation's commercial, engineering, scientific and research capabilities in the key industrial sectors identified by the Department for International Trade (DIT) as:
 - Advanced Manufacturing;
 - Aerospace
 - Automotive
 - BioEconomy
 - Consumer
 - Creative
 - Education
 - Energy
 - Engineering
 - Financial Services
 - Food and Drink
 - Health and Life Sciences
 - Infrastructure
 - Marine
 - Space
 - Sport
 - Smart Cities
 - Technology

- To focus also on events which showcase the sectors that have received a sector deal as part of the Government's Industrial Strategy (BEIS, 2017), namely:

- Automotive
- Creative Industries
- Artificial Intelligence
- Construction
- Nuclear
- Aerospace
- Rail

One of the key objectives of any such communication is to create a strong internal message that will emphasize to government ministers and their officials the importance of securing and hosting international gatherings, summits, symposia and forums on global issues in the UK.

Table 8.1 provides examples of major international events taking place in the UK in 2020-2021, illustrative of the diversity, volume and value already secured (VisitBritain, 2020). The colours in the table indicate: orange – government event / summit; yellow – exhibition; blue – conference/congress.

Table 8.1 A Sample of Major Business Events in the UK in 2020-2021

Event Name	Start Date	End Date	Location	Venue	Key Sector	Event Size (delegates/ Visitors)
UK-Africa Investment Summit 2020	20/1/20	20/1/20	London			
Spring Fair	1/2/20	6/2/20	Birmingham	NEC	Consumer	52,500
ICE	4/2/20	6/2/20	London	ExCeL	Creative	36,600
Pure London	9/2/20	11/2/20	London	Olympia	Consumer	17,500
KBB	1/3/20	4/3/20	Birmingham	NEC	Consumer	16,400
Crufts	5/3/20	8/3/20	Birmingham	NEC	Consumer	5,500
European Association for the Study of Liver	15/4/20	19/4/20	London	ExCeL	Health & Life Sciences	10,000
IFGS 2020	20/4/20	21/4/20	London	Guildhall	Financial Services	3,000
Conference of the European Wound Management Association	13/5/20	15/5/20	London	ExCeL	Health & Life Sciences	4,082
World Biomaterials Congress	19/5/20	24/5/20	Glasgow	SEC	BioEconomy; Engineering	3,500
IFSEC International	19/5/20	21/5/20	London	ExCeL	Security & Defence	35,296
Scientific Meeting of the European & International Society of Hypertension	29/5/20	1/6/20	Glasgow	SEC	Health & Life Sciences	3,500
European Academy of Allergy and Clinical Immunology	6/6/20	10/6/20	London	ExCeL	Health & Life Sciences	8,000
The CIPD Festival of Work	10/6/20	11/6/20	London	Olympia	Education; Other	7,000
Forum of European Neuroscience Societies	11/7/20	15/7/20	Glasgow	SEC	Health & Life Sciences	7,000
IEEE World Congress on Computational Intelligence	19/7/20	24/7/20	Glasgow	SEC	Technology	2,000
Farnborough International Air Show	20/7/20	26/7/20	Farnborough		Aerospace	80,000
European Conference on Educational Research 2020	25/8/20	28/8/20	Glasgow	University of Glasgow	Education	2,500
XXXIII Congress of the International Academy of Pathology and 32nd Congress of the European Society of Pathology	29/8/20	2/9/20	Glasgow	SEC	Health & Life Sciences	3,000
18th International Conference for Women Engineers and Scientists (ICWES18)	11/9/20	14/9/20	Coventry	University of Warwick	Advanced Manufacturing; Aerospace; Automotive; Education; Energy; Engineering; Health & Life Sciences; Infrastructure; Smart Cities; Technology	360
Southampton Boat Show	11/9/20	20/9/20	Southampton		Marine	20,500

Table 8.1 A Sample of Major Business Events in the UK in 2020-2021 (continued)

Event Name	Start Date	End Date	Location	Venue	Key Sector	Event Size (delegates/ Visitors)
World Aviation Festival	23/9/20	25/9/20	London	ExCeL	Aerospace; Technology	4,700
International Golf Travel Market	19/10/20	22/10/20	Newport	ICC Wales	Sport	1,300
World Travel Market	2/11/20	4/11/20	London	ExCeL	Consumer	56,500
Euro Bus Expo	3/11/20	5/11/20	Birmingham	NEC	Automotive	9,300
COP 26	9/11/20	19/11/20	Glasgow	SEC		30,000
14th Annual Congress of EAHAD (European Association for Haemophilia and Allied Disorders) 2021	(TBC) February 2021		Manchester	Manchester Central	Health & Life Sciences	1,500
International Food and Drink Exhibition	22/3/21	24/3/21	London	ExCeL	Food & Drink	28,350
European Congress on Work and Organizational Psychology	26/5/21	29/5/21	Glasgow	SEC	Education	2,500
Annual Congress of the European College of Sport Science	7/7/21	10/7/21	Glasgow	SEC	Sport	3,000
International Conference on Composite Materials - ICCM	1/8/21	6/8/21	Belfast	ICC Belfast	Advanced Manufacturing;	
Engineering	1,800					
Congress of the European Society of Cardiology - ESC	28/8/21	1/9/21	London	ExCeL	Health & Life Sciences	35,000
Annual Congress of the European Association for Behavioural and Cognitive Therapies -EABCT	8/9/21	11/9/21	Belfast	TBC	Health & Life Sciences	1,500
Defence & Security International	14/9/21	17/9/21	London	ExCeL	Aerospace; Marine; Technology; Security & Defence	38,000
G7 Summit	TBC		TBC			

Source: VisitBritain Business Events

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CHAPTER 9

PLACES

9.1 Introduction

This chapter is based on the fifth of the five foundations in the government's industrial strategy – Places – with its aim of ensuring that we have prosperous communities right across the UK. The chapter provides national and regional/local perspectives on the work being done to attract and stage successful events so that communities can benefit from such activity. It describes the marketing and event support strategies of the individual countries of the UK, as well as VisitBritain's activity on behalf of the UK as a whole. It details the work and the changing roles of destination marketing organisations (DMOs), representing individual cities and, in some cases, regions of the UK – illustrated with case studies from three of the leading city destinations. It also explores issues confronting destinations around visitor taxation.

EVENTS ARE

GREAT

BRITAIN & NORTHERN IRELAND



9.2 United Kingdom – VisitBritain

VisitBritain (VB), funded by the GREAT Campaign and by the Department for Digital, Culture, Media and Sport (DCMS), is focussed on raising awareness with buyers and organisers to consider the UK for business events. Started in 2016, it is now in its fourth year with a strategy designed to increase business wins to the UK and support the key pillars of the British Tourist Authority's corporate strategy:

Figure 9.1 A Creative from VisitBritain's Events are GREAT Campaign



Source: VisitBritain Business Events

- **Growing value** – by targeting the high spend segment afforded by business events. Just a single business event win can have a large, concentrated economic impact
- **Improving productivity** – business events are year-round, but with high peaks of activity in spring and autumn. Capacity mapping can help the events industry to fill gaps in occupancy more effectively
- **Enabling dispersal** – business events activity is very concentrated in London. English regional destinations need support to be more competitive and to access international markets
- **Being the expert body** – business events are a major priority for the UK government. They can also act as an enabler for the government's industrial strategy and a catalyst for trade and investment in priority sectors.

9.2.1 VisitBritain Strategy

The strategy supports the government's industrial and political focus, targeting selected major high impact events that align with government priorities, the Industrial Strategy and its four Grand Challenges (the four Grand Challenges identified in the Industrial Strategy are: Artificial Intelligence and data, the ageing society, clean growth and the future of mobility). The key focus is on high volume and high impact events.

The strategy supports UK strategic partners: London, Scotland, Wales and Northern Ireland, adding value to assist in the delivery of strategies across the UK. VisitEngland is supported by VisitBritain to deliver the Business Events Strategy for England.

How:

- Raising international awareness and consideration

- Through the provision of workshops/ research/ intelligence
- Providing routes to international market
- Business Events Growth Programme to support bidding and growing international events

9.2.2 Events are GREAT Campaign

VisitBritain's international Events are GREAT campaign raises awareness and consideration of the UK as a great place to hold business events and incentives (VisitBritain, 2020). It targets international associations together with corporate and incentive buyers through a range of channels including events, content, digital marketing, social media, sales missions, and direct account management. Figure 9.1 shows part of the creative used in the Events are GREAT campaign.

9.3 England - VisitEngland

VisitEngland's (VE) business events strategy is designed to support the key pillars of the British Tourist Authority's corporate strategy of growing value, improving productivity, enabling dispersal and being the expert body (as detailed in 9.2 above).

9.3.1 VisitEngland Strategy

VisitEngland's topline strategy has two key elements:

1. High impact events aligned with the Government's industrial and political focus
 - a. Targeting and attracting selected major high impact events that align with government priorities (Department for International Trade (DIT) sectors, Industrial Strategy and Grand Challenges)
 - b. High volume delegate attendance events – and

2. Targeting events that fit with regional destination strategies
 - a. Enabling regional English destinations to win more international MICE events
 - i. Raising international awareness (brand and content)
 - b. Building destinations' capacity
 - i. Workshops to upskill and share best practice
 - ii. Research to give insight into key trends, buyer decision-making and delegate expenditure
 - c. Providing routes to market
 - i. Sales platforms
 - ii. Showcase events

9.3.2 Engagement with DMOs: new MeetEngland Board

Another key priority for VisitEngland is to review and improve the ways of working across England's destination marketing organisations (DMOs), creating a joined-up approach to the implementation and delivery of the VE strategy.

Purpose

- Review and agree strategic approaches to developing opportunities that will win more business events for England
- Look ahead to ensure that the direction of travel matches strategy, identified priorities and emerging trends
- Agree VE support role in DMO international strategy
- Foster collaborative ways of working, effective communication and sharing of learning and best practice between destinations and regions across England

- Identify, create and sustain new ways of working to support strategy implementation
- Provide a channel of communication between VE, destinations and partners
- Identify best practice areas and share learnings to benefit all members.

9.3.3 Audience Focus

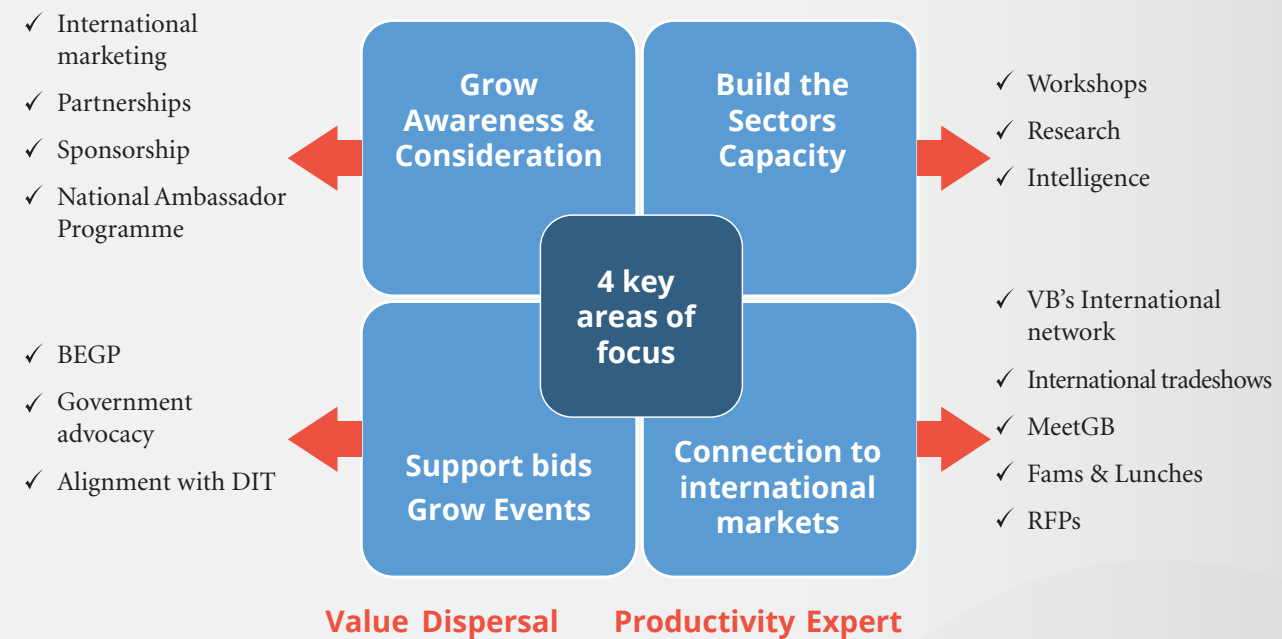
VB/VE's primary target audience is large to mid-sized international associations. This sector attracts multi-day delegates who often extend their stay beyond the conference and create significant economic impact. Specifically this means:

- Identified events from the ICCA database that are due to rotate into Europe and are aligned to DIT growth sectors
- International associations that are headquartered in North America and Europe
- Associations that have international growth strategies, creating opportunity for the UK and England
- Domestic associations that have the ability to grow international delegate attendance to UK events e.g. medical conferences that appeal to an international audience
- Influencers of international business events – ambassadors, connectors and strategic partners.

9.3.4 Enablers

The following will be used as 'enablers' in delivering VB's and VE's strategy:

- Brand positioning – developing a compelling proposition for both Britain and England
- Audience tools – creating more sophisticated profiles and customer journeys of key target segments

Figure 9.2 Delivering the Strategy

Further information: www.visitbritain.org/business-events

- CRM (customer relationship management) – an essential tool to track interventions, manage relationships and measure success
- Capacity mapping – in order to gain a clear understanding of where availability exists so as to support the dispersal of events
- Digital platform – needed to fulfil all activity, and to include an RFP (request for proposal) tool in order to disseminate business leads to the industry
- Partnerships – building relationships with strategically important players in the global meetings industry
- Evaluation – evolving 'best in class' new methodology and improving delivery of ROI

The delivery of the VB/VE strategy is illustrated graphically in Figure 9.2.

9.4 Northern Ireland

The Meetings, Incentives, Conferences and Events / Exhibitions (MICE) sector is a significant contributor to the economy of Northern Ireland. Tourism Northern Ireland's (Tourism NI) brand proposition demonstrates what is offered to MICE buyers when choosing to meet in Northern Ireland:

- An easily accessible destination – compact, walkable cities
- Memorable experiences
- Stunning landscapes
- Locals with plenty of stories to tell

The key selling points for Northern Ireland are:

- Home of Game of Thrones®
- Birthplace of Titanic

- “The World Capital of Golf”
- The world's best food destination
- ICC Belfast – world class convention centre

Tourism NI supports and works with both Visit Belfast and Visit Derry to secure international and national conferences for the region, delivering bed nights and spend for the economy. Northern Ireland is #incentiveready and Tourism NI works closely with local experiences and accommodation providers to create inspirational incentive experiences aligned to its key markets.

Alongside key partners such as Meet in Ireland and VisitBritain, Tourism NI seeks to provide useful industry engagement platforms for achieving success in the lucrative MICE market.

9.4.1 Meet in Ireland

Tourism NI works in partnership with Failte Ireland to promote the island of Ireland as a MICE destination overseas under the Meet in Ireland brand. There are several opportunities through this marketing platform for Northern Ireland industry to reach global MICE buyers, including attendance at international MICE trade shows such as IMEX Frankfurt, IMEX America, ibtm WORLD as well as several GB platforms such as 'Ireland meets the Midlands' and 'Ireland meets the West End'.

9.4.2 Business Tourism Familiarisation Trips

The Business Solutions team at Tourism NI hosts a series of business tourism familiarisation trips throughout the year, in partnership with DMCs and VisitBritain, to identify key business tourism buyers from around the world who can potentially deliver visitors to Northern Ireland.

Further information: <https://tourismni.com> ; <https://discovernorthernireland.com/incentiveready/>

9.5 Scotland

9.5.1 VisitScotland Events Directorate

VisitScotland's Events Directorate is responsible for supporting and developing Scotland's events industry and its wide and diverse events portfolio. It focuses on three main areas:

1. Building on its previous work and the legacy of 2014 to attract, sustain and develop major events, festivals and business events and maximise their impact
2. Leading and advising the events industry, providing information and training, sharing best practice and

working with the industry to focus on quality delivery

3. Using events to maintain and enhance Scotland's international reputation, influencing partners to develop Scotland's infrastructure.

It plays a key role in the implementation of the national events strategy 'Scotland: The Perfect Stage' by continuing to generate, bid for, attract and sustain sporting and cultural events which helps drive tourism and create international profile for Scotland. It also drives business events such as corporate meetings, incentive groups, conventions and exhibitions into Scotland from around the world. Importantly, it is committed to ensuring Scotland maintains its international reputation for delivering high quality events by working to develop capacity, knowledge and partnerships to strengthen the Scottish events industry.

The directorate is made up of three distinct departments:

- i. EventScotland
- ii. Development – Events Industry
- iii. Business Events.

9.5.2 EventScotland

Established in 2003 by the Scottish Executive and VisitScotland after the need for a single agency to coordinate across departments, agencies, governing bodies and rights holders when bidding for major events was identified, EventScotland is working to make Scotland the perfect stage for events. By developing an exciting portfolio of sporting and cultural events it is helping to raise Scotland's international profile and boost the economy by attracting more visitors. EventScotland leads on all aspects of bidding, investment and support for major sporting and cultural events as well as evaluating their impact. It ensures Scotland's events

portfolio has core events each year which are unique to Scotland and are embedded in Scottish culture covering sport, the arts and heritage.

EventScotland delivers the following funding programmes:

- International Events Programme
- National Events Programme
- Beacon Events Programme
- Scottish Clan Events Fund
- Scotland's Winter Festivals
- Themed Years Events Funds

9.5.3 Development – Events Industry

The Development Team incorporates Themed Years, Events and Exhibitions, Growth Fund and Events Industry Development. It manages VisitScotland's collaboration and support of the events industry and wider events economy with a focus on:

- Partnerships and Collaboration
- Education and Knowledge Sharing
- Quality Organisation and Delivery

All activity is aligned in support of the national events strategy. The team's responsibilities include providing a lead on event industry engagement and development; delivery of Scotland's Themed Years; development and delivery of initiatives and activity that help develop the events sector; delivery of flagship industry events including VisitScotland Expo and Scottish Thistle Awards, the National Events Conference and a year round seminar programme and the VisitScotland Growth Fund.

Future events

For over 15 years, EventScotland has been supporting and championing Scotland as the perfect stage for events, making a significant

Figure 9.3 Glasgow 2018 – George Square



contribution to the country's tourism sector and creating sustainable economic growth. It has supported the country in securing and hosting some of the world's biggest events including the 2003 MTV EMAs, the 2014 Commonwealth Games and The 2014 Ryder Cup as well as the 2015 Turner Prize, the 2015 World Artistic Gymnastics Championships, and inaugural European Championships 2018 with co-hosts Berlin.

Scotland's proven expertise in delivering world-class and ground-breaking events will see it host a number of major international events in the coming years, including:

- The 2019 Solheim Cup
- IFSC European Championships Lead and Speed 2019
- Tissot UCI Track Cycling World Cup 2019
- LEN European Short Course Swimming Championships 2018
- World Men's Curling Championship 2020
- UEFA EURO 2020
- Women's British Open
- The 150th Open
- Sprint World Orienteering Championships 2022

- 2023 UCI Cycling World Championships

Scotland's successful programme of Themed Years continues with The Year of Scotland's Coasts and Waters in 2020, a year that will spotlight, celebrate and promote opportunities to experience and enjoy Scotland's unrivalled Coasts and Waters, encouraging responsible engagement and participation from the people of Scotland and our visitors. In 2022 it will be the Year of Scotland's Stories.

Further information:
www.eventscotland.org

9.5.4 Visit Scotland Business Events

Since 2003, VisitScotland Business Events (VSBE) has been the dedicated resource within Scotland for the MICE/Association/Corporate and Incentive markets. As part of the national tourism organisation (NTO), which in turn reports to the devolved Scottish Government in Holyrood, VSBE is the lead agency and brand for the marketing, positioning and promotion of Scotland as a destination for Business Events.

Activity includes sales missions, desk-side appointments, sales

and PR agency representation in the five main markets, and major presence under the Scotland brand at the key tradeshow of IMEX, IBTM and IMEX America. All of VSBE's activity in Business Events is designed to add value to city, regional or venue activity, be it sales and marketing, national trade show presence (versus city or hotel chain presence), or simply a Scottish context for local bids. Key markets where VSBE undertakes proactive activity under the Scotland brand include USA, Canada, Germany, France and Spain.

VSBE broadly distinguishes between the Associations market and the Corporate and Incentive Market. For Associations at a UK, European or global level, VSBE works in close partnership with long-established (and local authority-funded) city convention bureaux (CCBs) of Edinburgh, Glasgow, Dundee and Aberdeen. These CCBs and their principal venues such as EICC (Edinburgh), SEC (Glasgow) and P&J Live (Aberdeen) retain the lead remit of the 'city sell', including researching, bidding for and ultimately winning association congresses aligned to their local strengths and credentials. VSBE supports the CCBs with national messaging, context, branding and positioning, including access to ministers and soft or hard support on an ad hoc basis.

VSBE works directly with the non-urban academic centres of excellence such as the University of St Andrews, the University of the Highlands & Islands (Inverness) and the University of Stirling. The cities operate Ambassador Programmes going back to the late 1980s, with VSBE operating a complementary national programme in the format of an academic talk series called Innovate The Nation.

VSBE brings together all of Scotland's regional and city strengths

under an identifiable brand and one voice using the Legends digital campaign. VSBE is embedded with key stakeholders in Scotland including Scottish Government Directorates, Scottish Enterprise, Scottish Development International, and other public or private sector groups invested in Scotland's industrial and knowledge economy. VSBE has strategic partnerships with key international business events bodies focused on the associations market including PCMA and ICCA, positioning Scotland at the top table globally.

In 2019/2020 VSBE is moving from a Traditional Tourism Model to a Policy Driven Model. This is intended to prioritise and formalise the pursuit of business events aligned to Scotland's credentials and ambitions, as a means to deliver Scottish Government Policy beyond the visitor economy focus of the Traditional Tourism Model.

Further information: <https://businessevents.visitscotland.com/>

9.6 Wales

Visit Wales Business Events

Located within the Welsh Government, the Visit Wales Business Events team (#MeetInWales) promotes Wales as a destination for meetings, incentives, team building, events and conferences. It provides impartial and free advice on products and venues across Wales that cover city, countryside and coastal locations in a mix of modern, historical and purpose-built facilities, supported by spectacular landscapes, incentives and accommodation options.

The Welsh Government has developed a new approach to attracting business events following a detailed scoping study into the opportunities from this sector. Clear potential has been identified for Wales to increase market share from

UK and international associations, public and third sector meetings, corporate meetings and team building events. Wales can gain competitive advantage through innovation and being distinctive with its offer, adding value in ways other destinations find difficult, especially as a compact, well connected country. A new strategic approach fully aligned with Wales' sector and academic strengths is enabling Wales to tap into hitherto untapped potential.

The overall Wales' Business Events Strategy has five key components:

1. A new and expanding team to co-ordinate and lead greater visibility in the business events market place, manage a raft of new industry initiatives, brand development and stakeholder engagement.
2. Attendance at national and international shows and events across the UK, Europe and North America.
3. A co-ordinated approach to promoting Wales as a knowledge capital and matching business events with Wales' economic sector strengths including manufacturing, life sciences, energy and technology.
4. An education programme for partners throughout the country who are looking to engage in and support the fulfilment of Wales' ambitions in capturing a greater share of the business events market.
5. Maximising Wales' reputation and pedigree as an events host following its successful hosting of global events such as the Volvo Ocean Race, UEFA Champions League Final, the NATO Summit, WOMEX and Bio Wales, one of the UK's leading life sciences conferences.

9.6.1 Key objectives and strategy for attracting business events

Visit Wales Business Events has four main strategic objectives. These are:

- To increase Wales' market share of the business events market
- To deepen the connection between business events and Wales' economic and academic sectors to promote foreign direct investment (FDI) / economic growth / knowledge capital
- To develop and promote a distinctive Wales business events brand proposition
- To prepare and educate Wales' business events product in anticipation of increased activity

Our business events messages emphasise Wales' global outlook and Wales' distinct culture and heritage. Wales has strong MICE credentials, including a wide diversity of meeting spaces throughout the country ranging from a capacity of 100 to 5,000 meeting attendees. The country also proudly boasts a wide range of incentive and "out of conference" activities taking advantage of Wales' natural landscapes and environments. Wales has a growing reputation as a major events host which underpins confidence in the destination in the business events market. Welsh industrial sector strengths – including automotive, renewable energies and financial services – underpin the nation's appeal to regional, national and international business events strategists.

Wales is committed to research, development and innovation, putting it at the forefront of developments in technology, engineering, energy, the environment and life sciences. Sectoral strengths in Wales include: Advanced Materials & Manufacturing, Creative Industries,

Energy & Environment, Financial & Professional Services, Food & Drink, Life Sciences, Tech and Tourism.

Specific examples of growing sector strengths include advanced motor manufacturing, such as the latest innovations and lessons from Aston Martin and TVR factories based in Wales, as well as ICT through, for example, the Computational Foundry in Swansea which drives research into computational and mathematical sciences, making Wales a global destination for computational scientists and industrial partners. Wales boasts specialist expertise in UAV's (Unmanned Aerial Vehicles) utilising the unrestricted air space of the West Wales coast whilst the Aerospace Wales Forum showcases Space and aeronautical development, attracting huge international interest. Film and TV production is now a major reputational strength in Wales providing a hub for workshops, editors, scriptwriters and creatives and other production skills. Wales is at the forefront of innovations in Energy – including nuclear and renewable (marine in particular) and energy recovery. Further examples include food innovation expertise; retrofit housing – a major area of interest; and prison development with a focus on education, training and resettlement.

Crucial to Wales' commitment to research, development and innovation are the country's eight universities - four of which are in the world's top 500 (QS World Rankings) – which act as knowledge hubs for ambassadors and most have conference and meeting spaces. Wales has a great story to tell of an agile and innovative nation with a truly global outlook which has a distinct Celtic culture and heritage that offers a warm Welsh welcome. Venues and hotels in Wales which range from ancient castles (there are more in Wales per square mile than anywhere in the world) to a brand

new state-of-the-art convention centre (ICC Wales) to world-famous golf resorts in spectacular locations, situated everywhere from sweeping bays to mountain tops, from vibrant city centres to luxurious country estates.

9.6.2 New initiatives being planned or put into operation

ICC Wales – Wales' first International Convention Centre - opened its doors in September 2019. It is a state-of-the-art-venue that can hold meetings from 10 to 5,000 delegates. The venue includes an auditorium for 1,500, and a 4,000 sqm pillar-free space in a venue footprint of 26,000 sqm. The opening of ICC Wales will be a “game changer” for Wales on the international business events scene, providing a bespoke, flexible conference space (see also Chapter 7)

Venue Cymru is a theatre, conference centre and arena in Llandudno. The venue has undergone a £3+ million investment into its meeting space making the space better for delegate experiences and flow.

Wales has a host of partners, products, destinations and venues across the country that can cater from 10 to 5,000 delegates, small, medium and large events, that are engaging and developing their products to look into and accommodate the business events market needs in order to support, as well as attract, new business events opportunities into Wales.

Business sectors aspire to grow signature events and attract brand-defining business events to Wales. Attracting business events supports a more sustainable tourism economy by driving more year-round, balanced mid-week to weekend, demand and will attract new markets to Wales.

Recent event wins for Wales include:

1. securing the UK Space Agency Conference to ICC Wales in September 2019 – 1,200 delegates
2. securing the Cyber UK Conference to ICC Wales
3. securing the European Museum of the Year Awards and Conference to National Museum Cardiff in 2020 – 600 delegates

Wales continues to attract global sporting and cultural events and is now looking to capitalise on these consumer events to attract and entice business events opportunities that flow from these opportunities.

9.6.3 Ambassador Wales Programme

Wales is looking to develop its own Ambassador Wales Programme, building on the work that ICC Wales has already started with its Ambassador Wales/ Llysgennad Cymru Programme.

Ambassador Wales is a leading network of passionate professionals who believe in championing Wales as a conference, event and business event destination. The aim is to encourage the leading universities of Wales to collaborate and work across boundaries and sectors to encourage relevant academics and business events into Wales.

9.6.4 Themed Years

In April 2015, the Welsh Government announced a series of three themed years, part of an unprecedented campaign to promote Wales' tourism offer under a unified approach for the first time. The first three years were confirmed as Year of Adventure 2016, Year of Legends 2017 and Year of the Sea 2018. Following the success of the first Year of Adventure, the Welsh Government announced a continuation of the approach with

2019 designated as Year of Discovery, which builds on the three themes of adventure, culture and the great outdoors.

The themed approach is designed to promote Wales' greatest strengths and focus activities, events and attractions on the strongest qualities of the Welsh offer that are relevant to consumer, business and event markets.

9.6.5 Research

Work is underway to better understand the value and volume of business events efforts into Wales. A request is out with venues and destinations across Wales to measure and monitor their business events enquiries and to be more proactive and engaged in the overall efforts and opportunities presented.

Further information: @MeetInWales; #MeetInWales; MeetinWales@gov.wales

9.7 Destination Marketing Organisations (DMOs)

Destination marketing organisations (DMOs), often trading as convention and visitor bureaux (CVBs) bring the destination to the marketplace, offering a 'one-stop-shop' enquiry point to the conference and event organiser. Reference will also be found to DMMOs, destination marketing and management organisations, to reflect a broadening of their role into one of destination development and management rather than purely marketing, a point elaborated further in Chapter 7 of this report in the section on sustainability, where it is suggested by the GDS-Index that DMO should stand for 'destination management organisation'.

Traditionally the DMO's role has been to promote a destination, highlighting all its attractions and facilities, generating and converting enquiries into confirmed business.

While they are usually established to promote an individual town or city, it is also possible to find DMOs whose role is to represent a region of a country, or to operate at a national level promoting a whole country, as illustrated earlier in this chapter by organisations such as VisitScotland Business Events.

In structure, DMOs or CVBs are usually formed and financed as partnerships between public and private sector bodies. In the UK this can include local authorities/councils, chambers of commerce, local enterprise companies/agencies, hotels, venues, and other private sector suppliers. DMOs are established as not-for-profit organisations, controlled by a management board, to fulfil a strategic marketing role and to be the 'official' voice of the destination they represent. In many cases the DMO is established at arms' length from the local authority or authorities which it represents, but in others it remains an integral part of the local authority structure.

DMOs provide a range of services, many free of charge, to event organisers and meeting planners. Such services are likely to include some or all of the following:

i) PRE-BOOKING THE EVENT

- Literature and website information
- Venue location and selection advice
- Availability checks
- Rate negotiation
- Provisional booking service
- Familiarisation/inspection visits
- Preparation of bid documents
- Assistance with bid presentations to a selection committee/board
- Assistance with civic hospitality and subvention requests

ii) PREPARING FOR THE EVENT

- Block accommodation booking service for delegates
- Co-ordination of the full range of support services including transportation, registration, translation, office support. In some cases these will be provided in conjunction with a professional conference organiser (PCO) or destination management company (DMC)
- Promotional and PR support to maximise delegate numbers and increase awareness of the event in the host destination
- Supply of delegate information
- Planning partner programmes, social programmes, and pre- and post-conference tours
- Arranging contact with local conference service companies and event organisers

iii) DURING THE EVENT

- Provision of 'Welcome Desks' for delegates at major points of entry
- Civic welcome and recognition, and possible financial or in-kind support and subvention
- PR support
- Provision of tourist information

iv) AFTER THE EVENT

- Post-event evaluation and follow-up research
- Consultancy support to the destination which will next host the conference.

Case studies 9.1 and 9.2 provide examples of the current structure and operations of two UK city destination marketing organisations: Meet Bristol and Meet Cambridge. Case study 9.3 (located at the end of the chapter) provides details the 'Greater Manchester Business Visits and Events Strategy 2019-2025' of Marketing Manchester, the destination marketing organisation for the Greater Manchester region.

CASE STUDY 9.1 Meet Bristol

Conference Bristol was developed in the mid-90s by the Bristol Hoteliers Association and the Chamber of Commerce, and became part of the new Bristol Tourism & Conference Bureau upon launch in 1999. Relunched as Meet Bristol in 2018, the service was positioned as a convention bureau for the Bristol city region, focussing on bringing in new business as well as supporting venues and hotels in the area.

Meet Bristol operates within the DMO operation of Destination Bristol, alongside its leisure 'sister' Visit Bristol. Within Destination Bristol there are the following departments/businesses:

- Visit Bristol - leisure marketing and travel trade
- Meet Bristol – MICE
- BIDs - 3 business improvement districts
- Tourist Information Centre (TIC)

The organisation is around 40% funded by Bristol City Council, with other revenue streams being membership, commercial revenue and conference commission.

Like most convention bureaux (CVBs), a lack of resource

is Meet Bristol's biggest challenge. With increased funding, it would be able to focus more on research and development with the aim of securing high-value conferences. Meet Bristol would also like to be a member of the International Congress and Convention Association (ICCA) to support such objectives but the overall cost is currently beyond its means. Greater resource would also enable Meet Bristol to partake in sales missions to expand its worldwide reach.

Meet Bristol has close relationships with its members and organisations within the city and focuses on collaboration in order to produce the best possible MICE offering for the region.

Meet Bristol has recently launched a conference ambassador programme. This aims to increase the volume and value of inbound conferences, with a focus on international associations relating to the city's economic strengths.

Meet Bristol. Web: www.meetbristol.co.uk | Twitter: @MeetBristol | LinkedIn: Meet Bristol CVB

However, it is important to note that the DMO role is changing and evolving to reflect changes in the national and international events market as well as new destination promotional and management structures. These new roles are described below by two of the UK's leading and most successful DMOs, Glasgow Convention Bureau and London & Partners.

a) Aileen Crawford - Glasgow Convention Bureau

Whether you call it Business Tourism, the Meetings Industry or Business Events, it's an interesting time for the industry, as it reaches maturity. Glasgow's tourism and conference industry turned 30 in 2019. The 1980s saw an increase in the number of UK cities creating visitor bureaux and convention bureaux services to deliver economic benefit from visitor and delegate spend (Heeley, J., 2015)(ICCA, 2015).

Now entering middle age, our industry is wondering what it wants to be when it grows up.

Business Events professionals are asking: are we tourism? are we inward investment? are we drivers of economic change, or drivers of social change?

The positive answer is that Business Events are all of those things, it's just the industry hasn't been very good at articulating the impact across those other key areas, until now. The economic benefit from delegate spend has understandably taken centre stage over the formative years, but as our industry matures, so too does its reputation in profiling academic excellence in the host city, creating knowledge exchange, research collaborations and trade and business opportunities for the local industry.

Looking to the future, the Beyond Tourism benefits of conferences, although harder to measure, are no less important. Joachim König, President of the Joint Meetings Industry Council, explains (König, J., 2017):

"Quite simply, it is the fact that the focus of our value proposition as an industry has been shifting from one based on delegate and organiser spend to the value of what these events actually achieve for organisers, participants and host communities. As simple as it sounds, this in fact has huge implications, because it places Business Events (sic) at the very centre of both the global economy and the underlying scientific, professional, academic, business and social advancements that drive it."

Joachim König, President, Joint Meetings Industry Council

This is good news for non-capital cities and university towns, looking to attract conferences to their destination, by articulating the benefits for the conference delegates and exhibitors in terms of the scientific, business and professional reasons to choose their city.

So, what does that mean for the DMO of the future? If conferences are to be more than the economic

drivers of a destination, the DMOs and convention bureaux of the future will be charged with understanding their knowledge-based economy to align that of their city with the vision and mission of their client. The attractiveness of cities to those deciding the next location of their meeting will be looking at the academic excellence in the field and local industry in the sector, as well as the vibrancy of the city as they make their decision.

This new, mature view of Business Events challenges the language used by DMOs and convention bureaux to

promote their destination and it also challenges the traditional skill set of the DMO team. Promoting logistics of the destination and transactional sales techniques are out, research skills and stakeholder engagement are in.

Interesting times indeed.

Aileen Crawford, Head of Conventions, Glasgow Convention Bureau – <https://glasgowconventionbureau.com/>

b) Tracy Halliwell - London & Partners

It's difficult to set out the work of a typical DMO in 2020, as they vary greatly across nations, regions, countries and even continents, but fundamentally wherever they are and whatever they have been doing, it's a sure bet that they have been slowly and quietly evolving their business models to stay relevant, to become more self-sufficient and to go beyond a traditional brand and destination marketing role.

Their roles will include some aspects of the following bulleted list, and

CASE STUDY 9.1 Meet Cambridge

Meet Cambridge, formerly Conference Cambridge, was established in 1998 as the official venue-finding service for spaces at the University of Cambridge and its Colleges. Born out of a need to have a single, central enquiry point, the organisation is owned by the Cambridge Colleges, two faculties of the University of Cambridge (the Faculty of Music and the Faculty of Continuing Education) and Cambridge University Press, all of which pay an annual fee which funds Meet Cambridge.

Meet Cambridge is managed by a board of five Directors under the direction of the Cambridge Colleges' Bursars' Committee. The organisation employs five full-time staff and a part-time bookkeeper: two venue-finding executives, one venue-finding and digital media executive, a Deputy Manager and a Managing Director.

In 2010 Meet Cambridge became a limited company. Hotels and other unique venues were invited to join the organisation as associate members with the purpose of being able to give clients more choice during the periods of the year when the University and College facilities were not available. Associate venue members pay a membership fee and commission to Meet Cambridge on placed business. Today the organisation has 57 member venues, all based in and around Cambridge.

In the absence of an official DMO for Cambridge, Meet Cambridge, helped largely with matched funding from VisitEngland, began to market the destination internationally and, from 2009, became recognised as the official conference and events bureau for the city. In 2012 it launched an ambassador programme offering a range of free services to support those making bids to bring conferences and events to the city. In 2018-2019, the programme assisted 17 ambassadors, 8 of whom

held their events in the same time period bringing 1,920 delegates to the city, worth approximately £2.1 million to the local economy.

Following a rebrand to Meet Cambridge in 2016, the organisation entered into a strategic partnership with VisitCambridge & Beyond and widened its range of services to include event management in partnership with a local PCO. Over the course of the last two years it has invested in its digital presence and its core processes. Now 72% of leads come via its web site and are processed via a sophisticated CRM system allowing its member venues to make offers quickly and allowing its clients access to their own online enquiry portal where they can view venue responses in real time.

Today the organisation markets the city and the facilities at its venues locally, nationally and internationally through a coordinated programme of activity including PR and digital campaigns as well as fam trips and events. Annually it attracts approximately 4,000 enquiries - in 2018-2019 the organisation processed leads worth approximately £18.9 million. Conversion sits at 25% and in the last year 67% of enquirers were new clients, 38% were repeat clients; around 40% of its clients are academics or associated staff from the University. The city ranks as a top ten destination in the UK for international association events as reported in the ICCA Country and City Rankings.

Meet Cambridge is not-for-profit and funded solely by its members. Its income funds its premises and staff costs and provides a small budget for marketing which in 2019 was significantly cut. It receives no financial support from local or national government.

www.meet-cambridge.com

the extent of their involvement will vary across mature versus emerging destinations - predominantly leisure versus meetings and events destinations (which will often have an integrated or stand-alone convention and visitor bureau (CVB) and/or major events team); and across public versus private sector organisations – or public/private sector hybrids, The roles will include some of the following:

- Advocates for tourism
- Cultural champions
- Drivers of visitor spend
- Drivers of jobs and growth through the direct and indirect impacts of the visitor economy
- Marketing to attract visitors
- Communications to build brand and reach
- Placemaking
- Facilitating connections and introductions
- Storytellers and wayfinders for visitors
- Inspirers
- Information portals

Many organisations have now also begun to redefine their purpose, joining with other public bodies to create economic development organisations whose remit covers not only tourism, but also investment, export and the attraction of students and talent, as has been done in London.

Issues increasingly being faced by DMOs are probably similar around the world:

- Less public funding available
- The need to justify return on investment (ROI) to politicians and policy makers
- More focus on the private sector and commercial opportunities
- The socio-economic impact of tourism on local communities

and businesses – the upside of job creation versus the downside of overcrowding and infrastructure pressures

- The rise of personalisation in travel experiences, creating a need for unique and individual experiences rather than packaged group travel
- The rapid evolution of digital tools - social media, analytics, and mobile apps, necessitating different skills and content creation.

Opportunities, though, are huge around the impact and potential of meetings and events to underpin economic growth; to improve knowledge dissemination; to speed the process of developing innovation economies; to create opportunities for people to meet, to network and to exchange ideas – in short, to change the world! Hence it's not enough to talk about the number of hotel rooms, the variety of meeting spaces and leisure offerings; destinations now need to talk about their intellectual capital and sectoral expertise, in the same breath.

Tracy Halliwell MBE, Director of Tourism, Conventions & Major Events, London & Partners – <http://conventionbureau.london>

9.8 Core Cities

Core Cities is a grouping of England's largest eight cities (excluding London) which was formed with the objective of helping to develop their visitor economies. The current members are Birmingham, Bristol, Leeds, Liverpool, Manchester, Newcastle-Gateshead, Nottingham and Sheffield. Representatives of the cities meet at least four times a year with meetings rotating around the member cities. Core Cities also works closely with VisitEngland and VisitBritain.

Core Cities is driven by the conviction that, despite above

average growth in their tourism market, there is further growth potential from the highest spending markets. If England's core cities are able to attract more international visitors for holidays, business and events, that growth will benefit Britain and bring jobs and prosperity, supporting economic redistribution and strengthening the global positioning of the core cities for inward investment.

9.8.1 Place Marketing

Core cities are particularly well placed to tap into all aspects of tourism and events throughout the year. And year-round tourism demonstrates better productivity because there are fewer peaks in demand for attractions, accommodation and transport.

All core cities have established place marketing organisations that promote the city as a place to live, work, invest and visit. This is an effective way to unite messages under a shared brand. However, the core cities frequently lack the scale of resources to compete effectively on a world stage for major conferences and exhibitions. They recognise that they need to find creative solutions that play to the collective strength of the collaboration of the eight cities.

9.8.2 Transport Connectivity

Excellent transport connectivity is essential for the core cities to grow international tourism and business events. Delivering 21st century connectivity means cities can bid competitively for international conferences and exhibitions, welcome more international tourists and enable them to explore Britain more widely. All of the core cities are investing in their transport connectivity – road, rail and air. However, Core Cities believes that transport plans rarely look at the needs of visitors and their travel patterns. It wants to ensure that the role tourism and events can play

in making the case for transport infrastructure investment is fully understood and articulated. It is also campaigning for improved rail infrastructure for transporting more visitors out of London and into the core cities – this includes improved frequency of services, enhanced rolling stock, and better pricing, ticketing and information.

9.8.3 Collaborative Projects

The eight cities share data on their visitor economies, both leisure tourism and business events. They also collaborate on joint projects, for example the development of a new accommodation booking system.

The cities have also applied jointly for funding, such as that offered by the Discover England Fund, to support a 'smart convention bureaux' project.

For further information on Core Cities visit: www.corecities.com

9.9 Destination Marketing Organisation Funding and Visitor Taxation

Against a backdrop of reduced central government funding to local authorities and a squeeze in recent years on budgets available to destination marketing and management organisations, many local authorities are assessing the pros and cons of introducing some form of visitor taxation, as evidenced by Edinburgh's proposal to levy a bed tax while, at the same time, reducing markedly its allocated budget to Marketing Edinburgh. So what are the benefits and disadvantages of a system of visitor taxation?

In an article entitled 'Bed Taxes: comforting funding stream or destination nightmare?' (Cooke, 2019), Philip Cooke, MD of the UK-based Destination Marketing Group (who has studied, worked and travelled extensively in the USA), describes the operations and

objectives of bed taxes. He writes:

'Many countries and cities are able to devote large sums of money to promoting and developing their tourism industries via a system that taxes the visitor, not the host. These competing regions, most notably in the USA and Canada, use a 'Transient Visitor Tax' system to raise funds that can only be used for the promotion and development of their tourism industries, and they do this by means of a locally-determined tax that is placed on related expenditure. Hotel accommodation is just one of several related transient visitor taxes that are employed in the USA and which include a Food and Beverage Tax added to restaurant bills and a Convention Centre Development Tax added to the cost of hiring a conference centre or similar venue.'

Transient visitor taxes are 'hypothecated' taxes which means that the income they generate can only be used, by law, for specific purposes – in this case, to attract more visitors, to invest in business tourism facilities and resolve environmental problems created by visitors. Transient visitor taxes are also self-regulating and can help prevent the modern-day scourge of 'overtourism'. For instance, if a US city gets greedy and taxes its incoming transient visitors at too high a level, then planners and buyers will simply take their footloose business to a lower-taxed destination.'

Many UK local authorities like the idea of transient visitor taxation and are attracted by the much-needed funds it can generate, especially as the tax isn't paid by local residents or local businesses. For instance, Oxford City Council has been arguing to be given the power to develop a local tourism tax, linking it to Brexit, and saying that "...the devolution of power to local authorities to impose tourist taxes may be well worth fighting for, at a time of post-Brexit uncertainty and public spending cuts."

Other UK authorities that are considering the introduction of a tourist/visitor/bed tax include Camden, Westminster, Bath, Birmingham, Brighton, Cornwall and Edinburgh, which is exploring the introduction of a 'flat rate' levy of either 2% or £2 per night, per hotel room or Airbnb-style short-term let and calling for a 'national', rather than 'local', debate.

But the UK has a very centralised taxation system, with income and expenditures defined and controlled by HM Treasury, an organisation that does not favour any form of locally-determined taxation. So only time will tell whether these initiatives will mature.

A recent poll in Edinburgh showed 85% of respondents, including a majority of the city's businesses and accommodation providers, in favour of introducing a transient visitor levy (TVL), or tourist tax and the council estimated the proposed scheme could raise between £11.6m and £14.6m per year for the city, although some business groups have warned it could have an impact on other revenue from tourism.

But not everyone is behind Edinburgh's proposed transient visitor tax and the leaders of the city's hotel and hospitality sector have voiced their opposition to any form of tourist tax, claiming it would damage the city's tourism and hospitality sector.

Writing in 'The Scotsman' newspaper, John Donnelly, Marketing Edinburgh's chief executive, said: "More people coming to the city is brilliant news for our economy – but it puts increased pressure on our ability to service them. So, how can we secure sustainable investment to maintain our position as one of the world's best destinations, without compromising the city experience for those who live here? A tourist tax is a proven model."

The article gives details of the management board structures and staff resources of a number of US convention and visitor bureaux. It references the European Commission's website (www.ec.europa.eu) as being a good source of information about the extensive range of 'Occupancy' or 'Transient Visitor' taxes that are currently being levied across the EU. It also mentions that nearly 20 EU member states, including France, Germany, Spain and Switzerland, currently apply country-specific forms of the transient visitor tax at city, municipality or provincial levels, with comparatively low rates charged in the eastern EU countries and much higher rates in Western and South-Eastern Europe.

The UK's Tourism Alliance (www.tourismalliance.com) published (May 2018) a 'Briefing on Bed Tax' and some of the key points from this briefing paper are set out below:

1. Tourists Don't Pay Their Way

One of the main arguments for the introduction of tourism taxes is the perception that visitors to a destination do not pay their way. The view is that visitors place a burden on public services and amenities paid for by residents without contributing to the maintenance of those services and facilities. The argument runs that, by imposing a tourism tax, usually in the form of a bed tax, visitors can pay the additional costs of maintaining the public realm rather than imposing these costs on local residents. However, this is an overly simplistic way of considering both the taxation of visitors and the impact of visitors on destinations.

First, it is erroneous to think that visitors do not pay their 'fair share' of taxes. The World Economic Forum, in its 2015 international tourism competitiveness survey, ranks the UK as 140th out of 141 countries in terms of price competitiveness. This

ranking is primarily due to the level of tax that visitors pay. Whereas most European countries operate a reduced VAT rate on the main components of visitor expenditure (accommodation, restaurant meals and attractions), the UK charges full rate VAT on all three. In addition, the UK has one of the highest rates of Fuel Duty in the world (which impacts on domestic visitors) and the highest rate of Air Passenger Duty in the world (which impacts on inbound visitors).

The Tourism Alliance estimates that, in just VAT payments alone, visitors contribute around £21.5 billion to the Exchequer each year. The problem, therefore, is not whether visitors pay their way, but that the tax visitors pay is collected centrally by Government and is not recirculated to the destinations where tourism activity takes place.

2. The Problems with Bed Taxes

The usual means proposed for introducing a Tourism Tax is through accommodation charges i.e. a bed tax of tourism accommodation. However, there are two significant problems with this approach.

- a. *Fairness - the 2017 UK Tourism Survey (UKTS) and Day Visitor Surveys show that there were a total of 1.9 billion domestic tourism trips undertaken in the UK. Of these, 1.8 million (94.7%) were day trips where the visitor did not stay overnight. Introducing a bed tax would, therefore, be requiring just 5.3% of visitors to a destination to pay for the costs associated with visitors.*

If that was not inequitable enough, it is doubtful that councils would be able to gain the tax from this 5.3% of visitors. One problem is that a large percentage of visitors to a destination either stay with a friend or family member, or stay in their own accommodation.

UKTS figures indicate that, of the 124 million domestic overnight trips taken in the UK during 2016, 36% were by people who stayed with friends, relatives or in their own property. This leaves just 76.5 million of 1.9 billion trips where the visitor stayed in commercial accommodation.

However, there is still the problem that, as there is no statutory registration scheme for accommodation providers, there is no mechanism for councils to develop a comprehensive list of accommodation providers in their area. There has traditionally been a problem in being able to identify self-catering accommodation which has been greatly exacerbated with the recent growth of Sharing Economy businesses such as AirBnB where residents are able to have visitors to stay in their private home. There is also the issue of whether a bed tax could be applied to visitors using camping grounds or caravan parks.

The easiest way for councils to avoid the problems of identification and application would be to simply apply a bed tax to serviced accommodation. However, service accommodation (e.g. hotels, motels, guesthouses, inns and B&Bs) is only used in 41% of the overnight trips taken and only 28% of all the nights that domestic visitors spend away from home.

This means that a bed tax levied on serviced accommodation would only be targeting 2.6% of the people who visit a destination each year. As such, imposing a bed tax is a highly inequitable way of gaining funds from visitors to a destination and deters the very people who contribute the most in terms of expenditure in the local economy.

- b. *Disincentivisation* – it is well known that many day visitors tend to spend relatively little in the destination that they visit. This is highlighted by the 2017 Day Visitor Survey which shows that a day visitor spends just £34.67 per visit. However, a domestic tourist spends £193 per visit, with accommodation providers and restaurants at the destination being the main recipients of this additional expenditure.

Therefore, increasing the cost of staying in a destination through the imposition of a Tourism Tax incentivises visitors to become day visitors, who use the same services and facilities but contribute much less to the local economy. A far better strategy would be to encourage a higher percentage of day visitors to become higher-value overnight visitors.

3. Could a Tourism Tax Work?

It is often noted that other countries (and states within countries) operate tourism tax regimes that do not harm their local tourism industry and, in some cases, help boost tourism by providing funding for tourism development and marketing programmes.

However, there are an equal number of examples where tourism taxes have

been detrimental to destinations. One famous example is New York where a combined Tourism and Sales Tax rate of 21.25% resulted in the convention industry halving in size within five years and culminated in a boycott of the city by conference organising companies.

There are two main pre-conditions for a successful tourism tax in the UK:

- c. **Fairness** – as shown above, a tourism tax has to be applied in a way that is fair to the visitor and tourism businesses, and produces incentives and outcomes that are supportive of both tourism development and the growth of the local economy. This means that, instead of imposing the tax on one small set of visitors and tourism businesses, the tax should be spread across all visitors and businesses.
- d. **Hypothecation** – the second pre-condition for a successful tourism tax is that funds collected by the tax are hypothecated to tourism development and promotion. There are many examples of destinations where tourism businesses have agreed to a tourism tax as a means for funding tourism development. In these situations, the funding is usually managed jointly

by the industry and the local authority and used to fund an agreed strategy for tourism development.

A mechanism for local authorities to gain additional tourism-related funding that fulfills these two criteria already exists: such as Business Improvement Districts (BIDs) or Tourism Business Improvement Districts (T-BIDs). Tourism-related BIDs collect additional taxes from tourism-related businesses in a way that is proportionate to the benefit that the local business derives from tourists, regardless of whether these visitors are day visitors or staying overnight. As such, the tax is fair to businesses and visitors alike.

Second, the collection of the tax is based on a plan that is agreed between the tourism industry and the council so that the funds generated are focused on agreed priorities that will stimulate tourism growth and benefit the local economy.

It is the view of the Tourism Alliance that, if there is a genuine need for the introduction of a tourism tax to fund the maintenance and improvement of the public realm, the appropriate mechanism to achieve this (BIDs and T-BIDs) already exists and there is no need to introduce new legislation.

CASE STUDY 9.3 Greater Manchester Business Visits and Events Strategy 2019-2025



The Manchester Convention Bureau was established in 1996 by Marketing Manchester to facilitate and attract conferences to the Greater Manchester region (covering the 10 local authorities of Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Stockport, Thameside, Trafford and Wigan). The

Bureau has sought

to develop a series of strategic partnerships with key stakeholders including VisitBritain, Manchester Central, the universities and the Manchester Hoteliers Association to increase the number of conferences hosted in Greater Manchester and to maximise their economic benefit.

Conferences and business events hosted within Greater Manchester during 2017 were worth £862 million to the economy. A further £430 million is projected to be generated from delegates who will make a return visit for leisure purposes, many bringing partners and family with them. The sector supports over 35,000 jobs, with additional jobs being supported by those extending, or returning, for leisure purposes.

Conference activity within Greater Manchester is generally focused around Manchester City Centre, particularly Petersfield and Manchester Central, as well as The Quays.

Manchester's Convention Bureau identifies, bids for and successfully secures major conferences to Greater Manchester; works with professional conference organisers and venue contacts to secure and facilitate incoming business; and operates a venue sourcing service and a delegate accommodation service.

The Bureau sits within Marketing Manchester and is responsible for developing and supporting the destination's conference and events activity conducted under the 'Great Minds Meet in Manchester' brand.

Marketing Manchester is responsible for promoting Greater Manchester as a place to visit, invest, meet and

study and is the Destination Management Organisation for Greater Manchester. Marketing Manchester is part of the Growth Company (for more information visit: <https://www.growthco.uk/>).

In 2017-18 the Manchester Convention Bureau:

- submitted 85 bids for major conferences
- converted 30 bids with an economic impact of £26 million into confirmed business
- booked £2.2 million of business through its Venue Location and Accommodation Booking Services
- placed 12,000 accommodation bookings
- increased the number of bids submitted by 16.5% compared to 2007
- increased the number of bids converted by 50% over the same period
- achieved a 25% increase in economic impact

In 2019 Marketing Manchester published its 'Greater Manchester Business Visits and Events Strategy 2019-2025'. To prepare the framework for this Strategy, Marketing Manchester held two workshops involving 75 business representatives from across the region. Through this process of engagement and consultation, the ambition and business priorities of the sector were identified and are reflected in the Strategy document. VisitBritain's Head of Business Events was also consulted to ensure that Manchester can take full advantage of national opportunities. Insights of best global practice were sought from the Editor-in-Chief of 'Conference News' magazine. A further consultation workshop with industry partners was held in November 2018 to gain feedback on the draft Strategy before publication of the final version.

Key elements of the Strategy are set out below. The aim of the document is to outline the robust approach needed for Greater Manchester to realise its Vision, which is that:

By 2025, Greater Manchester will be a global destination of choice for conferences aligned to Greater Manchester's priority sectors; offering world class support to conference organisers and a memorable experience for delegates.

Our ambition is to grow business tourism earnings in Greater Manchester from £862 million in 2017 by 40% or more by 2025, generating an additional £345 million to the regional economy.

The strategy document describes a number of Focus areas which will be vital in achieving its Vision. These Focus

Continued...

areas (the Strategy document contains more background information and detail than the summary in this report) are:

Focus 1: Attracting More Conferences to Greater Manchester

Priorities for Action:

- Increased understanding of buyer decision-making – capitalising on Manchester’s existing strengths with a priority on ease of access, world-leading sector strengths and venue capacity
- Consistent business tourism messages to existing and emerging markets
- Investigate opportunities in China and India, as well as an increased presence in North America
- ‘Piggy back’ on Group and Travel Trade activity already taking place in these markets
- Develop a robust incentive offer to target part-conference / part-incentive groups
- Increase promotion to delegates of opportunities to extend their stay
- Re-focus on attracting national business particularly from the corporate market as this is shorter lead time and quicker wins
- Increase on-territory activity with VisitBritain and local partners
- Gain sufficient resources required to deliver the agreed marketing activity
- Provide reassurance of Manchester as a safe destination

By 2025 We Will Have:

1. Delivered sustained marketing and communications activity to promote awareness of Manchester as a major business tourism destination
2. Developed a consistent business tourism message which will provide a common narrative when the Convention Bureau and partners are promoting Greater Manchester
3. Worked closely with the region’s bookable product and developed robust promotion detailing reasons for delegates to extend their stay
4. Increased national association and corporate conference business coming into Greater Manchester.

Focus 2: Collaboration
Priorities for Action

- Increased partnership with stakeholders and strategic partners to demonstrate to conference

organisers a ‘Team Manchester’ approach

- Engagement with Transport for Greater Manchester to develop a strong local transport offer for delegates
- A clear recruitment and recognition programme for Conference Ambassadors
- Early engagement with new venues and hotels to gain their participation with the offer of incentives and to ensure timely sign-up in order to include them in business tourism activity
- Maximise opportunities afforded by DCMS, other Government Departments and VisitBritain
- Seek greater Ministerial advocacy and support
- Develop airline partnerships

By 2025 We Will Have:

1. A clear recruitment and recognition programme for Greater Manchester’s Conference Ambassadors
2. Worked in partnership with Transport for Greater Manchester to create a delegate transport pass to encourage visitors to travel further around the region
3. A robust ‘Team Manchester’ approach from bid inception to convention delivery

Focus 3: Delivering a World Class Delegate Welcome
Priorities for Action

- Develop a clear and compelling Delegate Welcome programme with adequate funding to promote and deliver it
- Consistent business tourism messages in the market to increase the profile of a delegate welcome within the region
- Increased collaboration of key stakeholders
- A memorable offer that creates a ‘buzz’ for organisers and delegates
- Engagement of the wider business community around larger conferences

By 2025 We Will Have:

1. Developed an International Delegate Airport Arrivals programme with clear messages on the region’s offer for business tourism
2. Developed a delegate transport pass in partnership with TFGM
3. Developed a clear and compelling Delegate Welcome programme with the collaboration and buy-in from stakeholders

Continued...***Focus 4: Developing our Product***
Priorities for Action

- Connecting organisers with Manchester's world-leading academics and businesses to assist with keynote speaker opportunities
- Strategic promotion of green credentials, corporate social responsibility (CSR) and sustainability messages about Manchester and its venues
- Developing a programme of 'home grown' events
- Exploration of a digital marketing piece for defined conference sectors i.e. corporate, association, incentive
- Exploration around conference destination message app for delegates or Bluetooth beacon messaging
- Set out a programme of intelligence gathering, monitoring and impact analysis

By 2025 We Will Have:

1. A robust process in place to connect organisers to Manchester's world-leading academics and business community
2. Fully capitalised on the city's aspirations to be a 'Carbon Free City'
3. Developed two 'home grown' events, initially scoping the advanced manufacturing and digital sectors

The Strategy also contains sections on:

- the importance of business tourism
- Greater Manchester trends
- a SWOT analysis
- budget requirements for the delivery of the Strategy.

To view the full strategy visit: <http://www.marketingmanchester.com/resources/>

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CHAPTER 10

BUSINESS VISITS & EVENTS PARTNERSHIP / EVENTS INDUSTRY BOARD

10.1 Introduction

In the UK there are two overarching bodies which seek to represent and promote the interests of the events sector to the widest possible communities. These bodies are the Business Visits & Events Partnership (BVEP) and the Events Industry Board (EIB). This chapter describes the objectives, activities and memberships of these two organisations. The chapter also gives details of the All-Party Parliamentary Group for Events (APPG).

10.2 Business Visits & Events Partnership

The Business Visits & Events Partnership (BVEP) is an umbrella organisation representing leading trade and professional organisations, government departments/agencies and other significant influencers in the business visits and events sector. BVEP and its partners and supporting organisations have a shared interest in the economic benefit and growth of conferences, meetings, exhibitions, trade fairs, incentive travel, corporate hospitality, ceremonies, as well as other business, sporting, cultural and festival events, and including a range of additional services provided to travellers and attendees at events.

10.2.1 Background

The BVEP was formed in 1999 as part of the Labour Party's Tourism Strategy to establish a standing group to represent the business tourism sector. Chris Smith was Secretary of State at Department of National Heritage and Janet Anderson Minister of Tourism.

Virginia Bottomley had started the work in preparation for the 1997 Conservative Party manifesto by asking the British Tourist Authority (BTA) to submit a report on the sector with recommendations.

The original group convened under the auspices of the BTA as the Business Tourism Partnership. The name was changed to the Business Visits and Events Partnership in March 2008 to relate to changes in the remit of the sector and in the role of VisitBritain (formerly British Tourist Authority). The Partnership became an industry-led body and independent of VisitBritain in 2011.

10.2.2 BVEP Role

In October 2019 the members of the Partnership adopted new Terms of Reference and key points from these are set out below:

Vision

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

Mission

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

Objectives

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, to 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.

10.2.3 BVEP Membership

Full membership of the BVEP is open to all organisations or representative bodies in the private, public or voluntary sectors whose primary activities are in the field of Events in the United Kingdom. Membership also applies to international organisations with divisions or arrangements which represent the interests of their members in the United Kingdom.

The BVEP Partners at the end of 2019 were:

- Association of British Professional Conference Organisers (ABPCO) – www.abpc.org
- Association for Events Management Education (AEME) – www.aeme.org
- Business Travel Association (BTA) – www.thebta.org.uk
- Core Cities – www.corecities.com
- Events Industry Alliance (EIA), representing three bodies: Association of Event Organisers (AEO) – www.aeo.org.uk, Association of Event Venues (AEV) – www.aev.org.uk, and the Event Supplier and Services Association (ESSA) – www.essa.uk.com
- Events Industry Forum (EIF) – www.eventsindustryforum.co.uk
- Event Marketing Association (EMA) – www.ema-uk.com//
- Event and Visual Communication Association (EVCOM) – www.evcom.org.uk
- HBAA – www.hbaa.org.uk
- International Congress and Convention Association (ICCA) – www.iccaworld.org
- London & Partners – www.conventionbureau.london
- Meet in Ireland – www.meetireland.com
- National Outdoor Events Association (NOEA) – www.noea.org.uk
- Professional Convention Management Association (PCMA) – www.pcma.org
- Production Services Association (PSA) – www.psa.org.uk
- Tourism Northern Ireland – www.tourismni.com
- Visit Wales – www.visitwales.com/businessevents
- VisitBritain - www.visitbritain.org and www.eventsaregreat.com

www.visitbritain.org

- VisitEngland – www.meetengland.com
- VisitScotland – www.businessevents.visitscotland.com

Supporting government departments and agencies include:

- Department for Digital, Culture, Media and Sport (DCMS) - <https://www.gov.uk/government/organisations/department-for-digital-culture-media-sport>
- Department for International Trade (DIT) - <https://www.gov.uk/government/organisations/department-for-international-trade>

Access to full BVEP information is via the web site: www.businessvisitsandeventspartnership.com



Department for Culture Media & Sport

10.3 Events Industry Board

In March 2015 the government published its first Business Visits and Events Strategy. One of the key commitments within this was to create an Events Industry Board (EIB) to work with government on fulfilling the objectives within the strategy. The Events Industry Board is an industry-led board composed of individuals and representative organisations from the Events Industry.

The Board is an advisory body which provides Ministers and Officials with guidance and feedback on how Britain may become a more

competitive environment in order to attract, grow and create international events.

In so doing, it will reinforce and assist the government's objective of improving the UK's world ranking for the staging of international association meetings to become the leading European country for business events, conferences and congresses by 2025.

This will have the effect of staging in Britain a greater number of high quality international events which will deliver UK growth and prosperity through:

- Direct economic impact generated by event and visitor spend
- Attracting overseas key industry decision-makers to the UK, increasing opportunities for exports and investment for UK businesses
- Attracting leading academics and innovators
- Increasing year-round productivity within the UK tourism sector
- Enhancing regional prosperity and sense of place.

The Events Industry Board focuses on:

- Implementing the UK Government's 'International Business Events Action Plan (2019-2025)' (see Chapter 4 of this report or visit: <https://www.gov.uk/government/publications/international-business-events-action-plan>)
- Supporting government in developing, implementing and evaluating policies designed to grow the business events industry as set out in its action plan
- Assisting the government in promoting the business events industry across the UK and to international buyers and

audiences

- Acting as a sounding board and point of dialogue between Ministers and the industry
- Communicating the views of the industry to government and offering constructive challenge.

The Board has so far established two working groups to look at Talent and Connectivity/Infrastructure.

Minutes of EIB meetings are freely accessible via the Business Visits and Events Partnership website: www.businessvisitsandeventspartnership.com



For further information, visit: www.gov.uk/groups/events-industry-board

10.4 All-Party Parliamentary Group for Events

Founded in 2012, the All-Party Parliamentary Group for Events (APPG) is a cross party group made up of members from both Houses of Parliament, and acts as the industry's voice in Westminster. The APPG has been credited with the events industry establishing far stronger links with both Parliament and Government.

<https://publications.parliament.uk/pa/cm/cmallparty/190102/events-industry.htm>

For further information please email: appg@daviestanner.com

Appendix

Research and Market Intelligence

Locating appropriate research and market intelligence on the events industry can sometimes be a challenge, although there is a steadily increasing fund of useful information available. Many sources of events market intelligence have been used in the compilation of this report and are detailed in the individual report chapters. This Appendix is intended as a pointer to some of the most useful sources.

BVEP Research and Resources Directory

A good starting point can be BVEP's Research and Resources Directory (www.businessvisitsandeventspartnership.com/research-and-publications/research-directory). This is a searchable database of industry and academic research for the events sector. It lists reports, white papers, expert articles, industry guides and related materials. It also includes other resources on events, especially books. New items are continually being added to the Directory. While the main focus is the inclusion of items that will be of interest and benefit to UK events businesses and students/lecturers involved with university and college

events management and similar courses, the Directory also has a global relevance. As at December 2019 there were over 300 discrete items listed in the Directory – each item includes details of the title, author, publisher, date published, a short description of key contents, and information on how to access.

Other Useful Sources

Other useful sources of research and market data include:

Joint Meetings Industry Council – <https://www.themeetingsindustry.org>

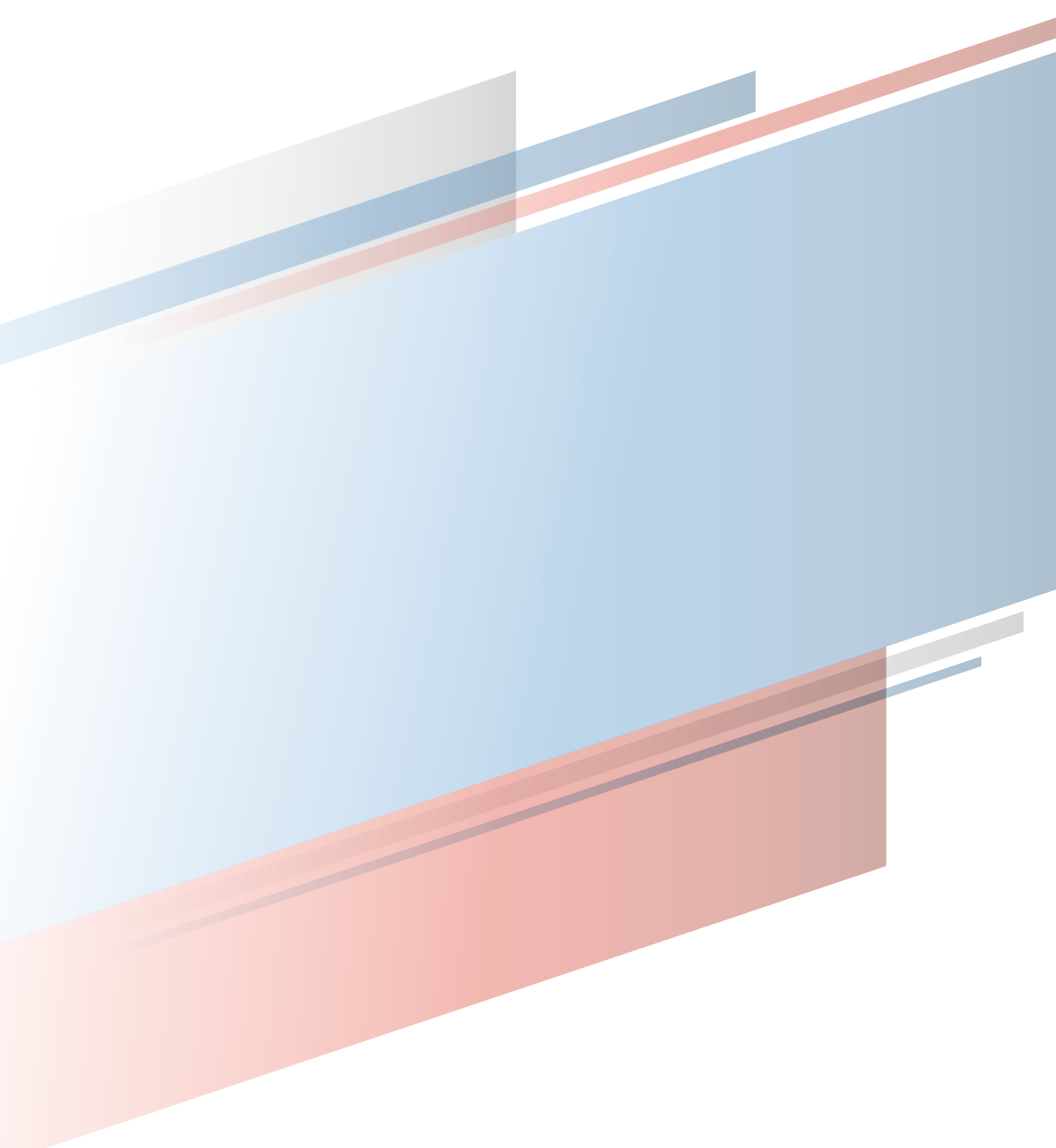
UFI The Global Association of the Exhibition Industry – <https://www.ufi.org>

Incentive Research Foundation – www.theirf.org

eventIMFACTS – www.eventimpacts.com/research

UK Music - <https://www.ukmusic.org>

VisitBritain - <https://www.visitbritain.org/business-events-research-0>



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