UKEVENTS

UK Events Report

October 2024

Contents

Foreword

Foreword by Chris Skeith OBE, Chair, UKEVENTS

As Chair of UKEVENTS, it is my pleasure to introduce the UK Events Report 2024, a comprehensive reflection on the remarkable progress, resilience, and future potential of our industry.

The past few years have tested the events sector in unprecedented ways, yet what stands out most is the collective strength, adaptability, and innovation that has emerged. Our industry, which today contributes £61.653 billion annually to the UK economy, is not only on an upwards trajectory, but is also redefining itself in a rapidly changing world.

This report delves into the different facets of the UK events industry, from corporate conferences and exhibitions to public festivals and charity fundraisers. It provides insights into how our sector continues to be a vital economic driver, supporting a wide range of industries and creating countless opportunities for employment, innovation, and cultural exchange. The events industry is, without a doubt, integral to the fabric of our society, nurturing connections, driving business, and enhancing the UK's global standing.

The last report was pre the COVID-19 pandemic, and events now play an even more crucial and efficient role to connect industries, communities and individuals, particularly as employment dynamics and the rise of hybrid and remote work mean less face-to-face time in the workplace. Yet, the challenges have also brought opportunities. As we adapt to new technologies and embrace sustainable practices, we are not only meeting the demands of today but are also setting the stage for a future that is more resilient, inclusive, and environmentally conscious.

Sustainability, in particular, has moved to the forefront of our industry's agenda. The pursuit of carbon neutrality and the integration of sustainable practices into every aspect of event planning and execution are no longer just ideals—they are imperatives. The UK events sector is leading by example, showcasing how our industry can be a force for positive change in addressing the global climate crisis, and efficiently bringing communities together and driving trade and local economic impact.

As we look to the future, the concept of legacy—ensuring that events leave a lasting positive impact on communities and economies—will become increasingly important. This report highlights the growing recognition of event legacy as a critical measure of success, beyond immediate economic returns. Our industry's focus on people, technology, sustainability, legacy, and advocacy will be crucial in shaping a vibrant and sustainable future.

I would like to express my gratitude to John Gallery of Great Potential Consultancy, and to Paul Cook, who have compiled this vital report, as well as UKEVENTS Vice Chair, Davies Tanner's Martin Fullard for his support. And, of course, to all who have contributed to this report and to the ongoing success of our industry. Your dedication, creativity, and resilience are what make the UK events sector truly world-class. As we move forward, let us continue to embrace change, innovate, and work together to ensure that the UK remains at the forefront of the global events landscape.

Chris Skeith OBE

Chair, UKEVENTS

Executive summary

The UK events industry is a significant economic contributor, with an estimated annual value of £61.653 billion. This sector encompasses a wide variety of events, each playing a crucial role in the UK's economy, culture, and society. As the industry emerges from the challenges posed by the COVID-19 pandemic, it demonstrates resilience and growth, reaffirming its importance within the broader economic landscape.

The composition of the UK events industry

The UK events industry is a multifaceted sector, comprising various event types, key sectors, and support services. The industry can be broadly classified into three main types of events: corporate, public, and charity events. Corporate events, such as conferences, trade shows, and product launches, are essential for developing business growth and networking opportunities. Public events, including music festivals, sporting events, and cultural festivals, attract large audiences and significantly impact both the economy and society. Charity events, such as fundraisers and galas, blend philanthropy with entertainment, raising awareness and funds for various causes.

Key sectors within the industry support these events, ranging from event planning and management to catering and hospitality. Venues, audio-visual services, entertainment, and event technology are integral to the successful execution of events. Additional sectors such as decor, logistics, security, marketing, and travel also play vital roles. The UK Events Industry is supported by associations and regulatory bodies that ensure compliance with health and safety standards and advocate for the industry's interests.

The economic impact of the UK events industry is substantial, with business events contributing £16.3 billion, exhibitions and trade fairs adding £10.9 billion, and leisure and outdoor events generating £18.3 billion. This economic footprint highlights the industry's significance as a driver of innovation, experiences, and marketing, serving both business and consumer audiences.

The role and impact of events in the UK

Events in the UK are pivotal to the nation's economy, culture, and social fabric. They not only attract investment and boost visitor spending but also enhance international engagement and facilitate knowledge transfer. The industry has undergone significant changes post-pandemic, particularly in employment dynamics. The live events sector saw a 10% decrease in employment, with a shift towards freelance roles. Exhibitions experienced a similar decline in direct jobs, and salaries, after an initial rise due to recruitment demands, have now stabilised.

Sustainability has become a key focus within the industry, with professionals actively pursuing environmentally sustainable practices. The industry's recovery and growth post-pandemic are evident, with spending on conferences and meetings reaching £16.3 billion in 2022, and projections to rise to £25 billion by 2026. Sporting events, exhibitions, trade shows, music events, and outdoor events are all contributing to this recovery, highlighting the sector's resilience and its role in supporting the economy and society.

The global events landscape

The global events landscape is increasingly competitive, with cities and countries vying for dominance. The UK ranks among the top countries for hosting international meetings, although it faces competition from other leading nations like the USA, Italy, and Spain. The UK's position in global rankings, such as the World Economic Forum's Travel & Tourism Development Index, has seen a slight decline, indicating the need for continued efforts to maintain its competitive edge.

Global trends in the events industry, such as the rise of incentive travel, increased spending on meetings, and the growing focus on sustainability, are shaping the future of events. The UK, as part of the global marketplace, must adapt to these trends to remain a key player in the industry.

Future challenges and opportunities

The UK events industry faces both challenges and opportunities as it continues to recover and grow post-pandemic. The COVID-19 pandemic significantly impacted live events, but the industry has shown resilience in its recovery. The focus now shifts to embracing new technologies, sustainability, and legacy impacts to drive future growth.

People, technology, sustainability, legacy, and advocacy are identified as key areas of opportunity. The industry is addressing staff shortages exacerbated by Brexit and the pandemic by adopting innovative hiring practices and focusing on attracting young, diverse, and creative talent. The shift towards remote and hybrid work has also changed employee expectations, with many professionals now seeking flexible working arrangements.

The integration of technology, particularly AI, presents opportunities for increased productivity and personalised event experiences. However, balancing AI with human creativity remains crucial to maintaining effective and engaging events. The industry's commitment to sustainability is evident, with many professionals actively pursuing sustainable practices. Achieving carbon neutrality and enhancing sustainability reporting are top priorities, particularly for international events with significant travel components.

The concept of event legacy, which refers to the long-term benefits that events bring to communities and economies, is gaining increasing recognition. Measuring and nurturing event legacy is essential for ensuring that events contribute positively to society beyond their immediate economic impact.

Advocacy also plays a crucial role in shaping the future of the UK events industry. Effective advocacy can lead to government support, strategic engagement, and broader recognition of the industry's economic and social contributions. The catalytic economic multiplier effect of events, which supports related sectors such as transport, hospitality, and retail, further underscores the industry's importance.

The UK events industry is a powerful economic driver and cultural force, contributing approximately £62 billion annually to the economy. As the industry continues to recover from the impacts of the COVID-19 pandemic, it is poised for growth, driven by new opportunities in technology, sustainability, and legacy impacts. The industry's ability to adapt to changing conditions and embrace innovation will be crucial in maintaining its significant role within the UK's economy and society. As the global events landscape evolves, the UK must continue to leverage its strengths, address its challenges, and capitalise on emerging opportunities to remain a leading player in the international events industry.

This report was compiled by John Gallery and Paul Cook of Great Potential Consultancy, with support from Martin Fullard from Davies Tanner and UK Events Vice Chair.

First Direct Arena, Leeds

1. The make-up of the UK events industry

The UK events industry is a diverse and multifaceted sector that encompasses a wide range of activities, services, and businesses. It includes everything from corporate meetings and conferences to music festivals and weddings. Below is a broad overview of the makeup of the UK events industry:

1.1. Event Types

Corporate Events: Conferences, seminars, product launches, trade shows, exhibitions, and business meetings.

Public Events: Consumer exhibitions, music festivals, concerts, fairs, carnivals, sporting events, and cultural festivals.

Charity Events: Fundraisers, galas, charity runs, and auctions.

1.2. Key Sectors

Event Planning and Management: Companies that specialize in organizing and managing various types of events, from conceptualization to execution.

Venues: Conference centres, hotels, exhibition halls, arenas, outdoor spaces, and unique venues like historic buildings or museums.

Catering and Hospitality: Food and beverage providers, catering companies, and hospitality staff.

Audio-Visual Services: Providers of sound, lighting, video, and staging equipment.

Entertainment: Performers, DJs, bands, keynote speakers, and other forms of entertainment.

Event Technology: Companies providing event management software, ticketing platforms, virtual event solutions, and other tech services.

Decor and Design: Firms specializing in event decor, floral arrangements, furniture rentals, and theming.

Logistics and Transportation: Services for transporting equipment, guests, and staff, including specialized logistics for large events.

Security: Security personnel, crowd management, and health and safety services.

Marketing and PR: Agencies that handle event promotion, public relations, and attendee engagement.

Support Services: Event Staffing, temporary staffing agencies providing event staff such as ushers, waiting staff, registration staff, and coordinators.

Photography and Videography: Professional photographers and videographers capturing event moments.

Printing and Signage: Providers of printed materials, banners, signs, and other promotional items.

Travel and Accommodation: Travel agencies, hotel booking services, and transportation providers for attendees.

1.3. Associations and Regulatory Bodies

UKEVENTS is the umbrella organisation (responsible for this report) that includes 22 partner organisations including the national tourism bodies that provide resources, networking, and advocacy for the industry.[1]

Regulatory Bodies: Entities that oversee health and safety regulations, licensing, and other legal requirements for events.

1.4. Economic Impact

The events industry is a significant contributor to the UK's economy, generating billions of pounds in revenue and providing numerous jobs across various sectors. It plays a crucial role in tourism, commerce, and cultural exchange that **currently contributes £61.653bn to the UK economy.**

UKEVENTS

Value of the UK events industry: £61.6 billion

Meetings & Conferences
£16.3bn

Incentive Travel
£2.4bn

Exhibitions & Trade Fairs
£10.9bn

Outdoor, Music, Festival & Sport events
£28.053bn

Business Travel Meetings
£4bn

Figures as of 2023 | UKEVENTS

[1] See Appendix Two – UKEVENTS Partnership

More detail of the value of each sector is shown on the chart below.

Sector	Value
Business Events:	
Conferences and Meetings	£16,3bn
Exhibitions & Trade Fairs	£10,9bn
Business Travel Meetings	£4,0bn
Incentive Travel	£2,4bn
Sub Total	**£33,6bn**
Leisure/Outdoor Events:	
Arts & culture	£5,6bn
Fairs and Shows	£6bn
Music Events	£6,6bn
Sporting Events	£9,753bn*
Air Displays	£100m
Sub Total:	**£28,053bn**
Total	**£61,653bn**

**This varies from year to year and the above is based on 2019 published figure updated with 2023 known additions including Birmingham Commonwealth Games – see 2.2.2.*

1.5. Events Reach

The above individual segments at 1.2. make up the event 'industry' and there is key value and volume data, characteristics, practices and trends that affect the growth of the industry. It is an extremely dynamic arena that provides services and solutions in multiple ways for almost every other sector in one form or other. Events can be a powerful medium for innovation, experiences, motivation, sales and marketing and can be transformational for both business and consumer audiences.

1.6. A definition of the industry covers:

1.6.1. Conferences and meetings

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.

1.6.2. Exhibitions and trade fairs

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.

ISO 25639-1:2008 (E/F) (ISO, 2018) (revised 2023) 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.

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).

1.6.3. Incentive travel and performance improvement

Incentive travel is a tool used by organisations to motivate their staff and/or channel partners, with the objective of improving performance at both individual and corporate levels. This tool offers individuals or teams the chance to qualify for an exceptional travel experience, subject to their attaining pre-set goals.

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. See the *2023 Incentive Travel Index*[2]

1.6.4. Corporate hospitality and corporate events

1.6.4.1. Corporate Hospitality

Corporate hospitality refers to the practice of companies providing special entertainment, amenities, or services to their clients, employees, or stakeholders, often in the context of business functions or events. The aim is to build and strengthen relationships, enhance business opportunities, and create a positive image of the company. Corporate hospitality can include hosting guests at sports events, concerts, special dinners, or exclusive parties, often in a setting that offers premium experiences and networking opportunities.

1.6.4.2. Corporate Events

Corporate events are organised activities or gatherings that are designed to achieve specific business objectives. These objectives can range from fostering team building, launching new products, celebrating company milestones, conducting training sessions, or facilitating networking among employees, clients, or partners. Examples of corporate events include conferences, seminars, workshops, trade shows, product launches, corporate retreats, and award ceremonies. These events are often planned with a focus on aligning with the company's goals, values, and branding efforts.

1.6.5. Outdoor events

Outdoor events are organised activities or gatherings that take place in open-air environments, rather than within enclosed spaces. These events can range from casual get-togethers to large-scale public celebrations and can serve a variety of purposes such as entertainment, socialising, education, marketing, or fundraising. Examples of outdoor events include music festivals, sports competitions, community fairs, outdoor corporate picnics, charity runs, and outdoor markets.

The planning and execution of outdoor events often require special considerations such as weather conditions, permits, logistics, safety measures, and facilities to ensure a smooth and enjoyable experience for attendees.

1.6.6. Music events and festivals

1.6.6.1 Music events are organised gatherings or performances that focus on live or recorded music as the central element. These events can vary in scale, genre, and purpose, and they can take place in a variety of venues such as concert halls, stadiums, clubs, parks, or even virtual spaces. Music events can include concerts, gigs, recitals, DJ sets, and battle of the bands. They may be

[2] Incentive Research Foundation (IRF) and Society for Incentive Travel Excellence (SITE), the Incentive Travel Index (ITI)

organised to promote artists, celebrate music, entertain audiences, or support a cause. The primary aim is to provide a platform for musical expression and enjoyment.

1.6.6.2. Music Festivals

Music festivals are large-scale, multi-day events that feature a diverse lineup of musical performances, often across multiple stages or venues. These festivals celebrate music and culture by bringing together artists, fans, and communities in a vibrant, immersive setting. Music festivals can focus on specific genres (e.g., rock, jazz, electronic), or they can offer a mix of different styles to appeal to a broader audience. In addition to live music, festivals often include other attractions such as food and beverage vendors, art installations, workshops, and interactive experiences. The goal is to create a memorable and enriching experience centred around the love of music.

Both music events and festivals play a significant role in the cultural landscape, offering opportunities for artists to showcase their talents and for audiences to connect and celebrate their shared passion for music.

1.6.7. Sporting events

Sporting events are organized competitions or activities that involve physical exertion and skill, where individuals or teams compete against each other under a set of established rules. These events can take place at various levels, including amateur, collegiate, professional, and international, and they can range from local matches to large-scale tournaments. Sporting events cover a wide array of sports such as football (soccer), basketball, tennis, athletics, swimming, and many others.

The primary objectives of sporting events are to entertain spectators, promote physical fitness, foster sportsmanship, and often, to achieve competitive excellence. These events can be held in various venues, including stadiums, arenas, fields, and even virtual platforms.

In addition to the competition itself, sporting events often feature ancillary activities such as opening and closing ceremonies, fan engagement zones, and social gatherings, making them significant cultural and community happenings.

1.6.8. Business travel

Business travel refers to the act of traveling for work-related purposes rather than for leisure or personal reasons. This type of travel is undertaken by employees, executives, and entrepreneurs to attend meetings, conferences, trade shows, client presentations, training sessions, or other professional activities that require physical presence. Business travel can be domestic or international and often involves various modes of transportation such as airplanes, trains, and cars, as well as accommodations in hotels or other accommodation facilities.

The primary objectives of business travel include:

1. Networking: Building and maintaining professional relationships.
2. Business Development: Exploring new markets, meeting potential clients, or closing deals.
3. Collaboration: Working closely with colleagues, partners, or stakeholders.
4. Training and Development: Attending workshops, seminars, or courses for professional growth.
5. Representation: Representing the company at industry events, trade shows, or conferences.

Business travel is a critical component of many industries, facilitating face-to-face interactions that can enhance communication, trust, and collaboration, thereby contributing to business growth and success.

1.6.9. Place

The concept of "place" plays a crucial role in the events industry, as it encompasses the physical location or venue where events take place. The choice of venue can greatly impact the success and overall experience of an event. Here are some key reasons why place is important in the events industry:

1. Atmosphere and Ambience: The physical environment of a venue sets the tone and creates a specific atmosphere for the event. The design, décor, lighting, and acoustics of the place contribute to the overall ambience and mood, enhancing the guest experience.

2. Convenience and Accessibility: The location of the venue can significantly impact the attendance and participation in the event. A centrally-located venue with good transportation links and ample parking facilities makes it easier for guests to access the event, leading to higher attendance rates.

3. Capacity and Layout: The size and layout of the venue should align with the event's requirements in terms of capacity, seating arrangements, and flow of activities. A well-suited venue ensures that attendees are comfortable and engaged throughout the event.

4. Brand Image and Identity: The choice of venue reflects the brand image and identity of the event organizer. A unique or prestigious venue can elevate the perceived value of the event and leave a lasting impression on attendees.

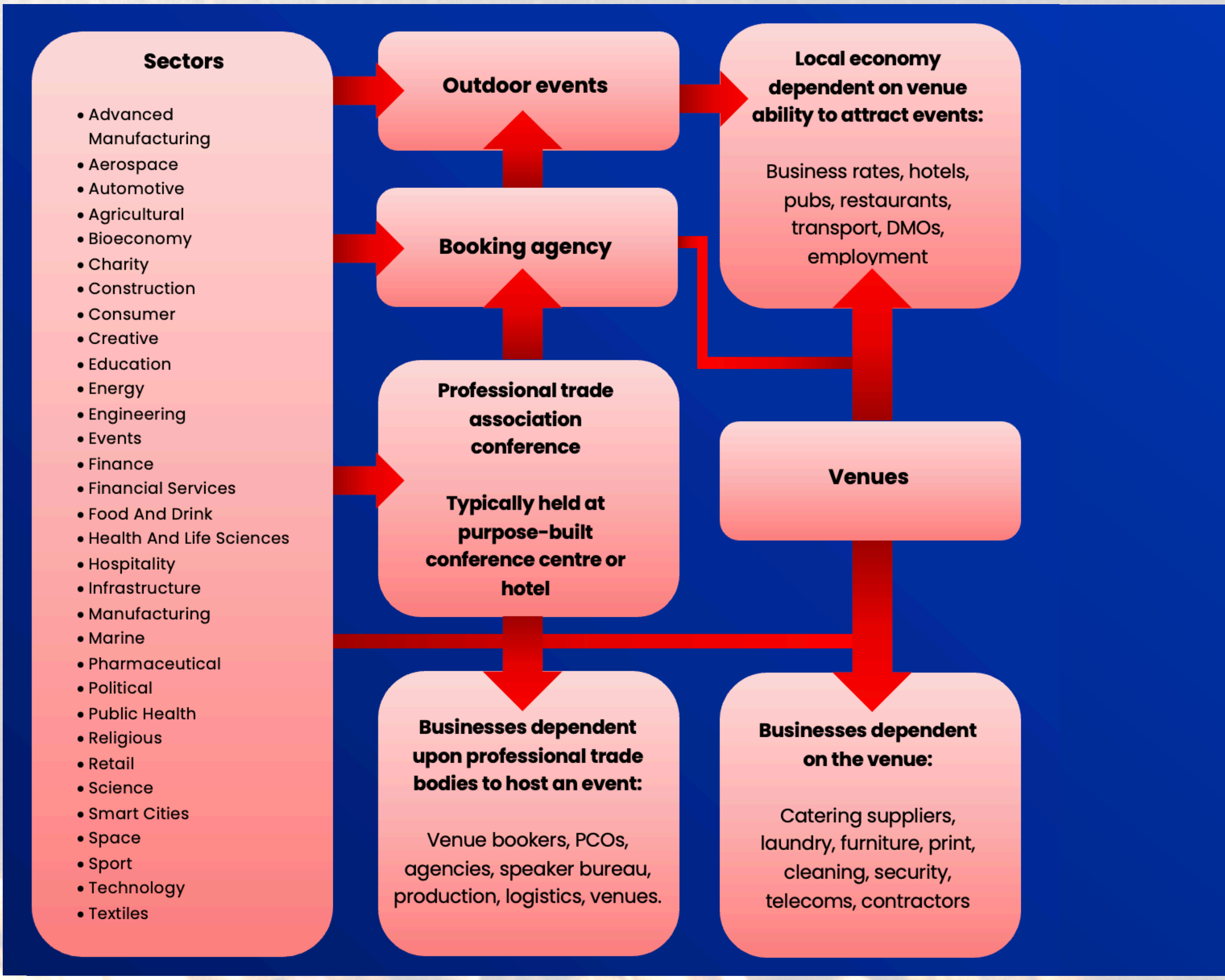
5. Logistics and Infrastructure: The infrastructure and facilities available at the venue, such as audiovisual equipment, staging, catering services, and technological support, are essential for the smooth execution of the event. A well-equipped venue can enhance the overall event logistics and operations.

6. Local Culture and Context: The local culture, heritage, and surroundings of the venue can add a sense of authenticity and local flavour to the event, creating a unique and memorable experience for attendees.

In conclusion, the selection of the right place or venue is a critical decision in event planning, as it can impact various aspects of the event, including attendee experience, logistics, branding, and overall success. Event organisers must carefully consider the importance of place in creating meaningful and impactful events.

See Appendix One for a detailed breakdown of UK Places.

The graphic below outlines the elements of the UK Events industry and its dependent relations



2. UK events industry – situation analysis

2.1 Introduction

2.1.1. Events in the UK play a major role in the economic, business and social fabric of the nation. Commercial business events form one part of the overall mix that includes arts, cultural, educational, manufacturing, medical, music, political, scientific, sporting, technology, trade and consumer exhibitions and events. The industry plays host to an impressive line-up of high-profile events throughout the year and there is a growing broad consensus both in the business community and politically that events have an important role and add value to the overall economic, social and cultural benefits for the UK.

Whether this be in attracting inward investment, knowledge transfer and expertise, developing and attracting international students, driving increased visitor spend in destinations, boosting sales and growth in businesses and importantly developing positive change for environmental issues, or simply helping people to feel good and enjoy themselves boosting well-being. Events have a significant part to play in the UK's industrial and social success.

2.1.2. Events in the UK provide employment opportunities at all levels but changes in the structure of the industry post-pandemic have affected the make-up of the employment landscape within different sectors in the industry. Two examples of these changes: In the live event sector, the PLASA Global Survey 2022[1] shows that the number of employees is 10% down compared to pre-pandemic levels and with a greater propensity of freelancers employed. In the exhibition sector the 2022 EIA Economic Impact of Exhibitions in the UK Survey[2] identifies 47,124 direct jobs (55,316 pre-pandemic), and 99,000 total jobs (113,539 pre-pandemic).

Salaries increased immediately after the pandemic as businesses needed to recruit and attract talent (2021-2022) but event industry salaries have increased only slightly since and there are indications of a shift to more events sector jobs based outside London than pre-pandemic with the gap

[1] Plasa Global Report 2022
[2] EIA 2022 Economic Impact of Exhibitions in the UK

between London and the rest of the UK closing. The only slight difference in higher salaries in London simply comes down to living costs[3]. The cost of living is cited as putting pressure on businesses to pay higher salaries but other trends in salaries and employment conditions include trends towards a four-day week, better pensions, health benefits such as dental insurance, gym membership and overall health insurance are desired by over double the percentage of those wanting a company mobile phone or workplace flexibility[4].

The type of events held has changed, remote work has emerged as a significant, seemingly permanent, fixture in the workplace. Dispersed workforces have led to a decline in traditional office usage. Corporations must get their teams together and as a result, meetings are being held more frequently. In addition, incentive travel is gaining strategic importance as a tool for fostering collaboration, enhancing company culture, and helping achieve business objectives. By investing in unique and meaningful experiences that align with company values, organisations can boost employee satisfaction, motivation, and overall performance.

2.1.3. Sustainability is high on the agenda for meeting planners, associations and businesses. A study by the International Congress and Convention Association[5] notes that:

"It is encouraging to note that the majority of survey respondents (83%) are actively pursuing sustainability in executing their event practices. Only a small segment of respondents falls into the category of having no established policies or sustainability efforts."

Sustainability in the event industry demands equilibrium among the three inter-related dimensions: environmental, economic, and socio-cultural. Imbalances in these dimensions can have far-reaching effects.

2.2 The Value and Benefits of Events

These changes are indicative of some of the impacts of the pandemic on events in the UK but which is now recording a return to pre-pandemic levels

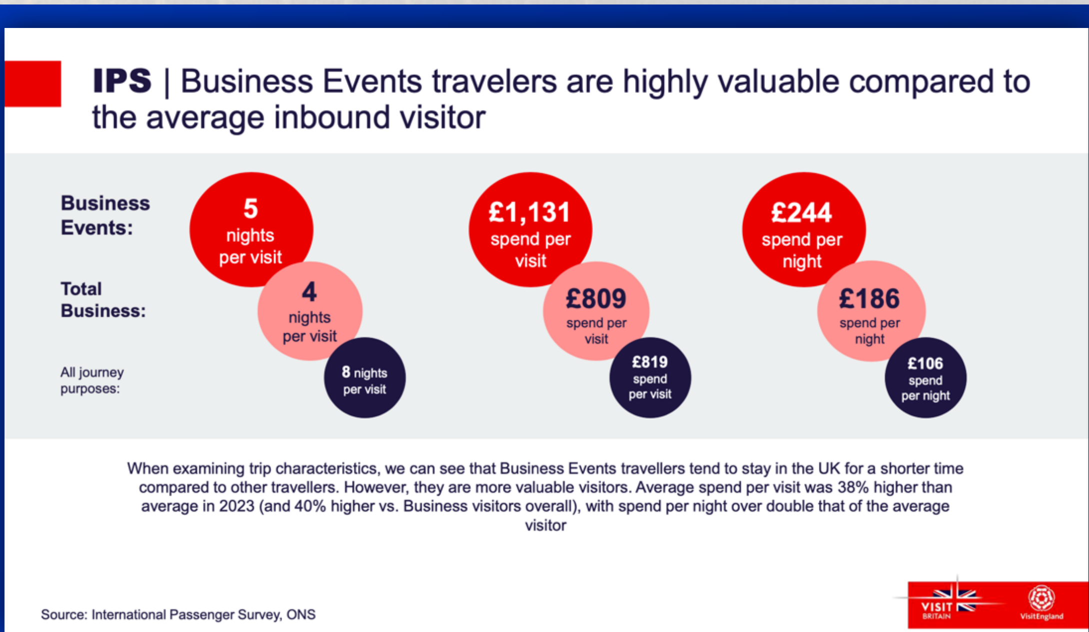
[3] Mustard Jobs Salary Guide 2023
[4] The Annual Event Industry Salary Survey 2023
[5] ICCA International Sustainability Report 2023

of volumes and increases in achieved rates in venues. The UK Conference and Meetings Survey[6] puts overall spend on conferences and meetings in the UK at £16.3bn in 2022 compared to 17.6bn in 2019. These figures align with predictions made in a report by Cities Restart in 2021[7] suggesting that should this trend continue values will be at £25bn by 2026. As the world has returned to 'normal' after the pandemic there is a renewed emergence of international events in the UK. In selected years since 2016, VisitBritain has included an added question in the International Passenger Survey (IPS) [8] to identify types of Business travellers. Within the categories included, the **Meetings, Incentive, Conference, Exhibitions (MICE)** category includes Business travellers for:

• Meetings (21+ attendees)
• Incentives/Team building
• Conferences/Conventions/Congresses
• Exhibitions/Events/Trade shows.

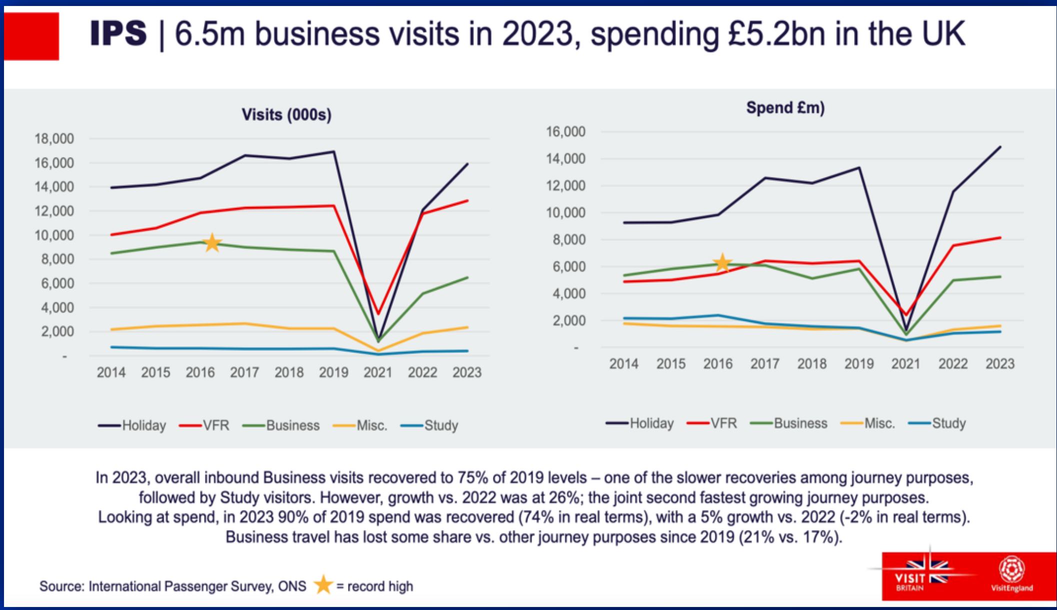
The most recently available statistics from the IPS are:

- Business events' average spend per visitor is 38% higher than the average visitor, with a spend per night over double than the average visitor
- Overall there were 6.5m business visitors in 2023, spending £5.2bn in the UK (75% of 2019) – so business events recovery stronger vs business travel



Graphic: VisitBritain

[6] UK Conference & Meetings Survey 2023
[7] Cities Restart Report: The Importance of Restarting International Conferences & Business Events to City Economies
[8] International Passenger Survey (IPS)



Graphic: VisitBritain

Note: a. The IPS figures above are for ALL business visits. b. New research by VisitBritain is underway on volume and values and the findings of that study will be included in an update of this report.

2.2.2. In 2022, major sporting events held in the UK brought significant value to the nations – from hundreds of millions of pounds injected into the economy, to destination branding across the world, to community programmes run across the country that enable the entire population to feel included and valued.

UK Sport has assessed the impacts generated by 12 events that have received funds from UK Sport (via National Lottery or Exchequer funding), or the UK Government directly. These events vary widely in size and scale, but each has contributed towards the overall benefits for the UK.

UK Sport reports 2.7M attendance, £135M cumulative direct economic impact and 1600 full time equivalent jobs in its 'The Value of Events 2022'[9] report.

In addition, the Birmingham Commonwealth Games 2022 Evaluation report identifies that the Games delivered approximately £1.2 billion of economic output between 2018 and 2022, £79.5 million of social value and 22,380 full

[9] The Value of Events 2022 – UK Sport

time equivalent years of employment.[10] £18.6 million of direct GVA was generated by the spending of Games-related visitors

2.2.3. Exhibitions and Trade Fairs are a very important part of the events eco-system growing trade, exports and inward investment. In 2023, there were an estimated 1,016 exhibitions at the UK's main exhibition venues. Trade exhibitions accounted for the largest proportion of the market – 42% (i.e. 422 exhibitions). Consumer (or public) exhibitions had a similar share – 40% (i.e. 408 exhibitions). Conferences that incorporated a significant exhibition element (i.e. 500m^2 plus) accounted for 18% of the market. The number of exhibitions was up in 2023 by 12% (over 2022) but there were mixed trends.[11]

The most recent valuation of exhibitions in the UK was £10.9 billion in 2023.[12] Significantly, exhibitions and trade fairs create more value than just the sum of their collective event revenues, it delivers trade and consumer exhibitions which are hugely important to the UK economy, and fuel travel, tourism, and hospitality. It ignites business in the markets served by the events it creates.

It acts as a catalyst for growth bringing together investors, innovators and customers from around the globe to do the deals that drive international trade.

2.2.4. Music Industry. Prior to the pandemic, the music industry events sector was worth £5.8 billion to the UK economy, growing 65% compared to seven years prior. It was worth £6.6 billion in 2022.[13] The Music Venue Trust (MVT) estimates that every £10 spent on a ticket in a live music venue is worth £17 to the local economy.

Music spaces, including recording studios, grassroots music venues and rehearsal spaces, are fundamental to the sector's success. They serve as cultural hubs, helping to develop future talent and attracting people and businesses to an area.

[10] Birmingham 2022 CWG Evaluation – see case studies at appendix 3
[11] The Size and Scale Index for Exhibitions (SASIE) 2023
[12] EIA-Economic-Impact-Study-published-2024
[13] UK Music This is Music 2023

Attendance reached an all-time high with 37 million people generating ticket revenue, ancillary spending at venues and merchandise sales, according to UK Music's Here, There and Everywhere 2023 report.[14] This report identifies 14.4 million music tourists, of which 13.3 million were domestic tourists and 1.1 million were foreign tourists helping to generate £6.6 billion in spending across the year in 2022 and supporting 56,000 full-time jobs. The two reports provide an important cross-reference to the volume and values of events in the live music and festival events scene. Regional variations are identified in the table at appendix one.

2.2.5. The Outdoor Events sector in the UK is recognised as one of the most established, high quality, historical and iconic on the planet. It covers any type of open-air event from music festivals to air displays, to trade fairs, country shows, sporting and cultural events. In our 2020 UK Events report, festivals, fairs and outdoor shows were valued at £6bn, Arts and culture at £5.6bn, Music Events £6.6bn. A current study on outdoor events will update these figures. The British Air Displays Association (BADA) report[15] published in November 2022 stated a value of well over £100m to the UK economy. To avoid double counting, music event values have been excluded from other outdoor event values in this report.

2.2.6. The Incentive Travel market is a significant segment of the overall travel industry, which typically involves organizations providing travel experiences as rewards or incentives for employees or partners.

The UK has a robust corporate sector, has traditionally had a strong incentive travel market. Companies in the UK often use incentive travel to motivate employees, improve team performance, and cultivate loyalty among staff or clients. Destinations within the UK, as well as outbound travel to international locations, are popular choices for incentive programmes.

Incentive travel worldwide is up, with 59% of end users and third parties surveyed for the *2023 Incentive Travel Index*[16] indicating per-person spend in 2024 will be above 2022 levels.

[14] UK Music Here There and Everywhere Report 2023

[15] BADA Annual Review 2022

2.2.7. Business Travel is partially driven by meetings and events with planners taking more responsibility for this element of business travel. This growing trend is identified in a recent survey by Business Travel Show Europe[17] where 35% of respondents confirmed their responsibility for this and 32% anticipating responsibility in the near future.

This merging of roles is driven by the benefits of integrating business travel and meetings, cost savings came out top with 63 per cent, followed by efficiencies on 47 per cent and greater visibility and control on 41 per cent. The UK is 5th highest in value ($43m/£37.4m) for business travel in a poll of nations by the Global Business Travel Association[18]

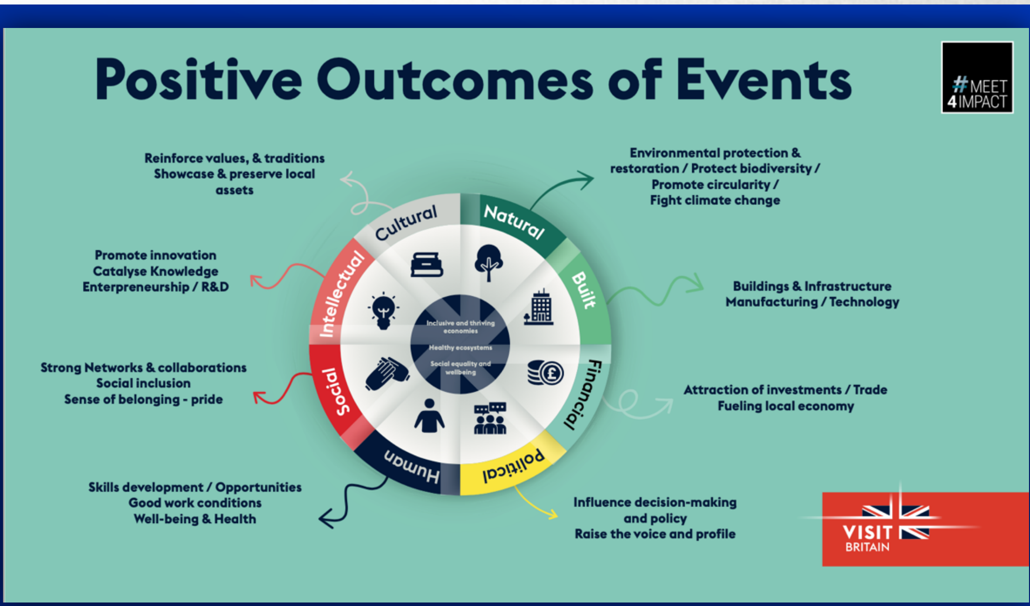
Image courtesy: Anete Lūsiņa on Unsplash

2.2.8 More than statistics...

All of the above statistics refer to economic benefits which is such an important aspect of the value of events but... it is important to note that events be viewed as more than just economic. Events include charitable activities, opportunities for volunteering, creativity, support for social cohesion with many local events taking a pivotal role in how a destination is experienced, how its residents take pride in their location and the social interactions that events bring to people's lives.

[16] The Incentive Travel 2024 Trends Report
[17] Business Travel Show Europe
[18] Global Business Travel Association 2023 Business Travel Index Outlook

Graphic:
VisitBritain



2.3. *The Global Economic Significance of Business Events*

Events globally are responsible for a significant proportion of economic benefit in direct and indirect measure. ICCA publishes an annual report[19] ranking countries and cities on the volume of events held that puts the UK in 6th position in the global rankings in 2023.

The UK has lost one place since the 2018 country rankings but **London made 11th place in the top 20 city listing after** being outside it in 2018. Italy is the biggest mover with 31 more events than in 2018 powering it to 2nd place after the USA which retains top spot but on a much lower volume. Paris retains top city ranking also on a lower number of events. Aside from Italy all destinations show lower volume than pre-pandemic.

2.4. *Impacts of Major Events on Hotel Performance*

The impact of events on hotel performance has been well documented. The chart below from VisitBritain documents the impact that inbound business meetings travel had in this 2023 breakdown of business events visitor type. – note we only include meetings of 21+ here according to their criteria.

[19] ICCA Country and City Rankings for the year 2023.

Graphic: VisitBritain

	Visits (000s)	Visits (% within BE)	Nights (000s)	Nights (% within BE)	Spend (£m)	Spend (% within BE)
Meeting (21+ people)	484	32%	2,248	32%	559	33%
Incentive/Team Building	120	8%	568	8%	120	7%
Conference/Convention/ Congress	542	36%	2,599	38%	619	37%
Exhibition/Event/Trade Show	344	23%	1,508	22%	388	23%

Case Study:

The West Midlands' food and drink, and recreation sub-sectors experienced the fastest growth in 2023, compared with pre-Covid visitor economy figures.

Major events taking place saw visitors flock to the West Midlands, included Birmingham Festival 23, a free-to-access celebration of the region's cultural talent. Harry Styles and Arctic Monkeys wowed sold-out Coventry Building Society Arena crowds, and the British Open Squash, The Ashes and World Trampoline Championships drew national and international sports fans to the region. The Black Country Living Museum launched its new 1940s-60s high street, and the Sandwell Aquatics Centre and University of Wolverhampton at The Halls opened their doors to the public for the first time.

The West Midlands welcomed business events including the International Technology Enabled Care Conference 2023 (March 2023, The ICC); RCN Education Forum National Conference and Exhibition (April 2023, BCEC); CIKM 2023 (The Conference on Information and Knowledge Management (October 2023, Eastside Rooms); ISBE (Institute for Small Business and Entrepreneurship) (November 2023, Aston University).

Samantha Brown, Head of Conference Aston, said:

"Birmingham and the wider region continue to be a top destination for the meetings industry, and that has been reflected in our performance. Despite the challenging economic backdrop, we have had a strong year with overall occupancy growing by 2.7% year on year. Hotel bookings were boosted by major sporting and music events at the region's leading venues, building on the growing reputation following the Commonwealth Games. Looking ahead, there is a clear need for an array of venues to meet the needs of the changing conferencing market. Residential programmes and UK domestic conferences continue to grow, maintaining a preference for central locations, with some smaller meetings in lesser demand as the needs of business and travellers change." *Source: MeetBirmingham.com 17th July 2024*

Internationally, concerts such as Taylor Swift's Eras Tour and Beyoncé's Renaissance Tour dominated headlines in 2023, and events were a major driver of hotel performance around the world in 2023.

The investment attracted by these events can have a major positive impact on host destinations and is significant to local, regional and national economies as investment flows through, new facilities are created plus the follow-on legacy as these assets attract new business that benefits the destination.

2.5. Demand

As can be seen from the above examples hotel occupancy provides one measure for demand and price trends. Scale and types of event determine the impact and there is a myriad of reasons for the outcomes. To further investigate demand trends post-pandemic, we can look at other sources to provide affirmation of the demand/price juxtaposition.

VenuePerformance has been recording demand and price trends on a live tracking basis since 2019 and we have been kindly supplied with data from VenuePerformance' system to demonstrate this. *See:* www.venueperformance.com

2.5.1. Conferences

The value and volume of the market for conferences in 2022 shows average attendee numbers are 144 and average achieved revenue at £105 per delegate.

In 2023 there was a slightly lower average number at 142 and average delegate revenue of the same at £105. This is based on all confirmed business for the two years. This indicates that conferences are more likely to be for common interest groups or cross-industry sectors, associations, societies, governmental bodies. Conferences are also often booked by individuals for self-development, for keeping up to date with sector trends, technical updates and knowledge transfer.

For conferences a pattern emerges of more consistent levels of bookings with just two negative drops in April 2022 and August 2023 but a more continuing general rise in completed bookings through both 2022 and 2023.

2.5.2. Meetings

Bookings for meetings have continued to rise since January 2021 with booking demand and completed bookings following a similar pattern. There's a noticeable drop in completed bookings in December 2023 but this was still at a slightly higher level than in 2022.

Meetings in 2022 confirmed an average of 51 delegates and an average revenue of £20 per attendee. In 2023 average attendee size dropped to 14 but attendee revenue increased to £97.50. This is a significant shift in the meetings market. There are several possible explanations for this change.

2.5.3. Demand:

The demand trend here includes the general acceptance and continued use of virtual meetings post-pandemic; more meetings held with both face-to-face and virtual options; businesses have not entirely returned to fulltime office working; lower levels of personnel within businesses generally and automation in businesses; efficiency drives to communicate internally with fewer meetings held in external venues; a trend to use meetings more in the marketing and communications function with more emphasis on return on investment.

2.5.4. Supply:

Post-pandemic challenges for venues include: attracting sufficient personnel of the right calibre; increased wage costs; increased operating costs, particularly fuel and insurance; both of the latter contributing to the passing on of price rises to the end user. There is also reduced capacity as many venues have converted meeting space to alternative use. Plus, meetings organisers seeking different types of venues such as barn conversions which are not always on traditional venue listing sites.

Similarly, the records of all types of events show a continuing upward trend throughout 2022 and 2023.

3. The global events landscape

3.1. Introduction

We live in a global marketplace, and competition from other destinations, both cities and countries, grows ever stronger. This chapter sets the scene for what is happening outside of the UK. In compiling the data and commentary, we have used the most robust and up-to-date reports, which are known and trusted by the key players in the events industry.

We have highlighted key findings and sentiments from planners and destinations to provide a comprehensive perspective. As there is always so much news coming from regions across the globe, we have hand-picked just a few news items that caught our eye, which show advancements outside of the UK.

3.2. ICCA Country and City Rankings - Released May 2024

The International Congress & Convention Association (ICCA) rankings 2023 cover meetings organised by international associations which take place on a regular basis. The research team reviewed all meetings submitted by ICCA members, resulting in a report that included more than 10,000 meetings that took place in 2023.

ICCA worldwide country and city rankings measured by number of meetings organised in 2023. 2018 totals and rankings in brackets shown for comparison[21]

ICCA Rankings 2023

Number of meetings per country.

	2023	(2018)
1 USA	690	947 (1)
2 Italy	553	522 (6)
3 Spain	505	595 (3)
4 France	472	579 (4)
5 Germany	463	642 (2)
6 United Kingdom	**425**	**574 (5)**
7 Japan	363	492 (7)
8 Netherlands	304	366 (9)
9 Portugal	303	306(11)
10 Canada	259	315(10)
11 Republic of Korea	252	273(12)
12 Sweden	227	257(14)
13 Australia	219	265(13)
14 Austria	203	240(16)
15 Belgium	202	252(15)
16 Greece	190	-
17 Poland	179	211(19)
18 China-P.R.	170	449 (8)
19 Czech Republic	157	-
20 Brazil	156	233(17)

Number of meetings per city

	2023	(2018)
1 Paris France	156	212(1)
2 Singapore, Singapore	152	145(8)
3 Lisbon, Portugal	151	152(6)
4 Vienna, Austria	141	-
5 Barcelona, Spain	139	163(4)
6 Prague, Czech Republic	134	-
7 Rome, Italy	119	-
8 Madrid, Spain	109	165(3)
9 Dublin, Ireland	104	104(18)
10 Seoul, Republic of Korea	103	122(15)
11 London, United Kingdom	**99**	**-**
12 Berlin, Germany	97	162(5)
13 Tokyo, Japan	91	123(13)
14 Buenos Aires, Argentina	90	133(11)
15 Athens, Greece	88	-
15 Bangkok, Thailand	88	135(10)
17 Copenhagen, Denmark	87	120(16)
18 Amsterdam, Netherlands	84	123(13)
19 Brussels, Belgium	76	112(17)
20 Stockholm, Sweden	74	103(19)

What's important to look at is the volume of all meetings compared to the position before Covid. Prior to Covid, it's easy to see that many more meetings took place.

With a total of 10,187 meetings taking place in 2023, (a 17% drop) when compared with 2018's 12,937 which was the highest annual figure recorded by ICCA. 2018 figure represented an increase of 379 (3%) meetings compared to the number recorded at the same time in 2017. These are the latest figures available.

3.3 Travel and Tourism Competitiveness

[21] ICCA Country and City Rankings for the year 2023

Moving from what's happening with international association meetings, it's worth looking at how the UK compares to other countries in terms of **Travel and Tourism competitiveness**.

Covering 117 economies, the World Economic Forum's Travel & Tourism Development Index[22] measures the set of factors and policies that enable the sustainable and resilient development of the Travel and Tourism (T&T) sector, which in turn contributes to the development of a country.

The top ten countries are:

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

According to this, the UK is in 8th position in the top 10. A fall of two places since 2019. Whilst both the ICCA Rankings and the Travel and Tourism Competitiveness report indicate the UK's position, they need to be read alongside a number of 'business activity' reports.

3.4. Cvent Top Meeting Destination Report

When we look at the work of Cvent and their Top Meeting Destinations[23] reports, Cvent evaluated 12,500+ cities worldwide listed on the Cvent Supplier Network. Activity was tracked between January 2023 and December 2023. Rankings were determined by a set of qualifying criteria, including: the number of total room nights booked; the number of unique electronic request-for-proposals (RFPs) sent through the marketplace to venues within the city; the total value of the RFPs submitted; and the actual awarded value for meetings booked. *(See section 4, Regions)*

[22] World Economic Forum's Travel & Tourism Development Index
[23] Cvent Top Meeting Destinations https://toplists.cvent.com/top-destinations-4/

About the Cvent Supplier Network

The Cvent Supplier Network features more than 300,000 hotels, resorts, and special event venues, serving as one of the world's largest and most accurate databases of detailed venue information.

In 2023, more than $16 billion was sourced through Cvent's sourcing networks. The CSN contains listings of hotels and other venues in 18 languages that can be searched and filtered based on over 200 characteristics and criteria.

3.5 Incentive Research Foundation – Incentive Travel Report[24]

Incentive travel is a useful indicator for the rest of the events industry, reflecting its trends, growth, progress, and dynamics. It's, therefore, useful to review the latest intelligence.

The Incentive Research Foundation (IRF) published its trends study in 2024 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. A selection of the findings is as below:

The good news is that incentive travel is up. 59% of end users and third parties surveyed for the 2023 Incentive Travel Index indicate that per-person spending in 2024 will be above 2022 levels.

Incentive travel needs to be memorable, and planners are developing strategic and creative ways to design unique experiences at exciting, new destinations while living in the budget/inflation paradox.

Organisations have a strong drive to use destinations that are new to their group, with 71% of respondents to the 2023 Incentive Travel Index citing this as a priority. North American buyers reported not using Oceania, Alaska, and South Asia but are open to considering these new destinations.

When working with new destinations and off-the-beaten-path locations, planners have noted that incentive-level standards must be maintained, and using unique destinations cannot come at the expense of luxury. The top

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[24] Incentive Research Foundation (IRF) and Society for Incentive Travel Excellence (SITE), the Incentive Travel Index (ITI)

destinations planners intend to use in 2024 are the Caribbean, Mexico, and Western Europe.

Planners are working with new properties for popular incentive destinations to create fresh experiences for returning participants. The latest (2023) Incentive Travel Index reported that cultural sightseeing experiences are the most appreciated activity in an incentive travel programme. Including elements that incorporate local culture has a long-lasting impact on attendees who stay with them long after returning home. These authentic experiences create buzz and motivate performance across the company.

3.6 UFI Global Exhibition Barometer Survey – January 2024

The 32nd edition of the "UFI Global Exhibition Barometer"[25] study is based on a global survey that was concluded in January 2024. It represents up-to-date information on the status and outlook of the global exhibition industry. The Barometer has a global reach, with 419 companies participating from 61 countries and regions.

The 32nd Barometer asked participants for their company's gross turnover for 2023 and their expectations for 2024 compared to 2019. The survey also aimed to gather insights on the progression of operating profits for 2023 compared to 2019 and the preceding year. It's important to note that the results do not take account of inflation which varies from one country to another.

The year 2023 witnessed the recovery of exhibitions, with revenues reaching an average comparable level to 2019. According to the survey, the outlook is very positive, with 2024 revenues expected to grow by an average of 15%.

The general trends vary from country to country:

Revenues from 2023 compared to 2019 vary from 127% in India, 120% in Spain, and 110% in Italy to 88% in Colombia and 85% in South Africa, or to 82% in Germany and 80% in Thailand. In terms of operating profits compared to 2019 levels, around half of the companies declared an increase of more than 10% for 2023.

[25] UFI Global Exhibition Barometer

The highest proportion of companies expecting a profit increase of more than 10% when compared to 2019 are in the UAE (91%), Saudi Arabia (80%), India (71%), Brazil (67%), and Mexico (64%)

In looking at plans for workforce development in the coming 6 months:

Globally, 52% of companies declared that they plan to increase their staff numbers, and 45% declared that they will keep current staff numbers stable.

The highest proportion of companies planning to add staff were in Saudi Arabia (100%), the UAE (82%), India (80%), Greece (73%) and Malaysia (67%).

The most important issues for their business in the coming year are:

"State of the economy in the home market" (22% of answers globally – compared with 14% six months ago - and the main issue in all regions and most markets).

"Global economic developments" come in as the second most important issue globally (17% of answers, compared to 12% six months ago), followed by "Geopolitical challenges" (12%).

"Internal management challenges" (10%) and "Impact of digitalisation" (6%), which were the top two issues six months ago (with 21% and 17% of answers, respectively), are now preceded by "Competition from within the exhibition industry" (11%) and "Sustainability / Climate" (10%).

The analysis of the trend around top business issues over the 2016-2024 period identifies several important shifts:

"Global economic developments" & "State of the economy in the home market" are back as the main issue, with 40% of answers.

"Geopolitical challenges", aggregated with "Impact of COVID-19 pandemic on the business", that both were not in the initial list of issues in 2016 appear, combined, in second position, with 15% of answers.

"Sustainability / Climate" combined with "Other stakeholders' issues" is the fastest growing issue, tripling from 4% of answers in 2016 to 13% in 2024.

“Competition from within the exhibition industry” (11% in 2024) has gone up slightly again since 2021 but remains less than half of what it represented in 2016 (24%).

“Internal management challenges” is next, with 10% of answers, half of what it represented in the last 2 years.

The combined impact of digitalisation and competition with other media has dropped from 30% or more in the last two years to 10% in 2024. On the technology issue, a specific question on the impact of **generative AI** on the exhibition industry was asked to shed light on this emerging digital transformation. The survey aimed to assess the current use of AI across various business functions and gauge future expectations.

Globally, there is an overwhelming consensus that AI will affect the industry, with 91% of companies stating this, up from 87% in the previous edition.

The areas expected to be most affected by the development of AI are “Sales, Marketing and Customer Relations,” “Research & Development” (both 80%), and “Event production” (65%).

These are precisely the areas where generative AI applications are most commonly used (37%, 35%, and 20%, respectively).

3.7. The Business of Events (TBOE)

3.7.1 Global Destinations Report November 2023[26]

The Global Destinations Report featured an extensive online survey featuring nine multiple-choice questions, an open question for anecdotal comments, and two inquiries for interview interest or report requests, was conducted. Here are the key findings and insights from the responses of 904 participants, offering a comprehensive view of the global business events landscape.

3.7.2. Funding Dynamics and Departmental Affiliations

Most survey participants identified as Part Government/Membership (33%) or fully Government funded (32%), with a notable percentage reporting to the Department of Tourism. This underscores the vital role government entities play in financing destination activities.

[26] The Business of Events (TBOE) Global Destinations Report

3.7.3. Team Size and Fulfillment Challenges

Survey and interview respondents expressed a shared concern—their teams were perceived as too small to effectively fulfill their destinations' multifaceted objectives and needs. This common sentiment emphasises a critical area requiring attention and potential restructuring.

3.7.4. Core Funding Stability and Economic Impact

Analysis of the survey data revealed that 77% of respondents reported either stable or increased core funding since 2022. This positive trend marked a shift from the previous year, with a notable decrease in those reporting funding reductions. Additionally, 75% reported a positive change in the direct economic value of business meetings, underlining the economic importance of such events.

3.7.5. Volume and Bid/Subvention Fund Stability

The volume of business events in 2023 witnessed a significant overall increase, with international events leading the surge. Despite this, most respondents reported no changes in their bid or subvention funds since 2019, suggesting a possible mismatch between event growth and financial support.

3.7.6. Legacy and Impact Assessment

Building on the emphasis on legacy from 2022, the report indicates a prevailing recognition of its importance. However, assessing the evidence of impact poses challenges, with respondents expressing uncertainty, particularly on the global and national levels. This ambiguity may stem from difficulties in measurement or the early stage of impact manifestation.

3.7.8. Advocacy, Funding, and Change

General comments from survey participants underscored a collective need for increased advocacy and government understanding of the value of business events. Calls for better funding, changes in business models, and heightened awareness of the significance of legacy and event impact on the economy and local communities resonated strongly.

Business Model: Most (77%) felt their current business model was fit for purpose, yet almost two-thirds (61%), predominantly European destinations, believed they lacked sufficient human resources.

Funding: Nearly half (46%) experienced budget increases due to governmental recognition and support. Conversely, those with stagnant or reduced funding (54%) perceived a lack of governmental understanding.

Legacy: Legacy was universally acknowledged as important, but half felt their government did not fully appreciate its value. Furthermore, a significant portion lacked the resources to measure, monitor, or nurture business event legacy.

Threats: Common threats identified included climate and sustainability, economic factors, political unrest, and geographical accessibility. Notably, some perceived threats were viewed as advantages for certain destinations, emphasising the nuanced nature of industry challenges.

The importance of such intelligence helps create change for growth and the following quote sums up the position well.

"The business events industry is a critical driver for global economies, generating roughly $662.6 billion in direct GDP. The 2023 Global Destination Report 2023 shows that, despite this, there is ground to make up when it comes to the need for advocacy and a greater understanding from the Government of the value and intrinsic benefits of business events.

There's a significant need for better funding and for a change in business models so that destinations have the capacity to deliver the benefits business events can bring, such as leaving a positive legacy in the economy and local communities.

To move this forward, it is essential that destinations collaborate to share, discuss, and debate insights and initiatives so that together, we can raise the profile of business events and the significant economic and social impact and change they can drive."

Claudia Hall, Exhibition Director, IBTM World

3.8. International Planner Sentiment Report

In July 2023, The Business of Events released its 2023 International Planner Sentiment Report[27]. The report illustrates the current thinking of event buyers from a range of disciplines across the UK, Europe, and North America regarding their priorities when selecting a destination or venue.

The report tracks data from 2022 and indicates a relatively stable level of sentiment from planners. However, the importance of skills, equity, and sustainability has all tracked higher in this year's report, reflecting the increasing importance of those areas within the events sector and the focus that has been on them during the past 12 months.

The report shows the current thinking of event buyers from a range of disciplines across the UK, Europe, and North America in terms of their priorities when selecting a destination or venue

Tracking the data from 2022, planners' sentiment was relatively stable, albeit with the usual regional variations. However, the importance of skills, equity, and sustainability has all tracked higher in this year's report, reflecting the increasing importance of those areas within the events sector and the focus that has been on them during the past 12 months.

Key Highlights are:

- Sustainability is tracking higher across all regions, although it remains lower within the North American market.
- Skills & Talent and Equity & Diversity are marginally higher
- Cost and value for money remain high across all buyer markets
- Destination brand and market support remain highly important, but stable compared to 2022.
- Venue quality and quality of welcome are both seen as highly important, and as with 2022, are of significant importance to North American markets
- Accessibility and ease of travel continue to be tracked at the top in terms of sentiment. North American planners again regard safety & security as the highest importance of all three regions compared to 2022.

[27] The Business of Events 2023 International Planner Sentiment Report

4. Future challenges and opportunities

4.1 The Opportunities (Future) for the UK Events Industry

The pandemic led to a decline in live events. Recovery started at the end of the lockdowns, and now AI is dominating conversations with business leaders. Change is the constant.

While we cannot predict the exact state of the events industry in the next two to three years, one thing is clear: events are in demand and once more the events industry is an influencer in the corporate value chain.

This chapter looks at the key areas of: People, Technology, Sustainability, Legacy, Advocacy

After looking into each, we make suggestions for an 'opportunity for growth' that is needed to propel the events industry and business growth forward. After all, a strong events industry means a strong economy.

4.2 People - Skills and Talent

People are critical to the success of any industry, but none more so in the events industry. If you don't get on with people, working in events is not the space to be in.

With businesses, politicians, and public figures banking on big gatherings and meetings to connect with their audience, the relevance of event management has grown exponentially in recent times, but of course in-person events were effectively stopped in their tracks due to Covid.

Somewhat unsurprisingly and backed up by research from Mintel, the pandemic's uncertainty led many event professionals to explore alternative careers, some temporarily but many permanently, damaging the industry's emergence. Staff shortages have also been exacerbated by the UK's EU exit.

However, there are signs of recovery. According to the Meetings Industry Association Insights Report[29], opportunities abound in 2024.

Their latest survey, conducted in February 2024, reflects the response of 117 professionals representing organisations within the business meetings and events sector, with 74 (63%) representing an event venue and 37% an event supplier.

Almost half (49%) of organisations state their workforce was bigger on 1 January 2024 than it was on 1 January 2023, while 40% of organisations state it has stayed the same.

'Returnerships' (Return to Work Scheme for Over 50s) offer an alternative way to fill vacancies. Just 15% of organisations are currently offering these.

By contrast, almost half of the organisations (47%) are now employing an apprentice, suggesting they are adopting different approaches to overcome staff shortages.

4.3. Attracting Talent

The UKEVENTS Report 2020[30] noted that attracting young, diverse, and creative talent is and always will be an ongoing priority. Moving forward, the industry requires new skills, such as technical skills (managing and developing hybrid/virtual events), data-related skills (e.g., data pools, data mining, CRM), and commercial skills (e.g., sponsorship and new business models).

Whilst numerous event management courses, at different levels of undergraduate and postgraduate, are offered by UK universities, there is no clear career path to follow. However, in some ways, this is an advantage to an events industry that thrives on working with people of different cultures, generations, and perspectives.

What's clear is that people want to work for organisations that look after their people and enable them to create, develop, and grow. The most successful

[29] Meetings Industry Association https://www.mia-uk.org/Insight-Surveys

[30] The UKEVENTS Report 2020

organisations understand how to meet, manage, and exceed their employees' expectations.

It’s also clear that attracting talent involves more than an attractive salary and bonus offer.

According to The Future of Work Report, C2[31], employers need to earn the commute. With remote and hybrid work being the new normal, employees now require new incentives to return to the office. The value proposition of a job, in addition to being at a good company with a good manager and opportunities for career growth, has now expanded to include how and from where we conduct the work itself.

Employers are now finding themselves in a situation where a one-size-fits-all approach is no longer effective. If companies really want to find compelling enough reasons to come into an office, they need to address how to attract and keep talent according to individual work-style preferences.

This issue of dispersed workforces is highlighted in the Skift and IMEX research, as remote work has emerged as a significant, seemingly permanent fixture in the workplace. According to the Upwork Research Institute[32], 32.6 million Americans are expected to work remotely by 2025.

According to findings from The Annual Events Industry Salary Survey[33], produced by You Search & Select, 85% of respondents said they would not consider an employer that didn't offer hybrid or remote working.

Some companies have taken the approach of reviewing their whole package of benefits. Dale Parmenter, CEO at DRPG, comments: "We knew a refresh of our benefits system was needed, and it was clear that this could not be a decision made top-down. We have now implemented a brand-new benefits scheme in which every team member has their say. It's not only given a more reflective and flexible list of benefits for our team but also installed the Next-Gen board with a sense of collective leadership and empowerment."

4.4. Apprenticeships

[31] The Future of Work Report from the IBTM World Trends Report
[32] Upwork Research Institute – from Skift and IMEX ‘What’s New in Events’
[33] The Annual Events Industry Salary Survey

For people who do not study at a college or university and take the path of getting on-the-job training, apprenticeships are a good way of discovering what it's like to work in the Events Industry.

To encourage this, Events Apprenticeships (EA), a not-for-profit CIC (Community Interest Company) organisation, helps develop and provide recognised routes into events to allow people from all backgrounds and ages to gain experience and relevant professional qualifications within the industry. It aims to break down barriers to entry and progression to attract a broader pipeline of potential talent.

EA is developing a Trailblazer Group to create and adapt a suite of industry related apprenticeships. This is a group of employers recognised by the Institute for Apprenticeships and Technical Education (IfATE) and reflective of those who employ people in the occupation, including small employers.

Ensuring sustainability, diversity, equity and inclusion are integrated in all areas of apprenticeship development EA will signpost more relevant apprenticeships, launch further apprenticeships, evolve and grow existing ones with further development and higher levels thus supporting career development and growth. Trailblazer group fully operational and includes employers from each of the 'seven sectors' of the industry. New 'marbled' apprenticeship has already launched as part of the 'security front line' apprenticeship, level 3 New 'marbled' apprenticeships to be reviewed that are industry related, to include but not limited to, carpentry and joinery, rigging, supply chain.

4.5. Returnerships

Another way of attracting talent is through returnerships. A 'returnership' initiative was announced by the government in the spring budget 2023 which was intended to bring together three programmes to help get older workers back to work. Unfortunately, in the autumn of 2023 the government confirmed that the 'returnerships', apprenticeship programme to entice the over 50s back into work announced in the spring budget, would only see older workers directed to existing schemes.

While this change is disappointing, it's essential that employers continue advocating programmes and initiatives that support older workers and promote inclusivity in the workplace. The incoming Government, elected on 4th July 2024 has promised employment reform in its manifesto but does not specifically set out a policy for an over-50's workers initiative.

Getting more over-50s back into work would significantly boost the economy and productivity, while easing inflation and addressing the shrunken labour market. The onus is therefore on employers, to be part of the solution, working together with the Government to understand how to make the workplace and our economy fit for older workers.

We need to look at what we can offer, considering flexibility, bespoke job specs and financial incentives. Also, it's crucial to remember adaptability; more experienced workers have already lived and worked through some of the most dramatic technological advances and are no strangers to adapting to change. This should be a huge benefit to organisations...

It's essential that we focus on supporting a multi-generational workforce to help the current labour market challenges. Moreover, it's critical that we give more experienced colleagues the opportunity to work and share their valuable skills and knowledge with younger generations. It's not enough to purely focus on recruiting young people. We need to adopt and adapt talent strategies so businesses can thrive in the digital economy.

4.6. The Future of Talent in the Events Industry

The conferencing and events industry is addressing the staffing challenges in a number of ways, including investing in technology and forming partnerships with educational institutions in a bid to nurture a new generation of professionals through apprenticeships. (See 4.4)

How we work and view work has changed, while technologies like AI are reshaping how work is done. In a fast-paced industry like ours, highly skilled and committed workers drive exceptional value for clients. It's only fair that compensation packages can meet the needs of top talent.

4.6.1. Events Education

A White Paper jointly commissioned by the Association for Tourism in Higher Education (ATHE), the Council for Hospitality Management (CHME) and the Association for Events Management Education (AEME) reports on the future of Tourism, Hospitality and Events (THE) Management education in the United Kingdom (UK), in the context of increased stakeholder pressure and shifting government policy.

It outlines implications on the Further Education (FE) and Higher Education (HE) sectors, at various levels, including funding, enrolment, progression pathways, and graduate outcomes. This extract from the white paper provides an insight into the changing demand for event management education.

Within the Events Management subject area (HESA CAH code 100083), a total of 99 courses were offered in 2021/2022 at 45 universities - with over 32% of these courses recording 0 acceptances, and a further 30% of courses recording 10 acceptances or less. The highest acceptance numbers have been noted for a Business and Events Management course (75 acceptances) followed by an International Tourism and Events Management course (70 acceptances). Events courses linked to Design, Entertainment and Performance as well as Live and Technical Events appear to have gained in popularity, with the latter recording 30 acceptances in 2021/2022. Less popular courses include Events Management and Marketing Management, which recorded low acceptance numbers. Twenty five out of the 99 courses analysed are either no longer being listed or are not recruiting for 2023/2024. It is also worth noting that some of the universities changed the names of their courses (e.g. from Events Management to Events Management and Innovation at one institution).

The following graphics show the changing demand for Undergraduate (UG) and Postgraduate (PG) courses over the three years 2020 to 2022:

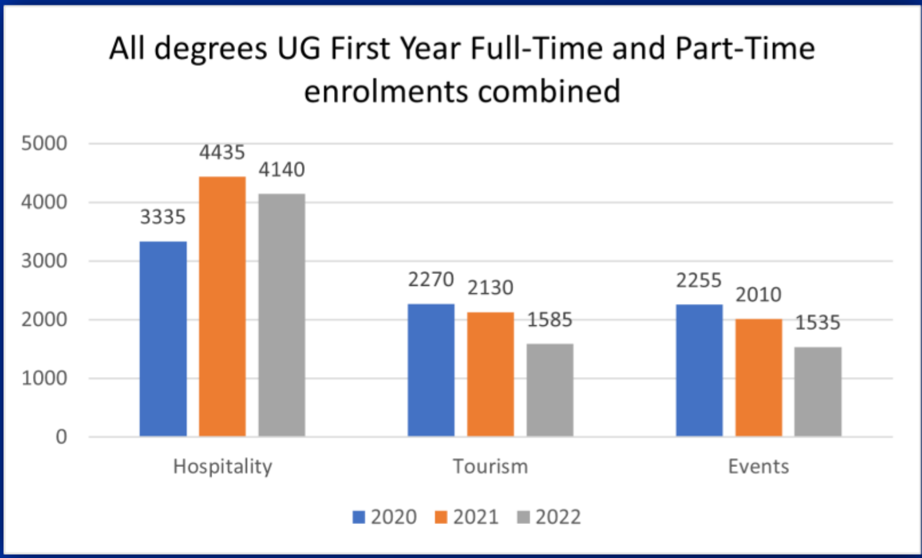

Figure 1. Tourism, Hospitality and Events Undergraduate Degrees – Year 1 Full Time and Part Time Enrolments

(source: based on data retrieved from HESA, 2023)

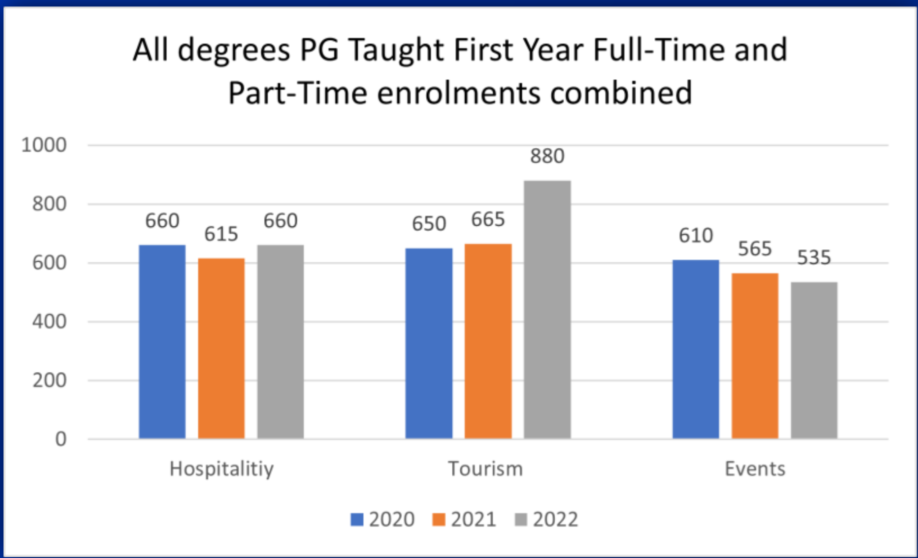

Figure 2. Tourism, Hospitality and Events Postgraduate Degrees – Year 1 Full Time and Part Time Enrolments

(source: based on data retrieved from HESA, 2023)

One of the white paper's conclusions on the future of Tourism, Hospitality and Events Management (THE) education, is shaped by a three-dimensional need for increased industry and government involvement, a stronger collaboration between education providers, industry professionals, industry bodies and policy makers, and a wider recognition of the value of THE education, the significant contribution of THE industries to the UK economy, and vast career opportunities that are available for students and graduates. The government's relevant and valuable support for employers and individuals will help ensure that the events industry moves forward with the ever-evolving challenges of staging professionally produced events.

4.7. Opportunity for Growth

A campaign from government and business to recognise the people who work in the events industry and to encourage more people to enter it because of its value to the overall economy. Events should be recognized as part of the creative industry. UK government figures estimate there were about 2,419,000 filled jobs in the UK creative industries during 2023.

The number is 318,000 higher than in the pre-COVID year of 2019. This is equivalent to a 15.1 per cent increase between 2023 and 2019, giving the creative industries the highest longer-term growth rate of the areas of the creative and cultural economy that fall within the remit of the **Department for Culture, Media & Sport** (DCMS).

Between January and December 2023, the UK creative industries added 23,000 net new jobs, an increase of 0.9 per cent over 2022. Many of these are part of the events industry but this needs to be recognised as such.

4.8. Technology

For many years, the UK has been a leader in technology innovation and adoption, including in the events industry. This sector has experienced rapid growth in the innovation of new technologies and the adoption of both home-grown and imported technology.

This innovation is demonstrated with a UK first—Event Tech Live. Established in 2014, Event Tech Live is the world's only tradeshow dedicated to event technology. The multi-strand conference and exhibition give event technology providers from the UK and overseas the opportunity to present the latest technology. The show takes place in November in the UK and, due to its success, launched earlier in 2024 in Las Vegas.

Its success is in part due to its cost-effective bridging between next-generation event tech suppliers, industry buyers, and investors. The program also includes an awards program that recognises leading-edge innovations and the achievements of companies delivering digital and technological solutions to the events industry globally.

Of course, tech today means talking about AI. The integration of artificial intelligence (AI) in the events industry has sparked intense discussions about its potential and applications in reshaping event marketing practices.

AI tools offer professionals the opportunity to enhance productivity, simplify tasks, and personalize experiences, revolutionizing the way events are planned and executed.

Balancing AI tools with human creativity is essential to maintain the authenticity and effectiveness of events, as overreliance on AI-generated content can lead to audience disengagement and credibility issues.

The UK is at the centre of all things AI. Just take a look at some key stats below:

4.9. AI Growth and Adoption in the UK

Research provided by UK Artificial Intelligence (AI) Statistics And Trends In 2024[34]

- According to the US International Trade Administration, the UK AI market is worth more than £16.8 billion and is expected to grow to £801.6 billion by 2035.
- UK AI companies have increased by over 600% over the last 10 years.
- The UK has an AI workforce of over 50,000.
- AI contributed £3.7 billion to the economy in 2022.
- Britain has twice the number of AI-based companies than any European nation.
- Of the UK's main regions, Greater London leads way in AI-focused companies, being home to 1,387 AI businesses as of June 2023.
- London serves as the primary hub for AI startups in the UK, hosting companies such as DeepMind, Adbrain, and BenevolentAI. It also hosts prominent machine learning research groups at UCL, Kings, and Imperial College.

[34] Forbes UK Artificial Intelligence (AI) Statistics And Trends In 2024

AI Legal Protections: The evolution of AI impacts all events businesses, and A Manifesto for Music[35] (extract reproduced below) makes a strong case for legal protections.

The accelerating development and adoption of artificial intelligence (AI) tools brings opportunities and challenges for the sector. We are a highly innovative industry that readily embraces emerging technologies. AI is used as an assistive tool to aid the creative process and provide analytics on fan engagement and audience behaviour.

However, we must ensure that AI continues to enable human creativity rather than erode it. Many generative AI systems are being developed without regard to the rights of others and without the consent of the original creators or rightsholders.

AI's implications transcend national boundaries, and the UK should, therefore, work to ensure international cooperation. Such action will allow the UK's AI creative industries to thrive in tandem.

In early 2023, the Government rowed back on plans to allow AI developers to use copyright protected works without the permission of creators and rightsholders. These failed plans highlight the need for policymakers to engage more effectively with the creative industries on AI-related issues and to ensure damaging copyright exceptions remain off the table.

Currently, there is no legal requirement to disclose the data on which AI systems are trained. However, various regulatory AI proposals around the world, particularly in the EU and China, include requirements for record-keeping and disclosure. It is important for the UK to align with these standards and not be an outlier on this issue.

Additionally, there is a suggestion to introduce personality and image rights into the UK legal framework. AI can mimic human creativity, as evidenced by recent examples of music that unlawfully replicated the voices of Drake and Eminem.

[35] UK Music – A Manifesto for Music

The UK should work to ensure that other countries uphold similarly high standards for copyright in trade agreement negotiations. We should also consider aligning with other standards that will further strengthen our IP regime. We should introduce stronger penalties for copyright violations and ensure platforms prevent illegal content from appearing on their services.

Opportunity for Growth

To create a robust set of legal guidelines over the IP issues involved, which are easy to interpret and understood by all, to enable creators to get on with doing their work whilst not having to second guess whether they could be sued.

4.10. Sustainability

4.10.1. Sustainability has long been identified as a priority for the Events industry. In the Shape of Events to Come Report in 2020[36], this was again highlighted when survey respondents rated climate change as the primary longer-term issue for the industry (85% identified it as a challenge).

Achieving carbon neutrality is a key goal for the industry, particularly for those events with a strong international and travel element.

According to What's New in Meetings and Events 2024[37], organisations are facing increasing pressure to enhance sustainability reporting and metrics, with a growing focus on responsible practices and compliance with sustainable standards. The need for standardised reporting that encompasses diversity, equity, and inclusion aspects highlights the industry's shift towards more conscientious and sustainable event planning practices.

Climate change is forcing many in the events industry to reevaluate practices and prioritise sustainability. Contingency strategies are essential to navigate the impacts of the climate crisis on event planning and execution. Smaller-scale events, regional meetings, and non-traditional meeting spaces are gaining traction for their agility in safeguarding against environmental disruptions and reducing financial risks.

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[36] UK Events – The Shape of Events to Come 2022
[37] Skift and IMEX 'What's New in Events'

The traction mentioned by Skift and IMEX, authors of What's New in Events, is evidenced in numerous press releases and new stories that appear in the Events Industry trade publications. In fact, the Show Daily newspaper from IBTM World, the global tradeshow for event planners and event service providers, has sections focused on sustainability news, showing new sustainable developments across the globe.

4.10.2. Example: One such example of press commentary is highlighted here:

One Carbon-neutral event venue in London, has published its Sustainability Strategy

Under the venue owner's ambitions, its Sustainability Strategy is driven by five key pillars: Sustainable Venue and Events; People, Culture and Safety; Community and Platform for Change; Clients, Partners and Supply Chain; and Governance and Ethics.

These pillars were developed following an assessment in 2022, with over 600 stakeholder representatives across key groups including event organisers, exhibitors, visitors, employees, suppliers, event industry partners and its local community.

During this process, it was identified what is important to its stakeholders and how the group's performance can be further improved in the long-term.

A spokesperson said: "In our Group, our objective is to grow in an ethical and responsible way. We want to balance commercial success with positive environmental and social impacts.

To add to the mounting evidence that sustainability is being taken seriously in business events, the IACC have published their latest "The Meeting Room of the Future" Report[38], which investigated Sustainable practices offered by venues:

Of the venues surveyed, the research discovered:
88% have a programme to reduce the consumption of **Single-use plastics**
83% have a formal plan to manage **Food waste**
78% offer Environmental/sustainability certification

[38] The Meeting Room of the Future" Report

Other events are also taking action on sustainability and environmental issues, as per the two examples below (4.10.3 & 4.10.4.).

4.10.3. According to the British Air Display Association[39], (BADA) Council-financed air shows, in particular, are being scrutinized more closely by their council committee members to become carbon neutral or at least demonstrate that they are taking steps to reduce their carbon footprint.

There is no doubt that sustainability is of greater concern to the council-funded sea front sector, than other sectors of the industry, as these councils are required to declare climate emergencies and set up climate action plans in a move towards net-zero. UK-wide, air displays and other council – financed events are going to face increased scrutiny and evidence to demonstrate they are moving in the right direction.

In 2022, Eastbourne had already embarked on the journey to reduce their emissions by reducing plastics, the use of diesel generators and, most importantly encouraging use of public transport over car usage (as this is the biggest contributor to the carbon footprint of these, and indeed any other large events). In relation to the air display itself, the organisers are looking to reduce the number of display items, book local acts (to reduce transit emissions) and favour display participants already engaged with carbon offsetting schemes.

Bournemouth has been an industry leader on the drive to reduce the carbon footprint of its Air Festival. It has already produced a report identifying visitor travel choices as the main contributor to the carbon footprint of the event. Swansea have also been working with a sustainability company to change their policies to become greener across their event.

Image © Royal International Air Tattoo - Jamie Hunter – courtesy of BADA

[39] BADA Annual Review 2022

4.10.4. Sports Focus

The Value of Events research in 2022[40], evidenced that environmental sustainability issues are an increasingly high priority for most of the population. Sports can play an active and vital role in ensuring environmental sustainability is at the forefront of their minds.

As evidenced earlier, the UK is making strides in improving its environmental credentials. However, the consultation with destinations and rights holders conducted as part of the sports' report indicates that improvements in this area are not well-known internationally.

The UK could therefore improve the way in which it showcases the progress it has made in this area. Destinations commented that "the UK doesn't standout in this area" and they felt the country could do more".

The impactful environmental case study of British Rowing in Appendix 3 is a great example of work that has to be promoted more widely to help educate other people outside of the UK as to progress being made.

It is noteworthy that the majority of rightsholders, who have had direct interaction with the UK, expressed positive views about the UK's efforts in this area. Specifically, 75% of rightsholders viewed the UK as a sustainable event host, whereas only 36% of the consulted destinations shared this sentiment. Additionally, most rightsholders believe that the UK is committed to environmental sustainability, with some noting, "we feel that if we brought an event to the UK, [environmental sustainability] would be a focus."

Therefore, there is an opportunity to make destinations around the world aware of the work the UK does to help build the UK's brand in this area. During the consultations, it was recognized that environmental sustainability isn't something that has been 'conquered' and that there is a real opportunity to try and be a leader in this area.

Destinations pointed to Scandinavian countries as those that had successfully embedded sustainability into its culture and as destinations they look to learn from.

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[40] The Value of Events 2022 – UK Sport

4.10.5. Opportunity for Growth

Develop a consistent structure for messaging on sustainability and environmental issues, which is adhered to by all stakeholders, including the government and the events industry.

4.11.

4.11.1. Event Legacy

According to the November 2023 The Business of Events (TBOE) Global Destination Survey Report[41], Legacy was universally acknowledged as important, but half of the respondents felt their government did not fully appreciate its value. Furthermore, a significant portion lacked the resources to measure, monitor, or nurture business event legacy.

But before we get into discussions on what support is needed from the government, the Events Industry needs to identify what event legacy means to enable constructive conversations with the government and business.

This issue was explored in a post published by Conference and Meetings World in its May-June 2024 issue "Do we even understand the true value of event legacy?"[42]

Legacy is a term widely used in the events industry. It should be simple to explain, but depending on who you talk to, it can mean different things.

These differences can lead to misunderstandings, but they can also lead to new opportunities. What does event legacy mean to an event planner, a supplier, or a destination?

What's clear is that event legacy provides both opportunities and challenges, depending on who you are talking to. But the danger is that, without context, it could become an overused term that ultimately gets zoned out as white noise.

Event legacy is often connected to mega-events such as the FIFA World Cup.

Linda Nilsson-Aro, Head of the Hospitality Desk at IIHF Hockey World Championships 2023, believes that mega-events leave lasting effects in

[41] The Business of Events (TBOE) Global Destination Survey Report

[42] Conference and Meetings World - https://viewer.joomag.com/conference-meetings-world-issue-130-issue-130/0956067001715265868

terms of infrastructure improvements, economic development, cultural shifts, and social changes. The host cities construct stadiums, tourism infrastructure, transportation systems, and other facilities, with the expectation that these will form a legacy benefit for the city long after the event has ended.

However, she also recognises that this doesn't always happen. She says, *"After the event, some developments may not be utilised and it's critical that, at the very early stages, event legacy needs to be taken into account. Doing this makes the whole project more sustainable and brings added value for future events to come."*

Her comments align with those of Vanessa Lovatt, Strategy Consultant at Financial Times who cites the importance of taking actions to enhance an event's legacy, rather than hinder, the attraction and accessibility of a destination.

We take a look at one such mega event, The Birmingham Commonwealth Games 2022 in Appendix 3.

We learn from this case study of and its One Year Post-Games Evaluation Report published in March 2024 which sheds light on the host destination's legacy. However, it's interesting that, while legacy is mentioned throughout the report, it doesn't appear as a separate section. Possibly this is because event legacy doesn't fit neatly into a box because of the multitude of ways it can have an impact.

What is clear from the evaluation is that there are positive legacy impacts for the area and the local population.

Gail Tomlinson Short, Head of Business Development, Warwick Conferences, University of Warwick, supported this by sharing a sporting example of event legacy. She comments, *"British wrestling held their pre-Commonwealth Games training camp at Warwick and then stayed with us during the games. Fast-forward to today, and there are three new community wrestling groups in the city. These are based in areas of the city that have diverse communities. Now, to me, that's legacy; a positive impression has been left!"*

It's not just about mega-events though. Shawn Cheng, Senior Project Manager at Spark Event Collective, shares his perspective on event legacy when he says, *"I think that event legacy and legacy impact are two different things."*

In his view, event legacy is all about what the event means to the attendees and other stakeholders. Whilst legacy impact is about what happens to the host destination.

He continues, “An example of event legacy I always like to refer to is the SIGGRAPH Conference. It is an annual gathering for computer graphics and interactive technologies. This conference has been held in Vancouver, British Columbia (BC), multiple times since around 2011. It has not only created a significant economic impact on room blocks and direct spending but also inspired a whole generation of young talents in BC to get into the industry.”

The consequence is that now Vancouver is considered a hub for computer graphics and animation.

It's an interesting view. People come to events for many different reasons. If the event can continue to provide reasons for people to be at "the place to be," that is also event legacy in play. Does Cheng’s view make sense? I think it does. You only need to think of your favourite trade shows and conferences and ask yourself why you go to them year after year. It’s easy to attribute this to the event legacy that has been created in attendees.

4.11.2. Event Impacts

Representatives from Event Wales, EventScotland, Tourism Northern Ireland and UK Sport are working with Legacy Delivery and Sheffield Hallam University to update the work on https://www.eventimpacts.com/ which was launched in 2008 and last refreshed in 2016. This is used as an evaluation and reporting tool for designated cultural and sporting events across the nations.

The working group are currently in the process of developing a revamped tool which is free to use. The current update attempts to broaden its relevance to business events with the support of a working group consisting of UKEvent members and VisitBritain, with initial focus on developing an online economic tool to build intelligence on the wider economic impact of business events. There are also discussions on seeking common ground between VisitBritain’s BE Impactful Framework and the Event Impacts project to measure the wider impact of business events and alignment to the United Nations Sustainable Development Goals.

4.11.3. Ambassador Programmes

Whilst there is no overall national policy, Ambassador programmes are a key feature of devolved nations and destination management organisation activities in the UK. VisitScotland, VisitWales and individual city destination management organisations operate such programmes which focus on sectors within their area.

VisitBritain put the importance of the business events sector in the spotlight, hosting its first 'Ambassador Reception' in September 2023 at the Institute of Directors to recognise city sector and academic ambassadors who continue to secure new international business events in Britain The event brought together 50 attendees including British nations, cities, local ambassadors, industry stakeholders and representatives from the Department for Culture, Media and Sport.

British Tourist Authority Chairman Nick de Bois CBE officially opened the reception followed by a welcome from Sir John Whittingdale, Minister of State jointly in the Department for Culture, Media and Sport (DCMS) and the Department for Science, Innovation and Technology. Both highlighted the integral role and importance of ambassadors and their cities in securing new business events and the significant economic and social impact they have, not only in their priority sectors but also the regions they represent and their support in the industry's growth.

4.11.4 Opportunity for Growth

Raising awareness that all events have legacy benefits and by capitalising on understanding that, the economy and people in it grow and develop.

4.12. Advocacy

When you have a deep understanding of a subject and a strong interest in conveying its message, you effectively become an advocate or ambassador for that subject.

There is no doubt that advocacy is needed for the events Industry on an ongoing basis. Advocacy from individuals and associations talking to the government over many years has led to beneficial changes.

Advocacy plays a crucial role in securing international business events. This involves obtaining Ministerial letters of support, welcoming visiting buyer missions, and participating in important events. Government ministers should deliver keynote speeches regularly as a way of exerting soft power.

However, there is an opportunity to ensure that all Government Departments fully embrace this approach by identifying key business events that align with their policies and objectives and taking a leading role in the successful execution of these events. We look at London Tech Week 2023 as an example of this in action.

But it's not just the government that can advocate for the events industry; professionals working in the sector, university lecturers, and business leaders can do so as well. In fact, anyone with an interest in events can help. This is a significant opportunity that should not be overlooked.

However, business leaders may have reservations about spending time understanding the value of events, so let's take a look at the catalytic economic multiplier effect.

This is best summed up in the Cities Restart Report[43] – "International conferences and business events make a significant economic contribution to the UK economy, including helping to drive our city economies."

However, another important aspect of the business events sector's economic value, is the other sectors that these events help to support and make economically viable. Business events are a critical component of an interconnected economic eco-system. The hundreds of thousands of people that attend business events each year, help to support aviation, rail and other modes of transport, hotels and accommodation, restaurants, bars, retail outlets and leisure facilities.

This helps to create a 'halo' or catalytic economic multiplier effect and means that jobs are not only created in the business events sector itself by this activity, but they support many additional jobs in other industrial sectors too. This can help to aid economic diversification and fuel economic resilience.

Delegates who attend business events in our major cities contribute to the buzz and vibrancy of our city centres, helping to support the viability of many additional hospitality venues than would otherwise be economically possible.

[43] Cities Restart Report

Improving the quality of life for the people that live in those cities by enhancing their cultural and social experiences, as well as supporting thousands of extra jobs and livelihoods in the process."

While the Cities Restart report refers to international events, the same catalytic economic multiplier also impacts on domestic events. Enabling business leaders and government to understand the value both economic and social that events bring provides a major opportunity for business growth across all parts of the UK and globally. Let's look at one such example below:

Advocacy in Action with Government **-** supplied by the Events Industry Alliance. London Tech Week 2023 - The Government took a strategic view of this event and had the Prime Minister, Chancellor, Mayor of London and three other Government Ministers in attendance. Throughout the week the Government announced UK Digital Strategy, they committed a combined £743.5 million across innovative projects to secure the UK's place as a global science superpower.

The event positioned the UK as a global tech hub, in line with the ambitions of the Government and made the event extremely successful for delegates and the industry.

UKEVENTS – Policy Notes - There are **three key issues** on which we are campaigning collaboratively across the UKEVENTS Partnership:

1. **The delivery of a nationwide Event strategy** which would bring all the resources of Government together across several Whitehall Departments and agencies on a par with UKSport and the Arts Council. This would serve to achieve two prime objectives. 1) Improve the value of the offer in the UK. 2) Win more business for the UK showcasing our key industrial sectors and spreading the benefits across the Nation and extending the visitor season.
2. **Introducing tax allowances, on a par with those available in TV & Film production, which would encourage new events to be introduced in places and at times of the year when capacity is available and additional demand is needed.** Again this would stimulate growth in regions of the UK where additional content/product is needed and could be directed to times of the year when demand needs boosting.

3. **Tying in major events already held and those that the UK might bid to win in the future with Government priority industrial sectors.** These world-class events held in the UK showcase the products and services which make the UK a world leader in creative industries, science, innovation and technology and cultural arts. Development of a joined up approach with Government Departments to engage with these events will boost exports, inward investment and the UK's soft power. Together with VisitBritain, work is being done to influence the Department of Business & Trade, Department of Science, Innovation and Technology and other Departments (Health, Levelling Up) to support these events with ministerial advocacy and trade promotion.

The areas of policy we are focussing on which will stress the role and contribution of events in the UK are:

1. Why Government needs to take the UK Events Industry seriously. (A general intro to the Industry, its role, positioning, relationship with policymakers, challenges and opportunities)
2. The Industry's contribution to **Green Growth**. (Sustainability, resilience and creativity)
3. **Spreading prosperity across the UK** using events as a strategic delivery partner. (Levelling up, filling the seasonal gaps, connectivity)
4. The role of Events in **growing trade, exports and inward investment.**
5. The role of events in **community and destination prosperity.**
6. Providing the **high skilled jobs** of the future with greater ability for performers and production teams to work across boarders.
7. **Innovation and creativity. Science and technology.**
8. **Lowering barriers and incentivizing growth** (Better regulation, tax incentives for growth and investment)

UKEVENTS are also supportive of the key issues more broadly advocated in the tourism, travel and hospitality sectors.. In particular:

1. **Reduction in VAT**, especially on admission prices to festivals and consumer events.
2. **Reform of business rates.**

3. **Increased Local authority funding** for the visitor economy and for local events
4. **Easier access for overseas visitors attending events**, whether by reform of the visa system and introduction of business visit exemptions.
5. Reintroduction of **tax free shopping.**
6. **Greater funding for event marketing** within VisitBritain and additional funding from the GREAT programme for the **Business Events Growth programme.**
7. **Additional funding for development of skills** in the visitor economy to include events with **reform of the apprenticeship levy.**
8. **More competitive visa regime** with consideration for a business visit visa for event attendees.

Opportunity for Growth

Developing a communal mindset around the concept that we are all potential advocates of the benefits and value of events through sharing stories and ideas.

5. This report: a look into the future

This report has been compiled from a myriad of event industry sources. It has been prepared during a period of change, a UK general election and a change of government. The data and information is presented 'as is' at the time of writing and every effort has been made to ensure an accurate and informative current position of the UK events industry.

It is inevitable that some reports are not yet available, changes in government policy may emerge and in the fast-moving arena of technology there is the potential for emerging methods, systems, employment practices and trends in event demand. When new data becomes available this report will be updated to reflect such changes.

It will be interesting to see how new changes unfold for the events industry.

Appendix 1 – UK places

United Kingdom – VisitBritain

The British Tourist Authority (BTA), operating under the brand names VisitBritain and VisitEngland, is the national tourism agency for Great Britain. VisitBritain's purpose is to drive a thriving tourism and event industry, creating economic prosperity across Britain. They work to position Britain as a dynamic, sustainable, and inclusive destination, prioritising regional and seasonal dispersal to drive productivity across the nations and regions year-round.

Key responsibilities and activities of VisitBritain include:

1. **Marketing and Promotion:** VisitBritain works in partnership with the GREAT campaign, the national tourist boards, and other industry and non-industry partners to deliver global campaigns which inspire visitors to explore Britain now. Through their website VisitBritain.com and retail offerings from the VisitBritain Shop, VisitBritain offers visitor information, travel guides and resources to help tourists plan their trips and discover the best of what Britain has to offer.
2. **Advising Industry and Government:** VisitBritain conducts research to provide the tourism industry with the latest consumer and industry data, recent trends, and insights on domestic and inbound tourism in the UK. They also liaise with political stakeholders to inform strategic decisions and champion the value of the wider visitor economy.
3. **Travel Trade:** VisitBritain works to build relationships between British businesses and international travel trade to maximise the quality, profitability and reach of tourism programmes in Britain. They also produce resources tailored for international markets to enable travel trade partners to sell Britain better.
4. **Business Growth Resources:** VisitBritain offers resources to tourism businesses, including industry research and insights, training programmes, and opportunities for networking and collaboration.
5. **Business Events:** VisitBritain has a dedicated business events team that works in partnership with VisitScotland Business Events, Meet in Wales and MeetEngland to support business development and promotion within the business events sector, facilitating platforms and educational resources to build business pipelines,

capacity build and share best practice on important trends. The team lead on the Business Events Growth Programme, which provides funding to help cities, organisers, and venues win international events or grow attendance at confirmed events in England, Scotland, and Wales.

England – VisitEngland

VisitEngland is the official tourism board for England, responsible for developing England's visitor economy to be sustainable, resilient, and world-class. Key responsibilities and activities of VisitEngland and MeetEngland include:

1. **Working with Destinations:** VisitEngland supports the strategic development of destination organisations, striving to build strong relationships to enable productive destination management and provide strategic tools and expertise. They have reformed the structure of England's DMOs, establishing Local Visitor Economy Partnerships (LVEPs) and Destination Development Partnerships (DDPs) to simplify England's tourism landscape and provide strong local leadership and governance in tourism destinations across the country.
2. **Business Support:** The England Business Advice Hub provides research and insights, advice, resources, and training to English tourism businesses to grow and upskill the sector, especially SMEs. VisitEngland provides leadership and best practice on accessible and sustainable tourism and build digital skills to ensure England's tourism businesses are internationally competitive.
3. **Quality Assurance and Accolades:** Through the VisitEngland Quality Scheme, VisitEngland offers trusted star ratings and accreditations to tourism businesses as independent proof that they provide a consistently high calibre of service, standards, and experience; the Scheme hosts the ROSE Awards and VisitEngland Visitor Attraction Accolade, recognising excellence in the nation's accommodation and tourism products. VisitEngland also hosts the annual VisitEngland Awards for Excellence, celebrating outstanding tourism products, services, and personnel.
4. **Marketing and Promotion:** VisitEngland leads the annual English Tourism Week campaign to showcase the quality, range, and value of English tourism, highlighting the sector's valuable contribution to the UK economy. VisitEngland works to promote domestic tourism and through their website VisitEngland.com they provide visitor information, travel guides, and resources to help tourists plan their trips and discover the best of what England has to offer.

5. **Business Events:** MeetEngland is the business event brand of VisitEngland. The team works in partnership with English city convention bureaus (part of the recently established Local Economy Visitor Partnerships), providing business development platforms, activities and marketing partnerships to meet, and engage and secure new international business events for England.

Destination Marketing Organisations (DMOs)

In addition to the national and city-level DMOs in the UK, there are also regional destination organisations that focus on promoting specific regions or areas within the country. These regional organisations work to attract visitors, showcase the unique attractions and experiences of their region, and support the growth of tourism. Some, but not all have dedicated 'MICE' departments.

VisitEngland has implemented the Local Visitor Economy Partnership (LVEP) programme as part of the UK Government's response to the de Bois Review of destination management. LVEPs work in collaboration locally, regionally, and nationally on shared priorities and targets. Their mission is to support and grow the visitor economy through robust destination management, strong stakeholder relationships, and clear planning.

A list of the LVEPs is below:

1. Marketing Cheshire
2. Experience Oxfordshire
3. Cornwall and the Isles of Scilly
4. London & Partners
5. Visit Hull and East Yorkshire
6. Visit West
7. Marketing Manchester
8. Cotswolds Plus
9. Visit Peak District, Derbyshire and Derby
10. Visit Herts
11. Visit Kent
12. Visit Isle of Wight
13. Liverpool City Region
14. Cumbria Tourism
15. Birmingham, Solihull and the Black Country
16. Visit Worcestershire
17. NewcastleGateshead Initiative
18. Visit County Durham
19. Visit Northumberland
20. Coventry & Warwickshire Destination Partnership

21. South Yorkshire
22. West Yorkshire
23. Visit Essex
24. Marketing Lancashire
25. York & North Yorkshire
26. Staffordshire & Stoke-On-Trent
27. East Sussex, Brighton and Hove and West Sussex
28. Lincolnshire and Rutland
29. Leicester and Leicestershire
30. Tees Valley
31. Visit Nottinghamshire
32. Visit Herefordshire
33. Devon and partners
34. Norfolk and Suffolk

Destination Marketing Organisation Funding and Visitor Taxation

Funding of DMOs varies. Local Visitor Economy Partnerships (LVEPs) are crucial entities that help promote tourism, support local businesses, and enhance the visitor experience in a specific region. Funding for these partnerships typically comes from a variety of sources, each contributing to the overall budget and sustainability of tourism initiatives. Below are the primary sources of funding for LVEPs:

1. Government Grants and Funding:
   - National Government: In England, VisitEngland provides some funding to support tourism development. These funds might be allocated for specific projects, marketing campaigns, infrastructure improvements, or capacity building.
   - Local Government: Local councils or regional authorities often contribute to the funding of LVEPs. This can include direct financial support or in-kind contributions such as office space, staff time, or other resources.
2. Membership Fees:
   - Many LVEPs operate on a membership model where local businesses, such as hotels, restaurants, and attractions pay annual fees to be part of the partnership. In return, these businesses benefit from marketing efforts, networking opportunities, and other support services provided by the LVEP.
3. Sponsorship and Partnerships:
   - Corporate Sponsorship: Businesses and corporations may sponsor events, marketing campaigns, or specific initiatives run by the LVEP. This not only provides funding but also fosters a closer relationship between local businesses and the partnership.
   - Strategic Partnerships: Collaborations with other organisations such as local tourism networks, cultural institutions, and educational entities can bring additional resources and funding opportunities.
4. Tourism Taxes and Levies:

- Some regions implement tourism-specific taxes or levies, such as a hotel occupancy tax or a tourism improvement district (TID) assessment. The revenue generated from these taxes is often earmarked for tourism development and can be a significant funding source for LVEPs.

5. Commercial Activities:
    - LVEPs may generate revenue through various commercial activities, such as selling advertising space in brochures and on websites, organising paid events and workshops, or offering consultancy services to local businesses.
6. Grants from Foundations and NGOs:
    - Some LVEPs have successfully applied for grant funding.
    - In the past, this was often from European Regional Development and Structural Investment Funds, now replaced by the UK Shared Prosperity and Levelling Up Funds (incl. Towns Fund and Future High Streets), although these are not always open to LVEPs.
    - Some have also delivered Arts Council-funded projects such as Cultural Destinations. Many have been in receipt of grant funding from VisitEngland such as the Discover England Fund or Gateway Marketing Fund.

Five key goals of the LVEP Programme:

1. Strategy – Develop a strong national strategic relationship between LVEPs, VisitEngland, the Department for Culture, Media and Sport (DCMS) and wider government and national agencies.
2. Stability – Ensure stability and resilience through increased income generation, diversifying funding streams, robust destination management and diverse governance.
3. Growth – Join up local visitor economy growth priorities and activities with those at national level, setting clear targets and driving high performance. There will be a strong emphasis on sustainability and accessibility, growing business support, and working on approaches to data.
4. Place-shaping – Provide a significant role in place shaping and economic development, generating better outcomes for visitors, the environment, communities and businesses, through building influential relationships with local government and businesses.
5. Training – Develop skills and expertise in LVEP teams through access to training opportunities, and the wider sector and SMEs through a more targeted business support offer.

VisitBritain Business Events Growth Programme

The Business Events Growth Programme forms part of the UK Government's commitment to growing the business events sector across Britain in priority sectors such as medical, healthcare, life science, advanced manufacturing, creative services, technology and energy. It is an effective tool to help cities win new events, and to provide tactical support to grow high-spend attendance at confirmed events across England, Scotland, and Wales.

The two funding pillars include:

- Candidate City Bid Support – funding to support British cities bidding for new international business association events
- International Delegate Growth – funding to grow or internationalise association or corporate trade show events in Britain, and to increase attendance among high-spend international delegates.

During 2018-2023, the Business Events Growth Programme supported 62 potential or confirmed business events in 19 cities across Britain, delivering an ROI of 33:1 and £45.5m in direct economic return. Examples of events supported during this period include:

- UK Real Estate Investment & Infrastructure Forum 2023 in Leeds
- Blue Earth Summit 2023 in Bristol
- International Society for the Prevention of Child Abuse and Neglect 2023 in Edinburgh
- European Congress of Clinical Neurophysiology 2025 in London
- World Water Congress & Exhibition 2026 in Glasgow
- Intelligent Transport Systems World Congress 2027 in Birmingham

Shape the Future of Events: VisitBritain's Business Events Legacy and Impact course

Since 2022, VisitBritain Business Events has executed the "Shape the Future of Events" programme, a comprehensive series of actions to upskill and support British convention bureaus with the implementation of broader positive impact and sustainability strategies when working with clients to host business events.

This programme has included the publication of the VisitBritain Business Events Legacy and Impact toolkit, providing convention bureaus with a comprehensive step-by-step guide on understanding legacy and impact, what is required to undertake a legacy or impact project, and how to maximise the value of the project for your destination, congresses and events, for destination stakeholders, and for the wider community. This was followed by a five-part workshop series to British destinations, large venues and professional congress organisers to increase their capacity to further their sustainability and impact goals, working in partnership with #MEET4IMPACT and GDS Movement. The series explained #Meet4Impact's methodology in detail, explaining impact theory and sharing best practices for destinations to embed impact and legacy into their event offer, whilst deepening sustainability into destination strategies when hosting business events.

In 2024 VisitBritain will launch the Business Events Impactful Framework. Developed in collaboration with #MEET4IMPACT, this document will set out a framework to help set objectives and integrate positive impact strategies into event planning. The Impactful Framework identifies eight capitals around which to frame objectives: Natural, Built, Social, Human, Intellectual, Cultural, Financial, and Political, and will incorporate research and industry feedback to support the practical guidance it lays out.

Northern Ireland

The Northern Ireland Tourist Board (NITB) was the former official tourism board for Northern Ireland, responsible for promoting tourism, developing visitor experiences, and showcasing the region's attractions to domestic and international visitors. In 2015, the Northern Ireland Tourist Board was restructured and replaced by Tourism Northern Ireland.
Key functions and responsibilities of the Northern Ireland Tourist Board included:
1. Destination Marketing: The NITB promoted Northern Ireland as a tourism destination through marketing campaigns, advertising, digital initiatives, and partnerships with travel trade and media.
2. Visitor Information: The board provided visitor information, travel guides, and resources to help tourists plan their trips and discover the best of what Northern Ireland has to offer.
3. Quality Assurance: The NITB offered quality assessments and accreditations for accommodation providers, attractions, and tourism businesses to ensure high standards and enhance the visitor experience.
4. Product Development: The board worked to develop and enhance tourism products and experiences in Northern Ireland, collaborating with local businesses and organisations to create compelling visitor offerings.

5. Industry Support: The NITB provided support and resources to tourism businesses, including market intelligence, training programs, and opportunities for networking and collaboration.

While the Northern Ireland Tourist Board no longer exists in its previous form, the work of promoting and developing tourism in Northern Ireland continues under the auspices of Tourism Northern Ireland, which focuses on driving growth and innovation in the tourism industry in the region.

Scotland

VisitScotland is the national tourism organisation for Scotland, responsible for promoting Scotland as a travel destination to both domestic and international visitors. VisitScotland works to showcase the country's diverse attractions, cultural heritage, natural landscapes, and experiences, and to support the growth of the tourism industry in Scotland.

Key responsibilities and activities of VisitScotland include:

1. Marketing and Promotion: VisitScotland runs campaigns and marketing initiatives to promote Scotland as a tourism destination. This includes advertising, digital marketing, social media campaigns, and partnerships with travel trade and media.

2. Visitor Information: VisitScotland provides visitor information, travel guides, maps, and resources to help tourists plan their trips and discover the best of what Scotland has to offer.

3. Quality Assurance: VisitScotland offers quality assessments and accreditations for accommodation providers, attractions, and tourism businesses to ensure high standards and enhance the visitor experience.

4. Product Development: VisitScotland works to develop and enhance tourism products and experiences in Scotland, collaborating with local businesses and organisations to create compelling visitor offerings.

5. Research and Insights: VisitScotland conducts research to understand visitor trends, preferences, and behaviours, providing valuable insights to the tourism industry and informing marketing strategies.

Through its efforts, VisitScotland aims to showcase Scotland's rich history, cultural diversity, stunning landscapes, vibrant cities, and world-class attractions to visitors from around the globe, contributing to the economic growth and cultural enrichment of the country.

Wales

VisitWales is the official tourism board for Wales, responsible for promoting Wales as a travel destination to both domestic and international visitors. VisitWales works to showcase the country's diverse attractions, cultural heritage, natural landscapes, and experiences, and to support the growth of the tourism industry in Wales.
Key responsibilities and activities of VisitWales include:

1. Marketing and Promotion: VisitWales runs campaigns and marketing initiatives to promote Wales as a tourism destination. This includes advertising, digital marketing, social media campaigns, and partnerships with travel trade and media.

2. Visitor Information: VisitWales provides visitor information, travel guides, maps, and resources to help tourists plan their trips and discover the best of what Wales has to offer.

3. Quality Assurance: VisitWales offers quality assessments and accreditations for accommodation providers, attractions, and tourism businesses to ensure high standards and enhance the visitor experience.

4. Product Development: VisitWales works to develop and enhance tourism products and experiences in Wales, collaborating with local businesses and organisations to create compelling visitor offerings.

5. Research and Insights: VisitWales conducts research to understand visitor trends, preferences, and behaviours, providing valuable insights to the tourism industry and informing marketing strategies.

Through its efforts, VisitWales aims to showcase Wales's rich history, cultural heritage, stunning landscapes, outdoor adventures, and unique attractions to visitors from around the world, contributing to the economic growth and cultural enrichment of the country.

Core Cities

The Core Cities Group is a collaboration of the largest city-regions outside of London in the UK. The group consists of 11 major cities: Birmingham, Bristol, Cardiff, Glasgow, Leeds, Liverpool, Manchester, Newcastle, Nottingham, Sheffield, and Southampton. These cities are considered to be the economic powerhouses of their respective regions and play a significant role in driving growth, innovation, and development in the UK.

The Core Cities Group aims to promote the interests and priorities of its member cities, advocating for greater devolution of powers and resources from the central government to local authorities. The group works together to address common challenges, share best practices, and collaborate on initiatives that benefit the cities and their residents.

Key areas of focus for the Core Cities Group include:

1. Economic Development: The group works to promote economic growth, attract investment, and create job opportunities in the member cities. This includes supporting innovation, entrepreneurship, and infrastructure development.

2. Transport and Connectivity: The Core Cities Group advocates for improved transportation links and connectivity within and between the member cities, as well as with other regions in the UK. This includes investments in public transport, road networks, and rail connections.

3. Skills and Education: The group works to ensure that residents of the member cities have access to high-quality education and training opportunities that align with the needs of the local labor market. This includes promoting skills development and lifelong learning.

4. Sustainability and Environment: The Core Cities Group is committed to promoting sustainability, resilience, and environmental protection in the member cities. This includes initiatives to reduce carbon emissions, improve air quality, and enhance green spaces.

5. Culture and Tourism: The group promotes the cultural heritage, attractions, and events of the member cities to attract visitors and support the tourism industry. This includes showcasing the arts, music, history, and diverse cultural offerings of each city.

Overall, the Core Cities Group plays a crucial role in advocating for the interests of the largest city-regions in the UK, driving economic growth, and enhancing the quality of life for residents. By working together, the member cities can leverage their collective strengths and resources to address common challenges and seize opportunities for growth and development.

Appendix 2 – the UKEVENTS partnership

All the organisations listed below are partners of UKEVENTS. Partners are listed in alphabetical order. Click on the links to go direct to their websites.

- Association of British Professional Conference Organisers (ABPCO) – www.abpco.org
- Association for Events Management Education (AEME) – www.aeme.org
- beam – Business Meetings, Accommodation, Meetings. https://beam-org.uk
- Business Travel Association (BTA) – www.thebta.org.uk
- British Airshow Display Association (BADA) – www.bada-uk.com
- 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
- International Congress and Convention Association (ICCA) – www.iccaworld.org
- London & Partners – www.conventionbureau.london
- Meetings Industry Association - www.mia-uk.org
- NCASS - The Nationwide Caterers Association - www.ncass.org.uk
- National Outdoor Events Association (NOEA) – www.noea.org.uk
- PLASA - www.plasa.org
- Production Services Association (PSA) – www.psa.org.uk
- Tourism Northern Ireland – www.tourismni.com
- UVL - Unique Venues of London - https://www.uniquevenuesoflondon.co.uk
- Visit Wales – www.visitwales.com/businessevents
- VisitBritain & Meet England - www.visitbritain.org - 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
- The Tourism Industry Council (TIC) is an industry-led board composed of employers and small businesses and representative organisations from across the visitor economy. The council acts as a sounding board and point of dialogue between ministers and industry, providing a forum for the sector to advise the government on issues affecting tourism. The council aims to bring this broad and varied industry together to speak with one unified voice, identifying the strategic priorities of the sector, supporting the implementation of the Tourism Recovery Plan and ensuring the visitor economy meets its full potential.
- The Events Industry Board Working Group (EIBWG) - advises on the challenges and opportunities for business visits and events in the UK. (The group is a sub-group of the Tourism Industry Council and which super-ceded an earlier Events Industry Board.) It is chaired by Chris Skeith OBE, Director of the Events Industry Alliance and Chair of UK Events.
- Department for Business and Trade

  The department for economic growth. Supports businesses to invest, grow and export, creating jobs and opportunities across the country.

  Future arrangements may change following the 2024 general election.
- All-Party Parliamentary Group for Events

  Founded in 2011 by Davis Tanner, 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. Davis Tanner remain secretariat for the group. For further information please email: appg@daviestanner.com

Appendix 3 – case studies

1. The Birmingham Commonwealth Games 2022

The Legacy Plan for the Birmingham 2022 Games set out the vision of the Games partners to deliver 'the Games for Everyone', promoting equality, diversity and inclusion across the UK and celebrating the diversity of Birmingham.

The participation data shows that individuals from a cross section of the Birmingham and wider West Midlands population were engaged with the Games.

There is evidence that the Games helped to both bring people together and generate positive impacts on community cohesion and civic pride; this was particularly the case for those individuals who participated in the delivery of the Games and Legacy Programmes.

In support of helping the region to grow and succeed and the Games being a catalyst for change in the region, this one year post-Games evaluation indicates that the activity delivered through the Games events and Legacy Programmes generated a breadth of economic and social impacts in the lead up to the Games, during the Games-time period and in the year since.

There is already some evidence that there are likely to be some ongoing, sustained economic and social impacts, not yet fully realised, including as a result of increased tourism, trade and investment, through improved employment prospects as a result of skills and training provision and through use of the new sports facilities.

The actual realisation of such impacts will need to be monitored over time to assess the longer-term legacy of the Games.

Beyond monetised impacts, positive outcomes have been generated through the Legacy Programmes linked to each of the Mission Pillars. For example, the majority of young people that participated in the OC Volunteering Programme and the Jobs and Skills Academy reported gaining new skills and confidence and there is already evidence, obtained through the surveys conducted as part of the evaluation, of some positive impact of the Games on opportunities for, and levels of participation in, skills, employment or volunteering opportunities among volunteers and young Birmingham residents more broadly. Similarly, evidence from a number of the Physical Activity and Wellbeing Programmes, such as provision of Games equipment to 290 West Midlands organisations, 70 Active Street Festivals, and TfWM's Cycling for Everyone programme, indicates that these contributed to removing community barriers to be active and helped to improve levels of participant physical activity.

Further benefits are expected to be generated through the legacy left by the Games, including the significant infrastructure investments supporting regeneration in Perry Barr, and the development of the Sandwell Aquatics Centre and Alexander Stadium (which were designed for future use as both community venues and for other major events). The relationships with travel trade professionals, conference organisers and investment intermediaries generated through the BATP, improved systems and services to support physical activity participation, investment in the cultural sector, and the policies and standards in terms of sustainability and EDI that can be adopted by future events also have potential future legacy benefits.

Evidence suggests that some of the longer-term benefits from major sporting events can accrue many years after the event takes place. This is particularly the case with benefits that are dependent on significant behavioral change, for example changes in the perception of a destination for visitors. Likewise, based on the experience of previous major sporting events, a full picture of investment and trade impacts may not emerge until three to five years post-Games. This is expected to be the case for the Birmingham 2022 Games and therefore the one-year post-Games evaluation does not present the full scale of its potential impact.

A further evaluation, in due course, would enable a longer-term assessment of the impact and lasting legacy to be obtained, including providing evidence of any sustained and enhanced economic and social impacts on the city and region, for example from regeneration, tourism, trade and investment, and health and wellbeing related investments.

As well as assessing the impact of the Games, the evaluation also highlights a number of **lessons learned** from the delivery of the Games and Legacy Programmes, largely identified through feedback from stakeholders consulted with as part of the evaluation. These can usefully inform future event planning.

The need for detailed legacy planning ahead of investments being made, and ongoing activity that builds on the positive momentum that the Games has created in the region, was acknowledged by some stakeholders as important for sustaining positive impacts and enhancing these going forward.

To optimise the legacy of major events, legacy programme funding needs to be built in the budget from the start and that upfront funding can support stakeholders' ability to leverage further investment. Some stakeholders noted that upfront allocations of funding to specific Legacy Programmes would have been beneficial and this was a suggestion for future Games or major events hosts.

In terms of continuing the legacy going forward, one stakeholder noted the importance of factoring in team resourcing in the period post-Games, to support knowledge transfer and transition to covering legacy delivery as part of business as usual.

Planning venues with future community and wider use in mind is important. The design of the Sandwell Aquatics and redevelopment of the Alexander Stadium were intended to enable this. Although the venues have only recently opened for public use, there are early indications of positive benefits coming from this for local citizens.

In relation to setting a benchmark for future Games, it was noted that by setting ambitious targets, Birmingham 2022 has created a legacy in terms of environmental sustainability, social value, and diversity and inclusion, delivering new approaches that can be adopted for other major events. These include: being the first ever Commonwealth Games with a Social Value Charter; the intention of being the first ever Commonwealth Games to deliver carbon neutral legacy; and the development of the Birmingham 2022 Inclusive Games Standard.

However, the evaluation has not identified evidence to date of these being adopted elsewhere which, notwithstanding the lead times for major events that could result in a lag in adoption, may suggest that more proactive engagement with prospective event hosts is needed to fully realise the longer-term benefits of this legacy.

Overall, stakeholders interviewed as part of the evaluation considered the Birmingham 2022 Games to have been a success and this evaluation provides evidence of positive impacts in a number of areas. While there are some lessons to be learned and areas where the intended impacts, particularly for the wider populations of Birmingham and West Midlands (beyond attendees and programme participants) have not yet been observed, at only one-year post-Games there are indications of the potential for ongoing legacy benefits as a result of the programmes and infrastructure delivered. The Games has also already supported short-term economic growth and employment at a time of particularly challenging economic circumstances.

2. Sustainability Case Study – 2022 World Rowing Coastal Championships and Beach Spring Finals[44]

Major sporting events hosted in 2022 showcased the UK's commitment to delivering a sustainable future for sport.

Analysis has focused on exploring the event delivery plans for the 2022 World Rowing Coastal Championships and Beach Spring Finals.

The 2022 edition, held in Saundersfoot, Wales, became the first-ever rowing event of its type to achieve ISO (International Organization for Standardisation) certification in sustainable events ISO20121.

The event ensured that sustainability was embedded in event delivery by creating an event management system to:

- Identify the environmental, economic, and social impacts of the event
- Implement measures and practices to monitor and reduce such impacts
- Engage event stakeholders and local communities on the importance of sustainability for the overall event and for British Rowing.

Evidence was provided on managing risks and identifying opportunities (e.g., marketing for local businesses and supply chains). KPIs were developed for four areas, supported by associated actions that are continuously monitored to show compliance with the ISO standard.

- Responsible use of resources
- Participation and reach
- Protecting people and the planet
- Operation and ethos.

Following the successful delivery of the event in October 2022, a full evaluation of KPIs and the event as a whole will be conducted to produce a report. The learnings from this event will be embedded in future world rowing events– thereby helping other organisations and events improve their own sustainable objectives.

[44] The Value of Events 2022

The recognition of this event to such a Standard is significant and there is now an opportunity for other major sporting events to build on these standards.

Notable achievements include:

Supporting charitable causes for wildlife. The event engaged with the World Wildlife Fund and Pembrokeshire National Partnership to raise funds for two marine-focused environmental projects in Africa and Wales. At the centre of the event was an environmental hub that highlighted the importance of sustainability and how we collectively look after the natural world.

• Involvement of Welsh universities. To ensure that learning about sustainability continues after the event finishes, the organisers ensured that knowledge would be shared with other stakeholders and a positive legacy. This took the form of training the Wavemaker Volunteers on sustainability and offering a project to 3rd year BSc students from Swansea University to develop tools to monitor and evaluate the impact of the ISO Standard.

• Procurement code. The event is underpinned by a code that seeks to address resource efficiency, corporate responsibility, and environmental stewardship across all aspects of the event. Importance has been placed on ensuring partnerships were only made with responsible suppliers and contractors who treat and understand their products and materials and demonstrate their responsibility to protect the environment and foster good relations with their local communities.

3. Unearthing Insights into Attendee Experience

Dr Lee Parry, a biosciences lecturer at Cardiff University talks about the unseen power of conferences and why he was in Barcelona to support Meet In Wales as an ambassador for bringing major scientific congresses to the Welsh capital. Interviewed on the show floor in Barcelona[46] Dr Lee Perry is a lecturer at Cardiff University and researcher at the European Cancer stem cell research Institute. He was in Barcelona IBTM World on behalf of meet Wales, he's one of their ambassadors and he was keen to talk about the cultural benefits of conferences, especially on things like scientific discovery.

[46] iBTM World Podcast November 2023

"It was something I was happy to do when Meet In Wales approached me to be an ambassador for large conferences to Wales. Obviously we've all been to conferences where we are more than happy to go online and the benefits of less travelling and more time-saving but you certainly don't get the benefits of connections and the networking that happens spontaneously around lectures and social events.

"You don't get that same serendipity online. At a conference you can get away from your job and you get to catch up with people who are not talking to you, people you may have known in the past and new people. You discuss the things you have heard at the sessions in the classic Friday afternoon conversations about what we did and we do that all the time.

"I was looking into cancer prevention and part of that was at a conference I attended. So, I was at Conference and it was the last day and it was the morning after the conference dinner so I was in the usual state that you are in during the morning after the conference event and there was a session on cancer immunology, but at the time it was not something I was particularly knowledgeable about or interested in but you turn up at these things and you learn something every time you go.

"At the time I was working on this project looking at the potential target for cancer therapy and obviously I read around my subject and one aspect of it was around cancer immunology. During that talk one of the speakers said one thing which made me think that I really should look a bit closer at that when I go home as that might potentially explain some of the problems I'm facing at the moment. Sure enough, I went home, did some reading and thought I'm onto something here and then a couple of years later that turned into a publication and put me on the path where I am today.

"Probably quite a lot that goes on and we just don't realise that when you are in these kind of conferences and exhibitions. Yes, it's hard to measure that sort of impact because nobody documents that sort of thing, they are all anecdotal conversations with someone you've bumped into. The power of in person events is one that will never go away because we like to talk, we like to know what's going on. It just comes back to that time and space to listen to people and just to have a dedicated space in your day. I don't know if it's true for everybody but when you sign up to online conferences you sit in your office, you get interrupted, the door gets knocked.

"You can ask questions at the end but you don't have a conversation with people, it's just a very sterile way of interacting with people. To get conferences up and running again is a major part of science which is all about collaboration and communication. I'm a life scientist but I use microscopes and tools in the laboratory but they weren't build by scientists but by physicists and we all come together at conferences."

Appendix 4 – references and links

The UFI Global Exhibition Barometer

Launched as a response to the 2008 global financial crisis. Since then, it has tracked industry development through various external shocks (the most recent one being the COVID-19 pandemic), and several data sets refer to the year 2019, which represents the best year for the industry before the pandemic. As a globally trusted, independently run research project, this latest edition again identifies and lists today's and tomorrow's industry challenges.

Business of Events – International Planner Sentiment Report

An audience comprising corporate, association and agency planners were surveyed over a two-week period during the May 2023. The questions were focused on those areas which planners considered to be important when selecting a destination or major venue in the current environment.

What's New in Events

Skift and IMEX

For Cvent Top Meeting Destinations, Cvent evaluated 12,500+ cities worldwide listed on the Cvent Supplier Network. Activity was tracked between January 2023 and December 2023. Rankings were determined by a set of qualifying criteria, including: the number of total room nights booked; the number of unique electronic request-for-proposals (RFPs) sent through the marketplace to venues within the city; the total value of the RFPs submitted; and the actual awarded value for meetings booked.

About the Cvent Supplier Network

The Cvent Supplier Network features more than 300,000 hotels, resorts and special event venues, serving as one of the world's largest and most accurate databases of detailed venue information. More than $16 billion was sourced through Cvent's sourcing networks in 2023. The CSN contains listings of hotels and other venues in 18 languages that can be searched and filtered based on over 200 characteristics and criteria. The CSN is part of the comprehensive Cvent platform, which delivers solutions that hotels and venues leverage to conduct their group and corporate travel business and engage a global network of 125,000+ planners who rely on Cvent to source hotels & destinations and manage their events.

Incentive Research Foundation

The IRF provides research and education to the professionals who run incentive programs, the suppliers who make those programs successful, and the industry that focuses on motivating the workforce to perform at their best.

Travel and Tourism Competitiveness

https://www.sta.gov.sa/ar/news/expo-2030

https://exhibitionworld.co.uk/fira-de-barcelona-signs-agreement-to-develop-events-at-circuits-de-catalunya

https://exhibitionworld.co.uk/dmg-events-and-koelnmesse-sign-mou-on-middle-east-shows

https://ocec.om/News/Detail/147

https://press.accor.com/greater-china/the-first-mondrian-in-greater-china-is-now-open-offering-hospitality-with-art-and-soul-inspired-by-people/?lang=en

https://www.undercovertourist.com/blog/universal-epic-universe-hotels/

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Footnotes

	Name of Report	Notes	Location
1	Plasa Global Report 2022	Reference to employment levels	Chapter 2.1 Situation Analysis
2	EIA 2022 Economic Impact of Exhibitions in the UK	Reference to employment levels	Chapter 2.1 Situation Analysis
3	Mustard Jobs Salary Guide 2023	Reference to employment levels	Chapter 2.1 Situation Analysis
4	The Annual Event Industry Salary Survey 2024	Reference to salaries and working from home flexibility	Chapter 2.1 Situation Analysis
5	ICCA International Sustainability Report 24	Reference to attitudes to sustainability	Chapter 2.1 Situation Analysis
6	UK Conference and Meetings Survey	Reference to conference and meetings total spend	Chapter 2.1 Situation Analysis
7	Cities Restart Report: The Importance of Restarting International Conferences & Business Events to City Economies	Reference to conference and meetings total spend	Chapter 2.2 Value and Volume of events
8	International Passenger Survey	Reference to International MICE volumes and spend	Chapter 2.2 Value and Volume of events
9	The Value of Events - UK Sport	Reference to events value and total spend	Chapter 2.2 Value and Volume of events
10	Birmingham Commonwealth Games 2022 Evaluation	Reference to events value and total spend	Chapter 2.2 Value and Volume of events
11	The Size and Scale Index for Exhibitions (SASIE) 2023	Reference to growing trade, exports and inward investment	Chapter 2.2 Value and Volume of events

12	30th UFI Economic Impact of Exhibitions in the UK	Reference to value and volumes of exhibitions and trade fairs	Chapter 2.2 Value and Volume of events
13	UK Music This is Music 2023	Reference to value of music industry events	Chapter 2.2 Value and Volume of events
14	UK Music Here, There and Everywhere Report 2023	Reference to value of music industry events	Chapter 2.2 Value and Volume of events
15	British Air Display Association (BADA)	Reference to Outdoor Events	Chapter 2.2 Value and Volume of events
16	2023 Incentive Travel Index	Reference to Incentive travel volumes and values	Chapter 2.2 Value and Volume of Events
17	Business Travel Show Europe	Reference to Business Travel Planners Responsibility for Meetings and Events	Chapter 2.2 Value and Volume of events
18	Global Business Travel Association 2023 Business Travel Index Outlook	Reference to UK's 5th Position in Business Travel Value	Chapter 2.2 Value and Volume of events
19	ICCA Country and City Rankings for the year 2023.	Reference to UK's Position in ICCA's Global Events report	Chapter 2.3 Global Significance of Events
20	STR/CoStar Group	Reference to events impact on hotel Occupancy and ADR	Chapter 2.4 Impact of Major Events on Hotel Performance
21	ICCA Country and City Rankings for the year 2023.	Reference UK's Position in ICCA's Global Events Report	Chapter 3.2 ICCA Country and City Rankings
22	World Economic Forum's Travel & Tourism Development Index	Reference to Travel & Tourism Competitiveness	Chapter 3.3 Travel & Tourism Competitiveness
23	Cvent Top Meeting Destination Report	Reference to Cvent Top Meeting Destination Report	Chapter 3.4 The Global Events Landscape

24	Incentive Research Foundation (IRF) and Society for Incentive Travel Excellence (SITE), the Incentive Travel Index (ITI)	Reference to Incentive Travel	Chapter 3.5 The Global Events Landscape
25	UFI Global Exhibition Barometer	Reference to Global Exhibitions	Chapter 3.6 The Global Events Landscape
26	The Business of Events (TBOE) Global Destinations Report	Reference to Global Destinations	Chapter 3.7 The Global Events Landscape
27	The Business of Events 2023 International Planner Sentiment Report	Reference to International Sentiment	Chapter 3.8 International Planner Sentiment
28	IBTM World Trends Report 2023	Reference to Regions of the World	Chapter 3.9 Regions of the World
29	Meetings Industry Association https://www.mia-uk.org/Insight-Surveys	Reference to People Skills Talent	Chapter 4.2 Future Challenges and Opportunities
30	The UK Events Report 2020	Reference to Attracting Talent	Chapter 4.3 Future Challenges and Opportunities
31	The Future of Work Report from the IBTM World Trends Report	Reference to Attracting Talent	Chapter 4.3 Future Challenges and Opportunities
32	Upwork Research Institute – from Skift and IMEX 'What's New in Events'	Reference to Attracting Talent	Chapter 4.3 Future Challenges and Opportunities
33	The Annual Events Industry Salary Survey	Reference to Attracting Talent	Chapter 4.3 Future Challenges and Opportunities
34	Forbes UK Artificial Intelligence (AI) Statistics And Trends In 2024	Reference to AI Adoption and Growth	Chapter 4.9 AI Adoption and Growth in the UK

35	UK Music – A Manifesto for Music	Reference to AI Adoption and Growth	Chapter 4.9 AI Adoption and Growth in the UK
36	UK Events – The Shape of Events to Come 2022	Reference to Sustainability	Chapter 4.10 - Sustainability
37	Skift and IMEX 'What's New in Events'	Reference to Sustainability	Chapter 4.10 - Sustainability
38	The Meeting Room of the Future" Report	Reference to Sustainability	Chapter 4.10 - Sustainability
39	BADA Annual Review 2022	Reference to Air Displays and Sustainability	Chapter 4.10 - Sustainability
40	The Value of Events 2022 – UK Sport	Reference to Sports Focus	
41	The Business of Events (TBOE) Global Destination Survey Report	Reference to Event Legacy	Chapter 4.11 Event Legacy
42	Conference and Meetings World	Reference to Event Legacy	
43	Cities Restart Report	Reference to Advocacy	

Acknowledgements

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The supporting summarised version was put together by Martin Fullard, Director, The Business of Events and Davies Tanner and Vice Chair of UKEVENTS.

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