



**mia**

meetings industry association

## Social Distancing Survey

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1 May 2020

# BACKGROUND

For 30 years the Meetings Industry Association (mia) has represented business meeting, seminar, conference and events venues alongside specialist sector-specific audio-visual suppliers, production houses and agencies, professional event organisers and equipment hire providers.

Our 800+ venue members feature an extensive range including residential and non-residential conference centres, hotels with events space, large national exhibition spaces, independents as well as corporate groups featuring a number of properties.

Together it is estimated that mia members employ in the region of 280,000 people who are not only crucial to the local economy throughout the UK but, are also economic and income generators for other sectors and essentially hubs for core business activity.

The sector has been knocked off its feet and ultimately decimated by the impacts of COVID-19. However, being a resilient and adaptable industry, we are ready and eager to come back in order to support the economy and protect jobs as soon as the UK government asks us to do so.

We know that adaptability will be the key to ensure the sector is able to re-start operations. Our members are already preparing for an immediate future that will include social distancing. Venues are adapting their business models to offer reduced capacity, increasing their already extensive cleaning and hygiene routines and considering the effects of reduced business levels on their requirement for 100% staffing.

Following an urgent request on 28 April 2020 to provide information to DCMS, a survey was prepared to ask our members to consider the effects of social distancing on their businesses.

The findings of the survey, which received 186 responses from venue operators employing a minimum of 11,986 people, potentially represents upwards of over 17,275 employees.

Similarly, if we take into account that the number of operators employing over 200+ people (16%) are likely to be groups featuring a number of properties, the data is likely to reflect responses from 918 venues.

# EXECUTIVE SUMMARY

The majority (82%) of venues confirmed they can operate with social distancing measures in place. In reality, nearly half (46%) of respondents identified that their venue's capacity would have to be more than halved, with 27% highlighting a reduction of between 41-50% would be required. As a result of these reduced capacities, 59% of venues would not break even and over 80% expect to lose more than half of their turnover per month, so the sector will require continued government support.

It is imperative that there is a phased reduction and extension of the government's furlough scheme. Without it, 38% of our venues reported that more than half of their workforce will be made redundant if the scheme is not extended beyond 30 June 2020.

From our 186 responses alone, analysis of the data shows there would be approximately 1,953 redundancies of both skilled and unskilled workers. Applying this formula to the 800 mia member venues, we can expect to see 8,402 job losses.

Organised events such as conferences, exhibitions and business meetings that all have a specific purpose should not fall under the World Health Organisation's ambiguous term of 'mass gatherings'.

Unlike larger unorganised gatherings, we can put multiple measures in place to manage the flow and track and trace the attendees in our venues, for example, while ensuring that public health requirements are adhered to. Without a distinction being made between 'mass gatherings' and 'organised events', our recovery will be significantly affected when the lockdown restrictions are eased.

"PLEASE CONSIDER THE LOSS OF JOBS, ALSO SETTING LIMITS THAT ARE REALISTIC TO EACH INDIVIDUAL VENUE NOT A ONE RULE FOR ALL APPROACH, FOR EXAMPLE. WE ARE A LARGE SPACE AND THEREFORE CAN SPREAD OVER TWO FLOORS AND MANAGE SAFE DISTANCES EVEN WITH LARGER CAPACITIES."

"FURLOUGH HAS BEEN A LIFELINE, THANK YOU. WE NOW NEED THIS EXTENDING UNTIL THE END OF THE YEAR. THE CASH WE CLAIM WILL DROP EACH MONTH AS WE BRING MORE AND MORE OF THE TEAM BACK TO WORK AS WE REBUILD UP TO BREAK EVEN LEVELS."

"PLEASE CONSIDER FURLOUGH FOR A LONGER PERIOD FOR THIS SECTOR, THE PREDICTED SELF-DISTANCING RESTRICTIONS WILL BE IN PLACE FOR SOME TIME AND WE ARE KEEN TO RETAIN OUR GOOD STAFF AND BE ABLE TO OFFER THEM A FUTURE."

"WE NEED TO KNOW IF THE 2-METRE IN ALL DIRECTIONS SEPARATION WOULD BE A SENSIBLE LAYOUT FOR MEETINGS. THIS WOULD REDUCE OUR ROOM CAPACITIES BY AROUND 75%."

But we need time to prepare. There is also huge emphasis being placed on the need for clear guidance. The speed in which we can return – recall and retrain furloughed staff as well as restart the supply chain – is vastly increased if notice is provided. Just 12% of venues would be able to open immediately, while 47% would require up to two weeks lead time, 29% between two and four weeks and 12% over a month.

As the holders of AIM – the UK’s only national venue accreditation scheme – the mia can work with the government to ensure that all public health measures are embedded into the legal compliance criteria to be adhered to.

Crucially, the government needs to put in place a public confidence campaign to support the sector. As we slowly come out of lockdown, it is imperative that clear measures are put in place to initially allow the industry to build buyer confidence with smaller meetings, seminars and training, to demonstrate how amazing events can still happen even in an environment of social distancing.



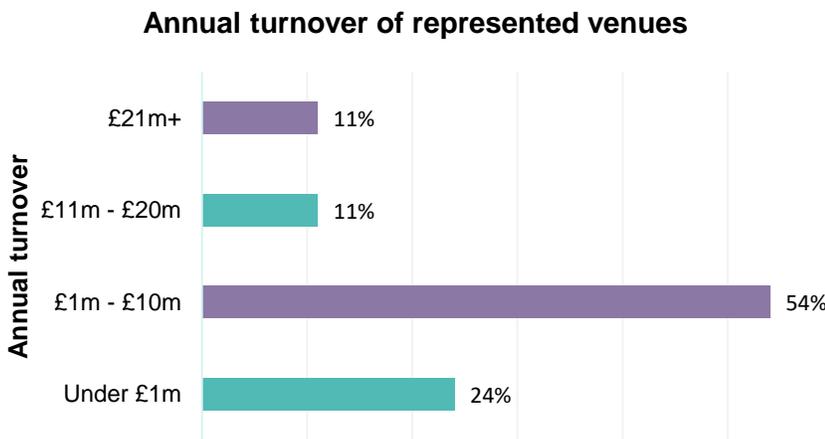
“MY BIGGEST CONCERN IS THAT WE WILL RUN OUT OF MONEY BEFORE EVENTS START HAPPENING AGAIN, WHICH LOOKS LIKE SEPTEMBER AT THE VERY EARLIEST, MEANING WE WILL NOT RECEIVE ANY EVENT MONEY UNTIL AT LEAST OCTOBER.”



“PLEASE BE TRANSPARENT ABOUT YOUR PLAN. EVEN IF A LOCKDOWN IS STILL REQUIRED, PLEASE SHARE THE PLAN FOR RE-OPENING SO THAT WE CAN PLAN EFFECTIVELY. BY NOT SHARING YOUR PLAN, CUSTOMERS ARE CANCELLING AND IT MAY NOT BE NECESSARY FOR THEM TO DO SO.”

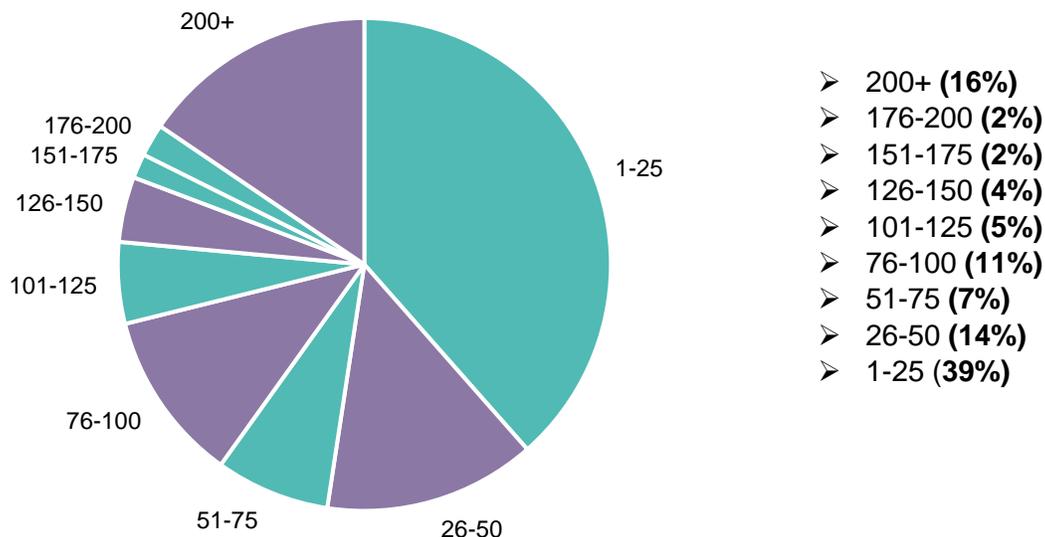
# PROFILING

When evaluating the profiles of respondents, a majority (**54%**) represent venues with an annual turnover between £1m and £10m, with **24%** representing venues with turnover less than £1m, **11%** between £11m and £20m and **11%** greater than £21m.



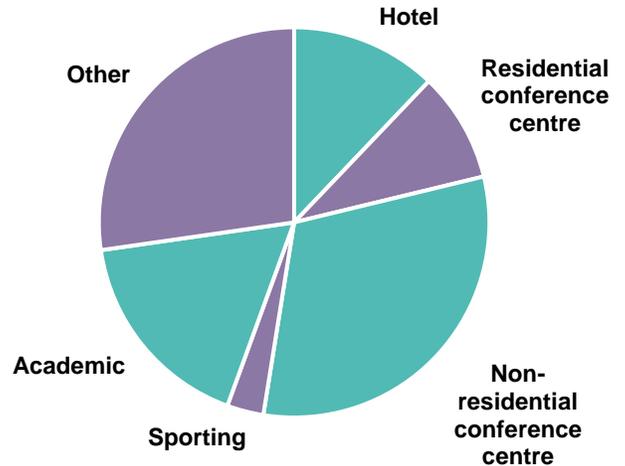
**14.5%** of respondents highlight that the venue they operate employs more than 200, while **39%** represent venues employing up to 25. In total, these findings represent at minimum 11,986 venue professionals, with figures potentially upwards of over 17,275.

### Approximate total of full-time employees employed by represented venues



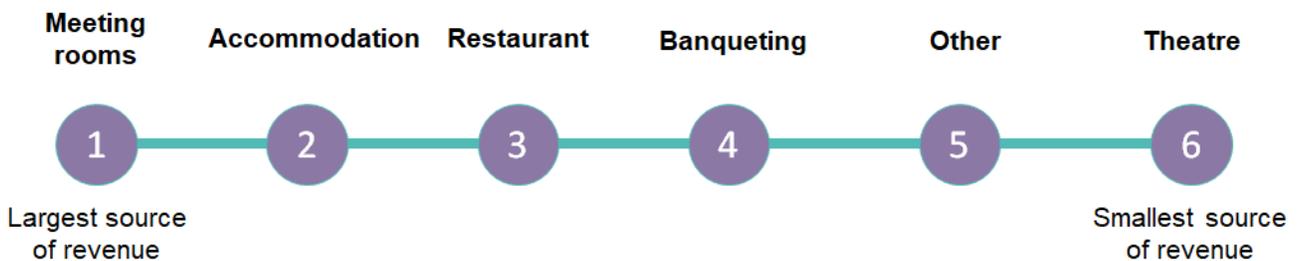
The type of venues represented include:

- Hotel (12%)
- Residential conference center (9%)
- Non-residential conference Centre (31%)
- Sporting venue (3%)
- Academic venue (17%)
- Other (27%)



## FINANCIAL

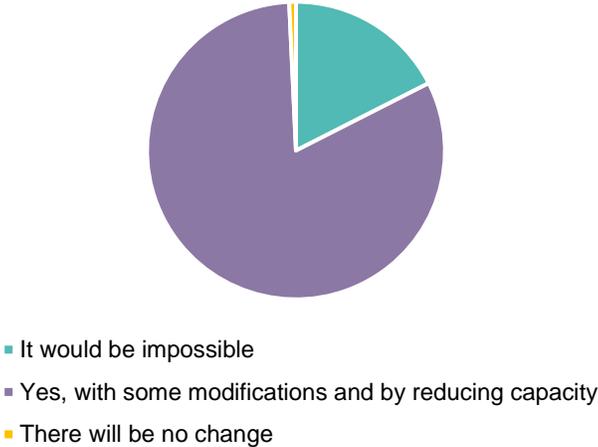
When assessing venues' main source of revenue, as expected operations are heavily impacted by social distancing. Of those responding to this specific question, operators ranked meetings rooms as the largest source of revenue. Other revenue streams include car park leasing, gym memberships and more, which are outlined as one of the smallest sources of revenue for venues.



Ranking (1 being greatest revenue stream)	1	2	3	4	5	6
Meeting Rooms	40	22	19	17	19	23
Theatre	15	10	8	11	15	10
Banqueting	13	16	20	16	19	13
Accommodation	28	10	9	6	14	8
Restaurant	19	19	18	13	11	8
Other	16	17	7	12	11	13

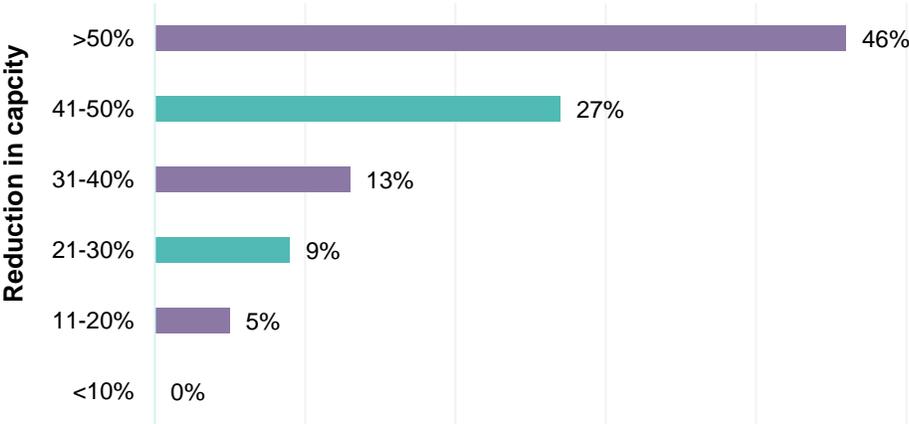
17.5% of venue operators say it would be 'impossible' to open their venue while adhering to social distancing measures, both on commercial and operations grounds. In line with such comments, just one operator said social distancing measures would have no impact on their operation, while 82% could open with modifications and reduced capacity.

**Would it be commercially/operationally viable for you to open your venue while adhering to social distancing measures?**



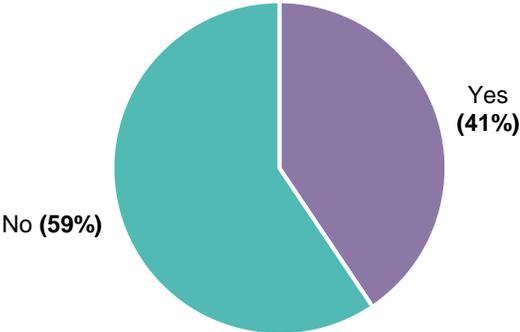
Of those stating a necessary reduction in capacity, 46% identified that this would have to be more than halved, while 27% highlighted a reduction between 41% and 50%. All impacted venues having to reduce their capacity, would have to do so at greater than 10%.

**By what percentage would you realistically have to reduce your capacity?**



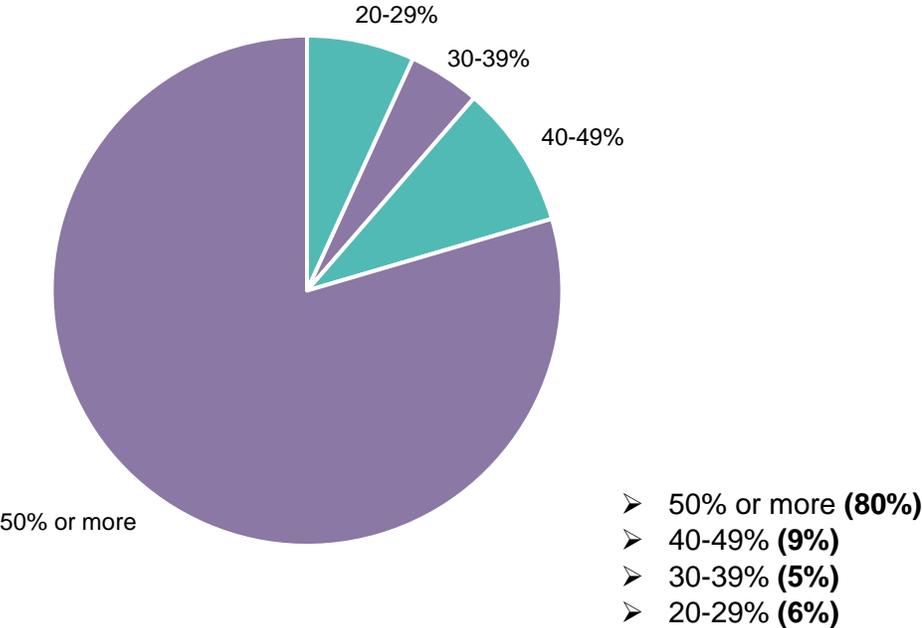
Based on these reductions in capacity, **59%** of organisations would not break even.

**With this specified reduction in capacity, would your venue break-even?**



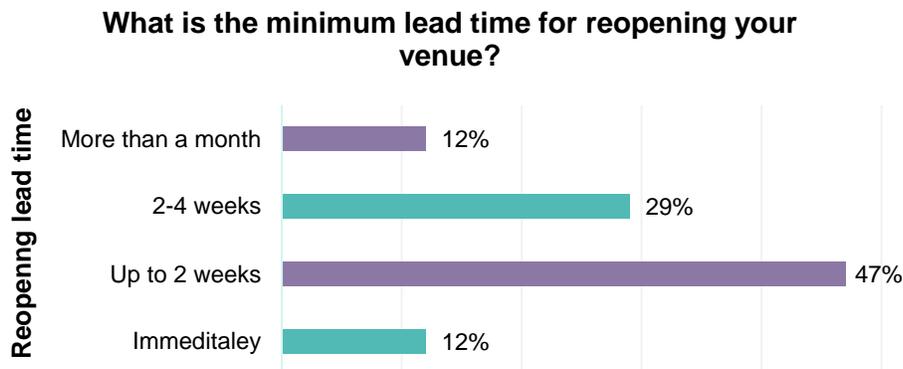
In line with these findings, **80%** of venues would expect to lose more than half of their turnover per month.

**What % of your turnover would be lost per month?**



## PRACTICAL

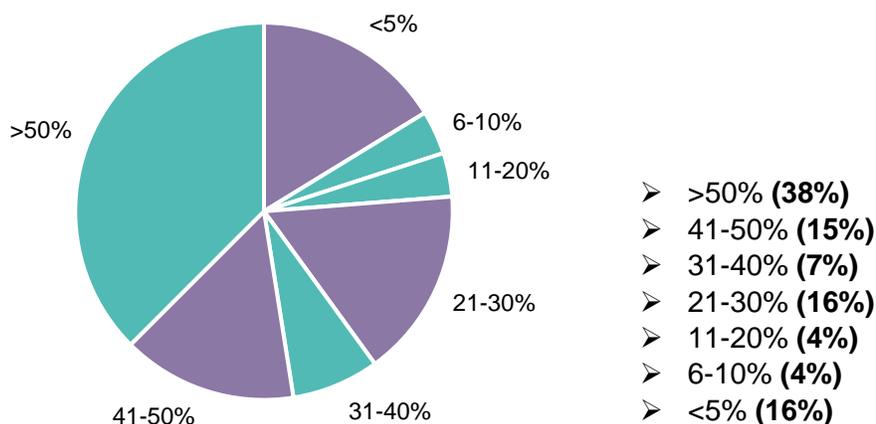
The speed in which venues can reopen – recall and retrain furloughed staff as well as restart the supply chain – is vastly increased if notice is provided. Just **12%** of venues would be able to open immediately, while **47%** would require up to two weeks lead time, **29%** between two and four weeks and **12%** over a month.



## PEOPLE

It is imperative that there is a phased reduction and extension of the government's furlough scheme. **38%** of venues highlighted that more than half of their workforce (1,953 jobs – skilled and unskilled) will be made redundant if the government's furlough scheme is not extended beyond 30 June 2020. For the mia membership, this could potentially mean a loss of 8,402 job losses.

**What percentage of your staff will be made redundant if the government's furlough scheme isn't extended beyond 30 June 2020?**



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