SCOTLAND THE PERFECT STAGE

FEEDBACK FROM EVENTS INDUSTRY COVID-19 CONSULTATION 2020

INDUSTRY CONSULTATION RATIONALE

WHY

To gather insight from the sector on the current challenges/ issues

WHO

Over 120 senior representatives from the events sector including event organisers, local authorities and supply chain

WHEN

April – May 2020

ACTION

To inform and shape a sustainable recovery plan for our important industry

STAND OUT THEMES FROM THE DISCUSSIONS

Theme 1 **INCOME STREAMS**	• Concerns about potential reductions in public sector funding for events (sport, culture & business) post Covid-19. Funding needs to be, at minimum, protected • Continue to identify where businesses "fall through the gaps" in relation to support funds – supply chain, venues and event organisers • Reduced appetite for commercial risk from event organisers, expect reduction in income from ticket sales, s'ship, lottery, trusts, individual donors • Expectation that events will not be able to deliver similar scale of impacts, future funding objectives need to reflect changed environment • Different approaches to repurposing of funding for resilience across the public sector • Necessity to develop additional funding programme to aid recovery • Ticket agents retaining credit cards sales income for events still seen to be at risk (inc 2021 events) to potentially reimburse buyers. Creating cash flow issues
Theme 2 **GOVT POLICY COMMS**	• Urgent clarity required on timescales for reintroduction of mass gatherings. EG – other nations have banned mass gatherings until specific dates • Need for guidelines on how phased reintroduction of mass gatherings will happen to allow industry time to plan for restart • Clear and concise communications on the plans for the re-introduction of mass gatherings to provide consumer & industry confidence to attend & deliver events

Theme 3 **SUPPLY CHAIN** **(security, lighting, production, catering, staging etc)**	• Work for supply chain has completely dried up, majority of staff furloughed • Supply chain is critical for recovery and delivery. Expect c. two-month planning time required to restart supply chain • Fragility of the sector, concerns the sector will no longer exist to support events (Note one major festival utilises more than 500 Scottish suppliers) • Recovery plans need to consider inter-dependencies between sectors • Diversification of the supply chain - some companies already responding to the current crisis by developing new infrastructure that is require to manage social distancing etc
Theme 4 **INSURANCE**	• Majority of events unable to claim cancellation insurance • A definitive Government date/position on when events are banned till would support events ability to claim insurance • Risk that events are priced out of the market to get insurance to cover pandemic. No insurance = no events. One major Festival has reported insurance costs quoted for 2020 have increased 700% • Consideration of Government support/underwrite • Concern around liability of event organiser should someone at their event/in community catch Covid-19. Will there be a spate of “no win no fee” claims?

Theme 5 **WORKFORCE**	• Majority of sector staff put on furlough • Concern that the government furlough scheme ends, yet mass gatherings are still banned leaving the sector in limbo and risk of heavy redundancies particularly at major venues • Importance of retaining expert workforce to restart sector • Limited current resource to plan for future events • Concern with education sector (events related courses) that there will be minimal employment opportunities for students going forward • Depletion of volunteers esp those events whose events usually supported by those who fall in high-risk category (65+) • Concern Council Licensing Departments will not be resourced adequately or agile enough to respond quickly to new and innovative ideas and could potentially stifle some kick-start ideas • Availability of emergency services and other key partners to support the planning and delivery of events post lockdown

Theme 6 **HEALTH & SAFETY**	• Need for clear H&S guidance for events in 'new norm' that defines type of mass gathering (public facing v corporate; ticketed vs non-ticketed), location (outdoor v indoor) and by venue (purpose-built v pop-up). • Concerns some venues physically unable to implement social distancing measure due to layout/design/back of house • Consult with the sector on developing the guidance • Consider financial implications and likely increased associated H&S costs (PPE, increased hygiene, tech, testing) and outline who is responsible for implementing (organiser or venue or both?) • Guidance that allows event organisers the ability to clearly articulate specific measures that are in place that gives audience, staff, suppliers and host community confidence to attend and host event • Consistent approach to and application of hygiene requirements across the country.
Theme 7 **INDUSTRY VOICE**	• Need for a co-ordinated industry voice to feed into Government - to highlight the importance of the sector to the Scottish economy - to facilitate intelligence sharing and best-practice guidance - to inform and support recovery plans and restarting the sector • Agreement to establish an Events Advisory Group to provide this voice, led by EventScotland • Role for the public agencies to collaborate and communicate on initiatives which they are leading in respond to the crisis and sharing of best practice to avoid repetition. This can be extended to include representative organisations and trade bodies.

Theme 8 **RESEARCH/ INTELLIGENCE**	• Need for ongoing research to understand consumer mindset/behaviour towards events will be critical. Behaviours will be varied across segments, markets and demographics • Community consultation and collaboration critical for host regions re-starting events • Traceability will be important. Consideration of technology/apps to track and communicate with audiences
Theme 9 **MARKETING**	• Reputational damage to Scotland as a destination given UK having highest death rate in Europe • Collective effort is required to market Scotland as safe destination • Will be competing for reduced number of domestic & international visitors • Lead times for marketing activity won't change so need to plan beyond Summer 2020 & observe triggers for revival (e.g. flights) by geography & timeline. Need to plan for worst case scenario & adapt activity accordingly as situation develops/resolves • Need to clearly define events within the term 'mass gathering' so not a catch all. Currently open to interpretation and may have negative implications for the industry if they are seen to be unsafe • With so much free digital content currently available, the ability to monetise digital content in the future will be a challenge. Difficult to demonstrate value in sponsorship rights and benefits when online content is free

Theme 10 **MISC**	• Requirement for clash calendar co-ordination (domestic & international) with many events looking to postpone. Implications for supply chain and consumer attendance • Ability for arts organisations to engage with education when future of how will operate is unclear. Very important for culture more widely but also for events who often have significant outreach programme. • General concern that although Gov't may approve the reintroduction of events, the conditions imposed may make it practically impossible.