

Market situation: United Kingdom.

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1 MARKET SITUATION AND OUTLOOK.

Since the beginning of September, there have been many developments in the political arena which make it difficult to predict whether the UK will leave the EU as per the end of October or later, and whether this will happen with or without a deal.

This adds to the generally high level of uncertainty and results in mixed signals from the economy in the UK. While some indicators remain positive (new jobs created), others are negative (GDP growth in the second quarter 2019).

Agreements are in place between Switzerland and the UK, including agreements for trade, air traffic etc., which are expected to minimise the effect of a no-deal Brexit.

It will be key what's happening with the British Pound. Over the last couple of weeks, the currency has recovered somewhat, but in the course of a year and particularly in the multi-year comparison, the Pound has lost around 20% compared to the Swiss Franc.

We continue to monitor the situation closely and will update our partners should there be any major changes.

The overnight development from the UK to Switzerland has been satisfactory so far this year, with a slight minus, which puts Switzerland in a better position than most other European countries. Just looking at the results for summer, the situation looks much better, with July - the latest publicly available results - being quite strong, with a plus of 2.8% in overnights compared to the same period in the previous year.

1.1 Situation of the UK meeting industry

The latest British Meetings and Events Industry Survey (BMEIS) - an indicator of the buying trends of leading UK event organisers from the corporate and non-profit sectors - indicates the characteristics of their events from the past year and a forecast for the year ahead.

However, one needs to be aware that these numbers don't take the implications of Brexit into account. It might well be that this situation could change dramatically, once the concrete impact of the outcome is better known. At the moment, all forecasts are very vague and drastically depend on whether the researchers worked with a no-deal Brexit scenario or else with a more orderly exit of the UK out of the EU.

MIA, the Meetings Industry Association, found that the average number of meetings held in the first six months of 2019 overall, domestic and international, fell by 15%. While the number of events reduced from the previous year, delegate numbers are up for both corporate and non-profit sectors. Associations stated that their average number of attendees amounts to 403 (up from 292 from last year) and regular association events have increased from 86 to 121. Corporates stated that their annual event attracts around 370 attendees in average (up from 238) and 130 at regular meetings (up from 79).

Jane Longhurst, CEO of MIA says: "We have seen a positive start to 2019, which reflects a reasonable level of confidence among our members. However, as we approach the Brexit deadline [of 31st October], it is likely that many organisations will be holding back on major events until we know the outcome, so venues are advised to look at innovative ways to convert enquiries and help them continue to ride the storm."

Nevertheless, daily delegate rates increased in both sectors. For both sectors, added value items are crucial. It is important for them to have a complete overview of what is included in the price. Especially Swiss destinations and suppliers have many added benefits for buyers, e.g. breakfast included, lowest VAT rate in Europe, often free public transport in the destination, so it is paramount for them to list these added values for buyers when they provide them with a quote.

51% of the responding corporates and 27% of associations had held their events overseas. Top countries were France, Germany, Spain and Ireland. About half of the respondents said that their events won't be affected by Brexit. However, again, these results were gathered a while back and it might well be that the outcome of this survey with the current Brexit developments would look fundamentally different.

According to the CWT Meetings & Events Report 2019, London remains the top city for meetings in Europe, followed by Moscow, Barcelona and Berlin. One of the many reasons for London heading up the list might also be the growing insecurity of businesses holding event in the EU zone in the near future.

However, this is not necessarily a disadvantage for Switzerland. Switzerland and the UK have negotiated multiple agreements between the two countries for any outcome Brexit may have, regardless of whether there will be no-deal Brexit or a more orderly exit. Switzerland is well prepared to, also in the future, do business with the UK, and vice-versa. Even though it might sound like calculated optimism, but Brexit might turn out to be an opportunity for Switzerland in the competition with EU countries.

In fact, Switzerland was mentioned as one of the new "emerging" destinations for 2019, with event planners mentioning it several times as a destination that they have started using in 2019.

As part of the C&IT State of the Industry: Agency report 2019, the top 50 agencies were asked what types of events planners have organised in the past year. 46% of agencies stated that the IT sector has brought them the most business, up from 35,7% in the last year. Only 37% (down from 60%) of agencies say that financial services was one of their top three sectors for turnover. The automotive sector saw an equal drop from last year, falling from 35,7% to only 16% in the last 12 months. Pharmaceutical events were now mentioned by 28% of agencies, compared to 34,2% last year.

1.1.1 Challenges

As part of their State of the Industry: Agency report, C&IT released the five main challenges for UK-based events agencies in 2019. Not surprisingly, Brexit heads up the list with 32% of respondents stating that it is their paramount challenge for the upcoming months. As further challenges were mentioned: Talent recruitment, business growth, client relations and budgets/ROI.

Brexit

Agencies are concerned about the outcome of Brexit but have been preparing for different scenarios for more than a year now. They are insecure about the implications of the outcome on travel, etc. to the EU.

Talent acquisition

A prevalent topic for event planners remains the acquisition of talent, as well as retaining it. A lot of events executives are young and have a dynamic view of changing employer, which makes it hard for agencies to keep them. Besides this, the number of freelancers rises rapidly, making it hard for event agencies to ensure having the capacity and resources for events with short lead times.

Shorter lead times

Brexit might also significantly affect the lead times for events. This is due to companies being reluctant to commit to events far in advance, and therefore being more likely to decide more spontaneously about upcoming events. This will put a strain on planner resources and will ultimately impact the suppliers as well. Planners will, more than ever, be dependent on short returns and quick responses of suppliers.

1.1.2 Trends

Wellness/Wellbeing

A big trend in the UK events industry, not only in terms of the actual events, but also in regard to working in the industry as such, is health, especially wellness and wellbeing. The discussion about work/life balance and mental health is getting louder, and event planners try to involve aspects of wellbeing in events more and more. This development is an opportunity for Switzerland with its small cities so close to the relaxing nature, with its clean air, local produce, etc. Suppliers should, whenever possible and relevant, educate the planners about the options of wellbeing in their destination. As an addition to this, many Swiss hotels have above-average spas on their premises. It might be beneficial for them to mention this, however, this has to be relevant to the enquiry and the client.

Bleisure

Hand in hand with wellbeing goes the trend of bleisure, a mix between business and leisure. With millennials now becoming the main work force, it is important to understand their way of travelling, as this ultimately impacts the way they want to be engaged in events. Studies show that millennials prefer shorter but more frequent breaks, rather than few long holidays during the year. This trend can have different implications for the MICE business, depending on the type of event. For conferences, it could mean that millennials are more likely to want to extend their business stay for a couple of days. This means that the destination is becoming more important than ever.

For incentives on the other hand, this could either mean that the trend could move towards smaller but more frequent incentive trips, rather than big annual trips. On the other hand, long-haul destinations could appeal more to millennials as they spend more of their annual leave in short-haul destinations.

Sustainability/CSR

Sustainability and CSR has been at the top of many trend forecasts for years. The MPI Meetings Outlook states that many companies continue to have CSR on their agenda for a successful event, however, 40% of agencies say that cost is the biggest obstacle to making events greener. Nevertheless, 24% of the agencies say that there is no clear mandate to prioritise sustainability. Despite this, agencies now tend to actively promote including CSR options in their pitches. As Switzerland has so much to offer in this regard, it is important that whenever possible, sustainability and CSR should be promoted actively.

1.2 RFP situation in the United Kingdom

So far in 2019, SCIB UK has received 117 enquiries, which is slightly less than in 2018 (127 enquiries). This is in line with MIA's latest research, stating that overall, the average number of meetings held in the first six months of 2019 fell by around 15%. Another reason for the lower number in Q3 of 2019 is the fact that the timing of the yearly RFP survey has been changed to autumn, instead of June. The reason for this is that several companies, especially ski incentives operators have said that enquiries for the next winter season tend to only come in autumn. Therefore, these enquiries are not recorded yet.

In terms of converted business, SCIB UK has currently recorded 55 confirmed or carried out events in Switzerland in 2019, which results in a realisation quote of 47%. With 58 enquiries still pending with the arrival date of 2019, this realisation quote can still change a lot.

With the current political circumstances in the UK and the unknown impact on the events industry, the future booking situation remains uncertain. It stays important to be present in the market and to educate the event planners about the advantages of holding events in Switzerland, particularly with the insecurities around the future relationships with EU countries.

2 TARGETS.

- Fast, pro-active and professional approach towards the market
- Maintain strong market presence and explore new paths where possible, both KMM and KAM

- Generate new awareness and keep existing clients' interest in Switzerland as a MICE destination
- Develop new strategies to market SCIB and Switzerland as a MICE destination
- Continue to support buyers with our much-valued quality service
- Update and evaluate existing database
- Improve quality of existing marketing activities
- More focus on UK association market in co-operation with head office
- Target corporate clients who have a strong relationship to Switzerland

3 CURRENT DATABASE SITUATION.

Kind	Contacts
Agencies	3318
Corporates	1054
Association	441
Media	20

4 DETAILED MARKETING ACTIVITIES.

Further details of past, present and future marketing activities can be found on www.stnet, which can be accessed by using your personal username and password.

Sources

- British Meetings & Events Industry Survey (BMEIS) 2019
- Content sessions at C&IT Agency Forum 2019
- C&IT Wellness Report
- C&IT State of the Industry: Agencies report
- PWC Economic Outlook July 2019
- CWT Meetings & Events Report 2019
- MPI Meetings Outlook summer 2019
- IPA Bellwether Report Q2
- BCD Meetings & Events – What's trending 2019 report
- Articles of C&IT, M&IT and CMW online

UK/IRELAND

01/01/2020 – 31/12/2020	E-Marketing: Social Media	Comments	Cost CHF 0
	SCIB UK is using Twitter and LinkedIn to communicate with UK MICE buyers. @SCIB_UK: 1'830 followers LinkedIn: 750 followers		Content will be edited by SCIB UK but partner contributions are welcome. Send your inputs via e-mail or tag @SCIB_UK on Twitter.
01/01/2020 – 31/12/2020	E-Marketing: Stand alone E-Mail Newsletter	Comments	Cost CHF 500
	Special edition of E-Newsletter in SCIB UK format about your destination/company. Content provided by partner and edited by SCIB. Sent to approximately 3000 buyers.		Participation: Content sent by partner and edited/distributed by SCIB UK
01/01/2020 – 31/12/2020	KAM: Fam Trips for MICE buyers	Comments	Cost CHF 0
	SCIB UK organises several fam trips to Swiss destinations, with each approx. 6 - 8 agency and corporate buyers.		Participation: SCIB partner covers full sponsorship of program on site. SCIB UK provides flights and train tickets.
01/01/2020 – 31/12/2020	KAM: Sales Calls Roadshow	Comments	Cost CHF 4'700
	2-3 full days sales calls roadshow, organised by Moulden Marketing. Depending on clients' availabilities, dinners/lunches can be included too.		Participation: Open to Subpartner, max. 2 partners, mentioned costs are for one partner, costs will be lower if 2 partners attend Location: tbd, in consultation with attending SCIB partner or SCIB Subpartner Dates: tbd, in consultation with attending SCIB partner or SCIB Subpartner
01/01/2020 – 31/12/2020	KAM: Moulden Marketing Destination Showcases	Comments	Cost CHF 750
	One day one-on-one meeting-style event with approx. 15-20 meetings. A very cost effective way to meet UK buyers, takes place 2x per year (January and August).	Please specify which date you would be interested in, January or August 2020. If more partners are interested, SCIB UK will put the partners in contact with Moulden Marketing directly.	Participation: Open to Subpartner Location: Central London Dates: January forum on 23rd January, summer dates tba

01/01/2020 – 31/12/2020	KAM: CMW Roundtable Discussion	Comments	Cost CHF 5'200
	<p>Together with CMW Magazine (Conference & Meetings World), 8-12 leading agency MDs are invited to a roundtable discussion about a relevant, current industry topic. Various pre- and post-event coverage and branding (CMW website, print magazine, newsletter and social media) as well as input for the roundtable discussion topic is included in the package, alongside the attendance at the discussion.</p>		<p>Participation: Open for SCIB partners only Location: Central London Date: tbd, several dates available during the year 2020</p>
14/01/2020 – 16/01/2020	KAM: M&IT Agency Challenge Ireland	Comments	Cost CHF 4'900
	<p>The successful M&IT Agency Challenge, normally taking place in Wales every year, has now been duplicated in Ireland, in order to target the Irish buyers who are normally very hard to meet. The first M&IT Agency Challenge Ireland takes place at the Castleknock Hotel in Dublin and includes interactive challenges as well as 1-on-1 meetings.</p>		<p>Participation: Open for SCIB partner only, costs for a shared participation with SCIB UK</p>
01/02/2020 – 31/03/2020	KAM: M&IT Award Night	Comments	Cost CHF 0
	<p>The M&IT Awards is the UK MICE industry's biggest and most prestigious recognition event. It is organised by Meetings & Incentive Travel magazine and brings together all sectors of the business to reward excellence of service and product. There are many ways to be part of the M&IT Awards including voting, sponsorship and attendance. The event attracts more than 1'300 industry professionals.</p>		<p>Participation: Open to SCIB partner only, costs are depending on type of sponsorship. Location: Battersea Evolution, Central London Date: tba, either Friday, 28th February or Friday, 6th March 2020</p>
21/02/2020 – 22/02/2020	KAM: Bridelux Venues & Destinations (destination wedding)	Comments	Cost CHF 0
	<p>Bridelux Venues & Destinations is the world's largest luxury wedding show dedicated to Venues and Destination weddings.</p>		<p>Open to subpartner Price to be confirmed</p>
	<p>At the third edition of our Bridelux Venues & Destinations show you will see a selection of elite venues and destination wedding and honeymoon specialists coming together at The May Fair Hotel. This is the only place to meet with a wide range of luxury specialists from key locations in the UK across the world all in one place.</p>		
01/03/2020 – 31/10/2020	KAM: SCIB UK Event Series "Switzerland Meetings Championships UK"	Comments	Cost CHF 2'900
	<p>SCIB UK launches a new series of interactive networking events in the style of a competition with team-building activities. With one event in Manchester, one in London and one in Birmingham, SCIB UK invites agencies and corporates from the respective areas to join a fun afternoon/day to compete for the title of the "Switzerland Meetings Champion" and to win a trip to Switzerland. With the help of team-building activities, quizzes, etc., bonding and networking is made easy, the aim is to attract approx. 20 participants per event. Possible collaboration with industry media for coverage pre- and post-event. This is a new format of networking events and SCIB UK works together with a renowned agency to design the networking activities. For 2020, 3 events are planned (3 SCIB partners possible, one per location), there is a possibility to expand the format in the future.</p>		<p>Participation: Open for SCIB partners only, one partner per location (Manchester, Birmingham, London) Location: tbd, one event in Manchester, one in Birmingham, one in London Dates: tbd, between spring and autumn 2020</p>

05/03/2020 – 08/03/2020	KAM: The Meetings Space, Spring	Comments	Cost CHF
	The Meetings Space (TMS) is the leading one-on-one meetings style event with buyers predominantly from the UK, plus Germany and other top European markets. The buyers are triple-qualified and TMS offers up to 85 hosted buyer spaces. With the meetings and accommodation in one spot, the networking opportunities can be used to the fullest. The event consists of 3 days of 1-on-1 meetings and two evening events.	If more than one partner is interested, SCIB UK will allocate partners accordingly.	4'800 Participation: Open to Subpartner, max. 1 partner, costs for shared table with SCIB UK Location: tba, Europe
06/04/2020 – 08/04/2020	KAM: MICE MeetUp Dublin	Comments	Cost CHF
	Travelmedia.ie is a Dublin based travel company and organises B2B workshops for the travel industry. Predominantly focusing on leisure, TM organises its second MICE MeetUp event in Dublin. The event starts off with networking drinks, followed by 1on1 meetings. In the evening, everyone gathered for a gala dinner.		1'100 Participation: Open to Subpartner, max. 1 partner. Shared table with SCIB UK. Location: Central Dublin
23/04/2020 – 25/04/2020	KAM: Break The Ice Forum in London	Comments	Cost CHF
	The Break The Ice Forum is an intimate workshop in central London with approx. 35 buyers attending. It includes 20 pre-scheduled one-on-one meetings, lunches and gala dinners for additional opportunities to meet the buyers. 70% of the buyers are from the UK, the rest from EU countries. The small size of the forum makes it easier to meet buyers on a personal level.		2'100 Participation: Open to SCIB partner only, max. 1 partner, costs for shared table with SCIB UK Location: Central London
11/06/2020 – 13/06/2020	KAM: The Meetings Space, Summer	Comments	Cost CHF
	The Meetings Space (TMS) is the leading one-on-one meetings style event with buyers predominantly from the UK, plus Germany and other top European markets. The buyers are triple-qualified and TMS offers up to 85 hosted buyer spaces. With the meetings and accommodation in one spot, the networking opportunities can be used to the fullest. The event consists of 3 days of 1-on-1 meetings and two evening events.	If more partners are interested, SCIB UK will allocate partners accordingly.	4'800 Participation: Open to Subpartner, costs for a shared table with SCIB UK Location: tba, Europe
01/07/2020 – 31/07/2020	KAM: M&IT Agency Challenge	Comments	Cost CHF
	This live interactive event brings together buyers and suppliers for 2 days and three nights full of engagement and interaction, including a mixture of short presentations, team building and networking. A new and innovative way to network with MICE buyers, similar format to the Switzerland Meeting Trophy.		4'500 Participation: Open to SCIB partners only, max. 1 partner possible, costs for a shared participation with SCIB UK Location: Wales Date: tba, July 2020
01/07/2020 – 31/08/2020	KAM: C&IT Agency Forum	Comments	Cost CHF
	This two-day 1-on-1 meeting style event is organised by Haymarket/C&IT Magazine and targets agency buyers. In addition to the meetings, there are seminars for buyers and further networking opportunities over lunch and dinner for suppliers and buyers. Attendance of about 80 MICE buyers.		4'500 Participation: Open to SCIB partners only, costs for a shared table with SCIB UK Location: tba, UK or Ireland Dates: tba, July/August 2020

01/07/2020 – 31/10/2020	KAM: Destination Alliance Agency Event, London	Comments	Cost CHF 1'000
	<p>The Destination Alliance, formerly known as the Oysters, are a group of 30-35 national convention bureaux based in London. In 2020, the yearly agency networking event will have a new format which still needs to be defined by the board, same as the dates. The aim is to welcome approx. 100 MICE buyers, the attending destinations showcase their destination with food, drinks and an innovative activity and entertainment.</p>		<p>Participation: Open to SCIB partner only, together with SCIB UK. max. 1 partner. Confirmation of participation of SCIB partner can only be confirmed in 2020 after the EOI deadline of the Destination Alliance. Location: Central London Date: Summer or autumn 2020</p>
01/09/2020 – 30/09/2020	KAM: PA Life Summit	Comments	Cost CHF 3'500
	<p>The PA Life Summit connects senior and board-level PAs and EAs with leading product and service providers for one day of one-to-one meetings and business networking. It is a unique opportunity to network with 60+ senior level executives from corporate companies across the UK. Besides the appointments, there are networking opportunities, a networking 1 hour lunch and the evening Gala Dinner.</p>		<p>Participation: Open to Subpartner, costs for shared table with SCIB UK Location: Central London Date: tba, September 2020</p>
01/09/2020 – 30/09/2020	KAM: M&IT Corporate Challenge	Comments	Cost CHF 4'800
	<p>M&IT has launched a new client event for the corporate event planner in response to demand from industry suppliers who have experienced the M&IT Agency Challenge. The event will be organised in association with the Event Marketing Association (EMA). The M&IT Challenge format is a unique, interactive concept that is exciting, engaging and completely different from other standard buyer/supplier events in the market. It takes place over two days.</p>		<p>Participation: Open to SCIB partners only Location: The Lensbury Hotel, Central London Date: tba, September 2020</p>
01/09/2020 – 30/09/2020	KAM: SCIB Annual Networking Event, London	Comments	Cost CHF 1'900
	<p>SCIB puts together a Swiss networking event where the attractiveness of Switzerland as a meetings destinations is showcased. The event will be, as every year, themed, so that the buyers have a stronger incentive to attend. The aim is to welcome 40-50 MICE buyers.</p>		<p>Participation: Open to Subpartner, max. 10 partners possible Location: Central London Date: tbd, September/October 2020</p>
24/09/2020 – 26/09/2020	KAM: The Meetings Space, Autumn	Comments	Cost CHF 4'800
	<p>The Meetings Space (TMS) is the leading one-on-one meetings style event with buyers predominantly from the UK, plus Germany and other top European markets. The buyers are triple-qualified and TMS offers up to 85 hosted buyer spaces. With the meetings and accommodation in one spot, the networking opportunities can be used to the fullest. The event consists of 3 days of 1-on-1 meetings and two evening events.</p>	<p>If more partners are interested, SCIB UK will allocate partners accordingly.</p>	<p>Participation: Open to Subpartner, costs for a shared table with SCIB UK Location: tba, Europe</p>

01/11/2020 – 30/11/2020	KAM: Event Agency Forum	Comments	Cost CHF 3'000
	The Event Agency Forum is a new one-day forum-style event with pre-arranged 20-minute meetings with agency buyers from the UK, organised by Forum Events. Around 60 delegates in attendance, minimum of 12 meetings.		Participation: Open for SCIB partners only, costs are for a shared table with SCIB UK Location: Central London Date: tba, November 2020
01/12/2020 – 31/12/2020	KAM: Destination Alliance Association Lunch	Comments	Cost CHF 1'000
	The Destination Alliance, formerly known as the Oysters, are a group of 30 national convention bureaux based in London. At the annual association lunch, around 12 bureaux host association buyers for a luncheon with an relevant guest speaker for the industry.		Participation: Open to SCIB partners only. Confirmation of participation of SCIB partner only after the deadline of the EO1 of the Destination Alliance (approx. October 2020) Location: Central London Date: tba, December 2020
01/01/2020 – 31/12/2020	KMM: Key Media Management	Comments	Cost CHF 0
	SCIB UK will continue liaising with key media in the UK in order to get best exposure and also value for money deals. The main magazines remain: - C&IT, Conference & Incentive Travel, circ. 18'500 - M&IT, Meeting & Incentive Travel, circ. 22'280 - Squaremeal Venues & Events, 54'777 SCIB will look out for any opportunities in order to be covered wherever possible. This is ongoing and partners will be notified when needed.	SCIB UK has preferential rates for advertisement. Please contact us if you are interested in working together with UK trade press.	Participation: depending on magazine, agreement, package, etc.