

# Impact of the corona crisis on the event sector in Belgium

Results of a national survey in **September 2020**

KdG  
Expert  
Karel de Grote Hogeschool

## Public Impact

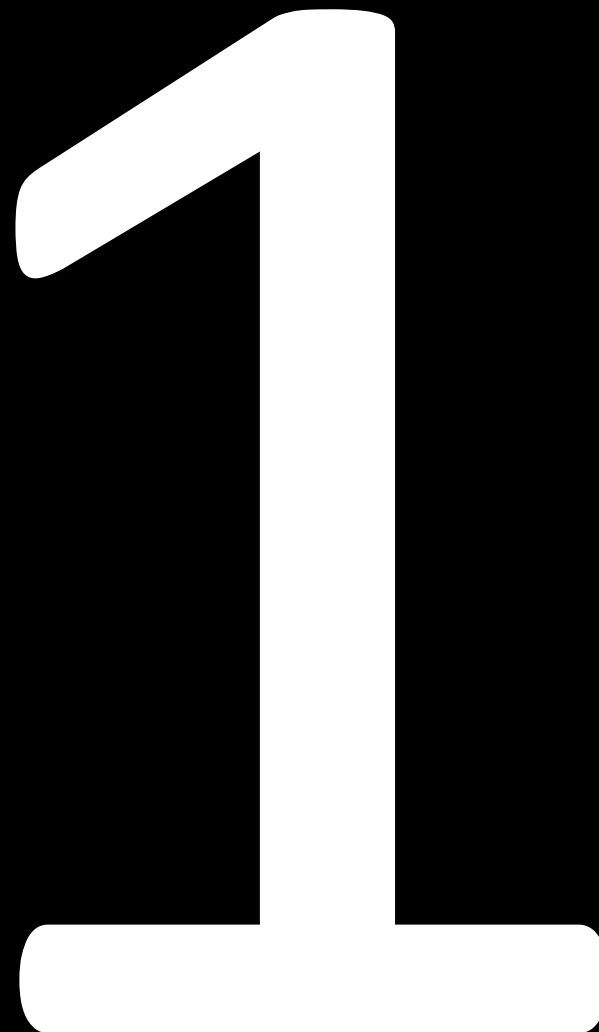
Centre of expertise for the event sector

# Content

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1. Methods
2. Results
3. Key findings

# Methods



# The study

## Research problem

Data is needed to be able to assess the impact of the corona crisis on the Belgian event sector now and in the near future. This will help convincing governments that the sector is hurting and needs tailored support measures. The study was conducted by the centre of expertise Public Impact of the Karel de Grote University College, on the initiative of the different sectoral federations and Experience Magazine, with the support of VISITFLANDERS and EventFlanders.

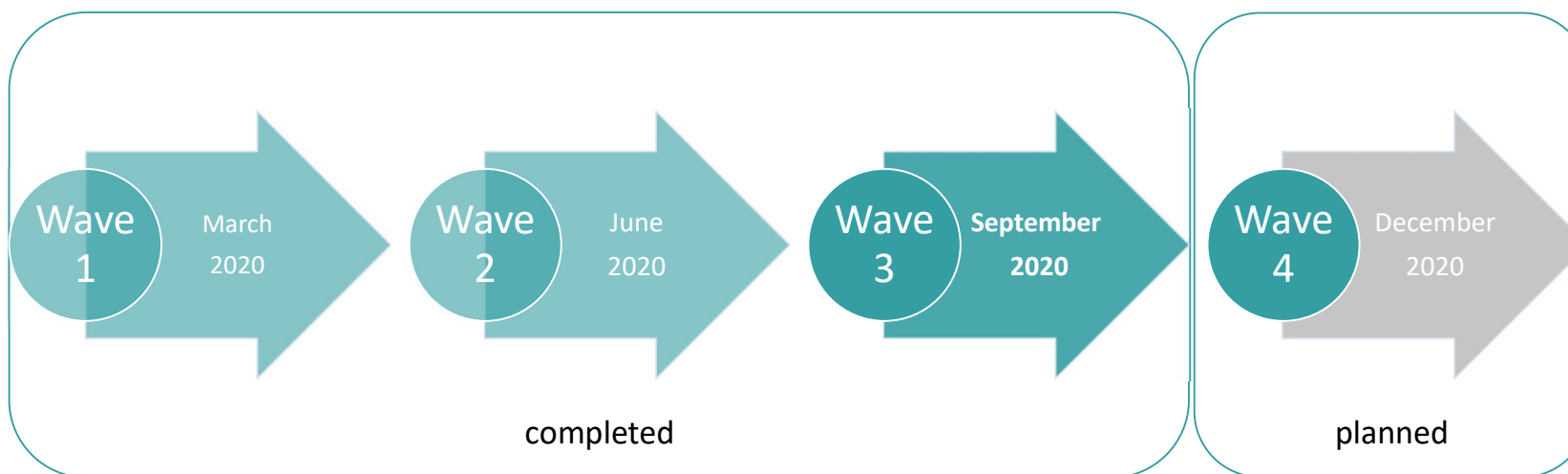


## Central research questions

- What is the **impact** of the corona crisis on the Belgian event sector now and in the future?
- What support is (further) needed for the sector?

# The study

## Survey waves



# Methods

- National **survey** with event professionals (September 9 - September 23, 2020)
- Targeted **recruitment** via existing panel (September 9 + reminders on September 16 + 21)
- **Cleaning** dataset
- Analysis, reporting and publication of **key findings** and relevant **evolutions**
- Analysis and **reporting** of all data and findings
- Planning **final surveys waves**

# Introduction text survey

Dear event professional

Thank you for being here again!

Compared to our previous survey on the impact of the corona crisis on the event sector, this questionnaire is considerably shorter. Filling it out will only take a few minutes of your time.

Some of the questions are the same as last time, for reasons of comparison. We also added a couple of new ones. Once again, your response is crucial to assess the current state of play in the event sector, and to combine our efforts in ensuring that the sector is able to thrive again. All answers will be treated in confidence and will be anonymised.

Many thanks for your cooperation and helping us to support your business!

Centre of Expertise Public Impact

Karel de Grote Hogeschool

[www.publicimpact.be](http://www.publicimpact.be)

KdG Expert  
Karel de Grote Hogeschool

# The sample



# Who is included in the survey?

Are you professionally active or involved in the organisation, supplying to and/or hosting of events, conferences, exhibitions, festivals, incentives, meetings and/or other types of events?

No



Yes



Was more than half of the 2019 annual turnover (excl. VAT/BTW/TVA) of your company/organisation derived from event-related activities? (annual turnover = 'jaaromzet' = 'chiffre d'affaires annuel')

No



Yes



Excluded from analyses in W1 & W2

# Who is included in the survey?

Are you professionally active or involved in the organisation, supplying to and/or hosting of events, conferences, exhibitions, festivals, incentives, meetings and/or other types of events?

No



Yes



Included in analyses in  
W1 & W2

n W1 = 1.119

n W2 = 392

Was more than half of the 2019 annual turnover (excl. VAT/BTW/TVA) of your company/organisation derived from event-related activities? (annual turnover = 'jaaromzet' = 'chiffre d'affaires annuel')

No



Yes



Excluded from analyses in W1 & W2

# Who is included in the survey?

$$\begin{aligned} n \text{ W1} + n \text{ W2} \\ = 1.119 + 392 \\ = 1.511 \end{aligned}$$

In order to maximise (government) support for the event sector, we wish to periodically assess the situation of the event sector in Belgium over the coming months. To do so, each opinion is important. Therefore, we would like to contact you again in the future to participate in one or two short follow-up surveys. This would enable us to collect even more valuable data to support the sector. In addition, we would like to keep you informed about the results of this and any possible future surveys if you are interested.

- ☐ No, do not contact me again on this matter
- ☒ Yes, feel free to contact me again for a follow-up survey
- ☐ Yes, please share the results with me

W1: 58% 'yes' = 648  
W2: 65% 'yes' = 254

W1 + W2 = 902  
Minus doubles 137

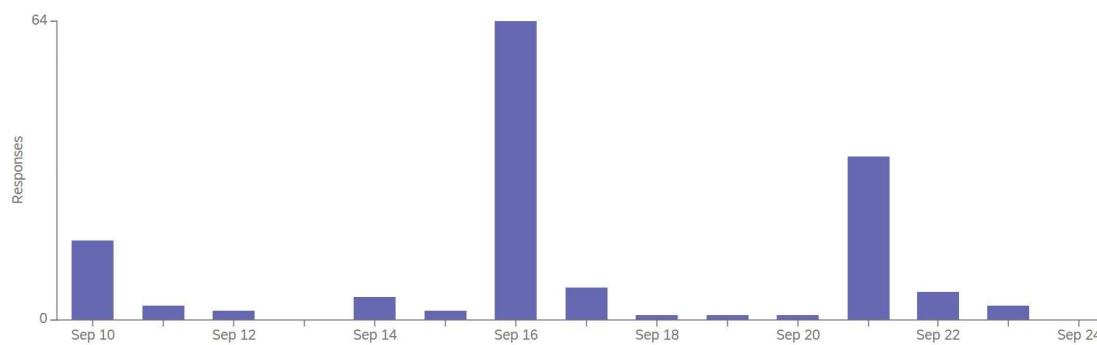
PANEL W1+W2 = 765

# Sample size

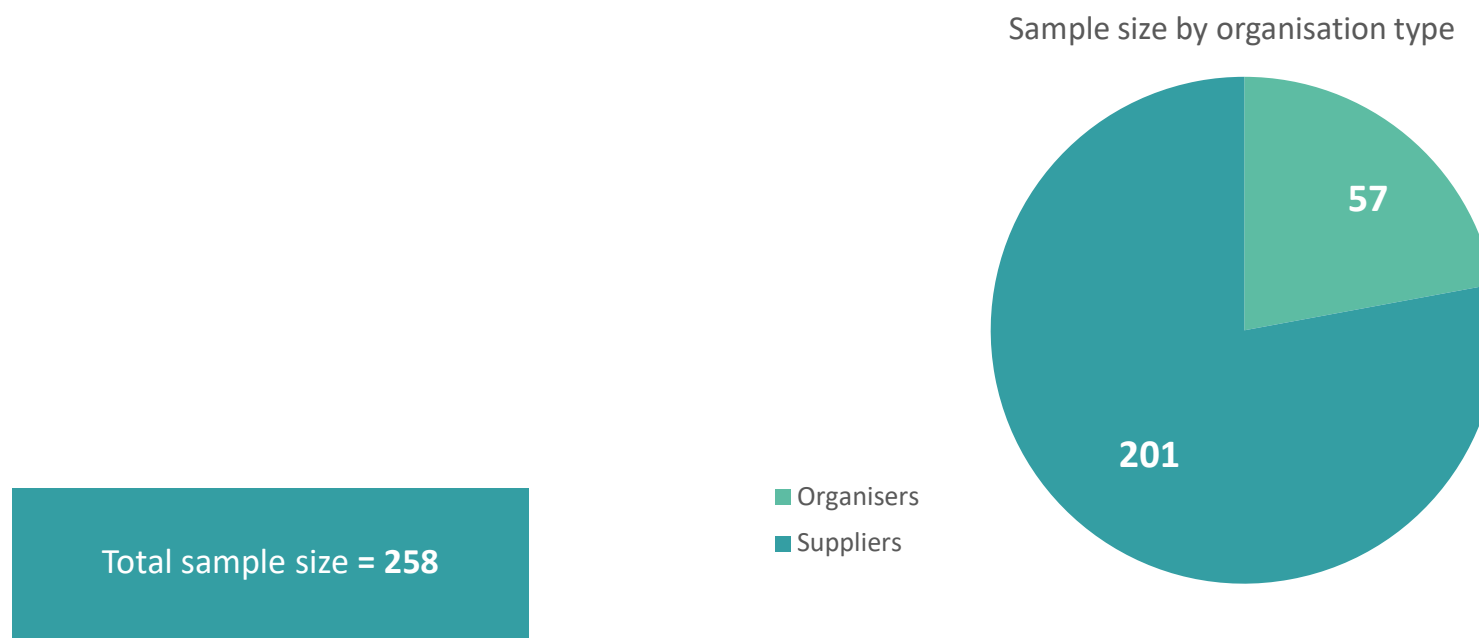
Total sample size = **258**

Response ratio on panel = **34%**

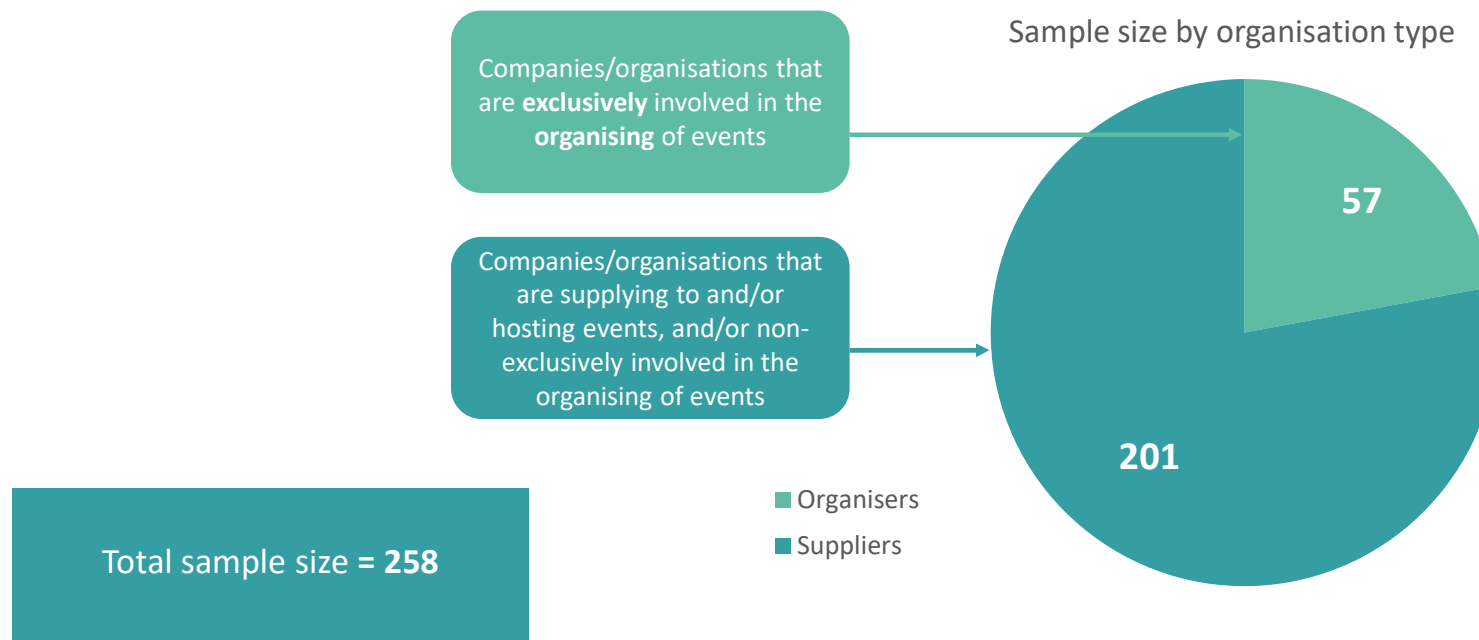
Recent Responses



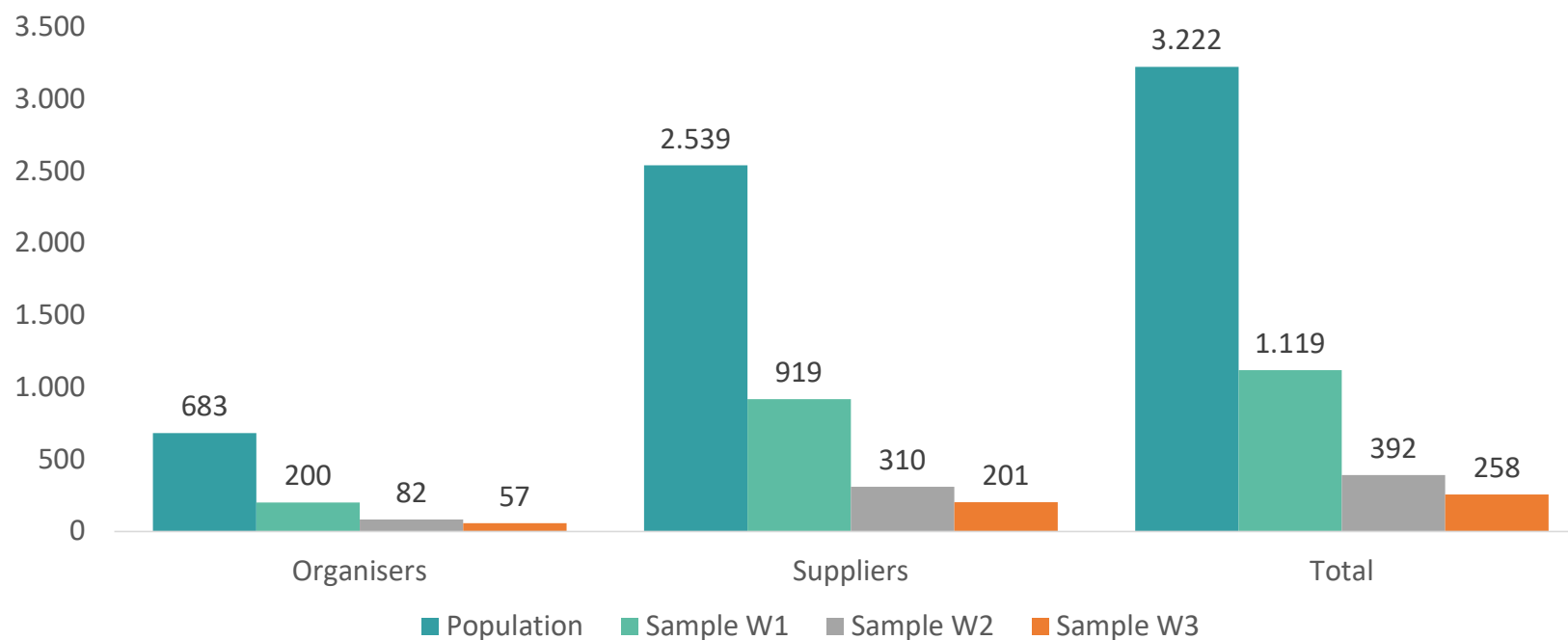
# Sample size



# Sample size

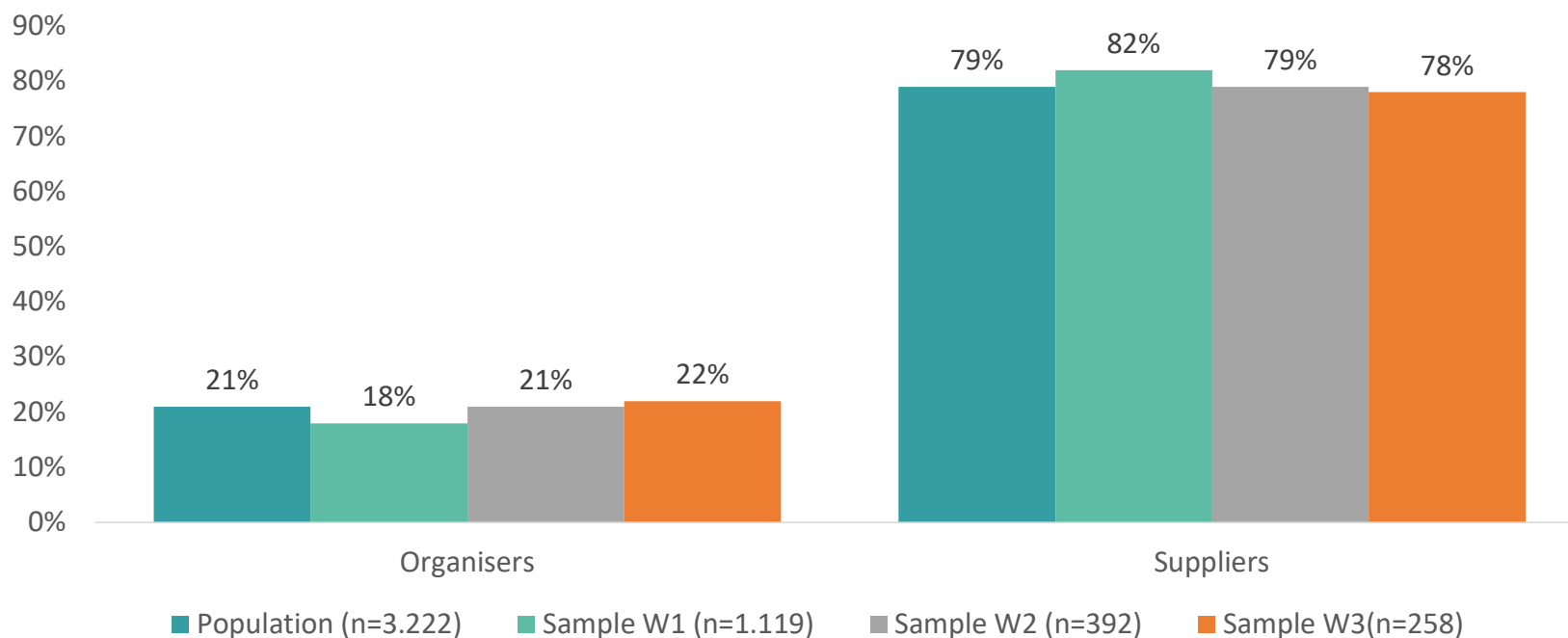


# Sample size vs population size\*



\* Population size assessed in KdG/BESA study 2018. More info: [www.publiekeimpact.be/evenementensector](http://www.publiekeimpact.be/evenementensector)

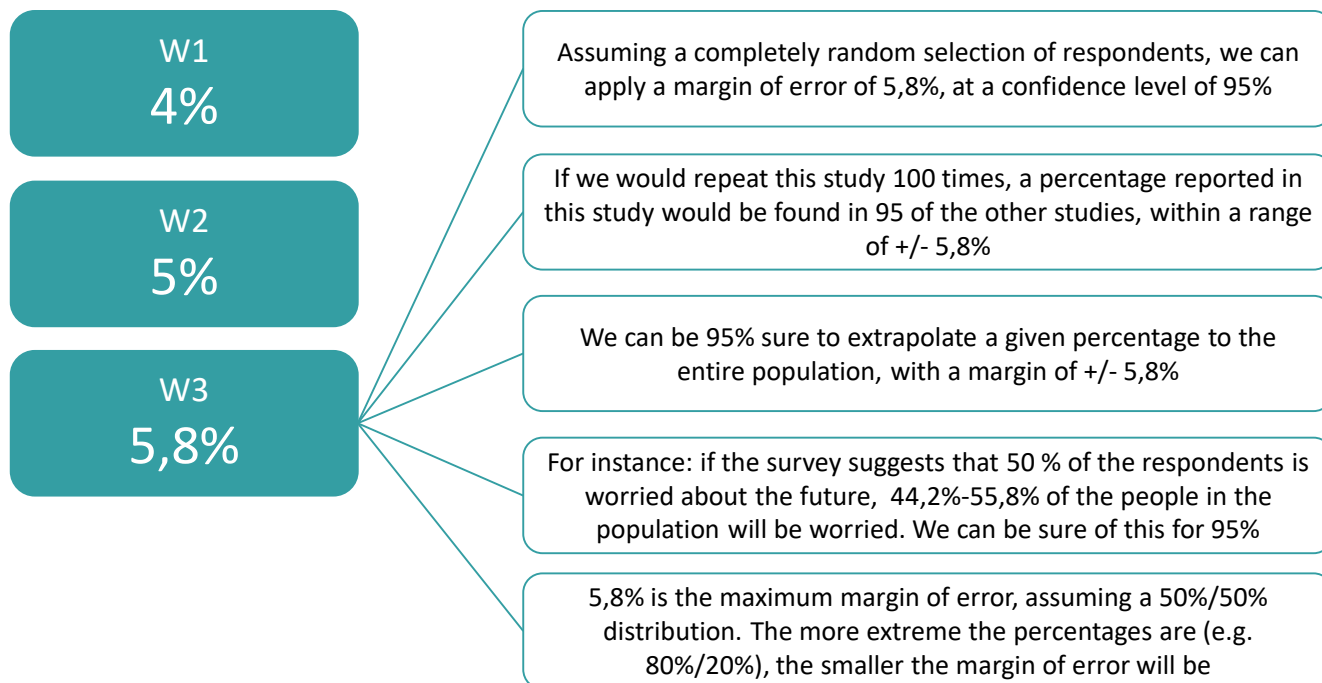
# Sample size vs population size\*



\* Population size assessed in KdG/BESA study 2018. More info: [www.publiekeimpact.be/evenementensector](http://www.publiekeimpact.be/evenementensector)



# Margin of error\*



\* Population size assessed in KdG/BESA study 2018. More info: [www.publiekeimpact.be](http://www.publiekeimpact.be).

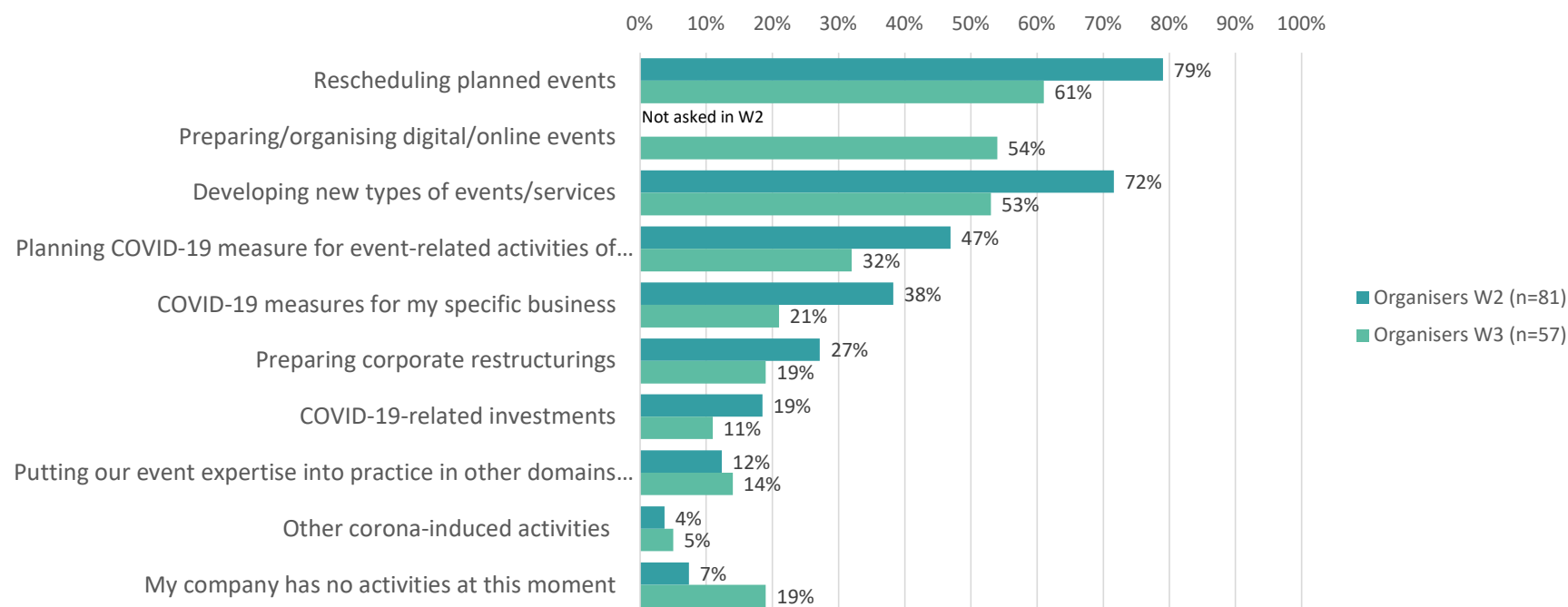
# Results

2

# Current activities

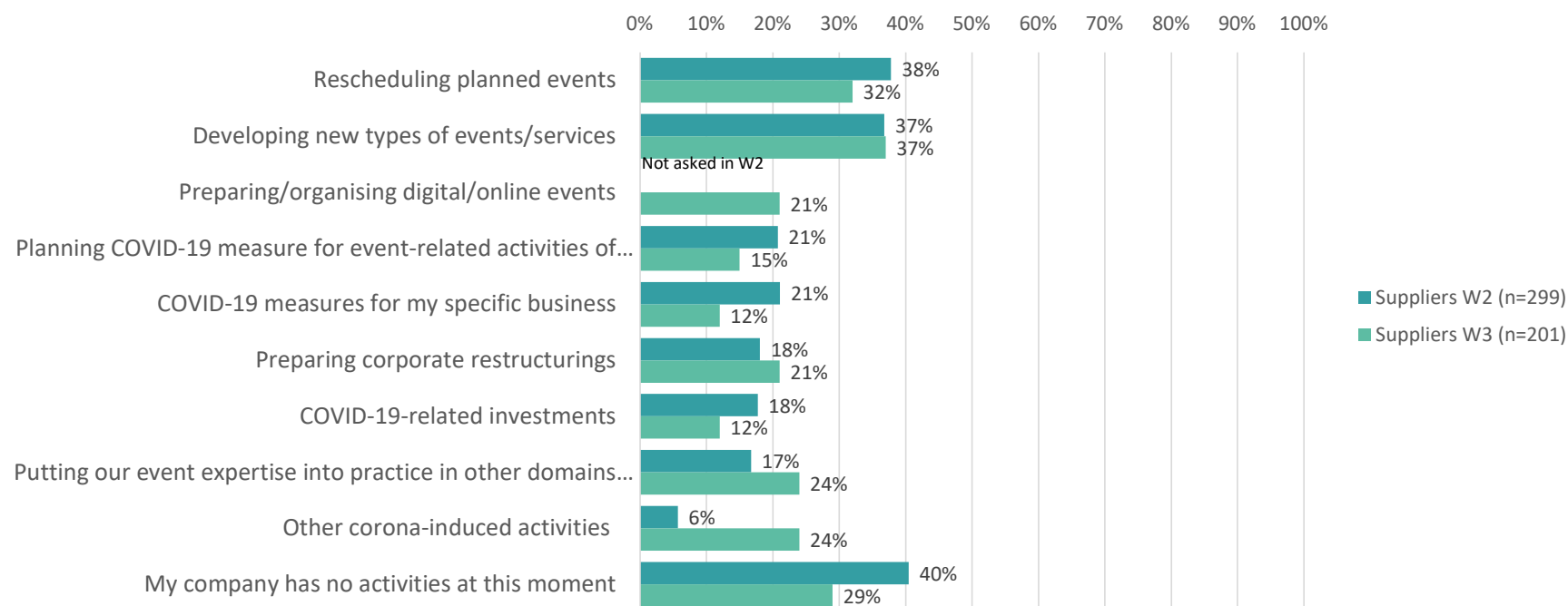
# Current activities (organisers)

Which of the following corona-induced activities is your company/organisation currently undertaking?



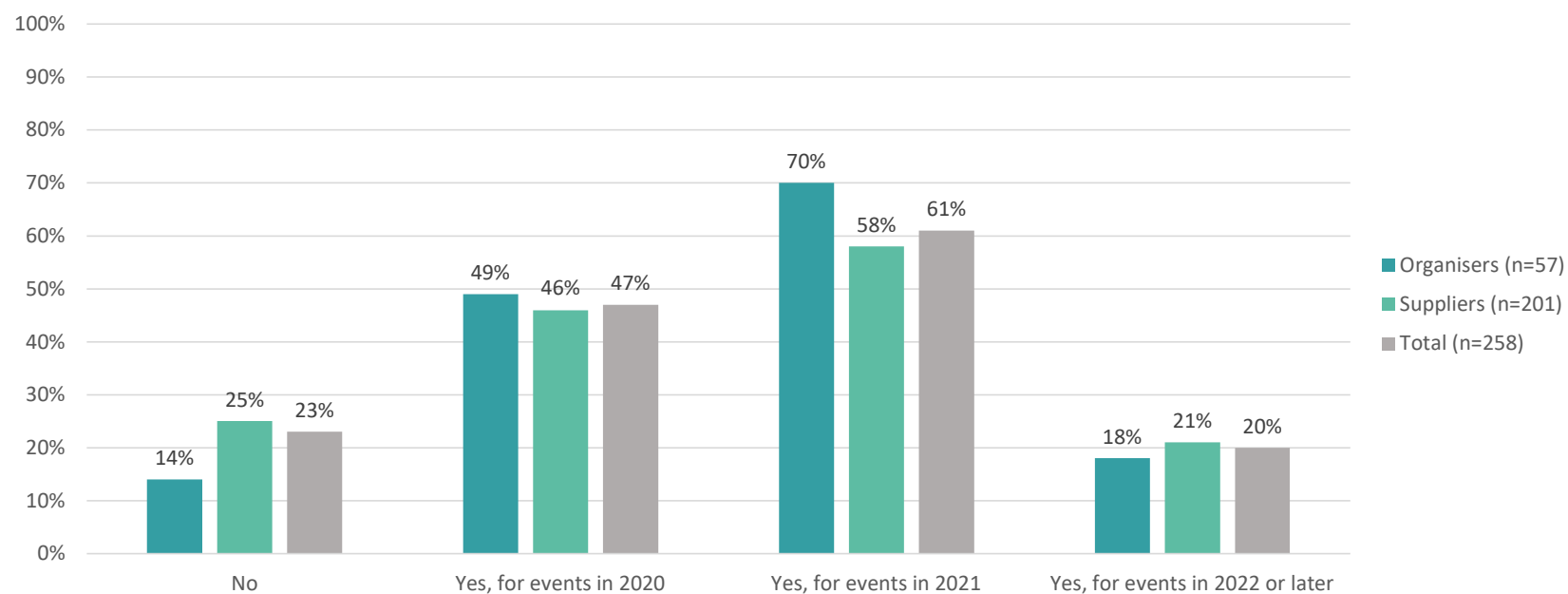
# Current activities (suppliers)

Which of the following corona-induced activities is your company/organisation currently undertaking?



# Current activities

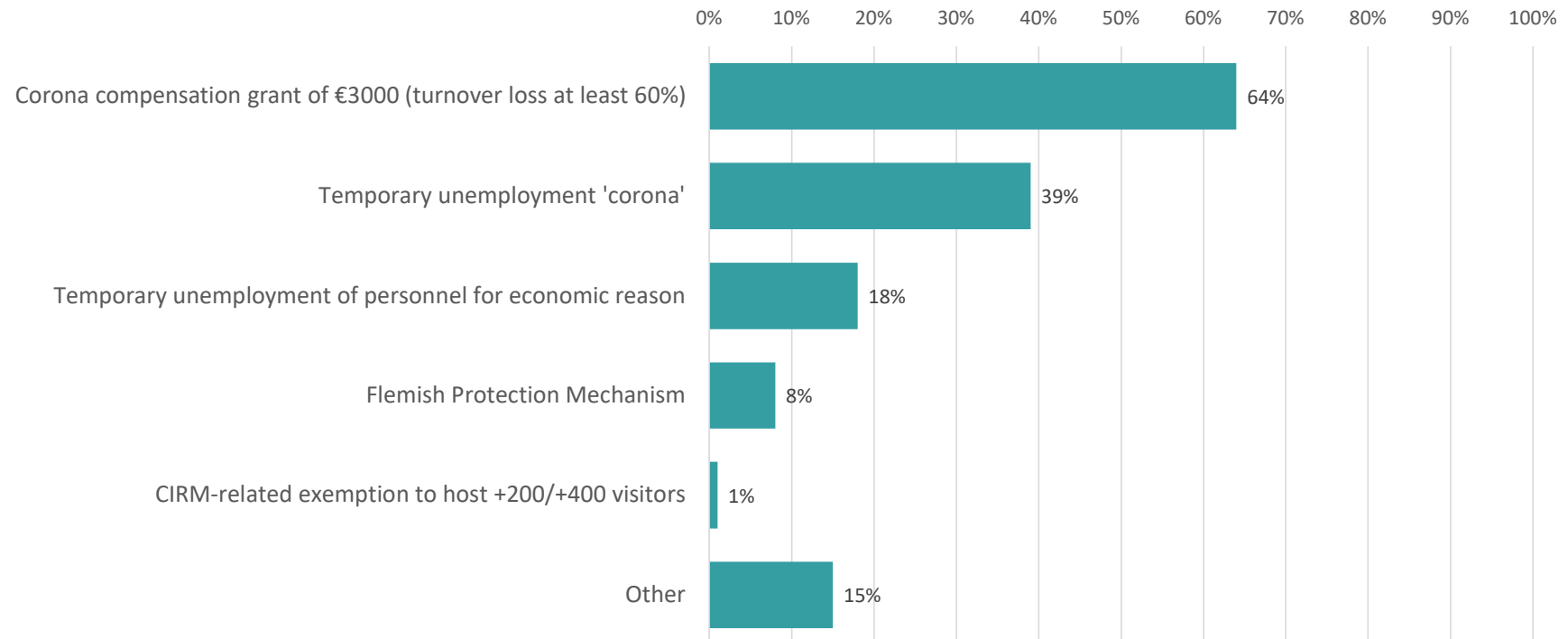
Have you, in the past few months, or are you currently involved in the organisation of and/or supplying to real-life events which will be organised later this year or after?





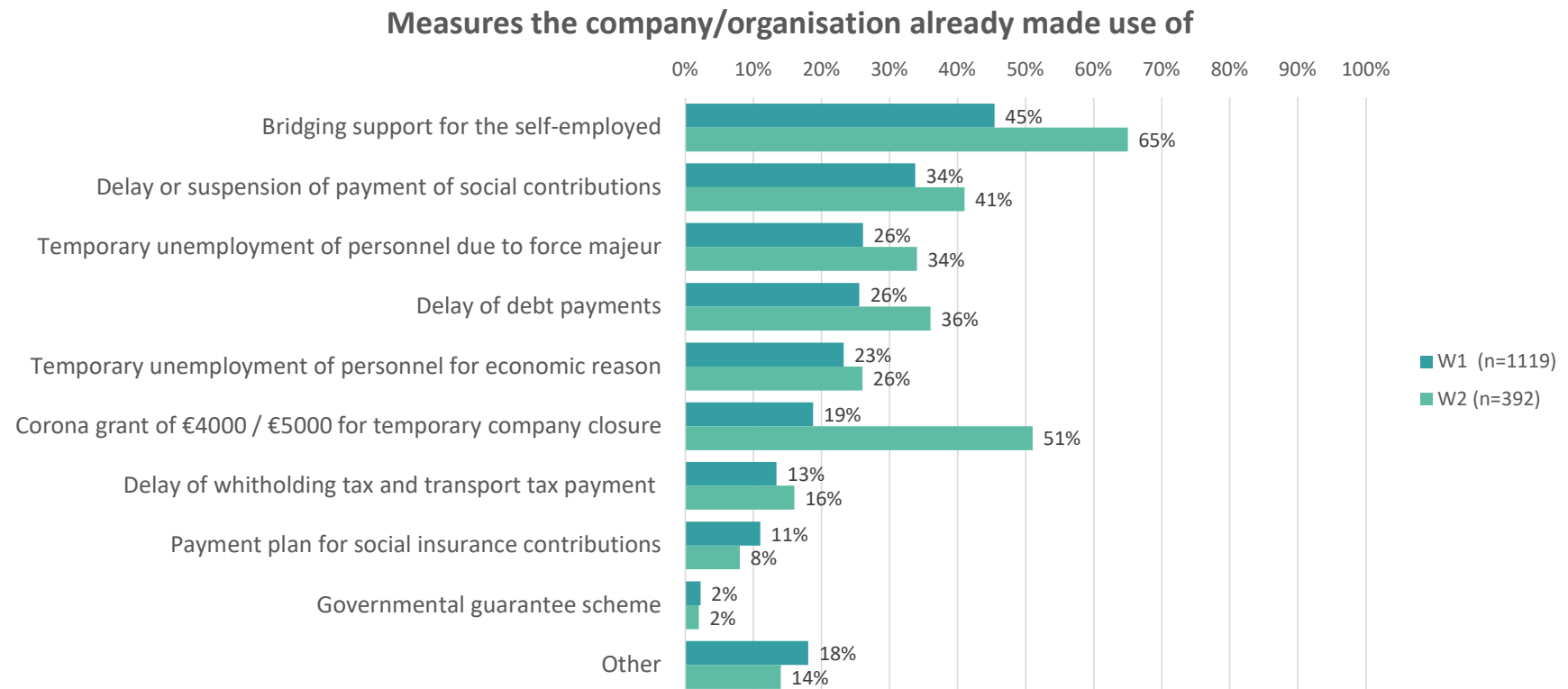
# Support measures made use of

Measures the company/organisation already made use of (n=258)





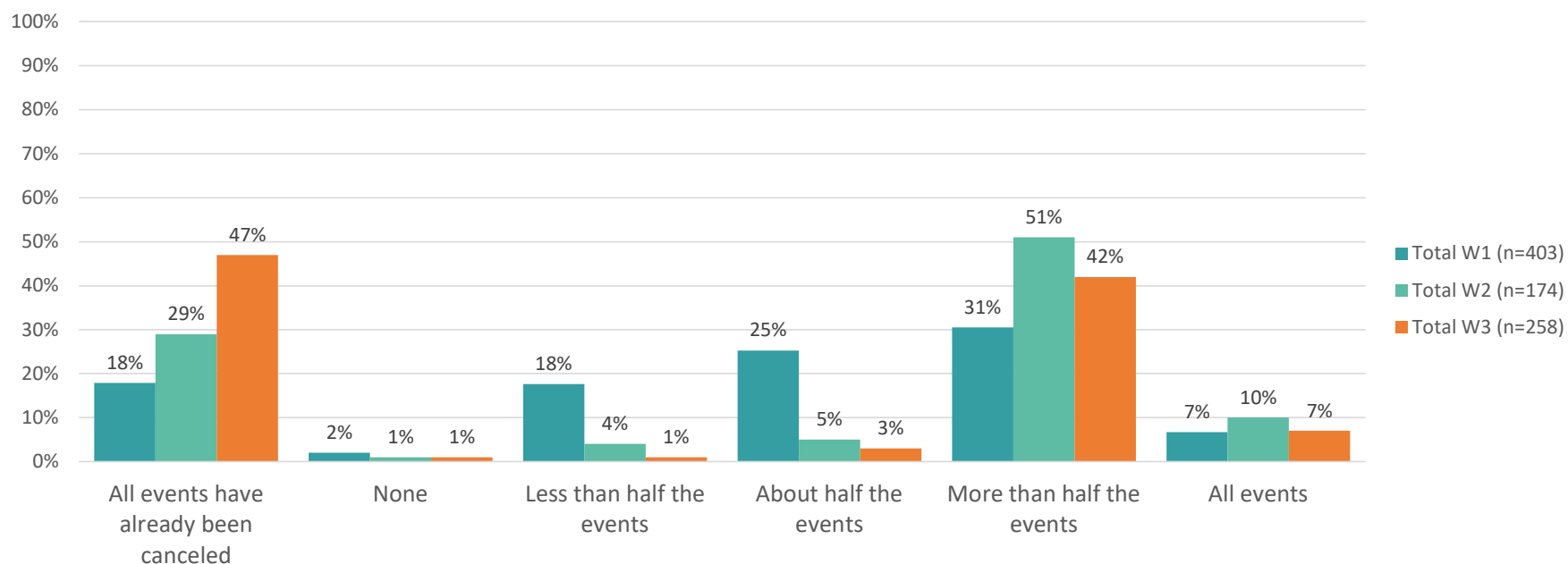
# Support measures made use of (W1 & W2 for comparison)



# Cancellations & postponements

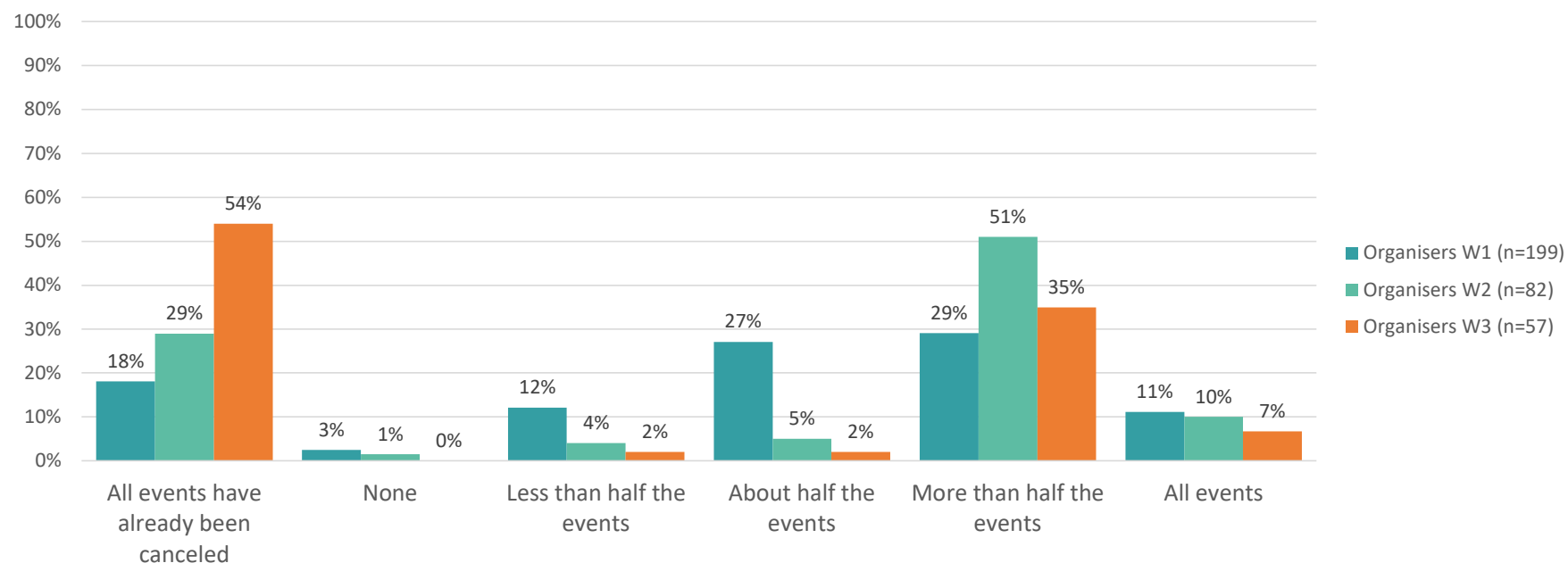
# Expected amount of cancelled/postponed events (Total)

How many events does your company/organisation expect to cancel or postpone in total in 2020?



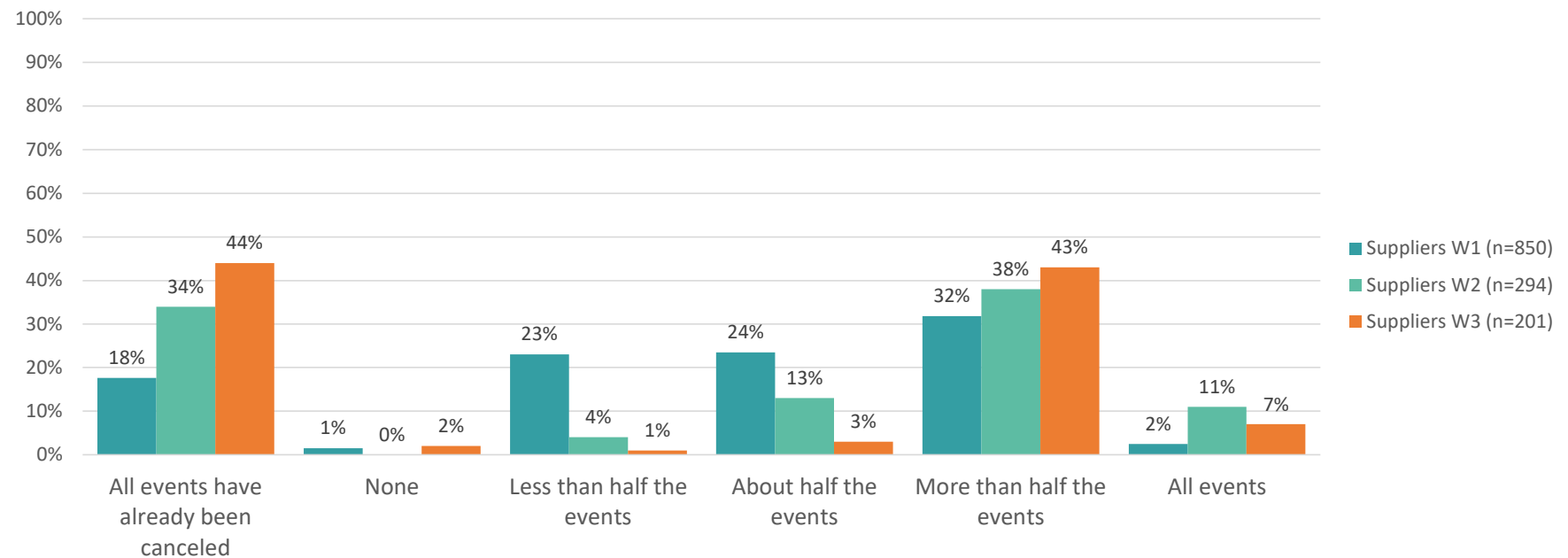
# Expected amount of cancelled/postponed events (organisers)

How many events does your company/organisation expect to cancel or postpone in total in 2020?



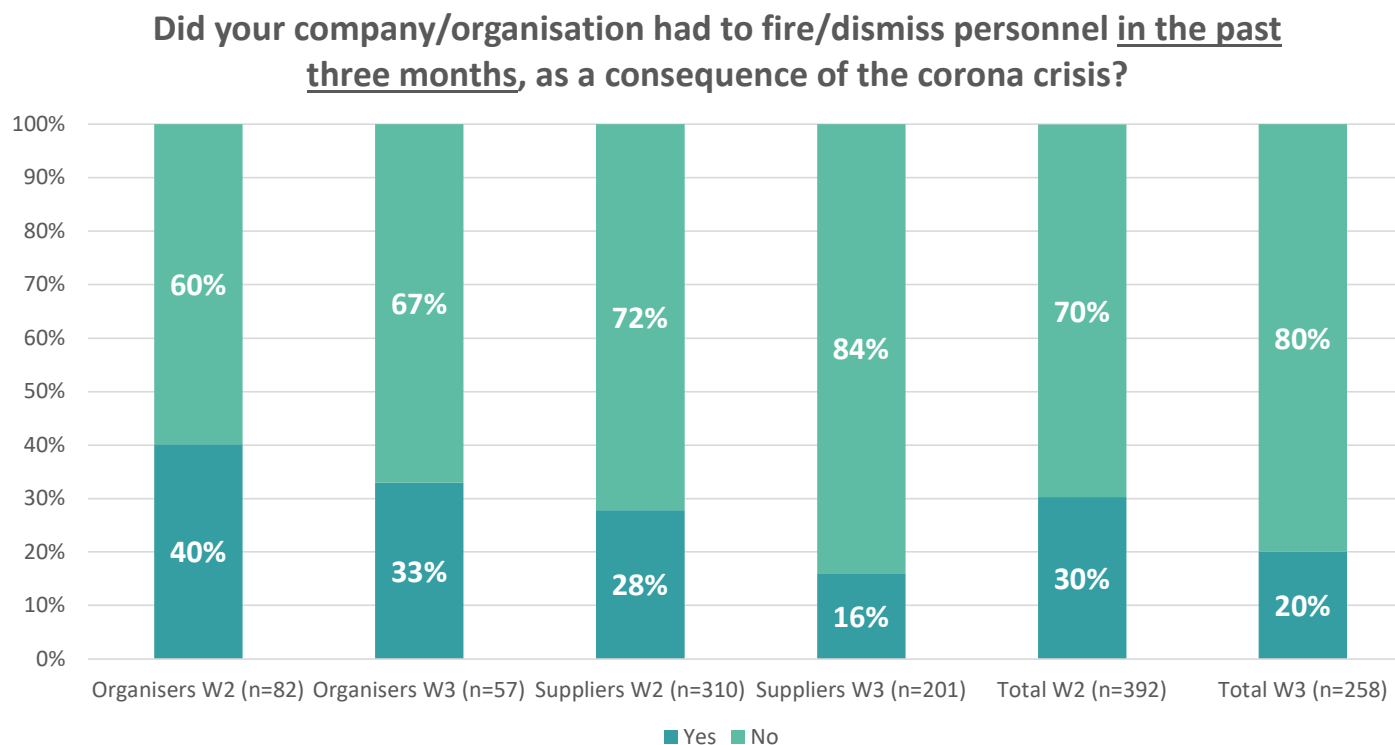
# Expected amount of cancelled/postponed events (Suppliers)

How many events does your company/organisation expect to cancel or postpone in total in 2020?



# Personnel: layoffs

# Firing/dismissing of personnel



# Firing/dismissing of personnel

Number of dismissed personnel members	Number of companies
1	15
2	7
3	8
4	10
5	3
7	2
8	1
12	1
20	1
28	1
100	1
Total	50

In the total sample, 50 companies had to let people go in the past 3 months

In the total sample, 290 personnel members were dismissed in the past three months

That is 1,1 personnel member per company/organisation in the panel

Companies who fired personnel, let go on average 5,8 personnel members

Without the outlier of 100, this comes to 3,9 personnel fired members on average



# Firing/dismissing of personnel

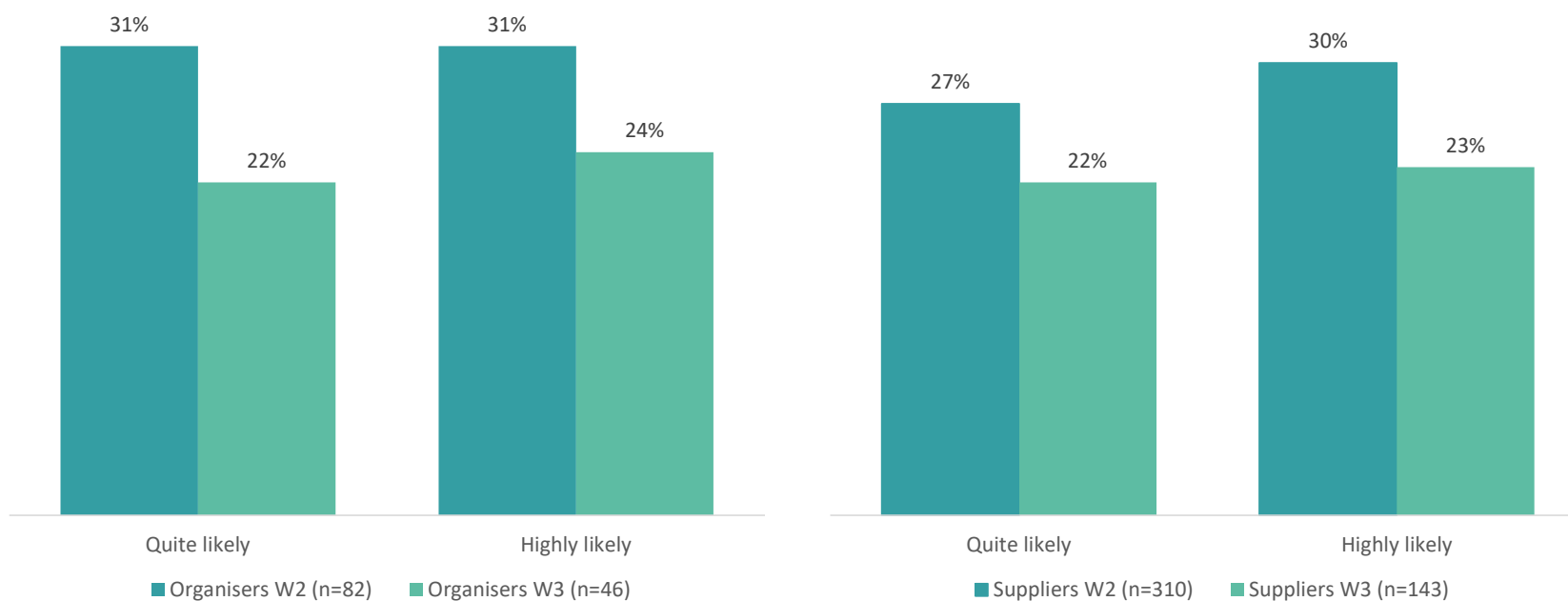
Percentage of personnel dismissed	% of companies
1% - 10%	10%
11 - 20%	14%
21 - 30%	8%
31 - 40%	20%
41 - 50%	22%
51 - 60%	4%
61 - 70%	4%
71 - 80%	2%
81 - 90%	0%
91 - 100%	16%
n	50

In the sample, one out of four companies that dismissed personnel in the past three months, had to let go more than half of their personnel

On average, 45% of personnel were dismissed in the last three months in these companies in the sample

# Future dismissal of personnel

How likely or unlikely is it that your company/organisation will have to let people go in the upcoming three months, due to the corona crisis?



# Personnel: lending & losing

# Lending out personnel

Has your company/organisation lent out (part of) your personnel to other companies/organisations for activities **unrelated to the core of your business**, due to the corona crisis?

**Organisers**  
(n=57)

**16%**

100 % lent out part of their personnel

**Suppliers**  
(n=201)

**24%**

63% lent out part of their personnel  
37% lent out all of their personnel

# Loss of personnel

Has one or more members of your personnel left your company/organisation due to the corona crisis (e.g. to improve their personal job stability)?



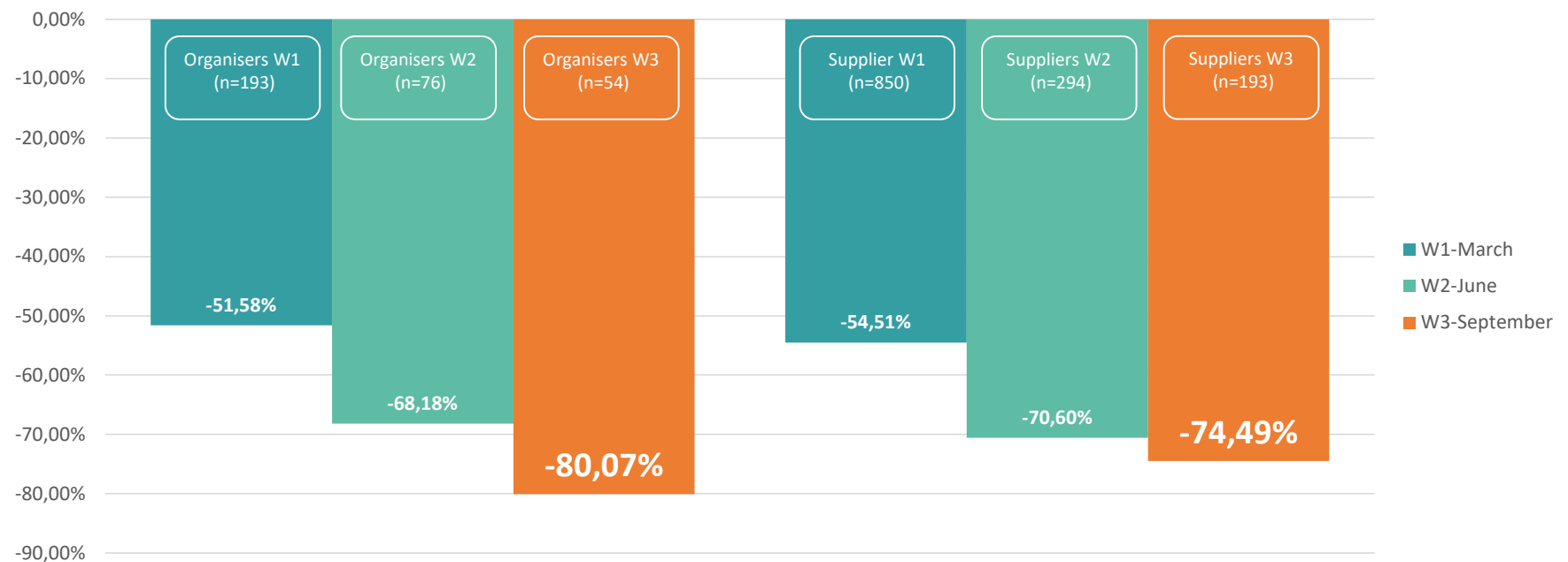
\* n smaller due to exclusion of 'don't know' & 'not applicable'



Turnover loss

# Expected % of decrease in turnover in 2020, compared to 2019

Compared to 2019, how much lower do you think your 2020 turnover (excl. VAT) will be?



## Expected turnover loss in 2020, compared to 2019 (average)

Wave 1	<b>Organisers</b> – 51,85% = € 1 893 911	<b>Suppliers</b> – 54,51% = € 1 418 164
Wave 2	<b>Organisers</b> – 68,18% = € 2 490 392	<b>Suppliers</b> – 70,60% = € 1 836 771
Wave 3	<b>Organisers</b> – 80,07% = € 2 924 695	<b>Suppliers</b> – 74,49% = € 1 937 976
	<b>Average 2019 turnover = € 3 652 673</b>	<b>Average 2019 turnover = € 2 601 659</b>



## Expected turnover loss in 2020, compared to 2019 (average)

Wave 1	<b>Organisers</b>  – 51,85% = € 1 893 911	<b>Suppliers</b>  – 54,51% = € 1 418 164
Wave 2	<b>Organisers</b>  – 68,18% = € 2 490 392	<b>Suppliers</b>  – 70,60% = € 1 836 771
Wave 3	<b>Organisers</b>  – 80,07% = € 2 924 695	<b>Suppliers</b>  – 74,49% = € 1 937 976

For reasons of comparison, 2019 turnover averages assessed in W1 are used for W2 and W3 in the calculation and those on the following two slides.

## Expected turnover loss organisers in 2020, compared to 2019 (extrapolation)

### Organisers (wave 1)

€ 1 893 911

\*

(3222\*0,21)

=

€ 1 282 177 747

### Organisers (wave 2)

€ 2 490 392

\*

(3222\*0,21)

=

€ 1 685 049 035

### Organisers (wave 3)

€ 2 924 695

\*

(3222\*0,21)

=

€ 1 978 907 131

Event sector = 3222 companies/organisations  
21% organisers – 79% suppliers

## Expected turnover loss suppliers in 2020, compared to 2019 (extrapolation)

### Suppliers (wave 1)

$$\begin{aligned} &€ 1\,418\,164 \\ &\quad * \\ &(3222 * 0,79) \\ &\quad = \\ &€ 3\,609\,227\,380 \end{aligned}$$

### Suppliers (wave 2)

$$\begin{aligned} &€ 1\,836\,771 \\ &\quad * \\ &(3222 * 0,79) \\ &\quad = \\ &€ 4\,675\,280\,168 \end{aligned}$$

### Suppliers (wave 3)

$$\begin{aligned} &€ 1\,937\,976 \\ &\quad * \\ &(3222 * 0,79) \\ &\quad = \\ &€ 4\,932\,885\,351 \end{aligned}$$

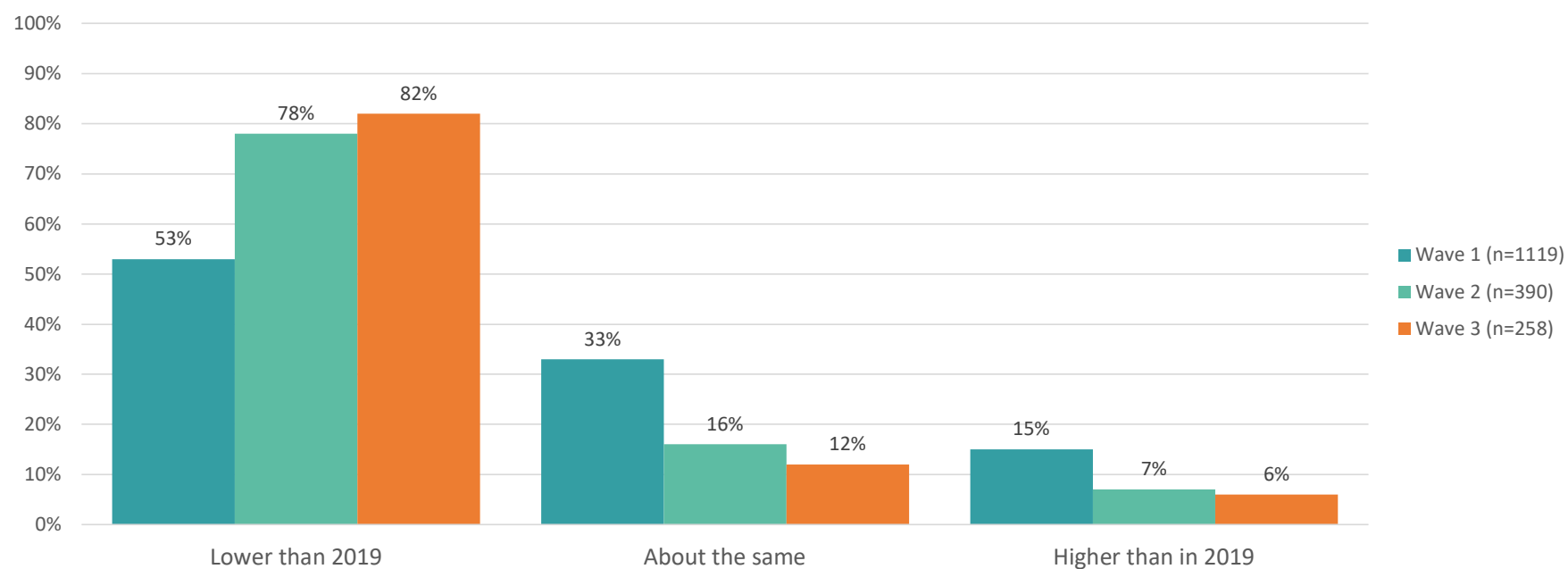
Event sector = 3222 companies/organisations  
21% organisers – 79% suppliers

An aerial photograph of a large crowd of people walking on a plaza with large, colorful geometric tiles in shades of green, red, and grey. A large black rectangular box is overlaid on the left side of the image, containing the text 'The future' in white.

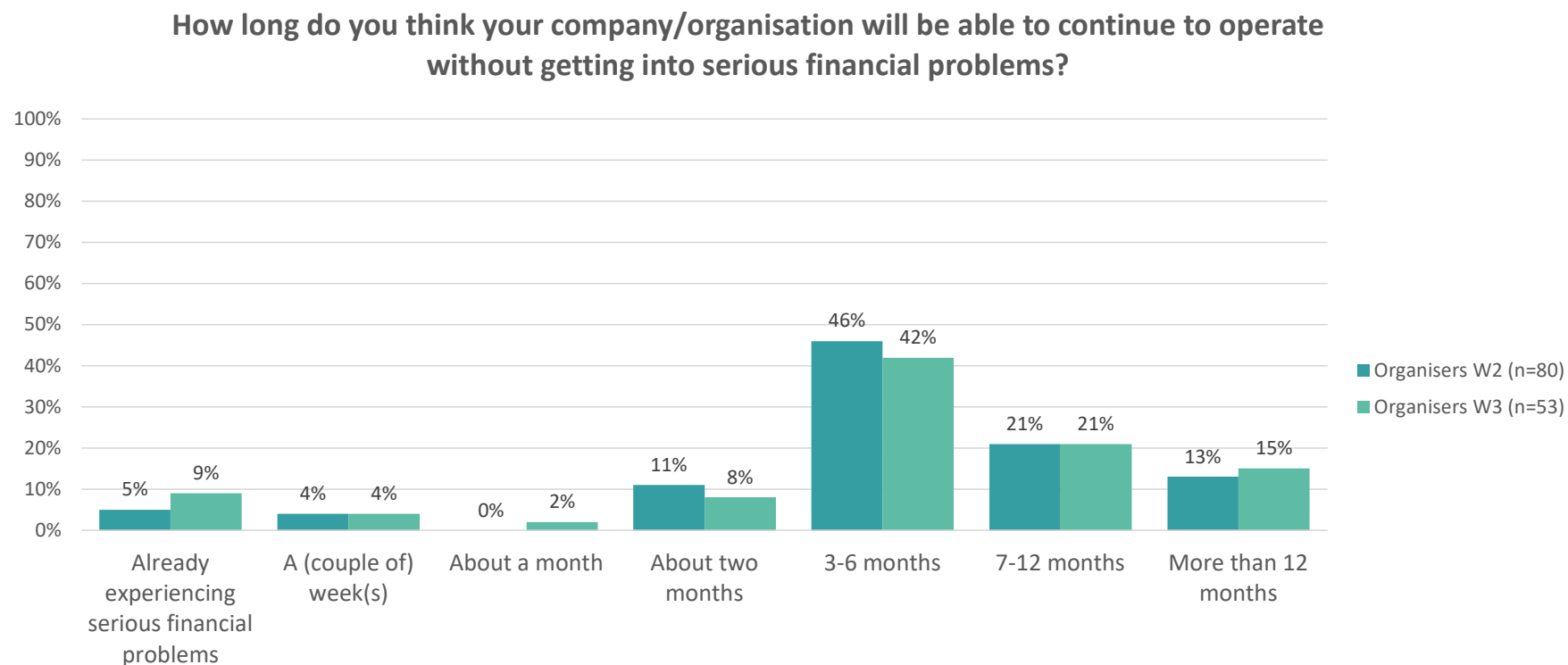
The future

# Turnover 2019 versus 2021

What are your expectations for next year's turnover (2021) of your company/organisation, compared to last year's (2019)?

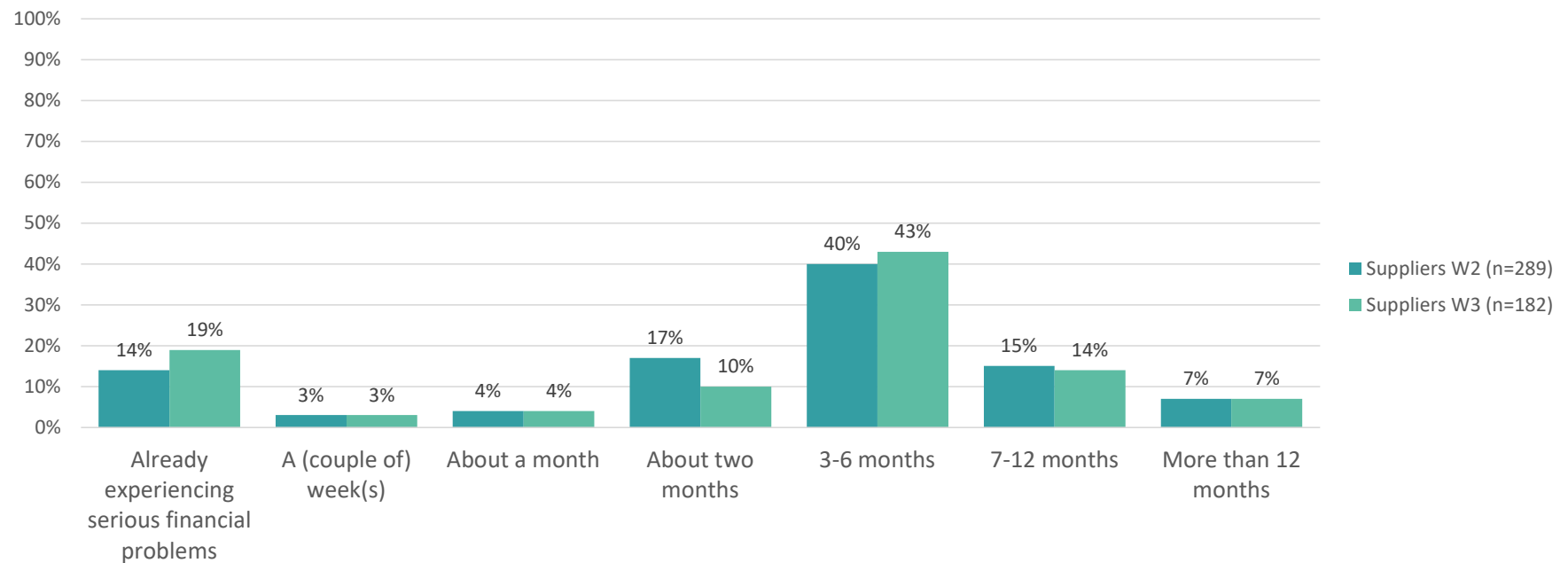


# Financial problems (organisers)



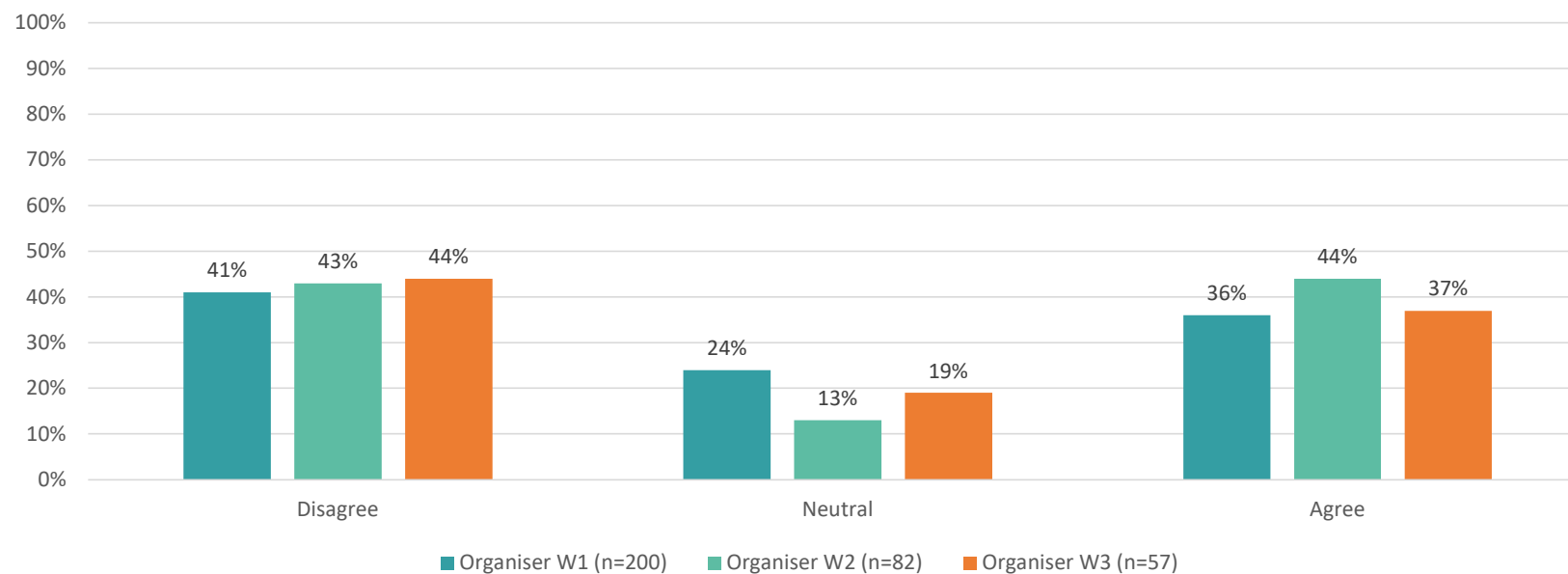
# Financial problems (suppliers)

How long do you think your company/organisation will be able to continue to operate without getting into serious financial problems?



# Survival (1) (Organisers)

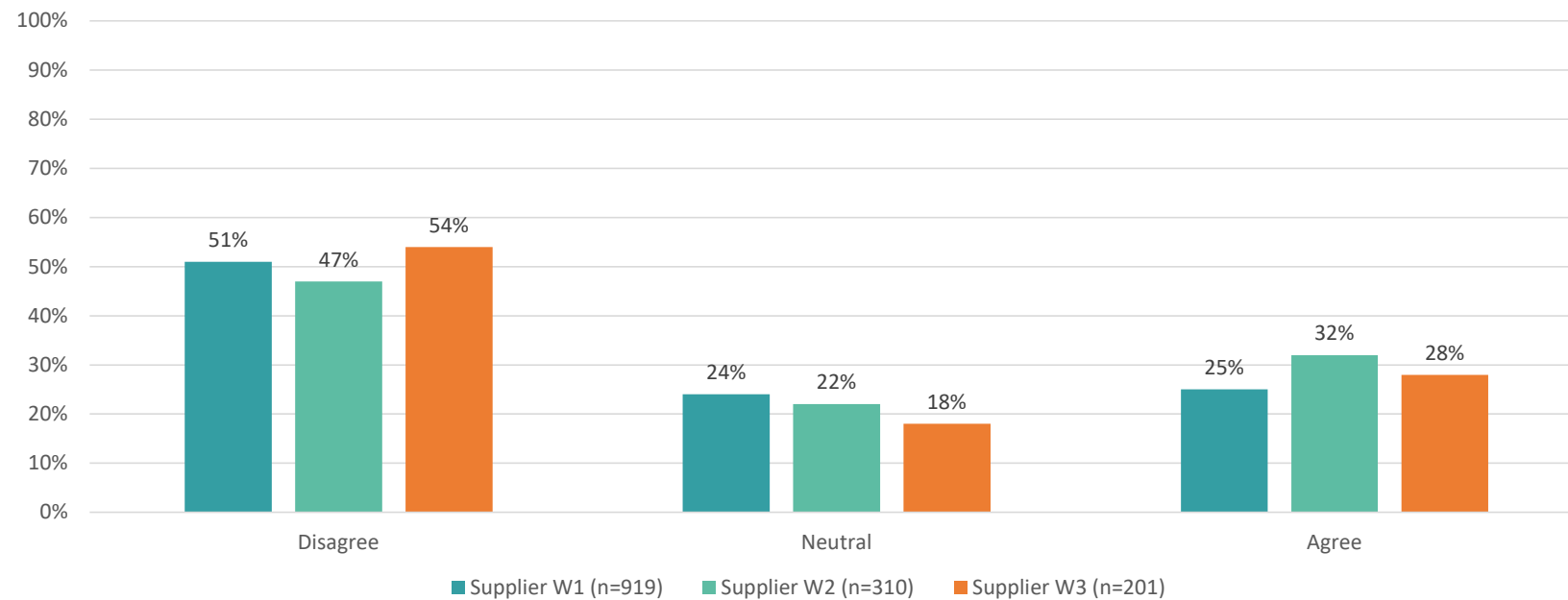
I am confident that our company/organisation has sufficient reserves available to get through this crisis





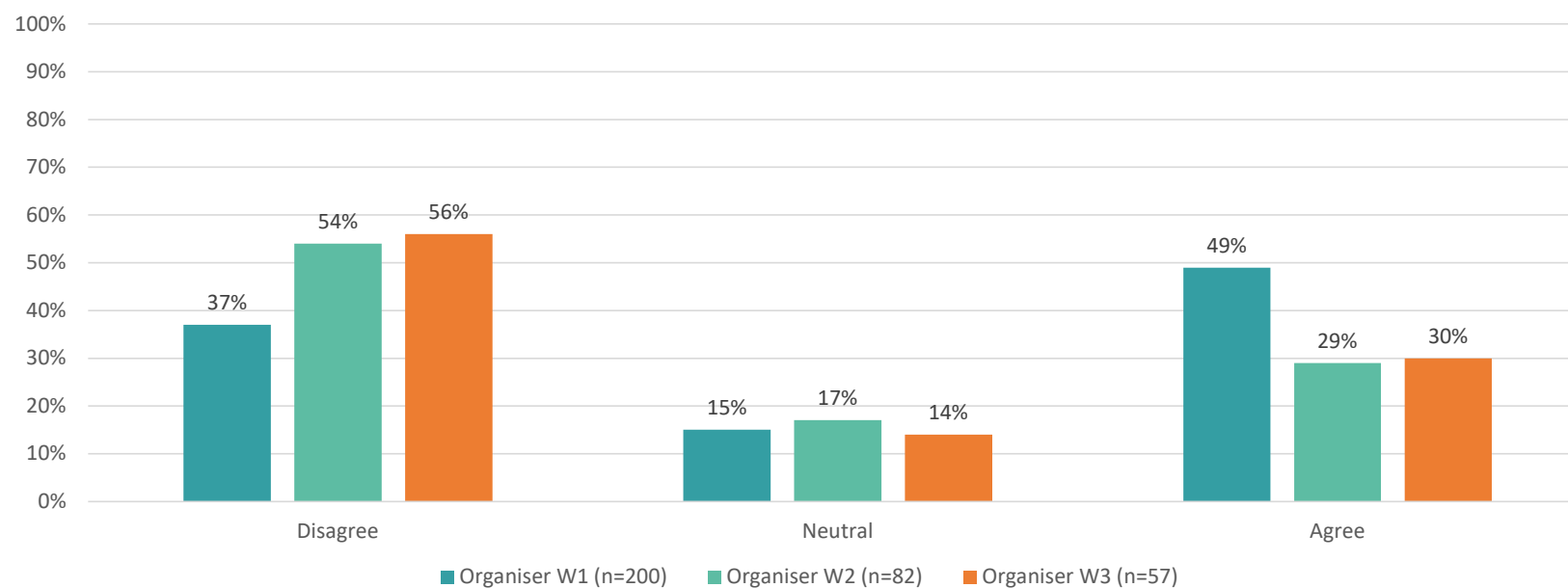
# Survival (1) (Suppliers)

I am confident that our company/organisation has sufficient reserves available to get through this crisis



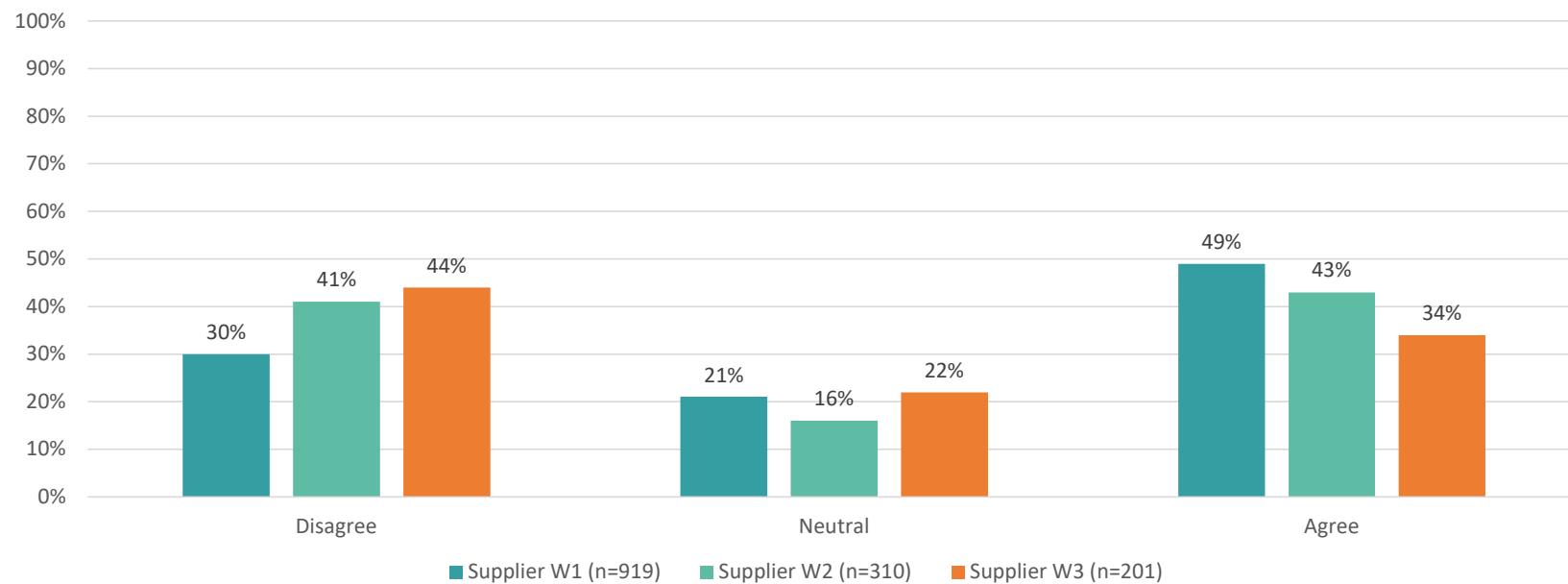
# Survival (2) (Organisers)

I am worried that my company/organisation won't survive until the end of this year

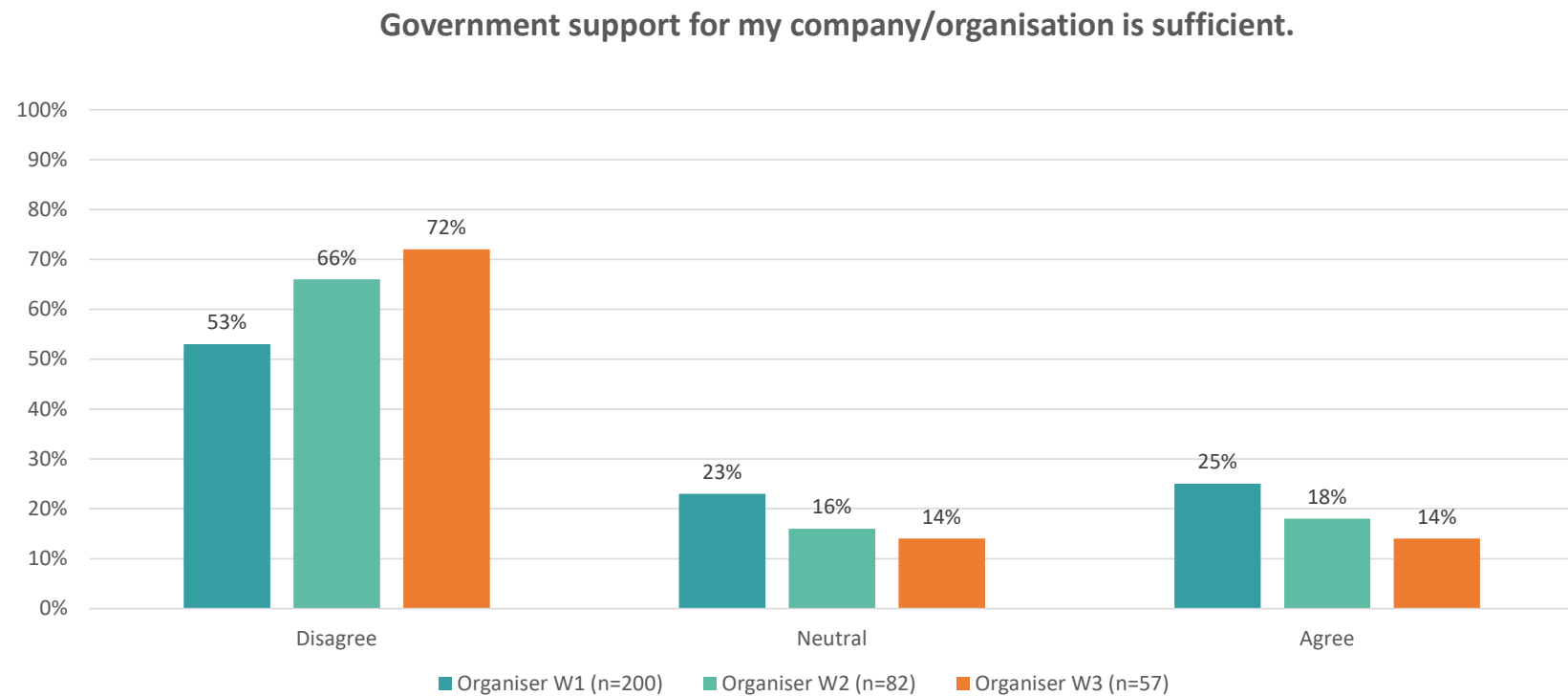


# Survival (2) (Suppliers)

I am worried that my company/organisation won't survive until the end of this year

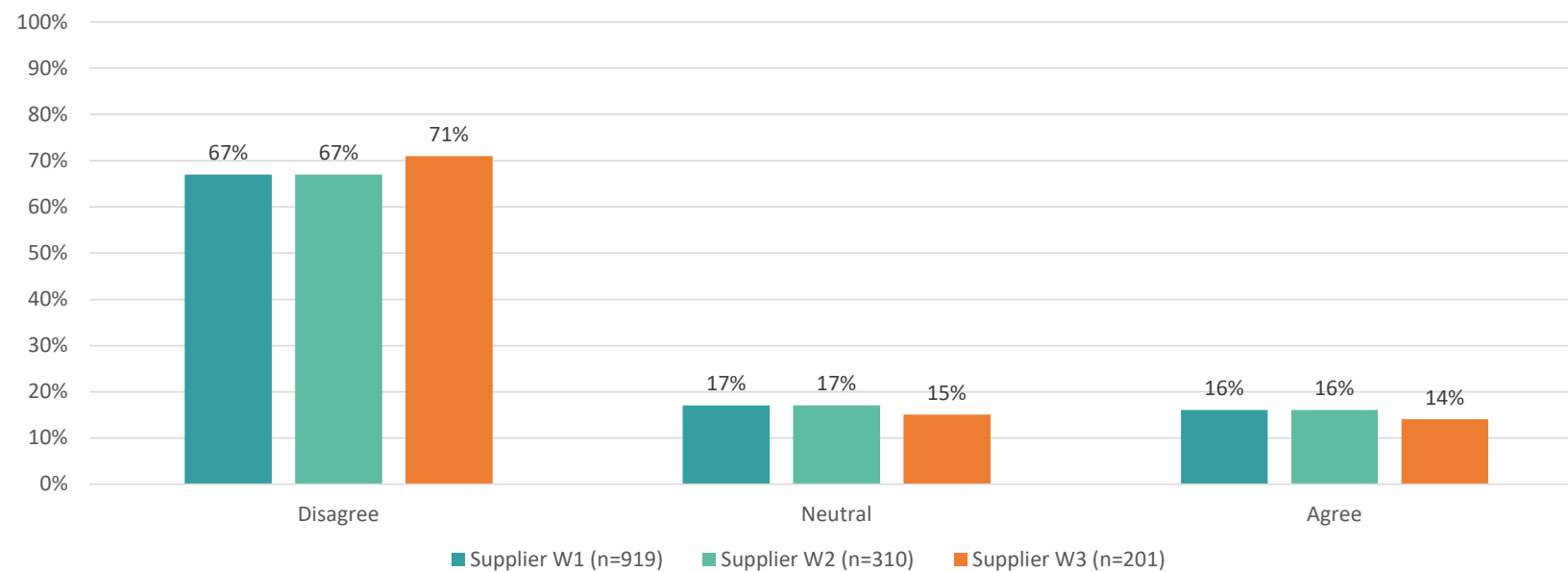


# Survival (3) (Organisers)



# Survival (3) (Suppliers)

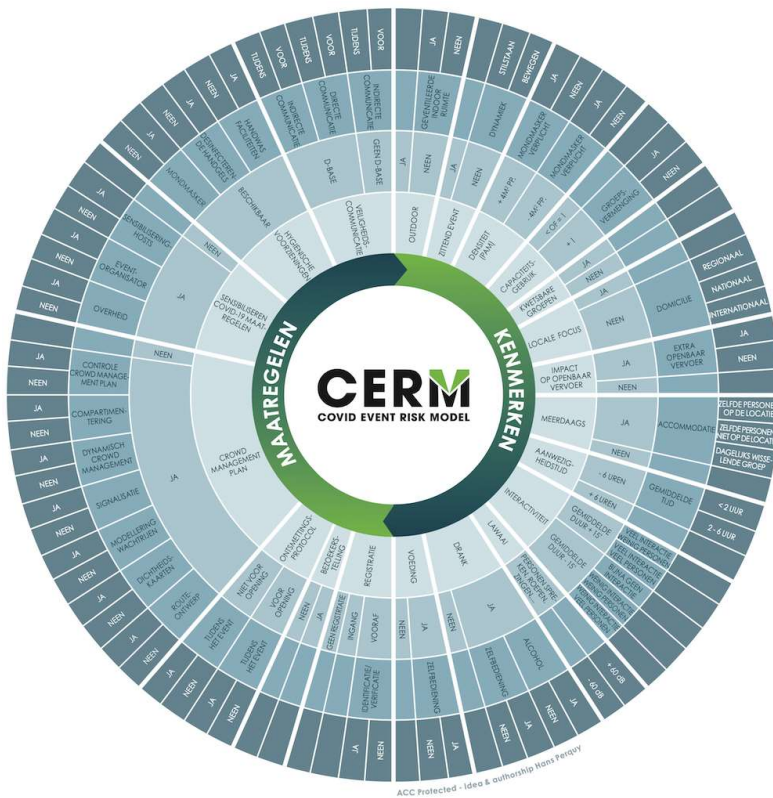
Government support for my company/organisation is sufficient.



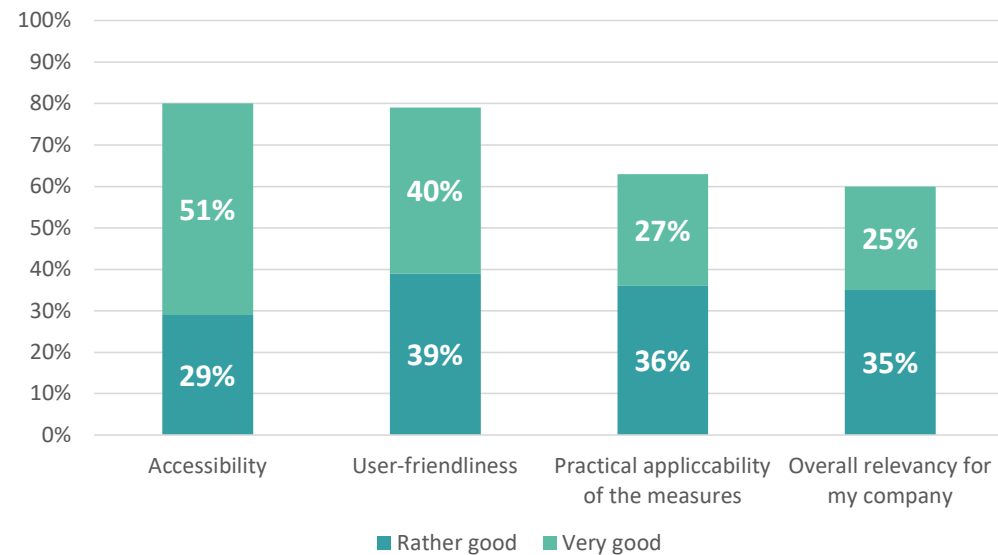




# Evaluation of CERM



How would you evaluate CERM on the following topics? (n=183)





An aerial photograph of a large, open public space, likely a plaza or park. The ground is paved with large, colorful geometric tiles in shades of green, blue, and red. A large crowd of people is walking across the plaza, their small figures scattered across the colorful surface. A large, solid black rectangular area is overlaid on the left side of the image, containing the text 'Other insights' in white.

# Other insights

# Interest in information, insights, workshops or webinars on...

	Organisers (n=57)	Suppliers (n=201)
...further trends & innovations for the events sector	84%	81%
...futureproofing of the events sector	83%	82%
...new business models post-corona	74%	62%
...the set-up of online & hybrid events	46%	37%

# Key findings

3

# Layoffs

- **1 in 3 of all organisers** and more than **1 in 6 of all suppliers** have had to let people go in the past three months due to Corona crisis
- this adds up to an even more serious previous wave of layoffs in the period between March and June
- on average between 4 and 6 personnel members were dismissed
- these layoffs represent on average **almost half of the total company personnel**
- in the next three months, layoffs are highly likely in nearly one out of four companies, regardless of their activities; in **nearly half** of them, layoffs are **quite to highly likely** in the next 3 months

# Lending & losing of personnel

- **1 in 6 of all organisers** and more than **1 in 4 of all suppliers** have **lended personnel** to companies/organisations with activities unrelated to their core business
- more than **1 in 4 organisers** and **1 in 3 suppliers** have **lost personnel** members in the past few months because of the corona crisis (for more job certainty ...)

# Expected turnover loss

## **Expected 2020 turnover loss has risen in the past three months...**

- for organisers, from 52% (March) to 68% (June) to **80%** (September)
- for suppliers, from 54% (March) to 71% (June) to **74%** (September)

## **Extrapolated to the population, this accounts for an expected 2020 turnover loss...**

- for organisers, from 1,3 Bn (March) to 1,7 Bn (June) to nearly **2,0 Bn** (September)
- for suppliers, from 3,6 Bn (March) to 4,7 Bn (June) to over **4,9 Bn** (September)



# Current activities

- **more than half of all organisers** are developing **new types of events and/or services** and are preparing the organisation of online/digital events
- **suppliers** follow with respectively 4/10 and 1/5
- still 1 in 5 organisers and nearly 1 in 3 suppliers have no activities whatsoever at this moment

# Current activities

- **about half** of all organisers and suppliers are planning **events in 2020**
- **7/10 organisers** and **6/10 suppliers** are planning **events in 2021**
- **about 1/5<sup>th</sup>** of al **organisations** are planning **events in 2022**



# Support measures

- **2 out of 3** companies has made use of the corona compensation grant
- 2 out of 5 companies makes use of temporary unemployment corona
- still 7 out of 10 companies think **government support is insufficient**

# Survival

- **1 in 3 companies are not sure to make it until the end of the year** (thus, for the next 3,5 months)
- 1 in 4 organisers and 1 in 3 suppliers are already experiencing **serious financial troubles** or expect them within two months from now
- the **future outlook is also uncertain**: 8 in 10 companies think 2021 will also be worse than 2019

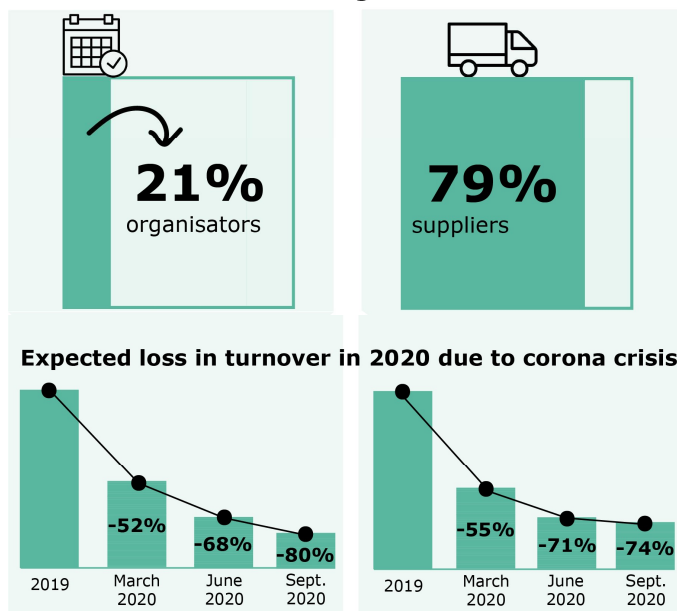
# CERM

- Over **6/10 organisers** and **3/10 suppliers** have made use of **CERM** in planning events
- **the tool is well-received**: it is easy to find and easy to use
- 6/10 support both the claim of the practical applicability of the measures mentioned in the CERM, as well as that of the overall relevance of the tool for their company; still for 4/10 this is less the case

# Summary

## Event sector in Belgium

More than 3.200 organisations active



[www.publicimpact.be](http://www.publicimpact.be)

Data based on a national survey, completed by organisations who are for more than 50% of their turnover professionally involved and/or active in the organisation of events.  
n March 2020 = 1.119; n June 2020 = 392; n September 2020 = 258

A research by the centre of expertise Public Impact of Karel de Grote Hogeschool in association with VISITFLANDERS, EventFlanders, Experience Magazine, FMIV and the Alliance of Belgian Event Federations.

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## Public Impact

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