

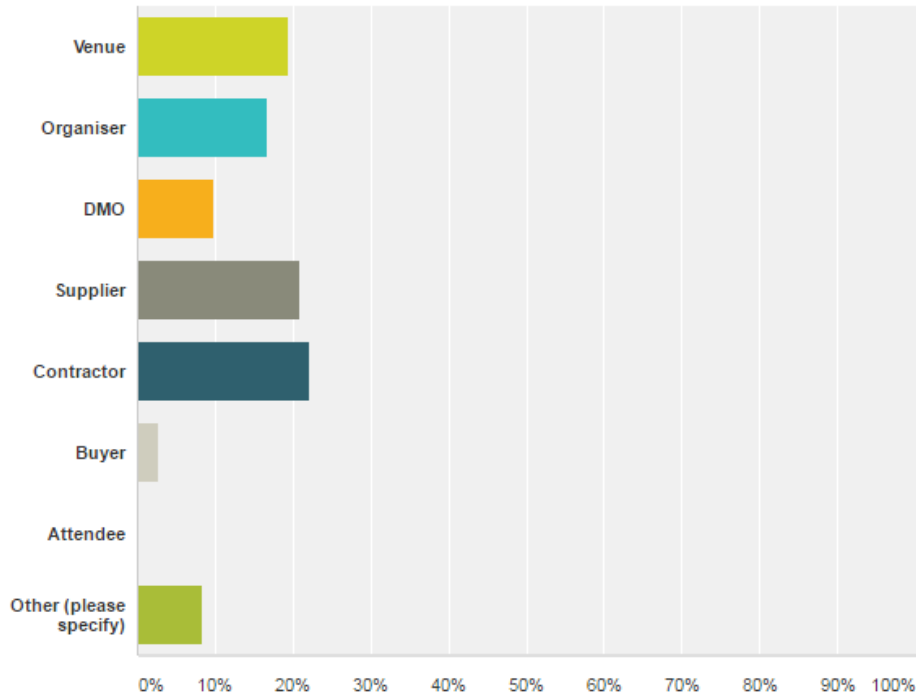


CONNECTING BRITAIN'S
EVENTS INDUSTRY

**BVEP Events Industry Referendum Impact Survey
Summer 2016**

What type of event business do you represent?

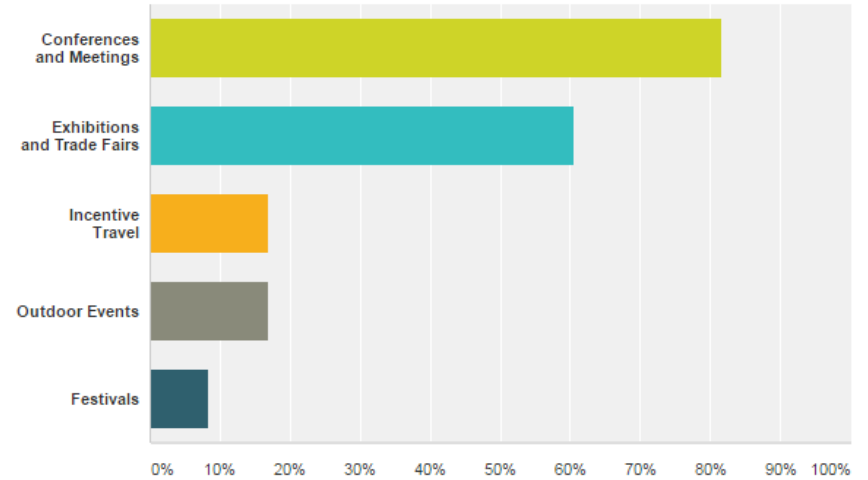
Answered: 72 Skipped: 0



Answer Choices	Responses
Venue	19.44% 14
Organiser	16.67% 12
DMO	9.72% 7
Supplier	20.83% 15
Contractor	22.22% 16
Buyer	2.78% 2
Attendee	0.00% 0
Other (please specify)	8.33% 6
Total	72

What event segment do you operate in?

Answered: 71 Skipped: 1



Answer Choices	Responses
Conferences and Meetings	81.69% 58
Exhibitions and Trade Fairs	60.56% 43
Incentive Travel	16.90% 12
Outdoor Events	16.90% 12
Festivals	8.45% 6

Total Respondents: 71

Study Visits

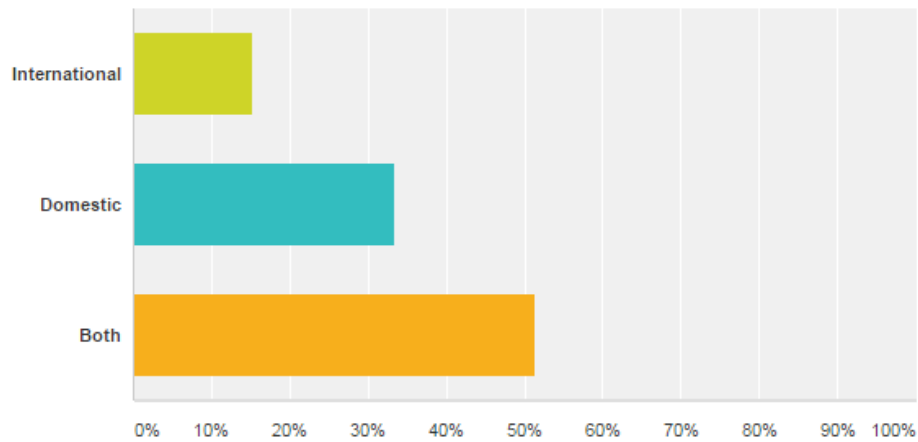
9/2/2016 9:39 PM

consumer travel

7/20/2016 2:16 PM

Is your business predominantly?

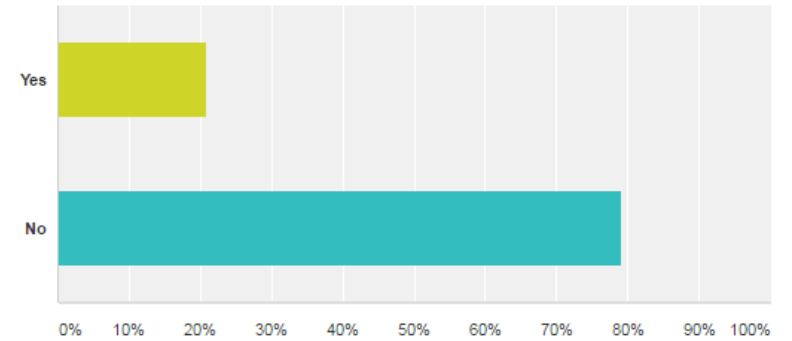
Answered: 72 Skipped: 0



Answer Choices	Responses	
International	15.28%	11
Domestic	33.33%	24
Both	51.39%	37
Total		72

Have you experienced any cancellations since the referendum?

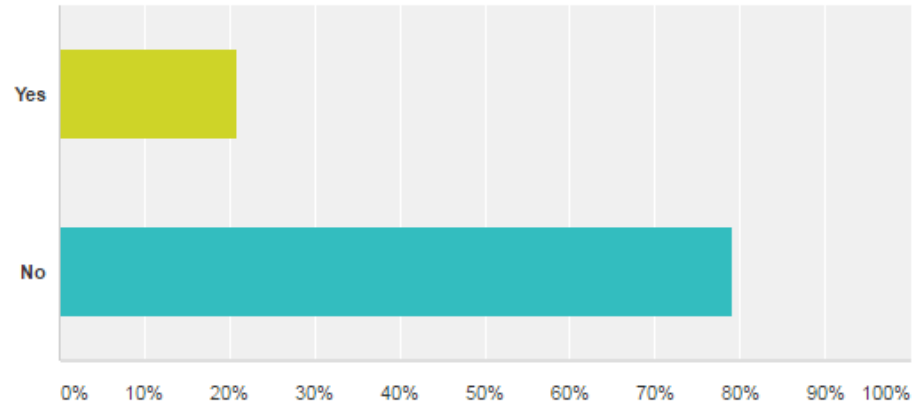
Answered: 72 Skipped: 0



Answer Choices	Responses	
Yes	20.83%	15
No	79.17%	57
Total		72

Have you experienced any potential increase in business post the referendum?

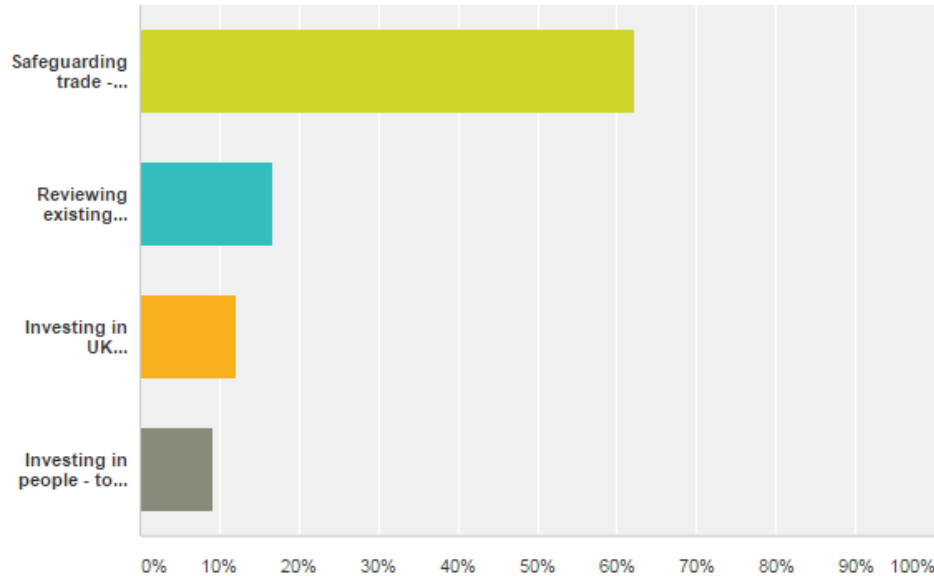
Answered: 72 Skipped: 0



Answer Choices	Responses
Yes	20.83% 15
No	79.17% 57
Total	72

From your perspective what is the key priority for the events industry to focus on following the decision to leave the EU? Please select one from below.

Answered: 66 Skipped: 6



Answer Choices	Responses
Safeguarding trade - reducing uncertainty and engaging with new markets	62.12% 41
Reviewing existing legislation - to ensure future business can be conducted efficiently	16.67% 11
Investing in UK infrastructure - to improve our competitive position in global market	12.12% 8
Investing in people - to help us manage impact of changes to foreign worker status in UK	9.09% 6
Total	66

Comments (8)

It is impossible to do anything other than carry on as normals as nobody knows what the future will look like.

9/5/2016 3:39 PM [View respondent's answers](#)

Above all protecting existing trading relationships within Europe, the USA, Japan and other existing key markets. Successive UK governments have invested in building trade in BRIC countries without these coming close to matching the value of the European, USA and other key existing trading markets

9/5/2016 2:54 PM [View respondent's answers](#)

For me it's business as usual

9/5/2016 2:33 PM [View respondent's answers](#)

Want to keep EU VAT recharge scheme

8/15/2016 8:56 AM [View respondent's answers](#)

Pro actively aqiring new markets

8/12/2016 10:19 AM [View respondent's answers](#)

None over the other - just carry on - they are all good things to be doing leaving or not

8/9/2016 2:52 PM [View respondent's answers](#)

Do we have a decision to leave the EU?As far as I know we have not started any negotiations. We have no policy to deal with the Brexit, so we do not know the answer to these questions. What are the changes to foreign workers status in the UK?

8/3/2016 3:08 PM [View respondent's answers](#)

Safeguarding trade - reducing uncertainty and engaging with new markets and re-enforcing relationships with existing markets

7/28/2016 9:26 AM [View respondent's answers](#)

What are your top three key concerns following the referendum decision to leave the EU?

PRIMARY CONCERN

- Staffing
- Travel Restrictions
- Large international clients stopping investing in UK because they decide it's not a place to plant head quarters for EU region and hence investment here declines
- Lack of funding available to local authority to put on conferences and events
- Fewer European travellers
- Lack of access to Regulators
- business going elsewhere
- Removal of UK from the Europe rotation for international conferences (long term)
- Reduction in work from international clients
- Loss of access to the single market.
- Britain has irrevocably damaged its reputation for being a modern international leader and trendsetter within the world
- resistance to embrace the opportunity
- Free movement of equipment
- That European conventions stop including the UK on their rotation patterns.
- currency fluctuations
- Re-establishing confidence
- That the government will push business to the rest of the world
- event visitor attendance
- SME access to business across EU
- I have no concerns
- General economic slow down caused by uncertainty
- Trade restrictions of doing business in Europe
- Depressed economy in UK
- Uncertainty will prevent people from making future bookings and will choose other EU countries rather than UK.
- Uncertainty prior to invoking Article 50
- research funding
- Confidence/uncertainty (although I believe this is only short term, and long term we should be fine!)
- Uncertainty leading to delayed decision making
- Potential recession
- Recession
- That leaving the EU is described as a negative - its an opportunity
- European work falling off
- Perception of UK as protectionist and unfriendly
- General economic slow down caused by uncertainty
- Impact on new & pipe line business not being placed
- collapse of exchange rate
- Domestic investment in infrastructure will slow events business in planning
- monetary exchange rate
- Price increases from suppliers coming into the UK
- Britain is less attractive to global exhibitors
- reduction in budgets or willingness to invest
- General economic instability
- Downturn in economy and recession
- Cost of overseas travel & events for UK businesses
- Employees with non UK passports
- uncertainty
- Client hesitation to spend on meetings & events
- London being perceived as unwelcoming and closed for business
- Lack of EU grant funding
- UK economy downturn and impact on trading
- Customer uncertainty resulting in loss of business
- Business confidence
- Uncertainty makes companies hold on spending which could lead to a recession
- Free movement of delegates outbound of the UK attending international events
- Economic consequences
- Cancellations of events
- Banking leaving London
- Uncertainty of visa situation for current employees
- Negative economic impact
- Local business stop or reduce organising events, like they did during the recession (this certainly affected Scotland)
- Cost of holding meetings outside of UK - exchange rate
- Impact of adverse exchange rate fluctuations
- Budgetary cuts impacting sales & survival
- Loss of experienced and good staff in hospitality industry
- Relocation of key European repeat events away from UK
- Labour supply
- Negative commentary

What are your top three key concerns following the referendum decision to leave the EU?

SECONDARY CONCERN

- Servicing EU business from the UK
- Exchange Rate
- Talent from Europe decided not to come here - a more caustic environment with racial slant is already steering some people to consider leaving or not moving to UK
- Fewer staff available
- New UK Regulation
- budget cuts
- European destinations winning current bids as the 'safe' option
- Reduced competitive purchasing
- Large companies moving their head offices from London.
- The level of prejudice displayed during the referendum and post Brexit vote makes the UK a less appealing destination for international visitors
- failure by government to maximise potential growth
- Free movement of people
- That international associations stop choosing the UK
- Imports from EU countries
- The Pound
- Possible restrictions to trade in Europe
- exhibitor budget reduction
- funding R&D
- Impact of any EU exhibitions that the UK loses to EU venues
- Exchange rate / cost of business in Europe
- Europe HQ is London with many EU staff, we may have to relocate to another EU country
- Visa issues could cause problems for future events.
- Future funding of research and innovation previously funded by the EU
- Investment in UK companies
- Market confidence
- Talk of recession is overtaken and becomes self fulfilling
- Re-establishing confidence
- Backlash of European Corporations
- Greater cost/complexity delivering projects in EU
- Impact on future research and development grants to the academic sector which attract international conferences to be held in UK
- cost of imported goods
- Private sector will be more reserved in terms of event spend until more certainty is known
- travel restrictions
- Freedom of movement
- We will not be seen as a European contractor to the global market
- less overseas opportunities
- Political instability
- University funding
- Ease of doing business as an 'external' company
- Free movement around the EU
- More uncertainty
- Longer term negative impact on clients' businesses in turn our revenue
- UK and London being a less attractive destination for major conferences/conventions due to potential loss of freedom of movement within Europe
- Decline in the UK economy overall
- Indecision amongst conference and event bookers
- Ability to recruit labour from overseas
- reduced business activity
- US firms will look to appoint EU agency rather than UK
- Potential economic impact
- Loss of willingness any a European level to use UK companies as they are now outside the EU
- Reduction in people spending due to uncertainty
- Staff recruitment & retention
- Uncertainty of Visa requirements delegates attending events
- Fewer staff available
- Business travellers will stop coming to the UK because of the £
- Increased cost as EU workforce might have to leave
- Reduction in client budgets or decision not to commit budgets due to uncertainty
- Less interest in the UK as a business tourism destination
- Possible perception that UK is not a welcoming destination
- Reduction in budgets for events in UK as they may have to repeat the event in a European destination
- Currency devaluation
- Imposition of visa requirements within EU

What are your top three key concerns following the referendum decision to leave the EU?

TERTIARY CONCERN

- Foreign Investment
- Low exchange rate makes us uncompetitive because many services purchased in euros
- Business restrictions
- Diminished knowledge of changing EU Regulation
- bookings put on hold
- UK not carrying same weight in research areas to warrant an international congress
- Bureaucratic restriction to trading with international buyers
- Low exchange rate meaning importing goods is more expensive.
- Britain has forfeited international respect and reduced its power on the international stage
- post brexit focus is on the wrong agendas and issues
- International VAT issues - it works really well currently
- That international research partnerships with the UK stop
- split standards between UK & EU
- Transport cost
- Possible carnet hassles
- possible reduction in number of events
- changes to partnership working
- Potential for increased cost or hassle in delivering projects in Europe
- Uncertainty in short to medium term
- Challenge selling to EY from UK, depends on new trade deals
- People may think the British are racist and unwelcoming.
- Movement of goods and visas for overseas event attendees
- Trade agreements
- Competitiveness
- That business as usual is not maintained
- Strength of the Pound
- VAT refund scheme and tax changes
- UK/London (as host/venue) losing major events to EU
- Time it will take to negotiate the split and what Scotland decides to do with the negotiated deal
- price increases will cause recession
- Funding for events will fall
- exclusions
- Duty/Tax - carnets
- Extra costs crossing borders in The EU.
- Trade agreements
- Dip in research and local visitor economy funding
- Unemployment increase in UK
- Rural development grants
- Even more uncertainty
- General slow down of UK economy
- Uncertainty following Brexit causing low business confidence resulting in companies halting meeting & event plans due to either cost savings or staffing fears
- UK perceived as less a global player in events industry
- lack of confidence in UK businesses
- Lack of investment in the business infrastructure from overseas investors
- reputation of the UK globally
- Cut backs usually result in less on event spend
- Lack of investment into UK venues
- Freedom of movement of goods and services.
- long term potential of economic downturn
- Negative affects of increased racial discrimination reports being shown in the media post the referendum.
- Reputational standing of UK
- Inbound business reducing or stopping
- Perception of British people as racist/isolationist
- Additional administration resulting from changing legislation may impact staff productivity and increase overhead cost
- Lower investment
- Access of UK airlines to open skies
- Shifting of company head offices away from UK reducing demand and resulting in job losses
- Closed markets
- Currency stability

What existing EU legislation or arrangements that impact on your business would you want removed in the exit negotiations?

- None, most legislation provides a level playing field and makes trading across region easier.
- EU legislation in relation to procurement of suppliers for events, OJEU if over financial threshold
- None
- None - they do not present a problem for my business or the businesses I work with.
- cross border barriers and restrictions for debt recovery.
- I was very happy with the way things were - there are zero impediments to what we do across Europe
- None
- working hours directives
- no specific legislation
- Most of them
- EU employment law and rights
- None
- CDM, Working time directive. Perhaps not removed - but at least reviewed!
- Anything that restricts trade or travel of EU passport holders
- Foreignly owned companies should not be allowed to bid for contracts in the UK. UK owned business should have the exclusive of the UK market. No foreign workers should be allowed to work in the UK. Once this is achieved, we should make sure that we are seen as progressive, open to business and friendly towards the rest of the world. (!)
- Employment Law/Rights
- The right to work in the UK without a Visa and validation
- Single Market competition from cheap European Companies undermining the UK industry quality
- working hours & over complicated H&S
- Nothing. It takes the same paperwork to transport and build an exhibit in the 27states of the EU as it does to exhibit at the NEC
- Working Time Directive
- State Aid
- TOMS
- Make staying at a UK Hotel more attractive to both UK and Inbound consumers and companies
- OJEU contractual covenants
- None
- VAT reclaim
- TOMS
- None
- TOMS Working Time Directive

What existing EU legislation or arrangements that impact on your business would you want to retain?

- All current legislation seems to aid not hinder trading.
- It all
- No VAT, free movement of staff
- Freedom of movement of labor
- ease of movement within the EU
- Free movement of equipment (ie the single market) and free movement of people are both vital - if we have to do Carnets like we do into Switzerland it will be very difficult and we may have to site our warehouse elsewhere. On the people, we have 80 full time employees and 150 freelancers. 80% of our work is in mainland Europe
- Ease of access and travel between EU countries
- Ease of import/export
- None
- Almost none
- free movement between countries
- Few of them
- Free market access and free movement
- Import / export restrictions. A system with arrangements such as with Switzerland would prove to be a huge disincentive for UK firms doing business in Europe. UK firms would overlook UK suppliers and go straight to Europe to source their services.
- All
- Free movement of goods and services.
- Free trade, and movement of people (so we can still travel to shows in Europe)
- EU Vat recharge scheme Free trade generally
- Free trade with European partners. Free movement for incoming business from Europe.
- Post Brexit, how do you expect to cherry pick what rules you like and what rules you scrap?
- Free Movement
- Free trade and movement of goods in Europe
- Funding level for events currently found from the EU pot maintained by UK government or lottery.
- Everything
- Rural development grants
- Freedom of movement, technical standards, health & safety legislation, working time directive, human rights, consistency of approach across continent.
- Not knowledgeable enough to answer
- Employment legislation
- Freedom of movement
- not sure
- The free movement of people
- Co-operation with Europe Employment Protection Sustainability and Ethical protection
- Health & safety / risk assessment of events - I totally agree with them, however we could perhaps review them to ensure they are realistic. I also think it should be a "requirement" for all events - large/small/indoors/outdoors to provide one and I think that venues specifically need to be more aware of their need.
- Freedom of movement and employment
- Reverse charging of VAT EU carnets
- Free movement of labour
- Movement of people / skilled workers (including hospitality as a designated skill set); ERASMUS funded placements;
- Ability to recruit European staff without too much hassle
- Employment and worker rights
- No need for Visa's for UK residents in EU

What are the main opportunities that you've identified since the EU referendum result?

- In theory we are more competitive to American companies with strong dollar but given a lot of work is in Europe, we have to convert pounds to euros and that can and has eroded some margins.
- Additional conferences events due to projects that are working with SMEs in relation to barriers and challenges in relation to competitiveness
- Low £ attracts more European travellers
- as we need to negotiate with countries and trade partners directly possible more events held in the UK
- Currently none
- None.
- It is far to early to identify key opportunities that have any meaning. Britain voted for Brexit but Brexit was not defined and so no one knows what it means. The most important area is to explore restoring strong trading relationships with the Commonwealth as a first step.
- None. There has been a lot of panic about something that hasn't happened. In future, I cannot understand why people are panicking; we already do business inside and outside the EU. It all works as it should.
- potential to highlight and manage the strength of UK industry better to a global customer network.
- None that we don't already have - we work globally already. I cannot see how Brexit offers any more than we already have. It was a totally idiotic vote.
- None
- worldwide trade deals are now possible without the total indecision gripping the EU
- exchange rate benefit to international clients
- The opportunity to feel British again!
- We consider ourselves in a stronger position that many rivals therefore potentially able to pick up any business from those unable to withstand the impact.
- None! Has only made doing business in Europe harder
- Weak pound means delegates are spending more!
- Reduced value of the £ improves our competitiveness for overseas organisers.
- Long term - will be easier to trade internationally (assuming we can make effective trade deals with non-Eu countries)
- Nothing specific
- 1. Increase in government meetings (location) 2. Increase in foreign spent (low pound, economy) 3. Stronger domestic business (more inclined to stay in the UK)
- The UK is cheaper and therefore more competitive. If the country falls in depression we might be the only industry to benefit from the crisis.
- Likelihood of opportunity as impact may sink weaker players
- Greater collaboration with key stake holders and the business tourism sector
- Nothing, we import from Europe and pay in Euro's a total disaster for our business opening the door further for Chinese copies
- None
- the rest of the world
- With a weaker pound we are more competitive again within mainland Europe
- UK is a very cost effective destination for Europe and US - we should exploit that for the benefit of our economy
- Business as usual
- None
- Meetings for clients around the topic of Brexit.
- Potential to build new networks outside of the European Union. Potential influx of tourists due to a weak pound London stronger together! 'London is open' campaign led by the Mayor.
- inbound staycation
- Promoting the UK as better value than ever before to attract overseas customers
- excitement about trading more globally rather than looking for the easier option of trading domestically and Europe
- Perhaps more incoming business as the pound is weaker
- A considerable number of customers are now looking to host events within the UK, rather than looking outbound to Europe
- None to date.
- the pound changing
- UEA and US market demand increasing
- the weaker pound will make the UK a little cheaper for those that previously saw us as too expensive for events.
- Decrease in value of £ has attracted increased bookings from EU countries
- Improved value for money offered to US clients due to exchange rate changes.
- We're looking at growing quicker in the US market to capitalise on the weak £ versus USD\$
- Weak pound makes travel cheaper
- Redundancies
- Currency devaluation