

Business Visits & Events Partnership
BVEP Events Industry Referendum Response
October 2016

The Business Visits & Events Partnership is an umbrella organisation representing leading trade and professional organisations, government agencies and other significant influencers in the business visits and events sector.

The BVEP exists to:

- garner the cohesive opinion of these stakeholders and to collectively influence and develop policies, practices and strategies that support and generate growth in the sector and,
- Raise sector awareness through clear communications of the social and economic benefits of the business visits and events sector.

The Partnership seeks to provide a cohesive point of view for the entire business visits and events sector. The BVEP works with prominent sector leaders including its partners, government departments and agencies to influence and develop policies and practices favourable to the growth of business events, and trade and creative enterprise through business visits and events.

It has the support of the leading trade and professional organisations and government agencies with a shared interest in the economic benefit and growth of conferences, meetings, exhibitions, trade fairs, incentive travel, corporate hospitality, ceremonies, as well as other business, sporting, cultural and festival events.

A list of member organisations is included as Appendix 1.

1. Introduction

The paper sets out both the results of the BVEP Events Industry Referendum Impact Survey which has been conducted over the summer of 2016 and based on those results identifies some of the key priorities that have been identified by the industry for consideration during the EU exit negotiations.

Reference will be made to work undertaken by other trade associations working in the tourism and hospitality sector, as business visits form a significant element of the total value of the broader tourism industry. In addition there are specific issues that relate to the design, management and delivery of the wide range of events, meetings and conferences that BVEP partner organisations are responsible for.

2. BVEP Events Referendum Impact Survey – Summer 2016

A copy of the full survey results is included as Appendix 2.

In summary the survey conducted amongst BVEP partner organisations saw responses from a broad range of businesses in the industry, with venues, suppliers and contractors forming the majority of those that took part. Over 80% of respondents worked in conference and meetings, with some 60% working in exhibitions and trade fairs. It is worth noting that the range and diversity of business in this industry means that we also captured responses from incentive travel businesses, outdoor event and festival organisers.

The majority of those that took part (over 50%) identified themselves as businesses that work in both the domestic and international markets. In terms of immediate impact following the referendum 20% reported cancellations with the balance reporting that no cancellations had taken place. A similar majority of almost 80% had not seen any potential increase in business post referendum.

The final section of the survey attempted to identify the key priorities for the events industry following the decision to leave the EU. The first question in this section asked for a single key priority; this was then followed by an attempt to identify the top three concerns event professionals had following the referendum. 62 % of respondents identified that their single key priority was safeguarding trade – by reducing uncertainty and engaging with new markets. The second priority identified was reviewing existing legislation in order to ensure future business can be conducted efficiently (16%). The third priority (12%) was investing in UK infrastructure to improve our competitive position in the global market. Investing in people in order to manage the impact of changes to foreign worker status in the UK was the final priority, attracting 9%.

The detailed responses supplied to the questions around key concerns revealed some consensus across the sample. Based on the detailed comments submitted these can be grouped as follows, ranked by order:

Ranking	Primary Concerns	Sample comments
1	Business uncertainty	<ul style="list-style-type: none">• Large international clients stopping investment in UK• Reduction in work from international clients• Lack of EU grant funding
2	Reputation	<ul style="list-style-type: none">• Damage to reputation for being a modern international leader and trendsetter• European conventions stop including UK on their rotation patterns• Perception of UK as being protectionist and unfriendly

Ranking	Primary Concerns	Sample comments
= 3	Travel impacts	<ul style="list-style-type: none"> • Travel restrictions • Cost of overseas travel and events for UK business • Free movement of delegates outbound of the UK attending international events
= 3	Workforce	<ul style="list-style-type: none"> • Employees with non UK passports • Uncertainty of visa situation for current employees • Loss of experienced and good staff in hospitality sector
4	Regulation	<ul style="list-style-type: none"> • Lack of access to regulators

A summary of the secondary concerns identified by respondents is set out below:

Ranking	Secondary Concerns	Sample comments
1	Business uncertainty	<ul style="list-style-type: none"> • Large companies moving HQ from London • Possible restrictions to trade in Europe • Loss of willingness in EU to use UK companies as they are now outside EU
2	Workforce	<ul style="list-style-type: none"> • Talent from Europe decide not to come to UK • Europe HQ with EU staff may relocate to another EU country • Freedom of movement
3	Reputation	<ul style="list-style-type: none"> • Levels of prejudice displayed during and post BREXIT makes UK less appealing to international visitors • Backlash from European corporate • Less interest in the UK as a business tourism destination
4	Regulation	<ul style="list-style-type: none"> • Visa issues could cause problems for future events • Imposition of visa requirements within EU

A summary of the tertiary concerns identified by respondents is set out below:

Ranking	Tertiary Concerns	Sample comments
1	Business uncertainty	<ul style="list-style-type: none"> • UK not carrying same weight in research areas to warrant an international congress • Trade deals & competitiveness • Lack of investment in the business infrastructure from overseas investors
2	Regulation	<ul style="list-style-type: none"> • Diminished knowledge of changing EU regulations • Bureaucratic restriction to trading with international buyers • Duty/Tax & carnets
3	Reputation	<ul style="list-style-type: none"> • Britain has forfeited international respect and reduced its power on the international stage • People may think the British are racist and unwelcoming • Negative effects of increased racial discrimination reports being shown in the media
4	Transport	<ul style="list-style-type: none"> • Transport costs increasing • Access of UK airlines to Open Sky

The penultimate section of the survey sought views on regulation and legislation, firstly looking at those that impact on business negatively and that might therefore form part of the exit negotiations. Respondents focussed on some of the key themes identified earlier in the survey, such as the free movement of people in relation to changes to foreign worker status for EU citizens. The need to review the working time directive was mentioned by a number of respondents, as was TOMS (Tour Operator Margin Scheme) and OJEU (Official Journal of European Union) in relation to future procurement arrangements.

Significantly a number of respondents adopted a free trade stance by suggesting that nothing needed changing, as the existing legislative regime created a level playing field which supported trading across both the EU region and other international markets. As one noted, "It takes the same paperwork to transport and build an exhibit in the 27 states of the EU as it does to exhibit at the NEC."

This sentiment was also evidenced in the responses to the question relating to legislation and regulations that should be retained. The question of free movement of people (and equipment) featured prominently again, particularly in relation to moving UK staff around the EU. VAT recharge arrangements were also mentioned, as was replacing funding from EU institutions. There was also mention of the need to review Health and Safety legislation

as adopted by the UK – a sense that we have perhaps gold plated directives from the EU which our European neighbours have not taken so seriously.

The final question in the survey looked at opportunities that had been identified since the EU referendum result. The fall in the value of sterling was cited as an opportunity for some businesses, although this was offset against projects being delivered in Europe where margins were being eroded due to the Pound versus Euro exchange rate. A tick-up in domestic business was cited by several respondents, particularly in relation to the need for additional conferences and meetings being required by clients to help support SMEs facing a more competitive trading future.

A significant number of respondents opted to say either that there were no new opportunities or that it was too early to identify them before the impact of the any specific negotiations became apparent. The more optimistic free trade view also welcomed greater international opportunities and perhaps some competitive advantages developing within the sector, as weaker companies lose business as a result of the medium/long term impact.

3. Broader Industry Considerations

Reviewing the results of the BVEP Referendum Impact Survey it is apparent that there are a number of key issues and considerations that link to the broader tourism and hospitality industry, to which business visits and events contribute a significant value on an annual basis. In 'Events Are GREAT Britain', published by the BVEP in 2014, the UK events industry was valued at £39.1 billion to the UK economy in terms of direct spend by event delegates, attendees and organisers. This figure increases once the wider economic impacts of indirect and induced spend are factored in.

Within that broader context the BVEP partners share common concerns that have already been identified by colleagues developing the Tourism Exit Strategy. In summary these include:

Workforce issues – both the UK tourism industry and many businesses working within the extended supply chain that services the events sector (from food production and processing to venue and catering staff) currently rely heavily on overseas workers. The future arrangements for such workers remain unclear, particularly for EU workers in the hospitality sector, many of whom would not meet the current foreign worker visa requirements applied to other overseas workers.

Aviation capacity – a decision on the final choice for increasing capacity within the South East needs to be taken, particularly in relation to signalling that GB is ready to trade on a global basis and is investing in infrastructure to do so. Linked to this are the current regulations and agreements that help facilitate the movement of people between the UK and the rest of Europe. These include the Single Aviation Market, the EU-US Open Skies agreement and the management and regulation of airspace covered by the EC Single European Sky initiative.

Regulations – there are many regulations that currently enable event businesses in the UK to compete effectively in the single market without expending additional resources or time dealing with regulatory barriers. These include the Common Travel Area, transportation such as coach and bus services, the directive relating to Mutual Recognition of Qualifications within the EEA, a wide range of consumer rights, EHIC health arrangements, the European Driving Licence, immigration controls and the Posted Workers Directive.

Customs Union – the UK is currently part of a customs union that allows relatively free movement of equipment and exhibition materials across the EU without custom duties or import VAT. Changes to these arrangements means that it is possible that the transactional costs of trading with the EU will increase. Additional costs in the form of customs duties might also be involved. It is worth noting that some respondents to the BVEP survey pointed out that their current focus on international trade meant that they were already geared to deal with the demands of complying with such arrangements in overseas markets. For these respondents the primary concern was how long it would take the UK to negotiate free trade agreements with other countries and in what order should such markets be prioritised.

VAT – in the context of the current linkage between our EU membership and the way UK VAT currently operates, internationally focussed event businesses will need to adapt to any changes as a result of the exit negotiations. The current single claim mechanism will cease to apply, making the process for UK businesses to reclaim VAT incurred in EU member states more administratively complex.

Tour Operator Margin Scheme (TOMS) – the introduction of this scheme has directly impacted event businesses that design and deliver programmes for business clients. The application of TOMS to an event means that the events company is unable to recover VAT on the cost of those services within TOMS and cannot issue a VAT invoice to the client. This obviously increases the cost of an event substantially.

Most purchasers of events are business consumers and a previous TOMS opt-out trade facilitation measure was used by many events companies. A condition for the use of the opt-out was that VAT was accounted for by the events company under the normal rules. In practice this tended to restrict the use of the opt-out to events in the UK. Nevertheless, for such events the opt-out was of great significance and was widely used in the UK event industry.

There is no suggestion that all events fall within TOMS. Even where TOMS does apply, it may apply only to a number of the services incorporated into an event, with the crucial point of distinction being the nature of services incorporated into the event. The most common services which may create a need for TOMS are overnight accommodation and passenger transport. There is a great need for clarification on a number of the issues relating to TOMS, with a re-instatement of the opt-out for business to business transactions being the main priority for any future negotiations.

4. Framing the Event Industry Response

Although the work undertaken by the BVEP gives a clear indication of the key issues from an industry perspective, framing the impact of the referendum on the diverse and creative businesses that make up the UK event industry presents a real challenge. Unlike other sectors the event industry in the UK is not classified as a separate and distinct industry sector in its own right. This means that the data associated with other industrial sectors, such as the creative industries, automotive, retail or manufacturing is not as easily available. So hard data on key statistical measures such as total number of employees, our contribution to economic performance, import and export values etc. are not available or validated from a single recognised source such as the Office for National Statistics.

Whilst the BVEP has amassed much research and published evidence on the size and worth of the event industry for UK plc, the framing questions that the government is asking business sectors to consider as part of the preparation for future negotiations highlights the lack of hard data required to support our specific industry needs. So questions around our reliance on EU imports and exports for example prove difficult to answer.

To illustrate this point the Global Events Study organised by the AEO in 2015 identified that 72% of total exhibitions turnover was generated overseas, with a value of £2.05 billion. The bulk of these exhibitions (in excess of 200) were located in Western Europe and Eastern Europe/former Soviet Union. There is no doubt that changes to the free movement of goods, services, capital and labour will impact on future exhibition business in the EEA in some form. (It should also be noted that these figures are sourced from AEO members only, so do not provide a comprehensive view of the total value for overseas exhibitions produced and delivered by the UK exhibitions industry.)

As evidenced in the BVEP survey the key concerns affecting the events industry focus on similar challenges and opportunities for many other industrial sectors – they could be summarised as talent, tariffs and trade. Recognising that the business visits and events industry is an integral part of the broader trading nation that now needs to re-define our relationship with the EU and forge new trade agreements with other international markets appears to be the most effective way of framing our response. In the truest sense the UK events industry is part of an extended supply chain that involves many different sectors – from food production to catering, logistics to venues and hotels, hospitality to hosting major global events. In addition using our creative and technical expertise and innovation in the digital space, we support the fast growing creative industries sector that has helped establish the UK as a major source of creativity across the globe.

As identified in this paper there are some specific issues and items of EU regulation that will need to be examined carefully as part of the final negotiations – complex areas such as the Management of Health and Safety at Work Regulations being a prime example of regulation that has a very direct operational impact on the events industry. The final vehicle for exit will in many ways determine the focus for future negotiations.

5. Conclusions

Whilst the primary purpose of this paper is to reflect on the results of the BVEP Events Industry Referendum Impact Survey, it has been produced in a context where developments in both the political and business spheres are moving forward and consideration must be given to the impact of these in relation to the key concerns identified in the survey results. There is now more clarity around timing with the recent announcement by the Prime Minister that Article 50 will be triggered by March 2017. In addition she announced the repeal of the 1972 European Communities Act as part of the formal process of ending the supremacy of EU legislation in Britain.

This will transpose EU laws into domestic law wherever practical on exit day. This will then enable UK elected politicians to make the changes required to reflect the outcome of the negotiations and final exit. Whilst this political process does not provide any greater certainty in itself, it at least indicates how the government plans to cope with the biggest legislative and legal challenge that the UK has faced in peace time. Unpicking the 12,295 EU regulations that have been put in place over 40 years and that currently form one sixth of the statute book in the UK will be a complex and time consuming task. Like many other business sectors the events industry will have to be fully engaged in assisting in this process and the concerns around regulation identified in the survey are a good starting point for such discussions.

After business uncertainty and regulation, reputation featured in the BVEP survey as another key area of concern. Creating a cohesive view about how we want our economy to be seen by the world – free trade, global or protectionist – is certainly beyond the remit of the BVEP, but our partners represent a wide range of businesses that have slightly different needs and interests, all of which will dictate their attitude to how we present ourselves to new markets, partners and clients moving forward. There is a clear need to refocus our identity and offer something new and innovative to the world and the events industry by its very nature has always been agile, resilient and creative when facing such challenges previously.

The future success of the UK events industry is also inexorably linked to the longer term impacts on the key industrial sectors that we serve. One good example would be the automotive sector, where events such as product launches and dealer training sessions, trade shows and consumer experiences all provide opportunities for the UK events industry to support the sales and marketing campaigns of major motor manufacturers based in the UK. The same applies across many other sectors – from finance to pharmaceuticals, professional services to retail, manufacturing to IT and internet businesses. Aligning with the changing and developing needs of these key customers moving forwards will be critical for the longer term outlook for the UK events sector.

Issues around the workforce have also been identified in the survey results. This not only relates to the potential future skills shortage that have been identified in relation to the numbers of EU workers currently found in the hospitality sector. The higher and further education sector has also developed compelling professional routes into our industry and much of this currently depends on attracting both funding from EU sources and

international students to study and work in the UK. Maintaining this diversity and the development of a much needed talent pool for the UK events sector is another key consideration that needs to be on the agenda.

Finally the UK events industry is represented by a diverse range of separate trade associations and professional bodies which the BVEP exists to serve. It is apparent that many other business sectors have created dedicated task forces to take on the demands of the complex process that lies ahead. This means that the need to improve the sharing of resources, collaboration and communication across the UK event industry has never been greater, given the levels of engagement and insight that will be required to inform future complex negotiations across a wide range of issues. Consideration on the best ways of coping with the demands of this task will be required in order to ensure that the UK events industry can influence future developments efficiently and effectively.

Simon Hughes
Vice Chair BVEP
October 2016

APPENDIX 1. BVEP PARTNERS

All of the organisations listed below are partners of the Business Visits & Events Partnership. Partners are listed in alphabetical order.

ABPCO - Association of British Professional Conference Organisers



The aim of ABPCO is to raise standards of professionalism across the meetings industry and to increase business for its members (PCOs). Membership requires a high level of professional competence and experience, and members are also offered opportunities for training and professional development.

ACE - Association for Conferences and Events



Established in 1971, ACE is the broadest membership organisation in the meetings industry. Unique in that it acts as a forum and information centre for members involved in all facets of the sector.

These include corporate companies, sole traders, professional institutions, charities, societies, local authorities, trade associations, educational bodies and individuals. All these members organise events and purchase venues, facilities and services from a comprehensive range of suppliers.

AEME - Association for Events Management Education



AEME exists in order to support and raise the profile of the events discipline through the sharing of education and best practice. It is also the first international organisation to draw together events management educators and will act as a channel through which industry, professional bodies and the media can liaise with events education providers.

Membership is open to individuals or organisations interested in furthering AEME's work.

Core Cities



Core Cities includes Liverpool, Leeds, Manchester, Sheffield, Newcastle, Birmingham, Bristol and Nottingham. The Meetings and Events Industry is of great importance to cities outside of London and this group meets regularly to share best practice and develop a joint approach on issues of relevance.

EIA - Events Industry Alliance



The EIA is a business created by three event industry bodies – ESSA, AEO and AEV to provide an association management secretariat service in the events industry.

EIF - Event Industry Forum



events industry forum The Event Industry Forum is an informal body which meets twice a year to provide a gathering where events industry trade associations and similar bodies can meet to discuss issues of common interest.

Other than a Chairman and Secretary, elected annually to co-ordinate meetings and disseminate information, the Forum has no formal structure or role, although from time-to-time it may act to represent its member bodies in respect of issues where there is a unilateral and common interest. There is steering committee whose sole purpose is to select topics for discussion and to elect officers annually.

EMA - Event Marketing Association



EMA is a non-profit organisation for corporate in-house event planners & marketers. Their purpose is to share and promote best practices throughout their membership. What differentiates EMA from other networking groups is their focus on one sector: in-house corporate event marketers as well as their commitment to education and learning, best

practice and industry recognition. They are here to represent, support and champion their members by sharing knowledge, expertise and experiences.

EVCOM



EVCOM is the trade association representing the commissioners and creators of the world's most original and impactful live events, conferences, film and digital communications. Through networking, training, lobbying and awards, EVCOM is an international voice championing the power of live and visual communication.

EVCOM is a diverse global community of professionals, united by a passion for the creativity and effectiveness of our work.

HBAA - Hotel Booking Agents Association



HBAA, the trade association for the hotel booking agency, apartment and venue community, specialise in the procurement of accommodation, conference and event facilities and services in the UK and internationally on behalf of clients. HBAA is the association that supports them and the hotel apartment and venue companies they work with.

Since 1997, the HBAA has been helping both businesses and individuals within them to strive for ever higher professional standards. The HBAA runs a busy schedule of training, meetings and networking events throughout the year. It is the voice of the sector to Government and to business at large.

With agency members, hotel, apartments and venue company members - ranging from global hotel brands to independent properties. All members agree to adhere to the HBAA Code of Conduct; it defines best practice between agents and venues, thus protecting the interests of their clients.

ICCA - International Congress & Convention Association



ICCA is now one of the most prominent organisations in the world of international meetings. It is the only association that comprises a membership

representing the main specialists in handling, transporting and accommodating international events.

With ICCA members in more than 76 countries around the world, it is the most global organisation within the meetings industry. The UK and Ireland chapter of ICCA has over 70 members and holds a range of meetings and seminars throughout the year, along with supporting industry research.

ILEA - International Live Events Association



INTERNATIONAL
LIVE EVENTS ASSOCIATION

The International Live Events Association (ILEA), formally the International Special Events Society, is the principal association representing the world's largest community of creative event professionals, globally. It was founded in 1987 to foster enlightened performance through education while promoting ethical conduct. ILEA works to join event and meeting professionals to focus on the "event as a whole" rather than its individual parts. It has grown to involve over 5,500 members active in over 50 chapters throughout the world. The solid peer network ILEA provides helps special events professionals produce outstanding results for clients while establishing positive working relationships with other event colleagues.

London & Partners (formerly Visit London)



London & Partners is the official promotional agency for London attracting and delivering value to businesses, students and visitors. London's official convention bureau sits within London & Partners. They offer a total event solution service for clients and event organisers, including free and impartial advice on planning meetings, conferences, events, exhibitions, incentives and launch parties in London.

They bid to attract association congresses to London and facilitate with all aspects of set up. They are the experts on opening up London for all business audiences and work in partnership with key providers across the city.

Meet in Ireland



Meet in Ireland is the official MICE (meetings, incentives, conference and events) brand for the island of Ireland. It comprises three official tourism authorities: Tourism Ireland, Fáilte Ireland and the Northern Ireland Tourist Board.

Working in partnership with the tourist boards, Failte Ireland in the South and Northern Ireland Tourist Board in the North, Tourism Ireland is the organisation responsible for marketing the island of Ireland overseas as a holiday and business tourism destination.

MIA - Meetings Industry Association



The MIA sets the 'Gold Standards' for the UK meetings industry. As a supplier led buyer-focused organisation the MIA is committed to benefiting and enhancing the UK meetings industry through the encouragement of the highest standards in facilities and standards.

MPI - Meeting Professionals International UK Chapter



MPI is one of the leading associations for the global meetings industry and is committed to delivering success for its 21,000 worldwide members by providing innovative professional development, generating industry awareness and creating business development opportunities.

NITB - Northern Ireland Tourist Board



Northern Ireland Tourist Board supports the activities of the two city Convention Bureaux in Belfast and Derry and the Regional Tourism Partnerships (RTPs) to attract conference, association and incentive business to Northern Ireland. The Business Tourism Unit facilitates the trade through, participation at overseas promotions, facilitating familiarisation inspections by overseas conference organisers and incentive houses and providing a link to suppliers of conference services.

NOEA - National Outdoor Events Association



The National Outdoor Events Association represents nearly 500 members, including Local Authorities, Show Organisers, Promoters, Events Management Companies and Suppliers of equipment, services and entertainment. It

produces a members' yearbook and organises an annual convention and several regional conferences throughout the year addressing the priority issues for the industry. Yearbooks are available free of charge upon application to NOEA.

PCMA - Professional Convention Management Association



PCMA provides educational opportunities for leading organisations in the meetings, conventions, events and trade show industries and currently represent 6,300 members from 17 chapters throughout the United States, Canada and Mexico. With members now in more than 35 countries, PCMA provide the highest quality educational opportunities through meetings and networking events, addressing today's challenges and opportunities facing event professionals.

PSA - Production Services Association



The Production Services Association represents companies and individuals that provide technical infrastructure for live events, a key asset to the UK's business events sector. From small conferences to mind blowing ceremonies, the UK provides the finest production talent; we are their voice.

Site Great Britain



SITE is the only not-for-profit, global organisation which is dedicated to supporting and connecting professionals in the incentive travel and motivational events industry. SITE has nearly 2,000 members in 90 countries. SITE GREAT BRITAIN - Global Connections, Motivational Experiences and Business Results.

Visit Wales



Visit Wales, the tourism department of the Welsh Assembly Government, provides MICE buyers with impartial advice, assistance with venue selection, local knowledge and support

services. Visit Wales also supplies statistics, consultations and business information on tourism in Wales.

VisitBritain



VisitBritain will deliver measurable economic benefit for the UK Visitor economy from new events, enhanced delegate numbers, business extenders by working with the nations and regions of Britain to add value; and for the wider economy through enhanced opportunities to trade and export, invest and profile Britain as a centre of excellence in these key priority sectors.

Visit England



VisitEngland is the national tourism body for England. Its role is to grow the value of tourism by working in partnership with the industry to deliver inspirational sales and marketing campaigns and to provide advocacy for the industry and visitors. The organisation's work is underpinned by robust research and customer insights.

The team at VisitEngland provides impartial advice on all aspects of organising events in England and can coordinate proposals from destinations, venues and other suppliers and opportunities for partnership marketing.

Visit Scotland Business Tourism Unit



The Business Tourism Unit of Visit Scotland actively promotes Scotland as a dynamic destination for meetings, incentive travel and corporate events. It produces guides and brochures to help the meeting or incentive planner, and gives impartial advice and assistance in venue selection.

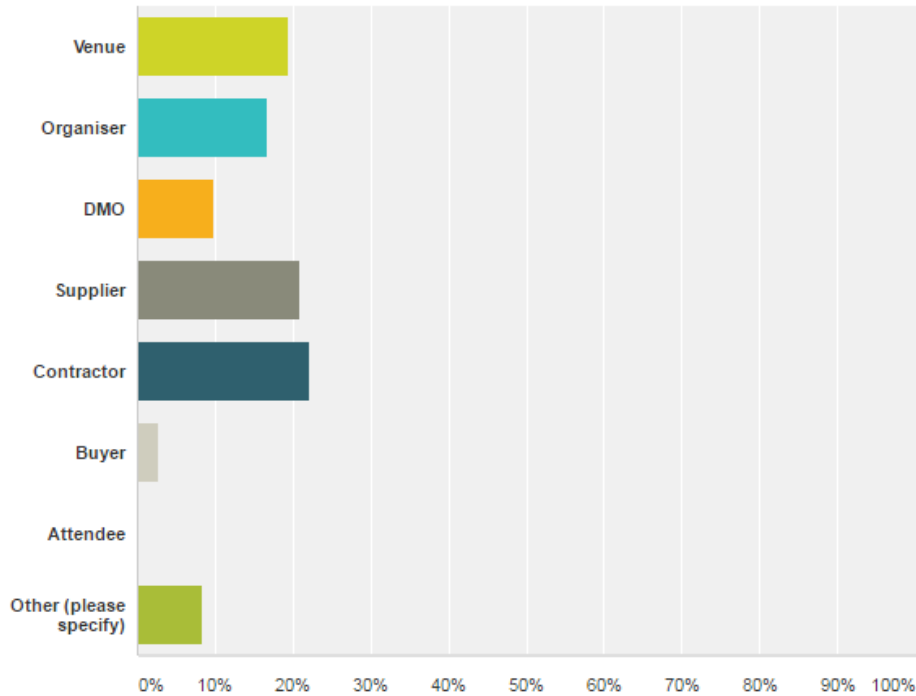
APPENDIX 2. BVEP Events Industry Referendum Impact Survey – Summer 2016



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

What type of event business do you represent?

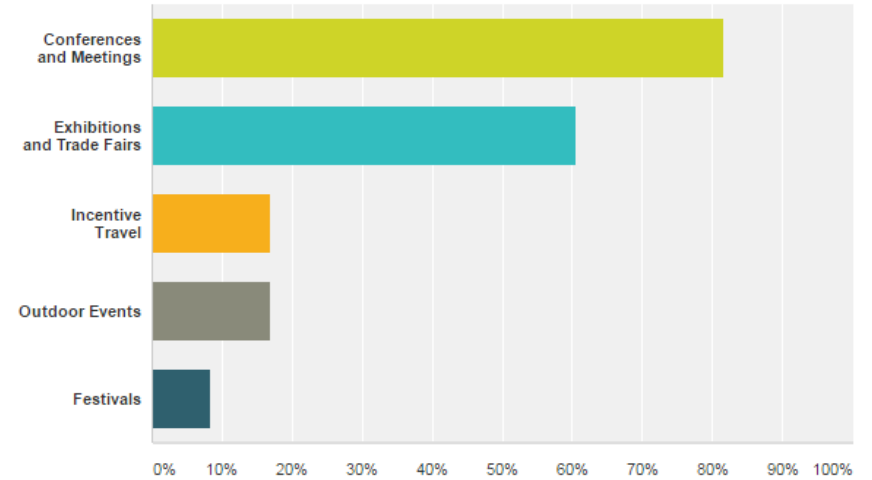
Answered: 72 Skipped: 0



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

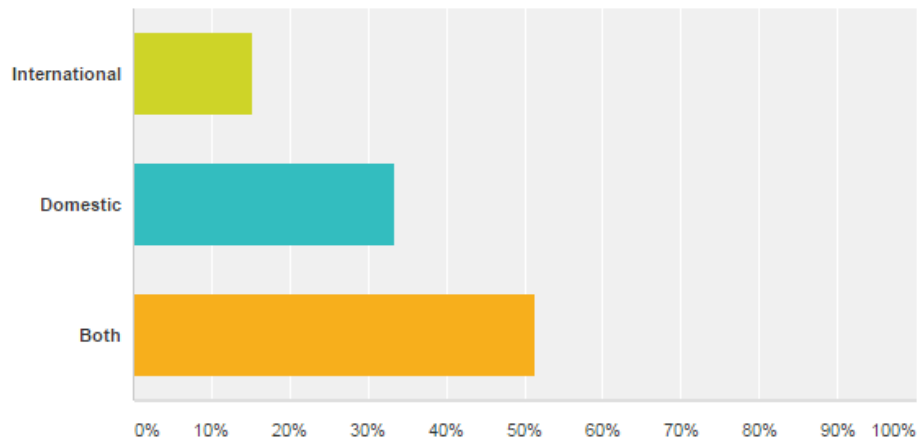
9/2/2016 9:39 PM

consumer travel

7/20/2016 2:16 PM

Is your business predominantly?

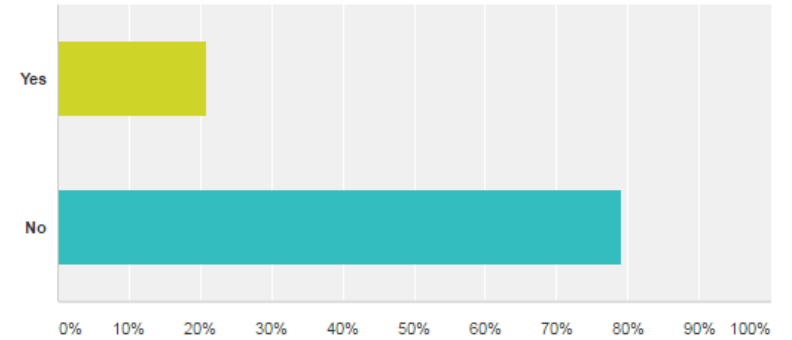
Answered: 72 Skipped: 0



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?

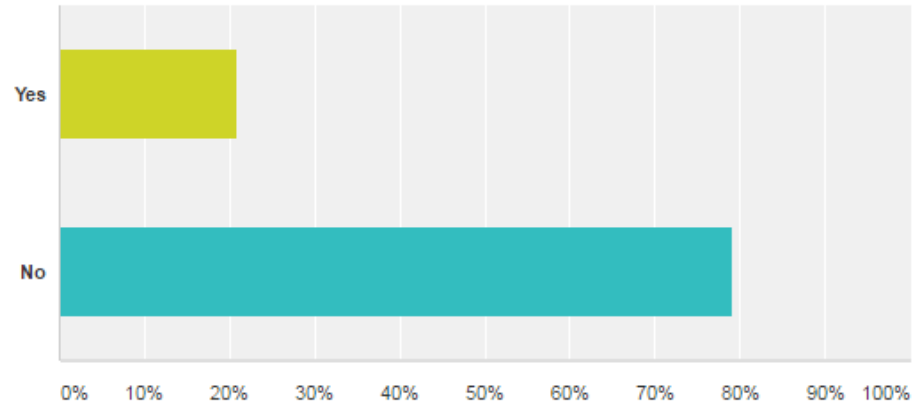
Answered: 72 Skipped: 0



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

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

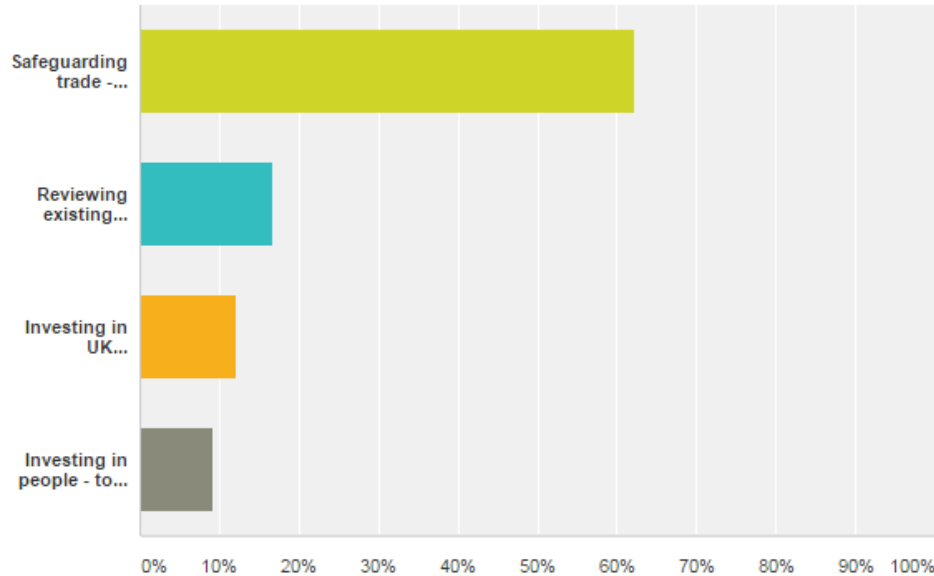
Answered: 72 Skipped: 0



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