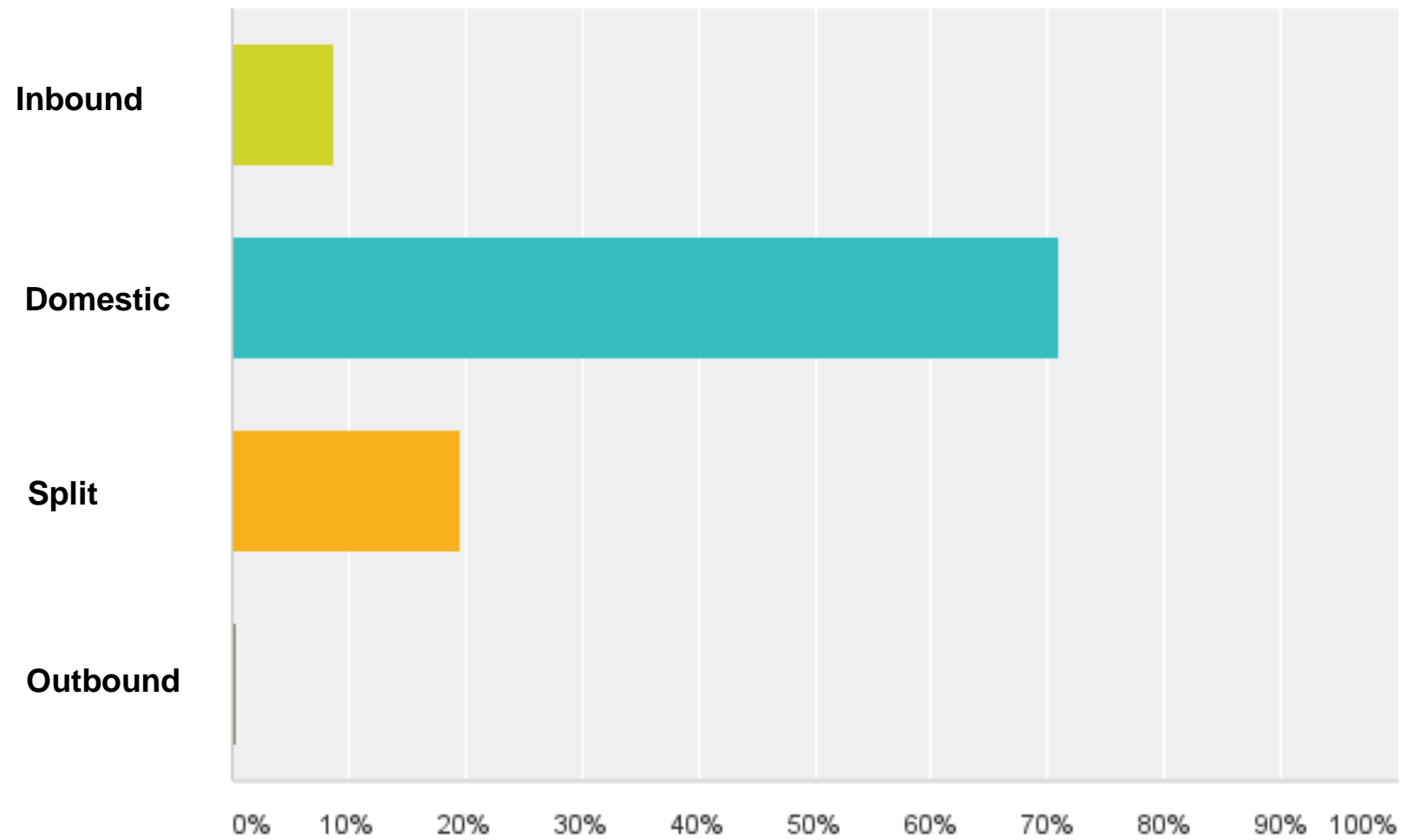


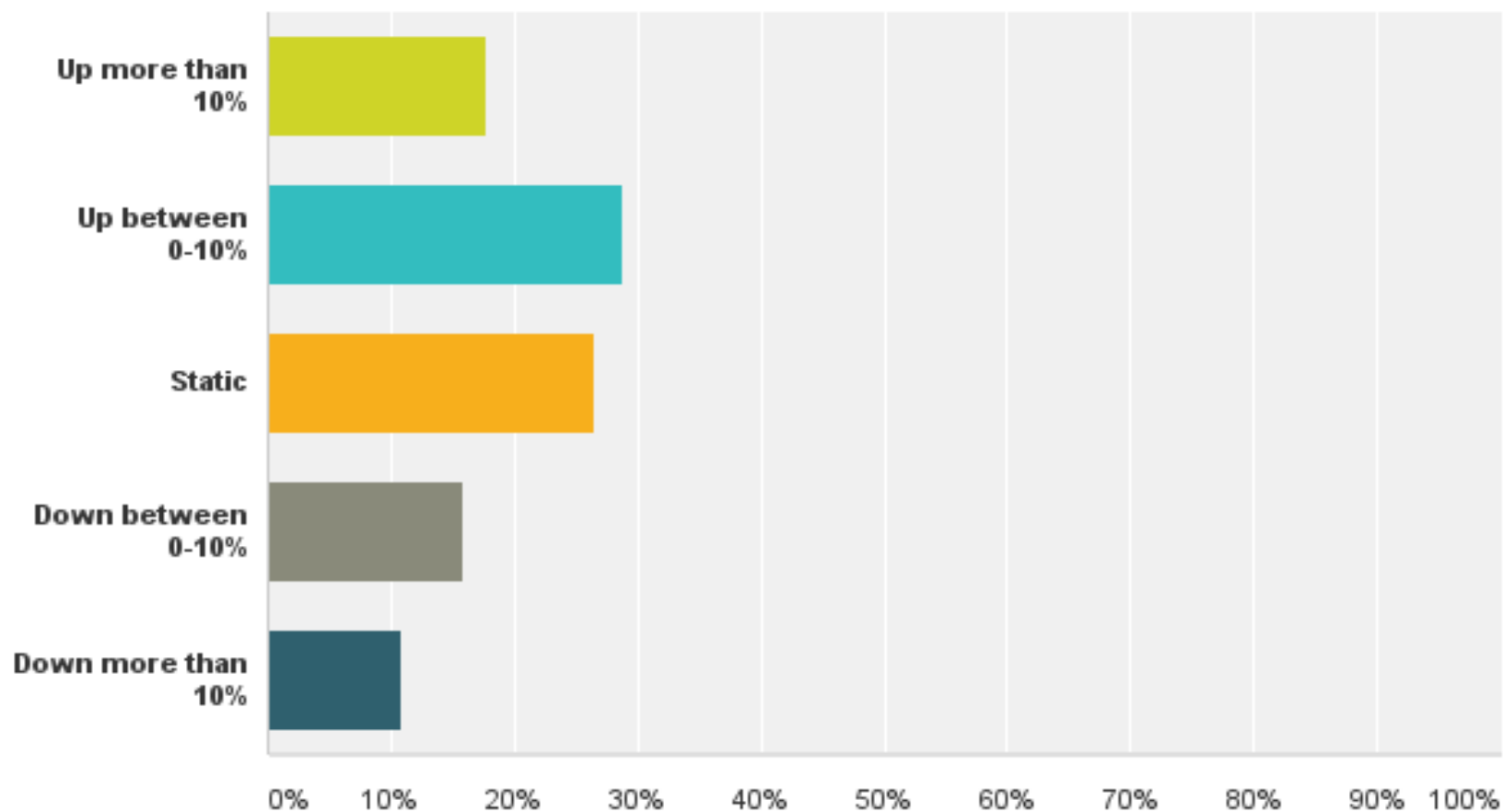
Referendum Impact Survey

Kurt Janson
Director

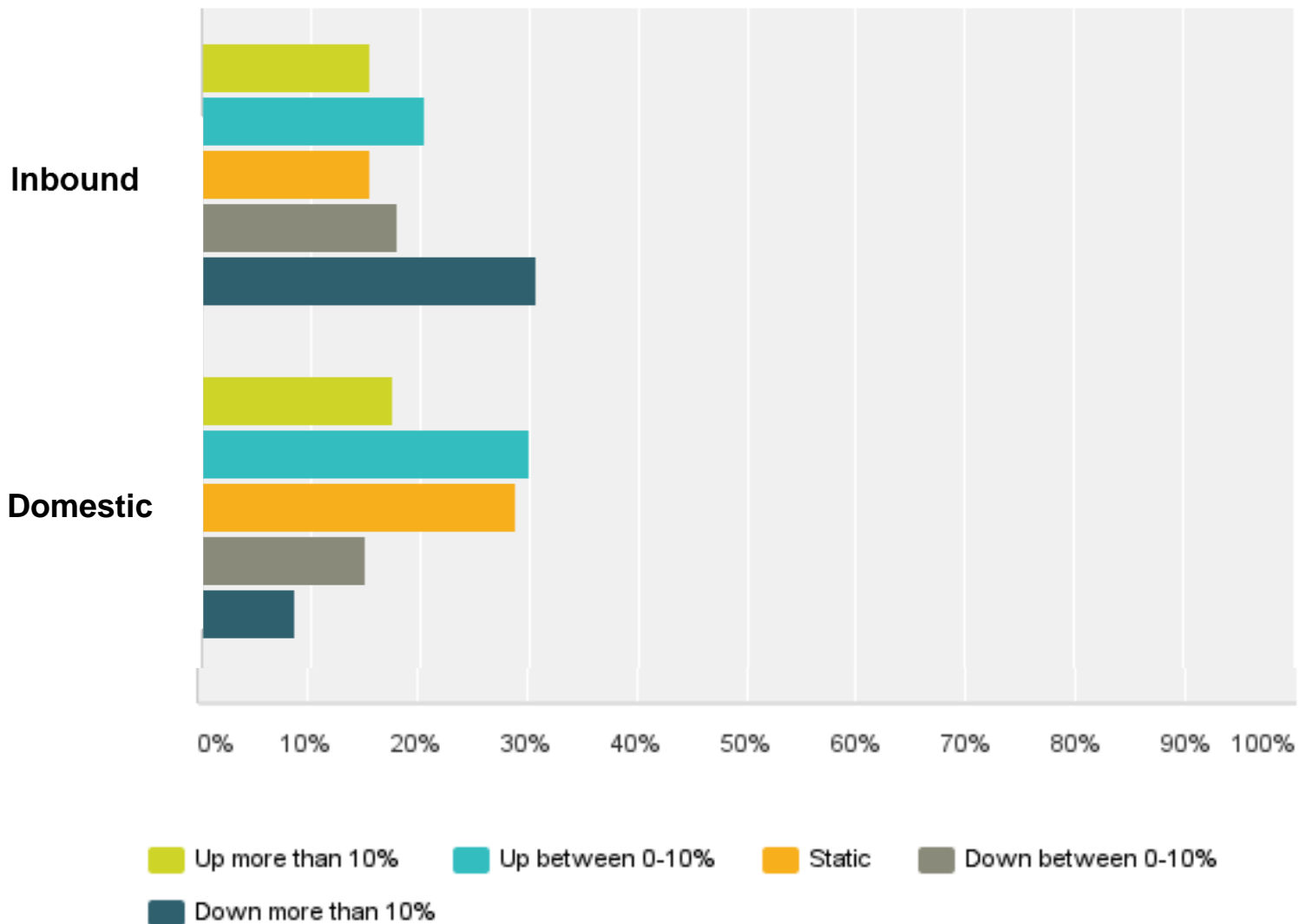
Q2 Is your Organisation/Business ...



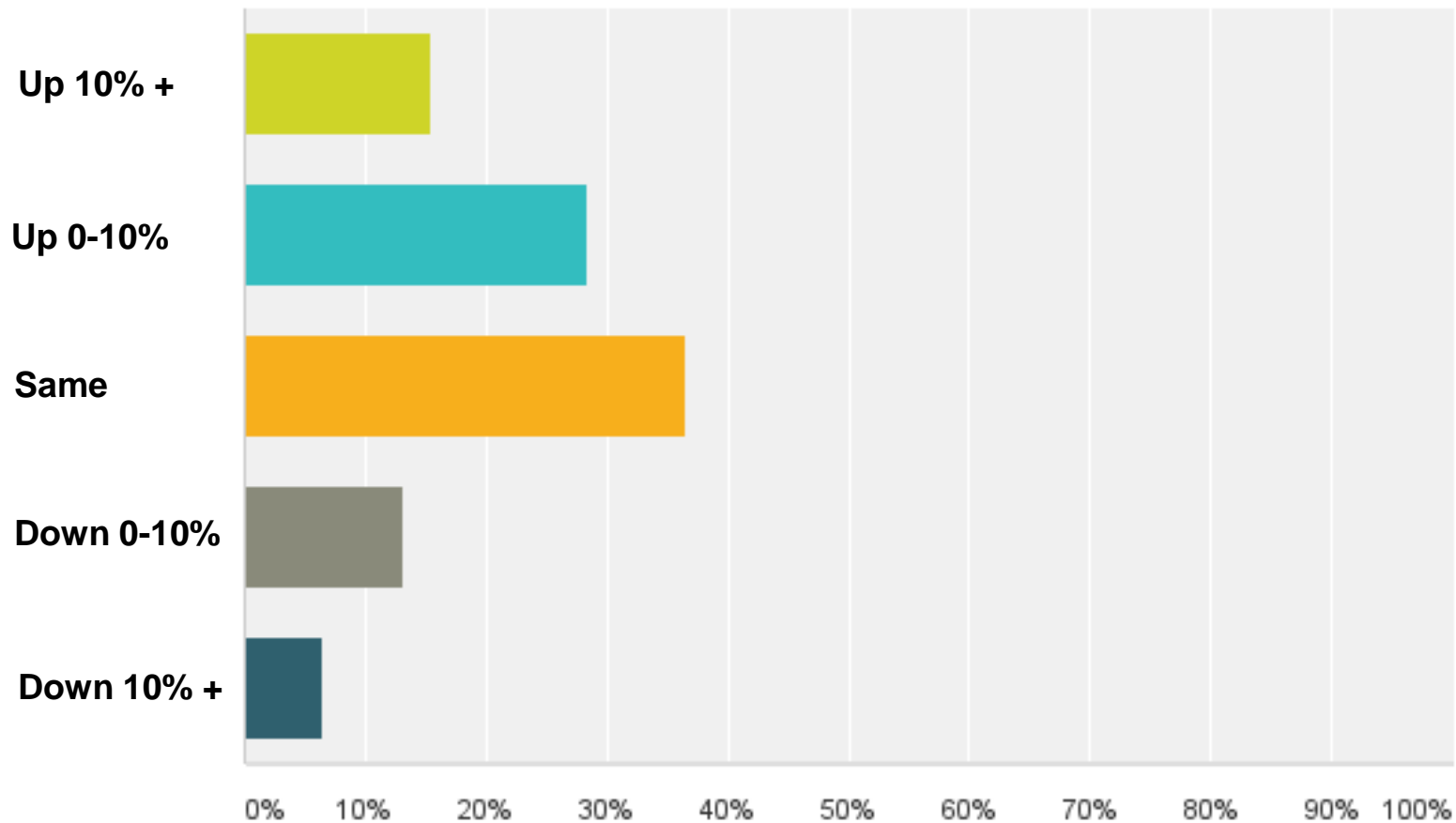
Q3 Compared to the same period last year, was business between 1 January 2016 and the Referendum ...



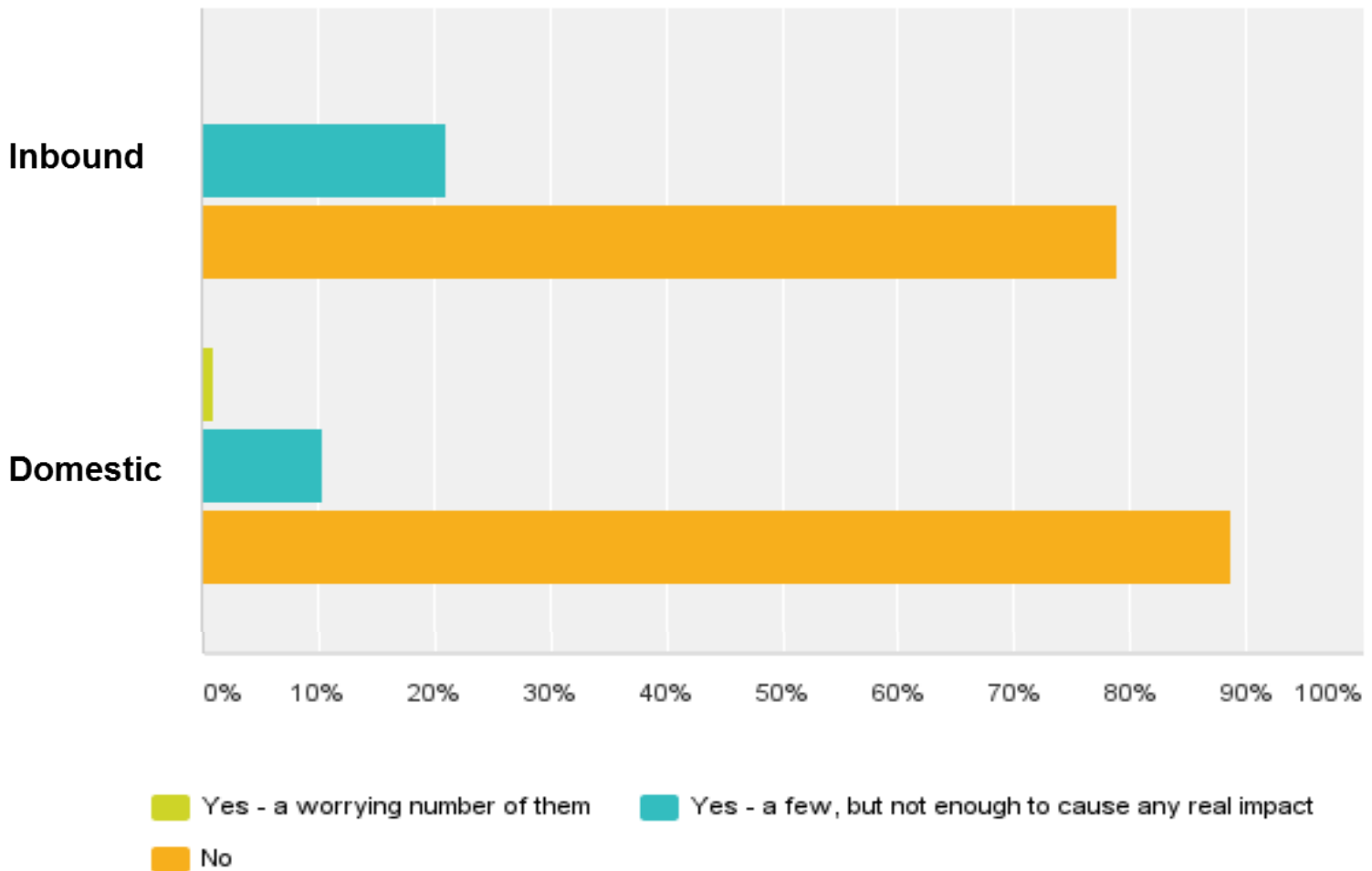
Q3 Compared to the same period last year, was business between 1 January 2016 and the Referendum ...



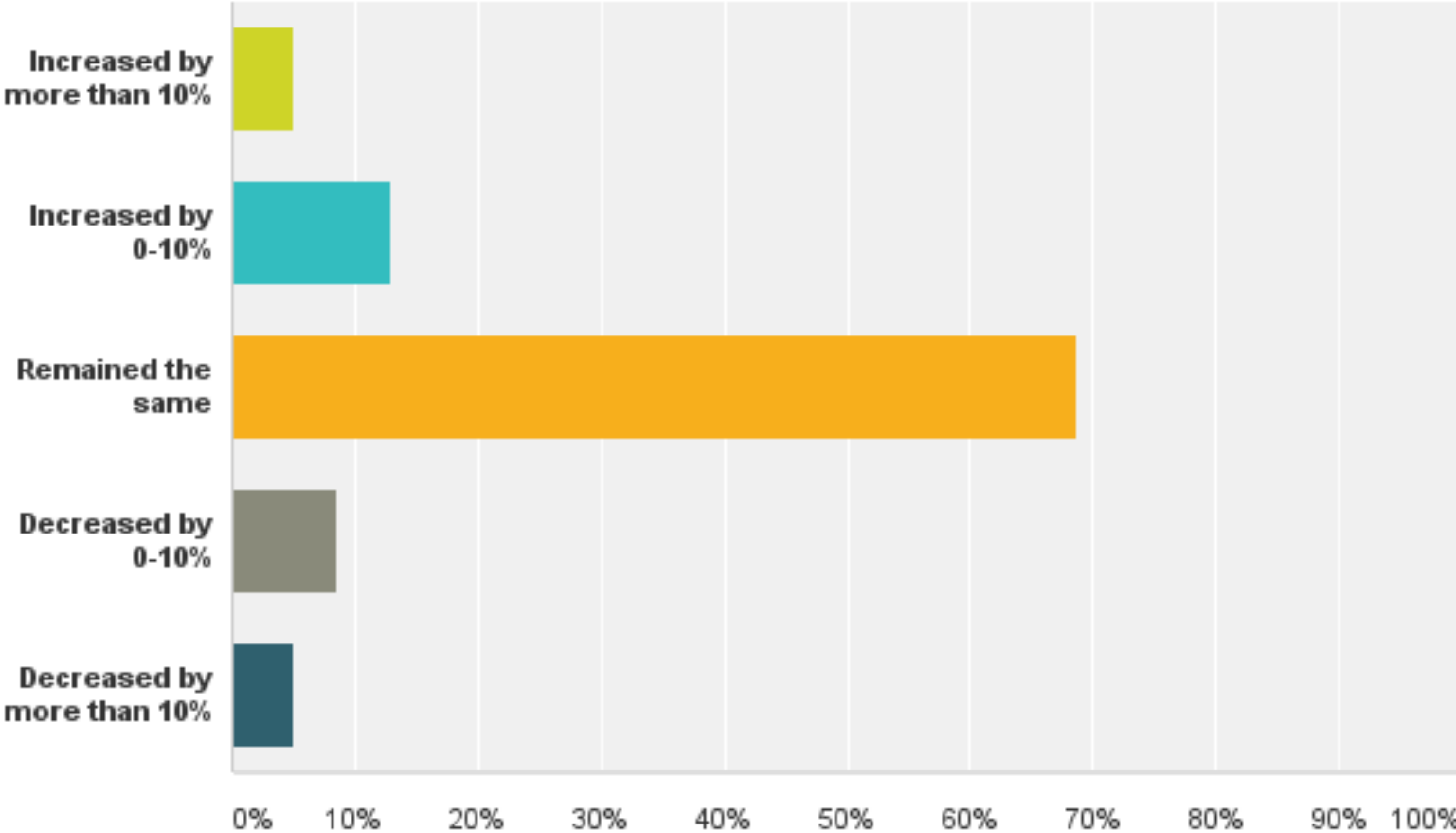
Q4 Prior to the Referendum, were your forward bookings ...



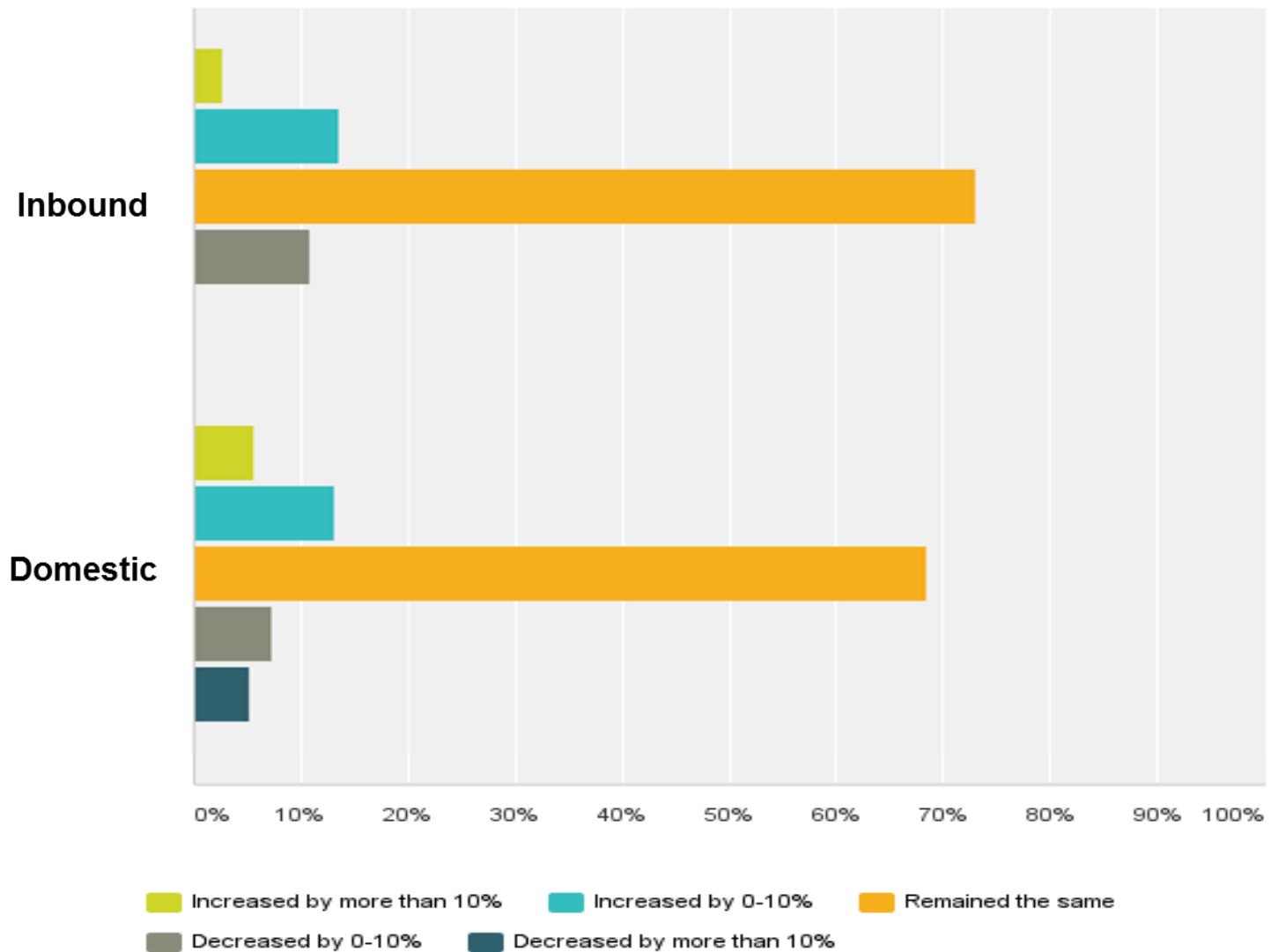
Q5 Have you experienced any cancellations since the Referendum?



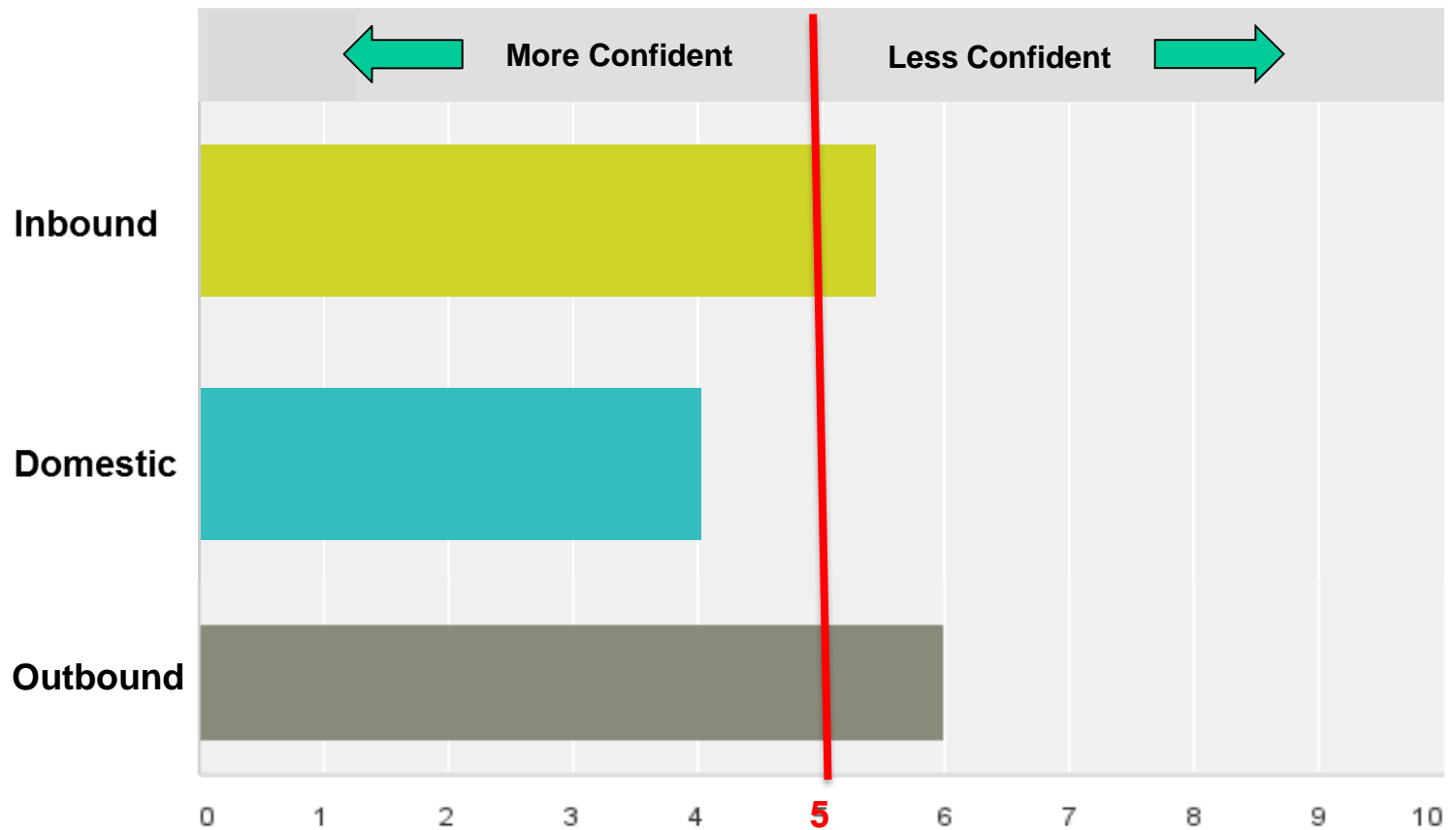
Q6 Since the Referendum, have your forward bookings...



Q6 Since the Referendum, have your forward bookings...



Q7 How confident are you feeling overall for business in the next 12 months?



Q8. What are your Main Concerns and Opportunities (Inbound)

Concerns

- **Perceptions of welcome**
- **Status of staff**
- **Reduced access to the UK**
- **Reduction in business travel**
- **Reduction in investment**
- **Unstable exchange rates**

Opportunities

- **Weak pound**
- **More focus on Asian markets by Govt**
- **More focus on tourism by Govt**

Q8. What are your Main Concerns and Opportunities (Domestic)

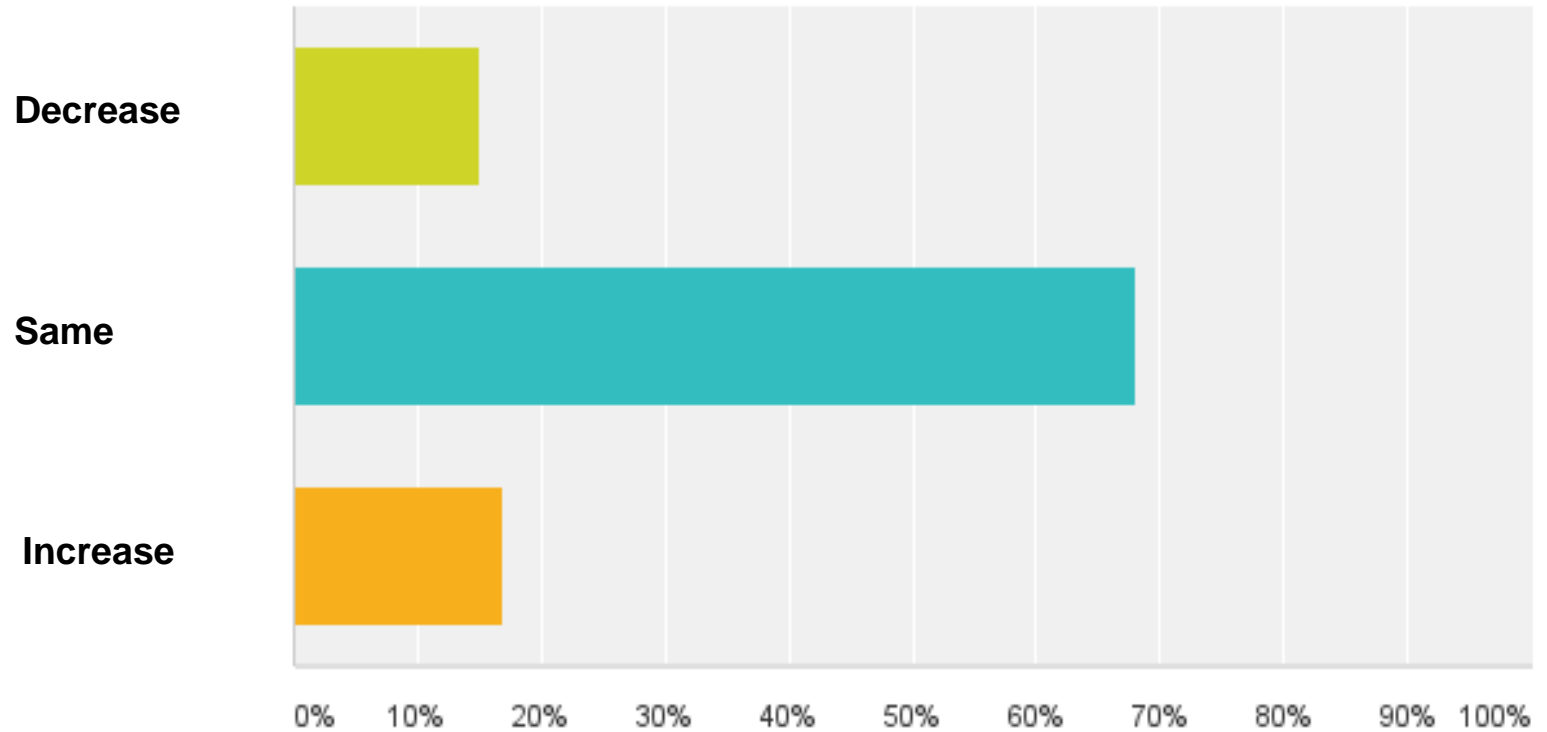
Concerns

- Increased costs and lower spending
- Uncertainty delaying spending decisions
- Less Govt expenditure
- Recession
- Fuel costs

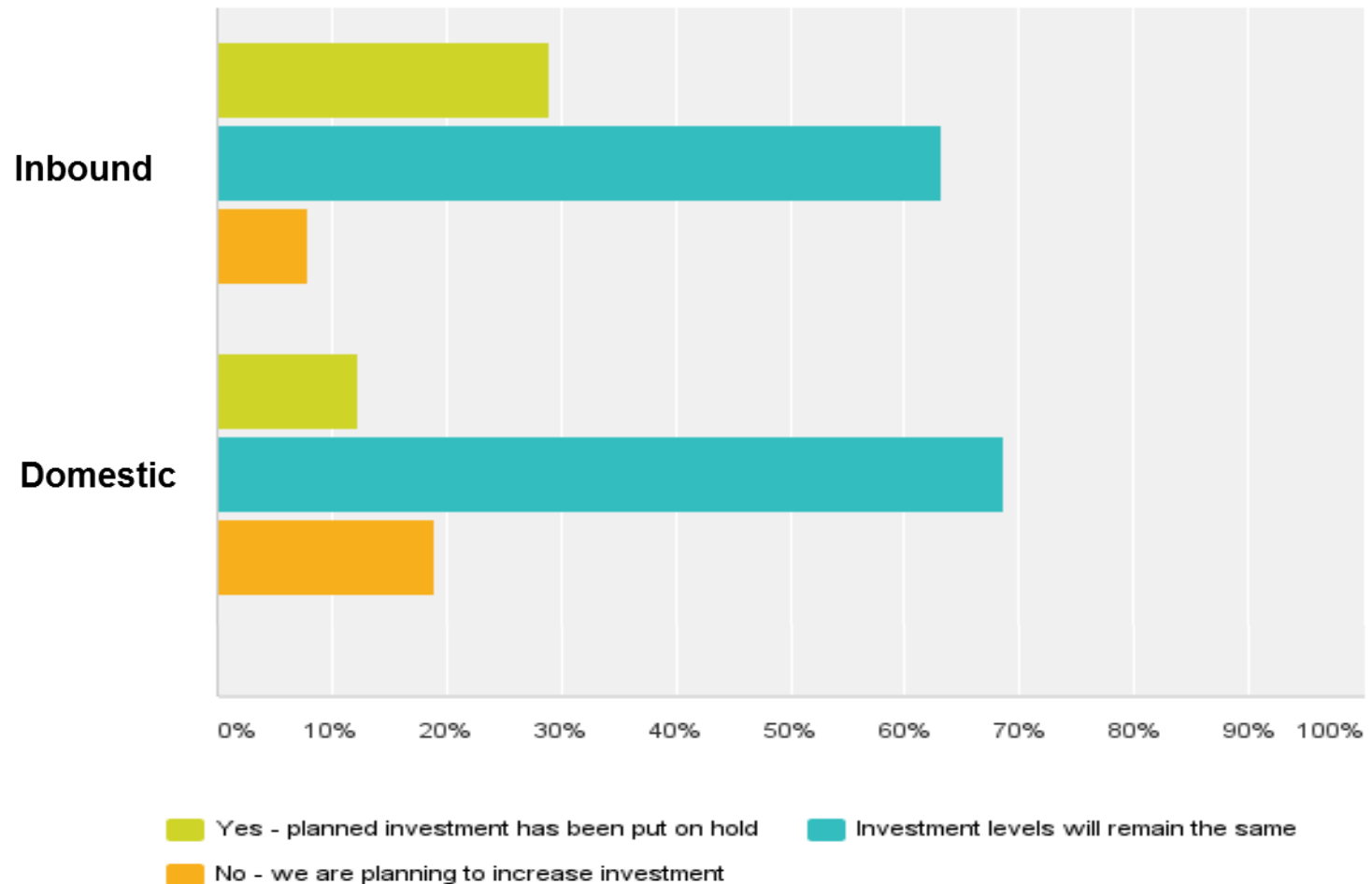
Opportunities

- Low pound
- More overseas visitors
- Less regulation
- Being seen as a safer destination
- Continuing low interest rates
- More opportunity to change VAT

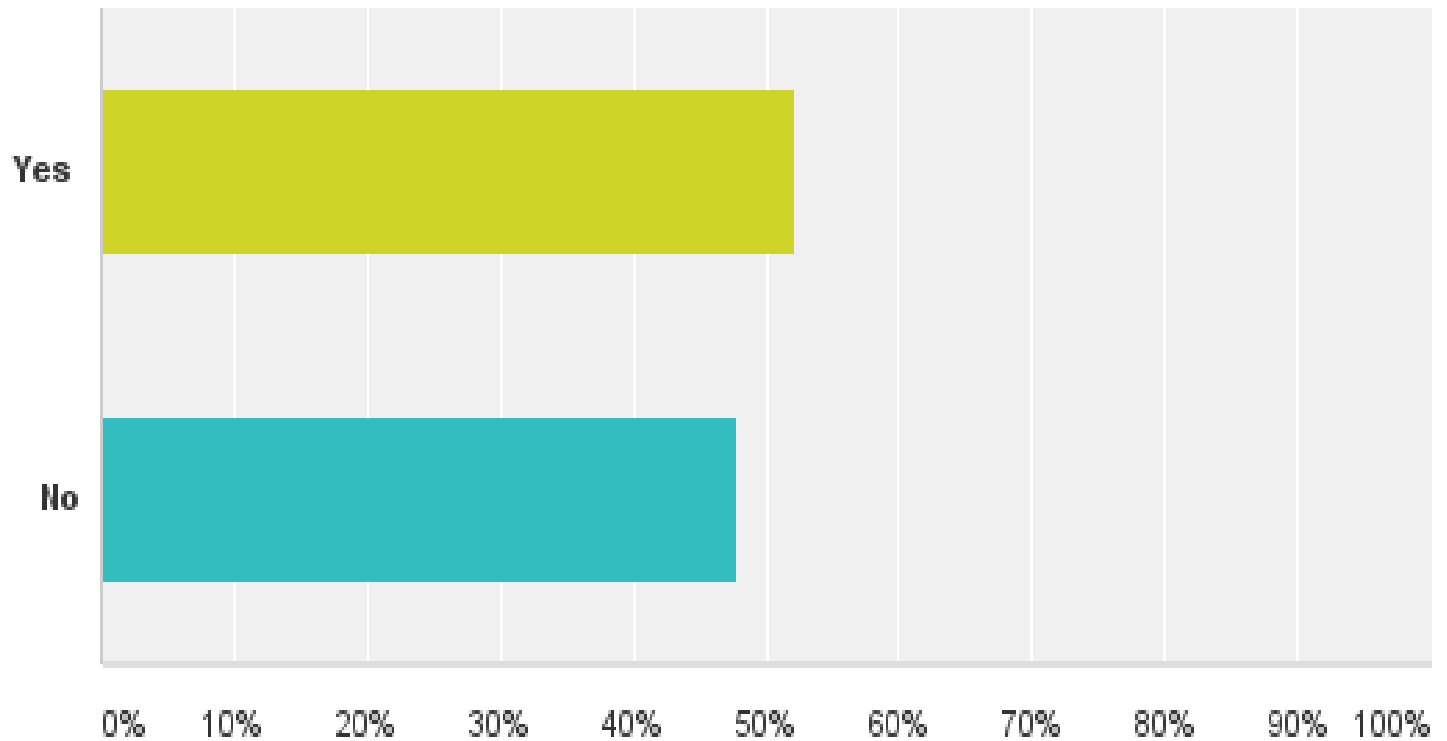
Q9 Has investment in your sector/business been adversely affected by the Referendum result ?



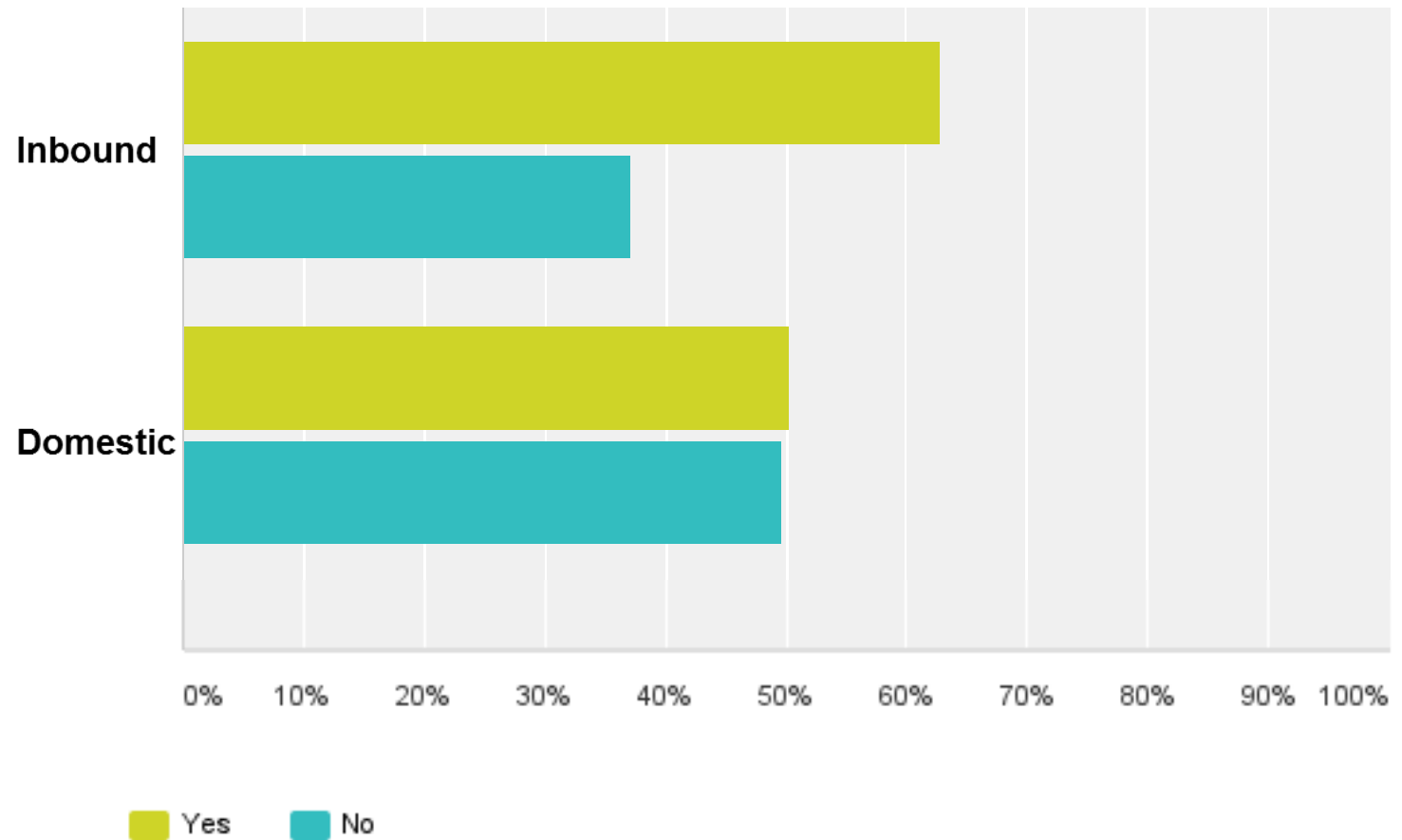
Q9 Has investment in your sector/business been adversely affected by the Referendum result ?



Q10 As a result of the Referendum, do you foresee your costs increasing ?



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