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A YEAR IN REVIEW 2017/2018





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WELCOME FROM THE CHAIR

Once again, it is a great pleasure to welcome you to our Year in Review.

Fortunately the past 12 months have not been quite as tumultuous as they have been previously, but of course there have still been issues and concerns from our members and we have tried our best to respond to them as quickly and appropriately as we can.

Unsurprisingly, one of the main issues has been around the current and future impact of Brexit. In a recent survey, and at our networking evenings and CEO roundtables, our members have told us that their EU employees are starting to return home and it is a struggle to recruit replacements from within the UK. This is primarily due to the lack of advanced language and customer service skills among British nationals. Furthermore, our members have told us that the lack of clarification about what access arrangements there will be for our valued EU visitors post-Brexit is also starting to worry many of their suppliers and clients.

The UKinbound Board therefore took the decision to fund and launch a campaign to raise awareness about the decline of language skills in the UK and to urge Government to ensure that our borders will be as frictionless as possible when we leave the EU. On 19 June, the Association organised a photocall outside the Houses of Parliament, meetings between our members and MPs and a parliamentary reception where we launched a new piece of language skills research in partnership with Canterbury Christ Church University.

The day was a great success and I was very reassured to have the support of new tourism minister Michael Ellis MP and also to see so many of his parliamentary colleagues turn up to support our events. Going forward, we will be continuing this campaign with a series of summer visits by MPs to members' businesses and a letter campaign to Government this autumn. Please try to support our efforts where you can so we can build on this momentum, increase the industry's 'influence and voice' and ultimately help to improve trading conditions for the industry.

In March, the Board and I met with the Secretariat to discuss and decide some

key projects for the Association. Among these projects are:

- A strong focus on providing added value to our members, including commissioning in-depth research into what members want from us
- A new apprentice award to encourage more young people to come into the industry (to be launched at our Annual Convention)
- More resource and investment in lobbying and research
- Maintaining the breadth and quality of our events, and introducing a free B2B event
- More investment in staff training and technology facilities for the Association

The past 12 months have yet again seen some fantastic events take place, such as our Annual Convention in Cardiff, our Discover programme, Market Seminars and two CEO roundtable meetings. I am looking forward to attending our Annual Convention in Glasgow next February and meeting as many of you as possible before I step down as Chairman.

The Association is very sad to lose CEO Deirdre Wells, who has been a wonderful advocate for our industry and achieved a huge amount for the Association during her tenure. Rest assured though that I will be doing all that I can to secure a worthy successor for Deirdre and to support the Secretariat through this transition period, and also that of the Board elections which will be held in the run-up to Christmas.

With the UK officially leaving the EU in March next year, the next few months will be a time of substantial change for all!

Kind regards,



Mark McVay,
Chairman



WELCOME AND GOODBYE FROM THE CEO



I am delighted to welcome you to what will sadly be my final foreword to our annual Year in Review as CEO of UKinbound, before I take up my new role as Chief Executive of Visit Kent/Go to Places in autumn.

I have had so many incredible experiences since taking up my role in early 2014 and it has been fascinating to see the amazing diversity of our wonderful tourism product and humbling to see the passion and enthusiasm of those who promote it.

Throughout my tenure, I have met and visited tourism businesses and destinations the length and breadth of the country, been privileged to represent UKinbound at the very highest levels within Government and have been fortunate enough to work with fantastic colleagues.

Growing our membership was my number one priority when I joined UKinbound while also ensuring that new members could provide business opportunities and contacts. I am delighted that we have achieved an increase of over 30% in membership numbers since 2014.

Increasing the visibility of the industry and 'voice' was another priority and I have represented the industry at over 100 events, conferences, debates and media interviews. I was delighted that UKinbound secured a 'seat at the table' on the Tourism Industry Council and played a role in the development of the Tourism Sector Deal – a piece of work vital for the growth of our industry.

The Association has now also established relationships with a wide range of MPs through our CEO roundtables, parliamentary receptions and the launch of our recent lobbying campaign, and I am hugely encouraged by the interest and support we have seen from parliamentarians.

I have also been pleased that we have developed and delivered so many high-quality events for our members across the UK during my time. The past 12 months have seen Discover events in the Scottish Highlands and York, our Annual Convention in Cardiff, a General Meeting in Brighton and networking events in Bristol, Liverpool and Edinburgh.

Creating more opportunities overseas has been a key aim of mine, so I was delighted that in this membership year we have been able to organise a short sales mission to Germany in partnership with b2me, and host the UK stand at Arabian Travel Market in Dubai.

In my many engagements with the media and with politicians, and in the many presentations I have made at conferences up and down the country, I have often talked about our industry as a people industry. And while I am proud of the activities we have delivered over the past four years, I am prouder still of the people that make up UKinbound. I have been privileged to lead a team of professionals who are as passionate about tourism as they are about delivering a quality service to our members. I have been hugely supported by our current Chairman, Mark McVay, and past Chairman, Rita Beckwith, and successive Board members, who have donated their time, expertise and good counsel to support me and my team.

But it is to you, the members, that I must also say a huge thank you. Thank you for your support to me and the Secretariat; thank you for your support for the Association and for all you do to make tourism the UK's fastest-growing service industry. I know that I am leaving my team, my Board and the Association in good hands.

Deirdre Wells OBE,
CEO

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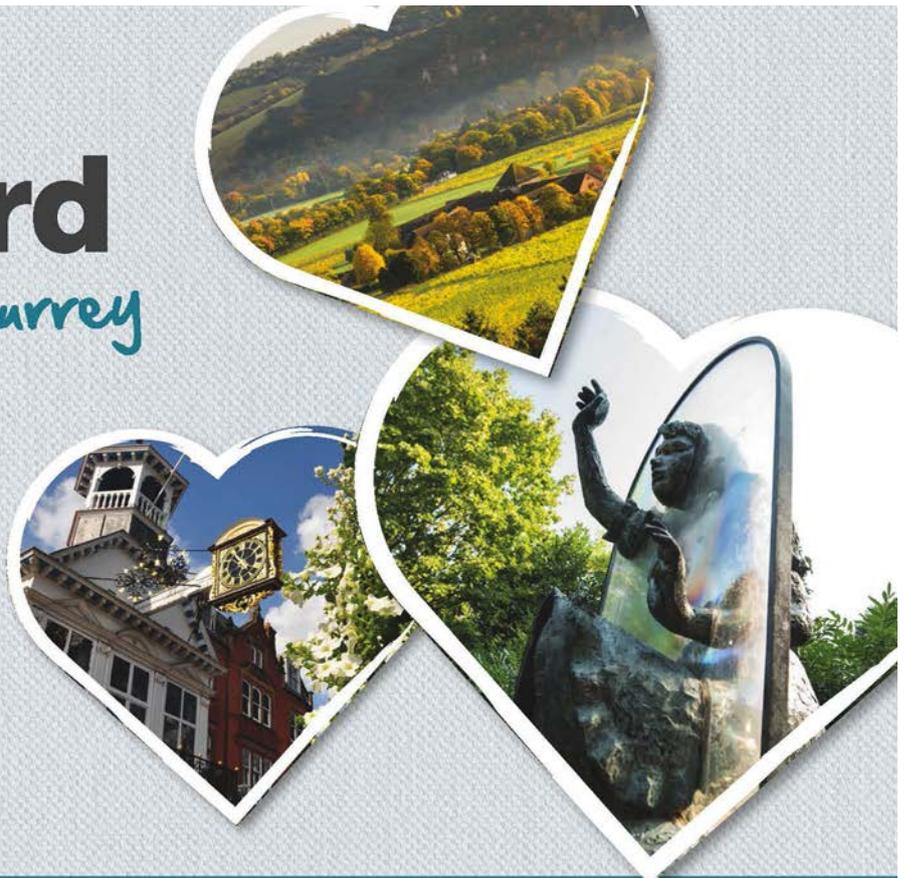
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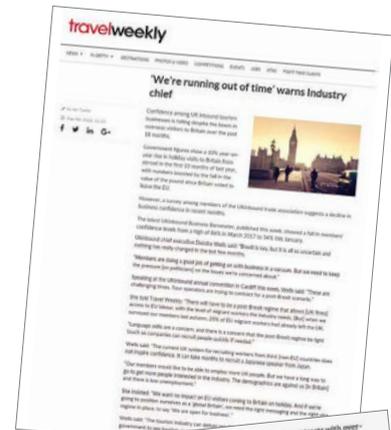


MACDONALD
HOTELS & RESORTS

MARKETING & COMMUNICATIONS UPDATE

During the past 12 months, the Public Affairs & Communications team at UKinbound has:

- Launched and rolled out a new website that is mobile friendly, more informative for all users, easier to navigate and consistent with our branding
- Achieved over 350 pieces of media coverage with an equivalent advertising value of £2 million
- Increased our presence on Twitter and LinkedIn by 30%. Our Twitter feed now has over 3,500 followers and our LinkedIn page over 1,500 followers. If you haven't done so already, please sign up to our social media channels to get live updates on all our activities
- Sent out a biweekly Members Newsletter, regular Industry Roundups, and a monthly 'Out & About' update to keep our members informed about what's happening within the membership, the wider industry and what the Association has been up to on our members' behalf. New newsletter templates have also been rolled out so that our branding is consistent across all our communications
- Developed and produced magazines for World Travel Market and Arabian Travel Market, a brochure for our Annual Convention in Cardiff and our Annual Members' Directory
- Sent out 24 bespoke mailings on behalf of our members to promote their products, services and events, with an average open rate of 25%
- Written regular columns for Group Travel Organiser and Group Travel World to inform the industry about UKinbound's activities and provide an additional marketing opportunity for our members



For further information about marketing and communications, please contact:

Antonia Stratford, Head of Public Affairs and Communications
antonia@ukinbound.org or

Cindy Ng, Assistant Marketing and Commercial Manager
cindyng@ukinbound.org

POLICY UPDATE



There has been significant progress during the past 12 months across many of the key policy areas that affect the inbound tourism industry, although Brexit has, of course, continued to dominate the industry and the Association's lobbying priorities.

BREXIT

We have taken every opportunity we can to present the industry's key priorities to Government, media and other key stakeholders during the Brexit negotiations. These are: strong promotion of the UK as a welcoming destination; frictionless travel between the UK and EU; continued access to the Single Market, Customs Union and Open Skies Agreement and protection for EU workers.



However, like many other industries across the UK, our members have become frustrated at the lack of apparent progress and clarity for businesses. Key questions our members are starting to ask are: will tourists from the EU have to secure a visa to come to the UK post-Brexit? How will the industry replace its valued EU employees and, more specifically, their advanced language and customer service skills when we leave? This is why we launched our campaign on 19 June to raise awareness of these issues and seek clarification from ministers, and we were delighted at the number of MPs who turned up to support us and by the regional broadcast and print media coverage that was generated.

SECTOR DEAL

CEO Deirdre Wells played a key role in developing the Tourism Sector Deal which was submitted to ministers in January. She headed up the 'Connectivity' workstream within the Deal, which developed ideas and plans to improve the UK's transport infrastructure for tourists, and in particular the 'final mile' experience to many attractions in the UK. A Deal is expected to be secured and announced in the next few months.

TRANSPORT

We were pleased at Parliament's decision in June to approve the third runway at Heathrow and will keep on urging Government to move forward swiftly with this project and to consider expansion at Gatwick in the future. We will also continue to lobby Government to do all it can to build a world-class transport infrastructure that is more travel-trade friendly.

VISAS

The new low-cost Chinese Visitor Visa pilot ended in January and Government is due to evaluate and publish the results of this pilot shortly. The Association is keen that this reduced-cost Visa continues and has also worked closely with the Royal Commonwealth Society and other key stakeholders in the past 12 months to urge Government to replicate the scheme for our Indian visitors.

JOBS AND SKILLS

Our members have told us that they continue to experience challenges with recruiting and retaining EU staff since the EU Referendum – something which is particularly concerning for tour operators who need staff with excellent language skills to help grow their business. We therefore made addressing this issue the main focus of our report for this year's Parliamentary Reception.

We also continue to do all we can to encourage our young people to make tourism their career of choice and will be developing a new award specifically for apprentices and young people that will be launched at our Annual Convention next February.

AIR PASSENGER DUTY

UKinbound continues to be an active member of the 'A Fair Tax on Flying' group and was delighted that in its Spring Statement, Government committed to a review of the impact of APD (and VAT) in Northern Ireland. A response was submitted by the 'A Fair Tax on Flying' group in May and we await Government's response.

For further information about our lobbying activity, please contact **Antonia Stratford**, Head of Public Affairs and Communications antonia@ukinbound.org





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MEMBERSHIP UPDATE

We are delighted that more than 50 new members have joined us in the past 12 months, bringing our total number to just under 390.

Despite the growth in numbers, our Membership team are keen to maintain our strong principle of providing a personal service to all our members. To that end, the team has been busy out and about visiting members right across the UK. Visiting our members at their place of business really helps the Membership team and the rest of the Association to gain an insight into the key issues affecting our members. From practical advice on how to maximise the business benefits of membership and build new connections, to raising policy issues with Government, we stand ready to do all we can to support you, the members, whatever your business or location.

If you would like to meet with our Membership team, please do get in touch by emailing [Antony Amos \(antonyamos@ukinbound.org\)](mailto:antonyamos@ukinbound.org), [Matthew Corcoran \(matthew@ukinbound.org\)](mailto:matthew@ukinbound.org) or [Karen Jacques](mailto:karen@ukinbound.org) in our Scotland office (karen@ukinbound.org).

HOW TO GET THE MOST FROM YOUR MEMBERSHIP

Don't forget to take advantage of the following **FREE** member benefits:

- Bespoke support and guidance from the UKinbound Secretariat
- A chance to feature your company profile on the UKinbound website and in the Members' Directory
- Attend events taking place across the UK to make new business contacts and strengthen existing ones
- Access enquiries from overseas agents, exclusive industry insights and Legal, Taxation, HR, Training and Marketing experts via our website
- Promote your business with a news story in our monthly Members' News or on our new website in our Corporate Partners section (Corporate Partners only)



Members have made an average of 15 new business contacts in the past 12 months through UKinbound

QA RESEARCH

OVERSEAS ACTIVITY

Growing our members' overseas business is a key priority for the Association and this year saw a step change in our international activity.

In addition to hosting our first overseas sales mission to Frankfurt in Germany last December, we were also delighted to provide the UK presence at Arabian Travel Market in Dubai, which was a tremendous success. Twenty four businesses joined us on our stand this year and pods will be going on sale soon for 2019! Please get in touch if you would like to exhibit with us next year.



CASE STUDY

Joining UKinbound has been like gold dust for our business. The networking events and the excellent Annual Convention have become vital to our sales and marketing strategy.

As a small, high-growth business, all spend has to be carefully considered and generate a worthwhile return on investment. We met three of our clients through UKinbound, and have found the team to be extremely welcoming, friendly and helpful in making connections and distributing news about our company.

CHINA TRAVEL OUTBOUND



SCOTLAND

MEMBERSHIP

Karen Jacques, UKinbound's new Business Development Manager in Scotland, took over the reins from Andrew Macnair in November last year and has welcomed several new members from across the Scottish tourism industry since taking over.

Our Scotland office not only provides support to members based in Scotland, but also to those based elsewhere in the UK whose businesses have a presence in Scotland or bring inbound business to Scotland.

EVENTS

We held a successful Discover workshop in the north of Scotland last November where we worked in partnership with Moray Speyside Tourism, Highlands and Islands Enterprise and VisitScotland. More than 20 tour operators met with local suppliers in a B2B workshop and also took part in familiarisation trips.

UKinbound Scotland held its first seminar in May on Commercialising Your Attraction, which was kindly hosted by Hard Rock Cafe Glasgow. The event was well attended and the appetite for topical seminars by Scottish members is growing – we will look to do more in the future.



As in previous years, UKinbound has also worked closely with other industry partners during the year, in particular with VisitScotland. VisitScotland invited Tour Operator members to attend VisitScotland Expo 2018 in Glasgow – Scotland's leading tourism event.

Networking events for members continue to be extremely popular in Scotland. These informal events get great engagement and prove to be a very effective way to meet other members and develop new business opportunities.



LOOKING AHEAD

During the next 12 months, UKinbound looks forward to continuing to support both its members based in Scotland and those based elsewhere, who are working in Scotland. We will be holding more member networking events and plan to hold another seminar. Our next Discover workshop takes place in Aberdeenshire in October and, most excitingly, the UKinbound Annual Convention is coming to Glasgow in February 2019.

If you would like to contact our Scotland office, please email karen@ukinbound.org

EVENTS UPDATE

In the past 12 months, the Events Team has organised over 30 events, including hosting the UK stand at World Travel Market and Arabian Travel Market, our Annual Convention, Familiarisation Trips, Member Networking Evenings, Market Seminars, Discover Events and our annual Summer Ball.



World Travel Market (WTM)



John Glen MP at WTM

More than 50 UK tourism businesses exhibited with UKInbound at World Travel Market (WTM) in November and the majority of respondents to our survey after WTM said that they had made 25 to 50 new contacts during the course of the show. We were grateful to former tourism minister John Glen MP for attending the exhibition, visiting our stand and speaking with members during WTM.

Our members also enjoyed a Gala Dinner during WTM which was held in the wonderful Shakespeare's Globe theatre in London and attended by more than 200 industry representatives.



Our members at the Watershed in Bristol



Our members at Liverpool Football Club

Our members have attended Members Networking Evenings in Bristol courtesy of Destination Bristol and at Liverpool Football Club. Other Networking Evenings have also been held in Manchester, Glasgow, Edinburgh and London.

During the past 12 months, familiarisation trips were held at The London Cabaret Club; in Bath, Bristol, Ullswater and Bletchley Park; in Nottinghamshire with the Mayflower 400 team; at the Hard Rock Cafe in London; at the Handel & Hendrix in London museum in partnership with London Luxury Quarter by Appointment; the Royal Horticultural Society and Thames River Services.



Our members attending our Southeast Asia seminar



Our members enjoying a fam trip to the Bishop's Palace and Gardens, Wells

Seminars were held on ticketing, the USA, GDPR, the Nordics and the Gulf Co-operation Countries (GCC) in order to keep our members up to date with the latest conditions, updates and trends.

Discover events have also been held in Nottinghamshire, London, Moray Speyside, York and Kent, providing an exceptional opportunity for our Tour Operator members to meet with local suppliers and develop products in a host of UK destinations.



Speakers at our Annual Convention

UKInbound's celebratory Summer Ball was held once again within the stunning grounds of The Hurlingham Club in London. A wonderful evening was had by all and we raised more than £3,000 for our charity partner, Shaw Trust.

CASE STUDY

World Travel Market is one of our major trade events in the calendar year, so getting as much out of the event is critical to our plans. Exhibiting with UKInbound for the past few years has been a massive success as the footfall we receive is always high, our location is perfect and the pods look excellent.

UP AT THE 02



Our members at our Summer Ball

If you have suggestions for events that would benefit your business, or you would be interested in hosting one, please email events@ukinbound.org

ANNUAL CONVENTION



2018 – LOOKING BACK AT CARDIFF

The 2018 Annual Convention, held in Cardiff, was a great success. With the highest number of delegates attending to date, the event presented our members with many invaluable opportunities for informal networking and business development.

Our theme for Convention was ‘What’s Next for Tourism?’, which we felt captured the current mood in the industry with regards to the political and economic uncertainty both in the UK and globally. Delegates heard from leading industry speakers, attended topical seminars and took part in familiarisation trips in Cardiff and the rest of Wales. A CEO roundtable was also held which discussed some of the key issues currently affecting the inbound industry. Our annual Awards for Excellence Gala Dinner was held in the beautiful National Museum Wales, where guests were treated to an exhibition of the largest collection of Impressionist paintings outside Paris and singing from one of Wales’s renowned male-voice choirs.

2019 – LOOKING FORWARD TO GLASGOW

The 2019 Annual Convention will be held in Glasgow from 6 to 8 February and will be hosted by Glasgow Life with support from Glasgow City Council, Glasgow Airport, Glasgow Chamber of Commerce, VisitScotland and Scottish Enterprise.

UKinbound members will enjoy two days of thought-provoking debates, seminars and plenary sessions. There will be plenty of networking opportunities, including a major B2B Workshop and our fabulous black-tie Gala Dinner at which the winners of the Association’s annual Awards for Excellence will be announced.

UKinbound is delighted to be holding the Convention in Glasgow – officially the world’s friendliest city! The city has world-class visitor attractions, diverse neighbourhoods, stunning architecture, an ever-evolving food and drink scene and legendary nightlife. UKinbound is looking forward to working with Glasgow Life to help showcase the quality and diversity of Glasgow’s tourism offer and reinforce the city’s position as one of Europe’s leading visitor destinations and the gateway to Scotland.

CASE STUDY

The UKinbound Convention is brilliant for me to promote my museums to the group and FIT market. It happens at the right time of year when it is easy for me to get out of the office and, at just under £600, it provides great value for money for the B2B and networking sessions. The team makes everything so easy for you, too, by providing accommodation and refreshments throughout the course of the Convention. It’s the perfect mixture of business and fun!

ROMAN BATHS AND FASHION MUSEUM

A black and white photograph of two men celebrating at night. They are both shouting with their mouths wide open and holding up lit sparklers. The background shows a city skyline with lights. The overall mood is one of excitement and joy.

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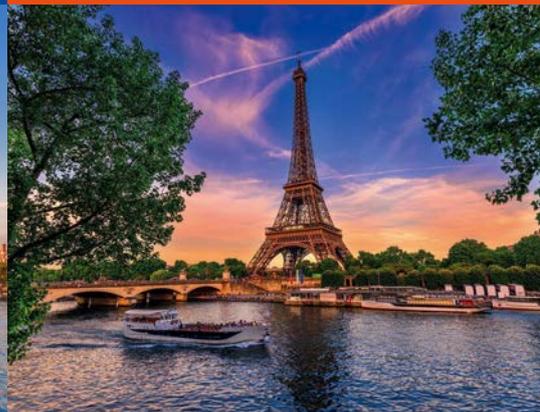
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