



# UKINBOUND

THE VOICE OF INBOUND TOURISM

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## A YEAR IN REVIEW 2018/2019









# WELCOME FROM THE CHAIR

It is a great pleasure to welcome you to our *Year in Review*.

I took over as Chair of the Association during our flagship event, the Annual Convention in February, which this year was held in Glasgow. It was wonderful to have it back in my homeland of Scotland! During the Convention, I outlined my priorities for the Association, which were to try and help more young people enter the inbound tourism industry, widen the Association's membership across the UK and ensure that our industry continues to receive the respect it deserves within the Government and across all political parties. I will do my best to implement these over the coming months and years.



Since taking over as Chair, I've tried to attend as many of UKinbound's events as possible, and recently spent a memorable networking evening on the Firth of Forth – always good to remind yourself about the fantastic product right on your doorstep.

As well as attending events, I have also worked with our new CEO Joss Croft, and members of the secretariat, to highlight and push forward key policy issues that are impacting or are likely to impact the industry.

The main advocacy issue over the last 12 months has, of course, been Brexit. As a business owner, I understand that the sooner a decision is made about the UK's future relationship with the EU the better, so that we can all start to move forward. I know that the secretariat has taken every opportunity to push out relevant information to members and we will continue to urge the Government to do all that they can to reassure our international visitors that the UK continues to be 'open for business'. Although the impact has been less dramatic than we all feared, it is certainly not the image we wish to have of the UK portrayed around the world.

I know that, in our industry, staff recruitment and retention can be challenging. This is why my board and I took the decision to commission a new piece of research – once again in partnership with Canterbury Christ Church University – that will look at our workforce and how proposed restrictions on immigration could affect staffing and skill levels. This report will be released at the end of the summer and I look forward to sharing the results with you.

Of particular interest to me is Air Passenger Duty (APD). As many of you will know, the UK has one of the highest levels of APD in the world. Sustainability issues, of course, have to be considered, but evidence shows that cutting APD will increase visitor numbers (and hence spend) and support the creation of new jobs – vital in a post-Brexit world. So, I was disappointed by the Scottish Government's decision earlier this year to go back on its decision to cut APD. Going forward, UKinbound will continue to work with the rest of the industry to find out how best to try and secure a cut to this damaging tax.

I am also disappointed by the Scottish Government's decision to pursue a Transient Visitor Levy which, again, I think will be damaging to the visitor economy. It does seem that politicians are happy to say they are supporting tourism whilst putting up even more barriers. We will be responding robustly to the consultation in due course.

I anticipate that the next 12 months will be a mixture of business as usual and, no doubt, a few political surprises. I hope that by this time next year we will be in a position to look forward to a more normal political agenda and focus on making the United Kingdom a leading destination for tourism.

Best wishes for a successful and productive summer and rest of the year.

A handwritten signature in black ink that reads "James Aitken". The signature is fluid and cursive, written over a light grey background.

**James Aitken,**  
Chairman



# WELCOME FROM THE CEO



I am delighted to welcome you to my first foreword in UKinbound's *Year in Review*.

It has been a busy time since starting the role last November; with a General Meeting taking place within my first 10 days and our Annual Convention taking place eight weeks later! However, thanks to the support of the Board (both old and new) and my team, it was a great start and an even better way of getting to know the Association and all of you as quickly as possible. It is also clear that I have inherited the Association in great shape from former CEO Deirdre Wells OBE, and I intend to build upon her achievements and successes going forward.

Our membership numbers are at a record high, which is fantastic. I would like to keep growing the organisation but I am mindful that this should not be at the expense of losing the personal touch with our members, or see a decline in our strong customer service levels, both of which I think are big strengths of the Association.

Another ambition of mine is to continue to help our members run successful, profitable businesses. We are currently looking at a range of new international business opportunities and researching how we can help those members who are based outside of London to access all our events. We know that we need to ensure that membership of UKinbound drives solid returns on investment.

Increasing the visibility of the industry and its 'voice' is, of course, another of my key priorities. Particularly as the industry is currently facing a number of challenging issues, including high levels of taxation, the impact of Brexit, recruitment, and skills challenges. I have

already represented the industry at more than 20 events, conferences, panel debates and media interviews, and also attended meetings of the Tourism Industry Council.

I am delighted that the sector deal for Tourism has been secured with the Government, and I look forward to working in partnership with VisitBritain and other stakeholders to deliver the deal, which is vital for the future health and growth of our industry.

I am very pleased that, during my short time with UKinbound, we have developed and delivered so many high-quality events for our members across the UK. The last 12 months has seen Discover Workshops in Kent, Windsor, Aberdeenshire, Salisbury and The Heart of England, our Annual Convention in Glasgow, General Meetings in Hertfordshire and London and networking events in Bath, Liverpool, London and Edinburgh. It was also great to join the team at World Travel Market before I officially joined the Association and then travel with the team to host and manage the UK stand at Arabian Travel Market in Dubai.

I look forward to continuing to work with UKinbound and its members. Please don't hesitate to get in touch if you would like to discuss your membership or if I can help in any way.

Best wishes,

Joss Croft, CEO



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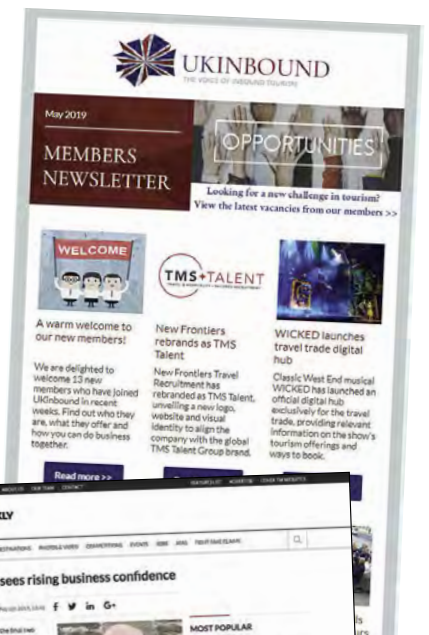


MACDONALD  
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# MARKETING AND COMMUNICATIONS UPDATE

During the past 12 months, the Marketing team at UKinbound has:

- Seen an increase of 25% in visitors to the UKinbound website since its launch in May 2018. We have also incorporated new features such as a search and filter function in the online Member Directory
- Achieved more than 286 pieces of media coverage with a reach of over 35 million. More than half were secured through our press releases and all coverage secured was positive or neutral in tone
- Increased our presence on Twitter and LinkedIn. Our Twitter feed now has nearly 4,000 followers and our LinkedIn page nearly 3,000 followers
- Sent out a members newsletter twice a month to help members promote their latest news and updates and keep the membership informed of new developments within the industry
- Sent out a bimonthly industry update to keep members informed of the latest policy developments and a quarterly 'Out and About' newsletter
- Produced magazines for World Travel Market and Arabian Travel Market, a brochure for our Annual Convention in Glasgow and our Annual Members' Directory. New for 2019 was a map of the UK featuring our attraction members which we distributed to our Tour Operator members to give to their clients
- Sent out 35 bespoke mailings on behalf of our members to promote their products, services and events with an average open rate of 27%.



For further information about marketing and communications, please contact:

**Cindy Ng, Head of Marketing**  
cindyng@ukinbound.org



# POLICY UPDATE

Whilst some progress has been made during the last 12 months across the key policy areas that affect the inbound tourism industry, Brexit has continued to dominate the Association's lobbying priorities.



## BREXIT

The future of the UK's relationship with the European Union is still unclear, but the industry does now have clarity on several key areas that impact on travel to the UK. Deal or no deal, EU visitors will not have to secure a visa to come to the UK (and vice versa), instead an ETIAS (European Travel Information and Authorisation System) scheme will be put in place, which will be similar to the ESTA scheme in the US. An aviation agreement has also

parliamentarians, but with the narrative around sustainability changing substantively in 2019, this is requiring UKinbound and the group to think differently going forward about how to lobby on this issue. A new APPG on APD was established in Spring 2019 and UKinbound submitted evidence to its first inquiry in July.

UKinbound has been closely monitoring Scotland's plans to implement a new Tourism Transient Levy. The Local Government Association is also considering how this tax might be introduced in England and Wales. UKinbound submitted its position to the Hospitality APPG in April which stated that the Association is not in favour of the tax but if one were to be implemented then the funding raised by the tax has to be reinvested in tourism services or services that indirectly impact tourism services.

## VISAS

The low-cost Chinese Visitor Visa, which was launched in early 2016, is still in place and we will be lobbying for a similar cost reduction in visitor visas for our Indian visitors. Members have also been in touch throughout the year about some of their difficulties with securing visas for their clients and we have acted swiftly to put them in touch with the Home Office.

## JOB AND SKILLS

In December 2018, the Government published its Immigration White Paper. Of most concern to the industry is the proposal to restrict immigration from the EU to those earning a salary of £30,000 and above. So, the decision was taken to commission a piece of research in partnership with Canterbury Christ Church University, and other tourism associations, that will provide the industry with the evidence and data that is needed to argue for an exemption.

## SAFE AND LEGAL CAMPAIGN

UKinbound has joined a campaign group 'Safe and Legal', which is lobbying for sharing economy tourism businesses to have the same regulations as other tourism businesses. The group is pressing for a roundtable with the Government to discuss how the recommendations from the Inquiry into The Sharing Economy that the APPG for Tourism, Leisure and the Hospitality APPG produced in summer 2018 can be taken forward.

## SECTOR DEAL

A deal has been secured with the Government and we look forward to working with VisitBritain and other partners to help deliver the deal. It contains key ambitions such as improving connectivity, productivity, creating new Tourism Zones and launching a 10-year Skills Campaign to encourage more people to work in the industry.

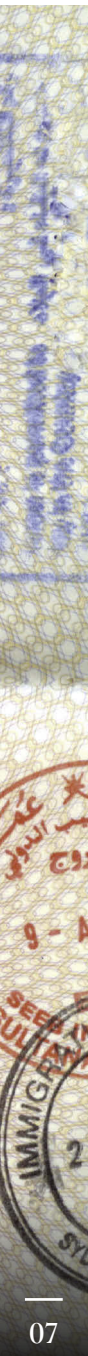
## TAXATION

UKinbound continues to be an active member of the 'A Fair Tax on Flying' group, which campaigns for a reduction in Air Passenger Duty. Awareness of this tax and its impact on the tourism industry has certainly increased amongst



been put in place so that planes will still fly between the UK and the EU even in the event of a no deal. We also know about arrangements for driving in the UK post-Brexit and rights for EU workers. Over the last 12 months, we have pushed out relevant information to our members on Brexit. We will carry on doing this and take every opportunity we can to present the industry's key priorities to the Government, media and other key stakeholders as the negotiations continue.

For further information about our lobbying activity, please contact **Antonia Stratford**, Head of Public Affairs [antonia@ukinbound.org](mailto:antonia@ukinbound.org)





# All the world's a stage...

As You Like It - William Shakespeare



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▲ Shakespeare's Birthplace



▲ Ettington Park Hotel



▲ Warwick Castle

▼ The MAD Museum



▲ Hall's Croft




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# MEMBERSHIP UPDATE

We are delighted that over 70 new members have joined us in the last 12 months, bringing our total number to just over 400 – the largest membership community we have ever had!

Engaging regularly with all of our members across the UK remains a top priority so the Association can continually improve and develop its offer for existing and potential members. This is why CEO Joss Croft took the decision to appoint Nathan Alemany as our representative in the North West this year.

Over the last 12 months, we have seen how an increasing number of sectors are recognising the value of tourism as a way to grow their business – particularly restaurants. We have also seen significant growth in Destination Marketing Organisations joining the Association.

During the membership year we have worked with our Tour Operator members to get detailed information on their markets so we can pass new business enquiries to them quickly. We have also supported our new members by organising two Membership Masterclasses and planning a new ‘buddy’ system for our events.

We are grateful to all those members that completed our membership survey in April which has provided us with valuable insights. We now know that our tour operators are keen to see more accommodation providers in membership – particularly those that can accommodate groups – and so this will be a key focus for the Association going forward.

We also learnt that some of our members based outside of London find it hard to access our events. We will be updating members soon on provision of webinars and recordings of our events in the coming membership year.

**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)), Nathan Alemany ([nathan.alemany@ukinbound.org](mailto:nathan.alemany@ukinbound.org)) or Affton Smith ([affton.smith@ukinbound.org](mailto:affton.smith@ukinbound.org)).**



*Members have made an average of 25 new business contacts in the past 12 months.*

QA RESEARCH

## OVERSEAS ACTIVITY

Growing our members' overseas businesses continues to be a key priority for the Association and we are currently considering opportunities (particularly in China) that will help to increase business for our members.

Once again, we were delighted to host the UK stand at the Arabian Travel Market in Dubai, which was a great success. More than 20 businesses joined us on our stand this year and pods will be going on sale soon for 2020! Please get in touch if you would like to exhibit with us next year.

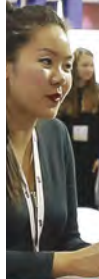
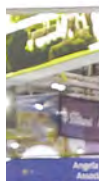


*Joining the UKinbound stand at ATM Dubai was both commercially beneficial and stress-free, giving huge exposure to major markets at minimal cost. Well planned and delivered.*

ANGELA SHANLEY ASSOCIATES

*This was our first year attending and exhibiting at ATM and the whole process was very simple. UKinbound made the booking, deliveries and pre-show information as clear as possible and then were a great help during the days at the exhibition.*

UP AT THE O2





# SCOTLAND

## MEMBERSHIP

The UKinbound community in Scotland has continued to grow and thrive over the past year. Karen Jacques, Business Development Manager for Scotland, has been a part of the UKinbound team for 18 months now and has spent the last year working with existing members and bringing on board new members from all segments of the industry.

UKinbound's office in Scotland also continues to support not only members based in Scotland but also those based elsewhere whose businesses have a presence in Scotland or bring inbound business into Scotland.

## EVENTS

We held a very successful Discover event, in partnership with VisitAberdeenshire and VisitScotland, as well as a number of our members and local suppliers, in October 2018. The event showcased this part of Scotland and all it has to offer to tour operators through familiarisation trips, networking and a 1:1 workshop. It was great to hear about new Aberdeenshire product.

UKinbound has also continued to work closely with other industry partners during the year – in particular with VisitScotland and Glasgow Life. In the run-up to our Annual Convention in Glasgow in February, we helped to support Glasgow Life and their member businesses so that as host city they were travel trade ready in order to showcase their products in the most effective way to the industry.

Networking events for members have continued to be extremely popular in Scotland



and it has been good to see members from the North of England and down as far as Liverpool come and join in these events. The events provide great opportunities to meet industry colleagues, develop networks and partnership opportunities. We have held events this year at Edinburgh Castle, Le Monde and even ventured out on the water with Forth Boat Tours (yes, in Scotland, but we did wait until June!)



Kelvingrove Art Gallery and Museum

## 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 throughout the course of the year and are looking forward to our Tay Country Discover event in September.

If you would like to contact our Scottish office, please email Karen Jacques on [karen@ukinbound.org](mailto:karen@ukinbound.org)



# EVENTS UPDATE

In the past 12 months, the team has organised over 40 events, which included hosting the UK stand at World Travel Market and Arabian Travel Market, our Annual Convention, Familiarisation Trips, Member Networking Evenings, Market Seminars, Discover Workshops, and our annual Summer Ball.



Members on the Up at The O2 fam trip

More than 50 UK tourism businesses exhibited with UKinbound at World Travel Market (WTM) in November, and the majority of survey respondents said that they had made 25 to 50 new contacts during the course of the show.

Our members also enjoyed a Gala Dinner during WTM, which was held in the wonderful Imperial War Museum and attended by more than 200 industry representatives. Members also attended Members Networking Evenings in Edinburgh, London and Bath, and we organised two new events for members in London – B2B speed networking and a Membership Masterclass.



Michael Ellis MP at WTM

During the last 12 months, fam trips have taken place in Durham (with a visit to the open-air show – *Kynren – an epic tale of England*), the Wildwood Restaurant and Edinburgh Castle, Up at The O2 and MBNA Thames Clippers in London, as well as key attractions in Portsmouth, Liverpool, Oxfordshire and Buckinghamshire, and the Brooklands Museum.

Seminars were held on digital marketing, the Americas and Germany in order to keep our members up to date with the latest conditions, updates and trends. New Business Development Manager Nathan Alemany also organised two new workshops in the Lake District – *Inbound Tourism Marketing Essentials*.



Our members at our Summer Ball

Discover Workshops have also been held in Windsor, Aberdeenshire, Salisbury and the West Midlands. The workshops have provided an exceptional opportunity for our Tour Operator members to meet with local suppliers and hear about new products for their clients. UKinbound has also supported some of the Discover England Fund projects by inviting Tour Operator members to visit and sample England's Literary Greats and US Connections and the England Originals itineraries. We also joined forces with sister organisation the European Tour Operators Association (ETOA) to secure a discount for members at their Britain and Ireland Marketplace.

UKinbound returned to the stunning setting of the Honourable Artillery Company in London for its celebratory Summer Ball in June. A wonderful evening was had by all and we raised more than £3,000 for our charity partner, Shaw Trust.



Members enjoying a fam trip to County Durham

*We have been a member of UKinbound for 10 years and see it as an essential part of maintaining our relationships with the travel trade, which is so vital in this industry. The events programme, particularly WTM, is a huge part of maximising the membership and we attend as much as possible, as well as aim to host at least one event per year. We are delighted to be hosting the Annual Convention in 2020 and working even more closely with UKinbound.*

DESTINATION BRISTOL

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





# ANNUAL CONVENTION



Annual Convention 2019, Glasgow

The Clifton Suspension Bridge, Bristol

## 2019 – LOOKING BACK AT GLASGOW

The 2019 Annual Convention held in Glasgow 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 was ‘The Future for Tourism?’, capturing the mood in the industry with regards to political uncertainty in the UK. Delegates heard from top industry speakers and took part in familiarisation trips around Glasgow. A CEO roundtable also discussed key issues such as Brexit, recruitment and skills challenges, and the role of technology in the industry.

Our annual awards dinner was held in the beautiful City Chambers where guests were treated to a three-course dinner and entertainment from local comedian Des Clarke.

Our CEO was also active on local media as the Transient Visitor Levy proposals for Edinburgh were announced during the convention.

## 2020 – LOOKING FORWARD TO BRISTOL

The 2020 Annual Convention will be held in Bristol from 5 to 6 February and will be hosted by Destination Bristol (Visit Bristol) with support from the Meet Bristol Convention Bureau.

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 Bristol. Creative and colourful, from its brightly painted houses to its contemporary art galleries, Bristol always makes a big impression.

A blend of more than a thousand years of history and innovation, a packed festival and events calendar, a dynamic cultural programme and some of the best food and drink in the UK makes the city a laid-back yet cutting-edge destination.

Nestled between the Cotswolds and the Mendips, Bristol has its own unmistakable identity that flows through the city, sparkling in the rivers and climbing the hills. The city is creative and innovative, producing sporting world champions, Nobel Prize winners and Hollywood stars.





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