



UKINBOUND
THE VOICE OF INBOUND TOURISM

AUTUMN GENERAL MEETING

6 September 2021

WELCOME

James Aitken
Chairman

AGENDA

1. Minutes Review – Chris Ball, General Secretary
 2. CEO Update – Joss Croft, CEO
 3. Industry Update – Kurt Janson, Tourism Alliance
 4. Q&A
 5. Any Other Business
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REVIEW OF MINUTES

Chris Ball
General Secretary

CEO UPDATE

Joss Croft
Chief Executive

WHAT HAVE WE BEEN UP TO? MEMBERSHIP



WHAT HAVE WE BEEN UP TO? EVENTS



design your stay in
Scotland's Tay Country



WHITE CLIFFS COUNTRY

- Great connections to Europe and UK
- World-famous, iconic coastline
- Beautiful countryside
- Warm, dry climate
- Famous history & heritage sites
- New bookable visitor experiences
- Fantastic food and drink offer



whitecliffscountry



VisitBritain update to UKinbound members

Tricia Warwick, Director APMEA, China and NE Asia



Recap: what is TOMS?



An EU scheme to reduce compliance for tour operators and other travel suppliers

It works by taxing the margin in the member state of establishment and denying a recovery of VAT incurred on services to be supplied within the scheme

Therefore, until the end of the Brexit transitional period, a qualifying UK tour operator paid UK VAT on holidays etc enjoyed anywhere in the EU

Compulsory in the UK for B2C supplies and B2B for the use of the client. Wholesale supplies normally excluded and "normal VAT" applied

WHAT HAVE WE BEEN UP TO? **EVENTS**



WHAT HAVE WE BEEN UP TO? **ADVOCACY**



WHAT HAVE WE BEEN UP TO? **ADVOCACY**



WHAT HAVE WE BEEN UP TO? MEDIA



THE TIMES
Covid in Scotland: Tourists hit by 'monopoly' on testing

INDEPENDENT
THE UK GOVERNMENT HAS GIVEN A MASTER CLASS IN HOW TO DESTROY A TOURISM INDUSTRY



The Telegraph

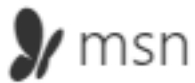
Support the inbound tourism industry, trade body tells Chancellor

216 pieces of coverage
498 million reach

TRAVEL WEEKLY



UKinbound to hold in-person annual convention



Travel restrictions: UK tourism industry warns the Government economy will lose £14bn if businesses close

London risks lost summer unless vaccinated foreign tourists can bypass quarantine, businesses warn

CITYA.M.



UKinbound Presents Five Key Asks to Government Ahead of June 10 Parliamentary Debate on Tourism



ConferenceNews

UKinbound awarded silver sustainability status

PUBLIC SENTIMENT

YouGov

YouGov COVID-19 measures supported tracker: quarantining all inbound airline passengers

% of people in each market/region who say they would support their government: quarantining all passengers on all flights coming into country/region




YouGov

YouGov COVID-19 measures supported tracker: stopping all inbound flights

% of people in each market/region who say they would support their government: stopping all inbound flights coming into country/region




WHAT HAVE WE BEEN UP TO? MARCOMMS





August 2021


MEMBERS NEWSLETTER


A warm welcome to our new members!
Click here to find out more >>






Loganair's new direct services to Scotland and Wales
[Read more >>](#)


ORNC launches new itineraries with AC Group
[Read more >>](#)


North West Wales awarded World Heritage Status
[Read more >>](#)


Bath awarded coveted second UNESCO title


British Airways i360 new Tower Top Climb experience


Johnnie Walker Princes Street to open this September

020 7395 7500 www.ukinbound.org info@ukinbound.org @UKinbound



UKINBOUND

THE VOICE OF INBOUND TOURISM

A YEAR IN REVIEW

2020/21



WHAT HAVE WE BEEN UP TO? MARCOMMS



WHAT'S NEXT?

- Tourism Export Recovery Fund / furlough
- Global Travel Taskforce Review
- Annual Convention 2021 Manchester
- WTM Live and Virtual
- London Business Mayor meeting
- Keeping you informed on Government guidance & industry legislation
- New membership year



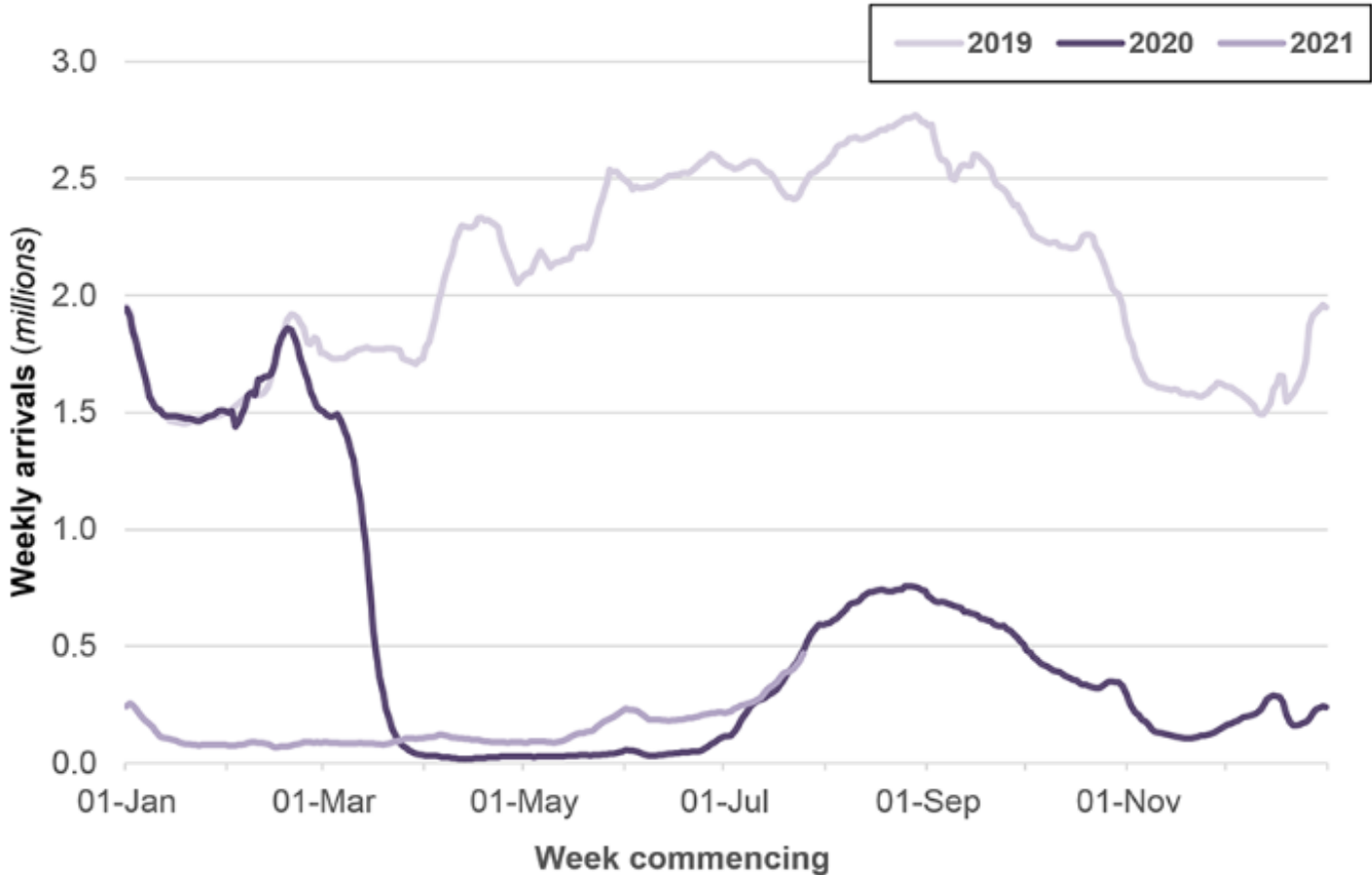
THANK YOU

State of the UK Tourism Industry

Kurt Janson
Director

Current State of Inbound Tourism

Figure 1: Weekly air passenger arrivals to the UK, Jan 2019 - Jul 2021



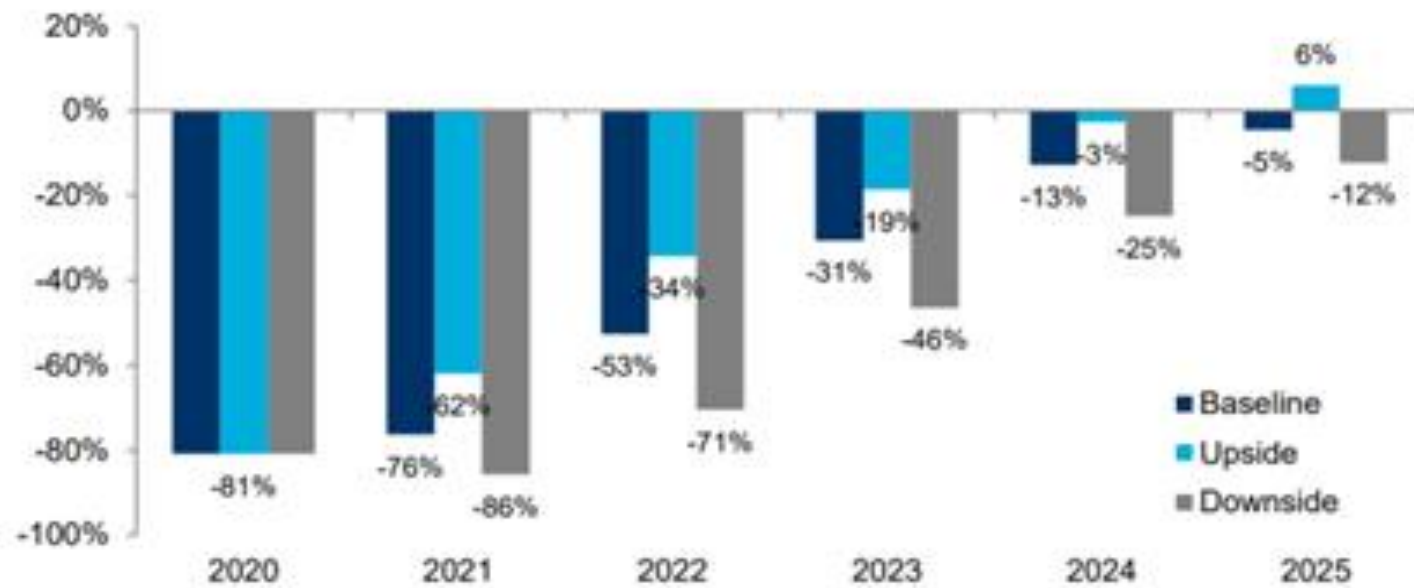
Tourism Employment

- **Still about 1.5m on furlough including about 350,000 in tourism**
- **Only 18% of businesses have all the employees they need**
- **35% of businesses having to increase pay and conditions**
- **33% of businesses having to take on workers without the skills they need**
- **Pushing for EU Youth Mobility Scheme**

Inbound Tourism Projections

Int'l spend by scenario, UK

Relative to 2019 levels

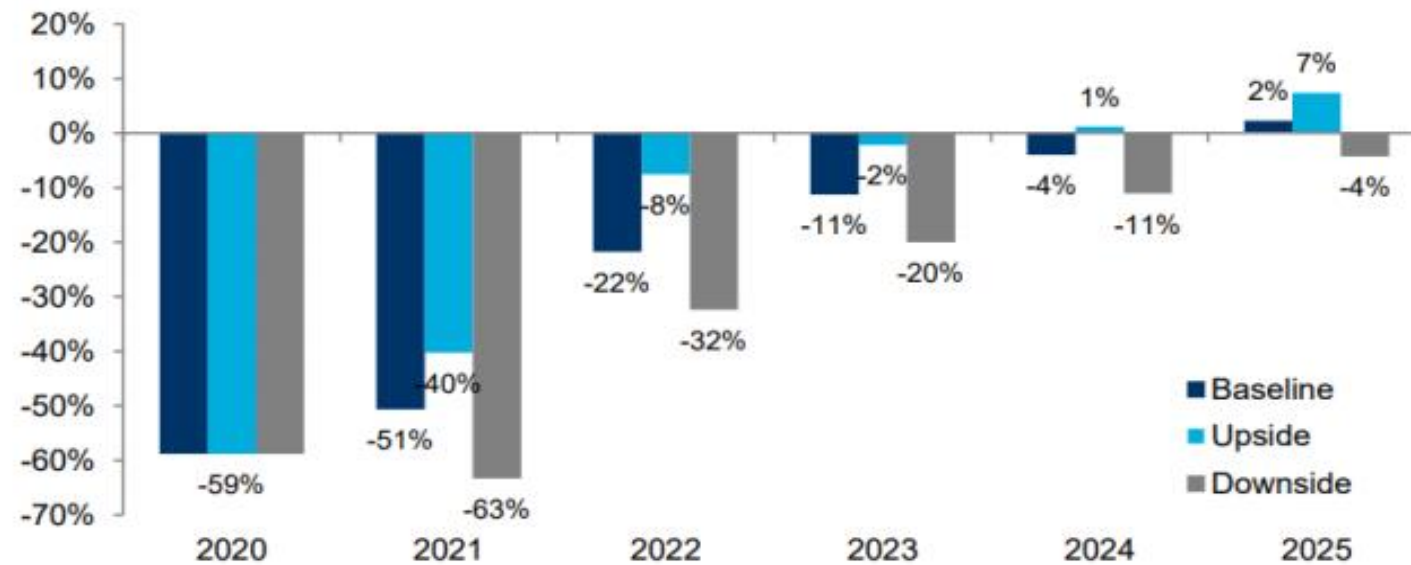


Source: Tourism Economics

Domestic Tourism Recovery

Domestic overnight expenditure by scenario, UK

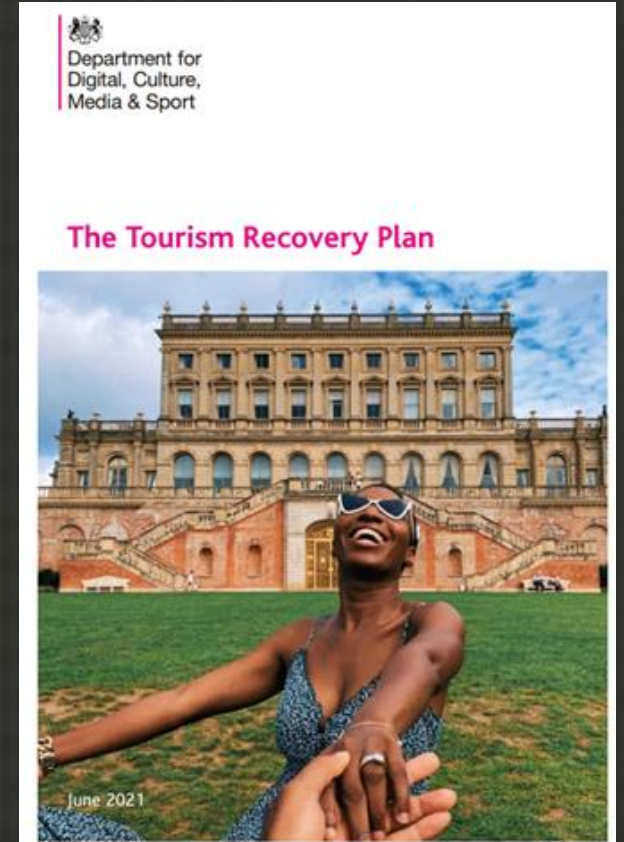
Relative to 2019 levels



Source: Tourism Economics

Tourism Recovery Plan

- Aims to return Domestic Tourism revenue to 2019 levels by the end of 2022
- Aims to return International Tourism revenue to 2019 levels by the end of 2023
- The Minister has stated that this is a “living document”



Prediction vs Requirement

- **Inbound Tourism Recovery by the end of 2023 requires £14bn of additional tourism expenditure.**
- **Recovery by 2023 requires Inbound Tourism to generate £10.8bn in 2021.**
- **Initiatives are needed to generate an additional £4bn in inbound tourism revenue this year**

Initiatives in the Recovery Plan

- **£10m in vouchers from the National Lottery**
- **The development of a Domestic Rail Pass**
- **There is also the prospect of additional resources and initiatives being announced as part of the CSR or Autumn Statement**
- **However, it is obvious that further initiatives will be needed to achieve Tourism Recovery Plan targets**

Possible Initiatives

- Introduction of low cost 5 year visa
- Suspending or lowering APD Rates
- Providing incentives for conference organisers
- Reinstating the VAT Reclaim Scheme and expanding it to cover the EU.
- Using ETAs to stimulate Travel

Collective Passports

- **Could mitigate problems associated with the needs for passports in the EU Youth Market**
- **Relies on a 1961 Treaty which has 19 EU signatories (excluding Germany)**
- **Allows 5-50 people up to the age of 20 to travel on a single document**
- **Home Office has published new guidance on accepting Collective Passports**
- **Still need to know the cost of processing**

Package Travel Regs Review

- Findings due this month
- Seeking a simpler regulations
- Remove Linked Travel Arrangements
- Require Package Travel to include travel
- Any Changes to the Regulation will require a Public Consultation and Legislation
- Need to balance improvements with compatibility with the EU

VAT Lobbying

- **Survey and Modelling Work Commences this week**
- **Aiming at retaining VAT at 12.5%**
- **Will highlight the benefits to Inbound and Domestic sectors**
- **Price Elasticity of tourism to the UK is -1.3, meaning a 1% price reduction = 1.3% increase in tourism expenditure**

State of the UK Tourism Industry

Kurt Janson
Director



QUESTIONS



ANY OTHER BUSINESS