



UKINBOUND
THE VOICE OF INBOUND TOURISM

ANNUAL GENERAL MEETING

22 February 2022

THE
**NATIONAL
GALLERY**



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THE VOICE OF INBOUND TOURISM

WELCOME

James Aitken
Chairman

AGENDA

1. Minutes Review
2. Membership Update
3. Events Update
4. Public Affairs & Communications Update
5. Treasurer's Report
6. CEO Update
7. Julia Simpson, CEO, World Travel & Tourism Council
8. Q&A
9. Any Other Business



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REVIEW OF MINUTES

Chris Ball
General Secretary



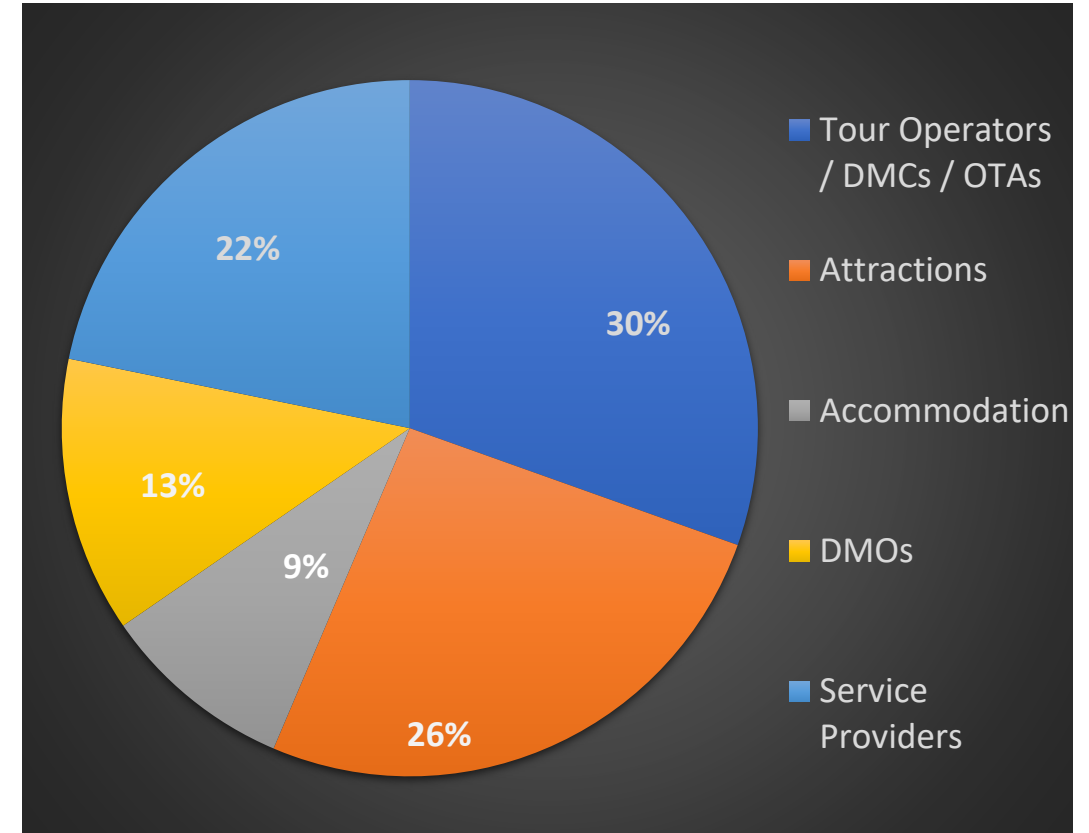
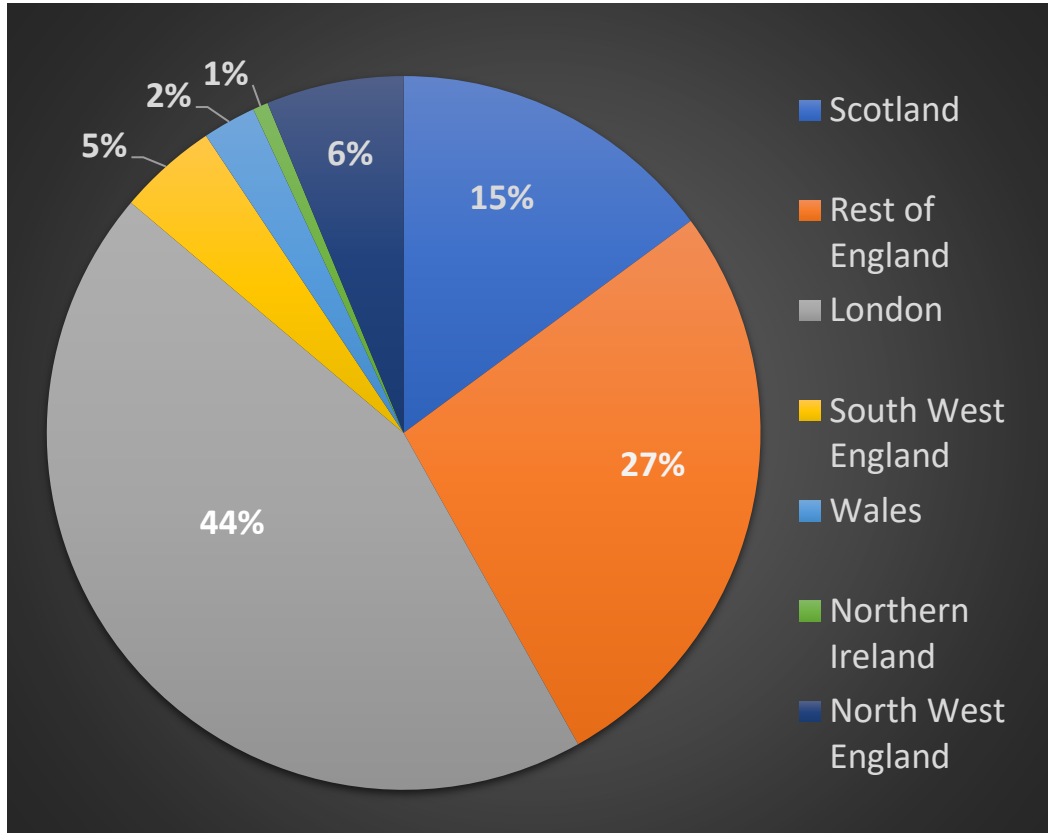
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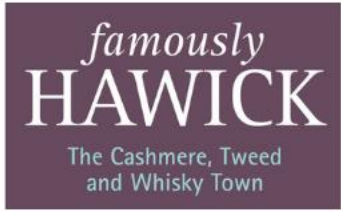
MEMBERSHIP UPDATE

Chris Ball
General Secretary

MEMBERSHIP OVERVIEW

289 Members





KEY MEMBER BENEFITS

- ✓ Networking & making new connections
- ✓ Keep up to date with the latest insights, developments & product knowledge
- ✓ Raise your profile
- ✓ Access to key contacts
- ✓ Showcase your products & services
- ✓ Engage, engage, engage!



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EVENTS UPDATE

Andrew Guthrie
Events Committee Chair

LOOKING BACK AT 2021



OUR ACHIEVEMENTS

40 events in 2021! Including:

- 10** Webinars
- 9** virtual Destination Updates & Fam Trips
- 4** virtual sector-specific roundtables
- 1** virtual CEO roundtable
- 3** General Meetings
- 2** in-person Members' Networking Evenings
- 2** in-person Fam Trips
- 1** in-person Discover Workshop
- 1** in-person Annual Convention in Manchester
- 1** virtual Annual Convention B2B Workshop
- 1** WTM & WTM Virtual
- 1** virtual Membership Masterclass
- 1** virtual Charity Quiz Night



OUR ACHIEVEMENTS

- ✓ In-person events returned!
- ✓ Successful Convention in Manchester bringing the industry back together
- ✓ Busiest stand at WTM
- ✓ Continued with the virtual event programme that included diverse, educational and informative events:
 - Webinars, sector-specific round tables, destination updates and virtual fam trips



OUR PRIORITIES - 2022

- Events to aid recovery of the industry and Association
- Annual Convention in Aberdeenshire on 28-29 September 2022
- Maximising EventsAir
- Continue to increase sponsorship, and maintain important revenue streams for the Association





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PUBLIC AFFAIRS & COMMUNICATIONS UPDATE

Jennifer Cormack
Communications Committee Chair

ADVOCACY ACHIEVEMENTS

 UK Parliament

Committees

[UK Parliament](#) > [Business](#) > [Committees](#) > [Digital, Culture, Media and Sport Committee](#) > [Promoting Britain abroad](#) > [Inquiry](#)

Promoting Britain Abroad inquiry launched

11 November 2021


 Visit Scotland | Alba

[Supporting your business](#) | [Research and insights](#) | [Events](#) | [News](#) | [About us](#) | [Q](#)

For the latest industry information and advice on Coronavirus (COVID-19), including reopening guidance for tourism businesses, visit our COVID-19 advice pages.

[Visit advice pages](#) →



  [Latest news & media centre](#) [Who we are & what we do](#) [Opportunities, campaigns & resources](#) [England Business Advice Hub](#) [England research & Insights](#) [Inbound research & insights](#)

DMC and Inbound Tour Operator Amplification & Distribution Fund

 GOV.UK

Topics

→ [Coronavirus \(COVID-19\)](#) | Latest updates and guidance

Press release

Lateral flow tests to be introduced for vaccinated international arrivals

From 24 October fully vaccinated passengers and most under 18s arriving in England from countries not on the red list can take a cheaper lateral flow test, on or before day 2 of their arrival into the UK. These can be booked from 22 October.

ADVOCACY ACHIEVEMENTS



“UKinbound has been one of the most prominent lobbying groups during the Covid-19 pandemic”



Department
for Transport

Joss Croft
Chief Executive
UKinbound
The Chandlery
50 Westminster Bridge Road
London
SE1 7QY

Dear Joss,

Thank you for your letter of 15 April to Grant Shapps, about UK inbound Travel response to the Global Travel Taskforce. I am replying as the Minister for aviation.

From the Parliamentary
Under Secretary of State
Robert Courts MP

Great Minster House
33 Horseferry Road
London
SW1P 4DR

Tel: 0300 330 3000
E-Mail: robert.courts@dft.gov.uk

Web site: www.gov.uk/dft

Our Ref: MC/338946

5 May 2021



Prime Minister Boris Johnson said:

“ Thanks to the phenomenal success of our booster campaign and the extraordinary efforts of the public, the UK is officially one of the most open countries in Europe and ready to welcome visitors from across the globe.

“ The UK is home to thousands of world class attractions, unbeatable hospitality and incredible history and culture. 2022 also promises a host of unmissable events – from Her Majesty’s Jubilee to the Commonwealth Games.

“ Now is a fantastic time to book a trip and enjoy the best the UK has to offer.”

MEDIA ACHIEVEMENTS



TRAVEL WEEKLY

US and UK urged to reopen 'vital' transatlantic market

FINANCIAL TIMES

England to drop all 11 countries from coronavirus travel red list



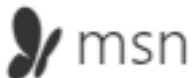
556 pieces of press coverage
75 national newspapers hits
48 television and radio interviews



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

The Telegraph

Testing costs 'significant barrier' to £550m a week inbound tourism



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

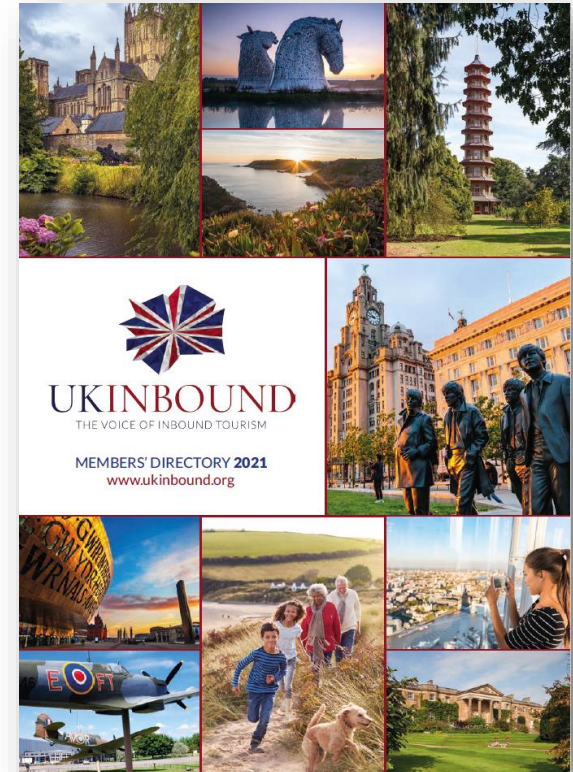
UKinbound awarded silver sustainability status

ConferenceNews



MARKETING

- ✓ Grown our digital audience by 20%
- ✓ Helped 128 businesses market to the travel trade & beyond
- ✓ Published the Year in Review, WTM Magazine
- ✓ Members Directory & UKinbound Map coming soon



OUR PRIORITIES FOR 2022

- ✓ Recovery
- ✓ Seat at the table
- ✓ Industry collaboration
- ✓ Voice of tourism





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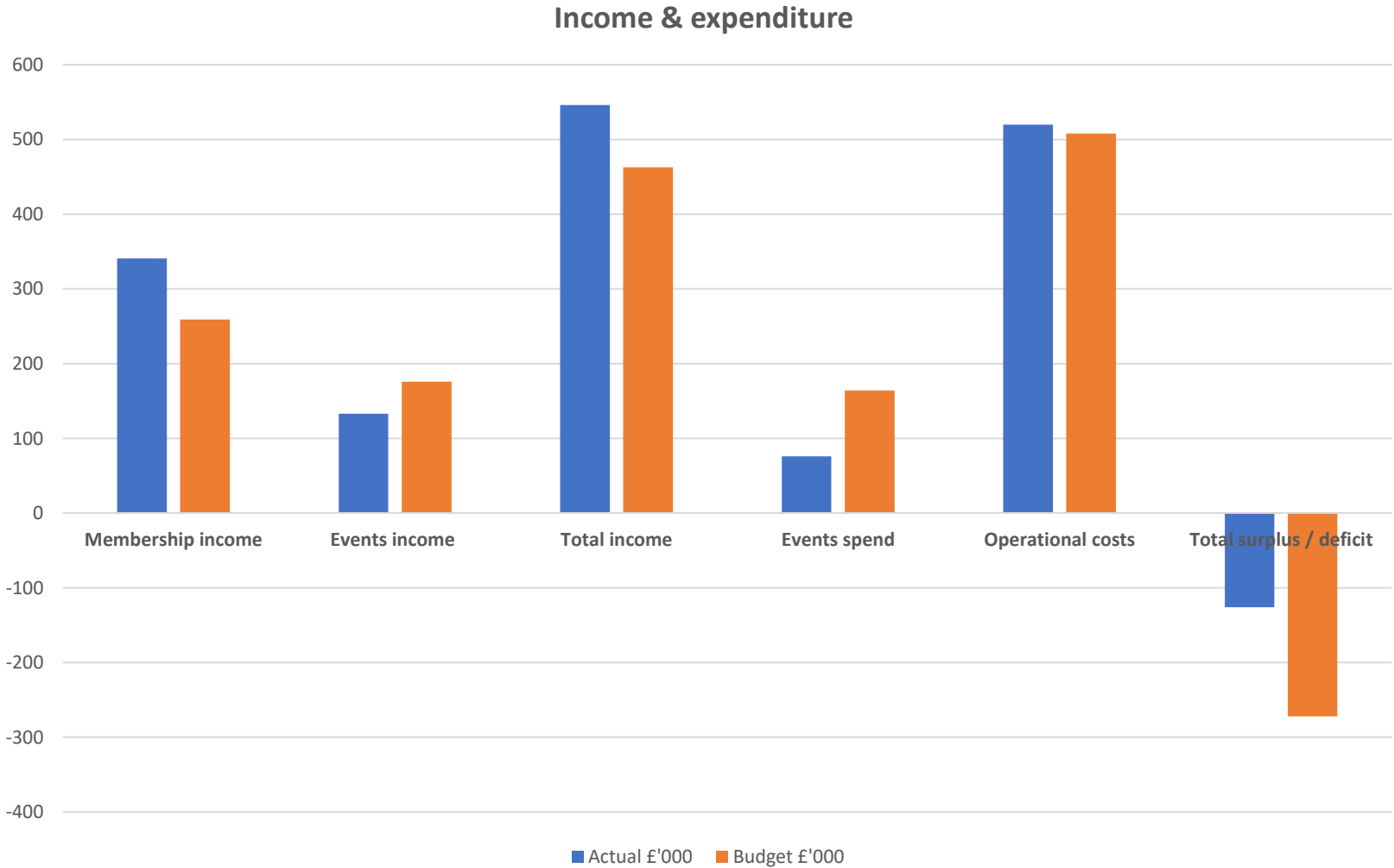
TREASURER'S REPORT

Lana Bennett
Treasurer

AUDIT

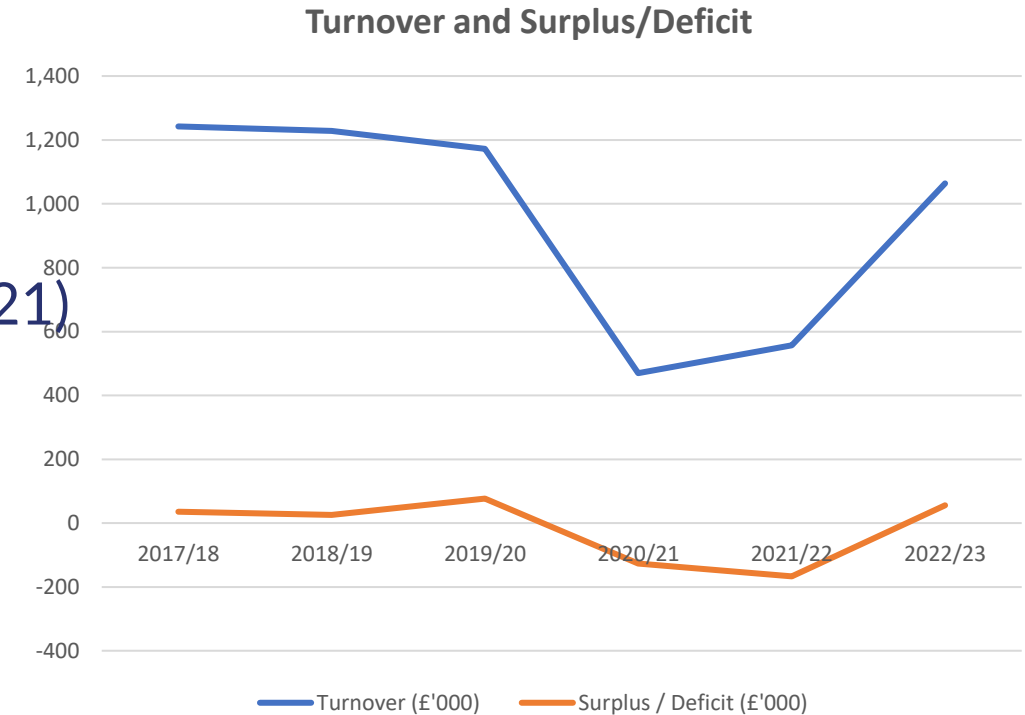
- ✓ No qualifications
- ✓ Audit prepared in accordance with applicable legal requirements
- ✓ Came in under budget
- ✓ UKinbound is a going concern

FINANCE UPDATE FY 2020/2021 (end September 2021)



FINANCE UPDATE FY 2020/2021 (end September 2021)

- Organisation impacted through the pandemic
- Lack of face-to-face events led to reduced turnover
(no in person WTM 2020 or ATM 2020 & 2021)
- Decrease in members:
 - 24% in 2020/21
 - 5% in 2021/22
- Took advantage of CBILS loans (£200K)
- Took advantage of bank transfer dividend (£25k)



TOP FINANCIAL RISKS

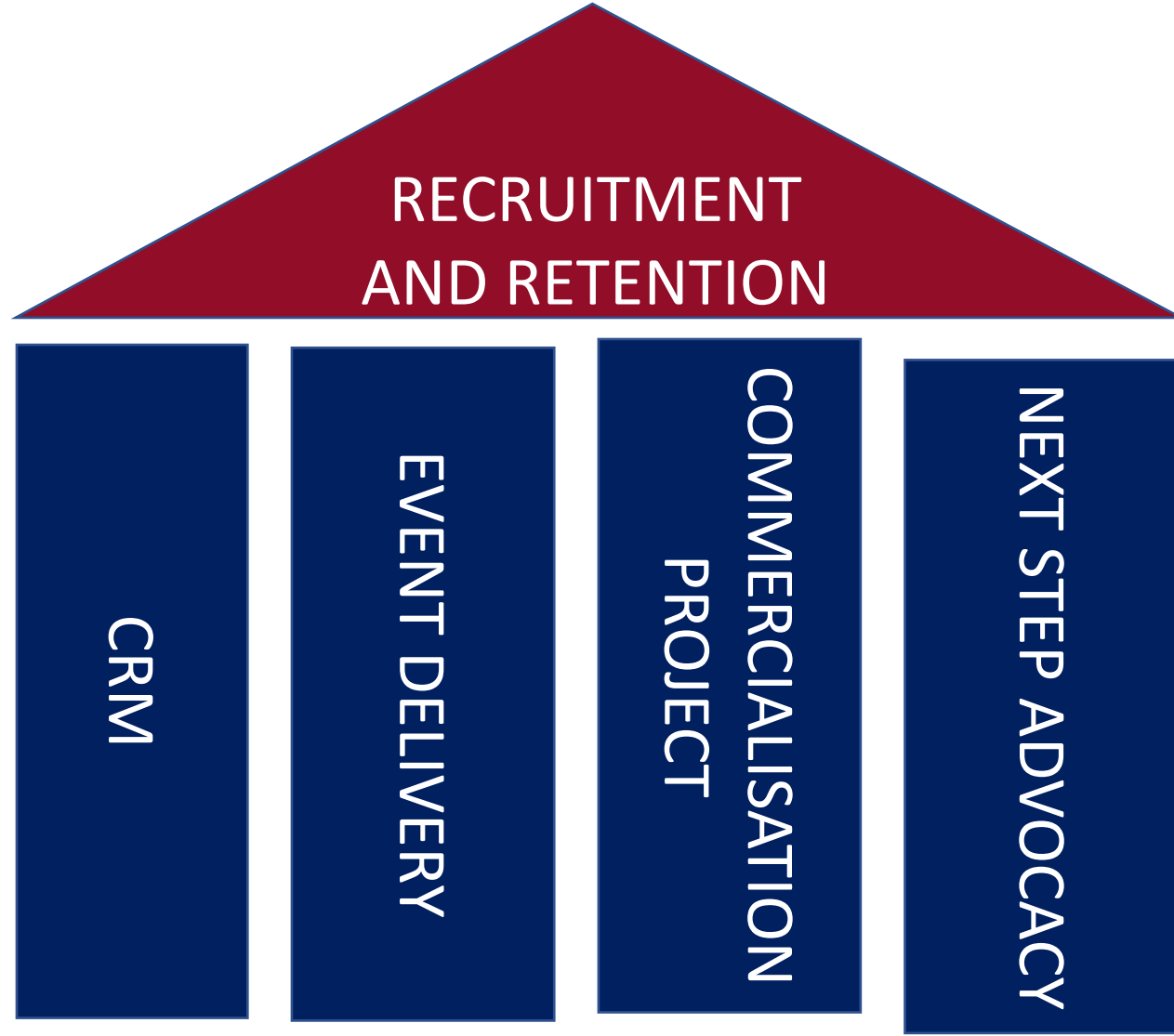
- New variant
- Government restrictions
- Source market challenges
- Weak cash flows of members



MITIGATIONS

- Monthly reforecasting after Q1
- Monthly cashflow
- Management accounts within a week of month end
- Overheads fixed
- Income in advance – membership & events

STRATEGIC PRIORITIES





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CEO UPDATE

Joss Croft
Chief Executive

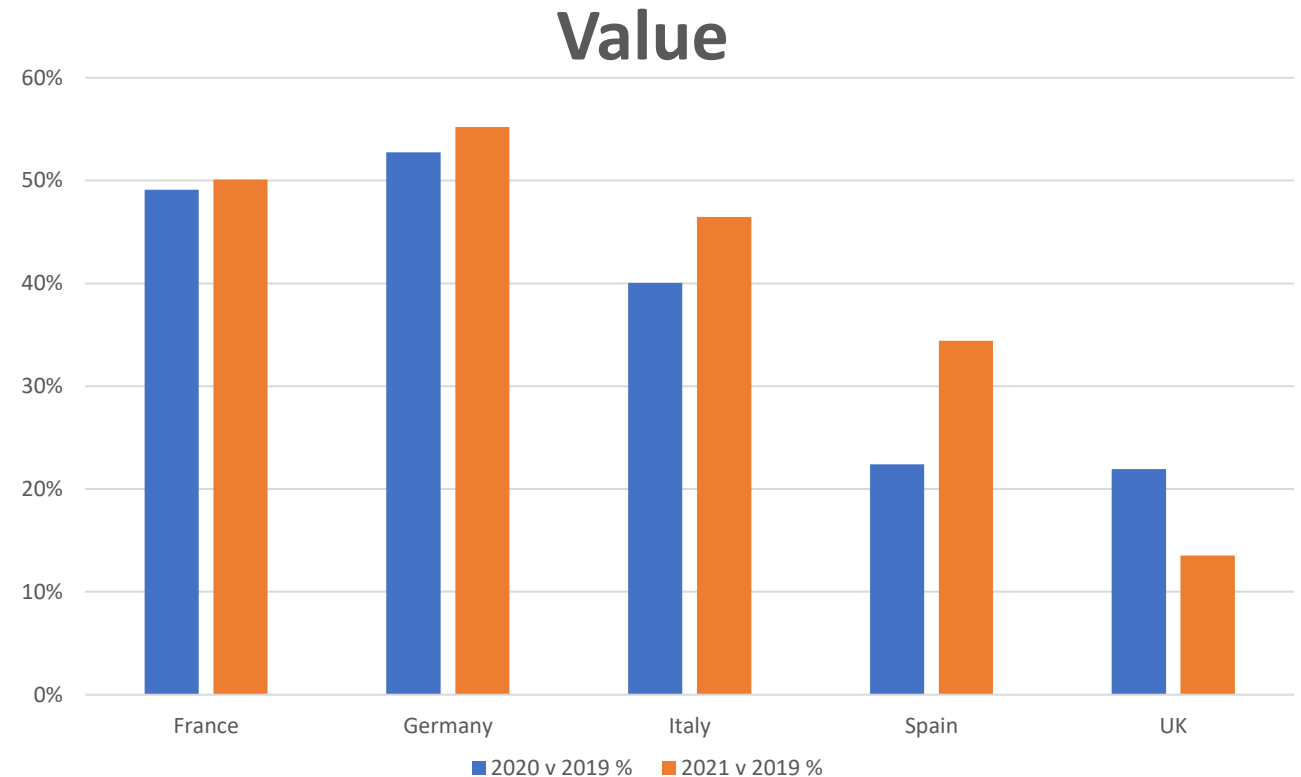
Q6. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues/ customer orders?

July 2016 – January 2022



RECOVERY RATES

- UK recovery in 2021 was weak compared with competitors
- UK loses vaccine dividend
- Ineffective restrictions put into place
- Bias in favour of outbound (e.g. day 2 v pre-departure)
- Many UK businesses unsupported (excl furlough)



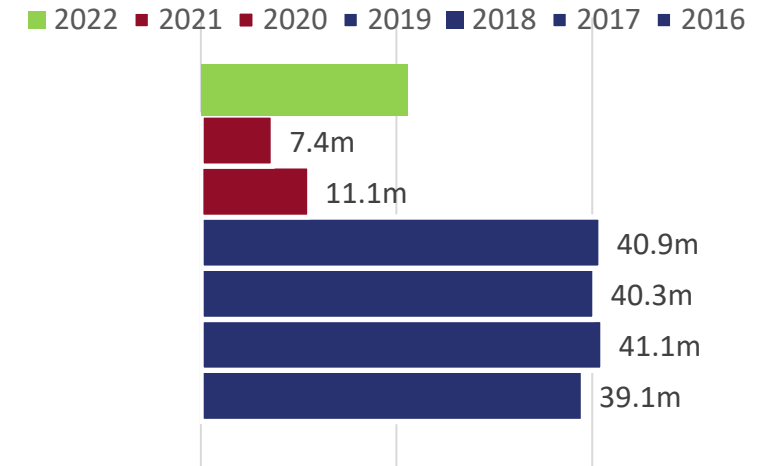
LOOKING FORWARD



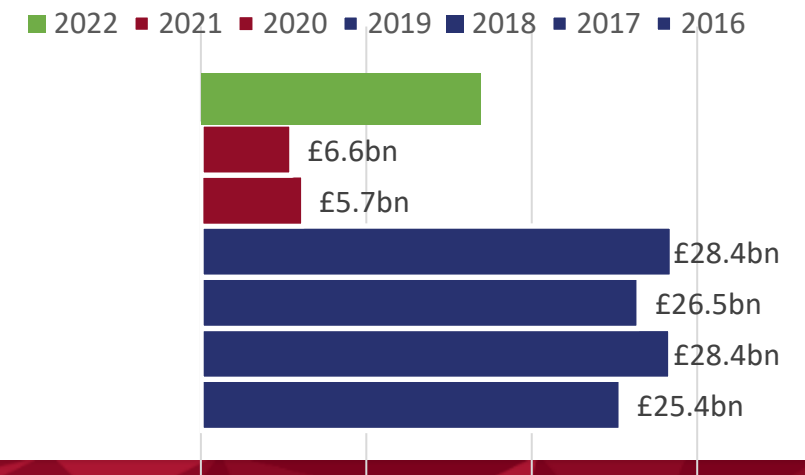
VISITBRITAIN INBOUND FORECAST 2022

- 21.1 million international visitors – 52% of 2019 levels
- £16.9 billion spend – 59% of 2019 levels
- Visit numbers fell sharply in January
- Gradual pickup in inbound volume and value throughout the rest of 2022.
- By summer we forecast return of c. half of pre-COVID inbound visitor volume
- By the end of 2022 we are forecasting visits to have recovered to around two thirds of pre-COVID levels.
- Visits from Europe and from long haul markets are forecast to recover at similar paces, relative to 2019, for most of the year
- We expect spend per visit to remain higher than the pre-pandemic norm, due to longer average length of stay as well as inflation.
- Assume that no new variant will significantly disrupt travel behaviours or trigger a re-tightening of borders and restrictions.

Overseas Visits (m)

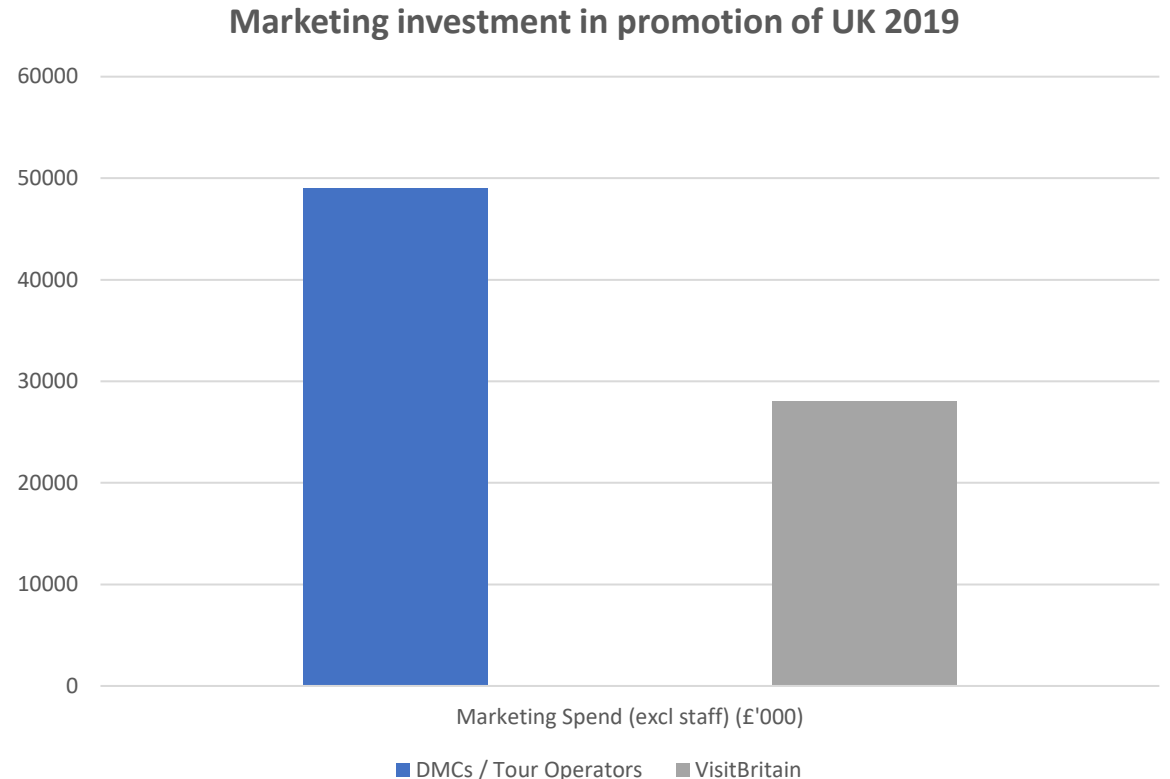


Overseas Visitor Spend (£bn)



MARKETING SPEND

- DMCs don't just convert the interest in the UK
- They actively promote the UK at the expense of our competitors
- The annual spend dwarfs that spent by public bodies
- Spending £49m in 2019 against a £28m spend by VB (£98m with staff costs)
- Risk that this can't / won't be spent in 2022 to secure 2022 and 2023 pipeline



CHALLENGES

Demand side

- Britain image
- Consumer confidence
- In-market travel restrictions
- Costs of visas / access to visas
- Removal of Tax free shopping
- ID cards
- VAT increases

Supply side

- Depleted reserves – access to credit
- Access to staff
- Access to skills
- Capacity constraints
- Supplier Ts and Cs

BRITAIN'S IMAGE – NBI 2021

- **Tourism** dropped two ranks to a record low of 6th in 2021. Within the tourism dimension, historic buildings maintained its rank of 5th but a place to visit if money was no object and vibrant city life dropped two ranks each.
- **Natural Beauty** remained a key weakness for the UK, reaching a record low of 31st.
- **Culture** fell one rank to 4th. Contemporary culture and sports both took 4th with some of the highest UK ranks of 2021. Rich cultural heritage dropped to 8th place, a record low.
- **People** saw a substantial drop to a record low of 10th. After a strong 2020, Welcome dropped 7 ranks to 18th in 2021.

CHALLENGES

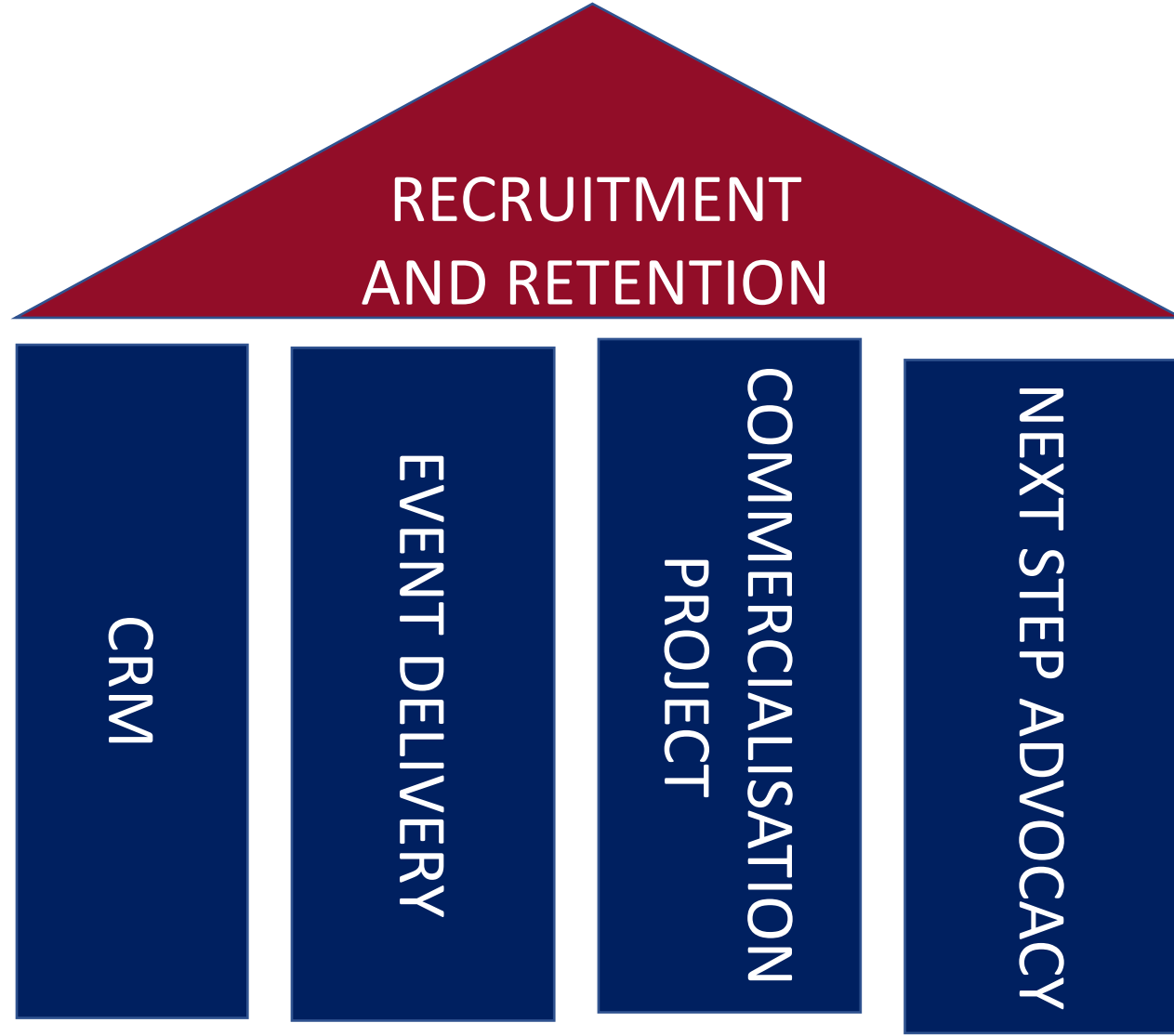
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STRATEGIC PRIORITIES



SUPPORTING YOU - EVENTS



Membership masterclass

Spotlight on - US new consumer – 08 March



Fam Trips – Discovers (Windsor – 13/14 March)

Networking evenings Harry Potter Photographic Exhibition (10 March), View from the Shard and VisitAberdeenshire (30 March), Liverpool



Arabian Travel Market – Dubai, WTC 09-12 May

Summer party – Tobacco Wharf, 29 June

UKiCon 22 – Aberdeen, 27-29 September



World Travel Market – London, 07-09 November

COMMERCIALISATION PROJECT

- De-risk the association in the longer term
- Comparator organisations diversified income
- Adding value to membership
 - Events platform
 - Event delivery
 - Training opportunities
 - Affiliate schemes

NEXT STEP ADVOCACY

✓ Trusted by government and politicians

- Tourism Industry Council
- Select Committees
- APPGs
- Build on MP relationships

✓ Go to for media

- Create the news
- Trusted source
- Build on media relationships

Key Issues

- Visas
- International Marketing
- Reinstitution of VAT Reclaim scheme
- Route development
- ID Cards
- Smooth borders
- Labour and skills
- Support for businesses
 - Grants, Business Rates, VAT

WE WILL CONTINUE TO...

- Focus on retaining our valuable members and growing our numbers
- Provide commercial opportunities
- Provide advice and guidance on all relevant issues
- Keep our events programme fresh and relevant
- Continue to work with you to understand your needs
- Continue to leverage skills and networks of the board and team
- Grow our reach and influence



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JULIA SIMPSON

**WORLD TRAVEL & TOURISM
COUNCIL**





QUESTIONS



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**Thank you for your
continued support!**