



**UKINBOUND**  
THE VOICE OF INBOUND TOURISM

# **AUTUMN GENERAL MEETING**

**5 September 2022**

**Novotel London West**

# WELCOME

**James Aitken**  
Chairman

# AGENDA

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1. Minutes Review – Chris Ball, General Secretary
2. CEO Update – Joss Croft, CEO
3. Guest Speaker - Laura Citron, CEO, London & Partners
4. Q&A
5. Any Other Business

# REVIEW OF MINUTES

**Chris Ball**  
General Secretary

# CEO UPDATE

**Joss Croft**  
Chief Executive

# WHAT HAVE WE BEEN UP TO? **MEMBERSHIP**

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**continuum**  
attractions

THE  
LAKESIDE & HAVERTHWAITE  
RAILWAY



**go sport**  
travel

EXPERIENCE  
PEAK DISTRICT  
& DERBYSHIRE



THE  
**DILLY**  
PICCADILLY

**raileasy**

**RHG RADISSON**  
HOTEL GROUP



MURRAYSHALL

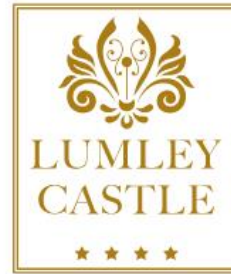
 **Heathrow**  
Express

**wis welcome**  
incoming services

CLASSIC  LODGES®

 **Cairn**  
Group

  
**attraction**  
world.com



  
Wilderness Group



**daysout.com**

**myhotelbreak.com**  
by classic britain

**Greatlittlebreaks®**



**AYRSHIRE & ARRAN**  
DESTINATION ALLIANCE

**SCHLOSS**  
ROXBURGHE

# WHAT HAVE WE BEEN UP TO? **MEMBERSHIP**

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



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

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- ID Cards Paper
- MP engagement
- Tourism Minister round table
- Home Office
- APPG Future of Aviation



# WHAT HAVE WE BEEN UP TO? MEDIA

## FINANCIAL TIMES

Travel & leisure industry

+ Add to myFT

### US tourists drive rebound in foreign visitors to London's top attractions

INDEPENDENT

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NEWS INDEPENDENT TV CLIMATE SPORT VOICES CULTURE TRAVEL INDY/LIFE PREMIUM INDYBEST INDY100 VOUCHERS COMPARE

Travel > News & Advice

### Brexit ID card rule 'catastrophic' for student travel to UK

Exclusive: EU school groups are opting to travel to Ireland instead, says UK tourism association

Simon Calder Travel Correspondent • Monday 27 June 2022 15:46 • 22 Comments



### New Data from UKinbound Reveals UK Summer Travel Trends

July 29, 2022 News, Tourism, Travel



Manchester Airport passengers are met with monstrous queues for another day (Image: ZENPIX LTD)

NEWS POLITICS FOOTBALL CELEBS TV MONEY ROYALS

### Hellish queues at UK airports as EasyJet, Wizz Air and BA cancel 166 flights

BREAKING travel news

HOME NEWS FOCUS EVENTS VIDEOS PHOTOS PUBLICATIONS

HOME » TRAVEL NEWS » TRAVEL EVENTS NEWS / ORGANISATIONS & OPERATORS

### Amar Latif named as UKinbound keynote speaker

© 8 June 2022

## TRAVELWEEKLY

NEWS IN DEPTH DESTINATIONS MEDIA COMPETITIONS ABOUT US EVENTS JOBS

< News

### Comment: Associations have a crucial role to play in business recovery

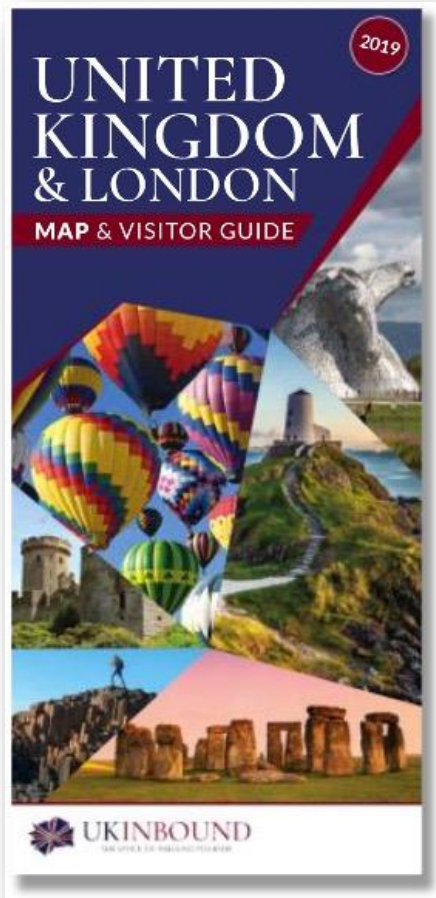


By Ian Taylor | August 12, 2022, 08:08



The incoming government needs to understand tourism's benefits, argues UKinbound chief Joss Croft

# WHAT HAVE WE BEEN UP TO? MARCOMMS



# WHAT HAVE WE BEEN UP TO?

## ABOUT UKINBOUND



We are the only trade association dedicated to the interests of the UK's inbound tourism sector. We help our members manage and grow their businesses as part of a vibrant and sustainable industry, and lobby Government to remove barriers to growth.

With a community of more than 1,200 travel trade professionals and 300+ members from across the entire industry, joining UKinbound allows you to actively engage and connect with the UK's top tourism businesses, from the moment you join.

“  
Being a member of UKinbound means being part of the inbound tourism community. Relationship building opportunities between buyers and suppliers is at the heart of what they do; as a result, it ensures that collectively we can offer visitors the very best of the UK. Our membership has also been invaluable throughout the pandemic - the industry updates and lobbying that UKinbound has carried out has been second to none, and the notion that the association has our back has been a great comfort.”

The screenshot shows the UKinbound September 2022 Members Newsletter. At the top left is the UKinbound logo with the tagline 'THE VOICE OF INBOUND TOURISM'. Below it, the date 'September 2022' is displayed. The main headline reads 'MEMBERS NEWSLETTER'. To the right, there is a promotional banner for the 'UKinbound Annual Convention 2022' at the 'Majestic Aberdeenshire', with the text 'Bookings close today!'. Below the newsletter header, there are three featured articles, each with a photo and a 'Read more >>' button:

- Robin Tyson** appointed Mountain Goat Tours MD (with photo of Robin Tyson)
- Shakespeare's England welcomes new BDM (with photo of a woman)
- Applications open for London Blue Badge Guide course (with logo for the Guild of Tourist Guides)

At the bottom of the newsletter, there are three more featured items:

- Tiqets** annual Remarkable Venue (with Tiqets logo)
- Love London: next phase of Let's Do (with photo of a London street scene)
- Lights, Camera, Action film tourism (with photo of a film set)

# WHAT'S NEXT?

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- Annual Convention, 28 – 29  
September
- World Travel Market, 7 – 9 November
- New Prime Minister
- Autumn Budget
- Business Barometer





**QUESTIONS**

# UKinbound GENERAL MEETING

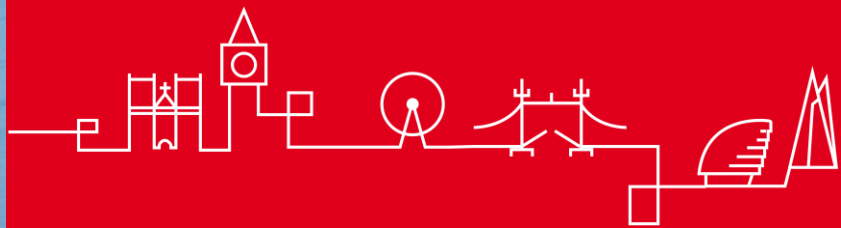
5 September 2022

**LONDON**  
& PARTNERS





# ABOUT LONDON & PARTNERS



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# WHO WE ARE

**London & Partners** is the business growth and destination agency for London.

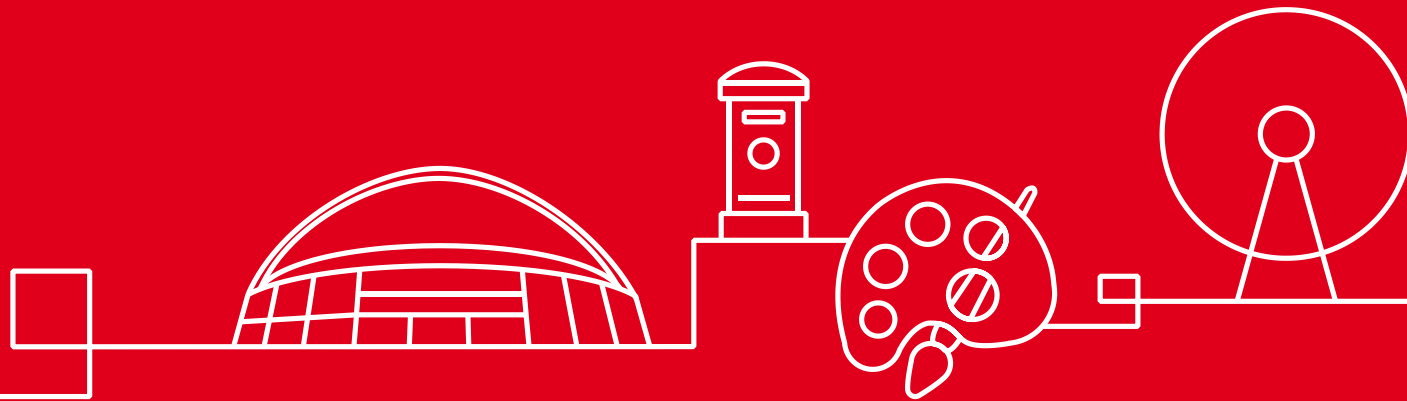
We are a social enterprise, combining purpose with commercial rigour.

We are funded by grants, partners and our portfolio of venture businesses.



# MISSION

**London & Partners** mission is to create economic growth that is resilient, sustainable and inclusive.



# WHAT WE DO

We create economic growth for London that is resilient, sustainable and inclusive.



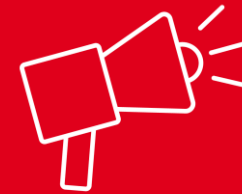
## Business Growth

Supporting high-growth international and domestic businesses to scale



## Destination

Developing London as a destination and attract visitors and events



## Brand London

Growing London's global reputation



## Partnerships & Ventures

Creating partnerships and profit-making ventures to scale our impact

# UK TOURISM

Where we are today



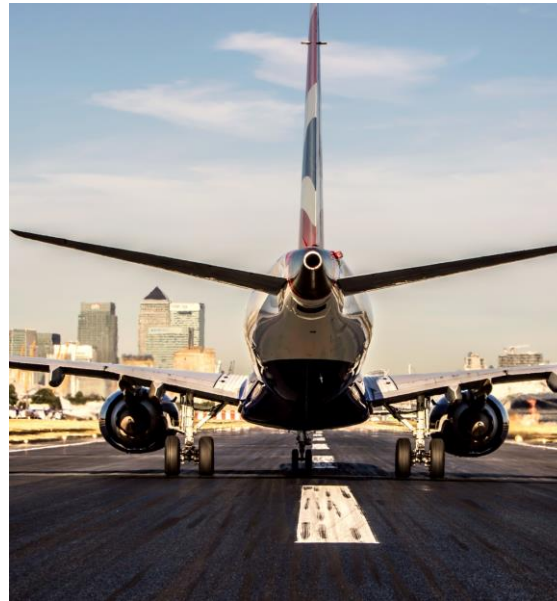
# UK flight cancellations seem to be plateauing

The proportion of flights being cancelled halved through the course of July, according to aviation data provider OAG. Early August data shows cancellations following a similar trajectory.

By the end of July, London Heathrow reported a 0.34% cancellation rate compared to 2.17% the week before, while London Gatwick was at 0.12% for the last seven days.



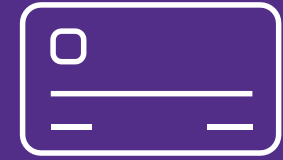
**0.34% of flights cancelled in the UK in the first week of August, compared to 5% in June**



# Inbound travellers show caution when booking flights to London

The latest ForwardKeys data shows last minute bookings are dropping off, compared with 2019 levels.

For the week commencing 27 July bookings for summer arrivals to the UK were down by 44% compared with 2019. London Gatwick fared slightly better, at 39% below, and London Heathrow saw 42% less last-minute bookings than in 2019.



There has been an 11% point slow down of flight bookings to London in July

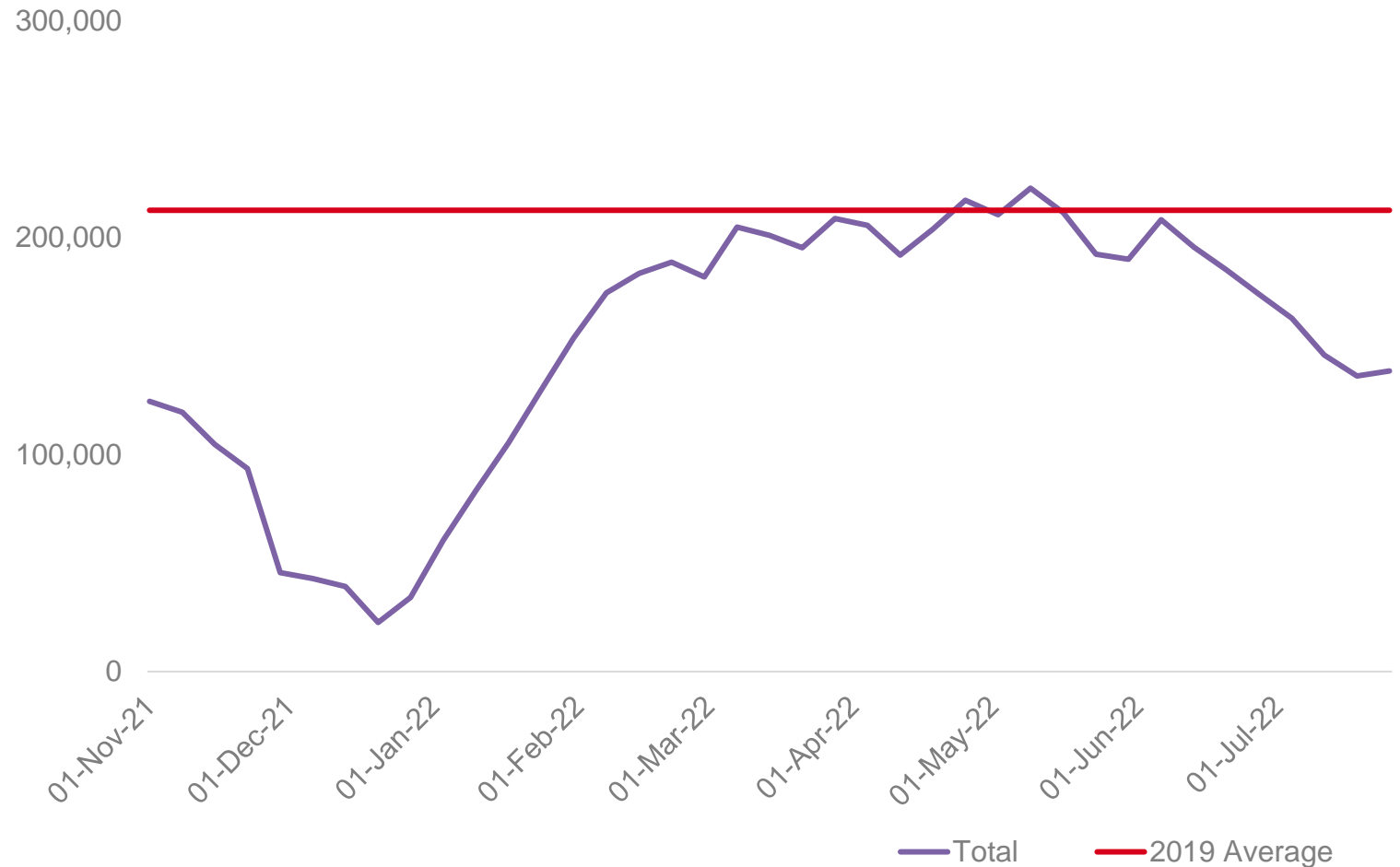


# Flight bookings total

The slowing of international bookings to London is evident in the weekly flight bookings data. The drop off has been starker in July with 45% fewer bookings than June alone.

70% of flights booked to London in July were for leisure purposes. With VFR and business travel at 11% and 10% respectively.

Total flight bookings to London, November 2021 – July 2022



This graph uses weekly flight booking data to London and is correct as of w/c 25<sup>th</sup> July 2022

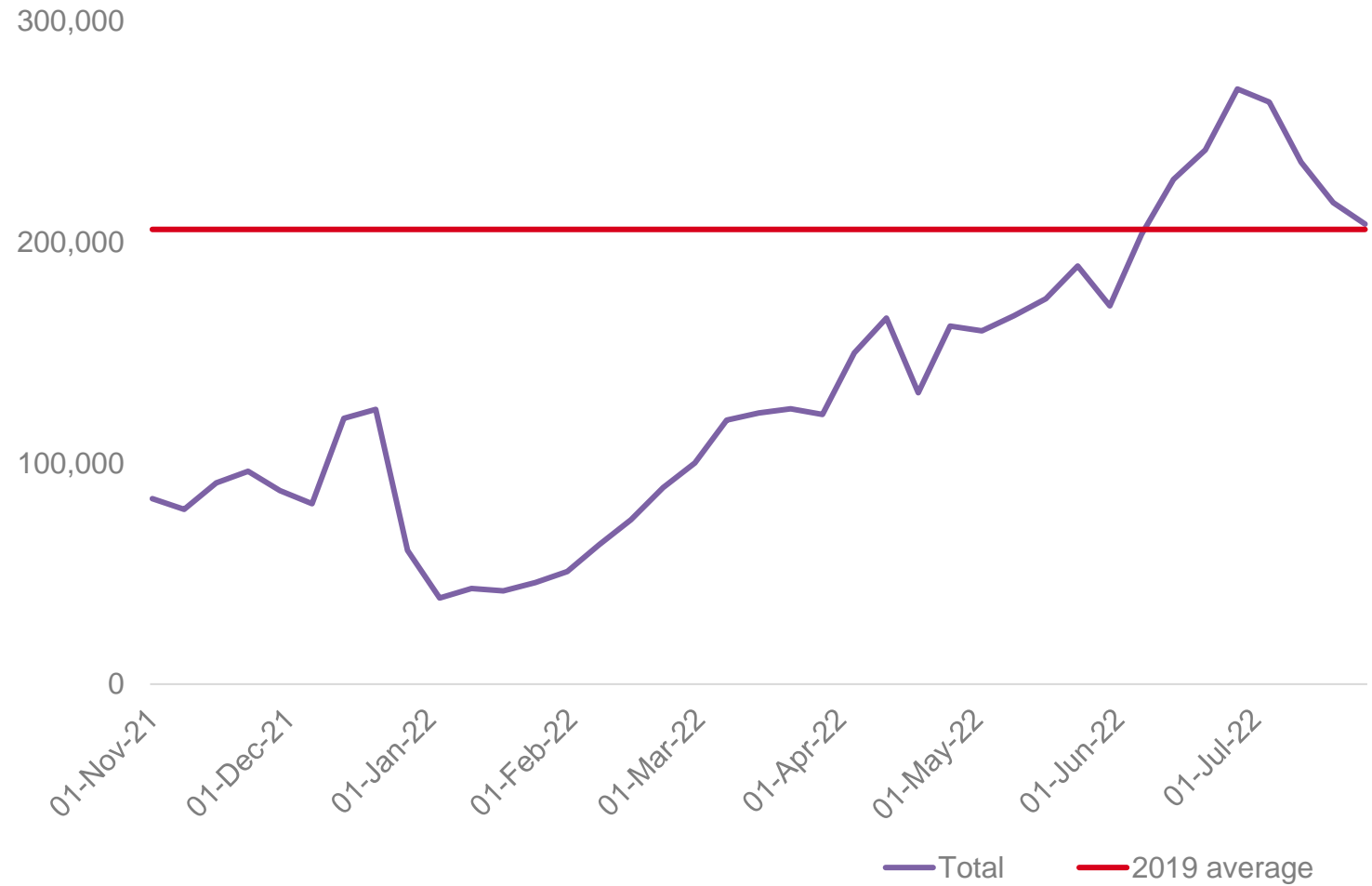


# Flight arrivals total

Whilst April's peak in arrivals were the result of increased visitors from Europe, the end of June peak came from North American travellers.

Arrivals have tailed off in July somewhat, owing to an earlier slowdown of international bookings to London.

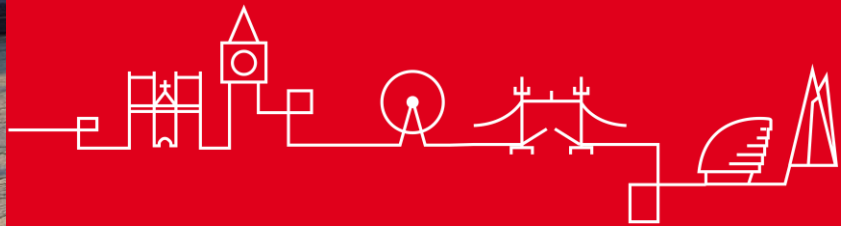
Total flight arrivals to London, November 2021 – July 2022



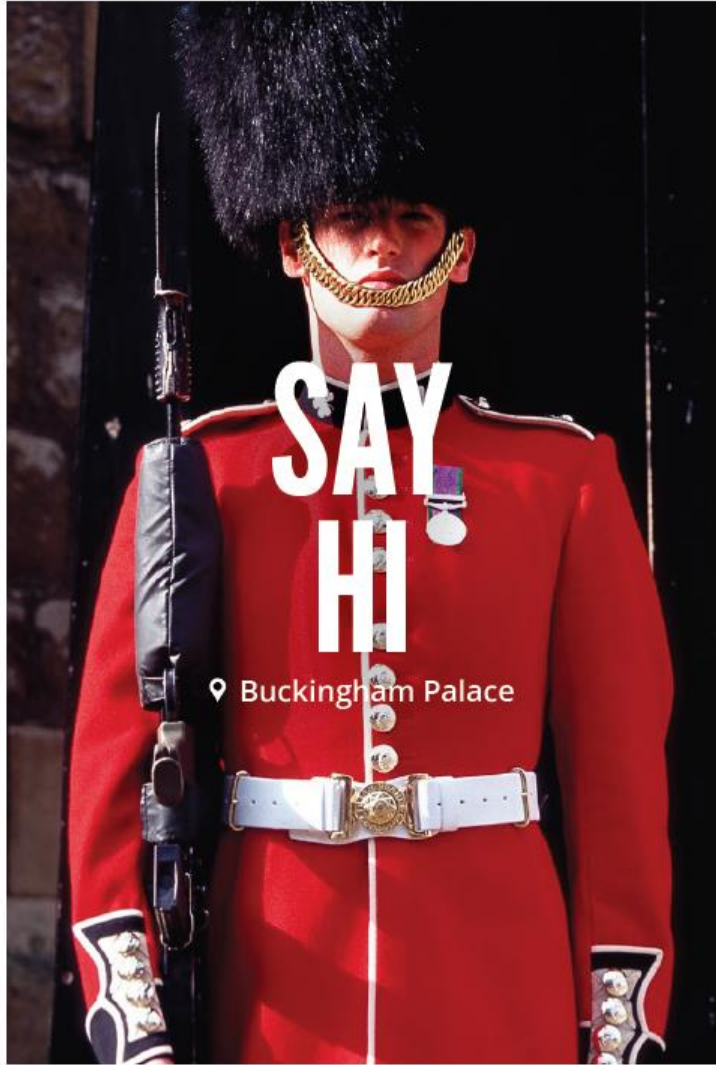
*This graph uses weekly flight arrival data to London and is correct as of w/c 25<sup>th</sup> July 2022*

# LET'S DO LONDON CAMPAIGN

International Marketing



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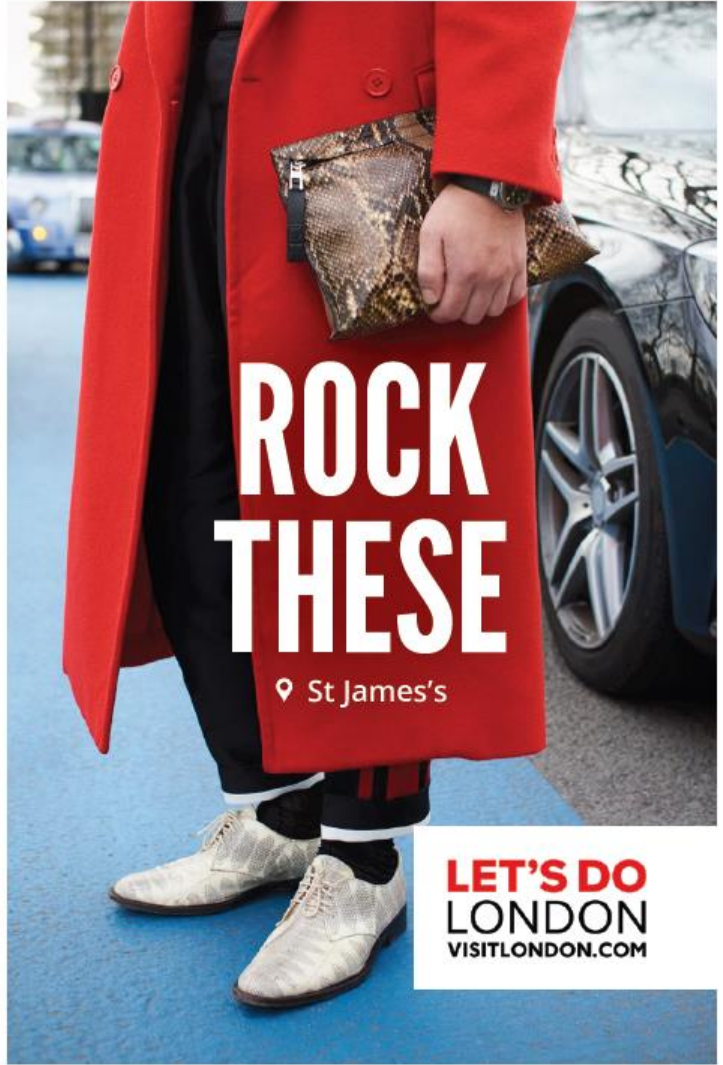
SAY  
HI

📍 Buckingham Palace



POSE  
HERE

📍 Everywhere



ROCK  
THESE

📍 St James's

LET'S DO  
LONDON  
VISITLONDON.COM



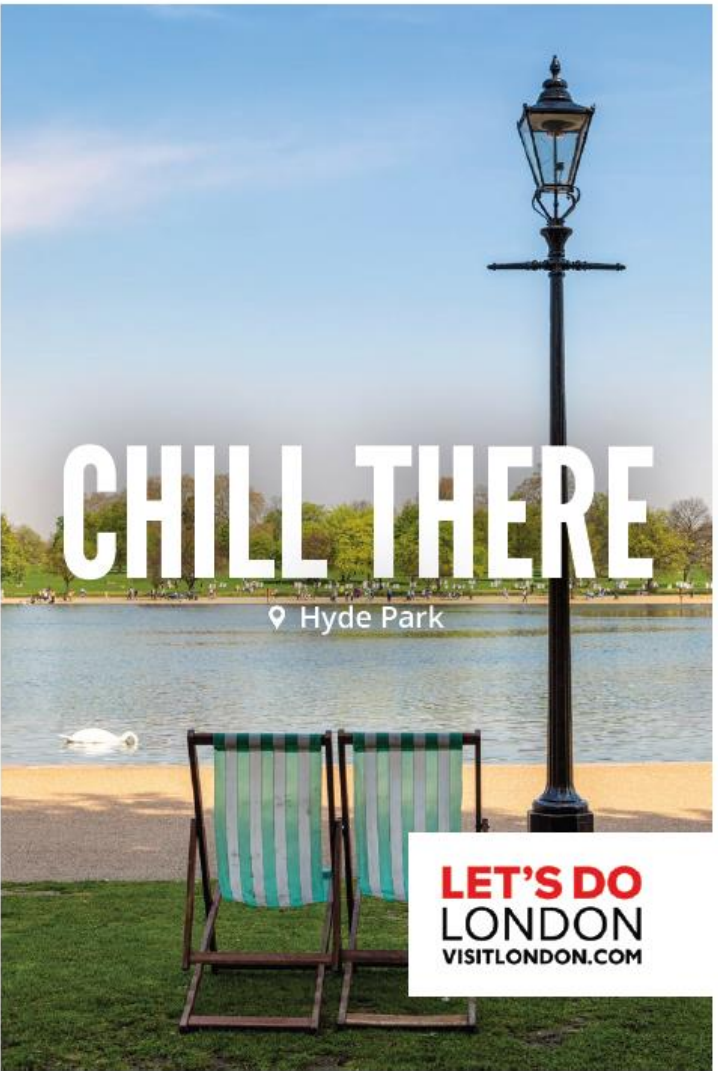
**SHOP HERE**

📍 Covent Garden



**INSTA THIS**

📍 Big Ben

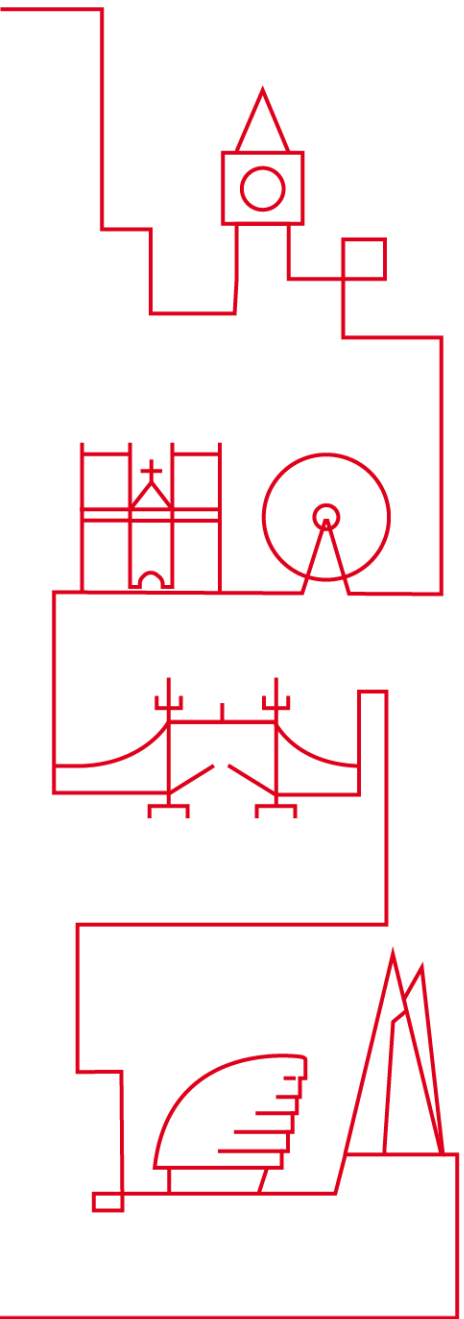


**CHILL THERE**

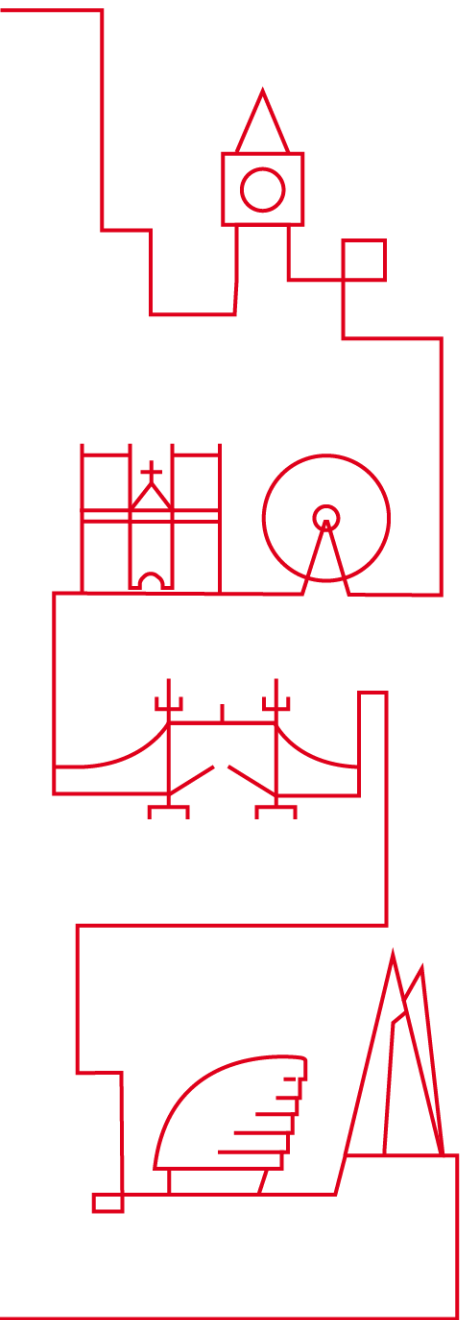
📍 Hyde Park

**LET'S DO  
LONDON**  
VISITLONDON.COM

## The campaign video



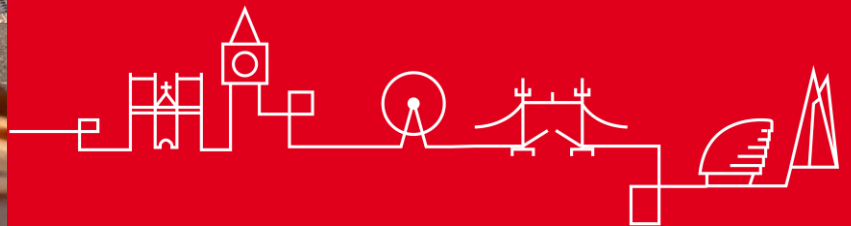
## A genuine surprise in LA





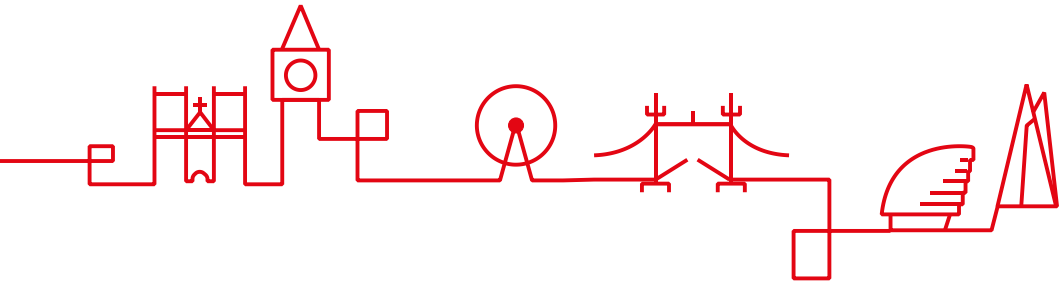
# A TOURISM VISION

Shaping the future together



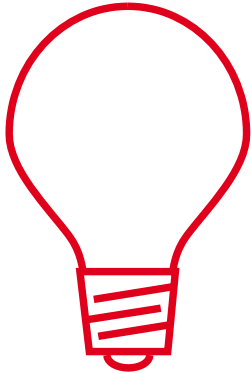
# A 'Vision' for London

- A **Vision** and not a strategy
- A **call to action**
- An **invitation** to write London's next chapter together
- A **framework** to base strategies on





# A robust process



## Clear ambition

- **Future-proof the industry** and look to the future
- Create a **common framework** for strategy to be based on
- Use the Vision as a **bridge** to take us from 2019 to where we want to be in 2030



## Data and insight led

- Framework of **resilience, inclusion and sustainability.**
- Research trends **across growth markets, jobs & skills, carbon efficiency**
- Series of **industry roundtables**, followed by a **written consultation**



## A collaborative approach

- Building on the **collaboration** through the pandemic.
- Delighted with the **number of organisations** that have taken part
- Worked closely with the **Mayor's office and policy leads at the GLA**

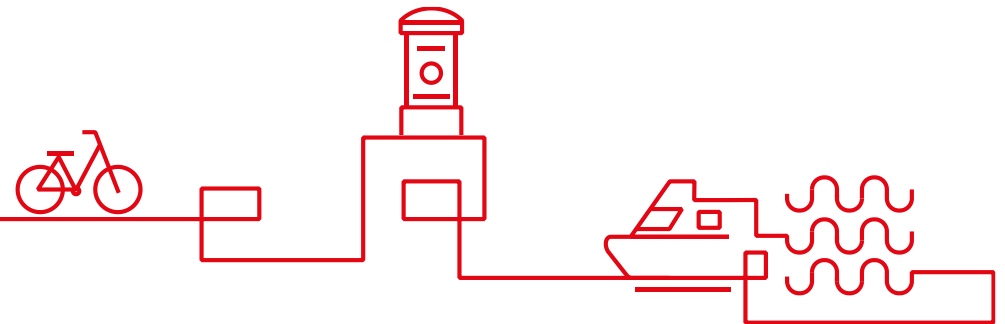


# A sneak peak

A clear consensus has emerged over a ‘north star’ – **we will make the tourism experience the best it can be – for visitors and for Londoners.**

The Vision will lay out **how we can achieve that together** by creating a framework based on destination management, our role on society, leading on sustainability and thereby redefining success.

Our launch and publication will be in October.



**LONDON**  
& PARTNERS

**THANK YOU**





**QUESTIONS**



**ANY OTHER BUSINESS**