



UKINBOUND AUTUMN GENERAL MEETING - MINUTES

5 September 2022

Novotel London West

1. WELCOME

- 1.1 James Aitken (JA), Chairman of UKinbound, welcomed all attendees to the Autumn General Meeting. JA thanked the team at Novotel London West and Accor for hosting the meeting and networking evening.
- 1.2 JA gave an update on industry figures, noting the new forecast from VisitBritain suggesting inbound arrivals and spend will reach 65% and 76% respectively of 2019 figures, more than previously predicted. However, this is against a 79% recovery to pre-Covid arrival figures in Western Europe, 86% in Caribbean countries, and 67% in North America. A significant proportion of UK inbound visits are coming from the US, driven by historic travel credits, and European visitors are continuing to return.

JA gave a look ahead at the coming months with the announcement of the new Prime Minister Liz Truss and anticipated announcement of the new Cabinet and Tourism Minister. UKinbound will continue to highlight the value of inbound tourism to the new Government, as well as the urgent need for policies to support business recovery and issues such as high energy bills, inflation and staffing, as well as ID cards, tax-free shopping and accessible visas. The Association has been asked to provide evidence to the House of Lords European Affairs Committee Inquiry into the UK-EU relationship, and members will be contacted in the coming weeks to provide feedback.

2. MINUTES OF PREVIOUS GENERAL MEETING - 16 May 2022

- 2.1 General Secretary Chris Ball reviewed the minutes of the previous meeting. Rob Way, The Tourism Media proposed that they were a true and accurate record of the previous meeting. The motion was seconded by Stacy Whittington, The QHotel Collection.
- 2.2 Daryl Bennett, Go City, proposed that there were no matters arising. The motion was seconded by Kathryn Davis, Visit West.

3. CEO UPDATE – JOSS CROFT

- 3.1 Joss Croft (JC) welcomed all attendees and presented an update on the industry and UKinbound's recent activities since the Annual General Meeting in February 2022.
- 3.2 MEMBERSHIP. Following a 28% fall in membership numbers during the pandemic, the Association has welcomed a record-breaking 82 new members during the current membership year, bringing the total to 341 members. JC noted that many of these are new brands for UKinbound and represent a strong regional spread. JC reminded members that the end of the 2021/22 membership year is coming to an end on 30 September 2022 and renewal invoices should have been received.
- 3.3 EVENTS. JC welcomed new Events Manager Palmira Errico and gave an update on events held since the Spring General Meeting, which included a virtual DMO update and fam trip with Visit Moray Speyside, a fam trip to Emirates Old Trafford with Sportsbreaks.com, a virtual DMO update and fam trip with Glasgow Life, and the summer networking evening at The Kia Oval.

Forthcoming events include: Networking evenings in Edinburgh in September and at the new Virgin Hotel Edinburgh in November, networking evenings in London at the Hard Rock Cafe in October and All Star Lanes in November, fam trip to Liverpool in October and to the Tottenham Hotspur Stadium in November.

- 3.4 ADVOCACY. JC reported that a new paper asking Government to implement a Youth Group Travel Scheme has been drafted and will be submitted to the Tourism Industry Council in the coming weeks. Parliamentary engagement has continued with meetings with the Shadow Tourism Minister Jeff Smith MP, and Sally-Ann Hart MP for Hastings and Rye.

JC attended a roundtable hosted by Tourism Minister Nigel Huddleston MP at the Commonwealth Games to share data about the recovery of member businesses and highlight continued barriers, as well as a Home Office workshop to discuss the UK rollout of ETA visas next year. JC also presented to the Future of Aviation APPG at their winter resilience session.

- 3.6 MEDIA ENGAGEMENT. Media engagement continues to be strong with quality pieces secured in national and broadcast media including BBC Radio 4, City AM, the Financial Times and The Independent. An opinion piece was produced for Travel Weekly to highlight the value of inbound tourism business.
- 3.7 MARKETING & COMMUNICATIONS. The Year In Review and UKinbound Map was published over the summer. JC reminded members of the Association's marketing services, including the free members newsletter which see average open rates of more than 35%. JC reminded members to follow UKinbound's social channels on Twitter, LinkedIn and Facebook.

- 3.8 **UPCOMING ACTIVITIES.** The UKinbound Annual Convention will take place on 28 & 29 September, with more than 260 delegates attending. JC reminded members that the B2B portal will be opening this week and to ensure meeting preferences are completed on time in order to generate the best possible meeting itineraries. The fancy dress competition theme will be 'Stories of Scotland' to complement VisitScotland's Year of Stories. The Convention will also see the return of the UKinbound Awards for Excellence Gala Dinner, with the awards shortlist announced earlier in the day.

World Travel Market will take place on 7- 9 November, with more than 50 exhibitors confirmed on the UKinbound stand.

A welcome letter has been sent to new Prime Minister Liz Truss, outlining the Association's activities and key asks. Once the new cabinet and minister appointments have been announced UKinbound will roll out a plan of engagement to ensure members' needs continue to be communicated to the highest levels of Government. The team are currently compiling a submission ahead of the Chancellor's Autumn Budget in October.

JC reminded members to complete the upcoming Business Barometer survey which helps to shape policy work, secure media coverage and inform Association activities.

- 3.9 JC thanked the team at Novotel London West and Accor, the members and Board for their continued support, and the UKinbound team for their hard work.

4. GUEST SPEAKER – LAURA CITRON, CEO, LONDON & PARTNERS

- 4.1 Laura Citron (LC) introduced London & Partners and the organisation's remit, including tourism and the visitor economy, alongside supporting London businesses and promoting the London brand. LC gave an overview of their latest industry insights which included:

- The summer season was good, but the recovery remains fragile with both supply and demand challenges. The impact of the global cost-of-living crisis on demand is still uncertain.
- China represents a significant missing link as the second-fastest growing market pre-Covid; it is expected they may return in late Autumn or after Chinese New Year in 2023.
- UK flight cancellations appear to be plateauing, however forward data shows inbound travellers are cautious when booking into London and last-minute bookings are in decline. LC noted two peaks in flight bookings were seen over the summer, with the first driven by European visitors and the second by North American visitors - a return to traditional seasonality.

- 4.2 LC introduced the Let's Do London campaign which aims to generate leisure demand. The first phase of the campaign targeted domestic visitors and drove £80m in spend and 300,000 extra visitors. The current phase of the campaign is live in the USA, France and Germany and is the biggest campaign of its kind run by London & Partners. Early indications are very positive, with those who have seen the campaign four times more likely to visit London.

LC noted that the Let's Do London campaign marked a change in industry collaboration through the London Tourism Recovery Board with a clear role defined for the industry as commissioners of the campaign and London & Partners accountable for successful delivery. LC thanked attendees for their support of the campaign and JC for representing the membership on the London Tourism Recovery Board.

LC gave an overview of London & Partner's new Tourism Vision, due to be launched in October, to which over 100 companies have contributed. The Tourism Vision is supported primarily by the Greater London Authority will be data-led, with Tourism Economics conducting analyses on the future growth of London, future key markets, the role of sustainability and inclusion.

6. Q&A

- 6.1 Philip Green, Elite International Travel commented: This time 12 years ago I was the Chairman of UKinbound, and when I left I thought we couldn't have had a worse period. We had 9/11, foot and mouth, two London bombings, and I thought nobody else will have this bad luck. I have to say a big thank you to James Aitken, Joss Croft and everybody at UKinbound because I know what it's like to have to deal with that type of pressure and experience, so well done to everyone for coming through. Well done also to everyone in the room as yet again, inbound tourism has shown its resilience and its ability to come back, work hard, and stay alive.

JC responded: Thank you Philip and I would also like to give you all a round of applause too. When it first started happening in early 2020 – a few people in this room really stood up, took the initiative and pulled the industry together. Someone once told me that success is hanging on when others let go, and you are all testament to that with the creativity, innovation and determination to get out there each day to promote your business and the industry. I also want to recognise my team and the sheer amount of hard work they've put in over the last couple of years.

- 6.2 JC asked LC: You say that people who have seen the Let's Do London campaign are four times more likely to visit the destination than those who haven't. Over the weekend, some of you will have seen Jacob Rees-Mogg questioning advertising for UK destinations on the basis that people are already going to come. What more do we need to convince political stakeholders that promoting the UK overseas works? And as an aside to that, we did a survey earlier this year which found that our tour operator members spend roughly £97m a year promoting the UK overseas. Taking out other costs that's still around £27m that our tour operators are spending – much more than London is able to, and much more than VisitBritain is able to. But what more do we need to help people understand that this is important?

LC responded: The data is clear that marketing makes a difference. We know this in the tourism sector, but more broadly you can look at any number of studies across a whole range of business sectors that show marketing is a driver of both revenue and value. The

fact that politicians don't want to support the industry is not an argument we're going to win on the basis of having more data – we have the data. It comes to the question of the value of the industry and the contribution that we make, and making the case for why tourism is such an important part of the fabric of society and therefore why its worth investing in. There's also something about trusting the experts, and helping politicians to have confidence that arms-length bodies will spend money wisely,

- 6.3 Mike Newman, b2me Tourism Marketing asked LC: Given that direct bookings via intermediaries such as tour operators and OTAs make up a valuable proportion of inbound visits from all of our core markets - what is Let's Do London doing on a B2B level for all those who want the reassurance of going through a tour operator or travel agent? The campaign is a very clear B2C message, and of course I am supportive of what you are doing, but I would really like to understand more about what London & Partners and VisitBritain are doing to support the trade. How do these massive campaigns direct visitors to book through a tour operator or travel agent?

LC responded: Where we are most useful is doing the marketing that can't be done by individual businesses, which is the very top-of-the-funnel, inspirational, destination work. It's about creating the desire to travel to London, getting people to consider it, and increasing the likelihood that London is top of their consideration list. Whether they then choose to book directly or through trade, or how we then convert that demand, is something that we can work in partnership on, and every business will then be picking on that demand that we've generated. You can act at that point once people are into the decision-making cycle, we're not in that space because we're not part of the customer booking journey. Where we are helpful is having a joined up 'come to London' message, then depending on their preferences, visitors can book in whichever way they want. Where we feel we can really add value is at that inspiration stage.

JC thanked LC and closed the meeting.

NEXT MEETING

The next meeting will be held on 5 December 2022.

There was no other business.

CLOSE OF MEETING.