



UKINBOUND
THE VOICE OF INBOUND TOURISM

ANNUAL GENERAL MEETING

6 February 2023

**SCIENCE
MUSEUM**



UKINBOUND
THE VOICE OF INBOUND TOURISM

WELCOME

Joss Croft
CEO



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WELCOME

James Aitken
Chairman



AGENDA

1. Welcome from our hosts – Pete Dickinson, Science Museum
2. Minutes Review – Chris Ball, General Secretary
3. Membership Update – Chris Ball
4. Events Update – Andrew Guthrie
5. Public Affairs & Communications Update – Joss Croft (for Jen Cormack)
6. Treasurer's Report – Lana Bennett, Treasurer
7. CEO Update – Joss Croft
8. Q&A
9. Richard Toomer - Tourism Alliance
10. Any Other Business

SCIENCE MUSEUM AND UKINBOUND

PETE DICKINSON
DIRECTOR OF COMMUNICATIONS

SCIENCE
MUSEUM

FREE GALLERIES



PERMANENT OFFER



BLOCKBUSTER EXHIBITIONS





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REVIEW OF MINUTES

Chris Ball
General Secretary



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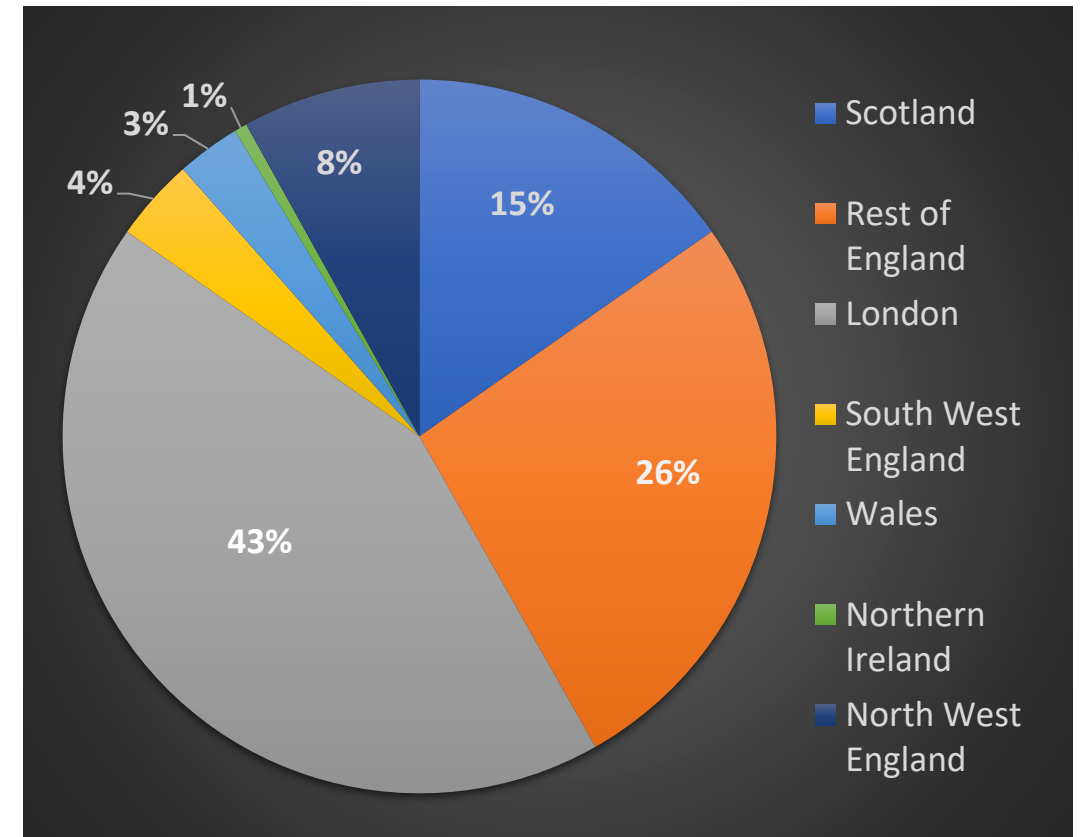
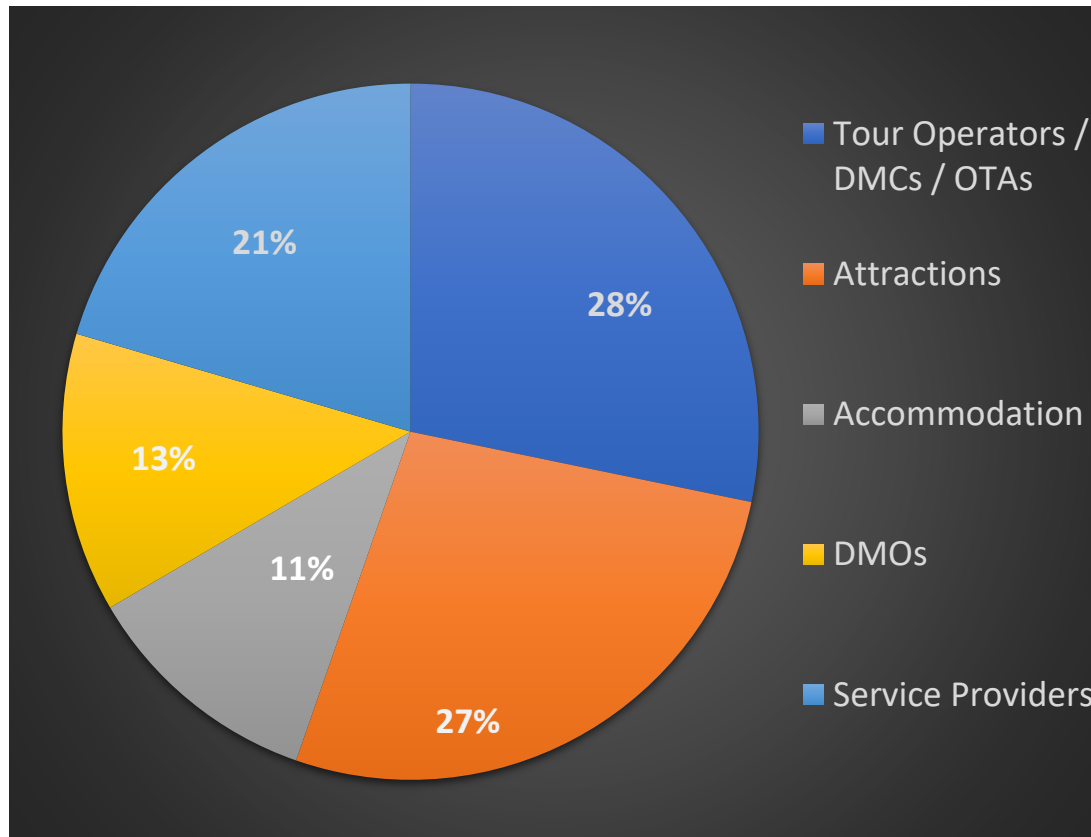
MEMBERSHIP UPDATE

Chris Ball
General Secretary

351

MEMBERSHIP OVERVIEW

351 Members





GRETNA GREEN
SINCE 1754



VisitYork
visityork.org



wordsworth
GRASMERE



DISCOVER
GLOBAL NETWORK



KNIGHTS BRIDGE
PARTNERSHIP



SPORTSHOTELS.COM

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 2021/22



OUR ACHIEVEMENTS

36 events in 2022! Including:

- 3 Webinars
- 5 Virtual Destination Updates & Fam Trips
- 1 Virtual CEO roundtable
- 5 General Meetings
- 9 Members' Networking Evenings
- 5 Fam Trips
- 2 Discover Workshops
- 1 Annual Convention in Aberdeen
- 1 Gala and awards dinner
- 1 Britain and Ireland Marketplace (BIM)
- 1 WTM Live
- 1 ATM
- 1 Virtual Membership Masterclass



OUR ACHIEVEMENTS

- ✓ In-person events returned!
- ✓ Successful Convention in Aberdeen bringing the industry back together with re-introduction of Awards for Excellence
- ✓ Busiest stand within the whole exhibition at WTM 2022
- ✓ 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 - 2023

- Ensure relevancy of events
- Events to aid recovery of the industry and Association
- Annual Convention in Belfast on 20 & 21 September 2023
- Maximising EventsAir
- Continue to increase sponsorship, and maintain important revenue streams for the Association
- Longer forward look
- Increase regional events
- Review international and domestic events





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PUBLIC AFFAIRS & COMMUNICATIONS UPDATE

Joss Croft – for Jennifer Cormack
Communications Committee Chair

ADVOCACY

- ✓ Removal of Omicron restrictions
- ✓ Maintaining a seat at the table:
 - Chair of the Tourism Industry Council's International Competitiveness & Demand Working Group
 - Joined the Scottish Government Tourism and Hospitality Industry Leadership Group
- ✓ Parliamentary engagement:
 - DCMS Select Committee
 - House of Lords Economic Affairs Committee
 - APPG for the Future of Aviation
- ✓ Industry collaboration
 - Joint report with ABTA on value of international travel to the UK economy
 - Future Travel Coalition

MEDIA

itv NEWS

**CHINA COVID RESTRICTIONS
TOURISM BOSSES CONCERNED**

TRAVEL WEEKLY

UKinbound calls for government U-turn on VAT-free shopping

THE TIMES

American tourists are coming back to Britain as the pound tumbles

BBC RADIO KENT

LBC

FINANCIAL TIMES

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

334 pieces of press coverage

28 national newspapers hits

5 television and radio interviews

METRO

BBC NEWS



THE IRISH NEWS

Belfast wins bid to host major travel convention in September 2023

THE CATERER

UKinbound: Government must help boost tourism in 'critical six months'

INDEPENDENT

Three years post-Brexit, how does the travel reality match up with what we were promised?

CLH
CATERER LICENSEE HOTELIER NEWS

New Data from UKinbound Reveals UK Summer Travel Trends

ttg MEDIA

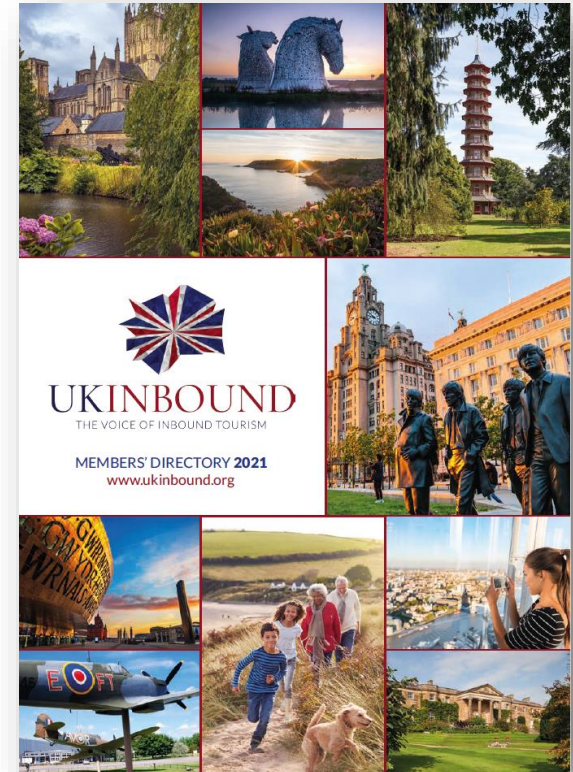
TRAVEL'S £80BN CONTRIBUTION TO UK ECONOMY LAID BARE IN NEW REPORT

ET THE ECONOMIC TIMES

Tourism comes to rescue UK losses as Queen Elizabeth mourners flock London hotels

MARKETING

- ✓ Grown our digital audience by 15%
- ✓ Helped 130+ businesses market to the travel trade & beyond
- ✓ Published the Members Directory, Year in Review, UKinbound Map & WTM Magazine
- ✓ Members Directory 2023 coming soon



OUR PRIORITIES FOR 2023

- ✓ Supporting your recovery
- ✓ Seat at the table
- ✓ Industry collaboration
- ✓ Parliamentary engagement





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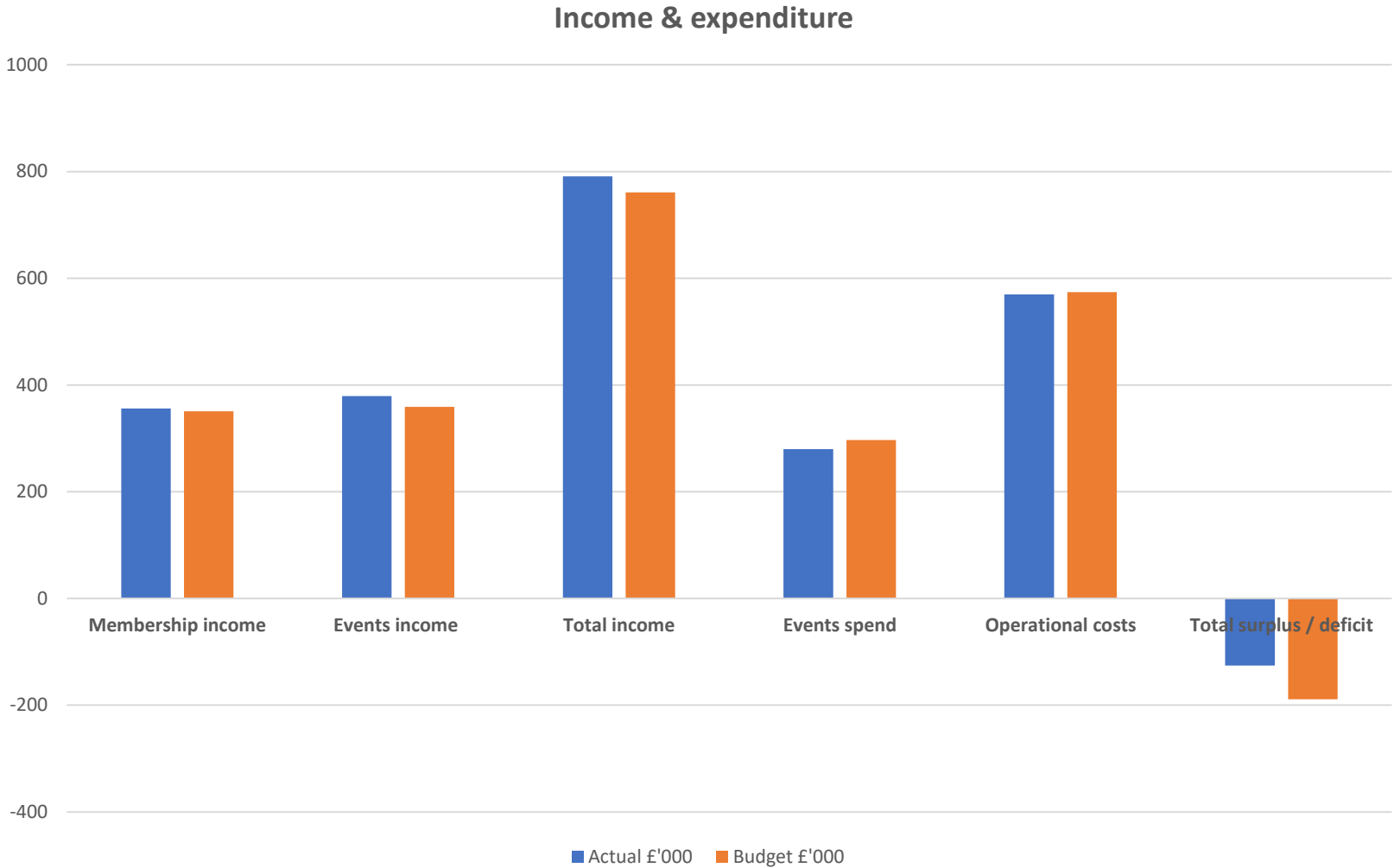
TREASURER'S REPORT

Lana Bennett
Treasurer

AUDIT

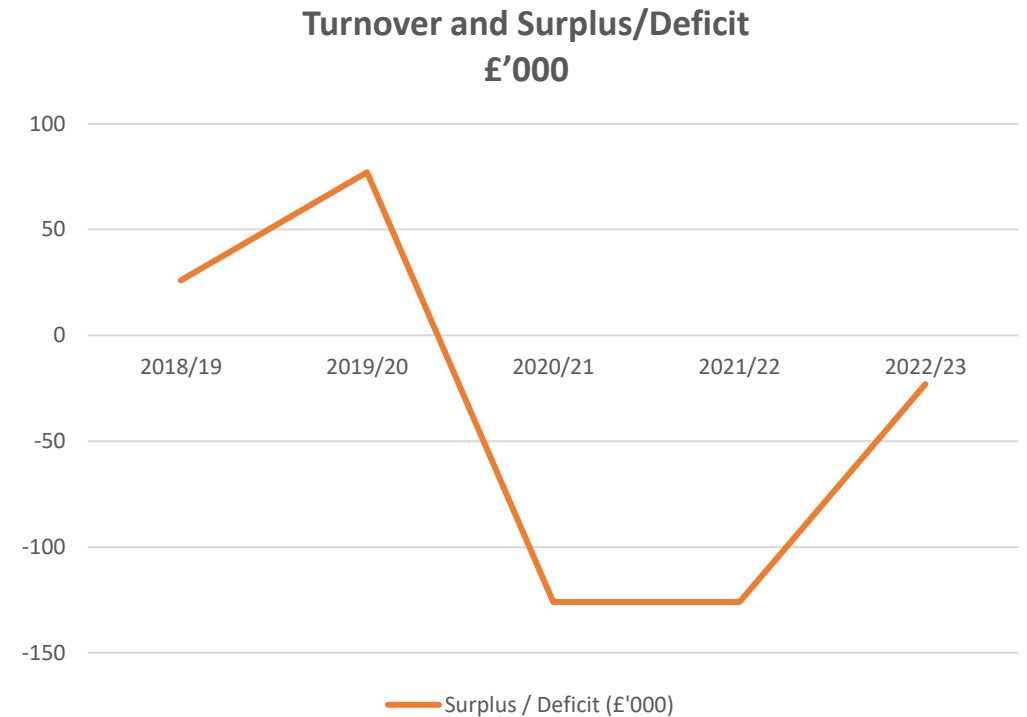
- ✓ No qualifications
- ✓ Audit prepared in accordance with applicable legal requirements
- ✓ Came in under budget
- ✓ UKinbound is a going concern

FINANCE UPDATE FY 2021/2022 (end September 2022)



FINANCE UPDATE FY 2021/2022 (end September 2022)

- Borders opened March 2022; furlough support ended September 2021. Members and organisation impacted through the pandemic
- Lack of face-to-face events led to reduced turnover – 2021/22 saw the reintroduction of live events with a successful (but much smaller than normal) WTM in November 2021 and Convention in September 2022
- Stronger income streams in 2022/23
 - 76% increase in events revenue in 2022/23
 - 19% increase in membership revenue in 2022/23



TOP FINANCIAL RISKS

- Government restrictions
- Source market challenges
- Weak cash flows of members
- UK and overseas economic weaknesses



MITIGATIONS

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



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CEO UPDATE

Joss Croft
Chief Executive



Membership Satisfaction Survey 2022-23

February 2023

Interim results (Mid fieldwork)

Qa Research
Merchant House,
11a Piccadilly, York, YO1 9WB
01904 632039 www.qaresearch.co.uk

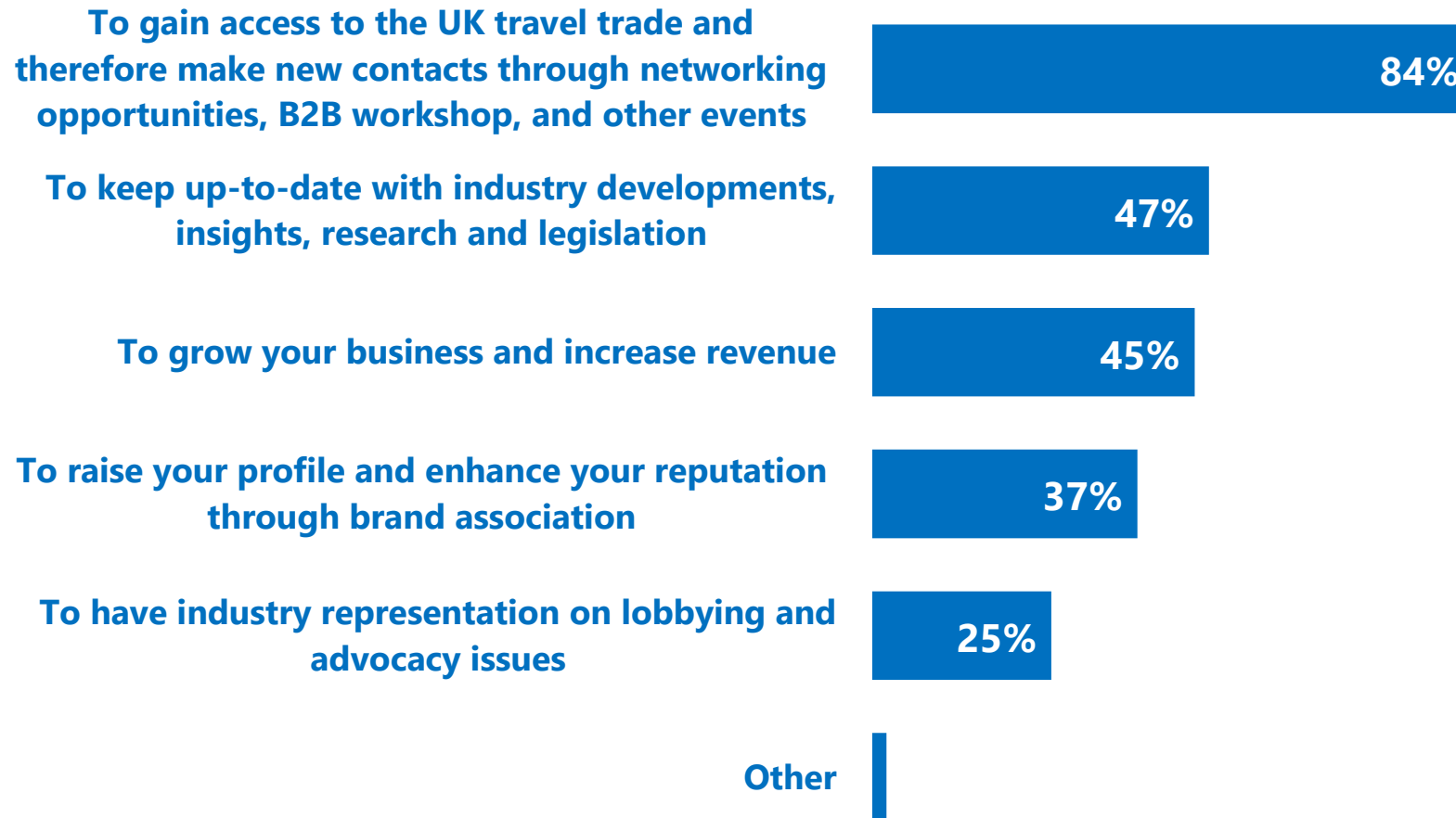


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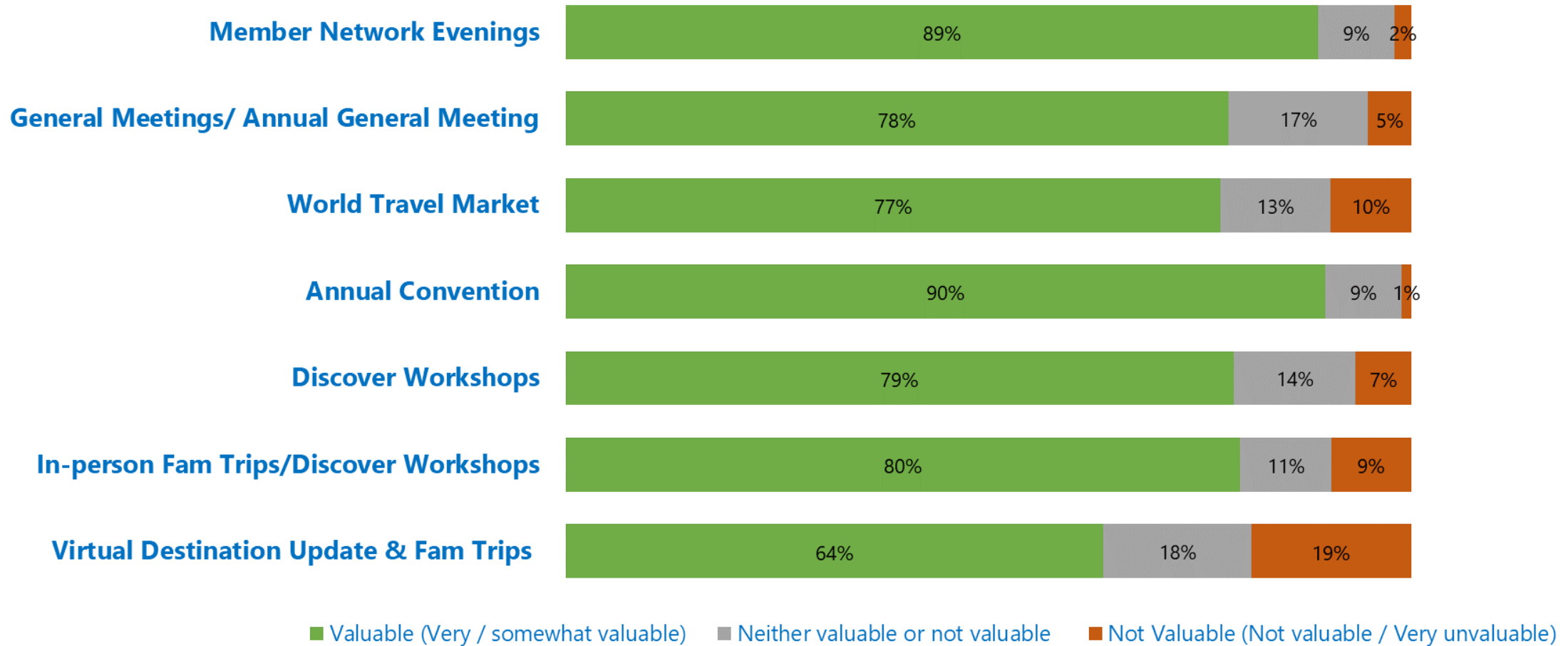
QaResearch

Networking continues to be the key reason for UKinbound membership



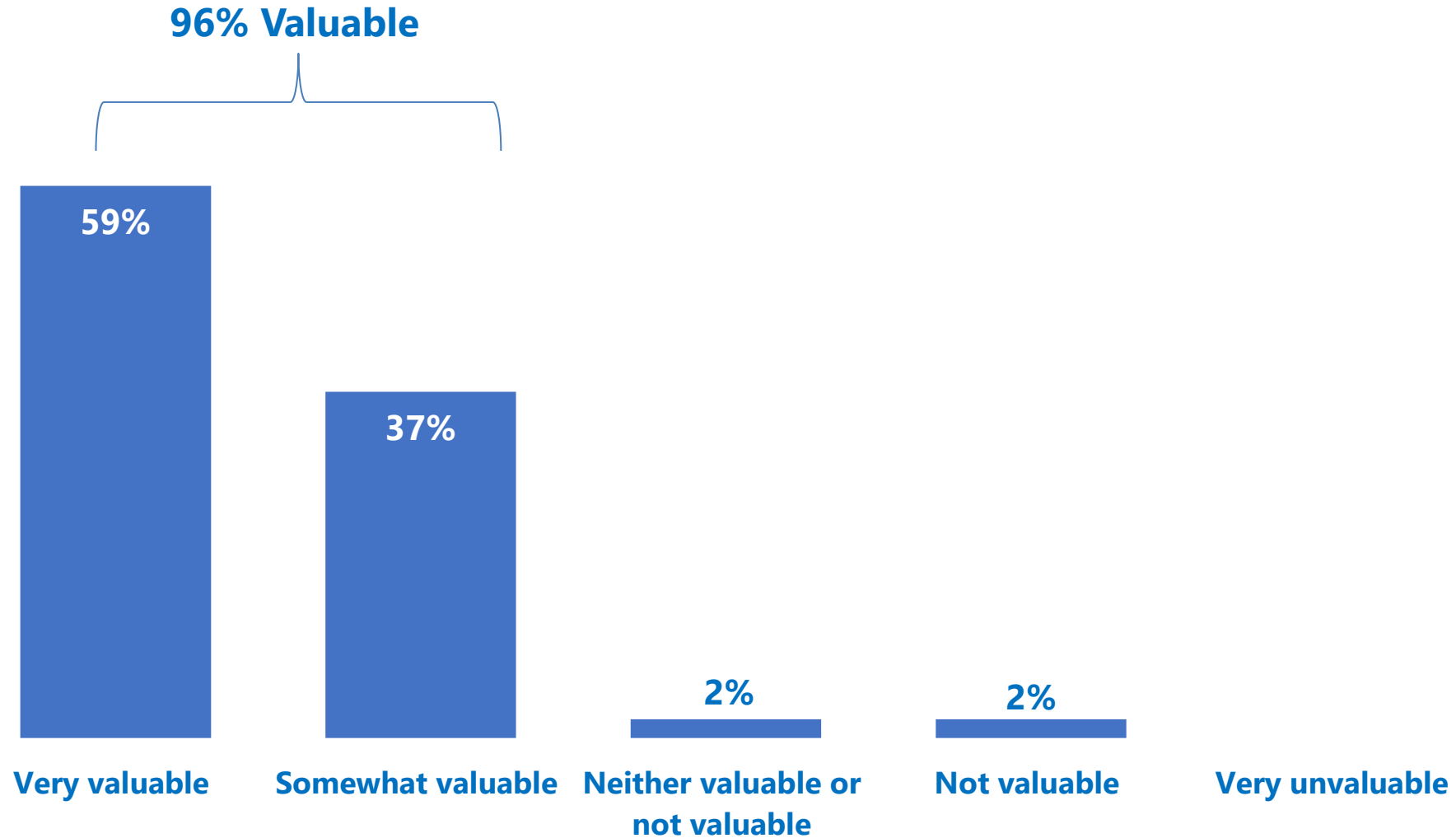
Gaining access to travel trade and networking continues to be the most important reason to join or renew membership – even more so than the previous year (58% in 2022)

The Annual Convention and Network Evenings are particularly valuable

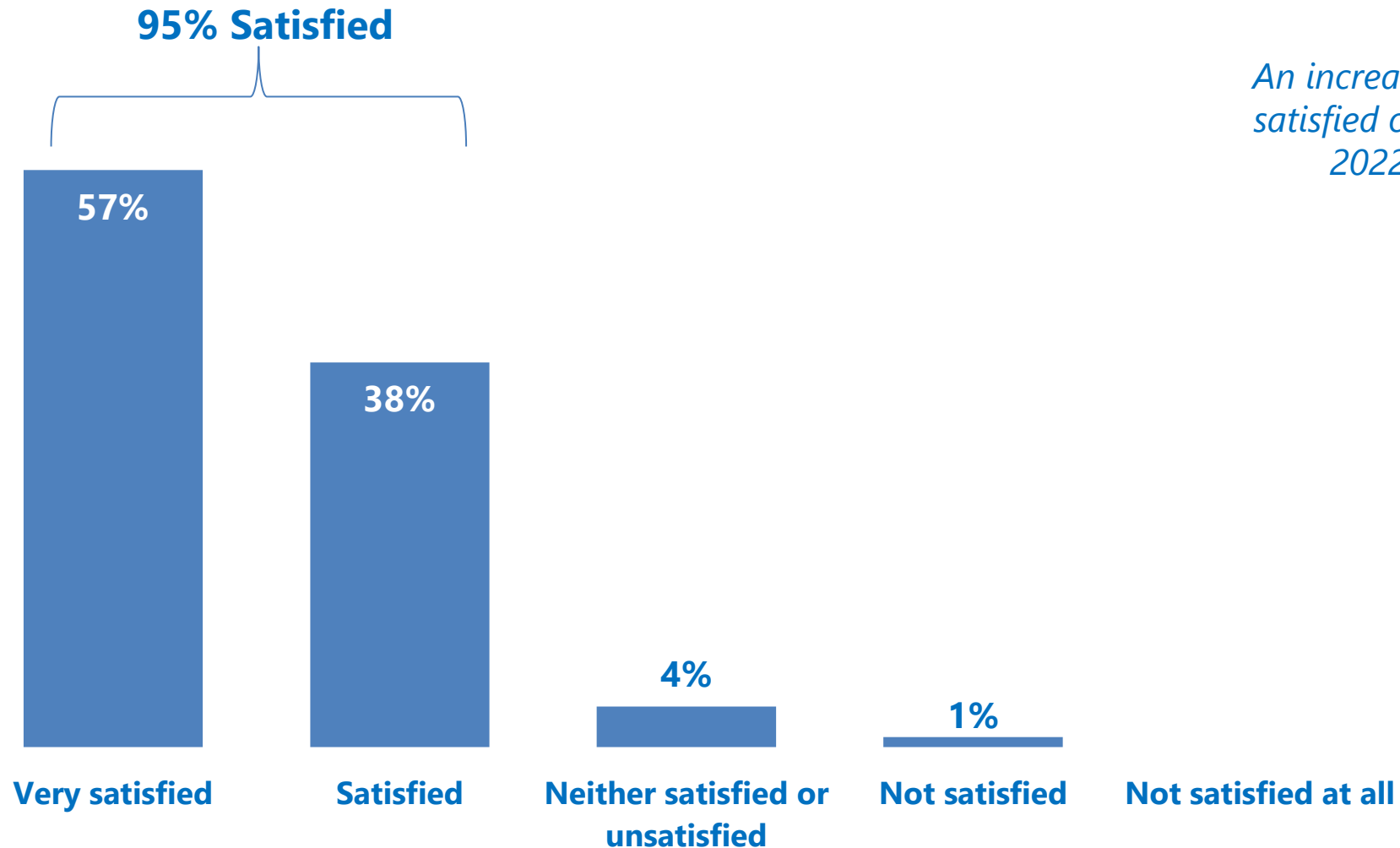


Q7. How valuable are the following events to your business? Base varies: 73-102 (not applicable responses removed). Percentages may add to more than 100% due to rounding.

UKinbound membership valuable for majority of members

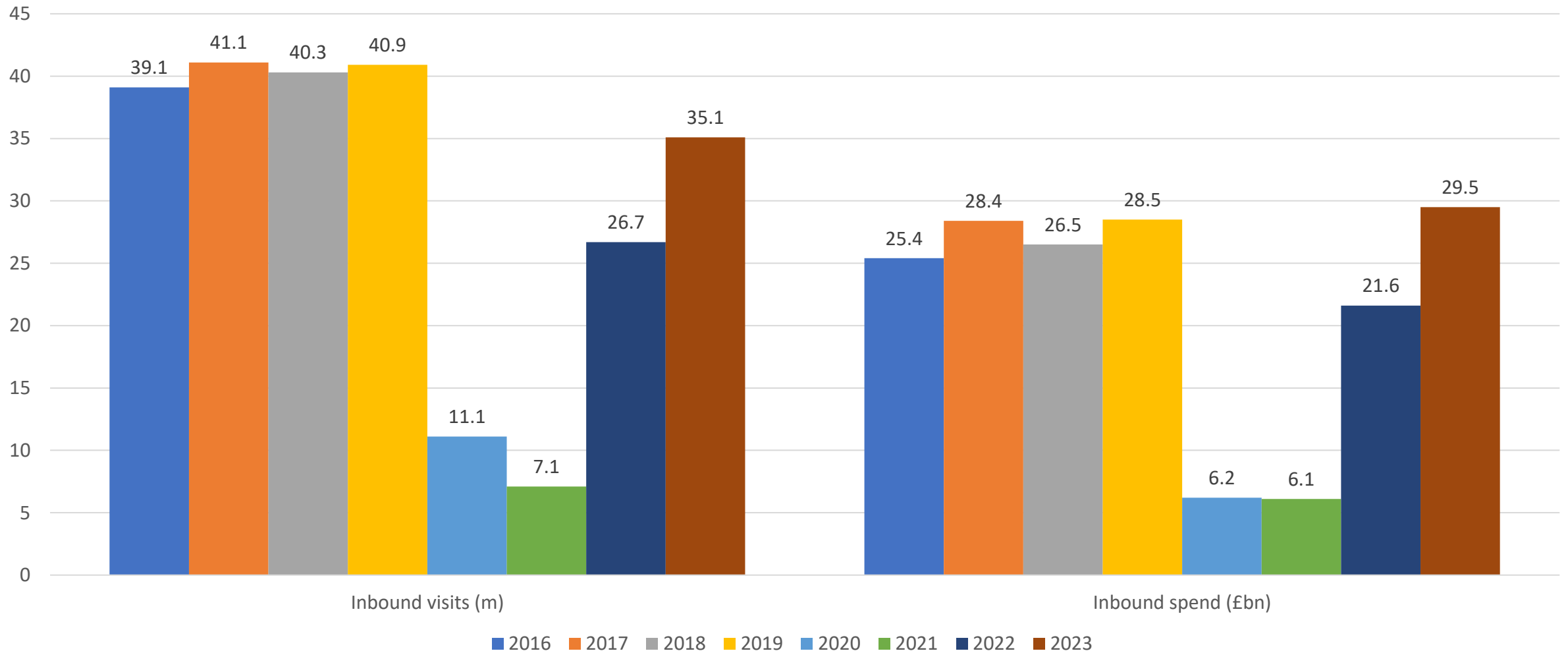


Members are satisfied with their UKinbound membership

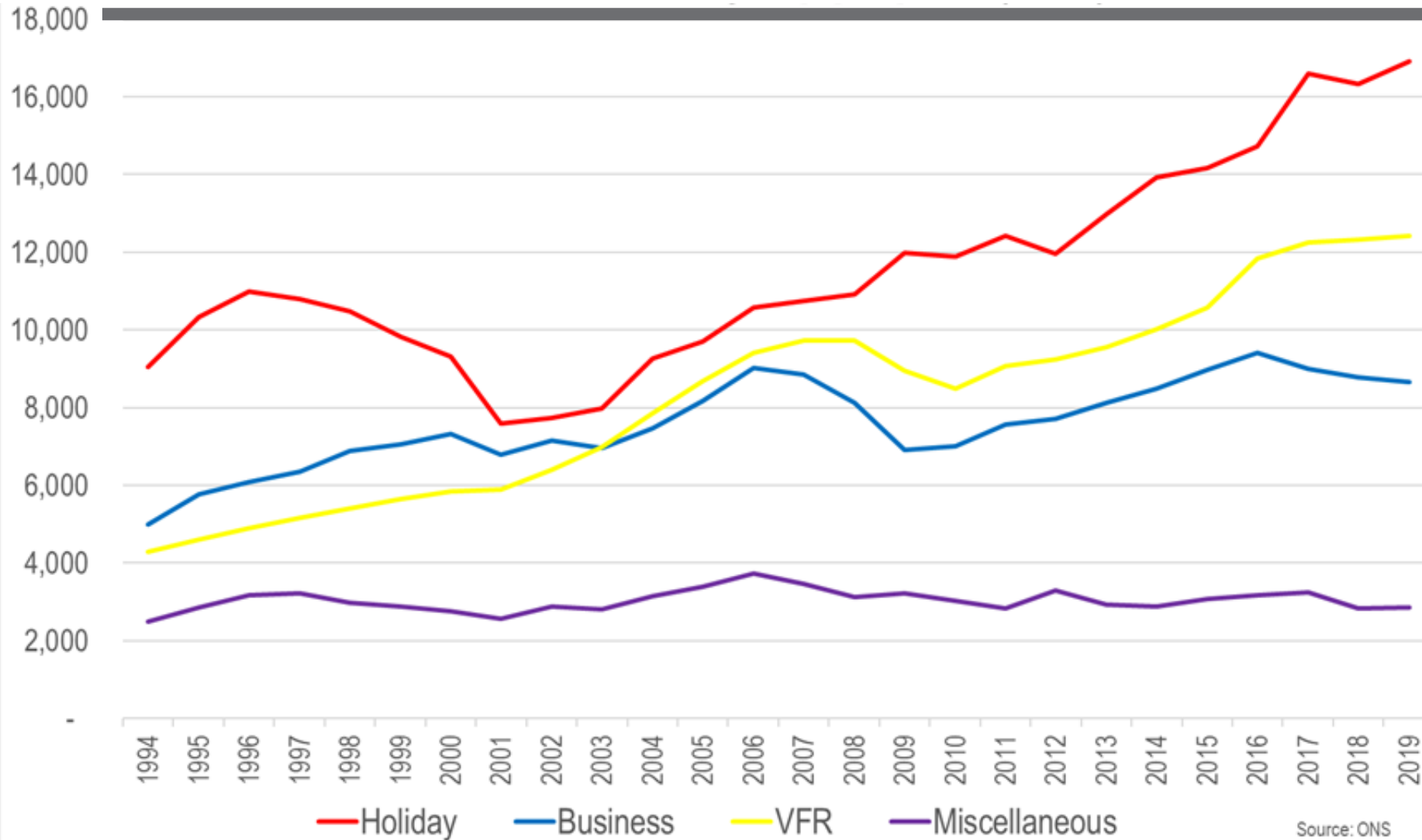


An increase in overall satisfied compared to 2022 (89%)

VISITBRITAIN INBOUND FORECAST 2023



18 YEARS OF INBOUND



Growth in Holiday Visits was already slowing.

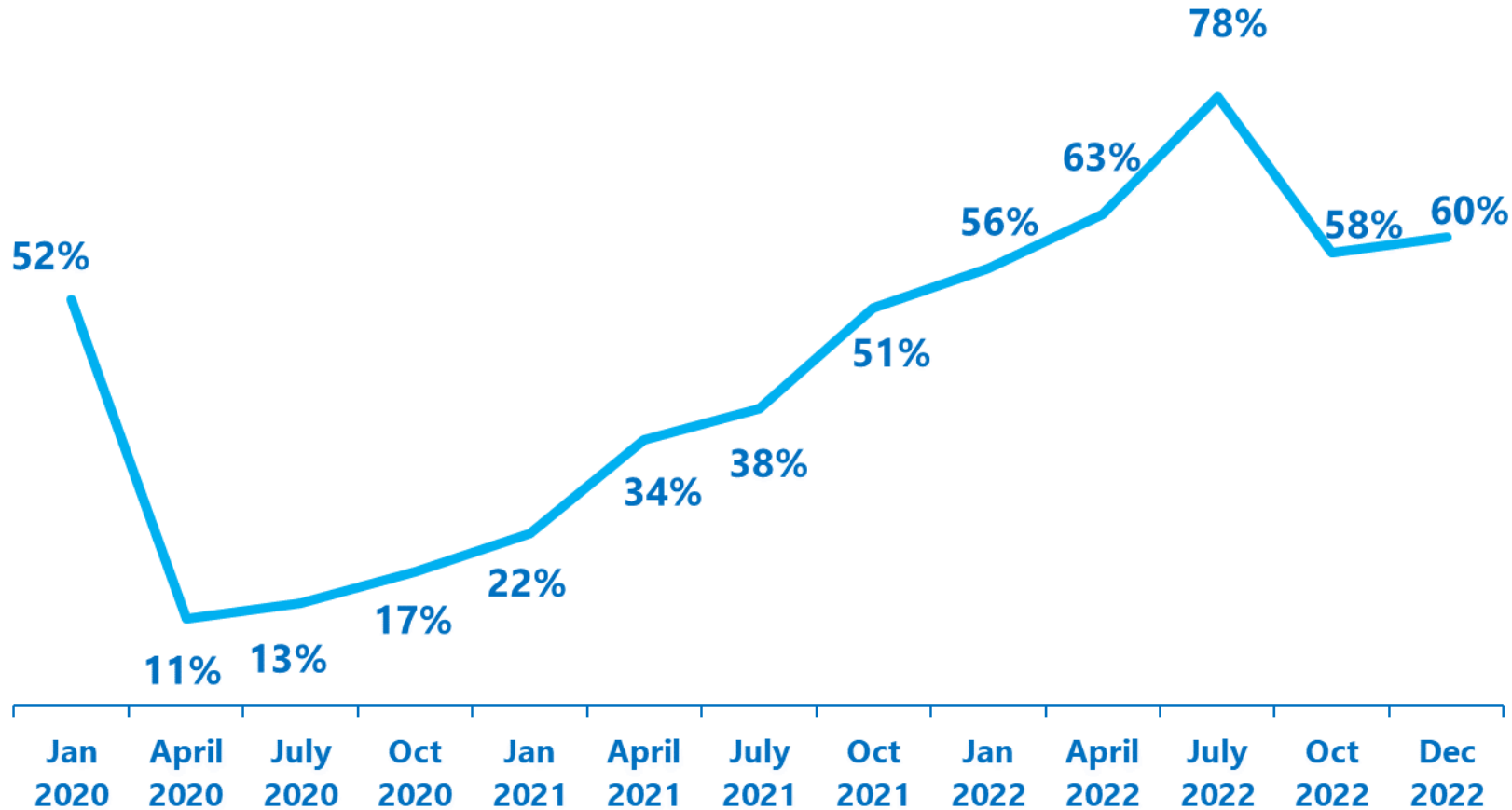
VFR growth has lost the impetus it had thanks to immigration from the EU

Business tourism tied to global economic growth and now in the Zoom era

Changed passport rules act as a brake on youth / EFL visits from the EU

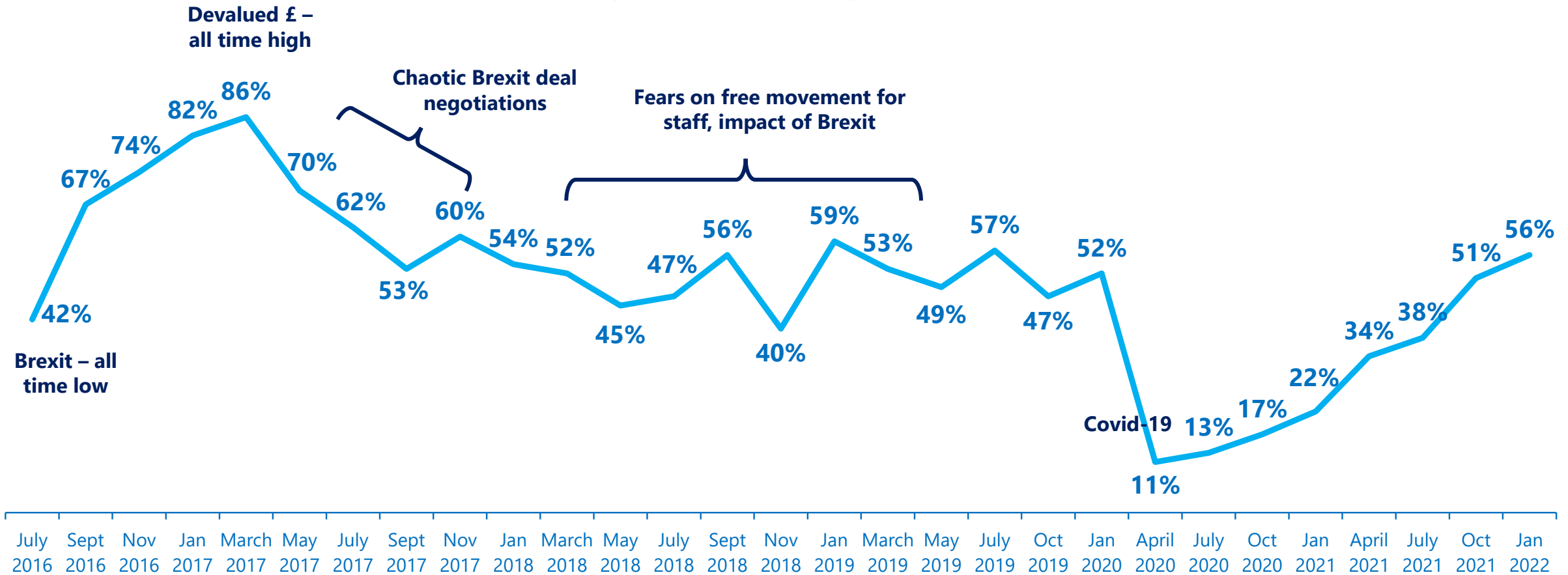
Confidence level increases slightly after a sharp decrease in the previous quarter

Following a sharp decline in confidence, this quarter shows a small increase from 58% to 60%.



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

July 2016 – January 2022



CHALLENGES AND OPPORTUNITIES

Demand side

- Visas
- ID cards
- ETAs
- APD
- Tax Free
- Image
- Confidence



CHALLENGES AND OPPORTUNITIES

Supply side

- Staffing
- Availability
- Rate
- Quality
- Events 2023



experientialtravel

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



QUESTIONS



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Richard Toomer

Executive Director
Tourism Alliance

Tourism*Alliance*
the voice of tourism



QUESTIONS



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**Thank you for your
continued support!**