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THE VOICE OF INBOUND TOURISM

A YEAR IN REVIEW 2019/20





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WELCOME FROM THE CHAIR



Writing an introduction for the Year in Review at this difficult time is tough. We all know what has happened over the last few months so I will not dwell on it too much. We have had to say farewell to much-loved colleagues and friends and have seen the demise of long-standing firms with more to follow.

It will be bad. Terrible even. Lots of companies will not survive and lots of people will lose their jobs, but in the end – and probably far sooner than we expect – the industry will be back on its feet. Restaurants will be full, we (tour operators at least) will be complaining about hotel rates, we will be flying all over the world to attend trade fairs, we will be complaining about jet lag, we will be gossiping about our competitors, we will have overbookings, we will have difficult clients, we won't be able to find venues for events or tickets for matches, we will be discussing overtourism and all the other annoyances which make us love our industry so much!

And what about the future? We are all going to change the way we do business, people won't travel in the same way as before, everyone will be working from home, the recovery will take years, people will be frightened to take holidays, the travel industry won't survive, conferences and trade fairs will not exist. We have all heard it, day in, day out for the last few months.

So my advice to all our wonderful members is this: don't give up, remember why you went into the industry in the first place, and look on this as a horrendous but temporary blip in your career. Use the time wisely and remain positive (if you can). You are not alone and all your colleagues and friends at UKInbound are here to support you at this difficult and historic time.

But is this really going to be the case? One thing we can be sure about is that human behaviour doesn't change. We want to socialise, we want to explore, we want to travel and we want to have fun! The number of people able to afford to travel around the world is increasing exponentially year on year. That we can all agree on. So here is my prediction based on nothing more than 30-odd years of experience and a hunch...

Oh, and if I turn out to be wrong then you can tell me to my face at the next networking evening!

Keep your chin up and see you very soon.

James Aitken, Chairman

WELCOME FROM THE CEO



What a difference a year makes. When I wrote the foreword for my first Year In Review in summer 2019, we were in the midst of a bumper year for inbound visits and spend, and our Business Barometer was showing a cautious return to optimism following a period of Brexit uncertainty.

Just six months later, the COVID-19 outbreak was fast becoming a global pandemic which soon triggered a complete shutdown of international (and domestic) tourism. The crisis has presented a significant and unprecedented challenge to the tourism industry and one in which the variables are constantly shifting.

Like all businesses, we have had to swiftly adapt and I am proud that we were able to quickly put in place initiatives. These included daily updates on the latest government information and guidelines, a new series of webinars to help members make sense of the crisis, and a new associate membership option to help more tourism businesses access our support network.

I have conducted numerous media interviews about the pandemic. I have also been attending weekly meetings of the Tourism Industry Emergency Response group and the Visitor Economy Working Group (formerly the Tourism Industry Council) to represent members and push for the support our sector needs.

While there remains much more to do to ensure the resilience and survival of the inbound industry, we have made significant gains in our advocacy work that has contributed to some important government support. Our lobbying efforts have influenced the government in significant ways this year: lowering the salary threshold for non-UK workers from £30,000 to £25,600 for Brexit; the introduction of the Coronavirus Job Retention Scheme; grants and rate relief for most – but admittedly not all – members, saving the industry and your businesses millions.

Throughout this time of crisis, I have been struck by our industry's determination in the face of adversity, and the fantastic mutual support our members have shown for each

other. There is a real sense of community among UKinbound members and this gives me great optimism that together we will pull through.

And let's not forget that there was life before the pandemic. I am delighted that we have welcomed 55 new members over the past year, bringing ever more variety, diversity and innovation to the membership. We also delivered events all across the country, were joined by over 60 exhibitors at what felt like one of the busiest World Travel Markets to date, and held our Annual Convention in the beautiful city of Bristol, bringing more opportunities than ever for delegates to connect, discuss and move the industry forward.

It is important to me that, as the voice of inbound tourism, the Association leads by example on key issues. Therefore I'm pleased that we have developed a new policy to ensure all our activities have sustainability principles at the forefront. I was also delighted to welcome our new charity partner, Revitalise, which does fantastic work in providing much-needed respite holidays for disabled people and their carers and helping tourism businesses become as accessible to as many visitors as possible.

With VisitBritain forecasting a 63 per cent fall in inbound spend in 2020, and Oxford Economics predicting that inbound visits will not return to its pre-COVID-19 level until 2024, the road to recovery will be a long and uncertain one. But I am confident that it will recover – and there is no doubt the new tourism landscape will bring its own set of opportunities. With new attitudes towards distancing and crowd management and a rise in the use of technology, a more sustainable and accessible future for tourism could well be on the horizon.

I look forward to continuing to work with you over the next 12 months as we rebuild. And while I absolutely recognise what a challenging time this is for the inbound industry, the Association needs to continue to work on your behalf, lobbying the government on issues that affect your businesses and delivering activities that drive much needed returns for your bottom line.

Best wishes,

A handwritten signature in black ink, which appears to read 'Joss Croft'. The signature is written over a long, thin horizontal line that extends to the right.

Joss Croft, CEO



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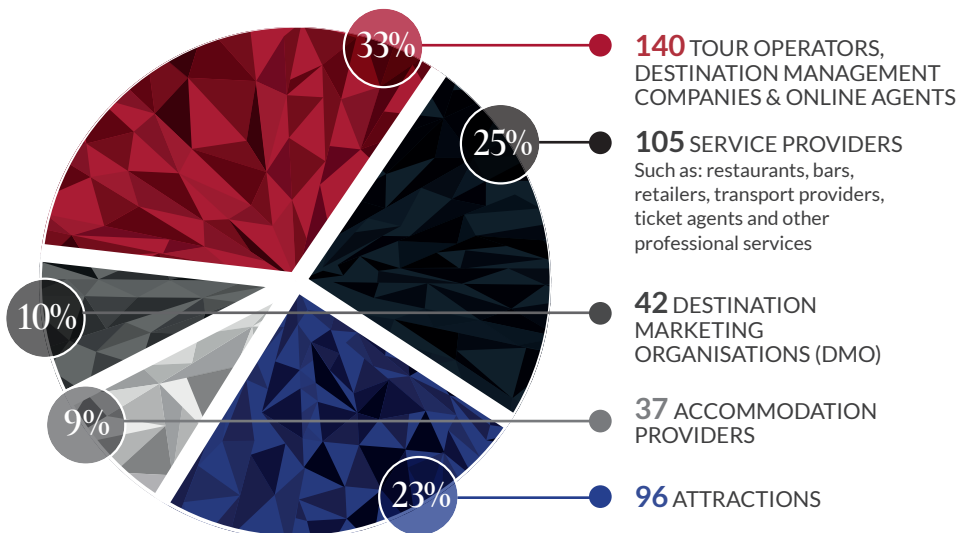


We would be delighted to assist you with your group enquiries and invite you to contact our dedicated reservations team on 01962 709900 or email: reservations@thewinchesterhotel.co.uk.

MEMBERSHIP UPDATE

We were delighted to welcome 55 businesses across all sectors and from all corners of the UK during the 2019/20 year, bringing our total to 420 members – our biggest membership community yet!

WHO ARE OUR MEMBERS?



This year has been an unusual and difficult one for the whole industry. Therefore our priority in recent months was to support our members through the pandemic via a range of initiatives. These included daily updates on the latest government information and guidelines, and a new series of webinars to help members make sense of the crisis. We also introduced a new, temporary, associate membership option to help more tourism businesses access our support network, and have been pleased to welcome over 140 associate members since May.

We know from speaking to new members that it can sometimes be difficult to know where to start – from contacting other members to attending events and raising your profile among 400 other businesses. That's why we have continued our series of Membership Masterclasses where experienced members share their advice and

top tips on getting the most out of membership. We also launched a buddy system at our networking evenings to help new members to make contacts, and we have implemented a six-month check-up in addition to regular contact from the membership team.

Engaging with all of our members continues to be a top priority so that we can continually develop and improve our offer and to better understand how to help each member achieve their goals – whether it's through lobbying for the right business support, improving the relevancy of our activities or helping members make the right connections in the travel trade.

If you'd like to discuss your membership, please contact **Antony Amos** at antonyamos@ukinbound.org – we would love to hear from you.

THANK YOU TO OUR MEMBERS

To mark the start of the new decade, we launched a new certificate in special recognition of our longest-standing members, some of whom have been part of the UKinbound community for over 35 years!

Whether you have been a member for three months or three decades, we'd like to thank all of you for continuing to support the Association and for your commitment to the travel trade.

As a new member, we have found UKinbound invaluable to our organisation, particularly during the past few months. We have continually been kept informed of the latest developments, guidance and business support which has been crucial in helping us to adapt. It's also allowed us to provide our own members with the best possible guidance. As a DMO, it is vital that we have strong relationships with the travel trade and membership of UKinbound allows us to connect with key buyers in the industry and promote our fantastic destination – this is going to be more important than ever as we start to welcome visitors back to the Cotswolds. We look forward to continuing to work with UKinbound and its members in the coming year.

COTSWOLDS TOURISM

ADVOCACY UPDATE

Twelve months ago, UKinbound's lobbying activity was dominated by the looming prospect of Brexit and how to ensure the industry's long-term success once the UK leaves the European Union (EU). A key concern among members was continued access to the skills – in particular foreign language skills – that are vital to inbound tourism businesses.

This is why we partnered once again with Canterbury Christ Church University and Qa Research to launch a major piece of research in October 2019 which demonstrated how the end of free movement, as outlined in the government's proposed post-Brexit immigration reforms, would impact the UK's tourism workforce.

The report, *A Perfect Storm? The End of Free Movement and its Impact on the UK Tourism Workforce* showed that a startling two thirds of tourism businesses said the proposals would negatively impact their ability to continue to operate. A limited labour market and a lack of home-grown talent with foreign language skills were cited as the key reasons for the need to have continued easy access to EU workers post-Brexit.

Using our findings we urged the government to: include foreign language skills within the new points-based immigration system; to lower the salary threshold for non-UK workers and to undertake quarterly independent reviews to ensure that tourism sectors are not adversely affected.

Although foreign language skills are not currently included in the new points-based system, nor the industry's call for a temporary, time-limited scheme for EU workers, we were pleased that our lobbying efforts paid off when the government lowered the salary threshold for non-UK workers from £30,000 to £25,600.

While we will continue to push for the recognition and importance of foreign language skills within the industry, the majority of this year's lobbying focus has unfortunately been around trying to limit the damage to the industry caused by the outbreak of COVID-19.



COVID-19 IMPACT

The COVID-19 outbreak began to impact member businesses – particularly those reliant on Chinese visitors – weeks before it reached pandemic status. In February, we wrote to the newly appointed DCMS Secretary of State, The Rt Hon Oliver Dowden MP and Tourism Minister Nigel Huddleston MP to ask for an urgent package of business support measures such as a pause on business rates, VAT and PAYE taxes, and low- or zero-interest business loans.

As the crisis progressed, we quickly put in place daily updates on the latest government information and guidelines and worked with members to understand what their businesses needed to survive.

While we welcomed government support measures such as the Coronavirus Job Retention Scheme, rate relief, cash grants and government-backed loans, it became clear that many tour operators, DMCs and OTA members were unable to secure the support they needed from local authorities as they did not meet the criteria for a leisure business. This highlighted a lack of understanding of how the industry operates and as a result, a core focus of our lobbying activity and media engagement has centred on promoting a better understanding of the importance of intermediaries to the success of the entire industry.

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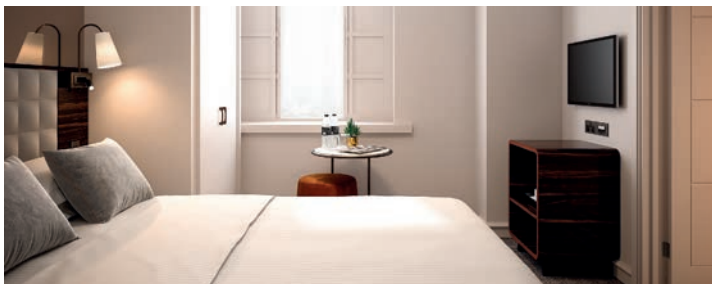
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UKINBOUND
2019 AWARDS FOR EXCELLENCE
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UKI YEAR IN REVIEW 2019/20

As restrictions started to ease, our focus shifted towards recovery and helping members adapt to safely welcome visitors. We supported VisitEngland on its 'We're Good To Go' quality assurance scheme, conducted sector-specific roundtables to better understand their unique challenges and opportunities and continued to work closely with VisitBritain, DMCS and other industry bodies to ensure members receive clear guidance on reopening safely.

The survival of our tour operator and DMC members remains a top priority – many rely solely on international visitors, and supplier members also rely on inbound business from these operators. A survey in June of our buyer members found that 88 per cent of respondents were set to make large scale redundancies, and over half expected their business to last no more than six months. Using these findings we campaigned for further government support to ensure the sustainability of the sector into spring 2021 and will continue to do so for the rest of the membership year and beyond.

ACCESSIBLE TOURISM

We were pleased to launch a new charity partnership with Revitalise – a national charity that creates much-needed respite holidays for disabled people and their carers. In support of the Tourism Sector Deal's aims for the UK to become the most accessible destination in Europe by 2025, Revitalise is working with members to help them understand how best to support and welcome disabled visitors and become as accessible to as many visitors as possible.

We are also developing an Accessible Awards Scheme with Revitalise that will allow disabled people to access rich and helpful information about member businesses so they can visit in confidence, and to recognise the businesses that have made efforts to maximise their accessibility to as many guests as possible. To find out more about working with Revitalise, or to contribute to its fantastic excursion programme for disabled people and their carers, please email communications@ukinbound.org.



Our reception at World Travel Market in The Crystal

SUSTAINABILITY

Over the past year, UKinbound has taken steps to integrate sustainability principles into our operations and to promote a broader sustainability agenda as part of our professional activities. As part of this, we have developed a sustainability policy that will guide the management of the organisation, champion sustainability practices, reduce the environmental impacts of all our activities and help our members do the same.

This includes minimising the need for our team to travel by supporting video conferencing and flexible working arrangements, minimising paper products, using recycled or recyclable materials where possible and using local suppliers to reduce carbon footprint. For our events, we request host venues supply their policy outlining their commitment to sustainability and wherever possible minimise single-use plastics and non-recyclable waste, provide recycling facilities and use renewable energy sources.

Our WTM reception in November 2019 was held at The Crystal in east London – one of the world's most sustainable events venues – and we were pleased to welcome Green Tourism as our first ever sustainability sponsor at the Annual Convention in February. We look forward to continuing to work together to further develop our sustainability practices over the next year.

I have been a member of UKinbound for as long as I can remember and have always been a firm supporter of the Association. Over the last few months, the support and empathy I have received for my business has been nothing short of outstanding and is second-to-none. The team are professional but also human and caring and have gone beyond their duty to voice our concerns and lobby passionately to ensure that our sector receives adequate support from government. At times of crisis this is the type of support that you can't do without and I will personally remember what UKinbound has done for me and my business for many years to come.

E-VOYAGES GROUP

EVENTS UPDATE

Over the past 12 months the team has organised over 40 events, which included hosting the UK stand at World Travel Market and our Annual Convention in Bristol. We also delivered a series of online webinars for the first time, which were free for members to attend.

Although COVID-19 meant that our in-person events were put on hold part-way through the year, we were pleased to have been able to showcase a fantastic range of destinations, attractions and venues via familiarisation trips, Discover workshops, general meetings and networking evenings across the country before lockdown came into place.



The 2019 World Travel Market

The World Travel Market (WTM) in November 2019 was one of the busiest to date. We were joined by over 60 member businesses on the UKInbound stand who showcased their fantastic products to the global travel trade. A feedback survey after the show found that:

- 92% of respondents expected to secure new business
- 75% believed WTM 2019 offered long-term business prospects
- 75% expected to see ROI within the next 12 months

I can honestly say that this has been our best WTM to date. The quantity and quality of business was exceptional.

It is always a great experience being part of WTM with UKInbound. Everyone is together on one stand and there is a real team spirit across stand holders. I would not hesitate to be part of this again in future years.

After the UK-wide lockdown came into place, the Events team adapted swiftly to deliver a series of webinars. These initially set out to help members make sense of the immediate crisis and understand the legal, financial and reputational implications for their businesses. They later evolved to include broader topics such as market-specific insights, recovery strategies and sales and marketing best practice. A highlight of the series was our Meet the Tourism Minister webinar where 400 attendees heard from and had their questions answered directly by Nigel Huddleston MP.

UKInbound's events programme provides valuable opportunities for members to network, showcase their products and secure business – and we understand the importance of being able to do so face-to-face. We are closely following government updates and guidelines on events and will be relaunching our in-person events programme as soon as it is safe to do so.



Members enjoying a fam trip in Windsor



LOCATIONS OF OUR TRIPS AND EVENTS

If you are interested in hosting a networking evening, fam trip or Discover workshop in 2021 please contact events@ukinbound.org. For the latest events programme please visit www.ukinbound.org/events.

A LOOK BACK AT THE ANNUAL CONVENTION

Our 2020 Annual Convention brought together more than 300 delegates to the wonderful city of Bristol. The event provided invaluable opportunities for business development, networking and hearing the latest insights and opinions from industry leaders.



This year's winners



Gala dinner at the Aerospace Bristol



Bruce Daisley delivering the keynote

Highlights included a keynote from former Twitter vice president, Bruce Daisley, on the evolution of work culture and getting the best from your teams; a major B2B workshop which saw more than 300 one-to-one business appointments take place, and interactive workshops for buyers and suppliers to discuss the challenges and opportunities facing their sectors – the outcomes of which will be used to inform our future advocacy priorities.

Our glittering Awards for Excellence gala dinner meanwhile took place beneath the wings of Concorde at the Aerospace Bristol, where we celebrated the innovations and achievements of our fantastic industry over the past year.

Bringing the spotlight to the host city, our informal networking evening at Bristol Museum & Art Gallery celebrated Bristol's status as UNESCO Creative City of Film through themed activities and competitions, and a range of fam trips in Bristol and Bath on the last day saw delegates enjoying the best of the two beautiful cities.

OUR ATTENDEES SAID:

The UKinbound Annual Convention is the most useful, time appropriate event of the year for networking and developing new business. When budgets are getting tighter, this event is one of the most cost-effective to attend and is the last to be dropped.

The convention is put together really well and serves its purpose to enable the travel trade to network, grow business, understand the market and forge new relationships. I have never seen an industry event where information is passed and deals are done in such a friendly, well-organised way.

The UKinbound convention continues to go from strength to strength. It showcases not only fantastic and diverse destinations, but also creates a level playing field for novices and experienced hands alike to meet like-minded professionals and plan new business opportunities.

We look forward to bringing the industry back together for Annual Convention 2021, and will be announcing the host destination at our September general meeting.

MARKETING & COMMUNICATIONS UPDATE

Our Marketing and Communications team is here to help members raise their profile and market their products and services, engage with trade and consumer media to raise awareness of the value of inbound tourism and the key issues facing the sector, and ensure that members are informed of the latest industry insights, policy developments and business opportunities.

Throughout the COVID-19 pandemic we have sent out daily digests with the latest government regulations, updates and guidelines to keep our members as informed as possible, and will continue to share the latest information as the situation develops.

OUR ACHIEVEMENTS OVER THE LAST YEAR INCLUDE:

SOCIAL MEDIA



4,500+
followers (up 15%)



5,000+
followers (up 65%)



We also launched our
**FACEBOOK COMMUNITY
HUB**, which is approaching
300 members

WEBSITE



ukinbound.org

MEDIA COVERAGE



532

PIECES OF
MEDIA COVERAGE
(up 86% from 2018/19)



45% trade media
55% consumer media

MEMBERS' NEWS

We helped

110

MEMBER BUSINESSES

to promote
their products,
services and
updates via:



215 NEWS
STORIES

8 COLUMNS IN
GROUP TRAVEL
WORLD MAGAZINE

18 BESPOKE
MAILINGS

Geotourist's UKinbound membership plays a vital part in developing and maintaining our key relationships within the UK travel and tourism industry. A bright and vibrant commercially focused organisation, UKinbound delivers an event programme that has enabled us to create and develop successful and enduring business relationships. Their marketing services also gives us opportunities to share Geotourist developments with the industry and supports our UK news distribution.

GEOTOURIST

PRINT PUBLICATIONS

We also produced a magazine for World Travel Market, a brochure for the Annual Convention and our annual Members Directory. Our new UKinbound Map was a huge success with over 70,000 copies distributed to our tour operators and concierges. It continues to be the only free map of the UK and London.



To find out more about our marketing services please contact
Cindy Ng, Head of Marketing and Communication at: cindyng@ukinbound.org



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- **Support from B2B offices** in markets to raise the profile of your venue
- **Support from the VisitBritain Shop team** at global industry events

Get in touch to work with us: Product@visitbritain.org



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VisitBritain Trade Website

The VisitBritain trade website (trade.visitbritain.com) provides essential resources for the international travel trade and UK suppliers.

The site includes:

- **Destination** information
- **Itineraries** showing new product
- **Discover England Fund** project hub
- **Food & Drink** product development
- **Rail and BritRail** product development
- A new improved **supplier directory**
- **What's new** - keeping you up to date with industry news
- **Research and insights**
- **Events calendar** for the forthcoming year
- Promotional opportunities
- **Business support**

Visit the trade website to access all information and resources:

trade.visitbritain.com



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