



UKINBOUND
THE VOICE OF INBOUND TOURISM

INBOUND IN THE YEARS AHEAD
TTI CONFERENCE
23RD SEPTEMBER 2021

WHO ARE UKINBOUND?

The Trade Association for businesses involved in inbound tourism

Over 300 members, including:

- Inbound Tour Operators
- Attractions
- Retailers
- Sightseeing Providers
- Professional Services
- Accommodation Providers
- Restaurants and Bars
- Transport Providers
- Ticket Agents
- Destination Marketing Organisations

WHAT DOES UKINBOUND DO?

Growing our members' businesses:

- Networking events
- Seminars
- Annual Convention
- B2B speed networking
- Discover workshops
- Familiarisation trips
- Social media reach
- Marketing activity
- Lobbying Government
- Exhibitions

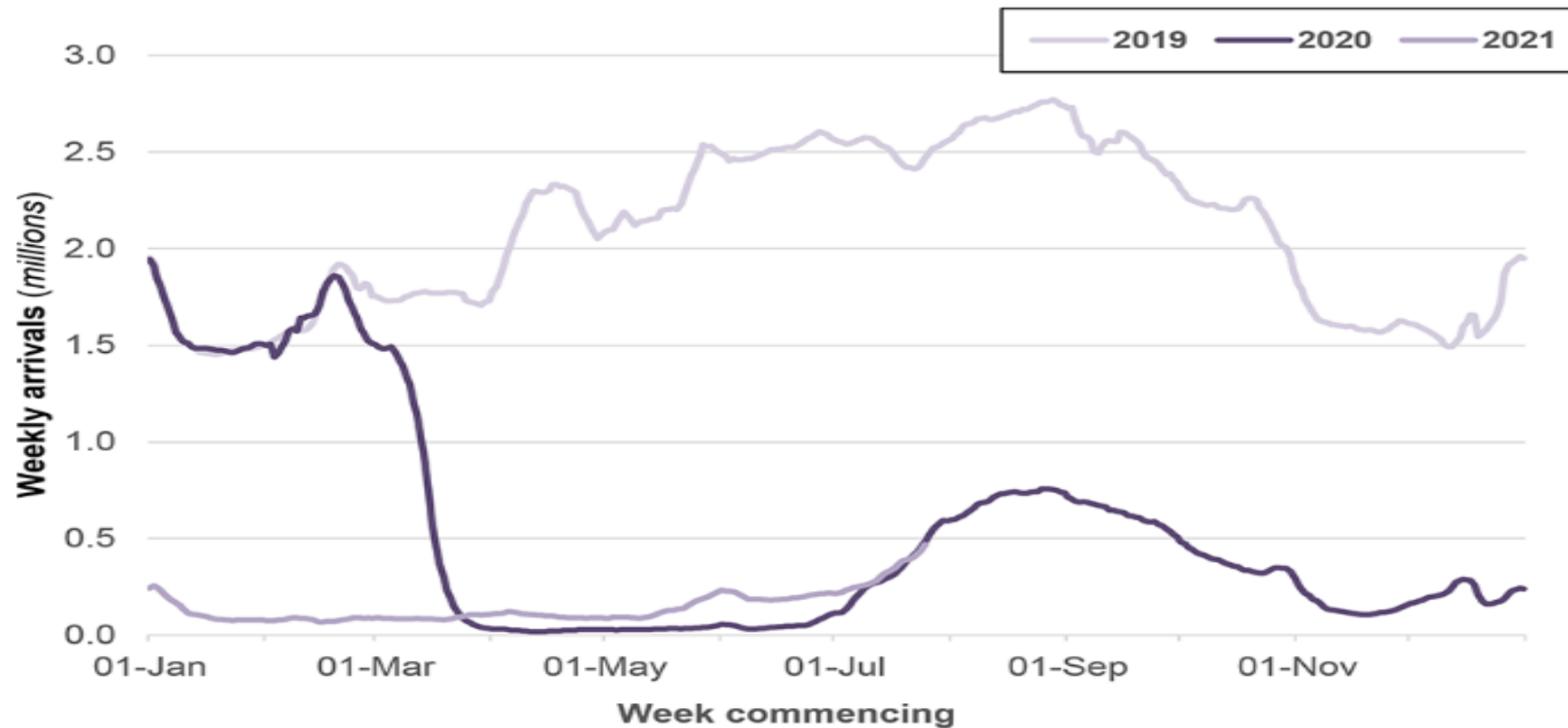


WHY IS INBOUND TOURISM IMPORTANT?

- 41 million visitors to the UK in 2019
- Average spend 3x a domestic visitor
 - Spending £28.4 billion
- 5th largest export earner - on par with the automotive and pharmaceutical industries
- Employs 3.3 million people (manufacturing 2.9m, construction 2.4m) – 500,000 in inbound
- Soft power lever – impacting UK's image – education, trade, investment

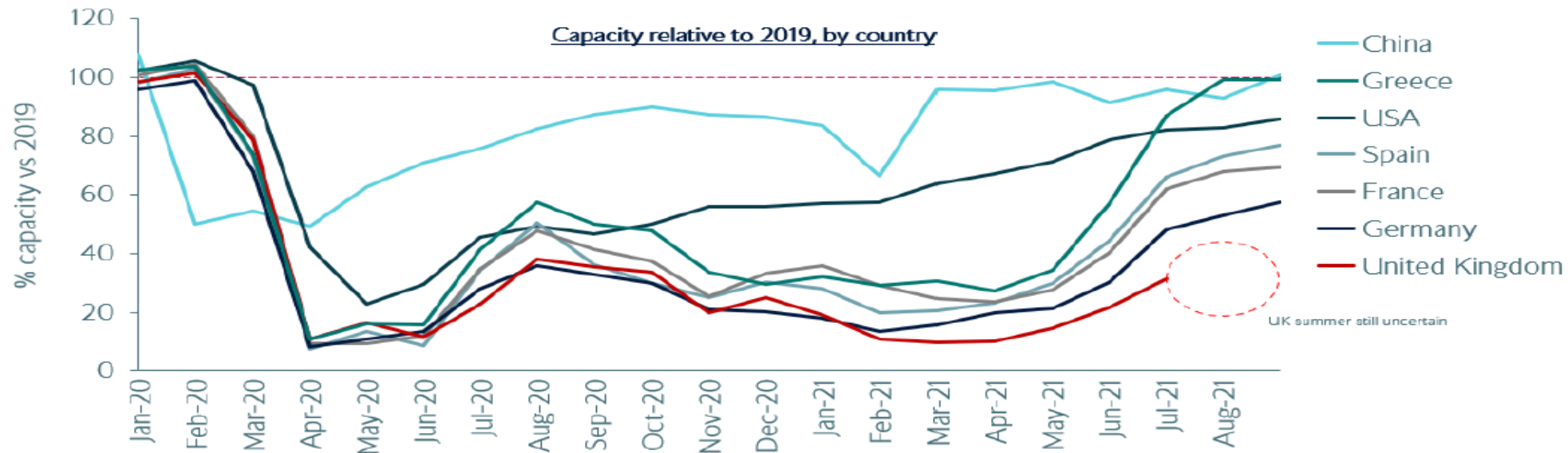
CURRENT STATE OF INBOUND

Figure 1: Weekly air passenger arrivals to the UK, Jan 2019 - Jul 2021



COMPETITIVE POSITION

UK aviation has fared particularly badly, relative to other major markets, and is now trailing other EU peers

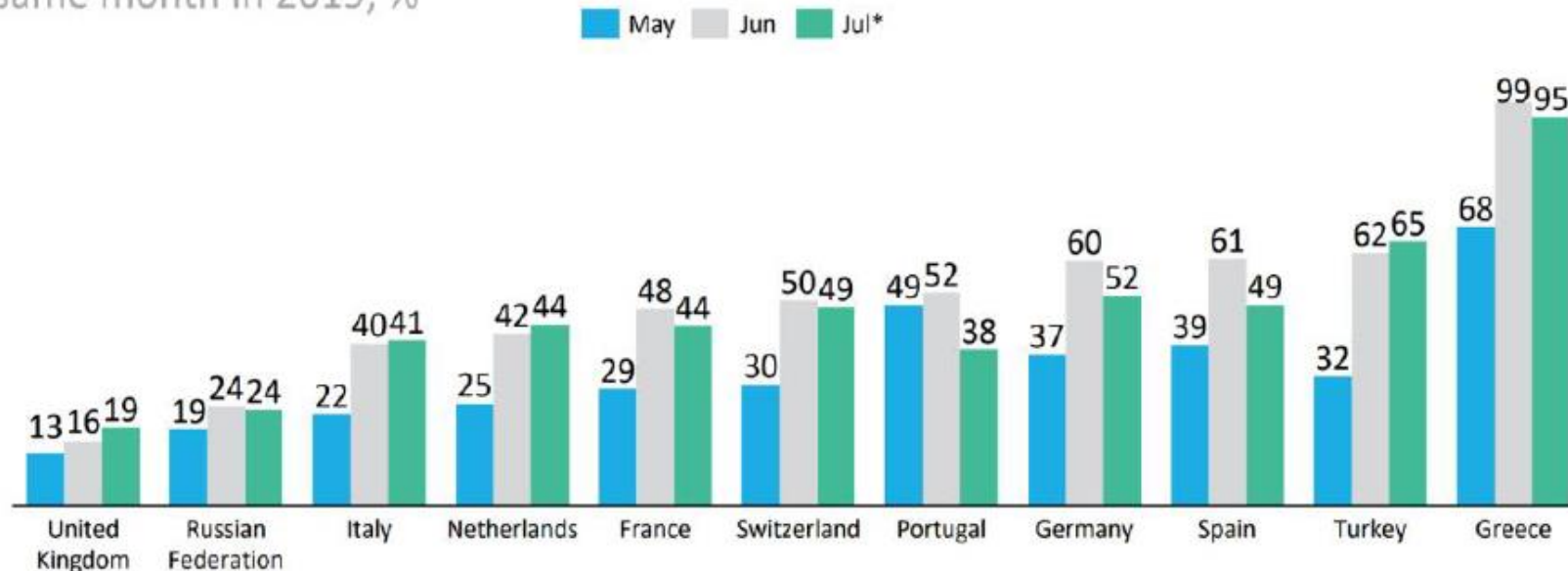


- Key aviation markets of China and USA have strong domestic capacity which has helped a steady recovery since the lows early on in 2020
- European peers that saw similar lows to the UK last year have been recovering in 2021, with recent EU developments on the travel pass feeding a summer surge that the UK lagged behind

COMPETITIVE POSITION

Passenger bookings are picking up in most European countries, with Greece almost reaching pre-crisis levels

Number of international ticket sales to/from selected countries in May-July 2021, as % of same month in 2019, %



* First 15 days of July covered in both 2019 and 2021



COMPETITIVE POSITION

GTT announcement 17 Sept

(for fully vaccinated)

- Removal of pre-departure testing
- Removal of day 2 PCR test
- Introduction of day 2 lat flow
- Removal of traffic light system
- Additional markets off red (Japan, S Korea, Israel)

....but....

- Still not competitive
- Questions on
 - Cost
 - Process
 - Reporting
- Vaccination recognition

PUBLIC SENTIMENT

YouGov

YouGov COVID-19 measures supported tracker: quarantining all inbound airline passengers

% of people in each market/region who say they would support their government: quarantining all passengers on all flights coming into country/region



YouGov

YouGov COVID-19 measures supported tracker: stopping all inbound flights

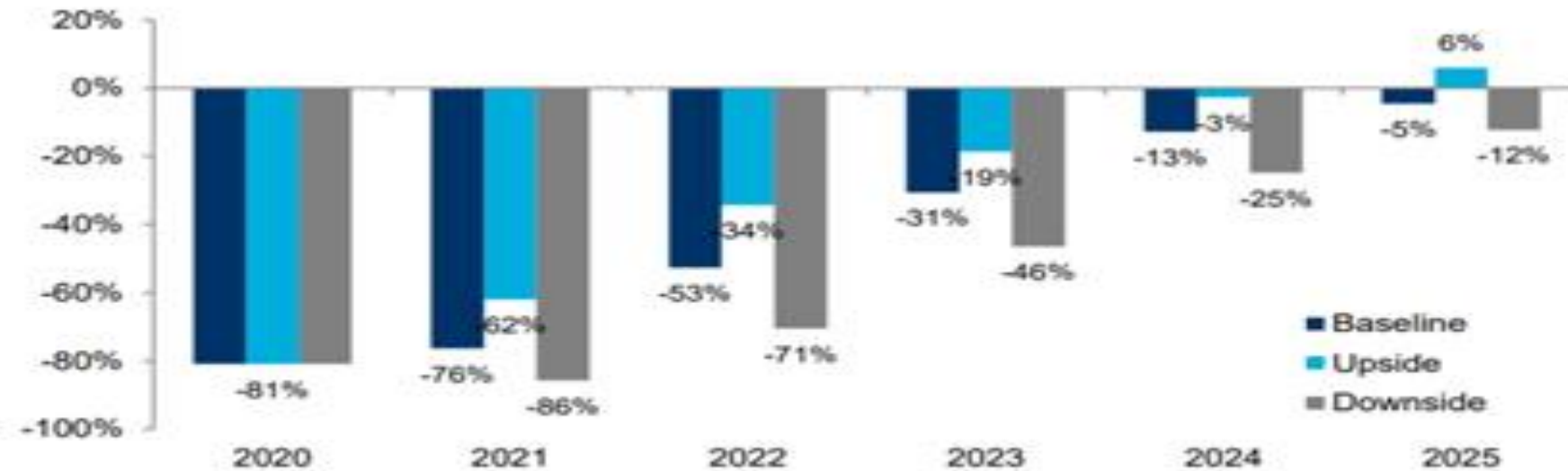
% of people in each market/region who say they would support their government: stopping all inbound flights coming into country/region



INBOUND PROJECTIONS

Int'l spend by scenario, UK

Relative to 2019 levels



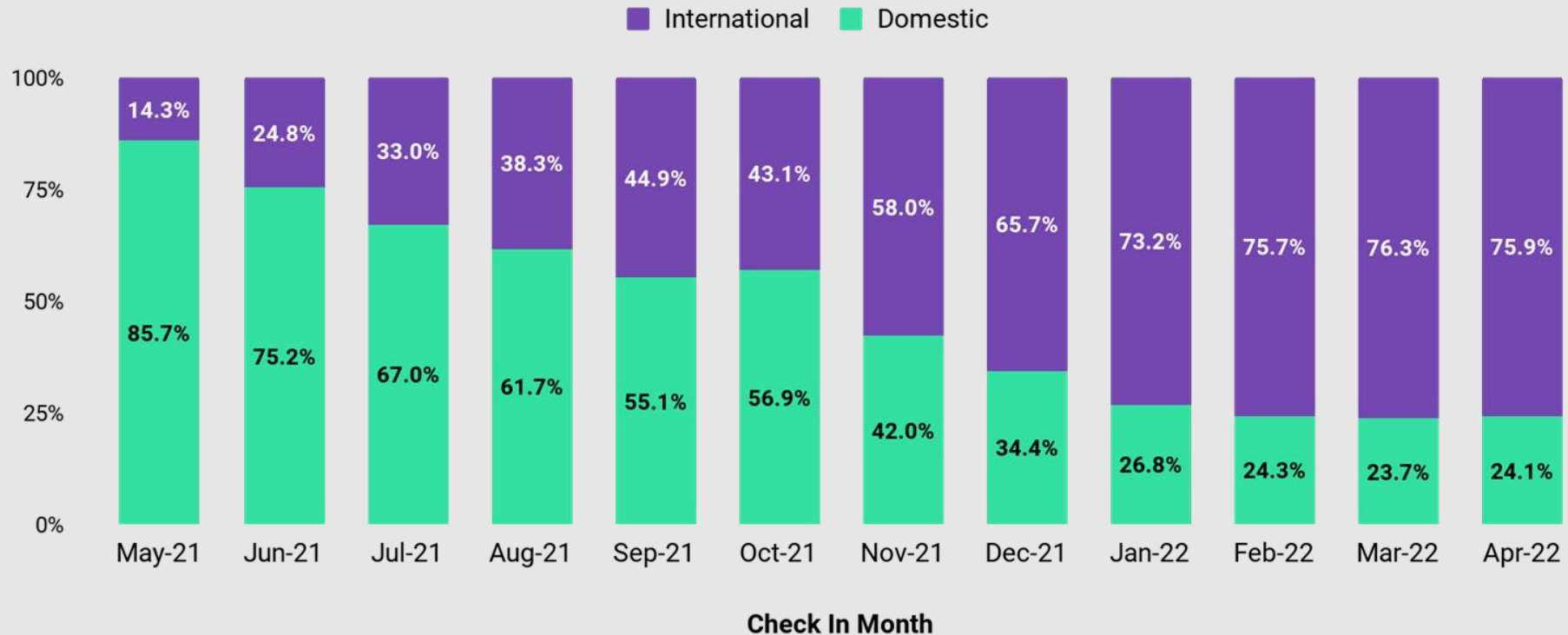
Source: Tourism Economics

The majority of travel being booked for 2022 travel dates is for international destinations

More than 75% of the travel planned for 2022 is for international getaways

Distribution of Travel Intent by Check In Month: Domestic vs International

Global IPs | Week 20, 2021



ISSUES

When the tide goes out, you can see who's not wearing swimming trunks.

The darkest hour is before dawn.

Success can be holding on when others let go.

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PRIORITIES

- Sector specific support
 - Tourism Export Recovery Fund
 - Furlough
- Global Travel Taskforce Review
 - Testing – day 2 testing removed for fully vaxxed
- Staffing
- Group Welcome Charter
- Sustainability
- Keeping members informed on Government guidance & industry legislation



ADDITIONAL ADVOCACY ISSUES

- Visas
- APD
- VAT
- Labour shortages
- Removal of ID Cards
 - Collective passports
- Package Travel Regulations





QUESTIONS