



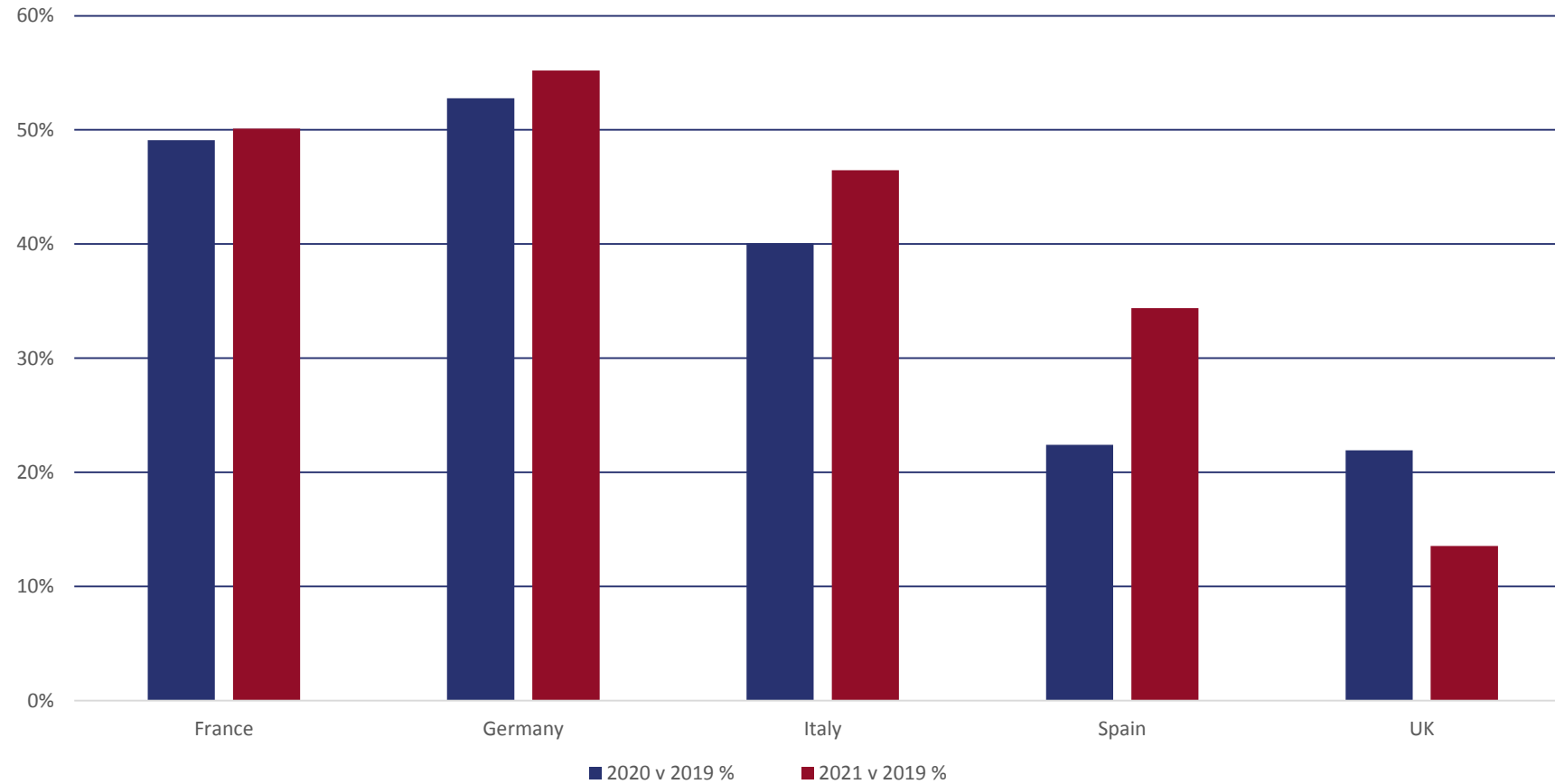
Recovery of the UK's Inbound Tourism Industry

Joss Croft, CEO, UKinbound

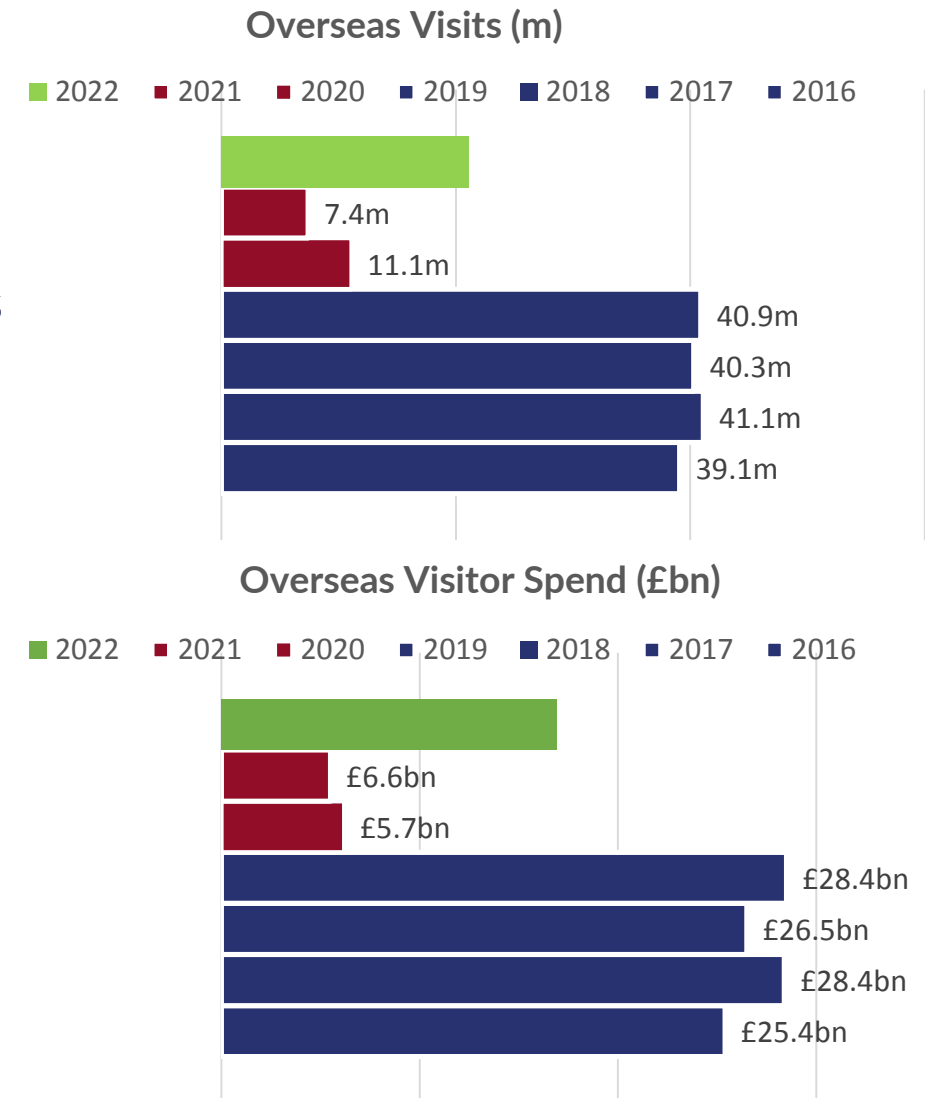
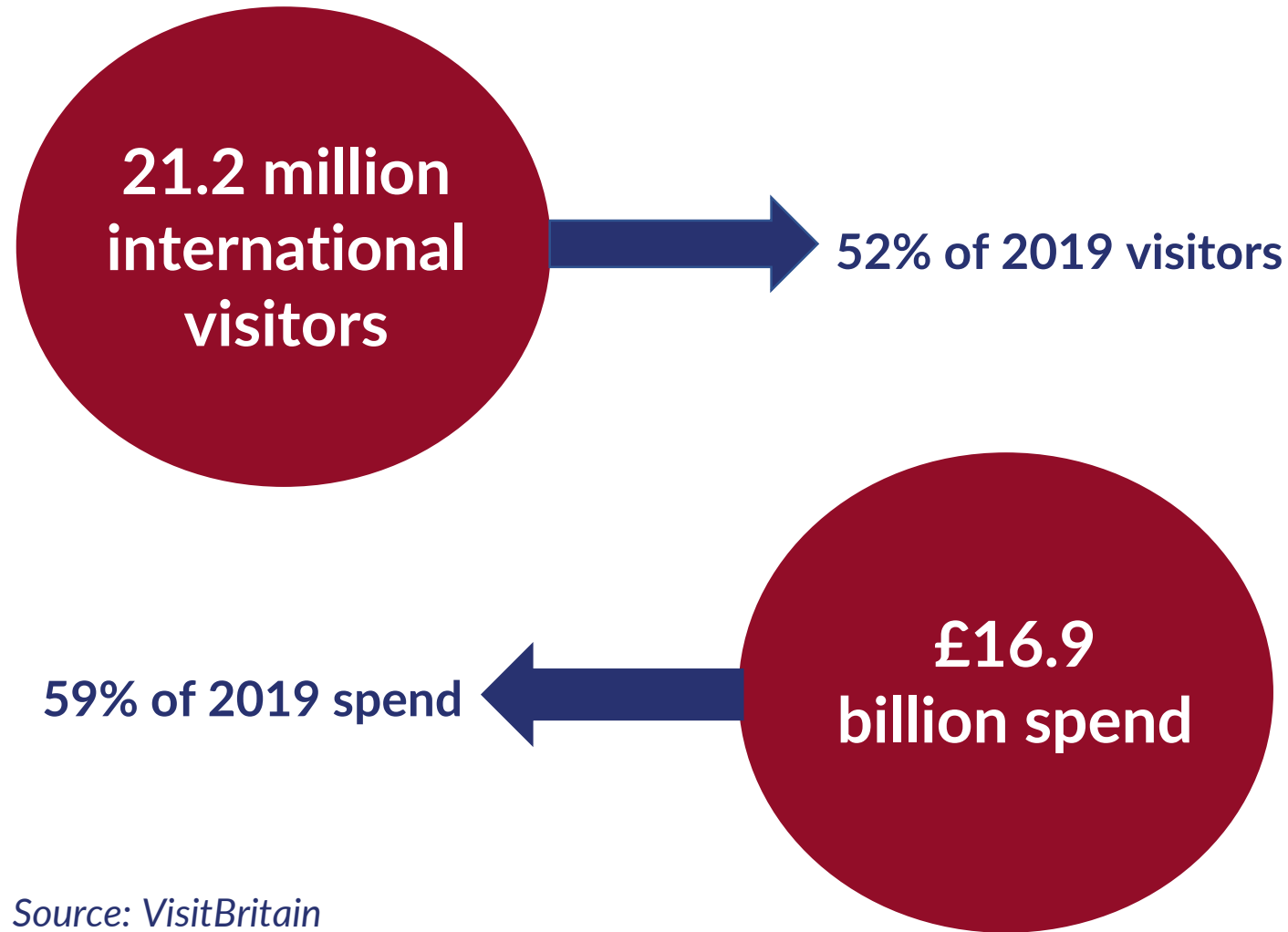
Thursday 16 June 2022



European Recovery – 2019 vs 2020 & 2021



RECOVERY



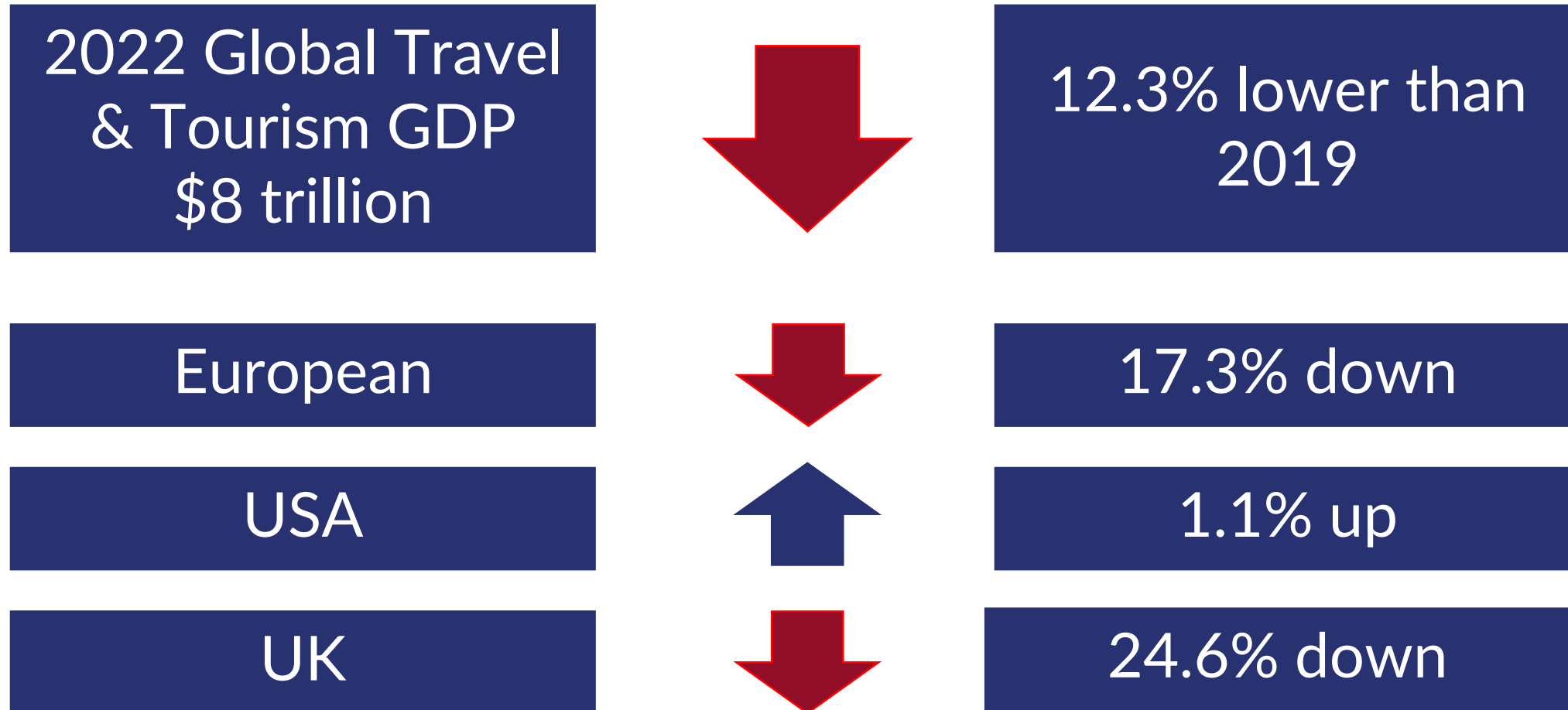
Source: VisitBritain
Last updated 16th February 2022

VisitBritain inbound forecast 2022



- Sharp fall in January visitors numbers
- Gradual pickup throughout 2022
- 50% pre-pandemic inbound visitors by summer
- 2/3 pre-pandemic visitor number by the end of 2022
- Europe and long haul markets (North American & Middle East) forecast to recover at a good pace
- Spend per visit to remain higher than the pre-pandemic norm
- Assuming no new variant

Competitor Analysis

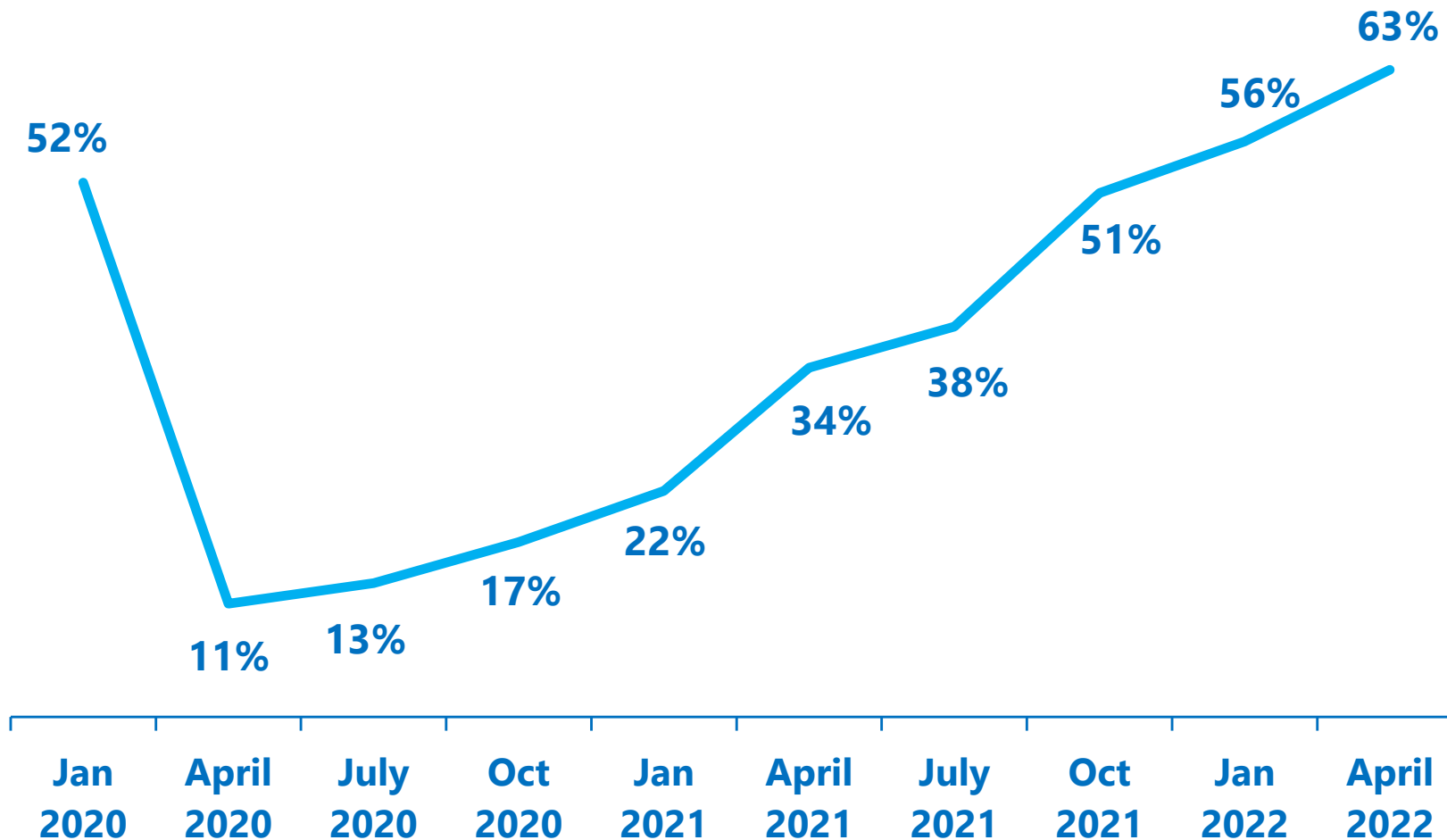


Source: World Travel and Tourism Council

UKinbound Business Barometer

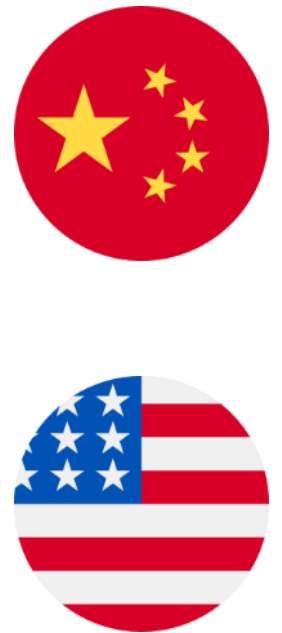
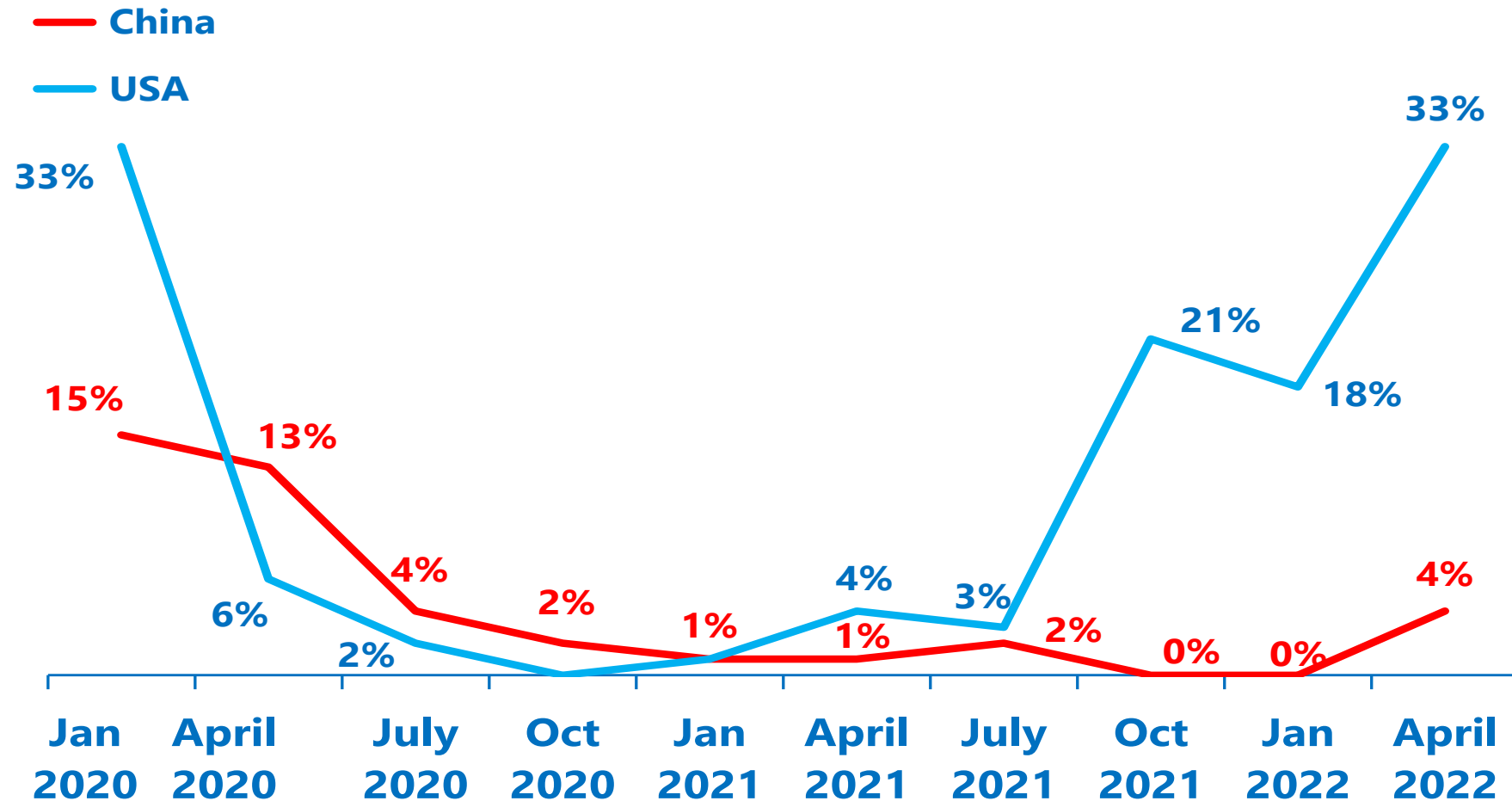


Q. Looking ahead to the next 12 months, how confident are you feeling about bookings / visitor revenues / customer orders?



UKinbound Business Barometer

Q. Select the main market that you are currently experiencing growth in.



Activators for an international leisure trip (SH)

The shift from *health-centric* to *money-centric* attitudes is accelerating with greater focus on money-back cancellation guarantees, attractive deals (ranked #2!) and insurance for COVID-19 travel. Expectations for a full and safe experience at destination grow, with stable sanitary and political environments and higher freedom of movement (removal of quarantine policies).

	Total	SH	Denmark	France	Germany	Rep. of Ireland	Italy	Neths.	Norway	Russia	Spain	Sweden
Money-back guarantee should I wish to cancel my trip	34%	41%	43%	40%	39%	42%	41%	37%	40%	41%	43%	48%
An attractive offer e.g. discounts on flights or accommodation	30%	33%	32%	29%	22%	37%	34%	24%	38%	43%	40%	34%
Removal of quarantine policies in destination country	30%	32%	37%	26%	34%	29%	26%	29%	37%	43%	31%	32%
A significant decrease in coronavirus cases at destination	29%	25%	21%	23%	26%	26%	32%	20%	23%	22%	29%	29%
Insurance for COVID-19 related travel changes/changes to regulations	25%	25%	28%	28%	16%	25%	28%	20%	23%	20%	27%	35%
Hygiene & safety protocols in place at destination	23%	19%	10%	16%	25%	27%	32%	17%	12%	12%	27%	7%
Stable political environment in destination country	23%	24%	20%	28%	30%	18%	25%	20%	22%	30%	28%	23%
Removal of quarantine policies in home country	23%	23%	14%	25%	26%	19%	21%	21%	30%	36%	22%	19%
A high proportion of the population being vaccinated in the destination country	20%	17%	17%	12%	16%	23%	19%	13%	20%	9%	16%	23%
Welcoming locals in destination country	19%	20%	19%	28%	21%	14%	17%	22%	29%	21%	18%	15%
Assurance that there will be a range of/enough things to do	17%	17%	16%	26%	25%	13%	15%	21%	8%	17%	23%	7%
Receiving a booster COVID-19 vaccination	16%	10%	7%	7%	16%	15%	8%	13%	6%	6%	12%	6%
Your Government's advice on international travel	16%	16%	17%	8%	12%	21%	13%	19%	28%	7%	11%	20%
Voucher-back guarantee should I wish to cancel my trip	15%	16%	18%	11%	11%	18%	26%	19%	8%	10%	25%	10%
The introduction of a vaccine passport	14%	11%	8%	12%	9%	12%	16%	8%	12%	4%	11%	13%
Official national hygiene label in accommodation and attractions in destination	12%	8%	6%	7%	9%	10%	9%	10%	6%	7%	7%	5%
Mandatory coronavirus testing at some point during the trip	11%	8%	4%	9%	10%	8%	13%	8%	5%	5%	9%	6%
Relaxation of visa requirements	7%	4%	N/A	N/A	N/A	N/A	N/A	N/A	N/A	40%	N/A	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)

Activators for an international leisure trip (LH)

LH markets still give priority to the pandemic control at destination (notably Asian markets), however, many markets are now determined by money-centric issues (Australians, Brazilians, North Americans and Gulf countries). Political stability is an important activator for China and Japan, while Visa requirements are key factors for Gulf markets.

	Total	LH	Australia	Brazil	Canada	China	India	Japan	Saudi Arabia	South Korea	UAE	USA
Money-back guarantee should I wish to cancel my trip	34%	27%	40%	38%	47%	13%	25%	25%	17%	23%	23%	32%
An attractive offer e.g. discounts on flights or accommodation	30%	28%	24%	44%	27%	19%	26%	25%	35%	25%	32%	28%
Removal of quarantine policies in destination country	30%	28%	32%	16%	35%	24%	27%	36%	28%	29%	28%	27%
A significant decrease in coronavirus cases at destination	29%	31%	28%	39%	31%	24%	29%	53%	24%	42%	27%	28%
Insurance for COVID-19 related travel changes/changes to regulations	25%	24%	37%	34%	37%	21%	28%	15%	13%	24%	20%	22%
Hygiene & safety protocols in place at destination	23%	27%	25%	33%	25%	28%	42%	19%	16%	32%	25%	27%
Stable political environment in destination country	23%	22%	12%	25%	19%	28%	20%	27%	22%	18%	23%	22%
Removal of quarantine policies in home country	23%	22%	26%	12%	29%	19%	22%	38%	17%	23%	22%	20%
A high proportion of the population being vaccinated in the destination country	20%	22%	22%	30%	29%	21%	23%	17%	15%	21%	18%	25%
Welcoming locals in destination country	19%	18%	12%	21%	12%	20%	20%	17%	20%	17%	22%	18%
Assurance that there will be a range of/enough things to do	17%	16%	8%	21%	10%	18%	19%	18%	17%	16%	18%	16%
Receiving a booster COVID-19 vaccination	16%	22%	17%	25%	15%	24%	28%	20%	26%	22%	22%	18%
Your Government's advice on international travel	16%	17%	22%	10%	18%	21%	25%	13%	14%	16%	14%	14%
Voucher-back guarantee should I wish to cancel my trip	15%	14%	13%	21%	14%	11%	13%	11%	16%	10%	17%	16%
The introduction of a vaccine passport	14%	16%	21%	25%	15%	12%	14%	19%	9%	18%	13%	18%
Official national hygiene label in accommodation and attractions in destination	12%	15%	10%	18%	7%	27%	21%	15%	12%	14%	12%	10%
Mandatory coronavirus testing at some point during the trip	11%	14%	15%	12%	11%	15%	19%	12%	14%	11%	16%	15%
Relaxation of visa requirements	7%	10%	N/A	N/A	N/A	14%	28%	N/A	32%	N/A	34%	N/A

Q20: What would make you more likely to travel internationally for leisure in the next 12 months? (Multiple Answers)
Base: All respondents (n = 11,057)

Challenges and Opportunities

Recruitment

Inflation

Visas

Sustainability

Means

Money

Motivation

Thank You

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