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UKINBOUND

THE VOICE OF INBOUND TOURISM

Visit Greenwich

Inbound update

22 April 2026



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2025 AWARDS FOR EXCELLENCE

DESTINATION OF THE YEAR

Agenda

01

UKinbound
update

02

Intermediaries

03

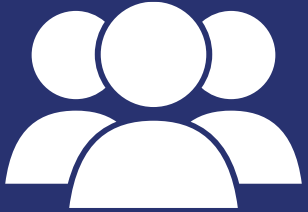
Geopolitics

04

Policy update

About UKinbound

The only trade association dedicated to the interests of UK's inbound tourism sector



500+ member businesses
13,000+ travel trade professionals



Representing all corners of the UK
and all sectors of the industry



What does UKinbound do?

- ✓ **PROVIDE** exclusive access to an extensive network of UK tourism industry contacts.
- ✓ **FACILITATE** networking, B2B and educational opportunities via our comprehensive events programme.
- ✓ **PROMOTE** member businesses through a range of marketing, showcase and exhibition opportunities.
- ✓ **INFORM** members of the latest industry insights and market intelligence.
- ✓ **REPRESENT** and champion members' interests and concerns to Government and the media.



WHAT IS INBOUND TOURISM?

KEY FACTS & FIGURES

- **7th** most visited country in the world
– 3rd for receipts
- **43.6 million** inbound visits spending **£33.4 billion** in 2024. 45.5m and **£35.7bn** in 2026 forecast.
- **2nd largest service export & 5th largest export sector** (bigger than pharma or gas & oil revenues)
- International visitors spend **2 times** as much as domestic

WHY IT MATTERS

- **New money** for the UK
- Supports **500,000+ jobs** across the nations & regions
- Key supporter of **local economies**
- Funds **product development**: attractions, theatre, culture, airlines etc.
- **Soft power** – links to trade, education & investment



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Intermediaries



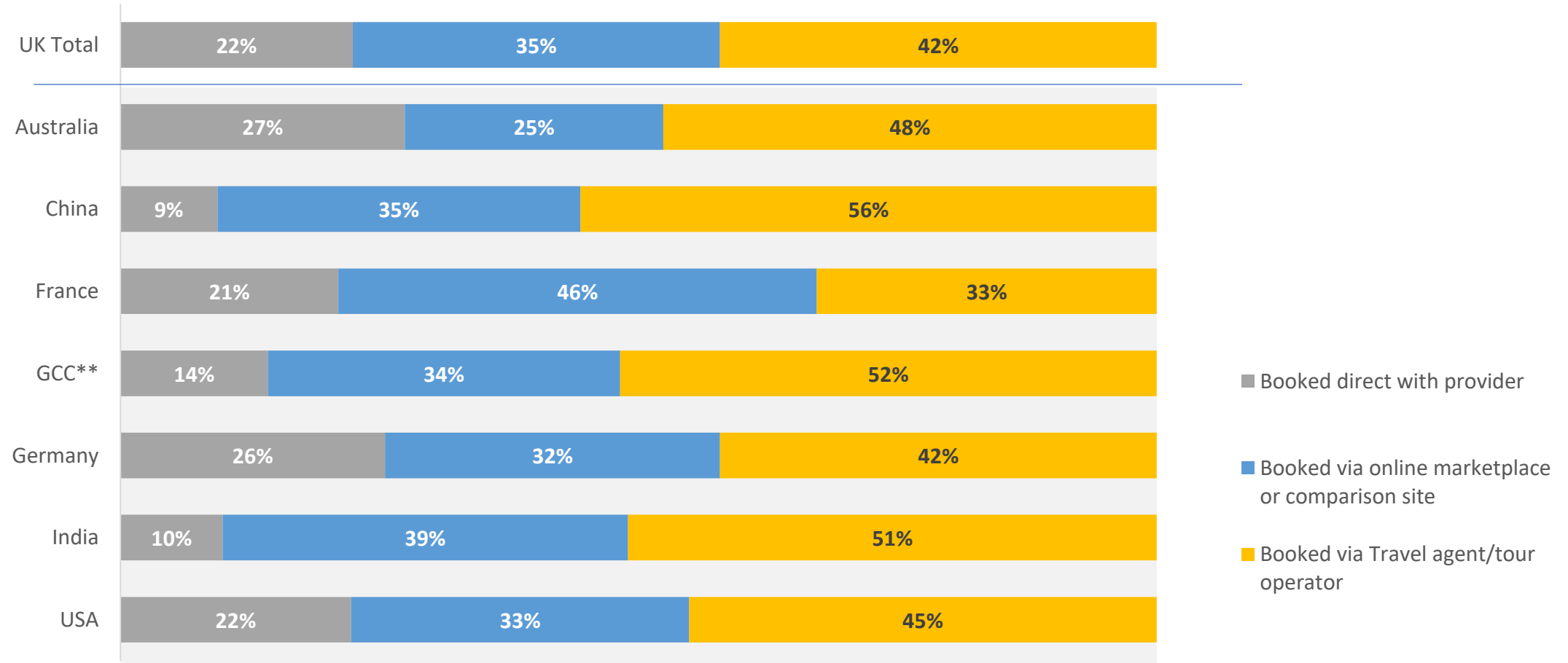
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Booking Habits to Britain amongst key inbound markets

Booking* a trip to Britain via booking channel - detailed



*includes all booking types; package bookings, all trip elements booked separately, some but not all elements booked together. ** includes Saudi Arabia and UAE

New UKinbound research on the role of intermediaries

UKinbound's intermediary members facilitated over 50% of all inbound holiday only visits to the UK in 2024 (over 20% of all inbound visits)

UKinbound's intermediary members are more likely to facilitate trips out of London for international visitors holidaying in the UK

- 44% of the trips coordinated by UKinbound intermediary member in 2024 were outside of London, compared to 38% of all the inbound holiday trips

In 2025, UKinbound suppliers members expect that 46% of their business will be generated through an intermediary. In 2024 this figure was 43%

UKinbound members, that deal directly with international visitors, spend £35.7 million annual on international marketing (includes staff costs)

WHY WORK WITH THE TRAVEL TRADE?

- ✓ Additional distribution channel and increased reach
- ✓ New markets
- ✓ Off-peak volume and revenue
- ✓ Knowledge of the international customer
- ✓ Marketing your products - £30m p.a. (net of staff costs)
- ✓ Loyalty – they are invested in your product and experiences
- ✓ Terms and conditions that work with you
- ✓ Not just order takers but providing inspiration and motivation
- ✓ Ground-handling expertise – product development – new partnerships
- ✓ Repeat business - loyalty
- ✓ Business growth - derisk



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Conflict in the Middle East



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Conflict in the Middle East: Snap Survey Update

- Wave 1: Survey launched Thursday 5 March and closed 9am Monday 9 March
- Wave 2: Survey launched Monday 16 March and closed 2pm Wednesday 18 March
- Wave 3: Survey launched Thursday 26 March and closed 2pm Tuesday 7 April

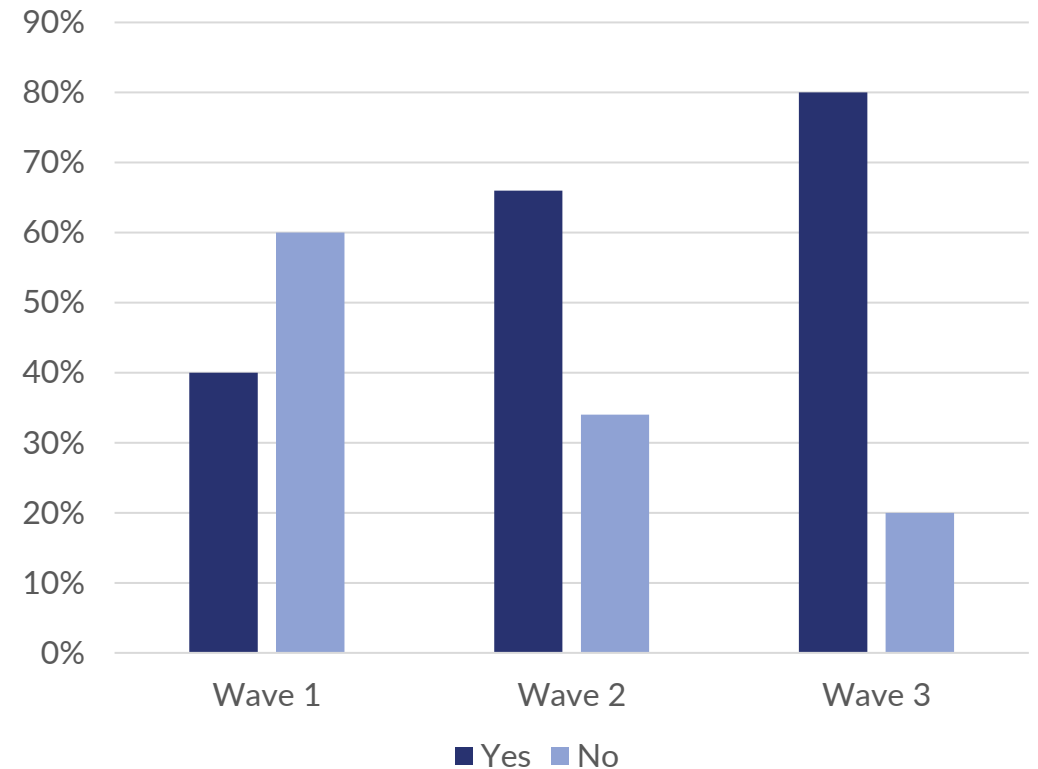
Across the three surveys, there is a clear escalation in the impact of the Middle East conflict on the UK's inbound visitor economy.

Wave 3 shows growing uncertainty:

- Businesses reporting slower enquiries
- Delayed decision-making; and
- Weaker booking conversion for April-early summer.

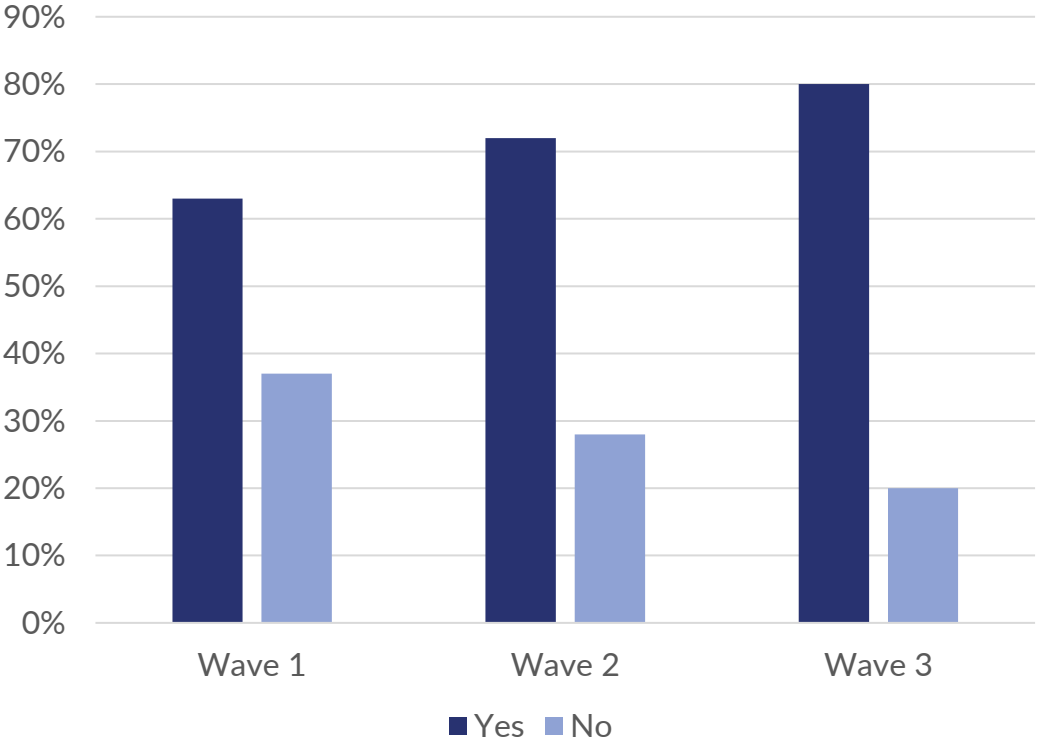
Disruption is being driven by rising fuel and flight-related costs, pressure on margins, and weakening traveller confidence, particularly impacting group travel and long-haul markets.

Has your business been impacted by the conflict in the Middle East since 28 February?

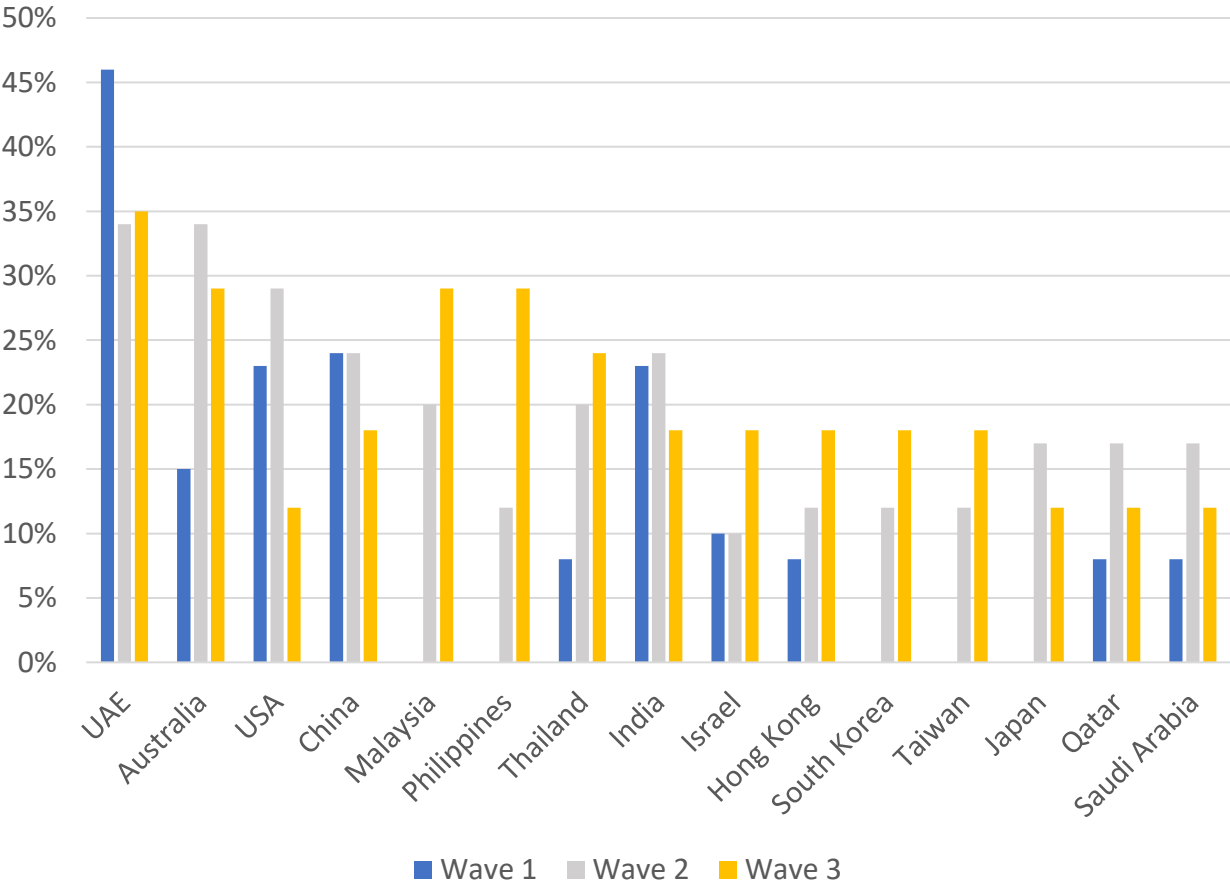


Conflict in the Middle East: Cancellations

Have you received any cancellations?



Which markets were the cancellations from?



Flight bookings to the UK for upcoming months

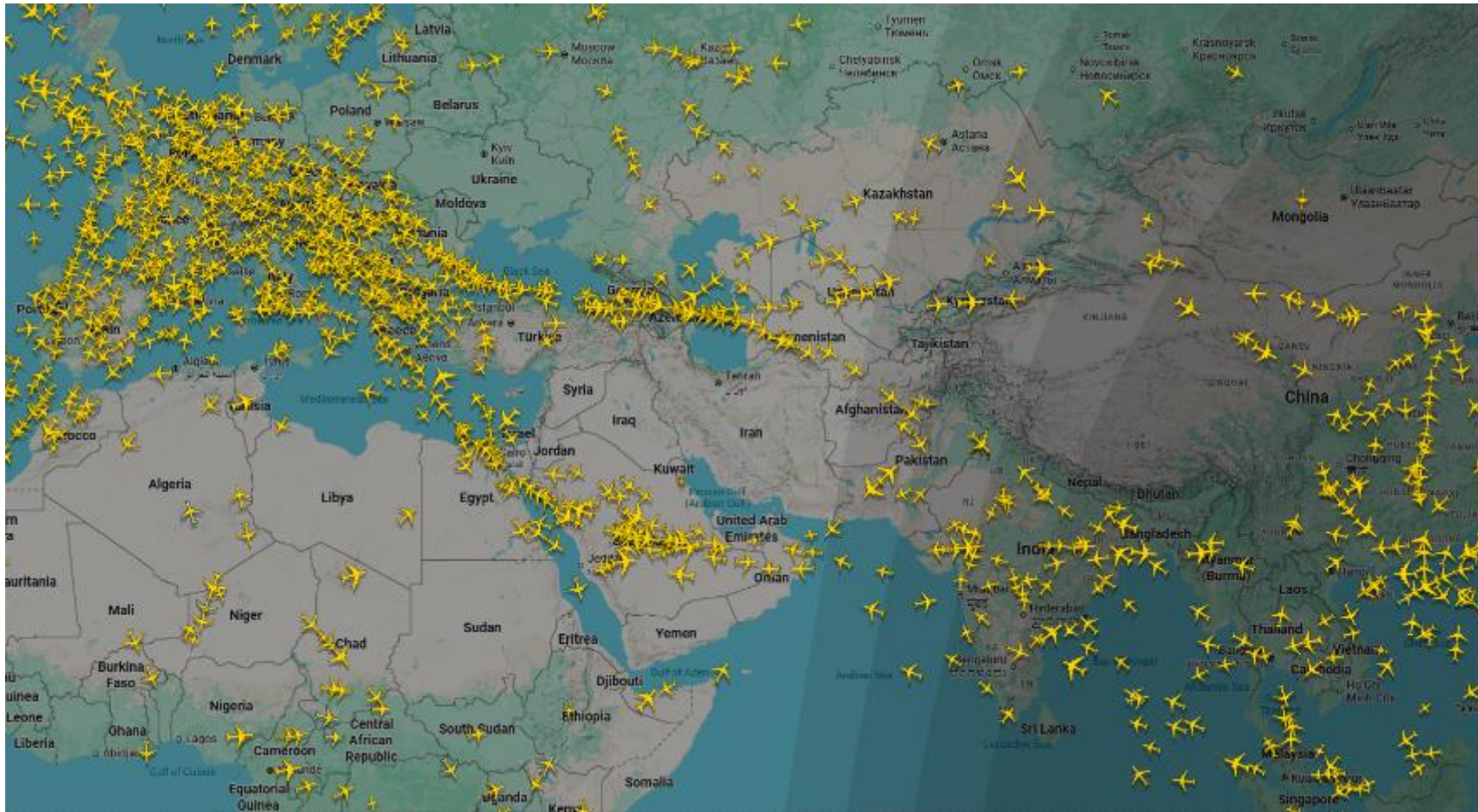
	Apr-2026 - Jun-2026
Subsaharan Africa	1%
South East Asia	4%
South Asia	-23%
North East Asia	22%
Middle East	-41%
Oceania	-12%
South America	-9%
North America	-5%
Northern Europe	-6%
Western Europe	-8%
Southern Europe	-7%
Eastern Europe	11%
Total Long Haul	-8%
Total Europe (excl. UK)	-6%
Total Inbound	-8%

- Overall, inbound flight bookings to the UK in the FK database for April-June are tracking 8% down on this time last year
- Middle East and South Asia showing heavy declines
- Europe and N America down slightly
- NE Asia tracking up
- Looking just at May gives a sense of the decline:
 - Bookings tracking 6% up YoY as of mid February
 - Bookings tracking 1% down YoY as of mid March
 - Bookings tracking 7% down YoY as of mid April

Source: Forward Keys Bookings to 5th April. % growth vs previous year shown. *Please note the low coverage of European markets in the ForwardKeys database.*

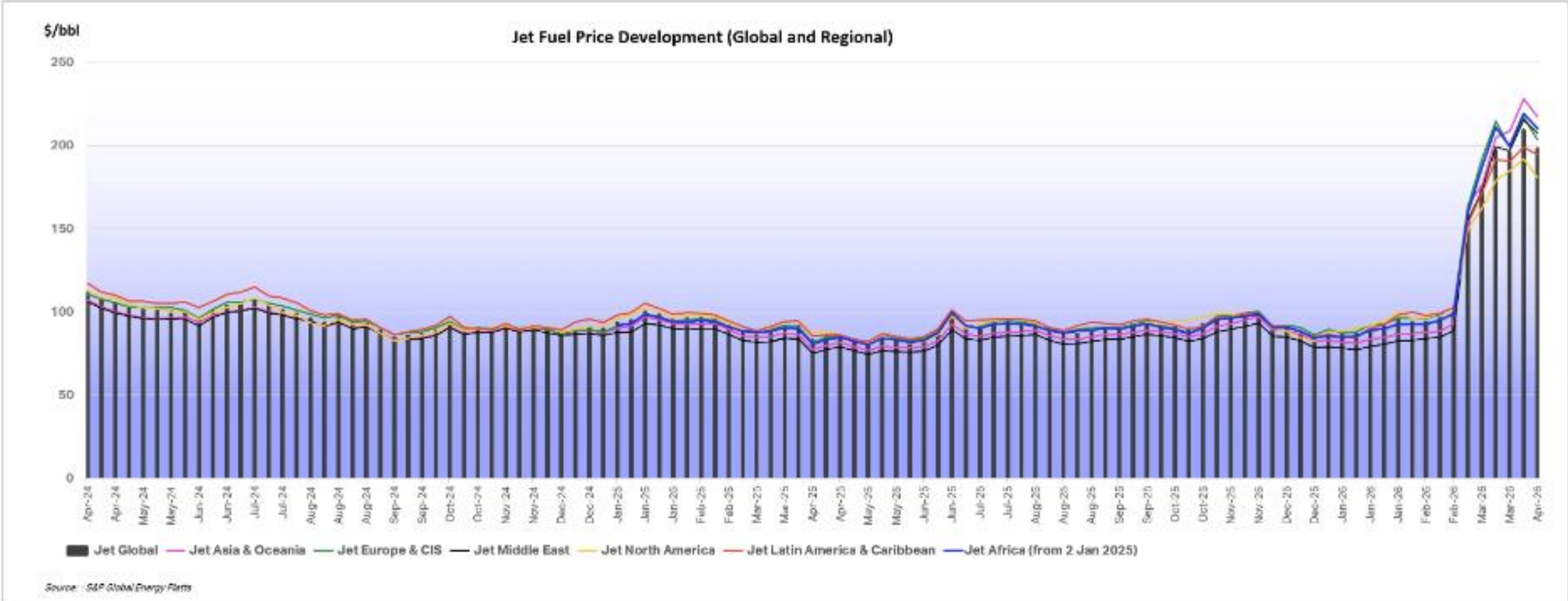
Flight path difficulties

Closure of Iranian and some Middle Eastern airspace impacts flight paths (on top of Russian airspace restrictions)



Substantial increase in jet fuel costs – more than the increase in the crude oil price

Jet fuel price 120% up year-on-year

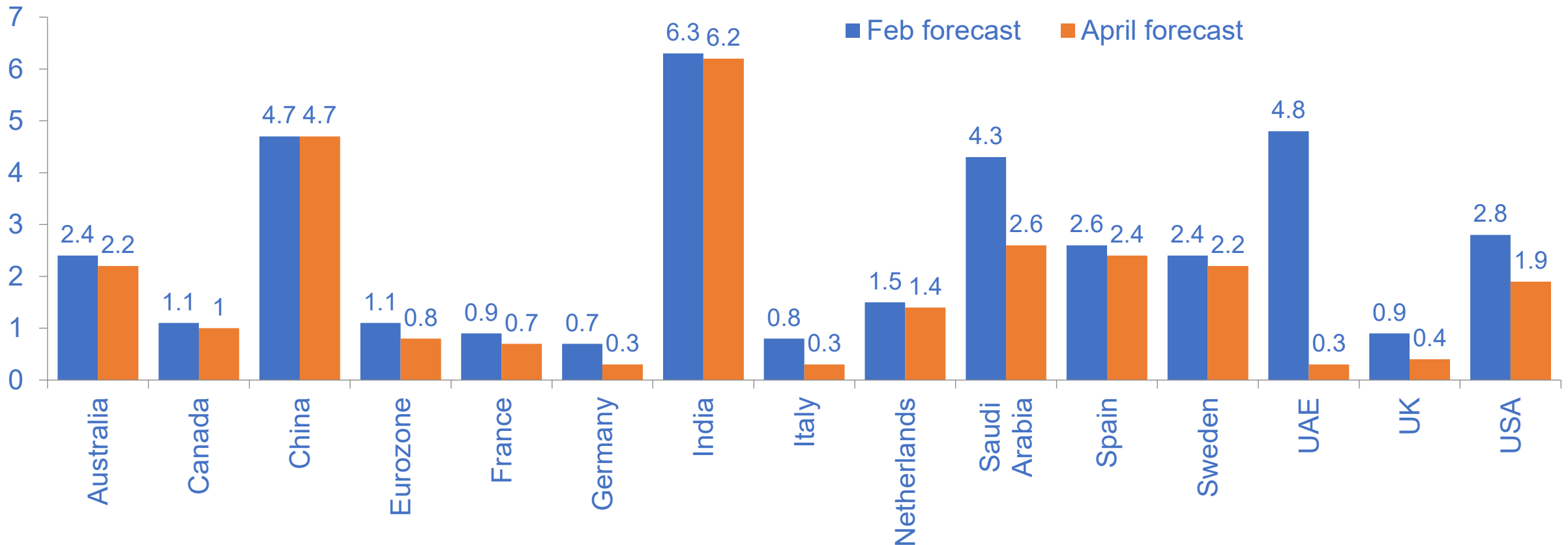


Source: S&P Global Energy Platts



Economic impact: substantial downgrade to forecasts for many, though not all, markets

GDP growth rate forecast for 2026





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Forecasts and actions to take



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Forecasts

Inbound forecasts

- VisitBritain's inbound forecast for 2026 (run in January) was growth in visits of 4% and growth in spend of 7% - this is now looking too high
- Oxford Economics have revised down their forecast: for visits from 5% to 2%, and spend from 8% to 6%
- GCC-to-UK 22% decline forecast by Oxford Economics in 2026 (vs 5% growth in previous forecast), but risks to the downside – this was based on data from three weeks ago

Iran impact:

- GCC (Gulf) markets worth an estimated £2.7bn in inbound tourism spending in 2025 – one in every £13 spent in the UK by visitors
- Disruption to Gulf airports has a wide impact on key markets. Around half of Australian and South East Asian visitors and almost a third of Indian visitors to the UK transit via a Gulf airport
- Oil price up from c.\$70 (and low of under \$60 in Dec/Jan) to \$95-\$110 – disproportionate pressure on air costs, and pushing up overall inflation

Competitive position:

- Arrivals to Western Europe forecast to grow 7% this year – Mediterranean destinations forecast to see strong growth
- UK has higher exposure to Middle East and Indian arrivals than most European competitors

Where we are now and what you might want to do

- ✓ Middle East is still very unstable - nothing immediately will go back to “normal”. But this is not Covid – it is not a crisis of demand; just where that demand goes.
- ✓ UK economy not showing signs of much growth
- ✓ Customers are nervous, and many are waiting for more certainty to book
- ✓ Cancellations and Refunds, especially if bookings come under the Package Travel Regulations
- ✓ Supply chain issues abound led by fuel prices, scarcity and logistics
- ✓ Review what steps you took during Covid
- ✓ Have contingency plans for different scenarios of revenue loss or cost increase
- ✓ Ensure you can fulfil your booking or operational commitments
- ✓ Be flexible and adapt your marketing to less affected markets – i.e. domestic market could be stronger
- ✓ Re-budget and examine your cash flow forecasts
- ✓ If you have bookings under the PTR’s, you need to refund in 14 days, or if you can arrange credits and deferrals



Policy priorities



POLICY PRIORITIES

- Restore VisitBritain's funding and unlock new funding via a new model that top-slices ETA and visa profits and allocates them to tourism promotion
- Ensure that any OVLs introduced are fair for all stakeholders; are simple and easy to manage with minimal business costs; take into account deterrence effect through an impact assessment; funding is directed to investment in the visitor economy
- Roll out the new Youth Experience Scheme, as agreed with the EU, as soon as possible
- Extend passport-free school group travel to additional European countries
- Enhance the UK's reputation as a welcoming destination by making the pre-and on-arrival process smoother, more efficient and friendly
- Improve the UK's competitiveness by encouraging return visitation via upselling a two-year visa
- Support the delivery of new direct flight routes into regional airports
- Review the impact of tax-free shopping – particularly the effect of extending the scheme to EU visitors



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