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Chairman's Report

The prize of a Tourism Sector Deal remains tantalisingly close.

I am delighted to present our 2018 Annual Report and my first as Chair of the Alliance. The political landscape in which our industry finds itself continues to be as turbulent as ever, meaning it is more important than ever that we support our members and the nearly 200,000 businesses they represent.

Brexit continues to dominate the political agenda and we have been lobbying hard to ensure that the interests of our sector are protected: an early deal on Aviation; assurance for EU migrant workers already in the UK and access to the skilled and motivated staff the industry needs in order to provide world-class service after Brexit, as well as sensible and frictionless border arrangements for EU tourists. With the future arrangements for EU migration uncertain, we have submitted evidence to the Migration Advisory Committee to ensure that we have an immigration policy which supports our industry's future growth.

The prize of a Sector Deal for Tourism under the Government's Industrial Strategy remains tantalisingly close and a lot of work has been undertaken by Tourism Alliance members in developing the bid document.

The importance of securing a sector deal, especially in relation to Skills, is highlighted by research by People 1st which concludes that the sector will need to recruit 1.3m new staff by 2024 due to growth and churn within the sector. Compounding this recruitment issue are demographic changes within the UK that mean that by 2022, there will be 700,000 fewer 16-24 year olds. For a sector where 44% of employees are under 30, this will have a significant impact on the ability of the sector to find new employees from within the UK. It is therefore extremely encouraging to see the industry come together to not only develop a strong programme of initiatives to resolve this problem but to find match funding from businesses to implement the programme.

Another important component of the Tourism Industry Bid is the development of Tourism Zones which will be key to achieving the Government's aim of spreading the benefits of tourism out from London and into the regions. Tourism Zones will also be very important providing a boost for struggling destinations and allowing strong destinations to take the next step in a post-Brexit environment. I believe that the Tourism Alliance has developed some strong principles which can be used as a starting point for developing the detail on how Tourism Zones will operate so that the benefits are maximised and the UK tourism industry can continue to provide growth and employment opportunities to both local economies and at the national level.

We are working hard with many Alliance colleagues, VisitBritain and DCMS to ensure that our case for a tourism sector deal is heard

throughout Government and look forward to receiving positive news soon so that we can take forward this initiative.

The work on developing and advocating for a tourism sector deal highlights to value of the Tourism Alliance in bringing together a very diverse industry in order to agree positions on a wide range of issues that face the industry so that Government has a very clear understanding of the actions needed to support its growth.

The Alliance continues to provide a platform to discuss the many challenges affecting our industry including regulation, employment, tourism taxes and the sharing economy. Whether it's the vexed question of the implementation of the Package Travel Directive, the future of destination funding or the challenges and opportunities of working in an increasingly digital world, our aim is to provide the space for debate within the industry and to lobby hard for the solutions which will help our sector continue to thrive. The importance of being able to do this during the uncertainty of Brexit cannot be overstated.

In this context, one of the developments that I was particularly pleased with this year was working with the Tourism Society and British Destinations to stage the first Annual Conference during English Tourism Week, which provided an excellent opportunity to debate many of these issues. It was great to see so many members attend this inaugural event and we look forward to the conference becoming a highlight in the tourism calendar.

Finally, my thanks to Kurt and Amanda who work so hard on your behalf and to you, the members, for all your support and for all that you do to make our industry the UK's fastest growing service industry. I look forward to working with you during what I am sure will be an exciting and challenging year ahead.

Deirdre Wells OBE
Chairman, Tourism Alliance



Director's Report

The Brexit Referendum has led the UK into uncharted political waters.

To say that the last two years have been particularly eventful is something of an understatement.

The Brexit Referendum on 23 June 2016 led the UK into uncharted political water and kicked-off an unprecedented level of political and governmental activity which has proved extremely difficult to predict.

In amongst this political turmoil Select Committees, Government Agencies and Departments have all been hard at work determining the impact of Brexit on areas under their responsibility, understanding what needs to be included in the Government's deal with the EU and developing the policies needed to help provide support in a post Brexit environment.

This uplift in activity has seen the Tourism Alliance provide written and oral evidence to the DCMS Select Committee inquiry on the impact of Brexit as well as to the House of Lords European Union Committee inquiry into Brexit: Options for Trade and the House of Lords Economic Affairs Committee inquiry on the Brexit and the Labour Market. What was particularly significant about giving evidence at these inquiries was the heightened recognition across parliament of the importance of tourism to the UK economy and the requirement to ensure that the needs of the sector are taken into account when a post-Brexit deal is negotiated with the European Union.

In addition to the Select Committee inquiries, the Tourism Alliance has also provided evidence to the Migration Advisory Committee for their work on understanding the importance of European nationals to the UK economy and advising the Government on future immigration policy. Although the Tourism Alliance had positive meets with officials, it is clear that more work needs to be undertaken to emphasise that the UK's future immigration strategy includes people with the language and soft skills needed by the tourism industry.

In a similar view, the Tourism Alliance provided evidence and met with officials from HM Treasury gathering evidence on the impact of APD and VAT on tourism to Northern Ireland as part of their work to fulfil the Government's agreement with the DUP. Although this work was concentrated on determining the impact of tourism taxes on Northern Ireland it is clear that officials were using this research as part of a wider review of taxation and there is hope that the findings will feed through into changes to future taxation policy.

In terms of inquiries, the Tourism Alliance has been supporting the Tourism APPG in undertaking an inquiry into the impact of the Sharing Economy

on UK tourism industry, the benefits that it provides and the issues that have arisen including the impact on local communities. The aim of the APPG is to determine how the benefits derived from this new business model can be maximised while any adverse impacts can be reduced.

The inquiry does, however, throw-up some difficult questions that the industry needs to address including whether there should be statutory registration for tourism accommodation and the role of tourism taxes in future funding models for tourism investment and development at the local level.

In addition to the high profile inquiries and calls for evidence, the Tourism Alliance has also provided submissions to a wide range of Government consultations over the past year ranging from the Apprenticeship Levy through to the Aviation Strategy, Landing Cards, OTAs and the Package Travel Directive.

On the Directive considerable work was undertaken researching the impact on the domestic tourism sector and lobbying for changes that focus the new regulations where customer protection is needed while freeing small businesses from unintended impacts. This work will continue as the Government has agreed to review the new legislation after six and twelve months and there is evidence that BEIS has gold-plated the European Directive.

As well as the policy work, the Tourism Alliance continued to hold well-attended policy briefing sessions with officials and round-table meetings with Ministers and Lords so that members could establish contacts and make sure their views are heard on a wide range of issues. We also worked with the Tourism Society and British Destinations to hold a very successful conference as part of English Tourism Week, after which the annual Parliamentary Reception hosted 36 MPs.

As always, I would like to thank the Chairman, Executive Board and members for their support and Amanda Fry for all their work behind the scenes in arranging events for members.

Kurt Janson
Director

Tourism Alliance Financial Report

The Tourism Alliance Limited (Company Limited by Guarantee)

Report for the Directors for the year ended 31 December 2017

The directors present their report with the financial statements of the company for the year ended 31 December 2017.

Directors

The directors shown below have held office during the whole of the period from 1 January 2017 to the date of this report.

P T Hampson
M B Hirst
R A Pritchard
B M Simmonds
G Verity
B Donoghue
T Jenkins
D Wells
A Handyside

Other changes in directors holding office are as follows:

U Ibrahim – resigned 1 January 2017
A Woodward – resigned 26 July 2017
A Climpson – resigned 26 July 2017
S D'Alfonso – resigned 26 July 2017
A Wardle – appointed 26 July 2017
P Wragg – appointed 26 July 2017
N Brook-Sykes – appointed 26 July 2017
K Nicholls – appointed 26 July 2017
N Lomas – appointed 26 July 2017

This report has been prepared in accordance with the provisions of Part 15 of the Companies Act 2006

relating to small companies.

ON BEHALF OF THE BOARD:



T Jenkins Director

23 July 2018

Tourism Alliance Financial Report

The Tourism Alliance Limited (Company Limited by Guarantee)

Income and Expenditure Account for the year ended 31 December 2017

	Notes	2017 £	2016 £
INCOME		82,338	88,416
Administrative expenses		(85,805)	(81,767)
OPERATING (DEFICIT) SURPLUS AND (DEFICIT) SURPLUS BEFORE TAXATION		(3,467)	6,649
Tax on surplus	3	–	–
(DEFICIT) SURPLUS FOR THE FINANCIAL YEAR		(3,467)	6,649

The Tourism Alliance Limited (Company Limited by Guarantee)

Balance Sheet as at 31 December 2017

Company registration Number 05106422

	Notes	2017 £	2016 £
CURRENT ASSETS			
Debtors	4	5,294	5,297
Cash at bank		31,030	46,088
CREDITORS		36,324	51,385
Amounts falling due within one year	5	(7,937)	(19,531)
NET CURRENT ASSETS		28,387	31,854
TOTAL ASSETS LESS CURRENT LIABILITIES		28,387	31,854
RESERVES			
Income and expenditure account		28,387	31,854
		28,387	31,854

The company is entitled to exemption from audit under Section 477 of the Companies Act 2006 for the year ended 31 December 2017.

The members have not required the company to obtain an audit of its financial statements for the year ended 31 December 2017 in accordance with Section 476 of the Companies Act 2006.

The directors acknowledge their responsibilities for:

- ensuring that the company keeps accounting records which comply with Sections 386 and 387 of the Companies Act 2006 and
- preparing financial statements which give a true and fair view of the state of affairs of the company as at the end of each financial year and of its surplus or deficit for each financial year in accordance with the requirements of Sections 394 and 395 and which otherwise comply with the requirements of the Companies Act 2006 relating to financial statements, so far as applicable to the company.

The financial statements have been prepared in accordance with the provisions of Part 15 of the Companies Act 2006 relating to small companies.

The financial statements were approved by the Board of Directors on 23 July 2018 and were signed on its behalf by:

T Jenkins Director

Tourism Alliance Financial Report

The Tourism Alliance Limited (Company Limited by Guarantee)

Notes to the Financial Statements for the year ended 31 December 2017

1 STATUTORY INFORMATION

The Tourism Alliance Limited is a private company, limited by guarantee, registered in England and Wales. The company's registered number and registered office address can be found on the Company Information page.

The presentation currency of the financial statements is the Pound Sterling (£).

The financial statements present information about the company as a single entity.

2 ACCOUNTING POLICIES

Basis of preparing the financial statements

These financial statements have been prepared in accordance with the provisions of Section 1A "Small Entities" of Financial Reporting Standard 102 "The Financial Reporting Standard applicable in the UK and Republic of Ireland" and the Companies Act 2006. The financial statements have been prepared under the historical cost convention.

Turnover

Turnover represents the net invoiced value of goods and services supplied by the company, net of value added tax and trade discounts.

Financial instruments

The company only enters into basic financial instruments transactions that result in the recognition of financial assets and liabilities like other debtors and creditors. Financial assets and liabilities are recognised when the company becomes a party to the contractual provisions of the instruments.

Debtors and creditors

Basic financial assets and liabilities, including other debtors and creditors, are initially recognised at transaction price, unless the arrangement constitutes a financing transaction, where the transaction is measured at the present value of the future receipts discounted at a market rate of interest. Such assets and liabilities are subsequently carried at amortised cost using the effective interest method, less any impairment.

Cash and cash equivalents

Cash and cash equivalents are represented by cash in hand and at bank.

Going concern

The directors consider that there are no material uncertainties about the company's ability to continue as a going concern. In forming their opinion, the directors have considered a period of one year from the date of signing the financial statements.

3 TAXATION

Analysis of the tax charge

No liability to UK corporation tax arose for the year ended 31 December 2017 nor for the year ended 31 December 2016.

The Tourism Alliance Limited operates as a Trade Association and only pays corporation tax on bank interest received.

Tourism Alliance Financial Report

The Tourism Alliance Limited (Company Limited by Guarantee)

Notes to the Financial Statements for the year ended 31 December 2017

4 DEBTORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2017	2016
	£	£
Other debtors	4,850	4,721
Prepayments and accrued income	444	576
	5,294	5,297

5 CREDITORS: AMOUNTS FALLING DUE WITHIN ONE YEAR

	2017	2016
	£	£
Trade creditors	-	17,345
Accruals and deferred income	7,937	1,630
Other creditors	-	556
	7,937	19,531

6 SHARE CAPITAL

The Association is a company limited by guarantee having no issued share capital, the liability of each member is limited to £1 each in the event of winding up.

7 RELATED PARTY DISCLOSURES

There were no related party transactions during the year, which are required to be reported under FRS102.

Tourism Alliance Financial Report

The Tourism Alliance Limited (Company Limited by Guarantee)
Chartered Accountants' Report to the Board of Directors
on the Unaudited Financial Statements of The Tourism Alliance Limited

In order to assist you to fulfil your duties under the Companies Act 2006, we have prepared for your approval the financial statements of The Tourism Alliance Limited for the year ended 31 December 2017 which comprise the Income and expenditure account, Other Comprehensive Income, Balance Sheet, and the related notes from the company's accounting records and from information and explanations you have given us.

As a practising member firm of the Institute of Chartered Accountants in England and Wales (ICAEW), we are subject to its ethical and other professional requirements which are detailed within the ICAEW's regulations and guidance at <http://www.icaew.com/en/membership/regulations-standards-and-guidance>.

This report is made solely to the Board of Directors of The Tourism Alliance Limited, as a body, in accordance with our terms of engagement. Our work has been undertaken solely to prepare for your approval the financial statements of The Tourism Alliance Limited and state those matters that we have agreed to state to the Board of Directors of The Tourism Alliance Limited, as a body, in this report in accordance with ICAEW Technical Release 07/16AAF. To the fullest extent permitted by law, we do not accept or assume responsibility to anyone other than The Tourism Alliance Limited and its Board of Directors, as a body, for our work or for this report.

It is your duty to ensure that The Tourism Alliance Limited has kept adequate accounting records and to prepare statutory financial statements that give a true and fair view of the assets, liabilities, financial position and loss of The Tourism Alliance Limited. You consider that The Tourism Alliance Limited is exempt from the statutory audit requirement for the year.

We have not been instructed to carry out an audit or a review of the financial statements of The Tourism Alliance Limited. For this reason, we have not verified the accuracy or completeness of the accounting records or information and explanations you have given to us and we do not, therefore, express any opinion on the statutory financial statements.

Sawin & Edwards

Chartered Accountants

52 Kingsway Place
Sans Walk
London
EC1R 0LU

23 July 2018

The Tourism Alliance

The Tourism Alliance is the Voice of the Tourism Industry, comprising 52 Tourism Industry Organisations that together represent some 200,000 businesses of all sizes throughout the UK.

The purpose of the Tourism Alliance is to identify and develop policies and strategies to raise standards and promote quality within the industry and work with and lobby government on all key issues relevant to the growth and development of tourism, to maximise its contribution to the economy.

The Tourism Alliance was established in 2001 with the support of the Secretary of State for Culture, Media and Sport.

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Members

ABTA - The Travel Association
Airport Operators Association
AIPO
ALVA
ANTOR
Association of Group Travel Organisers
ASAP
ATHE
BACTA
BALPPA
Bed & Breakfast Association
British Beer & Pub Association
British Destinations
British Educational Travel Association
British Holiday & Home Parks Association
British Marine Federation
Business Visits & Events Partnership
Camping & Caravanning Club
Caravan and Motorhome Club
Churches Visitor and Tourism Association
Coach Tourism Association
Confederation of Passenger Transport
Country Land and Business Association
Cumbria Tourism
English UK
European Holiday Home Association
European Tour Operators Association
Family Holiday Association
Go New Forest
Group Travel Business Forum
Heritage Railway Association
Historic Houses
Holiday Home Association
Institute of Tourist Guiding
Liverpool City Region LEP
Marketing Manchester
National Caravan Council
National Coastal Tourism Academy
National Trust
Outdoor Industries Association
PASC
Premier Cottages
Resort Development Organisation
South West Tourism Alliance
The Tourism Society
Tourism For All
Tourism Management Institute
Tourism South East
UKHospitality
UKInbound
Visit Brighton
Visit Cornwall
Visit Greenwich
Visit Kent
Visit Wiltshire
Wine and Spirit Association

Observers

Local Government Association
VisitBritain
VisitEngland