



UKINBOUND
THE VOICE OF INBOUND TOURISM

SPRING GENERAL MEETING

16 May 2022

VISIT
GLOUCESTER

WELCOME

James Aitken
Chairman

AGENDA

1. Minutes Review – Rob Way, Board Director
2. CEO Update – Joss Croft, CEO
3. Annual Membership Survey – Richard Bryan, Qa Research
4. Destination Update – Steve Gardner-Collins & Rebecca Clay, Visit Gloucestershire
5. Q&A
6. Any Other Business

REVIEW OF MINUTES

Rob Way
Board Director

CEO UPDATE

Joss Croft
Chief Executive

WHAT HAVE WE BEEN UP TO? MEMBERSHIP



Stasher



CRIEFF HYDRO
FAMILY OF HOTELS



THE UNIVERSITY of EDINBURGH
Hospitality & Events Collection



WHAT HAVE WE BEEN UP TO? MEMBERSHIP



WHAT HAVE WE BEEN UP TO? **EVENTS**



WHAT HAVE WE BEEN UP TO? **EVENTS**



WHAT HAVE WE BEEN UP TO? **ADVOCACY**

- Promotion of Britain Abroad Inquiry
- UK Covid-19 inquiry
- Tourism Industry Council
- Global Travel Alliance
- APPG Future of Aviation



WHAT HAVE WE BEEN UP TO? MEDIA

Evening Standard



INDEPENDENT



“The ending of all UK travel restrictions has given international consumers the confidence to begin travelling here again”

“The ending of all UK travel restrictions has given international consumers the confidence to begin travelling here again”

Glasgow Times

Joss Croft, UKinbound



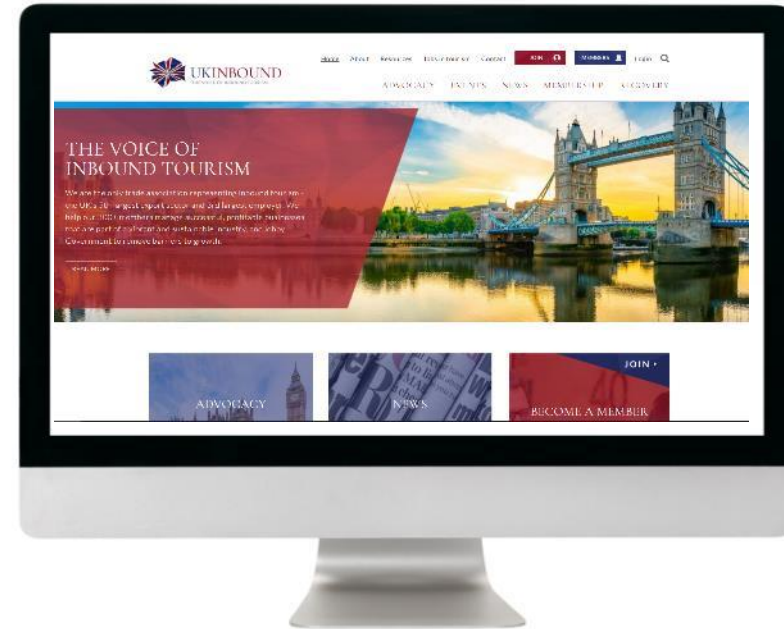
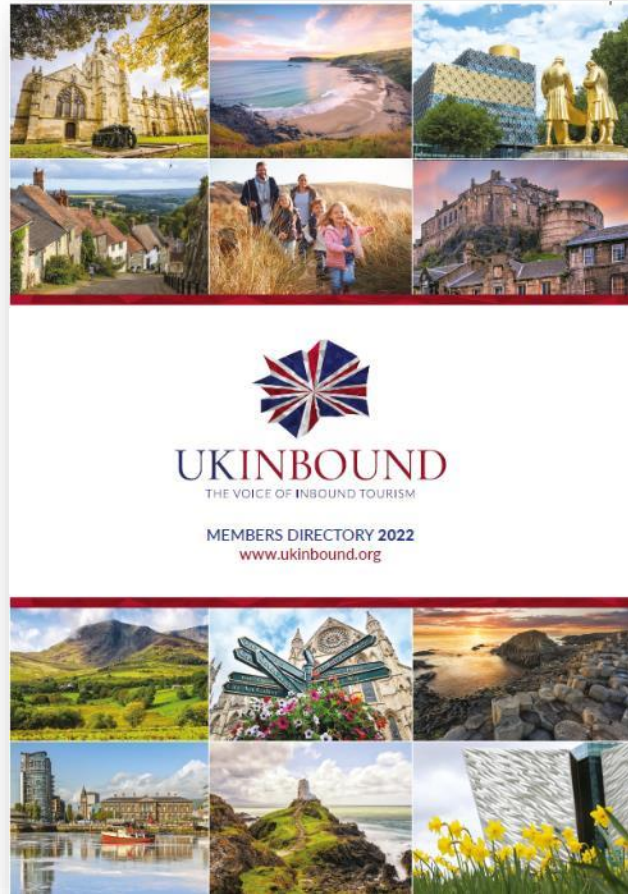
Trade association UKinbound, which represents more than 300 businesses dealing with tourists visiting the UK, said 39% of its members are reporting that international bookings and visitor numbers for between April and June are expected to be the same or higher than pre-pandemic.

WalesOnline

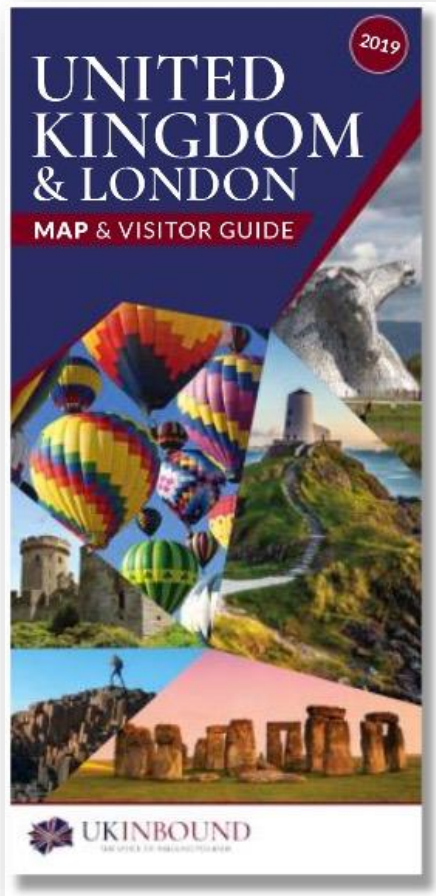
Belfast Telegraph

Mail Online

WHAT HAVE WE BEEN UP TO? MARCOMMS



WHAT HAVE WE BEEN UP TO? MARCOMMS



WHAT HAVE WE BEEN UP TO?



WHAT'S NEXT?

- Shadow Tourism Minister
- Tourism Industry Council
- Annual Convention, 28 – 29 September
- World Travel Market, 7 – 9 November





QUESTIONS



ANY OTHER BUSINESS



Membership Satisfaction Survey 2021-22

May 2022

Key findings

Richard Bryan, Managing Director

Qa Research
Merchant House,
11a Piccadilly, York, YO1 9WB
01904 632039 www.qaresearch.co.uk



UKINBOUND
THE VOICE OF INBOUND TOURISM

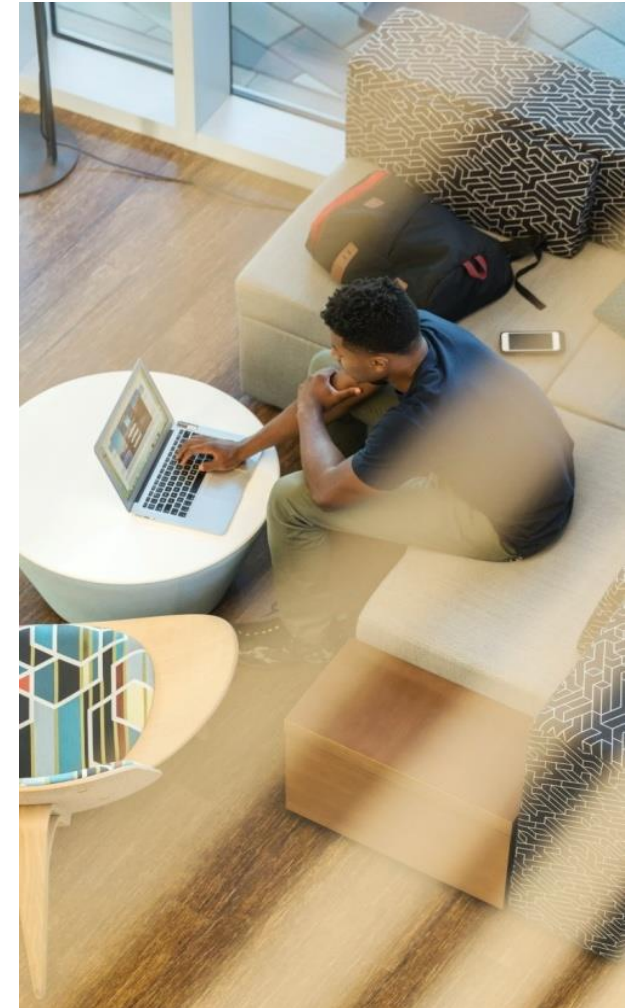


RESEARCH

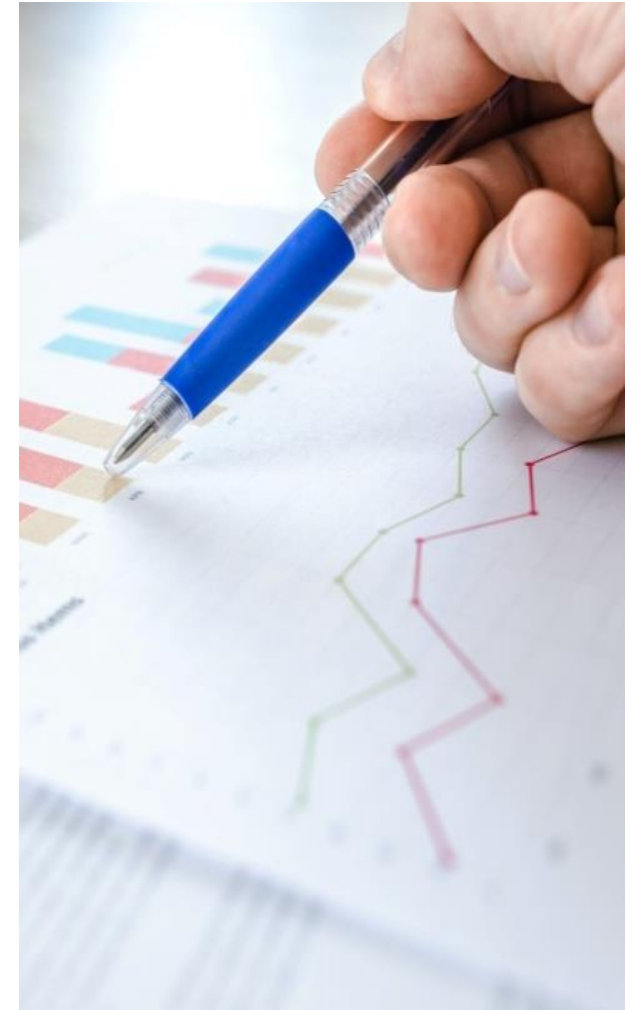
Aims & method

- **Survey of members:** chance to have a say on UKinbound membership
- **Main aims:**
 - Investigate views towards membership services & impact
 - Help UKinbound team understand members' satisfaction
 - Learn make improvements / changes to services
- **Online survey:** sent to members in February and March 2022
- **Looking back on the last year:** Members were asked to think about their experiences from last 12 months rather than the membership year
- **Good response from members:** 84 members completed the survey, 29% of the membership base

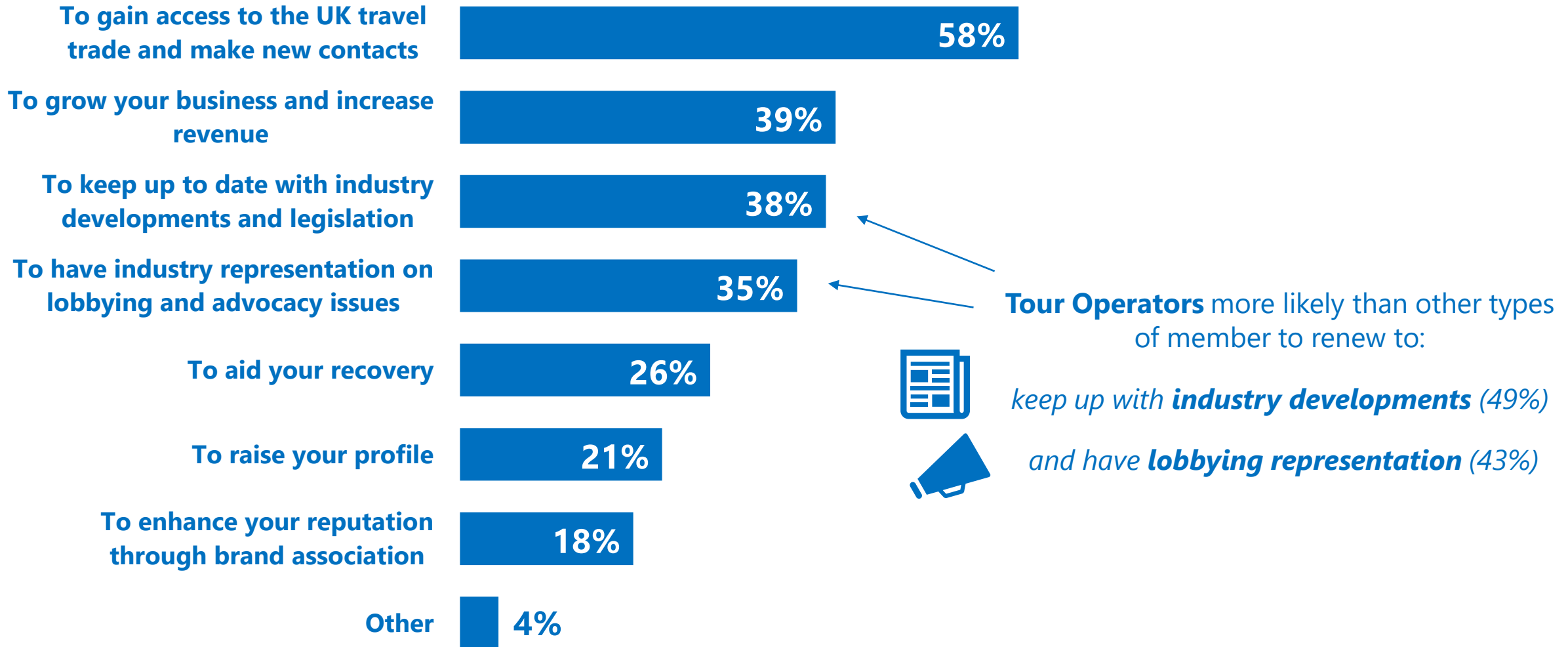
Many thanks for taking part!



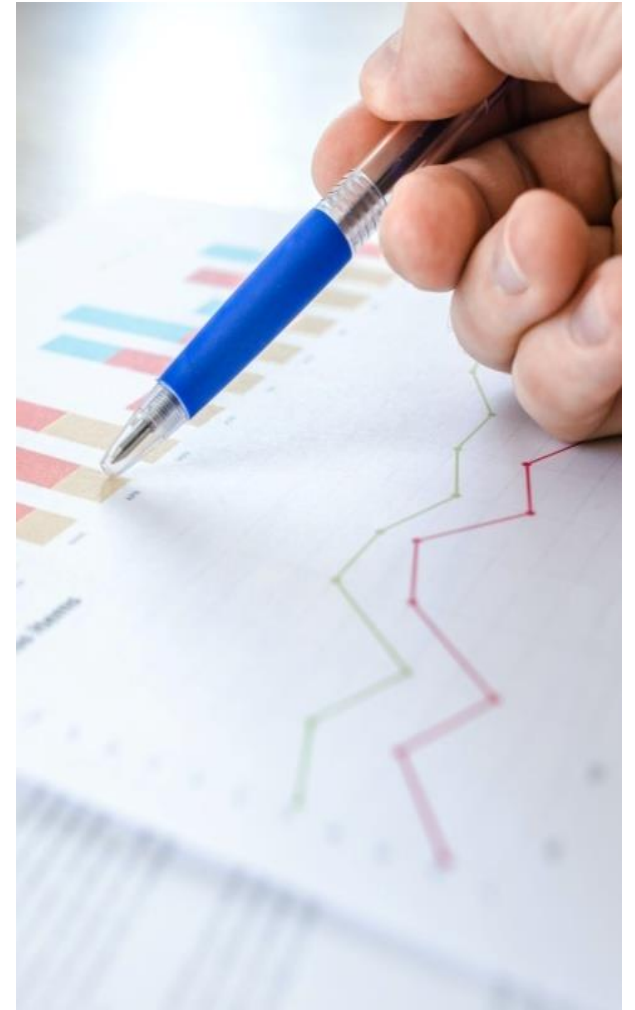
Key findings



Networking was the main reason for renewing membership



Events

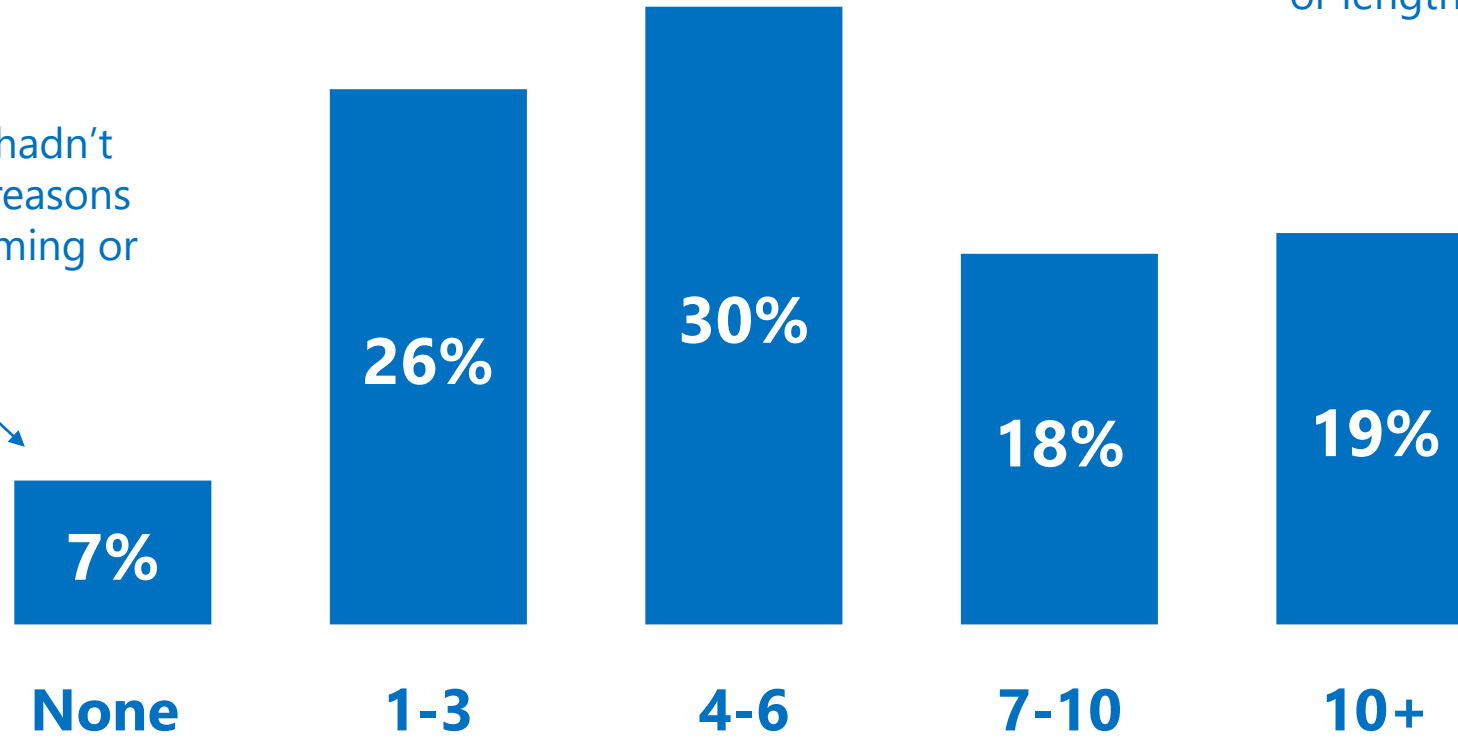


Varied spread of attendance at events over the year

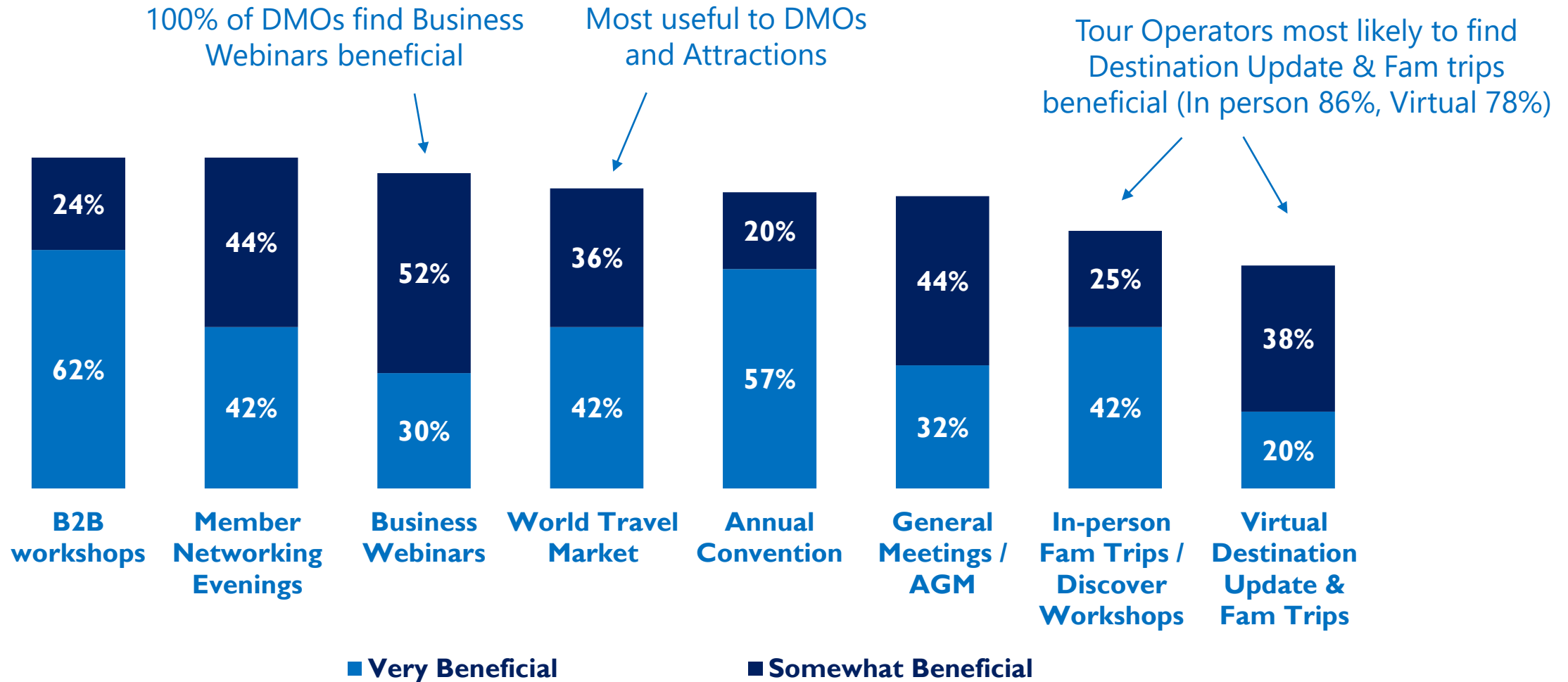
Mixture of face-to-face and virtual events in 2021/2022

No significant differences in event attendance based on type of member or length of membership

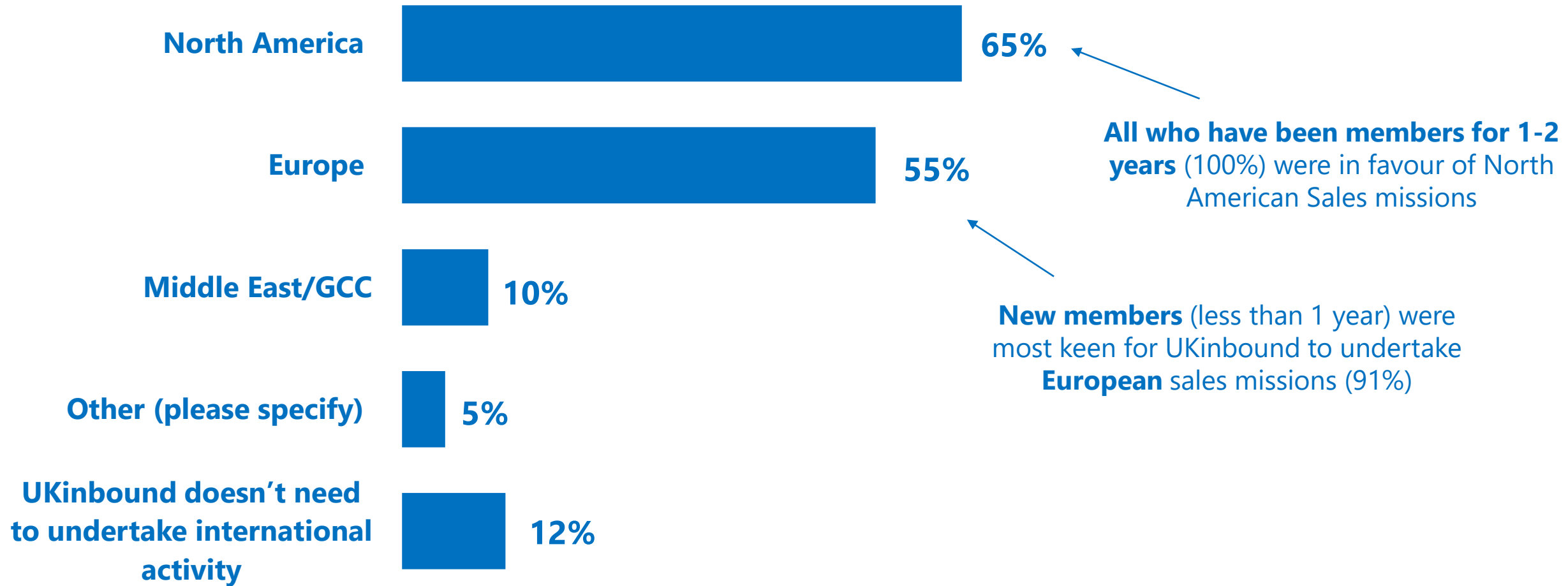
Of the few members who hadn't attended events, the main reasons were either 'inconvenient timing or length' or 'unaware'



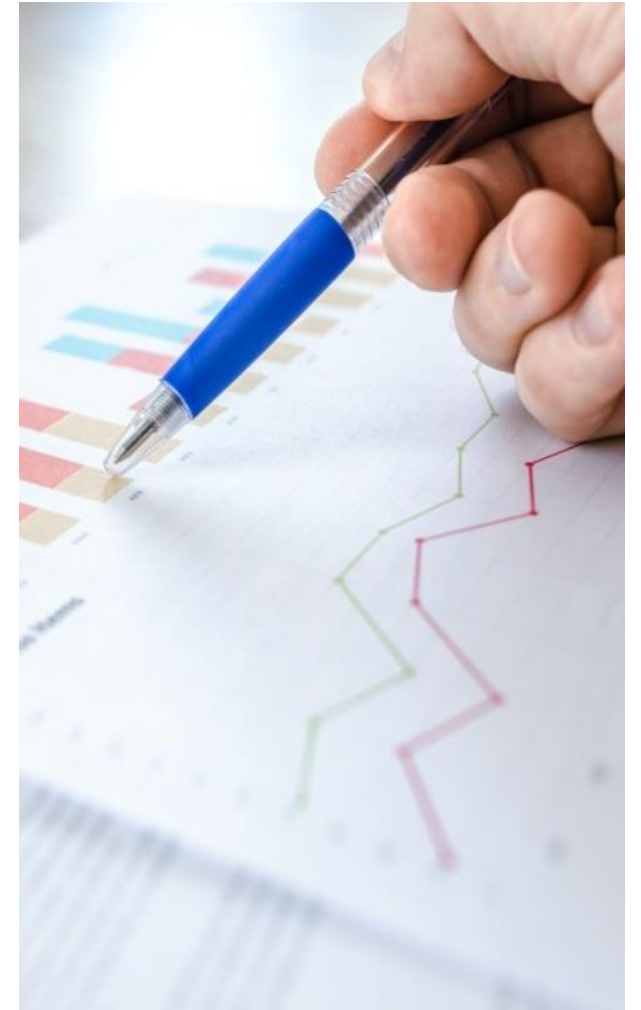
B2B workshops and networking evenings seen as most beneficial



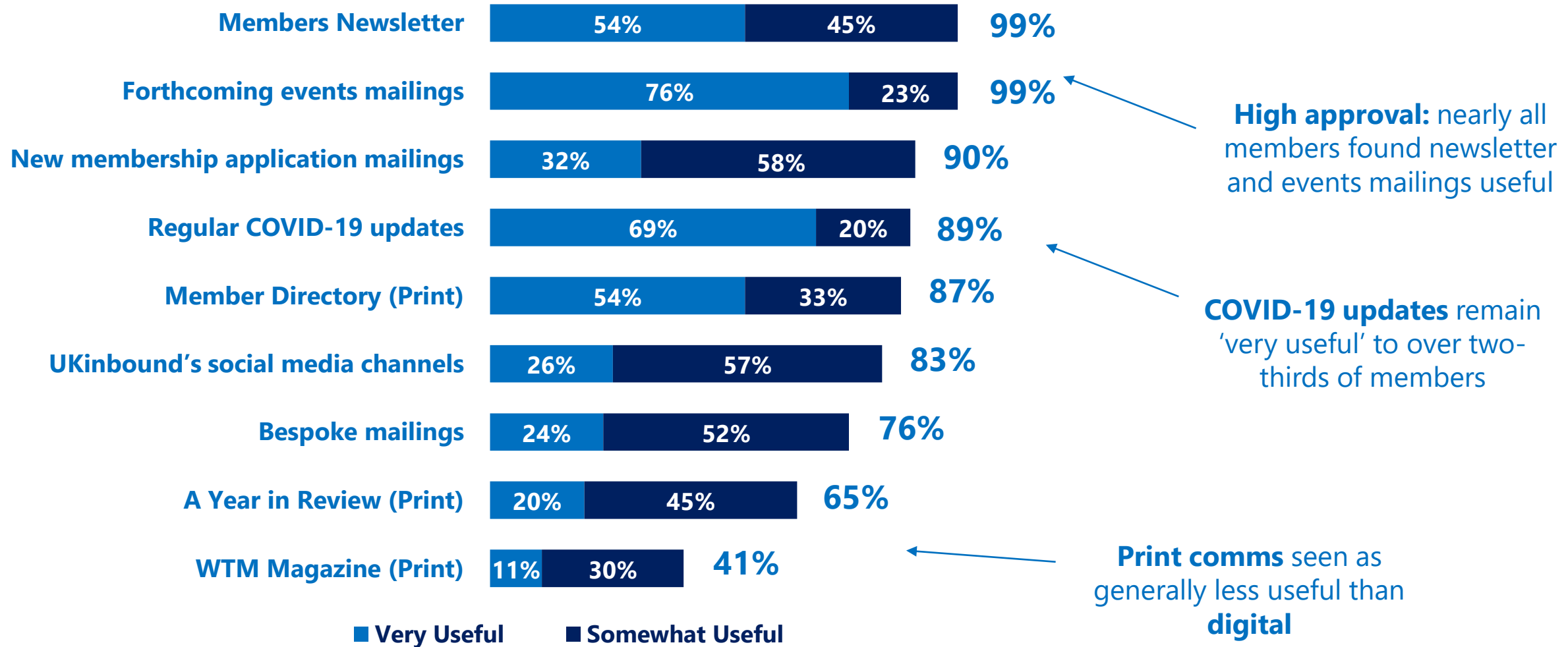
Strong support for North American and European sales missions



Public Affairs & Communications



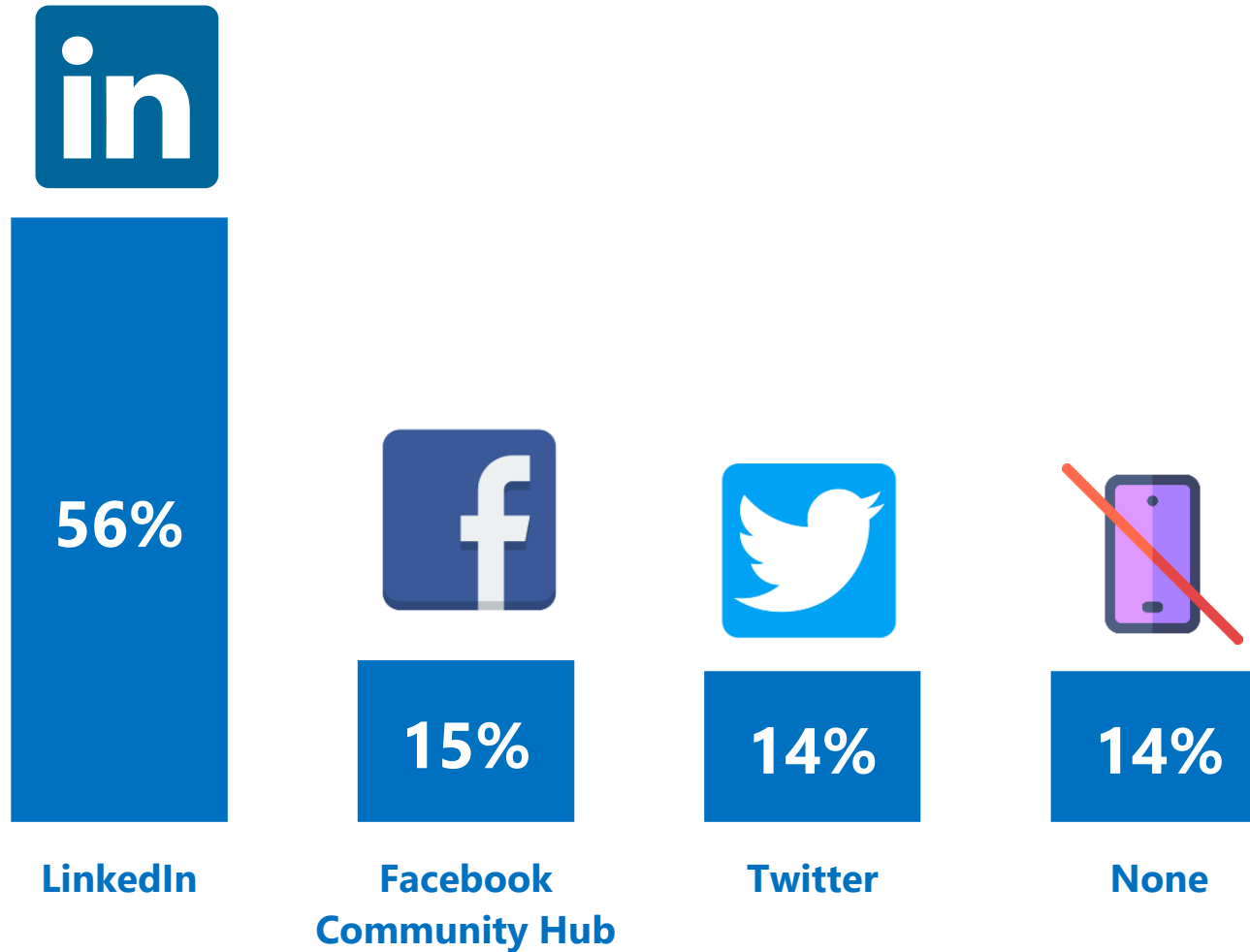
Member news and events are the most useful communications



Q10. How useful do you find the following digital communications? Base 84

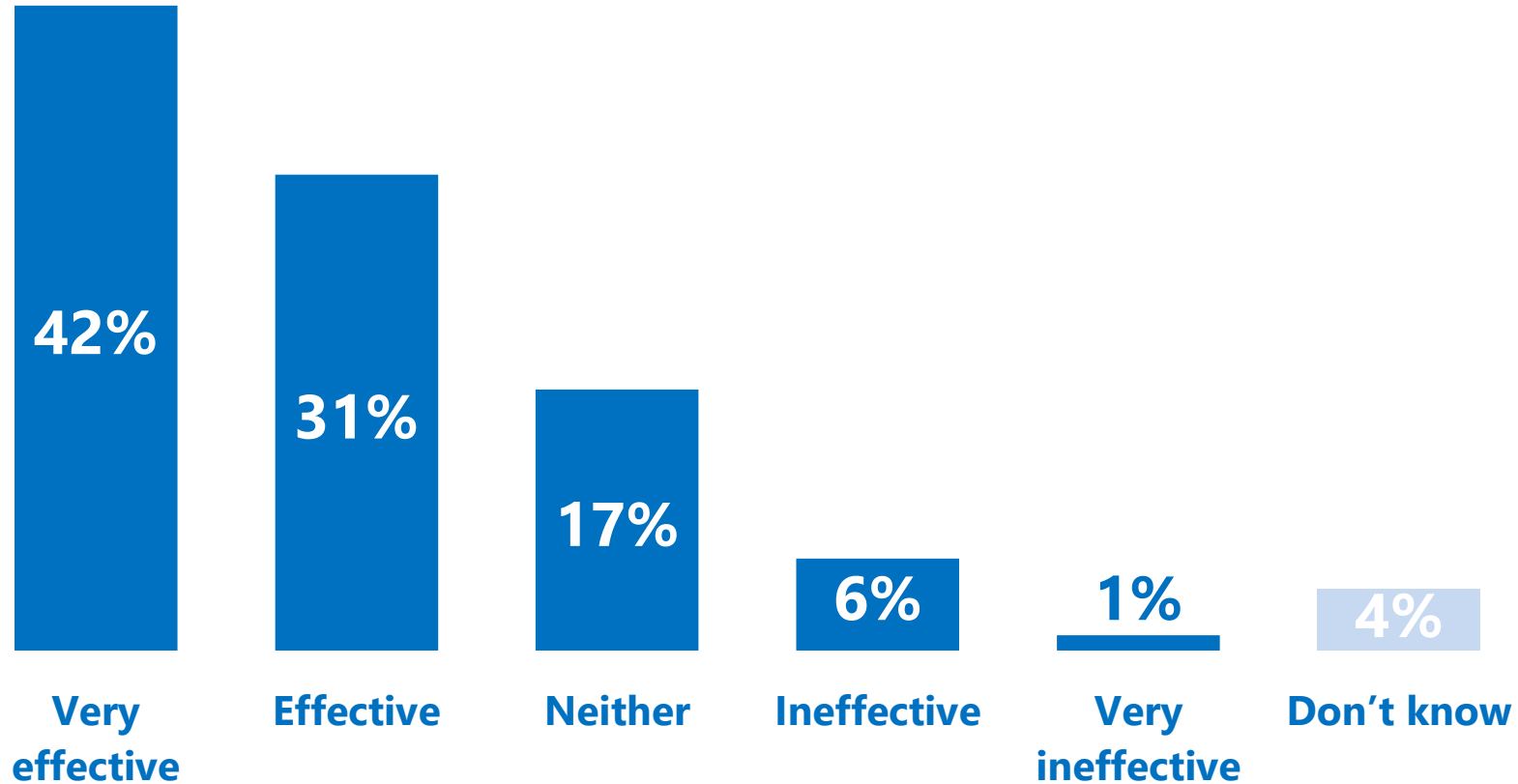
Q13. How useful do you find the following communications? Base 84

LinkedIn by far the most preferred social media channel



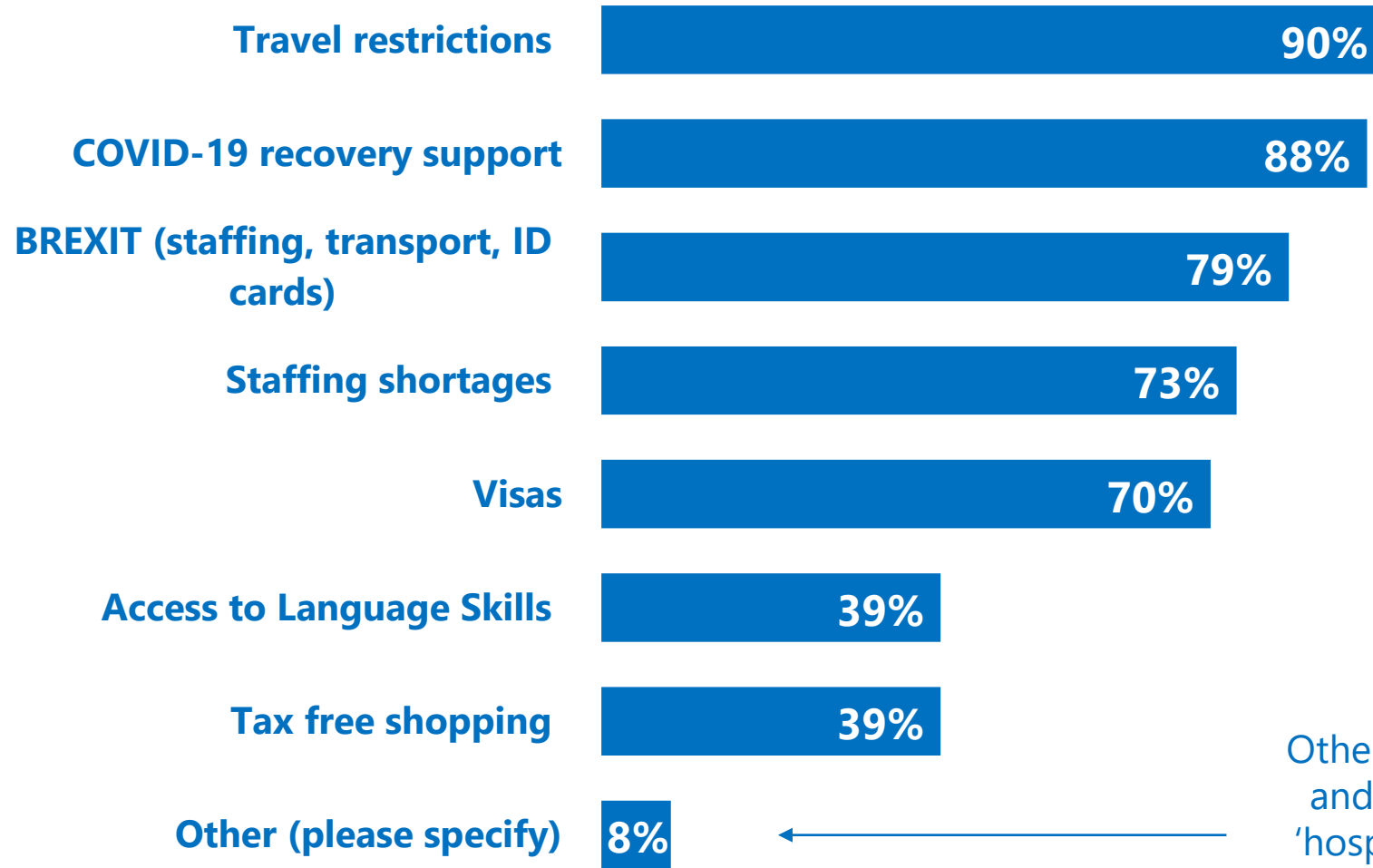
No significant differences in social media preferences by type of member or membership length

Nearly three-quarters feel UKinbound are effective at lobbying



Q16. How effective do you think UKinbound is at raising awareness/lobbying Government on key policy issues that impact the inbound tourism industry? Base 84

COVID-19 support and travel restrictions top lobbying wish-list



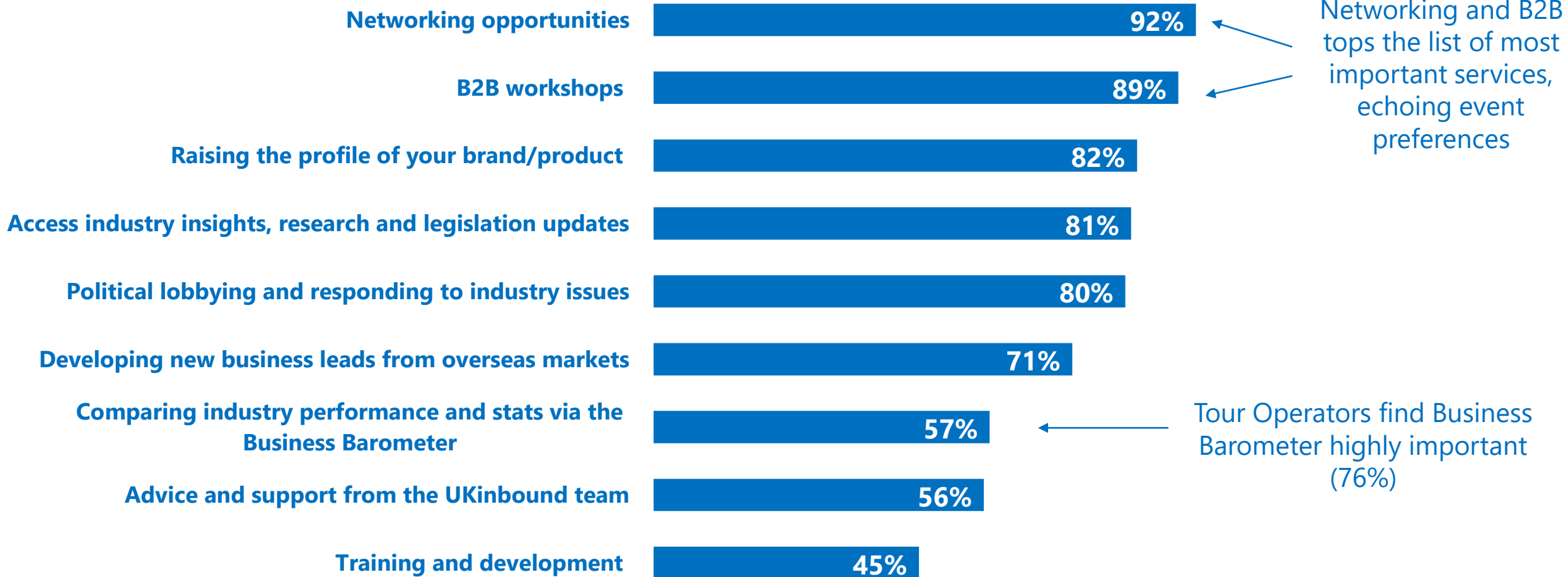
No significant differences in lobbying preferences by type of member or membership length

Other included 'sustainability and environmental issues', 'hospitality careers in young people', 'staffing'

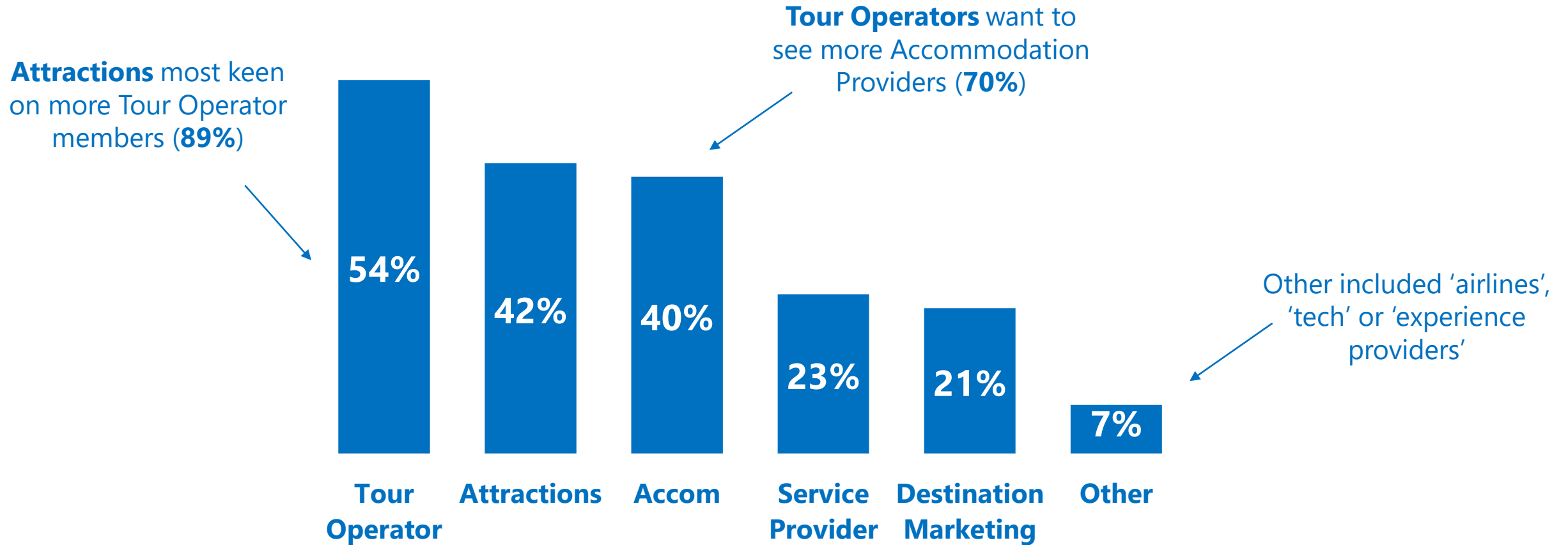
Membership



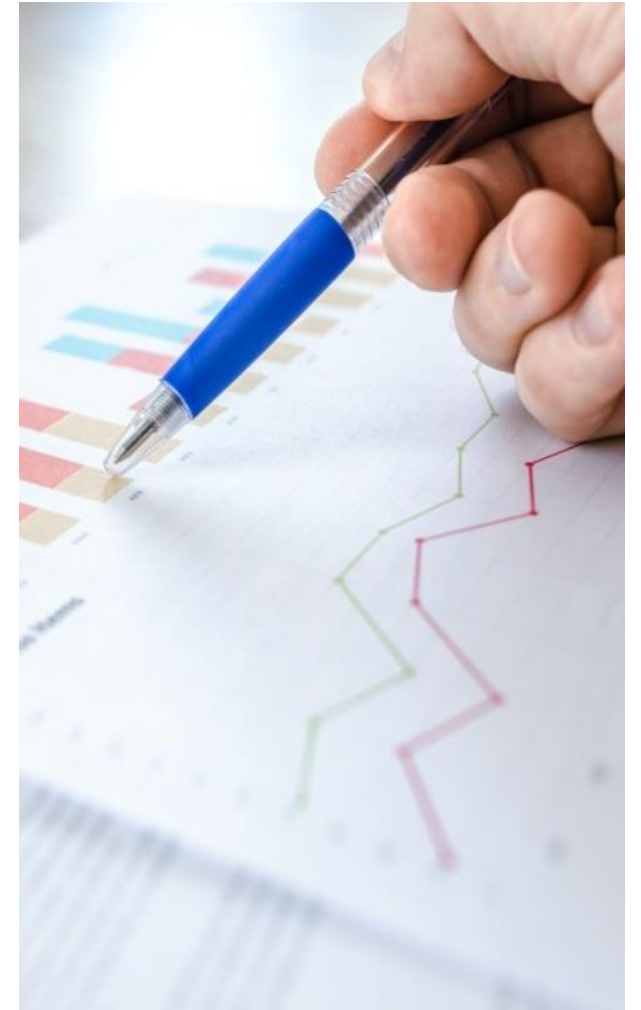
Most services 'important' or 'very important' to members



Members would like to see more Tour Operators in UKinbound



Return on Investment



Most see ROI as increased contacts and expect it after 1-2 years

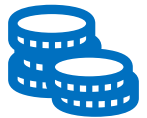
How do you measure ROI from your membership?...



63% increased contacts



36% increased bookings



33% increased revenue

How long does it take to see ROI from your membership?...

Under a year

12%

1-2 years

51%

Over 3 years

14%

Tour Operators more likely to measure ROI through contacts, while **Attractions** and **Service Providers** view ROI as bookings or revenue based

Vast majority of members still satisfied with their membership

89%

**satisfied with their
membership**



Q26. Overall, how satisfied are you with your UKinbound Membership? Base 84

Questions & contact

E: richard.bryan@qaresearch.co.uk

M: 07908220329

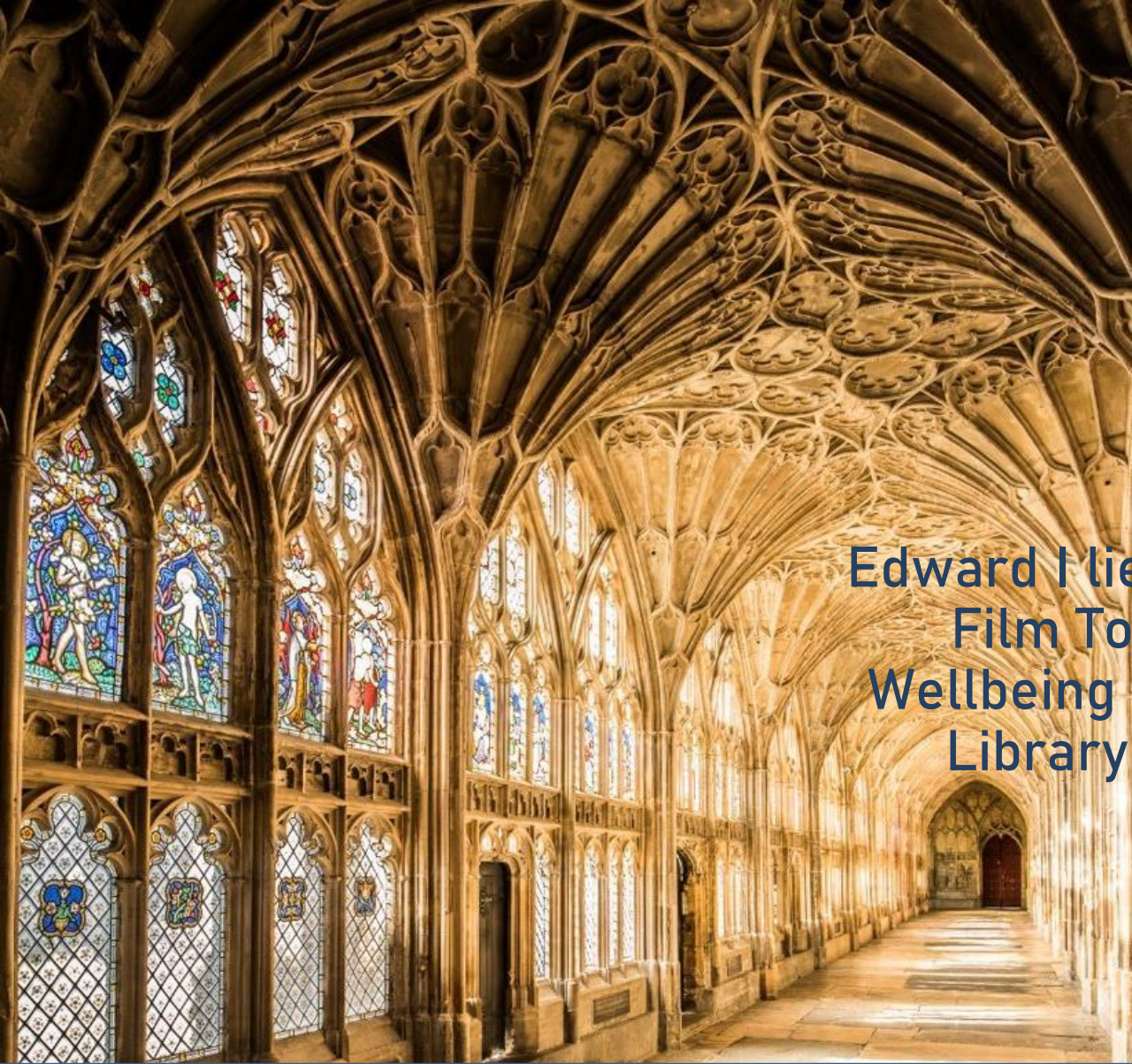
W: qaresearch.co.uk





GLOUCESTER

Experience the Urban Unexpected



Edward I lies in State
Film Tourism
Wellbeing Activities
Library Tours

Gloucester Cathedral





Cheese Rolling
Tall Ships
Kings Jam
Gloucester Goes Retro
Blues Festival
Guildhall Presents
Victorian Xmas Market
Bright Nights



Festivals and Events



SULA LV14
Hatton Court Hotel
The Thatch
The Painswick
Mercure Bowden Hall Hotel
Lock Keepers Inn
Judges Lodgings

Accommodation



Guildhall
Ski Slope
Paddleboarding
The Folk of Gloucester
Museum of Gloucester
National Waterways
Ninja Warrior
Brewery Tours
Walking Tours

Attractions

VISIT
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One of our biggest strengths is our setting



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CHELTENHAM
THE FESTIVAL
TOWN



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Fun Facts



Cheese Rolling

Humpty Dumpty

Cathedral East Window

Ice Cream

Star Spangled



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BACKTO
BUSINESS

DESTINATION RECOVERY

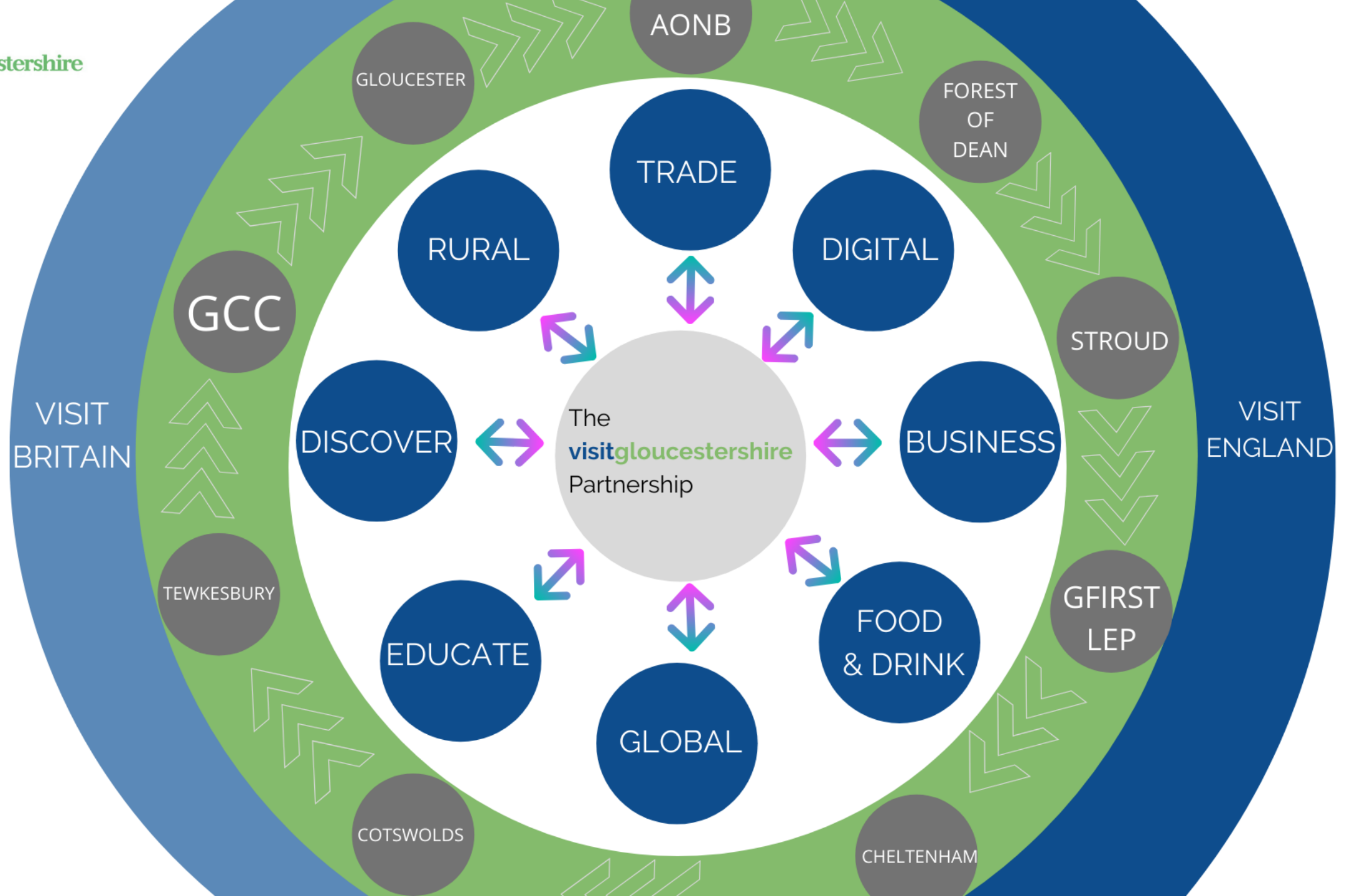
Sales & Marketing Director, The Hatton Hotel Collection

Director & Chair, Visit Gloucestershire

Introductions

Non-Executive Director, GCRP -
Gloucestershire Community Rail Partnership CIC

Chair, Gfirst LEP Visitor Economy Business Group



A Shared Agenda

A collaboration in tourism
that will accelerate a new
county-wide initiative for the
visitor economy



Places



Something for everyone in our vibrant, green county

Gloucestershire enjoys an abundance of natural beauty and heritage and a healthy tourism sector. The urban hearts of Cheltenham and Gloucester and the beautiful countryside, market towns and villages that surround them provide something for everyone.

We must exploit these advantages to be a 'magnet county' whilst ensuring that all communities, including those experiencing high unemployment and deprivation, have the chance to make a positive contribution to society.

To achieve Tourism Zone status as part of the Industrial Strategy Tourism Sector Deal.



Gloucestershire
2050



magnet



innovative



skilled



prosperous



inclusive



healthy,
happy



connected



sustainable

Size of the Industry

- ✓ The county has well over 400 visitor attractions of many different types;
- ✓ There are over 1,350 places to stay;
- ✓ 855 businesses employ almost 13,000 people;

Formal Visitor Economy Businesses

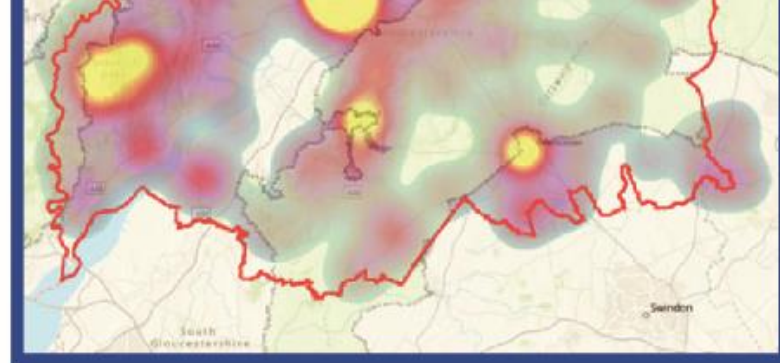
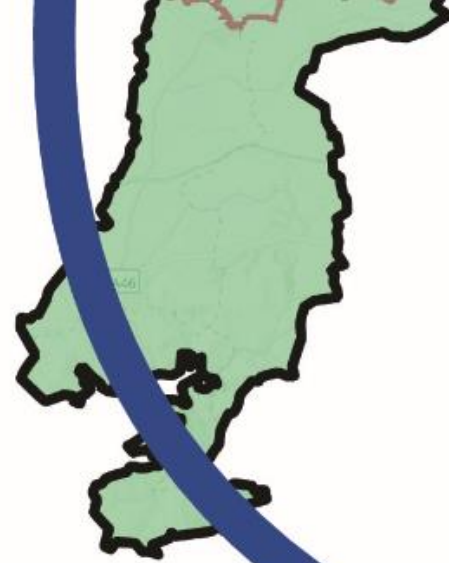
Gloucestershire	No. 855	Growth 2015-20 7.3%
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- ✓ The formal visitor economy sustained an estimated 12,822 direct jobs in Gloucestershire
- ✓ Almost half of these jobs in Gloucestershire (46%) were provided by the accommodation sector;
- ✓ An estimated 20% of the jobs in food and beverage services were sustained by visitor spending.
- ✓ Employment in visitor attractions is significant, reflecting the historic buoyancy of the sector with 9% of visitor economy related jobs being in attractions










Gloucestershire's Visitor Attractions by Type

Experience	121	Workplace	27
Museums & Art Galleries	47	Other	25
Historic Property	46	Wildlife	18
Place of Worship	39	Visitor Centre	17
Country Park	34	Leisure / Theme Park	8
Garden	27	Railway	4














Gloucestershire's Visitor Attractions by Type

 Restaurants & Cafés	270	 Visitor Attractions	47
 Accommodation	225	 Transport	46
 Travel Trade	85	 MICE	45
 Sports	58	 Car Hire	25
 Arts & Culture	54		

Gloucestershire Employment By Sector

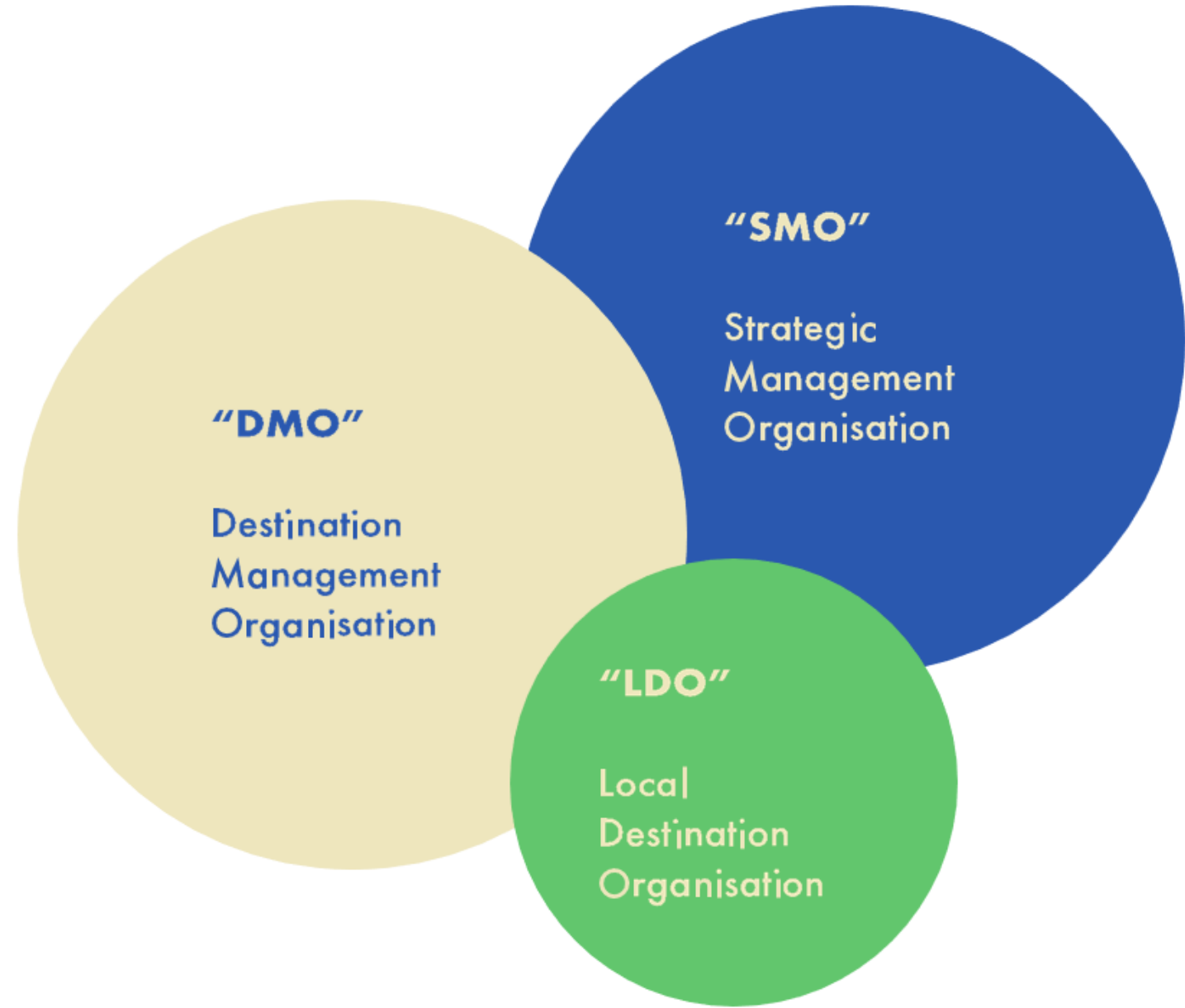
 Accommodation	5,945	46%
 Restaurants & Cafés etc.	3,845	30%
 Transport	315	2%
 Car Hire	88	1%
 Travel trade	670	5%
 MICE	220	2%
 Arts & Culture	169	1%
 Visitor Attractions	1,205	9%
 Sports	365	3%
	12,822	100%



Our Vision

Our vision is of a **thriving visitor economy** across Gloucestershire, optimising the value of tourism by creating **great visitor experiences**, generating **local economic benefits**, protecting **environmental assets** and enhancing **communities**.

'Top Level' Roles



sustainablegloucestershire
educategloucestershire
food&drinkgloucestershire

Visitor Experience



Thank you for listening...
Any Questions?

