Experience ‘Life Behind the Scenes’ – Exclusive or unique access to a historic building

Source: Experiences Research 2019

EXPERIENCE DASHBOARDS

A guide to using these dashboards and the data they contain

DEF Experiences Research 2018/19

Online survey in UK & 10 leading inbound markets
Fieldwork January/February 2019

- 1000 interviews in each country (Norway/Sweden – 500 in each)
- All sample non-rejectors of holiday travel to England
- **UK** – leisure breaks of 2+ nights in England
- **Australia, China, US** – Long-haul leisure travellers
- **Germany, Spain, France, Italy, Netherlands, Norway, Sweden** – Short-haul leisure travellers

Learning from the exploratory qualitative research in Germany, Australia and US in Q4 2018 also included where applicable

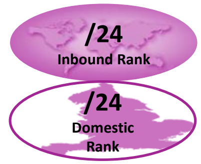
Experience Dashboards

Individual dashboards for each of the 24 experiences tested
Each dashboard provides

- insight into the appeal of the experience in England
- details of traveller behaviour with regard to the experience's influence on holiday decisions, the booking process, accommodation preferences and journey times
- An assessment of the opportunities and threats to the development of the experience in England for both the domestic and inbound markets

Learning from the individual experiences tested can be applied to other similar experiences that may be developed

Key Metrics Included



The ranks show on each page and in the summary table are based on the overall level of interest (done in the past, booked to do and interested in doing in future) compared to the other 23 experiences tested

The **'Share of Inbound Volume'** percentage is based on those interested in the experience in England as a percentage of the total volume of holiday visitors from each country visiting England in 2017 (source: IPS). The percentage shown is based on the total of the 10 inbound markets included within this research

EXPERIENCE SCORECARD

The **Experience Scorecard** shows how the experience performs on the key attributes that impact the potential for experience in England.

	Star rating – low to high
England Appeal	★★★★☆
Experience Maturity	★★☆☆☆
Authentic / Unique	★★★☆☆
History / Culture	★★★☆☆
Influence on holiday decision	★★★☆☆

England Appeal – the level of interest in the experience in England
Experience Maturity – the extent to which the experience is established as a holiday leisure activity
Authentic/Unique - elements of the experience that increase its appeal and value to tourism in England
History/Culture –.the extent to which the experience connects with England's heritage. The importance of this attribute will vary by experience type
Influence on holiday decision – highlighting whether the experience will drive decisions or if it is seen primarily as an 'add-on' activity

EXPERIENCE LIFE BEHIND THE SCENES: SUMMARY

EXCLUSIVE OR UNIQUE ACCESS TO A HISTORIC BUILDING

1/24 Inbound Rank

3/24 Domestic Rank

EXPERIENCE SCORECARD METRICS*

	Star rating – low to high
England Appeal	★★★★☆
Experience Maturity	★★★★★
Authentic / Unique	★★★★☆
History / Culture	★★★★★
Influence on holiday decision	★★★☆☆

DEMOGRAPHIC SKEWS

+ 55 plus
+ Explorers and Sightseers (Inbound)
+ Couples and family activity

Similar High Interest, Established Experiences (included in the research)

- Distillery or brewery experience
- Street food tour and tasting
- Guided nature experience
- Vineyard tour & tasting
- Spa experience

ENGLAND APPEAL

- UK already a **leading destination** for this type of experience
- The **historic element** makes it a good fit with an English holiday
- The qualitative research highlights the **'fun' factor**, dressing up and seeing a historic location both felt to be adventurous and entertaining

CHALLENGES

- **Not necessarily understood as an expert guided experience.** Products differentiation will be important to distinguish from current historic house/castle offers
- **Some risk of it being seen as 'cheesy' or contrived**. So a high quality, authentic experience is important
- It appeals to **older people and to families** so would need clarity of communications to attract the relevant audience

OPPORTUNITIES

- UK already an established destination for this type of experience. There is opportunity to position a **higher value immersive experience** that goes beyond the 'basic' tour of historic attractions
- Current expectation leans towards London, though this will be driven by exiting knowledge levels. The opportunity to use this as a means to **promote regional England** is strong, provided journey times are not a barrier

* See next slide for metrics used to define scorecard metrics

EXPERIENCE LIFE BEHIND THE SCENES: SCORECARD METRICS

EXCLUSIVE OR UNIQUE ACCESS TO A HISTORIC BUILDING

1/24 Inbound Rank

3/24 Domestic Rank

ENGLAND APPEAL / MATURITY	*% Interest in doing experience in England*	*Ranking out of 24 experiences*	*Share of inbound Volume**
UK *(Domestic)*	71%	3	
All Inbound Markets	67%	1	*100%*
Australia	75%	1	6%
China	80%	6	3%
Germany	65%	1	16%
Spain	67%	2	12%
France	69%	1	19%
Italy	61%	5	8%
Netherlands	53%	1	7%
Norway	63%	2	3%
Sweden	55%	3	4%
United States	78%	2	23%

* Based on IPS 2017 FY data

Indicates where ranking is lower (+4 from inbound markets)

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	14% ↓	7%
Other countries have better experiences	10% ↓	7%

N.B. Lower figures for these measures are good better - i.e. you want less people likely to book in another country

CORE COMPONENTS OF EXPERIENTIAL

Components experiential providers should emulate or amplify to encourage travellers to participate in England

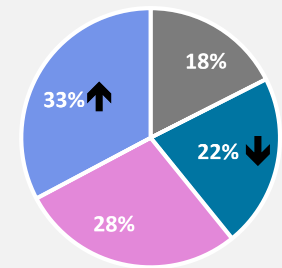
	Inbound	UK
UNIQUE to England	19% ↑	17%
AUTHENTIC to England	25% ↑	27% ↑
Immerse in **CULTURE / HISTORY**	45% ↑	42% ↑
Create distinctive **MEMORIES**	32%	33%
CHALLENGE - Something they can't do at home	23%	33%

↓↑ Significantly better than other experiences

↓↑ Significantly worse than other experiences

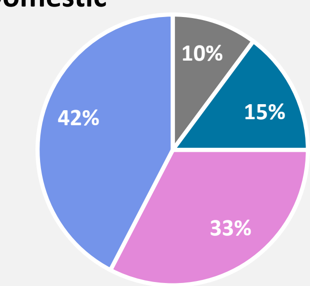
INFLUENCE ON HOLIDAY DECISION

Inbound



- Main reason
- Significant influence
- Small influence
- No influence

Domestic



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↓ Significantly lower than other experiences

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Source: Experiences Research 2019

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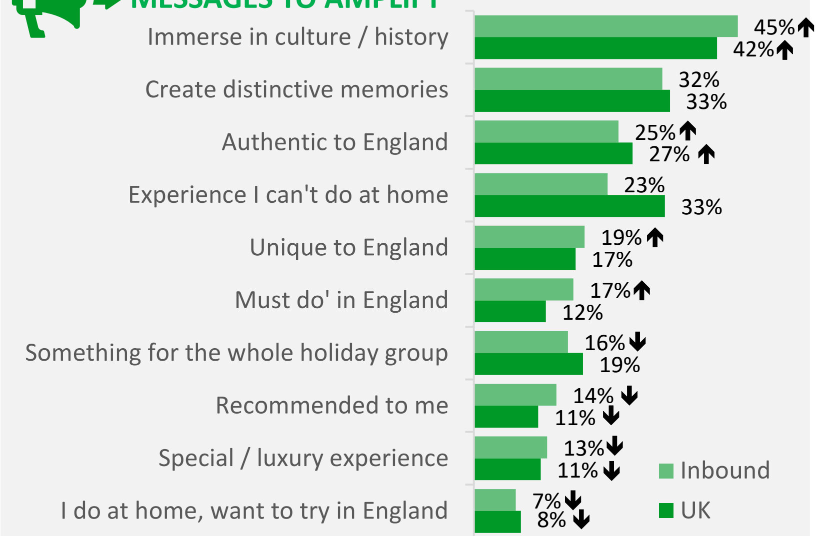
LIFE BEHIND THE SCENES: OPTIMISING THE POTENTIAL

EXCLUSIVE OR UNIQUE ACCESS TO A HISTORIC BUILDING

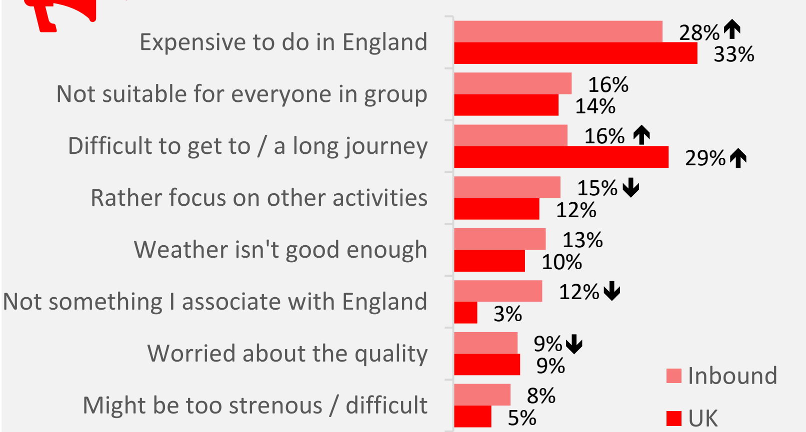
1/24 Inbound Rank

3/24 Domestic Rank

MESSAGES TO AMPLIFY



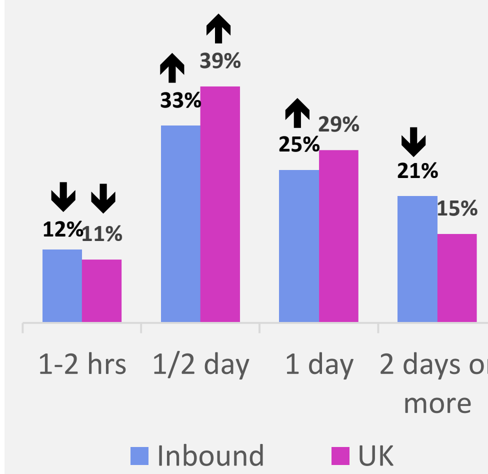
BARRIERS TO ADDRESS



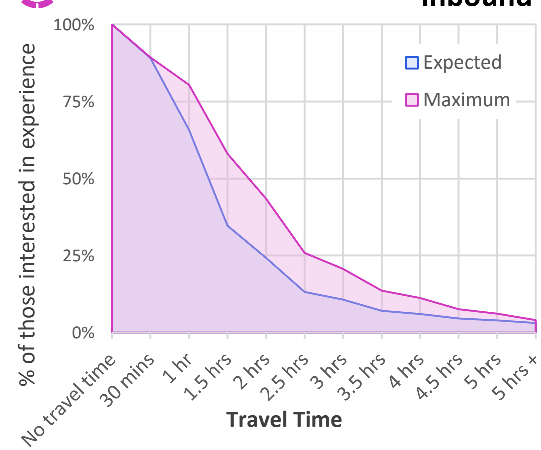
CROSS-OVER INTEREST

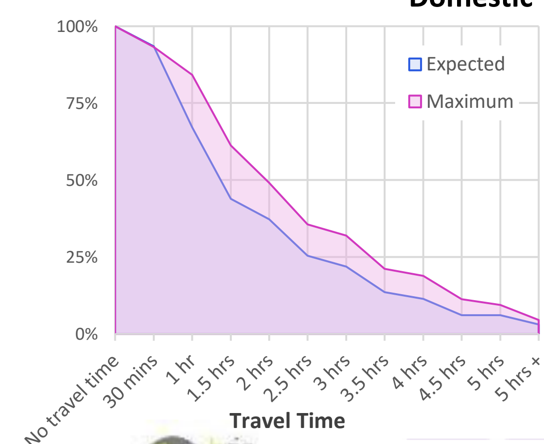
Inbound	UK
Cross-over activities	
Exploring history and heritage – 58%	Exploring history and heritage – 61%
Visiting famous / iconic places – 53%	Visiting famous / iconic places – 46%
Other experiences of interest	
Distillery / brewery experience – 77%	Vineyard tour & tasting – 80%
Street food tour & tasting – 77%	Distillery or brewery experience – 80%

EXPERIENCE DURATION



TRAVEL TIME





VisitEngland

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LIFE BEHIND THE SCENES: BOOKING BEHAVIOURS

EXCLUSIVE OR UNIQUE ACCESS TO A HISTORIC BUILDING

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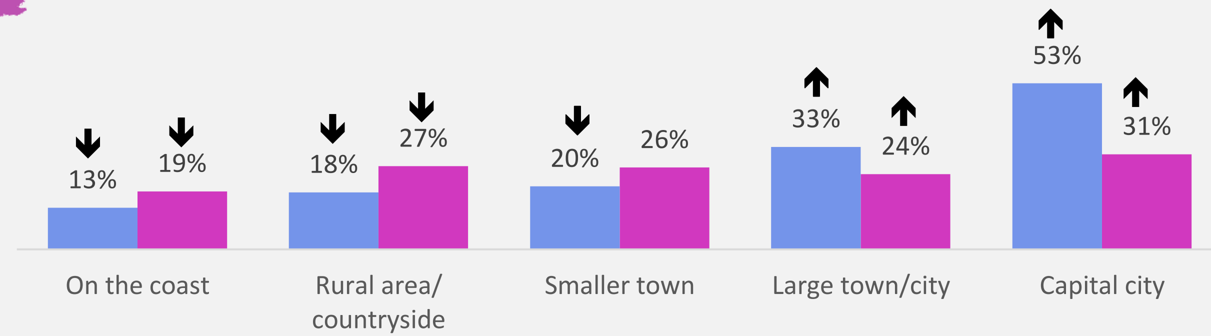
3/24 Domestic Rank

RESEARCH CHANNELS

	Inbound	UK
General internet search	46% ↑	50%
Traveller Review Site	32%	33%
Travel guidebook	31% ↑	28%

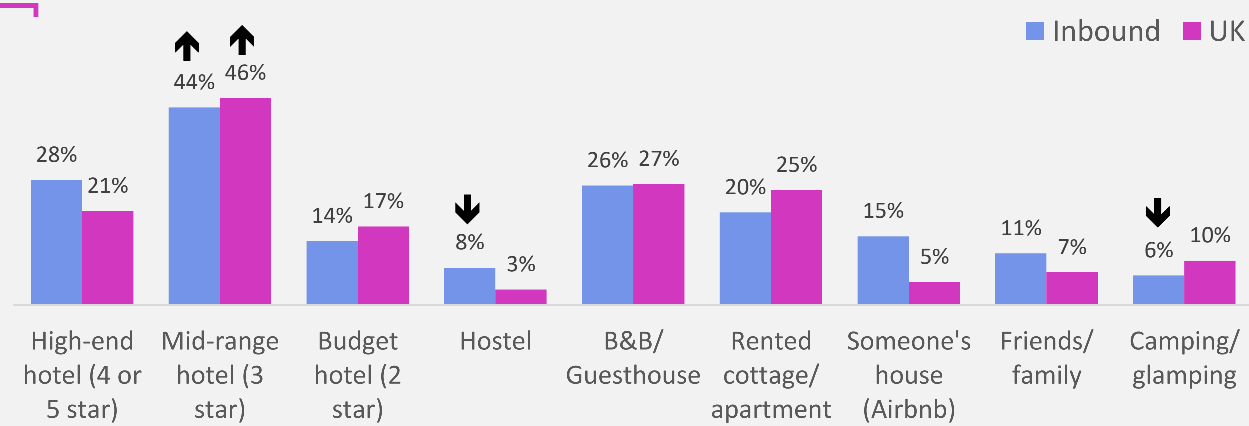
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	52% ↓	61%
Booked in destination	34% ↑	29%

ACCOMMODATION TYPE



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LIFE BEHIND THE SCENES: GO TO MARKET CHECKLIST

EXCLUSIVE OR UNIQUE ACCESS TO A HISTORIC BUILDING

1/24 Inbound Rank

3/24 Domestic Rank

Experience Attributes	Experience Performance	Consideration for action
Positioning as **authentic and unique** to England	Strong	Key to the success of this experience. Quality of delivery is essential
Current **country ownership** of the experience	UK & Others	UK is currently a leading destination
Provide **enrichment**, fun, challenge or learning	Yes	Through the immersive activities, that provide genuine learning
Create **distinctive memories** to keep and share	Yes	Particularly through immersive activities (dressing up, active involvement etc.)
Provide **cultural** or **historical immersion**	Yes	This is at the heart of this experience, combined with the 'fun learning' element gives wide appeal
Expert-led or self-guided option	Either	Current expectations may be for self-guided. Expert led provides a more immersive experience at a higher price point
Need to mitigate for the **weather**	Potentially	Depending on the experience, indoor activities will be important
Established, **known** and **understood** experience	Yes	Basic assumption is of a 'standard' tour. A more immersive, interactive experience needs clear communication
Accessing the **target audience**	Mainstream	Need clarity of targeting to match the product e.g. is it designed for adults or children?
Bookable product	Yes	As part of holiday package and/or pre-booking of 'enhanced' experience
Local promotion and **in-destination bookings**	Important	Word-of-mouth and local promotion will drive in-destination bookings
Acceptable **journey times**	Short	Typically 1 – 1.5 hrs is the acceptable journey time from accommodation
Fixed duration or **variable length** activity	½ day	Expectation of ½ day, but could extend to a day
Packaging with other activities	Local	As part of a regional communication to make the journey time acceptable