

Guided Nature Experience – Go bird watching or observe wildlife in their natural habitat



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.

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

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

GUIDED NATURE EXPERIENCE: SUMMARY

GO BIRD WATCHING OR OBSERVE WILDLIFE IN THEIR NATURAL HABITAT



EXPERIENCE SCORECARD METRICS*

Star rating – low to high

	England Appeal	★★★★☆
	Experience Maturity	★★★★☆
	Authentic / Unique	★★★☆☆
	History / Culture	★★☆☆☆
	Influence on holiday decision	★★★☆☆



DEMOGRAPHIC SKEWS

- + Over 55s
- + Males
- + Adventurers, Explorers (Inbound)
- + Couples, With children

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

- Experience 'Life behind the scenes'
- Distillery or brewery experience
- Street food tour & tasting
- Spa experience
- Vineyard tour & tasting



ENGLAND APPEAL

- Seen as a **relaxing** way to **explore** the English countryside
- It provides an **authentic** experience, an immersion into English **culture/history** and can provide **distinctive memories**



CHALLENGES

- Birdwatching specifically does not have wide appeal. A wider reach would come through '**observing native wildlife**'
- Tends to appeal to **older people** or those with **children**. Clear communication of the target audience will be important
- Other countries potentially have **more dramatic/exciting offers** in terms of the landscape and wildlife that may be seen
- The **weather** is significant potential barrier



OPPORTUNITIES

- **Can drive destination choice** and people are willing to spend **longer than average getting to the experience**, so it can be the lead experience within a holiday package



* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



GUIDED NATURE EXPERIENCE: SCORECARD METRICS

GO BIRD WATCHING OR OBSERVE WILDLIFE IN THEIR NATURAL HABITAT



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	68%	7	
<i>All Inbound Markets</i>	63%	4	100%
Australia	63%	4	5%
China	87%	2	3%
Germany	63%	3	17%
Spain	62%	5	12%
France	66%	3	20%
Italy	65%	3	9%
Netherlands	47%	3	7%
Norway	50%	5	3%
Sweden	40%	6	3%
United States	70%	5	22%

* Based on IPS 2017 FY data

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	20% ↓	11%
Other countries have better experiences	19%	11%

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

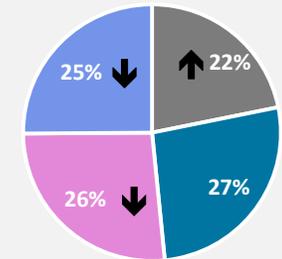
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	14%	12%
AUTHENTIC to England	18%	22%
Immerse in CULTURE / HISTORY	23% ↑	19%
Create distinctive MEMORIES	33% ↑	33%
CHALLENGE - Something they can't do at home	19%	26%

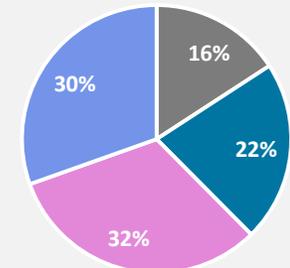
INFLUENCE ON HOLIDAY DECISION

Inbound



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

Domestic



↑ Significantly higher than other experiences

↓ Significantly lower than other experiences

↓ ↑ Significantly better than other experiences

↓ ↑ Significantly worse than other experiences



Source: Experiences Research 2019

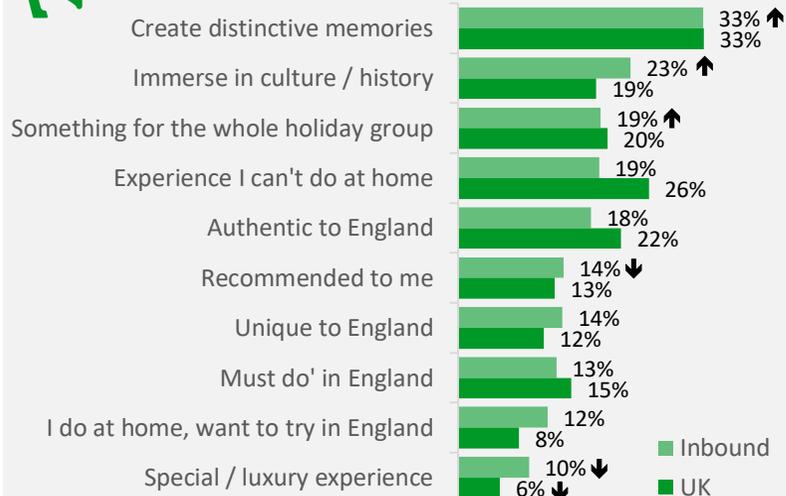


GUIDED NATURE EXPERIENCE: OPTIMISING THE POTENTIAL



GO BIRD WATCHING OR OBSERVE WILDLIFE IN THEIR NATURAL HABITAT

MESSAGES TO AMPLIFY



CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Experiencing rural life / scenery – 53%	Experiencing rural life / scenery – 59%
Outdoor leisure pursuits – 42%	Visiting a park or garden – 43%
Other experiences of interest	
'Life behind the scenes' – 80%	'Life behind the scenes' – 83%
Street food tour & tasting – 79%	Distillery or brewery experience – 82%

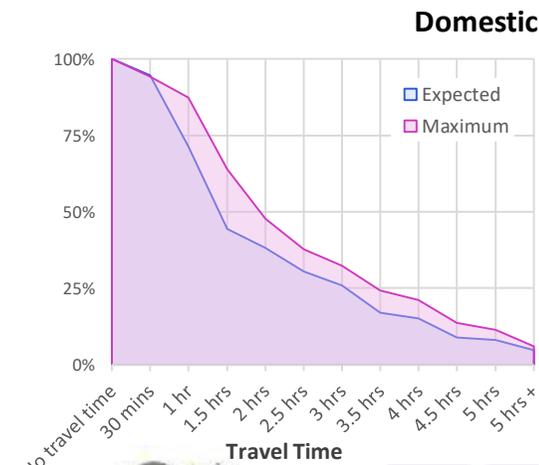
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



GUIDED NATURE EXPERIENCE: BOOKING BEHAVIOURS

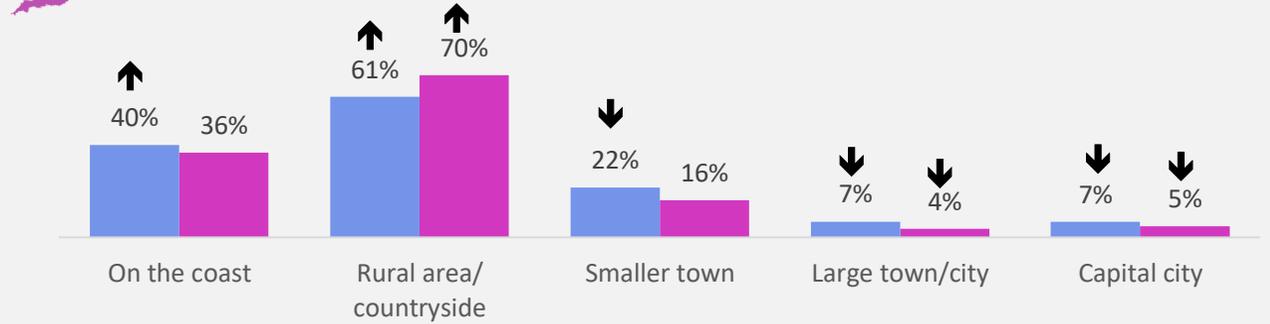
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RESEARCH CHANNELS

	Inbound	UK
General internet search	43% ↑	59%
Traveller Review Site	31%	33%
Tourism Office	30% ↑	31%

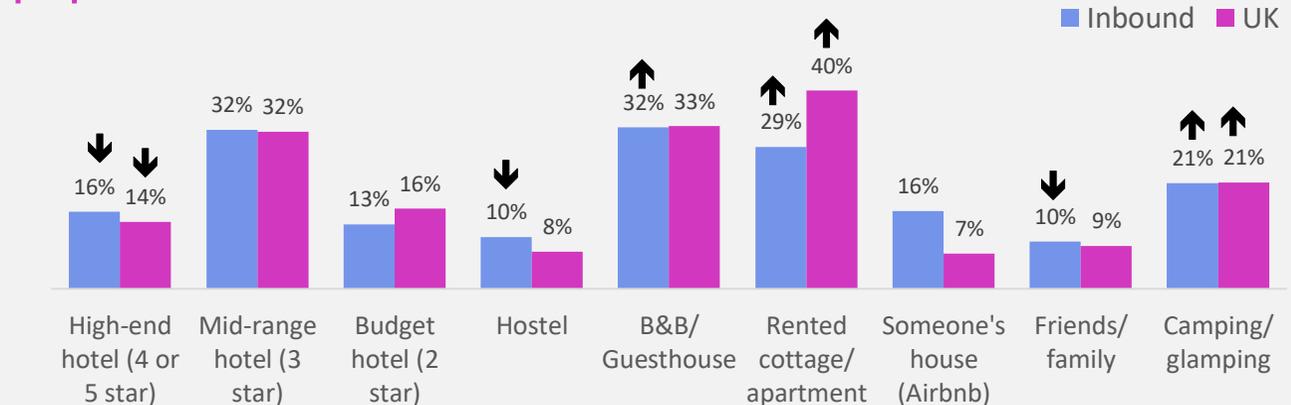
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	58% ↓	63%
Booked in destination	31% ↑	28% ↑

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



GUIDED NATURE EXPERIENCE: GO TO MARKET CHECKLIST



GO BIRD WATCHING OR OBSERVE WILDLIFE IN THEIR NATURAL HABITAT

Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	High	The experience clearly provides an insight into ‘real’ England
Current country ownership of the experience	Various	Important to ensure the experience is unique to England – landscape and/or wildlife
Provide enrichment , fun, challenge or learning	Strong	Experience must be clearly positioned for the target audience in terms of effort required and the extent of learning it will provide
Create distinctive memories to keep and share	High	Offering chance to see things that would not otherwise be possible
Provide cultural or historical immersion	Potential	Depending on the experience it can offer more in terms of culture/history – animal husbandry, working animals, land management etc.
Expert-led or self-guided option	Either	Expert-led provides opportunity for personalised high-value experiences, but self-guided options will increase the overall opportunity
Need to mitigate for the weather	Yes	Weather is an unavoidable challenge for this experience
Established, known and understood experience	Yes	Whilst the broad concept is understood, each experience will be unique
Accessing the target audience	Mainstream	Ensuring the target audience is clearly communicated is important
Bookable product	Yes	Whilst currently likely to be booked in-destination, advance bookings can drive destination choice
Local promotion and in-destination bookings	Important	Local promotion & traveller recommendations to drive incremental sales
Acceptable journey times	1 -2 hours	Willingness to travel for this experience
Fixed duration or variable length activity	Variable	Most expect 1 day, but extended ‘safari’ option may also appeal
Packaging with other activities	Rural	Part of a rural holiday; other outdoor activities and ‘life behind the scenes’