Fossil Hunting – Explore and uncover history with an expert guide

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

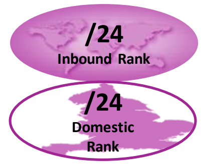
Experience Dashboards

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

VisitEngland

Source: Experiences Research 2019

brio research and consulting

XV Insight

FOSSIL HUNTING EXPERIENCE: SUMMARY

EXPLORE AND UNCOVER HISTORY WITH AN EXPERT GUIDE

16/24 Inbound Rank

14/24 Domestic Rank

EXPERIENCE SCORECARD METRICS*

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

DEMOGRAPHIC SKEWS

+ Older travellers
+ Males
+ Adventurers (Inbound)
+ With children

Other Niche Experiences (included in the research)

- Street art
- Foraging experience
- Guided fishing experience

ENGLAND APPEAL

- Although a relatively low interest activity, England is recognised as a good place for fossil hunting. **Coastal locations** are the most likely destinations. It is of lower interest for tourist from China

CHALLENGES

- Can be seen as **strenuous or hard work** by some. Would need clear communication of the activity and who it is suitable for. Introducing some fun element would increase appeal for children and families
- The **accommodation expectations** are lower cost including B&B and camping. This suggests careful pricing of the experience will be needed

OPPORTUNITIES

- The opportunity to do something that **can't be done at home** is recognised and the experience can be strongly linked to **regional England**, perhaps combined with other activities in the same area
- Most people would not be willing to travel far for this experience, suggesting an opportunity for incremental sales to people staying in the vicinity

* See next slide for metrics used to define scorecard metrics

FOSSIL HUNTING EXPERIENCE: SCORECARD METRICS

EXPLORE AND UNCOVER HISTORY WITH AN EXPERT GUIDE

16/24 Inbound Rank

14/24 Domestic Rank

ENGLAND APPEAL / MATURITY	*% Interest in doing experience in England*	*Ranking out of 24 experiences*	*Share of inbound Volume**
UK *(Domestic)*	58%	14	
All Inbound Markets	*42%*	16	*100%*
Australia	49%	14	6%
China	66%	22	4%
Germany	38%	14	16%
Spain	38%	18	11%
France	37%	18	17%
Italy	42%	15	9%
Netherlands	28%	14	6%
Norway	31%	14	2%
Sweden	26%	21	3%
United States	54%	18	26%

* 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	**20%**	**7%**
Other countries have better experiences	**16%**	**6%**

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

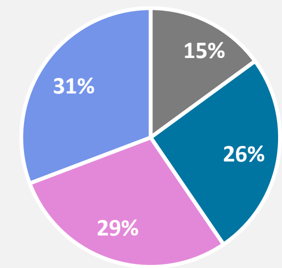
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	**UK**
UNIQUE to England	**13%**	**13%**
AUTHENTIC to England	**13%** ↓	**16%**
Immerse in **CULTURE / HISTORY**	**27%** ↑	**24%**
Create distinctive **MEMORIES**	**28%**	**30%**
CHALLENGE - Something they can't do at home	**22%** ↑	**31%**

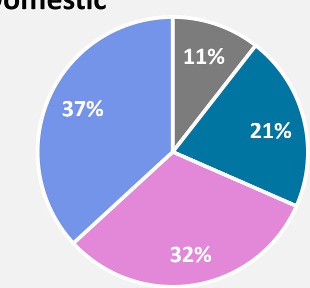
INFLUENCE ON HOLIDAY DECISION

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

VisitEngland

Source: Experiences Research 2019

brio research and consulting

XV Insight

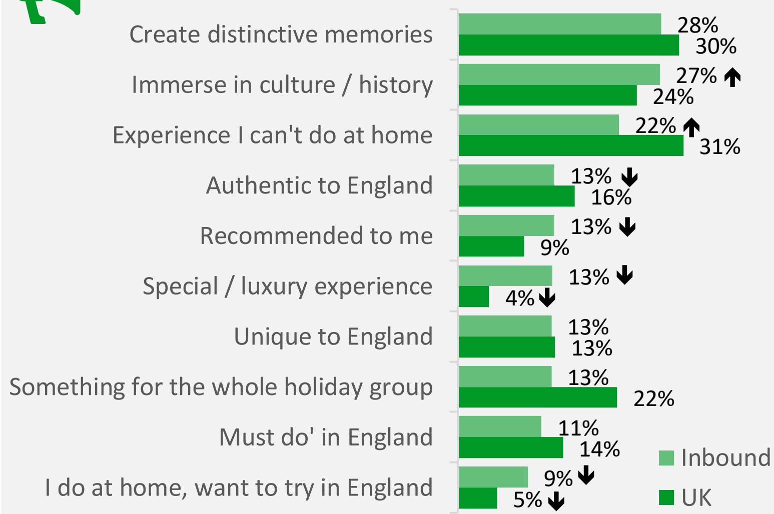
FOSSIL HUNTING EXPERIENCE: OPTIMISING THE POTENTIAL

EXPLORE AND UNCOVER HISTORY WITH AN EXPERT GUIDE

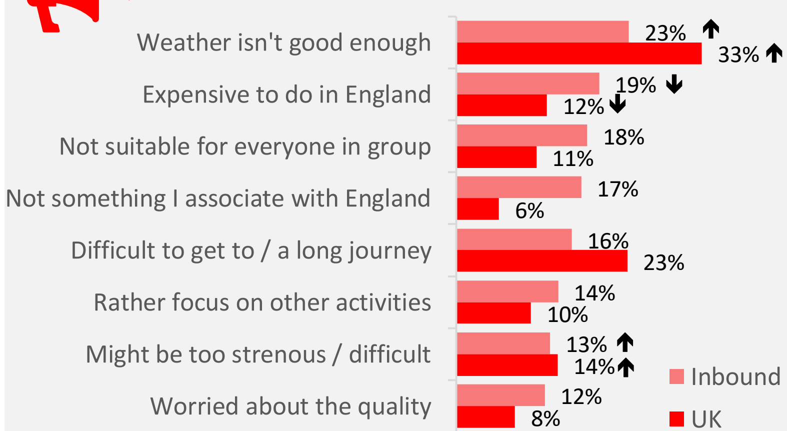
16/24 Inbound Rank

14/24 Domestic Rank

MESSAGES TO AMPLIFY



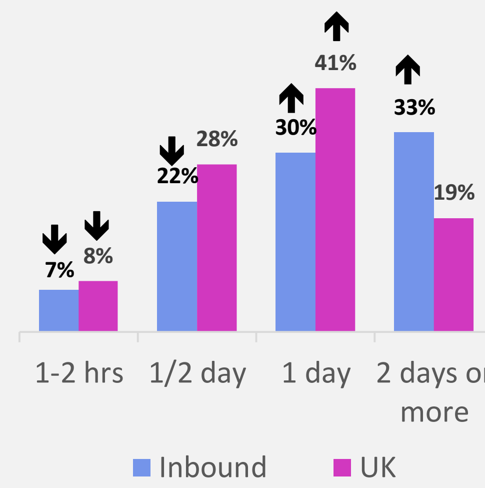
BARRIERS TO ADDRESS



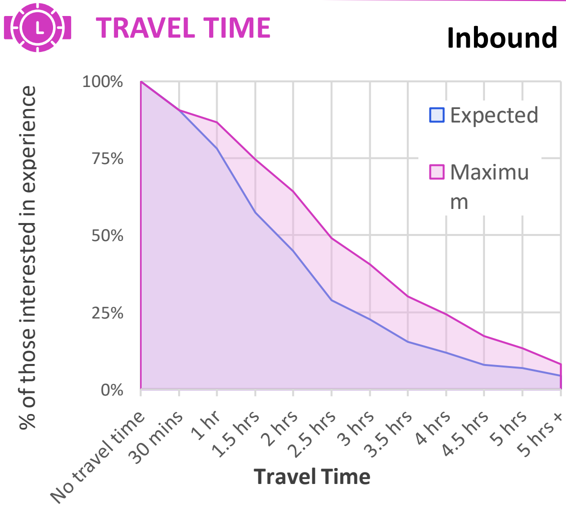
CROSS-OVER INTEREST

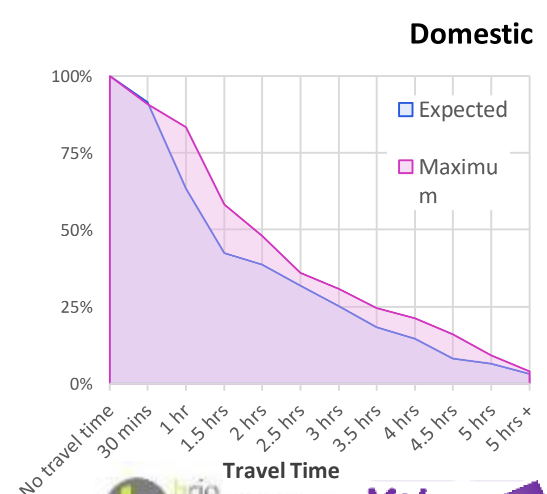
Inbound	UK
Cross-over activities	
Exploring history & heritage - 35%	Exploring history & heritage - 45%
Experiencing rural life / scenery – 33%	Experiencing rural life / scenery – 41%
Other experiences of interest	
Guided nature experience – 88%	'Life behind the scenes' – 85%
'Life behind the scenes' – 87%	Guided nature experience – 84%

EXPERIENCE DURATION



TRAVEL TIME





FOSSIL HUNTING EXPERIENCE: BOOKING BEHAVIOURS

EXPLORE AND UNCOVER HISTORY WITH AN EXPERT GUIDE

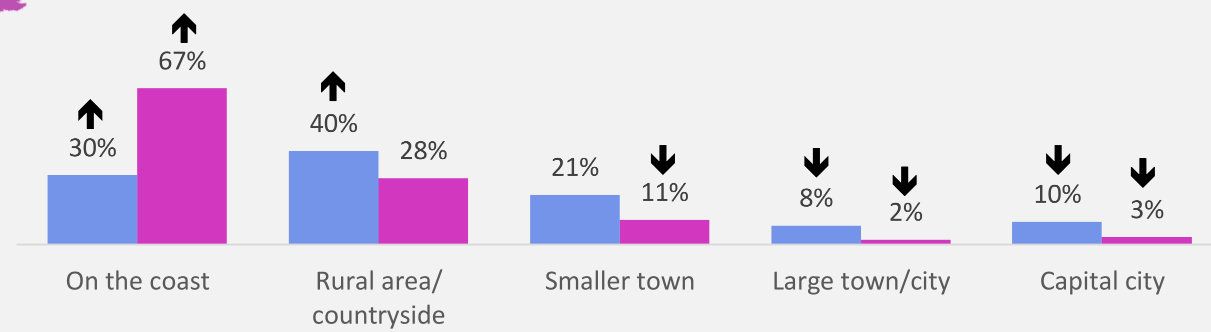
16/24 Inbound Rank

14/24 Domestic Rank

RESEARCH CHANNELS

	Inbound	UK
General internet search	32%	65% ↑
Travel Guidebook	26% ↑	22%
Tourism Office	24% ↑	35% ↑

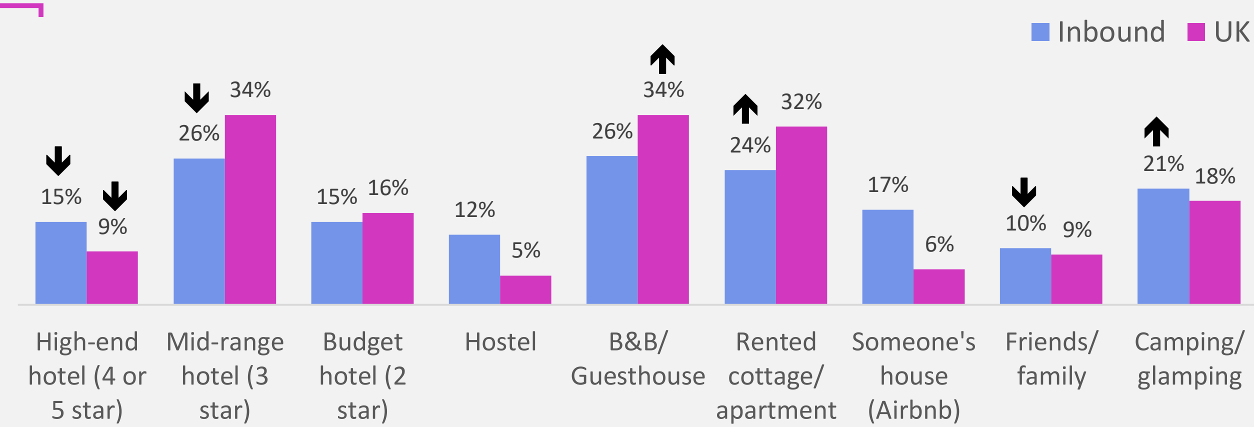
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	57%	57% ↓
Booked in destination	31%	31% ↑

ACCOMMODATION TYPE



↑ Significantly higher than other experiences

↓ Significantly lower than other experiences

VisitEngland

Source: Experiences Research 2019

brio research and consulting

XV Insight

FOSSIL HUNTING EXPERIENCE: GO TO MARKET CHECKLIST

EXPLORE AND UNCOVER HISTORY WITH AN EXPERT GUIDE

16/24 Inbound Rank

14/24 Domestic Rank

Experience Attributes	Experience Performance	Consideration for action
Positioning as **authentic and unique** to England	Yes	Fossils that are unique to England would drive this perception
Current **country ownership** of the experience	None	England is already established as a suitable destination
Provide **enrichment**, fun, challenge or learning	Yes	Careful positioning of whether the experience is primarily fun or educational will be important
Create **distinctive memories** to keep and share	Yes	Particularly as a family activity
Provide **cultural** or **historical immersion**	Yes	Could be combined with other local history or countryside/coastal activities
Expert-led or self-guided option	Either	Expert-led and personalised allows for increases in pre-booking and price
Need to mitigate for the **weather**	Yes	Either through offering bad-weather alternatives (indoor experiences) or provision of bad-weather clothing etc.
Established, **known** and **understood** experience	Partially	Exact details of the activity may not be clearly understood and should be communicated
Accessing the **target audience**	Older or families	Clear positioning and targeting – adults or children, expert or casual, relaxed or strenuous etc.
Bookable product	Potential	Via travel trade as part of a package
Local promotion and **in-destination bookings**	Essential	Through local travel guides, promotion and advocacy
Acceptable **journey times**	Short	As an add-on activity people will take part if close to where they are staying rather than It being a driver of destination choice
Fixed duration or **variable length** activity	Variable	Depending on 'seriousness' of experience and target audience
Packaging with other activities	Potential	Options for bad weather alternatives, other nature-based experiences