

Guided Fishing – To catch and cook your own dinner



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 FISHING EXPERIENCE: SUMMARY

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EXPERIENCE SCORECARD METRICS*

Star rating – low to high

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

DEMOGRAPHIC SKEWS

- + Under 35s (inbound)
- + Male
- + BuzzSeekers (Inbound)
- + Friends, Children

Other Niche Experiences (included in the research)

- Foraging experience
- Fossil hunting
- Street art



ENGLAND APPEAL

- Currently **not immediately seen as a English activity**, countries such as Canada and Norway are popular
- Perceived to be a **specialist activity** for those that enjoy fishing. Some suggested making local recipes such as fish and chips for example to broaden appeal.
- **Fishing rather than cooking** drives perceptions of this experience



CHALLENGES

- **Weather** is a barrier for those not committed to fishing
- Does **not appeal** to all
- Lacks clarity around the **level of fitness** required – it could be strenuous or relaxed



OPPORTUNITIES

- A small number of people (qualitative) saw opportunity to eat freshly caught fish as an **exciting and adventurous** experience
- Can be positioned on a spectrum from **high adventure to gentle family activity**
- Promotes **England's coast**

GUIDED FISHING EXPERIENCE: SCORECARD METRICS

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ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	41%	24	
All Inbound Markets	40%	20	100%
Australia	42%	20	6%
China	76%	13	5%
Germany	33%	18	15%
Spain	32%	23	10%
France	39%	16	19%
Italy	35%	21	8%
Netherlands	18%	20	4%
Norway	29%	19	2%
Sweden	28%	16	3%
United States	54%	19	28%

* Based on IPS 2017 FY data

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

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	18%	18%
Other countries have better experiences	18%	15%

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

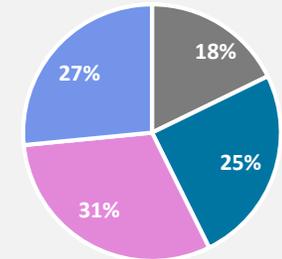
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	10%	16%
AUTHENTIC to England	11% ↓	16%
Immerse in CULTURE / HISTORY	10% ↓	9%
Create distinctive MEMORIES	28% ↑	25%
CHALLENGE - Something they can't do at home	17%	34%

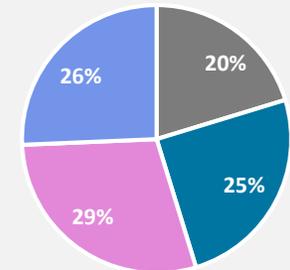
INFLUENCE ON HOLIDAY DECISION

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

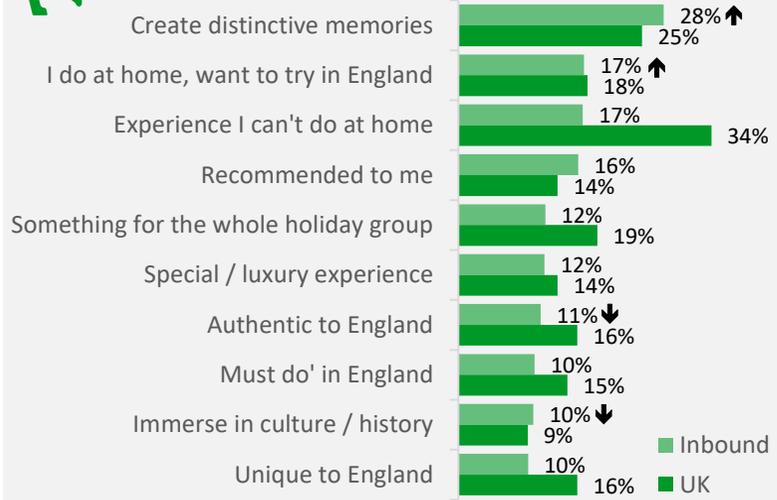


GUIDED FISHING EXPERIENCE: OPTIMISING THE POTENTIAL



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MESSAGES TO AMPLIFY



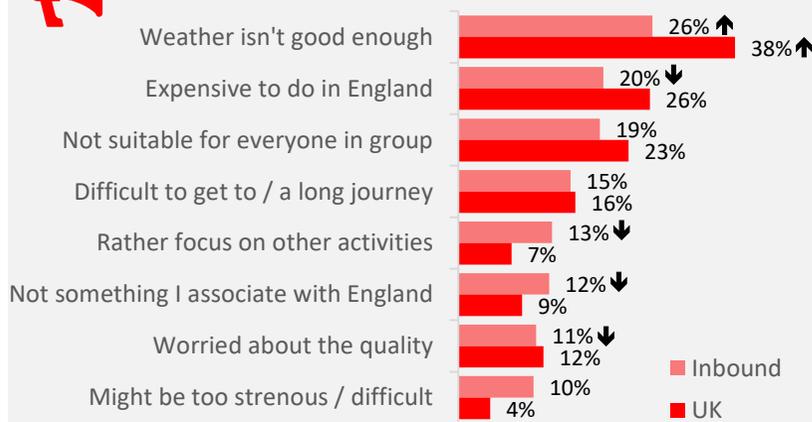
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Experiencing rural life / scenery – 29%	Experiencing rural life / scenery – 26%
Outdoor leisure pursuits – 25%	Outdoor leisure pursuits – 26%
Other experiences of interest	
Street food tour & tasting – 86%	Vineyard tour & tasting – 90%
Distillery / brewery experience – 85%	Distillery or brewery experience – 90%

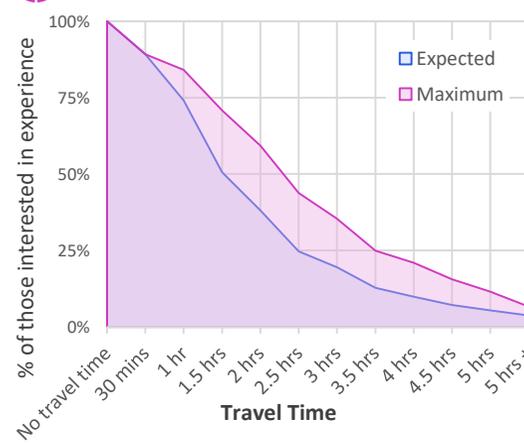
EXPERIENCE DURATION



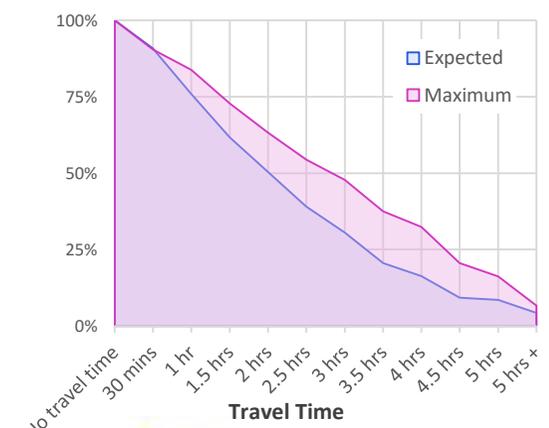
BARRIERS TO ADDRESS



TRAVEL TIME



Domestic



GUIDED FISHING EXPERIENCE: BOOKING BEHAVIOURS

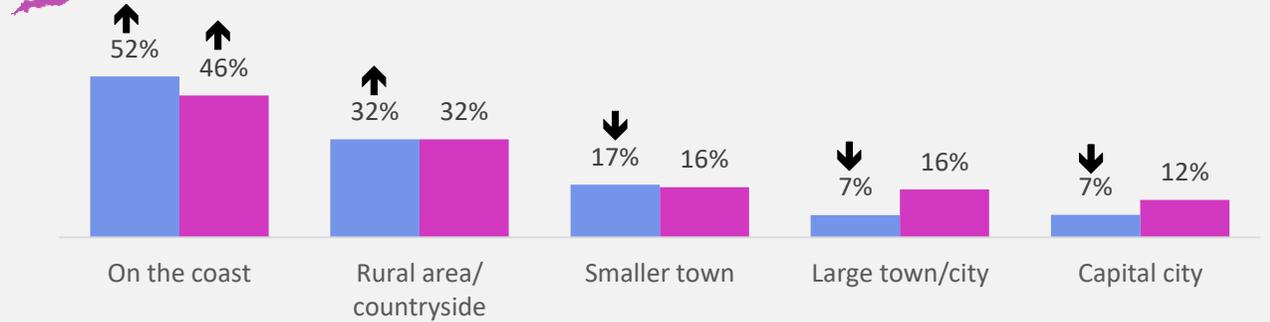
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RESEARCH CHANNELS

	Inbound	UK
General internet search	32%	36%
Traveller Review Site	23%	19%

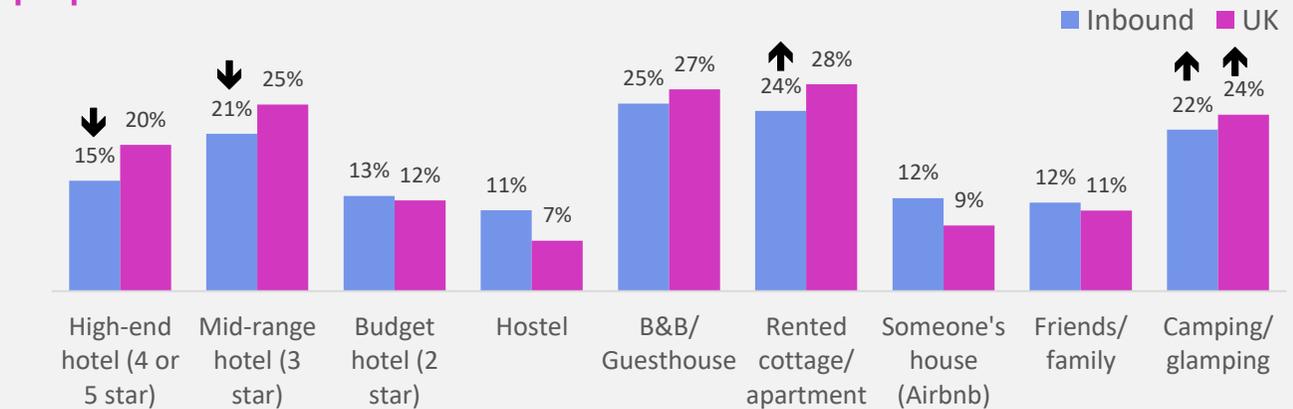
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	58%	68%
Booked in destination	32%	23%

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



GUIDED FISHING EXPERIENCE: GO TO MARKET CHECKLIST

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Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Low	Would need clear links to England – native species, English dishes etc.
Current country ownership of the experience	Not England	More ‘dramatic’ seascapes to compete with – Canada, Norway etc.
Provide enrichment , fun, challenge or learning	Low	Needs clear positioning to be understood as fun or learning experience
Create distinctive memories to keep and share	Yes	Can provide a travel group with shared memories
Provide cultural or historical immersion	No	Not essential for this activity, unless there is a connection to past methods of fishing, cooking etc.
Expert-led or self-guided option	Expert-led	Both from a fishing and cooking perspective
Need to mitigate for the weather	Yes	Experience is at risk of cancellation at short notice (collaboration with other nearby less weather-dependent activities)
Established, known and understood experience	Yes	Fishing is known, but the exact nature of the experience needs clear communication
Accessing the target audience	Male	Decision maker may well be male
Bookable product	Yes	As part of a coastal-location holiday
Local promotion and in-destination bookings	Yes	Traveller reviews are important in the decision making process
Acceptable journey times	High	People are willing to travel further to this experience, perhaps because they are not sure what else would be close by
Fixed duration or variable length activity	Fixed	A full day experience is expected
Packaging with other activities	Yes	Broad accommodation preferences suggest inclusion in outdoor activity package or tour