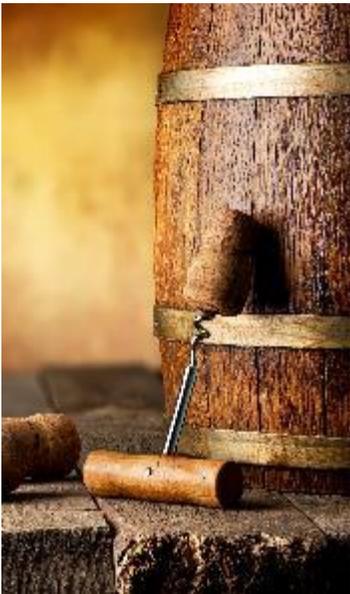


# Street Art Experience – Meet the street artists and have a go yourself at a wall mural

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# 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	★★★★☆

# STREET ART: SUMMARY

MEET THE STREET ARTISTS AND HAVE A GO YOURSELF AT A WALL MURAL



## EXPERIENCE SCORECARD METRICS\*

Star rating – low to high

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

## DEMOGRAPHIC SKEWS

- + Under 35s
- + BuzzSeekers (Inbound)
- + With friends

## Other Niche Experiences (included in the research)

- Foraging experience
- Fossil hunting
- Guided fishing experience



## ENGLAND APPEAL

- Relatively niche interest, with a much **lower interest in Sweden and the domestic market**
- **UK** does have some awareness for street art, presumably through Banksy and regional promotion e.g. Birmingham, Bristol etc.
- An urban activity to be combined with **experiencing city life** and **shopping**



## CHALLENGES

- Seen as an **experience that would be done in the capital city**. Strong promotion of other towns and cities to drive visitors to regional England
- **Not necessarily seen as an expert-led** experience. Communication of the hands-on nature of the experience may sit alongside a walking tour of existing street art



## OPPORTUNITIES

- Appeals to a **young audience**, so can be used to promote the **more youthful, vibrant** image of England and illustrate the **diversity** of English culture
- For the domestic audience it can **influence holiday destination**, so packaging with other experiences that appeal to similar audiences could drive regional footfall



VisitEngland

\* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# STREET ART: EXPERIENCE SCORECARD METRICS

MEET THE STREET ARTISTS AND HAVE A GO YOURSELF AT A WALL MURAL



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	41%	23	
<i>All Inbound Markets</i>	45%	15	100%
<b>Australia</b>	47%	17	6%
<b>China</b>	71%	16	4%
<b>Germany</b>	38%	13	15%
<b>Spain</b>	44%	13	12%
<b>France</b>	43%	13	18%
<b>Italy</b>	48%	10	10%
<b>Netherlands</b>	24%	16	5%
<b>Norway</b>	29%	18	2%
<b>Sweden</b>	26%	22	3%
<b>United States</b>	61%	12	27%

\* Based on IPS 2017 FY data

Indicates where ranking is

- lower (+4 from inbound markets)
- higher (-4 from inbound markets)

## ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	15% ↓	15%
Other countries have better experiences	16% ↓	20% ↑

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



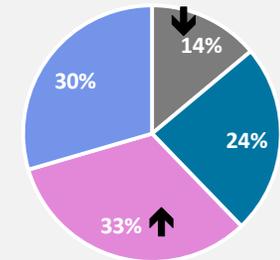
## CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	11%	20%
<b>AUTHENTIC</b> to England	16%	18%
Immerse in <b>CULTURE / HISTORY</b>	24% ↑	22%
Create distinctive <b>MEMORIES</b>	27%	24%
<b>CHALLENGE</b> - Something they can't do at home	19%	25%

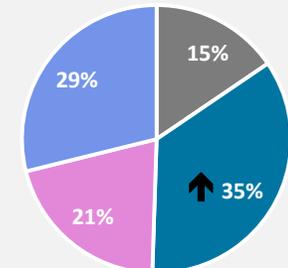
## INFLUENCE ON HOLIDAY DECISION

**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

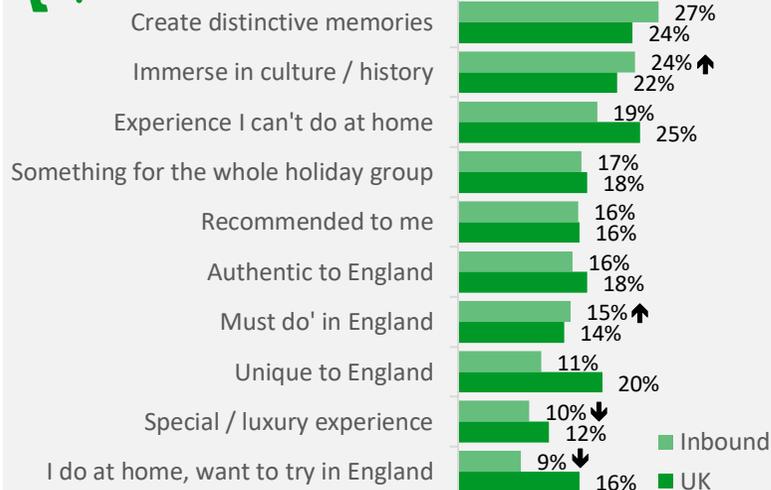


# STREET ART: OPTIMISING THE POTENTIAL



## MEET THE STREET ARTISTS AND HAVE A GO YOURSELF AT A WALL MURAL

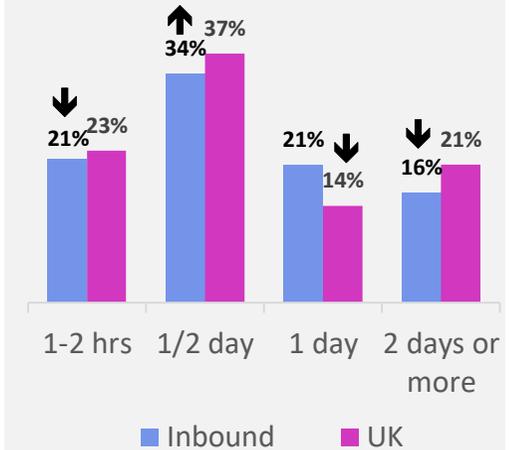
### MESSAGES TO AMPLIFY



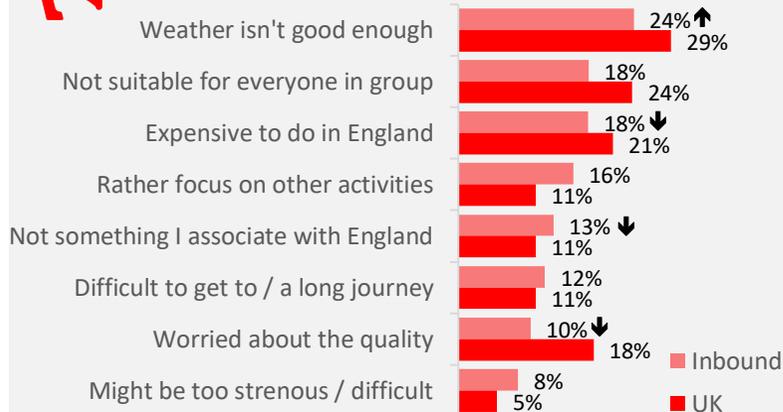
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Experiencing City Life – 45%	Experiencing City Life – 37%
Shopping – 31%	Shopping – 26%
<b>Other experiences of interest</b>	
Street food tour & tasting – 87%	Street food tour & tasting – 91%
'Life behind the scenes' – 84%	'Life behind the scenes' – 90%

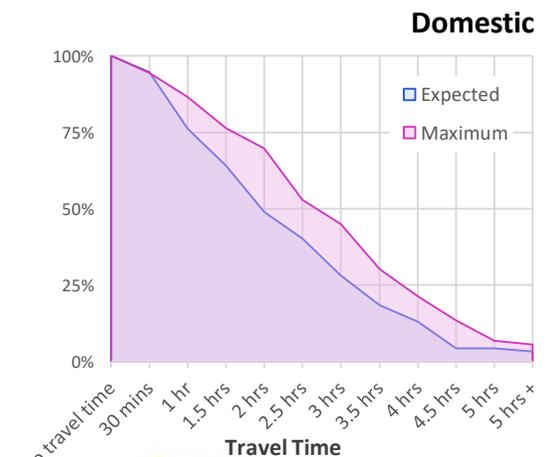
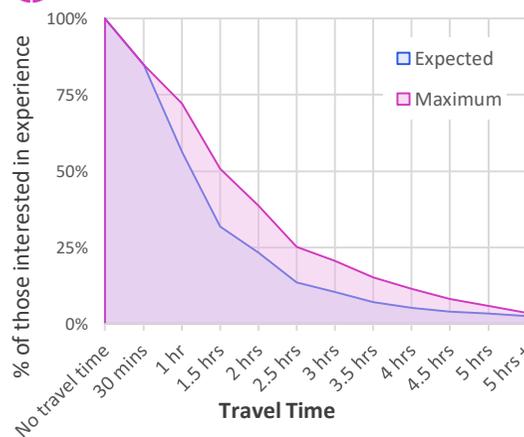
### EXPERIENCE DURATION



### BARRIERS TO ADDRESS



### TRAVEL TIME



# STREET ART: BOOKING BEHAVIOURS

MEET THE STREET ARTISTS AND HAVE A GO YOURSELF AT A WALL MURAL

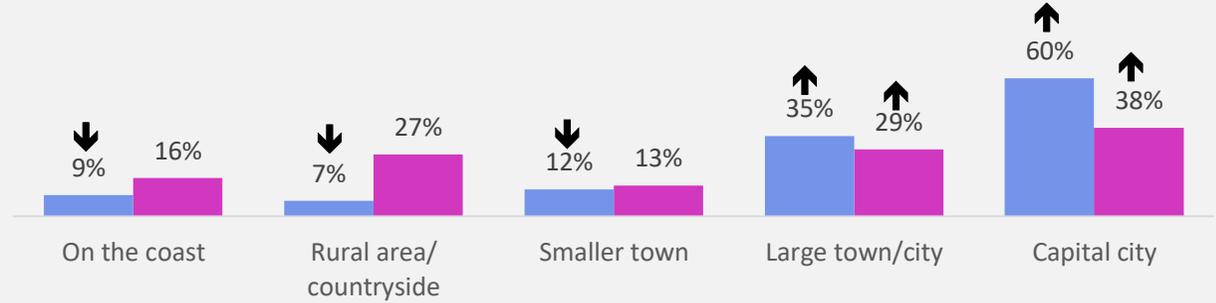


## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>37%</b>	<b>30% ↓</b>
Traveller Review Site	<b>28%</b>	<b>24%</b>
Social Media*	<b>20% ↑</b>	<b>14%</b>

\* Outside the top three but over-indexes compared to other experiences

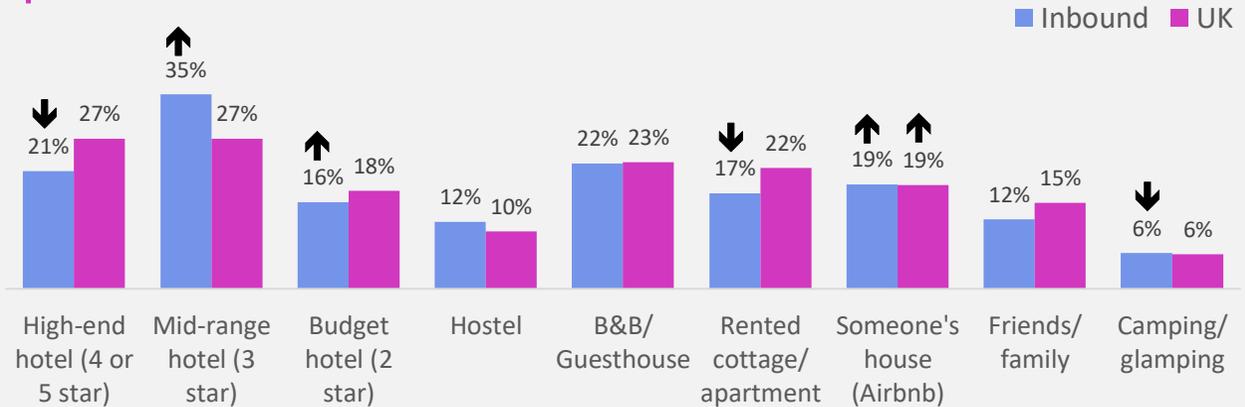
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>49% ↓</b>	<b>58%</b>
Booked in destination	<b>35% ↑</b>	<b>29%</b>

## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# STREET ART: GO TO MARKET CHECKLIST



## MEET THE STREET ARTISTS AND HAVE A GO YOURSELF AT A WALL MURAL

Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Yes	England is known for street art, though the authentic view of England it presents may be different to that provided by other experiences
Current <b>country ownership</b> of the experience	None	Offered in many countries, though England is strong
Provide <b>enrichment</b> , fun, challenge or learning	Potential	The extent to which the experience is passive observation vs active involvement will influence
Create <b>distinctive memories</b> to keep and share	Potential	Again the degree of active involvement will impact, taking part and meeting artists is more likely to create memories
Provide <b>cultural or historical immersion</b>	Potential	21 <sup>st</sup> century culture and history
<b>Expert-led</b> or self-guided option	Either	Expert-led interactive bookable product or self-guided activity
Need to mitigate for the <b>weather</b>	Yes	Meet the artists and 'have-a-go' sessions could be indoors
<b>Established, known</b> and <b>understood</b> experience	Limited	Outside of festivals, perhaps not yet an established tourist activity
Accessing the <b>target audience</b>	Young	Consider communication channels to reach target audience
<b>Bookable product</b>	Potential	For the immersive experience
Local promotion and <b>in-destination bookings</b>	Potential	For self-guided options
Acceptable <b>journey times</b>	Mixed	Short for inbound, domestic travellers may be motivated to travel to a street art destination
<b>Fixed duration</b> or <b>variable length</b> activity	½ day	Options for longer immersive experiences could provided
<b>Packaging</b> with other activities	Potential	Other modern arts and culture activities – festivals, concerts etc.



Source: Experiences Research 2019

