

## Photography Class – Learn how to photograph wildlife, scenery or architecture with an expert

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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	★★★★☆

# PHOTOGRAPHY CLASS: SUMMARY

LEARN HOW TO PHOTOGRAPH WILDLIFE, SCENERY OR ARCHITECTURE WITH AN EXPERT



## EXPERIENCE SCORECARD METRICS\*

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

**DEMOGRAPHIC SKEWS**

- + Male
- + BuzzSeekers, (Inbound)
- + Solo activity

**Other Skill Based Learning Experiences**  
(included in the research)

- Shadowing experience
- Authentic craft workshop

## ENGLAND APPEAL

- Photography is a **common interest**, and a good fit with holiday needs such as **sightseeing, exploring and creating memories**. This experience provides an immersion into the **local history, culture or landscape**
- It can provide an opportunity to **explore ‘unseen’ things**, either at an unusual time or through a **‘behind the scenes’** tour, perhaps with an expert guide alongside the photography instructor

## CHALLENGES

- It is seen as a **solo activity** and so will appeal to independent travellers. Broadening the appeal through more beginner courses may increase potential
- **Weather** maybe a barrier for outdoor courses. However, it could also be seen as a potential opportunity.

## OPPORTUNITIES

- **Various course lengths** could be offered to meet different needs. Options for **family-orientated courses** would widen the appeal
- Interest in **many areas of the country from London to the coast**, so can be offered anywhere. Potential for several courses in different parts of the country to be linked



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

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# PHOTOGRAPHY CLASS: 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*
<b>UK (Domestic)</b>	61%	9	
<i>All Inbound Markets</i>	52%	9	100%
<b>Australia</b>	54%	10	6%
<b>China</b>	80%	7	4%
<b>Germany</b>	42%	11	14%
<b>Spain</b>	55%	8	13%
<b>France</b>	46%	9	17%
<b>Italy</b>	55%	7	10%
<b>Netherlands</b>	38%	6	7%
<b>Norway</b>	38%	11	2%
<b>Sweden</b>	36%	10	3%
<b>United States</b>	59%	13	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	16% ↓	11%
Other countries have better experiences	12% ↓	8%

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



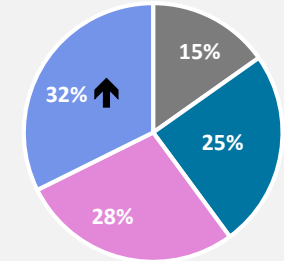
## CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	8% ↓	9%
<b>AUTHENTIC</b> to England	10% ↓	13%
Immerse in <b>CULTURE / HISTORY</b>	20% ↑	11%
Create distinctive <b>MEMORIES</b>	29% ↑	30%
<b>CHALLENGE</b> - Something they can't do at home	14%	17%

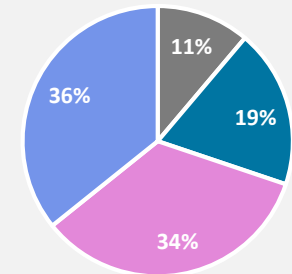
## INFLUENCE ON HOLIDAY DECISION

### 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



# PHOTOGRAPHY CLASS: EXPERIENCE SCORECARD METRICS

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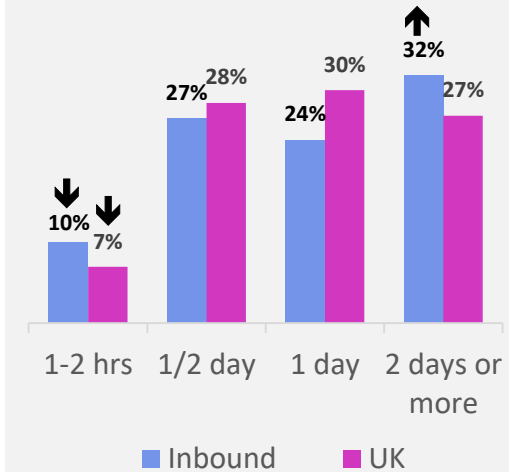
## MESSAGES TO AMPLIFY



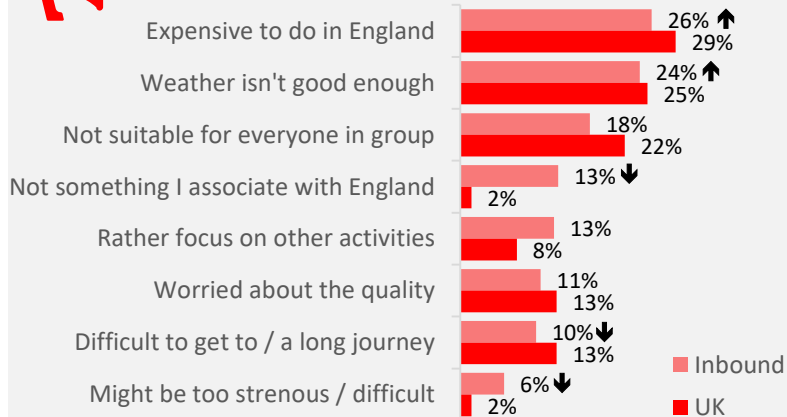
## CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Visiting famous / iconic places – 38%	Experiencing rural life & scenery – 41%
Exploring history / heritage - 36%	Visiting famous / iconic places – 35%
<b>Other experiences of interest</b>	
Guided nature experience – 83%	'Life behind the scenes' – 85%
Street food tour & tasting – 83%	Guided nature experience – 84%

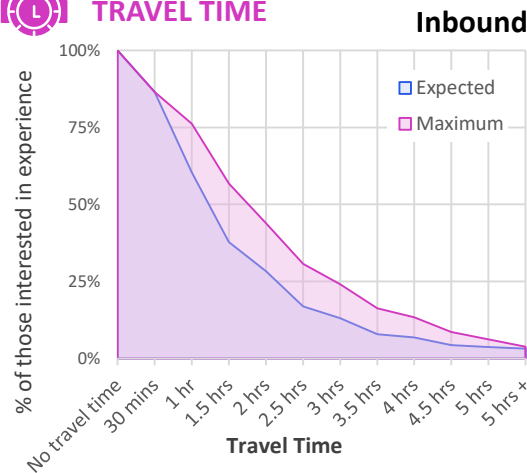
## EXPERIENCE DURATION



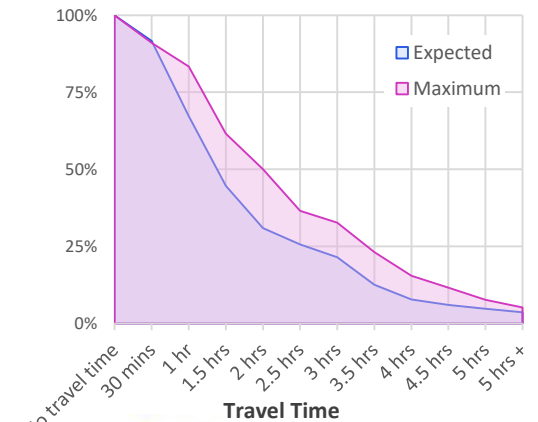
## BARRIERS TO ADDRESS



## TRAVEL TIME



## Domestic



# PHOTOGRAPHY CLASS: BOOKING BEHAVIOURS

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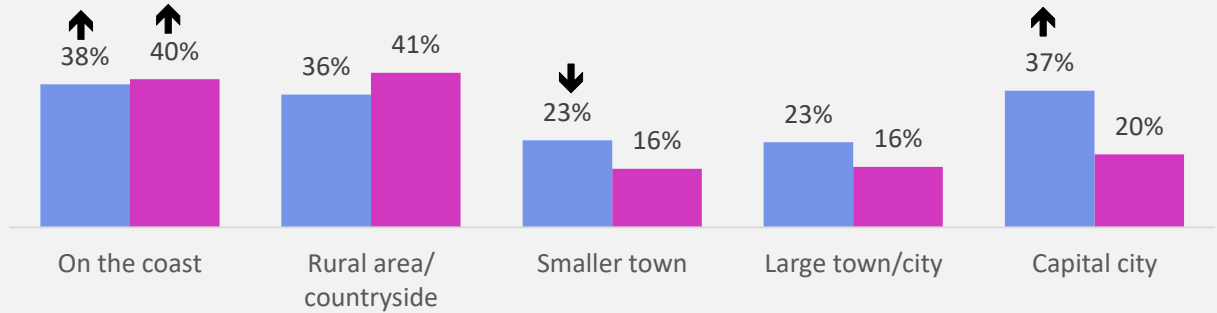


## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>39% ↑</b>	<b>49%</b>
Traveller Review Site	<b>25%</b>	<b>25%</b>



## LOCATION TYPE

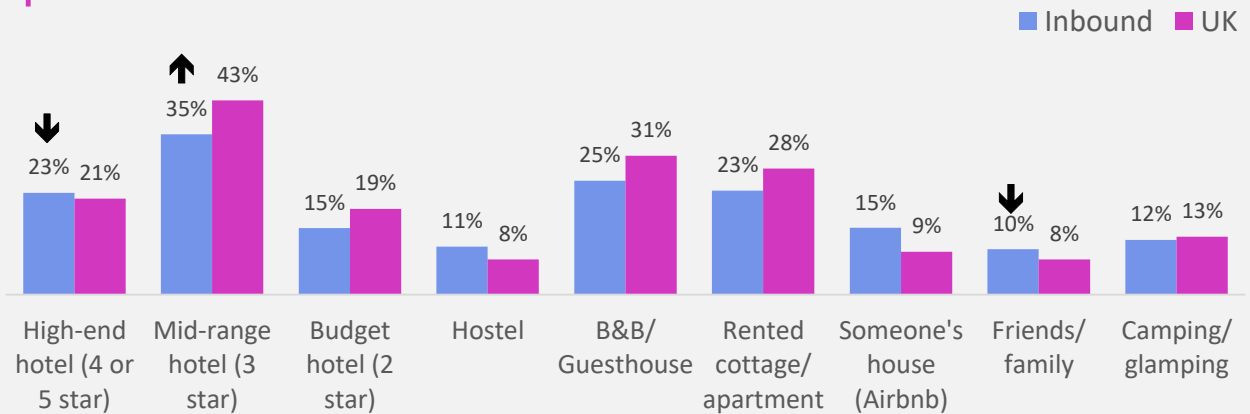


## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>58%</b>	<b>69%</b>
Booked in destination	<b>29%</b>	<b>17%</b>



## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly worse than other experiences



# PHOTOGRAPHY CLASS: GO TO MARKET CHECKLIST

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Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Yes	A popular activity that would be unique to the location
Current <b>country ownership</b> of the experience	None	Can be owned by many countries as the places photographed are unique to that country
Provide <b>enrichment</b> , fun, challenge or learning	Yes	Depending on the targeting of the course
Create <b>distinctive memories</b> to keep and share	Yes	An opportunity to create lasting memories, potentially through private access to public locations
Provide <b>cultural</b> or <b>historical immersion</b>	Yes	The places photographed provide this link, particularly if supported with a guide as well as a photography instructor
<b>Expert-led</b> or self-guided option	Expert-led	The more personalised the course the greater the opportunity for price-premium
Need to mitigate for the <b>weather</b>	Yes	Indoor and outdoor options within the same course and/or make the weather a feature of the course
<b>Established, known</b> and <b>understood</b> experience	Yes	For both amateur and expert photographers
Accessing the <b>target audience</b>	Male, Alone	Currently seen as an experience for photographers. Could potentially be made accessible to a more amateur audience and as a group activity
<b>Bookable product</b>	Yes	Many see this as a 2 day+ course and so a significant part of the holiday. Coastal locations are popular
Local promotion and <b>in-destination bookings</b>	Yes	Shorter course for beginners/casual photographers
Acceptable <b>journey times</b>	Up to 2 hrs	There is a recognition that this activity will be in specific locations
<b>Fixed duration</b> or <b>variable length</b> activity	Variable	Expected to be a minimum of ½ day. Offer options to vary course length
<b>Packaging</b> with other activities	Tour	Combining the course with visits to iconic places; landscape and buildings