

## Shadowing Experience – Go out with a park ranger as they care for the landscape

---



# 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	★★★★☆

# SHADOWING EXPERIENCE: SUMMARY

GO OUT WITH A PARK RANGER AS THEY CARE FOR THE LANDSCAPE



## EXPERIENCE SCORECARD METRICS\*

Star rating – low to high

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

## DEMOGRAPHIC SKEWS

- + over 55s
- + Male
- + BuzzSeekers, Explorers (Inbound)

## Other Skill Based Learning Experiences

(included in the research)

- Photography class
- Authentic craft workshop



## ENGLAND APPEAL

- Has potential to appeal in England. The generic description does not align it to a particular country
- A specific experience can be made authentic to England
- Individual experiences will appeal to different audiences



## CHALLENGES

- An **unfamiliar** concept to many so needs clear explanation and strong promotion
- Mitigating for the **weather** will be important for apparently outdoor experiences
- Considerable variation in appeal across markets; main opportunities appear to be inbound from northern Europe
- It is important to communicate the 'fun' element to avoid it being seen as a 'work experience'



## OPPORTUNITIES

- Can provide **cultural, authentic** immersion – **meeting** the **people** and seeing how they live
- No country owns the overall concept so can be made unique to England
- There is a willingness to travel further to a compelling Shadowing experience proposition than for many other experiences



VisitEngland

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

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# SHADOWING EXPERIENCE: EXPERIENCE SCORECARD METRICS



GO OUT WITH A PARK RANGER AS THEY CARE FOR THE LANDSCAPE

ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	57%	15	
All Inbound Markets	49%	11	100%
Australia	47%	16	5%
China	69%	20	3%
Germany	45%	8	15%
Spain	55%	7	13%
France	61%	4	23%
Italy	43%	14	8%
Netherlands	40%	5	7%
Norway	21%	24	1%
Sweden	31%	14	3%
United States	55%	16	22%

\* 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	19%	13%
Other countries have better experiences	16%	15%

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

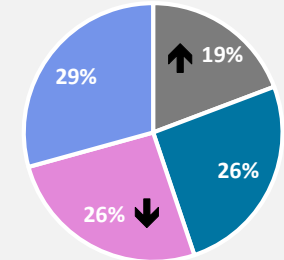
## CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	12%	16%
AUTHENTIC to England	15%	13%
Immerse in CULTURE / HISTORY	24% ↑	16%
Create distinctive MEMORIES	27%	18%
CHALLENGE - Something they can't do at home	18%	23%

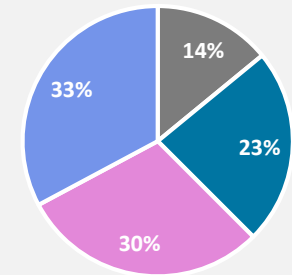
## INFLUENCE ON HOLIDAY DECISION

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

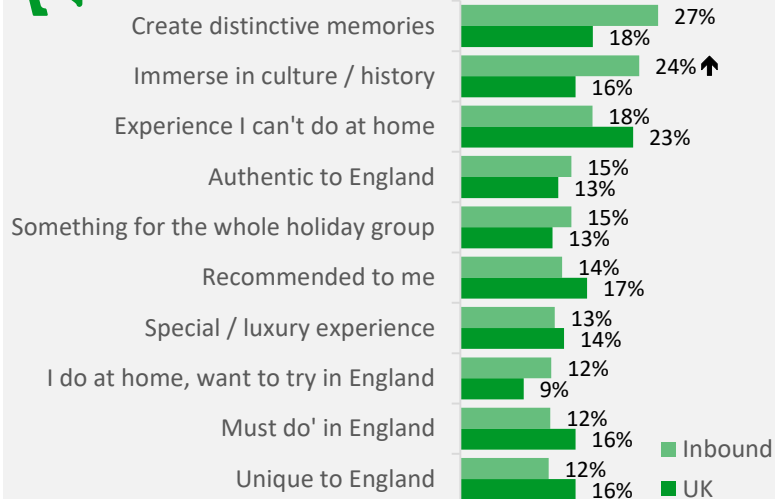


# SHADOWING EXPERIENCE: OPTIMISING THE POTENTIAL



## GO OUT WITH A PARK RANGER AS THEY CARE FOR THE LANDSCAPE

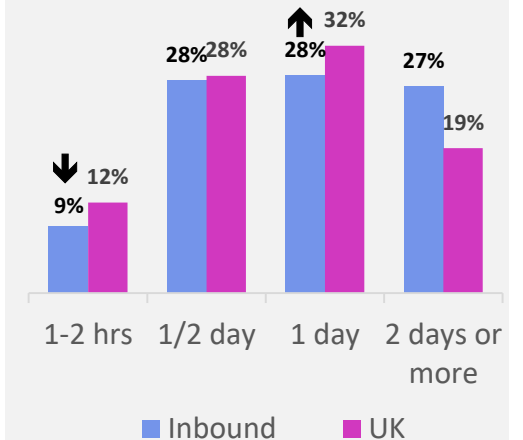
### MESSAGES TO AMPLIFY



### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Experiencing rural life / scenery – 36%	Exploring history and heritage – 27%
Exploring history and heritage – 31%	Experiencing rural life / scenery – 26%
<b>Other experiences of interest</b>	
Guided nature experience – 89%	'Life behind the scenes' – 88%
'Life behind the scenes' – 85%	Guided nature experience – 87%

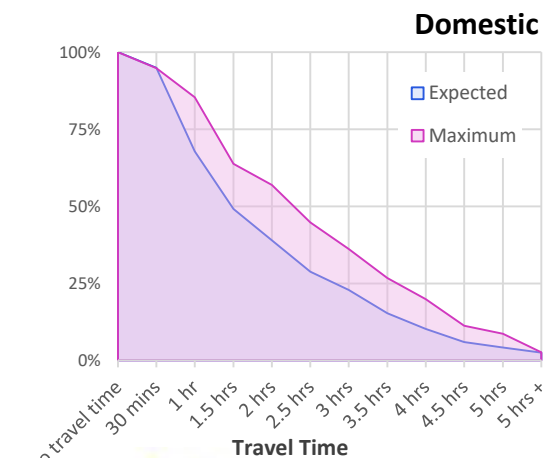
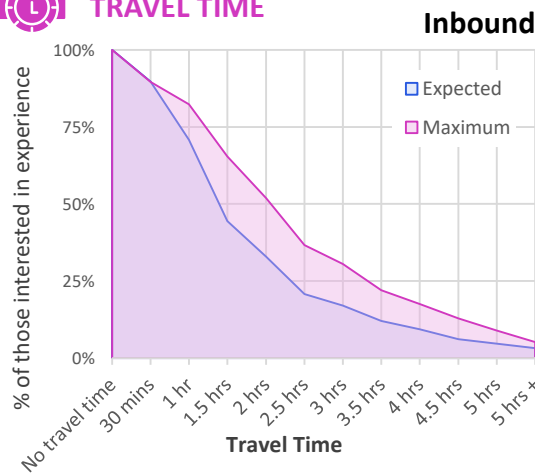
### EXPERIENCE DURATION



### BARRIERS TO ADDRESS



### TRAVEL TIME





# SHADOWING EXPERIENCE: BOOKING BEHAVIOURS

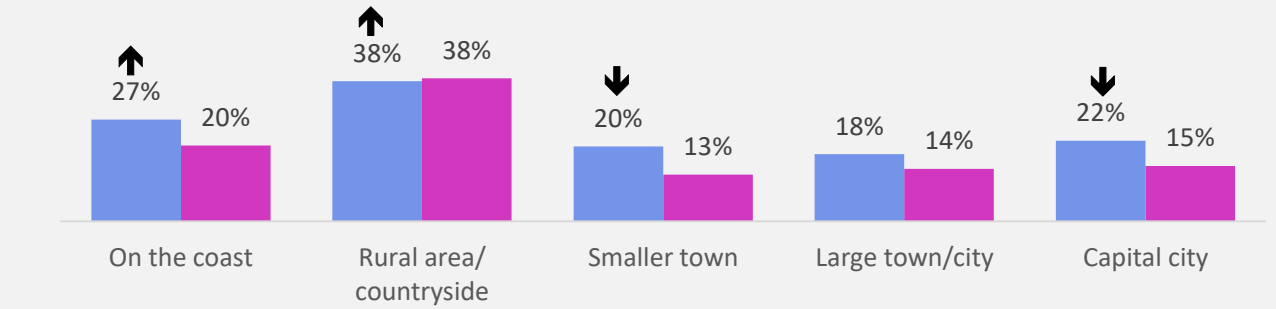
GO OUT WITH A PARK RANGER AS THEY CARE FOR THE LANDSCAPE



## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>32%</b>	<b>41%</b>
Tourism Office	<b>24% ↑</b>	<b>23%</b>
Travel Guidebook	<b>24%</b>	<b>22%</b>

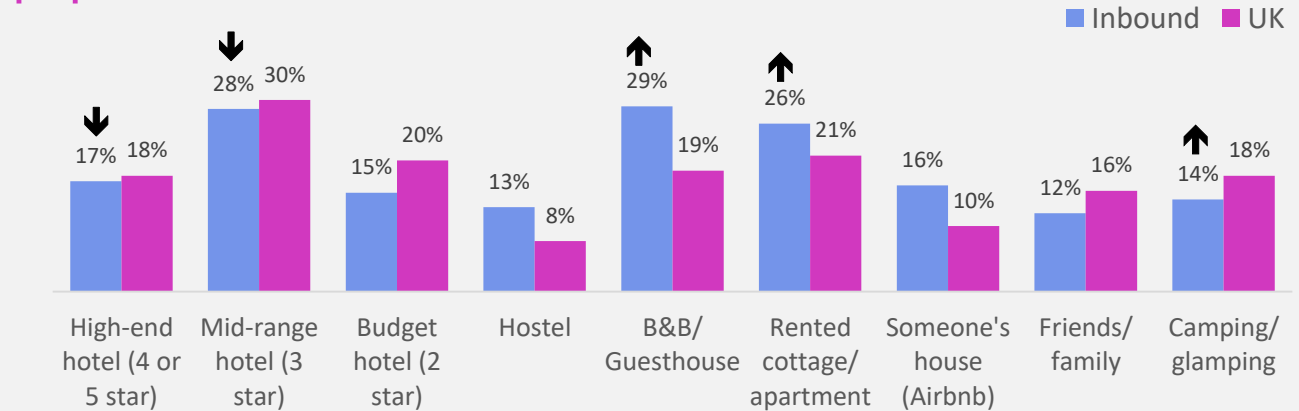
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>58%</b>	<b>69%</b>
Booked in destination	<b>28%</b>	<b>18%</b>

## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# SHADOWING EXPERIENCE: GO TO MARKET CHECKLIST

GO OUT WITH A PARK RANGER AS THEY CARE FOR THE LANDSCAPE



Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Strong	Clear linkage of the experience to unique English assets – people, activities, landscape etc.
Current <b>country ownership</b> of the experience	None	The generic concept does not belong to any one country, opportunity for England to own specific shadowing experiences
Provide <b>enrichment</b> , fun, challenge or learning	Caution	Important to make sure the experience is not too work-like
Create <b>distinctive memories</b> to keep and share	High	Potential to create shared memories through small group experiences
Provide <b>cultural</b> or <b>historical immersion</b>	High	Potential to be the primary hook for many shadowing experiences
<b>Expert-led</b> or self-guided option	Expert	By definition this is an expert-led experience, poor guiding would be damaging
Need to mitigate for the <b>weather</b>	Yes	Outdoor shadowing would need bad weather alternatives
<b>Established, known</b> and <b>understood</b> experience	No	Individual experiences will need strong and clear communication
Accessing the <b>target audience</b>	Variable	Each shadowing experience will have it's own specific audience that will need to be identified and targeted
<b>Bookable product</b>	Yes	Potential to be a pre-booked experience
Local promotion and <b>in-destination bookings</b>	Yes	Can be successfully promoted in-destination
Acceptable <b>journey times</b>	High	Willingness to travel for the 'right' experience, can add to appeal of rural England
<b>Fixed duration</b> or <b>variable length</b> activity	Variable	Duration should be appropriate for the experience, typically 1/2 to 1 day
<b>Packaging</b> with other activities	Learning	Other learning and/or other rural authentic experiences