

Volunteering or Working Holiday – Spend time helping restore or preserve a historic site



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	★★★★☆

EXPERIENCE SCORECARD METRICS*

Star rating – low to high

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

DEMOGRAPHIC SKEWS

- + Males (inbound)
- + BuzzSeekers (Inbound)
- + Solo activity

Similar Experiences (included in the research)

- Seen as a multi-day activity so not similar to other experiences tested



ENGLAND APPEAL

- Sounds like a **noble** thing to, opportunity to **give back and help**. Chance for **personal growth**, learning new skills meeting new people



CHALLENGES

- Danger of seeming **too much like being at work/** not being aligned with leisure, so careful communication of enjoyment/relaxation/fun may be important
- **Low cost accommodation** is expected by many so may impact on pricing of the experience
- It is seen as something to be done alone or at least, not suitable for everyone in the group so may have reduced potential as a family/group holiday activity



OPPORTUNITIES

- Great opportunity to immerse in local **culture and history** and of interest to those who want to explore history and heritage
- The extended duration mean it is likely to be **booked in advance** and will **drive destination choice**



VOLUNTEERING / WORKING HOLIDAY: SCORECARD METRICS

SPEND TIME HELPING TO RESTORE / PRESERVE A HISTORIC SITE



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	53%	18	
<i>All Inbound Markets</i>	40%	19	100%
Australia	46%	19	7%
China	69%	19	4%
Germany	27%	24	12%
Spain	38%	20	12%
France	32%	22	16%
Italy	42%	16	10%
Netherlands	21%	18	5%
Norway	30%	15	3%
Sweden	26%	19	3%
United States	55%	17	29%

* 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	21%	13%
Other countries have better experiences	19%	11%

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



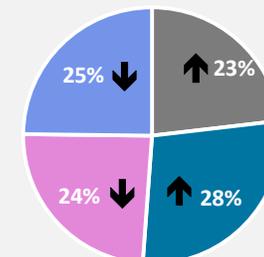
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	12%	13%
AUTHENTIC to England	13%	18%
Immerse in CULTURE / HISTORY	23% ↑	26% ↑
Create distinctive MEMORIES	25%	25%
CHALLENGE - Something they can't do at home	20%	26%

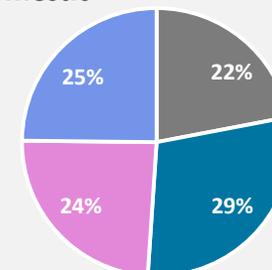
INFLUENCE ON HOLIDAY DECISION

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



VOLUNTEERING HOLIDAY: OPTIMISING THE POTENTIAL



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MESSAGES TO AMPLIFY



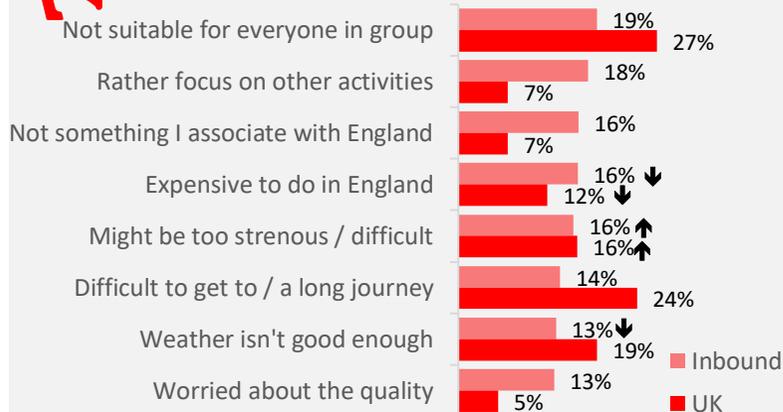
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Exploring history & heritage – 26%	Experiencing rural life / scenery – 30%
Experiencing rural life / scenery – 23%	Exploring history & heritage – 30%
Other experiences of interest	
'Life behind the scenes' – 87%	'Life behind the scenes' – 86%
Guided nature experience – 86%	Guided nature experience – 85%

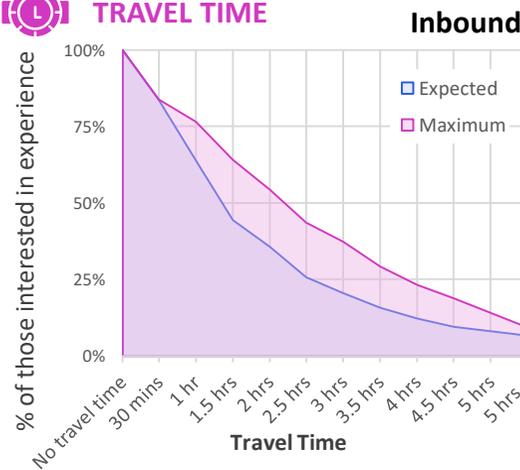
EXPERIENCE DURATION



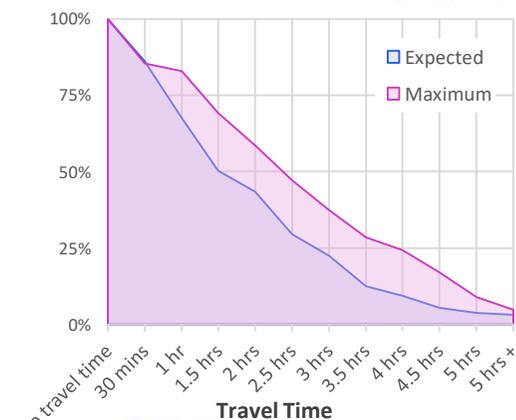
BARRIERS TO ADDRESS



TRAVEL TIME



Domestic



VOLUNTEERING / WORKING HOLIDAY: BOOKING BEHAVIOURS

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RESEARCH CHANNELS

	Inbound	UK
General internet search	32%	49%
From friends / family	23% ↑	26%
Traveller review sites	21%	21%

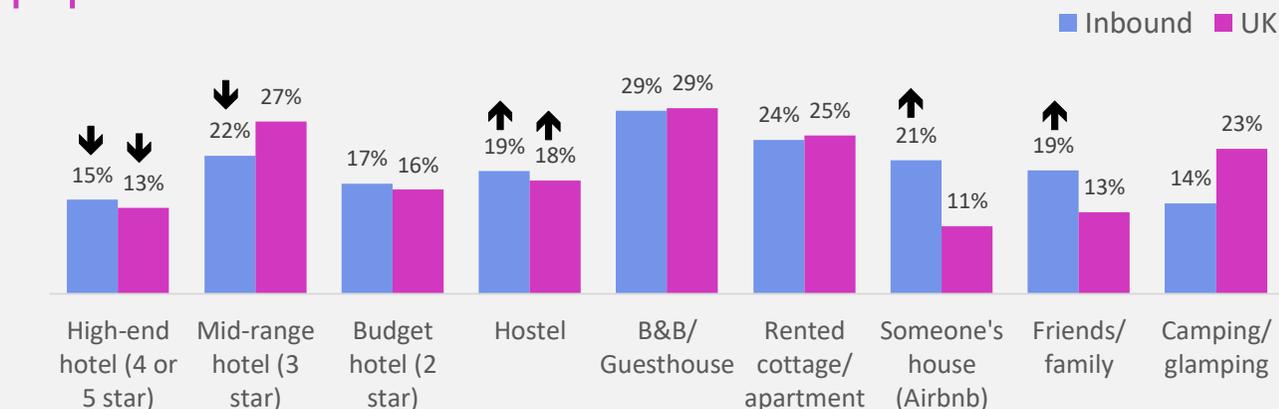
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	69% ↑	73%
Booked in destination	17% ↓	16%

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



VOLUNTEERING HOLIDAY: GO TO MARKET CHECKLIST

SPEND TIME HELPING TO RESTORE / PRESERVE A HISTORIC SITE



Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Yes	Driven by the location
Current country ownership of the experience	None	Unique to the individual country
Provide enrichment , fun, challenge or learning	Potential	Care in communication to not sound too much like 'work'
Create distinctive memories to keep and share	Yes	Though if done alone they will be personal rather than shared memories
Provide cultural or historical immersion	Yes	At the heart of this type of experience
Expert-led or self-guided option	Expert-led	Both in the skills needed and the history/context
Need to mitigate for the weather	Potentially	Dependent on the experience and the location. Provide weather-proof options/alternatives
Established, known and understood experience	Yes	Some scepticism around 'volunteering' but concept is understood
Accessing the target audience	Solo	Clear communication of the experience and target the 'right' audience
Bookable product	Yes	As longer duration, pre-booking is expected, personal recommendation is important
Local promotion and in-destination bookings	Limited	Only short volunteering activities would be booked locally
Acceptable journey times	Long	As people would stay on site they are willing to travel further to it
Fixed duration or variable length activity	2 days+	Generally assumed to be multi-day, but could offer variable options
Packaging with other activities	No	This appears to be a stand-alone activity, though could be part of a longer tour of regional England



Source: Experiences Research 2019

