Experiential Activities

Discover England Fund Research
Insight Analysis

June 2019

VisitEngland

Source: Experiences Research 2019

brio research and consulting

Contents

This report is accompanied by individual dashboards for each country and for each experience

Source: Experiences Research 2019

Background, objectives, research method

Source: Experiences Research 2019

Background: Experiential travel, an area of opportunity for England

Experiential travel is an increasingly important. Global trends reflect the desire among travellers to have authentic, immersive experiences, that combine fun with the opportunity to learn

Future Traveller Trend

The Pursuit of Real

Genuine, authentic tourism products are preferred by future travellers as they seek to get rid of their "tourist" stamp and experience their destination like a local instead.

*"When I go on holiday, the most important thing for me is to **experience the authentic culture** of a place"*

Source: The Future Travel Journey

Future Traveller Trend

The Leisure Upgrade

Skill seeking future travellers will prefer tourism products that combine fun and an opportunity to learn

*"Entertainment should be about **learning new things** as much as simply having fun"*

*"Don't put everything into a glass box and expect people to come. Cultural heritage is all about people. Culture is no longer dead, **the cultural is alive and that experience economy is driving everything**".*

IAN YEOMAN, TOURISM FUTURIST

Key objective:
DEF wishes to understand the nature of experiential activities in three key areas: wellness, food and drink and learning. They need to understand the drivers and barriers to participating in these activities and the potential role England could play in offering these products and services.

Two-part research study:

1) Exploratory Qualitative to assess consumer perceptions for experiential activities

2) Detailed Quantitative Study to define and measure the opportunity for individual experiences

This report focuses primarily on the **quantitative research,** drawing on the **qualitative insights** to add interpretation and depth

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Methodology: Phase 1 – Qualitative Headlines

In December 2018 kubi kalloo conducted the first of a two-part research study which used exploratory qualitative research to assess consumer perceptions of visiting England for experiential activities

Methodology:

Online qualitative research in Germany, US and Australia with people who have participated in experiential activities (half of them in England)

Findings:

Opportunity – Breadth of Experiential Activities

The portfolio of experiential activities tested provide something for (almost) everyone.

This research highlights the breadth of activities:

- Widely available (non-expert) mainstream e.g. Spa experience
- Experiences being re-imagined as holiday activities e.g. Baking school
- Emerging experiences that speak to wider consumer trends e.g. Foraging experience linking to sustainability, vegan diets etc.

Emotional Drivers impacting appeal

CHALLENGE

- ✓ A sense of excitement/ newness/ freshness
- ✓ Push oneself out of comfort zone

CONNECT

- ✓ Connect with local authentic culture
  Meaningful experience
- ✓ Take something back home

PAMPER

- ✓ Feeling of luxury, being spoilt and pampered

Hypothesise put forward from 3 market qualitative research

1. Experiential activities have the power to significantly increase the value of holidays in England for both tourists and tourism
2. Experiential activities can expand and develop holiday plans within England
3. Experiential activities can draw people to more / different locations

kubi kalloo

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Methodology: Phase 2 – Quantitative Methodology

Deep understanding of the scale and nature of the opportunity for experiential activities in England, both as product opportunities and potential drivers of Inbound and Domestic leisure travel growth

Methodology:

Online fieldwork January/February 2019
All sample non-rejectors of holiday travel to England, further market specific screening as shown below:

Domestic leisure travellers:
1000 interviews
Take leisure holidays/breaks of 2+ nights in England

Research Focus Areas:

- What is the opportunity for experiential activities in England?
- What are the drivers for doing experiential activities in England?
- What are the barriers / challenges and how do we overcome them?
- What does the ideal 'experiential' travel product look like?
- What is the optimal go-to-market strategy?

Inbound leisure travellers: 10 Markets

Australia	China	Germany	Spain	France	Italy	Netherlands	Norway	Sweden	US
1000 interviews	1000 interviews	1001 interviews	1002 interviews	1004 interviews	1011 interviews	1001 interviews	500 interviews	500 interviews	1003 interviews
Long-haul leisure travellers	Long-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Short-haul leisure travellers	Long-haul leisure travellers

24 experiential activities were tested in this survey

- A short description was given to provide clarity about the experience*
- Previous research has been carried out by VisitEngland focusing on sports and outdoor activities and so these are not included in this project.

Source: Experiences Research 2019

Overview of the experiences sector

Source: Experiences Research 2019

Participation and interest in experiential activities on any overseas holiday

High levels of interest exist across International markets for participating in experiential activities whilst on holiday (any destination). Less than 1% suggesting they have no interest in any of the activities tested

HIGH INTEREST EXPERIENCES

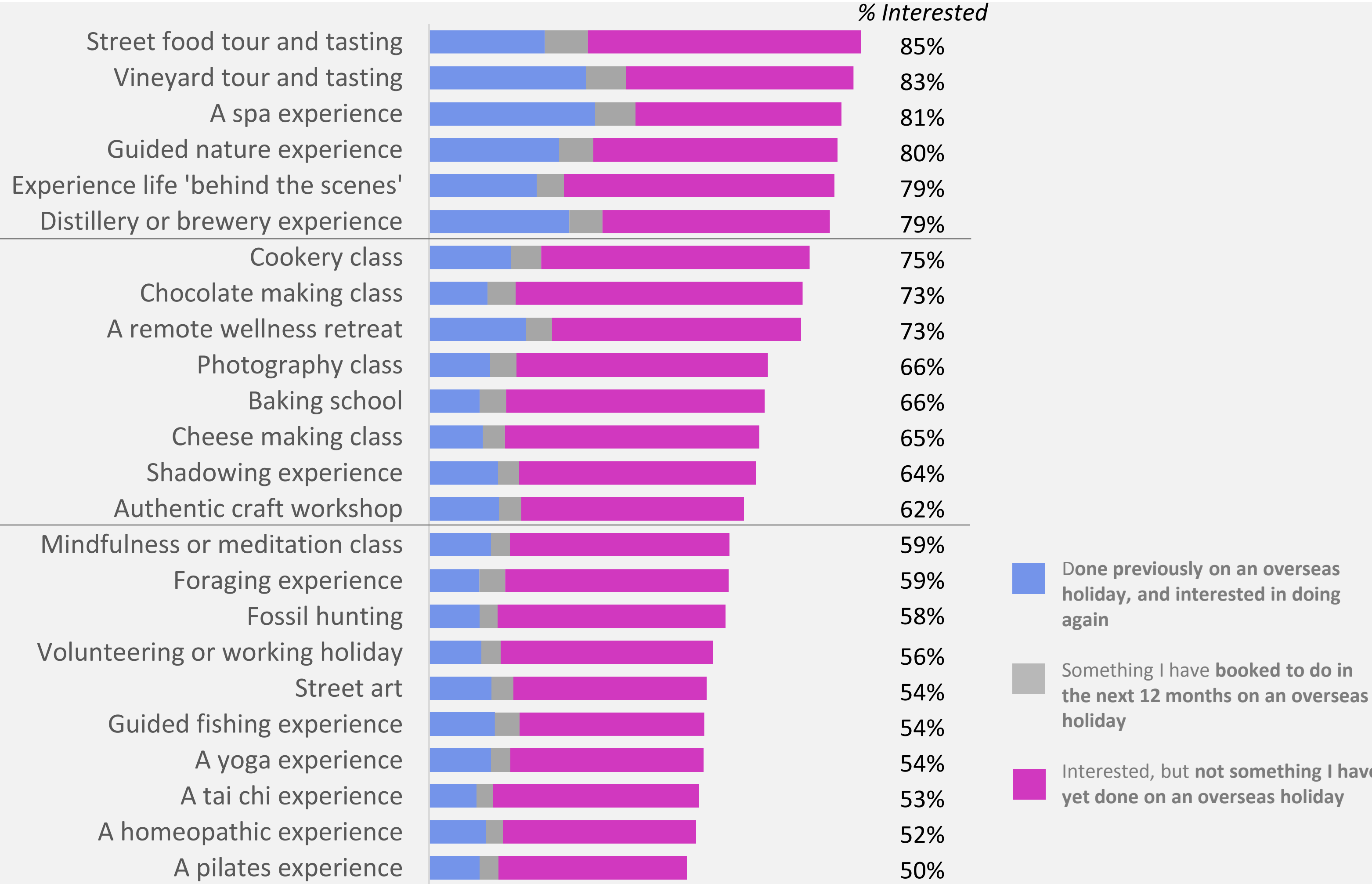
Mainstream experiences, that don't necessarily need expert immersive guiding

MID-RANGE INTEREST

Many of the food and drink and skill based learning experiences fall into this category

NICHE INTEREST

Many of the wellness experiences fall into this category



Question:B1/B2/B3. Which of the following statements best describes your general interest in or participation in the following types of experiences, whilst on an overseas holiday or short break.

Base: All interested in one or more experience, Inbound Markets only n=9022

Source: Experiences Research 2019

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Participation and interest in experiential activities on any overseas holiday – rank order

Participation / interest in experiential activities shows a high level of consistency across all the inbound markets. Variations such as for Shadowing and Foraging may be impacted by understanding of the concept

	Ranking* (out of 24 experiences)	*Total*	*Australia*	*China*	*Germany*	*Spain*	*France*	*Italy*	*Nether-lands*	*Norway*	*Sweden*	*United States*
	Base	9022	1000	1000	1001	1002	1004	1011	1001	503	500	1000
HIGH INTEREST EXPERIENCES	Street food tour and tasting	1	1	1	3	1	7	2	2	2	3	1
	Vineyard tour and tasting	2	3	2	1	3	2	4	1	1	1	2
	A spa experience	3	5	6	4	2	5	1	6	3	2	4
	Guided nature experience	4	7	3	2	4	1	3	4	4	8	7
	Life 'behind the scenes'	5	2	5	5	5	4	7	3	7	6	3
	Distillery/ brewery experience	6	4	7	7	7	3	5	5	5	4	8
MID-RANGE INTEREST	Cookery class	7	6	10	8	10	8	8	8	6	5	6
	Chocolate making class	8	8	11	9	8	9	9	7	9	7	5
	A remote wellness retreat	9	9	4	6	6	12	6	10	8	10	10
	Photography class	10	13	9	12	11	14	10	11	12	12	13
	Baking school	11	11	13	15	12	10	11	12	10	14	9
	Cheese making class	12	10	15	11	13	11	13	13	13	9	12
	Shadowing experience	13	19	22	10	9	6	14	9	24	20	18
	Authentic craft workshop	14	12	8	20	15	15	12	14	16	13	11
	Mindfulness or meditation class	15	14	17	14	18	18	16	18	11	11	14
NICHE INTEREST	Foraging experience	16	17	12	13	14	13	20	17	17	15	23
	Fossil hunting	17	15	21	16	19	17	15	15	14	22	16
	Volunteering / working holiday	18	16	18	24	17	21	18	16	15	17	17
	Street art	19	20	16	19	22	19	17	19	22	24	15
	A yoga experience	20	21	24	22	16	22	19	21	19	19	21
	Guided fishing experience	21	22	14	21	24	16	21	22	20	18	20
	A homeopathic experience	22	23	19	17	23	20	23	23	23	16	19
	A tai chi experience	23	18	23	18	21	23	24	20	18	21	22
	A pilates experience	24	24	20	23	20	24	22	24	21	23	24

*ranking based on % done previously, booked to do in next 12 months, or interested in doing)

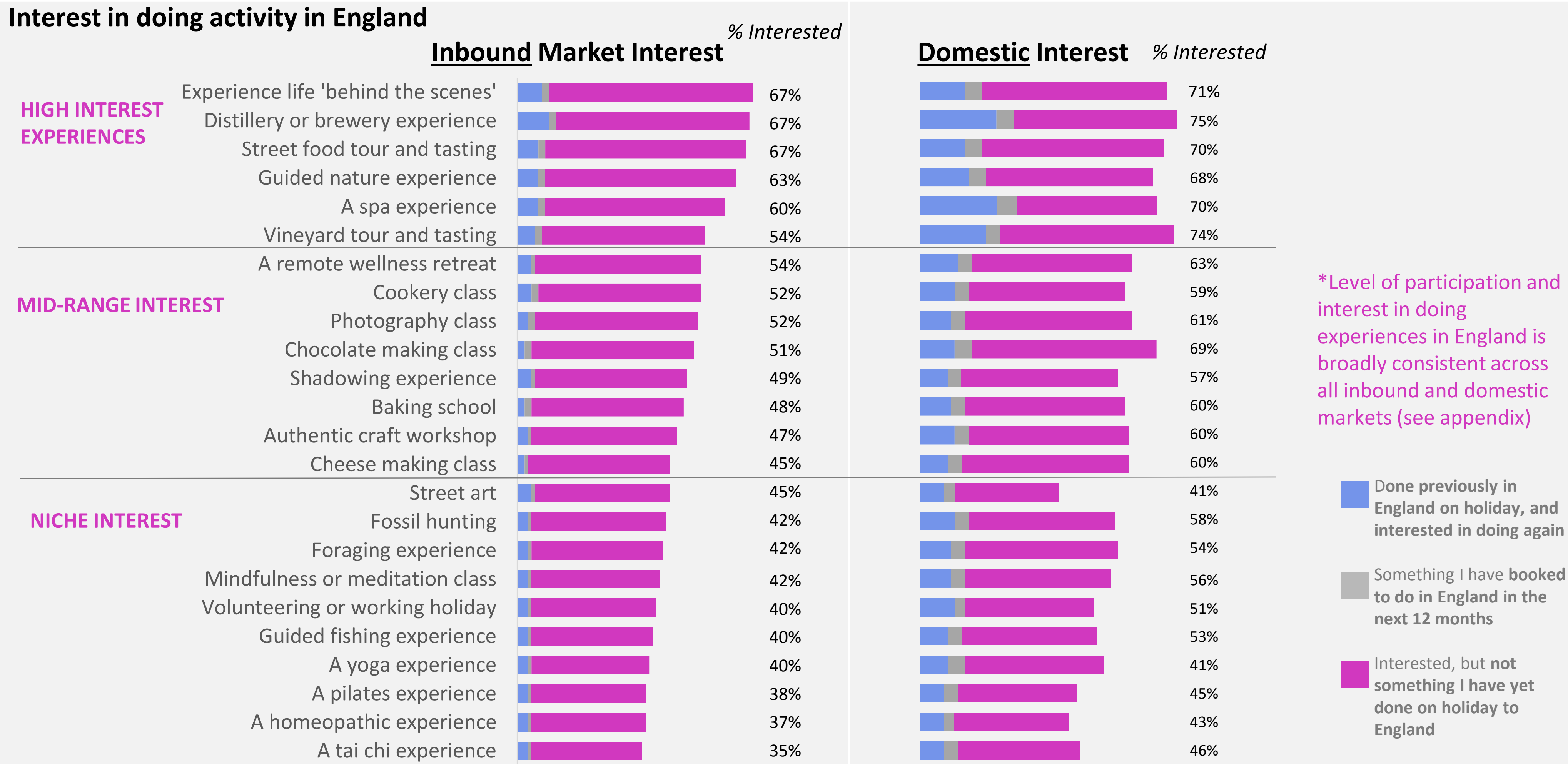
Question:B1/B2/B3. Which of the following statements best describes your general interest in or participation in the following types of experiences, whilst on an overseas holiday or short break.

Base: All interested in one or more experience

Source: Experiences Research 2019

Participation and interest in experiential activities on holiday to England

High Interest experiences are also popular in England, particularly among the Domestic market. The Domestic market has relatively high interest in some specific experiences such as chocolate making and low interest in others such as street art.



*Level of participation and interest in doing experiences in England is broadly consistent across all inbound and domestic markets (see appendix)

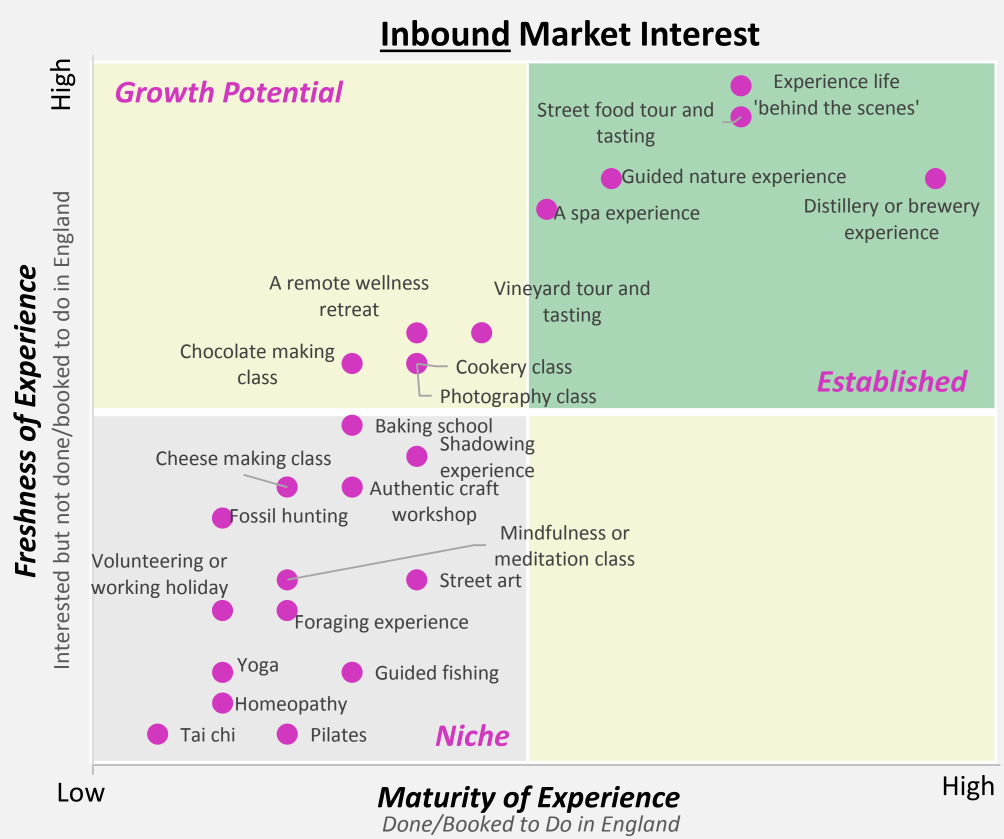
Question: B1/B2/B3/ B11. Which of the following statements best describes your general interest in or participation in the following types of experiences, whilst on holiday or short break to England.

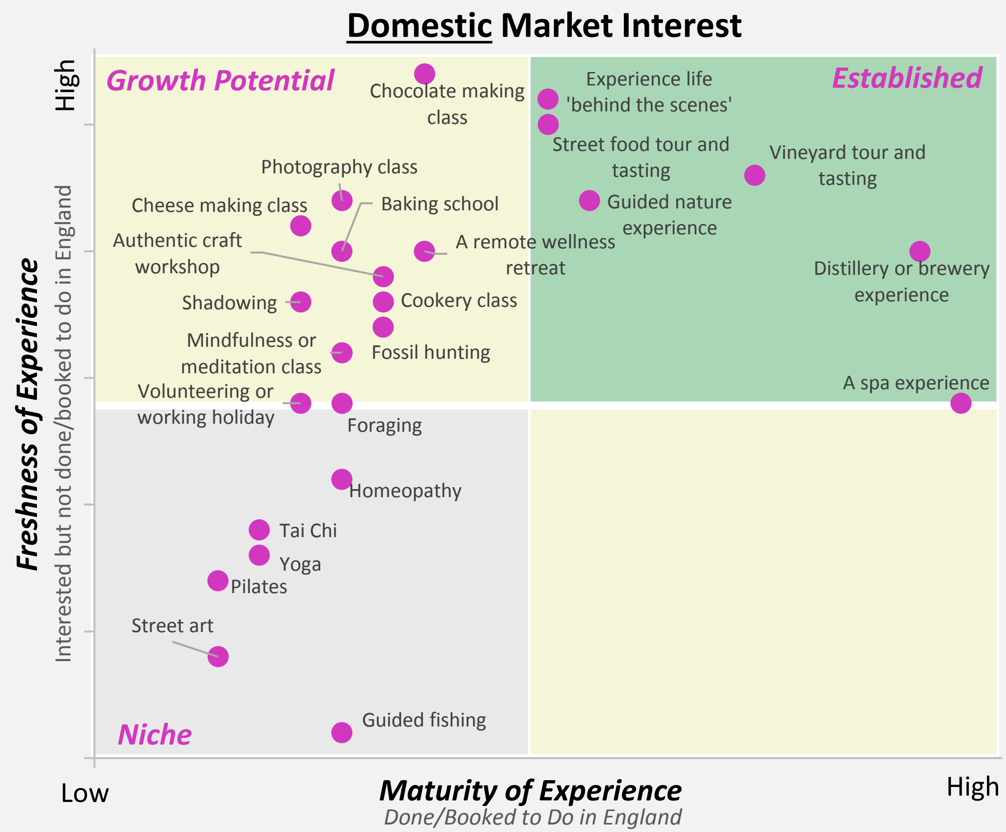
Base: All interested in one or more experience, Inbound Markets n=9022, Domestic Market n=1000

Source: Experiences Research 2019

Maturity versus 'newness' of experiential activities

Looking at the maturity vs the freshness or 'newness' of individual experiences helps us understand where the growth opportunities are for England





Question: B1/B2/B3/ B11. Which of the following statements best describes your general interest in or participation in the following types of experiences, whilst on holiday or short break to England.

Base: All interested in one or more experience, Inbound Markets n=9022, Domestic Market n=1000

Source: Experiences Research 2019

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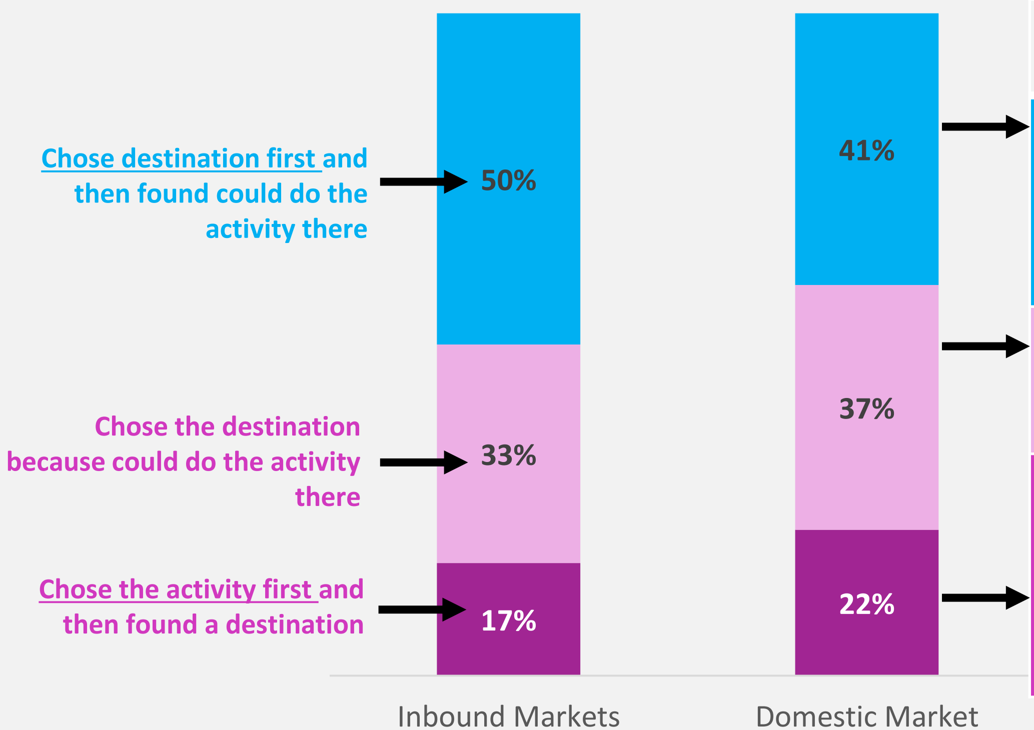
The role of experiences in driving holiday decisions: 2. The choice of holiday destination

Experiences play a role in destination decisions for 50% of international travel, though this is driven by a sub-set of activities. Domestic travel is more likely to be influenced by availability of activities

Influence of experience on holiday destination



Experiences which over-index in terms of level of influence experience had on chose of holiday destination

Inbound & Domestic Markets *Consistent across Inbound and domestic markets*	Inbound Markets	Domestic Market
Distillery or Brewery Experience Vineyard Tour & Tasting Homeopathy Experience Cookery Class Spa Experience	'Life Behind the Scenes'	Photography Class Authentic Craft Workshop
Remote Wellness Retreat	Tai Chi Experience	Fossil Hunting Mindfulness and Meditation Class
Volunteering or Working Holiday	Foraging Experience Photography Class Shadowing Experience Fossil Hunting Pilates Experience Mindfulness and Meditation Class	Guided Fishing Experience Spa Experience

Question:B6. Please indicate which of the following statements best describes why you chose that destination for each activity?

Source: Experiences Research 2019

The overall opportunity: key take-aways

There is an experiential holiday activity for nearly everyone	Relative appeal of doing experiential activities in England is similar across inbound / domestic markets	Not all experiential activities are equal in driving decisions to go on holiday or choosing a destination
• High levels of interest exist for participating in experiential activities whilst on holiday (any destination), with **less than 1% suggesting they have no interest** in any activities tested. • There is **relatively broad appeal across experiences** for the key demographics and segments – in general Buzzseekers are more likely to want to do experiences, with minimal skews by age and gender for some experiences.	• **Learning and food and drink experiences are most popular experiences**, both for the inbound and domestic markets – with wellness experiences (beyond Spa) being of niche appeal. • Looking at the maturity vs the freshness or 'newness' of individual experiences helps us **understand where the growth opportunities are likely to be**.	• **Experiences are the main reason for 1 in 7 decisions to go on holiday** – but these tend to be the niche / low interest experiences. • Experiences **play a role in destination decisions for 50% of international travellers**, though again driven by a sub-set of activities. • **Very few want experiential to be their whole trip**.

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Source: Experiences Research 2019

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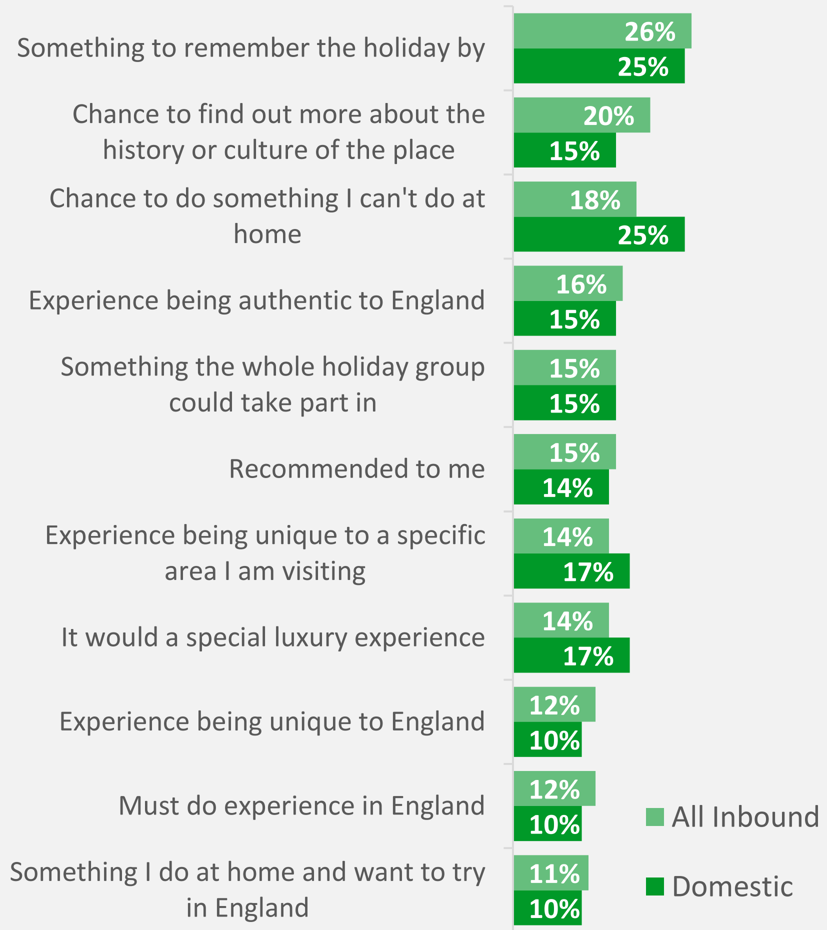
Maximising the opportunity for experiential activities in England

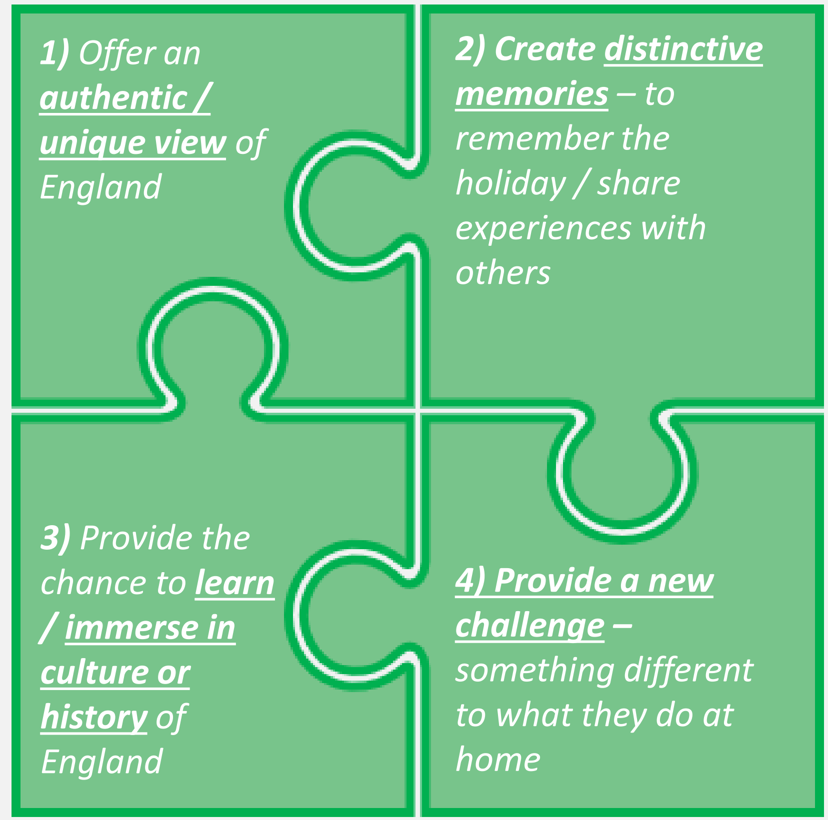
Source: Experiences Research 2019

Strengthening the opportunity: core components of experiential activities

There are four common components that experiential activity providers should look to emulate and amplify in order to encourage travellers to participate in experiences in England



Framework for product positioning to encourage travellers to do in England



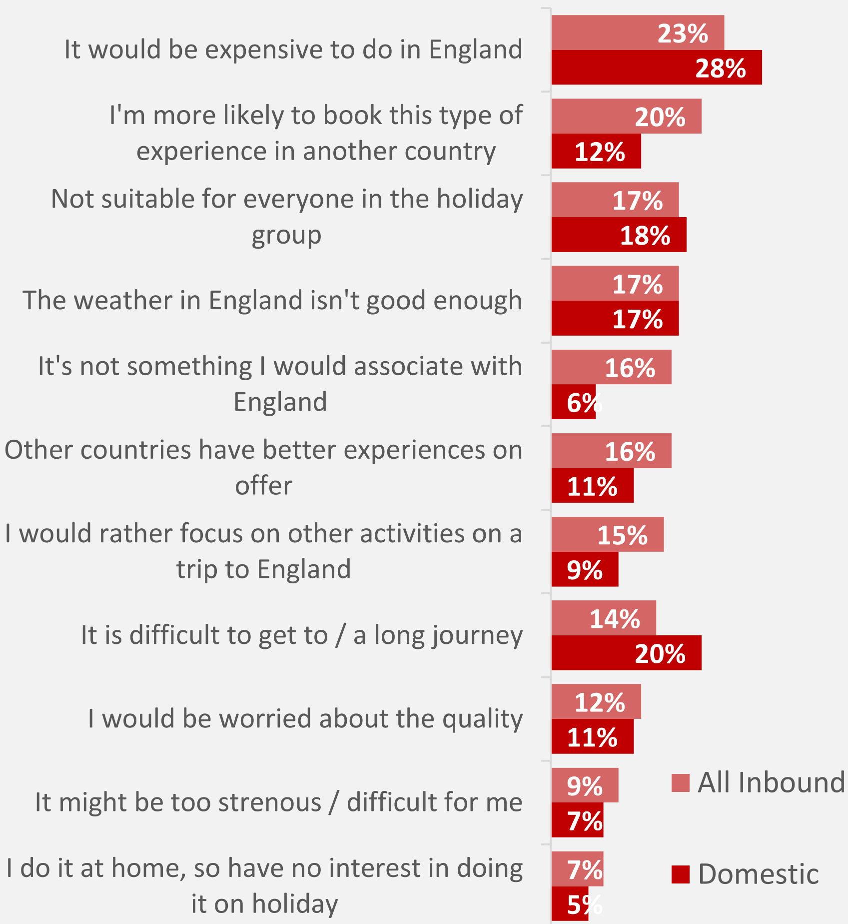
"I enjoyed wandering through the jungle and hearing the sounds of the island. Showing us the different birds and understanding which ones made what sounds, was really interesting. I feel like I got a ***unique view of the island and experienced the real island****, vs the touristy views."*

Question:C14. Which of the following would encourage you to do this activity specifically in England

Source: Experiences Research 2019

Address barriers to maximise the opportunity: common challenges to overcome

Irrespective of the type of experiences there are 4 common challenges to doing experiences in England - Cost, the pull of other destinations, the suitability for all those travelling in the group and the weather!



Four common challenges to overcome to encourage travellers to do experiences in England

Cost *– England is seen as an expensive destination, impacting on perceptions of the cost of individual experiences*

Competitive environment *– despite being interested in doing in some experiences in England, the pull of other destinations is sometimes stronger*

Suitability for all travelling in the group *– some experiences are not perceived as child friendly or physical activity level is a turn-off*

Weather *– particularly impacts outdoor experiences*

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Question: C15. Which of the following would discourage you to do this activity specifically in England

Source: Experiences Research 2019

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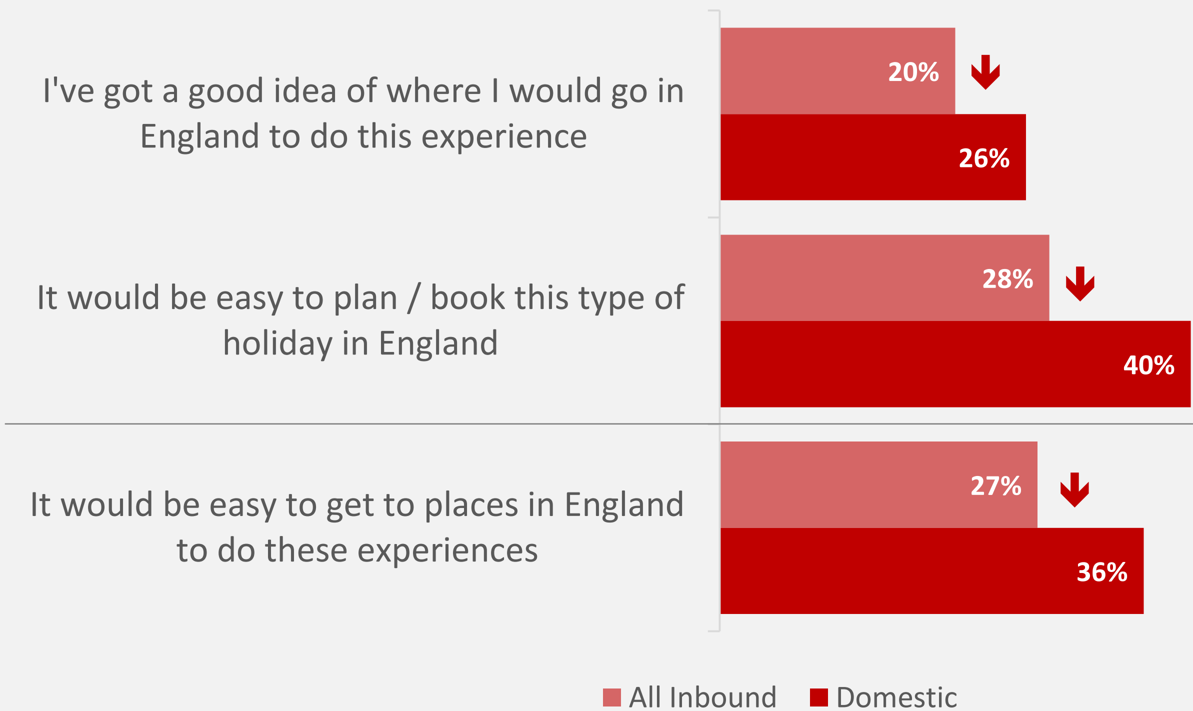
Address barriers to maximise the opportunity: building awareness of regional England

Creating awareness of where to do experiences, how to book them and how to get to them in England remains a challenge, particularly for inbound markets.

General Perceptions of England - % Agree



Building Awareness:

- Only 20% of inbound travellers have a good idea of where to do experiences in England and only 26% would find it easy to plan and book the experience – significantly lower than the domestic market

Building awareness of how to get to experiences :

- Only 27% of inbound travellers state it would be easy to get to places in England to do experiences – significantly lower than the domestic market

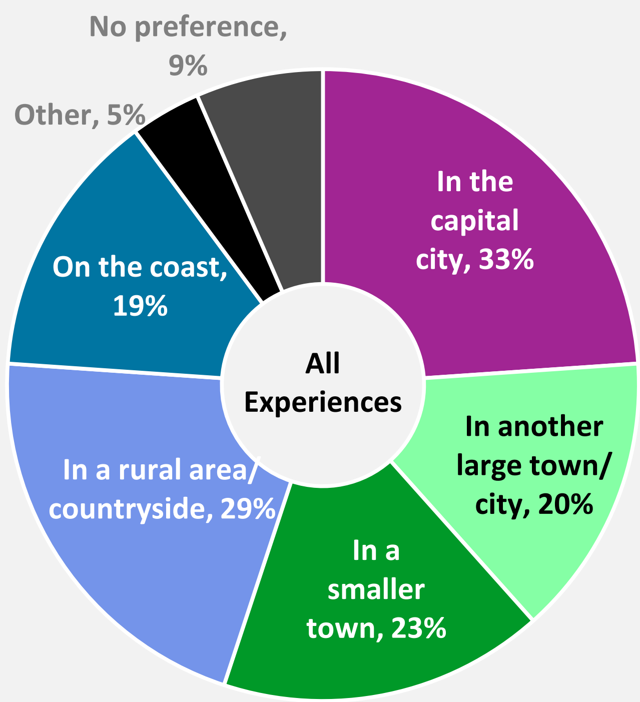
Question: C13. Which of the following would discourage you to do this activity specifically in England

Source: Experiences Research 2019

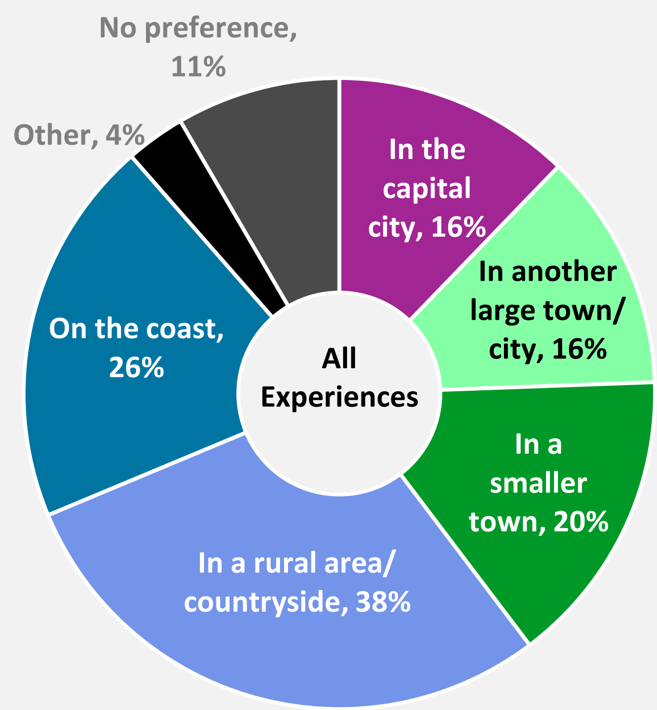
Go-to-market delivery: promoting experiences in more rural locations

Location type preferences illustrate the opportunity for experiences to support growth in regional England. However, the dominance of London as an inbound destination is also evident

Inbound Market Interest



Domestic Market Interest



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C1. What type of location will you be staying in or prefer to stay in whilst doing these activities / experiences on holiday

Source: Experiences Research 2019

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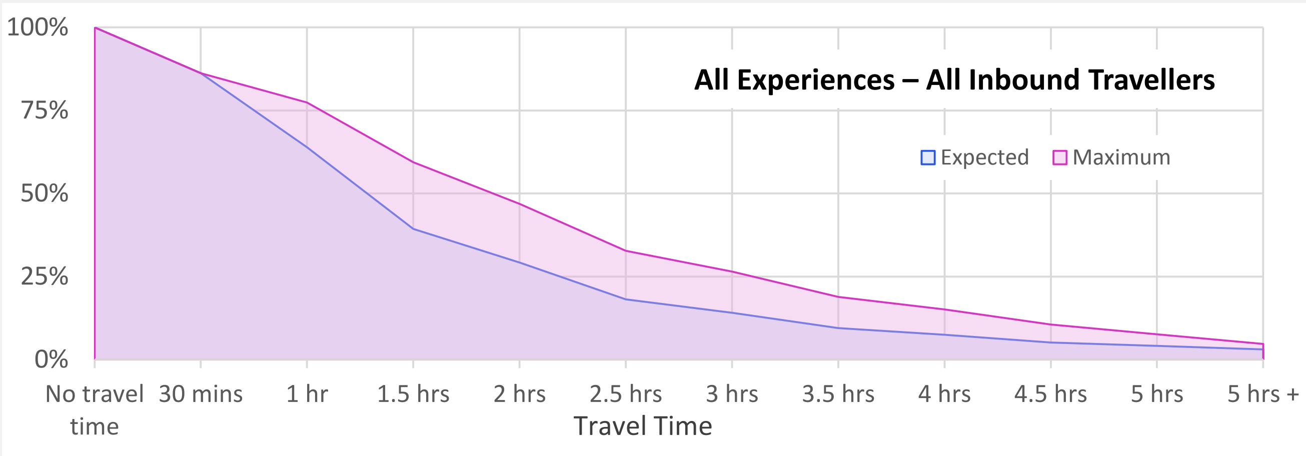
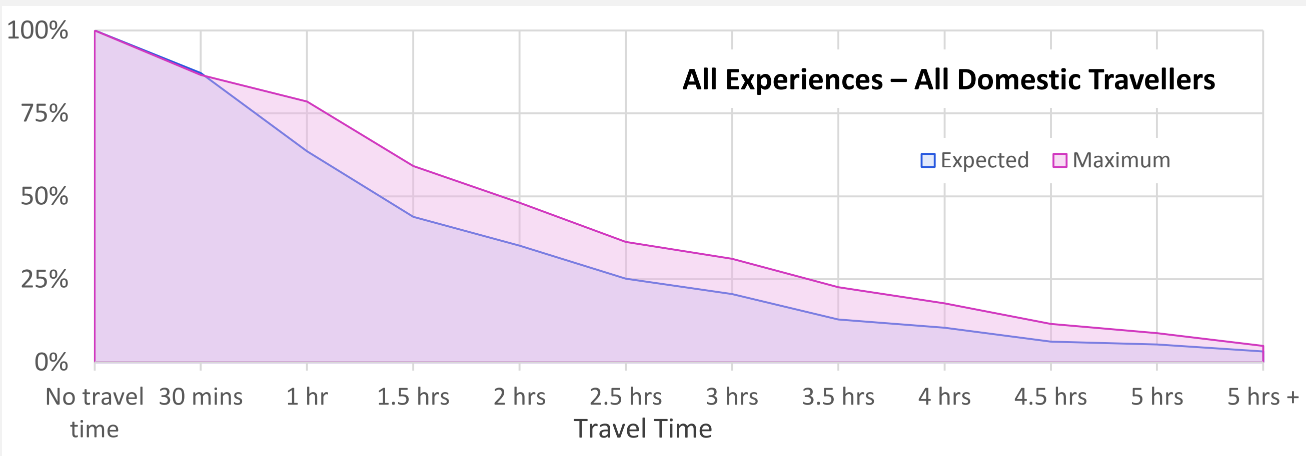
Go-to-market delivery: making experiences accessible

The shorter the drivetime the greater potential to attract travellers. Once drive times extend beyond 1 hour the share of people interested in the activity who would be willing to travel for longer drops rapidly





Experiences that people expect to have **no travel time** are either those that are seen as **multi-day:**

- Volunteering or Working Holiday
- Remote Wellness Retreat

Or mainstream/**widely available** activities that might be expected as part of the accommodation offer:

- Spa Experience

Experiences that can command a longer drive time are typically those that are linked to specific locations:

- Foraging Experience
- Guided Fishing Experience
- Volunteering or Working Holiday

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Source: Experiences Research 2019

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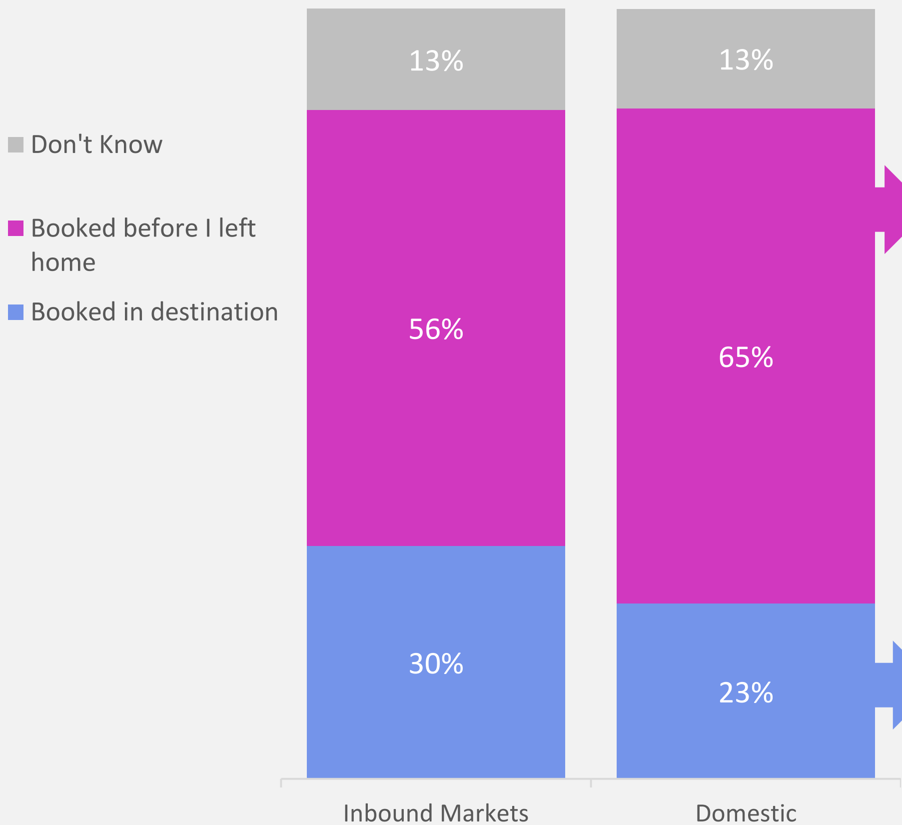
Go-to-market delivery: opportunity to promote both in source-market and in-destination

Half of inbound travellers and two thirds of domestic travellers book activities before they leave home. If not part of a package, then bookings will typically be made directly with the providers

Booking of the experience



Before I left home I booked …	*Inbound Markets*	*Domestic*
As part of package	24%	28%
Directly with provider	16%	20%
Through a third party	16%	10%

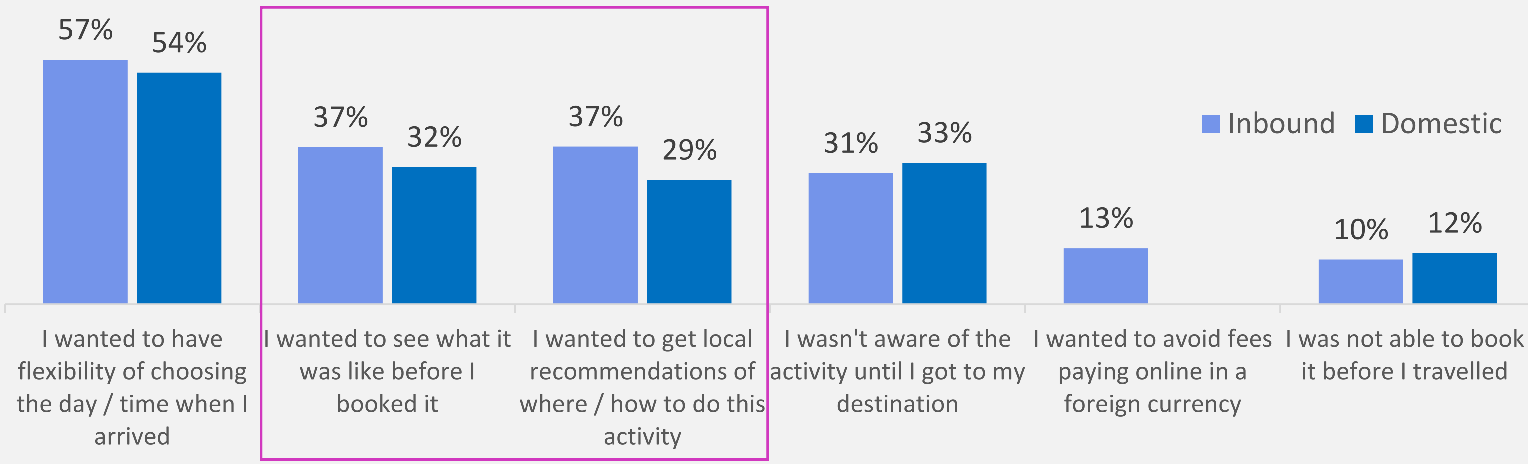
In Destination I booked …	*Inbound Markets*	*Domestic*
Directly with provider	20%	17%
Through a third party	11%	6%

Questions: C10 Which of the following best describes how you did or would book this activity?
C11. Which of the following best describes how you did or would book the that included each activity?
Base: UK Only. All interested in doing experiences on holiday in England
Source: Experiences Research 2019

Go-to-market delivery: on-the-ground opportunity for local promotion and advocacy programmes

Flexibility and a desire to see more of the experience before booking are the main reasons for not booking in advance. However the role for local recommendation and promotion are evident

Reasons why experiences are not booked before the start of the holiday



Over-indexing markets					
Australia Germany	China France	Australia Germany China	Netherlands Norway	Australia China US	China US

Opportunity to influence experiential spend on the ground

Most people liked to leave some spontaneous time on their trip, and were open to booking while at their destination

Hearing about activities while on a trip from other tourists, the hotel/ friends/ social media was ideal

A way to find out about little known, exclusive activities- feeling you were one of few who knew about something is part of the draw

A trusted source- a person vouching for the quality

kubi kalloo

Question:C11. Why did you book that activity / those activities in destination? Base: International Markets only. All interested in doing experiences on holiday in England

Source: Experiences Research 2019

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Maximising the opportunity of experiential activities in England: key take-aways

Strengthening the opportunity: the core components of experiential	Address barriers to maximise the opportunity: common barriers to overcome	Go-to-market delivery: elements to consider when promoting / developing itineraries
Experiences need to: • Be seen as **authentic and unique** to England • Create **distinctive memories** - to both remember and share the experience • Provide **cultural or historic immersion** – building a personal connection to the place and people • **Provide a challenge** – do something different to what they can do at home	• **Cost** - England is seen as an expensive destination, impacting on perceptions of the cost of individual experiences • **Competitive environment / ownership** – despite being interested in doing in some experiences in England, the pull of other destinations is sometimes stronger • **Targeting** - suitability for all travelling in the holiday group, some experiences are not perceived as child friendly or physical activity level is a turn-off • Mitigating the **weather** challenge • Building **awareness of regional England** - specifically for inbound markets, where knowledge is low	• Promoting experiences in **more rural locations** • Opportunity to **promote both in source-market and in-destination** • **On-the-ground opportunity** for local promotion and advocacy programmes • Extended **journey times** from accommodation & gateways will impact potential

Source: Experiences Research 2019

Exploring the opportunities and challenges across experience clusters




Source: Experiences Research 2019

Identifying clusters of experiences that have similar attributes

Grouping experiences to explore the opportunity:

- In order to summarise the opportunities and challenges across all experiences, we have identified 6 clusters.
- Experiences in each cluster share similar attitudes, behaviours and challenges towards participating in these experiences in England, across inbound and domestic markets.
- The clusters therefore indicate how similar experiences not specifically tested in this research might perform

Note: Through these groupings, we are not suggesting that these experiences should all be combined together in one full product itinerary – while there is a high degree of cross-over for some experience groupings, travellers may not want to do more than one experience on their visit.

*** While all six High Interest experiences are similar in terms of appeal and are established / mature experiences, Spa and Vineyard experiences face different challenges, so for some of the analysis we have looked at them separately**

1) High Interest Established Experiences*

- Experience life 'behind the scenes'
- Distillery / brewery exp
- Street food tour and tasting
- Guided nature experience

- Spa experience
- Vineyard tour and tasting

2) Skill Based Learning Experiences

- Photography class
- Shadowing experience
- Authentic craft workshop

3) Food & Drink Learning Experiences

- Cookery class
- Chocolate making class
- Baking school
- Cheese making class

4) Niche Wellness Experiences

- Mindfulness / Meditation class
- Yoga experience
- Pilates experience
- Homeopathic experience
- Tai chi experience

5) Multi-day Experiences**

- Remote wellness retreat
- Volunteering or working holiday

*** Note: These experiences appeal to very niche markets and a summary is not provided in this report. Please refer to the individual experience dashboards for details*

6) Low Interest / Niche Experiences**

- Street Art
- Fossil Hunting
- Foraging Experiences
- Guided Fishing

*** Note: These experiences appeal to very niche markets and a summary is not provided in this report. Please refer to the individual experience dashboards for details*

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Source: Experiences Research 2019 *see appendix for full descriptions of each experience tested

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High Interest Established Experiences – Group 1: overview & appeal

Have the highest levels of interest to do in England across the majority of inbound markets / domestic market. Well understood, mature experiences which are also most likely to have already been done on holiday before.

	Star rating – low to high
1 England Appeal	★★★★☆
2 Experience Maturity	★★★★★
3 Influence on destination decision	★☆☆☆☆
4 Authentic / Unique	★★★★★
5 Culture / History	★★★★☆

A reminder of the experience definitions:

LIFE 'BEHIND THE SCENES - exclusive or unique access to a historic building

DISTILLERY OR BREWERY EXPERIENCE – *discover the beer-making or gin-distilling process and taste it too*

STREET FOOD TOUR & TASTING – *with a food expert to guide you*

GUIDED NATURE EXPERIENCE – *go bird watching or observe wildlife in their natural habitat*

1 ENGLAND APPEAL: Rank Interest / Participation of Experiences

Ranking (out of 24 experiences)	Life 'Behind the scenes'	Distillery / brewery	Street food tour & tasting	Guided nature
All Inbound	1	2	3	4
Australia	1	2	3	4
China	6	9	1	2
Germany	1	2	4	3
Spain	2	3	1	5
France	1	2	5	3
Italy	5	1	2	3
Netherlands	1	2	4	3
Norway	2	1	3	5
Sweden	3	1	2	6
United States	2	4	1	5
UK	3	1	4	7

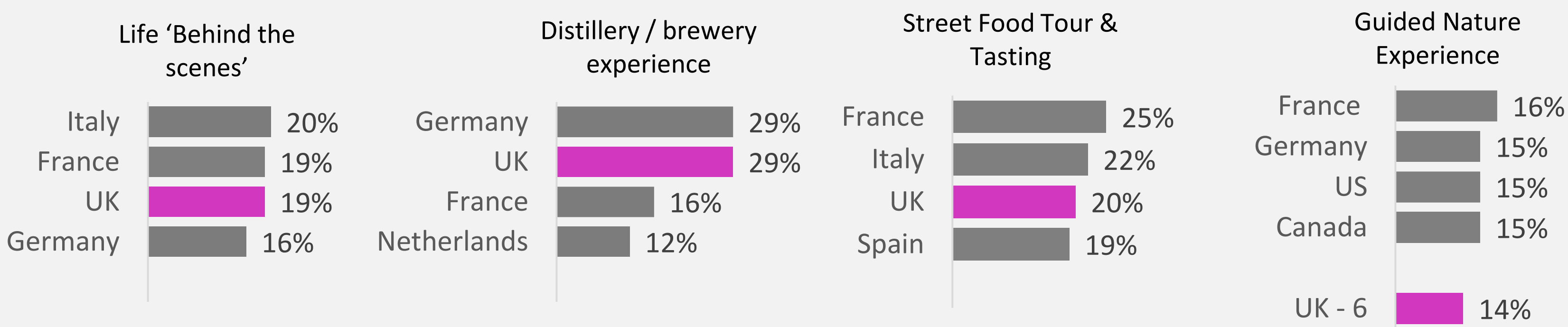
Indicates where ranking is lower (+4 from inbound markets)

Base: All markets
Source: Experiences Research 2019

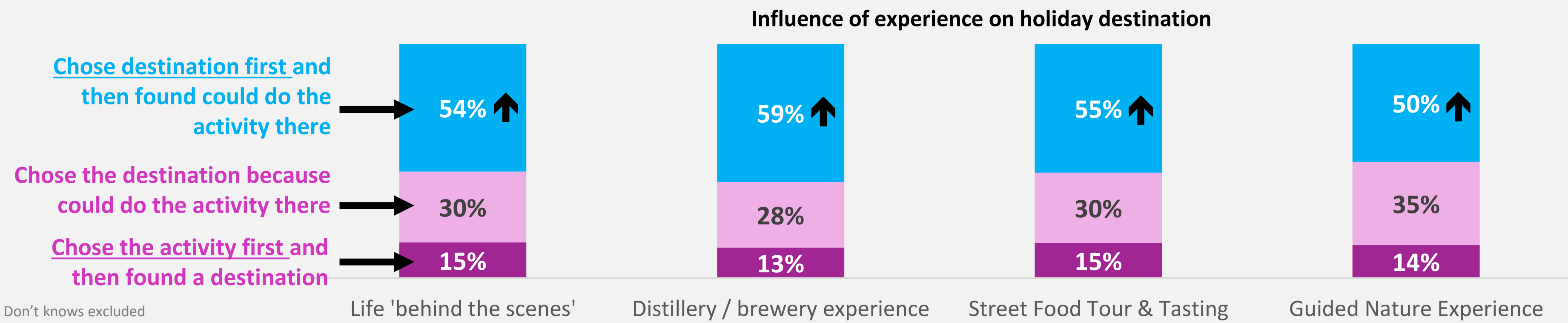
High Interest Established Experiences – Group 1: maturity & influence on holiday behaviour

The UK is already an established destination and there is some level of understanding where to do them. However, these experiences alone do not currently have the pulling power to drive travellers to England.

2 **EXPERIENCE MATURITY:** Across all markets, the UK is already an established destination for these activities, ranking high among those who have previously done / or have booked to do in the next 12 months.



3 **INFLUENCE ON DESTINATION DECISION:** Experiences alone don't currently have the pulling power to drive travellers to England – they tend to be experiences that are chosen **after** selecting the destination



Significantly higher than other experiences
Significantly lower than other experiences

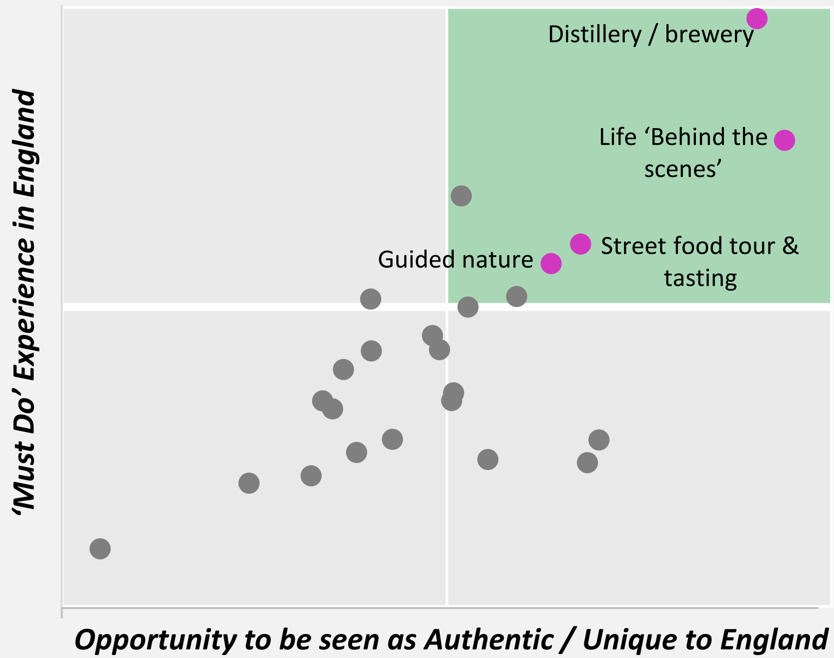
Base: All markets

Source: Experiences Research 2019

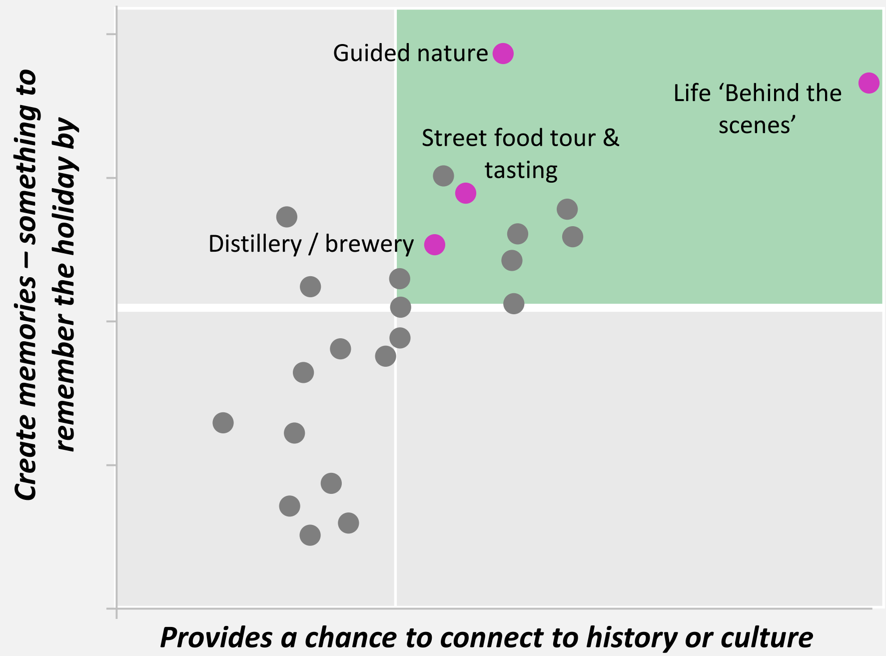
High Interest Established Experiences – Group 1: believability in core experiential components

Have the greatest opportunity across all experiences tested to be seen as 'must do' experiences that are authentic and unique to England, create memories of the holiday and connect to the culture / history of the place

4 **AUTHENTIC / UNIQUE:** All are seen as 'must do' experiences which can be authentic / unique to England



5 **CULTURE / HISTORY:** Provide a strong chance to connect the history and culture as well as create memories of the holiday



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Base: All markets
Source: Experiences Research 2019

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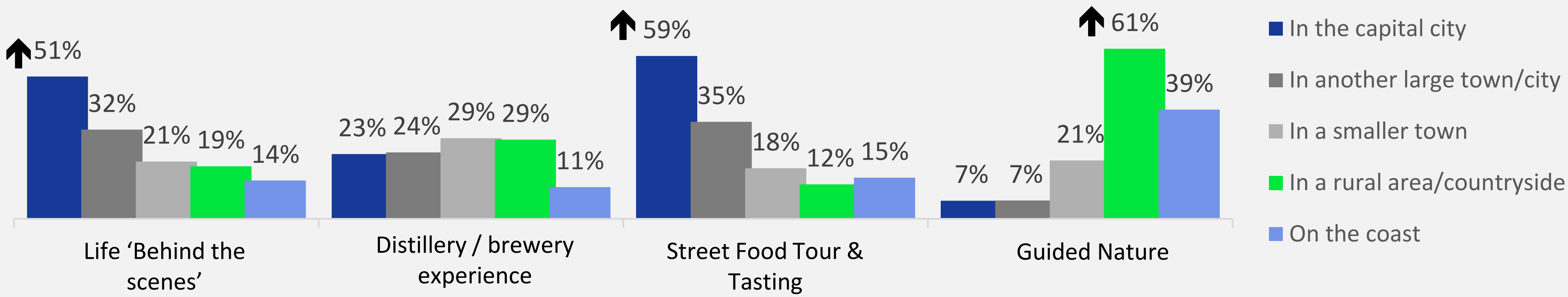
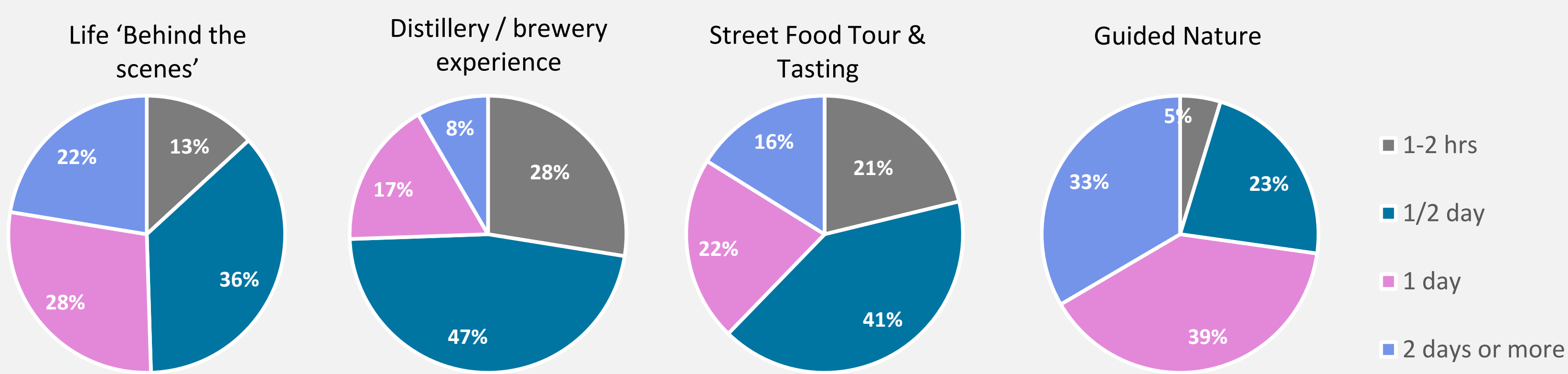
High Interest Established Experiences – Group 1: logistics

The experiences in this cluster have differing, but generally clear expectations of where they would be done and the expected duration of the experience

PREFERRED LOCATION FOR DOING EXPERIENCE: Some of the experiences, Life 'Behind the Scenes' and Street Food, have a natural home in the Capital City, so regional England would be competing with London



EXPECTED EXPERIENCE LENGTH: Some of the experiences, particularly distillery / brewery experiences are expected to last less than half a day



Don't knows excluded

Significantly higher than other experiences
Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

High Interest Established Experiences – Group 1: key take outs

Popular experiences which have an established market and future growth potential but may need differentiation as expert-led experiences rather than self-guided activities

ENGLAND APPEAL

- **Strongest interest / appeal** in doing these experiences in England across all markets
- The **UK is already an established destination** for these activities
- **High awareness of where to do these experiences in England** and how to book them

OPPORTUNITIES

- Seen as **'must do' experiences** which can be **authentic and unique** to England
- Potential to connect visitors **to the culture and history** of England
- Seen as a way to **create memories** of the holiday

Some felt a guide was unnecessary and as activity could be done easily on own. Questioned if a guide could add value to experience

CHALLENGES

- Experiences alone don't currently have the pulling power to drive travellers to England – they tend to be **experiences that are chosen after selecting the destination,** in part due to the perceived length the experience should take
- **Some of the experiences** (Life 'Behind the Scenes' and Street Food) have a **natural home in the Capital City**
- May need **differentiation as expert-led experiences** rather than self-guided experiences

Maximising the opportunity: Positioning these as expert-led experiences will differentiate them from similar 'tourist' activities and grow the opportunity for bookable products

Base: All markets
Source: Experiences Research 2019

High Interest Established Experiences – Group 2

Source: Experiences Research 2019

High Interest Established Experiences – Group 2: overview & appeal

Experiences are of high interest, established and well understood. However, currently England is not seen as a natural host for these experiences. Developing and promoting English versions of the experiences will be key to growth.

	Star rating – low to high
1 England Appeal	★★☆☆☆
2 Experience Maturity	★★★★★
3 Influence on destination decision	★☆☆☆☆
4 Authentic / Unique	★☆☆☆☆
5 History / Culture	★☆☆☆☆

A reminder of the experience definitions:

SPA EXPERIENCE– *relax with several treatments at a specialist venue*

VINEYARD TOUR AND TASTING – *discover the wine making process and taste it too*

1 ENGLAND APPEAL: Rank Interest / Participation of Experiences

Ranking (out of 24 experiences)	Spa Experience	Vineyard tour and tasting
All Inbound	5	6
Australia	6	5
China	8	3
Germany	6	7
Spain	4	9
France	6	8
Italy	4	9
Netherlands	7	11
Norway	4	9
Sweden	4	7
United States	3	6
UK	5	2

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

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Base: All markets
Source: Experiences Research 2019

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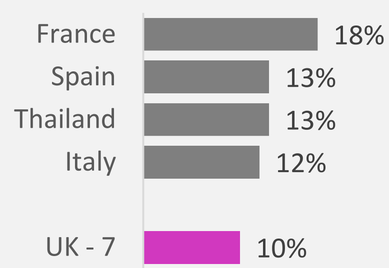
High Interest Established Experiences – Group 2: maturity and influence on holiday behaviour

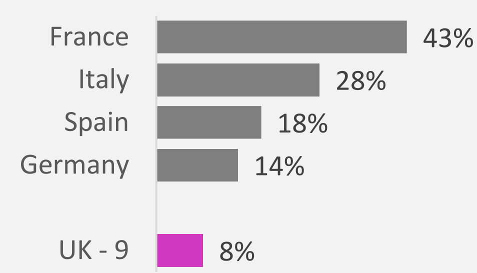
While established experiences, the pull of other markets is greater – among those who are interested in experiences, they are more likely to book them in another country. They do not generally drive the choice of holiday destination

2 **EXPERIENCE MATURITY:** The UK ranks lower in terms of where travellers have previously done / or have booked to do these experiences in the next 12 months.

Spa Experience

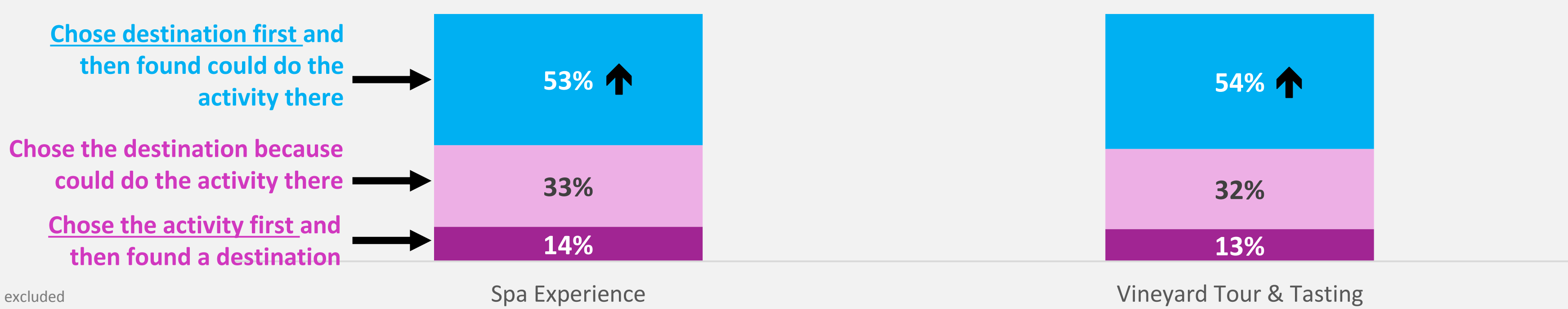


Vineyard Tour & Tasting



3 **INFLUENCE ON DESTINATION DECISION:** Experiences alone don't currently have the pulling power to drive travellers to England – they tend to be add-on experiences.

Influence of experience on holiday destination



Don't knows excluded

↑ Significantly higher than other experiences ↓ Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

High Interest Established Experiences – Group 2: believability in core experiential components

There is some work to do to convince travellers these experiences belong to England and can add to the authenticity of the holiday overall

4 **AUTHENTIC / UNIQUE:** Currently not seen as 'must do' experiences or authentic / unique to England

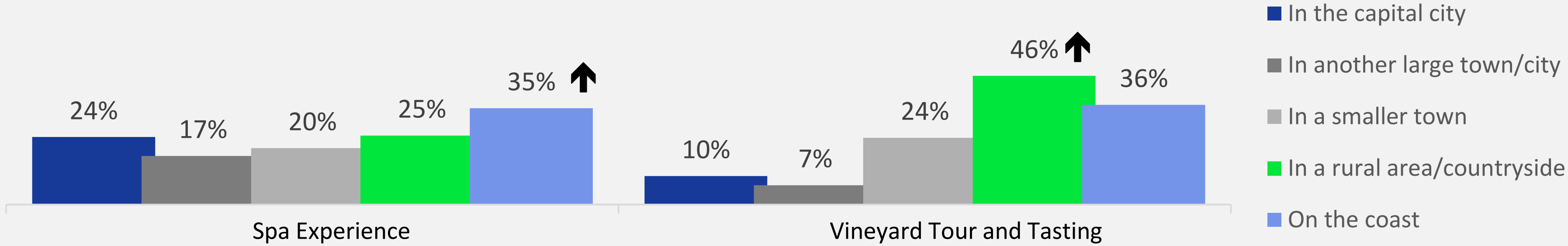
5 **CULTURE / HISTORY:** Currently do not offer a strong chance to connect the history and culture

Base: All markets
Source: Experiences Research 2019

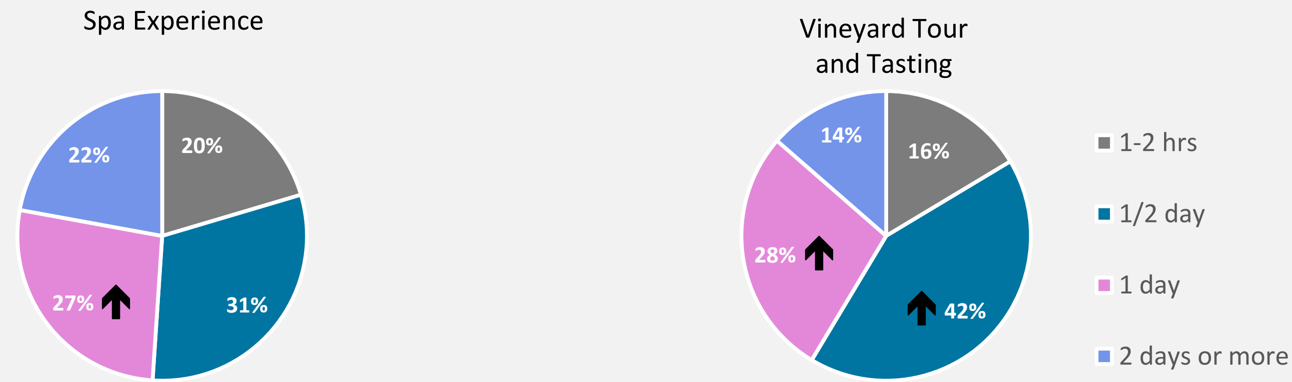
High Interest Established Experiences – Group 2: logistics

Experiences do have a home in rural / regional England, however, England's credentials for offering these experiences is not well understood, particularly among inbound travellers

PREFERRED LOCATION FOR DOING EXPERIENCE: Have a clear home in rural and coastal settings



EXPECTED EXPERIENCE LENGTH: Typical expected duration is up to a day



Don't knows excluded

Significantly higher than other experiences
Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

High Interest Established Experiences – Group 2: key take outs

Experiences are of high interest and are well established and understood. However, currently England is not seen as a natural host for these experiences – boosting our credentials in these spaces will be key to growth.

ENGLAND APPEAL

- While interest is high, ~40% of those who express interest in doing in England state that **other countries have better experiences on offer** or they are **more likely to book in another country**
- **Clear domestic market** for these experiences, in particular, for those in the UK who recognise our wine making credentials

OPPORTUNITIES

- Experiences do have a home in **rural / regional England**
- To convert interest into purchase, experience providers need to **communicate what is authentic or unique** about doing this experience in England

CHALLENGES

- *Spa Experience:* The experience must deliver on high expectations of travellers - being **special / luxurious – accommodation providers will be key to delivering this**
- *Vineyard Tour & Tasting:* To convert interest into purchase, particularly in inbound markets, re-enforcement is needed about **how easy it is to get to the places in England** that offer these experiences and **how unique wine making is to specific areas of the country**

Maximising the opportunity: Communicating England's credentials and packaging with other 'luxurious' experiences / activities will support growth opportunities

Base: All markets
Source: Experiences Research 2019

Skill Based Learning Experiences

Source: Experiences Research 2019

Skills Based Learning Experiences: overview & appeal

Medium interest in doing these activities in England, with strong opportunity for growth, if providers get the positioning right and are competitively priced

	Star rating – low to high
1 England Appeal	★★★☆☆
2 Experience Maturity	★★★☆☆
3 Influence on destination decision	★★★☆☆
4 Authentic / Unique	★★★☆☆
5 Culture / History	★★★★☆

A reminder of the experience definitions:

PHOTOGRAPHY CLASS - learn how to photograph wildlife, scenery or architecture with an expert

SHADOWING EXPERIENCE – go out with a park ranger as they care for the landscape

AUTHENTIC CRAFT WORKSHOP – learn a traditional local craft with an expert (e.g. weaving, pottery, painting)

1 ENGLAND APPEAL: Rank Interest / Participation of Experiences

Ranking (out of 24 experiences)	Photography Class	Shadowing	Authentic Craft Workshop
All Inbound	9	11	13
Australia	10	16	13
China	7	20	5
Germany	11	8	19
Spain	8	7	14
France	9	4	12
Italy	7	14	13
Netherlands	6	5	13
Norway	11	24	13
Sweden	10	14	12
United States	13	16	10
UK	9	15	11

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

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Base: All markets
Source: Experiences Research 2019

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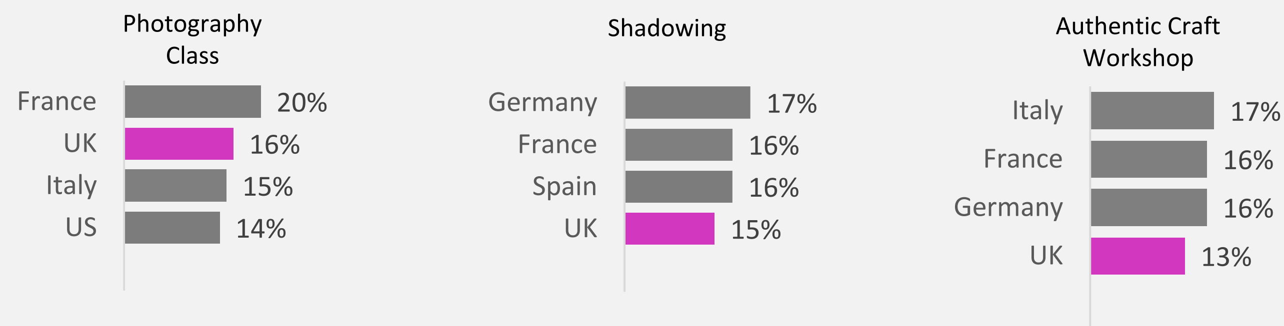
Skills Based Learning Experiences: maturity and influence on holiday behaviour

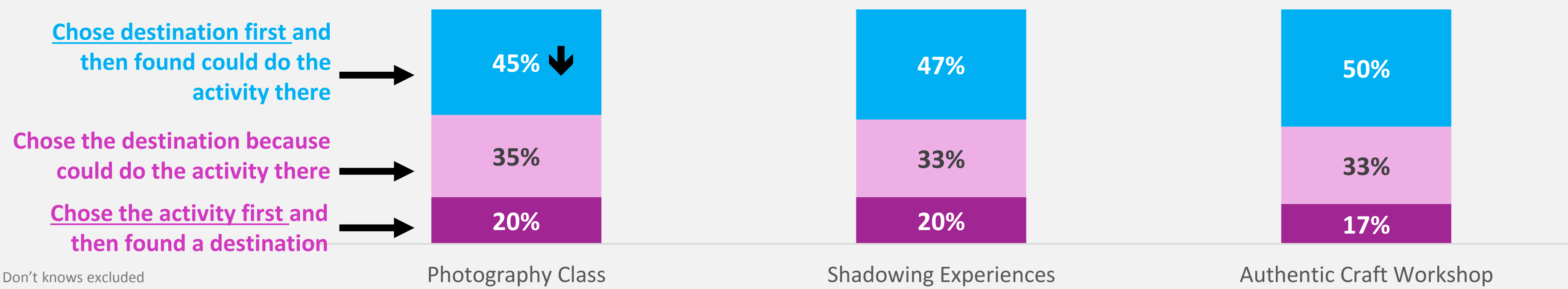
Potential for growth in England as there is no clear host destination for these experiences.

2 **EXPERIENCE MATURITY:** The UK is already a visited destination of choice for these activities, ranking relatively similar to other markets among those who have previously done / or have booked to do in the next 12 months.



3 **INFLUENCE ON DESTINATION DECISION:** Experiences alone don't currently have the pulling power to drive travellers to England – they tend to be experiences that are chosen after selecting the destination

Influence of experience on holiday destination



Don't knows excluded

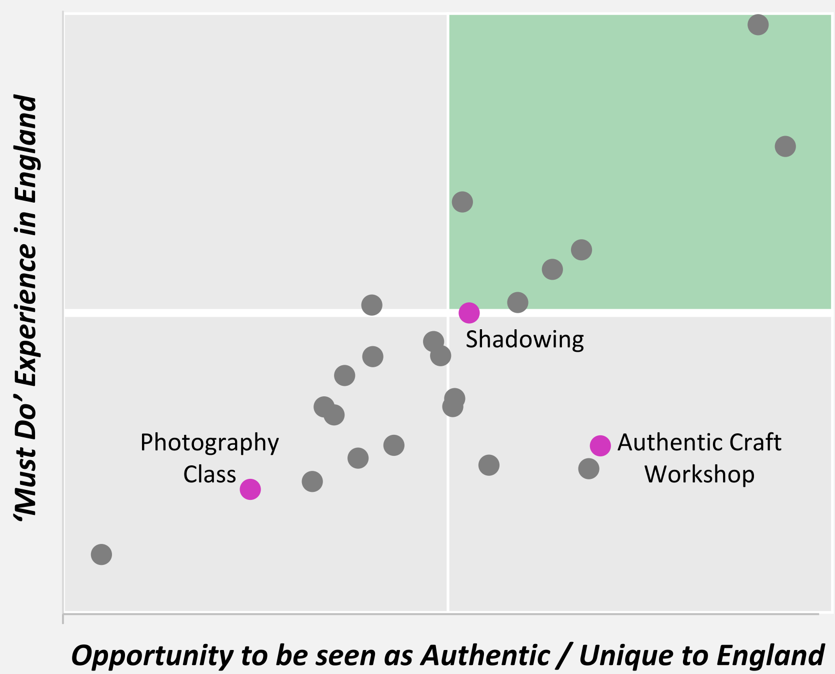
↑ Significantly higher than other experiences ↓ Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

Skills Based Learning Experiences: believability in core experiential components

These experiences provide the opportunity to create memories of the holiday and connect to culture / history but are not seen as 'must do' activities – this could apply to any skill based learning experience.

4 **AUTHENTIC / UNIQUE:** They are not seen as 'must do' activities – and photography, not authentic or unique to England



5 **CULTURE / HISTORY:** Experiences are strong in terms of their ability to connect to history and culture and to create memories

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Base: All markets
Source: Experiences Research 2019

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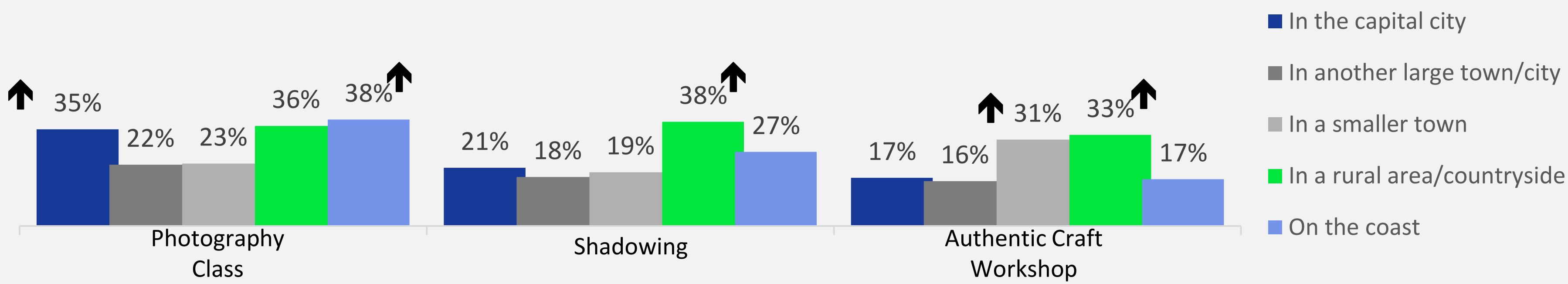
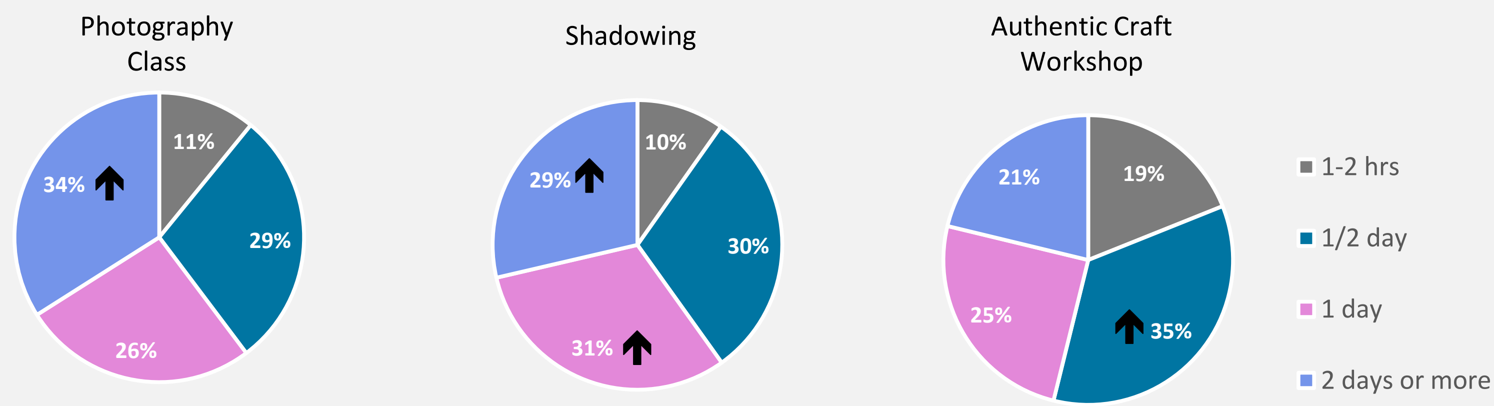
Skills Based Learning Experiences: logistics

Relatively high appeal to do in regional England, and opportunity to create longer experiences. Communication of individual specific products can address both these topics to provide clarity for the traveller

PREFERRED LOCATION FOR DOING EXPERIENCE: There is relatively high interest in doing the experience outside of Capital Cities – good news for the regional England.



EXPECTED EXPERIENCE LENGTH: Photography and Shadowing are seen as longer length experiences, that can last up to 2 days or more



Don't knows excluded

Significantly higher than other experiences
Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

Skills Based Learning Experiences: key take outs

Medium interest in doing these activities in England, with strong opportunity for growth, if providers get the positioning right and are competitively costed

ENGLAND APPEAL

- **Medium ranking** in terms of experiences visitors want to partake in while on holiday to England.
- **Potential for growth in England** as there is no clear host destination for these experiences.

OPPORTUNITIES

- Clear link that these experiences provide an opportunity to **create memories** of the holiday and **connect to culture / history**
- There is relatively **high interest in doing the experience outside of Capital Cities**
- Photography classes and Shadowing experiences are more likely to be **booked before leaving home, and therefore have the potential to drive holiday behaviour**

CHALLENGES

- No clear link yet that these experiences are **authentic and unique** to England, particularly Photography – a fuller explanation might combat this
- **Weather and the cost are prohibitive factors**, particularly for Photography and Shadowing – cost is linked to the expectation that these experiences will last longer than one day

Maximising the opportunity: Promoting a specific individual skill based learning experience should address many of the challenges and amplify the connection to England

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Base: All markets
Source: Experiences Research 2019

Food & Drink Learning Experiences

Source: Experiences Research 2019

Food & Drink Learning Experiences: overview & appeal

While England is not the obvious choice, there is opportunity to capitalise on globally known brands and high profile TV content

	Star rating – low to high
1 England Appeal	★★☆☆☆
2 Experience Maturity	★★☆☆☆
3 Influence on destination decision	★☆☆☆☆
4 Authentic / Unique	★★☆☆☆
5 History / Culture	★☆☆☆☆

A reminder of the experience definitions:

COOKERY CLASS - learning to cook traditional local specialities

CHOCOLATE MAKING CLASS – learn from expert chocolatiers

BAKING SCHOOL – learn to make regional specialities such as cakes, pastries, bread

CHEESE MAKING CLASS – learn to make local cheese

1 ENGLAND APPEAL: Rank Interest / Participation of Experiences

Ranking (out of 24 experiences)	Cookery Class	Chocolate Making Class	Baking School	Cheese Making Class
All Inbound	8	10	12	14
Australia	9	7	8	11
China	10	11	12	15
Germany	9	10	15	12
Spain	11	10	12	16
France	7	11	14	15
Italy	8	11	12	18
Netherlands	8	9	10	15
Norway	7	8	10	17
Sweden	9	5	15	11
United States	7	8	9	14
UK	13	6	12	10

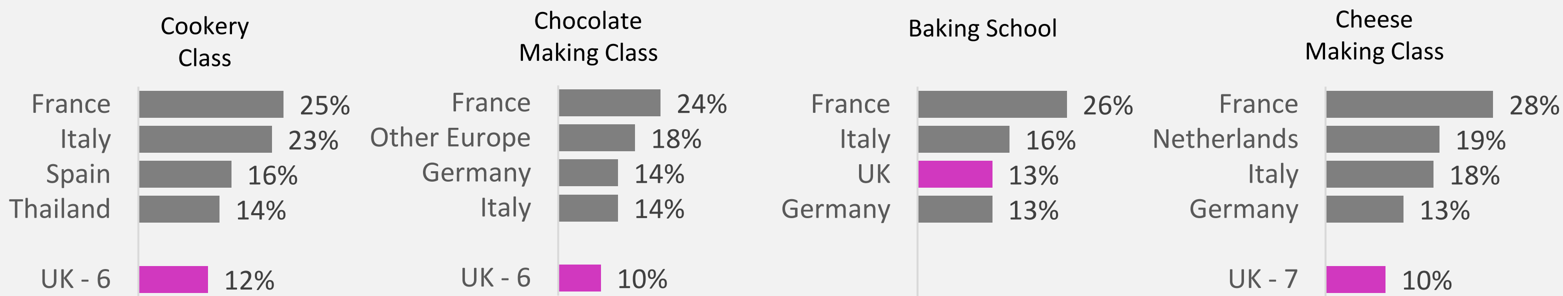
Indicates where ranking is lower (+4 from inbound markets)

Base: All markets
Source: Experiences Research 2019

Food & Drink Learning Experiences: maturity and influence on holiday behaviour

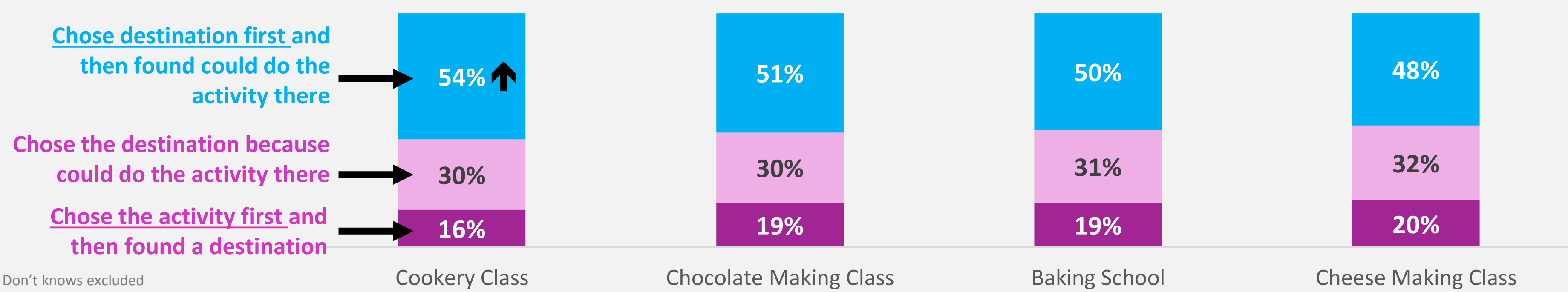
While there is relatively high interest in doing these experiences in England, there is strong competition with other European countries who may claim 'ownership' of some – England is currently not the obvious choice for these type of experiences

2 **EXPERIENCE MATURITY:** There is a clear host in European markets for these types of experiences. France ranks high among those who have previously done / or have booked to do the experience in the next 12 months



3 **INFLUENCE ON DESTINATION DECISION:** Experiences alone don't currently have the pulling power to drive travellers to England – they tend to be experiences that are chosen after selecting the destination

Influence of experience on holiday destination



Don't knows excluded

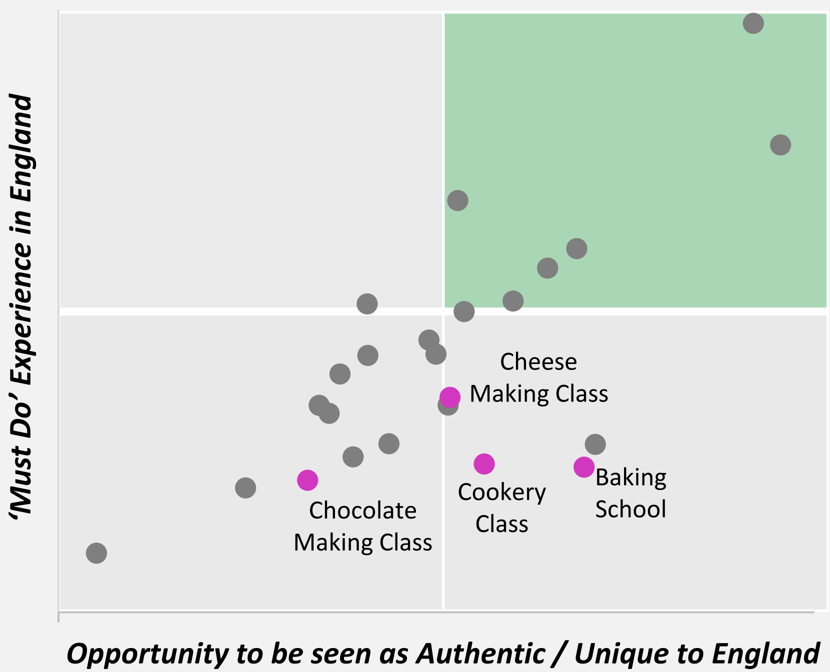
Significantly higher than other experiences
Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

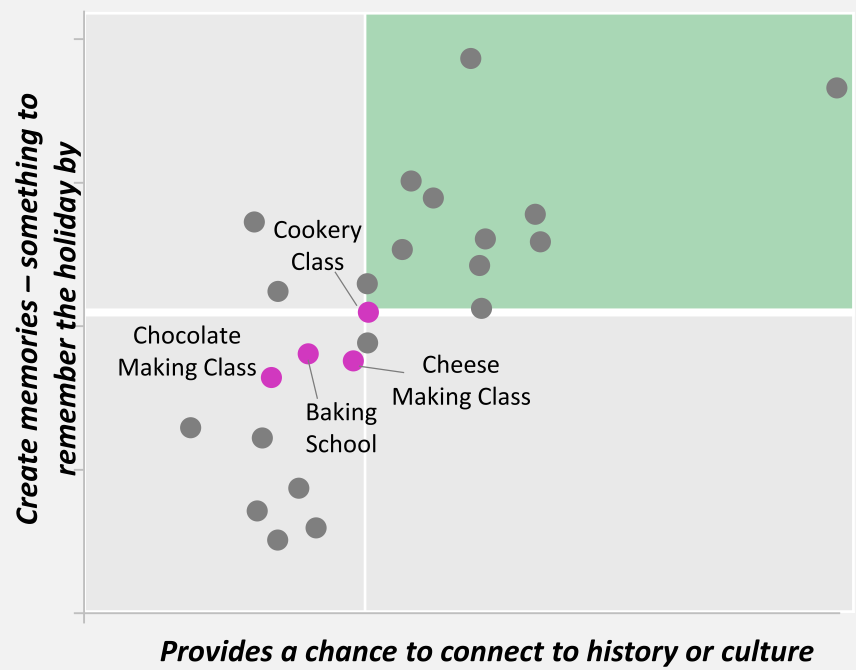
Food & Drink Learning Experiences: believability in core experiential components

There is more work to do to convince visitors that many of these experiences can be authentic / unique to England, and can be linked to history and culture of England (where there is a bigger disconnect)

4 **AUTHENTIC / UNIQUE:** The ability to be seen authentic and unique is somewhat recognised, but not strong enough to be seen as 'must do' experiences to do in England



5 **CULTURE / HISTORY:** Travellers are not connecting these experiences to local history or culture, and furthermore are not necessarily seen as a strong way of creating memories of the holiday

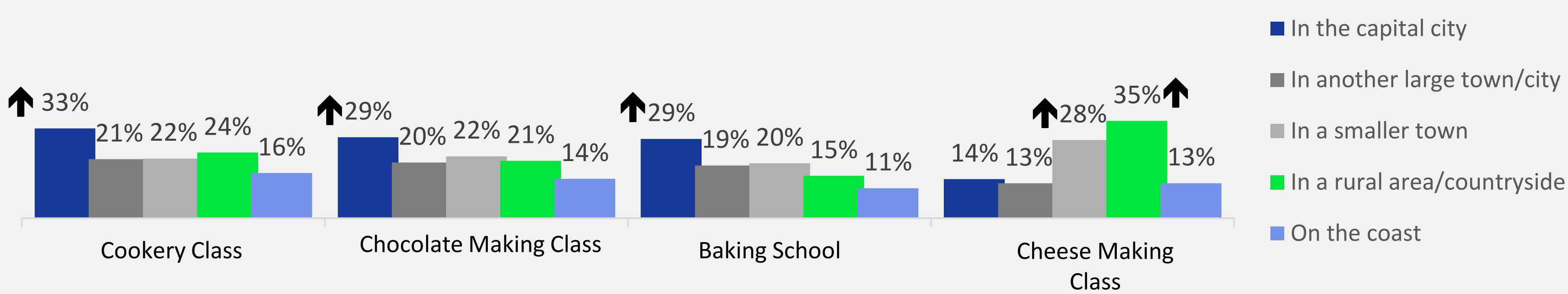


Base: All markets
Source: Experiences Research 2019

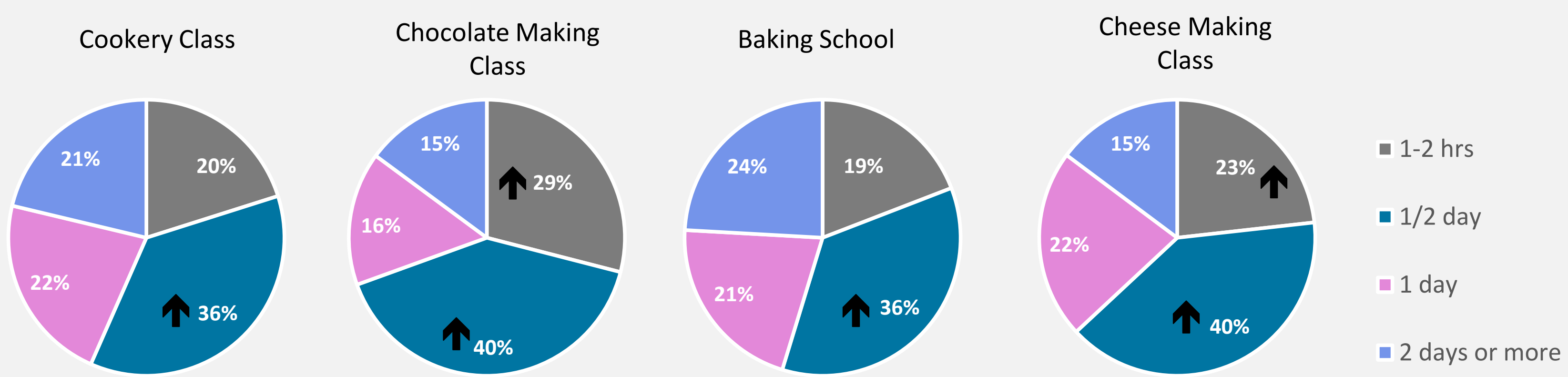
Food & Drink Learning Experiences: logistics

Challenge to convince visitors that these experiences have a regional home. The expectation around the length of experience is not clear to travellers – flexible options and clear communication of duration are important considerations

PREFERRED LOCATION FOR DOING EXPERIENCE: Currently, visitors are likely to expect to do these experiences in London, aside from Cheese Making



EXPECTED EXPERIENCE LENGTH: Most of these experiences are expected to last less than half a day



Don't knows excluded

Significantly higher than other experiences
Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

Food & Drink Learning Experiences: key take outs

While England is not the obvious choice, there is opportunity to capitalise on globally known brands and high profile TV content

ENGLAND APPEAL

- **Medium ranking** in terms of experiences visitors want to partake in while on holiday to England, with **potential for growth**.
- **Communicating the fun element** will help broaden the interest

OPPORTUNITIES

- England is currently **not the obvious choice for these type of experiences** - there is strong competition with other European countries (particularly France and Italy).
- Building on existing credentials could form the foundation for growth - i.e. Cadbury World to Frys; franchised TV programmes such as Bake-off, Masterchef etc.

CHALLENGES

- Visitors are **likely to expect to do these experiences in cities,** outside of cheese making – potentially impacting the current perception of authenticity of these experiences in England
- **Travellers are not connecting these experiences to local culture / history of England**, and furthermore, these experiences are **not seen as strong way of creating memories** of their holiday.

Maximising the opportunity: Challenge to convince visitors that these experiences have a regional home given the apparent lack of understanding of regions and their specialities. The expectation around the length of experience is varied for travellers – flexible options and clear communication of duration are important considerations

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Base: All markets
Source: Experiences Research 2019

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Niche Wellness Experiences

Source: Experiences Research 2019

Niche Wellness Experiences: overview & appeal

While niche, there is a market for these experiences, especially among those who do them at home. Those interested are likely to be interested in most or all of the experiences in this cluster.

	Star rating – low to high
1 England Appeal	★☆☆☆☆
2 Experience Maturity	★☆☆☆☆
3 Influence on destination decision	★★★☆☆
4 Authentic / Unique	★☆☆☆☆
5 History / Culture	★☆☆☆☆

A reminder of the experience definitions:

MINDFULNESS OR MEDITATION CLASS – learn how to relax and recharge

HOMEOPATHIC EXPERIENCE – e.g. acupuncture, reflexology or osteopathy

YOGA EXPERIENCE – e.g. at a famous landmark, outdoors or combined with another sport

PILATES EXPERIENCE- e.g. at a famous landmark or outdoors

TAI CHI EXPERIENCE – e.g. at a famous landmark or outdoors

1 ENGLAND APPEAL: Rank Interest / Participation of Experiences

Ranking (out of 24 experiences)	Mindfulness / Meditation	Homeo-pathy	Yoga	Pilates	Tai Chi
All Inbound	18	23	21	22	24
Australia	15	24	22	21	23
China	18	17	23	21	24
Germany	17	21	20	22	23
Spain	21	24	17	19	22
France	19	21	20	23	24
Italy	17	23	19	22	24
Netherlands	19	24	22	23	21
Norway	12	23	16	21	20
Sweden	13	18	20	23	24
United States	15	20	21	24	22
UK	16	19	21	22	20

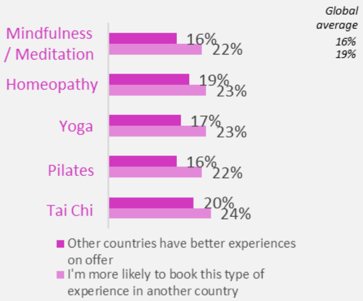
Indicates where ranking is lower (+4 from inbound markets)

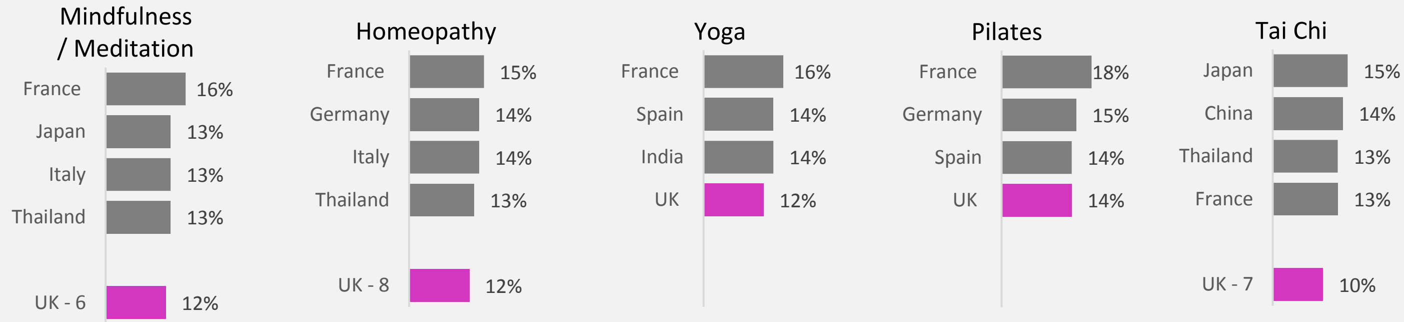
Base: All markets
Source: Experiences Research 2019

Niche Wellness Experiences: maturity and influence on holiday behaviour

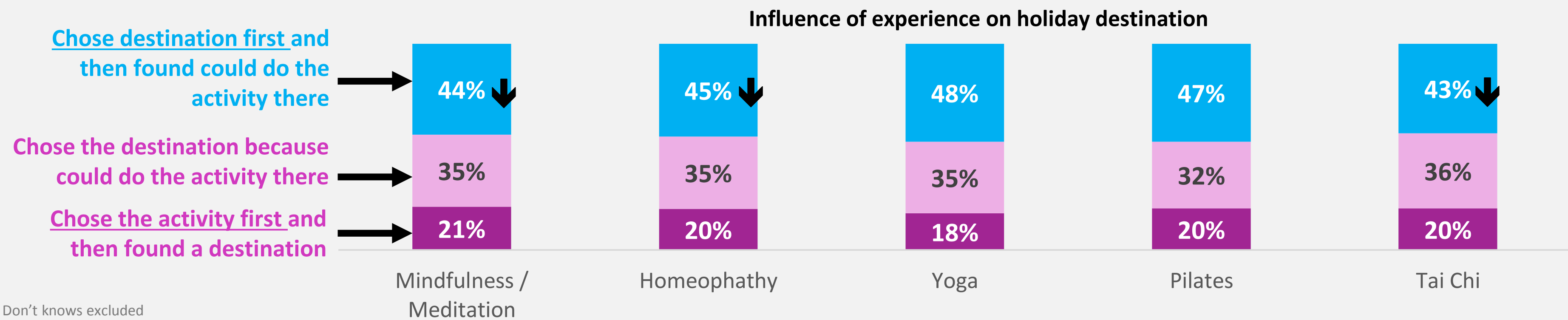
Even among those interested in doing in England, the pull to do in other countries is strong – particularly from Europe and Asia. Outdoor versions of these activities will potentially be hampered by perceptions of England's weather.

2 **EXPERIENCE MATURITY:** The UK is not most popular choice for these types of experiences, ranking low among those who have previously done / or have booked to do in the next 12 months





3 **INFLUENCE ON DESTINATION DECISION:** These activities can drive destination choice but that amplifies still further the need to provide the 'why England'



Don't knows excluded

Significantly higher than other experiences Significantly lower than other experiences

Base: All markets
Source: Experiences Research 2019

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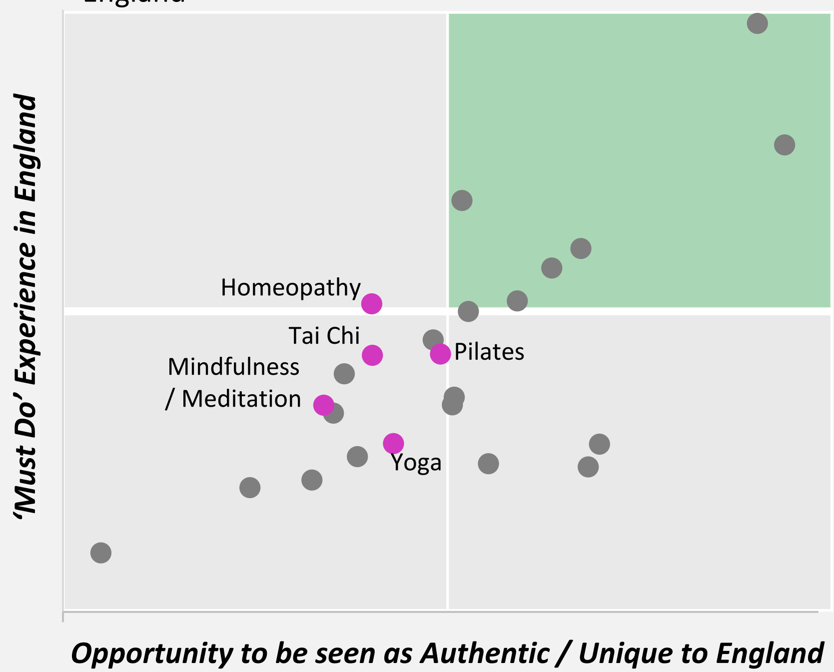
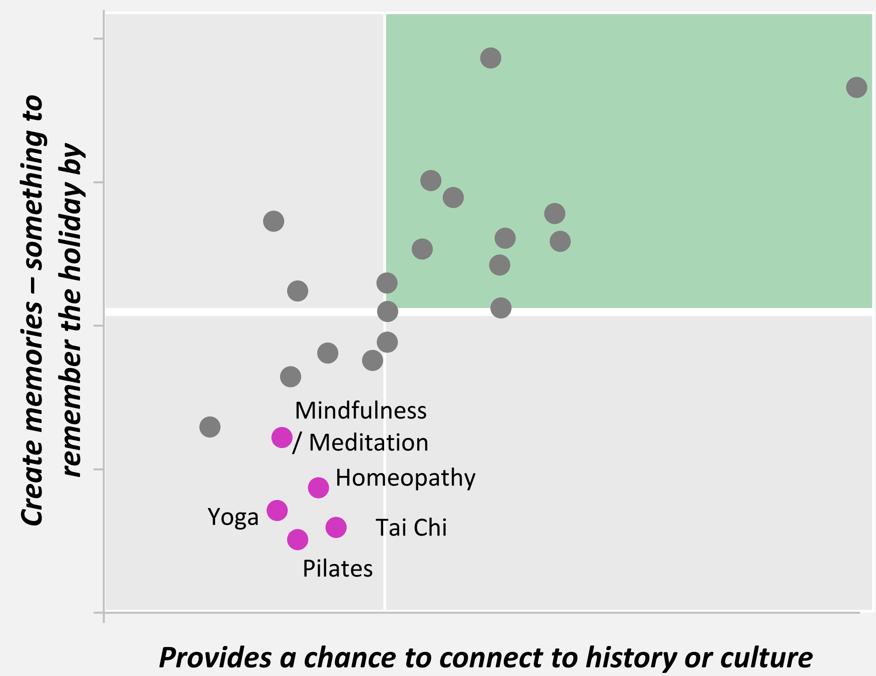
Niche Wellness Experiences: believability in core experiential components

Not seen as authentic / unique to England. Unlike other experiences, there is no current connection to culture / history (i.e. doing them at famous landmarks) or to create memories

4 **AUTHENTIC / UNIQUE:** These experiences are <u>not</u> seen as 'must do' experiences which are authentic / unique to England



5 **CULTURE / HISTORY:** There is no strong pull / connection to learning about the culture / history (i.e. doing them at a famous landmark) or as a vehicle to create memories of their holiday



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Base: All markets
Source: Experiences Research 2019

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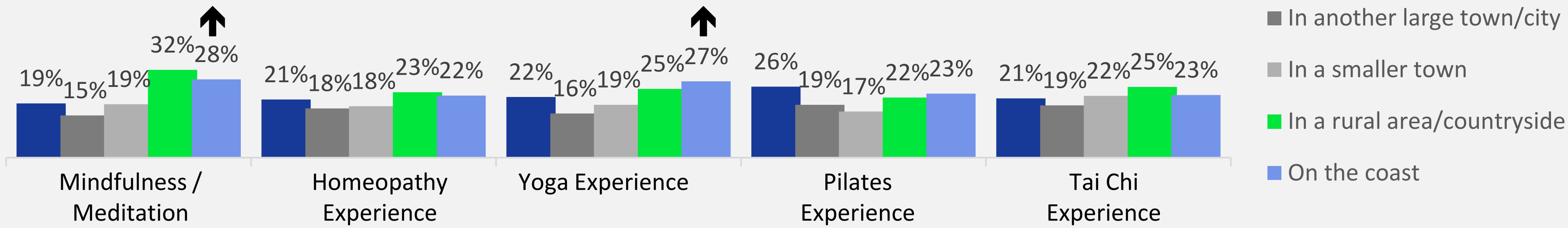
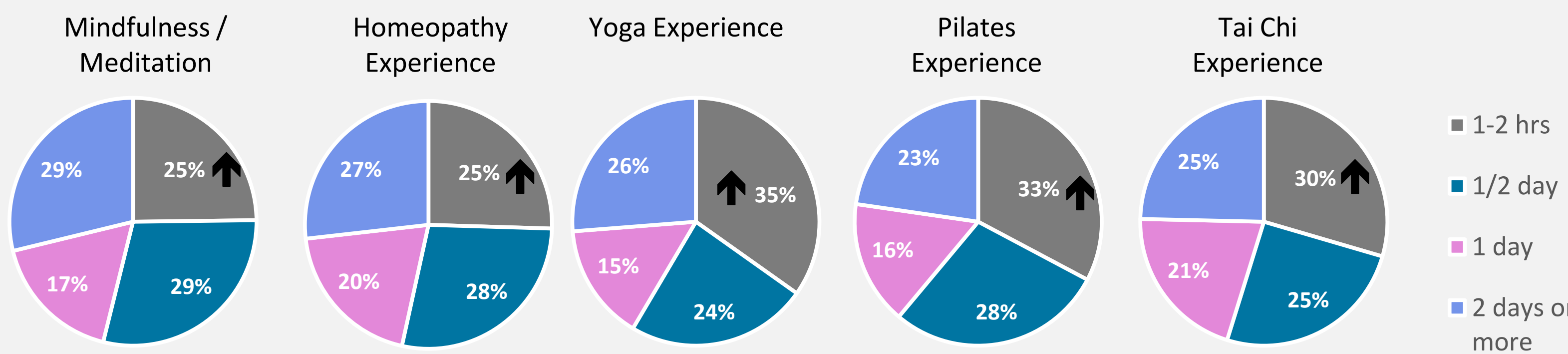
Niche Wellness Experiences: logistics

Coastal preferences further amplify expectations that these experiences will be done in warmer climates and / or picturesque locations.   Providing duration and indoor options would maximise the potential opportunity

PREFERRED LOCATION FOR DOING EXPERIENCE: The Coast is a popular location for Mindfulness / Meditation and Yoga experiences



EXPECTED EXPERIENCE LENGTH: There is a considerable variation in the length of experience, providing potential for them to be a core holiday motivator or a short add-on



Don't knows excluded

Significantly higher than other experiences   Significantly lower than other experiences

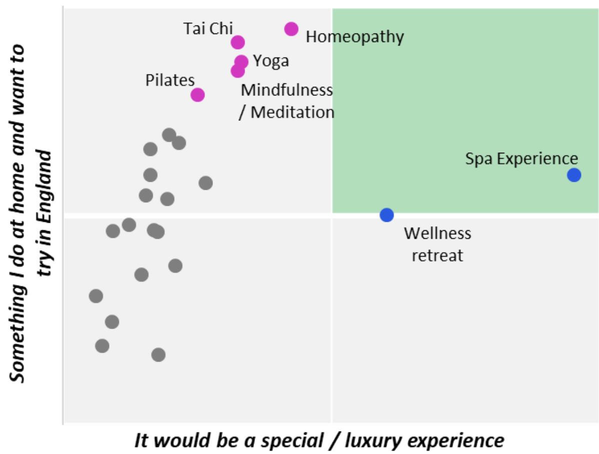
Base: All markets
Source: Experiences Research 2019

Niche Wellness Experiences: key take outs

While niche, there is a market for these experiences, especially among those who do them at home. Positioning will be key when trying to make England a destination of choice for these experiences

ENGLAND APPEAL

- Very **niche opportunity** for these experiences in comparison, with low levels of interest – the core target is those who **partake in activities in their home country.**



OPPORTUNITIES

- There is a considerable variation in the length of experience, providing **potential for them to be a core holiday motivator or a short add-on**
- Positioning will be key – they **don't expect luxury experiences** (compared to a Spa experience)
- Currently, there is **no strong connection to culture / history** (i.e. doing them at a famous landmark) for these experiences, but this could present an **opportunity to create a unique English version** of these experiences

CHALLENGES

- Even among those interested in doing in England, the **pull to do in other countries is strong -** coming from Europe and Asia.
- Coastal preferences further amplify expectations that these experiences will be done in **warmer climates and / or picturesque locations**.

Maximising the opportunity: Careful targeting of the niche audience for these experiences is key. Providing duration and indoor options would maximise the potential opportunity

Base: All markets
Source: Experiences Research 2019

Summary – Factors for consideration when developing experiential activities

Source: Experiences Research 2019

Factors for consideration when developing experiential activities

When developing or promoting experiential activities there is a checklist of questions to consider. The relative importance of each will vary according to the type of experience. Individual Experience Dashboards contain further details.

Assessing the opportunity - Core components of experiential - Addressing common barriers		Go-to-market delivery: elements to consider when promoting / developing itineraries	
• Can the experience be positioned as **authentic and unique** to England or ideally, a particular place within England?	✓	• Is it an **established** experience that is **known and understood** by travellers already? If it is, then differentiation may be the challenge. If not, clear, inspirational communication will be needed	✓
• Does it currently **belong** to another country? If so what is the pull of England as a destination?	✓	• **Who** will the activity **appeal** to? Who do they travel with? How do they book their travel?	✓
• Will it create **distinctive memories** - to both remember and share the experience?	✓	• What other activities might be of interest to the target audience that could be **packaged** or offered as **alternatives**?	✓
• Does it provide some level of **cultural or historic immersion** – that will enable the participant to connect it to the place or the people around it?	✓	• How do you engage with the trade to sell **bookable product in advance** of travel?	✓
• Does it **provide enrichment** – to do something new/fun/different to things done at home?	✓	• What **local promotion** and advocacy programmes can be developed to generate **in-destination** bookings?	✓
• Is it only an **expert-guided** experience or is there a **self-guided** alternative? If so, communication of the value of expert-guided will be necessary	✓	• What is the **journey time** from regional gateways? How **accessible** is the activity from regional hubs/other attractions?	✓
• Is there a contingency solution to **mitigate** for the **weather** for outdoor activities?		• Does the activity have a **fixed duration** or can **variable length** options be provided?	✓

Source: Experiences Research 2019

Appendix




Source: Experiences Research 2019

Experience Descriptions and Clusters 5 and 6

Source: Experiences Research 2019

Glossary

Full Experience Descriptions Tested

Food & Drink Experiences	Learning Experiences	Wellness Experiences
Foraging experience – expert led course to find food in the wild	Photography class – learn how to photograph wildlife, scenery or architecture with an expert	A tai chi experience – e.g. at a famous landmark or outdoors
Guided fishing experience to catch and cook your own dinner	Experience life 'behind the scenes' – exclusive or unique access to a historic building	A pilates experience - e.g. at a famous landmark or outdoors
Cookery class – learning to cook traditional local specialities	Shadowing experience – go out with a park ranger as they care for the landscape	A yoga experience – e.g. at a famous landmark, outdoors or combined with another sport
Baking school – learn to make regional specialities such as cakes, pastries, bread	Fossil hunting – explore and uncover history with an expert guide	A remote wellness retreat – spend quality time relaxing away from technology
Chocolate making class – learn from expert chocolatiers	Guided nature experience – go bird watching or observe wildlife in their natural habitat	A spa experience – relax with several treatments at a specialist venue
Cheese making class – learn to make local cheese	Volunteering or working holiday – spend time helping to restore or preserve a historic site	Mindfulness or meditation class – learn how to relax and recharge
Street food tour and tasting - with a food expert to guide you	Street art – meet street artists and have a go yourself at a wall mural	A homeopathic experience – e.g. acupuncture, reflexology or osteopathy
Vineyard tour and tasting – discover the wine making process and taste it too	Authentic craft workshop – learn a traditional local craft with an expert (e.g. weaving, pottery, painting)	
Distillery or brewery experience – discover the beer-making or gin-distilling process and taste it too		

Definitions Used Within this Report

Level of participation or interest in experiences

- Done – taken part in the activity whilst on a holiday of 2+ nights
- Booked to do – Booked to take part in during a holiday in next 12 months
- Interested – Interesting in doing the activity on a holiday in the future
- Participation/Interest – Net of Done/Booked/Interested

Source: Experiences Research 2019

Multi-Day Experiences - Exploring the Opportunity for these Experiences

While very different experiences, travellers make a conscious decision to do these types of holiday – and they can be the main reason for going on holiday / choosing a destination. They are both multi-day experiences with a clear home in a rural setting

Remote Wellness Retreat *– spend quality time relaxing away from technology*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	7
Australia	12
China	4
Germany	5
Spain	6
France	10
Italy	6
Netherlands	12
Norway	6
Sweden	8
United States	11
UK	8

1. **Interest is relatively high** across the markets
2. England is not yet seen as the natural host - 37% of those who express interest in doing in England state that **other countries have better experiences on offer** or they are **more likely to book in another country**
3. For some inbound markets (particularly, Australia, Netherlands and the US) there are more barriers to doing it England – **distance to travel, or something they could do at home**
4. Cost and the weather are other barriers to doing in England – and there is an expectation that it will be a **luxury experience**, albeit not all want to stay in a 5* hotel, mid-range and cottages also appeal

Volunteering or working holiday *– spend time helping to restore or preserve a historic site*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	19
Australia	19
China	19
Germany	24
Spain	20
France	22
Italy	16
Netherlands	18
Norway	15
Sweden	19
United States	17
UK	18

1. This is a very **niche** experience across all markets
2. Seen as a good way to find out about the **history and culture** of the place and a way to **create memories** of the holiday
3. Clear benefits for personal growth, but getting the **balance between working / leisure will be key** – those who partake in this experience are also more likely to want to attend specific events such as music festivals or do challenge / action based activities
4. **Weather is a key barrier** to doing in England but, cost is less of barrier compared to other experiences
4. **Word of mouth** is particularly important in this space

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

Source: Experiences Research 2019

Niche Appeal Experiences - Exploring the Opportunity for these Experiences

Fossil Hunting *– explore and uncover history with an expert guide*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	16
Australia	14
China	22
Germany	14
Spain	18
France	18
Italy	15
Netherlands	14
Norway	14
Sweden	21
United States	18
UK	14

1. **Relatively niche interest**, with much lower interest in China and Sweden
2. There is a relatively good understanding of where they would go to do this experience in England (although doesn't fall into a specific region) – being **specific unique to that area**
3. It is seen as something that **connects to local culture and history** – and a **family activity**.
4. **Strong interest in doing 'Guided Nature Experiences'**, so possibility that this is a sub-set of this main high interest experience
5. **Weather in England is a key barrier**, and level of difficulty of an experience like this has needs to be conveyed to potentially attract a wider audience

Street Art *– meet street artists and have a go yourself at a wall mural*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	15
Australia	17
China	16
Germany	13
Spain	13
France	13
Italy	10
Netherlands	16
Norway	18
Sweden	22
United States	12
UK	23

1. Relatively niche interest, with a much **lower interest in Sweden and the domestic market**
2. Seen as an **experience that would be done in the capital city**, followed by a another large town or city
3. It is seen as a 'must do' experience – but **London has a particular pull**

- ✓ Popular, opportunity to see urban spaces
- ✓ Exclusivity factor- see something unseen, lesser known
- ✓ Felt to focus around seeing authentic side to a place
- ✓ Banksy is a famous British icon of this type of art, so gives it an authentic link
- Expected to take place in a large city eg London, Manchester, Leeds

kubi kalloo

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

Source: Experiences Research 2019

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Niche Appeal Experiences - Exploring the Opportunity for these Experiences

Foraging Experience *– expert led course to find food in the wild*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	17
Australia	18
China	14
Germany	16
Spain	15
France	17
Italy	20
Netherlands	17
Norway	22
Sweden	17
United States	23
UK	17

1. While not seen as authentic or unique to England, among those interested, if offers the **chance to do something they can't do at home**
2. Those interested in this experiences are also interested in outdoor pursuits and experiencing rural life & scenery – it **does not fit with the other food & drink experiences**
3. **Weather** in England is a key barrier, and could be seen as a **strenuous activity**

Guided Fishing Experience *– to catch and cook your own dinner*

Interest in doing experience in England	Ranking (out of 24 experiences)
All Inbound Markets	20
Australia	20
China	13
Germany	18
Spain	23
France	16
Italy	21
Netherlands	20
Norway	19
Sweden	16
United States	19
UK	24

1. While not seen as authentic or unique to England, among those interested, it is seen as something that can **help create memories** of the holiday, **offering a chance to do something they can't do at home**
2. It has the power to drive those interested in this experience to England if awareness of England can be improved
3. **Weather** in England is a key barrier

✓ A small number saw opportunity to eat freshly caught fish as an exciting and adventurous experience.

• Perceived to be a specialist activity for those that enjoyed fishing. Some suggested making local recipes such as fish and chips for example to broaden appeal.

x Some turned off by activity, they were uncomfortable with killing and eating the fish.

kubi kalloo

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

Source: Experiences Research 2019

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