

Authentic Craft Workshop – Learn a traditional local craft with an expert



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	★★★★☆

AUTHENTIC CRAFT WORKSHOP: SUMMARY

LEARN A TRADITIONAL LOCAL CRAFT 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

- + Females
- + BuzzSeekers, Cultural Buffs (Inbound)
- + Family activity, also with children

Similar Skill-Based Learning Experiences

(included in the research)

- Photography class
- Shadowing experience



ENGLAND APPEAL

- Connection with this activity and **places outside of London** – felt to be part of **regional English heritage**
- Felt to be **fun**, something nice to try out and take part in and hence has wide appeal across traveller types and age groups



CHALLENGES

- Needs to be something that **cannot easily be done at home** to make it an appealing holiday activity
- It is not currently seen as a driver of destination choice, however specific activities with a link to an individual area may alter this, particularly if several experiences are offered
- It is more associated with **lower cost accommodation** (B&B's, guest houses) so the experience will need to be reasonably priced



OPPORTUNITIES

- Through the activity, the location and the tools used, this activity can be **both uniquely English** and can provide **strong cultural and historic connections**.
- It is a particularly appealing activity for visitors from China



* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



AUTHENTIC CRAFT WORKSHOP: SCORECARD METRICS

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ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	60%	11	
All Inbound Markets	47%	13	100%
Australia	52%	13	6%
China	80%	5	4%
Germany	33%	19	13%
Spain	42%	14	11%
France	43%	12	18%
Italy	45%	13	9%
Netherlands	29%	13	6%
Norway	33%	13	2%
Sweden	33%	12	3%
United States	62%	10	27%

* Based on IPS 2017 FY data

Indicates where ranking is

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

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	17% ↓	13%
Other countries have better experiences	15%	9%

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

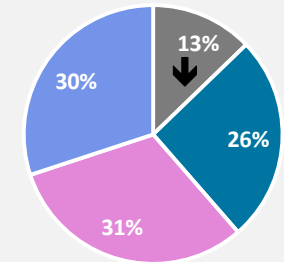
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	14%	14%
AUTHENTIC to England	19% ↑	21%
Immerse in CULTURE / HISTORY	28% ↑	24%
Create distinctive MEMORIES	27%	30%
CHALLENGE - Something they can't do at home	20%	31%

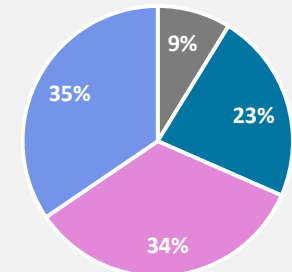
INFLUENCE ON HOLIDAY DECISION

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

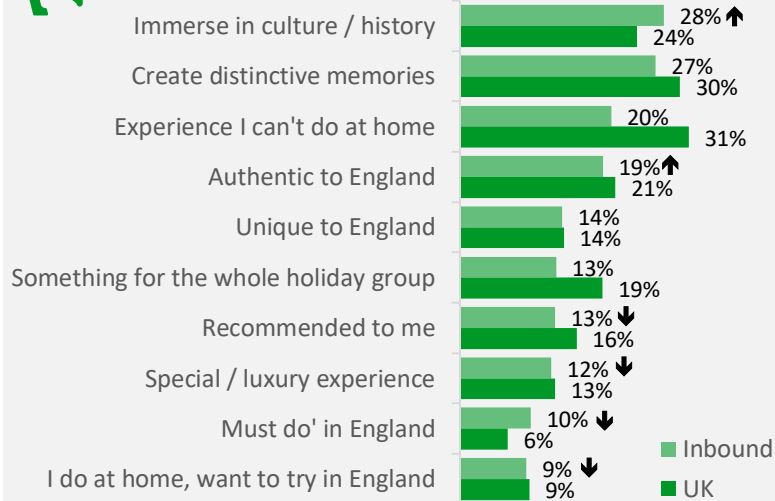


AUTHENTIC CRAFT WORKSHOP: OPTIMISING THE POTENTIAL



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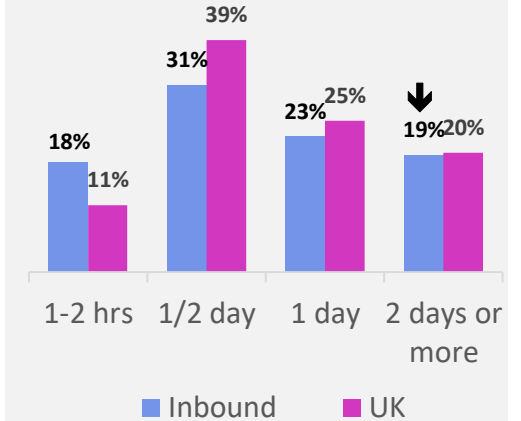
MESSAGES TO AMPLIFY



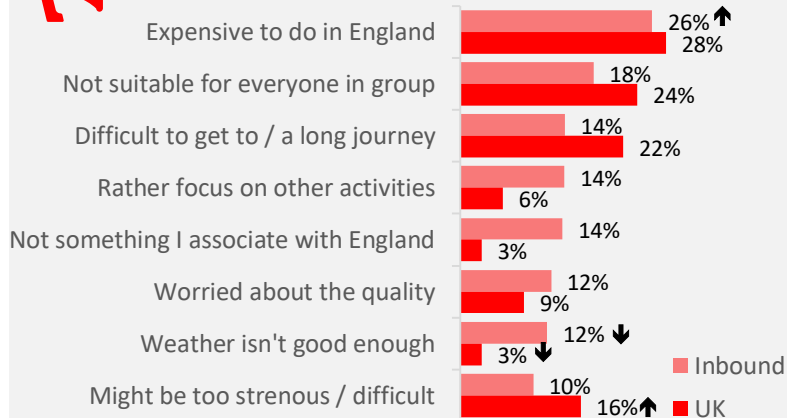
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Other learning experiences – 30%	Exploring history & heritage – 36%
Exploring history & heritage – 28%	Other learning experiences – 32%
Other experiences of interest	
'Life behind the scenes' – 85%	'Life behind the scenes' – 84%
Street food tour & tasting – 85%	Distillery or brewery experience – 82%

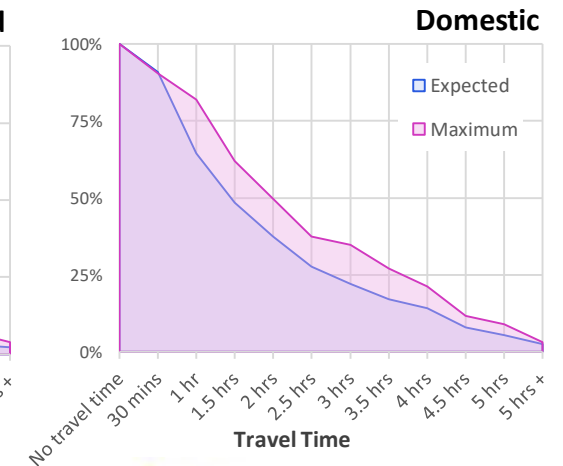
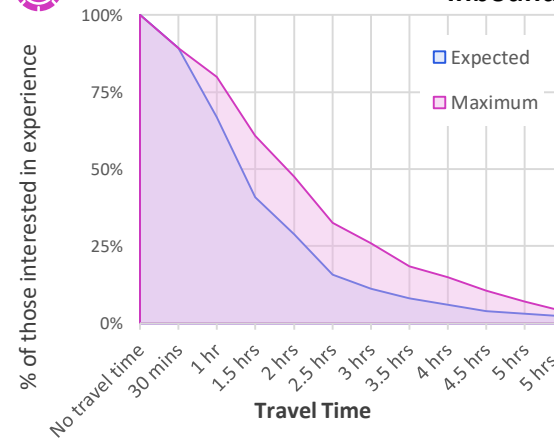
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



AUTHENTIC CRAFT WORKSHOP: BOOKING BEHAVIOURS

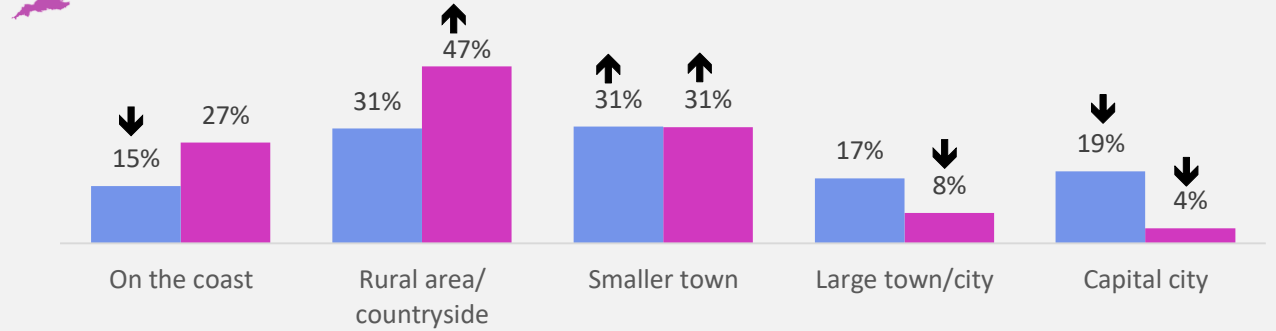
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RESEARCH CHANNELS

	Inbound	UK
General internet search	34%	51%
Traveller Review Site	25%	27%
Tourism Office	25% ↑	30%

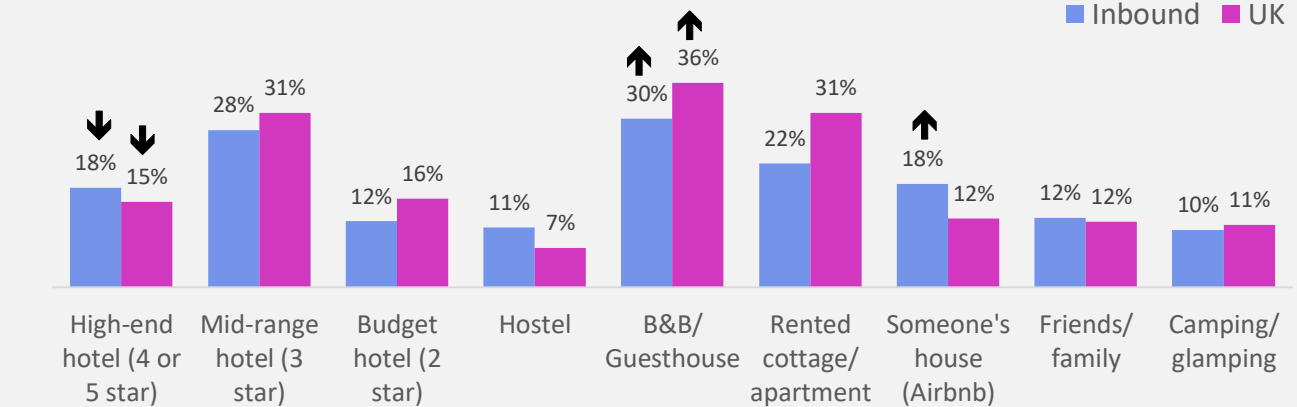
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	55%	58%
Booked in destination	31%	26%

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



AUTHENTIC CRAFT WORKSHOP: GO TO MARKET CHECKLIST



LEARN A TRADITIONAL LOCAL CRAFT WITH AN EXPERT

Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Yes	Immersion in authentic English crafts & skills
Current country ownership of the experience	None	Each country has it's own local crafts and skills
Provide enrichment , fun, challenge or learning	Yes	Each specific craft will offer fun, learning, challenge at different levels.
Create distinctive memories to keep and share	Yes	Particularly if there is a 'take-home' product
Provide cultural or historical immersion	Yes	The craft itself can be supported by choice of location, guides etc.
Expert-led or self-guided option	Expert-led	Genuine skill and surround knowledge will prove authenticity. Personalised teaching may be a higher price option
Need to mitigate for the weather	Potentially	Dependent on craft. Packaging of several craft options to mitigate for weather may be advantageous
Established, known and understood experience	Dependent on Craft	The broad concept is understood, individual classes may need more introduction if it is a little-known craft
Accessing the target audience	Variable	Audience will vary by craft type – important to identify and target the 'right' travellers
Bookable product	Yes	Part of a learning package, positive reviews are essential
Local promotion and in-destination bookings	Important	Local tourist information, accommodation providers and local recommendation are all important to drive in-destination bookings
Acceptable journey times	Short	Most people expect this activity to be very close to where they are staying
Fixed duration or variable length activity	Half-day	Most expect a half-day experience, though a longer option could be available combining several crafts
Packaging with other activities	Opportunity	Other learning experiences, history & heritage, 'life behind the scenes' etc.