

## Foraging Experience – Expert led course to find food in the wild

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# EXPERIENCE DASHBOARDS

A guide to using these dashboards and the data they contain

## DEF Experiences Research 2018/19

Online survey in UK & 10 leading inbound markets  
Fieldwork January/February 2019

- 1000 interviews in each country (Norway/Sweden – 500 in each)
- All sample non-rejectors of holiday travel to England
- **UK** – leisure breaks of 2+ nights in England
- **Australia, China, US** – Long-haul leisure travellers
- **Germany, Spain, France, Italy, Netherlands, Norway, Sweden** – Short-haul leisure travellers

Learning from the exploratory qualitative research in Germany, Australia and US in Q4 2018 also included where applicable

## Experience Dashboards

Individual dashboards for each of the 24 experiences tested  
Each dashboard provides

- insight into the appeal of the experience in England
- details of traveller behaviour with regard to the experience's influence on holiday decisions, the booking process, accommodation preferences and journey times
- An assessment of the opportunities and threats to the development of the experience in England for both the domestic and inbound markets

Learning from the individual experiences tested can be applied to other similar experiences that may be developed

## Key Metrics Included



The ranks show on each page and in the summary table are based on the overall level of interest (done in the past, booked to do and interested in doing in future) compared to the other 23 experiences tested

The **'Share of Inbound Volume'** percentage is based on those interested in the experience in England as a percentage of the total volume of holiday visitors from each country visiting England in 2017 (source: IPS). The percentage shown is based on the total of the 10 inbound markets included within this research

## EXPERIENCE SCORECARD

The **Experience Scorecard** shows how the experience performs on the key attributes that impact the potential for experience in England.

**England Appeal** – the level of interest in the experience in England

**Experience Maturity** – the extent to which the experience is established as a holiday leisure activity





**Authentic/Unique** - elements of the experience that increase its appeal and value to tourism in England

**History/Culture** – the extent to which the experience connects with England's heritage. The importance of this attribute will vary by experience type

**Influence on holiday decision** – highlighting whether the experience will drive decisions or if it is seen primarily as an 'add-on' activity

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

### EXPERIENCE SCORECARD METRICS\*

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

**DEMOGRAPHIC SKEWS**

- + under 35s and 35-54s
- + Males
- + Adventurers (Inbound)
- + activity to do with children

- Other Niche Experiences** (included in the research)
- Street art
  - Fossil hunting
  - Guided fishing experience

### ENGLAND APPEAL

- Niche appeal, among those who are looking to re-connect with nature. It is an experience offered in many countries, sometimes as an urban activity so needs to be clearly described
- Those interested in this experiences are also interested in outdoor pursuits and experiencing rural life & scenery – it **does not currently fit with the other food & drink experiences**

### CHALLENGES

- Not unique to England, though no country specifically owns it
- Not a driver of destination choice
- **Weather** in England is a key barrier and would need to be mitigated for
- Clear communication of experience – level of exertion, suitability for children

### OPPORTUNITIES

- While not seen as authentic or unique to England, among those interested, it offers the **chance to do something they can't do at home**
- Good countryside fit – accessible for inbound
- Could appeal to both **food enthusiasts if a cooking and tasting element included** and nature lovers. This would make it a more distinctive and authentic experience.



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

# FORAGING EXPERIENCE: EXPERIENCE SCORECARD METRICS

EXPERT LED COURSE TO FIND FOOD IN THE WILD



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	54%	17	
<i>All Inbound Markets</i>	42%	17	100%
<b>Australia</b>	46%	18	6%
<b>China</b>	76%	14	4%
<b>Germany</b>	37%	16	16%
<b>Spain</b>	41%	15	12%
<b>France</b>	39%	17	18%
<b>Italy</b>	36%	20	8%
<b>Netherlands</b>	23%	17	5%
<b>Norway</b>	28%	22	2%
<b>Sweden</b>	27%	17	3%
<b>United States</b>	49%	23	24%

\* Based on IPS 2017 FY data

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

## ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	22%	7%
Other countries have better experiences	16%	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

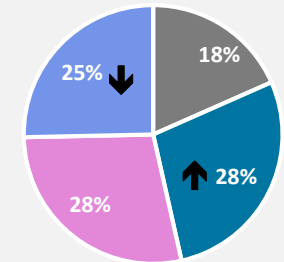
Components experiential providers should emulate or amplify to encourage travellers to participate in England

	Inbound	UK
<b>UNIQUE</b> to England	14%	16%
<b>AUTHENTIC</b> to England	16%	16%
Immerse in <b>CULTURE / HISTORY</b>	18%	13%
Create distinctive <b>MEMORIES</b>	25%	28%
<b>CHALLENGE</b> - Something they can't do at home	21%	30%

N.B. No significant differences are evident for these metrics for foraging

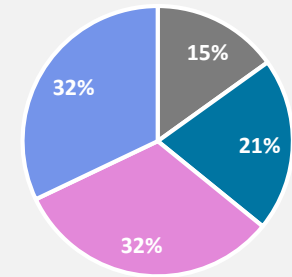
## INFLUENCE ON HOLIDAY DECISION

### 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

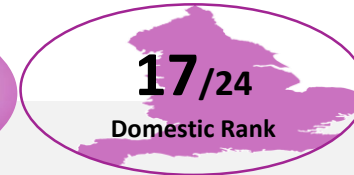
↕ Significantly worse than other experiences



Source: Experiences Research 2019

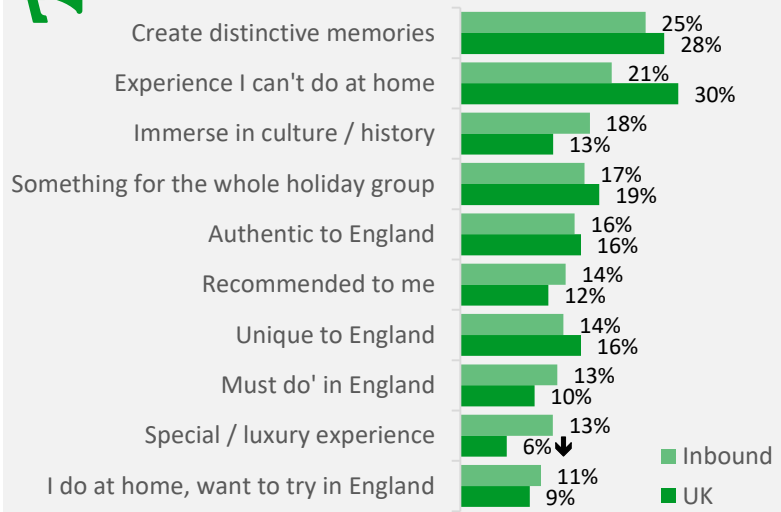


# FORAGING EXPERIENCE: OPTIMISING THE POTENTIAL



## EXPERT LED COURSE TO FIND FOOD IN THE WILD

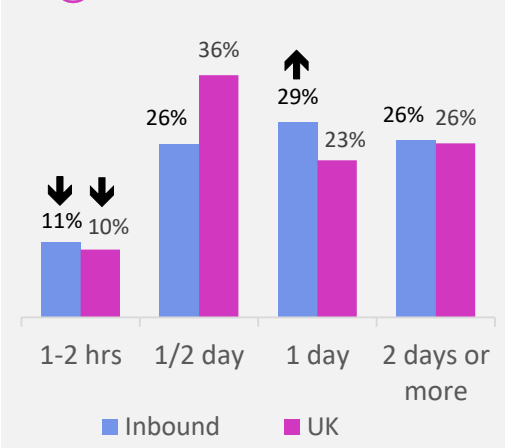
### MESSAGES TO AMPLIFY



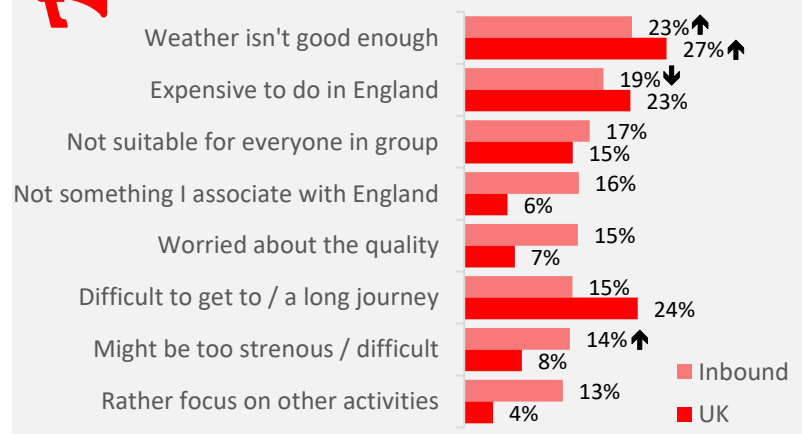
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Experiencing rural life / scenery – 30%	Experiencing rural life / scenery – 45%
Other learning experiences – 22%	Visiting a park or garden – 28%
<b>Other experiences of interest</b>	
Street food tour & tasting – 87%	Street food tour & tasting – 85%
Guided nature experience – 87%	Distillery or brewery experience – 84%

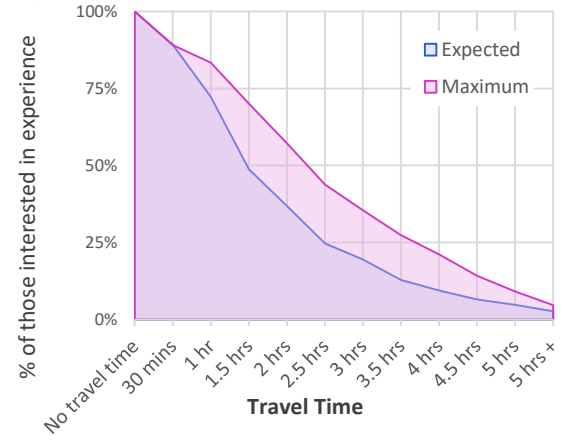
### EXPERIENCE DURATION



### BARRIERS TO ADDRESS



### TRAVEL TIME



### Domestic





# FORAGING EXPERIENCE: BOOKING BEHAVIOURS

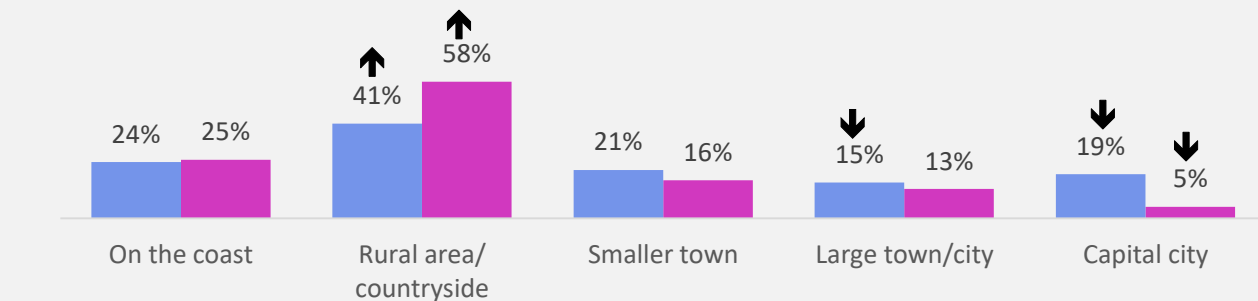
EXPERT LED COURSE TO FIND FOOD IN THE WILD



## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>33%</b>	<b>51%</b>
Traveller Review Site	<b>25%</b>	<b>26%</b>
Travel Guidebook	<b>22%</b>	<b>15%</b>

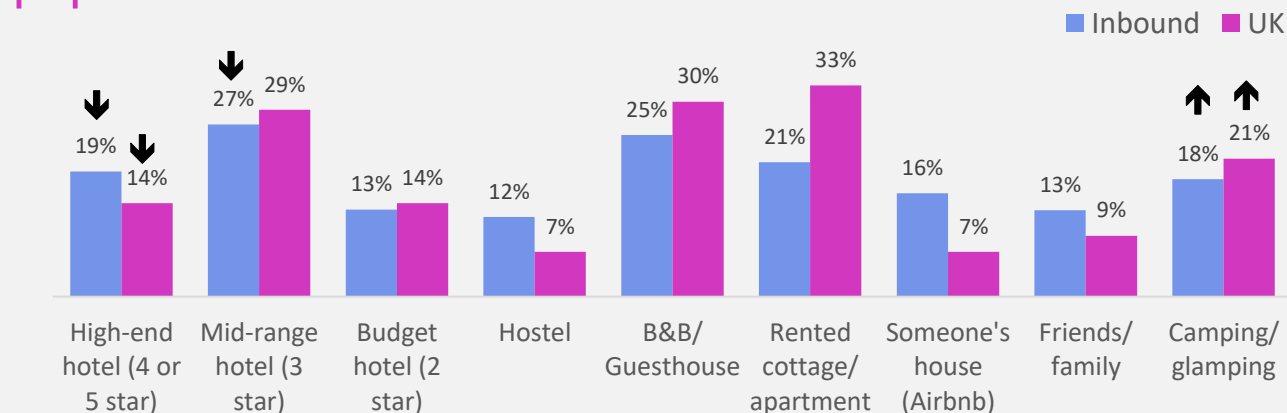
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>56%</b>	<b>65%</b>
Booked in destination	<b>30%</b>	<b>24%</b>

## ACCOMMODATION TYPE



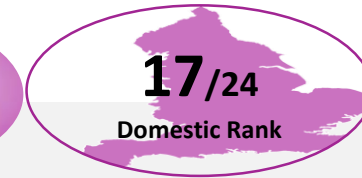
Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# FORAGING EXPERIENCE: GO TO MARKET CHECKLIST



## EXPERT LED COURSE TO FIND FOOD IN THE WILD

Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Yes	Dual opportunity from both native English plants and English cookery
Current <b>country ownership</b> of the experience	None	Offered in many countries. Can be unique to any host country
Provide <b>enrichment</b> , fun, challenge or learning	Yes	Careful positioning of whether the experience is primarily fun or educational will be important
Create <b>distinctive memories</b> to keep and share	Yes	Particularly if delivered as a family or group experience
Provide <b>cultural</b> or <b>historical immersion</b>	Potential	Overlay the history of how the food items were discovered or used in the past
<b>Expert-led</b> or self-guided option	Expert-led	Expert-led and personalised allows for increases in pre-booking and price, though self-guided alternatives may be an option
Need to mitigate for the <b>weather</b>	Yes	Either through offering bad-weather alternatives (indoor experiences) or provision of bad-weather clothing etc.
<b>Established, known</b> and <b>understood</b> experience	Limited	Exact details of the activity may not be clearly understood and should be communicated
Accessing the <b>target audience</b>	Younger or families	Clear positioning and targeting – adults or children, expert or casual, relaxed or strenuous etc.
<b>Bookable product</b>	Potential	Via travel trade as part of a package. Positive reviews are important
Local promotion and <b>in-destination bookings</b>	Essential	Through local travel guides, promotion and advocacy
Acceptable <b>journey times</b>	Short	As an add-on activity people will take part if close to where they are staying rather than it being a driver of destination choice
<b>Fixed duration</b> or <b>variable length</b> activity	½ day or more	Depending on ‘seriousness’ of experience and target audience
<b>Packaging</b> with other activities	Potential	Options for bad weather alternatives, other food & drink experiences