



CONTENTS

PAGE

1. INTRODUCTION	3
2. SETTING THE SCENE	3
3. WHAT THE VISITOR WANTS	4
4. WHAT DO VISITORS DO WHEN THEY'RE HERE?	5
4.1 Activities	5
4.2 They came, they saw, but what attractions really caught their eye?	5
5. JUST LOOK WHAT'S ON OUR DOOR STEP!	6
5.1 How did our learning holiday providers fair during 2009?	7
6. OUR CURRENT POSITION	8
6.1 Strengths	8
6.2 Weaknesses	8
6.3 Opportunities	8
6.4 Threats	9
6.5 Who goes on learning holidays these days and how do they book?	9
6.5.1 Broad appeal of soft learning	9
6.5.2 Young adults seek harder holiday learning	10
6.5.3 How do they book?	10
7. SOURCES	10
8. DEFINITIONS	10

1. INTRODUCTION

Learn-to holidays have been cited as a wonderful way to combine sightseeing with knowledge development. They offer a wide range of experiences, including crafts; cookery; activities; languages; sports; painting; music; and many more. They are often operated by worldwide specialists committed to the local environment & communities.

From astronomy to gastronomy, Northern Ireland (NI) features a fantastic range of creative and inspirational breaks that offer visitors the chance to learn something new or just have fun. However, at present, NI is not a top choice for learning holidays. This is simply because there is not enough information out there about what we have to offer!

So how can we in NI capitalise on this growing trend in the thirst for knowledge and experience?

This paper provides an overview of trends, strengths and weaknesses, consumer dynamics and likely future developments within the 'learning holidays' sector. We hope that it will provide invaluable information and some suggestions that will help you give our visitors a more authentic and 'edutaining' experience!

2. SETTING THE SCENE

In recent years, an increasing number of holidaymakers have been looking for something a little bit more than simply a fortnight of rest and relaxation.

Indeed, according to findings from **Mintel's Learning from my Holiday - UK - August 2009 report**, 'fly and flop' vacations are becoming somewhat passé and specialist learning holidays – that is holidays that offer visitors an opportunity to learn creative, linguistic, sporting or other skills – are the wave of the future.

Other highlights from the report show that:

The demand for learning holidays is on the rise¹

- 36% of adults believe educating themselves about the place they're visiting is an important part of their holiday experience
- 20% said they enjoy learning new skills on holiday
- 59% of adults say they have visited a museum during their travels

Further to this, **The Centre of Future Travel Studies, Niche Travel Report, May 2007** suggests learning a new skill on holiday is forecast to be the number 1 growth market.

Visitors participate in a broad range of activities while on holiday²

- An estimated 7.1 million adults (11%) have learnt a new sport or game while on holiday in the past three years
- 4.6 million (9%) have learnt a language
- 6.6 million (13%) have learnt a new skill
- 3.1 million (6%) have attended a course

Several segments within this travel category are poised for dramatic growth

According to **Mintel** three of the fastest-growing segments in the specialist learning holiday sector are

- **photography holidays:** driven by huge expansion of accessible digital technology
- **culinary holidays:** generated by the rise in foodie-ism, the celebrity chef factor and growing interest in ethnic cuisine and gastro-tourism
- **dance holidays:** again the influence of the celebrity culture is a key reason, with the popularity of the BBC series **Strictly Come Dancing**

For the purposes of this report, the term 'learning holidays' encompasses a wide range of activities, from what could be termed 'soft' learning to 'hard' learning. 'Softer' learning refers to more relaxed and gentle learning experiences such as visiting cultural and heritage sites, or attending cookery classes and tours. 'Harder' learning includes activities such as sports where there is a more extreme element involved.

Interestingly, according to **Tom Rees**, a senior Travel and Tourism Analyst at **Mintel**, the long-term ageing of the population supports the further growth of softer holiday learning – especially amongst ABC1 retired people.

3. WHAT THE VISITOR WANTS

According to Mintel, the twin pillars of today's travel and tourism market are purity and authenticity – the enjoyment of local food and drink, visiting cultural sites or venues, meeting new people and getting back to nature.

Holidays have progressed beyond the generic beach product or the simple guarantee of sun. People are more confident, and they are hungrier than ever for new experiences. They want to learn about the destination they're visiting. Indeed, **The World Tourism Organization (WTO)** likes to idealise tourism as 'an exchange of cultures and ideas'.

Today's travellers demand "real" experiences – from immersion into local cultures, to personal access and privileges beyond the ordinary. They want genuine experiences and locally inspired activities.

"We attract from all ages and communities. However, in recent years we've seen an increase in interest from overseas visitors who want to learn about culture and politics. We're keen to develop this market further."

REPRESENTATIVE, THE JOHN HEWITT SOCIETY

Lifelong learning is becoming more and more attractive as people concern themselves with gaining as many skills as possible to increase their knowledge and broaden their horizons. We've identified several drivers that shape the importance of learning in society.

These include:

- **The desire to explore and open up new vistas of experience.** Visitors want to find themselves and learn something different – to paraphrase another American creation – The X-Files – 'the truth is out there'
- **Learning the language** can help tourists delve deeper into a country's culture and makes for a far richer experience. Research shows that language learning trips are being increasingly combined with activities such as golf, sailing and fishing

"Our customers mainly come from France, Spain and Italy. They want to practice their English language skills and also take part in sporting and cultural activities. Golf, outdoor adventure, sailing, fishing and food related activities are amongst the most popular."

REPRESENTATIVE, NORTHERN ISLAND

- Visitors want to **engross themselves in the culture**, they want to gain memorable experiences; they want to dip into something rich and new. Observing and viewing is too simple; interaction and emotional connection is what's desired
- Busy families **need time out to revitalise their family bonds** through structured activities – the latest trend in family holidays is the skill-cation.

"Visitors are able to learn skills that they can take home and use every day. It provides a fantastic opportunity for families to bond, to rejuvenate their spirit and to escape from the stresses of daily life."

REPRESENTATIVE, ORCHARD ACRE FARM

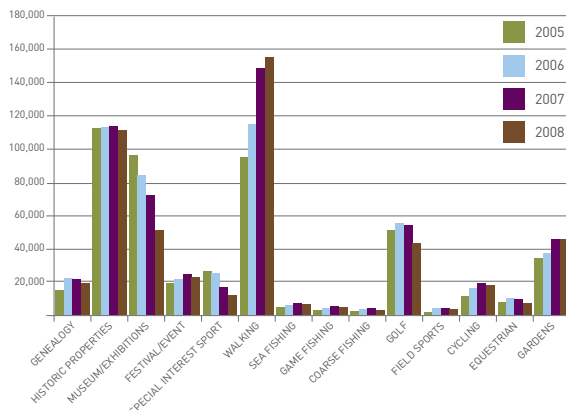
- Visitors want **value for money** but may still choose a first-class experience over budgeting
- **Consumers want to be 'edutained', not educated!** For tourism providers, the trend toward delivery of learning within an informal, relaxed, social and fun context offers great opportunities, but it is important to get the balance of education and entertainment right for different groups of customers.
- There is a **brag element involved in learning something new on holiday.** Travelling is simply no longer a case of destination name dropping, it's whether visitors have learnt a new language, made an authentic, beautiful piece of pottery or beauty products from the garden. Vanity persists in the holiday market and every traveller has 'peacock' tendencies!

4. WHAT DO VISITORS DO WHEN THEY'RE HERE?

4.1 Activities

'Soft' and 'hard' activity holidays present an opportunity for purity of body, mind and destination. They offer visitors a chance to carry back new experiences and desires into their everyday lives – in the form of newly-acquired skills, hobbies and interests.

FIGURE 1:
ACTIVITIES UNDERTAKEN BY VISITORS TO NI, 2005-2008



Source: Northern Ireland Passenger Survey (NIPS)
Excludes ROI visitors and visitors entering via ROI
The above figures are derived from survey estimates and Extreme Caution should be exercised in drawing conclusions, particularly where the smaller special interest and activity products are concerned.

In NI in 2008, the two most popular 'soft learning' activities were visiting historic properties and museums/exhibitions. This suggests that when visitors come to NI they want to explore our history and our customs; they want to gain a deeper understanding of the life of local NI people.

In terms of 'harder' activities, as indicated in Figure 1, walking has shown a dramatic increase in popularity from 2005-2008. This suggests that walking is fast becoming an increasingly popular activity while on a holiday in NI. It allows visitors to enjoy our scenery and beautiful landscape as well as explore off the beaten track and discover hidden gems.

4.2 They came, they saw, but what attractions really caught their eye?

Did you know that there are just under 300 visitor attractions in NI that attracted 9.9 million visits in 2008? The Giant's Causeway drew the biggest number of visitors, suggesting that visitors are keen to learn about the myth and legend that surrounds it. In 2008, six of the top ten attractions drew more visitor numbers compared with 2007.

FIGURE 2:
TOP 10 TOURIST ATTRACTIONS VISITED 2008
(EXCLUDING COUNTRY PARKS/GARDENS)

Rank	Attraction	Visitor numbers 2007	Visitor numbers 2008	% change on 2007
1	Giant's Causeway Visitor Centre	712,714	751,693	5%
2	Oxford Island National Nature Reserve	216,713	341,025	57%
3	W5	247,506	282,756	14%
4	Island Arts Centre	280,000	276,000	-1%
5	Belfast Zoological Gardens	294,935	275,494	-7%
6	Carrick-a-Rede Rope Bridge	222,613	241,291	8%
7	Derry Walls	213,415	215,015	1%
8	Ulster Folk and Transport Museum	168,866	190,580	13%
9	Portstewart Strand	180,312	170,333	-6%
10	Ulster American Folk Park	157,325	152,717	-3%

Source: NITB Northern Ireland Tourism facts 2008, Knowing the Visitor

Interestingly, recent research shows that out-of-state visitors are more likely to visit attractions that have a cultural and historical background, while NI residents tend to visit more relaxing, scenic attractions.

4.3 Don't sell the destination. Sell the story!

Our visitors want to hear our stories. As part of the visitor experience study implemented earlier this year, each Mystery shopper was asked to record one or more of the stories they had heard while in NI. Some of these stories have been reproduced below.

They can be factual...

"I learnt loads of things about Belfast's history but for me the detail of the troubles (seeing at first hand on the tour) plus the efforts being made to continue and develop the peace process was new and fascinating."

or a little bit whimsical...

"Whilst at the Giant's Causeway, the National Trust tour guide told us about the Giant's Granny and how she had been drinking too much whisky. The giant had told her that if she drank again then he would turn her to stone. She drank again and he chased her up the hill and turned her to stone!"

"I learnt that lots of things were invented in Northern Ireland including the ejector seat! I also learnt an old wives tale that if you kiss the blue salmon it brings you luck...I tried it just in case!"

5. JUST LOOK WHAT'S ON OUR DOOR STEP!

NI has plenty to offer when it comes to learning holidays – and there is something to fit every budget! Here are just a few...

For the combinational visitor...

As an NI-specific Learning Holidays activity provider, **Northern Island** offers a range of programmes for families, adults and children. Family programmes on offer include painting classes, local antiques and crafts tours and an Irish Breads workshop.

Adult programmes on offer include city tours with qualified English as a foreign language (EFL) teacher guides, mountain trekking and dining with a local. The children-oriented programmes offer family integration with tourism, where foreign students are matched up with a local family accompanying them on family and social outings.

Northern Island started up in 2008 and during this difficult economic climate, they have actually witnessed a growth in their visitor numbers and expect this growth to continue. They are the only company in NI offering integration with local people with each of their language learning programmes. This high level of integration is clearly a winning asset, offering an authentic and rewarding experience.

The **National Trust** offers around 400 working holidays every year across the UK. Visitors can participate in a range of activities from herding goats to drystone walling or organic gardening. Combinational choices include surfing, horse riding and digital photography. Volunteer leaders and staff are on hand to offer expert training and encouragement. Visitors can have a relaxing and enjoyable learning holiday within a leisurely working context.

For the thrill seeker...

The **Clearsky Adventure Centre** offers short breaks with tuition in different exciting activity areas such as sea kayaking with overnight trips to a small island. It's an award-winning activity provider that offers adventure days in exchange for Tesco Clubcard points for those wishing to have a fun day out on a tight budget. They cater for schools, groups, families, businesses and individuals with an adventure facility situated within the scenic grounds of the National Trust Castle Ward.

For the educational visitor...

The **Foyle Language School** takes a structured approach to English Language Learning but presents it in a welcoming, comfortable, family environment situated in the beautifully scenic city of Derry, Co. Londonderry, encapsulated by its historical and political background. It not only wants its students to simply learn English, but to learn English within a culturally inspirational place.

According to **Fáilte Ireland**, the EFL (English as a foreign language) sector is worth approximately €300m to the Irish economy. There are currently over 130,000 students coming to Ireland every year to take part in various English language courses!

For the artistic visitor...

Ballydougan Pottery offers creative learning holidays. Visitors can stay at one of its courtyard self-catering cottages, enjoy afternoon tea at the Linen Barn coffee shop and get the opportunity to make an authentic, beautiful piece of pottery. As well as craft workshops where visitors can create their own unique pieces to take home, there are group visits and demonstrations where they can have a fully guided tour of the pottery and workshops.

For the foodie...

Visitors can learn to cook a local treat at the **Belle Isle Cookery School** where they can take part in recreational courses, diploma courses and corporate activity days. Liz Moore is a local celebrity chef with a school designed especially to create a light and airy area work environment. The school has a good reputation and is highly recommended for whipping up culinary delights.

Orchard Acre Farm offers learning-based activities on the core theme of good food. Activity centres around the award winning Eco Barn and demonstration gardens where students can participate in cookery classes, growing food courses and even making beauty products from the garden! Teresa O'Hare, a passionate foodie and skilled cook, manages the farm which specialises in personalised learning packages from tailor-made individual programmes to family and small groups. They are a new company and have experienced steady growth throughout this year. They're doing so well that they're even planning on expanding their business with on-farm accommodation!

For the green traveller...

The **Omagh Hostel** is an environmentally and family friendly hostel that markets itself as an ecotourism destination with an ethos to reduce environmental impact, work with the community and run conservation activities. Visitors can learn the in and out's of organic produce on their farm, whilst receiving educational tips on current environmental issues.

Despite the recession, there is continuous growth in all the green or sustainability aspects of holidaymaking, as well as actually participating in green activities as the main holiday activity. While not all visitors may be ecotourists, many are interested in heightening their holiday experience with small scale, low impact, culturally sensitive, sometimes nature-based educational activities. Ecotourism is no longer a fringe market.

For the stargazer...

NI has very little light pollution making it ideal for astronomy weekends. At the **Armagh Planetarium**, visitors can learn all they need to know about astronomy with successful outreach programs which take science to the schools with a portable, inflatable, 30-seater planetarium.

They have recently had a major refurbishment including a 3D theatre providing a digitally advanced Technicolor 3D experience. This level of audience participation is one of a kind and shows visitors just how extraordinary the night sky is, while putting our existence into a very real perspective.

For the historian...

Tours 'n' Trails offers a range of packaged tours to suit all travellers. The two guides, Finola and Eilish, are accredited by **Fáilte Ireland** and **NITB** and provide a passionate, enthusiastic and welcoming experience across their Derry, Co. Londonderry, Giant's Causeway and Antrim Coastline tours. Visitors can learn about the historical and political background surrounding the Walled City of Derry and hear about the myth and legend of the Giant's Causeway.

For the musician...

The **Francis McPeake Music School**, Belfast, is regarded as a place that brings individuals from the whole community together. The school believes that using traditional music will bring people back to their roots and help contribute to a process of reconciliation for the NI society.

It provides the young and the old with a sense of belonging and a deeper understanding and respect of our heritage. The school welcomes anyone who enjoys music and wants to develop and hone their musical skills. Lessons offer insights into music principles, aural perception and the chance to participate in live ensembles.

For the budding literary scholar...

The **John Hewitt Society** offers literary and cultural festivals such as the Spring Festival in Carnlough in the Glens of Antrim in April, and the International Summer School held in the last week of July in Armagh. Visitors can gain inspirational learning experiences complete with debates around poetry and politics with some of the leading literary thinkers.

For the golfer...

NI has dozens of golf courses for the keen and enthusiastic golfer such as the Royal Portrush and the Royal County Down. Our courses have nurtured some golfing legends and boast our rich cultural heritage with historical ruins and ancient walls all part of the scenery. Each course offers something unique for visitors, adding to the authentic and diverse learning experience.

5.1 How did our learning holiday providers fair during 2009?

One would assume that learning holiday specialists would struggle under the impact of recession. However, according to trades sources, learning holiday providers in NI are optimistic about the future.

“We’re optimistic about the future. The majority of our customers come from the domestic market and therefore we’ve not suffered from international marketplace declines. We’re also planning to add value to our tourist product with on-farm accommodation.”

REPRESENTATIVE, ORCHARD ACRE FARM

According to a representative at The John Hewitt Society, its Spring Festival numbers held up. The Summer School 2009 numbers were slightly down, but this may have been because they had Seamus Heaney as the main attraction in 2008. The Society is optimistic about the future because it offers a good product, has the support of the local Council/Arts Council and enjoys solid local support.

Northern Island have also been doing well...

“We started in 2008 so we were not affected negatively – our numbers have grown considerably and look set to continue in this way.”

REPRESENTATIVE, NORTHERN ISLAND

6. OUR CURRENT POSITION

6.1 Strengths

- Low cost carrier expansion has created a new generation of well-travelled consumers who

are seeking a new twist on the standard sightseeing trip

- ‘Binge’ learning and authenticity holidays enable ‘time-squeezed’ ABC1s to fully immerse themselves in a cherished hobby or explore a new interest without the everyday distractions of work
- The future growth potential for learning a new language or a new skill on holiday is apparent. There’s scope for the mainstream travel industry to add value through the provision of opportunities to learn about the destination
- Favourable population trends are likely to boost future demand for learning holidays: AB growth, the ageing of the population and fast growth in the number of singles
- In an intensely competitive job market there’s likely to be growing demand for vocationally oriented breaks – such as language learning – that can act as a fast-track catalyst for career progression and career changes
- Visitors display general curiosity about our history and culture and feel that we’ve made a success of the peace process

6.2 Weaknesses

- ‘Harder’ learning holidays currently have a fairly narrow demographic base, peaking amongst young, male adults in full-time education aged 16-24
- The learning holiday sector is an extremely fragmented market composed of many small operators meaning that small companies lack ‘voice’ in the NI market. Trade sources indicate that the sector has less leverage in the travel industry and fewer marketing resources than other holiday types

6.3 Opportunities

- Offering learning holiday packages as gifts is a great way forward. It provides a unique experience that evades the dullness of ordinary gifts and presents
- Learning holidays meet the increased demand for purity, authenticity and also for moral-rearmament; as a means to understand other cultures, avoid exploitation and to encourage deeper learning

“Northern Ireland has much to offer – provided it looks forwards instead of backwards.”

REPRESENTATIVE, THE JOHN HEWITT SOCIETY

- The learning element does not have to be the main priority of a holiday; it can be a small inclusion that will benefit the entire experience
- The industry could try to incorporate the learning experience before, during and after the holiday to allow visitors to feel engaged with the destination
- Our notoriously bad weather which is often seen as a deterrent could actually pose an opportunity. Indoor Learning activities would avoid the bad weather and make it possible for visits all year round
- NI has so much to offer and latecomers can learn from those before them and make sure that the ‘experience’ they provide is unrivalled.

“We feel it is important that Northern Ireland develops itself as a quality destination. Countries that arrive ‘late to the party’ so to speak have a valuable opportunity to learn from the mistakes made by those who came before them. In short, quality over quantity would be our vision for the future.”

REPRESENTATIVE, NORTHERN ISLAND

6.4 Threats

- Competition is fierce – destinations with pleasant weather, such as France and Spain, are alluring for many visitors whilst NI’s cold and wet climate is seen as a turn-off
- High job losses and uncertainty about the state of the economy has seen consumer confidence take a blow, and as such consumers may be less unwilling to splash out on holidays. However NI learning holiday providers do not appear to be suffering

6.5 Who goes on learning holidays these days and how do they book?

Learning holidays appeal to a wide range of visitors. But who are the key consumers for ‘soft’ cultural learning and ‘harder’, more skills-based learning on holiday?

Mintel’s research suggests that softer learning holidays have a broad appeal, whereas harder learning holiday activities are most likely to be done by those aged 16-24 in full-time education, males, ABs and ‘city folk’.

6.5.1 Broad appeal of soft learning

The two most popular ‘soft learning’ activities – museum visits and learning about the history of NI – have very broad appeal, including around half of C2DEs, and over half of all age groups, with an equal gender balance. However, there is some bias towards women and families with older children, and also amongst older teenagers.

Other cultural pursuits with a learning angle such as art exhibitions have more of a female appeal, and unlike other soft learning activities, are more likely to be taken by those without cars than those with one. It seems female travellers are more motivated to travel to learn

Consumers that go on ‘softer learning holidays’ want to go on holiday primarily to relax and are stimulated by being somewhere new. They often desire high standards of comfort.

6.5.2 Young adults seek harder holiday learning

When it comes to ‘harder’ learning activities on holiday, the market narrows significantly, and all of the activities – whether language learning/improving, sporting activity or learning new skills – share broadly similar demographic characteristics.

“Our customers are children and teenagers (8-18 years old), adults (all ages) and families travelling together (often with primary school aged children). They mainly come from France, Spain and Italy.”

REPRESENTATIVE, NORTHERN ISLAND

Harder learning on holiday generally peaks strongly amongst young single adults in full-time education aged 16-24, declining in each age group thereafter. It appeals to males more than females, ABC1s and especially AB's. Slight variations to this theme are as follows...

It seems that learning a sport/game on holiday has a smaller ABC1 bias than other types of learning, appealing more across the board to those with broader media preferences and shopping habits. The young male bias is also at its strongest here. Amongst those who have attended a course on holiday, the age group is slightly wider, peaking amongst those aged 16-34.

In conclusion, our key customers are singles, couples, friends and females.

6.5.3 How do they book?

According to **Mintel's Learning from my Holiday report**, around eight in ten adults in the core ABC1 demographic have internet access. Web 2.0 has growing power to distribute rich learning materials both pre- and post-holiday, to open up the hidden knowledge dimensions of a destination or site via video, podcast or text.

However, the digital age divide remains. This gap is likely to narrow as wired third agers move into retirement, but for the time being, operators targeting older people will need to maintain a presence offline (eg. via local clubs or broadsheet advertising) as well as online.

Success is within our reach, so let's inspire our visitors to learn something new in NI!

7. DEFINITIONS

- **Edutainment** involves embedding lessons in some familiar form of entertainment to instruct or socialise its audience. Eg. guided nature tours.
- **Soft learning** activities feature those experiences that ease an individual into the learning process. Not high energy or extreme but gentle, appealing to the senses, inspirational, eg. excursions to famous historical attractions, sightseeing.
- **Hard learning** activities focus on a more extreme, high energy, form of learning. A form of learning requiring concentration and dedication, eg. learning a language, sport or game.

8. SOURCES

- Northern Ireland Passenger Survey (NIPS), NITB, 2008
- Northern Ireland Visitor experience baseline and modeling, NITB, 2009
- Northern Ireland tourism facts, Knowing the Visitor 2008, NITB, October 2009
- Visitor Attitude Survey, NITB, 2007
- NITB Tourism Barometer 2009: Wave 2 – September
- Short Breaks report, Ireland, Mintel, July 2009
- Mintel 'Learning from my holiday' report, UK, August 2009
- Mintel 'Activity/special interest holidays', UK, April 2008
- Mintel 'Edutainment' report, UK, March 2009
- Mintel 'City and Short Breaks' report, UK, September 2007
- Mintel 'Gastronomic Tourism' report, UK, May 2009

Every care has been taken to ensure accuracy in the compilation of this paper. NITB cannot accept responsibility for emissions or errors but these will be rectified in future publications when brought to our attention. Please direct any queries to v.mccabe@nitb.com

NITB is keen to hear from you! Let us know what you think about this report, or what dynamics you see with your customers. Please send us an email (insights@nitb.com); as always, we would appreciate your feedback. Thanks!



Northern Ireland
Tourist Board

nitb.com