

Mindfulness or Meditation Class – Learn how to relax and recharge



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 | ★★★★☆ |

MINDFULNESS / MEDITATION CLASS: SUMMARY

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EXPERIENCE SCORECARD METRICS*

Star rating – low to high

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

DEMOGRAPHIC SKEWS

- + Under 35s
- + Females
- + BuzzSeekers, Cultural Buffs (Inbound)
- + done alone

Similar Niche Wellness Experiences

(included in the research)

- Tai chi experience
- Yoga experience
- Pilates experience
- Homeopathic experience



ENGLAND APPEAL

- **Niche appeal, among those interested in wellness activities**
- More interest in these activities from those who were **already familiar with them and wanted to practise them further**. Meditation is not always fully appreciated and clarity around the extent to which the proposition is connected to religion or not will be important



CHALLENGES

- **Not unique to England** – stronger associations with Asia – Japan and Thailand are popular destinations. This contributes to a perception that it would be expensive to do in England
- **Less association with this activity and holidays** - they were felt to be more serious and involved than just 'relaxing'. It therefore is less likely to drive destination choice, particularly among domestic travellers



OPPORTUNITIES

- To offer as part of a package of optional wellness experiences



* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



MINDFULNESS / MEDITATION CLASS: 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) | 56% | 16 | |
| <i>All Inbound Markets</i> | 42% | 18 | 100% |
| Australia | 48% | 15 | 6% |
| China | 69% | 18 | 4% |
| Germany | 37% | 17 | 16% |
| Spain | 37% | 21 | 11% |
| France | 34% | 19 | 16% |
| Italy | 40% | 17 | 9% |
| Netherlands | 20% | 19 | 4% |
| Norway | 36% | 12 | 3% |
| Sweden | 32% | 13 | 4% |
| United States | 56% | 15 | 27% |

* Based on IPS 2017 FY data

Indicates where ranking is higher (-4 from inbound markets)

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

| | Inbound | UK |
|---|---------|-----|
| More likely to book in another country | 25% ↑ | 10% |
| Other countries have better experiences | 21% ↑ | 9% |

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



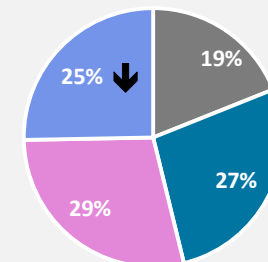
CORE COMPONENTS OF EXPERIENTIAL

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

| | Inbound | UK |
|--|---------|-----|
| UNIQUE to England | 10% | 9% |
| AUTHENTIC to England | 11% | 6% |
| Immerse in CULTURE / HISTORY | 11% ↓ | 11% |
| Create distinctive MEMORIES | 19% | 24% |
| CHALLENGE - Something they can't do at home | 15% | 21% |

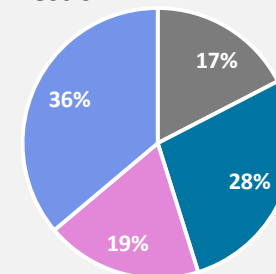
INFLUENCE ON HOLIDAY DECISION

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



MINDFULNESS/MEDITATION CLASS: OPTIMISING THE POTENTIAL



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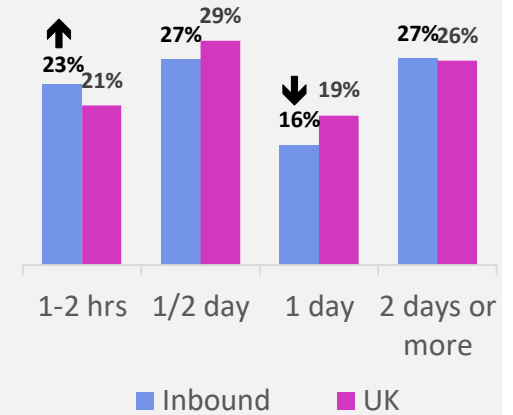
MESSAGES TO AMPLIFY



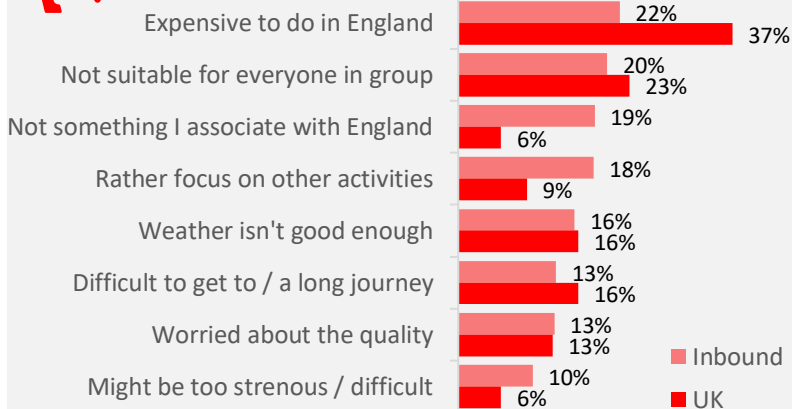
CROSS-OVER INTEREST

| Inbound | UK |
|--------------------------------------|---|
| Cross-over activities | |
| Other wellness experiences – 29% | Other wellness experience – 40% |
| Visiting a park or garden – 21% | Experiencing rural life & scenery – 28% |
| Other experiences of interest | |
| Spa experience – 94% | Spa experience – 90% |
| Remote wellness retreat – 87% | Remote wellness retreat – 88% |

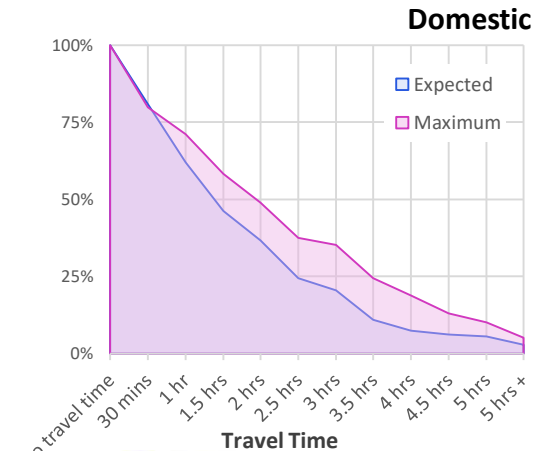
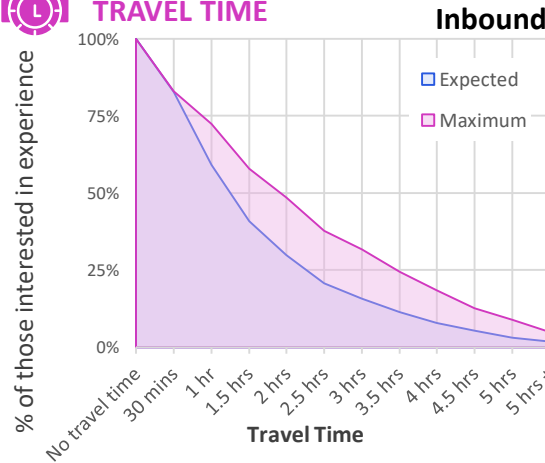
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



MINDFULNESS / MEDITATION CLASS: BOOKING BEHAVIOURS

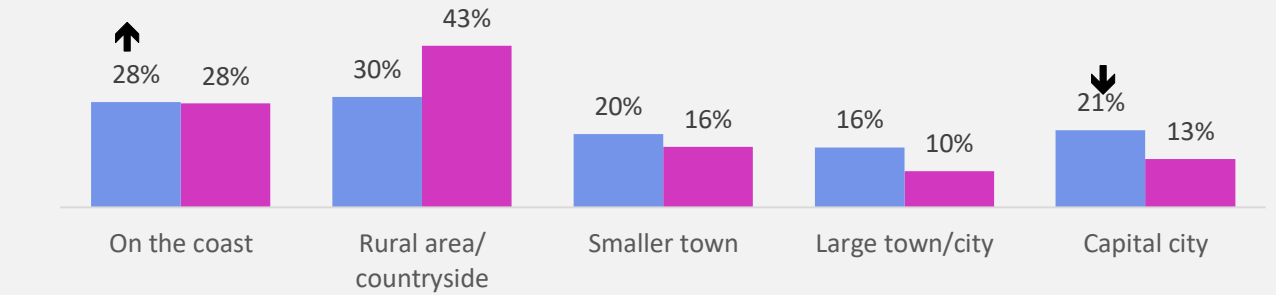
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RESEARCH CHANNELS

| | Inbound | UK |
|-------------------------|------------|------------|
| General internet search | 30% | 48% |
| Traveller Review Site | 22% | 28% |
| Travel Agent | 20% | 8% |

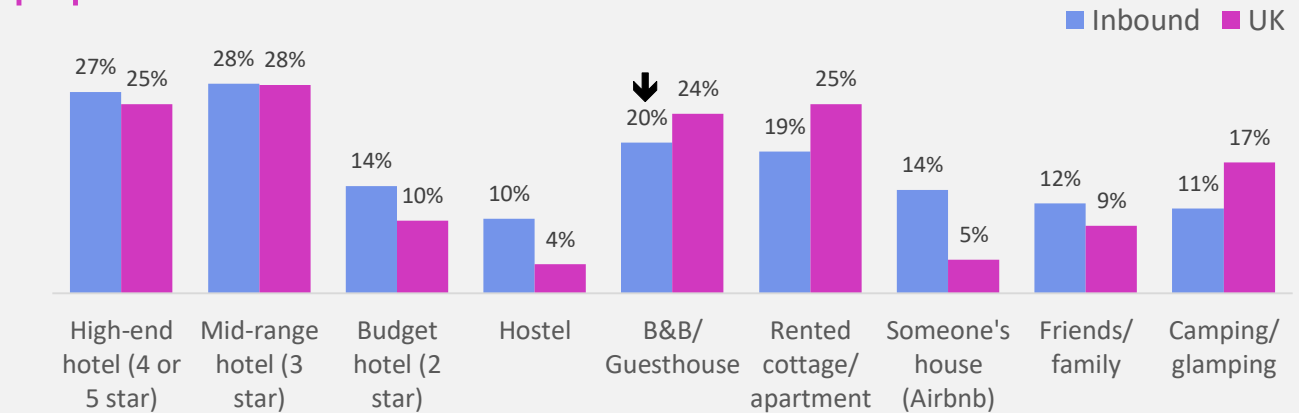
LOCATION TYPE



BOOKING METHOD

| | Inbound | UK |
|----------------------------|--------------|------------|
| Booked before leaving home | 64% ↑ | 70% |
| Booked in destination | 25% ↓ | 17% |

ACCOMMODATION TYPE



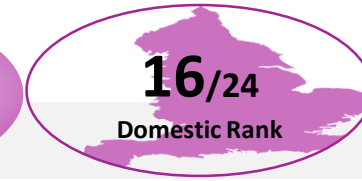
Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



MINDFULNESS / MEDITATION CLASS: GO TO MARKET CHECKLIST



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| Experience Attributes | Experience Performance | Consideration for action |
|--|------------------------|---|
| Positioning as authentic and unique to England | Low | Not seen as a English activity so need link to other authentic experiences |
| Current country ownership of the experience | Asia | Japan and Thailand are important markets. The English offer would need to be differentiated to attract bookings |
| Provide enrichment , fun, challenge or learning | Limited | Seen as a 'home' activity where it can provide enrichment, but not a natural fit for many to a holiday experience |
| Create distinctive memories to keep and share | Limited | May be achieved through location choice, but as a solo activity may not generate shared memories |
| Provide cultural or historical immersion | Limited | Location or other activities may provide link, but may not be vital for this experience |
| Expert-led or self-guided option | Expert-led | Personalisation or new techniques may offer additional value (e.g. individual tuition) |
| Need to mitigate for the weather | No | Assumed to be indoors, but an outdoor location would need a bad weather alternative |
| Established, known and understood experience | Yes | Well understood but not seen as a holiday activity |
| Accessing the target audience | Niche | Younger, females with interest in niche wellness activities |
| Bookable product | Yes | Advance bookings drive both inbound and domestic volume |
| Local promotion and in-destination bookings | Limited | Some local bookings, potentially through accommodation provider |
| Acceptable journey times | Short | Typically less than an hour if not offered by the accommodation provider |
| Fixed duration or variable length activity | Short | Most expect a 1-2 hour experience |
| Packaging with other activities | Yes | Niche audience who may choose one or more similar wellness activities in a rural location |