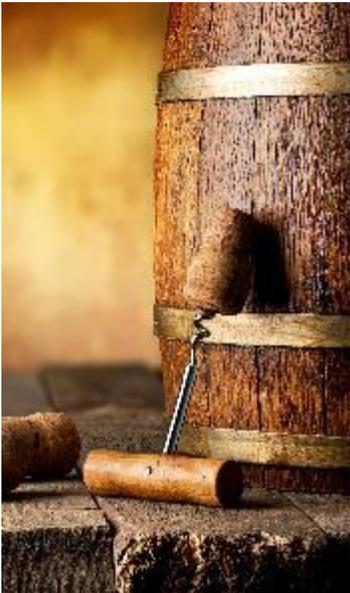


# Remote Wellness Retreat – Spend quality time relaxing away from technology

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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	★★★★☆

# REMOTE WELLNESS RETREAT: SUMMARY

SPEND QUALITY TIME RELAXING AWAY FROM TECHNOLOGY



## EXPERIENCE SCORECARD METRICS\*

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

**DEMOGRAPHIC SKEWS**

- + Females
- + Sightseers, Explorers, Cultural Buffs (Inbound)
- + Alone or couples

- Similar Experiences** (included in the research)
- Multi-day experiences:**
- Volunteering or working holiday
- Niche wellness experiences**
- Mindfulness / Meditation class
  - Yoga experience
  - Pilates experience
  - Homeopathic experience

## ENGLAND APPEAL

- **Niche appeal**, among those who are looking to ‘escape’
- **Location** is important in making it an **authentic English experience** e.g. somewhere historical with “old world charm”
- Digital detox tested in the qualitative research has appeal to those who are **concerned by overuse of technology** and the English countryside is well suited to ‘getting away’ and relaxing. However others see **staying connected on holiday as important**

## CHALLENGES

- **Not unique to England** and other countries are more suited, typically those with **warmer climates**
- It has an association with **luxury** hotels and other pampering activities which may be slightly at odd with a ‘back to nature’ concept – clarity of the individual offer will be important to avoid traveller confusion

## OPPORTUNITIES

- As a **multi-day** activity it is more likely than others to drive destination choice and there is strong association with rural and coastal locations

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



# REMOTE WELLNESS RETREAT: SCORECARD METRICS

## SPEND QUALITY TIME RELAXING AWAY FROM TECHNOLOGY



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	63%	8	
<i>All Inbound Markets</i>	54%	7	100%
<b>Australia</b>	52%	12	5%
<b>China</b>	81%	4	3%
<b>Germany</b>	56%	5	18%
<b>Spain</b>	57%	6	13%
<b>France</b>	45%	10	16%
<b>Italy</b>	61%	6	11%
<b>Netherlands</b>	31%	12	5%
<b>Norway</b>	49%	6	3%
<b>Sweden</b>	37%	8	3%
<b>United States</b>	61%	11	23%

\* 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	24% ↑	10%
Other countries have better experiences	21% ↑	10%

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



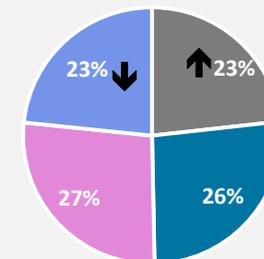
### CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	10%	7%
<b>AUTHENTIC</b> to England	12% ↓	10%
Immerse in <b>CULTURE / HISTORY</b>	12% ↓	9%
Create distinctive <b>MEMORIES</b>	25%	23%
<b>CHALLENGE</b> - Something they can't do at home	17%	28%

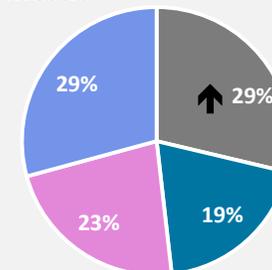
### INFLUENCE ON HOLIDAY DECISION

#### 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



# REMOTE WELLNESS RETREAT: OPTIMISING THE POTENTIAL



## SPEND QUALITY TIME RELAXING AWAY FROM TECHNOLOGY

### MESSAGES TO AMPLIFY



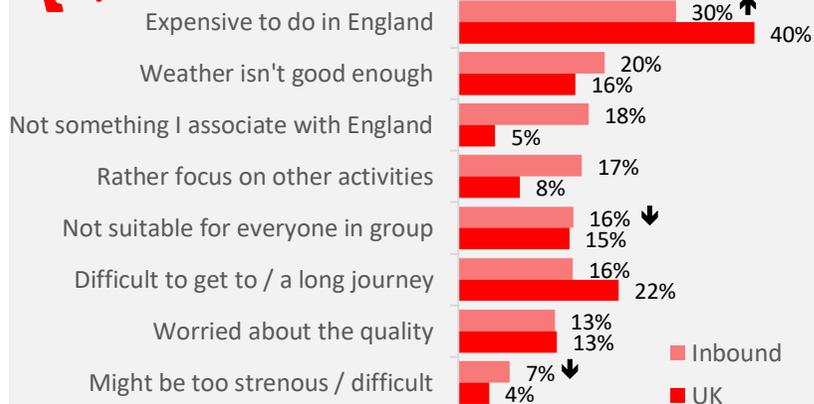
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Other wellness experiences – 43%	Other wellness experiences – 44%
Experiencing rural life & scenery – 32%	Experiencing rural life & scenery – 35%
<b>Other experiences of interest</b>	
Spa experience – 86%	Spa experience – 92%
Street food tour & tasting – 83%	Chocolate making class – 80%

### EXPERIENCE DURATION



### BARRIERS TO ADDRESS



### TRAVEL TIME



### Domestic



# REMOTE WELLNESS RETREAT: BOOKING BEHAVIOURS

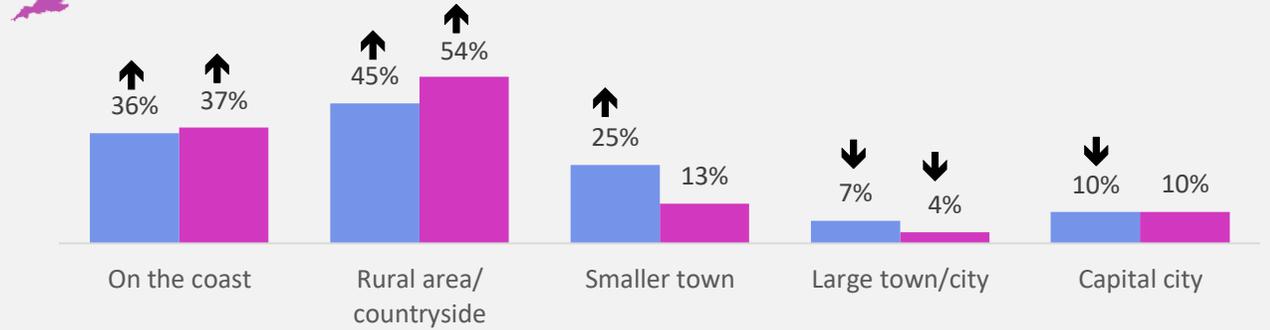
SPEND QUALITY TIME RELAXING AWAY FROM TECHNOLOGY



## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>35%</b>	<b>51%</b>
Traveller Review Site	<b>29%</b>	<b>23%</b>
Accommodation / hotel website	<b>23% ↑</b>	<b>29%</b>

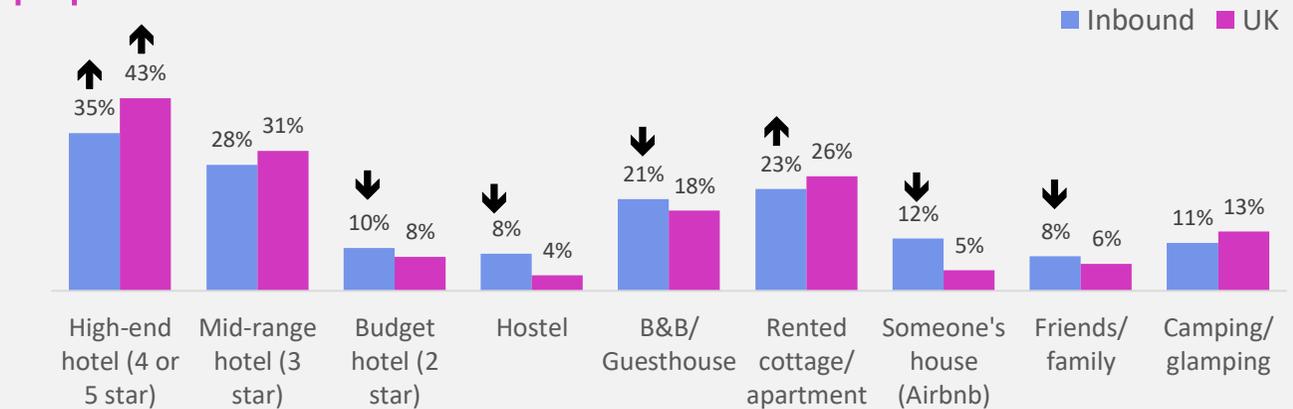
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>72% ↑</b>	<b>79% ↑</b>
Booked in destination	<b>17% ↓</b>	<b>10% ↓</b>

## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# REMOTE WELLNESS RETREAT: GO TO MARKET CHECKLIST

SPEND QUALITY TIME RELAXING AWAY FROM TECHNOLOGY



Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Yes	Driven by location and activities
Current <b>country ownership</b> of the experience	None	Offered in many countries, climate will influence destination choice
Provide <b>enrichment</b> , fun, challenge or learning	Yes	Perhaps not in an active sense, but rejuvenation should be rewarding
Create <b>distinctive memories</b> to keep and share	Potential	If done as a couple or in a holiday group
Provide <b>cultural</b> or <b>historical immersion</b>	Limited	Unless provided by the specific location
<b>Expert-led</b> or self-guided option	Both	Expert-led experiences within the retreat could increase the luxury level and increase revenue, though overall cost is a perceived barrier
Need to mitigate for the <b>weather</b>	Yes	Both in-destination and travelling to. Indoor experiences will be needed
<b>Established, known</b> and <b>understood</b> experience	Yes	But not necessarily in the context of England
Accessing the <b>target audience</b>	Females, alone and couples	Clarity around the target audience will be important
<b>Bookable product</b>	Yes	Typically booked in advance with the accommodation providers. Positive traveller reviews are important
Local promotion and <b>in-destination bookings</b>	Opportunity	Shorter experiences could be offered locally
Acceptable <b>journey times</b>	Long	As a significant part of the holiday, journey time is not an issue, though clear information on how to get there will still be important
<b>Fixed duration</b> or <b>variable length</b> activity	2+ days	This is assumed to be 2 days plus. There may still be scope to offer variable options on the number of days
<b>Packaging</b> with other activities	Luxury	Expectations of other wellness and pampering experiences