Spa Experience – Relax with several treatments at a specialist venue

Source: Experiences Research 2019

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

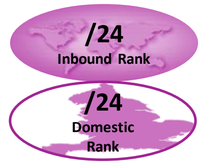
Experience Dashboards

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

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Source: Experiences Research 2019

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SPA EXPERIENCE: SUMMARY

RELAX WITH SEVERAL TREATMENTS AT A SPECIALIST VENUE

5/24 Inbound Rank

5/24 Domestic Rank

EXPERIENCE SCORECARD METRICS*

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

DEMOGRAPHIC SKEWS

Broad appeal across demographics

+ Females
+ Couples
- Not children

Similar High Interest, Established Experiences (included in the research)

- Experience ‘Life behind the scenes’
- Distillery or brewery experience
- Street food tour & tasting
- Vineyard tour & tasting
- Guided nature experience

ENGLAND APPEAL

- A **popular mainstream activity**, seen as a luxury experience
- **Good fit with holiday needs**; providing opportunity for relaxing and feeling pampered, and felt to be a treat
- **Good countryside or city fit** - a way to enjoy the peaceful surroundings of the countryside or have a quick break from the bustle of the city

CHALLENGES

- **Not unique to England** and other countries more likely destinations for inbound travellers
- Many countries offer spa experiences, Thailand is particularly popular, impacting the perception of **England being an expensive destination**
- **Not a driver of destination choice** for inbound travellers, but can be a driver of a short-break destination for domestic travellers

OPPORTUNITIES

- Packaging with other ‘**luxurious**’ experiences will support growth opportunities
- Must deliver on **high expectations** of travellers - being special / luxurious – accommodation providers will be key to delivering this

* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary

Source: Experiences Research 2019

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SPA EXPERIENCE: EXPERIENCE SCORECARD METRICS

RELAX WITH SEVERAL TREATMENTS AT A SPECIALIST VENUE

5/24 Inbound Rank

5/24 Domestic Rank

ENGLAND APPEAL / MATURITY	*% Interest in doing experience in England*	*Ranking out of 24 experiences*	*Share of inbound Volume**
UK *(Domestic)*	70%	5	
All Inbound Markets	*60%*	5	*100%*
Australia	60%	6	5%
China	79%	8	3%
Germany	55%	6	16%
Spain	63%	4	12%
France	55%	6	17%
Italy	63%	4	10%
Netherlands	36%	7	5%
Norway	58%	4	3%
Sweden	53%	4	4%
United States	72%	3	24%

* Based on IPS 2017 FY data

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	25% ↑	5% ↓
Other countries have better experiences	20% ↑	6% ↓

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

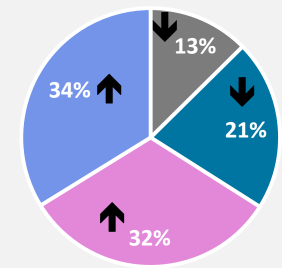
	Inbound	UK
UNIQUE to England	6% ↓	3% ↓
AUTHENTIC to England	8% ↓	5% ↓
Immerse in CULTURE / HISTORY	7% ↓	4% ↓
Create distinctive MEMORIES	20%	21%
CHALLENGE - Something they can't do at home	15%	23%

↓↑ Significantly better than other experiences

↓↑ Significantly worse than other experiences

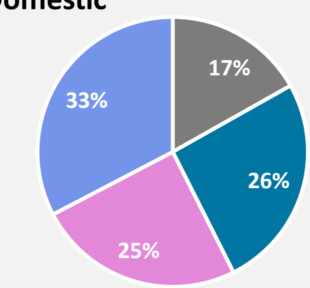
INFLUENCE ON HOLIDAY DECISION

Inbound



Main reason
Significant influence
Small influence
No influence

Domestic



↑ Significantly higher than other experiences

↓ Significantly lower than other experiences

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Source: Experiences Research 2019

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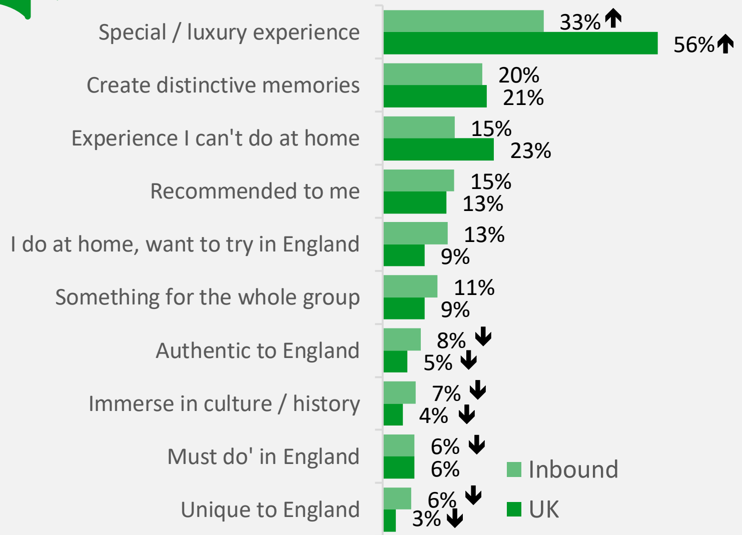
SPA EXPERIENCE: OPTIMISING THE POTENTIAL

RELAX WITH SEVERAL TREATMENTS AT A SPECIALIST VENUE

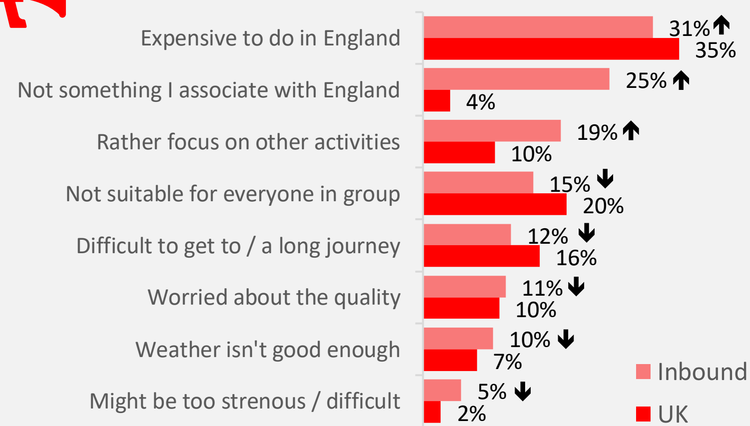
5/24 Inbound Rank

5/24 Domestic Rank

MESSAGES TO AMPLIFY



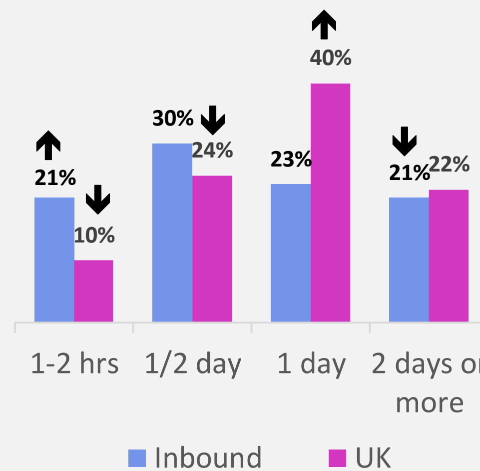
BARRIERS TO ADDRESS



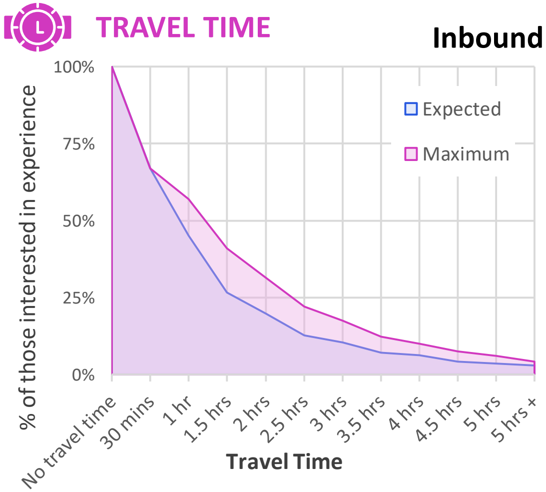
CROSS-OVER INTEREST

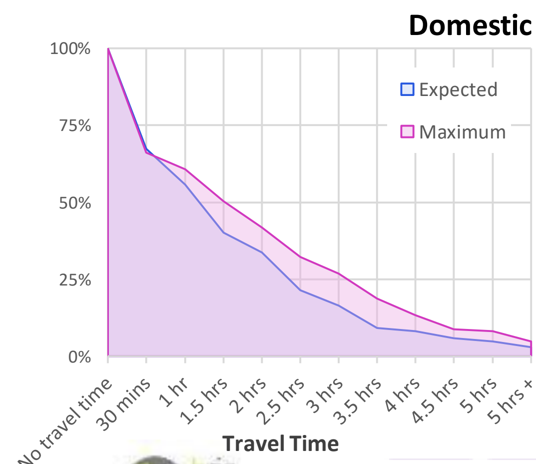
Inbound	UK
Cross-over activities	
Other wellbeing experiences – 46%	Other wellbeing experiences - 47%
Shopping – 26%	Shopping – 29%
Other experiences of interest	
Street Food Tour & Tasting - 82%	Remote wellness retreat – 83%
'Life behind the Scenes' - 78%	Chocolate making class – 79%

EXPERIENCE DURATION



TRAVEL TIME





SPA EXPERIENCE: BOOKING BEHAVIOURS

RELAX WITH SEVERAL TREATEMENTS AT A SPECIALIST VENUE

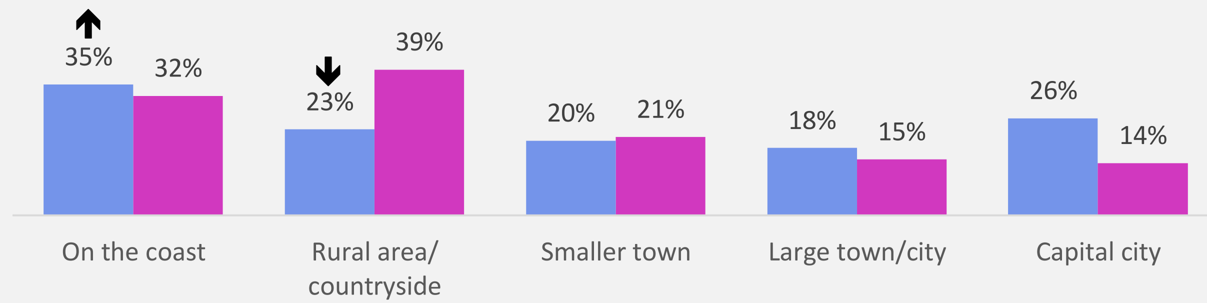
5/24 Inbound Rank

5/24 Domestic Rank

RESEARCH CHANNELS

	Inbound	UK
General internet search	**39%**	**54%**
Accommodation/ hotel website	**30%** ↑	**35%** ↑

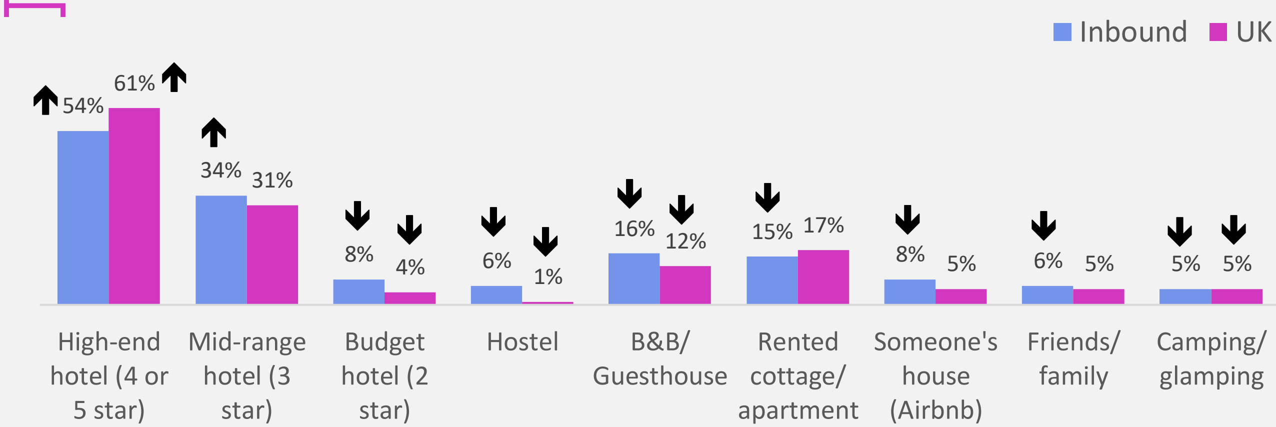
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	**61%** ↑	**77%** ↑
Booked in destination	**27%** ↓	**12%** ↓

ACCOMMODATION TYPE



↑ Significantly higher than other experiences

↓ Significantly worse than other experiences

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Source: Experiences Research 2019

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SPA EXPERIENCE: GO TO MARKET CHECKLIST

RELAX WITH SEVERAL TREATEMENTS AT A SPECIALIST VENUE

5/24 Inbound Rank

5/24 Domestic Rank

Experience Attributes	Experience Performance	Consideration for action
Positioning as **authentic and unique** to England	No	Not seen as unique to England, would need to be combined with other authentic experiences
Current **country ownership** of the experience	None	Asia has some presence, but all countries offer spa's
Provide **enrichment**, fun, challenge or learning	No	Enrichment comes from luxury and pampering rather than wellness
Create **distinctive memories** to keep and share	No	Limited potential to create memories unless the venue is unique
Provide **cultural** or **historical immersion**	Limited	Only the venue can provide this connection
Expert-led or self-guided option	Self-guided	Some potential for personalised programmes?
Need to mitigate for the **weather**	No	Not weather dependent and could be a good 'fall back' alternative for other activities that are more weather dependent (other wellness experiences)
Established, **known** and **understood** experience	Yes	As a luxury, relaxing activity
Accessing the **target audience**	Females and couples	Through accommodation providers and providers of other luxury/ indulgence experiences and products
Bookable product	Core	Mainly booked in advance, though accommodation provider
Local promotion and **in-destination bookings**	Incremental	Local promotion can drive incremental volume, esp if weather mitigation
Acceptable **journey times**	Short	Seen as an activity to be done at accommodation for inbound. Domestic drive-time from home longer as it can be the main part of the holiday
Fixed duration or **variable length** activity	1 day or less	Established expectation around experience duration though alternatives could be offered
Packaging with other activities	Potential	With other luxury experience (note the interest in chocolate making)