

A Tai Chi Experience – e.g. at a famous landmark or outdoors

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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
- + Females
- + BuzzSeekers, Cultural Buffs (Inbound)
- Not a family activity

### Similar Niche Wellness Experiences

(included in the research)

- Pilates experience
- Mindfulness / Meditation class
- Yoga experience
- Homeopathic experience



### ENGLAND APPEAL

- **England is not seen as an obvious choice** for a Tai Chi experience. Building in some uniquely English element will be beneficial, though it needs to be ‘weather-proof’ and most likely linked to a wellness theme
- Tai Chi experiences are currently more likely to be booked before travel, though often using accommodation or price comparison websites



### CHALLENGES

- **Current popular destinations for international travellers are in the Far East** (Japan, China, Thailand). This presents a challenge for England to offer a unique and authentic experience. It also impacts perceptions of the cost of the experience in England
- It is a niche activity and so **accurate identification and targeting** the potential audience is essential



### OPPORTUNITIES

- Tai Chi has relatively low overall appeal but is part of the **niche wellness cluster** that includes other similar activities and therefore provide both a singular and combined opportunity
- The **potential is greater in the domestic market** to drive destination decisions, perhaps around a health/recharge short-break
- The **variation in expected duration** provides an opportunity to offer different options from a few hour taster session to a more intensive multi-day course

# A TAI CHI EXPERIENCE: SCORECARD METRICS

## TAI CHI EXPERIENCE AT A FAMOUS LANDMARK OR OUTDOORS



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	46%	20	
<i>All Inbound Markets</i>	35%	24	100%
<b>Australia</b>	40%	23	6%
<b>China</b>	63%	24	4%
<b>Germany</b>	29%	23	15%
<b>Spain</b>	34%	22	12%
<b>France</b>	30%	24	16%
<b>Italy</b>	28%	24	7%
<b>Netherlands</b>	18%	21	5%
<b>Norway</b>	28%	20	3%
<b>Sweden</b>	23%	24	3%
<b>United States</b>	50%	22	29%

\* Based on IPS 2017 FY data

Indicates where ranking is

- lower (+4 from inbound markets)
- higher (-4 from inbound markets)

### ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	25% ↑	14%
Other countries have better experiences	21% ↑	18%

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



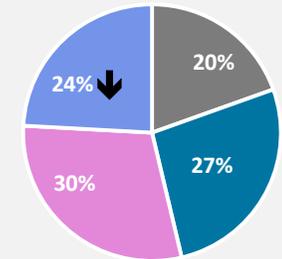
### CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	11%	6%
<b>AUTHENTIC</b> to England	13%	6%
Immerse in <b>CULTURE / HISTORY</b>	14%	12%
Create distinctive <b>MEMORIES</b>	16% ↓	24%
<b>CHALLENGE</b> - Something they can't do at home	16%	23%

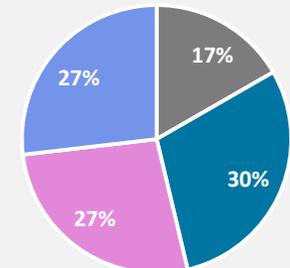
### INFLUENCE ON HOLIDAY DECISION

#### 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



# A TAI CHI EXPERIENCE: OPTIMISING THE POTENTIAL



## TAI CHI EXPERIENCE AT A FAMOUS LANDMARK OR OUTDOORS

### MESSAGES TO AMPLIFY



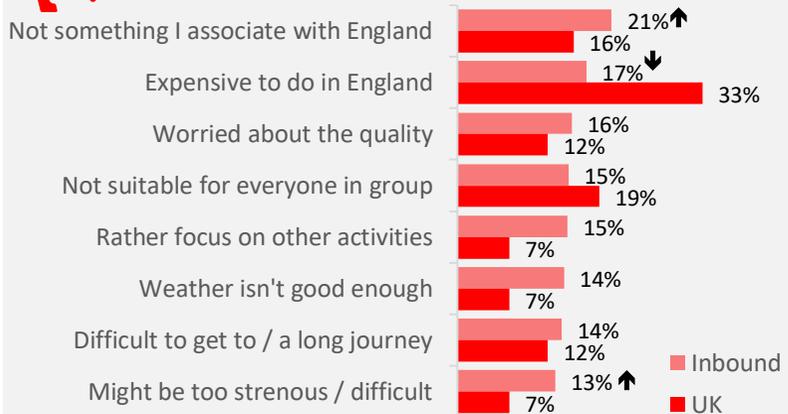
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Other wellness experiences – 23%	Other wellness experiences – 20%
Visiting a park or garden – 19%	Visiting a park or garden – 19%
<b>Other experiences of interest</b>	
Spa experience – 91%	Spa experience – 93%
Remote wellness retreat - 87%	Mindfulness or meditation – 91%

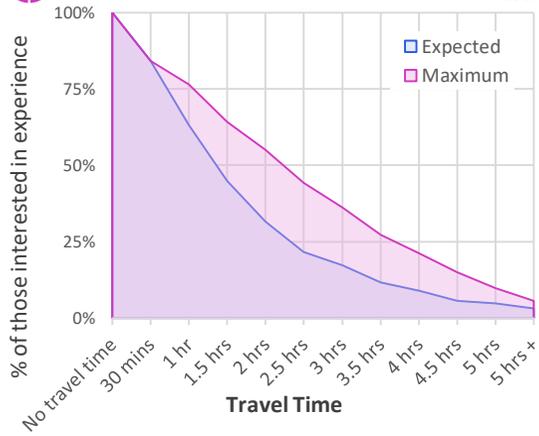
### EXPERIENCE DURATION



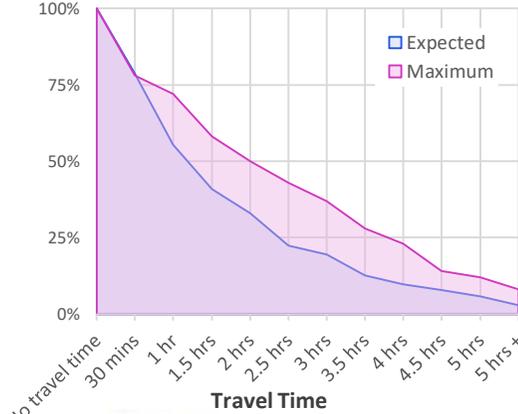
### BARRIERS TO ADDRESS



### TRAVEL TIME



### TRAVEL TIME



# A TAI CHI EXPERIENCE: BOOKING BEHAVIOURS

## TAI CHI EXPERIENCE AT A FAMOUS LANDMARK OR OUTDOORS

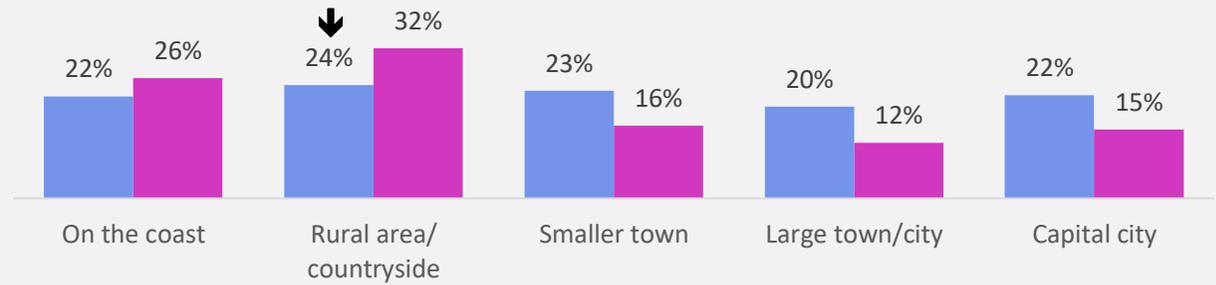


### RESEARCH CHANNELS

	Inbound	UK
General internet search	22% ↓	39%
Accommodation / hotel website	20% ↑	17%
Price comparison website	16% ↑	5%



### LOCATION TYPE

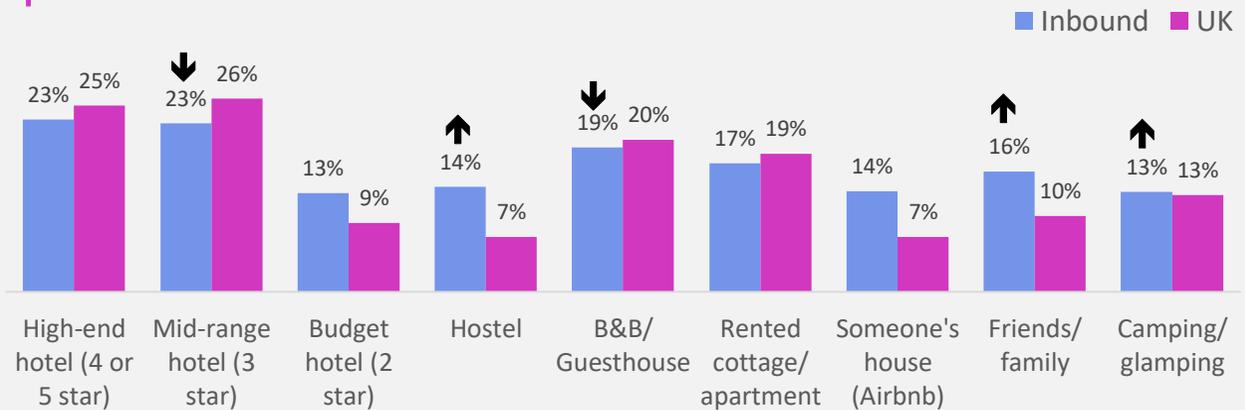


### BOOKING METHOD

	Inbound	UK
Booked before leaving home	63% ↑	66%
Booked in destination	26%	22%



### ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly worse than other experiences



# A TAI CHI EXPERIENCE: GO TO MARKET CHECKLIST

## TAI CHI EXPERIENCE AT A FAMOUS LANDMARK OR OUTDOORS



Focus areas for development of this or similar experiences

Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Low	Connect with quintessentially English experiences/destinations
Current <b>country ownership</b> of the experience	Far East	Need to create a reason to choose England
Provide <b>enrichment</b> , fun, challenge or learning	Yes	Either as a brand new experience or build on existing interest
Create <b>distinctive memories</b> to keep and share	Limited	Connection to other English experiences/destinations will support
Provide <b>cultural</b> or <b>historical immersion</b>	No	Not directly relevant to experience, but could add to interest (as above)
<b>Expert-led</b> or self-guided option	Expert-led	Personalisation may offer additional value (e.g. individual tuition)
Need to mitigate for the <b>weather</b>	Yes	Outdoor experiences need a bad-weather option/alternative
<b>Established, known</b> and <b>understood</b> experience	Partially	Needs strong and clear proposition to drive inbound visitors
Accessing the <b>target audience</b>	Niche	Younger, females with interest in niche wellness activities
<b>Bookable product</b>	Yes	Advance bookings drive volume esp for the domestic market
Local promotion and <b>in-destination bookings</b>	Potential	Through accommodation providers, incremental value
Acceptable <b>journey times</b>	Short	Linked to accommodation provider or short journey time for most
<b>Fixed duration</b> or <b>variable length</b> activity	Both	Opportunity to offer options for experience duration
<b>Packaging</b> with other activities	Potential	Niche audience who may choose one or more similar wellness activities