

Yoga Experience – At a famous landmark,  
outdoors or combined with another sport

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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 | ★★★★☆                     |

# YOGA EXPERIENCE: SUMMARY

AT A FAMOUS LANDMARK, OUTDOORS OR COMBINED WITH ANOTHER SPORT



## 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)

- Tai chi experience
- Mindfulness / Meditation class
- Pilates experience
- Homeopathic experience



## ENGLAND APPEAL

- Whilst Yoga is not seen as an English activity, the **location can provide that connection**
- Typically **appeals alongside other wellness experiences** and other relaxing, rural activities. It also tends to be linked with **luxury** accommodation



## CHALLENGES

- **Not unique to England.** India is one of the leading destinations, which contribute to the perception of it being expensive to do in England
- The proposition tested implies an outdoor location, **mitigating for the weather** will be important, either through an indoor alternative and/or offering alternative wellness experiences



## OPPORTUNITIES

- Link to **unique English locations** adds to the appeal and potential to deliver on authenticity and provide an historical/cultural connection
- Can be offered as part of a **wellness package** including other similar wellness activities
- It has associations with **coastal destinations** and can potentially influence destination choice



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

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# YOGA EXPERIENCE: EXPERIENCE SCORECARD METRICS

AT A FAMOUS LANDMARK, OUTDOORS OR COMBINED WITH ANOTHER SPORT



| ENGLAND APPEAL / MATURITY | % Interest in doing experience in England | Ranking out of 24 experiences | Share of inbound Volume* |
|---------------------------|---|-------------------------------|--------------------------|
| UK (Domestic)             | 45%                                       | 21                            |                          |
| All Inbound Markets       | 38%                                       | 21                            | 100%                     |
| Australia                 | 41%                                       | 22                            | 6%                       |
| China                     | 64%                                       | 23                            | 4%                       |
| Germany                   | 31%                                       | 20                            | 14%                      |
| Spain                     | 39%                                       | 17                            | 12%                      |
| France                    | 33%                                       | 20                            | 17%                      |
| Italy                     | 37%                                       | 19                            | 9%                       |
| Netherlands               | 17%                                       | 22                            | 4%                       |
| Norway                    | 30%                                       | 16                            | 3%                       |
| Sweden                    | 26%                                       | 20                            | 3%                       |
| United States             | 52%                                       | 21                            | 28%                      |

\* 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  | 24% ↑   | 19% |
| Other countries have better experiences | 18%     | 14% |

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

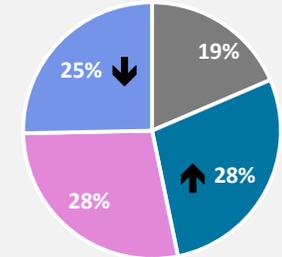
## CORE COMPONENTS OF EXPERIENTIAL

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

|   | Inbound | UK  |
|---|---------|-----|
| UNIQUE to England                           | 14% ↑   | 10% |
| AUTHENTIC to England                        | 11%     | 7%  |
| Immerse in CULTURE / HISTORY                | 11% ↓   | 9%  |
| Create distinctive MEMORIES                 | 18% ↓   | 17% |
| CHALLENGE - Something they can't do at home | 13%     | 10% |

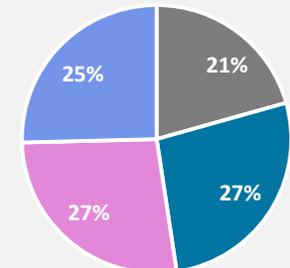
## INFLUENCE ON HOLIDAY DECISION

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

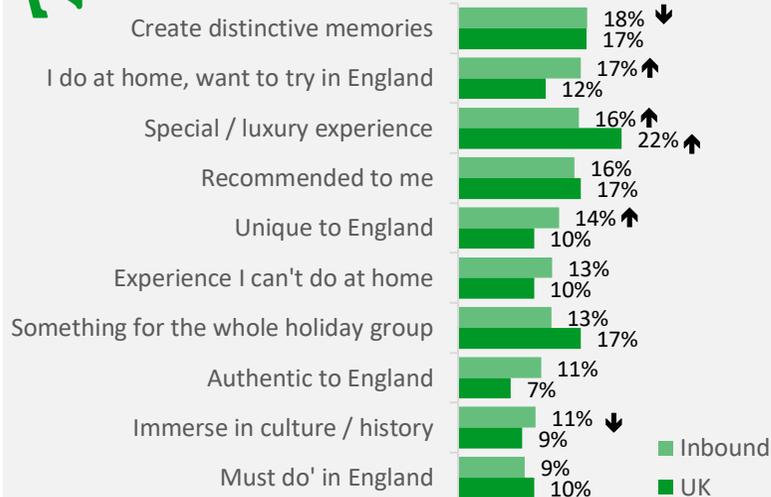


# YOGA EXPERIENCE: OPTIMISING THE POTENTIAL

AT A FAMOUS LANDMARK, OUTDOORS OR COMBINED WITH ANOTHER SPORT



## MESSAGES TO AMPLIFY



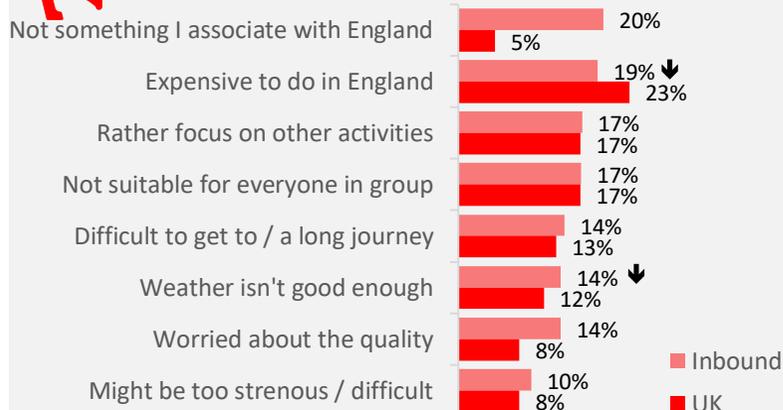
## CROSS-OVER INTEREST

| Inbound                              | UK                                      |
|--------------------------------------|---|
| <b>Cross-over activities</b>         |   |
| Other wellness experiences – 28%     | Other wellness experiences – 30%        |
| Visiting a park or garden – 20%      | Experiencing rural life & scenery – 28% |
| <b>Other experiences of interest</b> |   |
| Spa experience – 91%                 | Spa experience – 94%                    |
| Street food tour & tasting – 87%     | Remote wellness retreat – 92%           |

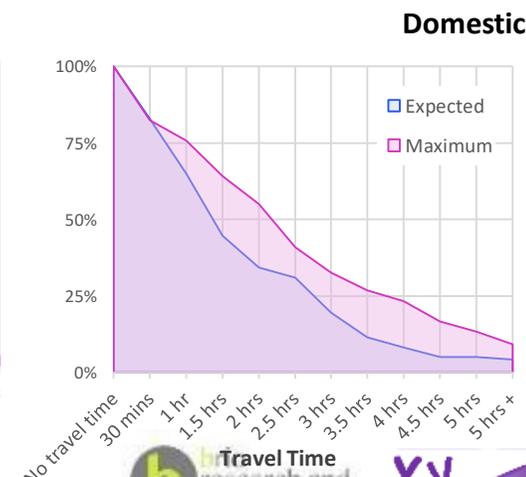
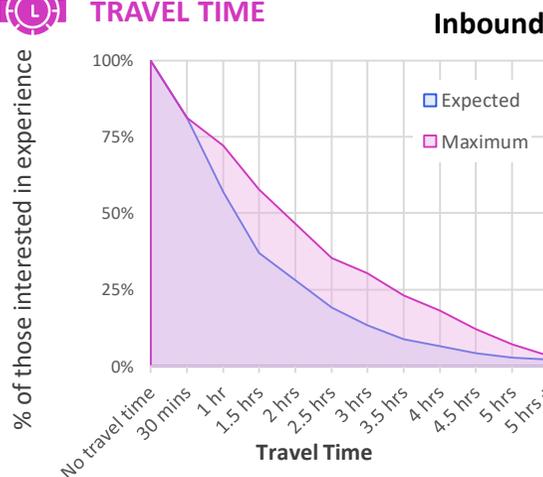
## EXPERIENCE DURATION



## BARRIERS TO ADDRESS



## TRAVEL TIME



# YOGA EXPERIENCE: BOOKING BEHAVIOURS

AT A FAMOUS LANDMARK, OUTDOORS OR COMBINED WITH ANOTHER SPORT



## RESEARCH CHANNELS

|                         | Inbound | UK  |
|-------------------------|---------|-----|
| General internet search | 26% ↓   | 43% |
| Traveller Review Site   | 20%     | 25% |
| Social Media            | 18% ↑   | 19% |

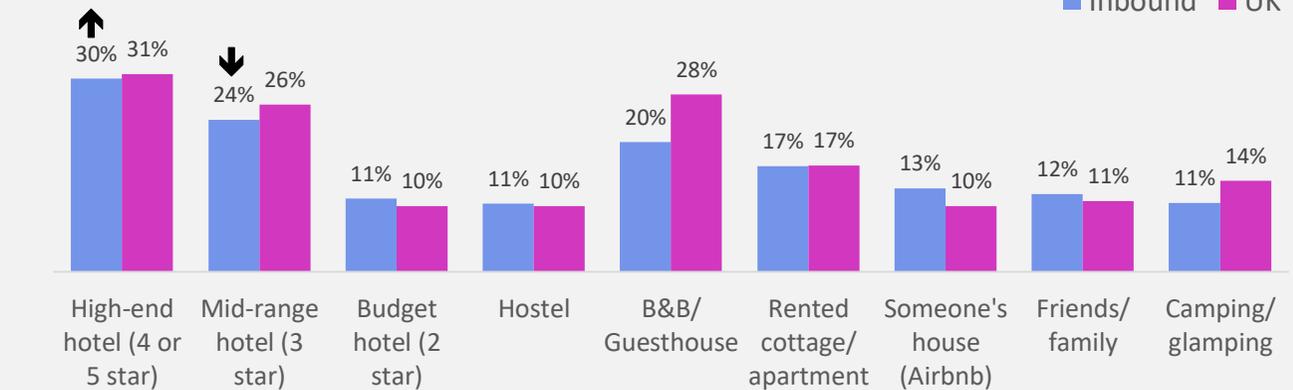
## LOCATION TYPE



## BOOKING METHOD

|                            | Inbound | UK  |
|----------------------------|---------|-----|
| Booked before leaving home | 62%     | 74% |
| Booked in destination      | 25%     | 19% |

## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences  
↓ Significantly lower than other experiences



# YOGA EXPERIENCE: GO TO MARKET CHECKLIST

AT A FAMOUS LANDMARK, OUTDOORS OR COMBINED WITH ANOTHER SPORT



| Experience Attributes                                      | Experience Performance | Consideration for action   |
|--|------------------------|--|
| Positioning as <b>authentic and unique</b> to England      | Potential              | Through choice of locations for the experience   |
| Current <b>country ownership</b> of the experience         | Various                | India performs strongly, so the offer for England needs to differentiate   |
| 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       | Potential              | Through the location and combining with other experiences. As part of a luxury holiday experience                                      |
| Provide <b>cultural</b> or <b>historical immersion</b>     | Potential              | The destination is key to this and could include other activities at that location (skills-based learning, mainstream experiences etc) |
| <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 | Yes                    | Yoga is understood, but needs a uniquely English proposition   |
| Accessing the <b>target audience</b>                       | Niche                  | Younger, females with interest in niche wellness activities  |
| <b>Bookable product</b>                                    | Yes                    | Most volume (domestic & inbound) is booked before travel   |
| Local promotion and <b>in-destination bookings</b>         | Potential              | Through accommodation provider or the experience location  |
| 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   | Short                  | Most expect it to be a short activity – from 1 hour to ½ day.  |
| <b>Packaging</b> with other activities                     | Potential              | Offer alongside other wellness experiences   |



Source: Experiences Research 2019

