

## Homeopathic Experience – Acupuncture, reflexology or osteopathy

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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)
- Done alone

### Similar Niche Wellness Experiences

(included in the research)

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



### ENGLAND APPEAL

- **Niche appeal**, along other similar wellness experiences that appeal to a similar group of people. This may make them interchangeable or part of a multi-experience package
- Beyond wellness experiences, other activities of interest suggest this would be part of a **relaxing holiday**, with a tendency towards the **luxury** end of the market



### CHALLENGES

- **Not unique** to England and England is often not the first choice destination. However it is not currently 'owned' by a single country
- There is a perception that it would be **expensive** to do in England, perhaps influenced by the strength of Asian destinations in the wellness sector
- It is **not** seen as **authentic/unique** to England, **nor** is it something that is relevant to **culture/history**



### OPPORTUNITIES

- Among those who are interested in this experience, it can influence choice of destination and there is a **willingness to travel further** to take part
- Potentially a range of **similar activities** in a **rural or coastal region** would be appealing to those interested in health and wellbeing



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

# HOMEOPATHIC EXPERIENCE: EXPERIENCE SCORECARD METRICS

ACUPUNCTURE, REFLEXOLOGY OR OSTEOPATHY



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	51%	19	
All Inbound Markets	36%	23	100%
Australia	40%	24	6%
China	69%	17	4%
Germany	31%	21	15%
Spain	31%	24	10%
France	33%	21	17%
Italy	31%	23	8%
Netherlands	16%	24	4%
Norway	23%	23	2%
Sweden	27%	18	3%
United States	53%	20	29%

\* Based on IPS 2017 FY data

Indicates where ranking is

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



Source: Experiences Research 2019

## ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	23%	14%
Other countries have better experiences	17%	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

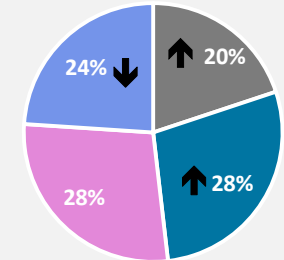
Components experiential providers should emulate or amplify to encourage travellers to participate in England

	Inbound	UK
UNIQUE to England	11%	8%
AUTHENTIC to England	12%	10%
Immerse in CULTURE / HISTORY	13% ↓	13%
Create distinctive MEMORIES	18% ↓	22%
CHALLENGE - Something they can't do at home	15%	24%

- ↓ ↑ Significantly better than other experiences
- ↑ ↓ Significantly worse than other experiences

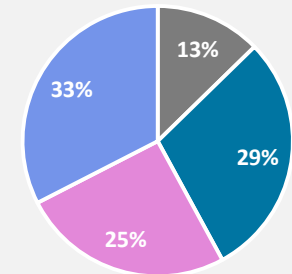
## INFLUENCE ON HOLIDAY DECISION

Inbound



- Main reason
- Significant influence
- Small influence
- No influence

Domestic



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



# HOMEOPATHIC EXPERIENCE: OPTIMISING THE POTENTIAL

**23/24**  
Inbound Rank

**19/24**  
Domestic Rank

## ACUPUNCTURE, REFLEXOLOGY OR OSTEOPATHY

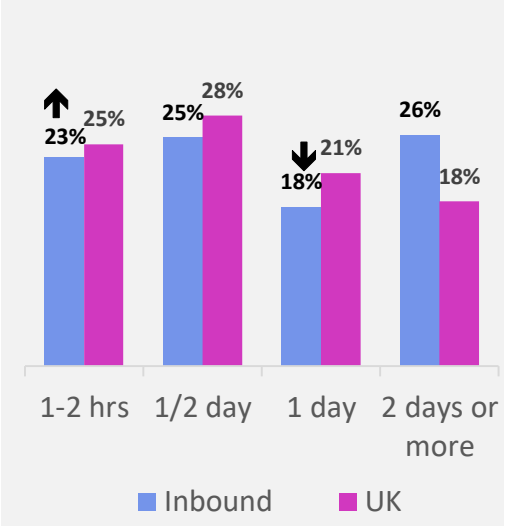
### MESSAGES TO AMPLIFY



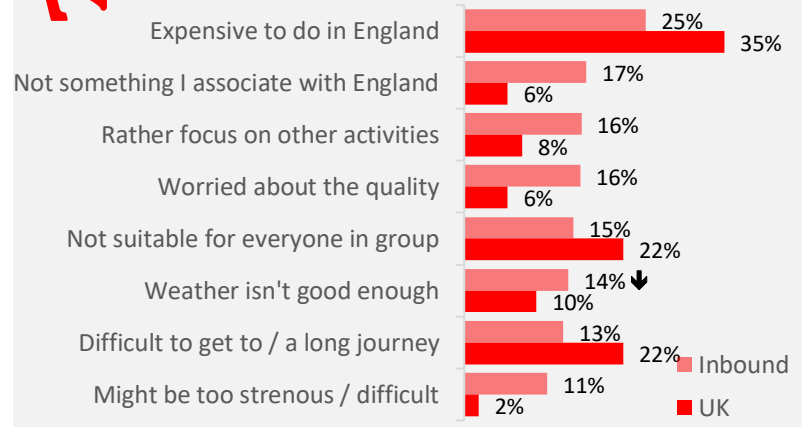
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Other wellness experiences – 25%	Other wellness experiences – 37%
Visiting a park or garden – 18%	Experiencing rural life & scenery – 23%
<b>Other experiences of interest</b>	
Spa experience – 91%	Spa experience – 94%
Street food tour & tasting – 87%	Remote wellness retreat – 90%

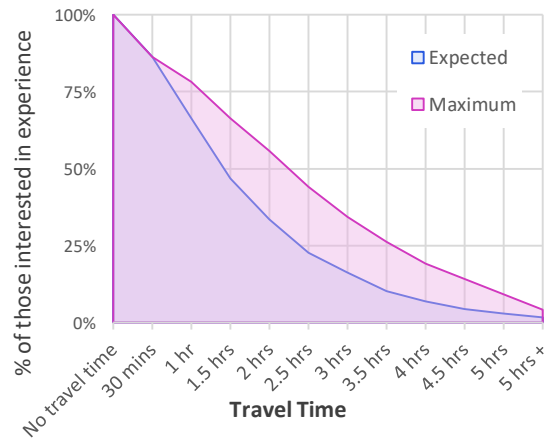
### EXPERIENCE DURATION



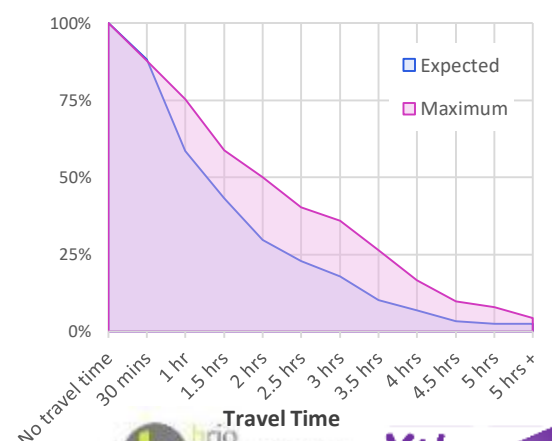
### BARRIERS TO ADDRESS



### TRAVEL TIME



### Domestic



# HOMEOPATHIC EXPERIENCE: BOOKING BEHAVIOURS

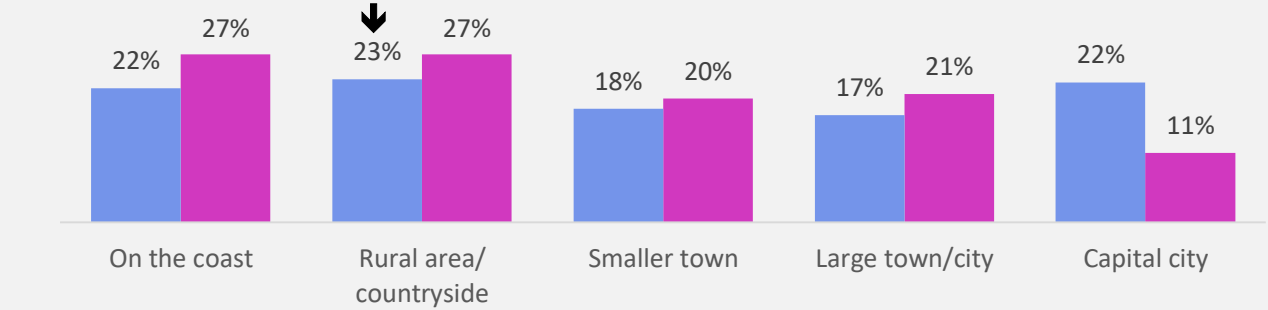
ACUPUNCTURE, REFLEXOLOGY OR OSTEOPATHY



## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>24% ↓</b>	<b>38%</b>
Traveller Review Site	<b>20%</b>	<b>28%</b>
Accommodation / hotel website	<b>19%</b>	<b>23%</b>

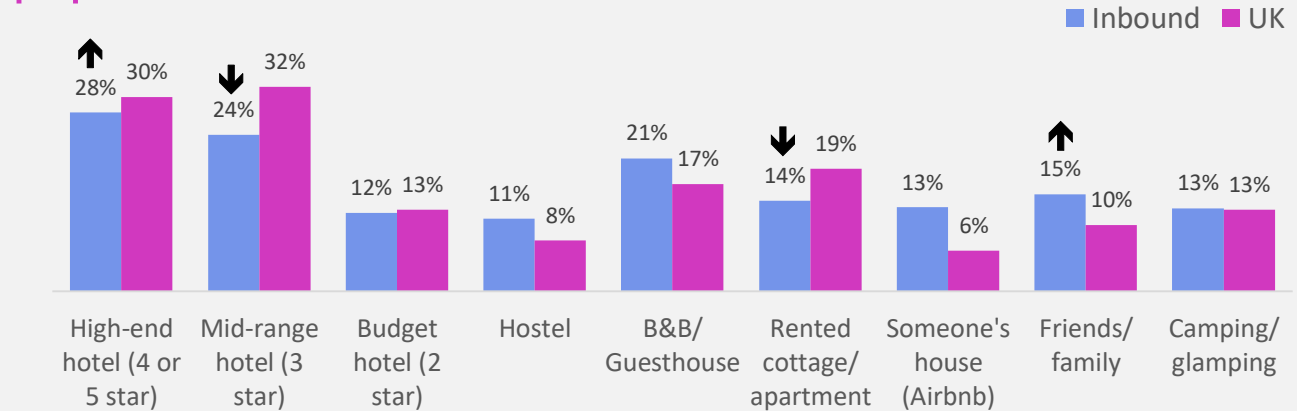
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>63% ↑</b>	<b>68%</b>
Booked in destination	<b>24% ↓</b>	<b>22%</b>

## ACCOMMODATION TYPE



Source: Experiences Research 2019

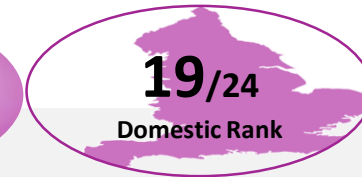
↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# HOMEOPATHIC EXPERIENCE: GO TO MARKET CHECKLIST

ACUPUNCTURE, REFLEXOLOGY OR OSTEOPATHY



Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Low	Not linked to England, potential to build a uniquely English offer
Current <b>country ownership</b> of the experience	None	Not currently a well-established holiday experience, need a compelling reason to do in 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	No	Connection to other English experiences/destinations can 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>	No	Not described as an outdoor activity, so could be a weather substitution activity
<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 inbound travellers
Local promotion and <b>in-destination bookings</b>	Potential	Through accommodation providers to generate incremental volume
Acceptable <b>journey times</b>	Long	For those interested in this type of activity, there is an acceptance of 2hrs + journey time
<b>Fixed duration</b> or <b>variable length</b> activity	Options	From taster sessions, perhaps as part of a wellness package, to a more intensive multi-day experience for those with greater interest
<b>Packaging</b> with other activities	Yes	The niche wellness experiences typically all appeal to the same people. Provide options to choose one or more activities on one location