

A Pilates Experience – at a famous landmark or outdoors



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 | ★★★★☆ |

PILATES EXPERIENCE: SUMMARY

AT A FAMOUS LANDMARK OR OUTDOORS



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)

Similar Niche Wellness Experiences

(included in the research)

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



ENGLAND APPEAL

- Whilst Pilates is not seen as an English activity, the **location** can provide that connection. **Scenic locations** are a good fit with England resonated with destinations outside of London such as the Lake District or Peak District
- Typically appeals alongside other **wellness** experiences and other relaxing, rural activities. It also tends to be linked with **luxury** accommodation



CHALLENGES

- No country owns it, but at least in part because it is not an established holiday activity
- 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
- **Differentiation as a holiday activity** is important as it is seen as a widely available activity that can be done close to home



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
- Clarity around access to the location is important, whether an easy drive or a strenuous walk



* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



PILATES EXPERIENCE: EXPERIENCE SCORECARD METRICS

AT A FAMOUS LANDMARK OR OUTDOORS



| ENGLAND APPEAL / MATURITY | % Interest in doing experience in England | Ranking out of 24 experiences | Share of inbound Volume* |
|---------------------------|---|-------------------------------|--------------------------|
| UK (Domestic) | 43% | 22 | |
| All Inbound Markets | 37% | 22 | 100% |
| Australia | 41% | 21 | 6% |
| China | 67% | 21 | 4% |
| Germany | 29% | 22 | 14% |
| Spain | 38% | 19 | 13% |
| France | 31% | 23 | 17% |
| Italy | 34% | 22 | 9% |
| Netherlands | 17% | 23 | 4% |
| Norway | 28% | 21 | 3% |
| Sweden | 23% | 23 | 3% |
| United States | 49% | 24 | 28% |

* Based on IPS 2017 FY data

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

| | Inbound | UK |
|---|---------|-----|
| More likely to book in another country | 22% | 19% |
| Other countries have better experiences | 16% | 12% |

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



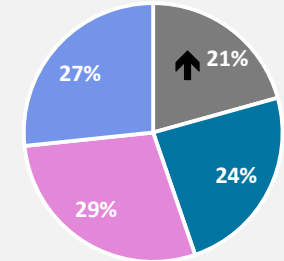
CORE COMPONENTS OF EXPERIENTIAL

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

| | Inbound | UK |
|---|---------|-----|
| UNIQUE to England | 12% | 15% |
| AUTHENTIC to England | 13% | 15% |
| Immerse in CULTURE / HISTORY | 12% ↓ | 11% |
| Create distinctive MEMORIES | 17% ↓ | 13% |
| CHALLENGE - Something they can't do at home | 16% | 13% |

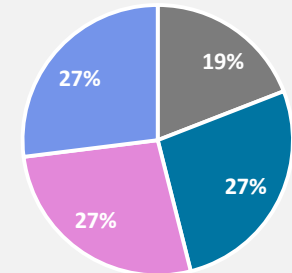
INFLUENCE ON HOLIDAY DECISION

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

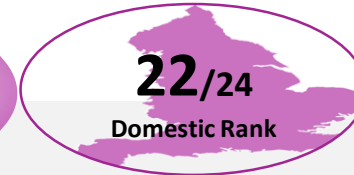
↕ Significantly worse than other experiences



Source: Experiences Research 2019

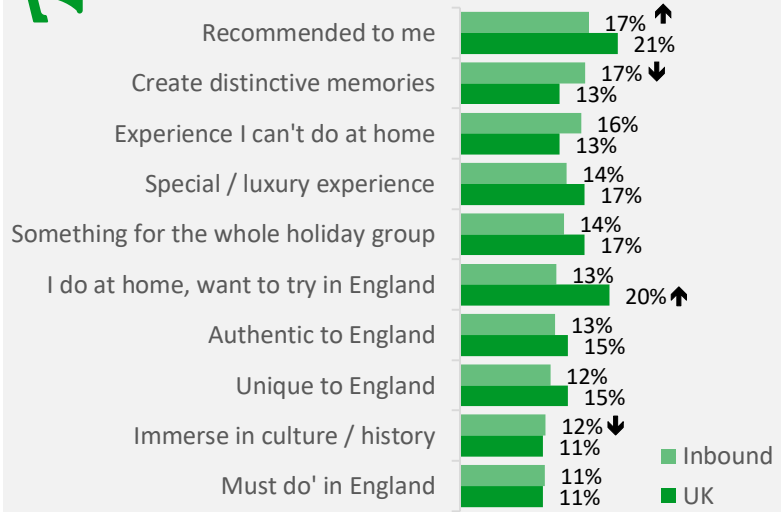


PILATES EXPERIENCE: OPTIMISING THE POTENTIAL



AT A FAMOUS LANDMARK OR OUTDOORS

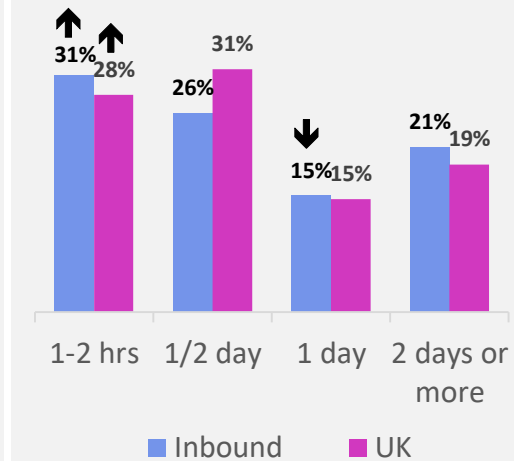
MESSAGES TO AMPLIFY



CROSS-OVER INTEREST

| Inbound | UK |
|--------------------------------------|---------------------------------|
| Cross-over activities | |
| Other wellness experience – 24% | Other wellness experience – 25% |
| Shopping -17% | Visiting a park or garden – 24% |
| Other experiences of interest | |
| Spa Experience – 90% | Spa experience – 94% |
| Street food tour & tasting – 87% | Remote wellness retreat – 92% |

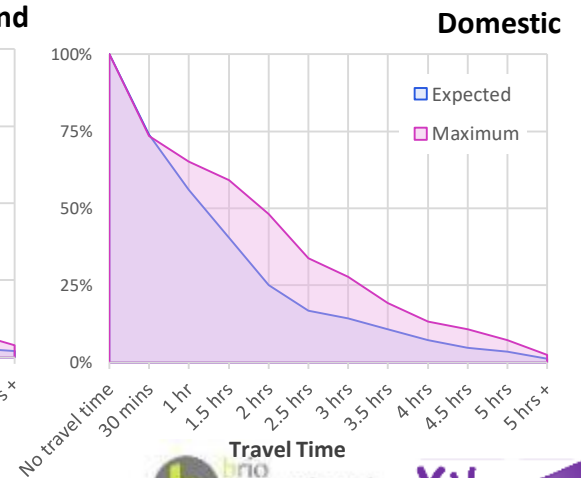
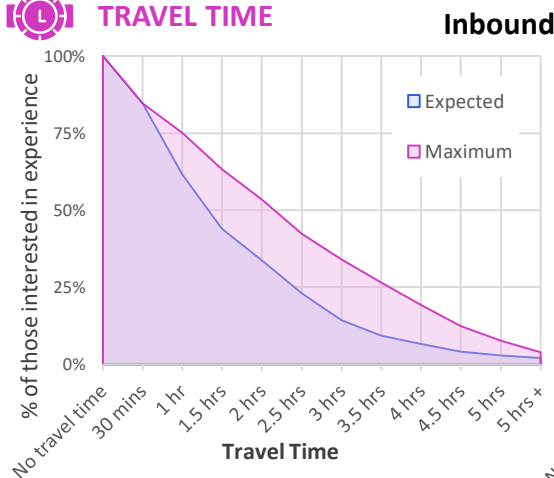
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



PILATES EXPERIENCE: BOOKING BEHAVIOURS

AT A FAMOUS LANDMARK OR OUTDOORS

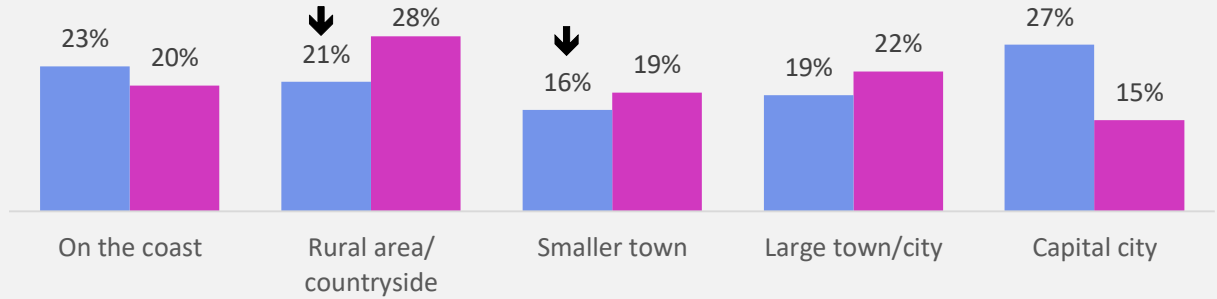


RESEARCH CHANNELS

| | Inbound | UK |
|-------------------------|---------|-----|
| General internet search | 21% ↓ | 33% |
| Traveller review site | 20% | 27% |



LOCATION TYPE

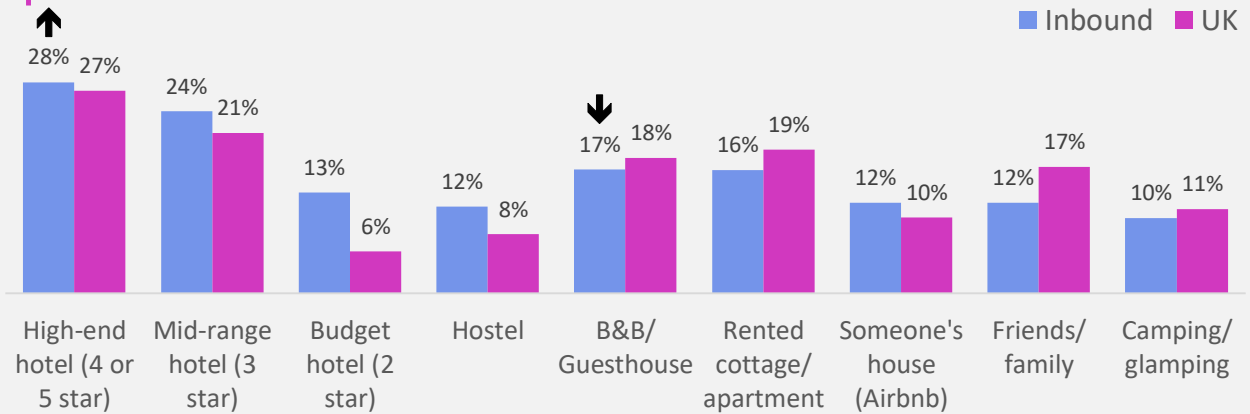


BOOKING METHOD

| | Inbound | UK |
|----------------------------|---------|-----|
| Booked before leaving home | 62% | 71% |
| Booked in destination | 27% | 19% |



ACCOMMODATION TYPE



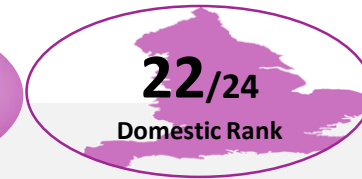
Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



PILATES EXPERIENCE: GO TO MARKET CHECKLIST



AT A FAMOUS LANDMARK OR OUTDOORS

| Experience Attributes | Experience Performance | Consideration for action |
|--|------------------------|--|
| Positioning as authentic and unique to England | Potential | If offered in a uniquely English location with striking landscape |
| Current country ownership of the experience | None | Currently a widely available wellness activity not associated with holidays |
| Provide enrichment , fun, challenge or learning | Limited | For many it is not a new activity, so would need to be carefully positioned for beginners or experienced participants |
| Create distinctive memories to keep and share | Potential | The location can provide the visual memories and add to the luxury perception of the experience |
| Provide cultural or historical immersion | Limited | Outdoor location can provide some linkage, but may not be vital for this experience |
| Expert-led or self-guided option | Expert-led | Personalisation may offer additional value (e.g. individual tuition) |
| Need to mitigate for the weather | Yes | As an outdoor activity alternatives need to be considered , either an indoor option or alternative wellness activity |
| Established, known and understood experience | Yes | Well-understood, but not currently seen as a holiday activity |
| Accessing the target audience | Niche | Younger, females with interest in niche wellness activities |
| Bookable product | Yes | Advance bookings drive both inbound and domestic volume |
| Local promotion and in-destination bookings | Yes | Accommodation providers and local advocacy/promotion programmes |
| Acceptable journey times | Mixed | Experience as part of accommodation offer or short journey time. Those with specific interest would travel for longer. |
| Fixed duration or variable length activity | Short | Most expect it to be a 1-2 hour activity |
| Packaging with other activities | Yes | Niche audience who may choose one or more similar wellness activities in a rural location |