

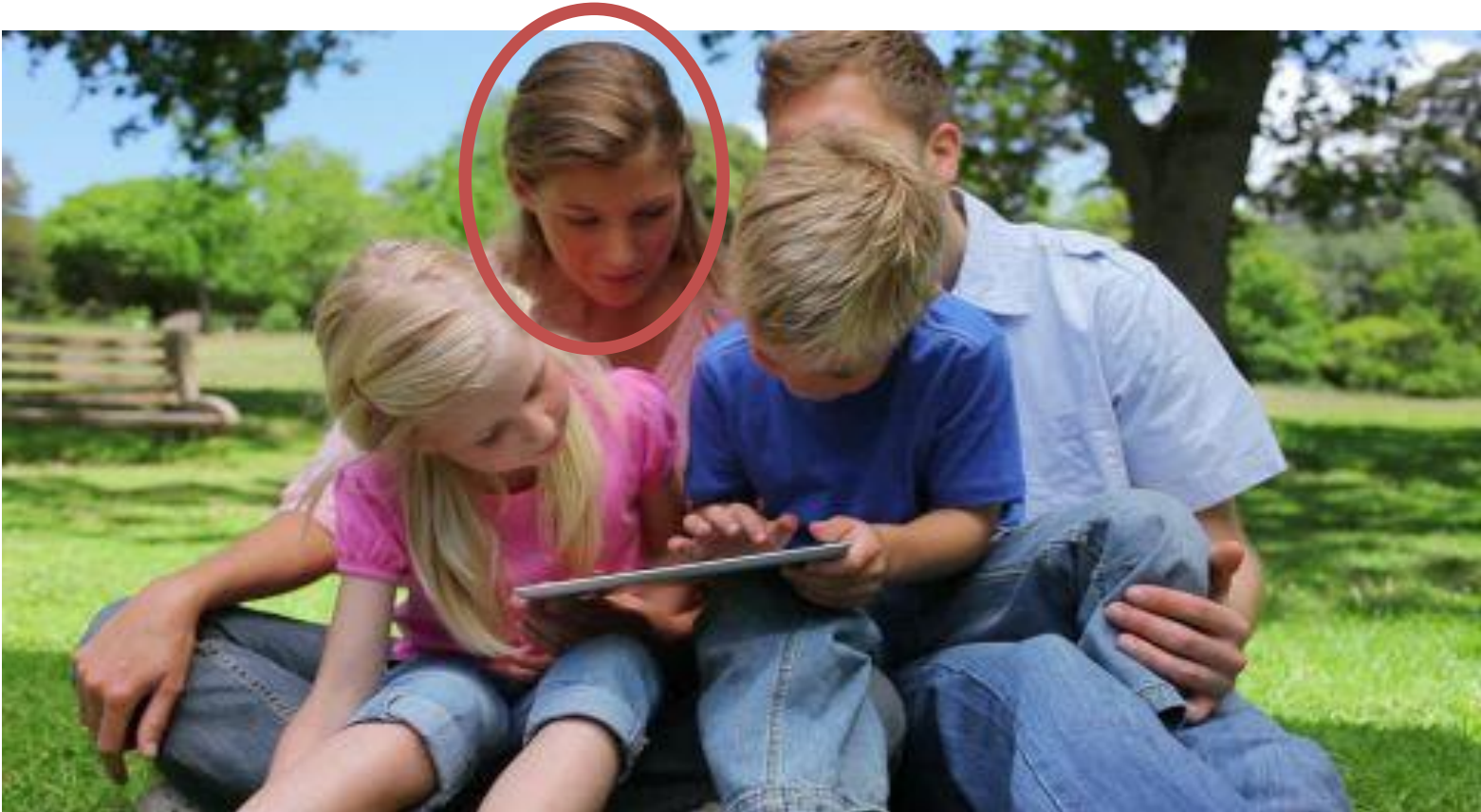


What Mum Wants ...
and other research

2nd December, 2015

Family Travel Market in the UK

- 25% of all trips by domestic tourists **are** worth £15 billion
- generates over a third of holiday receipts within the wider holiday market .

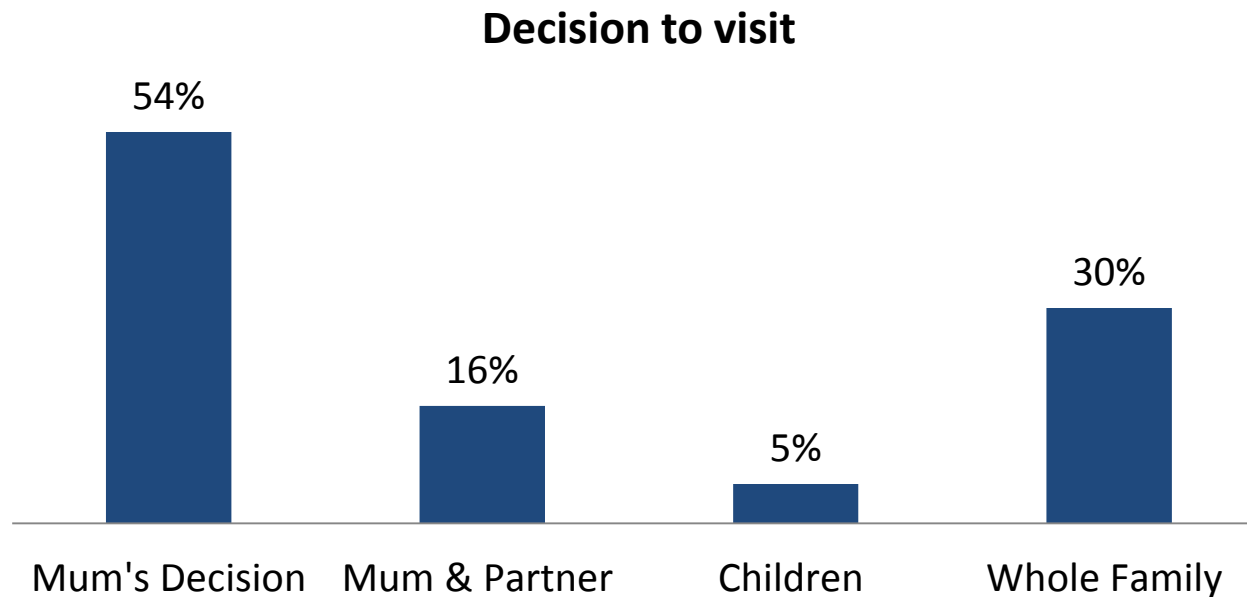


Some findings from our ...

..... School Gate Research

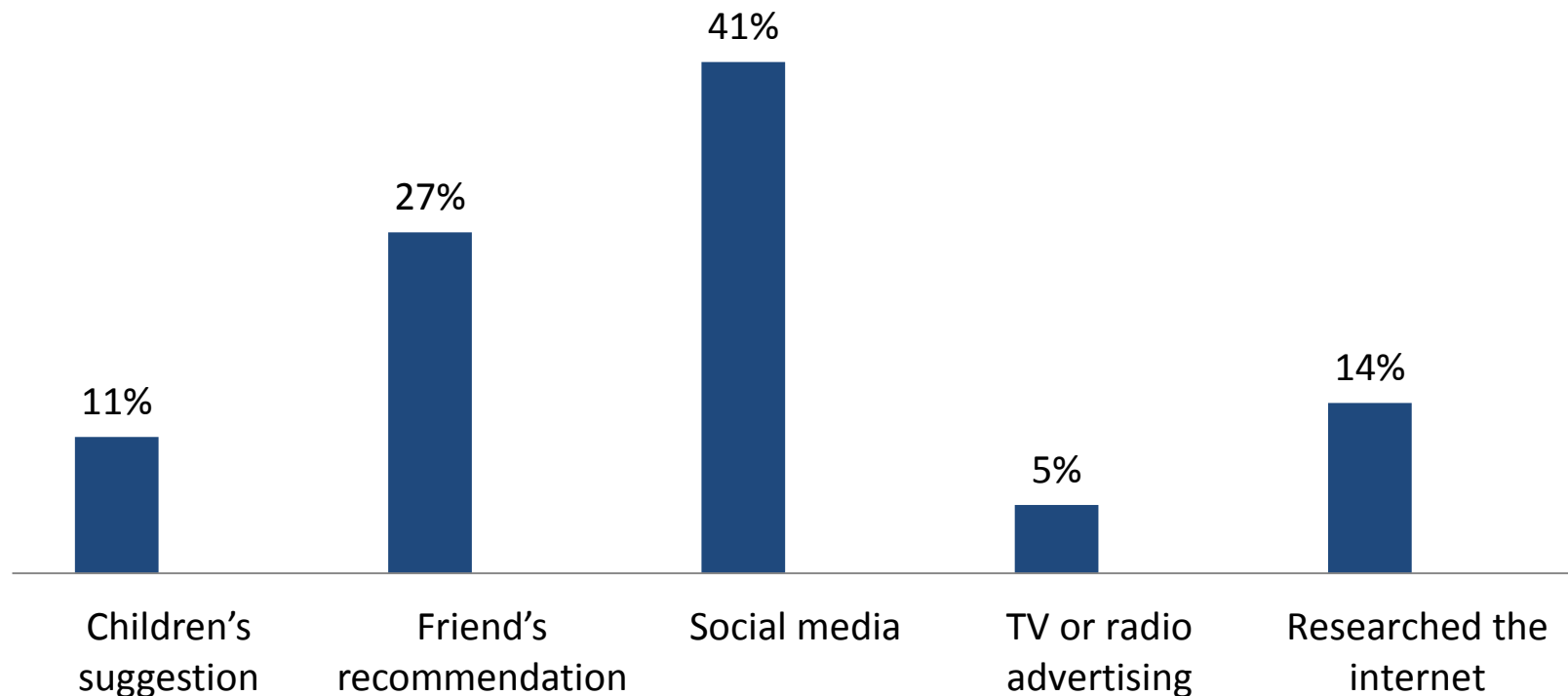
How families plan their outings?

54% of Mums surveyed decide and organise the outings



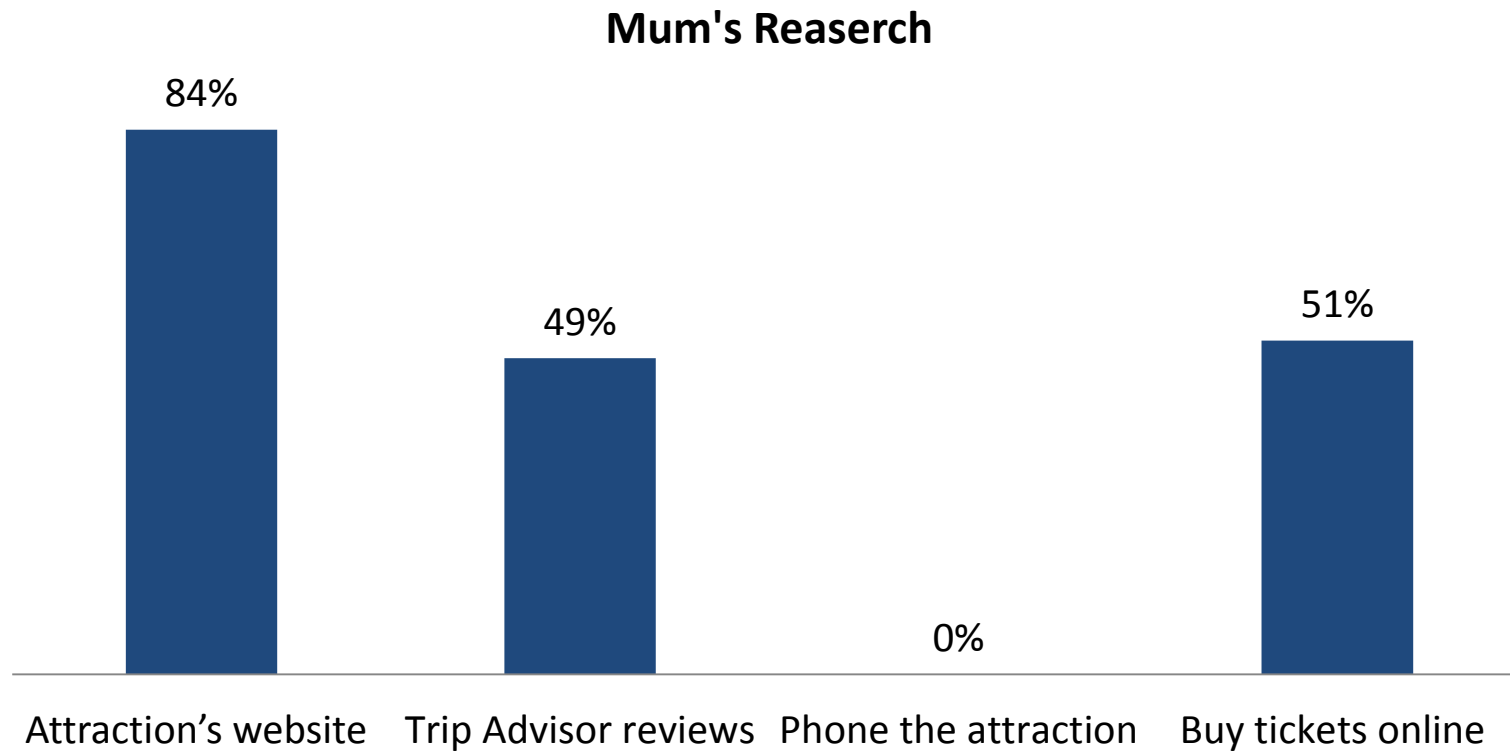
How families plan their outings?

41% of Mums find out about attractions on Social Media



What research do Mums do before leaving home?

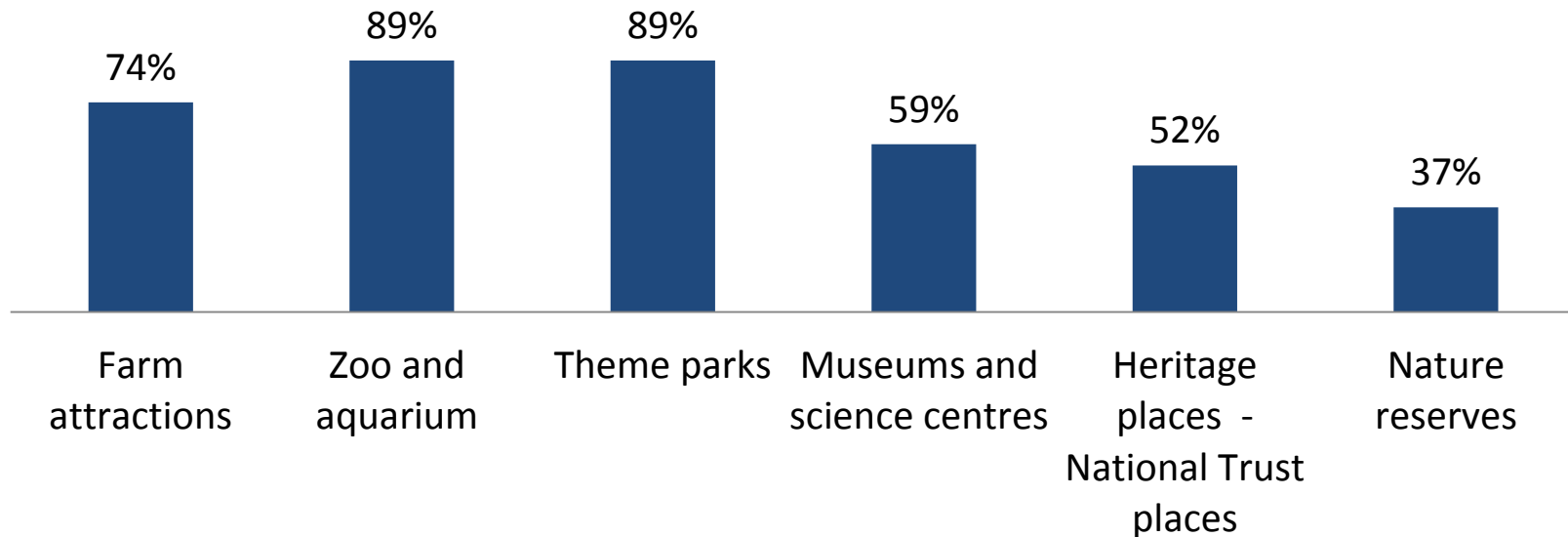
84 % of Mums check the attraction website and 51% buy tickets online



What attractions are Mums most likely to visit ?

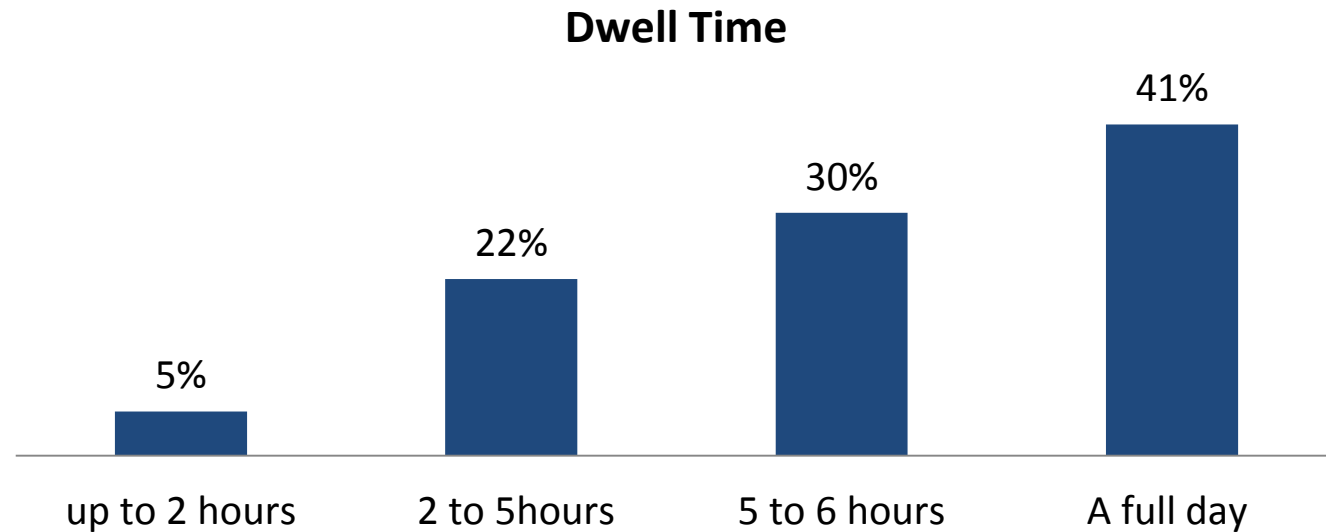
Zoos, Aquariums and Theme parks are top of Mum's List

What Attractions are Mums visiting



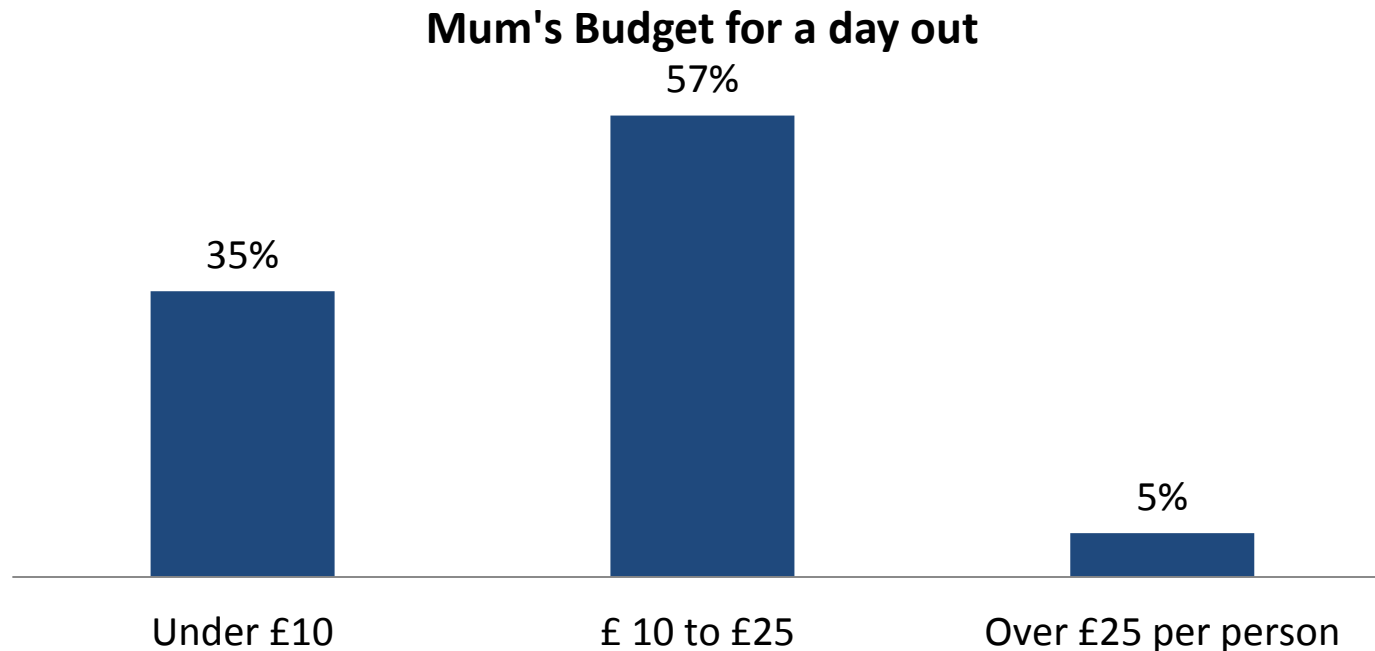
How long would Mums like the visit to be?

Mums would like the visit to be a full day



Mum's Budget for a day out

57% of Mums admit they would spend between £10 to £25 per person on a day out (excluding tickets and travel)



What Mum expects from a day out

Top ten priorities

1. Spending quality time together
2. Opportunity for the children to enjoy themselves and have fun
3. To learn something new
4. Something for everybody in the family
5. Discounted tickets
6. Seeing animals and getting close to them
7. New rides, exhibits and activities
8. Special events
9. Somewhere we have never been before
10. Rides and high adrenaline activities



Vision XS

Psychographic Research

...Some key facts

The building blocks of Visitor Experience



Vision XS works from the basic premise that all human experiences can be separated into distinct psychological elements.

For 17 years we have researched 6 groups of elements....

Action and Activity

Motion

The Surroundings

Skills and Senses

Learning

Emotion or Reaction

The Visitor Experience Model works with 74 elements – your building blocks

Themed areas

Touching something rare

Learning through playing

Visual effects

Laughter/ Humour

Artistic activities

Extreme motion

Gardens

In water or getting wet

Rides/machines you control

Visual entertainment

Adrenalin rush / buzz

Relaxing

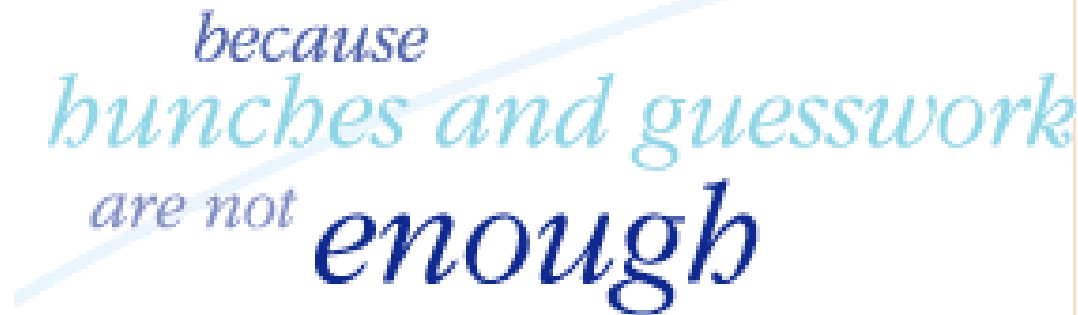
Sound effects

Learning by being creative

VisionXS: Research insight

Vision XS asked 550 women, aged 25 to 45 to rate their preferences for 74 psychological elements that we have identified as the key building blocks of the visitor experience.

The survey was repeated 3 times: in 2006, 2012 and 2015. Key findings are on the next slides.



*because
bunches and guesswork
are not
enough*

What kids want when visiting tourist attractions differs by age group:

- Ages 1-5: **Sense and Sensibility** – storytelling, fantasy and wonder
- Ages 4-7: **DIY Years** – interactive, education and variety
- Ages 8-11: **Identity Quest** – belonging, variety, education and interactive
- Ages 12-16: **The Thrill Years** – thrills, authenticity and history
- Young Adult: **Connections** – experiences, adventure, authenticity, making a difference

VisionXS key findings: Mums want:

2006	
1	Viewing Animals
2	Laughter
3	Contact with animals
4	Relaxing
5	Viewing something rare
6	Visual entertainment
7	Outdoors
8	Using your hands
9	Visual effects
10	Learning by being creative

2012	
1	Laughter/Humour
2	Relaxing
3	Getting-away-from-it-all / escape
4	Content/happy/comforted
5	Inspiring
6	Contact with Animals
7	Natural Landscape
8	Panoramic Views
9	Viewing Animals
10	Viewing something rare

2015	
1	Laughter/Humour
2	Viewing Animals
3	Contact with Animals
4	Relaxing
5	Viewing something rare
6	Tasting
7	Inspiring
8	Curiosity / Interest
9	Natural Landscape
10	Practical Learning

VisionXS key findings: Mums don't want ...

2015

- 1 Being part of a show
- 2 Going round and round
- 3 Interacting with other visitors
- 4 Unexpected movements
- 5 Scary
- 6 Vending
- 7 Darkness
- 8 In water or get wet
- 9 Slow motion
- 10 Spiritually connected

2015

- 11 Risk Taking
- 12 Simulated motion
- 13 Competition
- 14 Dazzling light
- 15 Cold / Ice effect
- 16 Acceleration Motion/Going faster and faster
- 17 Fast Motion
- 18 Doing Art
- 19 Spending money
- 20 Weird

VisionXS Key findings

Age Group	Research Year	Active Time	Activities per Hour	Queuing for normal activity	Queuing for favourite activity
Female 25 to 45	2006	43%	3.4	16 min	23 min
Female 24 to 45	2012	66%	3.6	19.5 min	27 min
Female 24 to 45	2015	61%	4	18.5 min	25 min

VisionXS: 2015 Mums' fact file

- 25 to 45 year old Mums prefer to have an Authentic Experience incorporating FUN, RELAXATION, LEARNING, ANIMALS and BEAUTIFUL LANDSCAPE
- Other Key Elements for a memorable day out are: TECHNOLOGY USE, INTERACTIVITY, QUALITY DINING and SHOPPING (68% of Mums like shopping at attractions)
- The average meal time is 36 minute and Mums expect to be active around 60% of the time
- In terms of type of catering service 35% of Mums would prefer a table service restaurant and 38% would like self-service
- As food choices, 57% of Mums would prefer healthy meals and 43% would not mind buying fast food when visiting attractions.