

## Chocolate Making Class – Learn from expert chocolatiers

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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	★★★★☆

# CHOCOLATE MAKING CLASS: SUMMARY

LEARN FROM EXPERT CHOCOLATIERS



## EXPERIENCE SCORECARD METRICS\*

Star rating – low to high

	England Appeal	★ ★ ☆ ☆ ☆
	Experience Maturity	★ ★ ★ ☆ ☆
	Authentic / Unique	★ ★ ☆ ☆ ☆
	History / Culture	★ ☆ ☆ ☆ ☆
	Influence on holiday decision	★ ☆ ☆ ☆ ☆



### DEMOGRAPHIC SKEWS

Slightly older domestic audience and younger inbound audience

- + Females
- + Adventurers (Inbound)
- + family activity

### Similar Food & Drink Learning Experiences

(included in the research)

- Cookery class
- Cheese making class
- Baking school



## ENGLAND APPEAL

- Niche appeal as part of a **luxury, indulgent break** and currently assumed to be a **city** activity.
- Mixed response for England appeal which varied across markets. For some top of mind was Cadbury's chocolate factory which was well-known for good chocolate.



## CHALLENGES

- **France** currently the 'go to' destination for chocolate making
- Even among those who would consider this experience in England, other countries are more likely to be chosen
- Despite quite high level of interest, most would **not actively seek out** this activity on holiday and it is therefore not a driver of destination choice and has limited willingness to travel to



## OPPORTUNITIES

- Appeal is particularly high in the domestic market, reflecting the greater knowledge of chocolate makers in England
- Could add extra elements e.g. **educational** aspect such as learning about the history of chocolate in England. Alternatively pairing this experience with **wine/dessert wine tasting** was suggested.



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

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# CHOCOLATE MAKING CLASS: EXPERIENCE SCORECARD METRICS



## LEARN FROM EXPERT CHOCOLATIERS

ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	69%	6	
<i>All Inbound Markets</i>	51%	10	100%
<b>Australia</b>	56%	7	6%
<b>China</b>	76%	11	3%
<b>Germany</b>	43%	10	15%
<b>Spain</b>	51%	10	12%
<b>France</b>	43%	11	16%
<b>Italy</b>	48%	11	9%
<b>Netherlands</b>	34%	9	6%
<b>Norway</b>	41%	8	3%
<b>Sweden</b>	40%	5	4%
<b>United States</b>	66%	8	26%

\* Based on IPS 2017 FY data

Indicates where ranking is

- lower or higher (+/- 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	<b>23% ↑</b>	9%
Other countries have better experiences	<b>17%</b>	7%

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



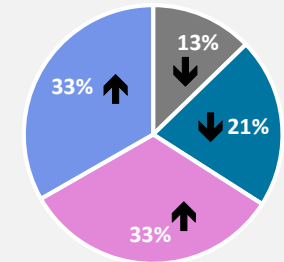
### CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	<b>10%</b>	6%
<b>AUTHENTIC</b> to England	<b>11%</b>	11%
Immerse in <b>CULTURE / HISTORY</b>	<b>12% ↓</b>	8%
Create distinctive <b>MEMORIES</b>	<b>22%</b>	21%
<b>CHALLENGE</b> - Something they can't do at home	<b>16%</b>	28%

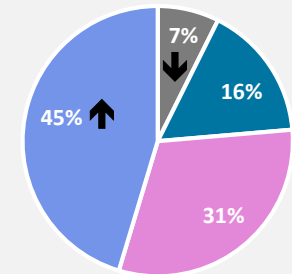
### INFLUENCE ON HOLIDAY DECISION

#### Inbound



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

#### Domestic



↑ Significantly higher than other experiences

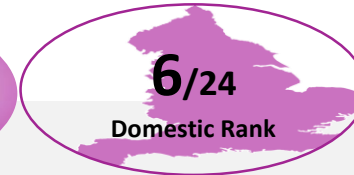
↓ Significantly lower than other experiences

↓ ↑ Significantly better than other experiences

↓ ↑ Significantly worse than other experiences



# CHOCOLATE MAKING CLASS: OPTIMISING THE POTENTIAL



## LEARN FROM EXPERT CHOCOLATIERS

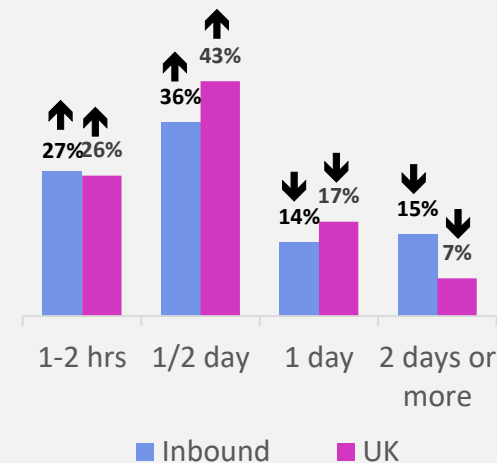
### MESSAGES TO AMPLIFY



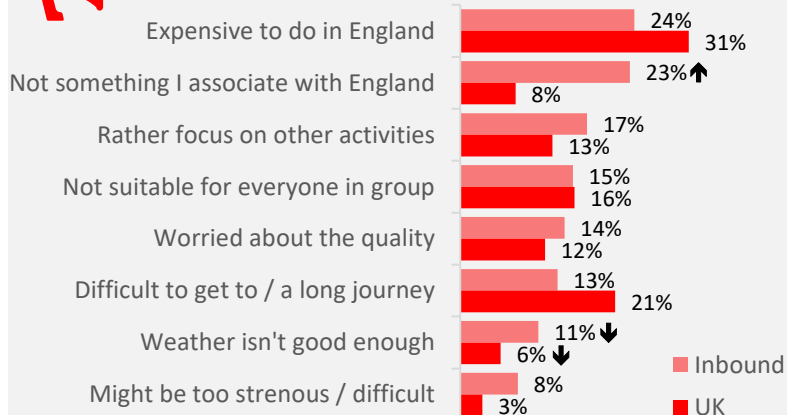
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Shopping – 26%	Shopping – 33%
Experiencing City Life- 24%	Other learning experience – 21%
<b>Other experiences of interest</b>	
Street food tour & tasting – 86%	Distillery or brewery experience – 82%
'Life behind the scenes' – 81%	Vineyard tour & tasting – 81%

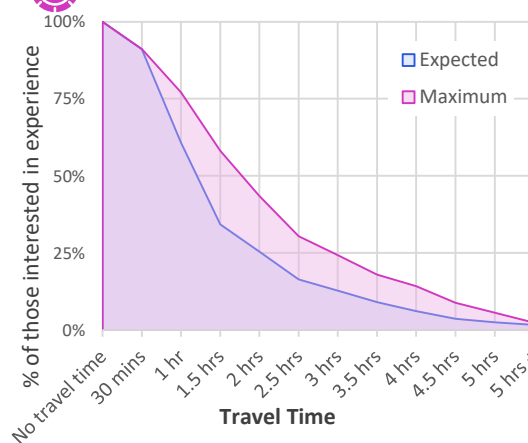
### EXPERIENCE DURATION



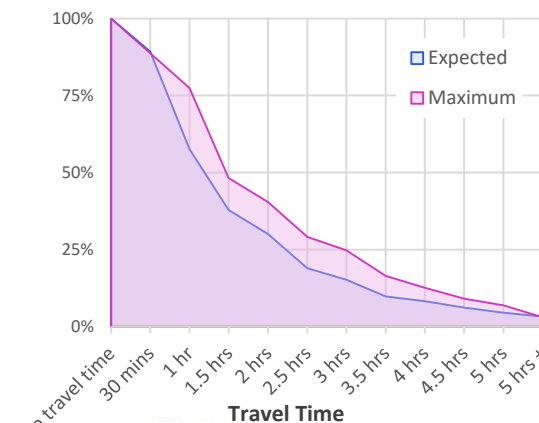
### BARRIERS TO ADDRESS



### TRAVEL TIME



### Domestic



# CHOCOLATE MAKING CLASS: BOOKING BEHAVIOURS

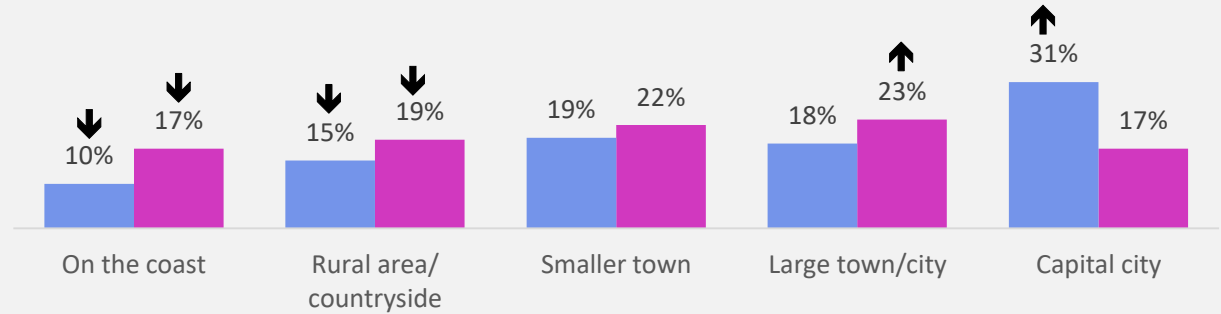
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## RESEARCH CHANNELS

	Inbound	UK
General internet search	<b>31%</b>	<b>48%</b>
Traveller Review Site	<b>25%</b>	<b>26%</b>
Social Media	<b>16% ↑</b>	<b>11%</b>

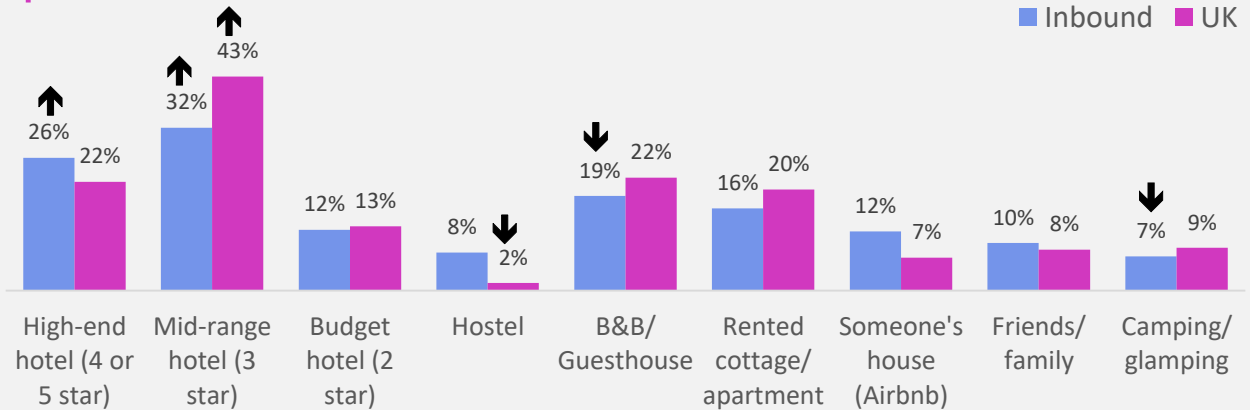
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	<b>53%</b>	<b>60%</b>
Booked in destination	<b>32%</b>	<b>22%</b>

## ACCOMMODATION TYPE



Source: Experiences Research 2019

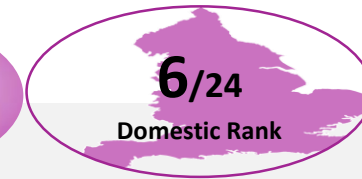
↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# CHOCOLATE MAKING CLASS: GO TO MARKET CHECKLIST

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Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Domestic only	Inbound travellers do not know England for chocolate making
Current <b>country ownership</b> of the experience	France & Switzerland	Strong promotion of England's leading brands such as Cadburys, Thorntons, Hotel Chocolat as well as artisan chocolatiers
Provide <b>enrichment</b> , fun, challenge or learning	Potential	Hands-on activity aimed at adults or children
Create <b>distinctive memories</b> to keep and share	Potential	Holiday group shared indulgent activity
Provide <b>cultural or historical immersion</b>	Limited	Strong communication of history/heritage to reinforce authenticity
<b>Expert-led</b> or self-guided option	Expert-led	Expertise in chocolate-making process, the history of cocoa and the people, the role of a chocolatier, cookery/creative skills with chocolate
Need to mitigate for the <b>weather</b>	No	Indoor activity, could be an alternative experience for a weather-dependent one
<b>Established, known</b> and <b>understood</b> experience	Generally	Individual experiences would need clear communication
Accessing the <b>target audience</b>	Family	Accurate targeting of suitable audiences – adults or children, domestic focus?
<b>Bookable product</b>	Potential	As part of a food learning package?
Local promotion and <b>in-destination bookings</b>	Important	In-destination bookings fuelled by reviews and recommendations
Acceptable <b>journey times</b>	Short	Limited willingness to travel over an hour to this experience
<b>Fixed duration</b> or <b>variable length</b> activity	Short	Half-day maximum for most people
<b>Packaging</b> with other activities	Yes	Other luxury activities - spa, personal shopper etc. or other food experiences – learning activities, vineyard tours etc.