

Vineyard Tour & Tasting – Discover the wine making process and taste it to



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	★★★★☆

VINEYARD TOUR & TASTING: SUMMARY

DISCOVER THE WINE MAKING PROCESS AND TASTE IT TO



EXPERIENCE SCORECARD METRICS*

Star rating – low to high

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

DEMOGRAPHIC SKEWS

- + Over 55s
- + Females
- + Adventurers, Explorers (Inbound)
- + Couples

Similar High Interest, Established Experiences (included in the research)

- Experience 'Life behind the scenes'
- Distillery or brewery experience
- Street food tour & tasting
- Spa experience
- Guided nature experience



ENGLAND APPEAL

- A **popular** experience, seen as **relaxing** and a chance to admire the **beautiful landscape** and walk around the vineyards
- It fits well with other **rural activities** and **food & drink experiences**



CHALLENGES

- **England is not widely known for wine making.** France currently owns this experience along with other recognised wine producers – Italy , Spain etc.
- Even among those who would do in England, **other countries are seen as more likely destinations** for this experience
- It isn't generally seen as a driver of destination choice and so is likely to be an **add-on activity** rather than the 'hero' experience of a holiday



OPPORTUNITIES

- Mixed views on England appeal. Some were keen to try experience out of curiosity, though some did not associate England with wine.
- As a rural experience it has potential to support development of regional England experiences



* See next slide for metrics used to define scorecard metrics

Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



VINEYARD TOUR & TASTING: EXPERIENCE SCORECARD METRICS



DISCOVER THE WINE MAKING PROCESS AND TASTE IT TO

ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	74%	2	
<i>All Inbound Markets</i>	54%	6	100%
Australia	61%	5	6%
China	85%	3	4%
Germany	49%	7	16%
Spain	55%	9	12%
France	48%	8	17%
Italy	49%	9	8%
Netherlands	33%	11	5%
Norway	40%	9	2%
Sweden	38%	7	3%
United States	70%	6	26%

* Based on IPS 2017 FY data

Indicates where ranking is lower (+4 from inbound markets)

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	24% ↑	25% ↑
Other countries have better experiences	19% ↑	28% ↑

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



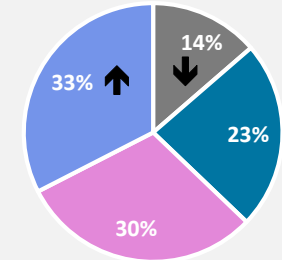
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	10%	5% ↓
AUTHENTIC to England	13%	12%
Immerse in CULTURE / HISTORY	18%	13%
Create distinctive MEMORIES	23%	27%
CHALLENGE - Something they can't do at home	15%	27%

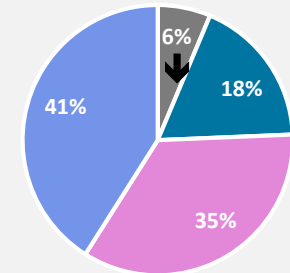
INFLUENCE ON HOLIDAY DECISION

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

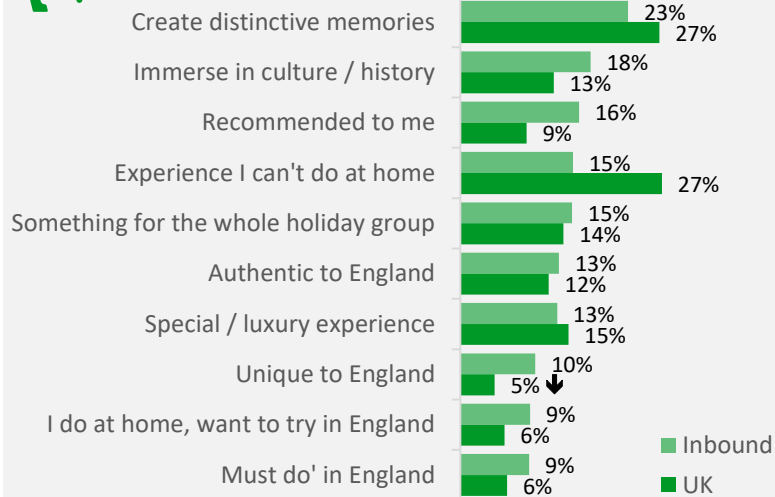


VINEYARD TOUR & TASTING: OPTIMISING THE POTENTIAL



DISCOVER THE WINE MAKING PROCESS AND TASTE IT TO

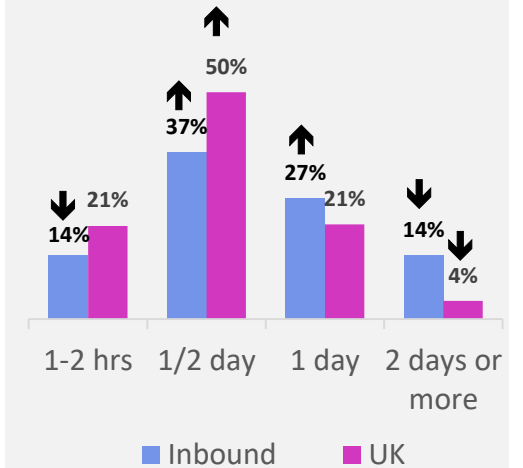
MESSAGES TO AMPLIFY



CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Experiencing rural life / scenery – 33%	Experiencing rural life / scenery – 41%
Other food & drink experiences – 28%	Exploring history & heritage – 33%
Other experiences of interest	
Distillery or brewery experience – 85%	Distillery or brewery experience – 87%
Street food tour & tasting – 84%	Street food tour & tasting – 80%

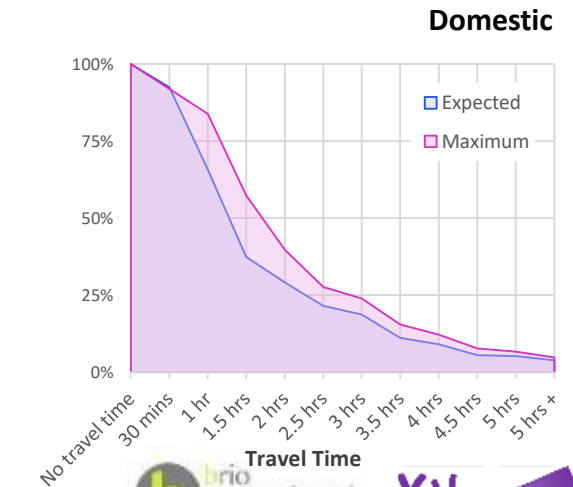
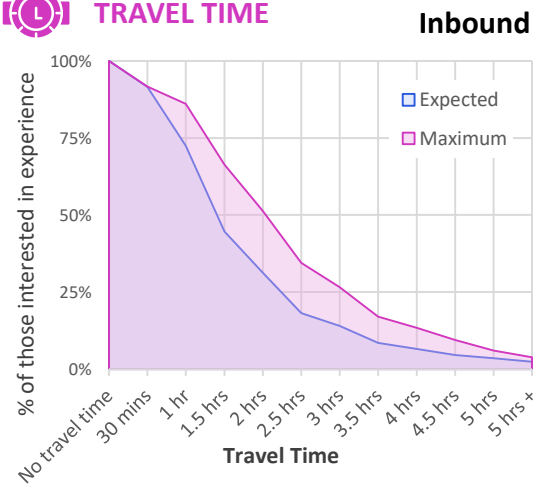
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



VINEYARD TOUR & TASTING: BOOKING BEHAVIOURS

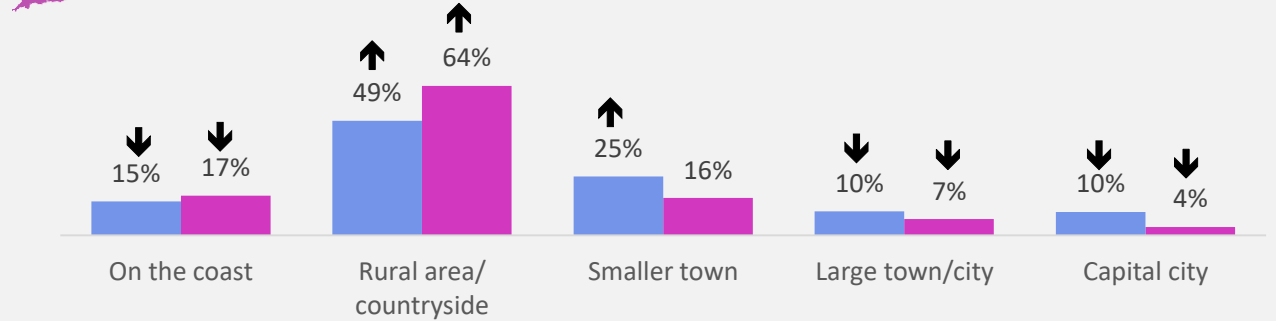
DISCOVER THE WINE MAKING PROCESS AND TASTE IT TO



RESEARCH CHANNELS

	Inbound	UK
General internet search	36%	56%
Traveller Review Site	27%	27%
Travel Agent	23% ↑	13%

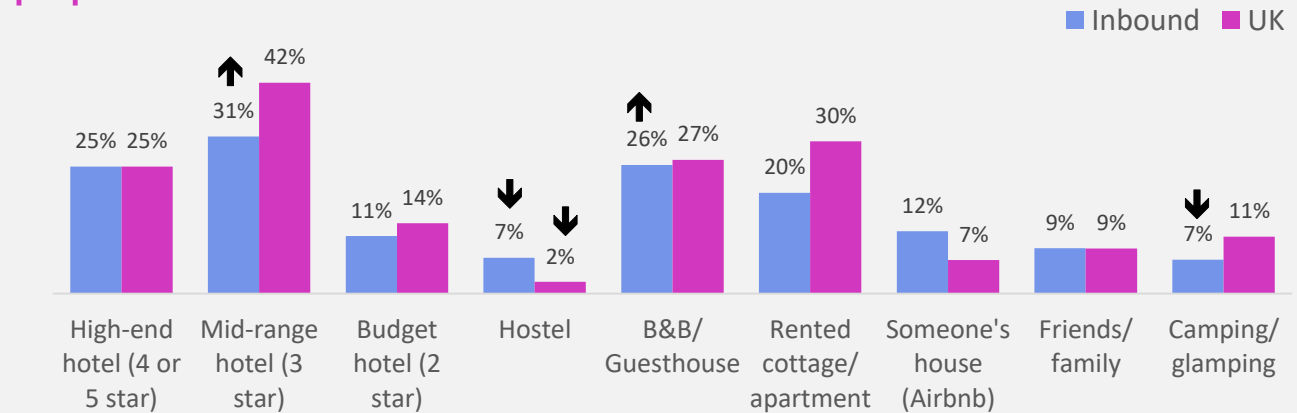
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	58%	58% ↓
Booked in destination	29%	30% ↑

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



VINEYARD TOUR & TASTING: GO TO MARKET CHECKLIST

DISCOVER THE WINE MAKING PROCESS AND TASTE IT TO



Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	No	Not generally seen as English, but opportunity to promote English wine
Current country ownership of the experience	France	And other better known wine-producing countries
Provide enrichment , fun, challenge or learning	Potential	Get involved in wine production with a family/friends group
Create distinctive memories to keep and share	Yes	Not something that can be done elsewhere so a clear holiday memory
Provide cultural or historical immersion	Potential	Promoting the history of English wine and connection with other English food and drink experiences
Expert-led or self-guided option	Expert-Led	More personalised experiences to drive bookable, higher value product
Need to mitigate for the weather	Yes	Poor weather will impact this activity, though indoor elements of the process can be promoted
Established, known and understood experience	Yes	Important to create a truly English experience
Accessing the target audience	Over 55's	Potential to develop an experience that will appeal to the younger travellers too
Bookable product	Potential to Increase	Currently less likely to be pre-booked than other activities. Strong promotion through the trade to drive pre-bookings
Local promotion and in-destination bookings	Important	As an add-on activity, local promotion and traveller reviews are essential
Acceptable journey times	Short	Currently limited willingness to travel more than an hour
Fixed duration or variable length activity	½ day	Assumed to be half-day experience, though could extend to a whole day
Packaging with other activities	Yes	Other food and drink experiences, potentially as part of a themed package