

Cheese Making Class – Learn to make local cheese



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

All ages, slight skew to older travellers
 Gender neutral
 Buzzseekers & Adventurers (Inbound)
 Couples/family activity

Similar Food & Drink Learning Experiences

- (included in the research)
- Cookery class
 - Chocolate making class
 - Baking school



ENGLAND APPEAL

- For ‘cheese enthusiasts’ this experience provides not only opportunity to **learn about the cheese-making process** but also **the history of cheese in England**
- England has **many traditional cheeses** across regional England so multiple experience opportunities exist



CHALLENGES

- **France** is the leading destination for cheese-making with **Netherlands, Italy and Switzerland** also well-known for cheese. Whilst England’s cheese-making credentials are known in the domestic market, the inbound audience are not so aware.
- For some it seems **a boring activity** and not one for a holiday
- Inbound travellers have concerns around **journey times and accessibility**. Communicating location to this audience may need reference to the nearest gateway or large town



OPPORTUNITIES

- Whilst not a driver of holiday choices this experience has potential to be an **add-on activity** alongside other rural activities and exploration of England’s history and culture
- Potential to **connect with other activities**, for example wine tasting or other regional attractions to provide a deeper cultural/historic immersion



* See next slide for metrics used to define scorecard metrics

CHEESE MAKING CLASS: EXPERIENCE SCORECARD METRICS

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ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	60%	10	
<i>All Inbound Markets</i>	45%	14	100%
Australia	54%	11	7%
China	76%	15	4%
Germany	40%	12	16%
Spain	40%	16	11%
France	39%	15	17%
Italy	40%	18	8%
Netherlands	25%	15	5%
Norway	30%	17	2%
Sweden	35%	11	4%
United States	59%	14	27%

* 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	20%	9%
Other countries have better experiences	15%	8%

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



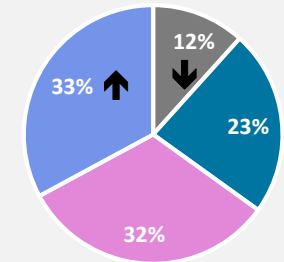
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	11%	12%
AUTHENTIC to England	16%	21%
Immerse in CULTURE / HISTORY	16%	15%
Create distinctive MEMORIES	23%	22%
CHALLENGE - Something they can't do at home	18%	34%

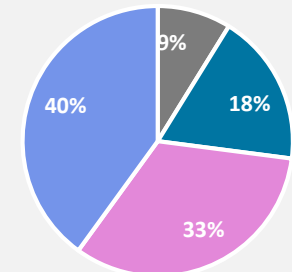
INFLUENCE ON HOLIDAY DECISION

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

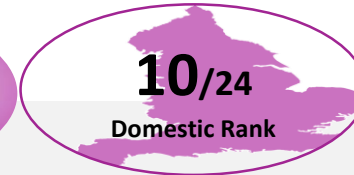
↕ Significantly worse than other experiences



Source: Experiences Research 2019



CHEESE MAKING CLASS: OPTIMISING THE POTENTIAL



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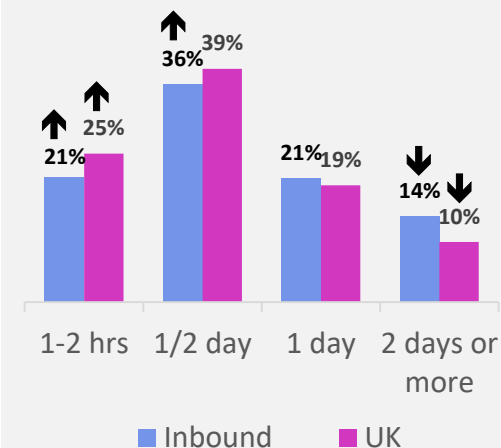
MESSAGES TO AMPLIFY



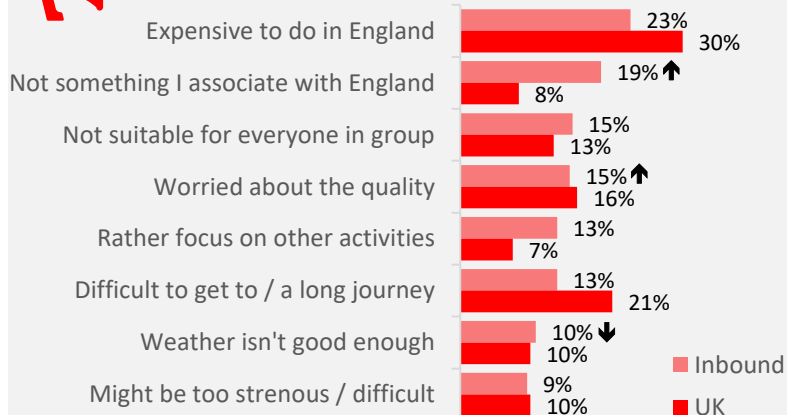
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Experiencing rural life / scenery – 27%	Exploring history and heritage - 26%
Other food & drink experiences – 24%	Experiencing rural life / scenery – 25%
Other experiences of interest	
Street food tour & tasting – 87%	Vineyard tour & tasting – 88%
Distillery / brewery experience – 84%	Distillery or brewery experience – 87%

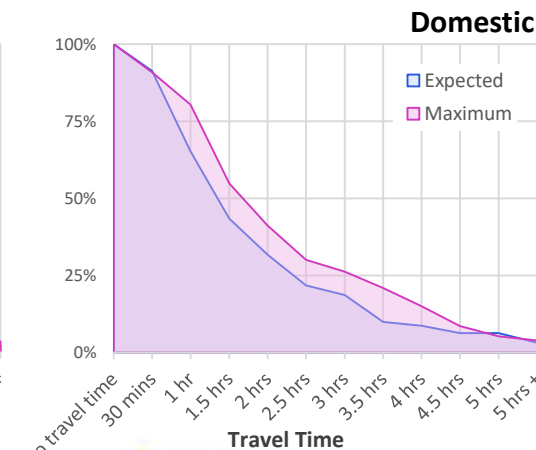
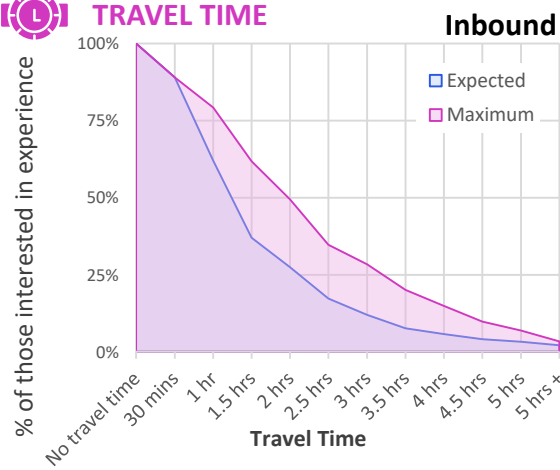
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



CHEESE MAKING CLASS: BOOKING BEHAVIOURS

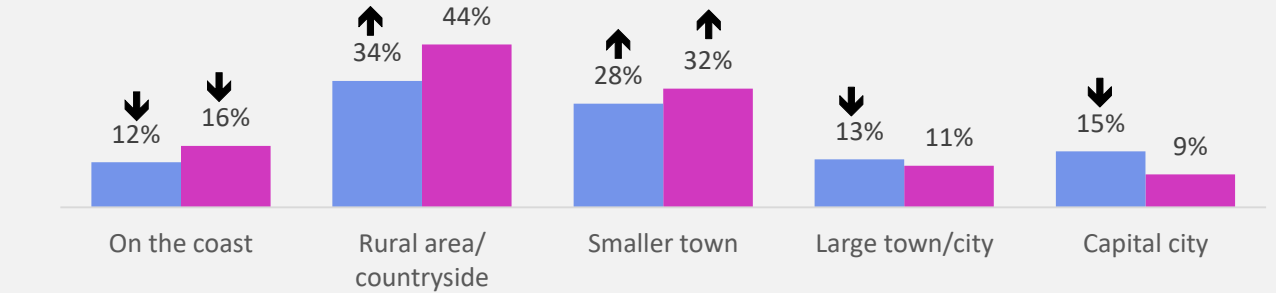
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RESEARCH CHANNELS

	Inbound	UK
General internet search	31%	44%
Traveller Review Site	23%	28%
Travel Guidebook	23%	19%

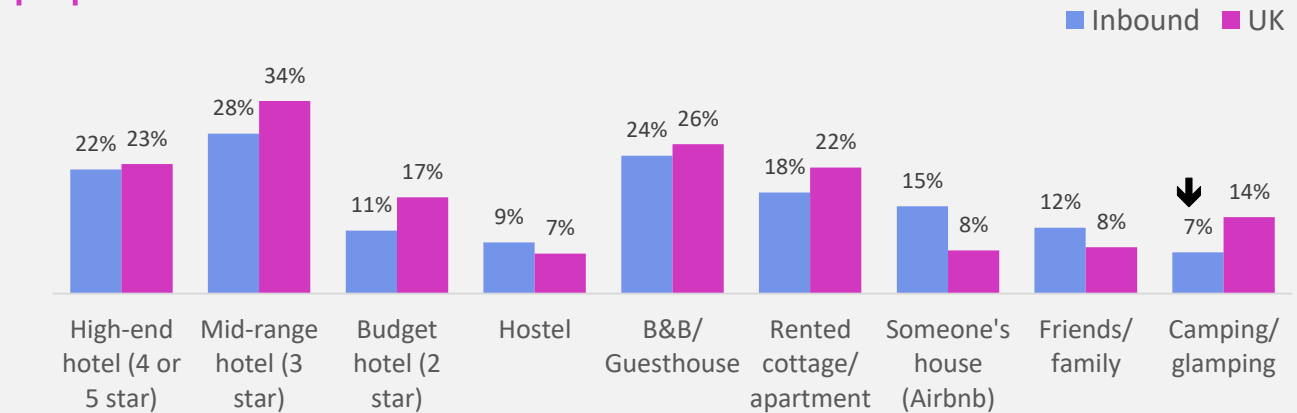
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	56%	62%
Booked in destination	31%	24%

ACCOMMODATION TYPE



Source: Experiences Research 2019

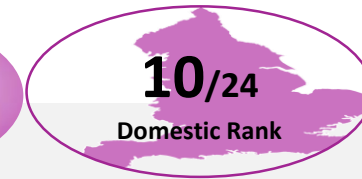
↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



CHEESE MAKING CLASS: GO TO MARKET CHECKLIST

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Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Potential	Cheese is not unique to England, but English cheeses are, so there is potential to build awareness and reputation
Current country ownership of the experience	Several	Other countries more well known for cheese, but, like wine, there is opportunity to promote English products
Provide enrichment , fun, challenge or learning	Yes	Experience description 'light' enough to appeal as a holiday activity
Create distinctive memories to keep and share	Limited	Individually unlikely to be a strong driver of memories, but as part of a local cultural experience package could be more memorable
Provide cultural or historical immersion	Yes	The history of cheese-making and the people involved has some interest
Expert-led or self-guided option	Expert-led	Expertise could cover current production methods, history of cheese-making and the local community and/or in culinary uses of the cheese
Need to mitigate for the weather	Potentially	Experience may be indoors but weather may impact accessibility
Established, known and understood experience	Limited	Needs positioning as an inspiring holiday activity
Accessing the target audience	Mainstream	Communicate the suitability for traveller types – children, accessibility etc
Bookable product	Potential	Trade promotion as part of a local package
Local promotion and in-destination bookings	Important	Drive incremental bookings through local promotion and traveller reviews and recommendations
Acceptable journey times	Limited	Accessibility and journey times are potential barriers especially for inbound
Fixed duration or variable length activity	Short	Half-day maximum unless combined with other activities
Packaging with other activities	Yes	Other local foods, cookery courses, the caves where cheese is stored, vineyards/cider orchards, farms where milk comes from etc.