

Baking School – Learn to make regional specialities such as cakes, pastries, bread



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

- + Younger domestic audience
- + Females
- + BuzzSeekers, Adventurers(Inbound)
- More likely to be done alone

Similar Food & Drink Learning Experiences

- (included in the research)
- Cookery class
 - Cheese making class
 - Chocolate making class



ENGLAND APPEAL

- For bakers this was an **ideal hands-on and fun activity** to do on holiday. A minority saw it as a particularly fun activity for families. It can also be seen as a more serious learning experience to be done alone. This presents a broad spectrum of experience types that could be developed



CHALLENGES

- France and Italy most popular destinations currently
- For inbound travellers it is perceived as something that would be **expensive** to do in England
- It is currently seen as an **urban activity** and is not generally driving choice of holiday destination



OPPORTUNITIES

- With the success of programmes such as Masterchef and The Great British Bake Off **interest in cookery-based activities is high** and enables England to be promoted as 'go-to' destination
- For a more authentic experience, making English bread/pastries or attending a class set in an old English bakery/mill would add appeal.



* See next slide for metrics used to define scorecard metrics

BAKING SCHOOL: EXPERIENCE SCORECARD METRICS

LEARN TO MAKE REGIONAL SPECIALITIES SUCH AS CAKES, PASTRIES, BREAD



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	60%	12	
<i>All Inbound Markets</i>	48%	12	100%
Australia	55%	8	6%
China	76%	12	4%
Germany	37%	15	14%
Spain	47%	12	12%
France	42%	14	17%
Italy	46%	12	9%
Netherlands	33%	10	6%
Norway	38%	10	3%
Sweden	31%	15	3%
United States	64%	9	27%

* Based on IPS 2017 FY data

Indicates where ranking is

- lower (+4 from inbound markets)
- higher (+4 from inbound markets)

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	21%	5%
Other countries have better experiences	17%	8%

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



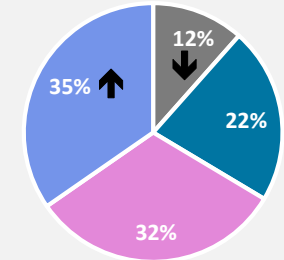
CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
UNIQUE to England	12%	12%
AUTHENTIC to England	19% ↑	18%
Immerse in CULTURE / HISTORY	14% ↓	10%
Create distinctive MEMORIES	23%	25%
CHALLENGE - Something they can't do at home	15%	22%

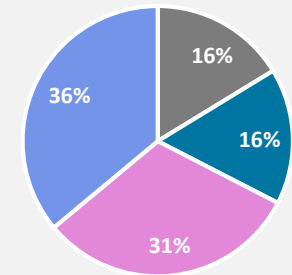
INFLUENCE ON HOLIDAY DECISION

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

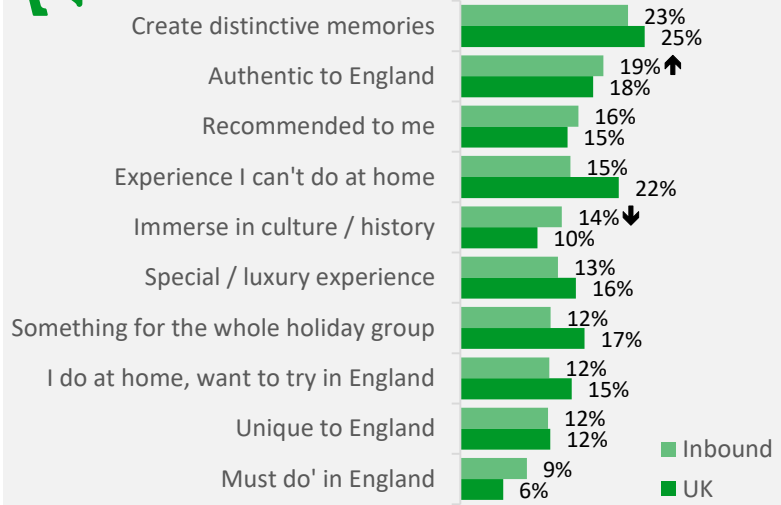


BAKING SCHOOL: OPTIMISING THE POTENTIAL

LEARN TO MAKE REGIONAL SPECIALITIES SUCH AS CAKES, PASTRIES, BREAD



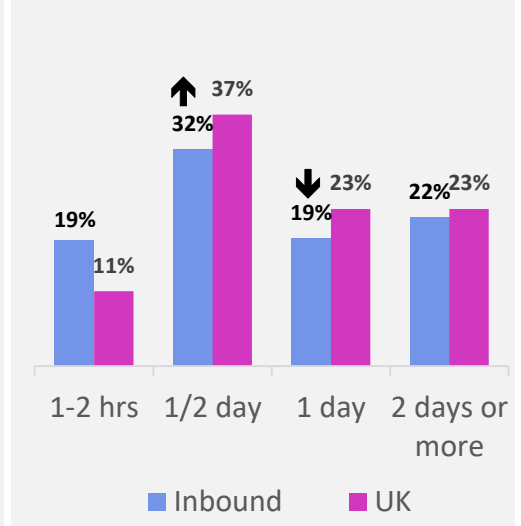
MESSAGES TO AMPLIFY



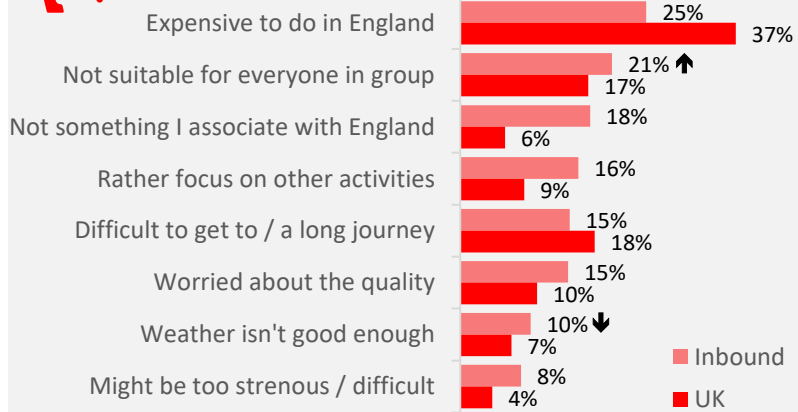
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Other food & drink experiences – 27%	Shopping – 27%
Shopping – 26%	Other learning experience – 20%
Other experiences of interest	
Street food tour & tasting – 88%	Cookery class – 89%
Cookery class – 86%	Chocolate making class – 86%

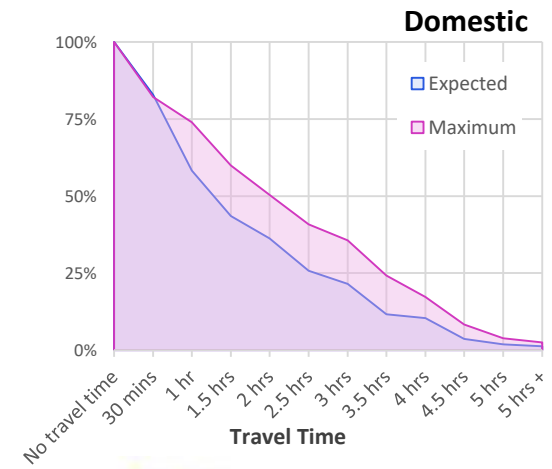
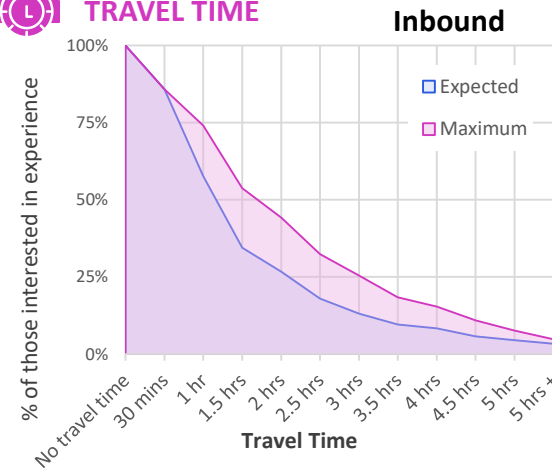
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



BAKING SCHOOL: BOOKING BEHAVIOURS

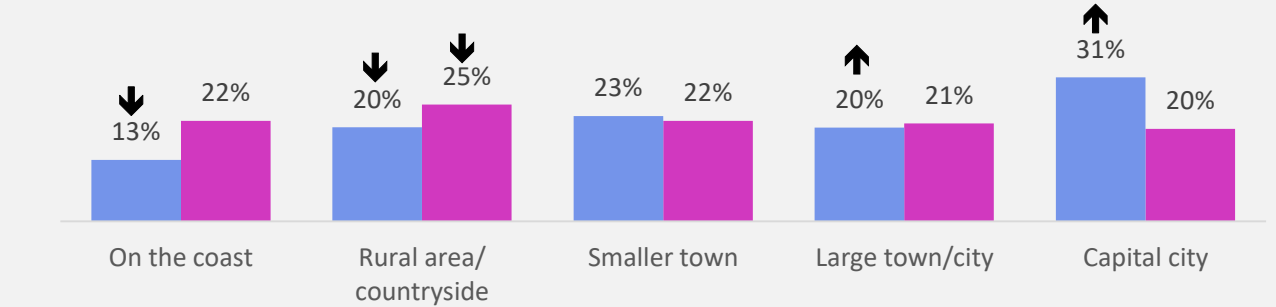
LEARN TO MAKE REGIONAL SPECIALITIES SUCH AS CAKES, PASTRIES, BREAD



RESEARCH CHANNELS

	Inbound	UK
General internet search	32%	43%
Traveller Review Site	25%	20%

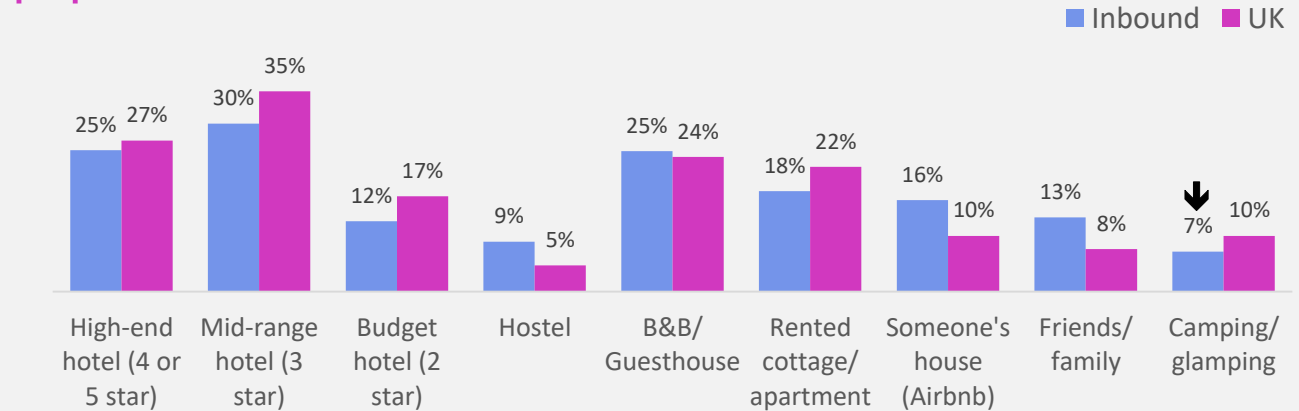
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	57%	66%
Booked in destination	29%	19%

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



BAKING SCHOOL: GO TO MARKET CHECKLIST

LEARN TO MAKE REGIONAL SPECIALITIES SUCH AS CAKES, PASTRIES, BREAD



Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Potential	Build on international franchising of Great British Bake-Off and/or regional specialities
Current country ownership of the experience	France	Need to promote English credentials for baking
Provide enrichment , fun, challenge or learning	Potential	Depending on the type of experience can be fun or educational
Create distinctive memories to keep and share	Potential	If offered as a group/family experience or for the individual learning experience
Provide cultural or historical immersion	Potential	The local history of the speciality and/ or through choice of location
Expert-led or self-guided option	Expert-led	More personalised courses/famous tutor to command price-premium
Need to mitigate for the weather	No	Could be an alternative experience for weather-dependent ones
Established, known and understood experience	Yes	Clarity for each specific experience around level of skill needed, intensity etc.
Accessing the target audience	Younger, Alone	Currently generally seen as a 'serious' activity though could be child-friendly too
Bookable product	Yes	Particularly for longer courses. Positive traveller reviews are important
Local promotion and in-destination bookings	Potential	As add-on experience or alternative for weather affected activities
Acceptable journey times	Short	Either at, or close to accommodation, currently seen as an urban activity
Fixed duration or variable length activity	Variable	Most assume half day, but potential to offer extended courses
Packaging with other activities	Potential	Combine with other food & drink activities or with other unique/cultural regional experiences