

## Distillery / Brewery Experience – Discover the beer-making or gin-distilling process and taste it too

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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	★★★★☆

# DISTILLERY / BREWERY EXPERIENCE: SUMMARY

DISCOVER BEER-MAKING OR GIN-DISTILLING PROCESS AND TASTE IT TOO



## EXPERIENCE SCORECARD METRICS\*

Star rating – low to high

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

## DEMOGRAPHIC SKEWS

- + over 55s
- + Male
- + BuzzSeekers, Adventurers (Inbound)
- + Couples, Friends

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

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



## ENGLAND APPEAL

- An **established activity with broad appeal** to adult travellers
- The **challenge for England** specifically is that there is confusion with both **Scotland (whisky distilleries) and Ireland (brewery)** and so a specifically English experience will need to offer something different such as cider in Somerset



## CHALLENGES

- Currently seen as a **UK and Germany** experience, but as noted above much of the current interest in England may be confused with knowledge of Scotland (distilleries) and Ireland (breweries)
- For **non-drinkers this activity was a turn-off**. Some expressed concerns that the experience would be 'a little rowdy'
- It is typically not a driver of destination choice and so is more likely to be an **'add-on' experience**



## OPPORTUNITIES

- Other activities of interest are those connected to history and heritage, adding to the **immersive English experience**
- Potential to combine with other experiences such as **food-related experiences**



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

Qualitative / Quantitative Combined Summary  
Source: Experiences Research 2019



# DISTILLERY / BREWERY EXPERIENCE: SCORECARD METRICS

DISCOVER BEER-MAKING OR GIN-DISTILLING PROCESS AND TASTE IT TOO



ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
<b>UK (Domestic)</b>	75%	1	
<i>All Inbound Markets</i>	67%	2	100%
<b>Australia</b>	67%	2	5%
<b>China</b>	79%	9	3%
<b>Germany</b>	64%	2	16%
<b>Spain</b>	66%	3	12%
<b>France</b>	68%	2	19%
<b>Italy</b>	71%	1	10%
<b>Netherlands</b>	50%	2	7%
<b>Norway</b>	68%	1	3%
<b>Sweden</b>	66%	1	4%
<b>United States</b>	71%	4	21%

\* 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	13% ↓	7% ↓
Other countries have better experiences	12% ↓	9%

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

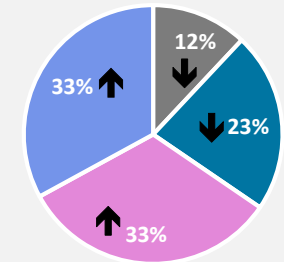
## CORE COMPONENTS OF EXPERIENTIAL

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

	Inbound	UK
<b>UNIQUE</b> to England	14%	9%
<b>AUTHENTIC</b> to England	27% ↑	17%
Immerse in <b>CULTURE / HISTORY</b>	19%	16%
Create distinctive <b>MEMORIES</b>	27%	26%
<b>CHALLENGE</b> - Something they can't do at home	17% ↓	25%

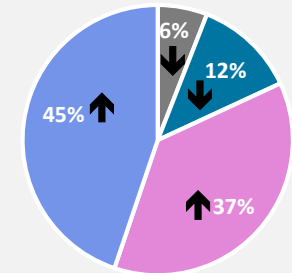
## INFLUENCE ON HOLIDAY DECISION

**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

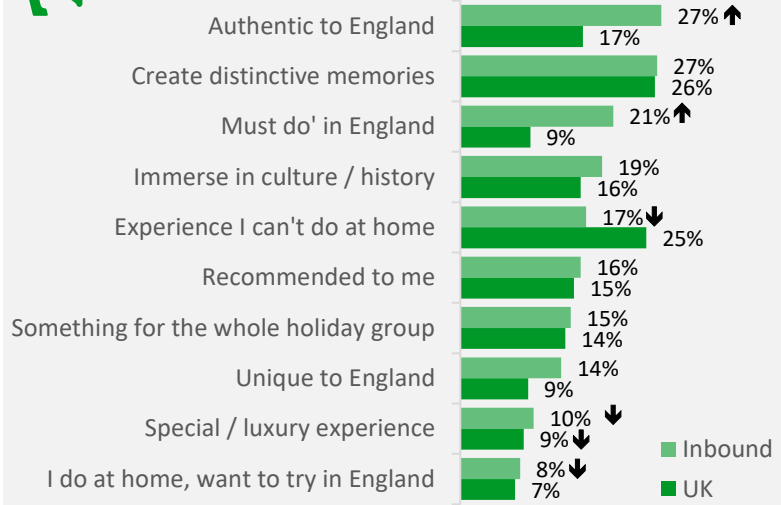


# DISTILLERY / BREWERY EXPERIENCE: OPTIMISING THE POTENTIAL



## DISCOVER BEER-MAKING OR GIN-DISTILLING PROCESS AND TASTE IT TOO

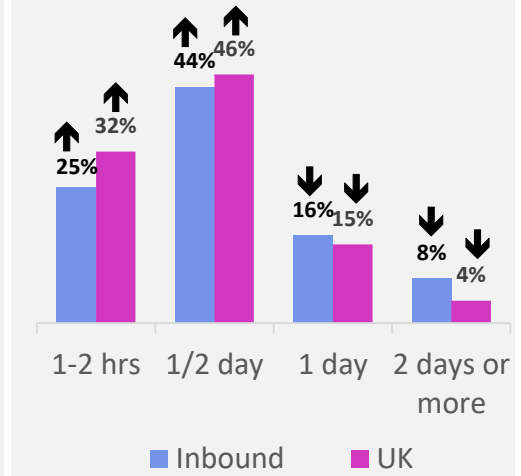
### MESSAGES TO AMPLIFY



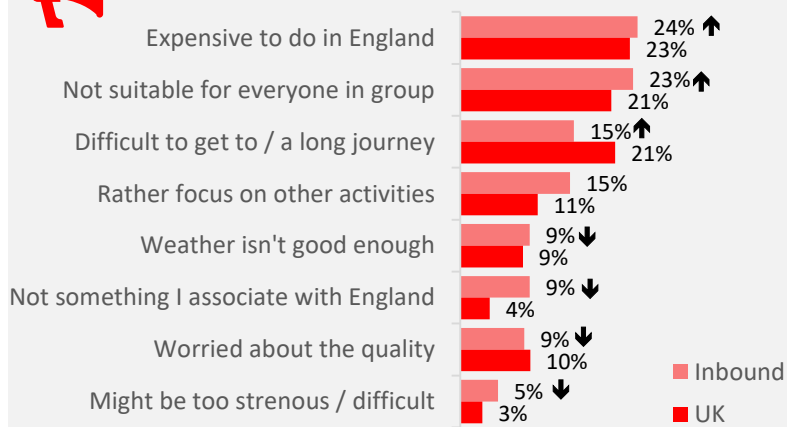
### CROSS-OVER INTEREST

Inbound	UK
<b>Cross-over activities</b>	
Exploring history & heritage – 32%	Exploring history & heritage – 34%
Visiting famous / iconic places – 31%	Visiting famous / iconic places – 32%
<b>Other experiences of interest</b>	
Street food tour & tasting - 77%	Vineyard tour & tasting – 86%
'Life behind the scenes' – 77%	Street food tour & tasting - 78%

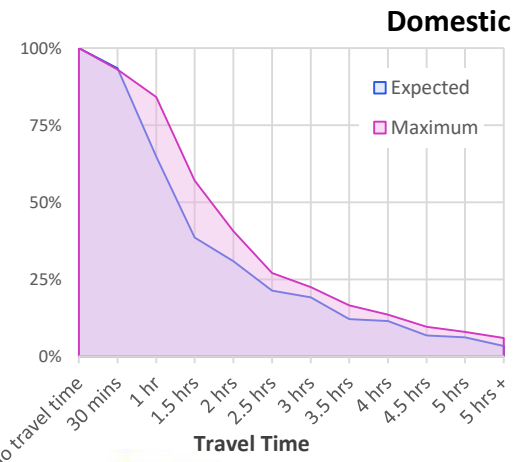
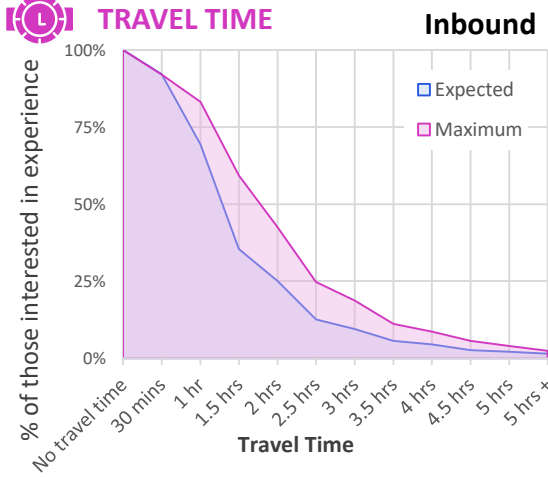
### EXPERIENCE DURATION



### BARRIERS TO ADDRESS



### TRAVEL TIME



# DISTILLERY / BREWERY EXPERIENCE: BOOKING BEHAVIOURS

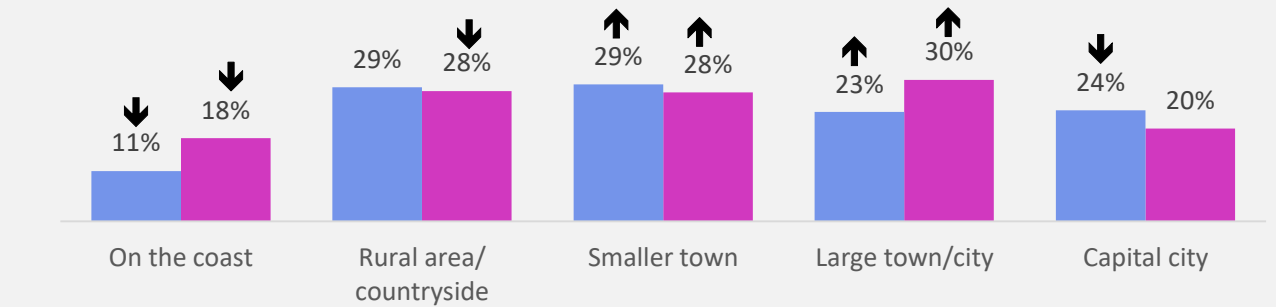
DISCOVER BEER-MAKING OR GIN-DISTILLING PROCESS AND TASTE IT TOO



## RESEARCH CHANNELS

	Inbound	UK
General internet search	43% ↑	56%
Traveller Review Site	31% ↑	30%
Travel Guidebook	29% ↑	22%

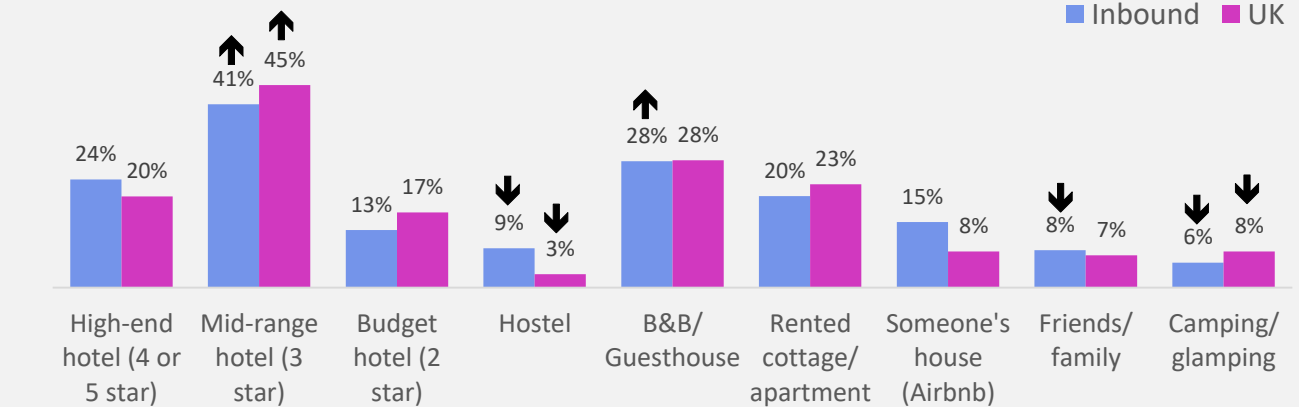
## LOCATION TYPE



## BOOKING METHOD

	Inbound	UK
Booked before leaving home	48% ↓	55% ↓
Booked in destination	38% ↑	31% ↑

## ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



# DISTILLERY / BREWERY EXPERIENCE: GO TO MARKET CHECKLIST



DISCOVER BEER-MAKING OR GIN-DISTILLING PROCESS AND TASTE IT TOO

Experience Attributes	Experience Performance	Consideration for action
Positioning as <b>authentic and unique</b> to England	Strong	Reputation for beer, potential to expand to cider, gin etc.
Current <b>country ownership</b> of the experience	England	Along with Germany, but caution that there is confusion with Scotland and Ireland
Provide <b>enrichment</b> , fun, challenge or learning	Limited	Currently not seen as an immersive activity
Create <b>distinctive memories</b> to keep and share	Limited	Opportunity to offer a different type of experience; hands on involvement in the process rather than just tour and tasting
Provide <b>cultural</b> or <b>historical immersion</b>	Strong	Established link to England and can be amplified through other activities
<b>Expert-led</b> or self-guided option	Either	Opportunity to offer more immersive, individual/small-group guide
Need to mitigate for the <b>weather</b>	No	Indoor activity, though weather may impact accessibility
<b>Established, known</b> and <b>understood</b> experience	Yes	Clear understanding of established activity, therefore need to create and communicate points of differentiation and reasons to visit
Accessing the <b>target audience</b>	Mainstream	Typically older, male adult audience
<b>Bookable product</b>	Limited	Booked in advance as part of a package
Local promotion and <b>in-destination bookings</b>	Important	Local recommendation and reviews are key as for many it's an in-destination decision
Acceptable <b>journey times</b>	Short	Expectation of towns and rural locations but typically up to an hour journey time. Accessibility is an important element to communicate
<b>Fixed duration</b> or <b>variable length</b> activity	½ day	½ day or less is expected and is unlikely to drive destination choice
<b>Packaging</b> with other activities	Yes	Likely to be part of package including major English attractions