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# How to Conduct a Successful Tea Tasting Event

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How to Conduct a Successful Tea Tasting Event

by

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## Part One

### Introduction

Second only to water, tea is the most widely consumed beverage in the world (Tea Association of the USA, 2011b). The history of tea is long and interesting. Legend says a Chinese Emperor discovered tea quite accidentally when a leaf from a tea tree blew into his boiling water pot. He drank the liquid felt refreshed and ordered that the trees be planted in his garden, thus the first cultivation of the tea plant began (Lam & Lam, 2002). All pure tea comes from the *Camellia sinensis* plant, produced from the leaves and leaf buds of various cultivars and sub-varieties. The many different kinds of tea produced throughout the world depend on the variety of the plant, the curing and processing of the leaves, and the grade of the leaves (Pratt, 2005).

Increasing contact between China and Europe in the 16<sup>th</sup> and 17<sup>th</sup> centuries brought tea to Europe and eventually to England in the late 1650's. Quite possibly the first recorded tea tastings were by Catherine of Braganza, a tea-drinking Portuguese princess who arrived in England in 1662 to marry Charles II. Catherine brought with her a supply of tea and offered the brew to her friends at court, gradually giving the drink upper class cachet and making it attractively fashionable (Pettigrew, 2004). Tea was brought to the U.S. in 1650 by the Dutch. When the British took control of New Amsterdam in 1674 and renamed it New York they found tea drinking was already well established and as important here as in Europe. (Pettigrew & Richardson, 2008). For quite a few years following World War II traditional tea drinking rituals fell by the wayside. In the early 1980's the first evidence of a tea renaissance became apparent in the U.S., United Kingdom, Japan and all over Europe (Pettigrew, 2004).

An overview of the U.S. market presented recently at Work Tea Expo, June 2011 provides the following information; in 2011 tea retail and foodservice will top \$8.5 billion

(Packaged Facts, 2011), in 2010 US tea imports increased 18% to set a record (Tea Association of the USA, 2011a). Twenty eight percent of Americans drink freshly brewed tea hot or cold daily (Packaged Facts, 2011). In 2010 there were an estimated 3,000 specialty outlets in the U.S. (Tea Association of the USA, 2011a). What better way to increase awareness of a beverage that is purported to have health benefits, and is associated with comfort, serenity, and calm than to have a tea tasting? Perhaps the most important benefit is the almost subconscious awareness of the “Zen” of tea, the sense that the preparation and brewing of the leaf, the courteous offering, and harmonious sharing creates a peaceful space in peoples’ lives (Heiss & Heiss, 2007).

#### Purpose

The purpose of this paper is to create a handbook for planning and executing a successful tea tasting event.

#### Statement of objective

Hosting a tea tasting event can be challenging for small tea shop owners or owners new to the industry. Knowledge of tea is not a guarantee a tea tasting will be a success. This handbook will be a reference for tea rooms, coffee shops, spas, restaurants, hotels, and gourmet retail outlets or shops to use when planning a tea tasting events. The objective is to provide tea rooms, coffee shops, spas, restaurants, hotels, gourmet retail outlets or shops and others in the tea industry with the tools to hold a successful tea tasting event. Each tea tasting event will have different requirements, but the goals will probably be the same, to increase sales. The handbook will serve as a guide or road map to a creating successful event. Starting with the benefits of holding a tea tasting, the next challenge is to determine the style of tasting appropriate for the location. The style of tasting determines the equipment needed for the tasting. Marketing the tea tasting event to the appropriate market is critical to success. Next comes preparation, then

execution of the event. Finally, one often overlooked task that should be part of every event is evaluation of the event.

### Justification

As with any business, tea rooms, coffee shops, spas, restaurants, hotels, gourmet retail outlets or shops and others in the tea industry are always looking for ways to increase sales. These businesses are missing out on the marketing opportunities provided by a tea tasting event. Some of the benefits of a tea tasting event are educating customers, establishing expertise, gaining customer loyalty, building a customer database, and generating revenue. A tea tasting could be used for a new product or product line introduction. A tea tasting event is a value added customer experience. This handbook will help tea rooms, coffee shops, spas, restaurants, hotels, gourmet retail outlets or shops, and others in the tea industry use tea tastings as a marketing tool to increase sales of tea and tea wares.

## Part Two

### Introduction

Part One gave a brief history of tea in general and tea in the U.S. This section reviewed what all events have in common and benefits of having a tea tasting event. Important to the growth of the industry, the forecast for tea sales and tea product introductions in the U.S. was reviewed. It was also important to review the claims of health benefits of tea and the claims that can and cannot be made when selling tea. And repeat that caution be used when making claims of the health benefits.

### Literature Review

#### Tea Industry

The estimated 3,000 specialty tea outlets in the U.S. present appealing and diverse choices for tea consumers (Tea Association of the USA, 2011a). Depending on their location tea consumers could encounter:

- high-visibility, high-traffic tea merchants such as Teavana and DavidsTea in malls and suburban shopping centers;
- specialty drink outlets, tea lounges, and urban tea bars that serve alcohol in major metropolitan areas;
- traditional afternoon tea in upscale hotels and weekend leisure stops in Victorian tea rooms; or
- tea-themed spas and trend-setting resorts catering to young professionals seeking a calming Oriental-influenced refuge (Sage Group, 2006).

Businesses should capitalize on this exposure and incorporate tea tasting events into existing marketing plans. The possibilities for tea tasting events are endless and research indicated market share for specialty teas are on an upward trend.

Mintel Group Ltd. (Mintel), a London based market research firm, projected sales of tea to be \$2.9 billion at the end of 2011 and substantially increase to \$4 billion in 2015. In the non-alcoholic beverage sector, tea was overall one of the most active beverage categories in the U.S. between 2005 and 2010. The top three new introductions of tea products between 2005 and 2010 were led by tea bags at 47.9%, ready-to-drink iced tea 27.5%, and loose leaf tea at 11.7% (Mintel, 2011). Tea has been one of the growth segments in the beverage industry. The growth in part, could be attributed to perceived or actual health benefits, unique flavors, functional benefits that consumers can feel, but first and foremost tea is both refreshing and relaxing. U.S. consumers are most familiar with mass marketed teas found in grocery stores. Tea tastings provide an opportunity to introduce customers to varieties they have not experienced. Mintel expects the trend toward specialty tea to continue to grow as the U.S. has seen a growth in specialty tea stores and tearooms. Nearly one fifth of all tea drinkers reported buying tea from a high-visibility, high-traffic tea merchant such as Teavana. Similarly, one fifth of all tea drinkers said they liked going to teahouses and or tearooms to drink tea. Mintel's report suggested some marketing strategies for bagged/loose tea manufacturers could include setting up brewing stations in supermarkets and showing customers how to brew a perfect cup of tea every time. Other efforts could include setting up pots of brewed iced and hot tea and have consumers taste a new product. High-visibility, high-traffic tea merchant Teavana takes such an approach, and had increased sales of the tea sampled in the tea tasting. Introducing someone to a wonderful

Taiwanese Oolong or an earthy Yunnan Puer allows for small indulgences consumers seek as an affordable luxury.

Mintel surveyed 1,800 internet users aged 18 and over who purchased non-alcoholic beverages for themselves or their households and found many teas are virtually unknown by mainstream consumers. Black, green, and lemon flavored teas were rated as “my favorite tea”. Likewise black, green, and lemon flavored tea rated as “a flavor I like”.

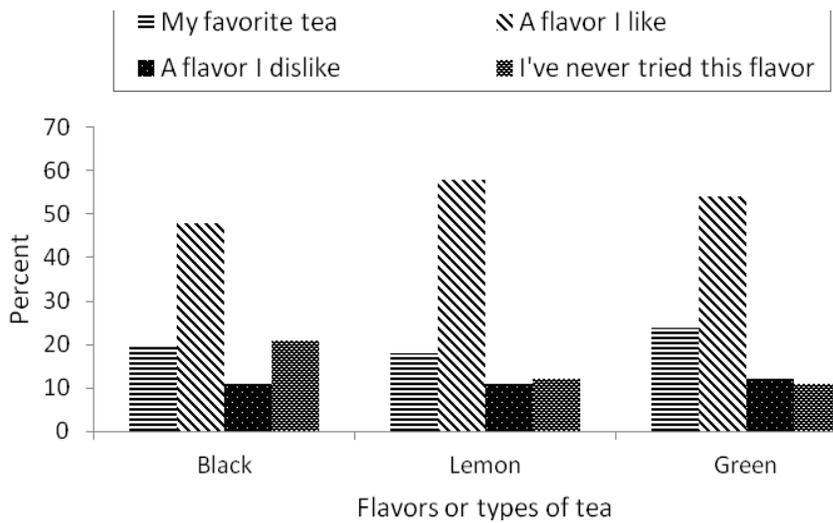


Figure 1. Attitudes toward various tea flavors or types. Adapted from Mintel International Group Ltd. (2011). *Tea and RTD teas – US – July 2011* Chicago, IL: <http://www.mintel.com>

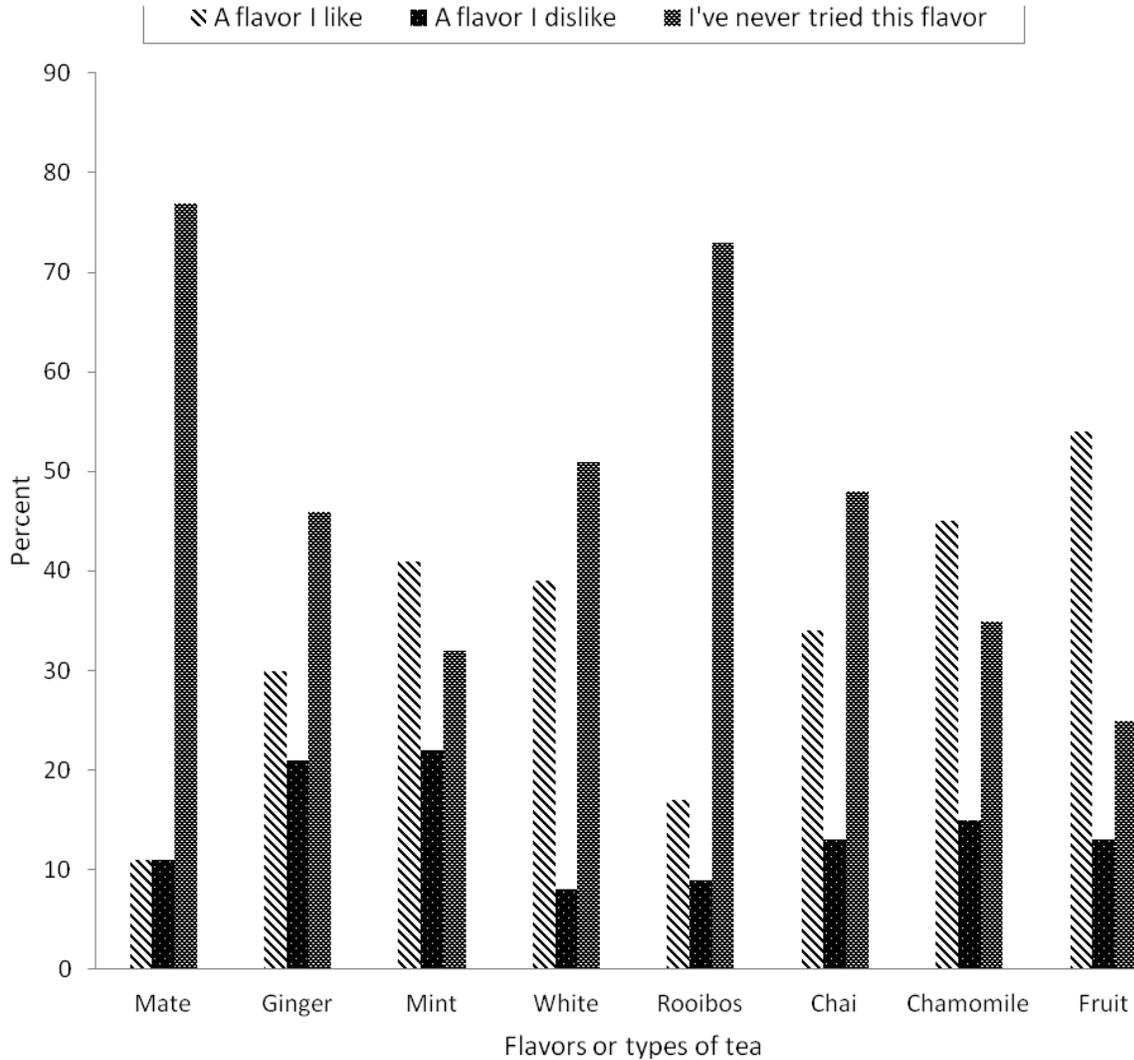


Figure 2. Attitudes toward various tea flavors or types. Adapted from Mintel International Group Ltd. (2011). *Tea and RTD teas – US – July 2011* Chicago, IL: <http://www.mintel.com>

Figure 2 indicates mainstream consumers were unfamiliar with many flavors and styles of tea. Including these teas in a tea tasting event would provide the opportunity for consumers to try properly prepared flavors or types new to them. Tea tasting events are value added customer experiences that establish expertise and gain customer loyalty. With that expertise come certain responsibilities and legal restrictions.

## Tea and Health Claims

Any professional in the tea business needs to have a basic understanding of the role tea plays in maintaining good health. Tea contains flavonoids, naturally occurring compounds believed to have antioxidant properties. Antioxidants work to neutralize free radicals, which scientists believe, over time, damage elements in the body, such as genetic material, lipids, and contribute to chronic disease (Tea Association of the USA, 2011b). Tea's functional benefits appear to be relatively well understood by consumers, but tea professionals must take care when stating health benefits. Federal law prohibits claims that state or imply that a food will diagnose, cure, mitigate, treat, or prevent disease. The U.S. Department of Health and Human Services department that enforces the law is the U.S. Food and Drug Administration (U.S. FDA). The exceptions to this law are, authorized health claims, structure function claims, and quantitative statements about healthful ingredients or nutrients (Tea Association of the USA, 2011b).

What is a health claim? A claim that expressly or by implication characterizes the relationship between a food or food ingredient and a disease or health related condition (U.S. FDA, 2011a). Health claims are permitted only if:

- Expressly authorized by the Food and Drug Administration, based on “significant scientific agreement” (or appropriately “qualified”); or
- Based on an “authoritative statement” of a qualified U.S. government scientific body (for example, National Academy of Sciences, National Institutes of Health, National Library of Medicine or Center for Disease Control).

What is a structure function claim? A claim that describes the effect of a food or a nutrient on the structure or function of the body (U.S. FDA, 2011b).

- No express or implied reference to disease (cancer, heart disease, etc.);

- Stated in terms of support for a healthy state, not treatment or prevention of a disease.

Structure function claims that can be made about tea without problems (Tea Association of the USA, 2011b).

- Tea is heart healthy;
- Tea promotes cardiovascular health;
- The flavonoids in tea promote heart health;
- Tea contains heart healthy flavonoids;
- Tea has antioxidant flavonoids that can neutralize free radicals;
- Studies suggest that flavonoids in tea promote healthy circulation.

### Tea Tasting

The parallels between tea and wine are abundant. Like wines, teas are fundamentally an agricultural product, subject to all the vagaries of Mother Nature (Harney, 2008). In tea and wine, cultivation, harvest, and processing determines the end product. Grape vines and tea bushes are cultivated with definite respect to certain climatic conditions. The importance of the soil, amounts of rainfall, sunlight, humidity and terrain play crucial roles in producing teas and with particular differences in color, body and aroma. Tea and wine have substantial differences as beverages, but the similarities in the tasting process are striking. Many of the terms and techniques used in tea tasting and wine tastings overlap, although the beverages are each made in completely different ways from different sources and processes. The comparison between tea and wine continue into tasting. The first steps in wine tasting are to examine the visual aspects of the beverage, smell the aroma of the wine followed by tasting the wine (Garr, 2011).

The actual tasting portion of a tea tasting can be broken down into five simple steps (Harney, 2008):

1. Examine the dry leaves;
2. Brew the leaves at the proper time and temperature;
3. Look at the tea, both liquor and wet leaves;
4. Smell the tea;
5. Taste the tea.

The planning processes to facilitate these five simple steps are the same if you are planning a tea tasting for two or 100 people.

### Event Planning

Events bring people together to share an experience and produce a measurable outcome. The design and coordination of an event is a comprehensive process (Allen, 2000). Event professionals use a sequential process to consistently produce events that deliver the intended experiences. First they determine the expectations by determining basic information: who what, when, where, and why. Second, they must put together an overall picture of the final event, to be able to incorporate the necessary elements, logistics, operations and practices into the plan. Next, an event professional must envision the experience from beginning to end from the guests' point of view. Finally the event must be choreographed by arranging the elements and layers of detail that will provide a memorable event (Silvers, 2004).

Events are an important marketing tool used by business of all sizes. In a 2005 study cosponsored by Meeting Professionals International, 700 decision-making marketing executives from such industries as automotive, technology, healthcare, financial associations, and manufacturing were interviewed. Among the findings: 96% of the respondents made events part of their marketing mix; nearly that many regarded the importance of events as constant or

increasing; and a majority considered events as a “lead tactic” or a “vital component” in their marketing campaigns (LoCicero, 2008).

Evaluating the success of any event is critical to the success of future events. Develop evaluation strategies from the very beginning by specifying the criteria that indicate success. An evaluation questionnaire for attendees to complete during the event is a common way to collect data for planning future events. A questionnaire can be simple or detailed, but to get a good number of questionnaires returned, it should be kept short. In many cases more questionnaires will be returned if the attendee can remain anonymous. Do not ask for personal information on an evaluation questionnaire. Writing good evaluation questions is not an easy task. Common sense and good grammar are important, but more is required to design good questions.

Relevance and accuracy are the two basic criteria a questionnaire must meet if it is to achieve the purpose. When planning a questionnaire’s design several decisions must be made to ensure the relevant data is collected. Several basic things must be decided 1) What should be asked?; 2) How should each question be phrased?; 3) In what sequence should the questions be arranged?; and 4) What questionnaire layout will best serve the objectives? (Zikmund, 2003).

Questionnaires can provide both qualitative and quantitative information. Qualitative information being attitudes, opinions, preferences, and perceptions asked in the form of open-ended questions. Quantitative data are those factors that can be measured or counted, such as demographics, popularity, improvements, or return on investment. Many questionnaires include both quantitative and qualitative components in the form of closed ended questions with fixed response alternatives and open-ended questions asking the respondent for other comments or opinions pertinent to the topic (Silvers, 2004). Questionnaires should be pretested and refined



In addition to attendee evaluations, it is important the event planner do a post event evaluation. This evaluation could be as simple as making two lists. The first list may be titled “Areas of Improvement” and the second “What Went Right” (Wolf & Wolf, 2005). An honest assessment of any event should be objective and identify everything that went wrong. This evaluation should prevent the same problems occurring in the next event.

### Conclusion

The meetings and event industry is robust and diverse with an abundance of professional journals, books, and articles providing instruction on the planning and execution of many types of events. The first book on tea, *Chá Ching* (Tea Classic), was written in 780 A.D. by Tao Lu Yu and many books devoted to tea have been written since. Books specifically on the execution of a tea tasting event were not found. The creation of *How to Conduct a Successful Tea Tasting Event* handbook will address the absence of an easy to use guide. Keeping in mind the important considerations for tea; the importance of the ritual as a soothing moment; the health benefits; and always remember to promote its good taste.

## Part Three

### Introduction

Tea has been one of the growth segments in the U.S. beverage industry. That growth could be attributed to several factors, perceived or actual health benefits being one. Most U.S. consumers are familiar with mass marketed teas found in grocery stores. For the estimated 3,000 specialty tea outlets in the U.S. tea tastings provide an opportunity to expose consumers to wider variety of teas. Part Three is the handbook that was created to serve as a roadmap or guide for planning and executing a successful tea tasting event. *How to Conduct a Successful Tea Tasting Event* combines the basics of event planning and the basics of tea tasting into one easy to use handbook. The handbook can be found in Appendix A.

### Purpose

The purpose of this paper was to create a handbook for planning and executing a successful tea tasting event.

### Conclusion

The success of any event is in the details. The planning and execution of any event is an involved process that fits together all the details to make the event a success. A tea tasting event is a marketing tool that can be used to increase sales of tea and tea ware. *How to Conduct a Successful Tea Tasting Event* brings together event planning and tea tasting in one easy to use handbook.

## Appendix A

This portion of the paper has been omitted intentionally. It has been published and is available for sale. Should you wish to purchase a copy or have inquiries you may contact

[kaye.polivka@gmail.com](mailto:kaye.polivka@gmail.com).

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