Tourists Attitudes Towards Regional and Local Foods

Prepared for the
Ministry of Agriculture Fisheries and Food and the Countryside Agency

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Executive Summary

Study Context

The primary objective of MAFF and its partners for this project has been to collect data on tourists' attitudes to local food and drink. It was hoped that this research would act as a basis for developing policies to encourage outlets that service tourists to stock more local produce.

To this end, the consumer research has been designed to provide the project team with a sound understanding of the current situation, and clear guidance on how best to promote local produce to both tourists and the food and drink service sector.

Our approach met these objectives through a four phase programme:

- Firstly, we undertook a **literature review** to provide two kinds of evidence. A summary of existing research on the links between tourism and local food and drink consumption, and analysis of current schemes describing their activities and if available evidence evaluating their impact.

- Secondly, we conducted **a national face to face in home survey** of 1600 English residents. This provided a robust national view of holidaymakers' current awareness and interest in regional foods while on holiday and the values associated with local and regional food and drink.

- Thirdly, we conducted 1200 **visitor interviews in four study regions**. This captured information on current use of local food and drink and awareness of local food and drink products available in each region.

- Fourthly, we conducted a series of **hall tests** with 240 holidaymakers who had eaten out to establish their patterns of eating out and what they are looking for from a meal out. This allowed us to identify which elements of the event contribute to an 'excellent experience', and how local food and drink can be used to meet these expectations.

For the sake of readability we refer to 'local foods' meaning food and drink that is locally produced or sold as a local speciality.

Current Knowledge and Practice

As a starting point for the research we carried out a literature review designed to identify any existing research in the area and to summarise current practice and promotional activities. A summary of our conclusions is set out below.

Definitions of Local Food and Drink

- There is no single universally agreed definition of local foods.

- Tourists have often a very vague view of what is 'local', and this is further confused by the increasing universal availability of regional products. 'Local' is part of their definition of 'speciality', but most have not thought deeply about the difference between locally produced and speciality foods. Their perceptions are more linked to geographical knowledge and personal experience than awareness of any official criteria of designation.

- Even government policy uses different definitions for different schemes.

Promotion of Local Food and Drink

- Differing definitions of regional and local produce lead to differing objectives for the schemes that seek to promote and differentiate local and regional foods. Definitions of local food and drink tend to be based on geophysical (e.g. soil type, geographical area) or socio-cultural (e.g. recipes, production processes, food presentation) criteria. However, promotional schemes often combine these different definitions in their approaches. For example EU Protection of Food Names Scheme designates and protects local produce using both geophysical and socio-cultural criteria.

- The three main methods for promoting regional foods are those that focus on designation, marketing and rural development. Promotional schemes usually emphasise, product quality through training and accreditation, locality, and / or supporting sustainable rural economies and environmental practices.

Current Links to Tourism

- Few promotional schemes related to local and regional food and drink directly target the tourism industry. There is also a tendency for local suppliers to focus on product quality, rather than raising awareness, or making local food and drink accessible to visitors as part of their wider holiday experience. However, the Heart of England Tourist Board (HETB) has begun a project to address this.

Food, Drink and Tourists Experience

- In some countries, there are strong perceptual links between food, drink and cultural tourism. In France, Italy and Scotland, tourists closely integrate experience of food and drink within their wider holiday experience. However, in other countries or regions tourist's have little recognition of this element in the culture of the region. Concerted marketing efforts will be required to raise the profile of local products and influence consumer attitudes.

- Local food and drink can play different roles in visitors' holiday experience. Its role can range widely from 'gastro-tourism' at one end of the scale, where people visit a region purely to experience regional food and drink, to the simple satisfaction of the physical need to eat and drink at the other.

- Several sources have indicated that, currently local food groups are not targeted at the tourist market. They are selling quality produce to those seeking distinctive or quality experiences. This suggests 'speciality' possibly at premium prices. Most tourists are looking for 'fun experiences' but not necessarily wishing to pay premium prices for them.

Other Research

- We have found very little academic or other research into the links between regional food and drink and the needs and expectations of visitors whilst on holiday.
- Our desk research revealed that many sources believe that regional food suppliers and restaurateurs are supply led rather than marketing led. They focus on selling produce and ‘adding value’ rather than investigating and meeting consumer needs.
- The consensus has been that there are a range of activities related to the promotion and marketing regional foods, but that there has so far been limited evaluation of the effectiveness of these activities and initiatives.

Research Findings

Market Segmentation

Between 61-69% of holiday makers and visitors to the four sample regions recognise that food in general makes a positive contribution to their holiday, and 39% say that it contributed ‘a lot’.

Overall, 72% of people visiting the four regions took an interest in local foods during their visit. The vast majority of these people are not actively seeking out local foods but are happy to try them when they come across them. They are positively disposed to local produce, but need to be given the opportunity to sample it. This emphasises the need to provide people with the opportunities for good distribution and labelling to maximise the visibility of the product.

In order to understand and better describe the current market we divided respondents into 5 groups.

Food tourists (6-8% of UK holiday takers and visitors),

Seeking local food and drink is a particular reason for choosing their holiday destination. These people may choose destinations in order to have an opportunity of experiencing good food. (Many of them are more sophisticated in their knowledge and perceptions of foods but may not necessarily place particular emphasis on local foods. The results show they are more interested in ‘good food’ and ‘good restaurants’.)

Interested Purchasers (30-33% of UK holiday takers and visitors)

This group believes that food in general can contribute to their enjoyment of their holiday and they are purchasing and/or eating local foods when the opportunity arises. These people, though they are not preplanning, are often the most active purchasers of local foods.

Un-reached (15-17% of UK holiday takers and visitors)

This group believe that food and drink in general can contribute to their enjoyment of their holiday, and say that they are happy to try local food if they come across it, but at present they are not purchasing local foods.

Un-engaged (22-24% of UK holiday takers and visitors)

These people do not perceive food and drink as adding to the enjoyment of their holiday, but they are not negative towards sampling local foods.

Laggards (28-17%% of UK holiday takers and visitors)
Say they have no interest in local food, and are unlikely to have purchased any during their holiday.

The Food Tourist group is significantly smaller among those coming from abroad at under 3%, but higher, at 11%, amongst day visitors.

Values Associated with Local Food and Drink

There is a widely held perception that purchase of local foods helps the local economy (82%), and that purchase of local produce helps the local environment (65%). Additionally, 67% of holidaymakers say that they are prepared to pay more for quality food and drink.

The research implies that the more committed market groups place a premium value on local foods. However, we do not have evidence of what this premium is worth in monetary terms. Further work will be required to identify how this premium is structured, and to what attributes of local food it attaches. For example, complicating factors such as the difference between gift purchase and on the spot consumption need to be considered.

26% of people express a strong interest in seeing restaurant menus that identifies food that has been locally produced.

Image of Local foods.

Much of the research demonstrates that the majority of visitors make little distinction between 'local produce' and 'local specialities'. This is probably because their definition is largely driven by geography and place, rather than an understanding of the uniqueness of the product, or its production process.

However, there is evidence that at the more committed end of the market customers do make some distinctions, positively discriminating specialities from local produce as 'distinctive' and to a lesser extent 'tastier'. They are more likely to identify local produce with images of 'personal versus mass produced' and 'healthier'.

Amongst all holidaymakers, 'freshness', 'personal versus mass produced', and 'better for the environment' are the most positive images.

Tourists Purchase of Local Foods

Between 32% and 66% of tourists either purchase or eat local foods during their visit. The proportion is strongly related to their length of stay. This confirms that opportunity is a key driver of purchase behaviour.

Shopping

39% of tourists make at least one purchase of local foods during their visit. The majority of these purchases respondents identified as 'local produce' rather than local specialities. However, it should be borne in mind that although the definitions were made clear to them, for many their perception of speciality is vague. 17% of purchases included items bought as gifts.

Eating Out

The most popular venues for eating out are:

- pubs (64%)
- tea rooms (43%)
- café and snack bars (32%)
- fish and chip shops (31%)

There are strong contrasts in the choice of venue by age.

Analysing the choice of venue by the hall test market groups shows that a range of venues are selected by all groups. Pubs and fish and chip shops are consistently popular. Tea rooms are popular among all but the 'Laggards' group, who along with the 'Food Interested' (Hall test equivalent of 'Unreached' and 'Un-engaged') place more emphasis on cafes/ snack bars and other restaurants. Food Tourists and the 'Food Interested' have more interest in upmarket restaurants, foreign food restaurants and gourmet restaurants.

35% of holidaymakers had chosen local foods at least once when having a meal out. When asked for the reasons why they had not chosen local foods when eating out or making a purchase,

- 30% had not eaten out
- 23% had not shopped
- 19% said they just did what was easiest
- 18% had not seen any local foods, and
- 18% said they were unaware of local produce.

This demonstrates the dominance of; lack of awareness, lack of motivation, and lack of opportunity amongst these groups.

What Defines a Quality Meal Out

Most holidaymakers decide where to eat on the spur of the moment. These ad hoc decisions account for 60% of their choices. Other influences include, choosing a particular type of place (20%), recommendations (18%), decisions taken before the holiday or visit (14%), and attraction to restaurants advertising local foods/ specialities (13%).

Analysing the methods chosen by each market group shows that all groups are largely spontaneous in their choice. However, the Interested Purchasers are the group most likely to be attracted to restaurants advertising local foods and specialities. The Laggards and potentially interested are most likely to stick to brands they know.

Of the 14% who had taken decisions on where to eat before their visit, the dominant group travel with their partners, stay in hotel or bed and breakfast accommodation and many eat out at gourmet or quality restaurants. Some of this group pre book for security, relying on the accommodation provider for meals, but a larger proportion as seek quality meal experiences. However, amongst this group, quality does not necessarily mean local, since a high proportion, (44%), choose to eat out at 'gourmet' restaurants.

Overall, 11.1% of hall respondents only eat out for leisure, 17% for convenience only and 44% for a combination of these reasons. 20% only stick to 'what they like'.

Holidaymakers prioritise 5 factors that contribute towards making a good meal our a excellent experience:

- the quality of service (59%),
- the way the food is presented (55%),
- the way things are cooked (52%),
- the use of fresh ingredients (46%) and,
- the quality of the ingredients (43%).

The selection of these issues shows that there is a strong focus on the quality of the meal itself in defining a good experience. The prioritisation of fresh and quality ingredients offers an important opportunity to promote the value of local foods.

Those who express an interest in local food carry this forward to their definition of an excellent experience. 69% of this group prioritise local food and drink, and 60% the use of fresh ingredients. Food tourists place greater relative emphasis on the quality of service, the presentation of the food, and the quality of the cooking.

Comparing convenience diners to leisure diners, leisure diners place far more emphasis on the quality of service, the décor, choosing a local speciality, and reputation. Convenience diners are more influenced by the way the food is presented and the size of the portions.

Contribution of Local Foods to the Dining Experience

There is an extremely widespread perception that the use of local food and drink is essential to securing the attributes of quality and taste, two of the fundamental factors identified as creating excellent eating experiences.

The Impact of Branding and Better Information on the Market

40% of tourists (from the hall tests) claim that they often notice local labels and branding of local foods when on holiday. Between 13 and 17% of tourists (from the hall tests) would strongly value more information on local foods both before and during their visit, and a brand or label identifying local produce and local specialities.

A similar proportion claim that branding and labelling would encourage them to purchase more local produce and to choose restaurants using local produce. 11% strongly believed that more information would make them more likely to visit the region.

Recommended Marketing Approaches

The most active purchasers of 'local foods' are the holidaymakers who do not pre-plan, but once on holiday are keen to try out local foods and specialities. This group does not distinguish between local and speciality, and may in fact have a loose definition of what is 'local', which will encompass more than the local produce and local specialities that are the focus of this research. However, the research has demonstrated that this group is strongly motivated to experience local foods and meals. This interest is carried through to their choice of venue when eating out, and their definition of the factors that turn a good meal into an excellent experience.

Marketing in advance of the visit is most likely to be of interest to those motivated to consider local foods when they are choosing their destination, the food tourists, and to a lesser extent the ‘interested purchasers’. Food tourists are looking for quality of service, presentation and cooking, but are also attracted by local specialities. Local food needs to be delivering a high quality experience. The food tourists do recognise that local specialities add to the taste and distinctiveness of the meal and these qualities are attractive to them, but it is quality rather than novelty that they are seeking.

Once at their destination, a much wider audience is interested in finding opportunities to experience local foods. The target audience is mostly made up of the Interested Purchasers who are making quite spontaneous decisions. The aim must be to maximise the opportunities and encounters they have. There is widespread recognition amongst many tourists that fresh local produce and local specialities can contribute to the quality of their meals and to the enjoyment of their holidays. Many will make use of product labelling, branding, and menu information. However, the promotion of this information needs to remain fun and in tune with the spontaneous nature of holidaymakers decisions about where to eat and what to buy.

There are many of positive images and links to build upon. Local produce is associated with images of freshness, and personal rather than mass-produced processes. These qualities link well with rural tourist themes of; rest, relaxation, good scenery and discovery.

There is also a strong link between meal quality and the use of local produce or preparation of local specialities. This gives serviced outlets an excellent basis for the promotion of ‘local options’ on their menus.

Marketing messages need to reinforce the images and motivations of current purchasers and widen the appeal to those that are currently food tourists and un-engaged. General motivational messages should include references reinforcing the value of local production to the local economy and local environment.

The client will need to carefully balance the costs and logistical problems of branding against the benefits that might be achieved. Local labelling may be as effective at this stage and much simpler to achieve.

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Context for the Research

Current Knowledge and Practice

Introduction

Our aim in conducting the literature review was to understand and clarify the issues surrounding the role of local food and drink in relation to the tourist industry. This understanding would then inform our interpretation of the results of the primary research. The remit of such a review is potentially enormous, so we needed to focus our review on materials related to practical projects or academic research directly related to food and drink and tourism. Following discussions with the Countryside Agency, MAFF and Food from Britain, we decided to focus on the following types of contacts to locate such materials:

- The Regional Speciality Food Groups
- National organisations who work in the area of food and drink (e.g. FRA, FRCA, DETR)[1]
- Tourist boards
- Academic bodies and institutions
- Businesses (e.g. hotel chains, national and local food and drink companies)

We have discovered that, at the current time, there is limited literature available directly related to the role of local food and drink in tourism. The information that we received fell into the following categories:

- Marketing group literature from the regional food groups and tourist boards
- Some academic papers on the role of food and drink in tourism in Europe
- Conversations concerning the issues involved and personal experiences in food and drink promotion
- Links to a range of organisations involved in the promotion of local food and drink

The information that we have so far been unable to locate is:

- Evaluations of promotional activity
- Primary research focusing on the interaction of local food and drink and the tourist industry

However, from our discussions with our contacts it is clear that evaluations concerning the impact of promotional schemes either are in progress or planned by many food groups. There is also an indication that primary research into the links between local food and tourism is now starting to take place (e.g. the work of the Heart of England Tourist Board).

[1] FRA (Farm Retail Association) , FRCA (Farming and Rural Conservation Agency), DETR (Department of Environment Transport and the Regions)

Summary of findings

Definition

- There is no single universally agreed or adopted definition of local food and drink. Consumers often have a very vague view of what local means, and the increasing availability of 'regional' products adds to this lack of clarity. In addition, local promotional groups are regionally based and, as such, they often more a sum of their parts rather than a systematic representation of the distinctive produce of the area. Even government policy uses different definitions for different schemes. This makes it difficult to focus on exactly what local food means.

  For the purposes of our primary research amongst tourists, we have adopted the following definitions. By local food we mean,

  > *'...food and drink that is produced or grown in the local area or local speciality food that has a local identity'.*

  This definition would include fresh 'farm gate' sales, regionally branded and locally produced products, and local speciality products, cheeses, meat pies etc., that are in some way distinctive to the area or unique.

- However, it is important to bear in mind that consumer perceptions and regional images often conflict with, or work against, attempts to define and promote regional produce. Consumers' perceptions are linked more often to geographical knowledge and personal experience than any awareness of the criteria of designation.

Promotion

- Differing definitions of regional and local produce lead to differing objectives for schemes that seek to promote and differentiate local and regional foods. All schemes tend to try to structure themselves around geophysical (e.g. soil type, geographical boundaries) and socio-cultural (e.g. recipes, processes, presentation) definitions.

- The three main methods for promoting regional food and drink are those focus on designation, marketing and rural development respectively, although none excludes the other approaches entirely. For example, EU accreditation under Protection of Food Names scheme aims to protect the interests of local businesses who produce distinctive regional foods.

- Thus, the content of promotional schemes focuses on; marketing local produce, and / or supporting sustainable rural economies and environments, and / or ensuring product quality through training (e.g. of chefs) and product integrity though accreditation or designation.

Links to Tourism

- Few promotional schemes related to local and regional food and drink directly target the tourism market. There is a tendency for local suppliers to focus on product quality, aimed at 'discerning' purchasers, rather than raising interest in local foods, or making local foods accessible to visitors as part of their wider holiday experience. From their perspective, this may be the right approach to maximise their return from their limited volumes.

- Promotional food trails do link in with tourism, although these tend to focus on locations of suppliers rather than enhancing people's holidays by promoting opportunities to 'experience' local food and drink. However, the Heart of England tourist board is currently seeking to develop the distinctiveness of the Heart of England as a tourist destination through its food and drink culture by means of a three-year development project entitled Food & Drink 21. This project aims to foster partnerships between food producers, promoters and the tourism industry through use of local sourcing. Its planned outputs include case studies and examples of best practice.

Food, Drink and Tourists' Experience

- In some countries, stronger links have developed between food, drink and cultural tourism. In France, Italy and Scotland, visitors closely integrate food and drink with the wider tourist experience in their minds. In other countries of regions, tourists have little understanding and recognition of this element of the regions culture. Concerted marketing efforts will be required to alter perceptions and influence consumer attitudes.

- Local food and drink can play a variety of roles in visitors' holiday experience. The impact of local food can range from 'gastro-tourism', where people visit a region purely to experience regional food and drink, to the simple satisfaction of the physical need to eat and drink

- Several sources have indicated that local food groups do not currently target the tourist market. They are selling quality produce to those seeking distinctive or quality experiences. This suggests 'speciality' possibly at premium prices. Most tourists are looking for 'fun experiences' but not necessarily wishing to pay premium prices for them

Other Research

- We have found very little academic or other research into the links between regional food and drink and the needs and expectations of visitors whilst on holiday.

- Our desk research revealed that many sources believe that regional food suppliers and restaurateurs are supply led rather than marketing led. They focus on selling produce and 'adding value' rather than investigating and meeting consumer needs.

- The consensus has been that people are aware of a range of activities related to the promotion and marketing regional foods, but that there has so far been limited evaluation of the effectiveness of these activities and initiatives.

Projects and Initiatives

English Regional Speciality Food Groups

There are 9 Regional Speciality Food Groups in England. These are:

1. Kentish Fare
2. North West Fine Foods
3. A Taste of the South East
4. Middle England Fine Foods
5. Taste of the West
6. Tastes of Anglia
7. Hampshire Fare
8. Yorkshire Pantry
9. Heart of England Fine Foods

The groups are all independent organisations set up by mutual guarantee and derive their support from an number of organisations, including Food from Britain, at national level. The groups are membership organisations providing a range of business development and marketing services to producers. In addition, membership also comprises; local outlets, restaurants and food service companies and service providers such as design and packaging companies.

Beyond their general remit, the regional speciality food groups also carry out individual activities depending on their local context, and are supported by other local and national partner organisations (such as local tourist boards and the NFU). For example, A Taste of the South East, and A Taste of the West produce newsletters for their members highlighting regional and national news affecting their industry. Tastes of Anglia set up a 'Local Food into Local Shops' initiative, whilst Taste of the West produces an annual guide to 'Quality Food and Drink'.

The regional speciality food groups' direct links with the tourism industry are limited. Clearly, as part of the groups' remit, promotion and marketing is aimed at tourists as well as local buyers. The 'food trails' best evidence this tourist focus. All the groups produce food trails. These initiatives map member organisations in parts of their region and are available in Tourist Information Centres. Additionally, in 1989 A Taste of the South East also produced a book promoting Sussex produce, recipes, places of interest and environmental beauty. Heart of England Fine Foods and Middle England Fine Foods are very involved in the Heart of England Tourist Board's food tourism project.

We have not received any information regarding any evaluation research relating to these schemes. However, the groups do conduct their own research, for example work currently being carried out by Taste of the West looking into the benefits of using a regional brand for South West food and drink, which will report in 2001. Hampshire Fare is also currently carrying an evaluation of the effectiveness its activities through a survey of local business.

Other promotional projects and initiatives

A Taste of Scotland

The Taste of Scotland scheme identifies eating establishments 'who use fresh local produce to create the kind of quality menus, textures and flavours that diners are unlikely to find anywhere else in the world.' The scheme focuses on the link between catering industry and Scottish identity. Its annual guide covers a range of different types of establishment from tea-rooms to gourmet restaurants. Included establishments are rated on their hospitality, cooking, food presentation and food quality. It seeks to elicit comments from visitors and highlights the Macallan awards for eating establishments. The guide does not cover establishments that choose not to enter the scheme.

Other national schemes are:

A Taste of Ulster
A Taste of Wales

The Countryside Agency - Eat the View: Promoting sustainable, local produce

This project aims to facilitate links between producers, suppliers and consumers to promote the sale of local produce that supports the sustainability of the local landscape and socio-economy. The work is a natural extension of the 1998 'Countryside Product Programme' by the then Countryside Commission, which sought to identify products or schemes to support based on their contribution to sustainability.

It seeks to highlight sustainable farming practices (i.e. that use environmentally sensitive techniques) and help consumers, be they local people of visitors, to connect the local landscape with the foods they eat. It aims to take advantage of current opportunities for developing sustainable environmentally sensitive markets, through the rise in consumer interest in organic food and food safety, and government policies and financial incentives for initiatives that support the goal of sustainability.

The project addresses the current lack of marketing co-ordination between local producers on marketing and labelling, and aims to facilitate partnerships between producers and co-ordinate links with supplier and retailers. Given the remit of the Countryside Agency, there is a greater emphasis on the effect on the physical environment than other initiatives. In contrast with the work of food groups, it does not focus on stimulating consumer demand, and the attractiveness and 'quality' of the product, but places local produce in the context of the local landscape and economy.

Examples Of Other Relevant Schemes

Business led schemes	
DACOM – Devon and Cornwall Overseas Marketing	Promotes counties and the benefits of local food and drink overseas
Natural Cooking for Scotland by the Moffat Centre, Glasgow Caledonian University	Seven day operational course for food providers to encourage use of fresh, local produce.
Food from Northumberland	Clustering/marketing exercise
Cartwheel	Farm tourism project
Tourist Board schemes	
'Welcome farmers' by the South East Tourist Board	Provides training for farmers in marketing their products
Protected Areas schemes	
Gifts from Northumberland	Local produce scheme co-ordinated by Northumberland National Park
Made in the High Weald	Guide to food and drink and other products made in the High Weald AONB. Primarily aimed at developing local supply chains
Hotel Industry schemes	
'Britisseries' by Hilton Hotels	The Hilton Group have opened 5-10 'Britisseries' throughout the UK, with plans to open another 20. They aim to use local produce in menus on a regional basis.
A Taste of Britain 2000 campaign by Heritage Hotels	'Taste of Britain' festival - March to August 2000. Series of month long events designed to celebrate British culinary heritage.

Introduction to Research Findings

Introduction

The primary research consisted of three surveys:

- **A national face to face in home survey** of 1600 English residents. This provided a robust national view of holidaymakers' current awareness and interest in regional foods while on holiday and the values associated with local and regional food and drink.
- 1200 **visitor interviews in four study regions**. This captured information on current use of local foods and awareness of local products available in each region. (The regions included in the research were: Cumbria, Heart of England, South West and Yorkshire.)
- A series of **hall tests** with 240 holidaymakers (who ate out or bought meals from their accommodation providers), to establish their patterns of eating out and what they are looking for from a meal out. This allowed us to identify which elements of the event contribute to an 'excellent experience', and how local food and drink can be used to meet these expectations. (Hall tests were carried out in Heart of England and Cumbria regions.)

In reporting and interpreting the results we need to bear in mind the different sets of people these three surveys relate to. The omnibus survey asks questions of English residents who have taken any holiday (in UK or abroad) over the last three years or made a day visits outside their region in the last year. The visitor survey included holidaymakers and day visitors visiting one of four tourist regions in England; (Cumbria, Yorkshire, Heart of England and the South West). This survey included visitors from other parts of the UK and abroad in addition to English residents, there was no requirement to have been interested in or sampled local food. The hall test recruited people in Cumbria and the Heart of England who had eaten out during their present holiday or visit.

We have reported the results from these three surveys as they inform the particular issues we cover in the research. It should be borne in mind when reading the report that:

- overall the hall test respondents are more likely to be interested in eating out than either of the other two samples, and
- a proportion of the omnibus respondents have not taken any holidays or made day visits in the UK recently.

In each survey, we drew people's attention to what we meant by locally produced food and drink and speciality food. We defined these terms as follows:

> *"food or drink that is produced or grown in the local area (e.g. local fish, vegetables, water), or local speciality food that has a local identity (e.g. local cheese or beer)."*

However, it is our view that in many cases respondents have not made a clear distinction between locally produced and speciality food and drink. These definitions use a more sophisticated distinction than that used by most holidaymakers, who categorise all local foods into a single group distinguished from other products by their 'local' label regardless of how 'special' the product is.

Current Interest local foods While on Holiday.

Contribution of Food and Drink in General to Holiday Experiences (Hall12, Visitor19[2])

If we are seeking to promote holidaymakers' purchase of local foods, we need to understand the role food and drink plays in people's overall holiday experience. For some, it will be purely functional while for others it will be an important element of their overall holiday experience.

As a context for understanding attitudes to local food a drink, respondents to the visitor on-street survey and to the hall tests, were asked the extent to which they felt food and drink in general had contributed to their enjoyment of their holiday.

The hall test recruited visitors who had eaten out during their holiday, and 51% of them said that food and drink had contributed a lot to their holiday/ visit. Only 5% claimed that food and drink had added nothing to their experience.

In the visitor survey, 39% said that food and drink had contributed a lot to their holiday/ visit and 24% of people said that food and drink had contributed nothing. This variation is explained by differences in the sample base. A significant proportion of the visitor sample (24%) had not eaten out at all during their visit.

Clearly, people's attitudes towards food in general will have a significant effect on their perception of and valuation of local foods. Taking those that perceive food in general adds 'a lot' or at least 'some' enjoyment to their holiday we can say that between 61-69% of UK holidaymakers a positively disposed to wards the contribution food can make to their holidays.

Interest in Local and Speciality Food

Numbers interested in Local Foods (Omnibus 6 and Visitor 11)

Overall, 72% of people claim to have taken an interest in local food and drink on their most recent holiday or day out in England. The vast majority of these people are not actively seeking out local foods, but are happy to try then if they come across them.

In order to understand and better describe the current market we have divided respondents into 5 groups. We will describe these groups in more detail as we report the results of the survey but we have briefly described them below.

Food tourists (6-8% of UK holiday takers and visitors),

Seeking local food and drink is a particular reason for choosing their holiday destination. These people may choose destinations in order to have an opportunity of experiencing good food. (Many are more sophisticated in their knowledge and perceptions of foods but they may not necessarily place particular emphasis on

[2] The numbers in brackets refer to question numbers from the various surveys and can be cross-referenced to the questionnaires contained in Appendix A

local foods. The later results show they are more interested in 'good food' and good restaurants.)

There are a large number of people who place less emphasis on food and do not choose their destination on this basis, but are happy to 'try local food if they come across it'. We have further sub divided these people into three groups based on their current activities and their view of the role food and drink may play in their holiday experiences.

Interested Purchasers (30-33% of UK holiday takers and visitors)
This group believes that food in general can contribute to their enjoyment of their holiday and they are purchasing and/or eating local foods. These people, though they are not preplanning, are often the most active purchasers of local foods.

Un-reached (15-17% of UK holiday takers and visitors)
This group believes that food and drink in general can contribute to their enjoyment of their holiday, are happy to try local food if they come across it, but they are not currently purchasing local foods.

Un-engaged (22-24% of UK holiday takers and visitors)
These people do not perceive food and drink as adding to the enjoyment of their holiday, but they are not negative towards sampling local foods.

Finally, another group claims to have no interest in local food and drink.

Laggards (28-17%% of UK holiday takers and visitors)
Say they have no interest in local food, and are unlikely to have purchased any during their holiday.

When people were asked the same question when on holiday or visiting an area more of them said that they have an interest in sampling local food, and far fewer people (only 17%) said that they had no interest. It appears that the four regions in which the visitor surveys were conducted either attract or promote more interest in local food, or being on holiday encourages a more positive attitude.

The Food Tourist group is significantly under-represented among those coming from abroad at under 3%, but higher at 11% among day visitors.

In the hall tests we do not have quite the same information and are therefore unable to reproduce identical market groups. For the purpose of the analysis, we have constructed a classification in four groups based on their attitudes to the role of food in general and local foods when eating out eating out.

- Food Tourists (18%) are those who claimed that the quality of the food and drink in the area was a factor in their choice of destination. (This group is larger than the visitor survey because we only recruited respondents to the hall test if they had eaten out.)
- Local Food Interested (24%) whose actions and attitudes suggest interest in 'local foods'.
- Food Interested (46%) recognise the contribution of food and drink in general but show no particular interest in local food (approximately equivalent to un-reached / un-engaged).
- Laggards (12.3%) who provide no evidence of any particular interest in food and drink

Whilst these groups may be broadly similar in outlook to the market groups identified in the visitor and omnibus surveys they are not directly comparable.

Type of Local Foods People are Interested in (Omnibus 7, Visitor 12)

Of those people who express some interest in local foods, the majority of respondents are interested in both locally produced and local speciality foods. A minority of respondents from the on-street visitor survey did make a distinction. 18% said they are only interested in local produce and 18% said they are only interested in speciality food, (the same figures for omnibus respondents are 21 and 7%). (It should always be borne in mind that we believe that not all respondents clearly distinguish what is meant by the definitions.)

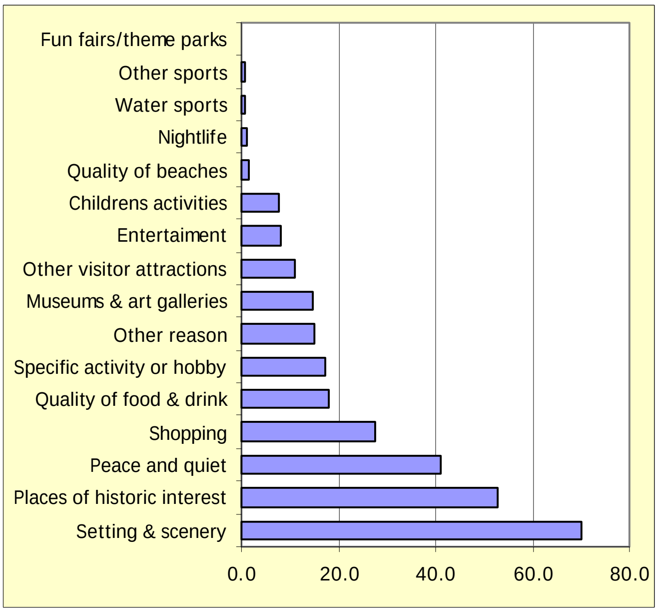
There are also slight differences by socio-economic group, below we note the greatest departures from the all respondent averages:

- More 16-34 year olds are interested in specialty foods.
- More of those over 65 are interested in local produce.
- More younger people (under 24) and men are interested in local and specialty drinks.
- More older people (45+) and women are interested in local and specialty foods.

The Role of Food in Choosing a Holiday Destination (Hall 11)

Our sample of hall test respondents, (who were selected because they had eaten meals provided by their accommodation providers or by a restaurant), were asked what motivated their choice of this destination for their holiday. Overall, 18% of respondents said the quality of the food and drink in the area was a key factor in their choice of destination. The quality of the local food and drink in the area was a important factor for more hall test respondents coming from other parts of the UK (26%) and for fewer people (11%) coming from abroad. This is despite the generally small numbers of visitors identified in the visitor survey as food tourists. It perhaps reflects the fact that the hall test was designed to select people who have eaten out and are more interested in food.

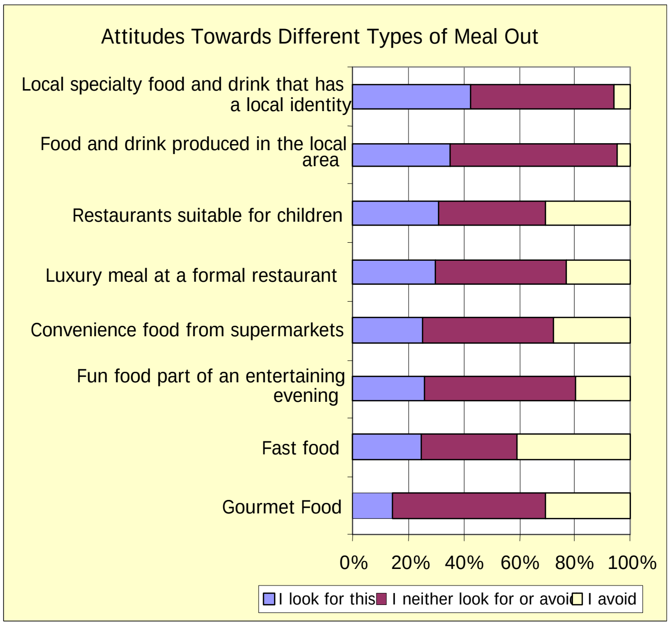
Fig 1 Key Factors in destination Choice



Attitudes to Different Types of Food and Restaurant Outlet While on Holiday (Omni 9)

In the national omnibus survey, recent holidaymakers were asked about their attitudes towards different kinds of restaurant and produce. There is a generally positive reaction to local foods. 42% claim that they actively look for local specialities with a 'local identity' and 34% look for local produce. In contrast, holidaymakers most often avoided convenience foods. Fast food is the category avoided by the largest number of people (40%) and 27% avoid convenience supermarket food.

Fig 2 Food Experiences looked for While on Holiday



Values Associated with Local Food and Drink

General Attitudes (Omnibus 8)

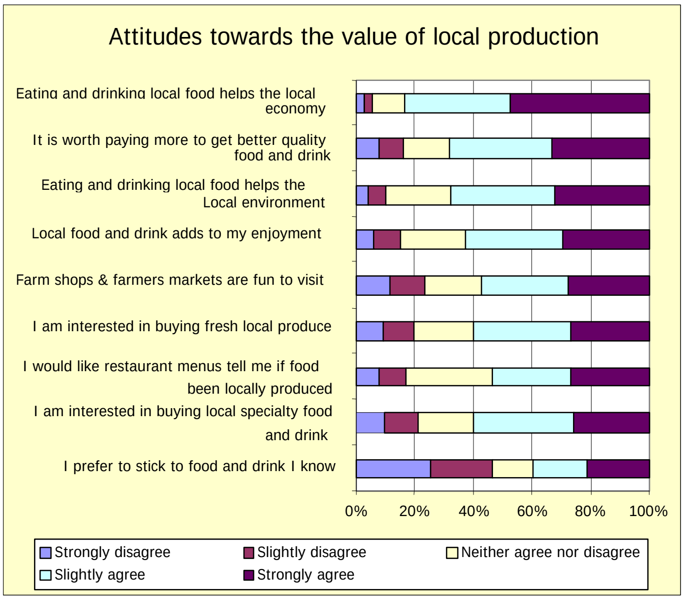
To gain an understanding of the kinds of attitudes that currently exist in relation to local food and drink, we asked the national sample of recent holidaymakers for their views about local food and drink whilst on holiday or a day out.

There is a widely held perception that purchase of local foods helps the local economy (82%), and that purchase of local produce helps the local environment (65%). Additionally, 67% of holidaymakers say that they are prepared to pay more for quality food and drink, and a high number (61%) agreed that local food and drink added to their enjoyment of a visit.

Later in the research, we demonstrate that the more committed market groups do place a premium value of local food and drink. However, we do not have evidence of what this premium is worth in monetary terms. Further work will be required to identify how this premium is structured, and to what attributes of local food it attaches. For example, complicating factors such as the difference between gift purchase and on the spot consumption need to be considered.

There are also a large proportion of people (59%) who express some interest in purchasing locally produced and speciality food and drink whilst on holiday. This proportion ties in closely with the 51- 58% of people identified in the first three market groups in the national omnibus and visitor survey. 26% of people express a strong interest in purchasing local food and a similar number strongly wish to see restaurant menus including information that identifies options that have been based on local produce.

Figure 3 Attitudes Towards the Role and Value Local Foods



Perceptions of the Image and Quality of Local Produce (Hall 17,18)

When asked to compare local produce with other types of food and drink, hall test respondents rated local produce positively. On average local produce is rated 7.2 out of 10, with 15% of respondents scoring it 9 or 10. This indicates that local produce has a modest quality premium in many holidaymakers' eyes.

The image of local produce is most strongly associated with its freshness (6.1) and its 'personal' rather than 'mass-produced' image (5.8). There are also less strong associations towards; 'higher quality', 'better for the environment', 'more interesting', 'healthier' and 'tastier'.

On balance, people consider local produce to be 'traditional' rather than 'trendy'. This is probably reflects the association of local produce with craft production and more 'natural' farming practices, and a return to older methods and a rejection of 'modern' mass production practices.

Perceptions are more neutral on the 'distinctiveness' and 'safety' of local produce. In addition, holidaymakers were more likely to think that locally produced food and drink is traditional rather than trendy.

Perceptions of the Image and Value of Speciality Food (Hall 19,20)

Holidaymakers in general make little differentiation between local produce and speciality food. This is reflected in the very similar image held of speciality foods and locally produced foods.

The same two qualities; 'freshness and 'more personal' are most strongly associated with speciality foods. The lack of distinctiveness in the image is demonstrated by the fact that, amongst holidaymakers as a whole, speciality foods are no more strongly associated with 'distinctiveness' than local produce.

People were asked to value being able to choose or buy speciality produce. Overall, the value worth of speciality food is rated at an average score of 7.5, with 28% of respondents scoring it 9 or 10.

Analysis of both ratings by market group shows that there is a correlation between interest in local food and ratings of its value. The mean scores by a simplified set of market groups (available from the hall test research) are set out below.

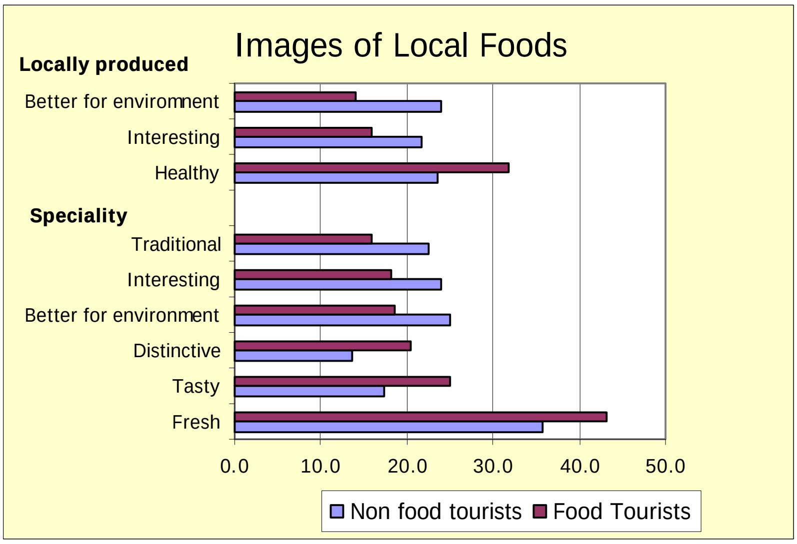
Group	Mean valuation of local produce compared to other food	Mean valuation of the benefit of being able to choose or buy speciality food
Food Tourists	7.6	7.8
Local Food Interested	7.5	7.8
Food Interested	7.0	7.3
Laggards	6.5	7.0

While the market as a whole does not differentiate between locally produced and local speciality, the Food Tourists are more discriminating. Comparing the perceptions of the total market and those of the food tourists, the figure shows that food tourists are more likely to associate 'healthiness' with local produce and taste, and distinctiveness with local specialities.

Non food tourists appear to be more likely to associate both local produce and speciality food with more general 'environmental benefits' and being 'more interesting' than other food options. This underlines that their purchase is not strongly motivated by an appreciation of the qualitative differences between local foods and other products.

These are relative not absolute differences but they clearly demonstrate that, in the most motivated section of the market, people are more likely to distinguish between local and speciality produce.

Figure 4 Images of Locally Produced and Local Speciality Foods



Tourists' Purchase of Local Foods.

We investigated the current pattern of holidaymakers' purchase and consumption of local foods, as part of the on street visitor survey. A series of questions investigated people's purchasing activities, opportunities and reasons for not purchasing local foods.

It should be borne in mind that all the figures for activity are an underestimate of actual activity rates as people are reporting what they have done to date on their holidays. There is a strong correlation between the time people had spent in the area and the likelihood of their purchasing or consuming local produce. This confirms the earlier statements that many holidaymakers are not specifically travelling to their destination to sample local foods but they are pleased to try them when the opportunity presents itself. The longer they stay the more opportunities that arise. 34% People who were on day visits had either eaten or purchased local foods, while 66% of people who had been in the are for over a week had done so.

Shopping

Which Outlets Selling Local Food and Drink Do Holidaymakers Visit? (Visit14)

52% of respondents said they had visited outlets selling local foods by the time they were interviewed. The percentage of holidaymakers that had visited any outlet by the time they were interviewed rose from 39.7% for day visitors to 66.4% for those that had been on holiday for over one week. The highest number had visited shops selling local produce (32%), with similar numbers visiting shops selling local specialities, local markets and delicatessens. There are fewer tourists and day visitors visiting farm shops or farmers markets (7-8%). We must be careful in assessing this result to remember that, despite the prompts respondents were given, they may still be using their own definitions of local foods.

Which Types of Local Foods were Purchased From Food Sales Outlets? (Visit15)

Around 39% of holidaymakers made at least one purchase of local foods whilst on their current visit (22.7% for day visitors to 60.7% for those on holiday for over a week). A majority of these purchases (32%) was of locally produced food. Speciality food was bought by 16% of holidaymakers. Fewer people bought drinks, only 12% locally produced drinks and 6% local speciality drinks. (Purchases from restaurants are covered in the next section).

Why was a purchase (any purchase) made? (Visit16)

Those holidaymakers who had purchased local food and drink were asked why they had done so. Almost half of all those who purchased local foods, said that they had done so because 'it was there'. This reinforces the view that opportunity is a key driver of activity. The more opportunity people have the more likely they will be to purchase local foods. 17% of purchasers said they had made their purchase as a gift.

The 'Local Food Interested purchasers' are the most likely to buy local foods because 'it was there'. The food tourists are more discriminating and more purposeful in their purchases.

Figure 5 Reasons for Purchase by Market Groups

(Un-reached make no purchases of local foods.)

Eating out

Type of Meal Chosen (Visitor13)

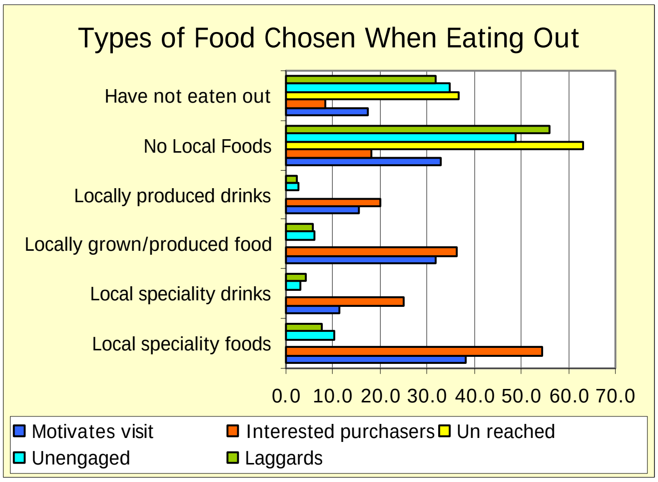
In the visitor survey, 76% of respondents had eaten out at all during their stay so far. There are surprisingly high activity rates amongst day visitors, 71% of whom had eaten out and 63% had made some use of 'convenience restaurants', whilst only one had chosen a special or gourmet restaurant. Food tourists on day visits had made more use of formal restaurants. The longer people stayed the greater the variety of venues they had used, though the patterns are quickly established, and do not vary greatly between those that had stayed only a few days and those that had stayed longer.

Types of Local Food and Drink Chosen When Eating Out (Visit17)

Around 35% of all holidaymakers had chosen local foods at least once when eating out on their current holiday, 41% had not chosen local foods and 24% of holidaymakers had not eaten out at all during their visit. (This varies between 23.9% for day visitors and 46.7% for those on holiday for over a week.

Bearing in mind the ambiguity over the differences between local produce and local specialities, more people interpreted their choice of a local option in a restaurant as a local speciality than simply local produce. This probably reflects the fact that the food has been prepared and served. When recording their purchasing activity, items are more often referred to as 'local produce' reflecting that many be will less processed before sale, i.e. more are simply local produce.

Figure 6 Types of Food and Drink Chosen When Eating Out



Reasons Why Local Food and Drink was not Chosen When Eating Out or Bought from Shops (Visit18)

Half of all holidaymakers claimed to have neither bought nor eaten local food and drink on their current visit. These people are predominantly found in the 'un-engaged' and 'Laggards' market groups.

When asked for their reasons for not taking advantage of the local food and drink in the area.

- 30% had not eaten out
- 23% had not shopped
- 19% said they did what was easiest
- 18% had not seen any local foods
- 18% said they were unaware of local produce

These reasons show the dominance of lack of awareness, lack of motivation, and lack of opportunity among these groups of people. Only 8% claimed that their lack of purchase was because they preferred to stick to things they know, and only 3% because local produce was too expensive.

What defines a ‘quality experience’ for convenience and leisure dinners on holiday.

To seek to understand what people are seeking when they eat out at serviced restaurants, hall test respondents (who were selected on the basis that they had eaten out) were asked about the types of food and types of places that they choose to visit. They were also asked to give their reasons why particular places are chosen and how the decision was made on this particular visit. We then explored with them what contributes to an excellent meal out, and the contribution that can be made by local foods.

Deciding Where to Eat (Hall13)

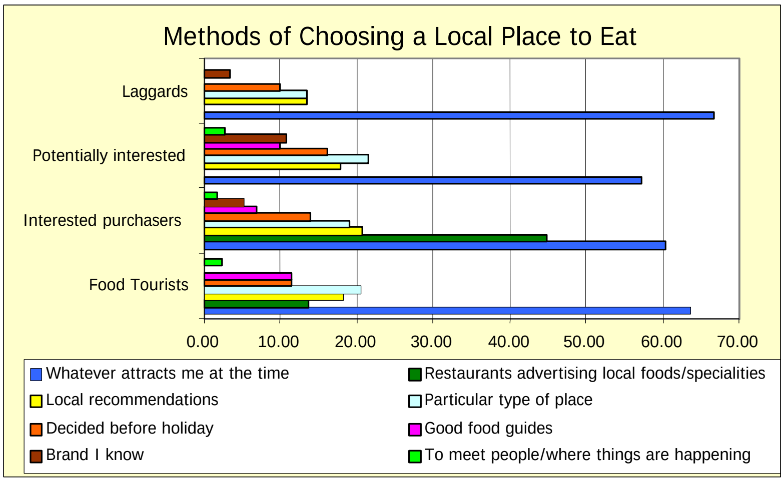
The main reason given by holidaymakers for choosing where to eat on their current holiday is that it is a spur of the moment decision (60%), based on whatever attracted them at the time and presumably wherever they find themselves. This is in marked contrast to other decisions taken about their holiday. Where to go, where to stay and what to do all tend to be much more planned choices and often strongly influenced by; prior research, recommendations and previous experience.

Recommendations are an important secondary influence mentioned by 20% of holidaymakers, people also tend to target ‘a particular type of place’ i.e. choosing the type of meal they want before selecting the specific venue. In addition, 13% of people stated that restaurants that were advertising local foods or specialities influenced their choice.

Analysing the methods chosen by each market group shows that all groups are largely spontaneous in their choice. However, the Interested Purchasers are the group most likely to be attracted to restaurants advertising local foods and specialities. The Laggards and potentially interested are most likely to stick to brands they know. Food Tourists and the potentially interested are the most likely to use good food guides.

Figure 7 Methods of Choosing a Place to Eat

(The groups in the hall test are approximations of the market segments identified in the visitor survey)



A small group of people (14%) had decided or booked before going on holiday. We have analysed this group further as they are a group that might be most interested in pre-visit information and promotions of local food.

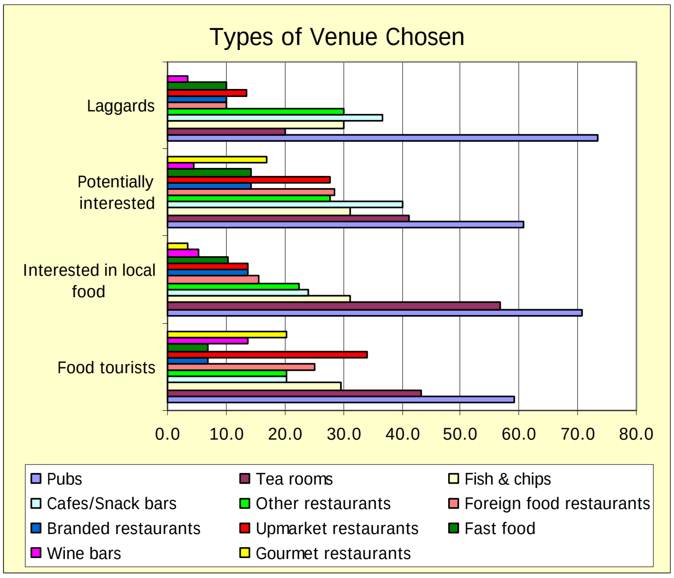
The numbers in this group are small so the figures should be treated with caution. However, they do appear to hang together as a clearly identifiable group, although they are not concentrated in any of the market segments we have related to local foods. The group does not hold a common interest in local food but is motivated by a more general interest in food. About 70% of these people are travelling with their partner only, and staying in bed and breakfast or hotel accommodation. A similar percentage rely on their accommodation provider for at least some of their meals. However, they are also very likely to be eating out (60%). Very high proportions of them, (44%) have chosen to eat out at gourmet restaurants.

Where People Eat Out on a Holiday / Day Out (Hall 14)

Whilst on holiday, the most popular place for eating out is a pub, chosen by nearly two thirds of holidaymakers. This is a common choice across all age groups, though the over 65s are less likely to choose a pub than younger groups. Other popular places are; tea rooms (43%) and cafés/snack bars (32%) and fish and chip shops (31%). Around one quarter of holidaymakers chose foreign and/ or and upmarket restaurants. Fast food is not a popular choice on holiday, and gourmet restaurants are also a minority option.

Analysing the choice of venue by the hall test market groups shows that a range of venues are selected by all groups. Pubs and fish and chip shops are consistently popular, tea rooms are popular among all but the 'Laggards' group who, along with the 'Potentially Interested', place more emphasis on cafes/ snack bars and other restaurants. Food Tourists, and the 'Potentially Interested' have more interest in upmarket, foreign food and gourmet restaurants.

Figure 8 Choice of Venue by Market Groups



There are also some clear preferences expressed by age.

- Younger people (under 35) are more likely to be attracted to fish and chips, foreign food and cafes / snack bars.

- 35-45 year olds are the most likely groups to be found in fast food and fish and chip restaurants (perhaps following their children's preferences).

- 45-55 year olds are the groups most likely to be found in wine bars and gourmet restaurants.

- 55-65 year olds are the most likely to favour upmarket restaurants.

- The 65+ age group are more likely than other groups to choose branded restaurants (eg Beefeaters), they also favour cafes / snack bars.

- Tea rooms have strong appeal for all groups other than the under 34s.

Why Particular Venues are Chosen (Hall15)

The principle reasons given for choosing particular types of meal venue are; 'because it is easy', 'its what I like' and a combination of other reasons lead by 'to experience local produce and specialities'.

We have also subdivided respondents by the reasons they had for eating out, in order to establish if leisure dinners have different priorities to convenience diners. Those who chose where to eat 'because it was easy' or was the 'children's choice' were classified as convenience eaters. Those who selected in order to 'experience something different', 'to have a good night out', to 'experience locally produced food and drink or local specialities' or 'to have a meal to remember', were defined as leisure eaters. If their only motivation was 'it's what I like' they were classified as sticking to what they know.

Overall, 11.1% of hall respondents were identified to have only eaten out for leisure, 17% for convenience only and 44% for a combination of these reasons. 20% only stuck to 'what they liked'.

Factors Contributing to an Excellent Dining Experience (Hall16)

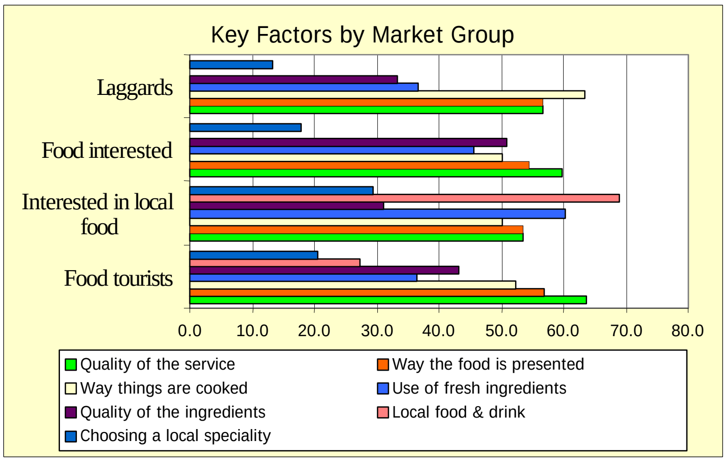
In order to explore the factors that most influence peoples' perceptions of a meal out we asked them to select the three factors that in their opinion are most likely to produce an excellent dining experience. The principle factors chosen were:

- the quality of service (59%),
- the way the food is presented (55%),
- the way things are cooked (52%),
- the use of fresh ingredients (46%) and,
- the quality of the ingredients (43%).

The selection of these issues shows that there is a strong focus on the quality of the meal itself in defining a good experience. Other factors such as atmosphere, entertainment, décor and table setting are much less important.

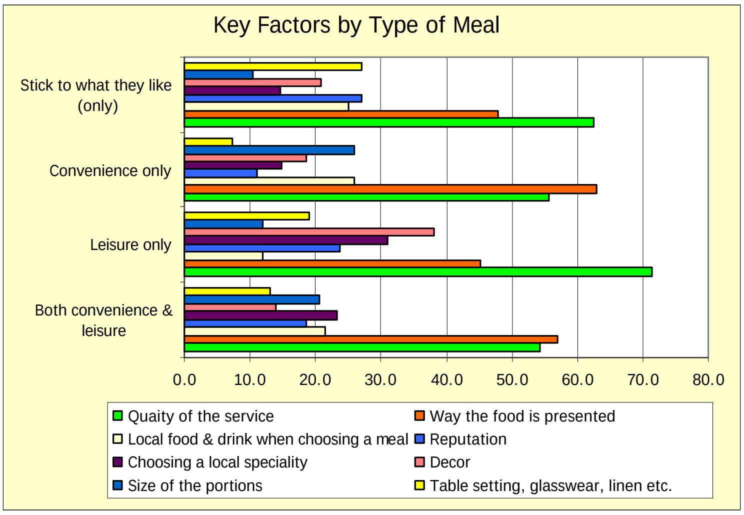
The prioritisation of fresh and quality ingredients provides an important opportunity to sell the value of local foods. Three options; the 'use of local food and drink', 'choosing local specialities' and 'choosing something different', were explicitly chosen by 21-23% of people. The use of organic ingredients was only rated as a key factor by 5% of holidaymakers.

Figure 9 Key factors in defining an excellent experience by market group



The figure shows that those who have expressed an interest in local food carry this forward to their definition of an excellent experience, 69% of them prioritised local food and drink and 60% the use of fresh ingredients. Food tourists place greater relative emphasis on the quality of service, the presentation of the food and the quality of the cooking.

Figure 10 Key factors in defining an excellent experience by meal type



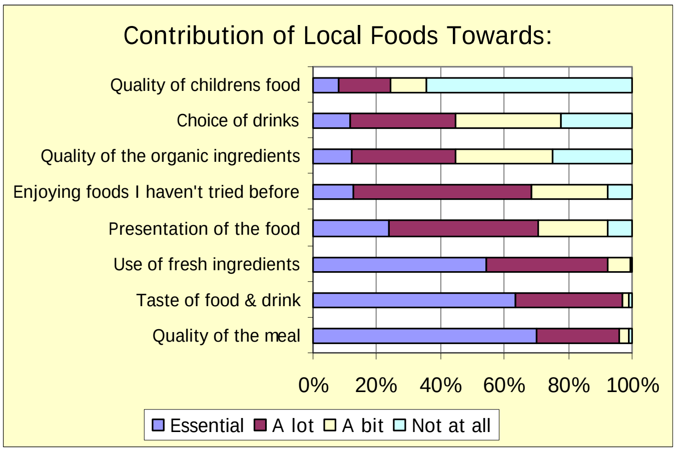
Comparing convenience diners to leisure diners, leisure diners place far more emphasis on the quality of service, the décor, choosing a local speciality and reputation. Convenience diners are more influenced by the way the food is presented and the size of the portions.

Contribution of Local Foods to the Dining Experience (Hall17)

Respondents were asked specifically the extent to which the use of local food and drink contributed to seven aspects of a meal. There was an extremely widespread perception that the use of local food and drink is essential to securing the attributes of quality and taste, two of the fundamental factors identified earlier as creating excellent eating experiences. Local foods are most likely to be seen as essential in contributing to:

- the quality of the meal (70%),
- the taste of the food and drink (64%),
- the use of fresh ingredients (55%), and
- the presentation of the food (24%)

Figure 11 The Contribution of Local Foods to the Dining Experience



The figure shows that there is no perceived relationship between 'local' and 'organic'. The two are clearly differentiated by respondents.

The Impact that Branding and Better Information may have on the Market

Awareness of Branding and Labelling (Hall22)

40% of holidaymakers claim to often notice local labels and branding of products that identifies their area of origin, and an additional 10% claim that they always notice of such information.

The Perceived Value of Labelling and Information, Prior to and During Holidays (Omn11)

In order to examine the interest in more information on, and branding of, local foods, the national sample were asked to consider four proposals detailed below. Opinion was evenly spread, many people showed little interest in any additional information or branding. However, between 13 and 17% strongly valued:

- more information on local food and drink before visit
- more information on local food and drink during visit
- brand labelling that clearly identifies locally produced food and drink
- brand labelling that clearly identifies locally specialities

The responses are to these four questions are highly correlated showing that respondents are basically responding to the provision of more information, rather than making a subtler distinction between the types of information on offer. However, differences do emerge when we look at the response by market group. The Food Tourists are very much more interested in information than other groups, and 25% would strongly value more information and 35% would strongly value brand labelling. There are also age differences and socio-economic differences. Interest in more information and branding and labelling grows with age and is most common among A/Bs, (though this latter difference is not great).

The Impact of Branding and Labelling (Omn12)

A similar proportion of respondents nationally, 15-16% strongly believe that branding restaurants that use local produce and the labelling of local produce in retail outlets would encourage them to make more purchases.

A significant proportion of people, (11%) also believes that the provision of more information on local food and drink would make them more likely to visit a region. (It should be borne in mind that only 6% these same respondents claim that food currently plays any part in their choice of destination.)

The responses to these three questions are also correlated, and there is a similar contrast between the food groups. 37-35% of food tourists believe that they would make more purchases and eat more in restaurants offering local foods if there were more branding or labelling. 25% of this group also strongly believe would influence their choice of destination.

The Regional Picture

The visitor survey was undertaken in 4 regions. People were sampled on the street on an 'nth' passer by basis. We are also able to analyse the results by region of origin.

We set a minimum overall quota of 20% for non-English tourists to ensure that we had sufficient people to analyse in this sub group. Overseas visitors visited all four regions, although a majority were visiting the Heart of England.

The profiles of visitors surveyed in each region vary significantly. Overall, 28% of respondents were day visitors. However, the vast majority of day visitors were interviewed in the Heart of England or Yorkshire. Very few day visitor were visiting Cumbria or the South West. In fact 55% of visitors to the Heart of England were day visitors and 45% of people visiting Yorkshire, compared with only 5% and 11% in Cumbria and the South West. In the South West, 70% of people were visiting for 4-7 or 8-14 days, and in Cumbria 79% visiting 2-7 days. However, length stay does not significantly affect experience of food and drink.

Responses are more related to the attitudes of the visitors themselves regardless of their length of stay. More visitors are interested in local produce than speciality produce in every region. This trend is most marked in the South West and Cumbria.

To profile the four areas used in the visitor survey:

South West:

Our sample of visitors to the South West tended to be staying for over a week, either in hotels or camping with their family. They are motivated by and interested in local food and drink, although opportunity and awareness limit their activity many will buy when they can.

Cumbria:

People who visit Cumbria are less likely to be interested in local foods. They tend to visit for short breaks (2-3 days), and they make limited use of restaurants, which is reflected in their lack of interest in speciality food. However, they do buy local foods, although when they do so it because it is available and the easiest option rather than because of a desire to experience local food and drink.

Figure 12 Interest in Local Foods by Holiday Region

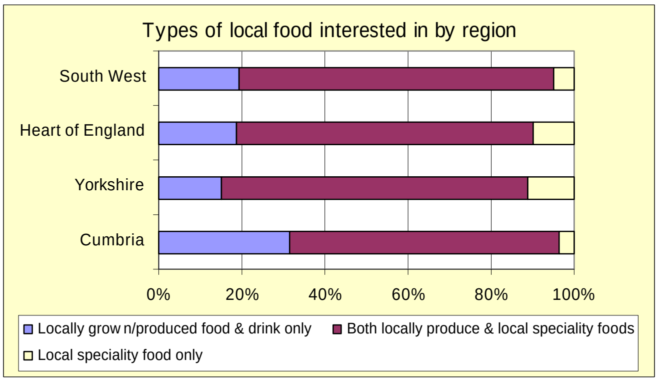
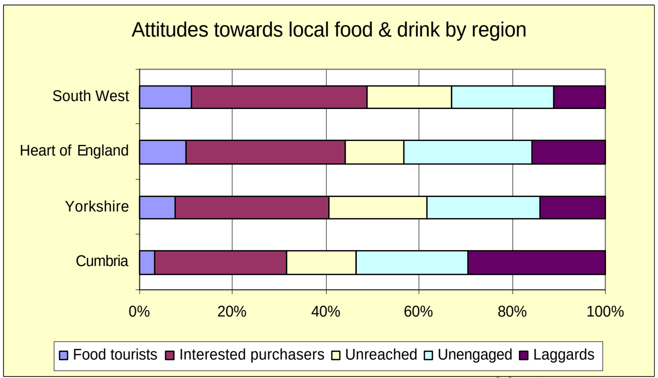


Figure 13 Attitude Towards Local Foods by Holiday Region



Yorkshire:

Visitors to Yorkshire are day visitors or people staying for around a week. They are interested in local foods, but many have not shopped or eaten out during their stay or are simply unaware of the options. They tend to be older visitors, who are not motivated by experiencing local food and drink on their visit.

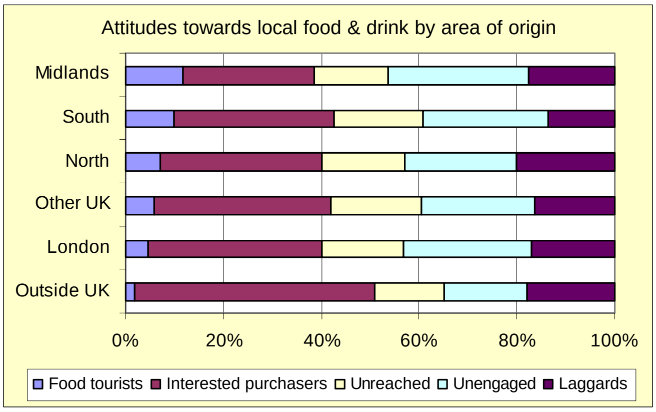
Heart of England:

People visiting the Heart of England are also likely be day visitors or staying for a week. They are likely to be interested in and purchase local foods either when shopping or eating out in a restaurant. Those who do not purchase tend to be those who are prefer to stick to what they know.

Origin of Tourists

Region of origin has a limited impact on attitudes and behaviour regarding local foods. Attitudes are more related to where they are going to than where they come from. This may be a reflection of the types of people choosing each destination.

Figure 14 Attitude Towards Local Foods by Origin Region



It is true to say that those from the South of England are more likely to purchase local foods and eat out. Visitors from the North and people from other parts of the UK tend to be older, and have less interest in local foods. They are also less likely to shop or eat out in restaurants and are thus less likely to come across local foods. People from Midlands tend to be visiting the Midlands or on holiday in the South West, and are highly interested in local foods, and wish to experience these opportunities during their visit.

Overseas visitors are interested in local foods although it has not been the reason they came to England. A large proportion claim to purchase local foods and to do so because they want to experience local foods whilst on a visit, and choose local options when eating out (especially local specialities). Those who are not taking advantage of local foods claim they are unaware of local options.

Marketing of Local Foods to Tourists and Restaurateurs

The Perceived Value of Local Foods

The research has clearly demonstrated that there is a widespread interest and readiness to try local foods while on holiday or on a day visit. While at present only a small fraction of tourists are motivated to visit by food, many are happy to try local foods once in the locality and perceive that these opportunities add to their enjoyment of their holiday.

The research has produced some very positive findings. It has demonstrated:

- That there is a significant tourist market for local foods and meals based on local ingredients.

- That the; cooking, the freshness and the quality of ingredients are key factors that create excellent meal experiences for people. A significant minority explicitly considers that local produce and local specialities are key factors in themselves.

- That many people perceive that local ingredients make an essential contribution to the quality of the meal, especially the quality of the meal and the taste of the food.

For the majority of tourists there is not a clear distinction between locally produced and speciality food. However food tourists do make some distinctions, and for them local specialities are associated with, better taste, and distinctiveness.

The most active purchasers of 'local foods' are however, not the food tourists, but the holidaymakers who do not pre-plan, but once on holiday are keen to try out local foods and specialities. This group does not distinguish between local and speciality and may in fact have a loose definition of what is 'local', which will encompass more than the local produce and local specialities that are the focus of this research. However, the research has demonstrated that this group is strongly motivated to experience local foods and meals. This interest is carried through to their choice of venue when eating out and their definition of the factors that turn a good meal into an excellent experience.

Recommended Marketing Approaches

Marketing in advance of the visit is most likely to be of interest to those motivated to consider local foods when they are choosing their destination, the food tourists, and to a lesser extent the 'interested purchasers'. Food tourists are looking for quality of service, presentation and cooking, but are also attracted by local specialities. Local food needs to be delivering a high quality experience. The food tourists do recognise that local specialities add to the taste and distinctiveness of the meal and these qualities are attractive to them, but it is quality rather than novelty that they are seeking.

Once at their destination a much wider audience is interested in finding opportunities to experience local foods. The target audience is mostly made up of the Interested Purchasers who are making quite spontaneous decisions. The aim must be to maximise the opportunities and encounters they have. There is widespread recognition among many tourists that fresh local produce and local specialities can contribute to the quality of their meals and to the enjoyment of their holidays. There are many who will make use of product labelling, branding and menu information. However, the promotion of this information needs to remain fun and in tune with the spontaneous nature of holidaymakers decisions about where to eat and what to buy.

There are many of positive images and links to build upon. Local produce has an image of, freshness, and is associated with personal rather than mass produced processes. These qualities link well with rural tourist themes of; rest, relaxation, good scenery and discovery.

There is also a strong link between meal quality and the use of local produce or preparation of local specialities. This gives serviced outlets and excellent basis for the promotion of 'local options' on their menus.

Marketing messages need to reinforce the images and motivations of current purchasers and widen the appeal to those that are currently food tourists and un-engaged. General motivational messages should include references reinforcing the value of local production to the local economy and local environment.

Holidaymakers' responses to labelling and branding are highly correlated showing that respondents are responding to the provision of more information rather than making a subtler distinction between the types of information on offer. The research did not seek to explore the perceived differences or benefits of labelling versus branding and this would require further research.

The client will need to carefully balance the costs and logistical problems of branding against the benefits that might be achieved. Local labelling may be as effective at this stage and much simpler to achieve.

Appendix A - 'Questionnaires'
Appendix B - 'Interview Locations'

are available upon request from:

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