



Canada Culinary Positioning Research – UK Travellers

A large group of people is seated at long tables covered with white cloths, dining outdoors in a lush green field. The tables are arranged in a long line across the middle ground. In the foreground, there is a field of low-lying green plants, possibly a vineyard. The background features a vast mountain range with dense green forests on the lower slopes and snow-capped peaks under a dramatic, cloudy sky. The lighting suggests late afternoon or early morning, with a warm, golden glow. A solid red square is positioned on the left side of the image, partially overlapping the text.

Study Background & Methodology

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Background and Objectives

Across all of Destination Canada's international markets, culinary activities such as "trying local food and drink" is one of the top leisure travel activities that travellers choose to do when visiting.

Destination Canada was interested in the role that culinary experiences and products have in how travellers choose a destination, so we conducted an in-depth analysis of over 22,000 respondents across 12 countries. We found that culinary experiences were important in determining destination choice in many markets, but that Canada had mixed performance when using culinary experiences or products to inspire international tourists.

For UK travellers, "trying local food and drink" is the most popular activity while on holiday, and culinary experiences and products are a key driver for why UK travellers choose to travel to many of Canada's competitors. However, it is not a key driver for UK travellers to travel to Canada.

This indicates an opportunity for Canada to better position its culinary offering to entice more UK travellers to come to Canada, including those who are interested in culinary tourism but may not currently be considering Canada as a culinary destination.

Based on this analysis, Destination Canada identified the need for a deep dive research study to inform a better understanding of this topic. The objective of this research was to better understand perceptions of Canadian culinary tourism, in order to inform marketing and potential product development focused on promoting Canada's culinary scene. In-depth qualitative research was conducted to gain a solid understanding of traveller perceptions, addressing the following key questions:

General attitudes and perceptions:

- How do travellers think about food/drink and travelling?
- What research or planning do travellers undertake for a destinations' cuisine?
- Is culinary a primary motivator for travel, an added bonus, something in between?

Perceptions of Canada as a culinary destination:

- What are their perceptions of Canadian cuisine? Where do these stem from?
- What are the drivers and barriers to considering Canada as a culinary destination?
- Is there a connection between Canadian culture and cuisine to leverage?

Optimizing culinary products and marketing:

- How can the marketing of culinary experiences be improved or optimized?

Study Background & Methodology (continued)

Methodology

Part 1: Study direction

Insights from a key driver analysis as part of Destination Canada's 2016 *Global Tourism Watch (GTW)* study found that among UK long-haul travellers, culinary-related activities stand out as a top leisure travel activity and an important consideration when selecting a travel destination in general, but are not strong drivers of travel to Canada. In other words, Canada's culinary tourism industry was underperforming in the UK market. As the UK is also currently Canada's largest overseas market for international visitors, it was identified as an important market to better understand this gap.

Part 2: Qualitative deep dive

Destination Canada engaged the market research firm Ipsos to conduct a qualitative online discussion with UK travellers, which took place from June 28-30, 2017. Participants were based in London, Birmingham, Glasgow, Manchester, and rural areas. The following screening criteria were used when recruiting participants for this discussion:

- Mix of age groups ranging from 19 to 64, even gender split
- Mix of past visitors to Canada and those who are considering Canada for holiday in the next two years and have a valid passport
- Mix of participants with children and no children at home
- Mix of food preference types, ranging from utilitarian to healthy to gourmet
- Mix of EQ traveller types: Learners, Enthusiastic Indulgers, Escapists, and Familiarity Seekers

Cautionary note:

The findings herein should be regarded as tentative hypotheses about the marketplace rather than as proven facts. This is inherent in the nature of this and any other qualitative research conducted with a small number of individuals.

Part 3: Quantitative validation

Following the completion of the qualitative research study, Destination Canada validated some of the key qualitative findings in a quantitative study – the GTW 2017 Pulse Check study. The survey was completed by n=502 UK respondents who had taken a long-haul leisure trip in the past 3 years or intend to in the next 2 years. The additional findings from this study are referenced throughout this report, with the full results available in the Appendix.



Key findings

Who Are British Travellers?

UK travellers relish travel for the escape and adventure, and love experiencing new cultures and foods in the process. Food and drink are linked to the culture of a place, and its history is interesting to many travellers. City dining or al fresco dining are equally interesting, provided the restaurant offers good ambience and vistas.

'Living like a local' is how many UK travellers like to experience a destination, including finding the best (insert food or drink here) it has to offer, getting recommendations from locals, and trying 'hole in the wall' establishments off the beaten track.

Whether they consider themselves foodies or not, atmosphere and the experience around food & drinks factor heavily on travellers' expectations and enjoyment of a dining experience. UK travellers like to see a balance between a great meal, good prices, and great experiences – which can happen anywhere, be it in a city or somewhere more remote.

They like to be "adventurous" when eating on the road, with any safety concerns focused mainly on avoiding food-related illness rather than comfort foods.



While the quality of the food & drink offered is the most important consideration (97%), the atmosphere and vibe of the establishment (94%) and locals' recommendations (87%) are also important considerations when deciding where to eat when travelling.




41% said they love experiencing different foods and will try anything once.

43% said they like to experiment with some different foods within limits.*

I'm usually looking for somewhere that is in a great location and has a great reputation for food. I was recently in Turkey and overheard a guy at the bar talking about the "best fish restaurant he'd ever eaten at" - I asked him more about it and it turns out he was well travelled but said this had the best fresh fish and was in an amazing location right in a beautiful bay called Gümüşlük - I was supposed to be doing a detox but couldn't resist this recommendation and headed straight there!

The thing about being adventurous about eating abroad is that you are going to get it terribly wrong sometimes. Probably the worst has been recommendations from hotels or tour guides that turn out to be a total tourist trap. Online guides are often quite good as you get a lot of real feedback from real people - it can save a costly mistake. I hate being taken for an idiot (especially maybe because I am English and they assume I have no taste buds - or taste!) and occasionally when you go to a restaurant they immediately go 'Yay, tourist' and automatically give you something bland and horrible, when you see the locals around you eating incredible food! Have to say France is a culprit here.

 *compared with 12% who said they mostly stick with the familiar and 7% who said they prefer to play it safe.
QPC7. Thinking about food when you are travelling, which of the following statements best describes you?
QPC8. When considering where to eat and drink during your travels, how important are each of the following?

Who Are British Travellers? (continued)

Some UK travellers say that newspapers, magazines and TV cooking shows help keep them up-to-date on food; however, most still do not consider themselves to be on top of food trends generally. Social media is used to peruse accounts and photos that catch their attention.

While food is not a key motivator to travel, researching a destination's culinary offering to understand regional dishes and set expectations is part of the travel planning process for many UK travellers. However, spontaneity also plays a role, and UK travellers want to be open to possibilities when travelling.



Just 10% strongly agreed that they like to keep on top of emerging food trends.

When planning a trip depending on the cost I can start planning a year in advance especially if will be costly I check trip advisor, then I google it, friends recommendations follows. I am looking for something unique and different I can experience for my taste buds. Some research can be done in advance , but sometimes arrival at the destination and recommendations from your hotel etc. or even locals go a long way. Researching things to do must be done in advance so you are prepared and not lose or waste time making choices.



Share & Search – Interacting with Social Media

Social media is a small part of how UK travellers research holiday destinations. A few belong to international traveller Facebook groups where they can search and ask for recommendations, like travel blogs and forums. While social media can inspire a trip/destination choice, the platforms lack the depth required for their research and many search elsewhere for helpful content.



80% consider online reviews important when deciding where to eat when travelling (including 27% who say they're very important and 54% who say they're somewhat important).

Photos and posts shared by friends/family/colleagues can influence or inspire travel plans or dining and experiential activities at a destination. These prompt conversations and information gathering to get recommendations.

I always find that most people are truthful on TripAdvisor, etc. so would use this as a good source. I'm on a Facebook Restaurant Group that has 20,000 followers so there's always someone that will recommend a restaurant in most places in the world.

*Social media is the best way to find great photos and inspiration because it is mostly posted by people similar to me who sought out the experiences. Review sites like timeout are good because they are trusted and have a great reputation. Conversations with locals will get you an unobstructed honest and trusted opinion, and usually they are delighted to be asked!
I definitely find inspiration from friends photos on Facebook and Instagram. I will take a similar holiday if I am excited by what I see. I will also try to seek out the same restaurants because I want to eat the same dishes.*

Not really as a picture of food does not influence me to take a holiday, I would have to speak to my friend a bit more about the destination and then do my own research. It may influence me to eat at the same restaurant by then again I would have to speak to my friend about it.



Perceptions of Canada

Canada is typically not top-of-mind as a country that could deliver on an exceptional culinary experience, often due to lack of exposure. Perceptions of Canada and its culinary scene are largely driven by UK travellers' own experiences, those of friends/family, and some big and small screen stereotypes. Past visitors recall having great food, high quality meals, and positive dining experiences. Food does not factor strongly as a driver to visit Canada, and Canada is not perceived to offer a widely adventurous cuisine beyond unique meats. A much more compelling driver is Canadian natural scenery, or for some, visiting friends and family in Canada.

Visiting wineries, craft beer tours and tastings are of interest among this audience; however, Canadian wine and beers and the related experiences available in Canada are relatively unknown in the UK, especially compared to other destinations such as New Zealand, Napa and South Africa.

If someone asked me about Canadian food and drink, I'd say it's fast and furious, because it is fried foods, chicken, chicken and more chicken deep fat fried in all different ways and combinations. And it makes me feel excited but curious of weight gain and uncertain of the ingredients but it makes me want to experience Canada and see if it's like what is portrayed in the media and gain a real and truthful perception about visiting Canada.

Canada for organic and local produce, moose steaks and artisanal foods. Canada was in my top 5 – I have experienced great food there.

Being French I am curious about the French Canadian culture, history etc... The food will be a bonus and I imagine some fresh products and lots of fish.



Perceptions of Canada (continued)

Those familiar with Canada give it top marks for delivering fresh food and great dining experiences. Non-visitors imagine that Canadian cuisine would be focused on rustic, farm-grown, caught, or hunted food, and would expect to find a variety of fresh and local ingredients. However, they note that Canada is not known for a particular dish or cuisine. Proximity and perceived similarities to America play limited roles in influencing any negative perceptions of Canadian cuisine.

UK travellers are especially interested in culinary products such which leverage the beautiful nature and scenery that they would expect to find in Canada. Highlighting the friendly and welcoming people that they would expect to find in Canada also helps with the appeal of culinary experiences. They are interested in products which 'surprise and delight', as long as they are still believably Canadian.

I've just returned from an amazing trip there and would like to go back again very soon. We never had a bad meal there! Lots of salmon and lots of ale – very nice.



UK travellers expressed more interest in social and nature based experiences than in high-end restaurants.

Diverse cultures, climates and landscape make Canada a destination to suit any interest. Canada's natural environment is one of the most beautiful in the world. From pristine coastlines to rugged mountains and sparkling lakes its out of world. Array of outdoor activity make it more thrilling experience and one have lots to do and I always personally feel don't have much time to enjoy it as there are so many things to do. I have close family in Canada so don't find a bit different from home. But what I have personally experience is the variety of the food is quite authentic and healthy along with addition of lots of natural food in the dishes.



Testing Positioning Hypotheses

Prior to this consumer research, the Destination Canada team conducted preliminary research and consultations with key stakeholders in the Canadian culinary tourism industry. The hypotheses developed were then crafted into four creative “tensions” to be explored with consumers through through eight creative territories representing the two sides of each tension. The overarching question was defined as: How should the Canadian culinary offering be positioned for the global tourism market?

ATTITUDES & PERCEPTIONS

“Traditionally” (and somewhat stereotypical) Canadian foods based on ingredients you can only find in Canada



There is no “Canadian” food – we get bored with only one type of cuisine. Canadian cuisine is ethnically diverse, like Canada. You can find the best of the world in Canada.

TENSION: WHY IS IT SPECIAL

“Prestige” – high quality, award-winning, innovative restaurants (that are hidden gems)



Fresh, local ingredients in the hands of passionate chefs make something you can only find in Canada

TENSION: HOW IT AFFECTS TRAVEL

Unique, event-based culinary experiences that will turn your trip into something extraordinary (e.g., 5 star dinner in the Bay of Fundy while the tide is out”



When you get tired of being a tourist, come experience our culture like we do – authentic “locals” experience



TENSION: ROLE OF CULINARY

Culinary experiences while travelling should take you out of your comfort zone



You need to trust what you eat – it can range from sublime to comfort food – but it needs to be safe.

Positioning Evaluation Results

The territories evaluated and their underlying tensions provide guidance for future creative. Moving forward, content should be developed which lands closer to one end of the tension spectrum by doing more of this  and less of this 

TENSION: WHAT



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TENSION: WHY IS IT SPECIAL



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TENSION: HOW IT AFFECTS TRAVEL



Unique, event-based culinary experiences that will turn your trip into something extraordinary (e.g., 5 star dinner in the Bay of Fundy while the tide is out”



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TENSION: ROLE OF CULINARY



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Recommendations

✓ Including 'old' information with new information about Canada can act as a guide post and encourage acceptance of new views. Leverage this by incorporating well-known cityscapes or Canada's natural scenery in culinary content to aid recognition of Canada. Include well-known Canadian food staples in addition to identifying regional ingredients that venture further from the expected (e.g. multicultural or avant-garde dishes).

✓ Regional or traditional dishes are of interest to UK travellers when planning a trip to Canada or any other destination. Content should highlight what is unique about Canada and its culinary offering when promoting ingredients, products or experiences that also exist in competing travel destinations which are more easily accessible to UK travellers.

✓ Ethnic diversity in Canadian food is a credible angle for promotion; however, it is important to focus on how the local destination and ingredients have inspired traditional meals – how the meals presented are unique to Canada. In particular, French cuisine in Canada does not feel special to UK travellers; proximity to France may prevent consideration, but a connection with the uniqueness of French-Canadian history and local interpretations of cuisine may help to pique interest.

✓ Rustic, farm-grown, caught or hunted food are perceived to be an important part of Canada's culinary identity. Leveraging this view can help Canada stand out as a frontier for local food experiences. However, images of fresh and local ingredients alone are not enough to showcase Canada's culinary scene. Presenting finished dishes made with those quality ingredients helps to make the 'sell' for Canada's food and drinks.

✓ UK travellers prefer to avoid tourist 'trap' food and drink recommendations and enjoy the social nature of connecting with local people. However, they like to feel invited in and offered suggestions, rather than impose upon locals by asking for recommendations. Ensure culinary content addresses the wealth of information available for research and planning, while also stressing the friendliness of Canadians to add a sense of comfort if they want to ask for help.



Recommendations

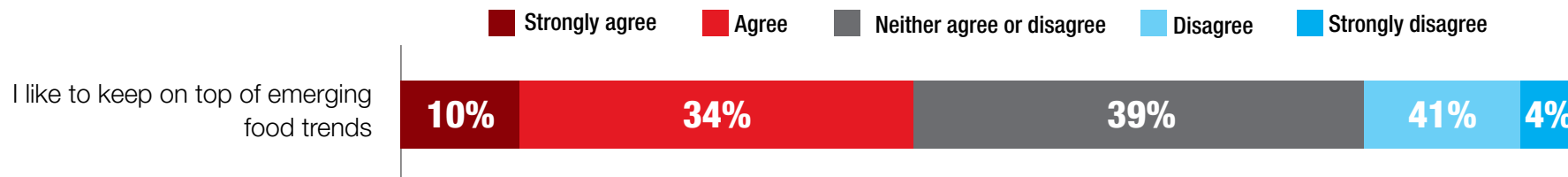
- ✓ UK travellers consider themselves adventurous eaters with exposure to a variety of cuisines, and Canada is not currently perceived to have a particularly adventurous culinary offering. There is opportunity for Canada to present more unique culinary options, while still ensuring a 'safe' (i.e. food health & safety) culinary experience.
- ✓ Content should focus on the atmosphere and social experience surrounding a meal as well as the quality of the actual food or drinks themselves, as these elements factor heavily on UK travellers' expectations and enjoyment of a dining experience and can provide the "unique" aspect that they look for when travelling.
- ✓ Ensure content containing people incorporates diversity, socialness, and welcoming body language. These elements can increase interest by helping UK travellers place themselves in the experience being presented, as well as representing a social aspect of what they would expect to find in Canada.
- ✓ Ensure culinary content includes imagery of experiences across all four seasons to highlight that Canada is not only a cold winter destination. Visits during warm and mild weathered periods are most appealing to UK travellers, as they express aversion to very cold weather.
- ✓ Activity costs appear high to this group of travellers for some activities. Continued messaging and education about the costs in Canada on arrival; it may match the nominal price, however the currency discount is where value is achieved.



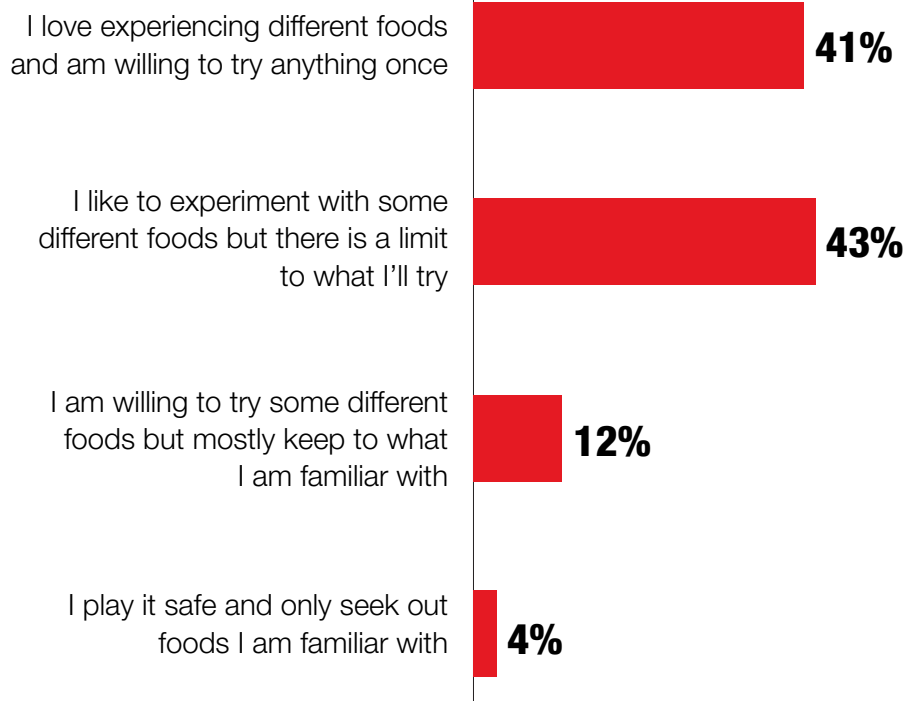


APPENDIX:
Quantitative Validation Results

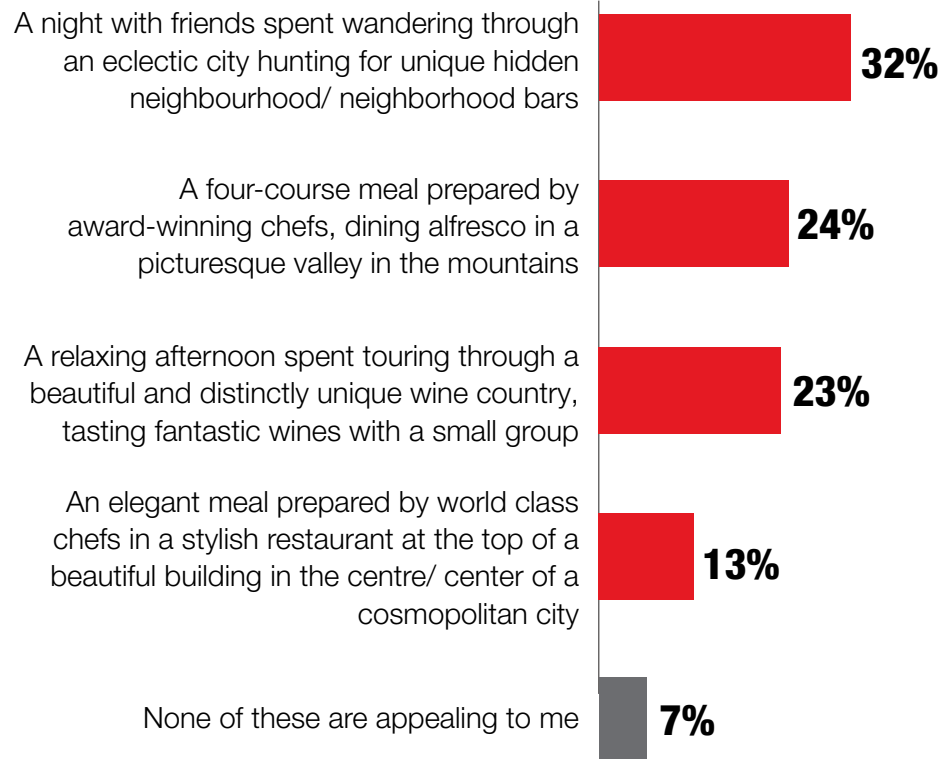
Attitude Towards Food and Drink



New question added in Pulse Check Wave 1 – no trending.
 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=502)
 QPC6. How much do you agree or disagree with the following statement ...?



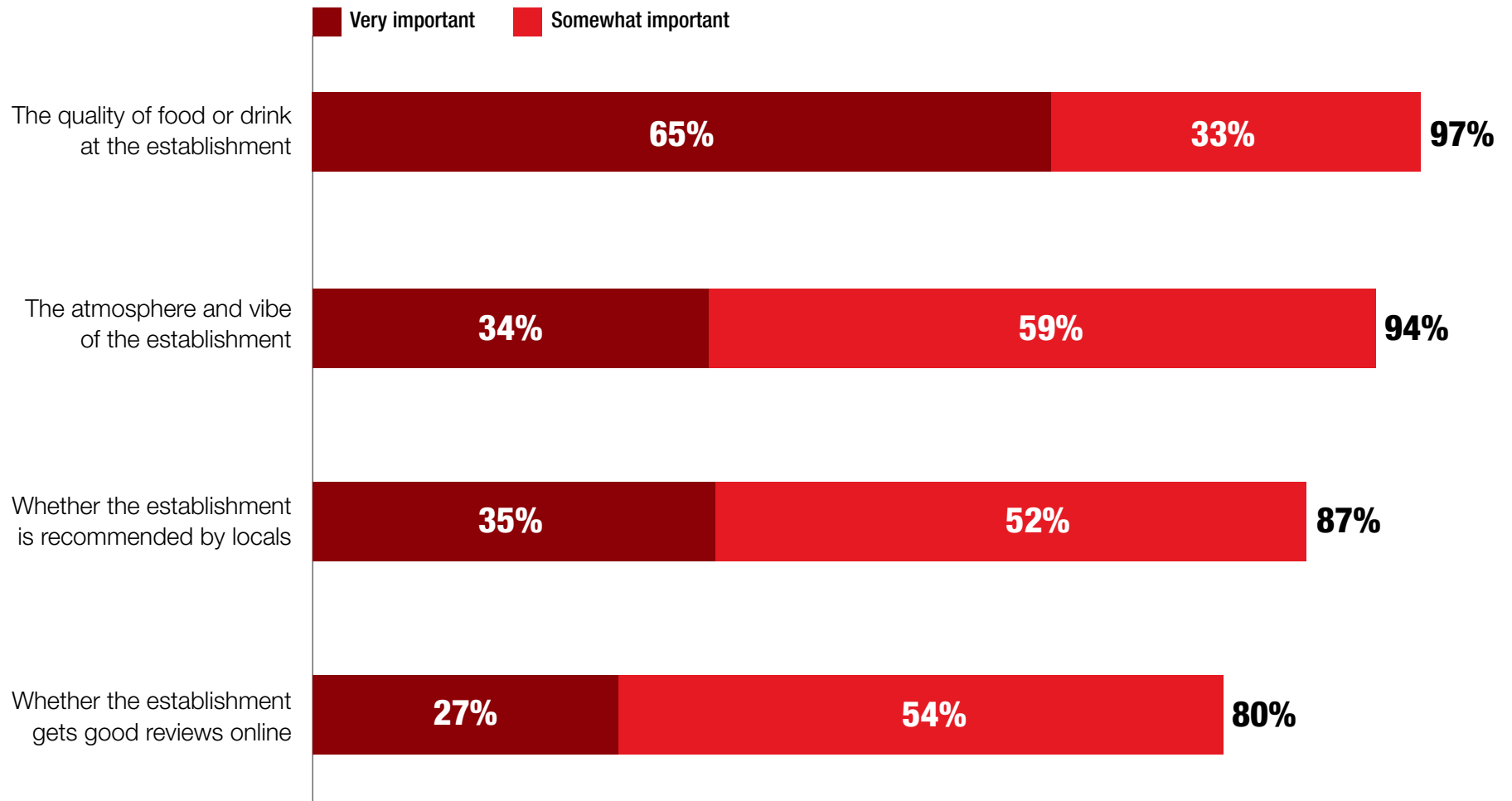
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 Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=502)
 QPC9. Which of the following food and drink experiences is most appealing to you personally?

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Factors Considered when Choosing Where to Eat/Drink



New question added in Pulse Check Wave 1 – no trending.

Base: Long-haul pleasure travellers (past 3 years or next 2 years) (n=502)

QPC8. When considering where to eat and drink during your travels, how important are each of the following?



Thank you