



FOOD TOURISM

*Culinary experiences as a means
of travelling and discovering countries*

OCTOBER 2014

pangaeanetwork 

AIGO
communication and more



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Pangaea network

Who we are



Pangaea network is an international organization of independent agencies offering consultancy, marketing and communication services in the tourism and hospitality industry.

The project is a multi-year collaboration between its founding members: Massimo Tocchetti of AIGO in Milan (Italy), Jo Johnson of Four bgb in London (UK) and Dorothea Hohn of Global Communication Experts in Frankfurt (Germany); three leading agencies in the travel and tourism industry that seek to provide their customers with access to global and local resources.

Pangaea network currently has 12 partners and covers more than 20 regions across the world: Asia; Australia; Austria; Belgium; Brazil; Canada; Czech Republic and Eastern Europe; France; Germany; Ireland; Italy; Latin America; Portugal; Scandinavia; Spain; South Africa; Switzerland; The Netherlands; UAE and Oman; UK; USA.

The Study

Twice a year the Pangaea Observatory polls the European tourist industry on the patterns and trends that shape the world of travel.

One industry which has seen significant growth in recent years is food tourism, and we interviewed experts to analyse its role: to what extent do culinary experiences influence consumers' choice of travel destination? Which are the most desirable destinations? And what are the most popular annual events?

Food Tourism here refers to trips made to destinations where enjoying unique and memorable food and drink experiences enriches the act of travelling.

Culinary tourists are identified here as people who are willing to travel the world partly in order to sample and experience authentic national and international cuisine.

The survey was carried out in September 2014 across five European countries: France, Germany, Italy, Spain and the United Kingdom.



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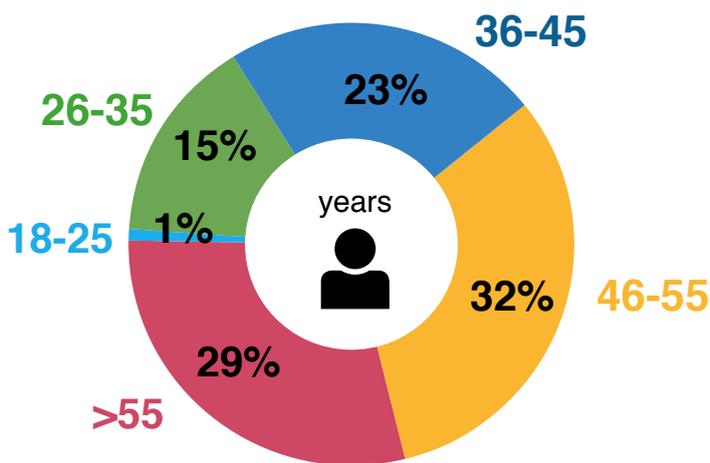
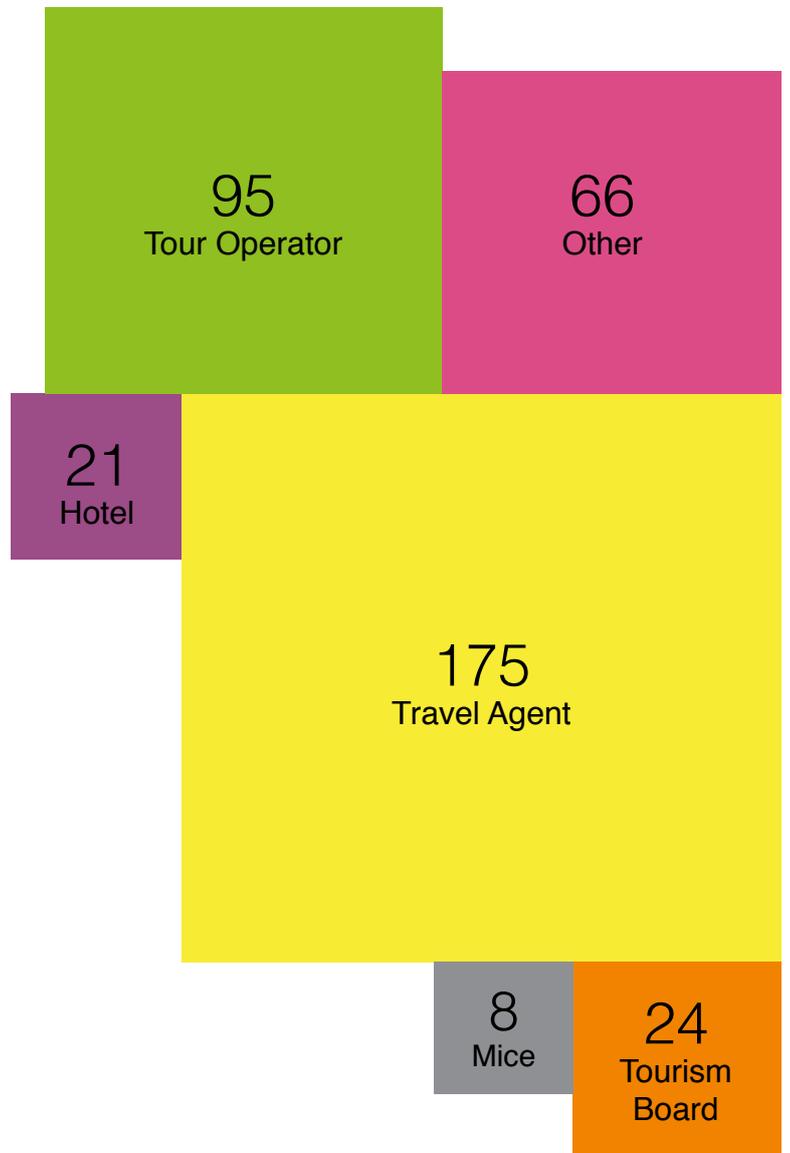
indigo
CONSULTING

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01 PANEL

The sample comprised 389 travel industry workers, mostly aged between 36 and 55 as well as over 55

69% of those interviewed were travel agents or tour operators.



SCENARIO



02 THE CULINARY FACTOR

66% of respondents believe that culinary experiences are one of the key elements in the travel choices made by their clientele.

However, 30% of the travel professionals do not recognize the existence of a real market trend; indeed, they do not think that culinary factors influence the traveller when selecting the destination to visit.

The remaining 4% are unsure.

The markets where culinary aspects are particularly appreciated by travellers are ranked as follows:

Spain 82%

UK 73%

Italy 61%

France 60%

Germany is split into two groups: those (55%) who consider the food experience important and those (45%) who believe it is not a crucial factor. The latter chose the destination itself and tourist attractions (sites to visit and itineraries to follow) as the main reasons for travelling.

Is a key factor in the travel choice?

YES 66%

NO 30%

**DON'T
KNOW** 4%



03 LOCAL FOOD AND WINE

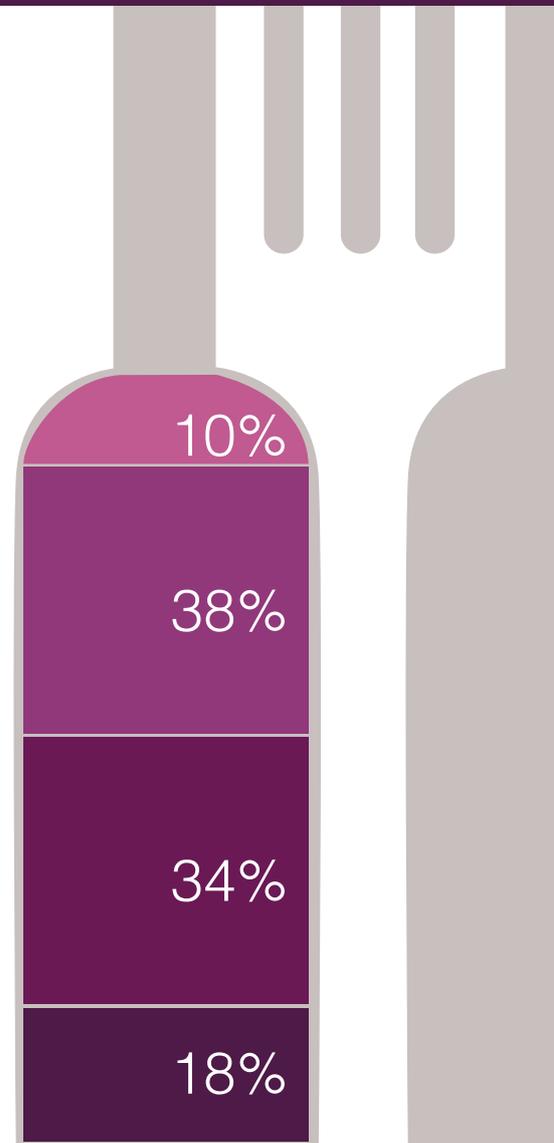
The answer in Europe is in line with the data analyzed above.

In the markets where culinary factors prevail, local food and wine affect the image of the destination by up to 50%. In order:

Spain 48%
France 44%
UK 39%
Italy 37%

The highest percentage of German experts (41%) believe that local food and wine specialties only make a 30% contribution to the attractiveness of a country.

to what extent do they influence the perception and the image of a destination?



Over
50%

Up to
50%

Up to
30%

Up to
15%

04 GROWTH OF THE SEGMENT

A diverse range of outcomes were witnessed.

40% of the travel industry has noticed a small amount of growth in the last three years.

38% has registered a considerable increase.

Only 8% believe that there has been no increase.

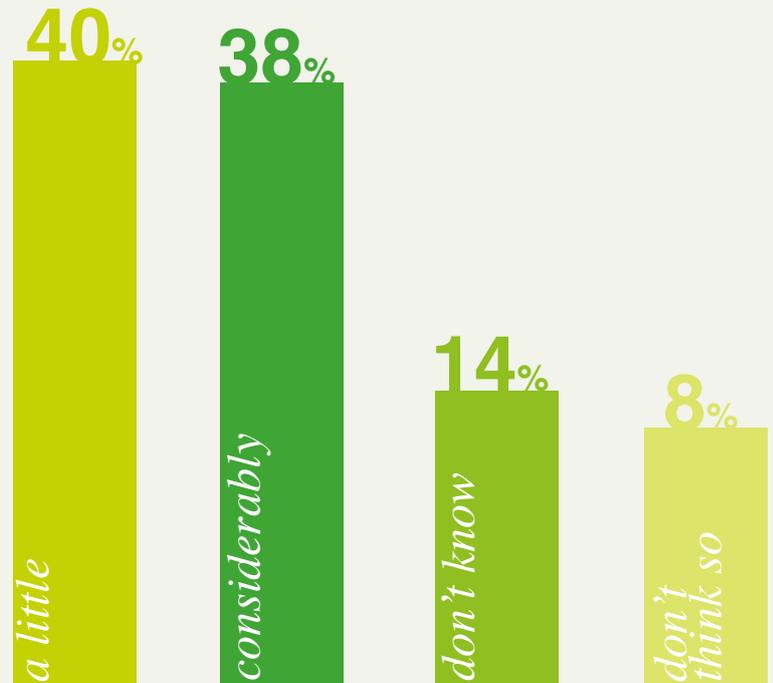
14% did not answer the question.

The market cross-section reveals that:

42% of the Italian travel trade believes that food tourism has grown a little, whilst 40% thinks it has increased considerably.

In Germany (52%) and Spain (44%) the perception of limited growth prevails.

France (56%) and the UK (46%) report considerable expansion.

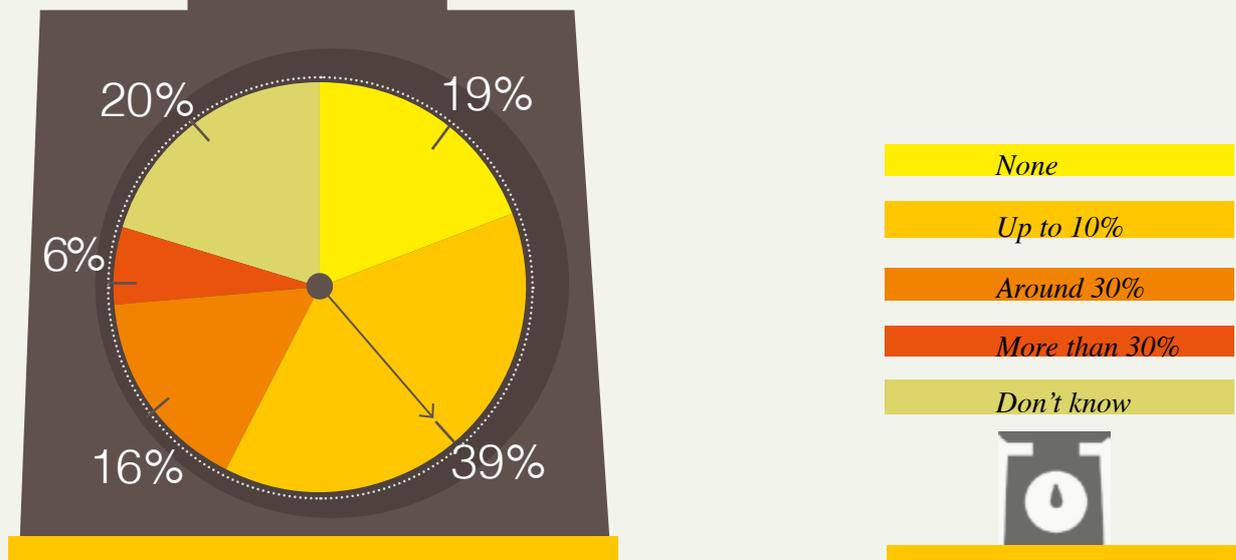


05 TURNOVER IN THE TRAVEL INDUSTRY

The different markets detect different levels of turnover produced by food tourism in their businesses.

The majority of Spanish (60%), French (44%), Italian (40%) and British (26%) respondents stated that food tourism makes up 10% of their overall travel turnover. It is worth highlighting that in the United Kingdom another 25% claimed that turnover reached 30%.

What percentage of your business is represented?



In contrast, German professionals make up the highest proportion (41% and 26% respectively) of those who could not answer the question and those who believe that this segment does not have any influence on their business.

06 CULINARY TRIPS: SALE & PROMOTION

41% of people interviewed sell travel packages dedicated to food and wine tours, while 29% do not yet offer this product, but are planning to develop it.

The remaining 30% do not sell culinary packages and have no interest in doing so.

The most successful sales channel is face-to-face selling to customers (26%).

Only 22% of the travel trade promotes packages through the Internet and social networks (i.e. Facebook and travel blogs).

16% use brochures and industry magazines.

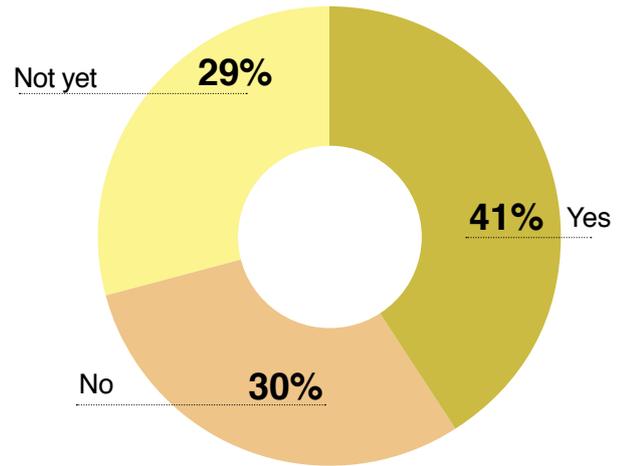
13% use display stands

13% organize B2C events, during which travel itineraries are advertised.

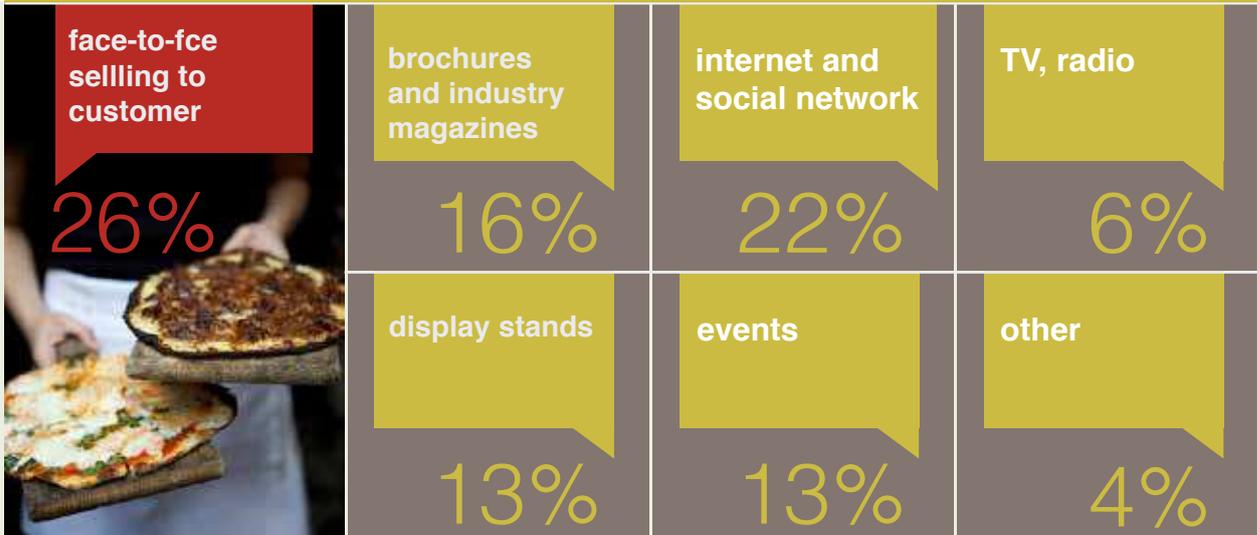
Radio and TV account for a 6% share.

4% choose 'other channels', which in the majority of cases means relying on direct mail to customers.

Sale



Promotion



TRENDS



07 THE PRODUCT/COMBINATION

According to the majority of experts, travellers tend to combine culinary experiences with visits to the destination and its surroundings (25%), preferring cultural itineraries (26%).

In 17% of cases health and wellbeing is the most popular occupation with which to combine it, while 'themed events organized at the destinations' and the 'opportunity to shop' are preferred by 14% and 11% respectively.

Outdoor activities, including sports, are chosen together with culinary experiences in only 6% of cases.



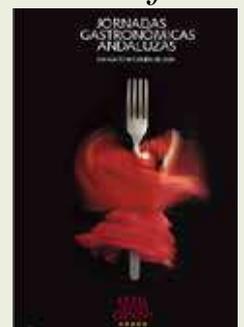
08 THE PRODUCT/ THE KEY ELEMENT

The response was unanimous across Europe when ranking the most appealing activities:

- Visits to farms and markets of local producers (29%)
- Purchasing local products (26%)
- Food and wine events such as festivals etc. (20%)
- Cooking workshops (13%) *
- Food and wine fairs (7%)

3% did not answer the question. Renowned restaurants and cultural visits were suggested by the remaining 2%.

*In the UK only, cooking classes are preferred to themed events (43 % vs 31%).



09 THE BEST KNOWN REGIONS

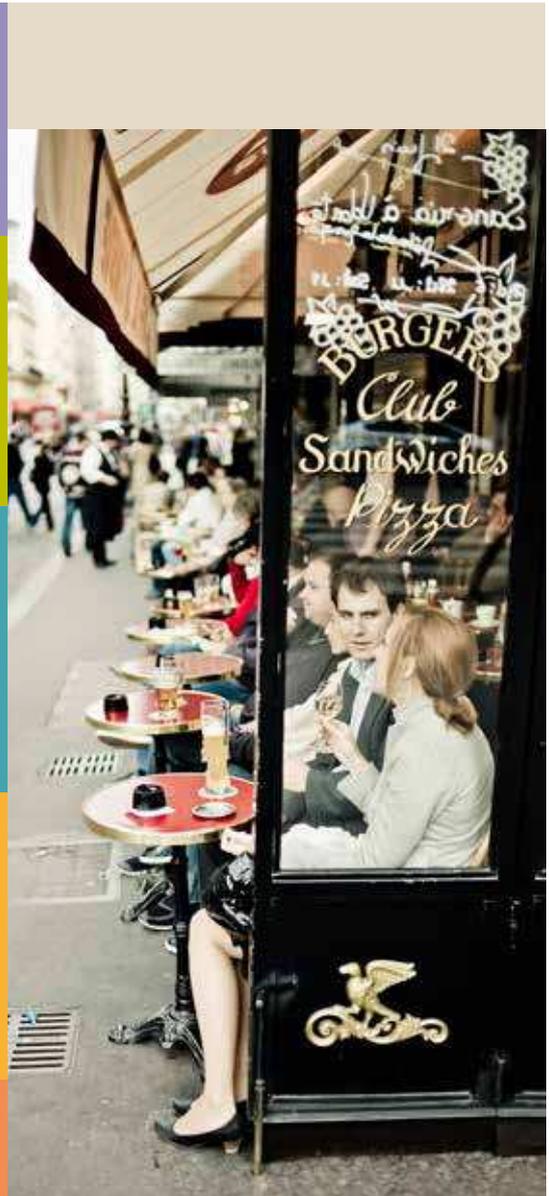
We asked each interviewee to identify, within their home country, the most well-known culinary regions:



10

THE MOST DESIRED DESTINATIONS

The most valued destinations, both near and far:



11

RENOWNED CHEFS AND RESTAURANTS:
THE MOST POPULAR

In the travel industry the most famed chefs and restaurants are:

The sample in France does not provide significant data for this question.



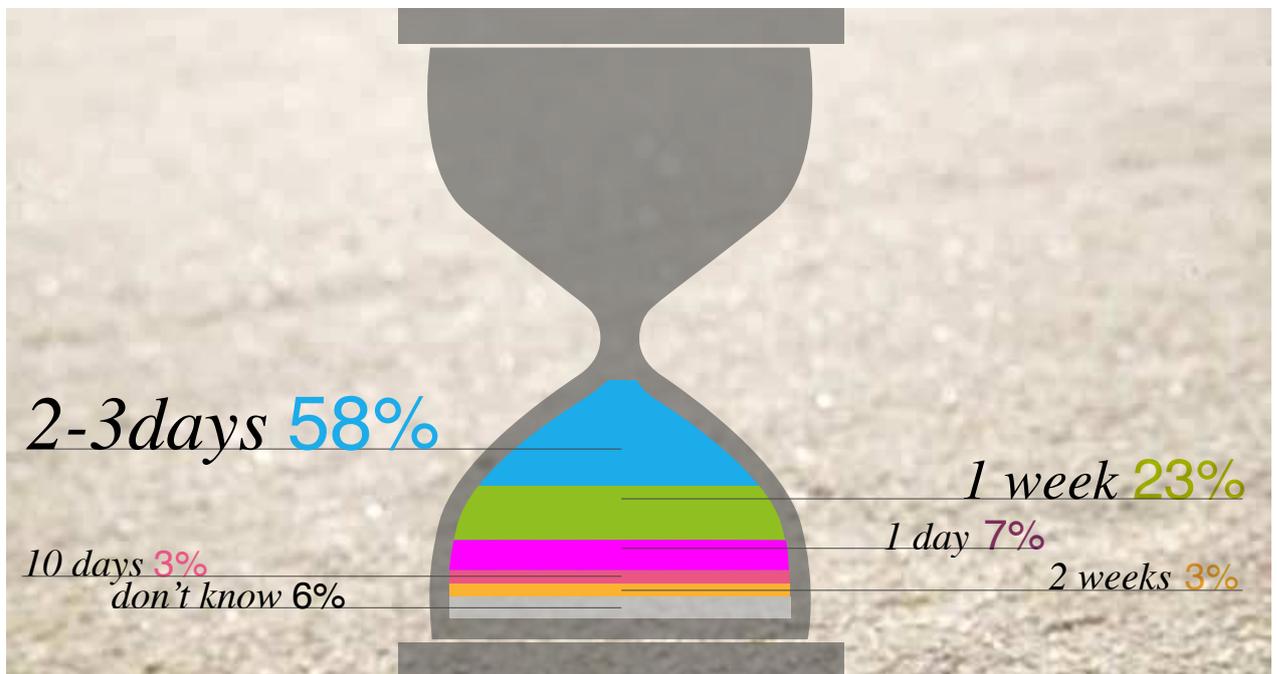
12 TRIP DURATION

The answer was the same throughout Europe: the majority of professionals (58%) affirm that the preferred duration is “2-3 days”.

23% indicated “one week”, and “one day” was selected by 8%.

“10 days” and “two weeks” were both chosen by 3%.

6 % could not provide the average trip duration.



13 EXPO 2015

41% of European experts will not offer their customers a trip to Italy to mark Expo 2015.

A high percentage has not yet decided whether to promote the event (34%).

Only 25% of people interviewed will offer a travel package related to Expo 2015.

In the Italian travel industry, the percentage of those who will promote the event rises to 58%.



Will you promote Expo?

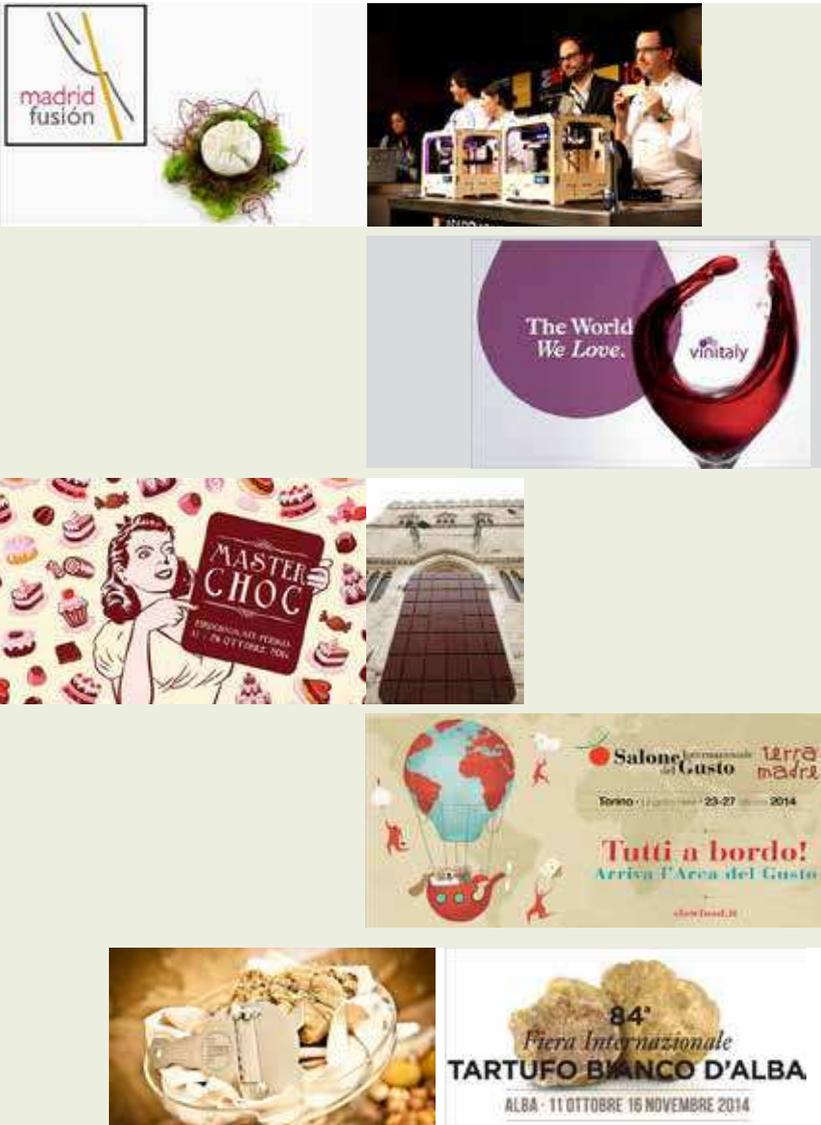
25% → YES

41% → NO

34% → DON'T KNOW

14 FOOD EVENTS

Some of the most popular and best-loved food events are: Vinitaly, Fiera del Gusto (Festival of Taste), Eurochocolate, Fiera Tartufo di Alba (Alba Truffle Festival), Madrid Fusion...



Jan	
Feb	<i>Madrid Fusion (Madrid)</i>
Mar	<i>Vinitaly (Verona) Bacchus (Toulon)</i>
Apr	
May	
Jun	
Jul	
Aug	
Sep	<i>Barcelona Degusta (Barcellona)</i>
Oct	<i>Salone del Gusto (Turin) Eurochocolate (Perugia) Fiera Tartufo (Alba) Hong Kong Wine & Dine Festival (Hong Kong)</i>
Nov	<i>Fiera Tartufo (Alba)</i>
Dec	

PROFILE OF THE CULINARY TRAVELLER



15 WHO BOOKS

According to 53% of the interviewees, food industry events are booked by both men and women.

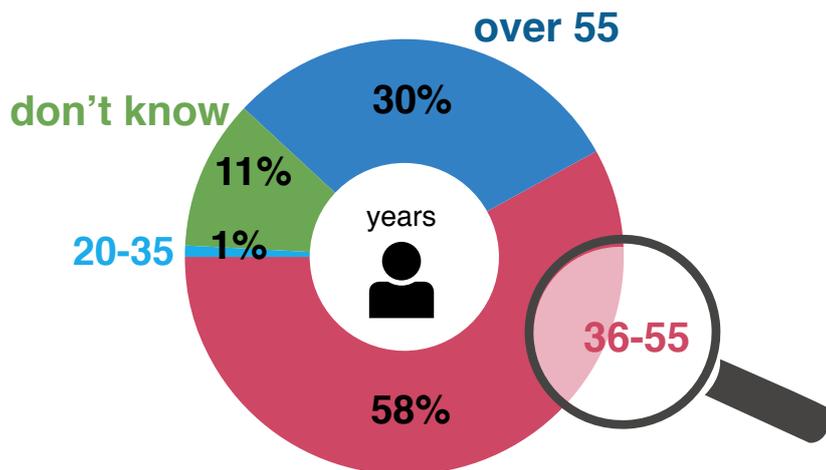
Among those who reported a predominance of one sex over the other, women were indicated in 23% of cases, men in 13%. 11% could not answer the question.

The German market is the exception, in which the majority of reservations are made by women (46%).

The average age of those who book ranges from 36 to 55, according to 58% of the respondents.

30% indicated those over 55 as the main travellers in this segment.

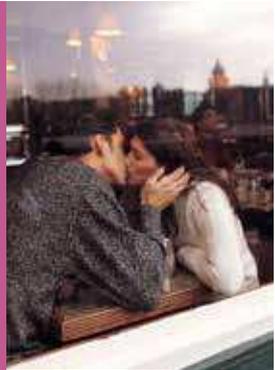
11% could not answer the question, while only 1% of respondents believe that the people who book are aged between 20 and 35.



16 TRAVEL COMPANIONS

The answers to this question were homogeneous all over Europe. According to 50% of the interviewees, culinary trips are preferred by couples. Groups of friends come next (18%), followed by associations / thematic groups (15%). 9% travel with family and only 2% travel alone. 6% did not answer the question.

couples
50%



friends
18%





groups
15%




family
9%





don't know
6%



alone
2%



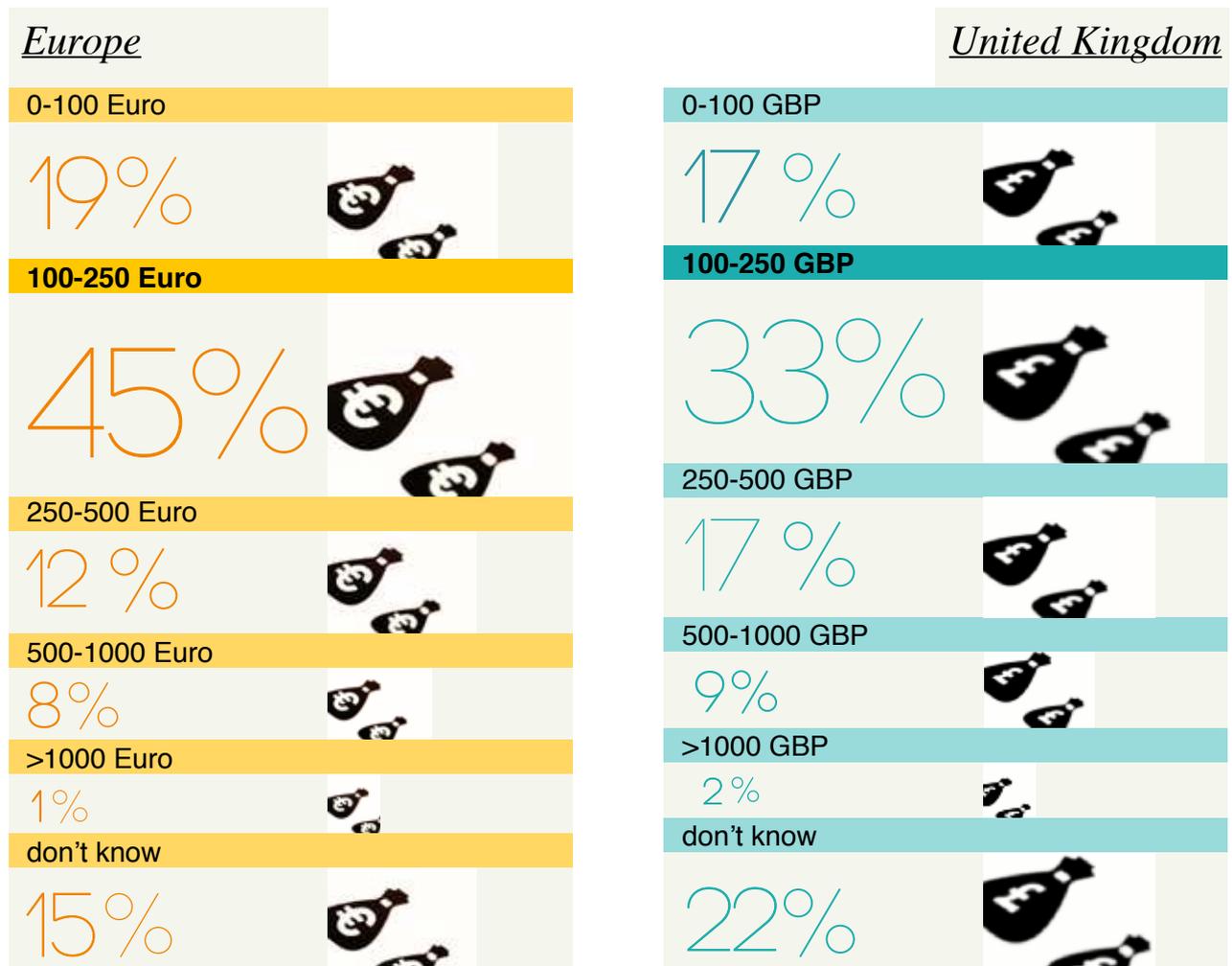

17

AVERAGE DAILY EXPENDITURE

We analyzed the answer in two different currencies: Euro and GBP.

45% of the professionals (excluding those from the UK) affirmed that the average expenditure per person per day is 100-250 Euros. 19% believe it is no more than 100 Euros, while 15% could not estimate a figure. 11% indicated expenditure between 250 and 500 Euros; 8% estimated a budget between 500 and 1,000 Euros and only 1% think the investment exceeds 1,000 Euros.

The UK's response reflects the trend in the four European markets mentioned above. 33% chose 100-250 GBP, while 22% could not answer the question. 17% indicated an average spend of between 250 and 500 GBP, and another 17% registered a budget of less than 100 GBP. 9% indicated 500-1,000 GBP and only 2% went over 1,000 GBP.



18

WHO IS
THE CULINARY
TRAVELLER

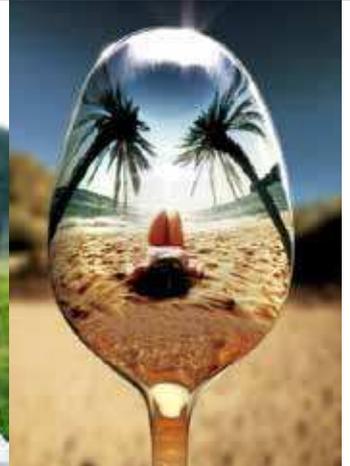
When answering the question: “How would you define consumers who choose to purchase a culinary tour?”

55% of professionals describe them as travellers looking for authentic aspects of the country they visit, including culinary experiences.

28% believe it is more appropriate to define them as people who are looking for time to socialize and spend time together through a culinary trip.

Only **9%** think they are tourists moved by a socio-cultural trends.

Another **8%** do not recognise the profile



CONCLUSIONS



19 CONCLUSIONS

- *The culinary tradition affects the image of a destination and can determine the choice of traveller*
 Spain, France, UK and Italy are the markets in which the largest number of professionals believes this to be true
- *A real segment of the tourism market*
 41% of respondents sell packages 'ad hoc', 29% plan to do so. The sale of culinary trips accounts for 10% of total sales from Spain, France, UK and Italy
- *A tailor made communication*
 The promotion is primarily provided through direct advice to the client, the internet and social media and specialized publications
- *A growing sector*
 Over the past three years, 78% reported an increase in demand; of these, 38% said that the increase was 'considerably'
- *Potential customers*
 Men and women aged between 36 and 55 years old, prefer to travel in pairs for 2-3 days and spend an average of between 100 and 250 Euro / GBP per person per day
- *The added value*
 The cultural itineraries , visits to the destination and the surroundings and wellness are the most requested. Visits to markets and farms, buying local products and themed events are the winning mix of trip



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