Insight Department:

Opening up Scotland's larder to our visitors

Exploring the role of food & drink in the visitor experience

Topic paper
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VisitScotland | Alba

Welcome

FROM FRESH SEAFOOD TO FINE DINING

Here, in Scotland, we've long enjoyed a well-deserved reputation for the quality and individuality of our whiskies, our shortbread and our strawberries, our Aberdeen Angus beef and our wild Scottish salmon. Our rich, natural larder certainly stands us in good stead as a holiday destination that can offer quality food and drink experiences which will appeal to a wide variety of visitors.

The rise of 'foodie culture' in the UK, and within Scotland's core visitor markets in North America and Europe, means that an interest in (and indeed a passion for) food and drink, is an increasingly important aspect of many people's lives – a lifestyle choice rather than simply a necessity. Food tourism is no longer just about niche culinary experiences sought out by the dedicated foodie, but about regionally relevant food and drink offerings which provide something appealing for every occasion, every budget and every taste. When people are away from home, authenticity and diversity are key.

USING INSIGHT TO INFORM OUR FOOD AND DRINK OFFERING

Scotland's Tourism Strategy 2020 identified food and drink as key elements in the improvement of the visitor journey. While food and drink aren't typically drivers of destination choice, nonetheless visitor research does tell us that they can significantly enhance our visitors' experience – and therefore enjoyment – of a particular destination. A strong food and drink offering can help us to diversify our visitor offering in Scotland, stimulating local, regional and national development.

With our rich and seasonally variable larder, Scotland is well placed to excel in the provision of locally sourced, high quality food and drink products for visitors from near and far.

The purpose of this Topic Paper is to highlight the latest insights regarding food and drink and Scottish tourism, collated from a range of sources.

Overview

- Food and drink is an important part of the visitor experience with visitors keen to try local food and drink.

- Scotland's food and drink products and activities can align with the perceived benefits of a holiday or short break in Scotland by connecting visitors to Scotland's natural environment, local people, local customs and helping to create a sense of place.

- A positive gap exists between the expectations and experience of the quality of food in Scotland, particularly for international visitors, with experience being more positive than expectation. Exceeding expectations may be positive, but also points to the need to raise expectations by raising the profile of Scotland's food and drink offering. We need to find ways to surprise or challenge consumer perceptions.

- Availability of local produce and value for money when eating out are two areas of the visitor experience which attract lower satisfaction scores.

What do visitors expect to see and experience in Scotland?

Today, visitors are increasingly discerning in their choice of holiday destination and their reasons for visiting a place are often a desire for a deeper and wider experience rather than just 'a place to spend time'.

Visitors want to make real connections with the locations they visit so will actively seek destinations that can deliver a life-enriching experience. Food and drink activities are an excellent way to support this aspiration.

Pereceived Benefits of a Holiday/Break in Scotland

(VisitScotland Research)

Exploring perceptions of Scotland as a holiday destination with audiences who reside both in the UK and in key overseas markets has highlighted a number of strong and consistent features associated with the core benefits of a break in Scotland (see map).

Scotland's food and drink offering may not stand out as a front of mind perception of Scotland as a holiday destination but food and drink can make an important contribution to the Scottish visitor economy.

- Food and drink is inextricably linked to Scotland's natural environment – **our rural landscape and coastal areas** – and making connections to this will help our visitors to develop a strong sense of place.

- Eating out, visiting specialist markets, enjoying distillery tours or exploring local shops and food events connects our visitors with **local people**, helping them to engage with the growers, producers and suppliers of local or regional specialties.

- Food and drink experiences can also connect our visitors to the **local culture and customs** of a destination, helping to tell the story of the area and creating a unique and memorable identity for it.

- Complementing mainstream sightseeing opportunities, food and drink attractions can often offer our visitors a hook to explore destinations that are **off the beaten track**, thus broadening their geographic experience through natural exploration.

- VisitBritain (2014) research indicates that almost one in four international visitors to Britain purchase food and drink to take home (rising to 40% for international visitors who visited Scotland) – **a fantastic retail opportunity** for quality, authentic and appealing products! 'The Spirit of Scotland' marketing campaign, including seven 'Spirits' of Scotland (warmth, guts, humour, soul, determination, spark, fun) can be used to influence the packaging and development of local food and drink products for visitors to take home.

A wealth of edible opportunities

87% of UK holiday-goers think that their food and drink experience is important while on holiday; 39% consider this very important and only 2% thinks it's not important at all.

62% of holiday-goers think it is important that the food that they eat on holiday is sourced locally; 29% thought it was not very important.

Research into food and drink experiences strongly suggests that simple and local are the order of the day in terms of visitor appeal and that a range of activities can hold appeal for visitors.

WHICH, IF ANY, OF THE FOLLOWING TYPES OF **DINING EXPERIENCE** DO YOU ENJOY WHEN YOU ARE ON HOLIDAY?	
Eating simple, locally sourced food in local restaurants	58%
Eating pub food	42%
Eating in an unusual setting	34%
Buying local food produce	29%
Following the dining tips of locals	28%
Doing my own cooking in self-catering accommodation	24%
Buying food from local farmer's markets	20%
Michelin-starred cuisine	7%
Foraging or picking my own produce	3%
Hiring a gourmet chef to cater for me	1%

YouGov UK omnibus for VisitScotland, 2014

WHICH, IF ANY, OF THE FOLLOWING **ACTIVITIES** DO YOU THINK WOULD APPEAL TO YOU?	
Having tea and cake at a local cafe	57%
Eating fish and chips outside	56%
Drinking at a local pub	54%
Eating local ice cream	51%
Tasting the food/ drink at local food markets	48%
Having fresh seafood	39%
Drinking local drinks	36%

WHICH IF ANY OF THE FOLLOWING TYPES OF **SCOTTISH FOOD OR DISH**, APPEALS TO YOU?	
Scottish beef	60%
Scottish salmon	51%
Cheese	42%
Porridge/oats	40%
Scottish lamb	37%
Scottish seafood	35%
Scotch whisky	29%
Scottish berries	27%
Haggis	27%
Scottish beer/ale	23%

YouGov UK omnibus for VisitScotland, 2014

When in Scotland...

Research from the latest Scotland Visitor Survey illustrates that almost all visitors dined out whilst on holiday in Scotland. But experiencing Scottish food and drink certainly isn't confined to traditional 'dining out' – we offer a wealth of different ways in which to participate in eating and drinking – all of which help to connect our visitors to their destination.

Food & Drink Activities Undertaken by Overnight Visitors to Scotland (All Visitors)

Dined out in restaurant, cafe or pub	92%
Tried local food	55%
Tried local drinks	46%
Night out/visited pubs	35%
Had a picnic/BBQ	29%
Visited a whisky distillery	20%
Attended a food & drink event	4%
Went on a food/drink trail	1%

Which of the following did you experience during your holiday / short break in Scotland? (All Visitors)
Source Scotland Visitor Survey 2015/2016

Exploring these activities more closely, by the origin of the visitor, reveals that long haul and European visitors were most likely to experience local food and drink and visit a whisky distillery. These activities were particularly popular with the following markets:

Food & Drink Activities Broken Down By Market

	SCOTLAND	REST OF UK	EUROPE	LONG HAUL
Dined out in a restaurant, café or pub	89%	91%	93%	97%
Had a picnic or BBQ	33%	30%	26%	20%
Tried local food	45%	49%	72%	81%
Tried local drinks (e.g. whisky, craft beer)	36%	37%	68%	72%
Night out / visited pubs	29%	31%	41%	55%
Attended a food & drink event	3%	3%	5%	7%
Visited a whisky distillery	10%	15%	38%	35%
Went on a food or drink trail	1%	0%	2%	3%
None of these	5%	3%	2%	1%
BASE	459	875	948	717

Trying Local Food:

USA 86%

Trying Local Drinks:

Australia 77% Germany 75% France 74%

Visit to Whisky Distillery:

Germany 50% France 44% Netherlands 41%

Night out/Visit to a Pub:

Australia 61% USA 59%

Which of the following did you experience during your holiday / short break in Scotland?
Source Scotland Visitor Survey 2015/2016

Matching expectation to experience

Research points to a 'perception gap' between the expectation and experience of Scottish food and drink by our visitors. International visitors – in particular those from Europe – have lower expectations that other markets of the Scottish food and drink experience. What does this mean?

All of our markets – Scots, the rest of the UK, Europeans and the rest of the world – found that their experience of food and drink in Scotland actually surpassed their expectations, as illustrated in the table below. In some ways, exceeding expectations is a positive reflection of our offering, but it clearly tells us that we need to work harder to raise the profile of our food and drink offering so that we raise our visitor's expectations by promoting Scotland as a destination of choice for a world-class food and drink experience.

We need to think about the food and drink images used within marketing and promotion and the stories we tell visitors and potential visitors - are there ways we can surprise the visitor with our food and drink stories?

Expectation v Experience of Quality of Food in Scotland

	SCOTS RESIDENTS	REST OF UK RESIDENTS	EUROPEANS	LONG HAUL
Expectation	7.8	7.4	6.0	6.6
Experience	8.3	7.9	7.3	8.1
Difference	0.5	0.5	1.3	1.5

Thinking about the quality offered in Scotland, complete the following:
a) before my trip I expected the food to be. b) During my trip, the food I experienced was generally.
Source: Scotland Visitor Survey 2015/2016

How can we improve the visitor experience?

When we look at specific aspects of the visitor experience, the **availability of local produce** and **value for money when eating out** are rated positively, reflected in satisfaction scores of over 7 out of 10 (as rated by visitors after their holiday in Scotland).

However, compared to other aspects of the visitor experience, these two aspects appear lower down the list. Visitors were asked to rate their experiences out of 10. Scores of 7 or 8 may be positive scores but the top scores of 9 or 10 out of 10 can create genuine satisfaction and customer loyalty so we should strive to achieve this through active, focused promotion around our food and drink offerings, informed by discussion around visitor expectations and even their budgets for dining out.

SATISFACTION WITH....	MEAN SCORE	TOP 2 BOX (SCORING 9 OR 10 OUT OF 10)
Ease of getting around	8.7	62%
Being made to feel welcome in VIC	8.5	56%
Availability of useful information in VIC	8.5	52%
Service provided by staff at accommodation	8.3	49%
Value for money of attractions	8.4	51%
VIC customer service	8.4	49%
Knowledge of staff at accommodation about things to do in local area	8.3	42%
Value for money of accommodation	8.0	42%
Availability of local produce when eating out	7.5	33%
Value for money of eating out	7.5	27%
Availability of free Wi-Fi at accommodation	7.5	40%
Mobile phone signal coverage	6.9	28%
Availability of free Wi-Fi	6.7	25%
Availability of 3G / 4G	6.3	18%

Source: Scotland Visitor Survey 2015/2016

What One Improvement Would Have Enhanced Your Visitor Experience in Scotland? Suggestions from Visitors

- “Access to a fishmonger, it is easier to eat Scottish shellfish in Belgium and the Netherlands than to eat it in Scotland itself. Fish is seen as an export first and foremost, it was hard but not impossible to find it.”
- “At times it was difficult to find places to eat. Many days we were trying to find a place to eat dinner around 7pm and struggled to find restaurants or pubs that were still serving food.”
- “Better food availability. We were disappointed by the limited range of places to eat given that we were in sparsely populated areas. Even ‘quality’ hotels/ restaurants seemed to offer rather bland food unfortunately.”
- “Greater access to local food/fresh produce.”
- “Eating out in the middle of the day not always available across the board . Many places still serving lunch over a restricted period. Due to relatively short season in some areas it seems bizarre to have restrictions such as noon till two pm to order food.”
- “Cask conditioned ale in more hotels.”
- “Better value for money eating establishments that offered more than burgers.”
- “Better local food availability that doesn’t cost an arm and a leg; more choice outside the inevitable restaurant chains; less expensive; better coffee.”

Source: Quotes taken from Scotland Visitor Survey 2015/2016

A MENU OF FOODIE FACTS

Visitors spend around **£995 million** on eating and drinking when they're on holiday in Scotland with UK tourists accounting for **£656 million** and overseas tourists accounting for **£339 million**.

When on holiday in Scotland, **43%** of our visitors speak to the locals to guide and influence their choice of places to eat out. Accommodation providers are also used to help choose places to eat (**25%** sought personal advice from their accommodation provider, **13%** used the accommoation room pack and **9%** used other leaflets at the accommodation).

Visitors believe that trying local food is now an integral part of the visitor experience with **26%** of visitors agreeing strongly (scoring 10 out of 10) and **78%** of visitors agreeing (scoring 7 out of 10) with the statement: 'When on holiday I really like to find out about the local food and dishes unique to the destination'.

8% of our visitors said that the reputation of a restaurant with regard to the quality of its food was a factor in choosing their accommodation.

Around **20% of tourist spend** goes on food and drink, after accommodation and travel costs have been taken into account.

Local food and drink has particular appeal to **overseas visitors** with long haul guests more likely to try local food than UK and European guests.

The average mean score for **availability of local produce** was 7.5 and **value for money when eating out** was 7.5. Although these are positive scores, they sit lower down the visitor satisfaction table than other aspects of their holiday such as local knowledge or value for money of accommodation.

Satisfaction around food and drink is high amongst our visitors, with a gap between expectation and experience – especially among international visitors – which illustrates that the **experiences we deliver are in excess of the expectations** of our guests.

Our visitors engage in a wide variety of food and drink related activities when they stay in Scotland with **55% trying local food** and **46% trying local drink**. Dining out in restaurants, cafes and pubs topped the list of visitor activities at **92%**.

Tapping Into Consumer Trends

There's no doubt that here, in Scotland, we are ideally positioned to push our food and drink offering further up the visitor agenda. Not only do we have a rich natural larder to harvest, but the research we've already highlighted in this paper shows that our guests' experience of food and drink consistently outweighs their expectation.

The tourism and hospitality sectors are increasingly sensitive to consumer trends and economic conditions. VisitScotland's 2017 tourism trends "Capital Investment – For Anyone to Realise Their Tourism Potential", identifies the development of non traditional businesses entering the visitor attraction market, linked to the fascination of visitors on the development of products. Food and drink provides a great opportunity for diversification. Examples include tours of breweries and links to farmers (pay to plough fields/ learn old traditional skills) and agri-tourism.

Other opportunities exist mixing heritage and gastronomy, eg linking castles with food production, accommodation providers diversifying via drinks production (gin, wine, craft ale) or honey production, accommodation offering yoga and food retreats.

TAPPING INTO CONSUMER TRENDS: Global market intelligence agency Mintel (2016) identified a number of specific trends in the food and drink industry that are highly relevant to the ways in which we package and promote our food and drink offering for visitors. These include using natural ingredients, focusing on health and wellbeing, promoting authenticity and provenance, and removing the stigma of 'solo dining'. Can you apply this to your products or service?

ARTIFICIAL: Consumer demands for natural and 'less processed' food and drink are forcing companies to remove artificial ingredients.

FROM THE INSIDE OUT: Consumers are recognising that diets can connect with the way they look and feel. This places new emphasis on packaged products that are formulated to help people's physical appearance as well as their personal wellness.

BASED ON A TRUE STORY: Consumers have been romanced by product origin, ingredients or inspiration stories. With similar claims made by legitimately hand-crafted as well as mass-produced products, this proliferation and occasional propagation will find consumers and regulators alike seeking products with verified claims.

TABLE FOR ONE: Across age groups, more consumers are living in single-person households or occasionally eating meals alone. These meals for one require right-sized products and packaging as well as promotions that further erode any stigma of dining solo.

(Source: Mintel Global Food & Drink Trends 2016 www.mintel.com)

To view case studies of key food hubs from around the world, please view VisitBritains research into food hub destinations (Catalonia, Melbourne, Flanders, Tasmania, Nova Scotia, and Basque Country). www.visitbritain.org/inbound-food-drink-research

Seeking **accreditation**

Have you considered the VisitScotland 'Taste our Best' accreditation? This recognises and celebrates businesses that provide and promote a quality Scottish food and drink experience. Over 1,000 businesses have achieved Taste Our Best with the scheme, recognised as a industry accreditation for both quality and provenance.

For more information on Taste Our Best go to www.visitscotland.org

Case Study 1: Food-loving Culturalists

At VisitScotland, we've developed a segmentation model of the UK market that includes the target segment 'Food-loving Culturalists'. Food is definitely a passion for this group and although it might not be the driving force behind their destination choice, it will certainly be a key aspect of their holiday and one of the ways in which they measure – and remember – their experience of Scotland.

Our model suggests that 1.6 million UK households can be grouped in the Food-loving Culturalists segment and that they exhibit the following typical characteristics:

- Affluent, typically (71%) 25-54 and living predominantly in England and Scotland (25% in London, 21% in the North, 15% in Scotland)
- Above average holiday-takers and the highest spenders on annual holiday nights of all the segments in our model
- Spend over half of their holiday nights abroad, with their UK nights away featuring short breaks and, in particular, city-based breaks. Competition for their holiday nights is very strong
- Seek great food and drink experiences, fascinating history and culture, breath-taking scenery and landscapes and vibrant city life
- Cultural events, special exhibitions and openings can appeal
- Use top-end hotel and B&B accommodation and find quality, value-added and exclusive experiences appealing
- Embrace mobile and new technology and in particular are high users of travel review sites.

At VisitScotland, we use segmentation as a tool to guide our marketing to the wider UK population so the above insights are critical to the way we inform our marketing messages and organise the communications required for this segment.

Case Study 2:
Scotland's Year of Food and Drink 2015

YEAR OF FOOD & DRINK SCOTLAND 2015

Scotland's rich, natural larder was thrown open and showcased throughout 2015 in an exciting year of food and drink related events and activities for both the people of Scotland and our visitors to enjoy. A Scottish Government initiative, led by VisitScotland, it was supported by industry leadership group Scotland Food & Drink and a range of other partners.

Over one million people attended 215 Year of Food and Drink supported or partnered events and festivals, where 1,008 local and Scottish producers showcased their produce. Scotland's natural larder featured in a dedicated TV advertisement, reaching approximately 18.7 million people.

Appendix:
Sources and their interpretation

The following sources were used in the development of this Topic Paper:

Scotland Visitor Survey 2015 & 2016 (Jump Research on behalf of VisitScotland)
www.visitscotland.org/research_and_statistics/visitor_research/visitor_surveys/scotland_visitor_survey.aspx

Whisky Tourism – Facts and Figures, March 2015 (VisitScotland Insights Topic Paper)

The Growth of Craft Beer & the Scottish Tourism Industry: How Your Business Can Benefit

Foresight Issue 129 What Inbound Visitors Shop For in Britain July 2014, VisitBritain
www.visitbritain.org

And the following interpretation applied:

Scotland Visitor Survey 2015 and 2016

- The Scotland Visitor Survey is designed to understand visitor attitudes and behaviours across a range of measures.
- The Scotland Visitor Survey is undertaken during high season only, based on a need to gather visitor views in an efficient manner. This means the results reflect the views of those visiting Scotland between May and September only.
- The sample comprises leisure overnight visitors only and, as such, the following groups are excluded: visitors on a day trip from home, those on a business trip, cruise ship visitors.

VisitScotland YouGov Omnibus 2014

- This survey was conducted by YouGov on behalf of VisitScotland to investigate attitudes and behaviors surrounding food and drink on holiday. This survey also investigates particular perceptions of food and drink available to holiday-makers visiting Scotland.
- Fieldwork was undertaken between 8 and 9 December 2014. The survey questions were asked of a nationally representative sample of n= 2,175 UK adults aged 18+. This survey was conducted online.

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