



## Accessing and Serving the Tourism Market



## Overview

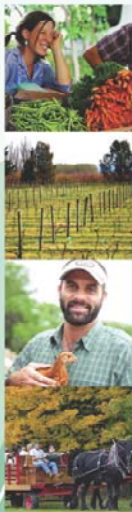
- Understand tourist motivations and preferences
- Compare food tourist types by food interest levels
- Examine the western tourism market and tourist preferences
- Evaluate food tourism promotional options






## Tourists

- Tourists seek experiences based on local identity and culture
- Studies show that tourists travel to those destinations that have established a reputation as a place to experiment with quality local products
- The Mediterranean diet was included in UNESCO's list of Intangible Cultural Heritage of Humanity



## Tourist Preferences

- Tourist food preferences can vary based on...
  - Destination
  - Seasonality
  - Tourist type
  - Visitor nationality
- Food tourists are considered cultural tourists
  - Educated consumerism
  - An openness to new experiences
  - Desire for lifelong learning
  - Independent travel
  - High expectations





## Tourist Preferences

- Some tourists treat food consumption as part of the travel experience
- Some tourists use food as a basis for their activities
- Some tourists use food to select the destination itself
- Food choices can be motivated by...
  - Cultural experience
  - Interpersonal relations
  - Excitement
  - Sensory appeal
  - Health concerns



## Food Consumer Types

- Neophile
  - More likely to try something new on the menu, something that may not be available at home
- Neophobe
  - Less likely to be as adventurous in their diet

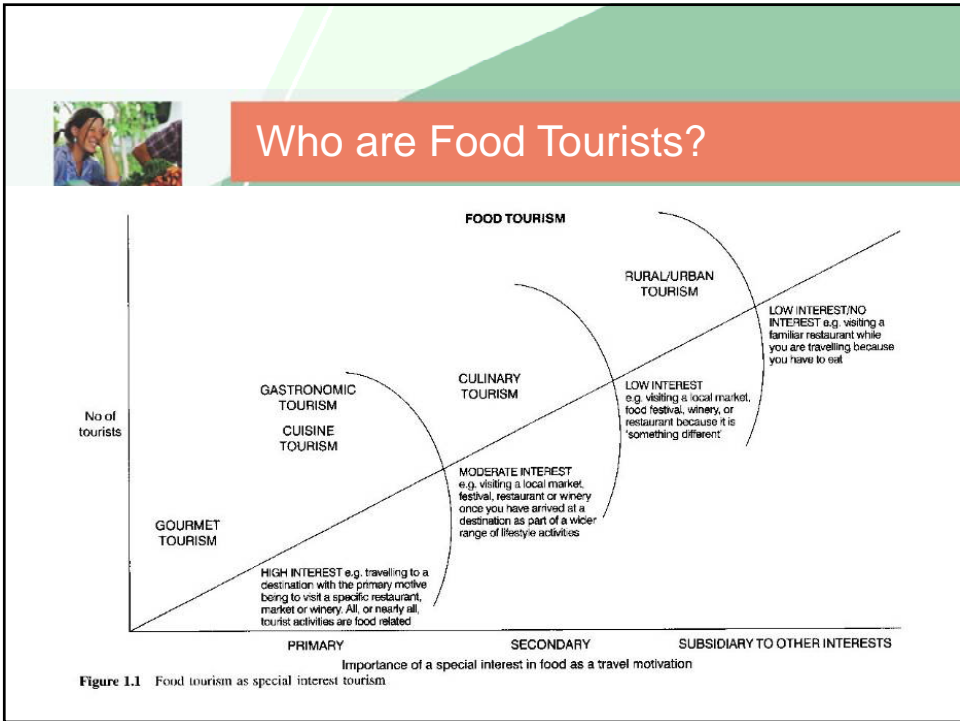


## Food Tourists



- Four categories of food tourist based on the level of interest and involvement in local food at destination
  - Gastronomes (high interest/involvement in food)
  - Indigenous foodies (high and moderate interest/involvement)
  - Tourist foodies (moderate and low interest/involvement)
  - Familiar foodies (low interest/involvement)



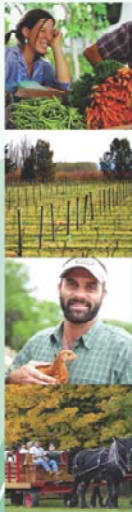





## Foodies and Food Tourism


- A foodie is defined as a person with “a long-standing passion for eating and learning about food but who are not food professionals”
- May choose to travel specifically to experience new foods
- May be well educated on food, but often just have an interest and enthusiasm for learning about food
- They may have high standards for food quality, but may not require expensive or gourmet style foods
- Frequent food related festivals and events
  - Motivation to visit, accomodations and local restaurants

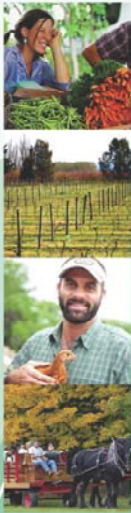


## Barr and Levy's Foodie Types



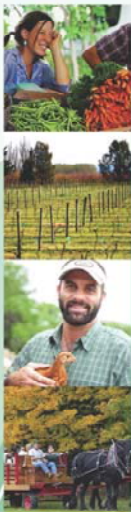
Foodie Type	Description
Whole-Foodier Than Thou	Uses only organic methods growing their own produce and flowers, slaughters their own meat, uses simple ingredients in their cooking.
Squalor Scholar Cook	Does their research and knows the history of their favorite foods and recipes, sticks to traditional recipes, has the academic and historical knowledge of food to set them apart from others.
Made in Paris	Starts off learning basic cooking techniques in small restaurants and manages to move themselves up the ranks through their connections to make a living cooking in Paris, a foodie mecca.
Paris C'est un Dump	Ultimate upscale foodie that spends much of their time in expensive restaurants, subscribes to important food magazines, and is extremely picky.
Gorgeous East in Me	Drawn to ethnic and foreign foods, constantly wants to try new things and experience new cultures through food.
Foodies on Ice	Regards food as artistic material, aims to impress by creating ice sculptures, elaborately decorated cakes, or butter statues.
All-American	Small-town foodie that searches out local food and ingredients that deserve attention, constantly attempts to improve their crops and create new dishes.







## Examples

- The motivations of culinary tourists in Córdoba (Spain)
  - Only 10% chose food as one of the main reasons for visiting the city
  - 68% believe that local cuisine is an important, but not an essential aspect of their visit
  - 22% view it as secondary
- (Sánchez-Cañizares and López-Guzmán, 2012)

## Examples

- Domestic visitors to the Lake District of England were most interested in trying foods that were different from the products regularly consumed at home (Sims, 2010)
- American tourists in China began the trip with a high level of interest in local food, but desired more familiar foods over the travel duration (Ostberg and Bengtsson, 2010)



## Examples

- Remington and Yuskel (1998) showed that food was the fourth most important variable contributing to the satisfaction of tourists in New Zealand
- Enright and Newton (2005) found that food was one of the most important factors in Southeast Asian city visitors
- Quan and Wang (2004) argue that the importance of food remains undistinguishable for tourists
  - Peak touristic experience (where food is a major motivation for tourism)
  - Supporting consumer experience (where food satisfies a basic need)

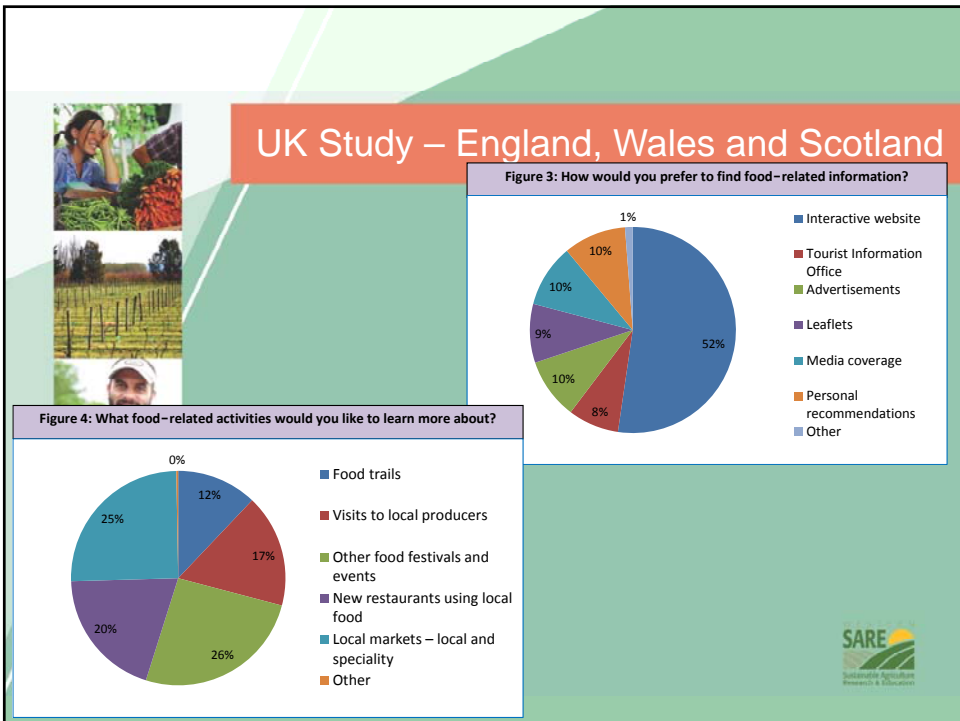
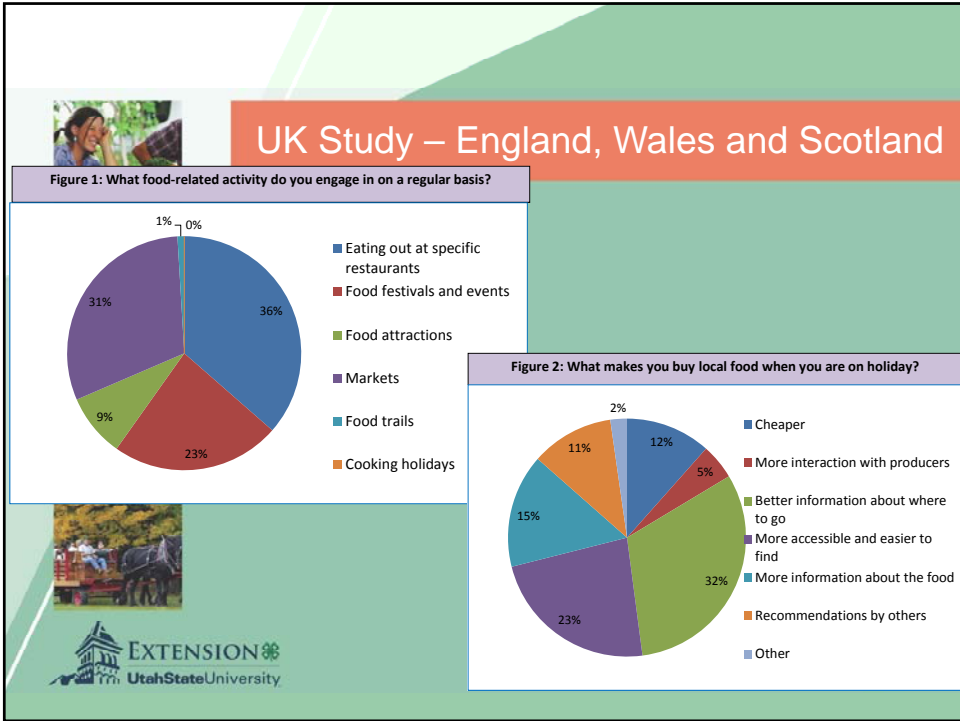




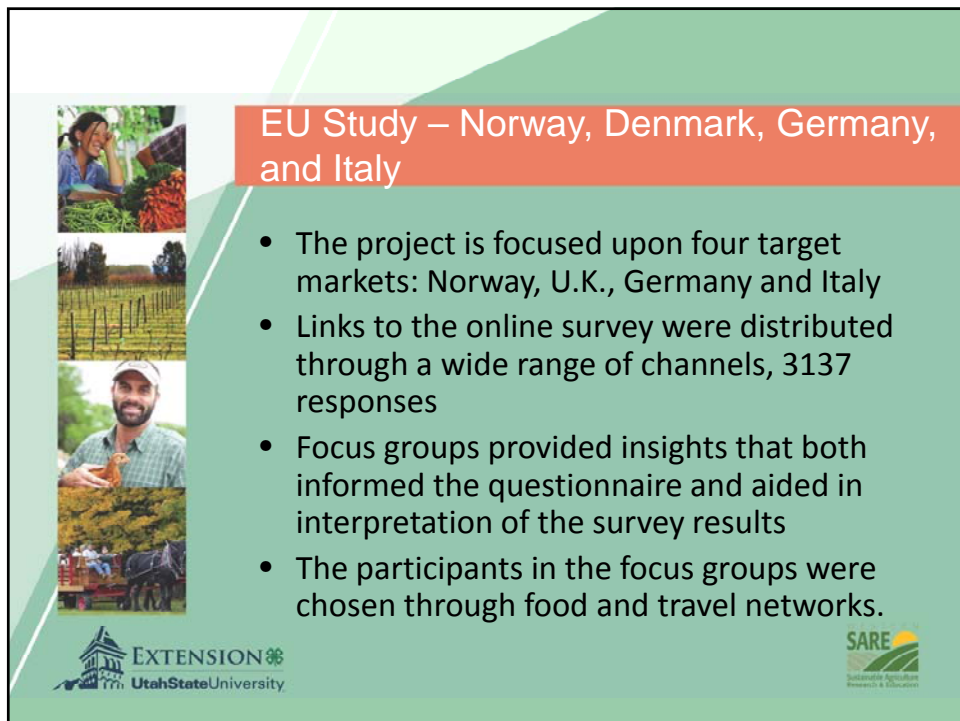
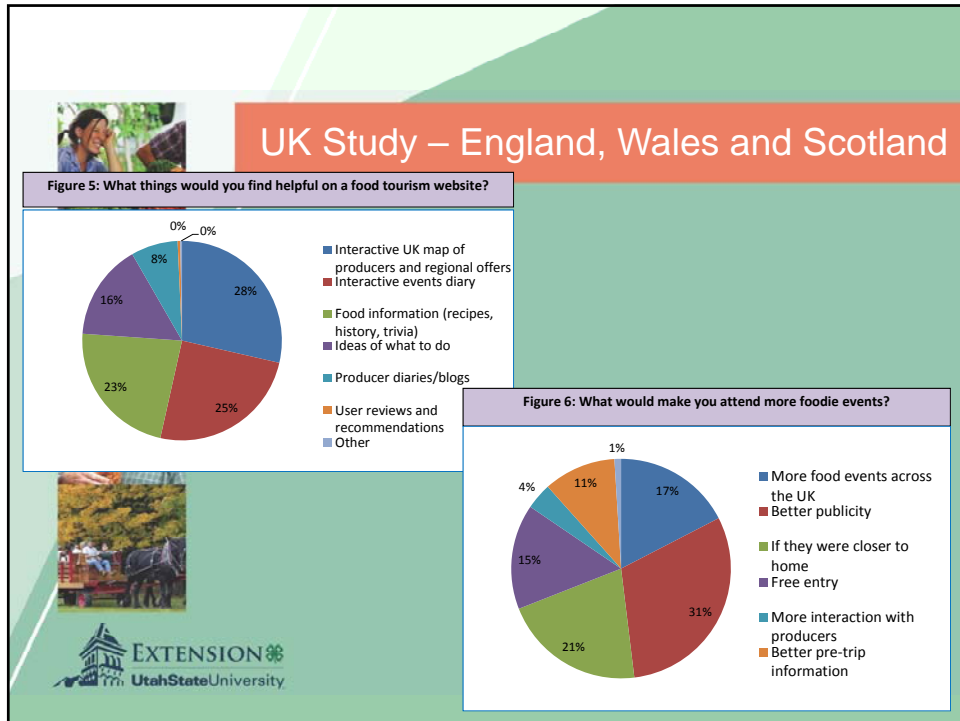
## UK Study – England, Wales and Scotland

- 267 tourist surveys were collected at three regional food festivals around the UK during the autumn of 2009
  - Abergavenny Food Festival, the Stratford Festival, and the East Midlands Food Festival
- 16 interviews were conducted via telephone between 24 March and 15 April, 2010, with food tourism organizations across the United Kingdom
- Five workshops were help to disseminate information directly to UK-based food tourism providers





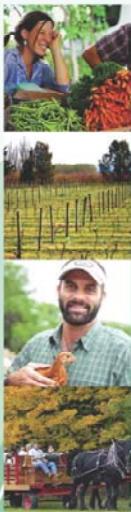




## EU Study – Norway, Denmark, Germany, and Italy



- Foodies who have already travelled internationally for a food-related experience constituted 39% of the total respondents
- Many foodies work in, or have been employed in food, hospitality or related occupations
- Foodies tend to be better educated and have higher incomes than the norm, and those that travel for food reasons have the highest incomes
- Food-related travel will decline with aging
- Students and the younger adults do not have the necessary income, but are potential food tourists who can be developed for the future
- Thirty-nine percent of respondents had travelled internationally for food experiences in the previous 12 months and many such trips were for planned events

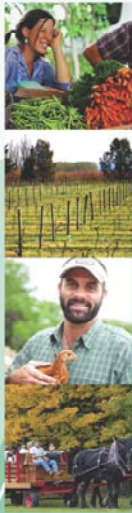




## EU Study – Norway, Denmark, Germany, and Italy



- The top willingness-to-pay activities included:
  - Enjoy regional cuisine in a local restaurant (32%), WTP=74€
  - Visit a farmer's market to buy fresh food (30%), WTP=71€
  - Take a trip to the islands and stay in a cottage (25%), WTP=98€
  - Experience a nice romantic dinner (21%), WTP=115€
  - Go hiking and view the wildlife in nature (20%), WTP=75€
  - Attend a food festival (19%), WTP=73€.



## EU Study – Norway, Denmark, Germany, and Italy

- The top five media channels consulted by all respondents:
  - Friends and relatives
  - Guide books
  - The official city/destination webpage
  - Travel magazine
  - The national tourist organization’s webpage
- The top four media channels the respondents trust the most when booking a holiday trip:
  - Friends and family
  - The official city/destination webpage
  - Guide books
  - Social ranking sites on services, like Trip Advisor

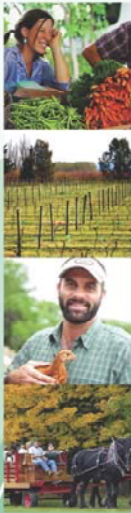





## Western Tourism Market


- Prime area for tourism development
  - 20+ national and state parks
- Idaho 2013 tourism indicators
  - 30.2 million total visitors
  - Total travel spending: \$1.4 billion
- Nevada 2012 tourism indicators
  - 52.2 million total visitors
  - 24.6 million state/national park visits
  - Total travel spending: \$58.1 billion
- Utah’s 2013 tourism indicators
  - 23.5 million total visitors
  - 4.2 million skier visits
  - Total travel spending: \$7.5 billion

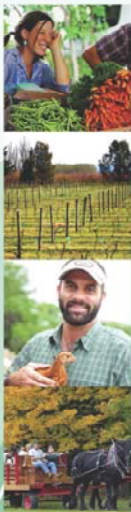


## Western Food Tourism Studies



- Colorado Agritourism Study
  - 895 survey responses 2005-2006
  - Age - 46 years on average
  - Income - 37% earned incomes over \$75,000 per year
  - Marital status - 73% of travelers were married
  - Family composition -
    - 28% were young couples, no children
    - 42% were families with children
  - 90% identified themselves as White
- Grouped respondents into five “tourist types”

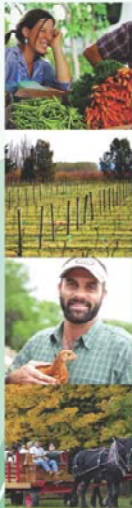




## Colorado Agritourism Study



- Group 1: The Loyal Colorado Enthusiasts made up 13% of the travelers. These visitors are parents of older children and couples who return often based on their previous agritourism experiences. They represent the largest share of participants in outdoor recreation on farms and ranches during the summer. They are most likely to camp and stay within a few hundred miles of home. Loyal Colorado Enthusiasts plan to participate in a diverse set of agritourism activities and report more visits to agritourism enterprises relative to two years earlier.
- Group 2: Family Ag Adventurers make up 17% of the survey respondents and are among the most promising agritourism visitors. This segment plans their travels around specific agritourism outings and participates in unplanned activities several times per year. This group can be defined as middle-income, often traveling with children in bigger parties. They are willing to visit local enterprises and travel long distances to reach a variety of agritourism destinations. They travel primarily in summer, but also plan trips for spring and fall, which extends the season for some agritourism operators.



## Colorado Agritourism Study

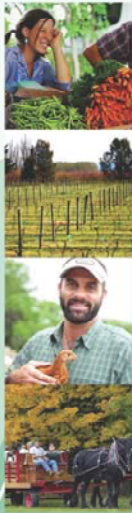
- Group 3: In-State Explorers make up 30% of the travelers analyzed. These are Coloradans who explore the state by car on short jaunts but do not make trips specifically for agritourism purposes. Most of their travel occurs in winter, fall and summer. Although this group might be hard to target directly since they don't travel with agritourism activities in mind, but do participate in unplanned activities, they travel frequently and are from upper-middle income households. Many planned to travel in the subsequent year and participate in some agritourism, so the culinary events in which they currently participate may be the best means to extend their visitation and spending into other agritourism experiences.
- Group 4: The Out-of-State Activity Seekers represent about 4% of the survey panel and comprise those visitors to Colorado who traveled the farthest, did not plan to visit again in 2007, and who were more likely to spend longer trips in hotels, resorts, second-homes or bed and breakfast accommodations. They were primarily mid- to upper-middle class individuals, traveling in smaller parties (even though they are parents), who were more likely to engage in agritourism as a secondary or unplanned activity. They enjoy participating in numerous outdoor activities, and report some of the highest interest across all agritourism activity groups. Their travel is spread more evenly across all four seasons, relative to others.


## Colorado Agritourism Study Results



- Larger groups participating in agritourism are more likely to plan their trip itinerary (and include agritourism activities) prior to travel)
- Groups used local and business websites (not national websites) to plan their holiday
- Tourists attracted to an area by its natural amenities tend to participate in agritourism activities in these areas
- Need to link marketing for agritourism enterprises to natural parks, forests and recreation areas, such as representing them in park brochures and at visitor centers
- Private enterprises should describe the natural aspects of their operations in their marketing materials



## Western Food Tourism Studies


- Utah Food Tourism Study
  - 692 in-person surveys conducted 2013-2014
  - 7 collection sites at gateway stops, national parks, and visitors centers
  - Demographics
    - 68% married
    - 52% male
    - College degree 31%, graduate degree 40%
    - 49% full time employed, 29% retired
    - 84% White, 5% Asian, 4% Hispanic
    - Average income 2012 \$103,000
    - Average age 50 years
    - Length of stay 10.6 days
    - 2.9 adults and 1.6 children in party








## Travel Specifics

- Travel reason
  - Business 1%
  - Visiting family/friends 5%
  - Visiting national parks 9%
  - Outdoor activities 43%
  - Visiting cultural/heritage sites 24%
  - Special events/festivals 2%
  - Agritourism activities 9%
  - Passing through 6%
- Research/booking resources
  - Internet/website 41%
  - Brochure/booklet 10%
  - Recommendation from family/friend 3%
  - Tradition 32%
  - Other 14%
- Final destination
  - Border State (AZ, NM, CO, ID, NV) 33%
  - California 16%
  - Las Vegas 17%
  - Yellowstone 9%
  - Other 24%





   	Utah Destination Perceptions	
Statement	Rating Scale of 1-5 (Strongly disagree to Strongly agree)	
Utah is known for its outdoor activities (skiing, hiking):	4.48(0.69)	
Utah is known for its landscapes (National Parks, wilderness):	4.63(0.61)	
Utah is known for its heritage and culture:	3.86(0.89)	
I am interested in learning more about Native American culture:	3.65(1.00)	
I am interested in learning more about Mormon culture:	2.73(1.27)	
Utah has a strong food culture:	2.94(0.79)	
The food I have eaten in Utah is good:	3.89(0.74)	
Local food is well advertised in Utah:	2.94(0.87)	
I have seen food advertised as "Utah's Own" or "Local First Utah":	2.50(1.07)	
Community-based attractions are well advertised in Utah:	3.35(0.93)	
Locally produced crafts were readily available in tourist shops:	3.36(0.89)	
I feel I have an understanding of Utah culture:	3.16(0.96)	
I had enough time to see and do everything I wanted while in Utah:	2.79(1.21)	
I am planning to return to Utah:	4.10(0.89)	
I will recommend Utah as a travel destination to my family and friends:	4.43(0.69)	




   	Food Interests	
	<ul style="list-style-type: none"> <li>• Organization membership (18%)                             <ul style="list-style-type: none"> <li>▪ Slow Food = 10%</li> <li>▪ Dining Club = 11%</li> <li>▪ Coop Grocer = 22%</li> <li>▪ Wine/Beer Club = 27%</li> <li>▪ Cooking Club = 8%</li> <li>▪ CSA = 15%</li> <li>▪ Other = 7%</li> </ul> </li> <li>• Dietary restrictions                             <ul style="list-style-type: none"> <li>▪ Yes 15%</li> </ul> </li> </ul>	







## Food Related Activities At Home and While Traveling

<b>At Home</b>		<b>Traveling</b>	
Buy locally sourced food:	3.52(1.16)	Buy locally sourced food:	2.80(1.19)
Shop at farmer's markets:	3.08(1.14)	Shop at farmer's markets:	2.46(1.16)
Participate in a CSA:	1.73(1.11)	Visit local farms:	1.77(0.95)
Buy organic certified produce:	2.79(1.19)	Spend the night at local farms:	1.28(0.65)
Visit local farms:	2.05(1.14)	Participate in agritourism:	1.60(0.88)
Cook at home:	4.29(0.80)	Cook at accommodations:	2.82(1.31)
Try new food items or recipes:	3.86(0.91)	Try new food items or recipes:	3.48(1.06)
Buy food you don't recognize:	2.93(1.19)	Try local recipes:	3.12(1.19)
Eat ethnic foods:	3.57(1.05)	Buy food items as souvenirs or gifts:	2.72(1.13)
Attend beer/wine festivals:	2.39(1.27)	Seek out local sourcing restaurants:	2.97(1.23)
Food canning:	1.80(1.11)	Attend beer/wine festivals:	2.22(1.28)
Beer/wine making:	1.35(0.88)	Recycle:	3.67(1.33)
Home gardening:	2.62(1.50)	Other:	2.38(1.77)
Composting:	2.14(1.49)		
Recycling:	4.35(1.07)		
Other:	3.75(1.89)		



Rating scale of 1-5 (Never to Always)





## Results Overview

- Utah is known for its landscapes and outdoor activities
- Utah is not known for its food culture or local foods
- While food related activities and events are available, local food is not visible in Utah
  - The majority of tourists were not familiar with Utah's Own or Local First Utah
- Tourist participation in food related activities were more prevalent at home
- Tourists to Utah have the potential to be Indigenous Foodies (high and moderate interest/involvement) based on their at-home food practices
- Internet based promotion most useful with tourists
- Target market married, highly educated, higher income, with older children





## Tourism Promotion Options

- Tourism marketing options
  - Websites
    - State/regional tourism, local food, trip/vacation booking
  - Tourism publications
    - Local, national, international
  - Heritage trail maps
  - Visitor centers
  - Attraction publications
    - Parks, resorts, etc.





## Tourism Promotion Options

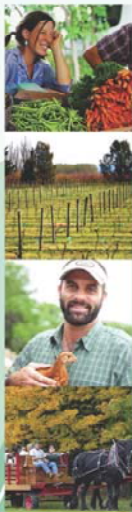
- Fliers in Tourist Information Centers (TIC) can help you to reach your customers
  - Know how your tourists arrive (major hubs/airports). Use those TICs
  - Your local TIC is the best start
  - Las Vegas Visitor Information Center
  - Greater Las Vegas Visitor Center (Laughlin)
  - Nevada Welcome Centers (Boulder City, Mesquite, Wendover)
  - Utah Welcome Centers (Brigham City, Echo, Salt Lake City, Jensen, Thompson Springs, St. George)








## Promotional Resources

State	Organization	Type	Contact
Idaho	Idaho Preferred	Local food	idahopreferred.com
	Visit Idaho	Tourism	www.visitidaho.org
	Idaho Travel Guide	Tourism	www.idahobeautiful.com
Nevada	Nevada Grown	Local food	nevadagrown.com
	Grow your Own	Local food	growyourownnevada.com
	Nevada Tourism Department	Tourism	www.travelnevada.com
Utah	Utah's Own	Local food	utahsown.com
	Local First Utah	Local food	localfirst.org
	Utah Tourism Department	Tourism	www.utah.com
National	Slow Food	Local food	slowfoodutah.com
	Agritourism World	Local food	www.agritourismworld.com
	Brand USA	Tourism	www.thebrandusa.com
	Discover America	Tourism	http://www.discoveramerica.com

## Activity

- Worksheet 3.1: Customer Segmentation
- For each food tourism enterprise or product define the target consumer (tourist)
- List what needs and preferences they have regarding your activities/products



## Activity

- Worksheet 3.2: Promotion Plan
- For each food tourism enterprise or product define a tourism focused promotional strategy



# Thank you!

