

Street Food Tour & Tasting – With a food expert to guide you



EXPERIENCE DASHBOARDS

A guide to using these dashboards and the data they contain

DEF Experiences Research 2018/19

Online survey in UK & 10 leading inbound markets
Fieldwork January/February 2019

- 1000 interviews in each country (Norway/Sweden – 500 in each)
- All sample non-rejectors of holiday travel to England
- **UK** – leisure breaks of 2+ nights in England
- **Australia, China, US** – Long-haul leisure travellers
- **Germany, Spain, France, Italy, Netherlands, Norway, Sweden** – Short-haul leisure travellers

Learning from the exploratory qualitative research in Germany, Australia and US in Q4 2018 also included where applicable

Experience Dashboards

Individual dashboards for each of the 24 experiences tested
Each dashboard provides

- insight into the appeal of the experience in England
- details of traveller behaviour with regard to the experience's influence on holiday decisions, the booking process, accommodation preferences and journey times
- An assessment of the opportunities and threats to the development of the experience in England for both the domestic and inbound markets

Learning from the individual experiences tested can be applied to other similar experiences that may be developed

Key Metrics Included



The ranks show on each page and in the summary table are based on the overall level of interest (done in the past, booked to do and interested in doing in future) compared to the other 23 experiences tested

The **'Share of Inbound Volume'** percentage is based on those interested in the experience in England as a percentage of the total volume of holiday visitors from each country visiting England in 2017 (source: IPS). The percentage shown is based on the total of the 10 inbound markets included within this research

EXPERIENCE SCORECARD

The **Experience Scorecard** shows how the experience performs on the key attributes that impact the potential for experience in England.

England Appeal – the level of interest in the experience in England

Experience Maturity – the extent to which the experience is established as a holiday leisure activity

Authentic/Unique - elements of the experience that increase its appeal and value to tourism in England

History/Culture – the extent to which the experience connects with England's heritage. The importance of this attribute will vary by experience type

Influence on holiday decision – highlighting whether the experience will drive decisions or if it is seen primarily as an 'add-on' activity

	Star rating – low to high
 England Appeal	★★★★☆
 Experience Maturity	★★★☆☆
 Authentic / Unique	★★★★☆
 History / Culture	★★★★☆
 Influence on holiday decision	★★★★☆

STREET FOOD TOUR & TASTING: SUMMARY

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EXPERIENCE SCORECARD METRICS*

Star rating – low to high

	England Appeal	★ ★ ☆ ☆ ☆
	Experience Maturity	★ ★ ★ ★ ☆
	Authentic / Unique	★ ★ ★ ☆ ☆
	History / Culture	★ ★ ☆ ☆ ☆
	Influence on holiday decision	★ ☆ ☆ ☆ ☆

DEMOGRAPHIC SKEWS

- Broad appeal across all demographics
- + BuzzSeekers, Adventurers (Inbound)
- + Couples, friends, with children

Similar High Interest, Established Experiences (included in the research)

- Experience 'Life behind the scenes'
- Distillery or brewery experience
- Guided nature experience
- Spa experience
- Vineyard tour & tasting

* See next slide for metrics used to define scorecard metrics



Qualitative / Quantitative Combined Summary
Source: Experiences Research 2019



ENGLAND APPEAL

- **Eating local food is recognised as a fun and important part of holiday experience.** It is seen as a way to experience more of the local culture



CHALLENGES

- **Not seen as guided.** Some felt a guide was unnecessary and the activity could be done easily on own. Questioned if a guide could add value to experience, a minority suggested they could tell historical stories about food which could make it more authentic.
- **No country owns it as seen as a way to experience culture,** though Asia is seen as an main destination for street food
- The domestic market currently sees it as something they would do in other countries, so the **focus may be on inbound markets**



OPPORTUNITIES

- To offer **multi-cultural English food** and/or **specific regional foods**
- Alongside the food tasting, **other relevant experiences** can be promoted; such as cheese making, vineyard or distillery tours etc. to create a food and drink themed itinerary
- Currently seen as an **urban experience**, alongside city life and shopping. Providing similar experiences in regional towns and cities can increase the potential



STREET FOOD TOUR & TASTING: SCORECARD METRICS

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ENGLAND APPEAL / MATURITY	% Interest in doing experience in England	Ranking out of 24 experiences	Share of inbound Volume*
UK (Domestic)	70%	4	
<i>All Inbound Markets</i>	67%	3	100%
Australia	67%	3	6%
China	88%	1	3%
Germany	59%	4	15%
Spain	73%	1	13%
France	59%	5	17%
Italy	70%	2	10%
Netherlands	44%	4	6%
Norway	62%	3	3%
Sweden	58%	2	4%
United States	80%	1	24%

* Based on IPS 2017 FY data

ENGLAND APPEAL / MATURITY – PULL OF COMPETITOR DESTINATIONS

	Inbound	UK
More likely to book in another country	18% ↓	18% ↑
Other countries have better experiences	16% ↓	19% ↑

N.B. Lower figures for these measures are good better - i.e. you want less people likely to book in another country



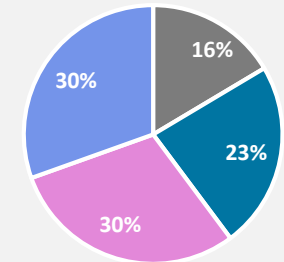
CORE COMPONENTS OF EXPERIENTIAL

Components experiential providers should emulate or amplify to encourage travellers to participate in England

	Inbound	UK
UNIQUE to England	13%	12%
AUTHENTIC to England	20% ↑	17%
Immerse in CULTURE / HISTORY	22%	12%
Create distinctive MEMORIES	29% ↑	27%
CHALLENGE - Something they can't do at home	18%	22%

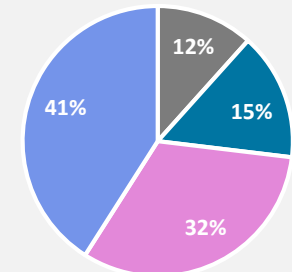
INFLUENCE ON HOLIDAY DECISION

Inbound



- Main reason
- Significant influence
- Small influence
- No influence

Domestic



↑ Significantly higher than other experiences

↓ Significantly lower than other experiences

↓ ↑ Significantly better than other experiences

↓ ↑ Significantly worse than other experiences



Source: Experiences Research 2019

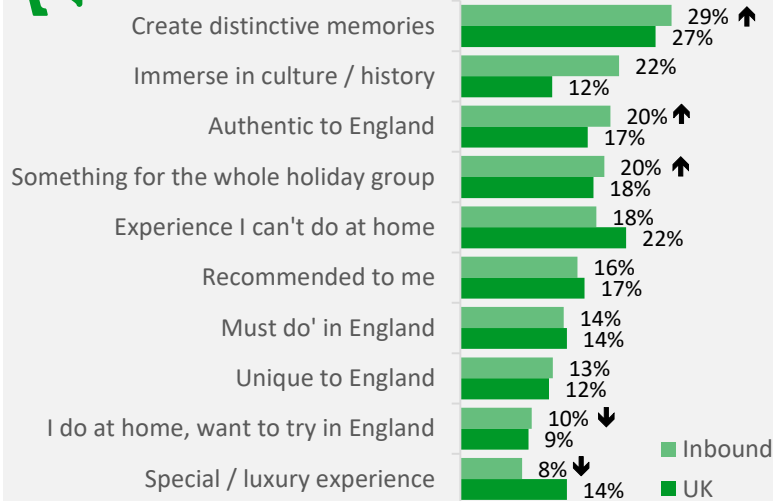


STREET FOOD TOUR & TASTING: OPTIMISING THE POTENTIAL



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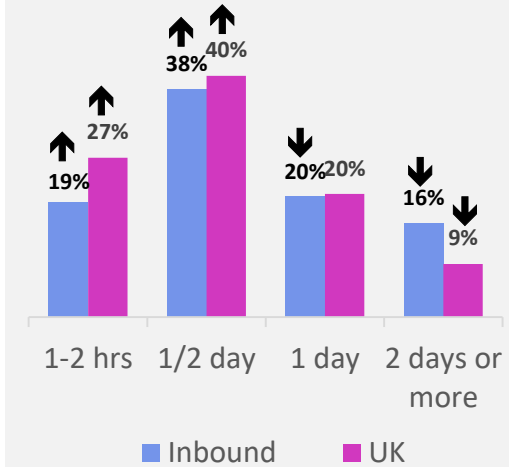
MESSAGES TO AMPLIFY



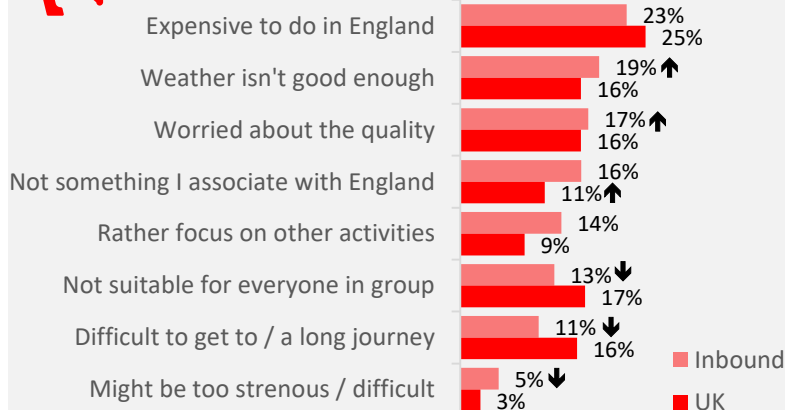
CROSS-OVER INTEREST

Inbound	UK
Cross-over activities	
Experiencing City Life – 48%	Experiencing City Life – 44%
Shopping – 40%	Shopping – 39%
Other experiences of interest	
Distillery / brewery experience – 78%	Vineyard tour & tasting – 84%
'Life behind the scenes' – 78%	Distillery or brewery experience – 83%

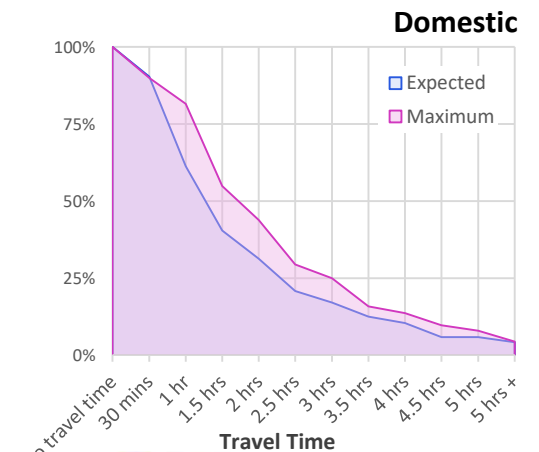
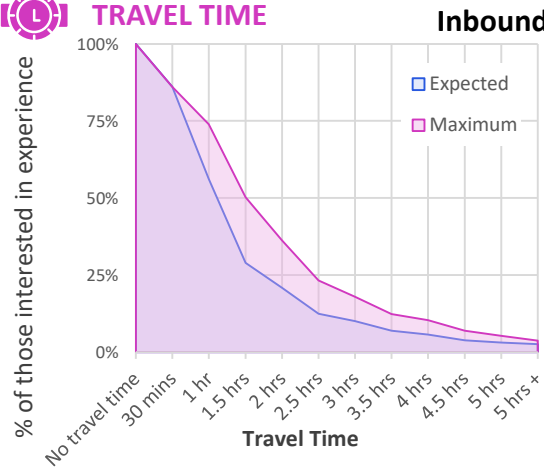
EXPERIENCE DURATION



BARRIERS TO ADDRESS



TRAVEL TIME



STREET FOOD TOUR & TASTING: BOOKING BEHAVIOURS

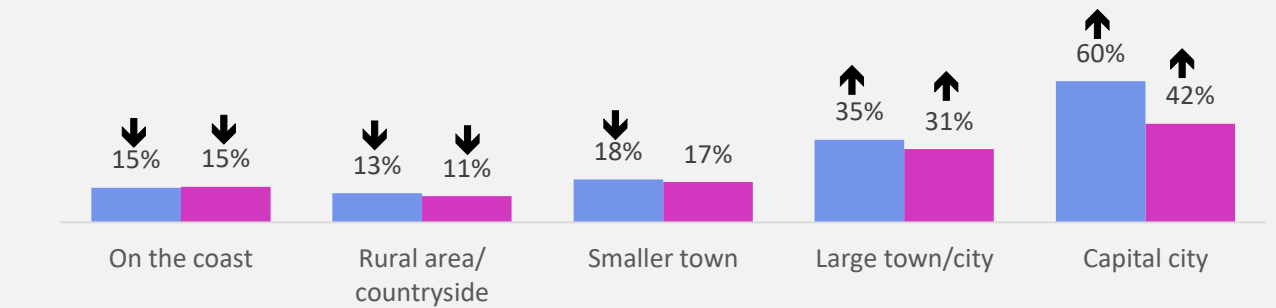
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RESEARCH CHANNELS

	Inbound	UK
General internet search	40% ↑	51%
Traveller Review Site	34% ↑	30%
Travel Guidebook	26%	23%

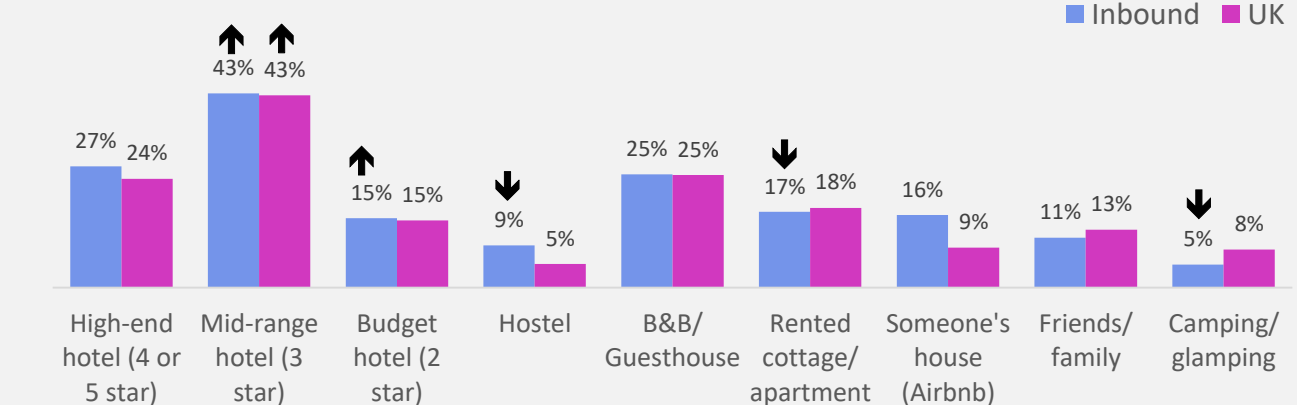
LOCATION TYPE



BOOKING METHOD

	Inbound	UK
Booked before leaving home	46% ↓	53% ↓
Booked in destination	38% ↑	27%

ACCOMMODATION TYPE



Source: Experiences Research 2019

↑ Significantly higher than other experiences

↓ Significantly lower than other experiences



STREET FOOD TOUR & TASTING: GO TO MARKET CHECKLIST

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Experience Attributes	Experience Performance	Consideration for action
Positioning as authentic and unique to England	Yes	Particularly for inbound travellers. Food is an important element of seeing the 'real' country
Current country ownership of the experience	None	Food is important in all countries though Asia is strong for true 'street food'
Provide enrichment , fun, challenge or learning	Yes	If a guided experience or combined with other learning experiences
Create distinctive memories to keep and share	Yes	An activity to be done with family and friends
Provide cultural or historical immersion	Yes	Provides insight into local cultures – national or regional
Expert-led or self-guided option	Self-guided	An expert-led option needs clear value and benefits communicated
Need to mitigate for the weather	Yes	Street food in England would need to offer indoor eating options
Established, known and understood experience	Yes	But as a self-guided activity alongside shopping and experiencing city life. Needs strong positioning as a more immersive, expert-led activity
Accessing the target audience	Mainstream	Opportunity to communicate experiences outside of London
Bookable product	Potential	Not currently seen as a driver of destination choice or a pre-booked activity. As an expert-led experience, more advance booking may be possible
Local promotion and in-destination bookings	Essential	Local guides and reviews will drive footfall
Acceptable journey times	Short	Seen as an activity to be done close to where staying
Fixed duration or variable length activity	Short	Typically a few hours
Packaging with other activities	Potential	Could combine well with other food and drink experiences to provide a food-themed itinerary