



Canada Culinary Positioning
Research – US Travellers

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 US travellers, culinary experiences and products are not a key driver of long-haul travel in general, but they are a key driver of travel to Canada.

This presents an opportunity for Canada to better understand what is resonating well in the US market with its current culinary offerings, and how it could be positioned in order to entice more 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 US long-haul travellers, culinary-related activities stand out as a top leisure travel activity. They are also a strong driver of travel to Canada, despite not being an important driver for travel in general. In other words, Canada's culinary offerings stand out as a reason why US travellers want to visit Canada. As the US is Canada's largest source market for international visitors, accounting for close to 70% of annual international arrivals, it was chosen as an important market to better understand Canada's culinary appeal.

Part 2: Qualitative deep dive

Destination Canada engaged the market research firm Ipsos to conduct a qualitative online discussion with US travellers, which took place from June 13-15, 2017. Participants were based in Destination Canada's target cities, across the Border region, Near Border region, and Southern region. The following screening criteria were used when recruiting participants for this discussion:

- Mix of age groups ranging from 21 to 63, even gender split
- Mix of past visitors to Canada and those who are considering Canada for vacation 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, 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=501 US 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 American Travellers?

To US travellers, food and drink are linked to the culture of a place, its people and a way to immerse oneself, though not all US travellers are interested in the local history and evolution of cuisines.

Whether they consider themselves foodies or not, the atmosphere and overall experience around food & drinks factor heavily on travellers' expectations and enjoyment of a dining experience. American travellers like to see a balance between a great meal, good prices, and great experiences.

'Living like a local' is how many US travellers like to experience a destination, including finding the best (insert local food or drink here) it has to offer, getting recommendations from locals, and trying 'hole in the wall' establishments off the beaten track. However, it's important that the 'best food or drink' is unique or special to the destination they're visiting.

I enjoy trying new flavors and dishes, especially if they are a part of the culture in which I am visiting, it's great to experience other cultures and their cuisines.

I LOVE trying new foods and drinks outside of the United States. I love going into restaurants that are "famous" for the area. I also find that food brings people together across cultures sitting at a bar for example is a great way to interact with locals and fellow vacationers.

What makes food great is its uniqueness to the location, as I said it enhances the traveling experience. It must have great flavor, taste great and matches with the locale and situation. It is also nice to get recommendations from locals as to what is popular... I don't have to eat at a fancy, expensive restaurant but food and beverage must complement its location.


I love local champion food and drinks, 'give me whatever is on this menu that this city makes better than anywhere else'.

While the quality of the Food & drink offered is the most important consideration (98%), American travellers also consider locals' recommendations (92%) and the atmosphere (91%) when choosing where to eat on the road.

43% said they love experiencing different foods and will try anything once.

41% said they like to experiment with some different foods within limits*.



 *compared with 13% who said they mostly stick with the familiar and 3% 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 American Travellers? (Continued)

Food is not a primary hook for selecting a travel destination. There is a spectrum of food & drink planning, from picking out a 'must-have' ahead of time, through to being more spontaneous and finding local favourites in-destination. Advance research of a destination's culinary offering is not a top-of-mind planning activity.

US travellers rely heavily on asking locals for recommendations and leveraging online reviews tools to get others' perceptions on places to go. Reviews are however taken with a grain of salt, as some are wary of paid reviewers.



85% of American travellers say online reviews are an important consideration when deciding where to eat while travelling (including 32% who say they're very important and 53% who say they're somewhat important).

I love going to restaurants that are highly rated, but also finding a hole in the wall that is authentic and good. I love having a dish that is well known or famous for that city. I don't enjoy going to a bad restaurant because it was the most convenient and we didn't have time to research if it was good or not.

Friends and family, conversations with locals, and review sites. I think these places allow for the most raw/ real answers. I especially enjoy actually talking to people and hearing about their first-hand experience in person.

I read a lot of the reviews to see if there is consistency. My trust level is 50/50. I do trust friends/family recommendations more so because they know my preferences.



Share & Search – Interacting with Social Media

Social media is not a key tool that most American travellers use to research and investigate the culinary scene at a destination. For those who do use it, using place name hashtags to try and find other foodie hashtags or foodie accounts has inspired some to try new food experiences.



Just 17% of American travellers strongly agree that they like to keep on top of food trends.

When taking food photos to share on social media or with friends and family, the trigger to taking photos is often centred on three things: local dishes/experiences, creating great memories with others, or something that exceeds expectations – be it in size, colour, flavour, health or indulgence.

I [took a] picture of the breakfast buffet at Westin Ka'anapali in Maui. The fresh fruit was so good and much of the food was sourced locally. You can especially tell with fruit and veggies.

I actually just came back from a trip to Vegas last week and my friend and I discovered this great donut place called the donut bar. I had to take a picture because that's what I always do and they look so pretty. I always take photos of my food whether traveling or at home and like to share them and look at other people's food pics so I have inspirations for future places to go and try.

Yes I search hash tags and find a foodie or two in the destination I am visiting to see the picture of different places they have gone so I can get an idea of the vibe and even message them directly if I have a question. I did this when I was in New Zealand and ended up trying a Malaysian soup that I had never had before and it was so good! I became so hooked that throughout the rest of my trip there I was always on the look out for Malaysian food. I don't follow any specific accounts, I search depending on where I am certain hash tag or food social medias.



Perceptions of Canada

Canada is not top-of-mind as a country that could deliver an exceptional culinary experience because it is not perceived to have a distinct national cuisine. US travellers expect the best culinary offerings to come from countries with distinct national cuisines which have been exported and become well-known staples in the US. However, for those who have visited Canada, these lower expectations can leave some pleasantly surprised with their Canadian culinary experiences.

US travellers awareness of Canada in general is fairly low – including geography, climate, culinary options, etc. Providing some of this context when presenting culinary content can help it resonate better with this audience; for example, “placing” fresh local ingredients by identifying the region of origin, presenting Canadian wines with images of wine country scenery, etc.

US travellers perceive Canadian food and drink to be influenced by diverse ethnicities, particularly French and American food, and nature, farming and hunting. These perceptions are largely driven by US travellers’ own experiences, those of friends/family, and stereotypes. New information presented about Canada’s food & drink culture is most believable when it is combined with what US travellers already know (or think they know) about Canada.

Really not a motivator for visiting Canada, as I cannot think of anything currently that is “uniquely” Canadian, other than Molson beer.

My general assumption is that I can find basically the same foods and drinks as I can in the US. That may not be completely true, but I firmly believe there is a significant cross-over.

Ketchup chips for sure and assorted French cuisines in Montreal. Toronto has everything we have so its about finding the best spots. I'm unclear as to what I'd find in other areas of Canada.

Very diverse because there are so many different ethnicities residing in Canada. It makes me feel pretty excited about visiting Canada. There would be lots to choose from. I don't know if Canada has its own well known identity with food, but rather it has a borrowed identity because of all the cultures and ethnicities there.



Perceptions of Canada (continued)

For these US travellers, wine is typically seen as enhancing a meal while beer is seen as a nice-to-have and typically not consumed with a meal. Visiting wineries, craft beer tours and tastings are of interest, as are various other beverage-focused experiences (e.g. a casual tour of a city's bars) when travelling. However, Canadian wines and beers and the experiences available in Canada in this regard are relatively unknown.

US travellers are especially interested in culinary products which leverage the beautiful nature and scenery that they would expect to find in Canada; for example, outdoor dining or winery tours. They are also interested in products which 'surprise and delight', as long as they are still believably Canadian.

Very fresh and catch from nature (I'm thinking the freshest fish and seafood from its many lakes and bordering the ocean) – the environment is also pristine, untouched by human civilization so it is very fresh and clean, very natural, nothing artificial at all we see in most grocery stores so it is very healthy for its consumers – makes me look forward and excited about visiting Canada soon!



American travellers express more interest in unique and social culinary experiences than in high-end meals and restaurants.

I think that the dishes would have a lot of dairy, "Farm like" staple foods, berries, and Beer!



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 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 American tourism market?

TENSION: WHAT

“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



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



When you get tired of being a tourist, come experience our culture like we do – an 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.

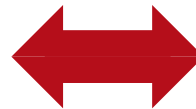
Positioning Evaluation Results

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 

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TENSION: ROLE OF CULINARY



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Recommendations

- ✓ Leverage what US travellers expect from Canada – nature and beautiful scenery, traditional symbols or recognizable brands, rural farming and fresh ingredients, ethnic diversity in cities, friendly people, etc. Including this 'old' information with new information about Canada's culinary offering acts as a guide post and encourages acceptance of new views.
- ✓ Content should highlight what is unique about Canada and its culinary offering when promoting ingredients, products or experiences that also exist in the US. While 'better' is not the right message, US travellers are open to exploring what is similar to home but also different and unique.
- ✓ 'Eating like the locals' can be a compelling message for US travellers, as they prefer to avoid 'tourist trap' food and drink experiences altogether. However, it must also be clear how the dish or culinary experience being presented is unique or special to Canada or to the particular region they're visiting.
- ✓ Messages which speak to regional or traditional dishes and ingredients are compelling. These lend comfort to travellers who want to immerse themselves in Canadian culture through food. Proceed with caution with French cuisine, as for some it can be seen as only credible in Quebec, or lacking differentiation from France.
- ✓ 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.
- ✓ Vacation should not feel like 'work' to US travellers. While some may do grocery shopping to fill the snack-gaps on holidays, most prefer a more all-in experience. Caution should be used in promoting active experiences such as cooking classes to non-foodies.



Recommendations

✓ Content should focus on the atmosphere and overall experience surrounding a meal as well as the quality of the actual food or drinks themselves, as these elements factor heavily on American travellers' expectations and enjoyment of a dining experience and can provide the "unique" aspect that they look for when travelling. For example, show a group of friends enjoying a craft beer tour rather than a pint of beer.

✓ Images of 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.

✓ Ensure content containing people incorporates diversity, socialness, and welcoming body language. These elements can increase interest by helping US travellers place themselves in the experience being presented, as well as representing a social aspect of what they would expect to find in Canada.

✓ While high-end, avant-garde cooking may not be the most effective hook for the average US traveller considering Canada as a culinary destination, leveraging the unique, high-quality ingredients and culinary products available in Canada can be effective.

✓ When promoting Canadian culinary products, consider adding detail about unbiased recommendations. US travellers are skeptical of recommendations and will likely 'fact check' by checking review sites like Yelp, for example.

✓ When crafting messaging for the US, avoid Canadian spelling and the use of acronyms that may be unfamiliar to many Americans (e.g. PEI, BC). Be careful with words that may be perceived as too high-brow (e.g. gastronomy), but also with language that may present culinary options as boring (e.g. 'safe', 'tried and true').





APPENDIX:
Quantitative Validation Results

Attitude Towards Food and Drink

■ Strongly agree
 ■ Agree
 ■ Neither agree or disagree
 ■ Disagree
 ■ Strongly disagree

I like to keep on top of emerging food trends



New question added in Pulse Check Wave 1 – no trending.
 Base: Out-of-state pleasure travelers (past 3 years or next 2 years) (n=501)
 QPC6. How much do you agree or disagree with the following statement ...?

I love experiencing different foods and am willing to try anything once



I like to experiment with some different foods but there is a limit to what I'll try



I am willing to try some different foods but mostly keep to what I am familiar with



I play it safe and only seek out foods I am familiar with



New question added in 2017 Pulse Check (Nov) – no trending.
 Base: Out-of-state pleasure travelers (past 3 years or next 2 years) (n=501)
 QPC7. Thinking about food when you are traveling, which of the following statements best describes you?

A relaxing afternoon spent touring through a beautiful and distinctly unique wine country, tasting fantastic wines with a small group



A night with friends spent wandering through an eclectic city hunting for unique hidden neighborhood bars



A four-course meal prepared by award-winning chefs, dining alfresco in a picturesque valley in the mountains



An elegant meal prepared by world class chefs in a stylish restaurant at the top of a beautiful building in the center of a cosmopolitan city

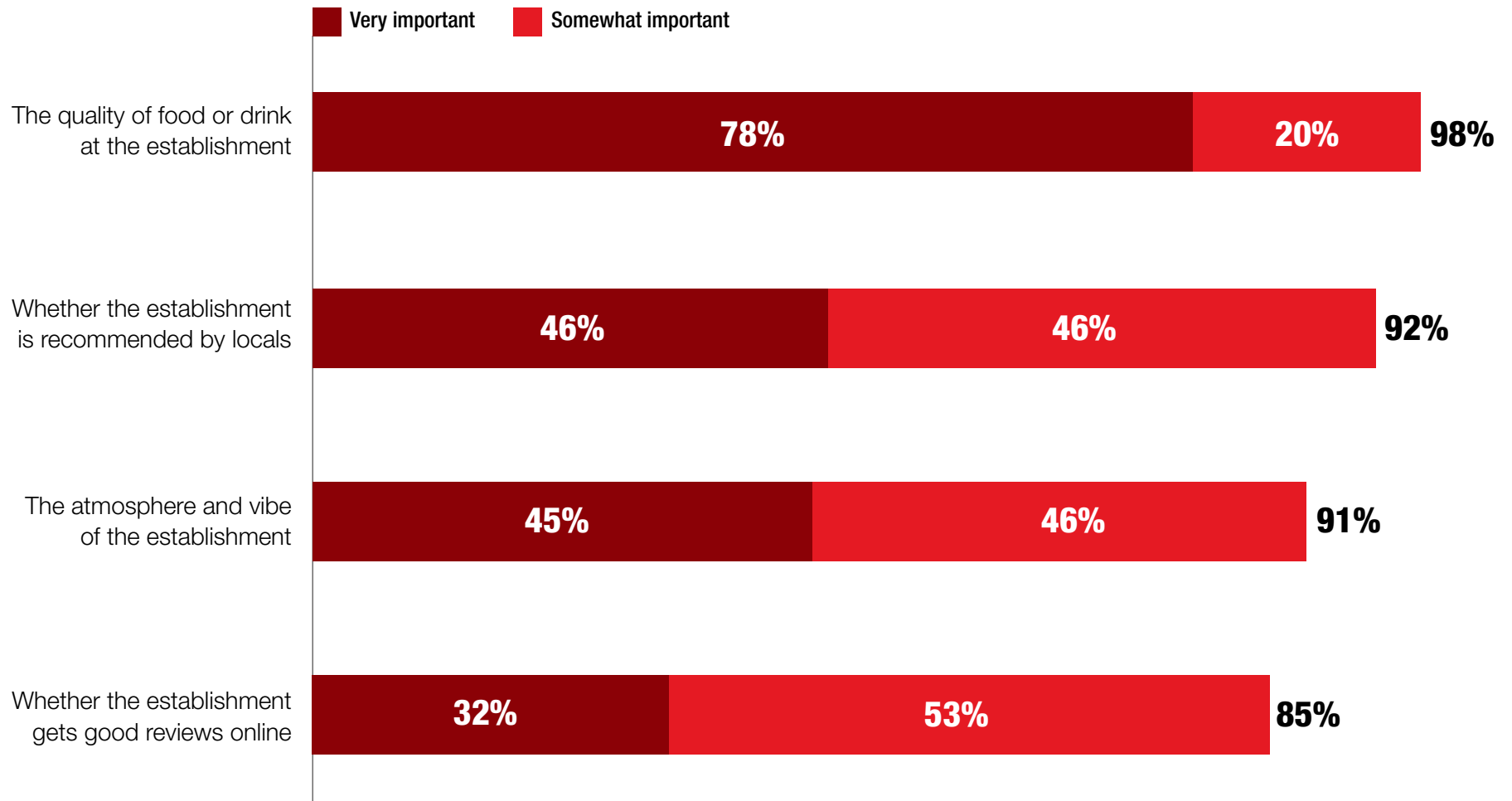


None of these are appealing to me



New question added in Pulse Check Wave 1 – no trending.
 Base: Out-of-state pleasure travelers (past 3 years or next 2 years) (n=501)
 QPC9. Which of the following food and drink experiences is most appealing to you personally?

Factors Considered when Choosing Where to Eat/Drink



New question added in 2017 Pulse Check (Nov) – no trending.

Base: Out-of-state pleasure travelers (past 3 years or next 2 years) (n=501)

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



Thank you