

## Key trends in culinary tourism

Insight into the key trends in culinary tourism, the profile of culinary travelers and what the future holds for the industry

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# Table of Contents

<b>Overview</b>	<b>3</b>
• What is Culinary Tourism?	4
• Culinary Tourism as a Means for Economic Development	5
<b>Insight into Culinary Travelers</b>	<b>6</b>
• Insight into Culinary Travelers	7
<b>Trends in Culinary Tourism</b>	<b>10</b>
• Trends in Culinary Tourism	11
• In Focus: Trends in Culinary Tourism	13
• How are Industry Players Responding to the Trend of Culinary Tourism?	15
<b>Outlook</b>	<b>16</b>
• What is the Way Forward?	17
<b>Appendix</b>	<b>18</b>



Overview

# What is Culinary Tourism?

## Food and drink tourism is growing in popularity globally

Culinary tourism refers to trips in which the exploration of local gastronomy plays a central role to the overall traveling experience. In particular, as the Ontario Culinary Tourism Alliance puts it, culinary tourism includes any “tourism experience in which a person learns about, appreciates, consumes, or — dare we say — indulges in food and drink that reflects the local cuisine, heritage, or culture of the place<sup>[1]</sup>.” Whereas some people travel deliberately for culinary purposes, others are considered opportunistic culinary travelers, since food and beverage experiences are not considered the main purpose of their trip.

## Consumers are willing to experiment and try new cuisines as a result of globalization and shifting economic influence

In recent years, the number of food and drinks enthusiasts around the world has risen rapidly. Globalization, coupled with a shift in cultural and economic influence from West to East, and the boom in travel flows around the world is resulting in consumers becoming increasingly familiar with different food cultures. Consumers are willing to experiment and try new products and ingredients that are perceived as exotic, especially when traveling abroad.

## Gastronomy is a tool to better understand culture and heritage

Given that people traveling abroad are increasingly seeking authentic and transformative travel experiences, local cuisine provides them with a unique lens through which they can better understand the history, people, and the culture of the destination they visit.

Similarly, TV programs about chefs, cooking, traveling, and cooking competitions have equally had a positive impact on the public’s growing passion about gastronomy. From Anthony Bourdain’s “Parts Unknown” to “Master Chef,” these TV programs have greatly influenced the way people cook, but most importantly have transformed their preferences in food, especially when traveling.



Food tourism is the pursuit and enjoyment of unique and memorable food and drink experiences, both far and near.

—Erik Wolf, Executive Director & Founder, World Food Travel Association



Source: Shutterstock

# Culinary Tourism as a Means for Economic Development

## Culinary tourism can play an important role in the development of a destination

In 2017, tourists traveling abroad spent US\$186.8 billion in the foodservice channel, making it the fourth largest spending category after transportation, retail, and accommodation. When traveling abroad, every tourist spends on foodservice; however, this does not make everybody a culinary tourist.

Yet, this figure suggests the great potential that culinary tourism can have for destinations. The development of gastronomic tourism can allow a destination to diversify its product offering, rendering a region more attractive to visitors and ultimately resulting in higher revenue<sup>[2]</sup>. In particular, by building a strong reputation for food culture, as is the case with Italy and France, for example, destinations can enjoy an array of benefits such as high yield tourists, a positive trickle down effect on other industries such as agriculture and retail, and the creation of jobs in more niche segments such as food and beverage tours, cooking workshops, and cooking with locals.

## Protecting regional gastronomy is a means to safeguard cultural authenticity

Moreover, raising awareness about the gastronomy of a region can act as a tool for protecting local food traditions, ingredients, and culture. By promoting the uniqueness of the regional cuisine instead of trying to incorporate foreign trends and adapt to the food tastes of the tourists, a destination can safeguard its culture.

## More destinations embrace localism when it comes to food and drinks

Whereas many destinations are gradually embracing localism rather than globalization when it comes to gastronomy — they are turning to local



A Scandinavian bar in the Greek island of Mykonos

Source: My Greece Travel Blog

products that represent their traditions instead of following global trends — a number of players are still trying to attract tourists by offering them an ‘at home’ experience even when traveling abroad.

This is the case with the numerous British pubs across Spanish tourist hotspots, or the array of Scandinavian bars in the islands of Crete, Zante, Mykonos, and Rhodes in Greece. Given the high number of visitors from the UK and Scandinavia to Spain and Greece, respectively, local industry players are seeking to attract travelers by offering them a British or Scandinavian experience at their destination. Although these undertakings can lead to short-term economic profit, they are undermining one of the fundamental purposes of traveling, which is exploring new places and interacting with new cultures. At the same time, these practices put local traditions at risk, therefore, it is essential for destinations to find a balance between embracing localism and globalization.

A large, stylized graphic on the left side of the page. It consists of a large, light-colored circle with a thick, dark-colored 'G' shape inside it. The 'G' is formed by a thick vertical bar on the left and a curved bar on the right, both with rounded ends. The background is a dark, solid color.

# Insight into Culinary Travelers

# Insight into Culinary Travelers

## Types of culinary travelers



### “I travel for food”

This type of tourist is traveling deliberately to participate in culinary experiences, with them being the most important part of their holiday. In particular, they enjoy exploring the culture of a destination through gastronomy and are likely to participate in a handful of culinary activities such as cooking with locals, visiting food markets and museums, participating in culinary tours, and buying local food delicacies<sup>[3]</sup>. Usually, they tend to book such activities in advance.



### “While on my trips I enjoy participating in gastronomical experiences”

Although this type of tourist does not travel predominantly for culinary purposes, they are quite interested in trying local cuisine by visiting restaurants and markets, and occasionally by participating in tours if these happen to fit in their plans.



### “I am not interested in culinary activities when traveling”

This type of traveler is not characterized by a high interest in culinary activities and is not going to seek out such experiences themselves. However, if these activities happen to be available and do not interfere with any of their plans, they may try some out.

## Trending food behaviors



Street food



Organic & ethical food



Gourmet food



Innovative gastronomy

Source: Shutterstock

# Insight into Culinary Travelers

## Food reputation is an important factor when choosing a holiday destination

According to GlobalData's consumer survey Q3-2018, 27.6% globally argued that the popularity of a destination in terms of food and drink is a factor that helps them decide where to go on holiday. The same survey showed that generation Z and millennials find local cuisine more influential when choosing a destination, compared to generation X and baby boomers.

The good gastronomical reputation of a region is fundamental for tourism. For instance, besides reasons such as the rich cultural heritage, history, architecture, and beautiful landscape, cuisine is among the most important factors for travelers choosing to visit Italy.

## Europe is considered to be home to the highest quality food and drink products

According to GlobalData's consumer survey Q4-2016, Europe is the region associated with the highest quality food/drink products, followed by the US and Asia (excluding China). The cuisine of European countries such as France, Italy, Spain, and Greece are known worldwide and are considered among the best globally. The same is true for the US, but also for Asia, which is characterized by high diversity in countries and thus cuisine.

### Consumers who consider the popularity of a destination in terms of food/drinks when deciding where to go on holiday are:

**17%** more likely to consider social media when booking



**12%** more likely to consider recommendations by friends and relatives



**12%** more likely to consider news, articles, blogs



Source: GlobalData Consumer Survey Q3-2018

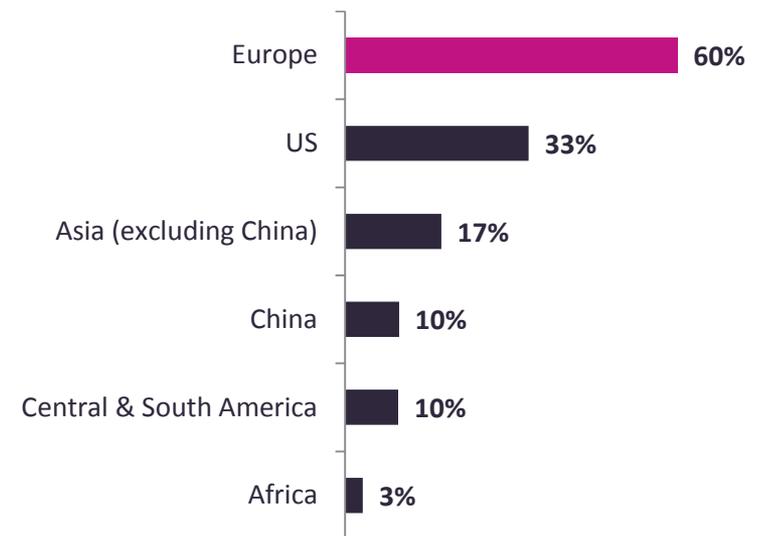
### Global: Which factors help you decide where to go on holiday?



Famous/popular destination in terms of food/drinks

Source: GlobalData Consumer Survey Q3-2018

### Global: Which of the below regions do you associate with high quality food/drink products?



Source: GlobalData Consumer Survey Q4-2016

# Insight into Culinary Travelers

## Millennials are the driving force behind culinary tourism

Millennials are a trend-setting generation in food, among other sectors. From demands for ethically produced food and customization, to quick meals, the love of discovering new cuisines, and being the driving force behind the vegetarian and vegan movements, the generation has redefined the 'food experience' globally, completely transforming the way we eat.

This, coupled with millennials' quest for transformative and experiential travel can explain why local gastronomy plays a fundamental role when they plan their next holiday. Cooking with locals, visiting food markets, trying street food, and exploring the different restaurants of a destination — from historical to modern ones and from family-owned to big chains — travelers can get an authentic glimpse into a destination, ultimately allowing them to better understand how a destination and its cuisine have evolved over time.

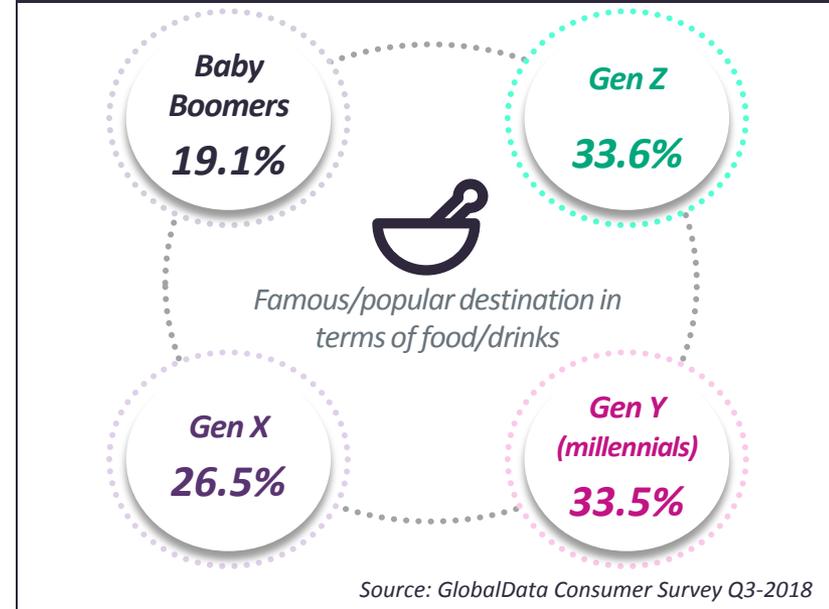
## Older cohorts are becoming more open-minded when it comes to food

However, other generations are showing growing interest in gastronomic tourism too. Growing disposable income; the maturation of the travel market, meaning a higher number of experienced travelers; and the willingness to experiment are translated into higher demand for culinary experiences among older cohorts.

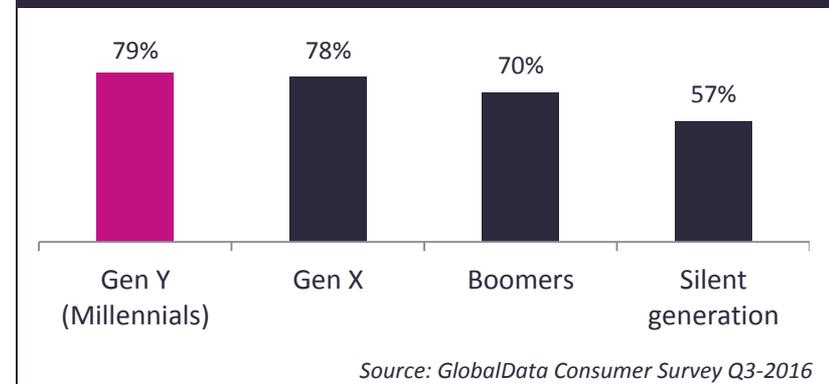
## There is high interest in experimenting with products from different cultures across generations

Evidence from GlobalData's consumer survey Q3-2016 also supports the view that globalization and the subsequent cultural shift from West to East is making consumers more open-minded in terms of food willing to try new, exotic products. Whereas millennials are the key force behind culinary tourism, the findings suggest that generation X (78%) and baby boomers (70%) are also highly likely to enjoy experimenting with products from different cultures.

### Global: Which factors help you decide where to go on holiday? (By generation)



### Global: "I enjoy experimenting with products from different cultures/countries" (By generation)





# Trends in Culinary Tourism

# Trends in Culinary Tourism



**Trend #1**  
Gastronomy tours by locals



**Trend #3**  
Street food and markets



**Trend #2**  
Home cooking and meal sharing



**Trend #4**  
Cooking lessons

Source: Shutterstock

# Trends in Culinary Tourism

## Trend #1: Gastronomy tours by locals

One of the most common ways through which tourists seek to learn more about local food and culture is gastronomy tours, often run by locals. Tours tend to be focused on food, but also on drinks such as wine, beer, vodka, and whiskey. Often, travelers can combine the degustation of both food and beverages depending on their preferences. More specifically, culinary tours range from the tasting of unique recipes and delicacies of a destination, to visits to farms and factories where travelers can gain an insight into the production and processing of a product.

## Trend #2: Home cooking and meal sharing

Whereas local restaurants and food tours allow tourists to get a glimpse into a region's gastronomy, they cannot compare to actually having the opportunity to dine at a local's house and experience how a family interacts while cooking and eating together, thus, witnessing traditions surrounding food culture first-hand.

This, coupled with the greater quest for authentic travel experiences, has given rise to the trend of tourists willing to join locals to share home cooked meals and get to know each other. EatWith has capitalized on this trend by creating online platforms that connect travelers with local hosts and allow them to share meals, undertake tours of the host's farms, and even exchange cooking tips.

## Trend #3: Street food and markets

Street food and visiting markets are synonymous with traveling and exploring local culture. Yet, not all demographic cohorts were likely to visit local markets and indulge in street food a few years ago. Lately though, street food culture has undergone substantial transformation and is undoubtedly on the rise across generations – as the sophistication of food offered at street markets is increasing, it is becoming more appealing to older cohorts too. In the last decade, the popularity of markets has skyrocketed, with many becoming must-see attractions, as is the case with Camden Market in London, the Grand Bazaar in Istanbul, and Chatuchak Weekend Market in Bangkok<sup>[4]</sup>. This is mainly because markets allow tourists to discover different aspects of social history such as its folklore and pop culture.

## Trend #4: Cooking lessons

Cooking lessons are another growing trend within culinary tourism. Whereas the final product, a meal in a restaurant, allows tourists to taste local cuisine, watching and participating in the preparation of food allows them to appreciate and understand a region's gastronomy at a deeper level. Cooking lessons are growing in demand among millennials, families with kids, and solo travelers, as they are seen as an entertaining way to meet and interact with new people, both locals and travelers from other countries. Most importantly, by going through the process of preparing a meal, tourists have the opportunity to gain an insight into the influences that have shaped a cuisine, such as the way that Chinese immigrants have influenced Peruvian gastronomy, or the way that the Turkish influenced Greek cuisine and vice versa.

# In Focus: Trends in Culinary Tourism

## Trend #1: Gastronomy tours by locals



Culinary and wine tours are growing in demand globally. Although the majority of these tours tend to last for a few hours, industry players are increasingly launching new offerings, aiming to meet the expectations of travelers who are predominantly traveling for culinary purposes. As a result, we are now witnessing the rise in the number of culinary and beverage tours that last from a day to a week.

A representative example of such tours is the Loire Valley Wine & History tour in France. Historical Tours in collaboration with Arblaster & Clarke Wine Tours launched a seven-day itinerary, which is led by historian Dr Michael Jones and wine guide Lys Hall<sup>[5]</sup>. The itinerary combines visits to several historic châteaux of the region such as Chenonceau, and some of the best and famous wineries of France. Whereas street food markets, urban culinary tours, and meal sharing apps are particularly appealing to younger cohorts such as millennials, the Loire Valley Wine & History tour is an itinerary that seeks to capture older, affluent demographics that are highly interested in gastronomy, but at the same time have a passion for history and culture.

## Trend #2: Home cooking and meal sharing



# EatWith

EatWith was launched in 2012 with the aim of promoting social eating experiences around the world. The meal sharing app can be thought of as the Airbnb of food. Capitalizing on the growing demand for unique and authentic travel experiences, the platform allows its users to connect with local hosts at the destinations they are visiting.

Depending on the availability of activities, travelers can undertake cooking lessons with hosts, cook together and share meals while getting a glimpse of the lives of locals by visiting their homes.

EatWith is an innovative platform as it allows its users to discover a new culture through gastronomy from the inside. Since 2012, the app has come to include food experiences in more than 150 cities around the world, becoming an increasingly valuable travel tool for tourists seeking to create unique travel memories.

Source: Brand websites

# In Focus: Trends in Culinary Tourism

## Trend #3: Street food and markets



Source: Shutterstock

Bangkok's Chatuchak Weekend Market is a representative example of the wide popularity that street food and markets have gained in recent years. Chatuchak is the largest market in Asia and is considered a must see attraction in one of the world's most visited cities<sup>[6]</sup>. The market covers 27 acres and is home to 8,000 food, clothing, and souvenir stalls.

Although the market was very popular among Thai people, in recent years, Chatuchak has also become a magnet for tourists, with 200,000 to 300,000 visitors heading to Chatuchank every weekend. The diversity of products and the opportunity to try local food while interacting with locals in such a dynamic environment is the key reason behind the great success of the market as a tourist attraction.

## Trend #4: Cooking Lessons



Source: Brand website

Lake House is a luxury lodge in Australia, located in Victoria's 'Spa Country'. The retreat lodge has won many awards, including Australia's Best Regional Hotel in 2014, and is listed in Tatler's 101 best hotels in the world<sup>[7]</sup>. The hotel features a spa, numerous retreats, and a restaurant that embraces the principles of the slow food movement. Following the success of both the hotel and the restaurant and the high demand for occasional cooking workshops organized at the hotel, the managing Director of Lake House launched a cooking school. Guests can undertake lessons with some of Australia's most renowned chefs, who stress the importance of using local products and are supporting the burgeoning local food culture – the region is home to numerous farmers' markets with organic local products. Guests can also sign up for experiences such as bee keeping, foraging, fly fishing, butchering classes, and fermentation with local farmers and producers. Lake House's cooking school is a representative example of how a hotel has tapped into the culinary and wellness trends in tourism, to create a very unique proposition that greatly appeals to the growing cohort of mindful and curious consumers.

# How are Industry Players Responding to the Trend of Culinary Tourism?

## Hotels



Beer consumption has been growing in recent years, with more consumers showing high interest in craft beers. The hospitality industry has been paying attention to this trend and the multinational brewery Brew Dog responded by opening the world's first beer hotel in August 2018<sup>[8]</sup>.

Although a beer hotel concept remains rather niche, the opening of the hotel is representative of how the tourist industry is tapping into gastronomy and beverages to introduce unique and exciting offerings for consumers who are passionate about food and drinks and want to combine this passion with a holiday. The success of this undertaking remains to be seen, but more accommodation establishments are expected to shift their focus to gastronomy to create unique propositions in the foreseeable future.

## Tourism Boards



As competition between tourist destinations intensifies, tourism boards are seeking to diversify their offering propositions by looking at the intangible cultural heritage of their regions. One such example is gastronomy and the respective development of culinary tourism, of which wine tourism plays an important role.

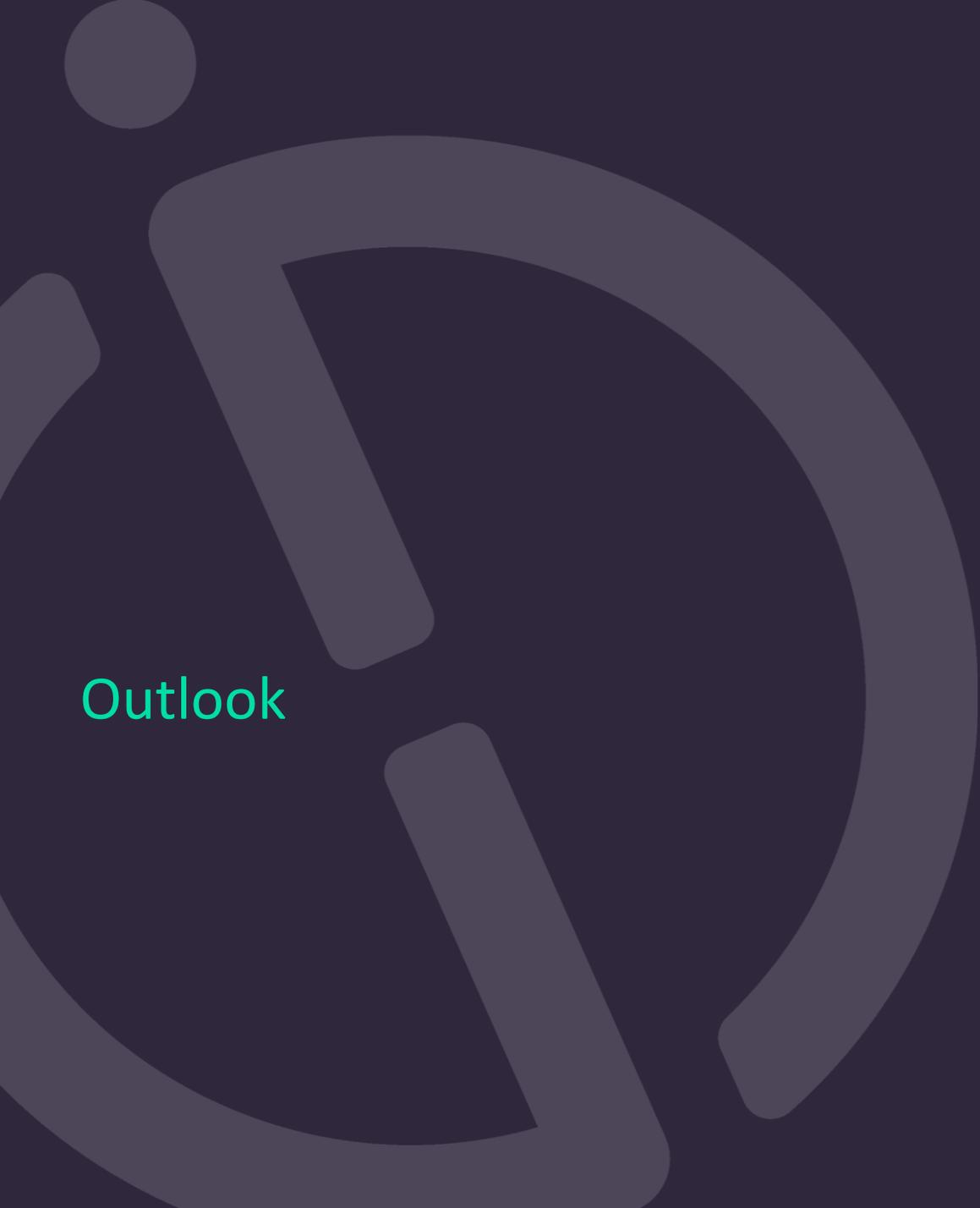
Georgia, aiming to develop its tourist market, has turned towards its long and rich wine history. Given the growing appreciation for authentic food and products around the world, Georgia has declared wine tourism a priority for the development of its national travel industry and is actively incentivizing local players to capitalize on the rich traditions of Georgian viticulture in order to introduce tourism offerings with unique selling points.

## Airlines



In recent years, airlines have intensified their efforts to improve the quality of food on-board; from introducing meals that match the increasingly complex preferences of their customers to serving gourmet meals and partnering with famous chefs, airplane food has undoubtedly seen an upgrade. Although the majority of full service companies (FSCs) are experimenting with their on board menu, an airline that stands out is Japan Airlines<sup>[9]</sup>. The company partners with a number of well-known Japanese chefs — at the moment it works with nine chefs — in order to reinvent and design not just the premium, business, and first class meals, but also the economy ones. The airline updates its menu regularly and works with restaurants in Japan, to keep up with new trends in dining. There is also a self-service snack corner in most airplanes, in case passengers get peckish.

Source: Shutterstock, Brand websites



Outlook

# What is the Way Forward?

As globalization and the cultural and economic shift of influence from West to East are intensifying, consumers are expected to be more open to the exploration of new cultures and more likely to experiment with new cuisines. This and the rapid growth in international travel are going to fuel the demand for culinary tourism.

Trends such as gastronomy tours by locals and experts, street food and markets, cooking lessons, and home cooking and meal sharing are expected to remain highly influential within culinary tourism.

Regions must embrace their culinary history and incorporate gastronomy in their tourism offerings. In particular, countries with rich culinary traditions should focus on the development of culinary tourism and provide incentives for local businesses to invest in this tourist segment.

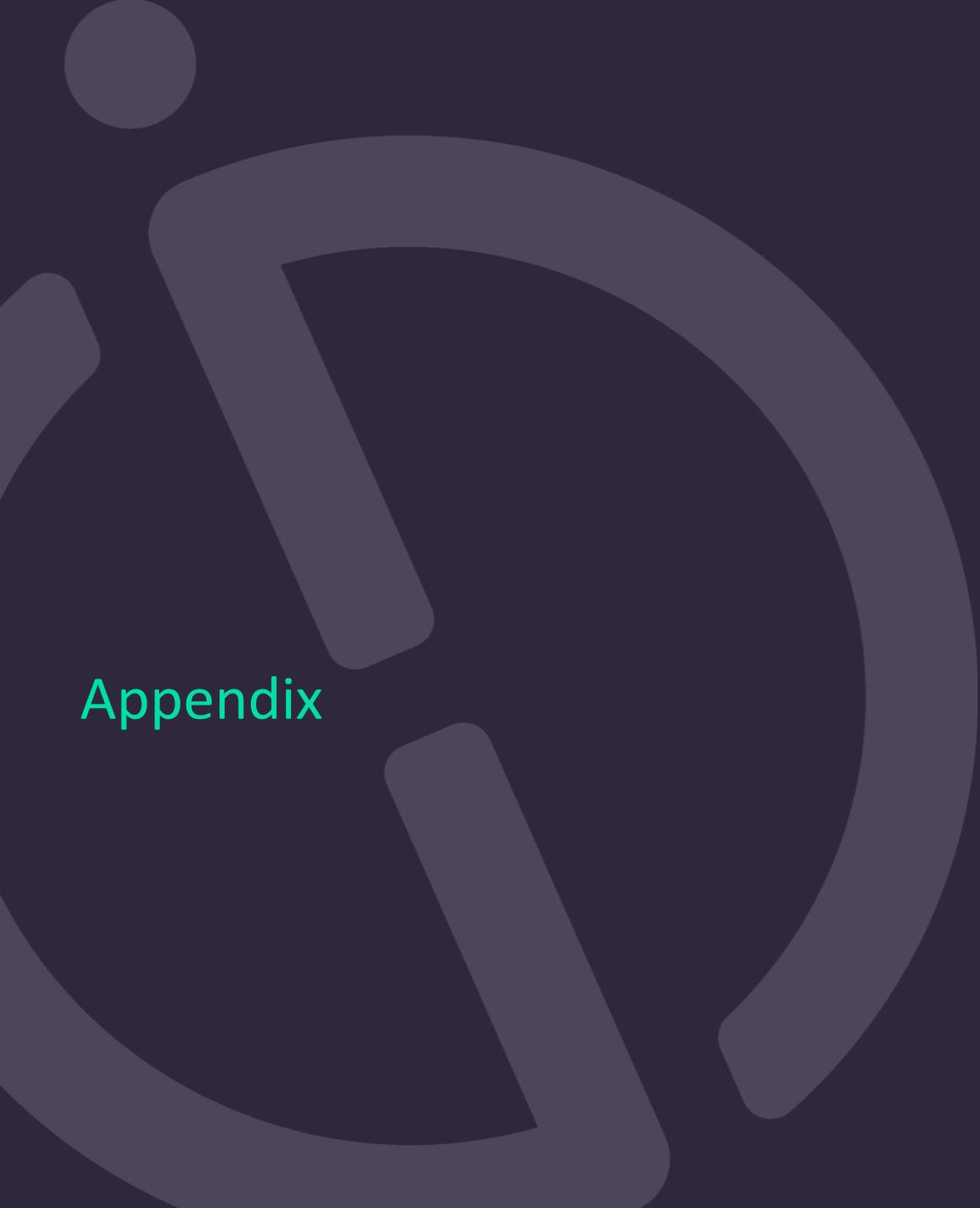


Tourism boards, hotels, and resorts that operate predominantly in rural areas must partner with local farmers and producers to create authentic culinary experiences. This will have positive trickle down effects both for tourism businesses and agricultural ones.

Tour operators must tap into the culinary tourism trend by building packages around destinations that are globally known for their rich gastronomy and traditions as is the case with Italy, France, China, and Vietnam. To ensure the success of such offerings, operators must seek to combine the culinary tourism trend with other emerging trends such as ecotourism, wellness, and cultural and adventure tourism.

Hotels willing to target culinary tourists must develop an array of high-class gastronomy activities or partner with external providers of such services. From launching cooking classes, gastronomy tours with locals or experts, tailoring their menu and featuring different cuisines, and organizing food and drinks workshops, accommodation providers could become a hub for food-loving tourists.

Source: Shutterstock



Appendix

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# Terminology and Definitions

TERMINOLOGY	DEFINITION
<b>Baby Boomer</b>	Baby boomer is a term referring to a person who was born between 1946 and 1965.
<b>HNWIs</b>	HNWIs are individuals with more than US\$1 million in on-shore liquid assets.
<b>Millennial</b>	Millennial is a term referring to a person who was born between 1981 and 1991.
<b>Slow Food</b>	Slow Food is a global, grassroots movement with thousands of members around the world that links the pleasure of food with a commitment to community and the environment. It was founded in 1989 in Italy.

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Konstantina previously worked in the Cities division of GlobalData before moving into the Travel and Tourism team. In the Cities team, she analyzed macroeconomic and demographic data for metropolitan areas and produced insight and analysis on urban development trends and their impact on societies and the global economy.

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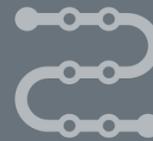
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