

How the world views Britain's food

Foresight – issue 146

VisitBritain Research



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Introduction

Food is often not top of mind when tourists think about taking a trip Britain, and it often falls below Britain's great cultural and historical attractions in terms of appeal. Research shows that Britain's food and drink offering is not a strong driver for visiting. But what is the appeal of and satisfaction with British food?

In this report we will look at how tourism and food are linked in general and at the perceptions of British food. We will also look at the interest in trying different types of British dishes as well as the actual experiences of visitors to the UK.



Summary

- **Food and tourism:**
 - In general, a high proportion of travellers have tried a new food whilst on a recent trip. Many travellers are keen to try out local specialities and nearly as many would like to have gourmet food whilst on holiday.
 - Chinese travellers are most likely to use social media to look for food and drink recommendations, whilst European travellers are least likely to do this.
 - Over half (54%) of global travellers have used their smartphone to look at food or drink reviews whilst on a holiday.
- **Britain and food:**
 - Many travellers have a low association of Britain with food.
 - Generally food is not a major reason why people visited the UK in 2015, and only 4% of visitors cited it as a top 3 reason for coming in 2015.
- **Trying British food:**
 - Despite it not being a strong motivator to visit, there is high interest in trying local food and drink in Britain.
 - Many are open-minded to trying our local dishes, with 70% interested in trying at least one iconic British dish.
 - Women are more likely to be open to trying British dishes and new food in general.
 - British desserts and beer are appealing to travellers, and many would like to try a British pudding or a craft beer.
- **Satisfaction with food:**
 - Over three quarters of visitors to the UK in 2015 were satisfied with their food and drink. This falls behind satisfaction for attractions or transport but is ahead of satisfaction with value for money.



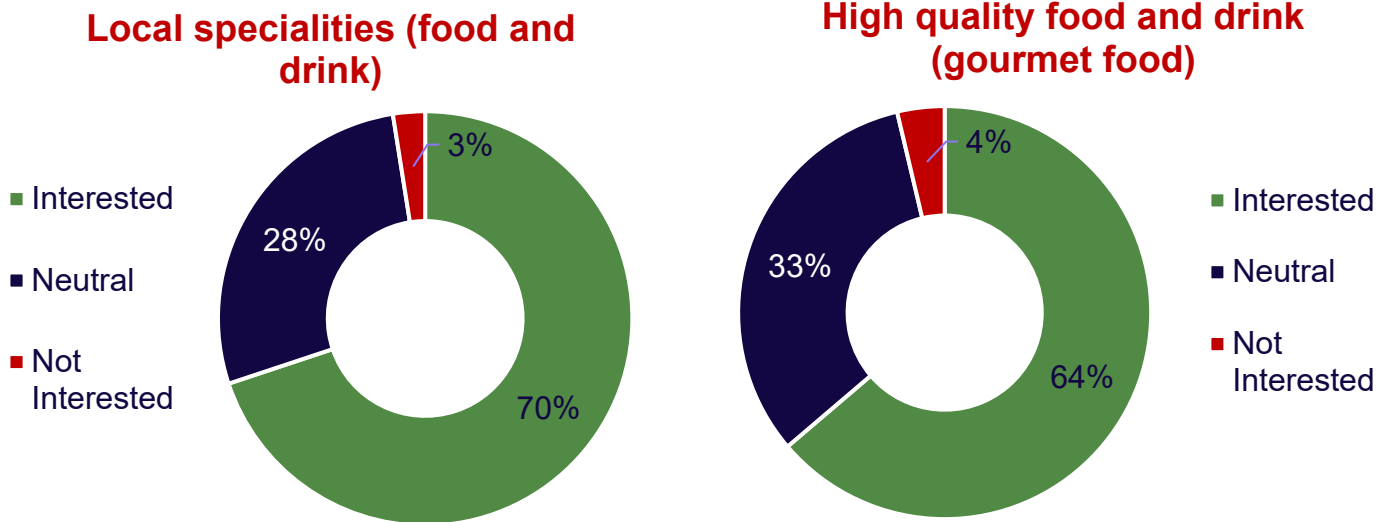
Food and Tourism

Interest in trying local and gourmet food on holiday

When thinking about travel in general, food does generate a good level of interest, and it is clear that tourism and food are linked.

According to a study conducted in 2013, a high proportion of travellers are keen to enjoy local specialities when on holiday, as well as higher quality gourmet food and drink.

Over two third (70%) of travellers would be interested in trying local specialities when on holiday, and a lower proportion (64%) are interested in trying high quality gourmet food. Around a third do not have strong preference or interest in trying either types of food on holiday, and only a small proportion (3% and 4%) would be actively disinterested in trying these food types.



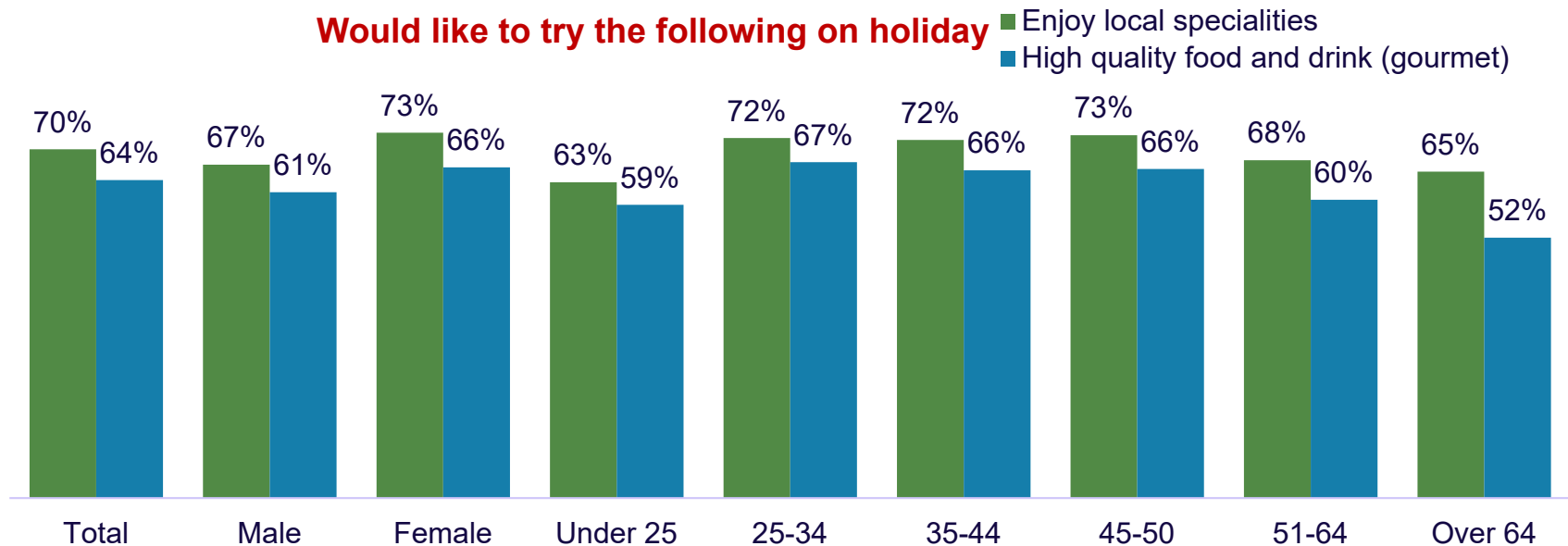
Source: Arkenford/VisitBritain (2013), The extent to which you want the following on holiday – ‘Enjoy local specialities (food and drink)’, ‘Enjoy high quality food and drink (gourmet food)’. Base: Total n=23,229 in 23 markets (Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Netherlands, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UAE, USA)

Trying local and gourmet food

Gender, Age

Overall, women are more interested than men in trying both local specialities and more high end food (6% and 5% higher respectively).

It is also evident that those aged between 25 and 50 are likely to be more adventurous with food choices when on holiday, as higher proportions within this age group would be interested in trying both local specialities or gourmet food. Those aged under 25 are less likely to be interested in local specialities (63% v 70% of totally) and those aged over 64 are less likely to want to try gourmet food than their younger counterparts.



Source: Arkenford/VisitBritain (2013), The extent to which you want the following on holiday – ‘Enjoy local specialities (food and drink)’, ‘Enjoy high quality food and drink (gourmet food)’. Base: Total n=23,229 in 23 markets, Male n=11,986, Female n=11,243, Under 25 n=3,540, 25-34 n=7,483, 35-44 n=5,629, 45-50 n=2,607, 51-64 n=3,272, Over 65 n=698

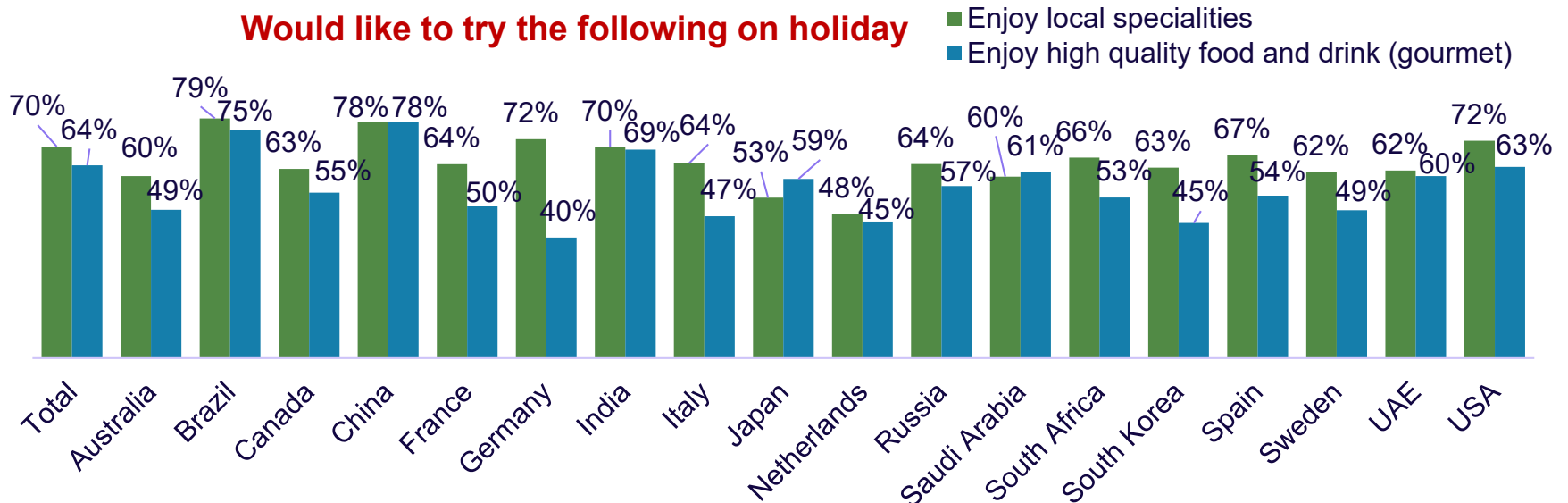
Trying local and gourmet food

Markets

In general, there is a higher interest in trying local specialities than gourmet food in most markets. Brazil and China are most interested in trying local food (79% and 78% respectively), whilst the Netherlands and Turkey are at the other end of the scale. Germans are much more likely to be interested in local specialities than gourmet food (72% v 40%) whilst the division is not so large in other markets.

Saudi Arabia and Japan are the only two markets that have a stronger preference for gourmet food rather than local specialities when they are on holiday.

Travellers from the USA are quite likely to be interested in both with 72% keen to try local specialities and 63% would enjoy gourmet food. Figures are a little lower in France; just under two thirds would enjoy local specialities and half would be interested in trying gourmet food when on holiday.



Source: Arkenford/VisitBritain (2013), The extent to which you want the following on holiday – ‘Enjoy local specialities (food and drink)’, ‘Enjoy high quality food and drink (gourmet food)’. Base: Total n=23,229, approx. n=1000 per market

Trying a new food on holiday

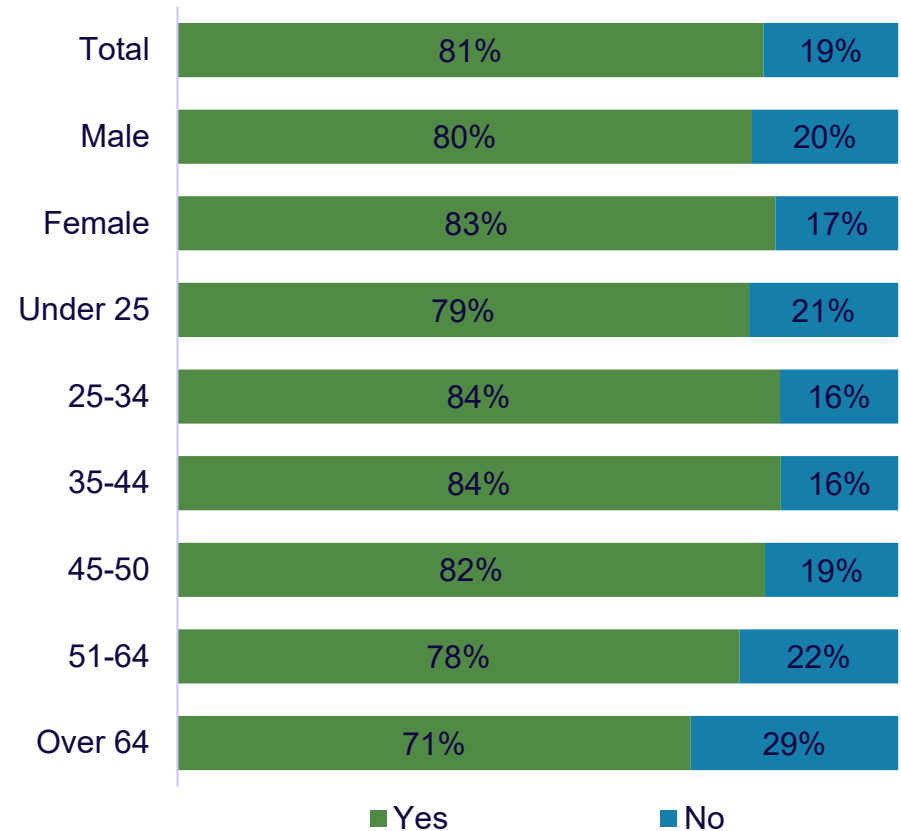
Gender, Age

When on holiday, most travellers are fairly adventurous and keen to try new food. Overall 81% have tried a new food for the first time, whilst on a recent holiday.

In general, women are slightly more adventurous than men, with 83% having tried a new food, compared with 80% of men. Again, those aged 25 – 50 seem to be more adventurous with food, and greater than 80% of this age group have recently tried a new food.

Those aged over 65 are least likely (71%) to have tried a new food whilst on a recent holiday.

Have tried a new food for the first time on holiday in the last 3/5 years



Trying a new food on holiday

Markets

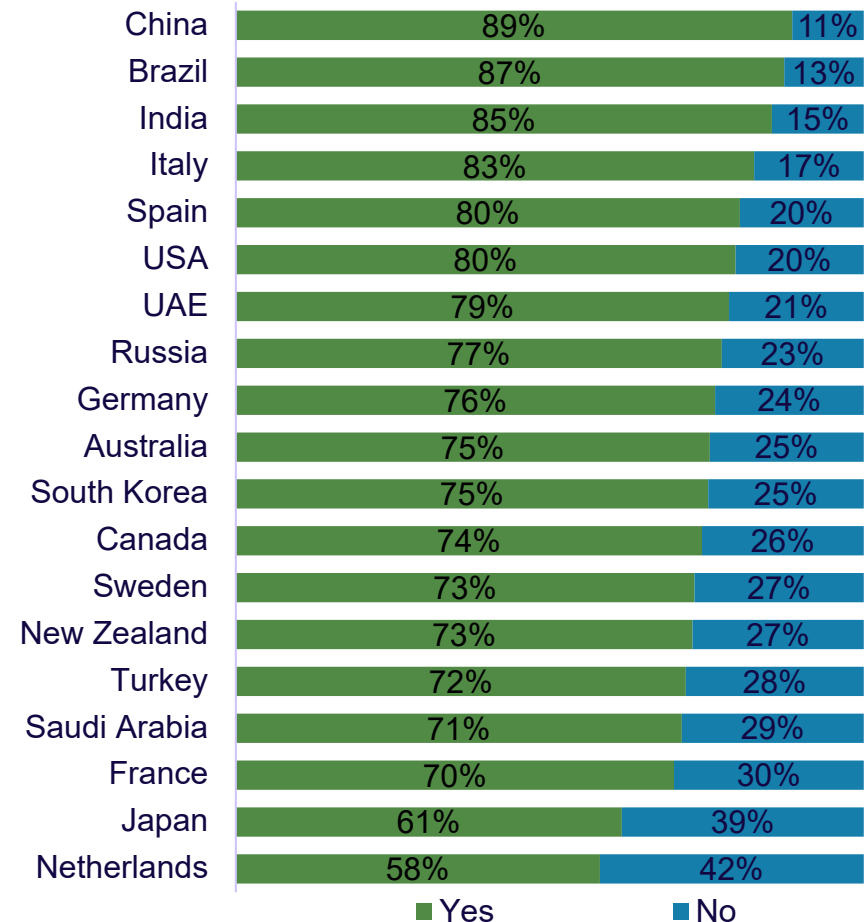
Travellers from China are most likely to have tried a new food on a recent holiday, with 89% saying that they have done this.

Other markets who have been adventurous with trying new foods on holiday are Brazil, India, Italy, Spain and the USA, where more than 80% have tried a new food within the last 3-5 years.

The markets that are least adventurous are Japan, where only 61% have tried a new food, and the Netherlands, with only 58%.

70% of French have tried a new food on holiday recently, and 76% of Germans have done the same.

Have tried a new food for the first time on holiday in the last 3/5 years

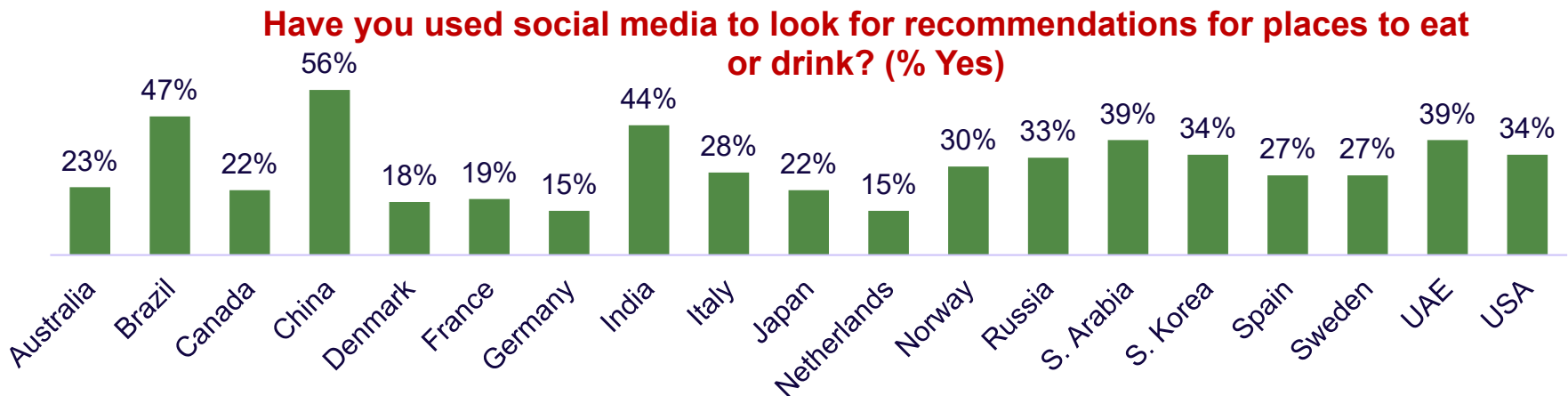


Using social media for food & drink recommendations

30% of people have used social media for recommendation on where to eat and drink.

Travellers from China are most likely (56%) to use social media to look for food and drink recommendations, followed by Brazil (47%), India (44%) and UAE (39%).

European countries are less likely to use social media for looking for food and drink recommendations: just 15% from France and 18% from Germany. Travellers from the USA have a higher likelihood to use social media in this way, with just over a third (34%) from USA having used social media to look for recommendations on their last trip to Britain or holiday abroad.



Source: IPSOS/VisitBritain. Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)? 'Look for recommendations for places to eat or drink'. Base: International travellers who have been to or would consider Britain as a travel destination All Respondents (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), Saudi Arabia (347), South Korea (600), UAE (253), USA (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)

Using a smartphone to find food and drink reviews

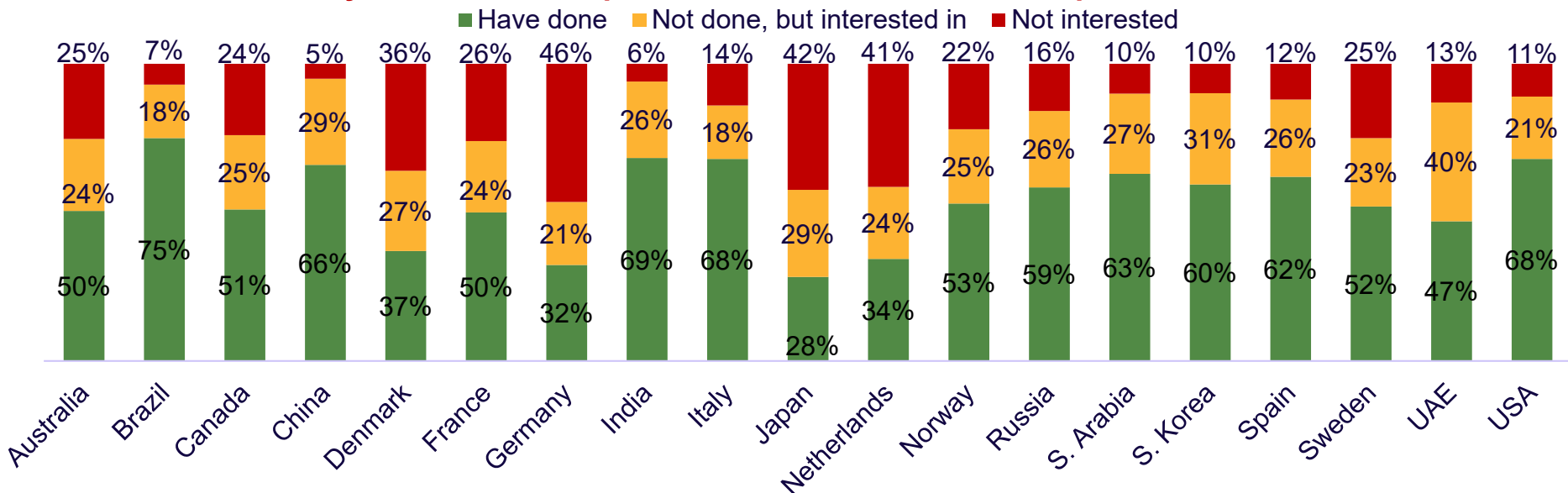
54% of people have used their smartphone to access reviews about where to eat and drink when they are on holiday.

This does vary greatly by market, with certain markets having a very high propensity to do this – Brazil 75%, India 69%, USA 68%, Italy 68% and China 66%.

Half of travellers from France have done this, and just a third of travellers from Germany have done the same.

On the flip side, 46% from Germany are not interested in doing this at all, followed by Japan (41%) and Netherlands (41%).

Have you used a smartphone to access reviews about places to eat or drink?



Source: IPSOS/VisitBritain. Which of the following have you done on holiday and which would you like to do in the future? 'Used a smartphone to access reviews about places to eat or drink'. Base: International travellers, All Respondents (11400), Australia (600), Brazil (600), Canada (600), China (600), India (600), Japan (600), New Zealand (600), Russia (600), S. Arabia (347), S. Korea (600), UAE (253), USA (600), Denmark (600), France (600), Germany (600), Italy (600), Netherlands (600), Norway (600), Spain (600), Sweden (600)



Expectations of Britain's food

Association of Britain and food

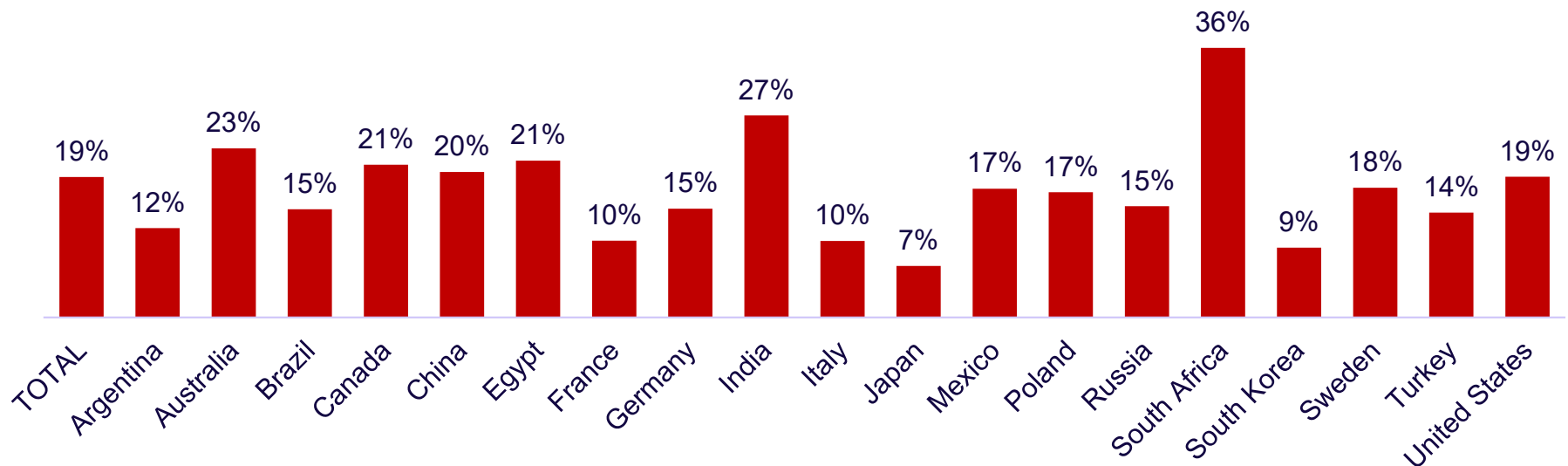
When asked which products they would associate with Britain for the 2015 Nation Brands Index study, the UK ranked 21st out of 50 for being associated with food as an export.

In general, 19% of those surveyed in the 2015 NBI study would associate Britain with food and this does vary a lot by market. Countries that have a strongest association with Britain and food are South Africa (36%) India (27%) and Australia (23%).

Countries that have the lowest association of Britain with food are Japan at just 7% and South Korea at 9%.

France and Italy, countries which typically score very well in terms of perceptions of their own food, do not score us very favourably at all. Just 10% in each France and Italy would connect Britain and food.

Associate Britain with food (%)

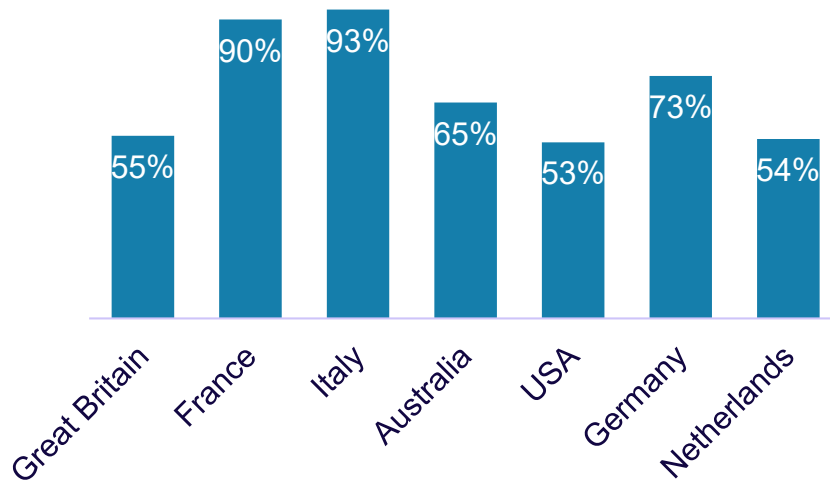


Britain's associations with local and gourmet food

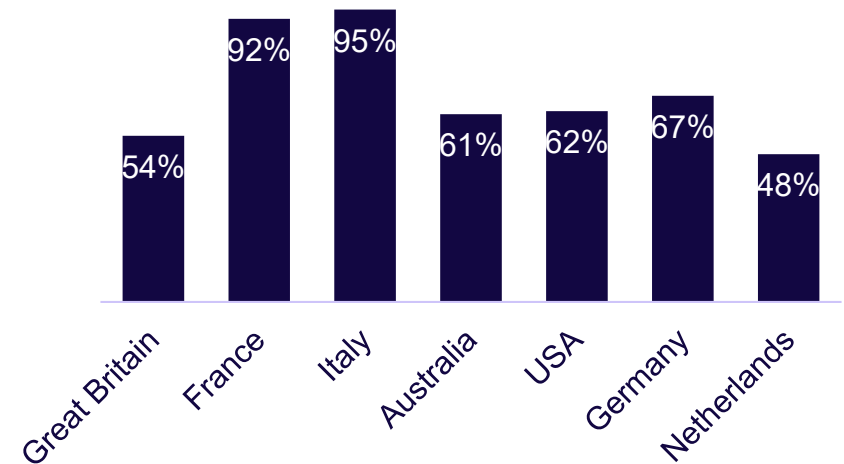
Of the 7 markets offered, France and Italy have high associations with both local specialities and high quality food and drink. Italy is most likely to be associated with local specialities (93%) and also gourmet food (95%).

Britain falls behind some of the more well-known markets in terms of food associations, with just 55% associating Britain with local specialities and 54% with high quality food and drink. Britain does, however, rank slightly higher than the Netherlands for gourmet and both Netherlands and the USA for local specialities.

% who think the country is a good place to get local specialities



% who think the country is a good place to get high quality gourmet food



Source: Arkenford/VisitBritain (2013), Of the following things that you have said you are looking for from a holiday, which of the following markets do you associate them with?. Base: Those who consider each aspect important when on holiday: Total n=23,229

Reasons for visiting Britain

Amongst holiday visitors to the UK in 2015, food was not often cited as a top reason for visiting the UK. The most mentioned reasons were for heritage and history (30%), culture (25%) and to see world famous places (24%).

Going out to eat and drink is a key reason for just 4% of UK visitors, showing that it is not a strong driver why visitors chose Britain as a destination. However, that is not to say that our food does not delight or appeal to overseas tourists but that it is not a primary reason for visiting. It could be that eating out and drinking takes a back seat to the other activities on offer in Britain, or is seen a hygienic factor – something expected to meet a certain standard, but not expected to wow.



Reasons for visiting Britain

Visitors v Considerers

Visitors (those who have visited Britain for a holiday) and Considerers (those who have not been, but would consider visiting) have differing opinions when it comes to Britain and food. Overall, it appears that Considerers are more positive about 'sampling the local food and drink' in Britain, and 24% say it could motivate them to visit.

Compared to Considerers, Visitors are less likely (18%) to say it was a key reason why they chose to visit, which reinforces that food is less likely to be a key motivator for actual visitors but could be a factor in persuading Considerers. Food is more likely to have been a key motivator for Visitors from some markets; 44% from China and 26% from Russia.

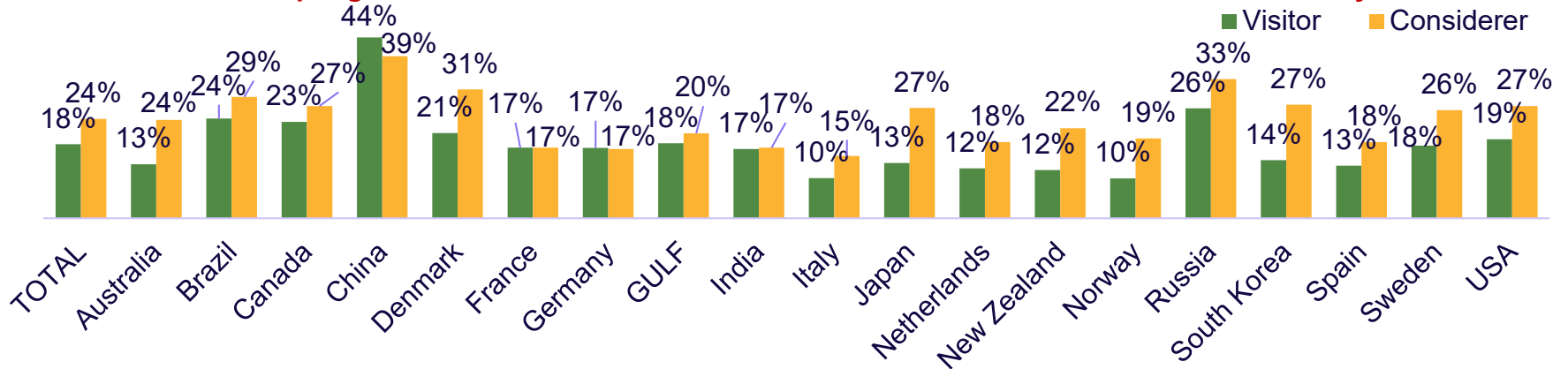
In terms of our largest inbound markets, visitors from France and Germany rank us on par with the average whilst considerers are slightly less optimistic about our food. Visitors and considerers from the USA are slightly more likely to see food and drink as a motivator and a reason for visiting.

Rank of 'sampling the local food and drink' as a reason or motivator for visiting Britain on holiday (out of 24 reasons)

#7 (Considerers)

#13 (Visitors)

'Sampling the local food and drink' is a reason or motivator to visit Britain on holiday



Source: IPSOS/VisitBritain, When you visited Britain on holiday, which of the following were the most important reasons why you chose to visit? Which of the following would be the most important motivators for you to visit Britain on holiday in the future? Please choose up to 5. 'Sampling the local food and drink'. Base: Britain Visitors n=4,754, Considerers n=5,555



Interest in British cuisine

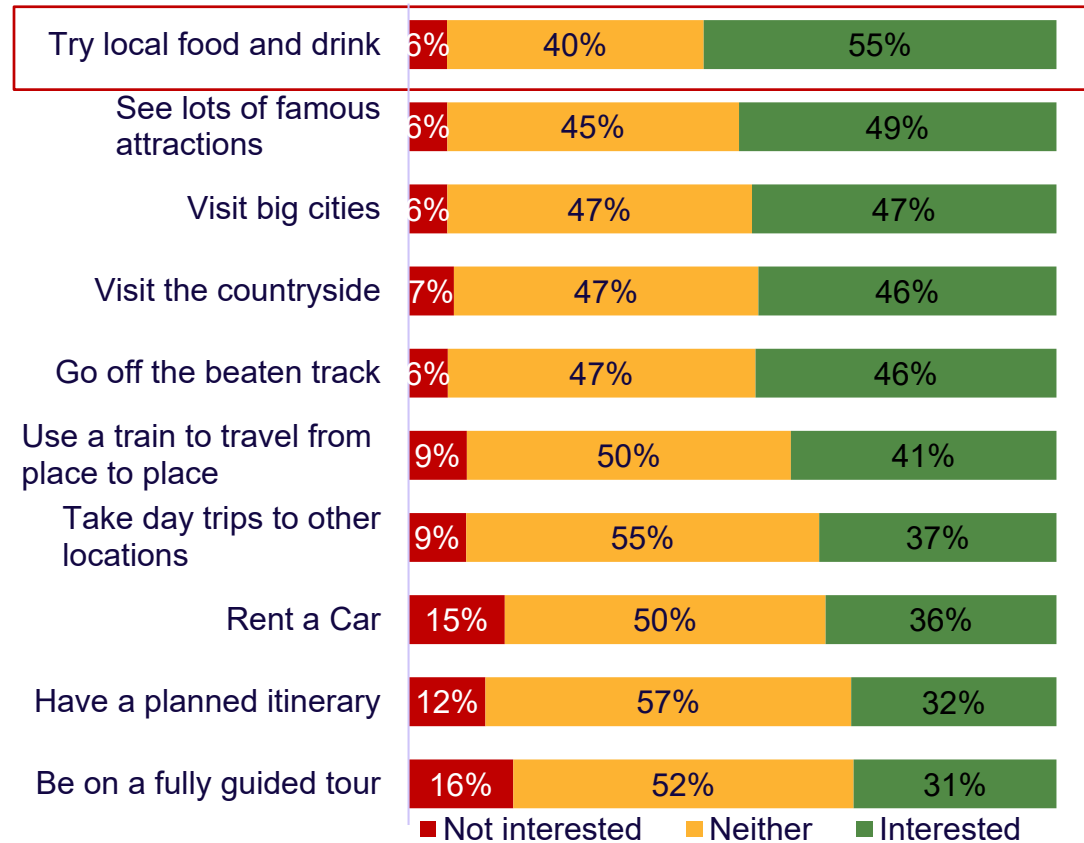
Interest in trying local food and drink in Britain

In the 2014 Nation Brands Index study, we saw that there was a high level of interest in trying British food and drink, with 55% interested in doing this on a holiday to Britain.

Trying local food and drink rated ahead of interest in seeing famous attractions (49%) and visiting big cities (47%).

In the 2015 Nation Brands Index study we asked what kinds of iconic British food people would like to try, which will be revealed in the following slides.

Interest in doing each of the following things on a trip to Britain



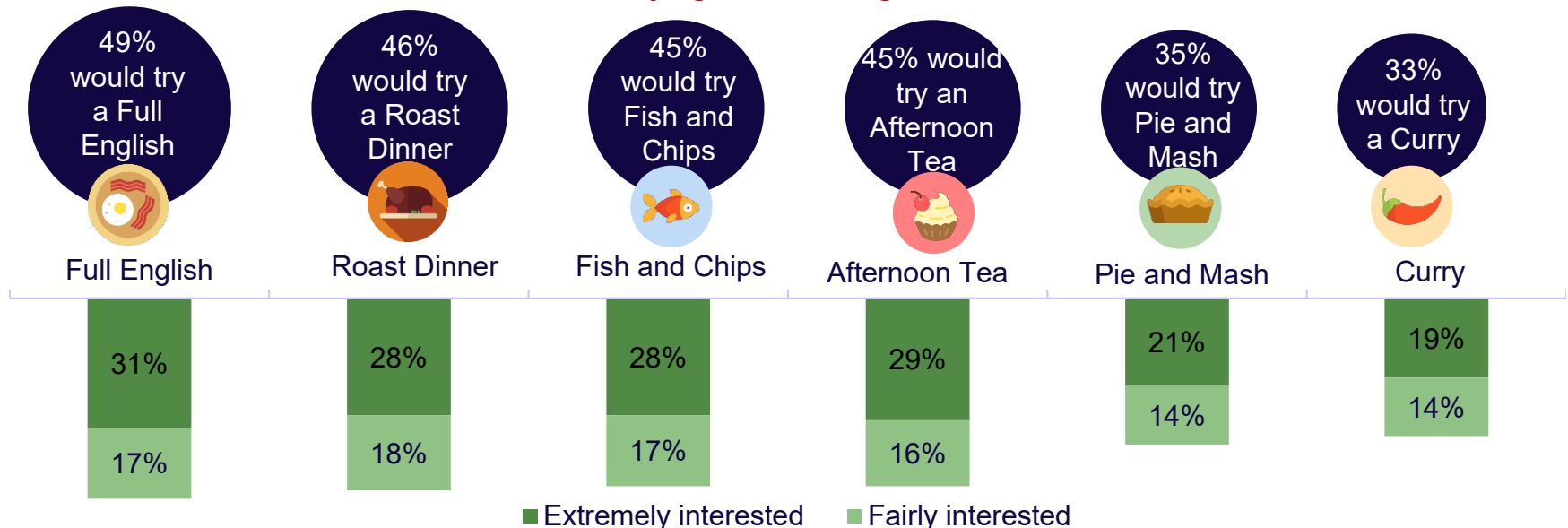
Interest in trying British dishes

When asked about which specific British dishes people would like to try, some dishes generate more interest than others. The typical Full English Breakfast is the most popular dish with 49% saying they would like to try this if on a hypothetical holiday to Britain. After this dish, the next most popular is the Roast Dinner with 46% interested in trying.

Fish and Chips and Afternoon Tea both rank equally with 45% interested in trying, whilst Pie and Mash and Curry are the least popular food choices, generating interest amongst just a third.

50%
are **extremely interested** and **71%** either **extremely or very interested** in trying at least one of the below British dishes

Interest in trying the following British foods:

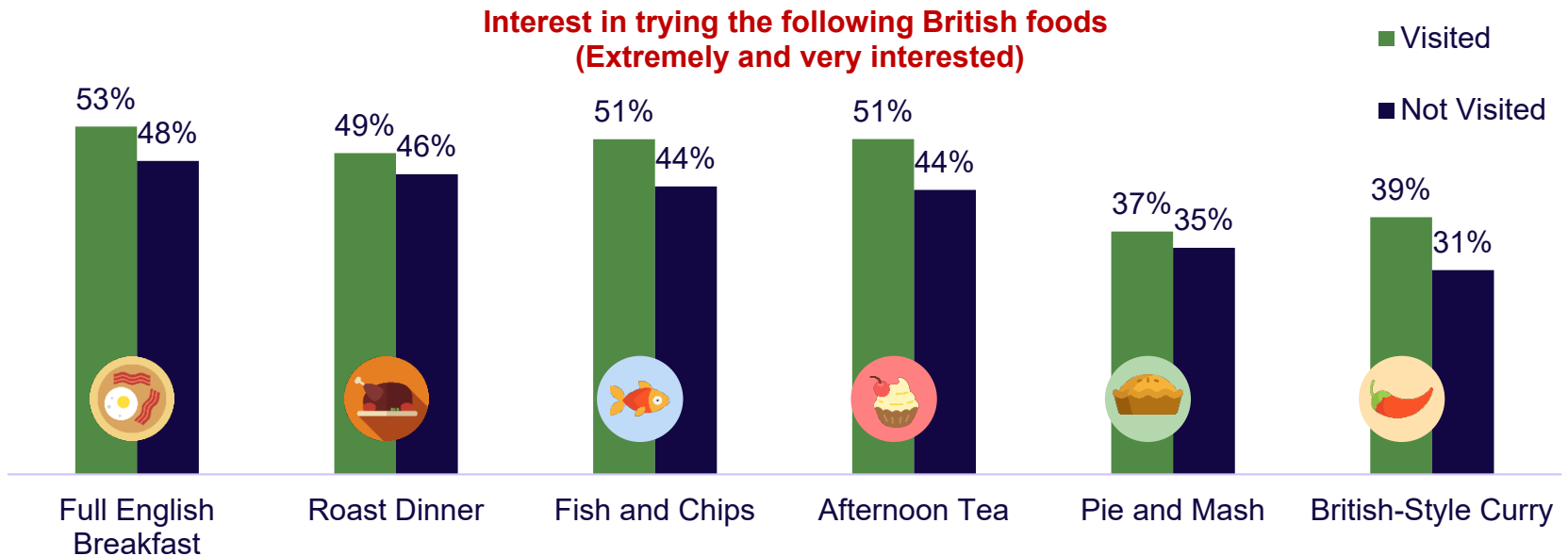


Interest in trying British dishes

Visitors v Non-visitors

For all British dishes asked about, those who have previously visited the UK are more likely to be interested in trying British food than those who have not visited. This indicates that the reality of British food might be better and more appealing than the expectation, as Visitors may well have already tried some of these dishes.

Interest in Full English Breakfast increases to 53% amongst those who have visited (still in 1st place), and Fish and Chips and Afternoon Tea rise to 2nd and 3rd place. British-Style Curry appeals to 39% of visitors and 31% of those who have not yet visited.



Interest in trying British dishes

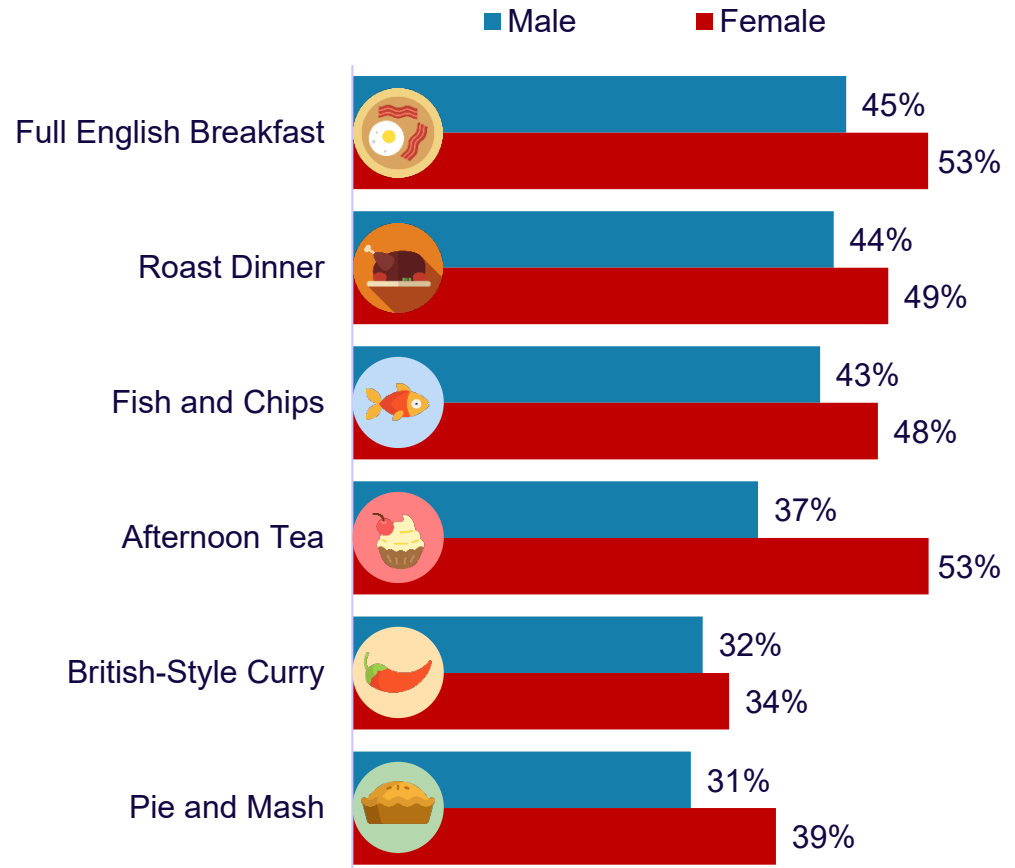
Gender

In general, women are more likely to be interested in trying British food, with a higher interest across all British dishes.

Interest in trying Afternoon Tea is a lot higher amongst women, taking joint first place and rating 16% points higher than for men.

The smallest gap for dish interest is for British-style curry, where a third of both men and women would be interested in trying this dish. This dish is in last place amongst women, whilst men rate it above Pie and Mash.

Interest in trying the following British foods (Extremely and Very interested)



Interest in trying British dishes

Markets

Brazil, Argentina and Mexico, the South and Central American markets, are most interested in trying British food with 66% of Brazilians interested in trying a Full English Breakfast.

Other English speaking nations (Australia, USA, Canada) are also relatively interested in trying British dishes, with the Roast Dinner ranking first in Australia whilst Fish and Chips is top in USA and Canada.

European nations tend to have similar opinions and have average interest in British food, although Italians are most interested in trying Afternoon Tea.

At the other end of the scale, Japan and South Korea are least interested in British food, with just 11% of Japanese interested in trying Pie and Mash.

Interest in trying the following British foods (Extremely and very interested):

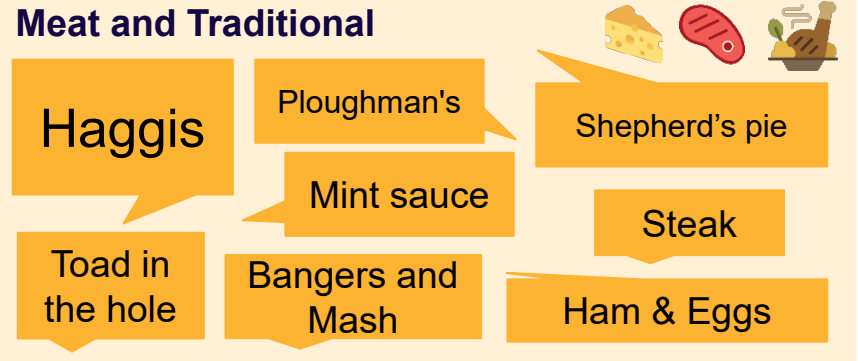
	TOTAL	Argentina	Australia	Brazil	Canada	Germany	France	Italy	Japan	Mexico	Poland	S. Korea	Sweden	USA
Full English breakfast	49%	63%	57%	66%	53%	46%	44%	44%	21%	63%	47%	29%	49%	52%
Traditional Roast Dinner	46%	50%	61%	56%	54%	36%	41%	43%	25%	64%	47%	35%	39%	53%
Fish and Chips	45%	37%	56%	57%	57%	39%	45%	44%	24%	52%	40%	31%	48%	56%
Afternoon Tea	45%	61%	53%	53%	46%	32%	39%	48%	26%	55%	46%	28%	48%	46%
British-style curry	33%	39%	36%	41%	29%	29%	34%	31%	22%	52%	36%	22%	32%	28%
Pie and Mash	27%	30%	38%	37%	34%	21%	27%	29%	11%	30%	25%	15%	27%	38%

Interest in trying other British food and drinks

Aside from the main dishes that we asked about, many are keen to try lots of different types of British dishes and foods.

There are two main themes coming through in particular – desserts and drinks. There is interest in trying British desserts such as cakes, puddings and pies which might be influenced by famous TV shows such as British Bake Off. In terms of drinks, beer comes through strongly, and in particular there are some references to craft beer.

Meat and Traditional



Seafood



Jellied Eels

Scampi

Fresh seafood

Drinks



Beer

Cider

Whisky

Tea

Sweet Foods



Cakes

Jelly

Scones

Plum Pudding

Pudding

Trifle

Apple Pie

Source: GFK NBI 2015. Imagine that you are going to be visiting Britain on holiday. To what extent would you be interested in trying the following British foods? 'Other'. Base: All respondents who selected that they would like to try a dish not mentioned in the list n=2,152



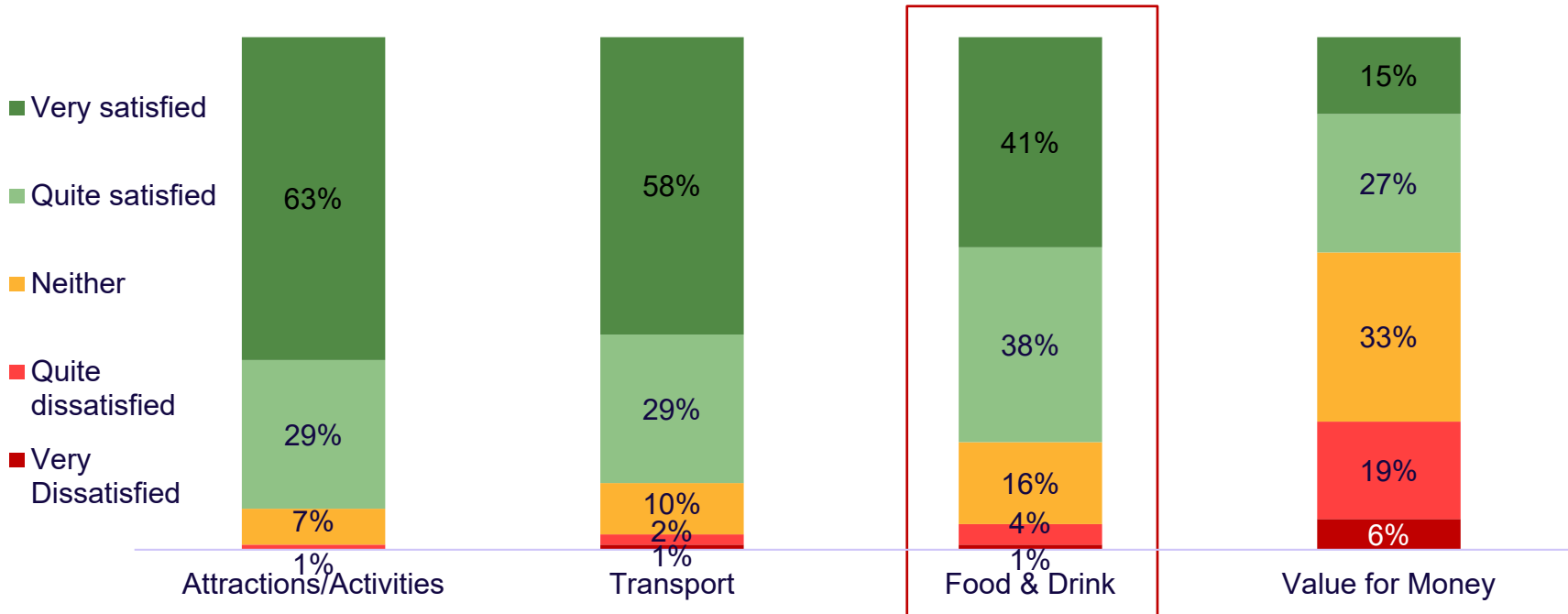
Experience of British food

Visitor satisfaction with Britain's food and drink

The majority (79%) of overnight visitors to the UK were satisfied with the food and drink that they experienced whilst in the UK, with 38% saying that they were 'very satisfied'. This shows that the experience of British food is generally positive.

However, food and drink does score lower for satisfaction than two other elements that visitors were asked about, such as attractions / activities and transport. This confirms again that attractions and activities are a strong selling point for Great Britain ahead of our food and drink. Food and drink still generates higher overall satisfaction than for 'value for money', which is the weakest score in this case.

Satisfaction with the following aspects during trip to UK



Source: ONS IPS 2015: How satisfied were you with your visit to the UK for: 'Food and Drink'. On a scale of 1 – 5. 26

Base: Departing overseas visitors who stayed at least 1 night. Total n=32,863

Visitor satisfaction with Britain's food and drink

Gender, Age, Journey Purpose

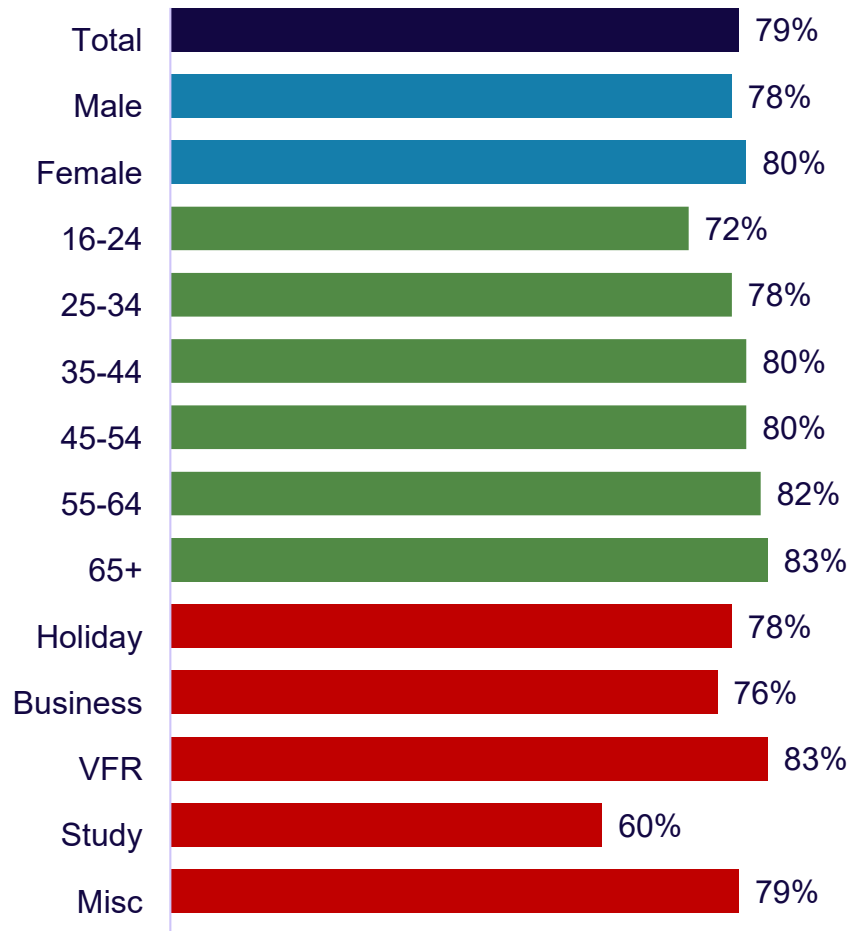
Women more likely to be satisfied with British food than men (80% v 78%).

There is a link between age and satisfaction, as those who are older have a higher satisfaction with British food, and those aged 16-24 have the lowest satisfaction (72%).

Holiday travellers rate British food similar to the average for satisfaction (78%), business slightly lower (76%) and VFR slightly higher (83%).

VFR travellers might have an advantage when staying with friends or relatives, with the ability to 'live like a local' and experiencing hidden gems that are off the beaten tourist routes.

Satisfaction with food and drink in the UK
(Very and Quite satisfied)



Visitor satisfaction with Britain's food and drink

Markets

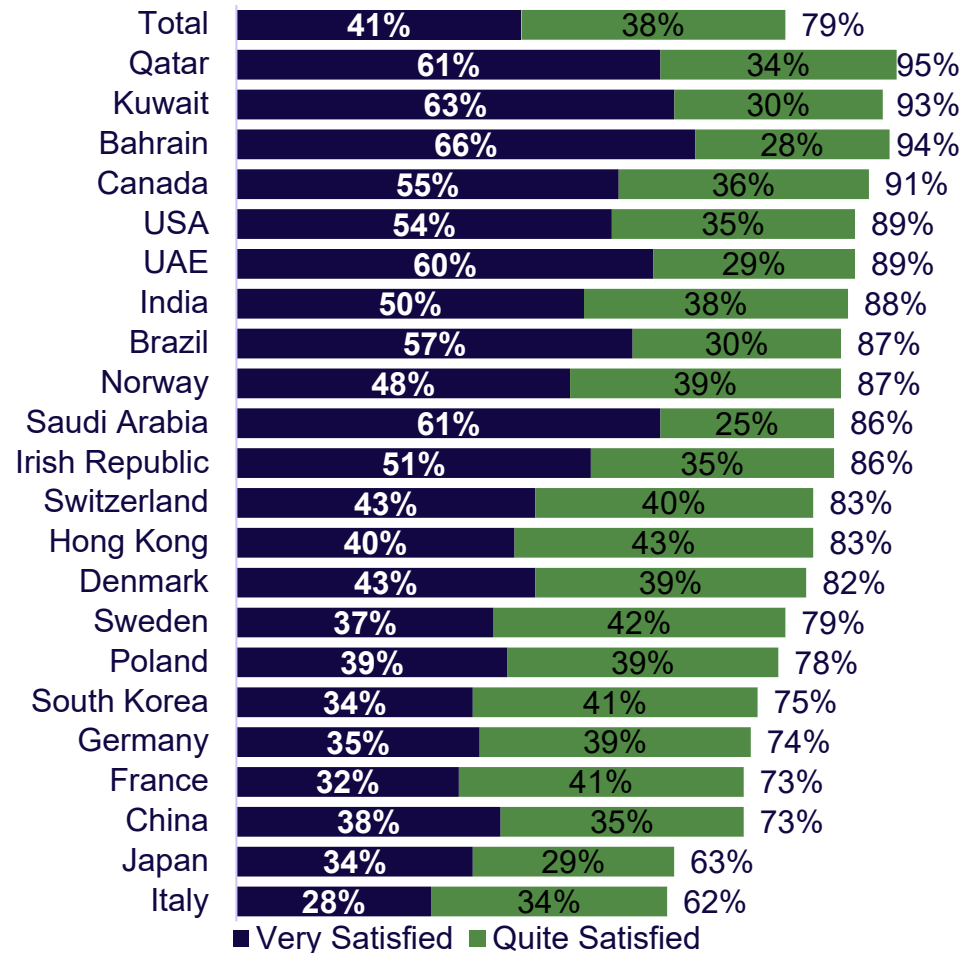
Satisfaction with food and drink experienced whilst in the UK is highest amongst Gulf states, with over 90% of those who visited from Qatar, Kuwait and Bahrain satisfied with our food.

Some other large long-haul markets, Canada, USA, India and Brazil also rate British food highly.

France, China and Japan are less satisfied with British food, with 73% of French saying they were satisfied, 73% from China and 63% from Japan.

Italy rates Britain lowest for food overall, with just 62% saying that they were satisfied with the food they experienced on their trip to the UK.

Satisfaction with food and drink in the UK





Appendix

Information sources used in this report

Source: Arkenford/VisitBritain

Study Name: Arkenford

Date: 2013

Sample: Online fieldwork. 1000 international travellers per market.

Markets: USA, South Africa, China, Saudi Arabia, UAE, Indonesia, Canada, Netherlands, Turkey, India, Australia, New Zealand, France, Germany, Italy, Japan, Mexico, Brazil, Russia, South Korea, Spain, Sweden, Singapore

Source: GFK NBI

Study Name: Anholt Nation Brand Index

Date: Annually, July (2014 and 2015 data used in this report)

Sample: Online fieldwork. 500 per market

Markets: Argentina, Australia, Brazil, Canada, China, Germany, Egypt, France, India, Italy, Japan, South Korea, Mexico, Poland, Russia, South Africa, Sweden, Turkey, UK, USA

Source: IPSOS/VisitBritain

Study Name: Decisions & Influences

Date: 2016

Sample: Online fieldwork. Up to 600 Visitors or Considerers to the UK per market

Markets: Australia, Brazil, Canada, China, India, Japan, New Zealand, Russia, Saudi Arabia, South Korea, UAE, USA, Denmark, France, Germany, Italy, Netherlands, Norway, Spain, Sweden

Source: ONS

Study Name: International Passenger Survey

Date: Continuous study, 2015.

Sample: Face to Face fieldwork. International visitors departing from the UK, sample size varies.

Markets: Australia, Bahrain, Belgium, Brazil, Canada, China, Denmark, France, Germany, Hong Kong, India, Irish Rep, Italy, Japan, Kuwait, Netherlands, Norway, Oman, Poland, Qatar, Russia, Saudi Arabia, South Korea, Spain, Sweden, Switzerland, Turkey, UAE, USA

Appendix

There is more general information about VisitBritain Research on our website. It is possible to find more detail about all of VisitBritain's priority markets, including the [latest quarterly data](#) from the International Passenger Survey, by exploring the [Insights & Statistics](#) pages of our website.

In addition to being able to manipulate data through a series of visualisations our [Market and Trade Profiles](#) provide a comprehensive summary of each market including trends, attitudes and characteristics.

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How the world views Britain's food

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