

**The potential for out of season breaks in
Cornwall and for the promotion of Cornish food
and drink to holidaymakers**

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Introduction

In July 2002, research was carried out with the aim of finding out more about people's experiences, perceptions and expectations of holidaying in Cornwall, with particular emphasis on eating habits and attitudes to food. The project was designed to ascertain primarily: -

- § Holidaymakers' likes and dislikes about Cornwall
- § The potential for out of season breaks in the county
- § The scope for the promotion of Cornish food and drink to self-catering holidaymakers, both during their stay and when they return home, through hamper and delivery schemes.

The purpose of the project was to inform the organisations Cornwall Taste of the West and Cartwheel and direct their work in developing and supporting the Cornish food and drink and farm tourism sectors.

1. Methodology

A largely quantitative study was carried out by means of a consumer questionnaire (see *Appendix A*), completed by visitors to the Royal Show, the annual show of the Royal Agricultural Society of England, held at Stoneleigh, Warwickshire, where 'Cornwall at the Royal' - a marquee dedicated to exhibiting the best of Cornwall's produce, crafts and attractions - has become a regular and popular feature over the last 5 years.

This was considered an appropriate opportunity to capture opinion from a wide geographical area, as the show attracts visitors from all over the country. It was also an opportunity to target those most likely to show an interest in the concepts being explored. A majority (although by no means all) of the show's visitors have an interest in agriculture, the countryside or rural affairs and are likely to come from the ABC1 socio-economic bracket. In addition, visitors to the 'Cornwall at the Royal' marquee, where most of the questionnaires were completed, can be assumed to include a predominance of people with some knowledge of Cornwall and Cornish produce. As an incentive to attract respondents, all questionnaires were entered in a free draw for a hamper of Cornish produce.

The study is therefore targeted and by no means intended to be a reflection of nationwide general public opinion or the views of *all* visitors to the county and must not be construed as such.

The questionnaire asked people who have holidayed in Cornwall what they most enjoyed or did not enjoy and asked those who have not visited the county whether anything in particular detracts them. This was designed to provide an overview of the target market's perceptions of holidaying in Cornwall. It also explored the potential for out of season breaks - long weekends, mid-week breaks, Christmas and New Year breaks and longer out of season breaks - all opportunities to extend the main visitor season in the county.

Questions relating to eating habits and attitudes to food explored firstly where self-catering holidaymakers usually obtain their food - the starting point from which any project attempting to change or exploit these habits must develop. Responses to the concept of receiving a hamper of local foods at the start of the holiday were then sought and this concept investigated further by asking respondents to consider what types of food they would like to receive; how often during their stay; whether they would prefer to choose the foods themselves; whether they would be prepared to pay for the convenience of having food delivered and whether they would be interested in receiving a hamper of Cornish goods once they had returned home.

In order to assess the scope for broadening the concept of making deliveries to self-catering accommodation, respondents were also asked whether they would like to receive deliveries of other items. The list could have been extensive, but concentrated on beers, wines and bottled water, maps and guides, food and drink gift items to take home and barbecue charcoal. These were selected as providing not only a service to holidaymakers but also a marketing opportunity for items known to be produced locally.

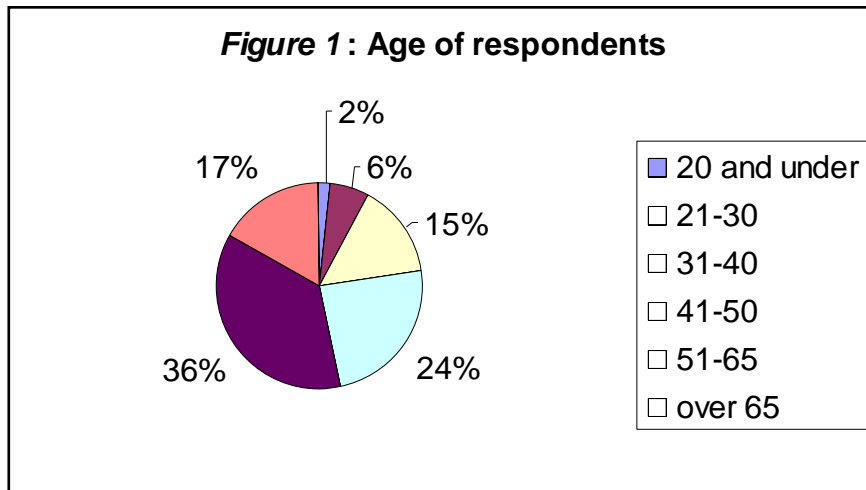
Age categorisation was included in the survey and then used throughout the analysis of the data, since this provides useful information for the marketing phase of any development of these ideas.

Data was investigated quantitatively and analytically, with various elements cross-queried in order to make the study as comprehensive as possible.

2. Results

2.1 Response rate

1003 responses were received, 77% of which were completed by respondents aged over 40. The breakdown of respondents by age group is provided in the chart below (*Fig. 1*) below, from which it can be seen that the number of respondents under 20 is only 2% and between 21 and 30 is 6% of the total survey group. Whilst this is broadly representative of adult holidaymakers in Cornwall, it also means that the sample for these younger age groups is very small and must therefore not be regarded as truly indicative of the attitudes of younger visitors to the county.



2.2 Perceptions and experiences of Cornwall

Respondents were generally very positive about Cornwall. 855 comments were recorded relating to enjoyable aspects of holidaying in Cornwall, whilst 317 comments were made about the county's unenjoyable or unattractive features. The geography of the county features strongly in making people's holidays enjoyable - scenery and coastal features being the factors singled out by most people. The third most enjoyable feature of holidays in Cornwall is food. *Table 1* below charts all the factors specified by at least 7 respondents.

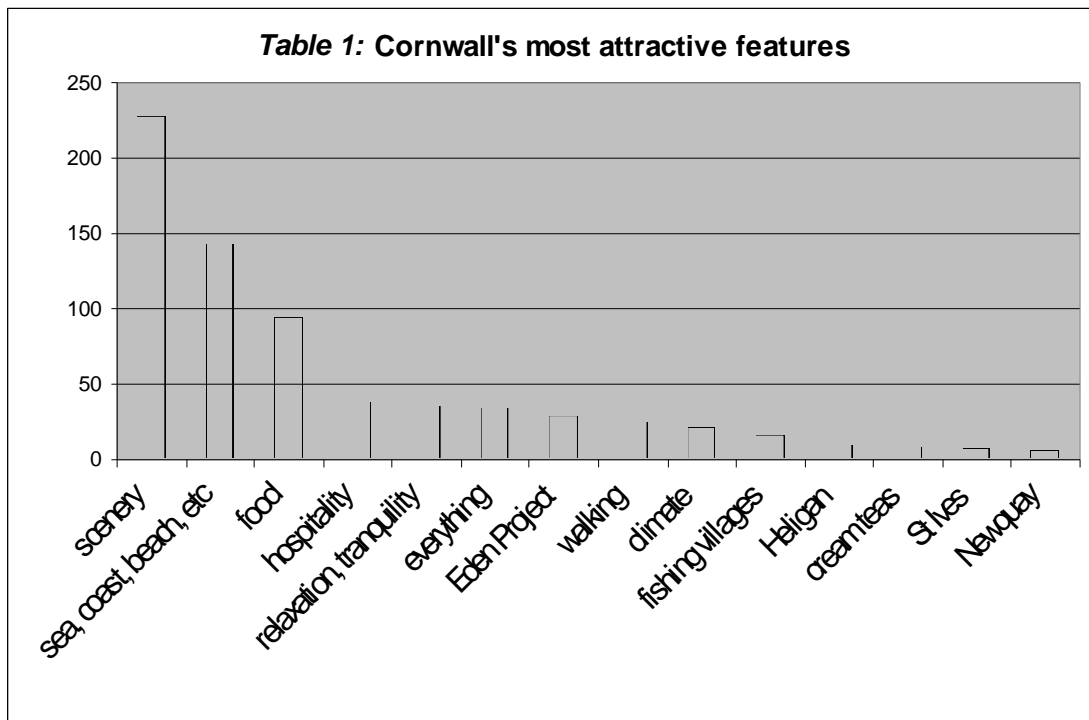
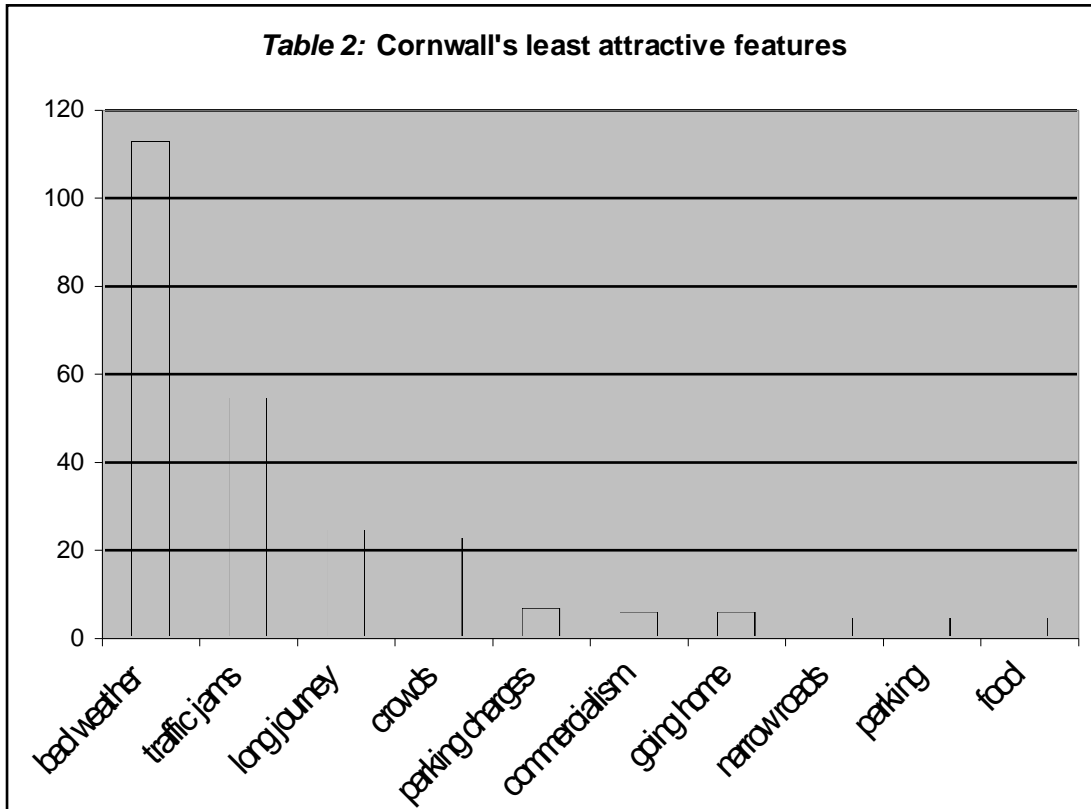


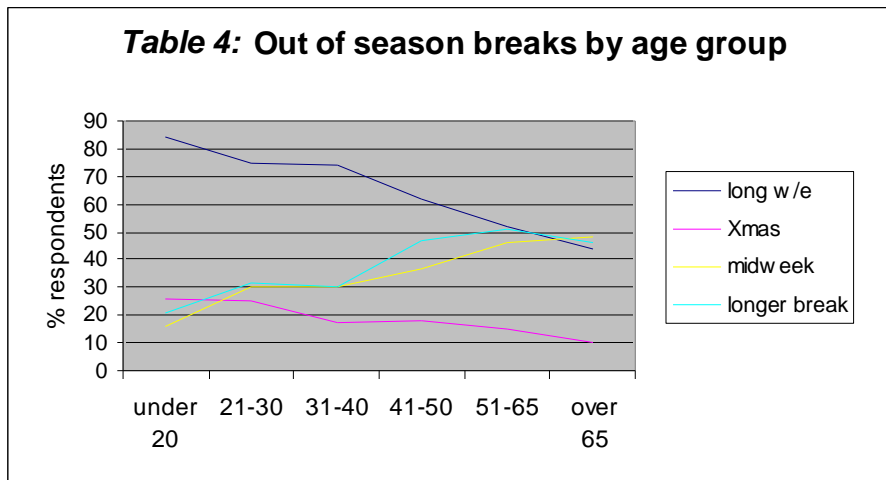
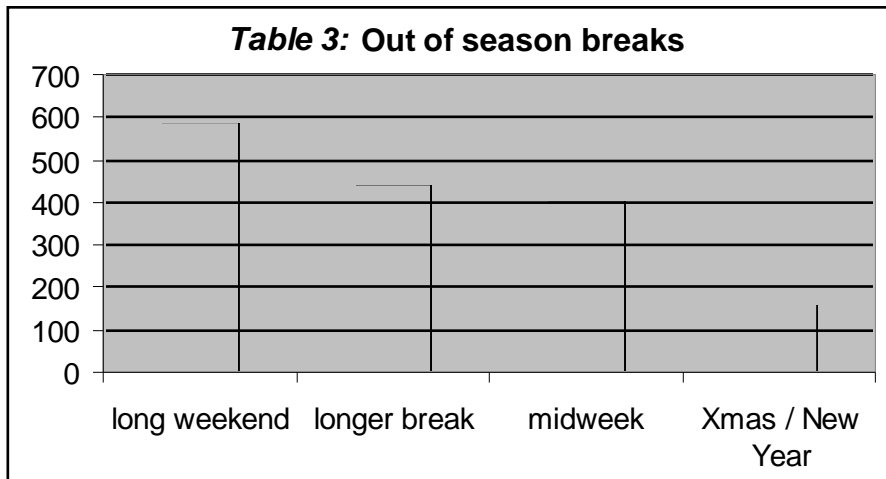
Table 2 illustrates quite dramatically that another geographical feature - bad weather - is the single most unenjoyable feature of holidaying in Cornwall. Traffic jams, the long journey reaching the county and crowds also feature significantly in this section. Other factors attracting at least 5 responses are included in *Table 2*, from which it can be noted that parking charges and parking difficulties, if combined as one factor, would also feature significantly. The complete list of responses to Questions 1, 2 and 3 of the survey is provided in *Appendix B*. The appearance of some items in both lists

reinforces the need to appreciate that tastes and preferences vary and pleasing everyone is impossible. It would be fair to say, however, that the natural beauty of the county is of paramount importance to visitors and things that interfere with it – crowds, traffic jams, commercialism – are those that deter. The fact that 'going home' appears in the list of things people like least and 'everything' appears in the list of things people like most about their Cornish holidays, is a measure of the amount of pleasure people obtain whilst visiting the county.



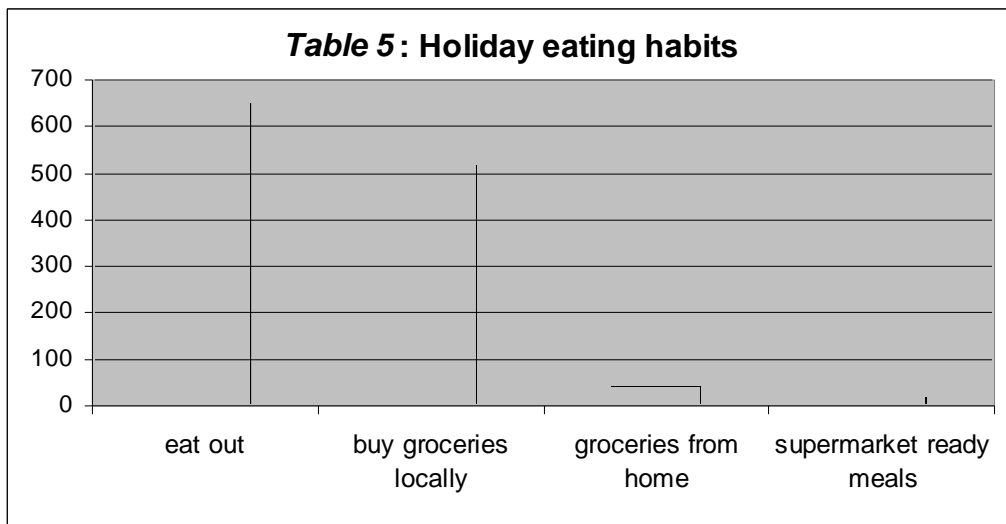
2.3 Out of season breaks

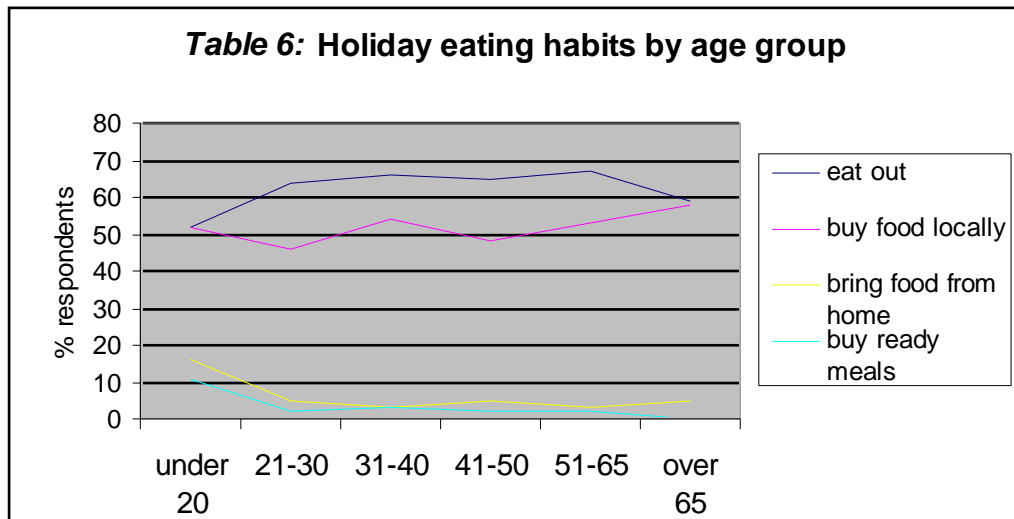
A large number of respondents was interested in taking out of season breaks in Cornwall; the long weekend break being the most popular concept, with almost 60% of respondents expressing interest (see *Table 3*). The type of out of season break favoured relates closely to age group, with younger respondents most interested in long weekends and Christmas and New Year breaks and the over 40's most interested in midweek and longer out of season breaks (see *Table 4*). This might be due to younger people being more likely to be working full time with, perhaps, a smaller holiday entitlement and budget than older respondents. Christmas and New Year breaks are also likely to be of more interest to those without family commitments and this is confirmed by interest dropping off from age 30.



2.4 Eating habits of self-catering holidaymakers

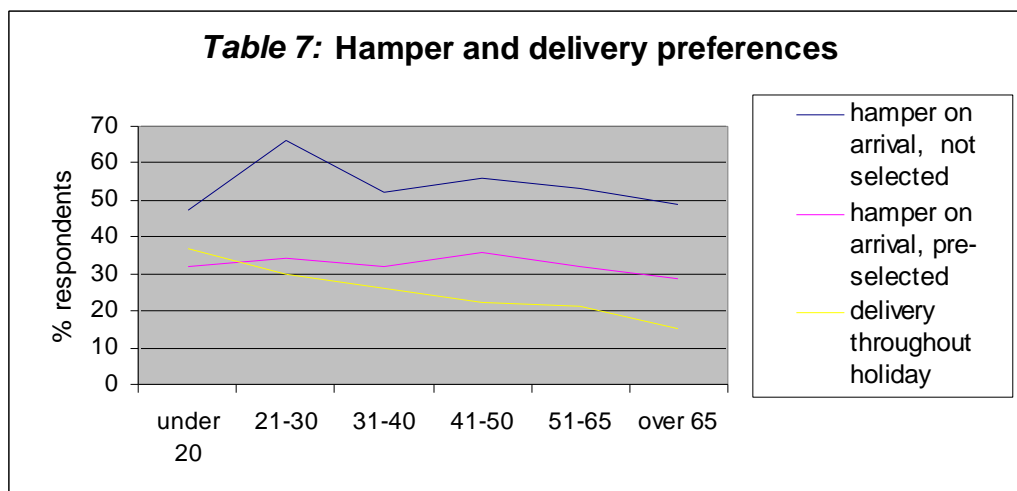
Most self-catering holidaymakers (65%) eat out as their main eating habit and more than half buy their groceries from local outlets. Very few bring their food requirements with them from home or buy ready meals from supermarkets and those who do so are in the youngest age bracket (see *Tables 5 and 6*). Enormous potential therefore exists for the promotion of local foods to self-catering holidaymakers, both through local retail outlets and local restaurants and other the hospitality sector.





2.5 Hampers and other deliveries

76% of all respondents were keen on receiving a hamper of food and drink on arrival at their self-catering accommodation, with most opting not to pre-select the contents. (see *Table 7* for age-related findings).



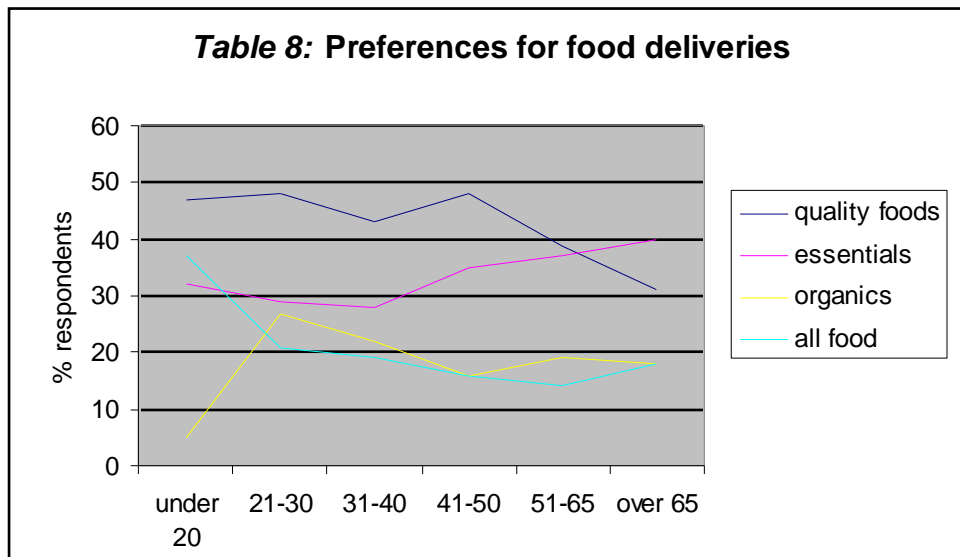
This could be because receiving a 'surprise' adds to the excitement of the holiday or because people are not prepared to go through a separate selection and ordering process, or do not feel they have sufficient knowledge of the products to select them for themselves and are happy to respect the judgment of those who do. Approximately 10% of all respondents expressed no preference between pre-selected and unselected hampers.

A significant number of respondents (22%) were interested in receiving food deliveries throughout their holiday and *Table 7* illustrates that the trend for this relates distinctly to age group, with the youngest being most interested and interest declining gradually with age. Over 16% of all respondents were interested in both a hamper on arrival *and* regular deliveries throughout their holiday.

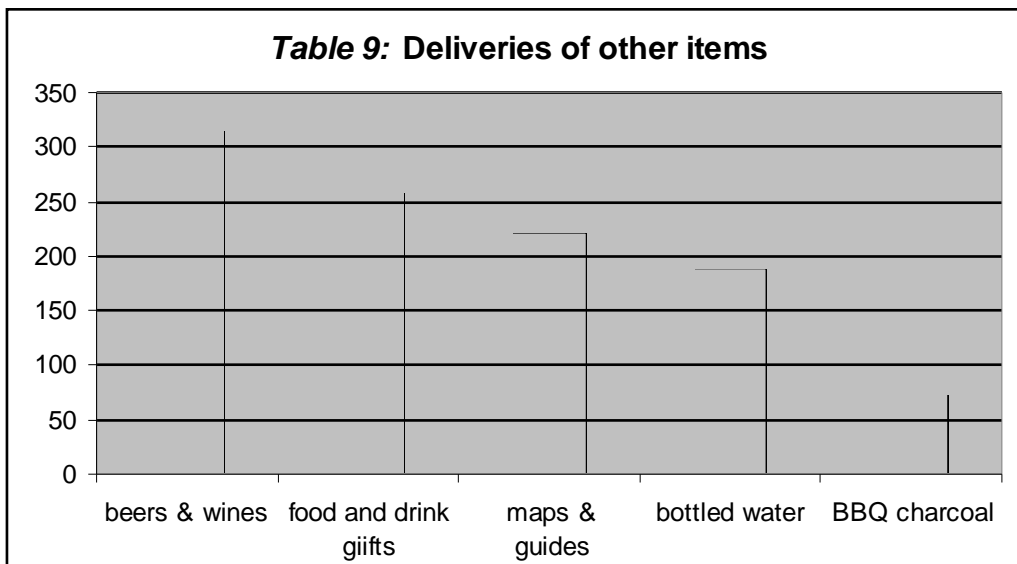
77% of respondents were willing to pay a little more for the convenience of having food delivered, although this survey was not detailed enough to explore how much 'a little' means in this context. In reality this is likely to mean between 5% and 10%, although care and perhaps some experimentation with overall pricing would be essential.

Whilst over 40% of respondents would like their deliveries to consist of high quality, speciality foods, a similar number (34%) are interested in basic, everyday essentials. 6% would like both. Nearly 20% are interested in deliveries of organic foods.

Preferences are again related to age. *Table 8* shows how older age groups have the strongest preference for basic foods and younger people prefer speciality foods. Younger people are also those most likely to be interested in having their complete holiday food requirements delivered, which may well relate to the fact that they are the group least likely to eat out. The 20-40 age group is the most interested in organics.



Over 30% expressed an interest in receiving deliveries of beers and wines during their holiday. *Table 9* shows that food and drink gift items, maps and guide books and bottled water also generated significant interest, although deliveries of barbecue charcoal less so. All other items suggested as being suitable for delivery are listed in *Appendix C*.



The concept of receiving hampers of Cornish produce by mail order once holidaymakers have returned home was received very positively across all age groups. Almost 60% of the total survey sample expressed an interest, with the over 65's slightly less keen than other age groups and the 41 – 50 age group the most keen with almost 70% responding positively. The questionnaire did not investigate the mail order hamper concept in more detail, finding out, for example, how often respondents are likely to require them or what price they would expect to pay, etc..

3. Conclusions and Recommendations

A survey such as this, covering several different themes in a short questionnaire, cannot explore every one of those themes in depth. It must also be borne in mind that expressions of interest are not the same as definite intentions. This survey must therefore be regarded as a measure only of *in principle* responses to the questions, which are likely to be more favourable than can be expected in practice. For example, not all of the 76% of respondents expressing interest in receiving a hamper on arrival at their self catering accommodation are likely to order one when presented with the opportunity. Price, content, presentation, marketing, location and even the weather are just some of the many factors that will influence their final decision.

However, whilst it is important not to rely too much on the numbers themselves, this survey used a sample sufficiently large for some very clear trends to be identified, with which a certain amount of experimentation and further research can take place during the development stage of initiatives.

Overwhelmingly, the response to the ideas explored in this study were positive and confirm not only that Cornwall remains a highly desirable holiday destination, enjoyed for its natural beauty and tranquillity, but also that holidaymakers are receptive to the prospect of enjoying more locally produced foods both during their holiday and when they return home. Food is already one of the main factors in making people's holidays in Cornwall enjoyable and a clear opportunity exists for local food producers, retailers and hospitality businesses to exploit this. The response to the questions relating to hampers

and other food deliveries demonstrates that there is enormous scope for this to be done in new and innovative ways.

The information relating to out of season breaks identifies opportunities for targeted marketing. Knowledge of the eating habits and food preferences of each age group whilst on holiday enables targeted marketing plans to be even more specific and presents opportunities for collaborative marketing efforts between the tourism and food industries. For example, because older people express interest in deliveries of basic, everyday essentials and in coming to Cornwall on longer out of season breaks, they can be offered a different 'package' to younger people coming to the county for long weekends, wanting to receive a hamper of high quality foods sufficient to meet the weekend's complete food requirements.

Examination of the data in this report will identify many other possibilities. What is clear from the response to this survey is that an incredibly receptive target market has been correctly identified and is more than willing to be part of potential developments in Cornwall's food and drink and farm tourism sector.

Appendix B

Features that holidaymakers like and dislike about Cornwall

Likes

Scenery
Sea/coastal features:
Coast
Beach
Sea
Surf
Fishing
Harbours
Food
Hospitality
Everything
Tranquillity/relaxation
Eden Project
Walking
Climate
Fishing villages
Heligan
Cream teas
St Ives
Newquay
Heritage
Clotted cream
Attractions
Nightclubs
Penzance
Padstow
Falmouth
Minnack
Tin mines
People

Dislikes

Climate
Traffic jams
Long journey
Crowds
Parking charges
Going home
Parking
Commercialism
Narrow roads
Food
Seagulls
Lands End
Newquay
Caravans
Accommodation
Cornish hedges
People
Dogs on beaches
Neglected towns
Poor beaches for dogs
Floods
Eden Project
Tate
Litter in car parks
Tourists
Poor mobile phone reception
Peak season
Gift shops
Amusement arcades
Boats

Appendix C

Other items suggested as being suitable for delivery to self catering holiday accommodation

Clotted cream (3)

Pasties (3)

Fish (2)

Farm produce

Crafts

Flowers

Logs

Newspapers

Speciality ice cream

Vegetarian products