Introduction to the report

With the publication of this report, VisitBritain (VB) and the Department for Environment Food & Rural Affairs (DEFRA) are addressing two long-term related objectives: to increase incremental volume and value of inbound tourism and regional spread; and to develop UK food exports.

Britain’s food tourism potential can be developed by:

- Creating a strong narrative/brand for Britain’s food culture
- Creating and promoting a consumer proposition around several target Food Hubs – regions with a strong potential to develop a tourism-friendly food offer
- Focusing on heritage, modern and innovative food and drink products within these food hubs
- Focusing on best fit consumer segments from Britain’s key inbound source markets

The partners have therefore commissioned case study research to gain insights into best practice in the field of food and drink tourism product development.

This set of case studies showcases successful development of food hubs around the world. Six major cases have been identified, and five secondary cases, including hubs in urban, rural and coastal areas. They focus on areas with significant potential, where local food producers and processors have, for the most part, received strong support from agricultural agencies and where the tourism authorities have taken an active role in developing food tourism.

In every destination, conditions will be somewhat different, in terms of climate, geography, demographics and regulations. A UK destination will not be able to copy directly from one in Spain, Australia or Iceland. However, most cities and regions of Britain should find cases of relevance and interest. In developing its own food hub strategy, a UK destination can learn from areas that have already addressed similar issues.

In particular, the cases will detail the strategic approach of the tourism and agri-food authorities with respect to the following:

- The market research and other initiatives that were undertaken to identify opportunities
- The methods that were implemented to comprehensively assess established products/services and potential food & drink products/services within a region
- Approaches used for stakeholder collaboration
- Development of new products/experiences and packaged itineraries commissionable for travel trade
- International distribution proposition and plan providing a route to market
- Trade and consumer engagement
- Partnerships and marketing plan
- Challenges and solutions.

The information is structured so as to assist the reader in evaluating, comparing and drawing conclusions.
Case Studies Overview
The case studies have been chosen for their potential interest to UK cities and regions. They reflect different strategies, but also share common characteristics. The six major cases are the following:

- **The first is Catalonia.** Over the last 20 years, this economically powerful ‘Autonomous Community’ has seen two revolutions, with regard to food and food tourism. On the one hand, a focus on quality produce and food products; on the other an ever-growing reputation for top gastronomy. This case study shows how the two can work together, each boosting the other. It also demonstrates how a major city (Barcelona) can act as a showcase for a rich regional food offer.

- **Melbourne** is an excellent example of an urban food hub. The city has taken advantage of its diverse food and drink offerings through fostering an innovative foodie culture, and creating thriving urban precincts. Many food and drink components have their origins in successive waves of immigration, with Melbourne now successfully positioning itself as a gastronomic hub.

- **Flanders** takes the case of a region with a climate and soil that is not so different from many regions of the UK, rich with market towns and rural communities, that has dug deep into its food traditions, and is steadily building a reputation for quality and innovation. The case demonstrates the power of a unified strategy, supported by the public sector, but driven primarily by chefs, growers, producers, and other local stakeholders.

- **Tasmania** is an example of a region that was previously known for agricultural production, but with comparatively little to offer visitors interested in original food and drink. Over a fifteen-year period, working closely with its agriculture, aquaculture and food & beverage sectors, it has established its rich natural environment as a direct source for their food offerings, and successfully grown food exports as a result. A common branding approach across these sectors has added significant value.

- **Nova Scotia** is the story of a province whose traditions of fishing and farming are essential to its identity, but which has suffered economically in recent decades. This case study looks at the strategies being pursued in achieving a turnaround and new prosperity, driven by a stronger export strategy and higher quality tourism.

- The **Basque Country** case explores regional identity, and how that can become a powerful driver of both tourism and the food economy. It is also an example of the positive impact of coherent and structured marketing, both internally, towards farmers, vintners, food SMEs, restaurants and local tour operators, and externally, towards the world’s tourism markets and potential importers of Basque produce and food products.
What makes a food hub?

Background
When visiting major food destinations of the world, the traveller may be struck by the importance that is given to food and drink in the everyday lives of the inhabitants, by the variety and quality of food in shops and restaurants and to the social status afforded to producers and processors of local food. Thirty years ago, the comparison between such destinations and the UK was stark, where the offer tended to be thin and the interest in the subject low. That is now much changed. Both in rural areas and in cities, the quality and range of food provided is significantly better. The importance given to well-produced and well-prepared food can be as high as in the rest of the world.

It remains the case that some regions, areas or cities of the world stand head and shoulders above others. When we talk of great food, the same names come up in conversation, over and over. Often, we speak as if this reputation for greatness results from a happy concourse of circumstances: the right climate, with the right products, mixed with certain traditions – as if there were no effort to be made by such destinations.

However, in the last ten years, we have seen new names of food hubs emerging. Australia, once considered a gastronomic desert, is forging a solid reputation. The cuisines of South-East Asia, previously seen as merely picturesque are now essential drivers of tourism and the economy. This is not accidental: it results from the work of many individuals and organisations, from small businesses to government agencies, each working in their own area of competence.

The Food Destination Development Framework
The case studies of this report consider these different areas of competence. They consider the wide range of components that make up a successful food hub. These can be presented in a diagram, as follows:

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Food Destination Framework

<table>
<thead>
<tr>
<th>Territory Assets</th>
<th>Tourism Assets</th>
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<tbody>
<tr>
<td>Natural Resources</td>
<td>Attractions</td>
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<td>Provenance</td>
<td>Accommodation</td>
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<tr>
<td>Identity</td>
<td>Connectivity</td>
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<td>Community</td>
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<td>Landscapes</td>
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Capacity

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<th>Enablers</th>
<th>Local Produce</th>
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<td>Production</td>
<td>Skills</td>
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<td>Ambassadors</td>
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The Food Experience

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<th>Gastronomy</th>
<th>Lead Products</th>
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<tr>
<td>Retail</td>
<td>Events</td>
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<td>Visiblity</td>
<td>Welcome</td>
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<th>Bookable</th>
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Understanding these components can give insights into the case studies that follow. The definitions of each are as follows:

The components of the Framework

Territory Assets

- **Natural resources** reference the wealth of the earth’s properties in the region and the use of these supplies to produce food.
  - Geology and climate for Champagne region
  - Fish stocks for Nova Scotia
- **Provenance** refers to the core food offer of the destination, for which the territory is and has traditionally been suited; in other words, its food heritage, in terms of its products.
  - Sheep in the Cotswolds
  - Shellfish in the Thames Estuary
- **Identity** is the extent to which a territory has a strong sense of identity, reflected in its shared history, its local pride, its dialect, or other characteristics.
  - Basque Country’s quality goat product reputation
  - Catalonia and its unique gastronomy closely associated to its separate language & culture
- **Community** is a reference towards the existence of local or nearby communities of food enthusiasts, supporting the territory’s markets and restaurants.
  - The well-populated and wealthy counties of Hampshire and Oxfordshire
  - The numerous French tourist that travel to Spain’s rural regions for traditional food

Territory & Tourism Assets

- **Landscapes** refers to the aesthetical natural or man-made qualities of an area that are pleasing to view for visitors.
  - Switzerland’s country side covered in small cottages
  - Australia’s untainted Whitehaven Beach with rolling white sand

Tourism Assets

- **Attractions** is the level of entertainment associated with food offerings in a region whether it is part of the eating experience or the journey to the venue.
  - Melbourne’s laneways, provide a fun and intricate way for tourists to venture from one food or drink local to another
  - Japan’s omakase tradition of anticipation of the next piece of sushi
- **Accommodation** is the availability and diversity of housing for visitors to enjoy. The focus is on the diversity in type of lodging and how disperse the concentration of house is in the region.
  - New York City’s diverse and abundant Airbnb offerings
  - Thailand’s unique housing options, from all bamboo tree houses to beach huts
- **Connectivity** is the ease to which the territory and its food offer can be reached and visited. It includes issues of transport, accommodation and quality of basic visitor services.
  - London’s abundant airports
  - Paris’s central European location
**Capacity**

- **Enablers** are public or private sector bodies or people who work with stakeholders, to bring them together and engage them, and help set up and drive initiatives, at every level.
  - Regional tourism organizations, such as DMOs
  - Dubai’s Visitors Bureau
- **Local produce** is the volume, value and interest of local produce, measured in part by the number and variety of farmers, fishermen and other primary producers, including those selling organically and to niche markets.
  - Alaska’s diverse set of salmon fisheries
  - The Bordeaux grape for wine making
- **Production** is the variety and number of companies preparing and processing food.
  - Concentration of cheese makers in the Basque Country
  - Processing power of fisheries in Nova Scotia to fillet and package to export
- **Supply chain** refers to the links between producers, processors and retailers, that facilitate the routes to market.
  - Boyne Valley’s main production brand helping smaller producers in the region with exports
  - Mexico’s well-established production, marketing and export of tequila supported by a public and private sector partnership
- **Skills** references the availability of skilled labour for production, food processing, and the restaurant trade. It also references the region’s public and private sector’s investment in the training of traditional food creation or handling, seen through investment in technical colleges, culinary schools, or chef understudy programs.
  - Basque Culinary Centre’s focusing on passing on traditional Basque recipes
  - Thailand’s Culinary Academy’s yearly battle of regional chefs
- **Ambassadors** are the number and quality of food and tourism professionals committed to helping develop the territory as a food hub, generally on a voluntary basis, by lending their name and skills.
  - Gordon Ramsey’s Chef Apprenticeship Programme
  - Mexican top chefs, such as Rodolfo Castellanos, promoting the use of amaranth, a traditional seed in today’s culinary recipes
- **Export** references the infrastructures and networks that facilitate and encourage companies to export, and the level of experience of local companies in this domain.
  - Singapore’s well-run ports for exportation
  - America’s railways across major cities in the East Coast

**The Food Experience**

- **Gastronomy** is the reputation of the area for high-quality cuisine.
  - The Thames Valley around Maidenhead with its three Michelin-starred restaurants
  - France’s numerous and high quality boulangeries
- **Retail** is referring to what people see in shops, in the streets and in the markets.
  - Local shops in West Country market towns
  - The bustle and hum of the great London markets
- **Lead products** refers to one products that have helped build the reputation of the territory for specific ingredients, products, food production processes or culinary experiences. They are products that are at the heart of an outsider’s reasons for visiting or buying.
  - Welsh lamb in Wales
  - Scottish Whiskey when visiting Glasgow
• **Events** is in reference to the number, size, and exposure of a celebration fully dedicated to food or with a strong component of local food.
  - Bordeaux’s Cité du Vin
  - Croatia’s on the road “Food Festival”

• **Bookable** (commissionable to travel trade) is the number, richness and interest of packaged and bookable food tourism products. These are provided primarily by private operators, including wine and food tours, cooking experiences, etc.
  - London’s food market guided tours
  - Catalonia’s rural farm stays

• **Visibility** refers to the clarity with which the territory’s food offer is promoted, using online media, and the reach and impact of that message around the world.
  - Visit Britain’s iconic logo located across major European countries
  - “Happy Cows Come from California” slogan made into a commercial

• **Welcome** the ease with which a visitor can come in contact with food and food stakeholders, whether on farms, factories, in the street or by the harbourside.
  - Catalonia’s rural farm stays in which visitors help producers make cheese
  - Wine tasting at one of Bordeaux’s wineries

Every destination will assemble these components of the Framework differently, with a different emphasis on one or the other, which will give their territory a unique profile. For example:

- A highly rural region may be very strong in natural resources, but lack the skilled labour to turn agricultural products into marketable products.
- A region already highly developed for tourism may have a strong gastronomic offer, with many quality restaurants, but little local produce on show, as the land is now used less for farming than for the provision of tourist services.

There are as many different possible profiles as there are destinations. Analysis according to the Framework will help any city or region understand their own specific profile and characteristics, their strengths and weaknesses, and their areas of opportunity.
Catalonia

Introduction
The Autonomous Region of Catalonia covers a surface area of 32,000 square kilometres: one and a half times that of Wales; and has a population of around 7.5 million. The Region has a long and rich farming tradition, over a wide variety of landscapes, from the Ebro delta to the Pyrenees, a distance of around 200 kilometres. To foreign tourists, Catalonia is best known for its capital city, Barcelona.

This case study is of a region that has been developing as a food hub for 25 to 30 years, whose ambition is to become and remain a world leader of high quality food and food tourism. It is also an example of the economic value of gaining a reputation for high-level gastronomy.

In addition, it is an example for UK regions that are home to a major city, where the strategic goal is to create a better balance between urban and rural areas, through the development of food tourism.
Relevance to the United Kingdom
Catalonia is roughly comparable, in size and population to England’s South West, including Bristol, Bath and Bournemouth. In some ways, it can be compared to Northern Ireland and Belfast, although Catalonia has a significantly greater population. There are some similarities with Yorkshire and York, also to greater Lancashire and Manchester. In both cases, there is a strong sense of regional identity.

However, throughout the UK, wherever there is an interest in quality food and food tourism, cities and regions can learn from the case of Catalonia, for whom this has been a strategic goal for several decades.

Summary
The flagship of the Catalonia’s food strategy is gastronomy. As of the 1980s and 90s, the Region was already making a reputation for itself for high quality cuisine, through the work of chefs such as Ferran Adria, owner and manager of the world-famous El Bulli restaurant. His example was followed by many others, and Catalonia now has 54 Michelin-starred restaurants.

Each of the original handful of great restaurants trained a number ‘disciples,’ who have in turn launched their own enterprises, getting continued support and encouragement from their ‘masters’. Over time, each of the four provinces of Catalonia has become home to quality restaurants, even in remoter rural areas, forming a skilled community or network that shares common values and goals.

(http://www.llull.cat/english/cultura/gastronomia_cb.cfm)

These chefs have also served as ambassadors for Catalan food, at every level:

- Internally, they are the inspiration for local ‘collectives’ of food professionals, which include producers, processors and retailers, and serve to raise and maintain standards;
- For the international market, they work with both the tourist and agri-food authorities, to help spread the message worldwide.

In parallel, the agricultural sector has undergone a major transformation. Food and agriculture are still major pillars of the economy. Although the primary sector has greatly diminished in importance, processed foods and beverage from Catalonia are making inroads internationally, in importance, as is the wine industry.
In terms of the Food Destination Framework, the focus for this case will be on: Gastronomy, Enablers, Skills, Ambassadors, Community, Identity, and Bookable

### General background

For historical reasons, Catalonia has a strong sense of its own identity. The concept of ‘Catalan food’ is therefore well understood by the population, and well communicated to visitors.

In the 60s and 70s, Catalonia experienced rapid economic growth, driven by industry and tourism. The latter was given a massive boost when Barcelona hosted the Olympics in 1992, an event that positioned Barcelona as a world city, and as a fashionable urban centre.

In the same period, the agricultural sector was undergoing a transformation, away from primary agricultural products and low-cost processed products, such as wine, to higher margin processed food and beverage, in response to aggressive competition from southern Spain and Morocco.

As of the early 2000s, largely thanks to the media attention generated by Catalonia’s celebrity chefs, the tourist authorities began paying increasing attention to food and beverage as a promotional message. Over a decade, the idea developed of creating a major food hub, where both agriculture and tourism would have a role to play.

### Triggers for Establishing Catalonia as a Food Destination

The decision to invest time and resources into the development of Catalonia as a food hub was driven by a number of factors, highlighted in this case study. In summary, they include:

- The dropping of food prices over the last decades of the 20th century, which led to a fundamental rethink of the agricultural sector and, in particular, to the decision of most producers to aim for superior quality;
- The growth of Barcelona as a major world destination for tourism, as of the 1990s;
- The celebrity of top chefs and restaurants, such as those of Adria and the Roca brothers; the interest that these drew from the world’s media; and the fact that most of the great restaurants were founded outside of Barcelona;
- And, last but not least, the Region’s economic ambitions, driven by a certain sense of identity and independence.

In the case of Barcelona at a time when serious concerns are being expressed about tourism in the city of Barcelona. Mayor Ada Colau has identified mass tourism as a threat to community life, as rents have sky-rocketed and public spaces been taken over by tourism and, in Barcelona, the policy is increasingly to manage and restrict, to limit overcrowding in the city centre. This acts as a further incentive to the tourist industry to promote products that involve visits to the broader region.

Food tourism is good vehicle for such a policy. Food enthusiasts are, it is believed, more open to tourism offers that take one off the beaten track, to discover new horizons.

**Economic Context**

**Tourism**

Catalonia has seen a steady increase in tourism across the last few years, hitting 18 million tourists and a 4% growth in 2016. ([http://barcelonacatalonia.eu](http://barcelonacatalonia.eu))

<table>
<thead>
<tr>
<th>Tourism Statistics as of 2016</th>
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<tbody>
<tr>
<td>Category</td>
<td>Value</td>
</tr>
<tr>
<td>Percent of tourist to visit Spain and visit Catalonia</td>
<td>22.5%</td>
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<tr>
<td>Foreign tourist spent</td>
<td>€823 million</td>
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<tr>
<td>Average spent per tourist</td>
<td>€968</td>
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<tr>
<td>Tourism % of overall GDP in Catalonia</td>
<td>15%</td>
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**Agriculture & Food**

Catalonia considers itself to be the ‘first agri-food cluster in Europe’, on a level with nations or regions such as Denmark. Food and beverage represent over 10% of the economy. Only small portion, roughly 1%, corresponds to primary agricultural products from farm, forestry, and fishing.

The graphic below gives an indication of the speed of development of the organic sector, where Catalonia intends to position itself as a leader, with a focus on both cereals and wine. ([http://www.elpuntavui.cat](http://www.elpuntavui.cat))
Competitive Strategy
Over the last five years, between Catalonia’s Ministry of Tourism and the Ministry of Agriculture and Food, a shared strategic vision has emerged:

- To shift the focus of tourism from the saturated city destination of Barcelona to the autonomous region as a whole
- To use food and drink as a means of increasing the value and interest of rural areas, in particular filling ‘the tourism gap’ between Barcelona and the Pyrenees
- To position the Catalan food and drink offer as premium, thereby adding value to food production as a whole
- To use the city of Barcelona as a showcase for Catalan food, to demonstrate its interest and quality to an influential pool of food tourists

In this vision, the gastronomic restaurants of Catalonia (both in Barcelona and in rural areas) have had an important role. However, they are one component among many and for Ramon Sentmarti, Director of PRODECA, the core of the strategy is rather the building of value around the products. “We learnt from the Italians, who don’t have the celebrity chefs, but who know how to build up the reputation of their products.”

Catalonia does, in fact, have the celebrity chefs, and gastronomy is recognised as essential to the Catalan food strategy. In 2016, PRODECA produced a ‘Gastronomy Plan’ for Catalonia, with chapters on production, tourism, health, education, and innovation. The strategy is supported at a local level by formal or informal groups or ‘collectives’, that work to develop and promote the food traditions of different parts of Catalonia. One of the best known is in the volcanic area of Garrotxa, proud of its fertile soil and promoting a ‘Volcanic Cuisine.’ In the Ebro delta, a group has formed around the nautical base of La Rapita. In other cases, it might be a university or professional training college. The groups are primarily inspired and driven by chefs of well-known restaurants, promoting local traditions and the use of local products.

The collectives are a key component of the strategy, and are supported by the regional authorities.

With regard to agri-food, Catalonia is extremely active on the international scene, with presence at food-related fairs and events worldwide. Producers are strongly encouraged to participate and to use this promotion. Support at international fairs is regularly provided by top chefs from the region. The Barcelona tourism authorities are skilled and sophisticated, and that expertise and professionalism has spread to the Region as a whole.

These efforts have had such a success in meeting their goals that in 2016 Catalonia was elected European Region of Gastronomy, and also received an award for ‘Best promotion of gastronomy in tourism’ (Ireland).

Food Hub Development
In terms of the Framework this case focuses, on the one hand on the ‘Capacity’ elements, including the Enablers, the Ambassador activities, the skills development and the ambitions to Export ambitions; on the other hand, how Gastronomy has served as a driver for all elements of the Food Experience.
Capacity

Production
A major shift has been taking place from volume production to higher margin quality production. This is in part due to competition (e.g. fruit and vegetables from the western and southern Mediterranean), more suited to intensive production. In part, it is also the impact of a new generation of farmers and food processors, with a higher level of technical skills and a greater awareness of international trends.

The new generation is receptive to initiatives that can help boost the reputation of Catalonian products. However, the goal of adding value is primarily effective for processed foods (wines, oils, hams, cheeses, conserves, and suchlike), in particular those that can obtain quality labels or regional production certification.

Local Produce
Seafood is a part of the mix, but a modest one. Catch volumes along the Mediterranean coast are not high. Only a relatively small proportion of the seafood served in restaurants is, therefore, of local provenance. However, for more up-market restaurants, and for the overall image of food in coastal area, local catch remains important.

Export
Presence at international industry events, with a very focused message, has paid off. According to Ramon Sentmarti, Catalan food products are increasingly recognised worldwide in the food industry, and enjoy a quality image. A secondary effect of such events has been to mobilise companies, encouraging them to integrate the image of Catalonia into their branding, and to seek new markets.

The large number of protected designation of origin (PDO) and protected geographical indication (PGI) of Catalonia, currently at 21, has also helped maintain a uniform recognition at the international level, with such goods as ganxet beans, oil from L’Epopdá or potatoes from Prades.

A ‘Catalan Day’ was recently organised in Japan, with the involvement of Michelin-starred chefs, in support of promotional sales of Catalan products in the major cities. The interest of Japanese importers has grown since celebrity chef Carme Ruscadella opened her Tokyo restaurant Sant Pau de Toquio in 2004.

Enablers
There are top-quality restaurants across the whole of Catalonia, many founded by the disciples of the first celebrity chefs. This pool of talent helps drive the cuisine groups and food collectives that have sprung up throughout Catalonia (see ‘Competitive Strategy’). They are present at fairs, festivals and markets, demonstrating their cooking skills and showcasing their local recipes.

The Alicia Foundation was created in 2003 by chef Ferran Adrià of El Bulli fame and cardiologist Valenti Fuster. Its initial goals were to undertake scientific research into culinary products and processes, for social, cultural and medical purposes. In 2007, the Generalitat de Catalunya helped fund new headquarters, and has supported its outreach goals: into schools, restaurants, hospitals and other organs of civil society, and well as into the food industry. For the outside world, it is a further proof of Catalonia’s top-to-bottom engagement in innovation and quality.

The Food Experience
Gastronomy
Interestingly, few of the great Catalan chefs, including Ferran Adrià, the Roca brothers and Carme Ruscadella, made their reputation in Barcelona, although in several cases, they have subsequently opened satellite restaurants in the city. They have drawn a wealthy and
influential clientele to otherwise little-known rural areas, and put towns such as Girona and Saint Pol de Mar on the foodie map.

Overall, 54 Catalan restaurants are Michelin-starred.

**Retail**

At the local level, the brand is visible, in particular in the cities. Barcelona is, literally, a shop window for Catalan food: an attractive tourism feature which also reinforces the local sense of identity and pride in its cuisine.

The casual visitor cannot help but notice the local provenance in shops in and around the centre: ham, olive oil, wine, processed fish, breads, etc.

Provenance and respect for local tradition are also to be found in Barcelona’s restaurants. In certain heavy tourism areas, there is a tendency towards standardisation, with low-cost Paëlla and tapas of mediocre quality. But the visitor can easily find a quality meal a few hundred yards from the Ramblas, in restaurants where the dishes may need an explanation from the waiter, and the ingredients are sourced in one of the city’s busy markets, that sell local produce.

**Events**

Showcasing the gastronomy of Catalonia has proven to be a worthy investment not only to increase the international consumption of products and services, but to also attract tourist and experience the food and beverage first hand. In 2016, the Catalan Tourist Board (ACT) organised a series of promotional activities revolving around what the campaign “The Year of Gastronomy and Wine Tourism.” The calendar of food and wine fairs and festivals featured 26 regional events, with only 4 events held within Barcelona.

**Bookable Products**

The tourism strategy is event and initiative-driven. A good example is the ‘Welcome to the Farm’ initiative: a region-wide ‘open house’, backed by training and workshops for participating producers. The first year was 2015, lasting several weeks and attracting 15,000 visitors. Catalonia is now working to make it an annual event, with a greater focus on foreign visitors.

### Top-Seven In-bound Markets 2016

(percent of total international visitors)

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<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>France</td>
<td>25%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>11%</td>
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<tr>
<td>Germany</td>
<td>8%</td>
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<tr>
<td>Italy</td>
<td>7%</td>
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<tr>
<td>Belgium and Netherlands</td>
<td>6%</td>
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<tr>
<td>Nordics</td>
<td>4%</td>
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<tr>
<td>Switzerland</td>
<td>2%</td>
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Source: IDESCAT
Other initiatives are towards the creation of food and wine themed itineraries, for example cheese routes (more than 100 varieties); or mixing heritage and gastronomy, for example linking castles or monasteries with vineyards or olive oil production.

Museums allow visitors to take a deeper dive into the gastronomy of dishes – learning about the traditions and customs related to Catalonian cuisine.

Relations with the tourism private sector are well-developed. The Barcelona tourism authorities have established links with the world’s tour operators, and assigned significant budgets towards the development of these relationships. For example, there is a close connection between the Association of Tourist Apartments (APARTUR), the Catalan Association of Tourist Boarding Houses (ACATUR) and the Catalan Travel Agency Association and the Catalan Union of Specialist Travel Agents (ACAV-UCAVE), which has helped improve the sector together by cofounding projects in the tourism sector. It is also worth mentioning collaborative business projects joining ICTs and the tourism sector, in the following initiatives:

- Joint initiative with Mobile World Capital to promote the MTourism programme to link the cultural tourism sector to new technologies companies.
- Coordination between IMI and Strategic Sectors’ management.
- Collaboration with Fòrum TuriSTIC organised by Bdigital as part of the International Tourism Fair of Catalonia (SITC) framework.
- Advisory services for a variety of business and entrepreneurial projects.

In the Region and city’s presence at major trade shows and in their promotional literature, the focus is now shifting from Barcelona to Catalonia as a whole. The same shift can be seen through the increased availability of hospitality in the region. (See ‘Results’)

(http://ajuntament.barcelona.cat/turisme/sites/default/files/documents/150514_the_tourism_sector_eng_0.pdf)
Food tourism is essentially driven by the private sector, which provides an exceptional range of food tourism experiences, and initiatives that attract tourist to the source of food and beverages to receive an educational and memorable experience. Many restaurants offer a similar experience to visitors looking to learn how to cook by organising cooking, cooking and wine paring, or wine pairing courses. Markets provide a platform for tasting dishes and sourcing ingredients.

Food tours offered by the private sector include products from Devour Barcelona, Barcelona Slow Travel, and Castlexperience, to name a few. Despite the names, the tours are increasingly covering the rural areas of Catalonia.
There, however, particularly rich opportunities for food tourism in Barcelona. On the official website, you can choose from an array of food tours ranging from exploring the fish menus at the Barceloneta, a fisherman’s quarter of the city, to walking through Barcelona’s famous Poble-sec neighbourhood which is a hub for local bars.

Through a quick review of the region’s tourism sites, you will notice that they all share a focus on promoting food and drink experiences. It no longer sufficient to provide tours, these sites are now full of cooking classes, regional visits and tastings, or fishing expeditions. There is a clear focus towards experiential food tourism offerings in Catalonia, benefiting from their long standing excellent food reputation.

The increased focus on commissionable travel trade by the Catalonian government comes from their push to promote more sustainable tourism due to the large influx of yearly visitors, at 5,871,536 visitors in 2015. The Barcelona 2020 vision for sustainable tourism identifies investment in providing tourist a more experiential visit that will integrate them to the region giving them a sense of place.

(https://ajuntament.barcelona.cat/turisme/sites/default/files/documents/the_catalunya_2020_vision_for_responsible_tourism_-_the_barcelona_declaration_eng.pdf)

**SWOT Analysis**

**Strengths & Advantages**

Regarding the Food Hub Development Model, the reasons for Catalonia’s successful development as a food destination are not primarily to be found in its basic assets, although the region has natural resources, in terms of climate, soil and landscape, and a rich and documented food heritage. This is the case in most Mediterranean areas, but few have taken advantage of these assets as Catalonia has done.

Catalonia has built up its capacity as a food hub over a 30-year period: producing quality wines, conserves, olive oil and other food products; exporting to a level that other regions would envy; actively seeking out new markets and developing its commercial skills. At the same time, transforming gastronomy into an economic driver, with a network of top-quality restaurants, emulated by many more, that work with local producers and actively promote the region’s cuisine.

As a result, the Autonomous Community can now boast a mix of food and tourism assets that can form the basis of new food products and a new and innovative food tourism offer. In recent years, records have been established for the region’s overall tourism success.
Catalonia benefits from certain advantages:

- As in the Basque country, the widespread use of Catalan provides a discreet additional 'flavour' to local foods and dishes, and differentiates the dishes.
- Food professionals also insist on the distinctive nature of Catalan food, a view shared by the population as a whole. This sense of identity is shared by all Catalans, urban or rural.
- In general, there are excellent political relations between the Junta de Catalonia and that of the metropolis of Barcelona.

Challenges/Weaknesses
The main challenge is to stay ahead of the pack, as more and more regions position themselves as food hubs. PRODECA and the tourism authorities are aware that they cannot take their leadership position for granted.

In the implementation of this strategy, the following issues have emerged:

- A need to engage food producers and processors who have not, in the past, been involved in tourism
- A requirement for a constant focus on quality
- The need for innovation, for the region to stay ahead of its competition, in a world where more and more regions are positioning themselves as food hubs

Results
Barcelona still remains the tourism hub of Catalonia. However recent studies show that the drive to develop rural tourism and to ‘disperse’ tourism flows to the four provinces of Catalonia is showing signs of success.
Vacation rentals in rural areas are following the trend, with such companies as Escapada Rural having more than 2,000 listings available in Catalonia.
LEARNINGS
Through the case of Catalonia one can draw, in particular, five lessons applicable to UK destinations:

- Firstly, Catalonia is of interest to areas of the UK where regeneration of rural areas is a goal. Catalonia demonstrates that a comprehensive food offer, with multiple components - farming practices, food processing, gastronomy and tourism promotion – can be transformative. In the case of Catalonia, it has brought hope and energy to remote areas that would otherwise be in decline.
Secondly, the case shows that the tourism and agri-food sectors can complement each other. Tourism development alone will not generate a rich and sustainable food offer; and the food/agriculture sector does not have the skills to promote and package as needed. Such a collaboration needs to be at every level. In the case of Catalonia, it has been a deliberate and long-term strategy, leading to the 2016 designation as a European Region of Gastronomy. As always, such a designation is the tip of the iceberg, hiding years of hard work and determination by the partners concerned.

Thirdly, the case addresses the issue of complementarity and collaboration between a region and its major city. It does not provide answers: in the case of Barcelona and Catalonia, it is still work in progress. The strategy of dispersing tourism more widely is in its earliest phase. However, the case does highlight the potential role of food tourism in establishing a link between urban and rural experiences.

The case illustrates, in any case, the importance of aiming high: focusing on quality and differentiation. These values, essential in a competitive world, have underpinned every initiative.

Last but not least, the case of Catalonia illustrates the power of a reputation for superior gastronomy. Catalonia was ‘lucky’ to have been the cradle of a number of great chefs, in the late 20th century. However, the development of their activities was undoubtedly boosted by targeted investment in skills development and in agricultural and food tourism promotion.
Flanders, Belgium

Introduction

Flanders is the northern, Dutch-speaking region of Belgium. It is one of Europe’s most densely populated areas, with 6.4m citizens inhabiting an area of 13,500 square kilometres, (slightly smaller than Yorkshire). The region is a mix between urban cities Brussels (population 2m), Antwerp (500,000), Ghent (250,000), Bruges (120,000), Leuven (100,000) and agriculturally fertile rural areas. For international visitors, Flanders is best known for beer and chocolate.

The case study covers a region with a strong primary producer base, particularly agriculture and livestock farming, an existing local prevalence for gastronomy, and innovative private sector. Flemish food is a key strand of Government policy. For the past 10 years, Government agencies, private sector networks and business have worked together to develop strategy and support initiatives that will see Flanders recognised one of the world’s top culinary destinations by 2020.


Relevance to United Kingdom

Flanders covers 44.8% of Belgium, has a 40-mile section of North Sea coast, temperate maritime climate and favourable soil composition which makes it ideal for growing vegetables. It is a region of intensive agricultural output, where traditional farming and food production skills have been handed down through generations to create a rich and diverse food heritage. There are similarities with areas of the East Midlands; especially Lincolnshire and Leicestershire, and to Shropshire.
Destinations looking to expand their focus on food and drink as a differentiator will find interest in the level of political and strategic support, the product development infrastructure, cultivation of passionate food ambassadors and marketing initiatives centred on lead products.

**Summary**

Flanders primary production and food innovation heritage dates back centuries. Local consumers consider themselves ‘bon viveurs’ who demand high quality food and drink. With a restaurant for every 364 citizens, there is a rich dining culture and a narrow gap between ‘fine dining’ and the average corner brasserie.

Yet despite the highest concentration of Michelin star-rated establishments per head of population anywhere in the world, (97 in 2017), 167 recognised regional products and seven under European protection, wider, international, recognition of the region’s culinary excellence was not forthcoming.

After consultation, the 2009-2014 Government policy memorandum deemed the national tourism agency was failing its primary remit to facilitate economic growth. It was restructured and mandated to provide stronger levels of support for the tourism industry.

When Gert De Mangeleer was named Best European Chef of 2014 at gourmet trade show Madrid Fusion, it launched Flanders international drive for recognition as one of Europe’s leading gastronomic regions.

Government agencies, networks, chefs, growers, producers and tourism businesses collaborate on initiatives to improve reputation, attract tourists and drive exports. The subsequent Government policy memorandum (2014-2019) sets out an intention for Flanders to be recognised as one of the world’s top culinary destinations by 2020. Key supportive steps include:

- VisitFlanders focus on food as one of five world-class products which provide differentiation from competitors, with appropriate resources allocated to doing these five things extremely well;
- The ‘Flanders for Foodies’ programme manager, became part of VisitFlanders and now heads a team of five food and drink specialists tasked with developing the quality of available food products and experiences;
- Launch of a food manifesto, which celebrates the artisan craft of producers and their innovation, rather than the narrower focus on the products themselves;
- Creation of the Flanders Kitchen Rebels, a group of 25 accomplished chefs under the age of 35, who are re-inventing Flemish cuisine in a cutting edge, contemporary manner, and travel the world to support the wider promotion of Flemish ingredients and gastronomy;
- Ministerial support where there are opportunities to boost the profile of Flemish food.

While possessing many of the following framework attributes, for the purposes of this case study stand out elements in the development of Flanders as a food tourism hub relate to **Enablers, Ambassadors, Gastronomy, Lead Products, Events and Natural Resources**.
General background
The Flemish Parliament includes the Government of Flanders (nine ministers who are in office for a 5-year term), and the Flemish administration (subdivided into 11 policy areas). Ministers use policy memoranda to identify key strategic policy choices for their term of office. The current policy memoranda cover the period 2014 – 2019.

Three Flemish government departments have a collective presence as International Flanders: The General Representation of the Government of Flanders, Flanders Investment and Trade, and VisitFlanders.

The most popular tourist cities in Flanders are known as the “art cities” and include Bruges, Ghent, Antwerp, Brussels, Mechelen and Leuven. Cities account for nearly 70% of total of international arrivals. Popular Flemish regions include the fruit-growing area of Haspengouw, the pastoral Maasland along the eastern border of Flanders, and Meetjesland in East Flanders province, known for its lakes.¹

Oostduinkerke in Western Flanders is the only place in the world where the tradition of “shrimping on horseback” is still practiced. It was inscribed to UNESCO’s list of Intangible Cultural Heritage in 2013, followed three years later by Belgian Beer Culture.

Interest and support for gastronomy is a defining part of Flemish identity. However, the agriculture, production and wider food offer is not internationally recognised, and Flanders desires to be known for more than beer, chocolate and waffles.

¹ http://www.flanderstoday.eu
Triggers for establishing Flanders as a food destination

By the mid-2000s, trend predictions were showing that European tourism arrivals were in decline, and Flanders was experiencing year on year decreases. However, when the global economic crisis hit, tourism seemed surprisingly resilient, leading the government to question how it could better support the industry. Three triggers emerged:

- Restructure of Tourism Flanders-Brussels, with a repositioned marketing plan to better serve industry and visitor needs. VisitFlanders took the strategic decision to invest most energy and resources in product development, covering five world-class core strengths and differentiators.
- Increased focus on the region’s food tourism offer due to existing confidence in the quality and availability of Flemish cuisine. The Flanders for Foodies product manager was tasked to find local food ambassadors, and to recognise culinary craftsmanship.
- More studies highlighting the value of food tourism, including that up to 40% of visitors choose a destination because of its food culture.

Focus and promotion of the Flemish food offer was a logical direction to drive international tourism. Flanders for Foodies became incorporated into VisitFlanders, and the team grew to five specialist product managers.

The Economic Context

Tourism

In 2015, Flanders recorded 30.8 million overnight stays and 12.6 million arrivals. Figures for 2016, while available, are not typical due to the terrorist attacks experienced in Brussels in March of that year and the main airport being closed until May.

The leading overseas markets are the Netherlands, France, the United Kingdom and Germany.

The number of international visitors in hotels and similar establishments was 3.1 million (Flanders) and 2.5 million (the city of Brussels) representing 48% and 40% of the Belgian total respectively.
Food and Drink
The food industry is Belgium’s largest industrial employer (> 88,000 jobs), responsible for almost 1 in 5 manufacturing jobs. The food industry is dominated by SMEs: where 96% of companies have <100 employees. Food is Flanders’ 3rd largest industrial activity, generating more than 80% of the Belgian turnover in food. In 2015, the Flemish food industry was worth €38.4 billion and employed 61,786 people. Flanders is responsible for 82% of Belgian food and drink revenue.

Export
Belgium is responsible for 1% of worldwide beer production and exports twice as much as it sells domestically (produces 18.7 hl beer pa and exports over 13.7m hl pa.) Belgian chocolate and the confectionary industry represent 11.2% of exports; the total annual production is 661,673 tonnes, with total exports of 578,043 tonnes.

Agri-Food Investment
Flanders is the biggest R&D hub in Europe when it comes to plant biotechnology. The region is responsible for 75% of Belgian agriculture, and considered a global leader in intensive farming, featuring income per hectare that is significantly higher than the EU average.3

Tourism in Key Figures 20162

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Competitive Strategy

Flanders recognised it lagged other European counties with long-term food awareness and marketing strategies. The Flemish Government made domestic and international promotion of Flemish gastronomy one of its top priorities, aiming for Flanders to be recognised as a top culinary destination by 2020.

The 2009 – 2014 policy memorandum references the need for Government to define its initiatives precisely and in a well-thought-out fashion, selecting those which generate the least possible (additional) burdens for both the administration and the private sector actors and ensuring a concrete and factual distinction.4

The 2014 – 2019 policy memorandum advances this position and sets out a specific focus on areas of strength that provide a clear and distinct Flanders tourism offer, including the Flemish masters, cycling and food. It states a desire to invest in leveraging projects and promotion in cooperation with partners. 5

In 2014, VisitFlanders, in conjunction with the VLAM and the Agriculture and Rural Development department, carried out domestic research to assess the extent of local food experiences. Key findings were:

- Despite immense pride in Flemish regional produce, they were not a driver of holiday-taking
- Existing information and promotion of regional produce was hard to locate
- 85% of respondents would recommend Flanders as a destination where you can eat delicious local products
- Restaurants promoting local products were highly appreciated

VisitFlanders marketing plan 2014-2019 was developed together with the five provincial tourism organisations, city and local authorities and private partners – with three main culinary themes: beer, chocolate and excellent food. The emphasis is increasingly on craftsmanship and artisan producers.

Food Hub Development

While each food tourism hub can claim to cover most elements of the framework described earlier, there are some which have stronger application for each case study, and therefore receive more focus. In Flanders case these are:

Territory Assets
Natural Resources
Pork and dairy farming are the largest agricultural subsectors in the region. West Flanders has a favourable climate and fertile soil which lends itself to agri-tourism. Approximately 90% of Belgian

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frozen vegetable exports (1.2 million tons) originate from West Flanders. It is the main pig farming province (home to three times as many pigs as people).

Provenance
Flanders culinary craftsmanship dates back centuries and underpins a food heritage where the gastronomy offer is considered among the most diverse and highly rated in Europe. Beer brewing was established in the Middle Ages, and there are four brewing related products with EU protected designation of origin (PDO) status. Chocolate making started in Ghent in the 17th century, and by the 20th century, Belgian chocolatiers developed pralines, chocolate spread and liquid chocolate transportation. Though frequently described as ‘French Fries’, frites are Belgian in origin, as are Brussels sprout and endive. Chicory was ‘invented’ here and the city of Kasterlee has been described as pumpkin city since the 17th century.

Tourism Assets
Connectivity
Geographically, and with Brussels central to the EU, Flanders is easy to access for international visitors. The region is located less than 500 km from the major European capitals and served by Brussels airport, (23 million passengers in 2015), Brussels Eurostar terminal, four seaports, and an extensive railway and road network.

Attractions
The Art cities remain the core tourism asset and focus for activity. For over 250 years, from the 15th to well into the late 17th century, Flanders was at the forefront of the finest art in Western Europe and the inspiration behind the most famous art movements of the time: Primitive, Renaissance and Baroque through artists such as Rubens, Van Eyck and Magritte.

Capacity
Enablers
The drive for food to grow tourism and exports comes directly from Government, which has restructured its delivery agencies and resources to provide more effective industry partner support. The Culinary Plan for Flanders involves joining forces to grow stronger – with co-creation and co-funding. VisitFlanders is one of three premium partners, along with Hospitality Flanders (HORECA VLAANDEREN) and the Master Talent Foundation (matertalent.be) – a programme for internships and training.

The **Flanders Food Faculty** was launched as a partnership between government and private sector in 2015. It is led by tourism minister Ben Weyts and the ‘**Captains of Gastronomy**’, 19 experts in the tourism, catering and food industries, who spot opportunities, identify needs and trends. Collectively they produce an annual operational action plan, set priorities, monitor and redefine the mission and ambitions.

There are three strategy objectives:

- Smarter promotion of the cuisine – led by VisitFlanders;
- Stimulate culinary innovation and talent – led by Hospitality Flanders and the Master Talent Foundation;
- Recognise culinary craftsmanship at domestic level – led by VisitFlanders.

These objectives are underpinned by six actions:

1. Culinary Positioning – i.e. Flemish Food Manifesto
2. Flanders Food Faculty international platform – www.flandersfoodfaculty.com
3. Culinary Competitions – to score better
4. Flanders Kitchen Lab – to stimulate culinary innovation in restaurants,
5. Culinary Internships – promote Flanders as a place for culinary professionals to share knowledge and craftsmanship through professional internships
6. Local Ambassadors – domestic recognition for and of culinary craftsmanship

© Flanders Food Faculty
The Flemish Food Manifesto positions Flanders as a region of culinary craftsmanship, with a vibrant dining culture and authentic products.

- We are not the land of beers. We are the land of brewers.
- We are not the land of chocolate. We are the land of chocolatiers.
- We are not the land of food. We are the land of chefs.

Flanders for Foodies integrated with VisitFlanders in 2014 to lead the agency’s Culinary Plan. Resources increased from one product manager focused on gastronomy, to a team of five specialists (two full time and three part-time) in the fields of stakeholder management, fine dining and local produce, chocolate, food tourism, young chefs and local ambassadors, and the Flanders Food Faculty website platform. Mainly recruited from their sector, they assist with the development of meaningful tourist experiences and work alongside private sector consortia like Food. Be, (independent entrepreneurs and producers), to support the economic agenda and encourage exports. They attend networking events and engage in lobbying activity – of government departments, and the many different food federations.

VisitFlanders Culinary Plan has three Impact goals:

- Reputation Impact
  - Flanders to gain a stronger reputation as a culinary destination
  - Improved performance on the “league tables” of culinary destinations
- Economic Impact
  - More international tourists in gourmet and fine dining restaurants.
  - Increased expenditure per international tourist for eating & drinking in Flanders.
- Quality Impact
  - Increased creativity and hospitality in restaurants and bars (measured through online user review sites)

VisitFlanders operates a product development grants programme which supports the international marketing strategy. Gastronomy-based experiences (which could be either a permanent offer or an event) are eligible to apply. Successful businesses must comply with criteria designed to ensure suitability for international audiences, and there is a support/training structure in place to help them. One example is the development of the De Koninck Visitor Centre in Antwerp, which opened in September 2015 and includes a visitor experience at the brewery, and a fromagerie, butcher, chocolatier and brasserie/cycling café on the same site.

Total funding available per year for gastronomy product development is €500,000, of which €200,000 is to deliver the objectives of the Flanders Food Faculty, and the remainder is for the actions of the VisitFlanders culinary plan.

VisitFlanders is working to set up a co-funding system for better and smarter investment in international promotion; to stimulate culinary innovation and talent and to have better recognition for, and of, culinary craftsmanship at domestic level – i.e. to achieve the three objectives of the Flanders Culinary Plan via co-funding. In 2017, the primary source of funding is from the budget of Visit Flanders; the Tourism Minister is lobbying private and public-sector investors to garner additional support.

**Flanders Kitchen Lab** - Food Pilot - a laboratory operated by Flanders Food and IAFR (Institute for Agricultural and Fisheries Research) which brings together the agri-food industry and gastronomy. The aim is to boost Flemish culinary innovation, either from idea to product, or for a specific step within a process.

Many private sector organisations and entrepreneurs are active in developing Flanders food and drink – from producers, to chefs, writers and support professionals. They include:

**“Food.be”** which was created in 2012 at the instigation of **FEVIA** (Federation of Belgian food industry), to bring together artisans and entrepreneurs to promote Belgian food internationally. **FEVIA FLANDERS** - represents 28 food federations (each is a specialised sector within the food industry) and 422 food and beverage companies, including 268 SMEs (<50 employees).

**VLAM** (Vlaams Centrum voor Agro- en Visserijmarketing) promotes primary products from Flanders domestically and internationally. It provides generic marketing campaigns, expertise and support including in-depth market research. VLAM works with 11 sector groups, (fishermen, farmers, growers, and anyone who produces, processes or distributes fresh produce), trade organizations for agriculture, horticulture and distribution, and the Flemish Government. Collectively they determine the promotional activities. E.g. for a potato campaign, the various potato growers will pay a contribution to deliver a set of activities promoting the sale of products from the sector. These will include TV spots, written media articles, scholarships, adverts, press events and business days and social media marketing.

**VLAIO** – Flanders Innovation & Entrepreneurship Agency, provides funding, advice, coordinates networking and policy development for companies, organisations and research centres.

**Skills**

In May 2017, the Government announced the formation of a Young Chefs team to represent Flemish gastronomy in international culinary competitions. Each of Flanders’ 25 hotel schools will put forward two top prospects under the age of 21, who will compete to be one of eight members of the Young Chefs team.

Flanders Food Faculty partner Horeca Vlaanderen (Hospitality Flanders) and Master Talent Foundation organises professional chef tours to promote and learn about kitchen trends, seasonal produce and new concepts.

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9 [https://www.food.be/](https://www.food.be/)
Ambassadors

Michelin three-star chef Gert De Mangeleer launched the Flanders Kitchen Rebels competition to celebrate excellence and innovation. The designation is open to 25 outstanding young chefs, under the age of 35, and with a great passion for Flemish gastronomy. There are strict criteria and a stringent assessment process, presided over by a jury of industry professionals and food writers. In the 2016 competition, 125 chefs applied to be included.

VisitFlanders invites Flanders Kitchen Rebel chefs to attend promotional events worldwide. It has invested in a toolkit which promotes Flanders as a food destination, as well as the chef’s own restaurant. The toolkit consists of a general promotional film, banner, infographic with facts and figures and a PowerPoint presentation. Additionally, the chefs each receive their own personal video, banner, flyers and press folder. Profiles of the current Flanders Kitchen Rebels can be seen on VisitFlanders website, and promotional brochure.

Flanders Food - offers culinary competitions to raise the profile of Flemish cuisine and products, and culinary scholarships for overseas chefs in Flanders, or Flemish Chefs to work overseas. Both activities lead to more food ambassadors.

Flanders Tourism Minister repeatedly asserts that “Putting the restaurant culture on the international stage is a way to attract more tourists to Flanders”. In May 2017, he visited the Basque country to sign an agreement between the two regions to promote gastronomic tourism, and to persuade the World Tourism Organisation (UNWTO) to hold its World Forum for Gastronomic Tourism in Flanders in 2020.

The Food Experience

Lead Products

VisitFlanders leads with Beer and Chocolate, while promoting the overall gastronomic appeal and Flemish food products and specialities such as grey shrimp, to drive tourist visits. There are more than 2,000 chocolate shops, responsible for retail sales of around €700 million.

Flanders currently has 199 breweries and over 10,000 bars. Centuries old breweries and recipes for traditional ale lagers, lambic, trappist and abbey beers continue to evolve and innovate e.g. Flanders brewers are now producing IPAs and more ‘hoppy’ beers. There are over 1,500 original Belgian beers; many are served in their own distinctive glassware, which is shaped to accentuate both the flavour and visual presentation.

A European delicacy for hundreds of years, Belgian chocolate sets the gourmet standard with the best pralines and truffles still made by hand. The world’s largest chocolate factory (Barry Callebaut) is located in Wieze. In 2014, the company invested EUR 4.5 million in a new state of the art chocolate academy, which offers chocolate professionals a place to hone their skills through practical courses and demo sessions. Total turnover of the Belgian chocolate industry amounts to €4,179 billion; there are 320 chocolate and pastry plants employing 8.5% of the workforce.
Visibility
VisitFlanders identifies food and drink as a world-class differentiator from other tourism destinations. The tourism website highlights Beer, Chocolate and Flemish Food, with information provided in easy to navigate sections. Users are directed to landing pages with subpages giving greater detail.

The agency has undertaken partnerships with breweries and with the Kitchen Rebels at events around the world supporting activities for the travel trade, press/PR, MICE or consumer-oriented. At major tourism trade fairs (ITB, IMEX, WTM and IBTM), gastronomy can be a featured as a promotional activity to underline the attractiveness of the destination (e.g. chocolatier on stand, bar serving Belgian beer (often sponsored by a brewery), or by a gastronomy-related tourism business being a stand exhibitor.

Food related experiences promoted to independent leisure visitors, leisure groups and MICE groups include:

- Encouraging young Belgians to eat a set menu (with drinks) at a participating restaurant of the ‘Flanders Kitchen Rebels/Jong Keukengeweld’ programme for a special price;
- Chocolate making workshops hosted by artisan chocolatiers;
- Beer pairing workshops;
- Gastronomy events – e.g.
- Brewery visits in beer experience centres or breweries (e.g. http://www.dekoninck.be/en/visit-us/the-experience or http://www.bierkasteel.be/en)
- “Flavours of Flanders” promo events
- Gastro tours.

Flanders Today offers a free e-book – the ultimate guide to beer drinking. It confidently states ‘Everyone knows you get the best beer in the world right here in Flanders, but it takes an expert to know which glass to serve it in, how to pair it with cheese and which brewer makes which brew’.

Food Events
There is a year-round programme of food and drink events. Many are partnerships between Visit Flanders, the city Destination Organisation and ‘food professionals’ (e.g. chefs):

- Kookeet (Bruges) three-day food festival (September) with 32 top chefs which attracts 100,000 people http://www.kookeet.be/
- Leuven’s Innovation Beer Festival (June) organised by brewery Hof Ten Dormaal at the birthplace of Stella Artois and supported and marketed by Tourism Leuven. http://www.leuveninnovationbeerfestival.com/
- Smakmeesters (Antwerp) – Masters of Taste month long event in October, presented by the city and 65 restaurants and producers. Participation comes with a request that ‘If you participate, you are committed to making this project as successful as possible with the city and the other Taste Masters, by making agreed appointments and using your own communication channels for promotion’. http://www.visitantwerpen.be/en/see-do/events-exhibitions/smaakmeesters-2017

Beer festivals are frequent, at least one for every month of the year. One of the largest is the Belgian Beer Weekend, held in Brussels’ Grand Place and attended by 75,000 people sampling

Antwerp hosts Pastry week (Feb) and Chocolate Week (March) as well as a programme of gastronomy events from May – October, including the ‘Antwerp à la Carte’ exhibition about the city’s gastronomic history and the Modeste Beer Festival showcasing small scale craft brewers.

At Salon du Chocolat at Tour & Taxis (Brussels), 80 participants get together with pastry chefs and cocoa experts to demonstrate recipes, hold workshops, conferences, chocolate fashion shows, and other chocolate-related activities.

**Bookable Experiences**

VisitFlanders international offices set up joint promotions with local partners – e.g. for the UK this could be with Eurostar or P&O Ferries; and with Deutsche Bahn in Germany. In the case of Brussels Airlines, campaign activities might run in multiple markets, but in the main, most carriers only operate in one of the target markets. Budget for the activities is assigned to a market. There is a much higher focus on B2B2C activity for the UK, Netherlands, Germany and France, whereas activity in the US or Japan is mainly press/travel trade focused. Typically, this is funded with tour operators on a 50/50 basis. TripAdvisor lists 107 local food and drink experiences – two of which are bookable online. There are incoming tour operators promoting and arranging organised food tour packages, including Focus Flanders. All About Belgium, Savour Lille. Companies like Superbreak offer bookable short breaks via Eurostar, which incorporate an element of food tourism as part of a wider city focus.

VisitFlanders promotes beer culture to the travel trade with Belgian Beer Experiences in Flanders and Brussels'. It lists the breweries offering guided tours for groups, beer museums, bars and restaurants, beer events and interesting facts and figures. There are cycling and walking routes to pubs and breweries in East-Flanders [http://www.planbier.be/en](http://www.planbier.be/en).

**SWOT**

Flanders is an example of a destination which has taken core components of its heritage and identity, its natural resources and a culture of culinary innovation, and placed it at the heart of Government policy for tourism promotion, investment and trade.

An international reputation for beer and chocolate are at the forefront of exports and promotion, used imaginatively to attract prospective visitors and introduce them to wider Flemish cuisine and passion for gastronomy – with a year-round events calendar and new twists on ‘everyone’s favorite food and drink’.

The focus as a food tourism hub has developed relatively recently, with accelerated organizational and agency support over the past five years intended to meet clearly defined Government ambitions for 2020.

**Strengths and opportunities**

- Strong Government commitment and resourcing;
- Clear, multi-agency supported strategy

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11 [https://www.aab-allaboutbelgium.be/](https://www.aab-allaboutbelgium.be/)
• VisitFlanders Product Managers – employed with a specific focus on product development initiatives.
• Trade engagement - private sector and entrepreneur food and drink organisations, producers and processors; leading skills development and celebrating innovation;
• Flanders Kitchen Rebels – ambassadors willing to showcase quality and innovation in Flanders culinary scene;

Challenges / Weaknesses

• International awareness is mainly limited to beer and chocolate
• Dominance of SMEs in the food and drink industry
• Food tourism is becoming increasingly popular with destinations keen to tap into this global trend

Results

Exports represent the main growth driver for the Belgian food industry, where international sales have increased by 62.5% since 2005. In 2015, Belgium exported €23.9 billion of food and drink, dominated by beer and chocolate.

The Flemish food and drink sector created the brand "Food.be - Small country, Great food" in 2012. It is the focus of Flemish food company exports, supported by Flanders Investment & Trade. This partnership has resulted in investments in the Flemish food industry of up to almost 1 billion euros.

Learnings
This case illustrates how determination to build a position and reputation for food tourism can be achieved in a relatively short space of time. It acknowledges that to compete with long-established food reputations elsewhere requires clarity of purpose, co-operation and appropriate resources.

Given the increasing number of destinations using food as a differentiator, UK destinations seeking to follow the Flanders example will require a combination of

- **A clear objective backed by strong and committed leadership** - the Flemish government has a clearly expressed aim to see Flanders recognised as a leading food destination by 2020. It will be delivered collectively through the Flanders Food Faculty, including tourism agency Visit Flanders, and linked agencies including Flanders Investment and Trade and VLAIO, backed by the Flanders Food Manifesto and appropriate resourcing in terms of structure and finance;
- **Resources** – in this case dedicated product managers employed with a remit to develop products that meet a qualitative standard for tourism promotion;
- **Active participation of Ambassadors** in tourism promotional initiatives and their willingness and availability to support travel trade and media events worldwide.
- **Lead products** which can be leveraged to introduce the wider concept of local cuisine. On and offline promotion moves away from general statements about food and instead provides specifics, detail of places, events, itineraries;
- **Cooperation** between the Food and Drink industry (chefs, growers and producers, networks, media) and the Destination Organisation for mutual benefit and to celebrate skills and innovation.
Melbourne

Introduction
This case study examines Melbourne’s development as a thriving urban visitor destination which has positioned food and drink as a key part of its overall experience mix.

(www.visitmelbourne.com/Regions/Melbourne/Food-and-wine)

Relevance to the United Kingdom
At a global level, Melbourne is not a city that’s intimately associated with a certain type of food and drink products or cuisine, however it does provide an exemplar of a city which has successfully developed a thriving and on-trend food and drink scene and which acts as a showcase for regional produce. The city ranks consistently in the top 3 in global surveys of ‘most liveable cities.

Melbourne’s approach to food and drink experience delivery is of relevance to many of the UK’s urban hubs including; London, Edinburgh, Cardiff, Bristol, Manchester, Liverpool and Glasgow. In addition, Melbourne’s experiences are relevant to fashionable hubs such as Newcastle, Hull, Leeds, and also ‘precincts’ of major cities, including London’s Boroughs.
Summary
Key features of Melbourne as a food and drink hub exemplar include:

For domestic and international visitors Melbourne is positioned as Australia’s leading sophisticated, stylish, cultural and creative city. The private sector has been critical in leveraging these attributes to provide distinct products and services in; food and wine, arts and culture, and shopping. Food and drink experiences are largely private sector or community driven – whether based around fine dining or more casual food and drink experiences. A large and food-savvy population is instrumental in supporting a broad range of formal and informal food and drink experiences.

Melbourne is a shop window for Victorian food and drink products, with local produce featuring extensively on menus (wine, fruit, seafood, chocolate, meat etc). As well as its growing reputation for fine dining, the City has a good depth of experiences – based on a range of authentically Melbourne experiences i.e. café/ coffee culture, a strong craft beer sector, food trucks, and a thriving roof top bar scene. The city is on-trend in being a leader in a number of these areas.

The post war wave of Greek and Italian migration was instrumental in shaping precincts and types of cuisine now closely associated with Melbourne, as well as being the origin of Melbourne’s obsessive coffee culture.

Melbourne has established a number of its City precincts as food and drink hubs, each with a distinctive feel. Innovative urban planning and licensing approaches have created environments and precincts which are home to a wide range of food and drink experiences.

Food and drink plays a prominent role in the City’s liveability proposition – this incorporates the City’s events and food and drink experiences, and access to those in neighbouring Victorian regions. Visit Victoria and Agriculture Victoria are part of a family of Victorian Government brands which market the work, live, study, invest propositions for the State.

The city has been pursuing a proactive strategy to position itself as a gastronomic hub. As well as a wide range of high end restaurants, the gastronomic feel also filters through types of cuisine synonymous with the city. This strategy was continued in 2017, with the city hosting the World’s 50 best restaurant awards.

Being a large city destination, Melbourne’s development as a food and drink hub does not incorporate all of the components of the food hub framework – it is driven by dining and entertainment experiences, showcasing and capitalising on the wide variety of food and drink grown and produced throughout Victoria. Its attributes are particularly strong in terms of; provenance, enablers, gastronomy, lead products, Bookable and visibility.
General Background

As the city has grown through waves of immigration, it has become well known within Australia for certain types of cuisine, especially Greek and Italian.

As the State’s capital, the City has always had a major role in showcasing the State’s produce - neighbouring Victorian regions are home to a wide range of produce – most notably seafood, fruit and vegetables, and dairy. Chocolate production is also notable. This produce features strongly on menus.

Large numbers of artisan producers are based in the nearby Yarra Valley, Mornington Peninsula and other surrounding regions, delivering high quality produce. These are positioned as touring propositions from Melbourne as well as visitor destinations in their own right.

Melbourne has taken full advantage of food and drink being prioritised at a national level by Tourism Australia in the Restaurant Australia campaign, enabling it to build awareness in international as well as domestic visitor markets. This partnership has been important in its recent success as shown by the City’s successful hosting of the World’s 50 Best Restaurants Awards in April 2017.

The State of Victoria as a whole is a major Australian agricultural hub, with its wine industry being particularly high profile i.e.
- 21 distinct wine regions
- 12,000 jobs
• 1.5 million winery visits per year.

**Trigger Point for Growing the Prominence of Food and Drink Experiences**

Supported by positive consumer market forces, a number of factors have coalesced to raise the prominence of Melbourne as a food and drink hub:

- The origins of Melbourne’s foodie culture are rooted in large part in post-war waves of migration, and the city embracing these cultures – it is unlikely that food and drink experiences or the engrained ‘foodie’ culture would be as prominent without these influences.
- Growth in foodie ambassadors – they have been instrumental in the private sector driven development of food and drink propositions. Ambassadors are advocates for high end gastronomy as well as niche sectors such as food trucks, coffee and craft beer. Signature restaurants such as Heston Blumenthal siting in Melbourne and Attica (1 of 2 Victorian restaurants rated in the world’s top 50) have also made a difference in terms of perception and profile.

**Economic Context**

**Tourism**

In 2013-14, the tourism industry contributed an estimated $8.9 billion (£5.2B) to Melbourne’s economy (3.3% of gross regional product) and employed approximately 89,900 people (4.4% of employment). It is recognised as a State-wide economic priority.

**Food and Drink Exports**

In 2015-2016, the value of Victoria’s food and drink exports alone was $8.6 billion. Alongside dairy, beef and a range of other crops, wine is a key export product for the State. A range of food production and export strategies are in place at State level, including:

- Victoria’s Back to Work Strategy which includes a focus on growing in exports in the fibre and food sectors.
- A free trade arrangement recently agreed between Australia and China at national level has opened up tariff free/reduced access to Chinese markets for some producers and also provides opportunities for Australia-based tour operators to sell in China.
- A partnership between Victoria and China’s Jiangsu province.

**Competitive Strategy**

From a tourism perspective, Melbourne’s competitive strategy is based on positioning the City as a gastronomic hub and maximising food and drink’s appeal as part of Melbourne’s overall liveability proposition. The City is a showcase for a wide range of Victoria’s food and drink produce.

Consistent with the long term national tourism strategy, Victoria’s 2020 Tourism Strategy’s aim is to grow overnight tourism expenditure to $24.7 billion by 2020. In addition to having a focus on food and wine, art and culture, nature based tourism, and spa and wellbeing, there is an increased emphasis on marketing events. The City of Melbourne Tourism Action Plan 2016-2019 recognises the importance of tourism-related economic activity in the Melbourne municipality, and notes that of the estimated $20 billion tourism contributes to Victoria’s economy, $3.7 billion is generated
within the Melbourne municipality. As a strategic ambition an action seeks to “Boost Melbourne's strength as Australia's centre for music theatre, live music, arts and culture, food and wine, major events, shopping, international sporting and business events.”

**Agriculture**

From an export perspective, the city acts as a showcase for regional produce as well as being an important air and sea port for freight coming into and leaving the State. There is some anecdotal evidence of Melbourne’s home-grown coffee culture being exported to some US cities. While analysis suggests that export and tourism strategies are largely activated as separated activities at present, clear synergies are apparent.

Victoria’s temperate climate, high quality soils and clean water support world-class agriculture industries. In 2012-13, Victoria’s agricultural industries used a total land area of 10.6 million hectares. About 6.1 million hectares is mainly for grazing, and 4.5 million hectares is mainly used for cropping. The gross value of agricultural commodities produced was $11.6b (£6.7b).

**Food Hub Development**

**Territory Assets**

**Provenance**

In addition to its grounding in locally produced food and drink (wine, seafood etc) Melbourne’s modern food and drink provenance has its roots in the waves of immigration which have shaped the city - its food and drink scene has embraced these influences. Post-war immigration from Greece and Italy in particular, has played a major role in shaping local food culture. Melbourne’s coffee obsession stems directly from Italian immigrants and the city’s fame within Australia for Greek and Italian food is built on these immigrant populations. In more recent decades, Asian migrants have added a new dimension. Melbourne’s eclectic food offerings - its own style of fusion cuisine can lay claim to a legitimate provenance which blends local produce and migrant cultures.

**Food Community**

Greater Melbourne has a population in excess of 4 million. This population includes a large body of foodie enthusiasts – in the city and the surrounding regions. Consensus indicates that Victoria’s large wine industry and the widespread availability of local wines have played a role in growing public consciousness of high quality food and produce. This population supports a diverse range of food and drink experiences i.e. Melburnians’ coffee obsession which supports a thriving café scene, a growing reputation for fine dining, on-trend food truck and craft beer businesses etc.

**Natural Resources**

As a large city destination, Melbourne has limited ‘natural resources’ as defined in the food hub framework. It does however base its food and drink experiences in large part on the produce and underpinning natural resources of Victoria. In this sense, within three hours of Melbourne are coastlines and ocean with abundant fish stocks, fertile plains and grazing land and high quality soils which support some of Australia’s most viticulture and horticulture growing areas.

**Tourism Assets**

**Connectivity**

Successful precinct development and high quality public realm planning have been instrumental in Melbourne’s development as a food and drink hub.
Melbourne has established a number of its city precincts as food and drink hubs, each with a distinctive feel - the CBD laneways for city dining and entertainment, St Kilda – Melbourne’s beachside suburb for dining and entertainment, CBD rooftop bars and precincts well known for certain types of cuisine i.e. the CBD’s Chinatown, Richmond for Vietnamese, Carlton’s ‘Little Italy’, Fitzroy for Spanish and Brunswick for Lebanese.

**Attractions**

Laneways are an integral part of Melbourne’s city-centre identity, providing some of the most important and unique public spaces within the City. The central city area of Melbourne is home to more than 230 laneways and is well-known for a wide-ranging set of experiences including; street art, one-off boutiques, galleries, tiny cafés and hidden bars.

Melbourne’s shopping arcades and associated laneways reached peak popularity in the Victorian era and the interwar years. However, since the 1990s onwards that they have become reinvigorated as entertainment hubs, and home to a large number of food and drink businesses.

Innovative and forward thinking policy has helped create the laneways as thriving hubs for food and drink businesses. Key policy approaches and initiatives in their development have included:

- **An important catalyst for laneway developments were the amendments made to the Liquor Control Act.** As part of a raft of measures, the cost of liquor licences was reduced and conditions relaxed to encourage a culture of small bars rather than “beer barns”. Venues serving alcohol were no longer required to offer food. This minimized overheads including kitchen fit-outs and operational costs which had previously priced smaller independent businesses out of the market.

- **Street Art Policy - Public art projects were promoted to beautify the laneways.** Today many of the laneways are world-renowned for their street art, functioning as galleries as well as stages for performances. From a policy perspective, graffiti is not encouraged; however, the City provides permits for what is constituted as “legal” street art, where building owners have granted permission to the artist.

- **Laneway Development - The Melbourne Planning Scheme provides guidance for development on laneways to support their diverse servicing, social, cultural, and economic functions.** New development on laneways is encouraged to support the human scale nature and pedestrian connections through articulated frontages, overlooking windows and balconies, and small tenancies integrated at ground level.

- **Municipal Strategic Statement - the policy calls for the preservation or enhancement of connectivity, 24-hour public access, views, active street frontages, service functions, and pedestrian amenities.**
Capacity

Enablers - Leadership and Partnership
The State Government and City Council have provided strong leadership and significant levels of resourcing to ensure tourism (and food and drink as part of this) are recognised as priorities. Issues to highlight include:

- Melbourne and the surrounding Victorian regions have established a mutually beneficial relationship – the City acting as a showcase for produce and as a gateway for regional touring trips.
- Leveraging the opportunities provided by national food and drink marketing and product development initiatives such as Restaurant Australia has been hugely beneficial to Melbourne.
- The State Government (via VisitVictoria) working closely with the City Council provides strong leadership.

Enablers – Support for Development of Trade Links
Support for businesses in developing travel trade links is available via a range of city, state and national agencies, including:

- Destination Melbourne provides a range of support services which aid development of trade links, including the Melbourne Tourism Industry Exchange which facilities networking between product providers and distributors.
  - (https://destination.melbourne/)
- Australian Tourism Data Warehouse (ADTW) is Australia's national platform for digital tourism information. This content is electronically accessible by tourism business owners, wholesalers, retailers and distributors for use in their websites and booking systems.
- TourismTribe.com https://www.tourismtribe.com/ manages the Tourism e-kit resource – an online training program, covering all aspects of marketing and trade development,
including support which is made available via an online learning community with hands-on support from accredited coaches.

- Tourism Australia (TA) offer a number of programs and activities designed specifically to support development of trade links, including:
  - Corroboree West - an annual Australia-based trade event for qualified Aussie Specialist agents who sell Australia as a preferred long-haul destination
  - Australian Tourism Exchange (ATE) – an annual forum which brings together tourism businesses and international tourism wholesalers and retailers
  - TA’s Restaurant Australia program has achieved significant successes in terms of raising the profile of many of Melbourne’s culinary experiences. The application process in its own right has provided TA with an extensive database of food and drink experiences for promotion to both consumers and trade networks. The most recent tranche of the Restaurant Australia program in Melbourne (World Restaurant Awards) was supported by a large scale program of networking and trade/press familiarisation activities.

Enablers – Tourism Export Support
Exporting advice and support is available to tourism and food and drink businesses, including:

- Destination Melbourne provides support for businesses seeking to grow international audiences, including the ‘Check in China’ program – comprising study tour of Melbourne’s number one international market.
  - https://destination.melbourne/
- Australian Tourism Export Council (ATEC) – ATEC offers a wide range of support services for members businesses
  - https://www.atec.net.au/ATEC/PDFs/TeXT.aspx
- Austrade https://www.austrade.gov.au/Australian/Tourism/Tourism-and-business/tools-for-business provides a range of programs including the export development marketing grant
  - https://www.enterprise1.com.au/emdg?gclid=CjwKCAjwqflBLBRCK6vH_rJaq7yD0SJACG18friXwZ68cAfzs7EoTVi_GrDrXHjks748dUjAkJMQIZBoUXw_wcB.

Production
Inner city Melbourne is home to a number of thriving on-trend food and drink movements, including craft beer, coffee etc. Alongside these consumer-focused offerings, there is also growing evidence of increasing production, driven primarily by SMEs and micro businesses;

- Data shows processing and production businesses in the City of Melbourne jumped 92% between 2005 and 2015.
- The number of beverage manufacturers — including beer, wine and soft drink makers — has more than tripled in the same ten year period.
- Among the fastest-rising processors are companies that make baked goods — more than doubling between 2005 and 2015.
Ambassadors
The City benefits from a growing number of chefs and media stakeholders who proactively champion local food and drink. City stakeholders are proud of Melbourne’s liveability reputation and play an important role in talking up the destination. Coverage of food and drink experiences in local press and media is positive.

The Food Experience
Gastronomy
Melbourne thrives on its mix of cultures in its myriad restaurants, cafes, bistro and bars and eclectic dining scene. The city has a clear foodie culture, easily discernible in the extensive coverage provided in local press and media. The city’s main newspaper, the Melbourne Age produces the annual ‘Age Good Food Guide’, awarding ‘hats’ to its best restaurants. Melbourne now has an extensive range of ‘starred’ or ‘hatted’ high-end dining experiences.

Its recent hosting of the World’s 50 best restaurant awards underscores Melbourne’s intentions to be seen in this context. Timed to coincide with the Melbourne Food and Wine Festival, the World’s 50 Best Restaurants awards ceremony took place in April 2017 as part of a week-long programme of trade, press and consumer-focused activities. Initiatives included a chef’s feast gathering of the world’s best chefs; the main awards ceremony; and touring programs around Melbourne and regional Victoria. The 800 invited guests, made up of chefs, industry and top international food and wine media and influencers, provided further opportunity to extend Victoria’s and Melbourne’s reputation as a world-class gastronomic destination. Two of Melbourne’s restaurants have been rated as being in the world’s top 50.

Securing the restaurant awards was part of a conscious destination strategy to position the city as a gastronomic destination.

Lead Products - Coffee Culture
A unique side to Melbourne’s identity is its mature coffee culture which dates back to the 1840s however popularity was especially driven by post-war migrants. In 2008, Starbucks closed 70% of its stores in Melbourne, demonstrating demand for home grown authentic coffee experiences. In an urban context, Melbourne’s coffee culture can be regarded as an artisan-led movement. Coffee has become an obsession for Melburnians and certainly one of the defining characteristics of the City’s food and drink experiences. Notable characteristics include;

- World champions - Melbourne baristas regularly feature at the top of their professions.
- Neighbourhood vibe – distinctive café culture can be found throughout Melbourne’s suburbs, not just the city centre or entertainment precincts.
- Exporting a culture - the New York Times has recently reported an influx Australian-style cafes, with Melbourne’s cafes as a template.

Lead Products - Visitor Food and Drink Experiences
The bulk of Melbourne’s food and drink experiences are dining and entertainment led. In addition to dining and entertainment-led precincts, distinct food and drink experiences include;

- The City’s Queen Victoria Market (large scale food market) in an Australian institution.
- An extensive range of self-guided trails and tours.
Events are also an important component of the experience mix, including:

- Signature events - Melbourne Food and Wine Festival, Worlds’ 50 best restaurants awards
- An extensive range of cuisine and precinct led events.
- A wide range of fresh produce markets.
- Promotion of regional events as touring experiences from Melbourne.

Visibility

Food and drink is a leading component in how Melbourne is marketed to target domestic and international visitor markets. Visit Victoria has worked with Tourism Australia on campaigns and activations across the globe, including media and consumer events in the UK and Europe, China, Hong Kong and the USA. Profile and reach of Melbourne as a food and drink destination has been significantly extended through partnering in this high profile initiative.

The city’s liveability proposition is reflected in its tourism positioning and experiences - lead propositions include; sport, culture, and retail. Over the past decade, food and drink (within a broader entertainment proposition) has become an increasingly important and complementary addition. There is an expectation that a visit to Melbourne will involve eating well - whether at a starred restaurant, ethnic cuisine or at cool café or rooftop bar. A number of these food and drink experiences have a distinct hipsterish feel to them – a theme that’s also cultivated within overall destination positioning as a ‘cool’ city.

Positioning also includes a ‘hand in glove’ relationship with surrounding Victorian regions – Melbourne is marketed closely alongside regions which are within day trip distance, many of which have excellent food and drink propositions, including the Yarra Valley and Mornington Peninsula vineyards.

Visit Victoria and Agriculture Victoria are part of a family of Victorian Government brands which market the work, live, study, invest propositions for the State. Brand guidelines govern use of the brand family. Melbourne is very much the lead tourism proposition.
SWOT Analysis

Melbourne provides an example of a city that’s successfully embraced an eclectic foodie culture as part of its overall liveability proposition for residents and visitors. Innovative public realm planning has provided thriving precincts which enable food & drink businesses to flourish.

Strengths & Opportunities

- **Strong on visibility and positioning - food and drink** is a core element of Melbourne’s enviable ‘world’s best liveability and lifestyle’ positioning.
- **Strong set of gastronomic experiences** – successful hosting of the World’s 50 best restaurants has provided a platform for further development.
- **Innovative precinct planning** – the city’s approach to laneways and precinct development has helped create thriving dining and entertainment precincts.
- **On-trend food and drink experiences** - a strong impetus is provided by private sector and individual entrepreneurs in driving investment and deliver.
- **Growth markets** - Asia generally, and China specifically are target markets for the agriculture and tourism sectors.
- **Strong food community** - a large local population with strong levels of interest in food and drink experiences sustains urban food and drink experiences.
- **Strong set of ambassadors** - passionate private and public sector advocates and champions for Melbourne’s food and drink products and experiences.

Weaknesses & Threats

- **Remaining on-trend** is a challenge - the challenge of pre-empting the next craft beer or food truck trend.
- **Relatively limited bookable product**, although the ability to mix city food and drink options with regional touring helps in this regard.

Results

Tourism

Tourism is a significant economic driver for Victoria as a whole. In 2014/15:

- The sector generated $21.7 billion to the State economy and employed approximately 210,000 people.
- Contributed $10.3 billion to the Victorian economy.
- Generated approximately 137,000 jobs (4.7%) of total employment in the State).

Food and Drink Exports

Melbourne acts as a showcase for much of Victoria’s crops and produce in its restaurants and markets. Key statistics included:

- In 2015-2016 the value of the food exports in Victoria was $8.6 billion
- China was the top food and fibre export, with an estimated value of $3.1 billion
- Red meat exports were valued at $2.7 billion, dairy at $1.9 billion, animal fibre at $1.6 billion and grains at $967 million.
Learnings

Basic Assets

- Like their international counterparts, most large UK cities tend to have similar core food and drink components based around dining and entertainment. Not having a unique cuisine intimately associated with a city need not be a hindrance in establishing themselves as food and drink hubs. However, distinct elements are important – in Melbourne’s case, elements such as on-trend food and drink movements and distinctive aspects such as authentic coffee culture have helped differentiate it. UK cities need to consider what their food and drink differentiators are.

- Having a clear food and drink provenance is important for UK destinations thinking of positioning themselves as food and drink hubs. In Melbourne’s case, its successful embracing of the cuisine and cultures of successive waves of immigration has been crucial in establishing a bone fide food and drink heritage. Arguably, the City’s passion for food and overall foodie culture may not have taken root without the drive provided by these passionate migrant populations. Melbourne has successfully embraced these cultures with its local produce, and fused them as part of its overall food and drink positioning. Most UK cities have similar types of opportunities available to them.

- Outside a very small number of tourism hubs, economic sustainability for urban food and drink experiences is supported by local populations – this usually means a resident population of a certain scale and with a strong interest in food and drink. Their support drives the economic viability of enterprises enabling them to be represented as food and drink experiences to visitor markets. This ‘adequate’ level of local demand/interest is an important consideration for UK destinations seeking to expand their range and depth of food experiences.

- Key enablers for delivery of urban food and drink experiences are welcoming public realm/precincts and a supportive regulatory framework. Melbourne’s innovative application of planning and licensing frameworks has enabled its laneways to become a great home for small food and drink operators. Melbourne’s precincts also help it stand out from the crowd - driven in part by proactive public realm planning but also by a number of these areas gaining their character from being well-established migrant population hubs.

Capacity

- For UK cities to legitimately position themselves as hubs, a depth and volume of food and drink experiences is necessary. Melbourne is an example of a city that has incrementally developed this depth of experiences and dining options – driven by engaged and passionate business and food communities. Delivering a range and quality of food and drink experiences beyond the norm expected from a large city requires a fully engaged business and community base. There is also some evidence that an active city-based group of food and drink artisans (craft brewers/distillers, bakers, coffee roasters etc) also can drive a renaissance in small-scale food and drink production in inner city areas.

- Effective partnerships between cities and their surrounding regions is an important consideration for UK city destinations. Melbourne and the surrounding Victorian regions
have established a mutually beneficial relationship – the City acting as a showcase for produce and as a gateway for regional touring trips.

- Energetic and passionate food Industry leaders can play a leading role in creating a positive attitude towards food and drink in UK cities. The energy shown by Melbourne’s food and drink fraternity is palpable – harnessing the media, trade and consumer reach of these ambassadors has played an important role in building Melbourne’s food and drink reputation.

The Food Experience

- Urban food and drink experiences need not be based solely on fine dining or a narrow view of what constitutes gastronomy. In Melbourne, artisan movements in areas such as baking, craft brewing, cafes, food trucks etc have been a valid part of the city’s development as a food and drink hub.

- Signature events or businesses can play a big role in reputation building for UK destinations. In Melbourne’s case, Attica, one of the world’s best 50 restaurants is a much profiled business, and attracting Heston Blumenthal to site one of his ventures in the city has performed a similar role. Developing or attracting a signature experience can play a valuable role in building a reputation as a food and drink hub.
Tasmania

Introduction
Tasmania is a leading example of a destination which has established food and drink as a prominent element in its tourism proposition. In doing so it has worked closely with its agriculture, aquaculture and food & beverage sectors. The case study focuses on Tasmania’s experience from a rural destination perspective.


Relevance to the United Kingdom
Tasmania is a relatively large area in UK terms (approximately the same size as the Republic of Ireland) but with a population of only 500,000. From a tourism perspective; it is especially well known for its pristine environment and extensive wilderness regions.

It has strong similarities in terms of; tourism product, its location some distance from major population centres, and landscape/topography with; the Scottish Lowlands, North Wales and a number of English regions including Northumbria and Cumbria.

Driven in large part by its island location, Tasmania also has a very powerful sense of identity, distinct from other parts of Australia. This identity is reflected in its wide range of authentic food and drink produce. In this sense it’s branding and positioning also provides interesting learnings for the UK’s nations and regions.
Summary

Key features of Tasmania as a food and drink hub exemplar include:

- **Strong Natural Resources** - Tasmania’s rich soil and pristine environment provide the natural resources which enable its growers to produce a wide range of local produce for local and export consumption. Strong levels of bio-security in food production and GM-free status reflect these important natural resource attributes.

- **Quality** - From both exporting and tourism perspectives, Tasmania has become synonymous with high quality produce. Its ‘pristine environment’ attribute is the basis for a quality-led sales proposition for the State as a whole.

- **Identity** - Being an island State, Tasmania has a strong sense of identity, distinct from other parts of Australia. This distinctiveness is reflected in its wide range of authentic locally grown produce.

- **Government Commitment and Leadership** - the State Government is committed to both the food and drink and tourism sectors as key pillars of the economy. The State Premier is also the Minister for Tourism, Hospitality and Events. The strong growth being experienced in both the food export and tourism sectors in recent years has in part been driven by the strong leadership provided. Synergies and tangible links between the food & drink and tourism sectors are clearly understood.

- **Leveraging National Partnership Opportunities** - Working as a leading partner in the national Restaurant Australia programme has enabled Tasmania to generate a profile which otherwise would not have been feasible.

- **Timing and Market Opportunity** - Tasmania has tapped into growing and sustained market interest in food and drink at an opportune time. International research conducted by Tourism Australia in key tourism markets identified food and beverage as a key factor in holiday decision making, and as the most important emotive trigger for trip decisions.

- **Branding** - Common Branding is utilised for food and drink exports and tourism under the Brand Tasmania umbrella – attributes such as pristine environment, authenticity and quality underpin both sectors.

- **Food and Drink Exports** - Tasmania’s food exports have both been growing strongly – strong links with Chinese growth markets are being established, in particular, fresh/live seafood and high quality dairy produce are experiencing strong growth.
Tasmania’s food and drink characteristics cover many of the components of the food hub framework, however its attributes are particularly strong in terms of: **Natural resources**, **Identity**, **Export**, **Local produce**, and **Lead products**. Its strengths are based in the outstanding depth of natural resources. Presentation of its food and drink products as visitor experiences is straightforward, based around high quality, authentic local produce.
General Background

Tourism
Tasmania is fast developing a reputation for providing some of the best food, wine and beverage tourism experiences in the world. According to the Tasmanian Visitor Survey (TVS) nearly 350,000 visitors of all interstate and international visitors to Tasmania in 2016 went to a local food producer during their visit.

Feedback from Tourism Tasmania’s Tourism Information Monitor (TIM) also indicated that over 50% of travellers considering a holiday in Tasmania, said they would like to visit specialist food and wine producers on holiday.

The TIM survey results also revealed that when talking about Tasmania’s food and beverage offering, the State’s seafood, cheese and wine were top of mind.

Tourism in Tasmania directly and indirectly contributes $2.55 billion (£1.5B) or 9.9% to Gross State Product (GSP). The direct and indirect contribution of tourism in Tasmania to GSP is the highest in Australia.

- Tourism directly and indirectly supports approximately 37,000 jobs in Tasmania - approximately 15% of employment.
- A total of 1.24 million people visited Tasmania on scheduled air and sea services during 2016 – strong visitor growth has taken place over the past 5 year period.

Agriculture and Fishing Sectors
Agriculture and fishing are important components of Tasmania’s economy. More than a quarter of the total land area is committed to food production, while 3,200 km of coastline provides prime fishing territory.

The Tasmanian Government has placed renewed emphasis on agriculture, planning to grow the value of agriculture ten-fold to $10 billion per annum by 2050 (£600m). This growth is based on a number of core attributes:

- A pristine environment.
- Low genetic risk (moratorium on growing genetically modified crops) with strong levels of bio security.
- An unparalleled reputation for high quality produce. ‘Grown in Tasmania' have become bywords for quality.
Trigger Point for Growing the Prominence of Food and Drink Experiences

Agriculture is a long-established mainstay of the Tasmanian economy, with tourism having been positioned as a growing sector and source of diversification. However tourism has grown in importance as an economic pillar over the previous decade, with food and drink rising to be a leading attractor.

A number of factors have coincided to trigger this growth;

- The economic priorities and leadership provided by the State Government - tourism and agriculture are now high profile investment areas.
- Positive market forces
  - Demand from visitor markets has supported the growth of authentic food and drink and related experiences. Food and drink is a clear motivational trigger for trip decisions.
  - Consumer purchasing trends - Tasmania’s positioning as a source of high quality authentic produce has met with shifts in consumer purchasing in domestic and international markets.
- Leveraging partnerships – Tourism Australia’s national focus on food and drink has boosted Tasmania’s profile in domestic and international markets beyond what it could have achieved by acting and investing independently.

Competitive Strategy

Strategies are in place at State level, providing frameworks for growth for the tourism and agricultural sectors. Pristine environment and high quality produce are mainstays of competitive positioning for both the tourism and export sectors.

Tourism

The State’s tourism strategy, T21 specifically recognises food and drink as key selling points for the destination.

The vision for Tasmanian tourism as set out in T21, its State Tourism Strategy is for:

“Tasmania to be a world-leading destination of choice, with a vibrant visitor economy supported by our tourism and hospitality industries, strong business and education sectors and a community that embraces our visitors and all the benefits they bring”.

The strategy’s target is to grow annual visitor numbers to Tasmania to 1.5 million by 2020.

Agriculture

Food Hub Development

Territory Assets

Natural Resources
Tasmania’s rich natural resources underpin its status as a food and drink hub - its climate and topography support production of a wide range of crops and produce. Food and drink is a core part of the destination’s identity.

While a large part of the State can be best described as wilderness, it also has large areas of fertile land used by the dairy, horticulture and wine sectors.

Tasmania’s fertile soils, geographical situation, temperate climate and reliable rainfall position it ideally to grow a wide quality food and drink for local consumption and export to domestic and international markets. Seasonal advantage has allowed Tasmania to become an important fresh fruit exporter to northern hemisphere markets when local production is not available.

Its pristine environment is central to the quality-led positioning. Global food safety concerns have added to the local impetus. This has helped focused attention on Tasmania’s clean air, ample supplies of clean water and freedom from many pests and diseases.

Alongside mining and forestry, agriculture and fishing have been key drivers of Tasmania’s economy - dairy, fruit, fishing and beef industries are all well-established industry sectors. Alongside these established sectors is also an increasing recognition of the State’s niche gourmet cooking products such as seeds, honey, ginseng, olives, nuts, berries and truffles. Internationally, Tasmania is particularly renowned for its cool climate wines.

Provenance
Tasmania is long-established as one of Australia's prime agricultural areas, with this renown extending to international markets in recent times. This heritage is rooted in a wide range of produce including; seafood and shellfish, beef, dairy, fruit and wine.

The State is Australia’s oldest wine growing region and a renowned producer of red and sparkling wine. The nature of wine marketing and its intimate links with terroir helps ensure a close affinity with the tourism sector. Tasmania also became known as the Apple Isle throughout the 19th and 20th centuries, due to the importance of the region as a grower/exporter for domestic and international markets.

Identity
Being an island State, Tasmania has a strong sense of identity, distinct from other parts of Australia. This distinctiveness is reflected in its wide range of authentic locally grown produce.

Tasmania’s remote location and relatively small population has meant that visitors are important as customers for produce and food and drink experiences. The State’s capital city, Hobart has a population of approximately 200,000 and is the main hub for restaurants and supporting experiences. Tasmania’s agri-tourism sector is largely made up of smaller scale business operators with a focus on niche markets. These businesses derive benefits from the State’s strong branding as a visitor destination and food producing region.
Tourism Assets

Connectivity

Being an island, Tasmania has obvious connectivity challenges. Launceston and Hobart have air links with other Australian destinations however international links largely rely on onward connections from Melbourne and Sydney. Launceston, at the north of the State is Tasmania’s principle ferry port, acting as the gateway from a large drive tourism market from Melbourne. In common with most regional Australian destinations, Tasmania is dominated by the self-drive market.

Supporting tourism infrastructure, including hotel capacity has been growing to service increased levels of demand over the past 5 year period. Most growth has taken place around Hobart. The State Government has played an active role in encouraging appropriate new development and investment via a range of investment incentives and opening up national parks to ecotourism investment via expression of interest processes.

Capacity

Enablers

Tasmania’s governmental and organisational structures have played an important role in supporting the State’s growth as a food and drink hub. Recognition of the strong interdependency between the two sectors is recognised in the Agri-Tourism Strategy currently being developed.

Ambassadors

The State Government is committed to both the food and drink and tourism sectors as key pillars of the economy. The strong growth experienced in both the food export and tourism sectors in recent years is attributable in part to the strong leadership provided.

Common Branding is utilised for food and drink exports and tourism under the Brand Tasmania umbrella – attributes such as pristine environment and quality underpin both sectors.

Brand Tasmania is an umbrella for the State’s work, live, visit, invest propositions (www.brandtasmania.com) There is a clear link between food exports and tourism positioning - imagery of Tasmania as having a clear, pure, high quality environment is used to promote both tourism and food exports. The State sees itself as having “a food and drink advantage”.

Tasmania has a strong brand and is increasingly recognised for its liveability and as a place to do business. The Brand Tasmania Council is the custodian of the Tasmanian master brand and promotes the advantages of living, working, learning, visiting and doing business in the State.
Food and agricultural businesses have used the Tasmanian brand as a mark of quality that denotes place of origin. It is used to differentiate product in the market, it enables positioning at the high end and in niche markets and generally attracts premium prices.

Tourism is a core part of the umbrella Brand Tasmania initiative, with Tourism Tasmania (State Government tourism agency) leading marketing and development work for the sector. Discover Tasmania is the principle consumer portal and brand for the sector www.discovertasmania.com.au/what-to-do/food-and-drink.

Tourism Tasmania’s marketing has positioned food and drink as a central pillar www.discovertasmania.com.au/what-to-do/food-and-drink. Domestic and international marketing campaigns have led with food and drink assets and experiences.

Leveraging partnership benefits, working as a partner in the national Restaurant Australia programme has enabled Tasmania to generate a profile which otherwise would not have been feasible. When Tasmania was selected as the centre piece of a Restaurant Australia promotion in 2014, Tourism Australia’s CEO described the State as an “emerging food and wine superpower.”

Production
In-State production takes place across a range of sectors but is particularly notable in beverages and dairy. Wine, craft beer and distilling (whisky) production is notable as are a variety of branded cheeses which are exported and sold in domestic and international markets.

There is also a close relationship between the international backpacker market and agriculture with visitors providing seasonal labour as well as contributing to the visitor economy.

Skills
Culinary skills feature prominently in local tertiary education establishments. An example of a current initiative in this field is the great chef series www.greatchefsseries.com.au

The Great Chefs Series is an opportunity for some of the world’s best chefs to mentor, coach and collaborate with the developing talent within the Tasmanian hospitality industry. Developed by a local TasTAFE (tertiary college), students across the cookery, hospitality, tourism and events programme areas are delivering educational experiences that culminate with each ‘Great Chef’ and set of cookery apprentices delivering premium culinary events, showcasing Tasmanian vocational education and training ingenuity with premium produce in the form of a degustation.

From a tourism perspective, skills and training priorities include; being international-ready and having the ability to service a growing Chinese market.
Tasmania’s Agri-Food Plan 2016-2018 prioritises seafood, beef, dairy, wine, and fruit exports. Particular strengths include:

- Abalone and other fresh fish exports to China and Japan are booming
- Strong red and sparkling wine export sector
- Also renowned for fruit and beef (largely domestic)
- Long-established dairy sector with a number of nationally recognised retail brands.

The State has a clear view on competitive positioning for its food and aquaculture producers based around delivering consistently high quality produce from a pristine environment. The Government’s investment in expanded irrigation to increase the production of premium, value-added foods as well as capitalising on opportunities to access new markets, are important steps toward achieving this goal. Air freight capacity is recognised as a major constraint.

Food and drink sector trade groups play an active role in exporting, supported by the State Government (Dept of State Development, Brand Tasmania and Food and Beverage Tasmania). The Food and Beverage Tasmania initiative includes a buy from Tasmania directory which aids business in profiling produce to domestic and international markets. Asian markets are a particular focus for the state. This focus has been aided by a national free trade agreement recently established with China and the State Government fostering improved political and business links. Tasmania has had notable successes in exporting dairy, seafood and live shellfish to China.

([https://www.foodandbeverage.tasmania.com](https://www.foodandbeverage.tasmania.com))
Ambassadors
Tasmania is blessed with a large number of advocates in the chef and foodie community - both local and international. The phrases ‘Tasmanian’ and ‘quality produce’ now go hand in hand - with the State readily recognised as a foodies’ paradise. This advocacy is primarily driven by a passion for high quality Tasmanian produce. As well as driving positive consumer perspective, anecdotal evidence suggests that this is also now feeding through to investment in new food and drink experiences.

The Food Experience
In line with increasing visitor market demand, Tasmania has been establishing an increasing range of premium food and drink experiences.

Gastronomy
The State capital, Hobart, is a dining hub with Salamanca place/market renowned as a thriving focal point. 80 new restaurants, cafés and bars have opened in and around the city in the past two years, a number of which are in the high end category. It is fair to stay that the expectation of visitors on a visit to Tasmania is for a general high quality of produce, not solely that which is limited to Michelin starred venues.

Lead Products
Wine, dairy and seafood are the leading propositions from a visitor market perspective, alongside a wide range of niche offerings. Tasmania benefits from large numbers of artisan producers, delivering high quality produce - producers are well known domestically with a range of brands retailed throughout Australia.

Quality underpins the product offering, backed up by regular national and international award winners including and pricing at the premium end of markets, for instance;

- Tasmanian wine grapes achieve an average price of $2,575 compared to a national average price of $441
- Sullivans Cove French Oak cask HH525 was voted the World’s Best Single Malt Whisky at the 2014 World Whisky Awards.

Retail
Tasmania as a destination has retained more independent retailers than other Australian destinations, adding to a distinctive destination feel.

The Taste Tasmania campaign is a Government initiative to promote and support Tasmania’s food and beverages sector. The campaign invites consumers to enjoy what Tasmania has to offer by choosing Tasmanian at their local independent stores, restaurants and specialty retailers. IGA – Tasmania’s leading independent supermarket chain is a key supporter of the programme.

Visitors have ready access to purchasing local produce, including via farmgates and local providores who provide a means for small producers to showcase their products.

Events
Tasmania offers an ever-increasing programme of events, including;
Local food and drink is also featuring as an increasingly big component in other food and drink events i.e. cultural and music festivals and events. Events are used to create focal points for campaigns as well as driving off-season visit.

**Bookable Experiences**
A range of visitor experiences are available including:

- Large numbers of farmgate experiences.
- Fixed attractions including; oyster and mussel farms, chocolate and cheese factories and other food processing facilities, breweries, wineries, whisky distilleries and pick your own fruit experiences.
- Wine tours, cookery schools, fishing experiences, distilleries (whisky).
- Scenic flight, wilderness and cruise experiences have been brought to market – food and drink is part of the experience offering.
- Cookery experiences and cooking schools/courses utilising local produce.
- Luxury experiences such as Saffire Freycinet the best of Tasmanian produce as part of their services to guests.
- Trails which support the destination’s main market – driving/touring visitors i.e. Tasmanian Whisky Trail, Tasmanian Cider Trail, Tasmanian Beer Trail, Cradle to Coast Tasting Trail, Wine Tasmania wine trails etc. Support from the State Government (Dept of State Growth) was instrumental in bringing these new bookable products to market.

The depth and range of experiences promoted to market throughout Tasmania is consistent with positioning of the destination of a food hub. However, the State’s food and drink experiences do not exist in isolation - pristine environments, heritage, cultural activities…etc., all combine to create a compelling destination appeal.

Despite the depth of product and experiences available, numbers of bookable Tasmanian food and drink itineraries on the websites of leading travel agencies and tour operators are relatively limited. Those itineraries that are commercially available via distributors tend to combine wineries with other leading cultural, wilderness and heritage products i.e. the larger tourism businesses, and fall in the luxury category of experiences (http://activities.helloworld.com.au/en/17590/Hobart-tours/Food-Wine-and-Nightlife/d379-g6). The State’s leading role in the successful Restaurant Australia program has resulted in significant levels of market exposure for those leading experiences, along with increased recognition for the destination as a whole. However, independently booked travel remains the principal source of trade.

Similarly, the State’s main consumer website (www.discovertasmania.com.au) and those of the three regional tourism organisations do not currently offer extensive online booking functionality. As a consequence, online booking functionality is largely limited to individual business websites.

Tasmania’s tourism sector is typical of most rural tourism destinations, with SMEs and micro enterprises making up the majority of the sector. Consultation with Discover Tasmania suggests...
that the industry remains slow to embrace and understand the travel trade’s requirements. A factor highlighted in this reluctance to embrace travel trade opportunities is that Tasmania’s tourism growth has been sufficiently strong in recent years that operators have not felt the need to consider generating trade which necessitates commissions to be paid.

Visibility
Food and drink is a central pillar in Tourism Tasmania’s marketing. Domestic and international marketing campaigns have led with food and drink assets and experiences. Regional tourism organisations are active in initiatives such as trail development and packaging. It is also important to note that Tasmania’s positioning as part of the national ‘Restaurant Australia’ programme elevated international exposure for the State.

SWOT Analysis

Strengths & Opportunities
- Natural Resources – Tasmania’s pristine environment provides the basis for growing and producing a wide range of high quality food and drink goods. Tasmania also goes a step further, with its island location enabling it to excel in offering guarantees of biosecurity and food safety.
- Provenance - Tasmania is a long-established producer of a wide variety of produce, of which, wine and seafood are the most well-known.
- Identity Tasmania’s island location has helped drive a powerful sense of identity, distinct from mainland Australian destinations.
- Local Produce - Tasmania is well known for a range of food and drink products – from seafood and wine through to dairy – diversity and range of produce and visitor experiences is greater than many comparable destinations.
- Enablers
  - Strong commitment and leadership from Government – both tourism and food and drink sectors are growth priorities
  - Single brand architecture which tourism and food & drink fully embrace
- Ambassadors - a growing band passionate Tasmania food and drink ambassadors.

Weaknesses & Threats
- Accessibility – physical access remains a challenge for tourism and food & drink exports
- Bookable experiences - SMEs dominate the market. While wine producers and a number of professional operators are trade ready, the majority of the sector continues to experience challenges in offering fully bookable experience.

Results

Tourism
Currently, tourism contributes around $2.3 billion a year to the Tasmanian economy, or 9% of Gross State Product.

- For the year ending December 2016, there were 1.24 million visitors, up 7% from 1.15 million for the previous year.
- Total nights spent by visitors in the state increased by 6% to 10.66 million.
- Visitor expenditure increased by 10% to $2.14 billion.
- The number of interstate visitors to Tasmania increased by 4% to 1.04 million
- A short-term target for the industry is attracting 1.5m overnight visitors by 2020.
## Visitor Activities Undertaken in Tasmania

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<tbody>
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<td>Visit wineries</td>
<td>148,280</td>
<td>176,530</td>
<td>210,849</td>
<td>236,044</td>
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<td>103,149</td>
<td>124,253</td>
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<tr>
<td>Visit distilleries (from July 2013)</td>
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<td>57,441</td>
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<td>285,226</td>
<td>316,657</td>
<td>346,895</td>
<td>+9.50%</td>
</tr>
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Source: Tasmanian Visitor Survey

## Learnings

While some attributes are destination-specific, Tasmania’s experience presents a number of transferable learnings for UK destinations;

### Basic Assets

- **Tasmania’s strengths as a food and drink hub** rest to a significant extent in its **natural resources** - its remote and pristine environment enabling the production of a wide range of high quality produce. Its island location also enables it lay claim to high levels of food safety and biosecurity. Building on this pristine environment, Tasmanian produce and related tourism experiences are unashamedly positioned and sold as premium products and experiences. A number of the more remote parts of the UK have the opportunity to lay claim to similar attributes.

- **Authentic** locally produced food and drink products and experiences are at the heart of what Tasmania offers as a visitor destination. They are presented to customers in straightforward manner - high quality produce, with the family growers have a provenance rooted in Tasmania. The experiences are not manufactured – they are based on high quality local produce. Many UK destinations benefit from having a good range of food and drink products to present and package as tourism experiences – the opportunity exists to make more of the raw material, grown and produced in regions and localities.

- Tasmania has a powerful sense of **identity**, driven by its island location being separate from the Australian mainland. This identity is actively amplified and presented through its food and drink produce. When exported or presented locally to visitors, the provenance being Tasmanian or from a particular part of the State is clearly on show. Scotland is perhaps the best UK example of a destination that uses its lead food and drink products in this manner however the opportunity exists for other destinations to maximise the impact of its authentic food and drink products in a similar way i.e. Northern Ireland, Yorkshire, East Anglia etc.

### Capacity

- Strong political **leadership** has been an important enabler. Strategies in the tourism and food and drink sectors recognise the mutually beneficial opportunities available. While this is perhaps a stating of the obvious, a trigger for growth was a simple recognition that these mutual opportunities were available. The food & drink and tourism sectors have a large
number of representative bodies and organisations at State and local levels - while a single co-ordination mechanism for food and drink tourism has not been established, close and effective links are in place, with food and drink operators/producers recognising the importance of visitor markets.

- **Common brand attributes and values.** Food and drink sector development and tourism development take place within a single brand architecture. This has enabled the mutual benefits to be seen more obviously. In Tasmania’s case quality and pristine environment are the underpinning brand values and themes, however, areas of the UK can easily develop their own variations. Indeed, many already have them. As the UK starts the process of a future outside the EU – identifiers such as unique food and drink produce and experiences can play an important role to play from an export growth perspective.

- Tasmanian food and drink is unashamedly positioned as a premium set of products and experiences. From a tourism perspective, several exceptional facilities such as the Saffire Freycinet resort have lifted the game for the entire destination. Signature or hero experiences can be used to build a reputation around.

The Food Experience

- Tasmania benefits from what can be regarded as a **critical mass/volume of producers, growers and processors.** These translate to a broad range of experiences being made available to visitors. The small or boutique nature of many growers and the relative importance placed on farmgate or cellar door operations means that tourism is an obvious and important market for them. The depth and range of experiences is important in being recognised as a food hub. These have developed incrementally rather than via a ‘big bang’ – a process that can be replicated in the UK.

- **Leveraging the opportunities** provided by national food and drink marketing and product development initiatives such as Restaurant Australia has been hugely beneficial to Tasmania. Restaurant Australia has benefitted from large-scale funding support, which is unlikely to be able to replicated to the same extent in the UK however, there are clear benefits for regions in working as part of a larger co-ordinated programme.

- Tasmanian food and drink is a leading tourism proposition and is **well-integrated** with Tasmania’s other lead attractors i.e. wilderness, nature-based and cultural experiences. A practical demonstration is weaving food and drink into cultural, music and other leading events.
Nova Scotia

Introduction
Nova Scotia demonstrates a collaborative approach to successfully creating a dynamic food hub as part of a wider effort to turn around a failing provincial economy. Today Nova Scotia seafood exports are known across the world, while the destination is rapidly gaining recognition for its ‘braggable’ culinary experiences and the integration of unique food and drink elements into the experience of everything from key attractions to local communities.

(http://www.novascotia.com/#!)

Relevance to the United Kingdom
Due to its remoteness, rugged terrain, and periods of extreme weather, Nova Scotia is comparable in many ways to parts of Scotland, Wales, and Northumberland. The region spreads across 55,283 square kilometres with majority of the land remaining rural. Its eight ‘major’ cities host populations of 8,000 people on average, except for Halifax (403,131). This makes Halifax province comparable in population patterns to several areas of Scotland.

Summary
This case-study tells an interesting story of how a Canadian province has pulled back from the brink of an extended period of economic decline through identifying the structural concerns, and then developing and implementing an action plan for all Nova Scotians that addresses the need for change right across the spectrum of economic activities.

The resurgence in the food exports sector and the growth of culinary tourism through the development of unique experiences and a concerted effort on collaboration at all levels has had a transformational impact on Nova Scotia, as a food hub.

Diversification of product and markets, and a focus on creating value-add, infrastructural investments, and an in-depth understanding of market dynamics have worked together to produce significant results, with Nova Scotia now Canada’s number one seafood exporter. The city accounts for more than 27% of the country’s total national seafood exports, and the province leading the way in offering culinary-focused iconic experiences that have acquired ‘bucket-list’ qualities.

In terms of the Food Destination Framework, the focus for this case will be on: Export, Gastronomy, Lead Products, Events, Bookable and Welcome

### Food Destination Framework

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<th>Territory Assets</th>
<th>Tourism Assets</th>
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### Capacity

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<td>Production</td>
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### The Food Experience

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<td>Retail</td>
<td>Visibility</td>
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General Background

Nova Scotia is one of Canada’s three Maritime provinces, and one of the four provinces which form Atlantic Canada. It is the country’s second-smallest province, with an area of 55,284 square kilometres and is almost completely surrounded by 7,500 kilometers of coastline.

The entire province is located within the Appalachian Mountains and the region includes low mountain ranges, hills, lush river valleys, lakes and forests. The coastline has numerous offshore fishing banks which are submerged sections of the continental shelf, with many areas providing a rich habitat for marine life. The region’s cultural history is multi-faceted dating back to the Maritime Archaic Indian civilization, with their descendants, the Mi’kmaq Nation, and the subsequent waves of European settlers all coming to depend on the rich resources of the ocean and the productivity of the agricultural lowlands.

Despite this resource base, the economy of today’s 949,500 residents has been facing challenging times. The Ivany Report prepared by the ONE Nova Scotia Commission on Building Our New Economy in 2014, highlighted significant concerns – a province hovering on the brink of an extended period of decline with very low rates of economic growth (gross domestic product has been last among Canadian provinces, on average, over the past two decades), exacerbated by stagnant population growth and steady out-migration of young people – with population predicted to decline by almost 7% by 2040. Improving productivity and competitiveness in foundational rural industries, including tourism, agriculture, and fisheries, through innovation and adding value were identified as priority areas in improving the performance of the economy. Nineteen “stretch” goals have been identified to encourage Nova Scotians to push their limits and aim for profound change. These stretch goals have included specific targets for both tourism, and fisheries and agricultural exports, with targets set to double the value of both over a ten-year period.

The plan produced by the ONE Nova Scotia Coalition in response to the Ivany Report, ‘We Choose Now: A Playbook for Nova Scotians,’ seeks to build on the recommendations aimed at establishing a positive trajectory for

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1 One Nova Scotia Coalition, November 2015, We Choose Now: A Playbook for Nova Scotians (ONE Nova Scotia Coalition Collaborative Action Plan)
2 https://onens.ca/background/
the province through economic growth and demographic stabilisation. The underlying emphasis is one of collaboration on broadly shared agendas for change and renewal if the province is to realise a different outcome, and recognition that a dramatic shift is needed in how Nova Scotia responds to both opportunities and challenges. Together the Ivany Report and the Coalition Plan provide the context for change and have acted as a catalyst in pushing forward the development of Nova Scotia as a global food hub – a destination clearly recognised for its authentic flavours of land and sea and its burgeoning exports of foods, particularly seafood.

The Food Industry
The food industry is a key contributor to Nova Scotia’s economy and encompasses primary production in the fishery, agriculture and food processing. With 7,500 km of coastline, a moderate climate and a growing season that can stretch well into November, the province has strong natural assets. Today the province is Canada’s number one seafood exporter, accounting for more than 27% of the country’s total national seafood exports, and 35% of Canada’s shellfish exports. The industry includes 178 processing companies that provide year-round access to more than 50 species of premium quality fish and seafood, including its world famous Canadian hard-shelled lobster and cold-water shrimp, snow crab, scallops, white fish, and sea cucumber. The province is also home to the world’s largest supplier of frozen wild blueberries, North America’s largest processor of frozen carrot products, and the largest supplier of OMEGA-3 EPA/DHA to the global food and beverage industry. Nova Scotia is recognised for its export of maple syrup, and has a flourishing beverage industry exporting wines, spirits, beers (including craft beers and ales), juices, ciders, and bottled water.

Until recently, however, the outlook was not so positive. The food industries were struggling as competition from low-cost producers elsewhere in the world increased and the reduction of fish quotas directly curtailed seafood processing revenues. Between 2004 and 2012, seafood processing revenues fell by 24%, while hog farm cash receipts fell over 80% following a broad consolidation of hog farming across North America, with similar trends impacting beef and vegetable production.

Efforts to halt overall economic decline commenced in 2011 when the Government launched a ‘jobsHere’ strategy in 2011 to improve overall employment opportunities, productivity and competitiveness – with two of the key objectives being to create business opportunities in high-

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4 nsseafood.com, 2017, brochure: Why is the Nova Scotia Seafood Industry so Special?
5 https://www.novascotiabusiness.com/business/agri-food
value agricultural areas, and to explore ways of assisting businesses to become more globally competitive. In 2013, the Nova Scotia Department of Agriculture and Agriculture and Agri-Food Canada entered into a five-year (2013-2018) bilateral agreement to implement Growing Forward 2, the federal policy framework for agriculture. The framework is designed to focus on three areas: innovation, competitiveness and market development, and adaptability and industry capacity and has resulted in a 10-year provincial plan for agriculture: Homegrown Success. With this foundation and the more recent direction of the One Nova Scotia Coalition, the food industry has seen significant reversal of trends. After declining to a low of $963 million in 2010, domestic exports of Nova Scotia agricultural, fishery, and food products have grown by more than $1 billion to $2.1 billion in 2016. As shown below, the acceleration in seafood exports has put this Ivany goal on track to meet the target well ahead of time, although growth in agriculture exports has shown little growth.

![Seafood & Agriculture Exports](image)


The reversal of trends has largely been based on adopting a new approach and shifting away from a reliance on income support and subsidies that neither corrected structural problems nor showed real return on investment. Following near total shutdown of the groundfish fishery (cod, haddock, halibut etc.) in the mid-1990s, the seafood industry moved away from its traditional base in harvesting and processing ground fish, toward a much stronger focus on shellfish. Through this strategic shift, the fishing industry changed from one centred on export of relatively low-value ground fish commodities, to one that relies much more on higher value fresh, frozen and processed shellfish products – a move that succeeded in taking the industry from the brink of collapse to become a global leader.

This dramatic reversal in trends now provides the basis for building Nova Scotia as a strong food hub. Through creating global recognition for its food exports and working with the entire supply

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chain to provide world-class culinary experiences within the province, Nova Scotia has been transforming itself into an internationally recognised food hub.

**Competitive Strategy**

The work of the ONE Nova Scotia Coalition has provided the broad framework for strategic growth of the economy. The Coalition’s plan, We Choose Now, makes it clear that ‘Nova Scotia’s history and development have been inextricably linked to the ocean and always will be’. Alongside this outstanding comparative advantage (the coast is as long as the distance across Canada), the Plan highlights the province’s “5Cs” – culture, creativity, community, charm and character – a potentially powerful competitive advantage that represent Nova Scotia’s ‘secret sauce’. Developing a collaborative approach to building on these advantages has shaped strategic efforts and has contributed significantly to the success in becoming a food hub.

Maximising growth opportunities in seafood, with a focus on the burgeoning global potential of aquaculture’ is one particular strategy aimed at achieving Nova Scotia’s extraordinary ocean potential, has shifted attention away from the mature ocean (“capture”) fishery to a sector that is regarded as a booming growth area internationally. With farmed fish production now exceeding beef production globally, and almost half of human seafood consumption being derived from farm-raised stocks, it is recognised that Nova Scotia has clear advantages in developing its aquaculture industry – namely its access to clean ocean water; its 7,500 kilometres of coastline; extensive fisheries infrastructure and experience; established access to world seafood markets; and a strong ocean-sciences background. An Aquaculture Strategy developed in 2012 was already in place – one that outlined the government’s role in working with the private sector on ‘Farming Responsibly’, Aquaculture Engagement, Regulatory Safeguards, and Jobs and the Economy. Moving forward, the recommendations of the Coalition build on this strategy and emphasise the importance of adding greater value to the resource and delivering that value to targeted markets. This focus on product quality and product development throughout the catch-to-plate value chain, combined with the pursuit of internationally recognised certifications, provide a basis that can be further leveraged by branding. Growth is further generated through a collaborative approach to developing priority markets in the European Union, Asia, and the United States with a range of partners that include the Department of Fisheries and Aquaculture, Nova Scotia Business Inc., the ports, federal partners, the Atlantic Canada Opportunities Agency, and other Atlantic provinces and relevant industry associations.

In addition to building the ocean-based sector, the ONE Nova Scotia Coalition’s commitment to going global through strengthening innovation and competitiveness, has prioritised the local foods and beverages sector and has highlighted the need to upgrade Nova Scotia’s tourism experiences. These strategic directions, together with a series of trade enhancement programmes and initiatives designed to grow “SME” exports are working in synergy to further strengthen the province as a leading food hub. Given that tourism is a major global growth industry, the Coalition recognises that ‘Nova Scotia has an extraordinary opportunity to establish itself as a global culinary destination based on an exceptional variety of seafood, boutique agriculture, and local game’. To realise the goal of doubling the value of tourism revenues to $4 billion, the Plan identifies the need to meet the rising expectations of travellers that look for memorable experiences and show a willingness to pay for exceptional quality. Local food and
beverage is regarded as an important element of the 5Cs and a critical component of a potential visitor experience, with the additional advantage of being able to stimulate rural economies.

Building on this potential has involved key players such as Tourism Nova Scotia, Taste of Nova Scotia, the Winery Association of Nova Scotia, the Craft Brewers Association, the Restaurant Association, and the Tourism Industry Association. To take the lead in responding to the Ivany Report and developing a high-level strategic approach to the growth of tourism, the government established Tourism Nova Scotia as a provincial Crown Corporation in 2015. Led by a private sector board of directors made up of tourism leaders and business professionals, the organisation initiated a refresh of the provincial tourism strategy and identified four strategic pillars moving forward:

1. Invest in markets of highest return
2. Focus on world class experiences
3. Attract first-time visitors
4. Build tourism confidence.

Industry’s role complements the government’s efforts and is regarded as one that focuses on closing the sale, driving repeat visitation by exceeding visitor expectations, investing in product, and delivering world class experiences. The collaborative approach is further strengthened through Government’s role to align policy agendas to support community economic development, infrastructure improvements, and the attraction of inward investment; while communities play their part through partnering with industry to deliver destination development and marketing, and through the provision of visitor services.

Within this wider strategic context, a collaborative and synergistic approach has been pursued that is succeeding in elevating local foods and beverages, and in building new status for the culinary sector as an integral element of the destination experience. The following section outlines a wide range of initiatives and programmes, that taken together with the growth of food exports, have firmly established Nova Scotia as a recognised food hub.

### Food Hub Development

Nova Scotia is clearly well endowed with strong natural assets that have provided the basis for developing as a food hub and a leading exporter of a range of specialised foods. The length of the coastline; its ease with which it can export quantities of fresh products with ports that are ice-free year-round; and the province’s unique Tidal Bay appellation that reflects its coastal breezes and cooler but moderate climate providing a growing season that can stretch into November are all comparable advantages that the province has sought to leverage. While these assets all play an important role in the development of Nova Scotia as a food hub, it is the emphasis on developing competitive advantage through building capacity and developing the food experience that is of particular interest in this case study.

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7 Tourism Nova Scotia, November 2016, We’re All In, TIANS Summit Presentation
Capacity
Export
Investment in infrastructure and the development of new export markets has been critical to the rapid growth of food exports and the development of Nova Scotia as a food hub. In 2016, an estimated $187 million in seafood and lobster exports were shipped from Halifax Stanfield International Airport – up approximately $40 million from 2015. The airport’s investment in a new 17,000 square metre cargo pad designed to accommodate large cargo freighters, together with the 3,700-square metre warehouse facility recently developed by Gateway Facilities ULC, that includes over 650 square metres of temperature controlled space just minutes from waiting cargo aircraft have provided Nova Scotia with facilities that are unrivalled on the east coast. The ability to move cargo from refrigerated storage space to the cargo door in under two minutes is a significant improvement over trucking cargo to planes from smaller, off-site storage areas — and a clear competitive edge in the North American shipping industry.8

It is this competitive edge that has contributed to the substantial growth in new markets for fresh seafood. In 2016 for example, Qatar Airways Cargo launched a weekly service to Doha with a stop in Zaragoza, Spain. The new service has the capacity to carry up to 103 tonnes of cargo, with much of that being Nova Scotia lobster and silver hake. From its hub in Doha, the seafood is then transported throughout the Middle East and into South and North East Asia. In January 2017, Halifax International Airport Authority (HIAA) announced a further new cargo carrier, Yangtze River Express Airlines, that would service the Chinese New Year festive season – bringing the value of seafoods to this market to $25 million for January alone.9

With half of the province’s seafood exports heading to the United States, this diversification of markets is welcomed at a time when there is concern over the future of the North American Free Trade Agreement10.

Similarly, a recent economic impact study for the Port of Halifax highlighted the growing value of exports, particularly seafood, noting that an export container filled with Nova Scotia seafood is worth an estimated $73,650 – three times that of a regular container – in direct and spinoff economic benefits to the provincial economy.11 As demand for lobster and seafood continues to grow, especially within the Asian market, Nova Scotia is poised for continuing growth in seafood exports.12

9 Details sourced from various news items from the HIAA news centre: https://halifaxstanfield.ca/airport-authority/media-centre/news/
10 CBC News, March 29, 2017, “Province looking to Chinese market as hedge against U.S. protectionism”
11 Port of Halifax, March 2017, News release: Containerized seafood exports are a major economic driver for Nova Scotia
12 Details sourced from various news items from the HIAA news centre: https://halifaxstanfield.ca/airport-authority/media-centre/news/
In further response to this opportunity for growth, the global visibility of the seafoods export market has just been significantly enhanced through the official launch of the province’s own seafood brand in March 2017. The logo is the geographic location 45º North 63º West, coordinates that fall squarely in the province. The designation is meant to highlight Nova Scotia product specifically, with the pitch line: ‘Nova Scotia Seafood’ and ‘Pure Canadian product.’

THE Food Experience

Gastronomy
The combined goals for tourism and food exports have together acted as a catalyst for the growth of world-class culinary experiences. In response to the Ivany Report, Tourism Nova Scotia identified the need for a new approach – one that would result in ‘new experiences, new ways to experience the province’s icons, new icons to experience, new media buzz, and new markets and visitors.’ The importance of developing culinary tourism as a point of differentiation has been clear from the outset. However, to elevate and create new experiences requires an enhanced understanding of what the visitor is seeking. Through adopting Destination Canada’s travel-values based consumer segmentation tool, Explorer Quotient®, the province has gained considerable insight into what motivates travel within its key travel markets – which in turn provides the basis for a ‘holistic experience development approach’. Its primary higher yield market segments are known as Authentic Experiencers (27% of the province’s visitors, and 12% of the Canadian traveller population) and Cultural Explorers (16% of the province’s visitors, and 9% of the Canadian traveller population). A secondary higher-yield segment is the Free Spirits, which is currently under-represented within the province. All these segments have a high level of interest in culinary and local food experiences, but the Free Spirits in particular have a propensity for seeking out experiences that they can ‘brag about’. They look for excitement, while being able to take in a destination’s top attractions. With the expectations and travel values of this

13 Tourism Nova Scotia, November 2016, On Target: Creating Experiences with EQ (TIANS Summit presentation)
segment in mind, Tourism Nova Scotia launched the ‘World Class Experience EXCELerator Program in 2016,’ to drive the creation of new, purchasable experiences that will motivate travel to the province – specifically the Free Spirit traveller. To be successful requires more purchasable experiences that appeal to this segment – ‘that’s higher adventure, higher gourmet, higher luxury authentic experiences that provide the escape and fun that this segment enjoys.’ The spin-off to this approach will be gained from the social media buzz that this EQ segment will create, which in turn will raise Nova Scotia’s profile as a tourism destination.

In implementing this programme, Tourism Nova Scotia developed a number of market-tested “experience concepts” before seeking partners to develop the experiences. As a result of this initiative, ten new experiences have been launched in 2017 – all with a strong culinary component. These experiences vary from a steller star gazing feast and hike, to a pop-up vineyard dinner overlooking a UNESCO World Heritage Site, including the highly popular ‘dinner on the ocean floor.’ Not surprisingly, these experiences are becoming iconic in their own right, with the latter being described by a visitor as a “must do for your bucket list.”

**Lead Products**

In addition to these new experiences, Taste of Nova Scotia (established in 1989) has been working with its partners, Tourism Nova Scotia and the Atlantic Canada Opportunities Agency, and with its 180-member collaborative to create and market two distinctive signature culinary trails that showcase the food and drink of the province. 2015 marked the launch of the Good Cheer Trail – Canada’s only combined winery, brewery and distillery trail, with 38 participants. The trail was created by the province to promote the discovery of lesser-known regions of Nova Scotia, while building awareness of the gastronomic explosion happening from one end to the other. It also provides an opportunity to celebrate the province’s rich culinary history dating back to 1606, when Samuel de Champlain established the Order of Good Cheer in Port Royal. As the first gastronomic society in the New World, the Order of Good Cheer raised the spirits of early settlers and set the tone for centuries of

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14 Tourism Nova Scotia, November 2016, We’re All In, TIANS Summit Presentation
15 https://tourismsns.ca/news-events/intouch-blog/ten-new-visitor-experiences-launched
16 https://novascotiaculinarytrails.com/
good Nova Scotian food, drink and fun. The success of the trail and the growth of the industry are mirrored in the rise in the number of participants to 60 for the 2017 season.

In 2016, the Seafood Trail was launched as the first of its kind in Canada, again with the goal of elevating Nova Scotia’s reputation as a culinary destination. The trail was a rebranded and expanded format of the successful Chowder Trail and involves 83 participants offering a wide range of tide-to-table experiences, including four themed ‘sub-trails’—chowder, lobster, fish & chips, and oyster. Today’s participants include restaurants, retail outlets, tour experiences, and experiences offered by producers such as an oyster farm. The trails operate from June to October, and the experience is enhanced through a passport programme. Visitors collect passport stamps to earn rewards and to qualify for a grand prize draw. The passport includes information on the trail and the various stops, and is available in print format or electronically on a mobile device. Taste of Nova Scotia manages and delivers the Trail programme, including the implementation of the promotional campaigns and social media.

Events

Events and festivals provide a further opportunity to showcase Nova Scotia as a food hub, and to extend the season. The following table lists a number of the key events.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Craft Beer &amp; Local Food Celebration, Nova Scotia Food and Wine Festival</td>
<td>January to March</td>
</tr>
<tr>
<td>Nova Scotia Icewine Festival</td>
<td>February</td>
</tr>
<tr>
<td>Nova Scotia Craft Beer Week</td>
<td>May</td>
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<tr>
<td>3rd Annual Full House Craft Beer Fest</td>
<td>May</td>
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<tr>
<td>Wine &amp; Chocolate Tasting</td>
<td>May</td>
</tr>
<tr>
<td>East Coast Cider Festival</td>
<td>May</td>
</tr>
<tr>
<td>Apple Blossom Festival</td>
<td>May</td>
</tr>
<tr>
<td>Eastern Shore Cold Waters Seafood Festival</td>
<td>June</td>
</tr>
<tr>
<td>Halifax Ribfest</td>
<td>Late June/early July</td>
</tr>
<tr>
<td>Halifax Seaport Beer Festival</td>
<td>August</td>
</tr>
<tr>
<td>Halifax Oyster Fest</td>
<td>September</td>
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</tbody>
</table>

The Savour Food & Wine Festival hosted by the Restaurant Association of Nova Scotia, for example, is a series of unique culinary events celebrated throughout the winter months that are designed to showcase some of Nova Scotia’s great restaurants, mixologists and breweries, wineries and other beverage merchants. What commenced as a single event in 2002, has grown and evolved into six distinctive events which include the flagship Savour Food and Wine Show, in addition to Imbibe a Cocktail Event; Decadence: Chocolate, Wine and Cheese; Craft Beer Cottage Party; Rare & Fine Wine Tasting, and Dine Around.

More intimate events are hosted by specific resorts, such as ‘Devour! The Food Film Fest’ Tour at the Fox Harb’r Resort. This international festival celebrates cinema with food and wine in an experiential manner that includes film pre-screenings, guided food tasting and learning experiences, and gourmet meals.

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At this more intimate end of the spectrum, there are other unique local culinary events, such as those inspired by the Right Some Good initiative, and opportunities for visitors to interact directly with the farmer, producer, baker, cheesemaker, winemaker, and/or artisan at a variety of farmers’ markets across Nova Scotia. While the markets service local residents, they have become a key element of the destination’s culinary experience. ‘The 2015/16 Port of Halifax Economic Impact Study’ indicates that the recently constructed Halifax Seaport Farmers’ Market customers generated over $23.4 million in sales at the Seaport Market and $18.7 million in sales in surrounding businesses, resulting in over $42 million in economic benefit for the period under review.

Of course, at the other end of the scale, the culinary theme is equally strong at mega celebratory events. This will be particularly evident in 2017 when the Rendez-Vous 2017 Tall Ships Regatta is scheduled to stop at eleven host ports in Ontario, Québec and the Maritimes to honour the 150th anniversary of the Canadian Confederation. The race which commences at the port of Royal Greenwich in Great Britain has a four-day stop in Halifax. Taste of Nova Scotia is the Regatta’s provincial culinary partner, and will feature a Food Fare by the Sea, a dinner series on George’s Island, a family picnic on McNab’s Island and a fish cake breakfast.

Welcome
The collaborative approach to developing a food hub and achieving the goals set by the Ivany Report is further strengthened by the work of the Waterfront Development Corporation Ltd. – a Crown corporation. The waterfronts of Nova Scotia are seen as unique economic assets – places of inspiration, places for private sector investment, and places of action. The mission of the Waterfront Development Corporation is to harness the ‘waterfront’s potential by developing ideas, infrastructure, and experiences that stimulate business.’ The Corporation exists for the purpose of redeveloping and revitalizing waterfront lands. The vision states that ‘through our collaborative approach, we will create a new collection of animated and well-connected waterfront destinations that capture people’s imagination and distinguish us among the world’s greatest waterfronts.’ While not directly concerned with food and drink, the work of WDC is significant in creating the backdrop for high quality coastal destination experiences, including the setting for enjoying the province’s food and drink. The waterfronts of Halifax and the historic Lunenburg are particularly important visitor settings, where the WDC works on developing ‘high-quality events and programming that align with its objective of accessible, high-quality entertainment and activities representing the best of Nova Scotia.’ In 2017, for example, a new space (1,860 square metres) is opening on the Halifax waterfront as a venue for local food vendors and experiences. In addition, a partnership between the corporation, Taste of Nova

Right Some Good is defined as a pop-up dining food festival, and was the first food festival of its kind in the world. The event combined some of the world’s top-ranked chefs with local chefs and aspiring apprentice chefs, to provide dining experiences inspired by local ingredients and themes in impromptu locations staged in beautiful settings. Each dinner embraced the culture of the province through its natural beauty and local music, creating evenings that can never be recreated. The festival “pops-up” in Nova Scotia’s most famous and sometimes unexpected sites and transforms unique spaces into a fine-dining restaurant for one night only!

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18 Waterfront Development Corporation Limited Business Plan 2017-2018
Scotia and Tourism Nova Scotia is bringing a new interactive culinary programme to an updated Visitor Information Centre.

**Bookable Experiences**

The culinary experiences are all directly bookable by the consumer through the NovaScotia.com portal. A ‘tile’ presents each offer to the visitor and provides the opportunity for the visitor to plan through creating a ‘wish list’ and/or book directly with the lead business operator.

Tourism Nova Scotia provides clear direction to its operators on listing experiences and developing packages. Tourism businesses are invited to register as partners and to create an account for the ‘partner portal’. Once registered, partners can list experiences or packages, provided they meet
criteria that have been established by Tourism Nova Scotia. A series of tools, including an online video tutorial take the partner through each step of listing an experience, thereby ensuring uniformity in the information being presented to the consumer. In addition to featuring on NovaScotia.com, those experiences that have qualified as a ‘Canadian Signature Experience’ by Destination Canada are also listed in the Experience Collection.

Similarly, Tourism Nova Scotia works closely with the travel trade to encourage innovative ways of developing and selling packaged Nova Scotia product and experiences. A key element of this work is undertaken through the Tour Operator Partnership Program which is designed to increase opportunities for the optimal delivery of Nova Scotia packaged product to the travel trade and consumer. A detailed programme guide outlines activities and projects that are eligible for 50:50 funding with the provincial DMO, including attendance at in-market trade shows / marketplaces / sales missions; in-market promotional events; and familiarization tours for both FIT and group operators. A post-activity evaluation form is designed to quantify the impact of the programme on bookings, growth in business and the overall value generated.

**SWOT Analysis**

**Strengths & Opportunities**

- **Length of coastline – 7,500km.**
- **Maritime climate, length of growing season, and the province’s unique Tidal Bay appellation – with being situated on one of the cooler climate limits for vines, Nova Scotia’s soil and mesoclimates create some of the most distinctive premium-quality grapes in North America.**
- **Burgeoning wine sector that excels in sparkling wines and aromatic whites – supported by a strong research sector.**
- **With 30 to 40 craft breweries in the province, Nova Scotia can boast more craft breweries per capita than any other province.**
- **Diversity of fruit and vegetables – key strength and volume growth in wild blueberries (land set aside for blueberry growth spans 56% of the province’s farmland with 90% of the berries being shipped to 28 countries), while also producing maple syrup, strawberries, cranberries, field vegetables and apples.**
- **The province is home to 4,000 registered fishing vessels and 5,400 commercial fishing license holders. Its success has been greatly enhanced through its ability to diversify into aquaculture.**
- **Port (air and sea) infrastructure for exporting large quantities of foods while maintaining stable storage temperatures.**
- **Strong participation in North American and global seafood trade expositions – enhanced through regional/Atlantic growth strategies and collaborative approaches – spearheaded through the Government of Canada’s Atlantic Canada Opportunities Agency or through sector associations such as the Lobster Council of Canada.**
- **As North America’s largest deep-water, ice-free port, Halifax has the ability to handle the largest ships in use today.**

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19 The Canadian Signature Experiences® (CSE) collection is a qualified inventory of Canadian visitor experiences that best exemplify Canada’s tourism brand. The role of the collection is to capture the attention and imagination of consumers around the world to entice them to visit Canada now (Destination Canada).

• Diversifying portfolio of global export markets – by 2016 Nova Scotia has tripled its 2012 level of exports to China – which in turn reduces market risks.
• Emphasis on developing high quality, unique culinary tourism experiences that also enable the visitor to experience iconic attractions such as the Bay of Fundy.
• Comprehensive understanding of the consumer’s travel values.
• Strong strategic framework for economic development and commitment from a wide range of partners to work collaboratively in the development of Nova Scotia as a food hub.
• Innovative use of trails and events to support the culinary and beverages sector.

Weaknesses & Threats
• The initial economic base (as described by the Ivany report in 2014) was very weak – with a lack of public confidence in private sector leadership and issues relating to parochialism, disorganization and sectoral division in general, a lack of shared vision and commitment to growth.
• Concern over the future of the North American Free Trade Agreement. There is a strong dependence on the United States market, and seafood exports across the border have grown by 90% over the past four years (from $533 million worth in 2012 to $1 billion in 2016).
• Initial concerns regarding the new Nova Scotia seafood branding by organisations such as the Lobster Council of Canada that the new brand, which is a departure from the generic branding involving all three Maritime provinces, will create a degree of confusion in the marketplace.
• Ongoing focus on developing culinary destinations elsewhere in North America and overseas – the challenge will be in having sufficient resources to promote Nova Scotia adequately in a busy marketplace, although consumer to consumer messaging through social media will play an important role going forward.

Results
Significant success has been achieved. The seafood exports have already reached the 2014 goal of doubling in value within a decade with fish and seafood exports now valued at $1.8 billion\(^2\). (The Commission had set a goal of exports increasing to $1.72 billion from $860 million within 10 years). Food exports as a whole have risen to $2.1 billion.

• In 2016 Nova Scotia lobster exports were valued at $953 million, accounting for more than half of the province’s $1.7 billion seafood exports. This was followed by crab at $225 million, scallops at $141 million and shrimp at $113 million.
• The United States remains Nova Scotia’s biggest seafood export market at $1 billion. China came in second at $255 million, and the European Union was third at $204 million\(^2\).
• Data for 2015 indicates that seafood processing accounts for 78% of food manufacturing and 25% of total manufacturing revenues.

While there are no direct metrics for culinary tourism, the tourism industry as a whole had its best year in history in 2016 and its third consecutive year of growth, with 2.2 million visitors – an increase of 8% over 2015. Tourism revenue for 2016 was an estimated $2.6 billion, an increase of

\(^{21}\) February 2017, Nova Scotia Seafood Factsheet
\(^{22}\) nsseafood.com
5% and a 28% growth from 2010; and traffic through Halifax International Airport broke records with 3.9 million passengers. Visitors from the United States increased by 14% (partially a reflection in the increased value of the US dollar against the Canadian currency), overseas markets grew by 2%, and visitors from the rest of Canada rose by 8%\(^2^3\). However, the ONE Nova Scotia Coalition dashboard\(^2^4\) notes that the province is not yet on track to meet the visionary target of $4 billion by 2025.

Additional metrics developed by Restaurants Canada in 2016 show that there are nearly 2,200 restaurants, bars and caterers in Nova Scotia, and that the restaurant industry generates $1.8 billion and 4.6% of provincial GDP.

**Learnings**

The commitment to change and the significant success at developing Nova Scotia as a global food hub in just a few years is remarkable.

For the UK, it should be emphasised that this success is multi-faceted. The development of the culinary experience and market recognition of Nova Scotia as food destination is not simply a function of creating unique experiences. While this has been critical to the success of the province, Nova Scotia has also gained considerable leverage from the growth of its food exports. As its international acclaim grows, its positioning as a global culinary destination can only be enhanced.

Looking at the progress overall, a key contributory factor has been the development of a strong integrated policy framework that provided the basis for a new approach to doing business. The work of the ONE Nova Scotia Coalition and the direction that was set, has acted as a catalyst in generating transformational thinking, which in turn created a new level of enthusiasm and commitment for change. Within the tourism sector, the recognition of the need for ‘new experiences, new ways to experience icons, new icons to experience, new media buzz, and new markets and visitors amplifying Nova Scotia’ has been embraced by all industry partners and operators alike. Setting the stage for transformational thinking is the first step. For this to work in the UK, it must then be followed up with investment – investment in capacity building and the development of experiences, investment in defining and understanding target markets, and ‘investment’ in a collaborative approach to working together toward aligned goals and objectives.


\(^{24}\) https://onens.ca/
From a destination perspective, the focus on creating memorable and unique culinary experiences that also highlight the province’s cultural and natural assets has clearly established a degree of differentiation in the market. The current promotional campaign continues to showcase a multitude of experiences by contrasting the known and unknown aspects of the province in a visually compelling way. The combined result is a destination that offers surprise and intrigue, while delivering compelling flavours of land and sea.
Basque Country

Introduction
The Basque Country (Euskadi) is an autonomous region, in the north-east of Spain, on the Atlantic coast, sharing a border with the French Pays Basque.

The region has been marked in the past half century by a separatist movement, with occasional outbursts of violence. These times are past; however, in the population as a whole, there remains a strong sense of a unique identity. Traditional food and drink are seen as an integral part of that identity.

This case is primarily interesting for the approach taken by the Basque tourism agency, Basquetour, which has specifically identified food and drink as a tourism driver, and made it a central pillar of its tourism strategy.

Wine-tasting, cookery schools and cooking workshops
Learning where the ingredients come from, learning to cook them and having fun with them is one of the best ways to truly understand the region's cuisine and pass on a sense of passion and love of cooking.

For this reason the places associated with Basque Country Tourism organise different tastings, cooking workshops and show cooking demonstrations.
Relevance to the United Kingdom

Although an integral part of Spain, the Basque Autonomous Community has the status of nation, suggesting parallels, on an administrative and cultural level, with Scotland, Wales or Northern Ireland. At a little over two million, its population is comparable to Wales and Northern Ireland. However, it is significantly smaller than either, with a surface area of only 7,234 square kilometres.

The case is of interest also to parts of the UK that have a strong sense of regional identity, such as Yorkshire and Cornwall, that are keen to strengthen their local food offering and maximise its impact for tourism.

Summary

This case study shows how a destination of this scale can make use of its unique culture to create a successful food brand, and use food tourism as a driver for tourism.

The Basque Country’s culture is given prime importance in its tourism promotion, and held up as a reason for visiting.

The Basque language, unrelated to surrounding Latin languages, is a visible differentiator. It is reflected in the names of products, and provides an additional ‘flavour’ to local foods and dishes.

The Basque Country’s success rests on three main pillars:

- A passion for cuisine among the local population, evidenced by a multitude of culinary clubs or Txokos, in cities, towns and villages. This is reflected in the number of Michelin-starred restaurants;
- The readiness of local producers and food professionals to innovate and adapt to the market;
- A strategy of promotion of individual businesses and networking on the part of Basquetour, of which the central component is the Club Euskadi, described below, combined with a willingness of food professionals to support this initiative.

The Basque Country’s export strategy has benefitted from this collaborative ethos and these public-sector initiatives. On the world stage, Basque products are perceived as premium by major retail brands, and the Basque Country has systematically performed better than other regions of Spain, per head of population. This relates in particular to meat, fish, cheese and other processed products.

The wine industry is, of course, also important. Rioja Aleva is the largest region of wine production in the Basque Country, and its most powerful export product. In reputation, however, Rioja is linked to north-eastern Spain as a whole, not specifically to the Basque brand.

In relation to the Food Hub Framework, the focus for this case will therefore be on: Identity, Community, Enablers, Ambassadors, Export, Gastronomy, and Bookable Product.
General background
When Spain emerged as a major tourism destination in the 60s and 70s, the focus was on the Mediterranean coast, rather than on coastal regions with cooler climates. In the second half of the 20th century, the Basque Country saw moderate economic growth, but did not become a major tourism destination, in contrast with the French ‘Côte Basque’, that benefited from the aura of the fashionable resort of Biarritz.

The Basque Country has performed relatively well in comparison to the overall Spanish economy. The unemployment rate in 2013 was 16.3%, as compare to Spain’s 25.73%, but 45% among 16-24 year olds. This has improved over the last three years.

Importance of the agri-food sector
Although there has been a massive drop in primary food production, and a significant drop in cultivated land, the Basque country remains highly dependent on the agri-food industry. That sector is also politically important: the headquarters of the Basque Government are in Vitoria-Gasteiz, an inland city of 240,000 inhabitants, capital of the highly agricultural province of Alava.

Vitoria-Gasteiz has impressive environmental credentials (2012 ‘Green capital of Europe’), and boasts over 200 organic farms in close proximity to the city (2010).

The Basque Country’s perception of itself is also largely rural. The financial and industrial centre Bilbao has a population of only 350,000, albeit within a significantly larger conurbation, and San Sebastian, the tourism hub, has 190,000 inhabitants. The more prestigious food and drink regions are inland or on the relatively unspoilt coastal strip, including the prestigious Rioja Alavesa vineyards.

Tourism
According to the official Basque Country website (http://www.basquecountry.eus), more than three million visitors have entered the region as of 2016, and nine out of ten of these
visitors rate the destination as excellent. Sustainability is an important component. Last year the Basque Country was rated as a “Biosphere Responsible Tourism Destination.”

Though the region saw its greatest increase in tourism numbers during the early 2000s, they still continue to grow, with a 8.8% increase in booked rural and hotel stays in the region from 2014 to 2016. The average stay is at 1.82 days for visitors. Even more astonishing is the growth in agritourism which grew by 8.9%, to 137,035 tourists.

<table>
<thead>
<tr>
<th>Tourism Statistics as of 2016</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Michelin Star Restaurants</td>
<td>29</td>
</tr>
<tr>
<td>Number of Tourist to the region</td>
<td>3 million</td>
</tr>
<tr>
<td>Average spent per tourist</td>
<td>€124 (in 2014)</td>
</tr>
</tbody>
</table>


Triggers for the Basque Country becoming a food hub
The Basque Country agricultural sector has moved rapidly away from primary production to added value processed food, with a particular emphasis on wine and dairy products.

In the early 2000s, it became evident that food production and tourism could and should be linked, using the common factor of Basque identity.

An important trigger has been the seasonality of tourism. As this table shows, although the general tourism trend is for growth, hotel occupancy only hits 60 or 70% in the height of summer.

Hotel Occupancy

http://www.eustat.eus/web/comun/ExtractorElem.ashx?id=0000969g_c.jpg&tipo=i

It is assumed that food tourism is less seasonally sensitive and this has, indeed been demonstrated in other destinations.
Competitive Strategy

Food tourism is seen to have a positive impact on the wider economy, in particular in rural areas. The understanding that food production and tourism could be profitably linked has shaped a number of strategic decisions, as follows:

The Region’s three-pronged strategy can be summarised as follows:

1. With regard to consumer marketing, food and ‘Basque identity’ are the main and complementary pillars. On the Basque Country website, of the main menus, the first three are: ‘Discover Basque Country’, ‘Food and wine’, and ‘100% Basque’ ([https://tourism.euskadi.eus/en/](https://tourism.euskadi.eus/en/)). Under ‘Food and wine’, the consumer is guided immediately to specific restaurants, shops, wineries, cider houses and Pintxos establishments.

2. This highly directive approach is made possible by the Club Euskadi, which groups and actively promotes quality food suppliers and services, as will be described below.

3. The third prong is that of collaboration with the local tourism industry, inbound tour operators, who are encouraged to build products by working, in particular, with members of the Club Euskadi.

It is evident that these three goals are well understood by all stakeholders.

All web and mobile applications feed off the same data and materials. For both the consumer and the professional, it is a coherent picture, providing multiple access but a single source for everything Basque Country related.

Club Euskadi

Club Euskadi is the primary enabling tool for promoting food tourism and developing cooperation between food professionals. It is described as ‘a network of restaurants, bars, shops and other gastronomic establishments that meet a series of standards for rigour and commitment.’

In practice, it is much broader, including all types and categories of food professionals involved directly or indirectly in tourism. The list of possible Club Euskadi categories is as follows:

“Restaurants, Grills, Cider houses, Wineries, Gourmet shops and wine shops, Eat Pintxos, Cake shops and confectionery shops, Cheese factories, Canning companies, Producers, Museums and Interpretative Centres.”

Club Euskadi operates as an association, with an unpaid board and executive officers. Basquetour provides a full-time manager, and general support. Other functions are provided by members on a voluntary basis.

It has approximately fifty active members, regular attendees at meetings, involved in food-related activities, although the website shows significantly more. Members must meet specific requirements in terms of quality and commitment to the Club’s values. In return, membership offers the following benefits:

- The right to display the quality label;
- Participation in food-related and promotional activities;
- Regular promotion of each member by Basquetour and local tourism bodies.
Food Hub Development

In relation to the Framework, the Basque Country case demonstrates the value of a strong **identity**, supported by a **gastronomic tradition**, that has been exploited by the tourism authorities with the use of a tool, the Club Euskadi, that serves as a powerful **enabler**, and providing in addition a training ground for food **ambassadors**.

** Territory assets**

**Identity**
The Basque identity is a rich and powerful resource. For tourism promotion, it is a source of unique imagery, including local dress, architecture, traditional sporting activities and festivals.

In the realm of food and drink, it provides a guaranteed differentiator, including in the names of products and geographical locations. More importantly, it gives local producers, processors and retailers a sense of common purpose, which has enabled the emergence of a characteristic ‘Basque cuisine’: clearly differentiated from the standard Spanish equivalent.

**Capacity**

**Produce**
The Basque Country is known for two PDO cheeses, Idiazabal and Roncal, both made from native breeds, the Latxa and the Rasa Aragonesa. The PDO stamp has ensured continued quality of these products, allowing the export of these goods at a premium. Another well-known example is the Qualified Designation of Origin Rioja (DCO), which ensures that any wine made from grapes stemming from Bizkaiko Txakolina, Txakoli de Alava, and Getariako Txakolina, are labelled as regionally produced goods.

**Export**
In general, the Basque Country is strongly export-oriented. The region represents close to 10% of Spain’s total exports. The following table gives some indication of the volume of exports, in relation to head of population and overall GDP.
With regard to food and drink, the most important product exported is wine: the Rioja Alajeva region, for example, exported 180.8 million euros worth in 2015. Other sectors include cider; cheese; meat products (beef, lamb, pork); and seafood (including from the canneries).

**Enablers**
The primary enabler for development as a food hub is the Club Euskadi, described above, which has established a strong link between the public and private sectors.

The Club creates a positive dynamic within the food professionals’ community, that often feels ignored by local and regional administration. It provides an immediate incentive to front-line food professionals to raise levels of quality, but also affects producers. For restaurants, shops and food processors, criteria for membership includes the implementation of quality procedures such as the tracing of ingredients. This in turn provides a quality incentive to the members’ suppliers.

**Ambassadors**
A benefit for the region is that each member has a broad awareness, thanks to the Club, of the total food and drink offer of the Basque Country, and can therefore act as an effective ambassador to the outside world and visiting tourists. Members of the Club also regularly participate in training and educational activities, providing support to cooking schools and mentoring schemes.
The Food Experience

Gastronomy
The Basque Country has 10 Michelin starred restaurants, including five 3-star. It is recognised internationally as a gastronomic hub that offers comparatively modest prices, e.g. €40-60 for a one-star meal. Most are in San Sebastien and along the nearby coastal strip; however, a number are in inland areas. The gastronomic reputation began to grow in the 1990s, boosted by a few top-flight restaurants, such as famous Arzak, a pioneer of the new Basque cuisine school of gastronomy.

The Basque Country attracts international culinary students to attend institutions such as the Basque Culinary Centre and the Universidad de La Rioja. In addition, the informal teaching of traditional Basque dishes is passed down through courses, books and videos of high profile chefs.

Food community
Restaurants remain economically sustainable thanks to a sizeable foodie population in Bilbao (pop.350k) and San Sebastien (186k).

An important feature of Basque cuisine is the Txoko, a private club of food enthusiasts, who meet to cook and eat together in restaurants and other locations, under the guidance of experienced chefs. A Txoko are extremely popular: a single Txoko can have as many as 15,000 members. The town of Gernika (population: 17,000) has nine.

Events
The Basque Country is home to numerous food and beverage markets and festivals. On the ‘day of cheese’ there is a large fair celebrating Idiazabal cheese that has been in place since 1998, and is seen as an opportunity to introduce new cheeses into the market.

The Ribera Market, located next to the Ria de Bilbao, is an important gastronomic centre for all of Bilbao. Together seasonal and fixed markets play a critical role in the establishment of the region’s food and drink identity by providing a space for visitors to gain an authentic experience and for local food businesses to showcase their innovations.

Bookable Experiences
The private sector makes use of the information available from Club Euskadi, and the contacts that can be made from its members, to provide tourism services to visitors to the Basque Country. It serves effectively as a one-stop shop for operators that specialise in food tours, visits and events.

Taste of Spain offers a cooking experience at a Txoko, and a range of food market tours. Viator offers 15 ‘Basque Country Food Tours’, including this Idiazabal cheese one-day trip from San Sebastian:

“Become a Basque shepherd for half a day on this 3-hour Idiazabal Cheese Farm trip from San Sebastian. Visit a cheese farm and factory to learn how the region’s most famous cheese is made. Visit a stable and milking parlor, and watch the farm’s sheepdog in action. Finish off your tour with a delicious cheese tasting.

https://www.viator.com/tours/San-Sebastian/San-Sebastian-City-Tour/d5505-33221P8?pub=vcps
The government invests directly in the improvement of the overall quality of tourism offerings. For example, they have created a fund of 700,000 euros to help make tourism offerings more modern, by integrating innovative technology or creating a more sustainable tourism offering. A similar program is a 1,291,000 euro fund to help develop tourism offerings in key cities. ([http://www.euskadi.eus/gobierno-vasco/turismo/](http://www.euskadi.eus/gobierno-vasco/turismo/))

The push to establish high quality experiences for visitors can be seen in tour operator sites, as well as on the main Euskadi site with the introduction of their gastronomika badge of approved tourism offerings.

![Basque Country Gastronomic Tours](https://tourism.euskadi.eus)

**SWOT Analysis**

**Strengths & Opportunities**
The strengths are described above, and include: the Basque Country’s sense of identity; its focus on quality; strong farming traditions; and the passion of its population for authentic, innovative cuisine.

**Challenges & Weaknesses**
Capacity is an area of concern for local producers who would like to compete internationally, but lack the necessary volumes and experience. In addition, there are diminishing export incentives from local and national agencies.

The nature of the landscape makes the Basque Country unsuitable for intensive and extensive agriculture, with strong farming traditions, but with relatively small landholdings. Since the 1980s there has been a focus on developing premium products to protect margins.

The agricultural industry in the Basque Country has been heavily subsidized by National and EU funding. The dependency presents a risk for the region’s long-term sustainability.

**Results**

**The agri-food sector**
The Basque Country overall has seen an increase, from 2009 to 2013, of 33.6% in agricultural output, and a 42.2% increase in productivity. The region is a focal point for economic growth, not only within Spain but also within the EU as a whole.
Tourism
The following graphic demonstrates the interest of rural tourism. It shows trends in visits to agri-tourism establishments, where a primary selling-point is, of course, the access to local food, both in terms of its production and its cuisine.

![Number of incoming travellers in agro-tourism establishments by origin and month. Basque Country](http://en.eustat.eus/web/comun/ExtractorElem.ashx?id=0001154g_i.jpg&tipo=i)

Learnings
Learnings include:

1. That cultural differentiation can be a powerful motor in the drive towards a distinctive and interesting food and drink offer. Local language and dialect already provide a differentiation, which is too often wasted (cf. the ‘full Irish’ and ‘full Scottish’ breakfasts, which rarely pay more than lip service to the regions concerned).

   In the UK, cultural and linguistic differences are too often reduced to questions of accent, and an occasional reference to a small selection of iconic products: pasties, Yorkshire pudding, haggis, and suchlike. The Basque Country demonstrates that pride in cultural difference, when expressed through local products and cuisine, can create powerful reasons to visit, taste and experience.

2. That clarity of purpose and single mindedness can build a powerful and coherent offer. The three-pronged strategy described in this case has been implemented systematically.

3. The importance of underpinning such a strategy with clear evidence of quality, for example the use and promotion of DOPs.

4. The interest of a highly visible programme that engages the food tourism professionals. This case gives the example of the Club Euskadi. Well-designed, with dedicated resources, it has gained the trust of food professionals, who now actively collaborate in its development.
In general, the case demonstrates the importance of a clear vision, that allows the food and tourism sectors to move forward with energy, each confident that their initiatives will be complementary to the other.
Conclusion

The six case studies presented above are good examples of destinations that are in the process of developing as food hubs. However, there are many other interesting examples around the world, and this section will briefly make reference to a number of them.

The race to become a recognised food hub has become competitive, on a worldwide scale. This section identifies some of the characteristics of those destinations that have risen above the herd.

What makes a food hub successful?

This section looks, in turn, at ‘urban’, ‘rural’ and ‘coastal’ hubs. It identifies some of the key characteristics of any successful food hub, including:

- Strength of regional/government support;
- A clear identity or brand;
- Definition of strategies that cover both tourism and agri-food;
- Engagement of ground-level stakeholders: producers, retailers, tourism operators; etc.

This section will also cover points such as these:

- That food and drink hubs often develop organically from community and private sector origins rather than any pre-planned strategy or public sector driven initiatives – the public sector facilitates delivery via public realm and licensing regimes;
- That there are foods that make up the fabric of a city or region, for example New York with its bagels and pizza;
- That high-end gastronomy can be culturally driven, as is the case for French or Italian cuisine, or else are led by food and drink champions. This often is the case in the UK, where celebrity chefs and media figures may work to promote regional and quality food.

In addition, in particular, it will cover the role of the public sector:

- Agri-food authorities in facilitating change in agriculture practice and encouraging commerce;
- Destination management organisations in branding, promotion, and the facilitation of events.

Urban destinations: common attributes

Of the six major cases, Melbourne was a specific example of an urban hub. Reference to urban destinations can also be found in other cases, in particular Catalonia, where Barcelona plays an important role.

Urban food hubs will tend to share the following attributes:

- In an urban environment, food and drink is rarely positioned as the single leading visitor experience, but performs a high profile supporting role;
- The best urban food and drink destinations tend to be innovators, early adopters and leaders of food and drink movements - coffee, craft beer, rooftop bars, food-trucks etc.;
- Urban experiences are largely based around dining and entertainment, with events and tours providing specific points of interest for visitors;
• Tourists are important sources of trade, but demand for food and drink experiences is sustained in the most part by local audiences;
• Large wholesale food markets often serve as showcases and as visitor hubs.
• Unique food and drink often tells the story of immigration or the destination’s evolution – authentic links with heritage and its peoples - food and cuisine which has evolved from immigrant populations is celebrated and embraced;
• City precincts are frequently utilised as food and drink hubs, often being centres for certain types of cuisines – as well as being defined entertainment areas, precincts are often base around ethnic or migrant population hubs;
• Major cities are showcases for the region’s or nation’s produce. From a tourism perspective, menus will often reflect the wider region’s produce.

Urban destinations: other examples

Brooklyn, New York

Brooklyn is one of New York’s most notable consumer hubs as well as being a focal point for food production.

Features include:

• Food production focus - food manufacturing has the largest share of manufacturing jobs in Brooklyn. Since the recession ended in 2009, employment in food manufacturing has grown by over 3% and the amount of food manufacturing establishments has grown almost 12%.
• Most of the food and beverage manufacturing markets and hubs are based in the Williamsburg-Greenpoint and Red Hook-Sunset Park precincts. The Brooklyn Army Terminal is a former administration building which is being reinvented as a centre of food manufacturing. The New York City Economic Development Corporation invested $15 million on development.
• Brooklyn contains a large number of migrant hubs celebrated for certain types of cuisine, including:
  o Sheepshead Bay – seafood, Russian and Italian
  o Kensington: Polish, Mexican, Pakistani
  o Park Slope: Irish, Italian, French
  o Bay Ridge: Middle Eastern, Italian, French
  o Red Hook: African-American, Italian
  o Williamsburg: Puerto Rican, Dominican
  o Sunset Park: Vietnamese, Mexican, Chinese
  o Carroll Gardens: Italian
  o Crown Heights: West Indian, Jamaican
  o Bushwick: Japanese, Mexican, Dominican.
• MOFAD – the Museum of Food and Drink provides a specific food-based attraction. Programs include guided tastings, science demonstrations, cooking classes, seminars, discussions and hands-on workshops. MOFAD is a not for profit organisation which aims to promote the public’s knowledge of culture, science, production and commerce of food and drink. It is currently working towards building the world’s first large-scale edible museum exhibit.
• Smorgasbord is the largest open-air food market in the United States. It attracts between 20,000 and 30,000 people to Brooklyn every weekend. In 2016, it expanded with a weekly Sunday market in downtown Los Angeles.
Berlin, Germany
An influx of creative, trendsetting young people from all over the world makes Berlin a trendy city, brimming with art and creativity. It has a unique vibe: cutting-edge art, a growing start-up business scene, and is increasingly being known as a fashion and dance trailblazer. Contemporary Berlin mixes historic neighbourhoods and landmarks that tell of a turbulent history. The nightlife scene is extensive and the gastronomy varied.

Characteristics include:

• The vibrant visitor experiences – nightlife, festivals, contemporary architecture and avant-garde arts, Berlin has become a centre for liberal lifestyle, modern zeitgeist and low-cost, high quality living;
• Distinctive food and drink as part of this mix – in many ways, reflecting the major changes in Berlin’s history and development;
• A range of food unique to, or synonymous with Berlin – kebabs, currywurst, pork dishes, donuts - Currywurst is celebrated in a currywurst museum;
• Beer gardens, craft beer – reflecting a strong beer culture, with no traditional closing hours;
• A wide range of styles, from fine dining to retro East German cuisine; also Turkish immigrant cuisine, celebrating the largest Turkish population outside Turkey;
• A range of restaurants specialising in Berlin or German dishes;
• The famed KaDeWe department store food hall.

Rural destinations: common attributes
‘Food’ implies agriculture and rural settings, in particular as local provenance grows in importance for consumers. Several of the six cases refer primarily to rural destinations, including Flanders and the Basque Country.

Successful rural food hubs tend to have the following in common:

• A farming tradition, with quality agricultural products;
• Local pride in the quality of food available;
• Nearby urban areas, with populations interested in innovative, quality and local food, and with chefs, SMEs and others potentially interested in relocating to rural areas;
• Innovations among the producers of food and food processors, offering a contemporary slant on traditional food;
• A strong interest in local food and traditions by local restaurants, shops, bed-and-breakfasts and other tourism professionals, acting as ambassadors to visitors;
• An aspiration for international recognition by a number of highly-rated restaurants, in rural locations;
• Local groups, collectives or associations supporting food-related festivals, markets and other events.

Rural destinations: other examples
Boyeue Valley
The Boyne Valley lies 50 kilometres north of Dublin, in County Meath. Despite proximity to an international airport, attractive landscapes and the UNESCO World Heritage Neolithic site of Newgrange, international tourism to Meath is a fraction of that of the west coast. The Boyne Valley Food Strategy 2016-2021 was officially launched in October 2016, with five primary goals:

1. Create a Louth/Meath Food Network
2. Become the Food Champion of Ireland’s Ancient East
3. Develop the Micro Food Economy
4. Target the ‘90 Minute Drive’ Visitor
5. Strengthen the Food Business Skillset.

The County is developing the strategy on the foundations of a major asset: that of its food network, composed of producers and retailers from Meath and Louth. It is a private initiative, with 50-60 members, run on a volunteer basis, encouraged and supported by Meath County Council, in particular by their tourism officers.

The focus of the network is the Boyne Valley Series, a ‘festival’ that can run over four or five months, with as many as forty or fifty events, held in multiple locations. (https://www.boynevalleyfoodseries.ie/)

Although successful in this case, such networks can be fragile. Run by volunteers, they can be put at risk by the personal circumstances of key members. They are also dependent on quality communication, for which the members may lack sufficient funds and skills. Meath Council’s commitment is therefore:

1. The appointment of a dedicated Food Development Officer;
2. Proactive engagement between all agencies connected with the food sector, from both counties;
3. Provision of financial support in order to ensure the execution of the strategy;

The impact is already beginning to be felt. In 2016, the Boyne Valley won the ‘Ireland Foodie Destination’ award.

Margaret River

Located approximately three hours south of Perth, Margaret River has a great depth of food and drink experiences, with its wineries being a lead proposition.
The region has been particularly successful in establishing an effective working relationship between the tourism and food & drink sectors. Key factors include:

**Strategic alignment of tourism and food & drink objectives**

A memorandum of understanding has been established between the local tourism organisation – Margaret River Busselton Tourism Association (MRBTA) and the regional development agency, South West Development Commission (SWDC). A Food and Wine Promotional Plan was produced in 2016, with wine export volumes and trade opportunity development incorporated alongside visitor targets. The purpose of the Promotional Plan is to develop a cohesive and collaborative wine and food tourism model to connect industry with stakeholders in domestic and international markets.

**Adoption of common branding**

‘Your Margaret River Region’ (YMRR) branding has been adopted by tourism and food & drink industry partners and is used where relevant to their respective target markets. Examples of recent collaborative activity include:

- 2016 marketing campaign targeting Singaporean visitors, “First Class in a Glass” - Singapore is a target visitor and wine export market;
- Approximately 15% of MRBTA’s members are wine businesses, demonstrating the close working relationships between the sectors.

**Coastal destinations: common attributes**

This essentially refers to destinations that have a strong seafood tradition. It is most directly addressed in the Nova Scotia case.

Successful coastal food hubs have the following common attributes:

- Ports and harbours with a fishing tradition, landing supplies of fresh fish and seafood;
- A growing market for fish and shellfish;
- Local pride in the quality of produce;
- Interesting geographic and historical features which lend themselves to promotion as a tourist experience;
- Access for visitors to experience the coast - at ports and harbours and through boat trips;
- Opportunities to taste the flavours of the coast with fish/seafood based restaurants and menus;
- Maritime linked events and festivals supported by local populations and acting as a tourist draw;
- Fishing, fish processing facilities and other industries related to the sea, representing an important component of the local economy;
- Fish to table initiatives between fish markets and restaurants;
- Innovations among the producers of food and food processors, offering a contemporary slant on traditional food.

Coastal destinations: a further example

Iceland
For the past few years, Iceland has featured on growing numbers of ‘to-visit’ destination lists. The resident population of 340,000 (roughly the size of Cardiff) has seen visitor numbers grow from 490,000 in 2010 to an estimated 2.3 million in 2018, and an income forecast of 560 billion kronur ($5.1 billion). Since the banking crisis, Iceland has emerged as one of Europe’s most dynamic gastronomic destinations. Fisheries and related sectors — labelled “the ocean cluster”— are the single most important part of Iceland’s economy. In Icelandic coastal towns and villages, most people make a living from fishing and fish processing.
Characteristics include:

- Icelanders have pioneered innovative ways to utilise cod, the nation’s most economically important fish species. The advent of new products and markets has seen the value creation in cod production rise dramatically. As an example, one traditional Icelandic restaurant serves Cod’s head as a main course delicacy;
- Successful use of by-products has increased 30-fold and export value has grown by a factor of four. For example, cod heads are dried and turned to fertiliser for export to Nigeria; a specialist tannery technique turns delicate fish skins into a luxury product exported to major European fashion houses;
- Major seafood events attract substantial numbers of tourists e.g. Fiskidagurinn, Dalvík’s Great Fish Day festival where participants enjoy a free seafood buffet which is designed to encourage awareness and interest in fish; Maritime festival and Day of the Icelandic Fisherman at Grundagarður, and the Hófn Lobster Festival;
- Increasing numbers of food producers provide authentic visitor experiences with a strong story-telling angle e.g. Ekta Fiskur, a fifth generation Bacalhau (dried and salted cod) fish production business (http://www.ektafiskur.is/);
- Business and tourism links with educational establishments like Holar University College, a world-leading specialist in Aquaculture (Salmon and Arctic Char) and Equine Science;
- Boat tours providing experiences such as whale watching, and eating ‘Viking Sushi’, straight out of the seawater;
- Reputation – hákarl (fermented shark) is on many visitor hit-lists with certificates offered to those who try it.