

CULINARY TOURISM IN ONTARIO



STRATEGY AND ACTION PLAN 2005 — 2015



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BACKGROUND



BACKGROUND

OVERVIEW OF CULINARY TOURISM IN ONTARIO

Culinary tourism is not new to Ontario. For decades, travel and exploration of this province has included discovering the “tastes” of our regions. While food and beverage is part of every tourist’s experience, culinary tourism is a new term that explicitly links the consumption of food and beverage with travel. In 2001 the Ministry of Tourism, Culture and Recreation, and the Wine Council of Ontario commissioned the writing of the Wine and Culinary Tourism Strategy Report as a direct result of the growth in the wine and culinary sectors in Ontario during the 1990s. The 2001 Report identified wine tourism and food tourism as important economic drivers that would help increase tourism specifically in the Region of Niagara and the City of Toronto. The report mentioned other Ontario regions such as Essex County, Pelee Island, and the burgeoning wine region called Prince Edward County as having the potential to establish a culinary tourism market.

Some of the projects undertaken were:

- The Wine Council of Ontario: adding highway signs pointing out wineries and wine routes, wine and culinary adventure guides for tourists, quality assurance programs for wineries across Ontario
- Savour Ontario: a select group of country inns, wineries, cooking schools and local producers came together to market themselves under the banner, Savour Ontario
- In Niagara: the establishment of the Niagara Wine and Food Classic and the development of the Niagara Culinary Alliance
- In Toronto: Food Festivals and Events were initiated including Summerlicious and Winterlicious
- In Prince Edward County: the concept, development and the successful creation of the Taste Trail, and the completion of a culinary tourism strategy for the region
- In Muskoka, a new Culinary Association was established including work on a regional inventory and regional strategy

THE 2005 CULINARY TOURISM REPORT

The Ministry of Tourism (MTOUR) commissioned the preparation of the Culinary Tourism Strategy Report 2005 as a follow up to the Ontario Wine and Culinary Tourism Strategy 2001.

During the years following the original 2001 report, a committee of industry volunteers, from the GTA and Niagara, formed a committee known as the Ontario Culinary Tourism Advisory Council (OCTAC) with a mission to act as advisors to the Ministry on culinary tourism in Ontario. One of the OCTAC recommendations to the Ministry was to create an industry-based culinary tourism strategy and action plan that would be implemented by industry, supported by government and most importantly represent all regions of the province.

The focus for this report was to produce a number of key strategies that would become the foundation of a successful implementation of a provincial strategy while being supportive of regional and local culinary tourism strategies and activities. These key strategies include:

- Establish strong leadership, organization and industry linkages
- Strengthen and enhance communication to stakeholders
- Encourage research, education and training
- Support established and promote new culinary tourism products and development
- Establish mechanisms for funding and support

Stakeholder Expectations and Desired Outcomes of 2005 Report

In preparation of the 2005 Culinary Tourism Strategy, industry stakeholders were asked to identify their expectations and desired outcomes for this report. In addition to seeing a provincial strategy implemented, their expectations were that this implementation would result in five specific outcomes:

1. Partnerships: an increased number of partnerships would be initiated and would materialize among industry stakeholder groups including partnerships throughout the culinary tourism supply chain, across industry sectors and among national and international organizations and associations that support culinary tourism
2. Marketing and Promotion: increased support to market-ready culinary tourism products and destinations as part of the provincial tourism strategy and, increased funding to develop new culinary tourism products that would build a stronger brand identity for the Province of Ontario.
3. Organization: create industry cohesion and organization supporting provincial culinary tourism strategy - producing a strong collective voice to influence government policies and funding decisions, increase communication throughout the stakeholder group and to formally link regional culinary tourism strategies and activities
4. Economic Impact: a provincial strategy would encourage a greater number of investments made for economic development that are strategy-based and beneficial to an increased number of regions throughout the province.

5. Framework for Action: develop a provincial framework to accelerate the process whereby stakeholders could mobilise and implement culinary tourism initiatives and projects

The 2005 Report strategies and action plan are consistent with feedback received by the industry stakeholders who want to encourage tourism growth, partnerships, and communication.

Research Methodology

This 2005 culinary tourism report is a strategic plan for Ontario. It is the result of research findings from a literature review, interviews, and industry stakeholder surveys. The literature review consisted of an in-depth global review of culinary tourism research, including reports on food tourism, gastronomy, agritourism and more general tourism reports from Australia, Scotland, South Africa, USA, and the Canadian provinces of British Columbia, Quebec, and Nova Scotia.

There were 56 interviews conducted with industry leaders across Ontario representing food producers, food services, tour operators, festivals and events organizers, associations, communications-media, academics and Ministry staff. Two stakeholder consultation sessions were attended by 22 industry representatives, electronic surveys were issued to 125 stakeholders with a 23% return (28 responses) as well as a survey conducted during the Culinary Tourism Symposium (Toronto, March 2005) where 125 surveys were handed out to which 36 responded (29%).

A NEW VISION AND MISSION FOR CULINARY TOURISM IN ONTARIO



VISION

Ontario will be the destination of choice for travellers seeking to enrich their understanding of our diverse regions and cultures through authentic culinary experiences



MISSION

Culinary tourism in Ontario will:

- help build and sustain regional identities, agricultural resources and food supplies
- present opportunities to develop new quality tourism products and experiences
- become a way in which we tell our story and share it with pride

DEFINING CULINARY TOURISM FOR ONTARIO

To suggest there is only one possible definition of culinary tourism is to suggest that there is only one Ontario cuisine and a single way to look at tourism. The research for this report uncovered dozens of definitions and interpretations of culinary tourism throughout the world. The mandate of this report included the creation of an industry-based definition of culinary tourism. Industry leaders across Ontario were asked their definition of culinary tourism. The top three definitions included:

- Travel that includes the appreciation and consumption of local/regional foods
- Travel for the primary purpose of experiencing and enjoying food and beverages or to attend culinary-specific activities such as cooking schools, visiting a food or beverage production/processing site, a farmer's market or a 'taste trail'
- Unique dining and beverage experiences

Industry stakeholders were asked to identify key descriptors or characteristics that need to be included in a definition. Their answers included:

- experiencing food out of the 'everyday situation'
- an experience and appreciation of the local cuisine of the area being visited including sampling or consumption
- experiencing taste by learning about locally and provincially grown food from the farm to the restaurant
- celebrating local culture, enjoying new food and sensory experiences, and purchasing them to take home
- understanding a 'sense of place' through the consumption of unique ingredients and/or production and preparation technique of foods and beverages

Based on this feedback a new definition of culinary tourism was crafted to include several critical components that would help distinguish culinary tourism from other culinary activities: activities such as 'learning, appreciation and the consumption' of food and drink were cited, as was the 'use of local products'. Many of the stakeholders mentioned the need to include activities that help demonstrate cultural and regional diversity, history or, could tell the story of available resources of a particular place or existing tourism destination. It was clear that culinary tourism needed to be experiential: unique and memorable, authentic to a particular person, heritage, place, or product. The definition of culinary tourism would need to open a door to the establishment of new tourism products and new tourism experiences using the culinary arts, the craft of cooking and the exploration of food and beverages made in Ontario.

PROPOSED DEFINITION



Culinary tourism includes any tourism experience in which one learns about, appreciates, and/or consumes food and drink that reflects the local, regional, or national cuisine, heritage, culture, tradition, or culinary techniques.



SUPPLY CHAIN



SUPPLY CHAIN



THE SUPPLY CHAIN FOR CULINARY TOURISM

The supply chain for culinary tourism is particularly complex due to the numerous types of products and services that comprise a culinary tourism experience. Each of these products and services such as restaurants, spas, resorts, hotels, farmers markets, cooking schools, wineries, and breweries, all have their own distinct supply chain making the culinary tourism supply chain appear as a three dimensional model rather than a simple flow chart.

Tourism, including culinary tourism, exists as part of “the demand economy”. In the demand economy – especially for complex products like culinary tourism – the entire supply chain has an impact on the brand. It is essential, in the provincial culinary tourism strategy, that all the links in the supply chain understand that they depend on each other - not just for supply, but also to help create the very brand that will represent and market culinary tourism in Ontario.

The supply chain for culinary tourism consists of:

- farmers, growers, producers, suppliers, owners, operators
- processors, distributors, transporters
- wineries, breweries, restaurants, hotels, inns, outfitters, cideries, spas
- events, attractions, entertainment, markets, cooking schools, culinary colleges, tour operators
- media, educators, DMOs, marketers
- tourists
- government, banks
- countries, provinces, communities, cities, and towns

THE SUPPLY-SIDE OF CULINARY TOURISM

The following table summarizes the “supply-side of culinary tourism” – facilities, activities, events, and organizations that support culinary tourism.

Supply-side of Culinary Tourism

Facilities	Activities	Events	Organizations
Buildings/Structures <ul style="list-style-type: none"> • Food processing facilities • Wineries • Breweries/Cideries • Farmers’ markets • Food stores • Food-related museums • Restaurants 	Consumption <ul style="list-style-type: none"> • Dining at restaurants • Picnics utilizing locally-grown produce • Purchasing retail food and beverages • Pick-your own operations 	Consumer Shows <ul style="list-style-type: none"> • Food and wine shows • Cooking equipment, kitchen shows • Product launches 	<ul style="list-style-type: none"> • Restaurant classification/certification systems (e.g., Michelin, Taste of Nova Scotia) • Food/wine classification systems (e.g. VQA) • Associations (e.g., Cuisine Canada, Slow Food) • Media • Hospitality and tourism associations • Marketing agencies and organizations (OTMPC)
Land uses <ul style="list-style-type: none"> • Farms • Orchards • Vineyards • Urban restaurant districts 	Touring <ul style="list-style-type: none"> • Wine regions • Agricultural regions • City food districts 	Festivals <ul style="list-style-type: none"> • Food festivals • Wine festivals • Harvest festivals 	
Routes <ul style="list-style-type: none"> • Wine routes • Food routes • Gourmet trails 	Education/Observation <ul style="list-style-type: none"> • Cooking schools • Wine tasting/education • Visiting wineries • Observing chef competitions • Reading food, beverage magazines and books 		

Facilities refer to buildings and land uses associated with food production or preparation, and distribution services ranging from food processing operations to restaurants. Land use involves public access to land or landscapes that can be viewed and appreciated by the touring public. Designated routes through culinary landscapes are also a culinary facility.

Activities are what culinary tourists are drawn by with the opportunity to consume - such as dining at restaurants or sampling wine, cider, and beer. Additional activities include education, such as attending cooking schools, participating in formal wine tastings, and independent reading of books and magazines devoted to food.

Events include consumer events highlighting both food products (such as cheese, fresh produce, wine, fruit wine, cider, and beer), cooking equipment, and food and wine festivals.

Organizations include those who serve the interests of culinary tourists and help support the development of the culinary tourism market. Associations also contribute to the long-term growth and promotion of culinary tourism.

CULINARY TOURISM - RELATED ENTERPRISES

The tourism sector is dominated by small and medium-sized enterprises (defined as enterprises with fewer than 20 employees), and the same can be said of culinary tourism.

The following table identifies the number of enterprises in a variety of industries that are related to the provision of culinary tourism products (unincorporated and sole proprietor enterprises are not included). The industries range in size from very small – only nine incorporated distilleries in Ontario to very large – nearly 10,000 limited-service restaurants. Of the nearly 350,000 incorporated enterprises in Ontario, 84% of them have fewer than 20 employees. Generally, culinary tourism industries have a similar or smaller percentage of SMEs. Only the broad category of all agricultural industries (which included farms) has a higher percentage of SMEs. The culinary tourism sector is not dominated by SMEs any more than the rest of the economy, as a whole.

Numbers of Incorporated Culinary Industry-Related Enterprises and Percentage that Are SMEs

Industry	Number of incorporated establishments	% < 20 employees
Breweries	68	82%
Wineries	121	88%
Distilleries	9	33%
Fruit and vegetable markets	217	73%
Full-service restaurants	9,915	72%
Limited-service restaurants	9,825	78%
Drinking places (alcohol)	1,173	79%
All agricultural industries	8,549	93%
All food processors	1,702	61%
Total incorporated establishments	349,410	84%

Source: Statistics Canada, *Business Patterns*, June 2004

KEY TRENDS AND DRIVING FORCES OF CULINARY TOURISM



KEY TRENDS AND DRIVING FORCES OF CULINARY TOURISM

1. The Importance of Local

Culinary tourism is clearly tied to a sense of 'place' - it is directly and indirectly affected by what is occurring on an international, national, and local level of government. Culinary tourism responds to economic, tourism and agricultural policy. This idea of 'local' as one of the potential drivers of culinary tourism is closely associated with building sustainability within a business, region, or province. Making optimum use of goods and services produced within the country, region, and community, as inputs to tourism, can add value to existing tourism experiences and destinations and can reduce the need to buy or import goods or services.

'Local' initiatives are those that portray or provide an expression of a community or 'locale'. Developing strategies that enable the promotion, use, and expansion of regional and local foods can directly affect the marketplace that supports culinary tourism. These integrated strategies can help promote economic development and the creation of sustainable food systems on national, regional, and local levels. In 2001, the Canadian Tourism Commission (CTC) hired PricewaterhouseCoopers to conduct a post-911 survey of their American market. The study included the phrase, "local cuisine", as one possible activity of interest to Americans. Forty-four percent of respondents indicated local cuisine was "always" or "often important" in selecting a destination for a trip – a higher percentage than any of the other 21 activities.

2. Understanding the Market and Creating Value for Operators and for the Tourist

In terms of global culinary tourism, Ontario is not regarded as a leader. On a domestic level, industry stakeholders ranked British Columbia, Quebec, and Nova Scotia ahead of Ontario. However, many of the stakeholders felt that Ontario had the potential to become a culinary tourism destination. With this in mind, understanding the target markets for culinary tourism becomes very important and, grasping the sustainability of the market through the analysis of the economic, social/cultural, and environmental value associated with the markets, will increase the supply chain's likelihood of success and the consumers' likelihood of enjoyment.

Target Markets

The potential target markets for culinary tourism in Ontario consist of all travellers:

- Domestic: Residents of Ontario travelling within Ontario
- Domestic: Residents of Canada travelling to Ontario
- International: Residents of all international countries permitted to travel in Ontario

These markets can be further broken down by understanding what motivates the traveller:

- Primary: Travellers whose main focus and intent is for a culinary tourism experience
- Secondary: Travellers' focus on culinary tourism is shared with another tourism motivator such as golf, shopping, visiting family and friends. Culinary tourism is part of their itinerary.
- Tertiary: Travellers' itinerary or motivator does not include culinary tourism. Culinary tourism experience is impromptu or ad hoc to their original intent.

Creating Value: Economic, Social, and Environmental Economic Value

Culinary tourism can produce additional economic value to regions as determined by Richard Wade and David Martin of Ryerson University (2005) who surveyed 600 tourists in Niagara-on-the-Lake. Findings indicated that the economic contribution of culinary tourists was greater than the non-culinary tourist and was accomplished with minimal promotional activity. Results showed that culinary tourists were 55-64 years old, approximately 10 years older than the generic tourist; were more highly educated and more affluent with annual average incomes of \$125,000, spent approximately twice as much as non-culinary tourists during their visits.

Understanding the impact of the economic value of tourism can often be felt when there is an unforeseen disaster or crisis such as the outbreak of SARS. The Canadian Tourism Commission (CTC) reported in July 2003 that SARS caused a drop in the Canadian GDP of 0.15% (\$1.5 billion), two-thirds of this drop was in Toronto where tourism receipts fell 8.9% or \$568.7 million. Policies and perceptions of policies can also impact the tourism economy as recently seen in a survey of US tourists who were not travelling to Canada, thinking a passport was required to cross the border.

In order to establish the specific measurements of the economic value of culinary tourism, rather than using the general tourism indicators, more research following the Wade and Martin surveys must be done.

Social and Cultural Value

Culinary tourism is a social activity that has an impact on both the social and cultural levels of community. In recent years chefs have been spending more time learning about food directly from the agricultural or farming communities, often called, "Field to Fork" or "Field to Table" activities. Renowned Ontario Chef, Michael Stadlander organized the "Chefs Congress" - an annual event for chefs to meet food producers to help create a stronger bridge between the chef and the grower or producer. Although these relationships seem obvious and beneficial, they are not easily made in both urban and rural settings. Issues with consistent supply, quality control, pricing integrity and seasonality present special challenges for both parties. Those who do demonstrate the strength of community partnerships often influences the success of a tourism destination.

Culinary tourism in many ways celebrates what is local and what happens locally: the unique agricultural products/ingredients, growing and harvesting seasons, the tradition of the Saturday farmer's market, tasting events that showcase local foods and beverages. These events are often community-driven, and require the community to 'act as one'. In examples of culinary tourism around the world, community pride is recognized as one of the most important social outcomes of culinary tourism product development; where new partnerships are created and innovation abounds.

Introducing long-term culinary tourism strategies can also add a tremendous ability to 'educate' and build awareness for locals and tourists. In recent months, the media has reported results on obesity research in our culture generally attributed to over-processed foods, inactivity and the lack of knowledge about healthy diets. Culinary tourism can be used as a vehicle to build

awareness and to educate locals and tourists about the benefits of using local foods, organics, fresh produce, seasonal menus, cooking methods and techniques, gardening, and farming.

Environmental Value

Finally, the value creation of culinary tourism from an environmental perspective requires an integrated approach throughout the supply chain. Impacts to the environment include strains on land use, water systems, waste, and transportation infrastructure. An example of the positive influence of culinary tourism when it includes the importance of eating locally produced foods has become a movement in itself. The concept of a “food miles” metaphor is becoming more widely understood. A food mile is the distance food travels from where it is grown or raised to where it is ultimately purchased by the consumer or end-user. Food miles also can provide a relative indicator of the amount of energy or fuel used to transport food from farm to store, with lower food miles signalling lower transportation fuel usage and cost. If the energy source is fossil fuel, then the combustion of the fuel will emit greenhouse gases such as carbon dioxide (CO₂) into the atmosphere. Thus, fewer food miles would translate to lower greenhouse gas emissions - another environmental benefit from the purchase of local foods.

3. Popularity of Food and Beverage in Our Culture

The growth in popularity of food and beverage has increased over the past few years. Witness the number of food shows on television, cookbook sections in bookstores and libraries, culinary tour packages, taste classes, and festivals and events. Lifestyle magazines and newspapers send the message that foods of the world should be part of everyone’s diet and experience. Ingredients once thought to be exotic are now mainstream. Student enrollments in culinary schools and in tourism programs have more than doubled in the last decade including more and more mature students opting to become chefs or tour operators as a second career. Because the consumer is becoming a more educated and experienced traveller, there has been a move away from treating food and beverage simply as a necessary and routine part of travel to something that can be fully experienced as part of a destination. This can be seen by the growth of wine tours that include a dinner, private cooking schools where visitors not only learn about food and food techniques but also use the experience of food preparation for team building exercises in corporate Canada. By moving local food and beverages into the mainstream of the tourism market, the opportunity for culinary tourism will increase as a primary attraction or as an ‘add-on’ to other existing tourism activities.

KEY CULINARY TOURISM DRIVERS

There are many important reasons to consider culinary tourism as a strategic growth area of the economy. These include:

- Driving new revenues into the province by offering a different tourism product mix
- Adding a culinary tourism experience to an existing tourism product to increase value or to rejuvenate a tired destination
- Attracting high-value consumers who tend to become repeat visitors
- Attracting visitors to many unknown regions of Ontario that have rich culinary products - thereby enhancing a tourist's experience of Ontario
- Developing multiple ways to discover and view Ontario - through regional, cultural, and demographic differentiation. Tourists will have the opportunity to experience a more diverse Ontario
- Adding depth and appreciation of all that Ontario has to offer. Since learning and experience are key motivators for the culinary tourist, there is the opportunity to increase the knowledge and understanding of the Province
- Partnerships between Agriculture, Foodservice and Tourism looking for ways to increase attractions
- Regional economic developers, DMO's becoming more aware of the value of culinary tourism
- Global tourism includes a wealth of successful culinary tourism experiences driving consumers/tourists to have higher expectations for similar destinations and opportunities in Ontario

SITUATIONAL ANALYSIS AND SWOT REVIEW

Culinary Tourism Situational Analysis

Culinary tourism is growing around the world. Although data on the economic impact of culinary tourism is not available for Ontario, indicators such as revenues brought in by tourists in the food service sector, and case studies from other nations indicate that culinary tourism has a positive impact on the economy.

Tourism, according to the World Tourism Organization, is the world's largest export industry with annual receipts totalling \$523 billion (USD) generated by 691 million international visitor arrivals. A recent Canadian Foodservice and Restaurant Association statistic states that tourism accounts for 22% of all foodservice sales in Canada -- valued at 6.1 billion. The industry is significant, employing 1,070,700 Canadians. The Province of Ontario received 129.9 million person-visits in 2003, generating \$19.7 billion (CND) in revenues.



According to Statistics Canada's Canadian Travel Survey, 2002; and International Travel Survey 2002, tourism in Ontario is a significant economic sector and human activity. In terms of overall tourism activity, the sector:

- Generated 129.9 million person-visits in 2002, of which 50.2 million were overnight (the balance were same-day)
- 101.6 million person-visits were from Canada (about 90% from Ontario)
- 46% of overnight person-visits trips were for pleasure
- 37% were to visit friends and relatives, and
- 9% were for business

Tourism is not considered to be an industry by economists, rather it is a collection of diverse industries serving the needs of visitors (one can more accurately describe tourism as an economic sector). If one considers those industries that derive a significant portion of their demand from visitors during the course of tourism trips, tourism industries can be categorized as accommodation, amusement and recreation services, food and beverage service, transportation, and travel services (such as tour operators and travel agencies). The following table provides an estimate of the number of incorporated establishments in each of these sectors (it should be noted that there are many small, unincorporated, or single-proprietor enterprises that exists in these sectors). Incorporated tourism enterprises account for nearly 13% of all incorporated enterprises in the Province.

Industry	Number of Incorporated Establishments
Accommodation	2,973
Amusement and recreational services	6,948
Food and beverage	22,432
Transportation	9,708
Travel services	1,747
Total	43,808 (12.5% of all enterprises)

Source: Statistics Canada, *Business Patterns*, June 2004

The Ministry of Tourism estimates that 198,700 jobs were supported by tourism-related enterprises in 2003 and that another 46,000 jobs indirectly depend on tourism. The Ministry also notes that tourism is the Province's largest employer of youth and the largest seasonal employer.

The tourism sector is the seventh largest foreign exchange earner in the Province. Total revenues were \$19.7 billion in 2003, according to estimates by MTOUR, generating \$10.6 billion in the Provincial GDP. The Ministry notes this contribution is larger than agriculture, forestry, commercial fishing/hunting, and mining combined. Tourism also generates substantial government revenues through various taxes and fees - a total of \$5.3 billion at all levels of government, of which \$2.2 billion were Provincial.

The growing diversity of the Ontario market place both in products and in demographics in urban and rural communities only adds to and enhances the attraction of Ontario as a destination for domestic and international travellers.

SWOT

While culinary tourism has emerged in Ontario as a potential growth strategy for the tourism market, it is important to note that the strengths of the province are offset by weaknesses; the opportunities that can be leveraged to accelerate the process are matched with a number of threats.

STRENGTHS

- Ontario is a recognised destination and tourism hub nationally and internationally
- Travel and Tourism infrastructure is in place
- Size and diversity of province bodes well to appeal to all kinds of tourist's expectations
- Agricultural sector includes over 200 products/ingredients
- Involved and informed Hospitality and Tourism stakeholders are passionate about culinary tourism
- Ontario has nationally and internationally recognized post secondary educational institutions that support the hospitality and tourism industry
- Ontario is a four season destination
- Ontario has a rich history and tremendous diversity
- Some Regions have an established track record, experience and leadership in culinary tourism
- Tourism is growing again after set backs caused by 9-11, SARS, BSE and global conflicts
- Culinary tourism products and destinations growing
- There are strong and existing economic developers, tourism affiliates and business operators already packaging tourism products
- Ontario has several gateways to the US markets representing millions of potential tourists

WEAKNESSES

- Lack of provincial culinary plan and organization
- Lack of market-ready culinary tourism products
- Lack of research and performance indicators, success measures
- Lack of education, training and formal channels of communication linking industry
- Lack of a culinary tourism marketing plan
- Lack of quality assurance of culinary tourism products
- Lack of rewards and recognition programs
- Lack of profile of culinary tourism
- Lack of partnerships and communications within supply chain
- Lack of funding mechanisms to support projects and initiatives

OPPORTUNITIES

- Ontario could be recognized as a branded culinary tourism destination
- Culinary tourism could contribute to increased tourism spending and job creation
- Culinary tourists will come to a region primarily because of the culinary tourism opportunities provided by the region – strengthens the value proposition
- Create strong food/beverage producer – culinary professional networks
- Culinary tourism products designed and packaged to promote increased length of stay and additional value for tourists
- Visits to regions occur year-round - minimum of seasonal variation
- The products used and provided by culinary tourism service providers will be produced locally increasing local economies and creating new jobs
- Profits from culinary tourism will be re-invested in community
- Services and amenities for locals will improve
- Strengthened regional brands build strong provincial brand
- Culinary tourism is part of every traveller's experience of Ontario
- Culinary tourism increases regional and community pride
- Ontario is a leader in developing: best practices, benchmark studies, culinary tourism research, quality standards, performance measures

THREATS

- Continued fragmentation of industry pursuing culinary tourism growth – pockets of success restricted to regions
- Increased level of competition from other provinces and international destinations who are working within a provincial/state strategy and plan
- "Do nothing and see what happens" attitude by industry and government
- Lack of performance measures and economic indicators need to provide ROI data for investment and business development
- Complexity of culinary tourism may deter new product development
- Culinary tourism is viewed as the 'flavour of the month' by Ministry and industry making priorities shift to other projects
- Lack of funding will diminish focus - momentum and interest shown by industry will be lost

PROFILES OF A CULINARY TOURIST



PROFILES OF A CULINARY TOURIST

The range of culinary tourism experiences is broad, producing significant differences among the profiles of tourists engaged in each experience. Many existing studies have purported to describe culinary tourists by looking at only one type of experience – such as visits to wineries or have used a definition of culinary tourism that fails to capture the essence of the entire experience comparable to a more holistic definition. Currently, the best source available for profiling the Canadian culinary tourist is the TAMS (Travel Activities and Motivations Survey) dataset report. Among the questions about respondents’ participation in activities during trips within the two years prior to the TAMS interviews were questions about the incidence (yes/no) of participation in the following food and wine activities:

- Visiting farmers’ fairs or markets
- Visiting pick-your-own farms/participating in harvesting
- Shopping for gourmet foods in retail stores or farms
- Dining in restaurants with regional or local cooking
- Dining in internationally-acclaimed restaurants
- Touring a region’s wineries where one stays one or more nights
- Going to wineries for day visits and tasting
- Staying at a cooking school or at a wine-tasting school
- Staying at a gourmet restaurant with accommodation on the premises

A secondary analysis of the culinary questions in TAMS was conducted (Stephen Smith and Elena Ignatov. 2004. “Segmenting Canadian Culinary Tourists”) and the results provide insights into the diversity of the culinary tourism market in Canada. This analysis was based on three market segments: food tourists, wine tourists, and food and wine tourists, each defined in terms of distinctive activities participated in at least once during trips made in the two years preceding the survey. The following table presents the operational definitions of each segment.

Definition of Food, Wine, and Food and Wine Segments

Segment	Distinguishing Activities	
Food tourists	At least one activity in each of the following two groups of food activities and no wine-related activity:	
	•Visit farmers’ fairs or markets •Shop gourmet foods in retail stores or farms •Visit pick-your-own farm operations	•Dine at restaurants featuring local or regional cuisine •Dine at internationally acclaimed restaurants •Stay at a cooking school •Stay at a gourmet restaurant with accommodation on the premises

Wine tourists	At least one of the following wine-related activities but no food-related activity: <ul style="list-style-type: none"> •Touring a region's wineries with a stay of one or more nights •Visiting wineries on a day-trip for a wine tasting •Staying at a wine tasting school
Food and wine tourists	Participated in at least one activity in both food-related categories plus at least one wine-related activity

Profiles of each segment were then developed. These profiles describe demographics, psychographics, trip characteristics, and media habits. The next table summarizes some of the distinctive characteristics of each segment.

Distinctive Characteristics of Food, Wine, and Food and Wine Tourists

Segment	Distinctive Characteristics
Food tourists	<ul style="list-style-type: none"> •More likely to be female (than the two other segments) •More likely to have lower levels of education •More likely to have lower incomes •Trips more likely to be taken with spouse and children •Generally take fewer trips, stay with family, but engage in more activities than wine tourists but fewer than wine and food tourists •Rely on word-of-mouth and past experience for travel information
Wine tourists	<ul style="list-style-type: none"> •Generally equal proportions of females and males •More likely to have higher levels of education than food tourists, but lower than food and wine tourists •More likely to have higher incomes than food tourists, but lower than food and wine tourists •Generally take more trips than food tourists and less likely to visit family •Engage in relatively fewer activities on trips than two other segments •Sources of information include word-of-mouth, travel agents, weekend editions of newspapers, Internet
Food and wine tourists	<ul style="list-style-type: none"> •More likely to be male •More likely to have the highest levels of education •More likely to have highest levels of incomes •Most likely to travel, especially as a couple, and to stay at hotels, resorts, country inns •Highest levels of reported activity on trips, including shopping, reading, going to movies, going to farmers' markets, attending theatre, visiting art galleries, engaging in outdoor sports •Most likely to own a cottage •Uses the widest ranges of sources of information (travel agents, CAA, travel information offices, various print media, and airline reservation systems) but less likely to use Internet than the other two groups. However, when they do use the Internet, they are more likely to book on-line than the other two groups.

SUCCESS CRITERIA FOR EMERGING CULINARY TOURISM DESTINATIONS

Based on the proposed definition for culinary tourism and the literature review of successful culinary tourism regions, a list of success criteria has been created to help identify emerging culinary tourism destinations in Ontario. Limited similarities on a micro-level make it difficult to compare regions, and the distinction between emerging and established destinations is vague and imprecise. For example, Niagara is the most established culinary region in Ontario, and has long been recognized for its wine industry as well as its tender fruit production. However, on the international level, Niagara is only an emerging region. A culinary strategy has been developed for Niagara Region to guide its continuing development as a culinary destination. Niagara is also a gateway for tourists from the United States with attractions such as Niagara Falls, the two Casinos, theatres, golf courses, and other tourism-related activities. Because the Niagara Region draws more than 15 million visitors per year, there is a great likelihood of untapped potential for expanded culinary tourism in the region, given further product development and promotion.

Prince Edward County is a newer culinary tourism region. Like Niagara, the region has completed a culinary tourism strategy and could be considered beyond the phase, 'emerging', based on the current marketing of existing culinary tourism products. Prince Edward County, also a producer of wines, ciders, fruit beverages, and agricultural products has created a Taste Trail to promote Prince Edward County as a region.

Examples of regions in Ontario that are truly at the beginning stages of development include Muskoka, with its Taste Muskoka strategy and recently completed regional inventory. Ottawa – Kingston corridor is another emerging area or region – the development of the Rideau Cultural Heritage Corridor to market the Rideau's heritage, arts, cuisine, and natural history experiences. Le Foire Gourmande is a Quebec/Ontario food festival centred in Ville Marie on Lake Temiskaming, in Quebec, that has attracted over 15,000 visitors during 2004. Although it is not located in Ontario, it is a shared cross-provincial food festival. All of these regions would be classified as 'emerging' when compared to Niagara and Prince Edward County. Manitoulin Island is an emerging region for food production and processing. Unlike other Ontario 'emerging' regions, Manitoulin food producers have begun differentiating themselves by creating a Manitoulin brand that will apply to all products grown or produced on the island. It is not a culinary tourism destination per se but a good example of community packaging for the industry and tourists.

There are dozens of examples of communities across Ontario that have created food festivals, 'Taste' events and packaged food and tourism experiences; they may not call it 'culinary tourism' but they may call it a fundraiser for a community cause, a seasonal celebration or a shin-dig for local residents. These communities could easily become part of the 'emerging' culinary tourism destination' category by simply re-packaging these activities and marketing them for tourists.

One of the most important critical success factors for emerging culinary tourism destinations is the creation of an inventory within each region of the province. Understanding what is available in a particular area is not only fundamental to building a successful plan but foundational to

establishing packaged products. Based on the review of culinary tourism destinations in a number of parts of the world, it is possible to identify criteria that appears to be necessary (although not sufficient) for a region to emerge as a culinary tourism destination.

Successful Emerging Regions have:

1. Leadership

There are many different strategies that a region can follow, but most of the regions studied, emphasised the importance of leadership. Where there is no leadership, there are fewer regional success stories. Leadership articulates the vision to ensure practical support by key industry stakeholders. The leader often directs the execution of the culinary tourism strategy, acts as the conduit for communication among stakeholders and partners, and provides links to other culinary tourism initiatives on local, provincial, national, and international levels.

Individuals and associations who have taken on leadership roles generally have created their own local or regional culinary tourism strategy and action plan. These individuals and associations have built teams and working committees consisting of individuals and organizations who work on specific parts of the strategy and plan.

2. Market-ready or near-market-ready culinary products and resources

Not surprisingly, a critical mass of market-ready (or near market-ready) culinary tourism or tourism-related products and activities is imperative. However, there currently are no provincial guidelines or standards for assessing culinary tourism products. The CTC has developed a general workbook entitled, "How-to Guide: Develop a Culinary Tourism Product", which offers some suggestions for types of products and activities needed to ensure success. The checklist developed by the CTC, although useful, needs to be supplemented by a work plan and a product development roadmap to guide the development and marketing of culinary tourism products.

Being 'market-ready' requires an assessment of infrastructure, quality standards, and service issues. The review of infrastructure includes ensuring parking, public washrooms, signage, and, health and safety requirements are at a level that supports the competitiveness of the destination. Service issues include hours of operation, public access, access for travellers with disabilities, visitor information centres and, of course, the quality of service provided by front-line personnel in all tourism-related establishments. Anticipating customer needs with the right product mix, delivering a high quality customer experience with service excellence, and providing interpretation and information about the experience or destination are just some of the requirements to be market-ready.

3. An integrated strategy

Destinations with activities, attractions, and tourism services that complement culinary tourism products are more successful than those destinations attempting to promote a culinary tourism product in isolation. Successful culinary tourism destinations ensure that services such as accommodation, service stations, shopping, and information services are

both readily available and operated or promoted in a way that helps support culinary tourism activities. The development of culinary tourism should become part of the over-arching tourism strategy of a region, the agricultural or rural strategy, the educational strategy, and the job creation strategy. Successful regions include culinary tourism in their national or regional 'Food Plans' (Australia and New Zealand) and look for opportunities to align funds that support more than one strategy (British Columbia's Agriculture Ministry has a funding pot that supports funding applications for Agriculture, Foodservice and Culinary Tourism destinations).

4. Partnership and Community-based collaboration

Successful culinary regions are characterized by effective partnerships among businesses, government agencies of all levels, tourism associations, and marketing groups. This 'all-for-one and one-for-all' approach increases the likelihood of success. A sense of shared responsibility and of shared benefits promotes the creation of partnerships and can encourage other individuals and groups to engage. The development and promotion of culinary tourism should be approached in a business-like fashion: with strong leadership, market-ready products, and understanding market demands. Relationships among stakeholders must involve collaboration, trust, a sense of shared goals, and strong business acumen. Creating a business plan, market strategy and communications plan for a culinary tourism region requires time, effort, and investment. Successful regions select partners and create working groups carefully in an effort to attract those members with the best skill sets, competencies, and behaviours. A shared vision and a formalized communications network to support partners is absolute. The Province of Quebec models collaboration and partnerships as seen with their Les Tables des Concertation – a unique partnership between regions and producers encouraging education, promotion and a strong community network.

5. Financial support and performance measures

Most successful culinary tourism regions and destinations have long-term financial plans. Whether the funding comes from government or the private sector, it is critical that the investment is long term. Most culinary tourism products require a few years to become established and require a few cycles of activity before they can be successful.

Moreover, as with the financial contributions from sponsors and investors in other tourism ventures, funders expect to see empirical measures of success. An important strategy for success is to link the measurements to some sort of financial picture: revenues, additional spending per visit, increased person-trips, advanced bookings or number of overnight stays.

A balanced scorecard approach has been advocated in a number of culinary tourism plans. This is sometimes referred to as the "triple bottom line" – economic, environmental, and social impacts. This approach requires, of course, that government views the outcomes of culinary tourism not just in terms of economic

success of a destination but also the broader social and environmental aspects of quality of life in the region. The broader view of culinary tourism will include recognition of the contributions of culinary tourism to supporting agricultural diversity, food security, sustainable community development, community pride, and enhanced environmental protection.

6. Destinations with good access from key origin markets

While a strong brand image and effective marketing communications are essential for the development of a successful culinary tourism destination, good access to a large population base is very helpful. This is especially true for emerging culinary destinations that do not yet have the high profile to attract visitors from great distances (as in the case with New Orleans or the Tuscany Region of Italy). Access, especially for emerging culinary regions, will typically be highway-based, although access by air and/or water might be relevant for some destinations.

A culinary tourism destination cannot often relocate itself or even have much influence over the development of the highway network serving it and therefore destination regions should work to ensure clear and effective signage. Obtaining Tourism Oriented Directional (TOD) signage on provincial highways is an important step, as well as signs on regional roads and markers are needed to help visitors. The Area Profile Sign is located on the highway at the right of way fence line. The sign is available to certain tourism groups to promote a defined tourism marketing theme or area. It is not directional and has no trailblazers.

7. Sufficient market intelligence

Successful culinary regions know their markets and understand their customers. Gathering information about the market and understanding the behaviours of the traveller can help culinary tourism business entrepreneurs as well as community planners make decisions that will help their businesses and communities succeed. Having reasonable proximity to a population-base that wants your product is not sufficient. It is necessary to understand what those wants are, and how to effectively communicate with that market. This is especially important for rural communities that depend on the willingness of potential visitors to travel greater distances, usually over rural roads.

Different segments will look for different types of products. Some will be drawn by community festivals; others by the opportunity to follow a taste trail; others by the possibility of combining a get-away at a comfortable inn or resort with fine dining; still others by desire to have access to high quality, locally produced, organic products. Understanding the various motivations and desires of potential customers is needed in order to develop a range of products and marketing initiatives to appeal to those segments

8. Culinary tourism resources distinctive to the region

The essence of culinary tourism is an emphasis on local products or local styles

of cuisine that make a destination or culinary tourism experience unique. These culinary resources can become a draw to tourists and can convey important information about the culture of the region. To this end, food and beverage products that are produced locally should be branded as such. In many cases where culinary tourism destinations are located in rural or agricultural surroundings there is an opportunity to expand the culinary tourism experience by incorporating information about the influence of agriculture to this experience. In urban centres where



proximity to agricultural land and resources is not available, successful regions have created environments or marketing literature that brings the essence



of locally produced foods and beverages to the city through markets, festivals, creative menus, and stories told to the visitor. The authenticity of the experience helps make the experience distinct whether it is in urban or rural Ontario.



9. Destination with multiple culinary tourism experiences

A range of culinary tourism experiences, including, restaurants, farmers markets, tours, local food producers (including breweries and wineries), festival, and events all add the drawing power of a destination. Every successful culinary tourism destination examined featured multiple opportunities from which the tourist could chose. Moreover, these various attractions and experiences reinforced the entire brand strategy of the entire destination and often complemented each other. For example, restaurants featuring local produce and wines also presented the visitor with information about visiting these producers. In some cases, recipe books might be offered featuring recipes by local chefs who use local ingredients and provide information about where these producers can be located. Culinary stories and local history can be woven into food or beverage trails, incorporated into local museums, and highlighted on maps. Co-marketing and partnership strategies provide the visitor with more options and support the likelihood that visitors will come to your region and stay longer.

10. An effective destination marketing organization (DMO)

All successful culinary regions examined have a DMO that recognizes and values the role of culinary tourism as part of the attraction of a destination. This recognition goes beyond providing listings of restaurants, but also features culinary stories in marketing and promotional activities conducted by the DMO. The actual marketing activities of the DMO will vary by region, but most will include an active consumer marketing program, possibly a group tour program, a media relations program and media FAM tour, and the provision of collateral marketing material such as story suggestions. Creating a media kit including digital images, contact names, and maps to culinary tourism destinations are invaluable tools. Culinary tourism can be an exciting opportunity for destinations that have a significant meetings, conventions, and incentive travel products. The DMO can play a significant role building and promoting partnerships between tour operators and culinary tourism services/product suppliers.

While the importance of an effective DMO in promoting the development of a culinary tourism destination can not be understated, there were few regional promotional materials found that clearly identify culinary tourism as part of the regions value proposition. Marketing brochures gathered from across the province often featured food, dining, cooking classes, and festivals as isolated niche activities. There is a need to provide a more integrated approach to the regional culinary experience.



STRATEGY / CRITICAL SUCCESS FACTORS

THE ONTARIO CULINARY TOURISM STRATEGIES

The following strategies reflect the input of the industry stakeholders and align with a new vision and mission for culinary tourism in Ontario. The strategies are interdependent – meaning they cannot exist and be successful without the other. For example, without the “Leadership, Partnerships and Market Intelligence” in place, it is highly unlikely that “Enhanced Communication” will happen or be fully realized.

Culinary Tourism Strategies

- Establish Strong Leadership and Industry Linkages
- Strengthen and Enhance Communication
- Encourage Research, Education and Training
- Support Established and Promote New Culinary Tourism Products and Development
- Establish Mechanisms for Funding and Support

Strategy 1. Establish Strong Leadership and Industry Linkages

The need for leadership to champion the implementation of the culinary tourism strategy was a clear message that emerged from the literature review and stakeholder interviews. Those interviewed strongly expressed the hope that the strategy would not simply be an “information piece” but would be directive and inspire action. One of the specific suggestions made by stakeholders was to create an “Office of Culinary Tourism” (this term is being used for convenience only - the actual name should be selected by a Steering Committee). Leadership can take the form of an individual, steering committee, an organization, or a group of partners representing industry. Central to this role is to lead, guide, communicate, educate and to open doors and advocate on behalf of the stakeholders.

Strategy 2. Strengthen and Enhance Communication

Good communication practices are very important during all phases of development and implementation. The successful culinary tourism associations and regions have created communication plans directed to serve industry: websites, newsletters, a contact person and telephone number, access to research and information and, ongoing events to keep industry stakeholders informed.

Good communication will accelerate building awareness in industry and engaging more people to participate on working committees.

Strategy 3. Encourage Research, Education and Training

Research, education, and training are prerequisites to building and implementing a strong provincial plan for culinary tourism. Industry stakeholders ranked the need for research, education, and training as a priority. Stakeholders viewed research, education, and training as important ways to create a sustainable communication plan for industry and to be critical in delivering many pieces of the action plan. For example, research is needed to create quality assurance programs, performance measures, gathering marketing intelligence and continuously finding research done nationally and internationally and passing it on to stakeholders. Even though industry stakeholders lumped research, education and training together, the 10-year goals and objectives separate research from education and training, as two separate activities – the research component being shared between university researchers and government researchers and the education and training strategically placed with an association with a provincial mandate to serve colleges who provide training to the industry – such as Heads of Hospitality and Tourism in Ontario (HOHTO).

Strategy 4. Support Established and Promote New Culinary Tourism Products and Development

The availability of market-ready products in Ontario is paramount to the success of marketing Ontario as a culinary tourism destination. Working with OTMP as a strategic partner will help regions and individual businesses develop or enhance their tourism and/or culinary products. Understanding the product mix of a culinary tourism destination and developing quality standards around the products will ensure the market-readiness of the experience. If a region feels that their culinary tourism products are market-ready and meet agreed upon quality standards (yet to be developed) then these products need to be supported and highlighted to other stakeholders as benchmarks or for industry to learn some best practices. The development of new products will need a comprehensive plan including an investment strategy and a helpful guide to support innovation.

Strategy 5. Establish Mechanisms for Funding and Support

Mechanisms for funding (seed money, grants and/or loans) culinary tourism development in regions and communities will be required to support regional culinary tourism strategies and plans or to support inventory-taking, assessment of current culinary tourism products and new culinary tourism product development. Funding is needed to implement all of the strategies laid out in this report: communications, research, product development, marketing, education, and training. However, government alone cannot be expected to provide all of the necessary levels of funding – there must be industry investments made. Many culinary tourism associations and strategic groups around the world have created funding models that either are a blended approach of public and private sector financing, or are funded entirely by industry. More research should be done to scan possible federal, provincial, and local available funds in addition to looking at some of the organizational funding models found in Australia, New Zealand, Oregon, Nova Scotia and British Columbia.

10 YEAR GOALS AND OBJECTIVES



10 YEAR GOALS AND OBJECTIVES

THE 10-YEAR GOALS AND OBJECTIVES FOR CULINARY TOURISM IN ONTARIO

The following 10-year goals and objectives address the current issues facing Ontario, followed by specific action items that need to be undertaken to achieve success. As this is an industry plan that will be supported by government and executed by stakeholders, it is imperative to organize, collaborate, and communicate effectively. This is a time for leadership from regions across the province and throughout the supply chain. It will require investments of time and money, research and training, innovation and product development, planning and marketing. These ambitious goals can be achieved by Ontario. There are model organizations in Ontario, who have started similar strategies and action plans over the past decade and are now reaping the rewards of their leadership and organizations: The Wine Council of Ontario, SPAS Ontario, and most recently, the Small Crafty Brewers of Ontario. These are three examples of industry-led, government-supported organizations that have achieved success. It is highly recommended that these three organizations participate in the culinary tourism Steering or Working committees.



GOALS AND OBJECTIVES

1. LEADERSHIP AND ORGANIZATION

Current Issue:

There is a need to create an organization and leadership committee charged with the responsibility of the provincial culinary tourism strategy and action plan.

- No organization currently has the province-wide mandate to advocate the development of culinary tourism or to oversee the implementation of the strategy.
- Culinary tourism leadership in the regions of Ontario is fragmented. Regions that do have a basic organizational structure promoting culinary tourism, lack the resources needed to ensure the development and sustainability of culinary tourism.
- There are few formal or established linkages among the regions, industry sectors and individual operators focused on culinary tourism

GOAL:

Establish a provincial organization to support the implementation of the strategy and action plan.

Objectives:

- A provincial culinary tourism organization/representative will support the implementation of the culinary tourism strategy and action plan and will provide 'one voice' at a provincial level where information can flow to regions and stakeholders within Ontario and to national and international organizations.
- To work closely with regions and industry associations who support the hospitality and tourism industry and liaise with those individuals, regions and associations who influence policy decisions that may impact culinary tourism
- To centralize information and make investment recommendations that will benefit stakeholders across the province
- To mobilize and direct working committees supporting the culinary tourism strategy and implementation process

Planning Approach:

Ongoing - with short- to medium-term implementation.

Industry-led and resourced: Steering Committee and working committees

Recognized by Ministry: projects and initiatives supported by government

Action:

1.1 Call a meeting of industry leaders and the Ministry of Tourism to review the strategy and outline steps to create an action plan.

- Invite senior industry leaders representative of the stakeholder group, regional

culinary tourism groups and government to a meeting. This meeting should be at the invitation of the Deputy Minister of Tourism and Recreation. Review 2005 Strategy and Action Plan.

- Produce a framework for the establishment of an industry-lead Steering Committee
- Establish Working Committee 'leaders' representing stakeholders

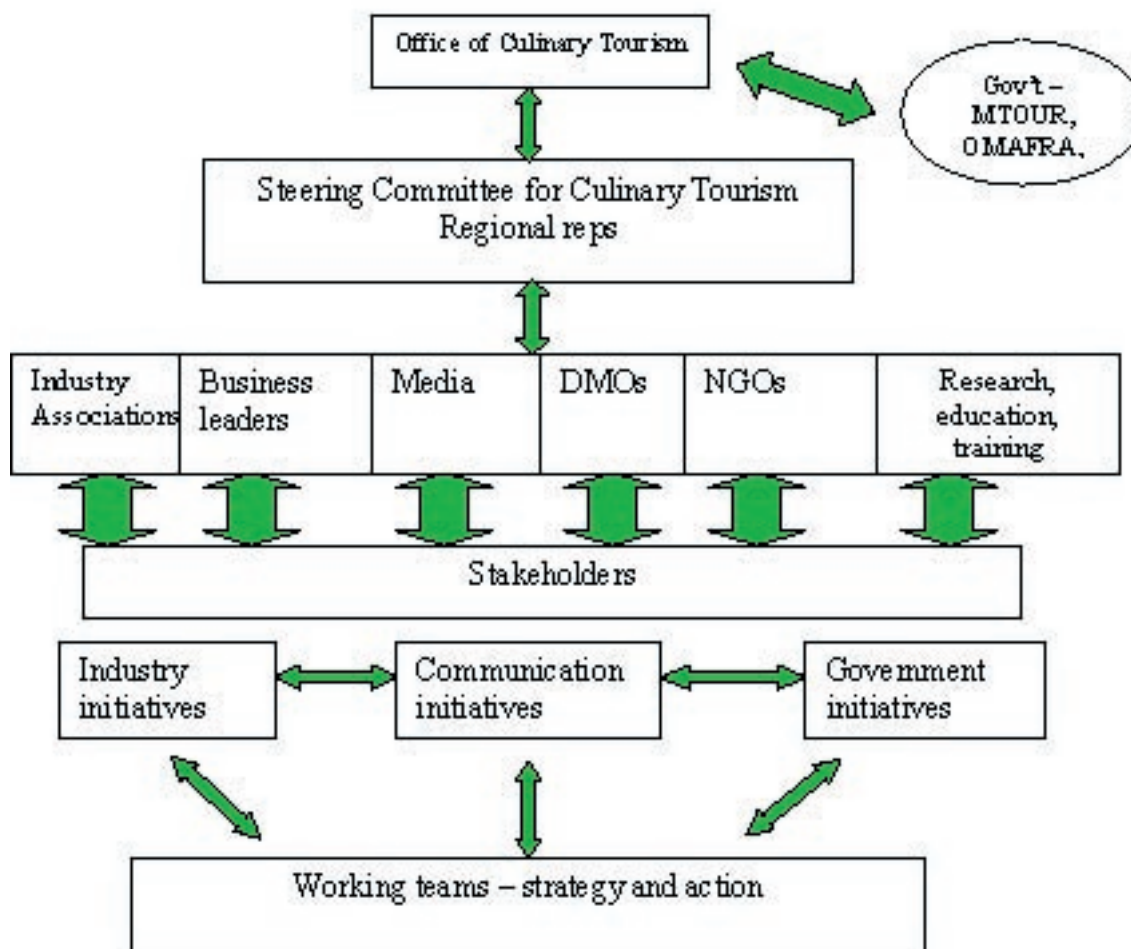
1.2 Steering Committee to create an 'office' of culinary tourism

- Solicit support from stakeholders to house an 'office' of culinary tourism- including in-kind contribution toward overhead and basic office needs.
- Prioritize recommendations and action plan
- Prepare a three-year business plan based on the strategy, action plan
- Hire an executive director on a contract basis. This executive director would have the following characteristics:
 - Demonstrated success as an industry specialist or business advisor working with government and private sectors - who has a reputation for delivering results, is part of an established network, institution or business
 - Experience working with individual businesses, community-based organizations, non-profit association, boards, and committees
 - Extensive knowledge of culinary tourism and the issues and factors surrounding the various groups in the supply chain

Overall deliverables of the 'office' of culinary tourism

- Develop an action plan for the implementation of the culinary tourism strategy
- Create awareness in communities and regions, media relations, and presentations to interested associations, conferences, and groups
- Gather and disseminate information to stakeholders (national and international reports, research, findings and strategies)
- Find an industry sponsor or a funding mechanism to support the office
- Represent Ontario on a national level to other culinary tourism organizations
- Support working committees
- Assist with brand development and develop branding strategies for culinary tourism in Ontario
- Work with organization already performing research (CTC and Ontario Research Branches) to influence research that will support stakeholder needs. Identify potential sources of research funding
- Advocate, on behalf of stakeholders, on issues such as provincial culinary tourism standards, rating systems, quality assessment, and other provincial initiatives that would impact stakeholders

Suggested provincial organizational infrastructure

**1.3 Develop Working Committees addressing each of the 10 Goals and Objectives**

- Launch a “call to action” for industry volunteers to participate on working committees
- Review goals and objectives with working committees and have each committee prioritize action plan and deliverables
- Create a network for communication among working committee members and the Steering Committee

1.4 Align activities with regions and communities already using the Premier Ranked Tourism Destination Framework

- Contact regions that have used the Premier Ranked Tourism Destination Framework to identify opportunities to use this framework to create culinary tourism inventories and activities in each region
- Develop a culinary tourism business model similar to the Premier Ranked Tourism

Destination plan and workbook to assess culinary tourism readiness, training modules for culinary tourism implementation and economic return on investment evaluations. Make this available to all interested regions and communities

1.5 Establish direct links to other provincial networks

- Identify and contact stakeholder groups representing similar provincial mandates or mandates that may benefit from culinary tourism.
- Contact provincial leaders from industry associations, business leaders from industry, media, destination and regional marketing organizations, OTMPC, tourism staff from MTOUR, OMAF, Economic Development, as well as research, education and training institutes (both private and public).
- Notify industry associations of the establishment of the culinary tourism office and distribute copies of the Strategy and Action Plan with the invitation for feedback and involvement on working committees

1.6 Establish links to the links of the culinary tourism supply chain

- Contact representatives from industry associations, food distributors, growers, processors, tour operators, farmers' markets, festival and event organizers, and other associations supporting the culinary tourism supply chain. Speak at as many association events as possible

2. MARKET-READY CULINARY TOURISM PRODUCTS

Current Issue:

There is a need to review existing culinary tourism products and to develop a plan for new product development that meets a consistent quality standard.

- No provincial culinary tourism product inventory exists
- No quality standards have been created
- There is little information, frameworks or models helping industry create new products or supporting the enhancement of existing products
- There is little research based on best practices or benchmark studies in culinary tourism destinations and products

GOAL:

Develop market-ready regional culinary tourism products and partnerships

Objectives:

- Develop a provincial culinary tourism marketing plan in conjunction with regional plans to focus on new, and enhancing existing, culinary tourism products. Encourage partnerships with existing culinary tourism alliances to build efficiencies of scale by eliminating redundancy of activities and investments.
- Regions, MTOUR and other ministry partners to identify existing products and support the development of new regional culinary tourism products and partnerships
- Gather information on existing (successful and unsuccessful) culinary tourism destinations and products
- Build a stronger value proposition for culinary tourism in Ontario
- Integrate culinary tourism strategy with Heritage, Agriculture, Regional Economic Development and destination marketing strategies.

Planning Approach:

Ongoing with short-term implementation: industry-led, supported by the Ministry and other government ministries and agencies

Actions:

2.1 Establish a Working Committee responsible for Culinary Tourism Product Development

- Work with MTOUR, OTMPC and Regions to create an approach to product development
- Gather existing regional inventories of culinary tourism products in Ontario
- Create a product development model and plan
- Work with other working committees: Research and Quality Assurance to establish guidelines and approach to the development of product quality standards

2.2 Outreach to Regions and Communities and National Organizations

- Identify culinary tourism alliances/committees currently working on regional marketing strategies and plans
- Create a repository for information, plans, best practices, success measures for product development

- Gather information from CTC about culinary tourism associations and organizations across Canada and around the world: get contact info
- Gather info from these contacts about their product development models, process and guides

2.3 Work with MTOUR and other Ministries and Government Agencies

- Create a presentation package for routing to other ministries under the signature of the Deputy Minister about culinary tourism – look for ways to integrate marketing strategy and plans into those of other ministries
- Prepare fact sheets that show the linkages of culinary tourism to other ministries
- Promote closer communication on culinary tourism issues between the Ministry of Tourism, Heritage, Agriculture and Economic Development
- Gather inventories of products from other ministries (Agriculture, Heritage, “Recreation”) and federal government departments

2.4 Create a Culinary Tourism Partnership Plan

- Identify types of partners associated with successful product mixes supporting culinary tourism – representative of urban and rural destinations as well as an assortment of product packages throughout Ontario
- Collect or identify research on partnership strategies that are successful in culinary tourism – identify business types and value propositions for each business. Create a culinary tourism partnership profile
- Identify examples of events that promote partnerships among chefs and culinary professionals, growers, processors, tour operators and destinations



CULINARY EXPERIENCES



3. RESEARCH AND PERFORMANCE INDICATORS

Current Issue:

There is a need to invest in research that supports all of the action plans and strategies for culinary tourism in Ontario. Performance indicators have been identified as key to industry stakeholders in their business planning and understanding the 'return on investment' equation for culinary tourism or how to measure success.

- Lack of research done in Ontario focussed on cuisine or culinary tourism
- Absence of performance indicators measuring culinary tourism in Ontario
- No performance indicators or success measures available for businesses in culinary tourism or businesses interested in getting into culinary tourism

GOAL:

Invest in research and develop performance indicators

Objectives:

Investments in culinary tourism research projects that will directly benefit the province and the industry stakeholders by supporting the development of performance indicators that can be used by industry to develop culinary tourism products.

Planning Approach:

Medium-term implementation

Educational institutions to lead and work with government researcher

Government and industry to support and help fund

Actions:

3.1 Support market research enhancements and the gathering of market intelligence

- Work with researchers currently conducting tourism research - incorporate specific questions and focus to support culinary tourism (such as the next iteration of TAMS, likely to be launched in 2006) activities, motivations and results
- Develop a provincial inventory of culinary tourism resources - based on input from regions, industry sectors and enterprises and organizations within the culinary tourism supply chain. An inventory will help in the development of a provincial culinary tourism market strategy, communication plan, the creation of a unique value proposition, and identification of potential new culinary tourism products, experiences, and brands.
- Categories for a centralized provincial culinary tourism inventory database include:
- Operators: Culinary tourism operators, tour agents/operators, events/festivals, restaurants, accommodation, entertainment, recreation, food and beverage retailers, campgrounds, farm markets, wineries, breweries, cideries. Include other tourism operators such as those classified in arts and culture, museums and historical venues.

- Suppliers: Producers, processors and growers
- Publications, information centres, and media: Any reporting sources that specialize in travel, food, and beverage. Include marketing and tourism information sources such as websites, brochures, and archived news items.
- Associations: Chambers of Commerce, business associations, wine clubs, culinary associations.
- Talent: Business owners/operators, chefs, cooks, specialised media, event planners and those in the business of preparing food and beverages for visitor.
- Trainers/educators: Colleges, universities, high schools, private learning institutions, trainers and those who specialize in customer service training, travel and tourism, hospitality, culinary arts, recreation and leisure.
- Food and beverage products: Food and beverage products that are grown produced or processed in each community or region.
- Government representatives: Federal, provincial, regional and local levels of governments including those who work in Tourism, Consumer Affairs, Economic Development, Agriculture, Arts and Culture.
- Marketers: Contacts with OTMPC and MTOUR, regional and destination marketing organizations.

3.2 Research communication

- Provide customized interpretation of data from existing surveys and research reports on culinary tourism for use by stakeholders. The information should be disseminated on the website, through industry presentations, workshops and a range of other communication vehicles.
- Build a knowledge repository – Culinary tourism research and reports should be accessible through a centralized repository. With the help of the researchers, information that is helpful to industry stakeholders can be highlighted and significant new acquisitions brought to the attention of industry. This repository should contain frequent updates and additions of research, market reports, focus group information, and best practices from regions and countries around the world.

3.3 Develop new research projects in concert with industry needs

- Work directly with researchers to identify research gaps and funding sources.
- Conduct research directly relevant to business operations
- Establish performance measures including quality standards, economic and social measures

Quality Standards:

Areas for which there is a need and industry support of provincial-level quality standards should be identified. These standards may include restaurant rating systems as well as criteria for certifying the origins of local ingredients. Measures related to the sustainable operation of food producers, especially farms, would help promote the overall readiness of culinary tourism in Ontario.

Economic Measures:

Here are some suggested actions to create economic measures:

- Using surveys of in-province and out-of-province (including rest of Canada and international) visitors to estimate the percent of these visitors who report (1) making a tourism trip for the primary purpose of engaging in culinary tourism expenditures and (2) for those who visited for other purposes, estimate the portion of their food and beverage expenditures (both from restaurants as well as from food retailers such as wineries). Using expenditure data for each group, apply the OTREIM model to estimate contributions to GDP, jobs created, and taxes generated by culinary tourism activities.
- Using OTREIM, assess the economic impact of (1) businesses for which culinary tourism is a major source of their revenues and (2) culinary tourism businesses making capital expansions
- Conduct business surveys in those regions that are recognized as culinary tourism regions (e.g., Niagara, Prince Edward County) to estimate the number and percent of firms involved in the culinary tourism sector - either as direct suppliers to visitors or as links in the culinary tourism supply chain. Track over time.
- Using a sample of typical restaurants - those who emphasize local/provincial ingredients and those who do not - calculate the total food-kilometres consumed as part of their purchasing on a seasonal basis. This should be repeated periodically using the same sample, if possible, to track trends over time.
- Conduct research on price elasticity of culinary tourism products to help assess impact of taxation level on demand for culinary products, including alcoholic beverages.
- Assess the contributions of the culinary sector to government revenues through all forms of taxes and fees.

Social Measures:

The four following suggestions might be best implemented through the development of an annual Ontario Culinary Survey, to be managed and funded jointly by MTOUR and OMAF. The survey would examine trends in the demand for local/provincial ingredients and food products and assessments of the quality of restaurants serving residents in their hometown

- Survey Ontario residents who say they seek out local ingredients when dining out at restaurants (both on non-tourism and tourism trips)
- Track assessment of quality of meals at local restaurants in comparison to restaurants elsewhere in Ontario and elsewhere in Canada. This should be a very

simple scale, along the lines already used in the ITS to ask about the quality of visitors' perceptions of Canadian tourism products: "not as good as", "as good as", "better than", "don't know"

- Estimate the percent of Ontario residents who say that "having the opportunity to enjoy healthy, well-prepared meals using local ingredients" is "very important", "somewhat important", "only slightly important", "not at all important" to my quality of life. Track over time
- Track percent of shoppers who seek out locally/provincially-grown ingredients - on a seasonal basis - from grocery stores

3.4 Business operation-related research

- Engage and encourage the human resource councils to share market labour research that may be of interest to industry stakeholders.
- Engage industry associations that conduct research on a provincial and national level to embrace research activities that pertain to culinary tourism.
- Develop financial and other business benchmarks to assist culinary tourism operations at various points along the supply chain to gauge their efficiency against industry norms.

4. EDUCATION AND TRAINING FOR INDUSTRY AND COLLEGES

Current Issue:

There is a lack of education, training and 'toolkits' available to industry – there are few college or university programs about culinary tourism in the province

GOAL:

Invest in education and training to develop programs and toolkits for industry

Objectives:

Post-secondary educational institutions need to plan to design, develop, and deliver culinary tourism programs and/or courses that are directed to undergraduates, mature students, industry stakeholders, and individual business operators in an effort to educate and familiarize students with culinary tourism.

Planning Approach:

Medium-term implementation

Educational institutions (Colleges/HOHTO) to lead and work with working committees,

Ministries and Steering committee

Government and industry to support and help fund.

Actions:

4.1 Working committee of colleges

- Work with an association such as HOHTO to form a working committee to structure a plan for education and training requirements for industry stakeholders and future students
- Review programs and course currently delivered
- Identify national or international programs and training best practices
- Identify key educational institutions, human resource organizations, and/or professional associations that are interested in developing and delivering culinary tourism programs
- Create a range of programs (with accreditation) and training aids/toolkits and communication (without accreditation); use a variety of course/program delivery strategies to increase access to learning
- New student opportunities will begin designing internship and externship opportunities with industry stakeholders and economic development offices throughout the province focused on culinary tourism

4.2 Educational Toolkits For Industry Stakeholders

- Put together a training and education plan that is aligned to other working committee training needs
- Sample stakeholder to assess proper delivery format for toolkits and educational programs
- Assess funding needs to run a pilot
- Run pilot and evaluate success

4.3 Program Rollouts and ministry approvals

- For programs funded by the Ministry – follow process for new program approvals
- For non-funded programs, start rollout of material

5. DEVELOP A CULINARY TOURISM MARKETING PLAN

Current Issue:

There is currently no marketing plan for culinary tourism in Ontario

GOAL:

By working with OTMP, the Ministry of Tourism and stakeholders, Ontario will have a marketing plan supporting culinary tourism

Objectives:

- Work directly with OTMP to work on a provincial marketing plan for culinary tourism
- Ensure the provincial culinary tourism marketing plan is representative of existing regional plans or, for those regions without a culinary tourism regional plan, provides direction for completing one

Planning Approach:

Short to medium term implementation
OTMP and Steering Committee to work together
OTMP/Industry/Ministry funded (projects)

Actions:

5.1 Regional Plans - Assessment

- Gather regional marketing plans where possible (Ontario and from any other provinces)
- Discuss with regional leaders the successes-to-date of these plans
- Define measurable outcomes of each plan

5.2 Identify Product Offerings

- Gather inventories from research committee and with help from other committees any information about existing culinary tourism products
- Create a database of existing products/destinations/services/partners/packages/prices
- Map out offerings as to where they are in Ontario
- Identify any inconsistencies in products and how they are marketed

5.3 Develop plans to support regions

- Prioritize regional plans and time tables
- Work with regions to help create plans (using models and templates to support)

5.4 Value Proposition for Culinary tourism in Ontario

- Create a provincial value proposition for culinary tourism. Not only does Ontario need to endorse a common vision for culinary tourism, it needs to produce a provincial value proposition

5.5 Work with operators, regions and communities who have or are completing the Premier-Ranked Tourism Destination Framework

- Gather inventories of marketing and tourism information from communities/regions who have completed their business plan for “Premier Ranked Tourism Destination”
- Assess whether committees working within this framework would benefit from including culinary tourism in their marketing plan.

5.6 Promote market-ready products in provincial communication or presentation material with a focus to:

- Encourage food service establishments in Provincial attractions to feature Ontario ingredients, products, and beverages with the eventual goal being to integration with the food supply chain.
- Strongly encourage festivals and events sponsored by the Province to feature Ontario ingredients, products, and beverages as part of their food services response to and recognition of provincial support.
- Work closely with OTMPC, DMOs and regional marketing organizations to add culinary experiences to the attractions featured in various destinations.
- Work with OTMPC to develop and deliver training materials for industry on how to market a culinary tourism destination.
- Promote the inclusion of food retail outlets featuring Ontario regional food products in the Provincial tourism information centres.

5.7 Develop marketing and promotional materials

- Assist regions with marketing and promotional materials – template
- Develop a provincial marketing and promotional piece for culinary tourism

5.8 Consider creating a food and wine writers’ festival

- Select international journalists to attend a food and wine writers’ event that highlights and demonstrates market-ready culinary tourism products. Successful models exist in Quebec and Australia, and have demonstrated how such festivals can quickly raise the profile of culinary tourism

6. DEVELOP QUALITY ASSURANCE

Current Issue:

There is a lack of quality assurance of culinary tourism products/destinations

GOAL:

To have a quality assurance plan and strategy for the province of Ontario that can be filtered down to regional quality assurance programs

Objectives:

- Quality standards must be put in place to support culinary tourism in Ontario
- Create standards for culinary tourism products that meet industry standards and acceptance
- Work directly with researchers to find benchmark studies and best practices
- Create a model to get industry buy-in

Planning Approach:

Medium-term implementation

Working committee made up of industry and consultants familiar with quality standards, ratings systems

Government and industry to support and help fund.

Actions:

6.1 **Create standards for culinary tourism products that can be used as guidelines for industry**

- Work directly with researchers to find benchmark programs and industry to get buy-in to the process

6.2 **Ratings System**

- Survey industry to see if there is interest in a ratings system to support culinary tourism products, culinary tourism destinations and/or restaurants
- Using research gathered for this report, assess the value verse the cost of implementing a ratings system
- Prepare recommendations and timing for implementation process
- Prepare costs of plan
- Submit to Ministry of Tourism as a project to be funded

7. AWARDS AND RECOGNITION FOR INDUSTRY

Current Issue:

There are no rewards or recognition attributed to culinary tourism in any of the industry awards programs

GOAL:

To create a series of awards for outstanding achievement in culinary tourism to recognise businesses, regions and partners who have invested time and money to produce outstanding destinations or products.

Objectives:

- Recognition program put in place through industry awards programs such as those given out by TIAC, OHI and MTOUR
- Promote operators, culinary professionals and those developing culinary tourism products that win awards
- Provide incentive to all operators, regions and industry stakeholders with criteria for an awards program

Planning Approach:

Short to Medium-term implementation

Working committee made up of industry and consultants familiar with Awards and Recognition programs

Government and industry to support and help fund.

Actions:

- 7.1 Working committee to create an awards and recognition plan**
- 7.2 Identify hospitality and tourism associations that provide awards to industry stakeholders**
- 7.3 Define criteria with associations**
- 7.4 Make recommendations for funds to support these awards**

8. BUILDING AWARENESS ABOUT CULINARY TOURISM

Current Issue:

There is limited awareness within stakeholders groups about culinary tourism

GOAL:

To create awareness of culinary tourism throughout the supply chain

Objectives:

- To build awareness about culinary tourism to all businesses in the supply chain
- To stimulate interest and to engage businesses to develop culinary tourism products and/or support their regions and communities
- Culinary tourism will provoke a sense of pride within community and within a wider tourism industry by fostering a greater understanding and appreciation of food and drink, cultural identity, heritage and talent that resides locally, regionally and on a provincial level.
- Ontario will be seen as an innovator in culinary tourism on a national and international stage
- The explicit use of culinary tourism in provincial marketing brochures will offer tourists an enriched experience of Ontario.

Planning Approach:

Short-term implementation

Working committee made up of regional field consultants (MTOUR), Education/training working committee, and any federal department with field consultants
Government and industry to support and help fund.

Actions:

8.1 Working committee to create awareness plan for industry stakeholders

- Identify contacts within the stakeholder groups and supply chain
- Identify an awareness plan and campaign
- Identify communication device, frequency and delivery technique
- Identify costs
- Identify success measures

8.2 Submit plan to Steering committee for funding suggestions

8.3 Create database of contact names for mailings or mass distribution

8.4 Begin distribution

9. STRENGTHEN PARTNERSHIPS AND IMPROVE COMMUNICATIONS WITH SUPPLY CHAIN

Current Issue:

There are few partnerships established to support a provincial culinary tourism strategy that are formalized and that support information flow to the supply chain

GOAL:

A fully networked supply chain that fosters partnerships and communication

Objectives:

- To increase and strengthen the number of partnerships within the culinary tourism supply chain
- To link to other working committees to reinforce communication to supply chain with a focus to build partnerships
- Create a feeling of 'association' with all interested supply chain businesses
- Assist in helping develop some partnership models for the supply chain

Planning Approach:

Short-term implementation

Working committee made up of supply chain associations, individual members

Government and industry to support and help fund.

Actions:

9.1 Working committee representing supply chain of culinary tourism to create a plan to help support the development of partnerships within the supply chain

- Identify key associations that support members of the supply chain
- Identify key contacts within the associations or, if there are no associations affiliated with that group, identify a key contact
- Contact and invite to a meeting
- Working with Steering Committee, look for opportunities to do a presentation to associations and members
- Identify success measures for presentations

9.2 Identify any partnership strategies observed through the associations that promote tourism packages or culinary tourism products and destinations

9.3 Create database of contact names for mailings or mass distribution

9.4 Work with organization accountable for bi-annual Culinary Tourism Symposium to use this partnership network as a targeted group for participation and on-going communication

9.5 Create a provincial culinary tourism brochure and website

- Design a specific electronic brochure for culinary tourism in Ontario
- Create an area within the Ministry of Tourism website that addresses culinary tourism – this website could be partitioned for industry and tourists. If this is not available, look to industry to sponsor a website

10. FUNDING MECHANISMS

Current Issue:

There are limited funding mechanisms in place to support the culinary tourism strategy and implementation of the action plan

- There are currently no specific funding resources available to researchers, operators, regions, and/or communities to support the development of culinary tourism activities.
- Funding for the implementation of the Ontario Culinary Tourism Strategy and action plan has not yet been committed

GOAL:

A funding structure and mechanism to access funds for culinary tourism projects that is both long-term and sufficient to address the priorities of stakeholders.

Objectives:

- To create a sustainable funding model supported by industry and government.
- Culinary tourism will contribute to the economic development of community, regions, and the province. It will help attract new investment, job creation, and infrastructure and facility development. It will foster community pride with the creation of events and celebration of local culture.
- Culinary tourism will contribute to businesses and industry stakeholders' bottom line
- The investment in culinary tourism product development will provide improved yield and value of the tourism experience for travellers.
- Innovative culinary tourism packaging will help extend the shoulder season for some operators.
- Culinary tourism, when sufficiently developed in regions and communities, will attract investment dollars from public and private sectors on a provincial level.

Planning Approach:

Short-term to medium term implementation

Working committee made up of steering committee, ministries, and industry stakeholders

Government and industry to support and help fund.

Actions:

10.1 Develop a financial funding model

- Work with the Ministry of Tourism, other government ministries, and industry partners to develop a financial funding model that initiate some of the culinary tourism projects identified in the strategic plan.
- Set initiative priorities using criteria such as those that support the provincial strategy, leverage existing market-ready products, influence or parallel complimentary ministry and industry projects, and those that support more than a single region or community.
- Agree on performance measures and metrics that can be used for all investments

10.2 Invest in communities and regions

- Work with communities and regions currently developing the premier-ranked tourism destination framework for their communities.
- Work with those regions and communities with strong leadership and champions of culinary tourism and where culinary tourism is part of the economic development strategy.

10.3 Create seed funding for regions creating culinary tourism product strategies.

- Create a financial model for seed funding for those communities or regions committed to the development of a culinary tourism strategy. For example, a proposal in British Columbia has been crafted to make a pool of funds available for seed funding of innovative culinary tourism destinations and products.

10.4 Invest in research

- Determine research projects by research working committee

10.5 Invest in a recognition program for culinary tourism

- Determine funding needs by quality assurance working committee

10.6 Create workbooks and resource material

- Develop and deliver workbooks and training manuals on potential sources of financing for the culinary tourism sector. Funnel information to those working committees in communication with stakeholders

10.7 Invest in partnerships

- Spend time educating potential partners by presenting information and holding discussions about culinary tourism. Collaborate with other ministries to incorporate the culinary tourism strategy into their own strategies – work with ministries with mandates in food and agriculture, arts and culture, and within the Ministry of Tourism with individuals working in the areas of agri-tourism, eco-tourism, sports-tourism and others.

ACTION PLAN AND TIMELINES



ACTION PLAN AND TIMELINES

Timelines, Activities and Accountabilities

TIMELINES	ACTIVITIES	ACCOUNTABILITY
Short-Term (Present – 2 Years)	<p>Planning</p> <ul style="list-style-type: none"> • Hold meetings with industry leaders and stakeholders – review strategy and action plan - determine next steps toward the execution of the provincial strategy. • Create a steering committee Representative of industry and regions of Ontario • Create working committees including a 'circle of industry partners' representative of their sectors that will form the planning committee • Provide industry stakeholders with a provincial contact for culinary tourism during the initial release of the strategy or until the "office of culinary tourism" is approved. • Create links to the regions, stakeholder groups and individual associations to work on committees for planning 	Industry stakeholders with MTOUR

<p>Short-Term (Present – 2 Years)</p>	<p>Building Organizational Capacity</p> <ul style="list-style-type: none"> • Create an “Office of Culinary Tourism in Ontario” to champion the implementation of the strategy • Agree to a funding model to support new ‘office’ • Promote this new industry-led ‘office’ and ‘association’ – work with Ministry to get MTOUR endorsement • Develop a 3-year business plan in conjunction with steering committee • Develop a communications strategy and plan including a media plan (in conjunction with MTOUR Media Relations) • Engage industry associations and regions throughout Ontario in increasing awareness and communication about culinary tourism – create ‘ambassadors’ within the regions. • Organize a culinary tourism ‘community of interest’ – include individual business operators and associations interested in culinary tourism as part of their own business strategy or mission. • Develop regional inventories of culinary tourism resources • Create a culinary tourism working committee or networked alliance to create and action plan for a specific region (to be used as a model and benchmark 	<p>New culinary tourism office supported by an industry advisory board, MTOUR</p>
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	<ul style="list-style-type: none"> • Participate in province-wide regional culinary tourism committees to share best practices, models, frameworks, experiences and challenges. • In co-operation with sectoral organizations, conduct a review of impediments to the growth of tourism in the Province, with special attention on the policy and regulatory environment. The review should lead to recommendations for changes, where appropriate and enactment of those recommendations • Initiate a review of environmental, LCBO, TICO, and other regulations – in consultation with representatives from culinary tourism enterprises and organizations, to assess potential changes in current policies and regulations. • Continue to support the Culinary Tourism Symposium as an annual conference for industry stakeholders to gather and share ideas, best practices, and learnings. • Endorse and promote the organization of an industry-led and sponsored culinary tourism provincial committee. 	
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<p>Short-Term (Present – 2 Years)</p>	<p>Communication</p> <ul style="list-style-type: none"> • Disseminate Strategy and Action plan to all industry stakeholders • Hold regional educational sessions for all stakeholders to introduce the culinary tourism strategy and the vision for culinary tourism in the province • Initiate networks and communication linkages to promote exchange of information between food services and producers. • Work with media to highlight the emergence of culinary tourism as a tourism reality in the province. • Create awareness among marketing organizations, including OTMPC, to place culinary tourism as an explicit part of their communications. • Work with MTOUR's media relations office to ensure that culinary tourism is part of every media experience in the Province • Work with colleges and universities that have tourism or culinary tourism researchers and educators to help disseminate and interpret current MTOUR and TAMS research reports to local operators and industry stakeholders • Continue to support the Culinary Tourism Symposium – use it as a venue for continued learning and communication • Create a website for culinary tourism 	<p>CT champion, industry stakeholders, MTOUR, Regions, Associations</p>
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	<ul style="list-style-type: none"> • Create a knowledge repository for communication, research, toolkits, templates and educational materials • Issue regular communication to industry stakeholders • Hold regular update meetings with Advisors and Working Committees • Contact all premier-ranked destinations for consultation • Encourage associations to promote culinary tourism as an explicit themed discussion for members by presenting speakers, researchers, and business people to share their knowledge and experiences. • Actively integrate the culinary tourism into regional framework as identified in the culinary tourism strategy and action plan, to test the benefits of including culinary tourism within this activity. • Highlight and promote culinary tourism destinations/attractions and products in tourism brochures, websites and promotional vehicles to citizens of Ontario, Canadians and international visitors. • Educate all Ministry of Tourism field consultants in culinary tourism and to have them promote and support the organization of regional culinary tourism committees. • Include culinary tourism in any communication to each ministry committee groups – encouraging an ‘all of government’ approach to promote the economic benefits to the culinary tourism supply chain that crosses many ministries and their jurisdictions. 	
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Medium-Term (2-6 years)	<p>Ongoing Communication</p> <ul style="list-style-type: none"> • Establish a seasonal culinary tourism publication or a special feature within an MTOUR publication that highlights the results of the culinary tourism inventory, product development in the regions and success stories. • Develop a province-wide initiative to link to specific market-ready regions and destinations with urban end-users beginning with those regions that are strong in terms of having a critical mass of market-ready culinary tourism products. • Create a format for the development of a calendar of urban and rural culinary tourism events. • Promote the inclusions of food retail outlets featuring Ontario regional food products in the Province's tourism information centres. • Encourage operators to send in stories of their experiences and learning about culinary tourism • Continue to work with human resource councils to promote culinary tourism as a job creator that requires new skills • Continue to work with tour operators encouraging new culinary tourism packaging opportunities 	<p>Champion, working committees, established communication channel partners (media or communication primes in associations)</p>
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	<p>Product & Toolkit Development</p> <ul style="list-style-type: none"> •Initiate development of product inventories in key culinary tourism regions. Establish inventory (and mechanism for updating inventory) of existing culinary tourism products that are market-ready. Encourage the incorporation of this information, as appropriate, into OTMPC and DMOs marketing plans and messages. •Extend development of product inventories to emerging culinary regions. Make inventories available on-line through the Premier-ranked destination framework. •Create a province-wide catalogue of distinctive and high-quality Ontario ingredients and culinary tourism products. •Encourage college and universities to incorporate culinary tourism into their tourism and culinary programs. •Research and write a workbook/ toolkit of best practices in culinary tourism. Distribute to stakeholders. •Support the development, packaging and promotion of existing culinary tourism destinations/events/ products deemed market-ready that have established economic and success measures in place •Create workshops and training programs to assist culinary tourism suppliers to work with the travel trade to create competitive packages. 	<p>Regions, communities, operators, champion, working committees, researchers, industry partners</p>
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	<ul style="list-style-type: none"> •Develop and deliver training material on risk management and liability issues in the culinary tourism sector. •Develop and deliver workbooks and training manuals on potential sources of financing for the culinary tourism sector. •Implement quality standards and performance measures •Pilot a few new product concepts <ul style="list-style-type: none"> - as agreed upon by Advisory Board - used as a benchmark •Support culinary tourism projects in the regions of Ontario that will benefit other regions and support culinary tourism development in the province. •Design, develop and deliver culinary tourism programs and/or courses that are directed to undergraduates, mature students, industry stakeholders and individual business operators in an effort to educate and familiarize 'students' with culinary tourism. •Design internship and externship opportunities with industry stakeholders and economic development offices throughout the province focused on culinary tourism. 	
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<p>Mid Term (2-6 years) - Long-Term (6 – 10 years)</p>	<p>Promotion</p> <ul style="list-style-type: none"> •Begin advertising Ontario as a culinary tourism destination to international market •Assess regional strategies for growth and renewal in developing culinary tourism products •Promote closer communication on culinary tourism issues between the Ministry of Tourism, and the Ministry of Agriculture and Food. •Work with retailers and exporters to establish “Made in Ontario”, “Taste Ontario!” as an international brand. •Work closely with marketing agencies such as OTMPC, DMOs and Regional marketing groups to promote culinary tourism. •Work with CTC to support the awareness and promotion of culinary tourism in Ontario and Canada. •Work with other Ontario ministries to cross promote culinary tourism with Heritage, Agriculture, Northern Development •Encourage food service establishments in Provincial attractions to feature Ontario ingredients and beverages. •Encourage festivals and events supported by the Province to feature Ontario ingredients and beverages as part of their food services. 	<p>Operators, Regions, Associations, OTMPC, MTOUR, DMOs</p>
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	<p>Research</p> <ul style="list-style-type: none"> •Develop a research agenda •Ensure culinary tourism is included, where appropriate in tourism surveys and is explicitly recognized as a research priority in MTOUR and OTMPC. •Proactively seek information and knowledge on culinary tourism on a national and international level and feed this information to industry and regions. •Develop culinary tourism research projects that directly benefit the province and the industry stakeholders including the development of processes, economic measures, quality standards, market intelligence and instruments that can be used by industry to develop culinary tourism products. •In co-operation with sectoral organizations, review impediments to the growth of tourism in the Province with special attention on the policy and regulatory environment. The review should lead to recommendations for changes, where appropriate. •Conduct research on price elasticity for culinary tourism products to help assess impact of taxation level on culinary products (including alcohol) on tourism demand. Assess contributions of culinary sector to government revenues through all forms of taxes and fees. •Conduct research to establish industry financial performance benchmarks to assist culinary tourism enterprises can gauge their performance against industry norms. 	<p>Universities, Colleges, Research Branch of MTOUR, OTMPC</p>
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	<p>Quality Assurance and Evaluation</p> <ul style="list-style-type: none"> •Develop a Provincial food plan for the Province of Ontario in co-operation with OMAF and other relevant ministries. •Evaluate progress, process, partnerships, communication, and economic impacts of culinary tourism. •Evaluate education and training programs •Develop a series of Culinary Tourism Awards. •Continue to review, assess and evaluate strategies across the province •Develop quality standards and performance measures supporting culinary tourism products and destinations. •Create economic indicators and success measure for culinary tourism •Determine whether the Office of Culinary Tourism for Ontario is still a viable entity that serves the needs of industry and the regions 	<p>Champion, MTOUR, Advisory Board, Stakeholder groups</p>
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Taste Trail



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Prince Edward County



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IMPLEMENTATION PLAN

KEY MILESTONES

Launch Culinary Tourism Strategy to government and industry stakeholders
October, 2005
Identify a Steering Committee to work on implementing the Action Plan
October 2005
Steering committee members identify priorities in the Action Plan
Steering Committee lead implementation of key Action Plan items through the formation of working committees or task forces
December, 2005
Report back on priority action items, task force members, implementation details and funding requirements
February, 2006

IMPLEMENTATION SUCCESS MEASURES

Tracking the progress of key milestones indicated in the implementation plan and measuring the performance of the initiatives associated with the Culinary Tourism Strategy and Action Plan will be imperative. The stakeholders in conjunction should design the performance measures with the individual or association that leads the execution of the plan.

In the absence of specific culinary tourism performance indicators, it would be advisable to use market performance indicators currently in use by the Ministry.

Critical to the execution of the plan will be measurements associated with:

Communication:

- Depth and reach of the distribution of the plan
 - Feedback on the plan
 - Interest expressed by stakeholders to participate on working committees
- Funding
- Sufficient funding received to support the business plan creation
 - Sufficient sponsorship or in-kind contributions to support infrastructure
 - Sufficient funding to create communication to stakeholders including website
 - Funding for projects and initiatives identified – research, toolkits

Qualitative and Quantitative data

- Assess inventory of existing culinary tourism products and destinations (%)
- Assess attributable revenues spent by tourists on a select number of culinary tourism products/destinations (Benchmark \$)
- Assess communication that explicitly uses culinary tourism to market (Benchmark %)
- Communication – articles about culinary tourism in Ontario found in media (Benchmark #'s)

