

ACQUIRING A TASTE FOR CUISINE TOURISM

A Product Development Strategy



Discover our true nature

CANADIAN
TOURISM
COMMISSION



COMMISSION
CANADIENNE
DU TOURISME





Vision

Canada will be the premier four-season destination to connect with nature and to experience diverse cultures and communities.

Mission

Canada's tourism industry will deliver world-class cultural and leisure experiences year-round, while preserving and sharing Canada's clean, safe, and natural environments. The industry will be guided by the values of respect, integrity and empathy.

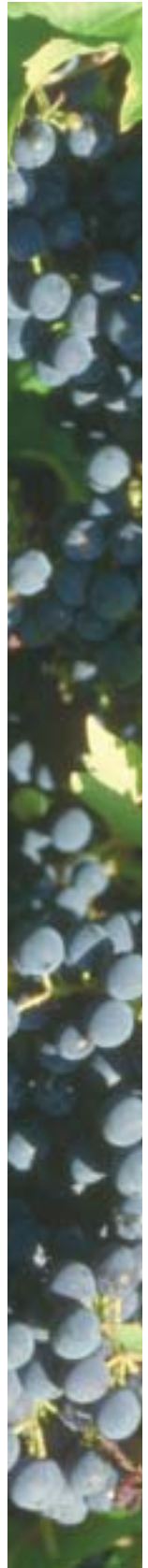


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June, 2002**

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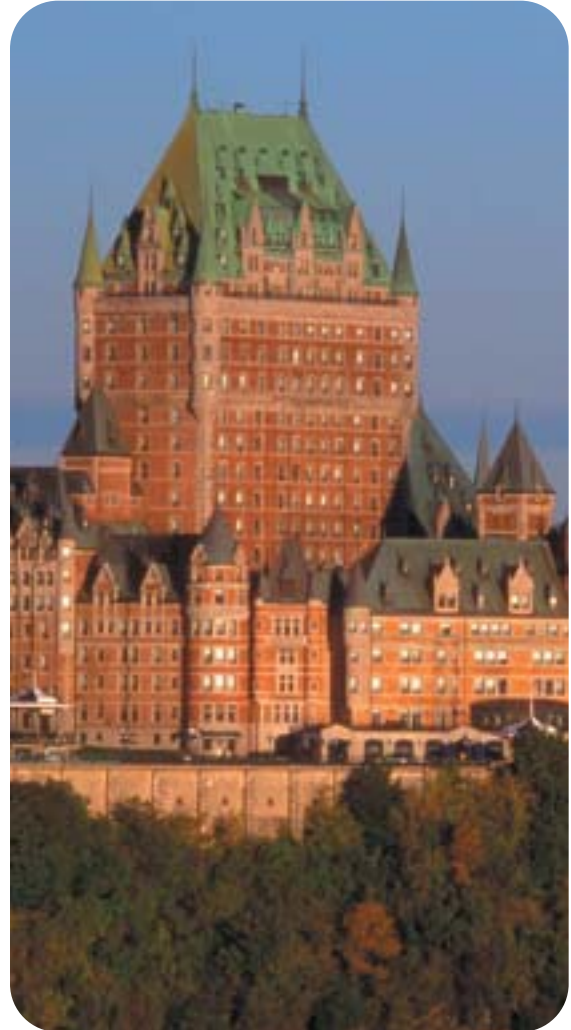
Introduction

Cultural tourism is on the increase as baby boomers flood the market place and seek out new opportunities for education and excitement. Cuisine and gastronomy are elements that add to the cultural tourism experience.

Interest in food and wine has grown in recent years on a global scale and forecasts call for sustained momentum. To meet the demand for culinary-oriented experiences, international competitors have launched such programs as Tasting Australia and The American Institute of Food, Wine and the Arts.

Canada has also taken steps to develop cuisine as a tourism product. Over the past three years, the Canadian Tourism Commission (CTC) has invited a cross-section of industry representatives interested in both tourism and cuisine to nine regional round tables across Canada, as well as a National Tourism and Cuisine Forum. These initiatives were a first step in identifying cuisine's potential contribution to tourism and vice versa.

This Product Development Strategy builds on these initiatives by presenting strategies to strengthen culinary tourism and to enhance Canada's positioning as a tourism destination.



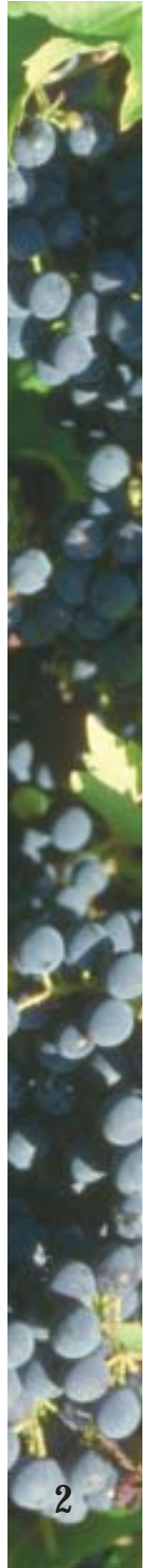
Defining Cuisine Tourism

Cuisine tourism, or as it is also called culinary tourism, goes well beyond the dining experience. It includes a variety of cuisine and/or agri-tourism activities developed for visitors involving food and beverages. These can range from food festivals to farm visits and factory tours, and often involve the cultural discovery of a region's unique dishes.

Cuisine tourism involves provincial/territorial tourism departments, destination marketing organizations, restaurants, convention centres, wineries, cooking schools, etc. The cuisine tourism industry in Canada consists mostly of small and medium-sized businesses.

"Canadian cuisine" or "cuisine in Canada"?

While the terms "Canadian cuisine" and "cuisine in Canada" tend to be used interchangeably, it is useful to distinguish between the two terms. While we do have a number of distinctive regional cuisines, many of the foods and cooking styles found in this country have been adopted from other cultures. This makes it difficult to talk about "Canadian cuisine." "Cuisine in Canada" refers not only to foods that may be considered uniquely Canadian, but also to the tremendous variety of food that results from our multicultural traditions.





Available Culinary Tourism Activities in Canada

The Canadian culinary tourism product includes the following activities:

- Aboriginal feasts
- Agri-tourism activities
- Cooking schools
- Dinner & theatre packages
- Dining in Canada's many renowned fine restaurants/inns
- Farm vacations
- Food festivals
- Fruit picking
- Lobster/oyster/mussels hauling
- Lobster suppers
- Tasting/buying packaged local products/farmer's markets
- Tour a food/wine/beer route
- Traditional "Cabane à sucre" (sugar bush)
- Traditional dining experiences
- Visit a cheese factory
- Visit a food-related economuseum
- Visit a smokehouse
- Winery tour & tasting
- Etc.



Situation Analysis

The Canadian Situation

Although culinary experiences are rarely top of mind when one thinks of tourism in Canada, there are a number of interesting developments in the field.

A growing number of elite chefs across Canada are committed to fostering cuisine excellence. Chefs in Vancouver, Toronto, Ottawa, Montréal, Québec City, Halifax and places in between are gaining recognition for their work. For example, Michael Stadlander's restaurant near Collingwood, Ontario was named one of the top ten restaurants in the world by London's Restaurant Magazine in 2002.

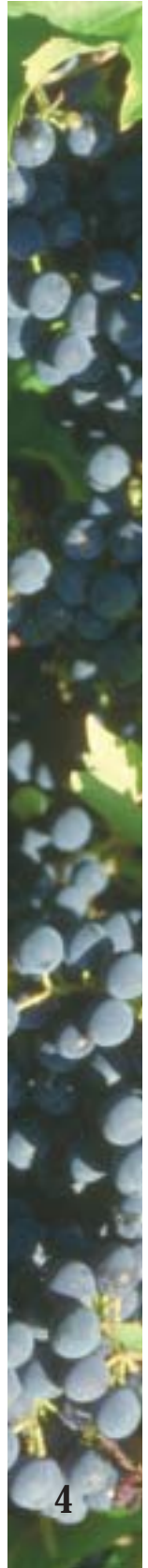


Canadians are taking part in the international movement towards the use of indigenous locally cultivated products and the development of regional cuisine. Atlantic seafood and Alberta beef have long been culinary draws, but now there is increasing use of more specialized products such as Saskatoon berries, Québec cheeses and wild Arctic muskox. Such regional cuisine has the potential to be an increasingly important tourist resource.

Canada has several culinary-oriented festivals that are drawing large numbers of domestic and international travellers. For example, the *Vancouver Playhouse International Wine Festival* is one of the top wine events in the world, while the *Montreal Highlights Festival* offers over 200 cuisine events. Both festivals have teamed with the travel trade to provide visitors with attractive transportation and accommodation packages.

Canadian tour operators are beginning to package cuisine in unique and exciting ways. For example, First Island Tours in British Columbia features a "Gourmet Trail" and an "Ale Trail". Baillargé Cultural Tours offers a "Cuisines of Québec" tour which includes visits to local producers of maple sugar, cider, vinegar and liqueurs as well as a traditional flour mill.

Canadian culinary teams are winning accolades at international competitions. For example, Canada claimed gold at the World Culinary Olympics in 1992. In 2000, Canada won a grand gold in one category and came fourth overall out of more than 25 national teams.





Our foods, wines, beers are competing and winning in world competitions. Canadian ice wines have won gold medals at several competitions including, the Concours mondial de Bruxelles 2002 and Fromagerie Tournevent's goat cheese came second in the American Cheese Society's 2001 competition.

Competitive Challenges

Canada has many competitors when it comes to culinary tourism. When we think of cuisine destinations, we automatically think of France, Italy or Louisiana, but there are many other countries, regions and cities that have also positioned themselves as culinary vacation spots. San Francisco, New York and Las Vegas are good examples of urban culinary meccas.

Many countries are organizing product development and marketing programs designed to promote cuisine tourism.

Taste of Scotland is a countrywide restaurant marketing program that highlights Scotland's many and varied food products as well as marketing the country as a "food destination". This effort is quality based, membership driven and works cooperatively with both the private sector and the government. The project was initiated to raise awareness of and provide new uses for quality local food products, and to promote restaurants that feature these foods on their menus.

The United States of America has launched *COPIA: The American Center for Food, Wine and the Arts*, in Napa, California. The Center

is dedicated to exploring and celebrating the distinct American contribution to the character of wine and food, in close association with the arts and humanities. This unique cultural and educational facility functions as a place for learning, exploration and serious research, and as a destination for celebration and entertainment.

The South Australian Tourism Commission endorses *Tasting Australia*, a biennial international food, wine, beverage and media festival held in Adelaide, Australia. This event showcases the nation's finest foods and beverages to the world's food professionals, the media and epicures. The mandate of the event is to "introduce the world to the wonderful wines and products of the country and to put Australia on the gastronomic map."

Growing Interest in Culinary Tourism

Recent industry and CTC-commissioned studies have documented the growing interest in cuisine tourism.

"An increasingly significant number of travellers are stating that food is a key aspect of the travel experience and that they believe experiencing a country's food is essential to understanding its culture". Condé Nast Publications, Inc. and Plog Research, 2001 Gourmet Travel Study.

In October 2001, the CTC commissioned Pricewaterhouse Coopers to conduct the U.S. Tourism Impact Study to better understand the impact of September 11th on the U.S.

traveller. This study revealed that "the top motivating factor among U.S. travellers is local cuisine at 44% (20% always important, 24% often important)."

Strengths, Weaknesses, Opportunities and Threats for Cuisine Tourism in Canada

Strengths

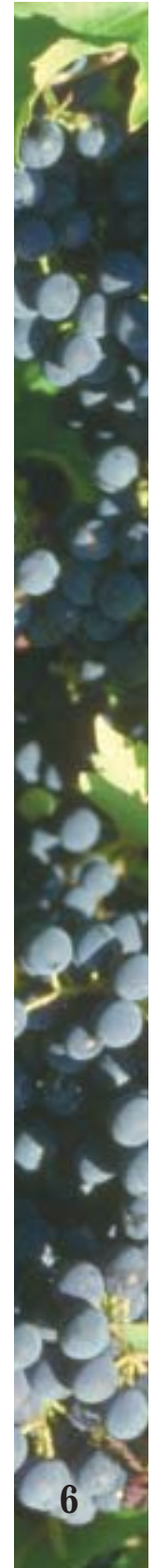
- Culinary tourism in Canada offers tremendous variety, quality and value.
- Canada has renowned chefs and regional products.
- Cuisine is a four-season product that can easily be associated with other Canadian tourism products.



- Canada has two major wine regions: Okanagan, British Columbia and Niagara, Ontario and several others are being cultivated.
- During the last few years, CTC's Product Development group has conducted a wide variety of research pertaining to international competition and the products available in Canada.
- The Canadian tourism industry has experienced strong growth in the past ten years.

Weaknesses

- The international perception of cuisine in Canada is weak or non-existent and needs to be enhanced.
- While the great variety of food and cooking styles found in Canada is generally a strength, it is also a weakness in that there's not a clearly defined style or image that can easily be communicated to consumers.
- There are no national organizations or networks that focus on the development of cuisine as a tourism product.
- Relatively few tourism packages focus specifically on cuisine.
- Public and private sector players need to form new relationships and partnerships for cuisine tourism to flourish.
- CTC sales staff needs more information on cuisine tourism offerings to effectively promote them in international markets.





Opportunities

- Work with existing associations such as Taste of Nova Scotia, Tastes of Niagara and Cuisine Canada to better develop tourism packages.
- Expand beyond local/regional approach to develop cross-Canada products (i.e. Maritime chef sourcing Manitoba food products from a Canadian supplier rather than buying imports).
- Promote local foods to tourists by working with industry and food producers to create export-ready products.
- Increase cuisine and wine promotional activities and partnerships with the industry (major hotels, destination marketing organizations, transportation and accommodation sectors).

Threats

- Budget constraints make it difficult for some provinces and territories to participate in cuisine tourism initiatives.
- The availability of market-ready cuisine tourism products is quite limited in some areas of the country.
- The non-existent or negative perception of cuisine in Canada may make cuisine tourism difficult to promote.

Identifying the Stakeholders

Cuisine tourism involves many players. To further develop cuisine as a market-ready tourism product, there is a need for these players to increase communication and networking. Partnerships need to be built among the following groups and organizations.

- Federal government: the CTC, Agriculture and Agri-food Canada, regional development agencies (i.e. ACOA, FedNor, WED, CED-QC) and the Canadian Tourism Human Resource Council.



- Provincial and territorial governments: various organizations representing tourism, fisheries, culture, agriculture, aboriginal groups etc.
- Industry - tour operators, cuisine associations (e.g. Cuisine Canada, Canadian Federation of Chefs and Cooks, Culinary Team Canada, etc.) and other related non-government organizations.

CTC's Objectives

The objectives of this Product Development Strategy are to:

- Determine how cuisine can play a stronger role in strengthening Canada's position as a tourist destination.
- Explore product development opportunities for cuisine.
- Document the people and organizations actively building and promoting cuisine.
- Promote cuisine-related marketing initiatives in all CTC markets.

To achieve these objectives there are strategies and actions needed in 5 areas:

- **Research**
- **Product Development**
- **Marketing**
- **Training and Education**
- **Industry Stakeholder Communications.**

Strategy 1 - Research

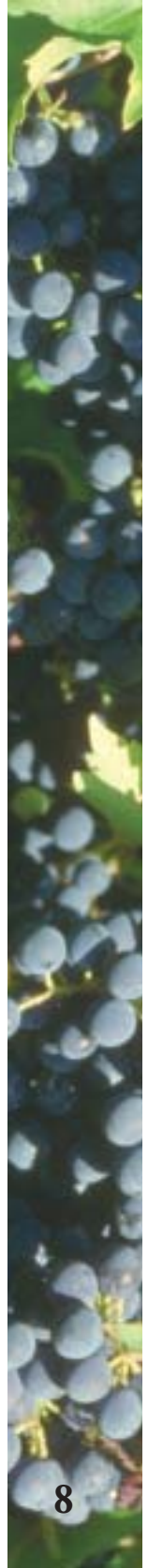
Objective

Interested cuisine and tourism groups (CTC, provinces/territories, DMOs, regional groups) must undertake research that will provide a better picture of the overall impact of culinary tourism.

Strategies and Actions

1.1. Conduct and compile economic impact studies.

- Carry out research programs on the cuisine tourism sector to gather economic impact data.
- Analyze and synthesize economic impact data and estimate the size, scope and economic impact of the cuisine tourism product as a whole in Canada.





1.2. Conduct and compile market research studies.

- Carry out market research specifically related to the demand for cuisine tourism.

1.3. Communicate research findings to industry and government.

- Produce and disseminate credible, informed highlights of product and market research in a user-friendly and useful format to industry and government.

1.4. Create a mechanism for long-term research and data collection.

- Identify research requirements not fulfilled by current research programs.
- Identify means to consistently collect, analyze and communicate data on the cuisine product in Canada in a timely and useful fashion.
- Develop strategic alliances with Canadian post-secondary researchers, and industry research groups so that all available data on cuisine tourism is effectively coordinated.

Strategy 2 - Product Development

Objective

The CTC Product Development group will encourage the preparation of educational materials that will assist the development of

this relatively new product and the maturation and profitability of existing cuisine tourism products in Canada.

Strategies and Actions

2.1. Develop and influence market-ready cuisine tourism products.

- Develop criteria for market-ready products.
- Undertake selected destination assessments to determine best opportunities for new product development.
- Gather and assess existing market-ready training materials and programs and support their evolution and enhancement to support cuisine tourism.
- Initiate market-readiness pilot projects and facilitate widespread access by cuisine and tourism stakeholders.

2.2. Foster the packaging and enhancement of existing market-ready and near market-ready products.

- Produce and distribute educational materials on packaging and partnerships.
- Initiate packaging pilot projects and make them widely available to the culinary tourism industry.
- Inspire through example with the use of "best practices" and other tools that communicate techniques for success.

2.3. Encourage the development of quality-based industry standards.

- With the support of Cuisine Canada and other cuisine-related organizations, determine how best to develop quality based industry standards. These standards would serve to increase industry quality levels and could be used as a tool to inform travelers about distinctive local cuisine offerings.

Strategy 3 - Marketing

Objective

The CTC Product Development group will assist in influencing the branding, marketing opportunities, and market development of culinary tourism products in Canada.

Strategies and Actions

3.1. Develop national, regional and sector brand images.

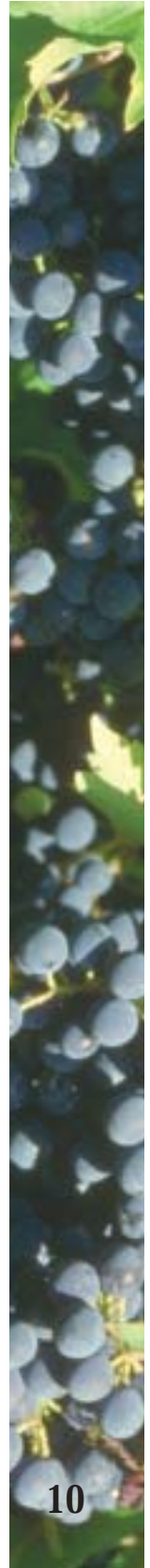
- Establish brand images for cuisine tourism in Canada. This may be done by national images, regional images, or activity sector images. Good examples in Canada include Taste of Nova Scotia and other similar regional "Taste" campaigns.
- Encourage the use of this branding in the marketing of Canadian culinary tourism.

3.2. Target the United States and domestic markets as priorities.

- Ensure that cuisine is featured in CTC domestic marketing activities by providing up-to-date information on new culinary tourism products/packages.
- Promote the inclusion of cuisine into provincial/territorial tourism marketing campaigns aimed at the domestic and American markets.
- Ensure that cuisine tourism is featured in CTC marketing campaigns in the United States.
- Increase travel trade and media awareness.

3.3. Create awareness and raise the profile of cuisine tourism in tourism marketplaces.

- Encourage key players to highlight cuisine tourism and especially regional food products in CTC marketing activities.





- Provide input to the design/content of cuisine tourism travel-oriented marketing, media and public relations initiatives offered by the CTC.
- Encourage presentations on culinary tourism at domestic and international marketplaces.

3.4. Develop an adequate bank of culinary images for use in CTC marketing programs, by CTC international offices, the media and others.

Strategy 4 - Training and Education

Objective

The CTC Product Development group will encourage and facilitate the training and education of those interested in cuisine tourism in Canada, in partnership with Canadian stakeholders in tourism human resource development.

Strategies and Actions

4.1. Conduct research on professional development needs.

- Determine the professional development needs of those working in the culinary tourism industry in order to develop responsive materials and training programs.

4.2. Facilitate business level training.

- Concentrate on the development of a well researched training curriculum that is practical, niche-oriented, and that brings buyers and sellers together.
- Facilitate business level training that will be ongoing and evolutionary in nature.

4.3. Promote training partnerships to develop and deliver national training programs.

- Develop a partnership between the Canadian Tourism Human Resource Council, Culinary Team Canada and/or Cuisine Canada, and post-secondary institutions to develop, adapt and deliver programs to train employees in both sectors about the potential of culinary tourism in Canada.
- Identify training needs not covered by existing programs or other agencies and focus on filling these gaps with original and developmental training programs.
- Concentrate on training programs that have wide appeal, are cost-effective and specifically oriented to cuisine tourism.

- Develop training programs that raise the standard of cuisine tourism operations in Canada.

Strategy 5 - Industry Stakeholder Communications

Objective

The CTC Product Development group will facilitate effective communication mechanisms and business linkages within cuisine tourism's diverse and vast industry.

Strategies and Actions

5.1. Develop information materials on cuisine tourism and distribute these through existing industry channels and the Internet.

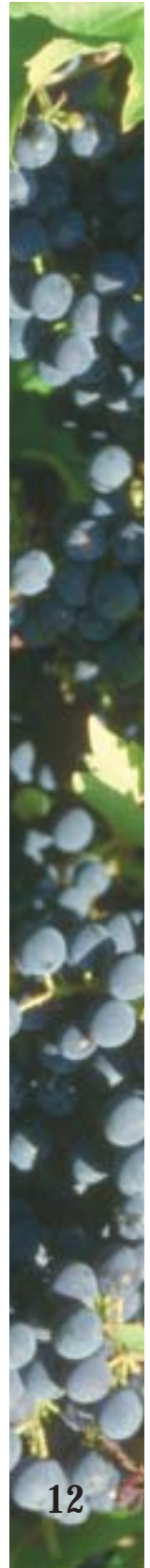
- Produce special reports and information resources about culinary tourism and distribute these through key professional industry-targeted print and electronic communication channels, including relevant national, provincial/territorial and regional communications vehicles.
- Produce a web link on CTX that will assist industry-led organizations to promote their services and handle direct inquiries for research, product development or marketing information on culinary tourism.
- Produce CTC articles on cuisine tourism and encourage the industry to submit articles on a regular basis through *Tourism*, the CTC's monthly newsletter,

and other industry newsletters to raise cuisine's profile.

- Promote awareness of culinary tourism information contained in the CTC's Tourism Reference and Documentation Centre (TRDC) to industry stakeholders and encourage use of other information clearing houses.

5.2. Create formal linkages between federal and provincial/territorial governments, as well as between government and industry.

- Initiate or actively participate in relevant national or provincial/territorial meetings, conferences and educational programs to





increase the visibility and awareness of the CTC's involvement in culinary tourism.

For example, hold cuisine tourism panels/workshops at Cuisine Canada's Northern Bounty Conference, host a second National Tourism and Cuisine Forum, or pursue regional round tables in the North or other regions.

- Encourage the combining of cuisine with other CTC product development areas such as Cultural Tourism, Outdoor, Winter, and Product Clubs. Encourage the creation of strategic alliances or partnerships to foster dialogue on common issues and share best practices.
- Hold annual joint meetings between the CTC's Product Development staff and provincial/territorial staff responsible for product development or regional industry development agency staff (ACOA, WED, FedNor, CED-QC). These meetings should promote networking, work plan information exchanges, and the development of partnered initiatives to continue product development across priority product lines.

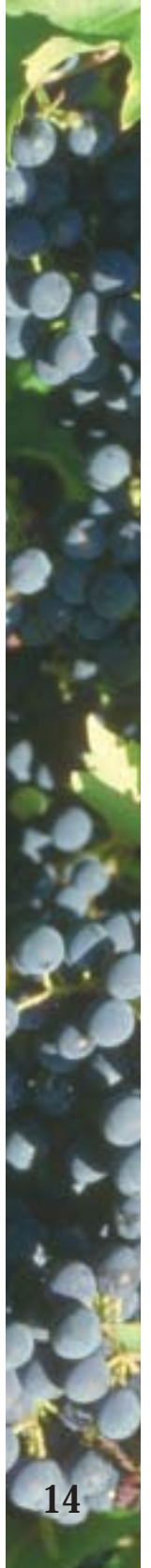
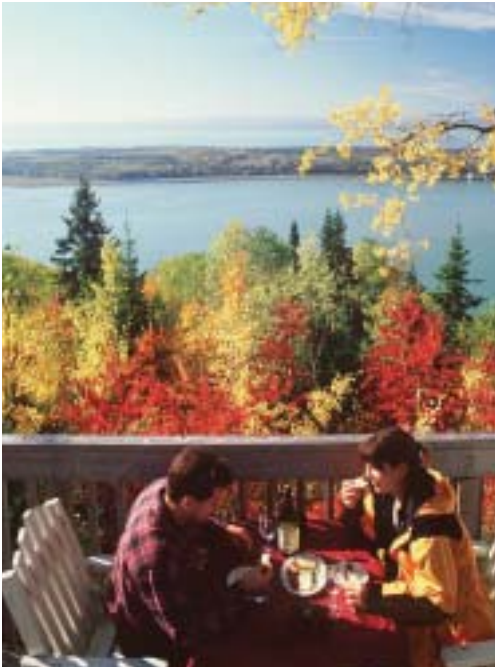


Conclusion

Although our cuisine may seldom be the primary reason that visitors travel to Canada, it is a significant aspect of the tourism experience and an area with great potential to enhance Canada's tourist appeal. Culinary tourism has an important role to play in the Canadian tourism product offering and the CTC must focus on realizing its potential.

This Product Development Strategy is based on three years of activity by the CTC, provincial and territorial governments, destination marketing organizations and the industry. It responds to issues identified by stakeholders and sets the stage to develop this new and trendy tourism product.

The measures outlined in this report are intended to provide strategic direction to the CTC Product Development initiatives and the different provincial/territorial or regional groups involved in developing cuisine as a tourism product. The report will also provide a framework to determine cooperative actions and partnership funding decisions between the CTC and culinary tourism partners.





CTC Cuisine Tourism Task Force

(June 2001 - January 2002)

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