

Ontario's Four-Year Culinary Tourism Strategy and Action Plan 2011-2015

VISION: By 2015, culinary tourism in Ontario is valued as a leading contributor to a vibrant and sustainable tourism economy in the province.

BUILDING ON SUCCESS

We are pleased to forward the Four-Year Culinary Tourism Strategy and Action Plan (2011-2015). It is informed by the thoughts, ideas and analysis of many within the culinary tourism and hospitality sectors and reflects their aspirations to ensure a sustainable culinary tourism sector in Ontario.

The Strategy updates and builds on the 10-Year Culinary Tourism Strategy and Action Plan and responds to the changes and challenges in the provincial and global environment that may have had an impact on the sector over the past five years.

The vision of the Strategy is to ensure that: ***By 2015, culinary tourism in Ontario is valued as a leading contributor to a vibrant and sustainable tourism economy in the province.*** It sets out the menu of steps and sub-strategies to achieve this vision and ensure this sector is economically, culturally, and socially sustainable. There are solid opportunities to make this happen – across all regions of Ontario.

Three values underpin the strategy: Commitment, Collaboration and Communication. By adopting these values, we believe all partners in the culinary tourism value chain benefit from the outcomes identified in the Strategy – and ultimately so too will visitors to Ontario.

The implementation of the original 10-Year Culinary Tourism Strategy and Action Plan has garnered great progress and profile for culinary tourism in Ontario and the demand has flourished beyond expectations.

However, the sector has reached a fork in the road. Now is a time to be decisive – to act on the opportunities laid out in the strategy to ensure sustainable growth and support the ambitious goals of Ontario's Competitiveness Study – *Discovering Ontario, a Report on the Future of Tourism.*

We all know that “what gets measured, get's done.” The Strategy also addresses the need for performance measurement and evaluation to ensure continued growth and success of the sector.

We look forward to working with the Ministry of Tourism and Culture in the coming years to realize the vision and outcomes contained within and to communicate our successes in the form of greater tourism visitations in Ontario, driven in part by a vibrant culinary tourism sector.

The Ministry, the Ontario Culinary Tourism Alliance and our many partners and stakeholders each has a crucial role to play and the Strategy provides the guidance to help us all contribute.



Rebecca
LeHeup



Eugene
Zakreski



Tony
Elenis



Hersch
Jacobs

Culinary Tourism 2011 - 2015



photo by Jon Ogryzlo

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"Chefs are positioned in our society in such a way that we can potentially influence people about the choices they make around food and where it comes from."

Jamie Kennedy, Chef, Founding member of the Culinary Tourism Advisory Council 2005

EXECUTIVE SUMMARY

The Four-Year Culinary Tourism Strategy and Action Plan builds on and updates the 10-Year Culinary Tourism Strategy and Action Plan 2005-2015 released in 2006.

The Strategy provides the vision and direction to lead the culinary tourism sector into the future, meet the challenges and opportunities facing the Ontario tourism industry and capitalize on new developments – specifically the establishment and implementation of the Ontario government's Regional Tourism Strategy launched in 2010 following the release of The Ontario Tourism Competitiveness Study – *Discovering Ontario, a Report on the Future of Tourism* released in February 2010.

It realigns the 10-Year Strategy and Action Plan to support the goals and objectives of Ontario's new regional tourism focus and the 13 Regional Tourism Organizations (RTOs) that have been established to drive regional tourism development across the province. [See Appendix A for map of Ontario with RTO boundaries]

This Strategy provides an overview of culinary tourism in Ontario over the past five years, describes the role of the Ontario Culinary Tourism Alliance (OCTA) in driving the sector forward and offers an analysis of factors affecting the sector at this time. It also outlines nine outcomes and recommends accompanying strategies for moving the culinary tourism agenda forward to ensure that this vital sector continues to contribute to the vitality of Ontario's tourism industry.

2011- 2015 Outcomes

While there has been significant and wide ranging development within the sector over the past five years, during the next four years, Ontario is positioned to make substantial strides in culinary tourism. The following outcomes are linked directly to the strategic goals and actions required to support the overall tourism objectives of the province.

1. Ontario has strong leadership and a sustainable organization to advance culinary tourism within the Regional Tourism Organizations.
2. Ontario has an increased number of market-ready culinary tourism products aligned within the Regional Tourism Organizations.
3. Ontario has consistent quality culinary tourism products and experiences that showcase the regions of Ontario.
4. Ontario has greater recognition of culinary tourism as a market and economic driver for the province within the Regional Tourism Organizations and among stakeholders.
5. Ontario has a province-wide culinary tourism brand and product guidelines.
6. Ontario has an understanding of culinary tourism as a tourism motivator.
7. There are stronger linkages between the Ministry of Tourism and Culture and the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) for a more coordinated and integrated promotion of local food and culinary tourism experiences.
8. Ontario has a culinary tourism sector across each region of the province that is dedicated to continued improvement and the measurement of its performance.
9. Ontario has a vibrant and growing community of entrepreneurs within each region of the province successfully delivering innovative culinary tourism experiences.

It is clear that culinary tourism can help the province reach its overall objectives to increase tourism revenues and achieve the goals as set out by the Ontario Tourism Competitiveness Study. For this to happen over the next four years, a committed focus on product development in collaboration with the RTOs is needed with structured communications to ensure clear information and knowledge transfer.

Inviting the world to our table



photo by Jon Ogryzlo

CULINARY TOURISM 2011-2015

Vision

The vision of the Four-Year Culinary Tourism Strategy and Action Plan is:

By 2015, culinary tourism in Ontario is valued as a leading contributor to a vibrant and sustainable tourism economy in the province.

Values

The Four-Year Culinary Tourism Strategy and Action Plan is underpinned by three key values: **Commitment, Collaboration** and **Communications**.

These three values are the foundation for a sustainable approach to the development of Ontario's culinary tourism sector. If embraced, these values will ensure that we achieve the vision.

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.

BACKGROUND

Overview of Culinary Tourism in Ontario

Virtually any tourism experience is enriched by food and drink.

Done properly, culinary tourism tells the story of the heritage, the people and the landscape of a geographic area. It reflects 'place', enriches experiences, and can be a valuable tool to boost economic, social and community development.

While some would suggest that culinary tourism is a niche market, its potential to motivate and attract travellers is ripe. All tourists eat, including the more than 42.3 million overnight visitors Ontario welcomed in 2008, of which 80.6 percent are domestic (to Canada) visitors (Travel Survey of Residents of Canada, 2008; and International Travel Survey, 2008).

According to the International Culinary Tourism Association (ICTA), the interest in food and drink is reflected in the growth of food media, the explosion of local food movements and the number of mainstream events now featuring local and regional cuisine – and this is certainly the case in Ontario.

In its 2010 – *The State of the Culinary Tourism Industry Readiness Index*, ICTA cites Ontario as one of three world-wide leaders in culinary tourism among the nine countries surveyed. The province is characterized as a “Hotspot” based on the level of culinary tourism activity in community, education, development and promotion.

From the sweet maple syrup of the sugar bush, the wild rice and cranberry fields of our traditional outlay to the harvest of our farmlands and waterways and the rich abundance of ingredients and new food and drink products brought to us by people of the world – Ontario’s culinary tourism products and experiences offer a cornucopia of opportunities for the tourist. Ontario is truly a “Foodland” worth discovering.

Ten-Year Culinary Tourism Strategy and Action Plan – 2005-2015

In 2005, MTOUR commissioned the 10-Year Culinary Tourism Strategy and Action Plan 2005-2015, recognizing the potential for increasing culinary tourism in the province.

The report recommended a number of strategies and actions that would become the foundation for the implementation of a provincial plan. Many of these strategies were executed by a newly-formed culinary tourism organization established in 2006, the Ontario Culinary Tourism Alliance (OCTA). OCTA's mandate has been and continues to be to lead the implementation of the plan on behalf of the province. In **Appendix B** of this report you will find details of the implementation plan and the accompanying achievements to date. OCTA, as an industry led alliance, is a perfect example of the leadership needed to bring a report such as the 2005-2015 Strategy and Action plan to life.

The remaining pages of the Background provide a snapshot of the first five years of implementation including a brief review of the first five regions selected as having the most potential for success in Culinary Tourism; current trends, influences, views and a mini SWOT analysis.



Ontario Culinary Tourism Awards

The Initial Five Culinary Tourism Destinations

In the original 2005-2015 Culinary Tourism Strategy and Action Plan, there were **10 success criteria** outlined to identify potential culinary tourism regions in Ontario. These included:

- 1. Leadership**
- 2. Market-ready or near-market-ready culinary products and resources**
- 3. Integrated strategy**
- 4. Partnership and Community-based collaboration**
- 5. Financial support and performance measures**
- 6. Destinations with good access from key origin markets**
- 7. Sufficient market intelligence**
- 8. Culinary tourism resources distinctive to the region**
- 9. Destination with multiple culinary tourism experiences**
- 10. An effective destination marketing organization (DMO).**

Five geographic areas were identified as having the most potential to be successful at implementing culinary tourism in their region. The following pages provide a snapshot of those identified areas.

Niagara Region

This premier tourism destination is renowned for its burgeoning wine industry and the bounty of produce and potential culinary tourism experiences. The Niagara Culinary Trail was developed to capitalize on these offerings. Culinary tourism in Niagara has progressed slowly but steadily in Niagara. Below are some of the highlights:

- There are more farm events such as elaborate dinners in orchards and vineyards.
- More and more chefs want to use local foods, however access is still a challenge.
- The Niagara Culinary Trail links consumers with sources of local food. They have a new local food culinary guide that promotes local food destinations through 5 distinctly different areas of the region.
- The number of farmers' markets in the region are growing as attendance increases.
- Work continues to bring a stronger relationship between the wine industry and local food partners.
- Niagara is hopeful that the new tourism association will see a role for local food in their tourism plans.
- The Niagara Region under the Agricultural Task Force and the Niagara Culinary Trail has formed a strong relationship and has engaged in a number of initiatives.

Local food has definitely formed a new sector in the region with strong legs that will see the continued growth of local food in a region that is rich in agriculture.



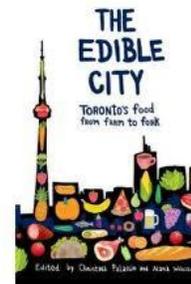
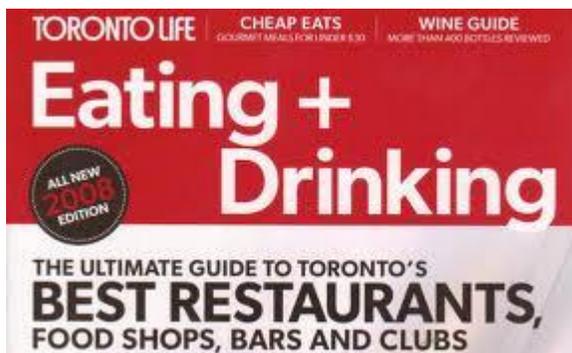
(Photos by Jon Ogryzlo)

Toronto Area

With its rich multicultural culinary offerings, more than 9,000 restaurants, plus farmers' markets, pick-your-own farms, agricultural fairs, food stores featuring local and gourmet ingredients, the Toronto area is the culinary hub of the province with tremendous potential for development as a world-class culinary tourism destination. The volunteer-driven Savour Toronto organization was formed in 2006 and actively worked with the Savour Ontario Dining Program and OCTA to develop and showcase Toronto's offerings. However, the momentum couldn't be sustained because of a lack of funding and the volunteer nature of the organization. In March 2011, OCTA was contracted by RTO 5 (Toronto, Brampton and Mississauga) to begin work on Phase One of OCTA's Culinary Tourism Product Cycle which should help regenerate the momentum of interest and maximize the development of market-ready culinary tourism products - a critical development in this, one of the key tourist gateways to the province.



Toronto Food Tours



Muskoka

This area continues to evolve as a key culinary tourism destination. Savour Muskoka has diligently developed its membership base and culinary tourism products and experiences including special events. The organization has received funding from the Ontario Trillium Foundation to support this growth and has reached out to OCTA for support in developing new culinary tourism products. Muskoka continues to create culinary tourism products and has successfully launched high quality culinary events, trails, packages and experiences. SAVOUR Muskoka also offers use of its logo for any grown locally and locally produced foods. This logo also is available to member restaurants that can use it to highlight signature offerings indicating that they have been made with local product. . Savour Muskoka was also invited to have a booth at the G20 Summit in Toronto last summer to highlight some of the food products produced in Muskoka.



Surrounded by various different beers, Curt Dunlop and Jed Corbett, (seated) to The Griffin and its loyal customers. Photograph: Paul Bennett



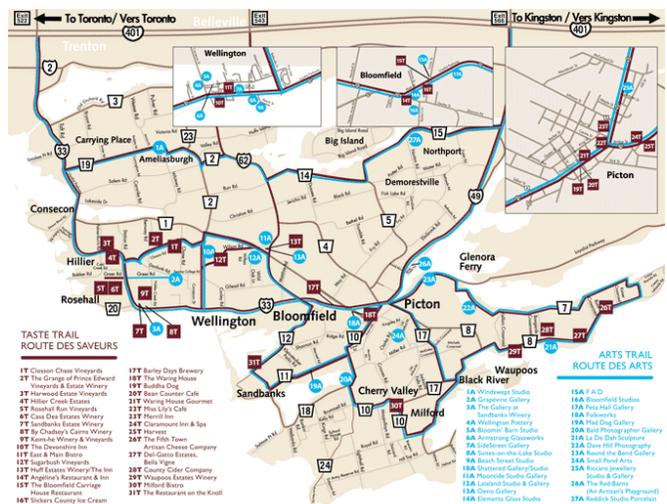
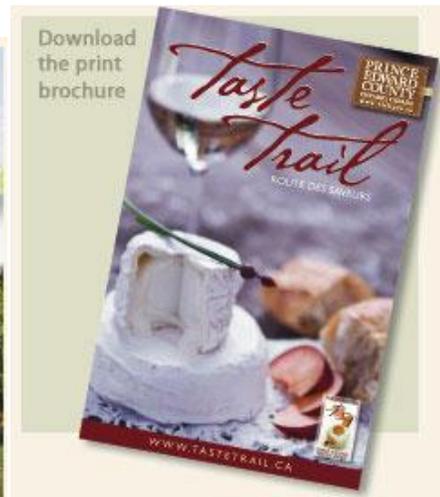
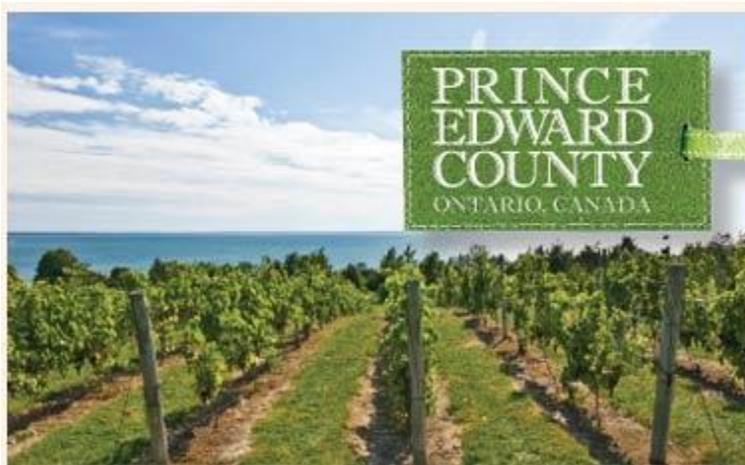
Ottawa

Savour Ottawa has done an award-winning job of advancing culinary tourism in the region, winning OCTA's Leadership Award in 2010. Much of the work has focused on developing verification and standards programs to ensure consistent quality of culinary tourism products. Solid partnerships and collaboration are the cornerstones of the group's success as they evolve. Among its many grass-roots culinary activities, the group hosts an Annual Food Summit and "Meet and Greet" events for chefs and local producers.



Prince Edward County (PEC)

As the area in the forefront of culinary tourism development over the past decade, Prince Edward County continues to flourish with the PEC Taste Trail, Harvest in the County, Countylicious and various wine and food festivals and events. Over the past five years PEC has attracted many artisanal food and beverage businesses and has packaged culinary tourism products with local cultural businesses and entities. Taste the County, the destination marketing organization, works closely with OCTA and is now active with representation on the RTO 9 Board. The RTO has confirmed that they will move forward with Phase One of OCTA’s Product Development Cycle which includes an inventory of current culinary tourism products, a culinary tourism GAP analysis and an assessment of new culinary tourism product opportunities across the region.



Other Ontario Destinations

Although the original 10-Year Strategy and Action Plan focused on these five regions, many others have started culinary tourism organizations and launched successful and award-winning products. Stratford, Elora, Norfolk County, Grey Bruce and others have transformed their tourism offerings substantially with the addition of culinary tourism products, , while other regions such as Waterloo Region and Chatham-Kent are beginning to explore culinary tourism as a new product offering to enhance the quality of their tourism experiences and to increase their competitiveness in the tourism market.



Celebrate 9 days of food – Savour Stratford Perth County Culinary Festival – September 18 – 26



Leadership – The Ontario Culinary Tourism Alliance (OCTA)

The Ontario Culinary Tourism Alliance (OCTA) was formed in direct response to the 10-Year Culinary Tourism Strategy and Action Plan as the organization entrusted to implement the plan.

Since its beginnings, OCTA has operated as a not-for-profit organization under the administrative and legal umbrella of the larger, incorporated Ontario Restaurant, Hotel and Motel Association (ORHMA). An OCTA Advisory Board comprised of a Board Executive and representatives of its member organizations provides oversight and governance to the organization. OCTA membership has grown from the initial five destinations to 26 and several industry organizations representing some 10,000 businesses and producers throughout Ontario.

Destinations now include: Toronto; Niagara; Ottawa; Stratford; Prince Edward County; Norfolk County; Huron County; Simcoe County; Chatham-Kent; Guelph-Wellington; Creemore; Grey Bruce; London; Durham; Kingston; Peterborough & Kawarthas; Northumberland; Elora Fergus; Windsor Essex, Sarnia Lambton; Muskoka; Sudbury; Hamilton; Hastings County; and Burlington.

Other members include the Wine Council of Ontario, Ontario Hospitality Institute representing all post-secondary educational institutions throughout the province, Ontario Restaurant Hotel and Motel Association, Ontario's Finest Inns, Greater Toronto Area Agricultural Action Committee, the Ontario Craft Brewers, and Ontario Farm Fresh Marketing Association.

OCTA Vision

For Ontario to become the destination of choice for travellers seeking to enrich their understanding of diverse regions and cultures through authentic culinary tourism experiences.

OCTA Mission

- Help build and sustain regional identities, agricultural resources and food supplies
- Provide opportunities to develop new tourism products and experiences
- Become a way in which we share our stories and tell them with pride.

Now, at the mid-point of the 10-Year plan implementation, OCTA is on target in its delivery of the plan's outcomes and has exceeded all expectations for industry engagement and participation. It has over-achieved its membership objectives for regional support by 300 per cent. OCTA is now acknowledged by many as a centre of expertise in the area of culinary tourism providing consultation, facilitation and assessment, product development (packaging, pricing, promotion and placement), tool kit development, workshops and research.

The organization provides its expertise through a variety of channels including on-site visits, an interactive website with on-line resources, educational workshops, speaking engagements, industry consultations and one-on-one membership visits.

The level of interest and requests to OCTA is steadily rising, in part due to trends in the food and beverage sector:

Food and Beverage Trends:

- Growing consumer interest in farm/producer branded products with a story
- The marketing of new cuts of meat(e.g. flat iron pork)
- Growing interest in heritage vegetables, fruits and breeds
- Growing demand for healthy herbs, spices and fruits such as blueberries, rhubarb, shallots and pumpkin seed
- Innovative, non-alcoholic beverages particularly those incorporating local ingredients or flavours
- A growing recognition of the value of partnerships and strategic alliances in tourism for both marketing as well as product innovation
- Increasing use of social media by consumers to access information about culinary opportunities and to comment on these opportunities (such as restaurant reviews), as well as web-coupons and location-based social media (tied to visitors in specific regions)
- Wider use of technology including kiosk ordering for restaurant meals and i-Pad wine lists and Apps.

Increasingly, destinations/communities across the province are working to develop culinary tourism as a motivator for attracting tourists and have sought out the expertise of OCTA to support product development and marketing.

Over the past five years and through its recent planning process, OCTA has identified that many destinations, organizations, regions and recently established Regional Tourism Organizations (RTOs) often take a tactical approach to developing culinary tourism products, and that there is a significant gap in how these are strategically linked to the overall tourism objectives of the region and the province. As well, there is an identified lack of success criteria, performance measures and return-on-investment (ROI) analysis for many of these initiatives.

In March 2011, RT0 5 (Toronto, Brampton and Mississauga) contracted OCTA to begin work with the organization on product development and RT09 (Prince Edward, Frontenac, Hastings, Leeds and Grenville, Lennox and Addington and Stormont, Dundas and Glengarry Counties) has confirmed the same.

Ontario's Tourism Competitiveness Study & Culinary Tourism

One of the key drivers for this report is the Ontario Tourism Competitiveness Study – *Discovering Ontario, a Report on the Future of Tourism* www.mtc.gov.on.ca released by the Minister of Tourism in February 2010,. That study is a call to the province and Ontario's tourism industry to take action to "fundamentally improve tourism in Ontario and to renew our products and experiences". The report sets out an ambitious goal - to double tourism receipts from \$22 billion in 2009 to \$44 billion by 2020.

The Competitiveness Study recommends four key strategies to capitalize on Ontario's tourism potential and to meet its ambitious target – two of which are directly applicable to enhancing and developing the culinary tourism potential in Ontario.

One of those strategies – **"Reach Out"** – calls on the province and the tourism industry to "focus on unique product offerings of regions, including natural experiences, great water assets as well as niche tourism experiences such as sports, culture, **culinary and eco and agricultural tourism.**"

A second strategy – **"Set Standards of Success"** – is also applicable. This strategy suggests that tourism leadership be encouraged **"to fulfill its potential as a tourism destination and a contributor to the economy."**

There is clearly a need to develop measurements to assess the success of packaged tourism products, including culinary, and how they contribute to the regional and provincial economies.

And, developing quality culinary tourism products is critical to meeting the target set out in the study and is a significant contributor to the economy.

In 2010, the commercial and non-commercial foodservice sector in Ontario had forecast sales of \$22.5 billion and employed more than 404,000 individuals. (Statistics Canada, CRFA).

According to Lori Stahlbrand, President of Local Food Plus, the economic impact of eating local food has a 3:1 impact on the local economy. And according to the President of the Wine Council of Ontario, Hillary Dawson, the impact of consuming Ontario wines is in excess of 11:1 in economic impact.

Research findings of the International Culinary Tourism Association reported at a North American culinary tourism conference in Victoria, British Columbia in 2004, underline just how vital this sector of the tourism industry is; Nearly 100 per cent of all tourists dine out when traveling and food and beverage as a category ranks first and foremost in visitor spending – even more than lodging.

Dining is consistently one of the top three favourite tourist activities. There is a high correlation between tourists who are interested in wine/cuisine and those interested in museums, shows, shopping, music and film festivals and outdoor recreation (Quantified Marketing Group 2010).

Furthermore, visitations to family and friends are recognized as one of the key motivators for travel to most regions across the province. Therefore, it is strategic to educate local markets who will influence the itineraries and experiences of their visitors and drive economic activity.

The Competitiveness Study also suggests that both the province and the tourism industry should be “**committed to the measurement of success**” – a recommendation that the Four-Year Culinary Tourism Strategy and Action Plan addresses.

Ontario’s Culinary Tourists

OCTA’s research over the past number of years indicates that there are three distinct segments of the culinary tourism market:

First: The market comprised of approximately 10 per cent of tourists who plan trips based on the food experience. They spend twice as much on their tourism experience overall as any other tourist (Richard Wade and Ryerson University Report 2004).

Second: Eighty per cent of tourists who include a food experience into their overall itinerary. While food may not be the primary motivator attracting travellers to that destination, food is of growing importance to that overall experience. OCTA sees this market as having the greatest opportunity for culinary tourism product development.

Third: The 10 per cent of tourists who are travelling through and make an unplanned stop to eat. OCTA sees an opportunity to work with RTOs to promote local culinary tourism experiences at some of these stop-over locations, e.g. to make information about local culinary tourism experiences available at service centres and Tourism Information Centres.



CURRENT STATE

There are a number of current factors that could influence and impact the current and future outlook for tourism in general – and culinary tourism specifically in Ontario.

GLOBAL INFLUENCES

Strong Canadian Dollar

The strength of the Canadian dollar, now on par with the US dollar, could have an adverse effect on Ontario's domestic market (its largest tourism market) as it makes international travel more attractive.

Rising Gasoline Prices

The recent jump in gasoline prices and developments in the Middle East could have a negative impact on Ontario tourism as travellers cut down on both day trips and air travel into Ontario.

Rising Commodity Prices

Rising oil/gasoline prices could in turn prompt further Food Commodity Prices which have increased steadily over the past twelve months. This will no doubt translate to rising costs for restaurant and other food experiences.

Commodity Food and Beverage Price Index - Monthly Price - Commodity Prices

Month	Value
Feb-10	140.98
Mar-10	141.69
Apr-10	145.68
May-10	143.23
Jun-10	140.19
Jul-10	147.35
Aug-10	154.27
Sep-10	158.45
Oct-10	164.94
Nov-10	167.6
Dec-10	178.43
Jan-11	185.49

Source: International Monetary Fund. Includes cereal, vegetable oils, meat, seafood, sugar, banana and oranges Price Indices.

Rising Food Costs

Due to an increase in the price of basic inputs such as fuel and fertilizer, as well as growing demand for foodstuff from emerging markets such as China and India as their middle class grows, the cost of many food products around the world is rising rapidly.

Rising Interest in Local Foods

Consumers generally are showing increased interest in local foods. There are multiple reasons for this rise in interest: (1) a belief that local foods are more environmentally-friendly, especially when one considers the carbon footprint of transportation of food products, (2) a feeling that food quality may be higher with local food and that, especially Canadian-grown foods is less likely to have contaminants than some imported foods, (3) the belief that local food are fresher and thus taste better, and (4) the desire to support local farms and food producers.

Security Concerns

Tighter border security, especially with the US, has a dampening effect on the demand for cross-border travel. US concerns over biosecurity is also translating into tighter scrutiny of any food products brought into the US, particularly by Americans returning from a trip to Canada and who might have wishes to bring a Canadian food product such as fruit, cheese, or meat back home with them.

In recent years, one of the fastest growing international markets for Canadian tourism has been Mexico. However, new visa policies regarding potential Mexican visitors to Canada will have a dampening effect on the future growth of this market,

Growing Competition

Tourism has long been a globally competitive sector, but the intensity of competition continues to grow among most destinations. Canada continues to lose market share due to underfunding of international tourism marketing initiatives by the CTC, and aggressive marketing campaigns by Canada's key competitors, including Europe and sun destinations. The expansion of low-cost carriers will increase demand for short-haul travel, particularly out-of-Canada and by the US market.

Social media and the internet, such as TripAdvisor, cater to a more discriminating consumer who readily shares critiques and reviews on-line. The Ministry of Tourism and Culture is only now beginning to recognize the power of social media for tourism marketing – a fact that many of our competitors have already understood.

DOMESTIC INFLUENCES

Ontario Tourism Outlook

According to the Ministry of Tourism and Culture's (MTC) *Ontario Tourism Outlook, Spring 2010*, a number of factors point to an improved outlook for Ontario's tourism industry between 2011 and 2014 including:

- An increase in Ontarians' personal disposable income. (Ontario's largest tourism market is domestic)
- A rebound in business investment that translates into increased travel expenditures
- A gradual economic recovery across North America over this time frame leading to more potential travel and tourism.

Local Infrastructure

The availability of quality accommodations, road signage, car parks and other infrastructure will influence consumers' decisions to take advantage of the culinary offerings of various regions. While some regions have an adequate supply of these key facilities, others do not.

Profitability and Return on Investment

Culinary tourism is characterised by some as a niche market and is dominated largely by small and medium-sized businesses. Profit margins for many in the hospitality and the food and beverage industry are considered marginal at best by some and there is little research on the return-on-investment (ROI) culinary tourism offers. This information is vital importance to attracting interest in developing culinary tourism entrepreneurship.



RESEARCH – CULINARY TOURISM AS A MOTIVATOR

Travel Activity and Motivation Study (TAMS) – 2006

TAMS-2006 is an examination of the recreational activities and travel habits of Canadians and Americans. It examines out-of-town, overnight travel behaviour of one or more nights over the past two years and provides detailed information on travelers' activities, travel motivators, places visited, type of accommodation used, impressions of Canada, its provinces and territories, demographics, and media consumption patterns.

It provides an extensive database that marketers, product designers, and academics can use to develop strategies and travel products to attract visitors to Canada. In particular, TAMS was designed to:

- Identify existing and potential tourism markets
- Measure the likelihood of these tourism markets being attracted to vacation experiences in Canada
- Create packaging opportunities for each of these markets
- Determine how to reach these markets in terms of media strategies
- Provide information on how to fine-tune and target existing marketing campaigns.

Culinary-related activities covered in the survey are:

- Aboriginal cuisine
- Farmer' markets
- Food/drink festivals
- Cooking/wine-tasting courses
- Harvesting or other farm operations
- Dining at restaurants featuring local ingredients or recipes
- Dining at high-end restaurants with an international reputation
- Dining at other high-end restaurants
- Going to local cafés
- Dining at a farm
- Shopping or browsing gourmet foods in retail stores
- Day visits and tasting at wineries
- Day visits and tastings at breweries
- Fruit –picking at farms or open fields
- Visiting food processing plants.

TAMS asks each respondent whether or not they participated in any of these (and other) events in the past two years and, if so, whether the activity was the primary reason for taking the trip

The survey was conducted in Canada and the US between January 2006 and June 2006 of adults (18 years and over). The reference period for the data is 2004 and 2005. The Canadian data base contains results from 31,699 completed questionnaires. The data are weighted to project the results to the Canadian population.

Two culinary tourism-related reports based on Canadian profiles were released. The most relevant one is a series of profiles of persons who participated in wine, beer, or food tastings while on a trip and compares them with other Canadian pleasure travelers. A second report on agri-tourism was also produced. This study profiled Canadians engaged in agri-tourism activities during an overnight visit, including going to an entertainment farm, a pick-your-own farm, or farm-based dining.

Regional reports for Windsor-Essex County, Niagara Region, and Georgian Bay were also produced. The first two of these reports contain information on culinary tourism activities and opportunities in those regions.

TAMS data are related to overnight out-of-town trips within the past two years. While some general information is provided on the province or other destination region visited, TAMS data cannot be tied to specific trips or specific destinations – a serious limitation in the data set.

The top-ten food related activities for Canadians were:

Activity	Percent reporting participation
Dining at restaurants featuring local foods	57.9
Going to local cafés	40.9
Dining at high-end restaurants	20.9
Dining at restaurants with international reputations	19.9
Shopping or browsing at gourmet/kitchen stores	11.5
Day visits and tasting at wineries	11.5
Day visits and tasting at wineries	7.0
Attending food/drink festivals	6.9
Dining at a farm	4.8
Attending cooking or wine course	4.4

Culinary tourism segments based on TAMS profiles (statistically defined based on reported participation patterns)

Segment	Typical activities	Relative size - % (out of 9.8 million Ontario residents) %
Dining	<ul style="list-style-type: none"> • High-end restaurants • Restaurants featuring local ingredients • Cafés 	40.2
Celebrating	<ul style="list-style-type: none"> • Food festivals 	24.6
Sampling	<ul style="list-style-type: none"> • Day visits and tasting at wineries • Day visits and tastings at breweries 	16.4
Rural experiences	<ul style="list-style-type: none"> • Farmers’ markets • Farm-gates sales • Pick-your-own operations 	12.9
Learning	<ul style="list-style-type: none"> • Cooking or wine courses 	5.7

Culinary tourist profiles (for residents of Ontario or visitors to Ontario destinations)

Income

Culinary participants are more likely to be affluent than other Ontarians:

Household income	Participants in any culinary activity %	Participants in no culinary activity %
<\$20K	3.7	7.8
\$20 – 39.9K	9.0	16.4
\$40 – 59.9K	13.6	16.5
\$60 – 79.9K	14.9	14.1
\$80 – 99.9K	12.3	12.0
≥\$100K	35.1	17.6
Not stated	11.4	15.5

Participation in other activities

Culinary participants are more active than other Ontarians. The following are some examples of relative participation rates.

Activity	Participants in any culinary activity %	Participants in no culinary activity %
Visiting historic sites	51.2	19.4
Swimming in lakes	47.9	25.7
Attending live theatre	32.3	11.7
Visiting gardens	25.4	7.7
Golfing	23.7	11.7
Going to a music festival	13.7	3.9
Going to spa	18.1	3.8

Life attitudes

Culinary participants are upbeat and interested in many things.

Life attitudes	Participants in any culinary activity %	Participants in no culinary activity %
Lots of energy for my age	41.7	32.1
Like to discover new places	32.6	25.5
Be physically active	29.8	19.4
Feel in control of my life	37.1	32.5
First to buy new products	18.7	12.5
Make decisions easily	42.1	34.8

Volume and Value of Culinary Tourism in Ontario

The Tourism Association of America has proposed three segments of culinary tourists: Deliberate culinary tourists (those people who engage in culinary experiences as a primary motivation for taking a trip), opportunistic culinary tourists (those who take the opportunity to enjoy a culinary experience during a trip made for other purposes, but for which cuisine is not a primary motive for the trip), and accidental culinary tourists who take enjoy an unexpected culinary experience if it is brought to their attention during a trip).

Utilizing the TAMS data, combined with the Travel Survey of Residents of Canada (2006), it is possible to estimate the relative sizes and spending of these three segments of culinary tourists.

Deliberate culinary tourists accounted for 15.2 percent of all Ontario-destination trips, generating \$816.0 million of total trip-related expenditures.

Opportunistic and accidental culinary tourists generated an additional 17.8 per cent of all Ontario destination trips, with a total expenditure of \$954.7 million. This expenditure represents all spending on the trips made by opportunistic and accidental culinary tourists, not just culinary tourism-related activities. Thus the estimate greatly inflates actual culinary spending. Existing data sources do not permit prorating of this among to culinary-specific activities and spending.

Tourism Regional Economic Impact Model

The province of Ontario is fortunate in having an on-line, do-it-yourself economic impact model, the Tourism Regional economic Impact Model, (TREIM) operated by the Ministry of Tourism and Culture and available on the ministry's website (<http://www.mtc.gov.on.ca/en/research/treim/treim.shtml>).

The model is based on an input-output model of the Canadian economy, updated annually. It can be used to estimate the economic impact of specific tourism events, the impacts of business operations by tourism industry sector, or the impact of a capital project for a given region in Ontario. It produces the following:

- Estimates of the direct, indirect and induced impacts of tourism-related activities on Gross Domestic Product
- Estimates of the direct, indirect, and induced impacts of tourism-related activities on labour income and employment
- Estimates of the direct and total impacts of tourism-related activities on federal, provincial, and municipal tax revenues.

TREIM is a versatile tool capable of providing tourism-related economic impact analysis for various user-selected geographies: 49 Census Divisions in Ontario, 14 Census Metropolitan Areas/Census Agglomerations, 12 Travel Regions, or the entire province. The model can be used to estimate the economic impact of specific tourism events, the impacts of business operations by tourism industry sector, or the impact of capital project for the chosen region.

The model is a multi-regional input-output model. It differs from a standard input-output model in several respects. The first is its treatment of time. Input-output models are static – that is, their results are independent of the date of the shock. TREIM, however, explicitly adjusts the model for changes in prices and labour productivity for the year chosen for the simulation. The model provides users with the ability to choose to conduct analysis for an event in the past, the present, or several years into the future. The impact results are reported in nominal dollars of the year in which the event takes place.

The second difference between TREIM and standard input-output models is its treatment of income earned by households and businesses. Direct and indirect activity by businesses provides income for workers and generates profits. The re-spending of this income by workers yields what is referred to as the induced impact. Users can choose to either include or exclude the impact from household spending of their income or from business spending on new capital. TREIM includes a model to estimate these induced impacts that takes into account the state of the economy at the time of the shock in terms of interest rates, the exchange rate, inflation, and economic growth.

With respect to culinary tourism, TREIM could be used to estimate the economic impacts of:

1. A culinary festival
2. The development/construction of a culinary facility such as a restaurant or farmers' market
3. The operation of a culinary business such as restaurant or farmers' market.

The utility of the results ultimately depend on the quality of data available, such as estimates of visitor spending. The model can work with estimates and provincial averages related to cross-spending (such as on transportation or accommodation), but such estimates limit the reliability and accuracy of the economic impact results.



STAKEHOLDER VIEWS

OCTA Membership Survey

In November 2010, OCTA surveyed its member organizations about the perceived challenges and future for the Ontario culinary tourism sector. The response rate of close to 50 percent is indicative of a highly-engaged membership.

Highlights of the findings are as follows:

Most Desired Outcome

- 100 per cent of responding organizations want culinary tourism to be included as part of their local RTO business strategy.

Challenges Cited

- Lack of stable funding and resources to develop culinary tourism products in each region (most commonly cited)
- Other attractors seen as the priority
- Distribution channels for local food products
- Lack of organization and clear roles between different groups
- Lack of education among partners and producers
- Lack of strong leadership in region
- Need to engage agriculture
- Lack of signage
- Lack of product development and consistent delivery of products.

Authenticity and Unique Regional Products

- 100 per cent of respondents stated they have a distinctive food product, food event and/or food destination in their region that could be considered authentically 'local.'

Economic Benefits of Culinary Tourism

- 92 percent of respondents feel culinary tourism is considered a priority sector that contributes to the economic and community development of their region.

Type of Assistance Desired from OCTA to Ensure Culinary Tourism is Incorporated into the RTO Strategic Plans

- A broad provincial plan that incorporates and promotes culinary tourism
- Proper representation on RTOs – “true players instead of quasi political or organizational talking heads”
- Information on how to work with local RTOs
- Product development strategy and funding to move culinary tourism forward
- A strategy for road signage
- Education and research including ROI information to convince partners and diagnostic assessment tools
- Sharing of best practices.

RTO Survey

In November 2010, OCTA surveyed representatives of RTO transition teams and those that had been formally incorporated to determine the level of interest in developing culinary tourism products for their region as part of their business plans. While many expressed an interest in the culinary tourism sector, most were hesitant to commit to product development in this area as they had not yet begun their strategic business planning process. However, since then, RTO5 and RTO 9 have contracted OCTA to assist with Phase One of the culinary tourism product development cycle. OCTA has also assisted RTO1 on the development of their culinary tourism guide.

Ministry of Tourism and Culture

MTC has expressed interest in developing culinary tourism throughout the province, recognizing that some regions are better positioned with market-ready products than others. In the Fall of 2010, MTC commissioned OCTA to develop a four-year Culinary Tourism Strategy and Action Plan to reflect its new focus on regional tourism and the establishment of RTOs. In particular, MTC hopes to see RTO5 (Toronto, Brampton & Mississauga) create a more-integrated and strategic approach to culinary tourism product development.

OMAFRA Interest and Request

OMAFRA has stated that it wants to provide value-add opportunities to farmers and primary producers by promoting culinary tourism as part of the agriculture value chain. OMAFRA also invited OCTA to develop a plan to partner with the ministry and expand its Foodland Ontario initiative. OCTA subsequently forwarded a proposal which is now on hold while OMAFRA completes an audit of its programming.

STATUS OF CULINARY TOURISM WITHIN RTOs

At the time of completing this report, only two of the 13 RTOs have been incorporated and five do not yet have Boards of Directors or Chairs. RTOs and/or Transition Teams have a deadline of March 31, 2011 to submit their Strategic Business Plans for 2011-2012. MTC has received only one or two at the time of this writing.

While most RTOs have not yet identified their priority product clusters, culinary tourism was identified as having good potential in the Premier Ranked Tourism Destination Frameworks (PRTDF) completed in areas across the province between 2003 and 2008. Those areas include Windsor/Essex/Pelee Island and Haldimand/Norfolk/Elgin (RTO1) Niagara Region (RTO2), Toronto and Brampton (RTO5), Durham Region (RTO6) Bruce County (RTO7) Ottawa (RTO10), areas of RTO11, District of Muskoka (RTO12) and North of Superior and Sudbury (RTO13).

In March 2011, OCTA was contracted by RTO5 to begin work with the region on the culinary tourism product development cycle. OCTA has issued a Culinary Tourism Product Development brief to each of the RTOs and has been receiving favourable response.

In the absence of the RTO Strategic Business Plans 2011-2012 completion at this time, the premise of the 2011 - 2015 OCTA Strategy and Action Plan assumes a focus on supporting each of the RTOs in product development.

Mapping Culinary Tourism Within Each RTO

To assist the RTOs with clearer understanding of what is currently being offered within their region, OCTA has been working with Ryerson University on an interactive culinary tourism map of Ontario. This mapping exercise includes plotting over 20 categories of culinary tourism - related inventories within each RTO.

Every tourism region of the world provides diverse and unique opportunities for visitors. What makes them unique is the combination of natural resources and the human impact that differentiates their appeal from competing destinations. The Ontario Ministry of Tourism and Culture has done this in Ontario by dividing the province into thirteen RTOs. Although there is some data available on those regions, it is not complete. Therefore OCTA has contracted a group of Ryerson students under their own company, GCA (Geographic Consulting Association) who will essentially collect, and complete the data for further and complete analysis.

The purpose of this project is the creation of a spatially referenced inventory of Ontario's culinary assets that will enable OCTA to develop appropriate strategies within each of the thirteen RTOs. As a result, OCTA will be able to assess the impact of individual industry sectors on culinary tourism along various supply chains.

As defined by this project, a supply chain involves moving a system of organizations, people, technology, information and resources related to culinary activities and bringing them to the consumer. Although supply chains may have done their individual inventories (i.e. the wine and cheese industry have inventories of wine and cheeses in Ontario), their needs are specific to their own objectives, which may not necessarily distinguish regions (i.e. a region which is rich in both wine and cheese).

Therefore GCA will cluster the various supply chains and link specific supply chains within one region, as opposed to keeping them separate the way they are currently. Having culinary clusters identified throughout the thirteen regions will allow potential culinary trails to emerge in areas where they currently do not exist.

The final product will result in a model map of culinary activities complete with culinary clusters and trails in Ontario that could potentially be updated annually. Although this seem to be a fairly simple process of inventory development and mapping, it is much more complex. Essentially the end result will aid in providing a provincial culinary tourism marketing strategy, communication plan, and the development of a unique value proposition.

RTO boundaries of Ontario will essentially be collected, completed and analyzed using various methods including that of Geographic Information Systems (GIS). OCTA has asked that this interactive culinary tourism map of Ontario include the following:

- An interactive map of culinary tourism related activities and product currently available in Ontario, which can be updated annually.
- An analysis of the geographic distribution and attributes of inventory to define associated patterns and trends. This will also provide some level of predictability' or coincidence of agriculture production and culinary tourism.
- Determine an appropriate route exists for the creation of a culinary tourism trail connecting the activities and culinary experience within the regions.
- Identification and analysis of the level of culinary tourism occurring within the regions followed by an in-depth analysis at the regional and provincial boundaries (micro vs. macro level).

The expectation is that this culinary tourism map of Ontario will be available to the RTOs, by OCTA , within months of the issue of this report and will be used to support each of the RTOs in aligning culinary tourism products with each RTO strategy.

" A data-driven led business development strategy led by a best practices team recognising local and regional characteristics while formulating an integrated product development and marketing program over the years will contribute to Ontario as having recognizable 'terroir.'"

Eugene Zakreski, Chair of OCTA , 2011

OCTA CAPACITY

As the organizations tasked to deliver on the goals and objectives of the initial 10-Year strategy and action plan, OCTA has become an acknowledged leader in culinary tourism. As such, an OCTA staff component of two is facing growing demands for speaking engagements, workshops, media interviews, communications and interface with its membership.

The organization's two funded positions – an Executive Director and Operations Manager – also face growing requests from government ministries and departments as well as the media for special events such as the Olympics, Pan Am Games, International Writers' Mission and so on. There are growing requirements to support the new RTOs, provide expertise and support for specific destinations, provide workshops to communities of interest, speak, on behalf of the province, on a National and International stage and, from an operational perspective, continue to seek funds to build an organization to meet the needs of members.

There is a clear need to build OCTA's capacity by developing a new organizational model and ensuring its financial sustainability in order to deliver on the initial 10-Year Strategy and support the province's new regional focus and the goal of the Ontario Tourism Competitiveness Study. Working with a voluntary board, this includes investing time and resources to create a framework for action and good governance.

It is important to note that OCTA is preparing its own four- year strategy and action plan to align with the strategies and action plans outlined in the second half of this report.



SWOT ANALYSIS

"Getting Ontarians and travellers to our province to enjoy the experiences available in all of the regions of Ontario and having their regional hosts feel proud and vocal about their uniqueness will help them develop their own food culture rather than accept a cultural homogeneity."

Jamie Kennedy, Chef, Founding Member of Culinary Tourism Advisory Council 2005

In formulating a strategy and action plan it is important to identify culinary tourism in relationship to the current environment and factors that could influence its future. The following SWOT analysis will help inform the strategies and actions required to ensure success.

Strengths

- Diverse array of product potential in all regions of the province
- Growing number of food-related festivals and events
- Strength and momentum of some destinations in preparing market-ready products including Ottawa, Stratford-Perth, Prince Edward County, Toronto, Muskoka and Norfolk County
- OCTA's provincial, national and international reputation as a dynamic, professional, knowledge-based organization
- Ontario's status as a four-season destination (culinary tourism can attract shoulder season visitors)
- Interest of post-secondary educational institutions in many aspects of culinary tourism
- Growing interest in developing culinary tourism product among RTOs
- Continued consumer interest in food and drink.

Weaknesses

- OCTA capacity to meet growing demands and capitalize on opportunities
- No sustainable funding for culinary tourism organizations and OCTA operations
- Lack of leadership in culinary tourism in some regions/destinations
- Lack of quality assurance measures, culinary tourism performance/success indicators
- Lack of culinary product inventory in many destinations and regions
- No Return-on-Investment (ROI) measures
- Tactical rather than strategic approach to culinary tourism development in many destinations and regions.

"By working toward better coordination at the regional level and designing incentives locally, each region could offer something distinctive - culinary tourism product development in Ontario could act as a lever to reinvigorate the leadership needed to make the RTOs successful"

Linda Bramble, Writer and Wine Editor and Contributor to the 2005-2015 Culinary Tourism Strategy for Ontario

Opportunities

- Opportunity to develop culinary tourism as a high-potential “niche” market as identified in Ontario Tourism Competiveness Study
- Opportunity to support newly-created RTOs, Economic Development Departments and others with culinary tourism product development expertise
- Opportunity to develop a Culinary Centre of Excellence within OCTA to provide RTOs, regions and other organizations beyond Ontario with product development expertise and research
- Opportunity for food and drink experiences to become part of the story depicting the uniqueness of Ontario’s regions
- Opportunity to develop culinary tourism as a key economic driver for local communities and the province
- Opportunity for stronger links with OMAFRA for marketing under Foodland Ontario brand as discussed with the ministry
- Opportunity to develop quality standards for culinary tourism
- Opportunity to contribute to major events such as PanAm Games, 2015
- Opportunity to grow culinary tourism through development of all inclusive packages (Provincial announcement, February 2011)
- Opportunity to position Ontario as a culinary tourism destination for international travellers, particularly China
- Opportunity to support consumer and tourist demand for local foods
- Opportunity to increase overnight visits with culinary tourism through packaging with culinary tourism products.

Threats

- Strength of Canadian dollar could dampen travel plans of US travellers and make international travel more appealing to domestic tourists
- Rising oil/gasoline prices
- Rising food and beverage commodity prices
- U.S. security concerns including border and biosecurity
- Intensified competition and aggressive marketing by competitive destinations
- Loss of OCTA as a leader in the advancement of Ontario's culinary tourism will erode much of the momentum of the culinary tourism gained over past five years.
- Fragmentation of ministries involved in some aspect of economic development, culinary tourism and agri-tourism
- RTOs may not recognize the value of culinary tourism and put focus of funding and product development elsewhere.
- Municipal and county budget cuts that threaten the jobs of some in positions of leading and coordinating culinary tourism initiatives, e.g. Norfolk County.

"The size of the province and the very nature of the fractured industry is just one of the reasons communication is paramount - the entire supply chain and each of the stakeholders needs to work together toward one common goal: ensure the new RTOs mesh with the existing culinary regions of Ontario."

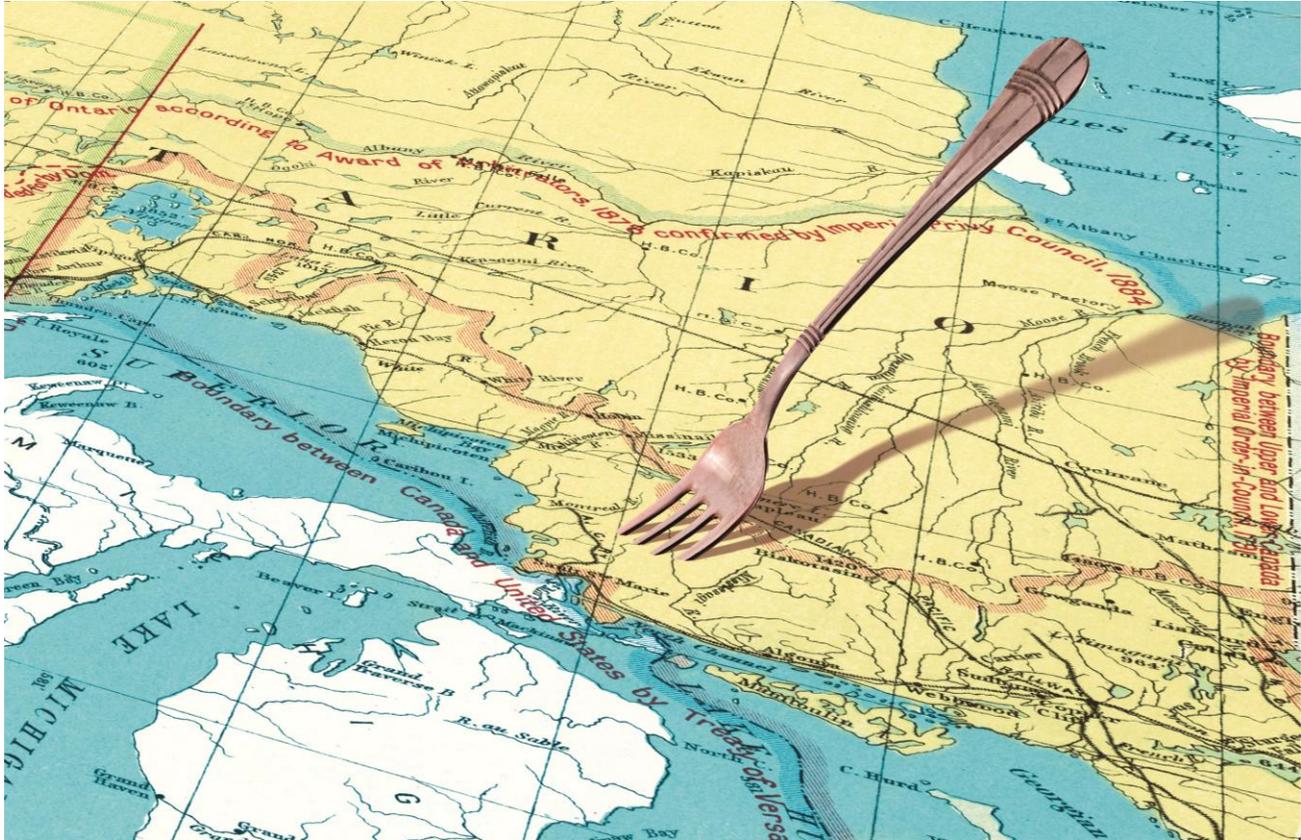
Anita Stewart, Culinary Activist, Author and Contributors to the 2005-2015 Culinary Tourism Strategy for Ontario

CULINARY TOURISM IN ONTARIO



STRATEGY AND ACTION PLAN 2005 — 2015

THE FOUR-YEAR CULINARY TOURISM STRATEGY AND ACTION PLAN



Fork in the Road

At this point of the 10-Year journey toward a sustainable culinary tourism sector in Ontario, the province has reached a fork in the road. As the famous ballplayer Yogi Berra once advised, “When you come to a fork in the road, take it.”

With the new regional focus on tourism and the creation of 13 RTOs to deliver on the recommendations of the Ontario Tourism Competitiveness Study, the time is ripe to assess and realign the original culinary tourism strategy and action plan to ensure it supports the regional strategies and contributes to the provincial tourism revenue target.

A Framework for Action

This Four-Year Strategy and Action Plan will help to create a viable and sustainable culinary tourism sector in Ontario by addressing a number of key imperatives and opportunities identified by stakeholders.

The overall focus of the Strategy is on increasing the value and quality of the culinary tourism experience for tourists to Ontario while contributing to the economic, social, cultural aspects of Ontario.

Each of the following desired outcomes is accompanied by sub-strategies and actions needed to achieve them.

Outcome One

Ontario has strong leadership and a sustainable organization to advance culinary tourism within the Regional Tourism Organizations.

Culinary tourism has taken root in Ontario over the past five years.

This is the result in part to the commitment by MTC to develop the sector; the leadership and expertise and knowledge-transfer provided by OCTA and the ever-growing interest by Ontario communities and regions to develop their culinary tourism potential.

While OCTA continues to deliver on the 10-Year Culinary Tourism Strategy and Action Plan on behalf of the provincial government, the organization has limited staffing and funding resources to meet the growing demands.

There is a need to ensure the sustainability of OCTA to keep up the momentum, particularly now as RTOs begin to express interest in engaging OCTA in developing culinary tourism products which will help them meet the goal of the Competitiveness Study.

Strategy:

Support and ensure the sustainability of OCTA.

Actions:

1. Support OCTA with the development of a diverse revenue model that includes:
 - Membership fees
 - Operational funding support through matching funding with RTOs for product development funding
 - Support the creation of OCTA as a **Culinary Centre of Excellence** offering expertise and services including research; product development; social media and communications support; educational resource development such as tool kits; speaker's bureau and high profile, fee-for-service events – with operational funding.
 - Revenues associated with provincial branding
 - Website advertising revenues.
2. Encourage RTOs to become members of OCTA.
3. Provide input and senior-level participation on OCTA's Advisory Board.

Outcome Two

Ontario has an increased number of market-ready culinary tourism products aligned with the Regional Tourism Organizations.

High quality, market-ready tourism products that are authentic and unique and tell the regional story will help to attract visitors looking for rich culinary experiences.

The key is to deliver consistent, high-quality products that showcase Ontario's great diversity of people, foods, regions and experiences and provide value for money.

Providing these quality culinary experiences is central to building Ontario's reputation as a world-class destination and to achieving the vision of this strategy.

Strategy:

Work with RTOs to identify and develop market-ready culinary tourism products.

Actions:

1. Create an RTO product development working committee comprised of representatives of each RTO and OCTA and invite representation from MTC, OMAFRA and any other ministries.
2. Gather existing regional inventories of culinary tourism products in Ontario (from 10-Year strategy) to support ongoing updates to Culinary Tourism Map of Ontario.
3. Gather inventories of culinary-tourism products from other ministries such as OMAFRA.
4. Support the development of an ROI tool, by OCTA, to demonstrate the value proposition of developing and/or packaging quality culinary tourism products.
5. Develop incentives for the development of high quality culinary tourism products.
6. Identify RTOs with greatest market-ready potential to develop culinary tourism products.
7. Align product development to key motivators attracting visitors to specific regions. The following examples illustrate the success of doing so:
 - Two of the most popular activities of visitors in Ontario, especially on same-day trips, are eating and shopping. Same-day visits constitute the bulk of visitor travel in Ontario. Although per-trip expenditures are modest, the sheer number of same-day visits can make this segment worthy of consideration.

Visitors are also influenced by the designation of themed, self-drive routes. A Butter Tart Trail in Wellington County was formed by a group of tourism stakeholders after they did a visioning session and an asset mapping exercise. Through this process, they discovered they had a number of 'scratch' bakeries in the area and on on-farm sheep and goat dairies with cheese shops. The township, located within an hour's drive of Toronto, had the potential as a day-trip destination. A featuring local bakeries as well as cheese shops produced in 2006 continues today. One bakery estimates that the trail is responsible for 30 per cent of its annual business.

- Recognizing the increasing demand for experiential travel, including cultural experiences broadly defined, and the need by the City of Stratford to broaden its product offerings, Destination Stratford has been exploring the development of new experiences that take the city beyond its traditional reliance on the Shakespearean Festival.

Working with a strategic partner, the Stratford Chefs' School, the city is now into its third year of promoting a Culinary Camp. Participants are introduced to the School's program which gives them a glimpse into the world of cooking in real kitchens with working chefs. Under the guidance of six chefs, students make recipes drawn from the School's actual first-and-second-year curriculum.

8. Support OCTA in creating a product development process and planning model to be used with RTOs and organizations interested in product development.

"The Ministries of Tourism and Culture, OMAFRA and Economic Development need to embed the value of culinary - tourism as a major component and an attraction of our regional and provincial economies and in understanding that it is instrumental in becoming the bedrock for meaningful real life-long careers and employment. We tend to forget that culinary-tourism is a major factor in the balance of payments that significantly contribute to the provincial economy."

J. Charles Grieco, CEO, Ontario Hostelry Institute, contributor to the 2005-2015 Culinary Tourism Strategy and Action Plan and one of the founding members of the Culinary Tourism Advisory Councils 2005

Outcome Three

Ontario has consistent quality culinary tourism products that showcase the regions of Ontario.

Visitors' opinions about their experiences shape their future plans and ultimately influence the tourism success of destinations. Enhanced research will contribute to improving the quality of the experience and relevant performance indicators will inform us of how well we are meeting visitors' expectations. It is time to raise the bar for culinary tourism products to ensure they meet and exceed expectations and contribute to the growth of the industry as a whole.

Strategy:

Enhance culinary tourism research and develop quality standards.

Actions:

- 1.** Create partnerships with standards and verification programs to develop and deliver culinary tourism standards and verification programs that can be easily adopted by RTOs, destinations and marketing groups such as tour operators.
- 2.** Partner with post-secondary institutions to promote a network of centres of research excellence in culinary tourism.
 - Many economic sectors in Ontario recognize the importance of partnering with post-secondary institutions to promote and benefit from applied research. Biotechnology, information technology, advanced manufacturing, advanced and construction, and more have established research partnerships with post-secondary institutions. Tourism generally, and culinary tourism in particular, have failed to do so.
 - As a result, Ontario culinary tourism lacks access to independent strategic and applied research on product development, market trends, global competition, policy development, planning, strategic alliances, precise and updated information on the importance of culinary tourism in the Ontario economy, and more. Both the provincial and federal governments recognize that investment in research is key to the long-term health of the Ontario economy and have invested heavily in networks of research excellence. OCTA could play a vital role in collecting and disseminating this critical information – as play a major role in product development support with the RTOs.

Outcome Four

Ontario has a greater recognition of culinary tourism as a market and economic driver for the province, within the Regional Tourism Organizations (RTOs) and among stakeholders.

Food and beverage represents 14 per cent of visitor's spending in Ontario, out of total visitor spending of \$13.127 billion. If this spending is increased even by just one percent, it represents a significant contribution to tourism receipts (2007 *Travel Survey of Residents of Canada*, Statistics Canada).

The more understanding there is about the contributions culinary tourism makes, the more inclined organizations will be to integrate culinary tourism products into the regional tourism mix as a way to tell their unique story.

Strategy:

Enhanced communications and information sharing

Actions:

1. Encourage an "all-of-government" approach to promote the economic benefits of the culinary supply chain that crosses many ministries and their jurisdictions.
2. Through OCTA, develop annual communications and marketing plan to increase awareness and provide updated information to stakeholders.
3. Through OCTA, develop information tools for destinations, RTOs and other stakeholders underlining the economic significance of culinary tourism.
4. Encourage the enhancement of OCTA's website and interactivity with new Apps and linkages to applicable business sites.
5. Create an online digital culinary tourism map of Ontario demonstrating the breadth and depth of culinary experiences and spinoffs.
6. Work with media to highlight the significance of the culinary tourism sector in the province.
7. Work with OTMPC's media relations department to ensure that culinary tourism is a part of every media experience in the province.
8. Create a format for the development of a calendar of urban and rural culinary experiences across the province.

9. Encourage operators to submit stories of their experiences and learnings about culinary tourism for distribution to media and stakeholders.
10. Research and write a workbook of best practices in culinary tourism and distribute to stakeholders.
11. Through OCTA, host a provincial and international travel food mission to showcase Ontario's diverse culinary tourism products and experiences.
12. Through OCTA, develop a series of 'fam' tours and promotional packages that can be used to encourage tour operators and marketers to include Ontario as a culinary tourism destination of choice.

"Support media attention to local, artisanal food producers, preparers and purveyors: create demand and create awareness about high value food experiences."

Malcolm Jolley, Managing Editor of Good Food Revolution and Executive Director of Good Food Media



Outcome Five

Ontario has a province-wide culinary tourism brand and product & guidelines.

While Ontario has an array of regional and community-based culinary tourism products and brands, there is an opportunity to create an overarching brand for consistent use on promotional products to give greater profile to the diverse culinary tourism experiences Ontario offers visitors. For example, "Ontario – there's no place like this... for Food" or Ontario's Foodland – Yours to Discover." The Savour Ontario Dining Program currently in use is exclusive to fine dining establishments.

Critical to the success of the RTO strategies is to embrace a successful brand identity that integrates unique regional characteristics and products with an over-arching provincial feel to give greater profile to Ontario's food experiences to visitors – both domestic and otherwise.

Strategy:

Partner with the Ontario Tourism Marketing Partnership Corporation (OTMPC), OMAFRA and other tourism and food-focused associations to explore opportunities.

Actions:

1. Meet with OTMPC to look for areas of collaboration in existing a new opportunities.
2. Work with the RTOs to create a brand identity that incorporates culinary tourism as one of the associated strengths of a region and the province.
3. Work with OMAFRA to look for opportunities to create a brand that incorporates the characteristics of their existing brand with a culinary tourism message.
4. Explore other food-focussed associations where a culinary tourism message or visual would bring to life their own brand identity.

"Co-branding or creating a common brand that speaks to the attraction of food and wine, and invites tourists to Ontario would be one of the most powerful initiatives the province could undertake. By coordinating various ministries to create greater awareness of the unique flavours of our food and wines available in Ontario, visitors would get a better 'education' and understanding of our land. If you look at what Jamie Oliver has been able to do in the UK, Jamie Kennedy and other great Ontarian Chefs could not only educate tourists but educate citizens."

Donald Ziraldo, Chairman, Canadian Research and Innovation Centre @ Vineland

Outcome Six

Ontario has an understanding of culinary tourism as a tourism motivator.

Currently there are no direct mechanisms to measure the impact of culinary tourism as a motivator for tourists to Ontario. In 2005, recommendations for questions for a variety of provincial surveys (TAMS and TRIEMS) were submitted to MTOUR. However they have not been included to date. In fact, the 2011 TAMS has been cancelled due to a lack of financial support from the Canadian Tourism Commission. A new survey "Consumer Insights" has been proposed by MTC that will likely have a few questions related to culinary tourism. However, funding for the survey has not been finalized nor has the list of activities to be covered.

By tracking culinary tourism, we will be able to better appreciate the needs of the market that will help to develop products and enhance existing tourism packages to meet those needs.

Strategy:

Regular and ongoing input to tourism surveys

Actions:

1. Work with researchers currently conducting tourism research – incorporate specific questions and focus to support culinary tourism e.g., Consumer Insight and others.
2. Engage and encourage human resource councils to share labour market research that may be of interest to members and stakeholders.
3. By working with three to four key tour operators, develop questions related to culinary tourism that could be included in visitor surveys.
4. Dedicate one week or month annually during which time Tourism Information Centre staff in each RTO query visitors about whether culinary tourism products motivate them. Encourage RTOs to engage their local Tourism Information Centres in this initiative.

"One of the most strategic actions needed is research. Funding support specifically targeting culinary tourism is critical to this sector; this sort of support has long been in place for sectors the province views as essential to Ontario's future and culinary tourism should be on that 'list'".

Stephen L. J. Smith, PhD, Professor University of Waterloo, Culinary Tourism Researcher and Contributor to the Culinary Tourism Strategy 2005-2015,

Outcome Seven

There are stronger linkages to the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) for a more coordinated and integrated promotion of local food and culinary tourism experiences.

Ontario's diverse array of agricultural and agri-food products offer great opportunities for both the expansion of the culinary tourism sector and the vitality of the agri-food community.

The province is in an enviable position of being able to deliver a wide menu of culinary ingredients that can contribute to a unique range of culinary products and experiences from the farm gate to the tourist's plate.

Strategy:

Formalize relationship with OMAFRA on programs such as Savour Ontario Dining Program and Foodland Ontario.

Actions:

1. Create an ADM working group within MTC and OMAFRA to share information, generate ideas and create opportunities for cross-pollination that benefit the agri-food value chain.
2. Explore use of provincial branding to be incorporated into culinary tourism packaging and products.
3. Create greater linkages with agricultural communities and organizations.



Outcome Eight

Ontario has a culinary tourism presence across each region of the province that is dedicated to continued improvement and the measurement of its performance.

As the adage goes, “What gets measured gets done.”

Currently there are no metrics for use across the province to measure the performance – including successes and weaknesses – of culinary tourism organizations, products and impacts.

Regular measurement will help to ensure quality assurance, inform decision making and replicate successes.

Strategy:

Development of a measurement tool that can be used by a variety of destinations, RTOS, individual enterprises to assess performance.

Actions:

1. Work with specialists in performance metrics to develop a Culinary Tourism Scorecard with performance indicators that can be tracked over time.
2. Widely promote and distribute the Culinary Tourism Scorecard and instructions to the RTOs and integrate its use in all new culinary tourism products and impact of culinary tourism in their region.
3. Before the end of the four-year strategy and action plan, evaluate the effectiveness of OCTA as a culinary tourism expert in supporting the RTOs.

"Developing good performance indicators will help us identify and solve issues quickly. Once we have developed KPIs[Key Performance Indicators] that are aligned with culinary tourism business goals, and once we track our performance regularly, we will be in a better position to manage our products, look for areas of improvement and create a province of best practices in culinary tourism."

Rebecca LeHeup, Executive Director, Ontario Culinary Tourism Alliance

Outcome Nine

Ontario has a vibrant and growing community of entrepreneurs within each region of the province successfully developing and delivering innovative culinary tourism experiences.

Culinary tourism is largely dominated by small and medium-sized businesses that frequently don't have the tools to assess new products or business opportunities. Many see themselves as manufacturers not as potential tourist destinations.

This community of entrepreneurs includes: artisanal producers, small businesses to expand their product offerings, restaurants, service providers, B&Bs and retailers.

Ontario has a tremendous opportunity to encourage entrepreneurship in the culinary sector, based on the successful model of the wine industry in Ontario.

Strategy:

Greater outreach and information sharing of success stories of entrepreneurs developing culinary tourism products

Actions:

1. Encourage foodservice establishments in provincial attractions to feature Ontario products, ingredients and beverages.
2. Encourage festivals and events sponsored by the government to feature Ontario products, ingredients and beverages as part of their food services offerings.
3. Establish links with appropriate ministries and their online and print publications to promote successful culinary tourism entrepreneurs.
4. Develop outreach program to related industry associations, food entrepreneurs and communities of interest to gather and disseminate information on successful ventures.
5. Encourage RTOs to highlight opportunities for food and beverage entrepreneurship and links to local food i.e., chef-farmer/producer "meet and greets."
6. Develop a Return on Investment (ROI) tool for potential entrepreneurs, destinations and RTOs.
7. Work with OMAFRA for opportunities to build incentives for local food procurement policies for large scale foodservice distributors.

CONCLUSION

From 2005 - 2010 culinary tourism has made a significant contribution to how we view and how we experience the rich and diverse lands and communities we call, Ontario.

As a direct result of the implementation of the Regional Tourism Organizations (RTOs) in the province and after five years of implementing the 10-Year Culinary Tourism Strategy and Action Plan, an opportunity to take stock, reflect on accomplishments and look for new ways to align this strategy with the new RTOs has prompted this report.

For culinary tourism organizations to work effectively with the RTOs for mutual benefit we need to make sure that:

- Culinary tourism is an active ingredient of the tourism product mix of each RTO through the involvement of OCTA in the planning and development of quality culinary tourism products in each of the RTOs over the next Four-Years.
- Regions and communities within them appreciate that culinary tourism can help preserve and promote their local culture and character .

None of this can happen without strong leadership and expertise and a commitment to advance culinary tourism throughout the province. The Ontario Culinary Tourism Alliance (OCTA) is well positioned to deliver the outcomes of this report, if appropriately resourced.

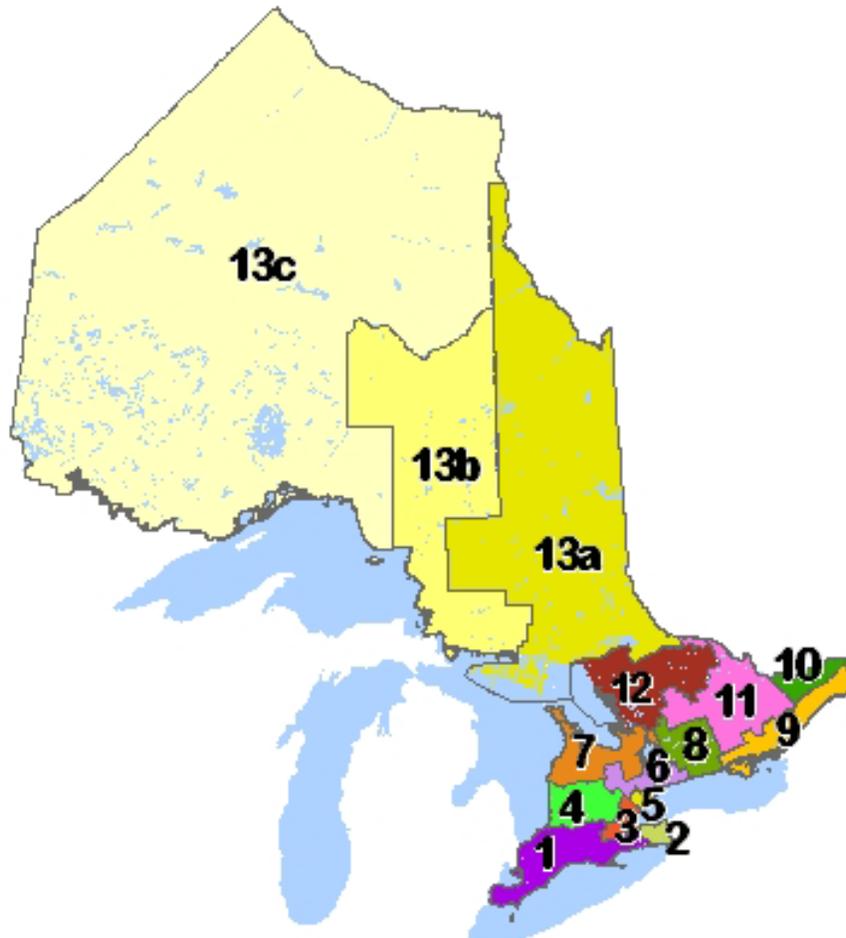
The success of this strategy also depends on a shared commitment by the province, the RTOs, culinary tourism organizations and communities of interest, to realize the great potential culinary tourism offers Ontario

Now, more than ever, is the time and opportunity to develop market-ready products that can truly make Ontario a “A Foodland to Discover.”

APPENDIX A

Regional Tourism Organizations map of Ontario

(<http://www.mtc.gov.on.ca/en/regions/regions.shtml>)



Region 1: Southwest Ontario

Region 2: Niagara Falls and Wine Country

Region 3: Hamilton, Halton and Brant

Region 4: Huron, Perth, Waterloo and Wellington

Region 5: Greater Toronto Area, Mississauga, Brampton

Region 6: York, Durham and Hills of Headwaters

Region 7: Bruce Peninsula, Southern Georgian Bay and Lake Simcoe

Region 8: Kawartha and Northumberland

Region 9: South Eastern Ontario

Region 10: Ottawa and Countryside

Region 11: Haliburton Highlands to the Ottawa Valley

Region 12: Muskoka, Parry Sound and Algonquin Park

Region 13: Northern Ontario

APPENDIX B

Culinary Tourism In Ontario - Accomplishments Against Original Goals and Objectives

The original Ten-year Strategy and Action plan listed the most pressing activities that needed to be accomplished. The following chart shows the status of all of the 'goals and objectives' and how many of these have been accomplished. (*Culinary Tourism in Ontario Strategy and Action Plan 2005 - 2015, pp 46 - 72*)

1. Leadership

Goal	Objectives	Status
Establish a provincial organization to support the implementation of the strategy and action plan.	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.	COMPLETED - The Ontario Culinary Tourism Alliance (OCTA) was created and launched in 2006.
	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	ONGOING - OCTA continues to work closely and strategically with regions, associations and government.
	To centralize information and make investment recommendations that will benefit stakeholders across the province	ONGOING - OCTA has created a centralized repository of information through their website that benefits all stakeholders www.ontarioculinary.com .
	To mobilize and direct working committees supporting the culinary tourism strategy and implementation process	COMPLETED and ongoing through the Culinary Tourism Advisory Board and the OCTA Board.

Leadership Action:

1.1 Call a Meeting of Industry Leaders and the Ministry of Tourism and Culture to Review the Strategy and Outline Steps to Create an action plan.

COMPLETION : 2006

1.2 Steering Committee to Create an 'office' of Culinary Tourism.

COMPLETION : 2006

1.3 Develop Working Committees Addressing Each of the 10 Goals and Objectives.

ONGOING : Working Committees include: Communication, Membership, Awards, Summit, Governance, Executive.

1.4 Align Activities With Regions and Communities Already Using the Premier Ranked Tourism Destination Framework

ONGOING: OCTA continues to work with 30+ industry groups, destinations, regions and communities.

1.5 Establish Direct Links to Other Provincial Networks

ONGOING: Links to OTMPC, OMA, ORHMA, OHI, Farmers' Markets Ontario, Ministries (MTC, MTC, OMAFRA), Local Food Plus, Canadian Tourism Commission, Sustain Ontario, Greater Toronto Area Agricultural Association.

The Ontario Culinary Tourism Strategy and Action Plan has been distributed in print (over 1,000 copies) and electronically to hundreds of businesses and associations within the value chain over the past 5 years

1.6 Establish Links to the Links of the Culinary Tourism Supply Chain

ONGOING: Monthly communication via newsletters, workshops and onsite visits to representatives of industry associations, food distributors, growers, processors, tour operators, farmers, markets, festival and event organizers.

2.0 MARKET-READY CULINARY TOURISM PRODUCTS

Goal	Objectives	Status
Develop market-ready regional culinary tourism products and partnerships	Develop a provincial culinary tourism marketing plan in conjunction with regional plans to focus on new, and enhancing existing, culinary tourism products.	ONGOING annual marketing plans have been completed within the annual OCTA business plans.
	Regions, MTC and other ministry partners to identify existing products and support the development of new regional culinary tourism products and partnerships.	ONGOING work being done with regions and MTC partners such as OMAFRA
	Gather information on existing (successful and unsuccessful) culinary tourism destinations and products.	ONGOING work with member organizations of OCTA
	Build a stronger value proposition for culinary tourism in Ontario.	ONGOING work - OCTA has played a major role showcasing culinary tourism in Ontario at province-wide, national and international events.
	Integrate culinary tourism strategy with Heritage, Agriculture, Regional Economic Development and destination marketing strategies.	ONGOING OCTA has sent communications to various ministries detailing its work and alignment with their strategies to initiate new partnerships.

Market-ready Culinary Tourism Products Actions

2.1 Establish a Working Committee Responsible for Culinary Tourism Product

PLANNED: OCTA has completed some product development - plans to create a practise area specializing in product development is part of the 2011-2015 OCTA Plan.

2.2 Outreach to Regions and Communities and National Organizations

ONGOING: OCTA continues to reach out to individual destinations, regions, communities and National Organizations to identify best practices, success criteria, research, product development - these can be found on the OCTA website. Work is currently underway with Ryerson University to create guides and culinary tourism mapping (3rd qtr 2011) and to research the state of culinary tourism in Canada.

2.3 Work with MTOUR and other Ministries and Government Agencies

COMPLETED and ONGOING Updates to ministries; participation of ministries at the Culinary Tourism Summits.

2.4 Create a Culinary Tourism Partnership Plan

COMPLETED and ONGOING as part of the annual OCTA Business Plans. Partnerships with businesses throughout the culinary tourism value chain can be found on the OCTA website.

3.0 RESEARCH AND PERFORMANCE INDICATORS

Goal	Objectives	Status
Invest in research and develop performance indicators	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.	<p>COMPLETED: In 2009 and 2010 applications were made and funding was granted to OCTA to support research in creating inventories of existing educational programs supporting culinary tourism. Other research funds were used to create culinary tourism toolkits to support product development in regions.</p> <p>ONGOING Creating performance Indicators, in partnership with educational institutions is part of the OCTA 2011/2012 strategic plans</p>

Research and Performance Indicators

3.1 Support Market Research Enhancements and the Gathering of Market Intelligence

ONGOING: OCTA continues to work with a number of post secondary research institutions while reviewing provincial and national studies such as TAMS and TRIEMS. This information informs OCTA and members on the trends, risks, opportunities when completing business plans, marketing and communication plans and, product development. All information gathered is available on the OCTA website.

3.2 Research /Communication

ONGOING: Any research information that OCTA receives or funds is available on the OCTA website.

3.3 Develop New Research Projects in Concert With Industry Needs

ONGOING: Organisations such as Sustain Ontario and research institutions such as Ryerson University have partnered with OCTA to produce research requested by industry. These reports are available on the OCTA website. Much more research is needed and, according to the original strategy, research in performance measures and the development of a Culinary Tourism scorecard is planned over the next four years.

3.4 Business Operation-Related Research

PLANNED: This necessary work has become part of the four year plan for OCTA based on funds that are being pursued through MTC and the Ontario Trillium Foundation.

4.0 EDUCATION AND TRAINING FOR INDUSTRY AND COLLEGES

Goal	Objectives	Status
Invest in education and training to develop programs and toolkits for industry	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.	<p>COMPLETED: In 2009 George Brown College completed the creation of the first post-diploma program in Canada which focussed on culinary tourism. The program is available online.</p> <p>COMPLETED In 2009 OCTA applied and received funds from the Ministry of Training, Colleges and Universities to take an inventory of all programs available in Ontario, Canada and internationally that could be used to support culinary tourism. The results were shared with the Heads of Hospitality and Tourism throughout Ontario.</p> <p>COMPLETED In 2009/2010 OCTA commissioned the creation of a culinary tourism toolkit available to industry members .</p>

Education and Training for Industry and Colleges Action

4.1 Working Committee of Colleges

ONGOING: OCTA continues to work with many post secondary institutions in an effort to raise awareness, present updates and encourage program development in Ontario. All Ontario colleges and universities with hospitality, tourism and culinary programs are members of OCTA. In addition OCTA has created opportunities within its organization to take student interns.

4.2 Educational Toolkits for Industry Stakeholders

COMPLETED: All toolkit programs are available to OCTA members. Additional toolkits will continue to populate the OCTA training inventory and be made available to industry stakeholders through OCTA membership or for a fee.

4.3 Program Rollouts and Ministry Approvals

ONGOING: By working with post secondary institutions, due process is used for any and all programs funded by the ministry. Seminars, workshops and training run by OCTA remain non-funded and therefore require no ministry approvals.

5. 0 DEVELOP A CULINARY TOURISM MARKETING PLAN

Goal	Objectives	Status
By working with OTMPC, the Ministry of Tourism and Culture and stakeholders, Ontario will have a marketing plan supporting culinary tourism	Work directly with OTMPC to work on a provincial marketing plan for culinary tourism.	ONGOING - Work with OTMPC has been successful over many years. OCTA has been part of the OTMPC Advisory Board.
	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.	COMPLETED - The annual OCTA business plans includes objectives to help the regions achieve their objectives.

Develop a Culinary Tourism Marketing Plan

5.1 Regional Plans - Assessment

ONGOING: To date all members regions and destinations of OCTA have input into the OCTA Tactical Plan and OCTA, when asked, provides input into their plans.

5.2 Identify Product Offerings

ONGOING: A complete mapping project is underway with Ryerson University to present a Culinary Tourism Map of Ontario. This will be available in the 3rd quarter of 2011 and may be used to support App developments for the province.

5.3 Develop Plans to Support Regions

ONGOING: The 2011 - 2015 Strategy will address how the regions of Ontario will be supported. To date 26 destinations/regions have been supported over the past five years.

5.4 Value Proposition for Culinary Tourism in Ontario

PLANNED: This will be an important part of the 2011 -2015 culinary tourism strategy and action plan - OCTA is reviewing possible links to tourism and agriculture.

5.5 Work With Operators, Regions and Communities Who Have or are Completing the Premier- Ranked Tourism Destination Framework

COMPLETED

5.6 Promote Market-Ready Products in Provincial Communication or Presentation Material

ONGOING: All available on the OCTA website

5.7 Develop Marketing and Promotional Materials

ONGOING: All available on the OCTA website and through the Culinary Tourism toolkits and workshops.

5.8 Consider Creating a Food and Wine Writers' Festival

PLANNED: Part of the 2011-2015 strategy and Action Plan of OCTA

6.0 DEVELOP QUALITY ASSURANCE

Goal	Objectives	Status
To have a quality assurance plan and strategy for the province of Ontario that can be filtered down to regional quality assurance programs	Quality standards must be put in place to support culinary tourism in Ontario.	PLANNED 2011 -2015 – OCTA is working in partnership with OMAFRA (Foodservice program) and Canadian Tourism Commission (CTC) (Signature Experience program).
	Create standards for culinary tourism products that meet industry standards and acceptance.	PLANNED 2011-2015 – OCTA is working in partnership with the CTC and industry stakeholders.
	Work directly with researchers to find benchmark studies and best practices.	PLANNED 2011 - 2015
	Create a model to get industry buy-in.	PLANNED 2011-2015

Quality Assurance

This area of "developing quality assurance" has yet to be advanced. There is much to do in this area and the feeling of OCTA and its membership is to look at other quality assurance criteria, standards and implementation processes over the next four years.

7.0 AWARDS AND RECOGNITION FOR INDUSTRY

Goal	Objectives	Status
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.	Recognition program put in place through industry awards programs such as those given out by TIAC, OHI and MTOUR.	COMPLETED: Two annual awards – finalists recognized at OCTA Summit, awards given out at OTMPC/TIAO Gala event; winners are also recognised at the OHI gala and through media advisories throughout Ontario and on the OCTA website.
	Promote operators, culinary professionals and those developing culinary tourism products that win awards.	COMPLETED: Annual award
	Provide incentive to all operators, regions and industry stakeholders with criteria for an awards program.	COMPLETED: Annual award

Awards

7.1 Working Committee to Create an Awards and Recognition Plan

COMPLETED: Organized through OCTA

7.2 Identify Hospitality and Tourism Associations That Provide Awards to Industry Stakeholders

COMPLETED: Organized through OCTA in partnership with OTMPC, TIAO and OHI

7.3 Define Criteria with Associations

COMPLETED: Organized through OCTA

7.4 Make Recommendations for Funds to Support These Awards

COMPLETED: Organized through OCTA

8.0 BUILDING AWARENESS ABOUT CULINARY TOURISM

Goal	Objectives	Status
To create awareness of culinary tourism throughout the supply chain	To build awareness about culinary tourism to all businesses in the supply chain.	ONGOING
	To stimulate interest and to engage businesses to develop culinary tourism products and/or support their regions and communities.	ONGOING
	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.	ONGOING
	Ontario will be seen as an innovator in culinary tourism on a national and international stage.	ONGOING : Ontario is recognised by the CTC (National) and ICTA (International Culinary Tourism Association) as a leader in culinary tourism.
	The explicit use of culinary tourism in provincial marketing brochures will offer tourists an enriched experience of Ontario.	ONGOING

Building Awareness about Culinary Tourism

8.1 Working Committee to Create Awareness Plan for Industry Stakeholders

COMPLETED and ONGOING in each annual OCTA communication plan

8.2 Submit Plan to Steering Committee for Funding Suggestions

COMPLETED and ONGOING at OCTA strategic planning sessions and throughout the year with members and advisors.

8.3 Create Database of Contact Names for Mailings or Mass Distribution

COMPLETED and GROWING - OCTA has a complete mailing and distribution list in addition to using social media (Twitter and Facebook) to keep over 5000 followers in touch with OCTA and Culinary Tourism events and news.

8.4 Begin Distribution

COMPLETED and ONGOING

9.0 STRENGTHEN PARTNERSHIPS AND IMPROVE COMMUNICATIONS WITH SUPPLY CHAIN

Goal	Objectives	Status
A fully networked supply chain that fosters partnerships and communication	To increase and strengthen the number of partnerships within the culinary tourism supply chain.	ONGOING: Strategic partnerships with organizations in the supply chain have increased from 0 - 30 in five years.
	To link to other working committees to reinforce communication to supply chain with a focus to build partnerships.	ONGOING: This has been successful with OCTA members being on other association committees, boards and associations.
	Create a feeling of 'association' with all interested supply chain businesses.	COMPLETED and ONGOING: Through membership in OCTA and participation in workshops, seminars and the OCTA Summit.

Strengthen Partnerships and Improve Communications with Supply Chain

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

ONGOING: OCTA has played an important role in the development of partnerships between and amongst groups and individuals throughout the supply chain.

9.2 Identify Any Partnership Strategies Observed Through the Associations That Promote Tourism Packages or Culinary Tourism Products and Destinations

ONGOING: OCTA has successfully worked with OTMPC and destinations and regions in Ontario to include Culinary Tourism as part of the tourism packaging.

9.3 Create Database of Contact Names for Mailings or Mass Distribution

COMPLETED and ONGOING

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

COMPLETED and ONGOING

9.5 Create a Provincial Culinary Tourism Brochure and Website

COMPLETED

10. FUNDING MECHANISMS

Goal	Objectives	Status
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.	To create a sustainable funding model supported by industry and government.	ONGOING and PLANNED
	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.	ONGOING
	Culinary tourism will contribute to businesses and industry stakeholders' bottom line	ONGOING
	The investment in culinary tourism product development will provide improved yield and value of the tourism experience for travellers.	ONGOING and PLANNED
	Innovative culinary tourism packaging will help extend the shoulder season for some operators	ONGOING and PLANNED
	Culinary tourism, when sufficiently developed in regions and communities, will attract investment dollars from public and private sectors on a provincial level.	ONGOING and PLANNED

Funding Mechanisms

10.1 Develop a Financial Funding Model

ONGOING: OCTA has worked with the Ministry and other funders to augment the membership model designed to support annual operational costs.

10.2 Invest in Communities and Regions

ONGOING: OCTA continues to work with 26 destinations and communities to support the development of culinary tourism.

10.3 Create Seed Funding for Regions Creating Culinary Tourism Product Strategies.

ONGOING: OCTA has been able to invest in some regions for initiatives that support culinary tourism.

10.4 Invest in Research

ONGOING: OCTA has been able to support several research initiatives that help OCTA achieve goals and objectives

10.5 Invest in a Recognition Program for Culinary Tourism

COMPLETED and ONGOING: OCTA awards

10.6 Create Workbooks and Resource Material

COMPLETED: Toolkits and website

10.7 Invest in Partnerships

ONGOING