



**Success factors in the
development of a food
destination.**

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Success factors in the development of a food destination

1. How to define a food hub?

Background

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

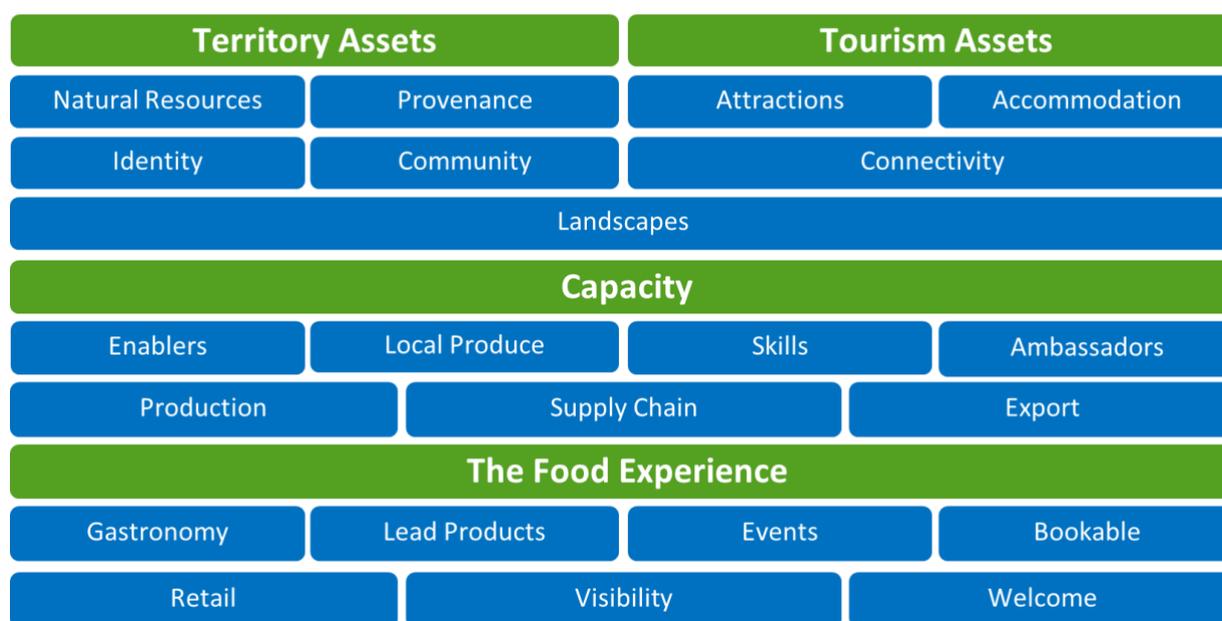
It remains the case that some regions, areas or cities of the world stand head and shoulders above others. When we talk of great food, the same names come up in conversation, over and over. Often, we speak as if this reputation for greatness results from a happy concurrence of circumstances: the right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

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

The Food Destination Development Framework

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

Food Destination Framework



Understanding these components can give insights into the case studies that follow. The definitions of each are as follows:

The components of the Framework

Territory Assets

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

Territory & Tourism Assets

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

Tourism Assets

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

Capacity

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

- Singapore's well-run ports for exportation
- America's railways across major cities in the East Coast

The Food Experience

- **Gastronomy** is the reputation of the area for high-quality cuisine.
 - The Thames Valley around Maidenhead with its three Michelin-starred restaurants
 - France's numerous and high quality boulangeries
- **Retail** is referring to what people see in shops, in the streets and in the markets.
 - Local shops in West Country market towns
 - The bustle and hum of the great London markets
- **Lead products** refers to one products that have helped build the reputation of the territory for specific ingredients, products, food production processes or culinary experiences. They are products that are at the heart of an outsider's reasons for visiting or buying.
 - Welsh lamb in Wales
 - Scottish Whiskey when visiting Glasgow
- **Events** is in reference to the number, size, and exposure of a celebration fully dedicated to food or with a strong component of local food.
 - Bordeaux's Cité du Vin
 - Croatia's on the road "Food Festival"
- **Bookable** (commissionable to travel trade) is the number, richness and interest of packaged and bookable food tourism products. These are provided primarily by private operators, including wine and food tours, cooking experiences, etc.
 - London's food market guided tours
 - Catalonia's rural farm stays
- **Visibility** refers to the clarity with which the territory's food offer is promoted, using online media, and the reach and impact of that message around the world.
 - Visit Britain's iconic logo located across major European countries
 - "Happy Cows Come from California" slogan made into a commercial
- **Welcome** the ease with which a visitor can come in contact with food and food stakeholders, whether on farms, factories, in the street or by the harbourside.
 - Catalonia's rural farm stays in which visitors help producers make cheese
 - Wine tasting at one of Bordeaux's wineries

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

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

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

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

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

What makes a food hub successful?

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

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

This section will also cover points such as these:

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

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

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

Urban destinations: common attributes

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

Urban food hubs will tend to share the following attributes:

- In an urban environment, food and drink is rarely positioned as the single leading visitor experience, but performs a high profile supporting role;
- The best urban food and drink destinations tend to be innovators, early adopters and leaders of food and drink movements - coffee, craft beer, roof-top bars, food-trucks etc.;
- Urban experiences are largely based around dining and entertainment, with events and tours providing specific points of interest for visitors;
- Tourists are important sources of trade, but demand for food and drink experiences is sustained in the most part by local audiences;
- Large wholesale food markets often serve as showcases and as visitor hubs.
- Unique food and drink often tells the story of immigration or the destination's evolution – authentic links with heritage and its peoples - food and cuisine which has evolved from immigrant populations is celebrated and embraced;

- City precincts are frequently utilised as food and drink hubs, often being centres for certain types of cuisines – as well as being defined entertainment areas, precincts are often base around ethnic or migrant population hubs;
- Major cities are showcases for the region's or nation's produce. From a tourism perspective, menus will often reflect the wider region's produce.

Urban destinations: other examples

Brooklyn, New York

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

Features include;

- Food production focus - food manufacturing has the largest share of manufacturing jobs in Brooklyn. Since the recession ended in 2009, employment in food manufacturing has grown by over 3% and the amount of food manufacturing establishments has grown almost 12%.
- Most of the food and beverage manufacturing markets and hubs are based in the Williamsburg-Greenpoint and Red Hook-Sunset Park precincts. The Brooklyn Army Terminal is a former administration building which is being reinvented as a centre of food manufacturing. The New York City Economic Development Corporation invested \$15 million on development.
- Brooklyn contains a large number of migrant hubs celebrated for certain types of cuisine, including:
 - Sheepshead Bay – seafood, Russian and Italian
 - Kensington: Polish, Mexican, Pakistani
 - Park Slope: Irish, Italian, French
 - Bay Ridge: Middle Eastern, Italian, French
 - Red Hook: African-American, Italian
 - Williamsburg: Puerto Rican, Dominican
 - Sunset Park: Vietnamese, Mexican, Chinese
 - Carroll Gardens: Italian
 - Crown Heights: West Indian, Jamaican
 - Bushwick: Japanese, Mexican, Dominican.
- MOFAD – the Museum of Food and Drink provides a specific food-based attraction. Programs include guided tastings, science demonstrations, cooking classes, seminars, discussions and hands-on workshops. MOFAD is a not for profit organisation which aims to promote the public's knowledge of culture, science, production and commerce of food and drink. It is currently working towards building the world's first large-scale edible museum exhibit.
- Smorgasbord is the largest open-air food market in the United States. It attracts between 20,000 and 30,000 people to Brooklyn every weekend. In 2016, it expanded with a weekly Sunday market in downtown Los Angeles.

Berlin, Germany

An influx of creative, trendsetting young people from all over the world makes Berlin a trendy city, brimming with art and creativity. It has a unique vibe: cutting-edge art, a growing start-up business scene, and is increasingly being known as a fashion and dance trailblazer. Contemporary Berlin mixes historic neighbourhoods and landmarks that tell of a turbulent history. The nightlife scene is extensive and the gastronomy varied.

Characteristics include;

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

Rural destinations: common attributes

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

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

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

Rural destinations: other examples

Boyne Valley

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

- Create a Louth/Meath Food Network
- Become the Food Champion of Ireland's Ancient East
- Develop the Micro Food Economy
- Target the '90 Minute Drive' Visitor
- Strengthen the Food Business Skillset.

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

The focus of the network is the Boyne Valley Series, a 'festival' that can run over four or five months, with as many as forty or fifty events, held in multiple locations.



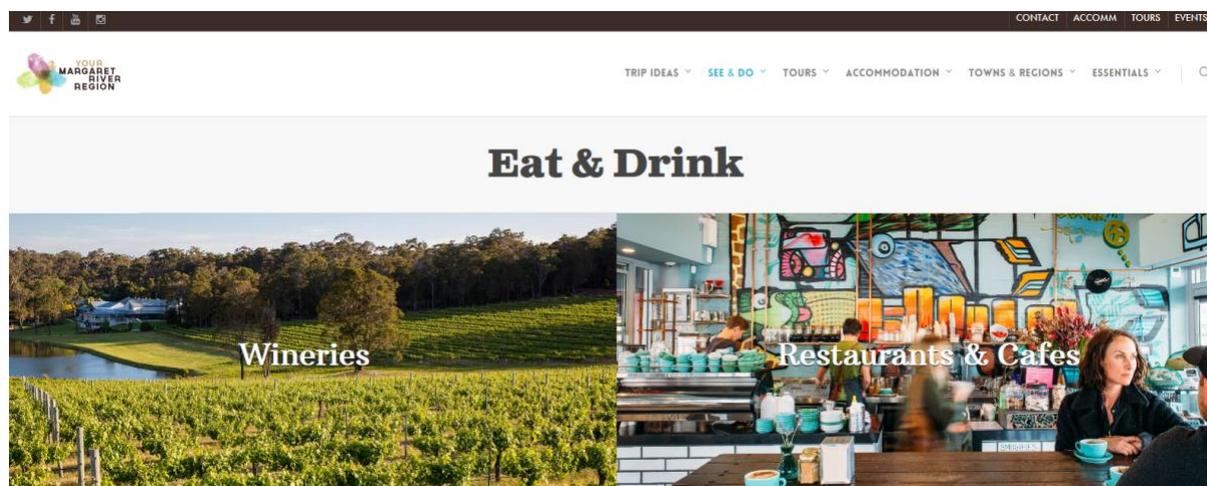
(<https://www.boynevalleyfoodseries.ie/>)

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

- The appointment of a dedicated Food Development Officer;
- Proactive engagement between all agencies connected with the food sector, from both counties;
- Provision of financial support in order to ensure the execution of the strategy;
- The impact is already beginning to be felt. In 2016, the Boyne Valley won the 'Ireland Foodie Destination' award.

Margaret River

Located approximately three hours south of Perth, Margaret River has a great depth of food and drink experiences, with its wineries being a lead proposition.



www.margaretriver.com/eat-drink/

The region has been particularly successful in establishing an effective working relationship between the tourism and food & drink sectors. Key factors include;

Strategic alignment of tourism and food & drink objectives

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

Adoption of common branding

'Your Margaret River Region' (YMRR) branding has been adopted by tourism and food & drink industry partners and is used where relevant to their respective target markets.

Examples of recent collaborative activity include;

- 2016 marketing campaign targeting Singaporean visitors, "First Class in a Glass" - Singapore is a target visitor and wine export market;
- A Margaret River wine shop has opened in Beijing
www.corporate.margaretriver.com/2017/01/chinas-first-margaret-river-wine-store-opens-in-beijing/
- Approximately 15% of MRBTA's members are wine businesses, demonstrating the close working relationships between the sectors.

Coastal destinations: common attributes

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

Successful coastal food hubs have the following common attributes

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

Coastal destinations: a further example

Iceland

For the past few years, Iceland has featured on growing numbers of 'to-visit' destination lists. The resident population of 340,000 (roughly the size of Cardiff) has seen visitor numbers grow from 490,000 in 2010 to an estimated 2.3 million in 2011, and an income forecast of 560 billion kronur (\$5.1 billion). Since the banking crisis, Iceland has emerged as one of Europe's most dynamic gastronomic destinations. Fisheries and related sectors — labelled "the ocean cluster"— are the single most important part of Iceland's economy. In Icelandic coastal towns and villages, most people make a living from fishing and fish processing.

Characteristics include:

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