

Huron Local Food and Drink Strategy

Market-Readiness Survey and Assessment

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Introduction

Culinary Tourism is a growing trend in North America and around the world. According to *The American Culinary Traveler*, a 2013 research study by Mandala Research, the percentage of US leisure travellers who travel to learn about unique dining experiences grew from 40% to 51% between 2006 and 2013.

The situation is similar in Ontario, where several regions including Muskoka, Ottawa, Niagara and Prince Edward County have witnessed strong growth in culinary-related tourism.



According to the Ontario Culinary Tourism Alliance,¹ food tourism tells the story of a destination's history, culture and people. They point to a dramatic increase in the last decade of destination marketing organizations leveraging the rise of mainstream interest in food to open new consumer markets and drive business to a wider range of regional travel suppliers working in the food and beverage sector.

The food/culinary tourism literature uses several different definitions for this trend including food tourism and culinary tourism. Agri-tourism is often used as well, however, this often refers to experiences specific to farms, and may not include restaurants or non-farm-based retailers.

For the purposes of this report, we will use the Ontario Ministry of Tourism, Culture and Sport's preferred term, which is culinary tourism. We will also use the definition proposed in *The 2011-2015 Provincial Culinary Tourism Strategy and Action Plan*², which is as follows:

¹ Ontario Culinary Tourism Alliance, *The County of Huron Food Tourism Experience Development Consultation*, 2015.

² Ontario Culinary Tourism Advisory Council, & Ontario. Ministry of Tourism, Culture and Recreation. (2005). *Culinary tourism in Ontario: Strategy and action plan, 2005-2015*.

“Culinary tourism: 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 of that region.”

In a report to Huron County, The Ontario Culinary Tourism Alliance identified a number of success factors for culinary tourism. These include the following:

- Leadership
- Market ready or near market ready culinary products and resources
- Integrated strategy
- Partnership and community-based collaboration
- Financial support and performance measures
- Destinations with good access from key origin markets
- Sufficient market intelligence
- Food tourism resources distinctive to the region
- A critical mass of agri- and/or food tourism experiences
- Effective destination marketing
- Safe and accessible environment
- Cross promotion

This report deals primarily with the second point: identifying market-ready or near-market-ready culinary products and resources.

As this report will show, Huron County has a number of distinct, market-ready (or near-market-ready) assets that can form the backbone of an integrated culinary tourism strategy.

Success in culinary tourism is not an overnight process. It takes time for the leadership to emerge, for an integrated strategy to be developed and adopted, and for sustainable events and attractions to develop.

Local Defined

There are numerous definitions for the term “local” when it comes to food and drink and it will be important for all funders of this report to come to agreement on a definition in order to develop joint marketing initiatives and even to access funding for projects in the future.

Under the Province of Ontario’s Bill 36, the Local Food Act, 2013, “local food” is defined as:

- Food produced or harvested in Ontario, including forest or freshwater food, and
- Subject to any limitations in the regulations, food and beverages made in Ontario if they include ingredients produced or harvested in Ontario.

The Local Food Act is one part of Ontario’s local food strategy, which also includes funding and programs, like Foodland Ontario.

For many years, for the purposes of labeling foods, the Canadian Food Inspection Agency (CFIA) defined “local food” as food produced within 50 km of where it was sold. But in 2013, an interim policy was introduced that would define “local food” as simply being produced in the same province in which it was sold, or, if sold across provincial boundaries, within 50 km of the originating province. That interim policy remains in place.

For the purposes of this report, it was pre-determined with the funders that the definition of “local” food and drink is based on the closest location where it is produced, according to three levels. Local may refer to:

- Huron County
- Ontario
- Canada

So, by definition, wine sourced from Prince Edward County is not local because wine is produced in Huron County. Conversely, Chinook salmon from British Columbia may

be considered local because it's the nearest Canadian location where Pacific salmon is harvested.

Market Ready Assessment for Huron County

Market Ready Defined

In this stage in the development of culinary tourism in Huron County, it's important to understand what stage its producers, retailers, accommodators and restaurateurs and other assets are in terms of “market readiness”; defined as their ability to deliver an experience that meets the expectations of the food tourist.

Only those who are market ready can be part of a larger strategy, such as a food trail, or a strategy that involves marketing support. To include in any of these efforts an asset that is not market ready is to risk a disappointed food tourist whose expectations for an experience were not met or exceeded.

There is an opportunity, though, by identifying those assets who are near market ready and who would like assistance to become market ready and join the list of market ready assets offered to the food tourist. Or they may become market ready when paired with another asset.

In order to be considered “market ready” a number of criteria must be met:

- Website is current and includes contact information
- Social media sites are up to date
- Branded signage and wayward signs, if necessary, are in place

- Business serves / sells / produces local food and / or drink
- There are consistent hours and days of operations. If the business is not open year-round, an email account is active and a phone message is current
- Front-line staff that are trained are knowledgeable about local food and drink
- Membership in an appropriate local industry association has been attained (or could be easily be attained)

Survey Methodology

A 25-question electronic survey (*Appendix B*) was created in SurveyMonkey with input from all funders, designed to gauge market readiness of survey respondents who represent farmers' markets, retailers, farmers & producers, restaurants & cafés, caterers, accommodators, wineries, breweries or distributors in Huron County, with the inclusion of a few businesses near the border of Huron County.

A number of questions were also added to the survey in order to serve the purposes of at least one other funder as it prepared a grant application.

Through discussion with the funders, three levels of “market readiness” were developed for the purposes of this survey. These levels are as follows:

- Ready to welcome and offer an experience to tourists; ready to have your business promoted to tourists
- Ready to have your business promoted to tourists with just a few changes; and,
- not ready to have your business promoted to tourists.

The survey was distributed a number of different ways over a seven-month period:

- On December 7, 2015, a letter from Local Food and Drink Initiative Co-ordinator Heather Boa with a link to the survey was sent to 130 unique email addresses via her personal email account.
- On January 6, 2016, a letter from Local Food and Drink Initiative Co-ordinator Heather Boa with a link to the survey was sent to 130 unique email addresses via Huron

County's account on Constant Contact. Thirty-five per cent of those who received the email opened it, which is an average open rate.

- On January 21, 2016, a reminder letter from Local Food and Drink Initiative Coordinator Heather Boa with a link to the survey was sent to 105 unique email addresses with a 40% open rate.
- In late June 2016, the survey was sent by direct mail to a contact list of about 200 addresses.
- In late June 2016, Huron County Tourism Marketer Jenna Ujiye sent a reminder email to her contacts in the food and drink industry.
- Reminders were sent to the 28 members on the group communications application for the Chef League and the 15 members on the group communications application for the Drink Group.
- Surveys were delivered electronically and by hand as a result of site visits or as new potential participants were identified.
- A phone campaign was initiated to help potential respondents through the survey, but it quickly became apparent that it was a cumbersome process; some respondents didn't have information immediately at their fingertips.

The initial release of the survey was supported by a press release (*Appendix C*) picked up by local media, including the December 9 edition of the Goderich Signal-Star.

Survey Results and Findings

As a result of a survey campaign, 59 responses were received (*Appendix D*), resulting in a response rate of 33%. During site visits and through other communications, many acknowledged they had received the survey and wanted to participate but had not completed it due to time restraints. Many promised to complete it, but did not by the end of July 2016.

Of those respondents, the overwhelming majority (93.22%) said they sell or serve local food, with just 6.78% indicating they do not sell or serve local food (*Summary: Appendix D*).

The respondents identified themselves as being involved in farmers' market (14), retail (21), farm / producers (22), restaurant / café (21), caterer (11), accommodations (including bed and breakfast) (8), wineries (2), breweries (2), distributors (3) and other (10).

The respondents had varying definitions of the word “local” when it came to food and beverages (Figure 1). About 31% of the respondents (18) considered “local” to mean that it was made or grown in Huron County. Another 31% considered “local” to mean it was made or grown in Ontario. And yet another 31% considered “local” to mean it was sourced from the closest available source. Just 3.39% considered it to mean it was made in Canada.

This variance in definitions further highlights the need to clearly define “local” to all participants/providers before proceeding with any marketing initiatives.

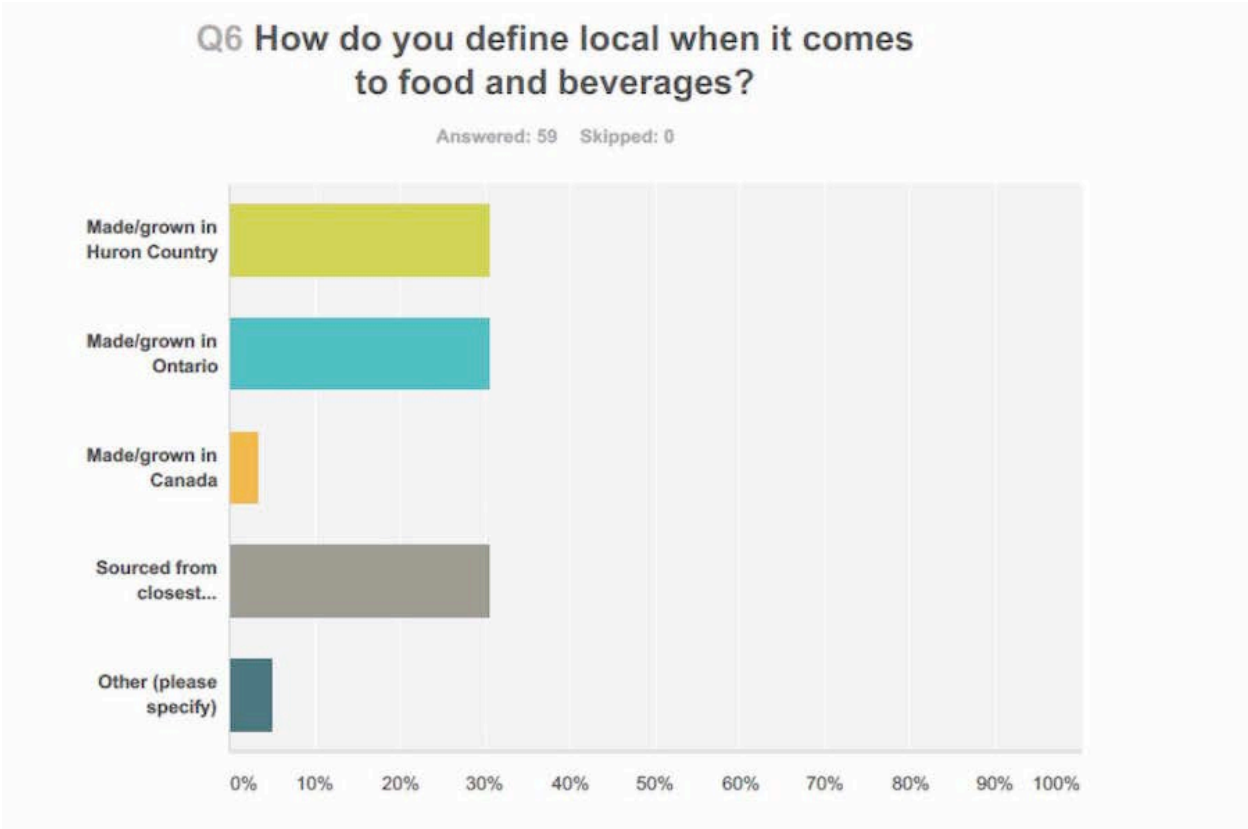


Figure 1: Definition of “Local” to Respondents.

Of the 41 restaurant, retailers and accommodators, nearly 27% (11) of respondents said 75 – 100% of their products were local in origin (Figure 2). Nearly 22% (9) said 50 – 75% of their products were local in origin. Almost 37% (15) said 25 – 50% of their products were local in

origin while just less than 10% (4) said their products were local in origin. Nearly 5% (2) were unsure.

Further to that, the vast majority of respondents (95%) said they would like to access more local product. They saw a lack of distribution system or central pick up spot and affordability as barriers to access to more local product. One respondent suggested a county-wide listing of products available to them.

Q7 If you are a Restaurant/Retail/Accommodator (demand), what percentage of the products used in your business do you consider to be local in origin?

Answered: 41 Skipped: 18

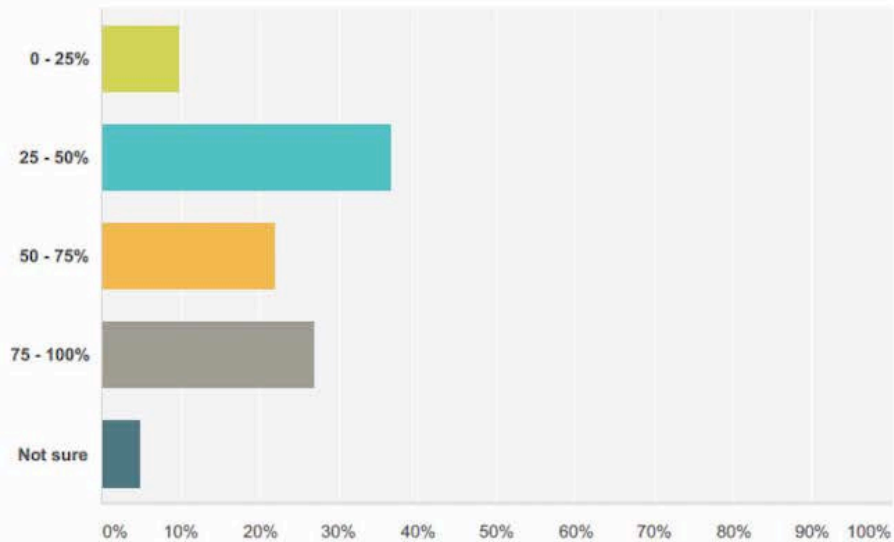


Figure 2: Percentage of “Local” Product Used by Restaurants / Retailers / Accommodators

On the supply side, 80% (28) of 35 respondents who were farmers, producers or suppliers said they currently supply other businesses that serve visitors and customers. And just over 90% (31) of 34 respondents said they would like to provide either more product or product to tourism and visitor oriented business. Many saw distribution as a challenge to providing product to businesses. A number of respondents said increased volume would make it feasible for them to run a distribution system.

It is significant to note that of all those surveyed, distribution (time and resources) emerged as the number one way in which business to business transactions could be more efficient. Another common theme was a shared vision or better communication between producers and businesses.

Nearly 64% (33) of 52 respondents said they have an on-site business open to visitors and customers. A further 17% (9) said they operate a seasonal on-site business.

Nearly 79% (37) said their hours are consistent, while just over 21% (10) said their hours are not consistent.

Respondents also weighed in on whether they offer tours, tastings, educational signage or classes and other educational opportunities, and entertainment (Figure 3). Of respondents, 50% (23) said they offer tours all the time or occasionally, 73% (33) said they offer tastings all the time or occasionally, nearly 49% (20) said they offer education signage all the time or occasionally, 43% (18) said they offer classes or other educational opportunities all the time or occasionally, and more than 44% (21) said they offer entertainment all the time or occasionally.

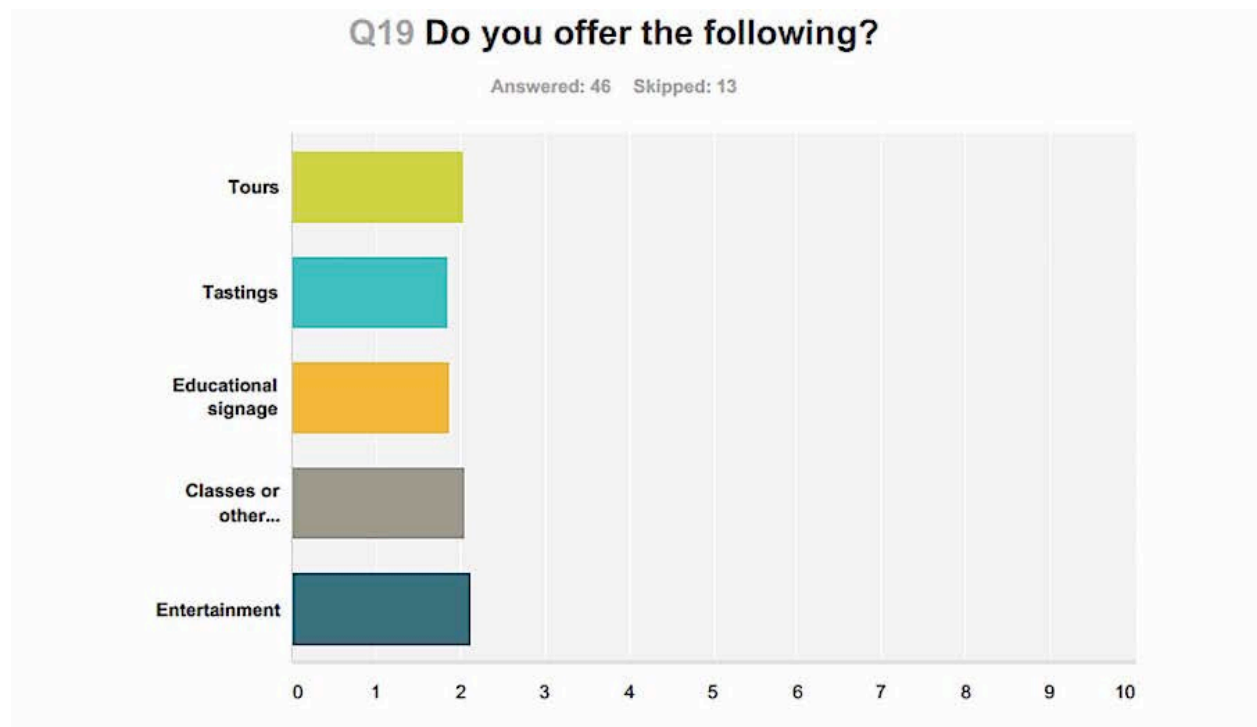


Figure 3: Experiences Offered.

Nearly 83% (39) of respondent said their staff is knowledgeable and passionate about their products, and able to communicate its story with pride. Nearly 60% (27) also said they offer a unique “taste of place” that is an authentic expression of the region. At the same time, more than 21% (10) were unsure how to answer the question.

Secondary Assessment

Based on survey responses and with input from the funders, a list of 121 potentially market ready businesses (Appendix G) was developed for review.

As noted previously, market readiness is based on the following criteria:

In order to be considered “market ready”, a number of criteria must be met:

- Website is current and includes contact information
- Social media sites are up to date
- Branded signage and wayward signs, if necessary, are in place
- Business serves / sells / produces local food and / or drink
- There are consistent hours and days of operations. If the business is not open year-round, an email account is active and a phone message is current.
- Front-line staff that are trained are knowledgeable about local food and drink

Websites and social media sites were reviewed for the 121 potentially market ready sites, and 55 business sites were visited.

Site Visits

If site visits are any indication, the food and drink industry is quite dynamic, with numerous changes taking place just within the short duration of this initiative. For example, Drift Bayfield, Cait’s Café, Stonehouse Brewery, Half Hours on Earth and Dark House Winery are all businesses that have opened this year. The day of our visit to Elephant Juice in

Bayfield, the owner announced a new business, Great Lakes Tours, which is intended to offer tours of local breweries.

In particular, if the visits to Half Hours on Earth, Stonehouse Brewery and Maelstrom Winery are any indication, there is clearly a future for experiential culinary. Each showed great pride in their products and were enthusiastic about sharing their history and information, which resulted in a pleasurable experience.

The trio were also different enough that it added to the experience: Half Hours on Earth is tucked into a corner of the former creamery building in Seaforth and dwarfed by large stainless steel tanks used by the former creamery, offering visitors a sampling of a half-dozen small-batch farmhouse ales, porters, lagers and sours that change every week; Stonehouse Brewery operates from a modern, expansive building with tasting area and retail space in the front and brewery at the back, currently offering tastings of a Czech Pilsner, made from Saaz hops and conversation to visitors, plus group tastings paired with food, and; Maelstrom Winery is located in the garage of a residential home along a gravel roadway, where they offer samplings of red and white wine and ciders, and pre-booked tours (they are building a tasting barn closer to the vineyard).

Dark Horse Winery, located beside Huron Country Playhouse, opened after our site visits were completed, but it is a magnificent building and feedback from its grand opening has been very positive. As well, Cowbell Brewing in Blyth has been active on social media and at community events since its launch of its Kölsch beer, Absent Landlord, earlier this summer, and has just recently started building its brewery.

What would assist these businesses would be some sort of wayward signage to help travellers reach these destinations without getting lost on County roadways. There is a crudely crafted directional sign at the corner of sideroad leading to Maelstrom Winery but anyone in highway traffic would have a difficult time slowing down to turn onto this gravel road. Stonehouse Brewery is visible from the municipal road but a sign on Hwy. 8 at Holmesville or Hwy. 4 at Brucefield would be advised. And while there is a sign on the building where Half Hours on Earth is located, a municipal sign at the intersection of Hwy. 8 would be a good guide for travellers.

In fact, signage was problematic for a number of businesses, including many farm gate operations. Because farm gate operations are seasonal by nature and run by farmers in addition to the tasks of planting and harvesting, hours of operation and availability are not reliable. For example, Rozendal Farm just north of Clinton on Hwy. 4 is extremely busy with strawberry sales and U-pick in late June, but the sign comes down when the season is

over and passersby would never know it's open to the public for a few short weeks in the year. If it or other similar farm gate operations were included in a list of market-ready assets, visitors may be disappointed.

Areas for improvement for businesses that operate on the farm include: clearly designated parking, maintained signage, staff that can turn full attention to customer, and educational signage or back story of the business.

Farmers and producers always do well in the atmosphere of a Farmers' Market, where they have the time to share their knowledge with visitors. Added value would be to supply branded recipe cards or for the market organizers to host cooking demonstrations using in season produce and local meat.

New and emerging businesses join a food and drink industry of businesses with a long history in this area, like The Little Inn or Benmiller Inn, which embrace culinary tourism and recognize the benefits of providing a local food and drink experience. Their menus play up the local content, with suppliers noted in the descriptive text or as a listing at the end of the menu.

Even with their experience, a waitstaff that is trained to reinforce the story of local food would be advantageous. For example, a dining experience would be enhanced if waitstaff were to share the story of Weth's Mushrooms or Coastal Coffee Company.

It was disappointing at a restaurant to have to educate the waitstaff that Cowbell Brewing is a local company.

There are also a number of gems that would benefit from increased marketing. For example, Ferguson Apiaries has a very noticeable sign at the end of the laneway to this rural property, a lovely shop filled with far more than just honey, picturesque honey hives nearby, and an owner who is passionate about her business and ready to talk. But without an online presence or marketing, it's tough to get traffic to the door. This business would benefit from a group marketing strategy.

The observations of the site visits are listed in Appendix G, and include a number of recommendations such as providing a summary of local suppliers at the bottom of restaurant menus and creating a promotional card that tells the back story of the business.

Stories, Photography, Online and Video Assets

This report contains sixty-one asset “profiles” (*Appendix I*) culled primarily from individual websites, the *Taste of Huron* website and in some cases, print sources.

The text has been left in its original form and may, depending on its age, need to be updated. As each was written for an individual purpose and audience, there is little consistency in the writing or graphic identity.

The online presence of Huron County assets varies dramatically (*Appendix I*). Some organizations have well-developed websites augmented by Facebook, Twitter and Instagram, while others merely have a bare-bones site or a Facebook site alone.

There are also many Huron County assets that have no web presence at all (or none that could be located through traditional search methods.)



These non-web assets need to be carefully considered in light of how frequently tourists use the internet to research and book travel and other leisure activities.

According to a U.K. study in *Travel Weekly*³, as many as 80% of travellers now book travel themselves, online. And, according to a study released by Open Table,⁴ 86% of diners routinely review restaurant menus online before going to the restaurant.

Culinary tourists use the Internet and social media to find destinations and share their experiences. Those assets that do not have a web presence of any kind are in danger of being left out of the mix, especially if the County develops a strategy that is primarily or solely online.

Studies have also shown that photography and visual images are extremely important in an online environment.

³ <http://www.travelweekly.co.uk/articles/41280/80-booking-holidays-online-finds-study>

⁴ <http://press.opentable.com/releasedetail.cfm?releaseid=922416>

The quality of the photographic assets also varies dramatically. Many of the photos were originally posted on social media, and while the quality is sufficient for that purpose, it may not be sufficient for other uses, especially print. Poor lighting is also a frequent problem. Some sites only include one or two photographs, and some sites feature food photography that does not show the dishes in their best light. People photos, that is photos of the producers, chefs or owners, are often not included.

As part of this project, a template for gathering consistent information from culinary tourism assets has been developed. (*Figure 4*). This could be used as a template that operators fill out themselves, or could be used as an interview template for a communications professional putting together a website or other projects.

Name of Business:

Retail? Y/N

Retail hours (if applicable):

What products/services does your business supply?

Who founded this business and in what year?

Why did you (or the founder) start this business?

What aspect of your business are you passionate about?

What is your best or most popular item/service and why?

Did you introduce any new products or services recently? What are they?

How would your clients/customers describe your business?

Is there something unique or unusual about your business/service that, when people first hear about it, they tend to say “Wow – I didn’t know that!”

Is there an unique history connected to your business? (I.e. family farm since the 1800s, located in an old blacksmith shop, famous person once stayed here, etc.)

Is there anything else you’d like to tell us about your business?

Figure 4. Story Template.

Culinary Tourism Activities in Huron County

History

Huron County farmers and producers have a long history of growing, producing and supplying, whether it's at farmers' markets, at the farm gate, or through retailers and restaurants.

One of the earliest examples of organized culinary tourism in Huron County was the *Taste of Huron Trail*, an initiative of the Huron Tourism Association. Although the initiative is no longer active, a live website, www.tasteofhuron.ca, describes its mission to “celebrate Huron County’s Harvest by promoting locally produced, sustainable foods and culinary excellence on Ontario’s West Coast.”

As well, it ran a number of dinners to celebrate local food, and a winter dining program.

It was followed by Huron Perth Farm to Table Network, which was started in 1999 and created four maps of more than 100 farms and food retailers in Huron and Perth where people could buy locally produced goods. Its map has not been updated since 2012.

Shakespeare to the Shoreline, a mid-2000s marketing program funded in part by Huron Tourism Association that promoted driving tours spanning from the hamlet of Shakespeare in Perth County to the shoreline community of Goderich in Huron County. One of the self-guided driving tours wound its way through country roads with stops at restaurants, retailers and farm gates for a taste of baked goods, meats, cheese and more.

In 2012, the County of Huron in collaboration with Huron Business Development Centre published a report, *Viticulture in Huron County: An Introduction for Investors*, with the goal of giving potential investors “a better sense of what it takes to succeed in this business.”

Within three years, Maelstrom Winery, which began a test plot in Huron East in 2009, would become the County’s first winery when it released its first wine in 2015. Dark Horse Winery was announced in South Huron, right next door to Huron Country Playhouse in 2012 and held its grand opening in July 2016.

Hessenland Country Inn planted grapevines on its property this past spring and plans to begin pouring its own wine for the restaurant and events by 2018.

Today, upwards of four other vineyards have been planted.

Prior to 2016, there were no breweries operating in the County.

Chefs League

In 2015, the Huron County Chefs League was first created to bring together chefs and food producers in Huron County to help “build a unique culinary culture in Huron County,” according to an article published in the Goderich Signal Star on December 23, 2015. In its beginnings, there were seven members.

In 2016, the Huron County Chefs League has expanded to include nearly 20 members and has met at numerous chef’s tables, with Chef Spencer Vail of Cait’s Café taking the lead.

Among items discussed:

- Membership in FeastON, a marketing program open only to those restaurants and experiences that meet a strict set of criteria, include requirement that 25% of annual food cost comes from Ontario growers and producers. The County of Huron has budgeted \$2,000 in order to pay the \$200 registration fee for up to 10 restaurants and experiences to join FeastON.
- Organizing an event that would fund a scholarship for a chef apprentice to help overcome the shortage of chefs in Huron County.
- Organizing a fall harvest dinner, using \$2,000 offered through the Huron Food and Drink Initiative to pay suppliers while the chefs donated time. The local wineries and cideries would be invited to participate. Entry to the event, *A Taste of Ugly*, which uses produce leftover after the harvest, would be by donation, with a large marketing effort in order to get coverage in the GTA, Kitchener-Waterloo, and London markets. (Through discussion, it was decided that the funds raised would be donated to the Huron County Food Bank to offset costs to purchase a walk-in freezer. The Chefs League also decided to delay the event until Fall 2017.)
- A mentoring workshop that teaches chefs who aspire to use local products how to order locally and the advantages of using local products.

Drink Group

The Drink Group's first meeting was held April 7, 2016 at REACH Huron in Clinton by invitation from the Huron Food and Drink Initiative and in consultation with Liz and Frank Ihrig of Hessenland Country Inn. At its first meeting, attendees made introductions, identified issues of common concern and sampled food and drink provided by Cait's Café, Coastal Coffee Company, Truly Local and Elephant Juice.

Among the first meeting's successes:

- Introduction identified who the players are in the drink industry
- Acknowledgement that working collaboratively in order to build capacity, whether it's distribution or marketing
- Readiness to continue to meet as a group

The Drink Group held a second meeting May 2, 2016 at Hessenland Country Inn. Among items discussed:

- Use \$2,000 offered through the Huron Food and Drink Initiative to offset costs of its members' involvement in A Taste of Ugly, which is being organized by the Huron County Chef League
- Need for administrative support to keep its initiatives on track

It has been more difficult to identify producers who may benefit from membership in the Drink Group because agricultural properties do not require rezoning or Official Plan amendments in order to plant vineyards or fruit trees, and so it becomes necessary to rely on word of mouth.

Terms of Reference

The Drink Group has indicated that it is interested in developing Terms of Reference. Two meeting dates with facilitator Vicki Lass, OMAFRA's Agriculture and Rural Economic Development Advisor Huron & Perth, are set for the fall: October 3 and October 24 from 6:30 p.m. to 9:30 p.m. at the Clinton OMAFRA office.

Towards a Regional Business Model

Huron County Assets

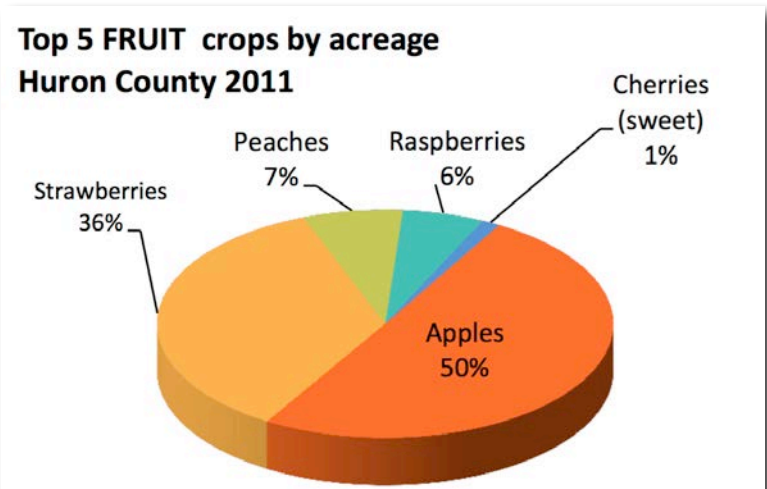
Culinary tourism provides synergies between two of Huron County's most important sectors – agriculture and tourism.

According to Huron County's Economic Development Department, agriculture is one of the largest and most important sectors within Huron County – and based on the number of farms, acres of farmland and gross farm receipts, Huron County continues to be the most agriculturally productive county in Ontario.



According to 2011 Census data, there are 2,467 farms in Huron County, involved in beef and cattle ranching, corn farming, soy bean farming, hog and pig farming and other activities. The top five fruit crops by acreage are apples (accounting for 50%) followed by strawberries (36%), peaches, raspberries and cherries. The top five vegetable crops by acreage are sweet corn, cabbage, squash, beets and pumpkins. There are also 89,000 maple taps and a small but growing number of grape vines that support Huron's emerging wine, cider and craft beer industries.

This variety provides an excellent base from which to build a vibrant culinary tourism sector. Tourists to Huron County spend approximately \$60 million in the county each year. Tourism visits to Huron County are increasing each year, with 698,000 visits in 2013, according to the 2015 Huron



Culinary Tourism in Ontario

Travel and tourism is big business in Canada and around the world. According to a recent report (2015) by the Canadian Vintner's Association and the Tourism Industry Association of Canada, tourism is responsible for \$88.5 billion in economic activity each year and 627,000 jobs.

In Ontario, the province has identified culinary tourism as a growth area for the province, creating a 10-year strategy in 2006, and refreshing that with an additional four-year plan in 2011.

The four-year plan (*Four-Year Culinary Tourism Strategy and Action Plan 2011-2015*) states “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” and sets out the ambitious goal of making Ontario a leading culinary tourism destination.



The strategy also suggests that culinary tourism is no longer a niche market. “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.”

In Huron County, the percentage of domestic visitors is much higher than the Canada-wide statistics. According to the *2013 – 2014 County of Huron Annual Tourism Report*, Huron County has a visitation of almost 1 million visitors per year with 94% of the visitors coming from Ontario and out of these visitors 45% are overnight. Only 4% of Huron's visitors are coming from the US. Among Ontario visitors the majority are coming from: 23% Toronto, 20% London, 17% Kitchener/Waterloo and from abutting counties (20%) including Middlesex, 13% Bruce, 6% Perth, 3% Lambton and 1% Wellington.

The growing importance of culinary tourism is reflected in the number of counties, cities and regions that have developed or are in the process of developing culinary tourism strategies and initiatives. Some of these are detailed in the next section of this report.

According to the Canadian Tourism Commission (2003) culinary tourism goes well beyond the dining experience. It includes a variety of culinary, agri-tourism and agri-food activities that showcase food and beverages and provide an opportunity for visitors to discover dishes indigenous to a region while learning about the talent and creativity of the providers.



For the purposes of this report, culinary tourism activities include the following⁵:

- Farmers' markets, food and/or drink festivals or festivals with a strong food /drink component
- Restaurants that feature/promote local ingredients
- Food trucks that feature local ingredients
- Shopping for specialty foods at retail stores
- Visits to wineries, breweries or cideries
- Pick-your-own farms and orchards
- Farm gate sales
- Cooking classes and demonstrations
- Related accommodations and attractions

The benefits of culinary tourism go beyond merely increasing tourism dollars spent. Additional benefits include extending the tourism season (duRand, 2006), cultivation

⁵ Adapted from *The Rise of Food Tourism*, OCTA and Skift.

international trade (The Economic Planning Group of Canada, 2001), attracting new residents to the area (Taylor, 2010) and even reinforcing environmental protection by discouraging the wasteful long distance transportation of food supplies (Henderson, 2009).

Culinary Tourism – Important Considerations

The growing interest in culinary tourism is supported by a growing body of research, academic and mainstream literature and guidance documents from agencies in Canada and around the world.

These studies and articles highlight a number of important considerations for regions or individual providers considering a culinary tourism project.

Signage

Many studies highlight the importance of clear, compelling signage and wayfinding tools.

At the heart of every authentic culinary and wine tourism experience is the farm gate. Culinary tourists are driven to discover and explore the rural highways and byways of their chosen destination. However, farms tend to be off the beaten path. Wine and culinary tourism consumers want and need access to reliable, accurate destination information. They want it to be relevant (updated annually) and they want it in a useable format (print or soft-copy). Some just want the GPS (global positioning satellite) coordinates to eliminate the need for a map.

- Stewart, Bramble, & Ziraldo (2008)

Staffing and service quality

In its Food Tourism Checklist, OCTA highlights the importance of having staff present to greet visitors within sections and communicating a story and heritage with pride.

Huron Local Food and Drink Strategy



As Stewart, Bramble and Ziraldo (2008) point out, culinary tourists tend to be more educated and experienced travellers and have high expectations for food and service quality.

Promotion, the Internet and photography

A number of research studies (Boyne & Hall, 2004; Liu, Norman & Pennington-Grey, 2013) point to the importance of the Internet in promoting culinary tourism destinations and experiences.

Boyne & Hall (2004) suggest that food and beverage links within a site should be developed in such a way that they will also reach potential tourists who have no expressed interest in local or regional food and drink products or areas' gastronomic heritage. Lui et al. (2013) highlight the importance of photographs to culinary tourism. High-impact professional photography is paramount, they suggest, but make sure to supplement that with a comprehensive source of user-generated photos to build organic consumer engagement.

There are many potential market-ready assets in Huron County that lack a web presence or have poor graphic identities or photography. Consideration to moving these assets forward should be given.

Data collection

The importance of setting measurable objectives and tracking results is highlighted in many studies. However, in a case study of Waterloo-Wellington's Ale Trail, Plummer et al. (2003) found that brewery operators seldom collected important data including the number of visitors and how they heard about the brewery, leading operators to undervalue programs like the Ale Trail. Participant surveys, on the other hand, revealed that visitors did value the program and were likely to recommend it to others. This highlights the importance of encouraging operators to collect relevant (and accurate) visitor data as a means of measuring effectiveness.



Other Regional Strategies and Culinary Tourism Initiatives

Bruce County

1. RTO 7

Bruce County is part of Regional Tourism Organization 7 (RTO7) – an initiative that joins the counties of Bruce, Grey and Simcoe in tourism initiatives. Through RTO7, individual member organizations have access to on-line customer service training as well as an image bank of 12,000 professional that individual member organizations can use to promote their businesses.

In 2011, RTO7 produced *RTO7's Guide to Sustainable Agritourism*, a guidebook for tourism operators. This guidebook heavily emphasizes sustainability as opposed to tourism development.

RTO7 website:

<http://rto7.ca/Public/Home>

RTO7's Guide to Sustainable Agritourism (requires registration/login):

[http://rto7data.ca/RTO7Media/RTOFiles/Agritourism_May%203%20\(1\)_d5a8b297-e5e2-4d4b-8f82-2faebff91087.pdf](http://rto7data.ca/RTO7Media/RTOFiles/Agritourism_May%203%20(1)_d5a8b297-e5e2-4d4b-8f82-2faebff91087.pdf)



The Bruce, Grey and Simcoe website lists farmers' markets, restaurants, bakeries, specialty stores and more across Bruce, Grey and Simcoe. This interactive site allows visitors to add listings to their own "inspiration book", which can then be printed.

BruceGreySimcoe food site:

<http://brucegreysimcoe.com/food/where-to-find-it>

2. Grey Bruce ACA

The Grey Bruce Agriculture & Culinary Association (Grey Bruce ACA) is a non-profit member-based association promoting local foods through networking, marketing and education. Members are highlighted on a dedicated website, FoodlinkGreyBruce, and are able to use the "Field to Fork" logo. The Foodlink site includes a number of business profiles. One of the Grey Bruce ACA's biggest projects is the

annual printing of the Grey Bruce Agriculture & Culinary Map, which is a printed product and not available online.

Grey Bruce ACA:

<http://www.greybruceaca.com>

Grey Bruce Foodlink:

The homepage of the Grey Bruce Foodlink site has been updated recently, while other sections have not been updated since 2012. The events section contains no upcoming events.

<http://www.foodlinkgreybruce.com>

Individual profiles of businesses on Foodlink:

<http://www.foodlinkgreybruce.com/business-profiles/>

3. Explore the Bruce

Bruce County also has a dedicated website (separate from the GreyBruceSimcoe site) that promotes tourism in Bruce County. This site includes restaurant listings as well as farmers' markets.

Explore the Bruce farmers' market listings:

<http://www.explorethebruce.com/ontario-local-food.php>

4. Saints and Sinners Trail

Seventeen Grey, Bruce and Simcoe County beer, wine and cider producers (as well as three museums and a historic walking trail) make up the Saints and Sinners Trail. A passport contest was launched in June 2017 with a contest promotion.

Saints and Sinners Trail:

<http://saintsandsinnerstrail.com>

<https://www.facebook.com/SaintsandSinnersBruceGreySimcoe/>

Norfolk County

Norfolk County bills itself as “Ontario’s Garden”. The Norfolk County tourism website includes listings of farms, restaurants, wineries & breweries, farm gate sales, etc. Organizations are invited to become “marketing partners” (\$175 fee per year), which gives them listings online and in print. Norfolk County also produces an e-newsletter, Norfolk Flavours, which is sent out to approximately 1,200 subscribers 17 times a year.

There is also a trail of wineries and breweries called “Toast the Coast Trail.” Limited promotion materials for this have been produced for this trail.

Norfolk County public site:

<http://www.norfolktourism.ca>

Norfolk County marketing partners:

<http://www.norfolktourism.ca/partners/become-a-partner/>

Toast the Coast Trail

<http://www.norfolktourism.ca/wineries-breweries/>



Oxford County

1. Southwest Ontario Tourism Corporation

Oxford County is part of the Southwest Ontario Tourism Corporation (SWOTC), a provincially mandated Regional Tourism Organization for Southwestern Ontario, also known as Region 1. The region is publicly branded as ‘Ontario’s Southwest’.

They have identified three priority market sectors, including culinary, which includes wine and beer.

There are also five taste routes/itineraries (Rural Routes) that have been developed and are available in an online booklet.

SWOTC members and partners site:

<http://swotc.ca>

SWOTC agritourism strategy:

This strategy was created in 2012 and includes a market-ready assessment of their assets. Many of the links are already outdated.

<http://swotc.ca/wp-content/uploads/Agri-tourism-Strategy.pdf>

Ontario's Southwest public site food and drink section:

<https://www.ontariosouthwest.com/ways-to-play/food-drink/>

Rural Routes:

https://res-5.cloudinary.com/simpleview/image/upload/v1/clients/southwestontario/SWOTCMagazine_c84de07a-51ef-4275-b7a4-0c5d572189c8.pdf

2. Tourism Oxford/Oxford Fresh

Separate from the SWOTC, Oxford Country operates a culinary program called Oxford Fresh. This program promotes Oxford County as a destination for local culinary experiences including the Oxford County Cheese Trail, Agri-tourism attractions, breweries, farm gate stores and restaurants featuring local food. Printed material can be ordered online.

Tourism Oxford:

<http://www.tourismoxford.ca>

Oxford Fresh:

<http://www.tourismoxford.ca/Oxford-Fresh>

Oxford County Cheese Trail

<http://www.tourismoxford.ca/cheese-trail>



Wellington County

1. Taste Real/Guelph Wellington Local Food

Launched in 2011, **taste•real** started out as a branding initiative of Guelph Wellington Local Food, developed to support local businesses and farms. Taste Real is now a County of Wellington initiative.



Taste•real undertakes the marketing of local food initiatives by developing new products and marketing local farm and food businesses so that members can focus on their own product. Membership costs \$159 - \$259 for farm members (depending on the size of the operation.)

In 2015/16 Taste Real contracted the Ontario Culinary Tourism Alliance (OCTA) to develop a County of Wellington Food Tourism Strategy to position the region as a food tourism destination.

Guelph Wellington Local Food/Taste Real initiatives include The Local Food Map, Field Dinner (a chef/producer event), Rural Romp (a one-day festival) and the Buttermarts and Buggies Trail, which emphasizes Mennonite cultural offerings.

Taste Real site:

<http://www.tastereal.com>

Taste Real OCTA plan:

<http://www.tastereal.com/wp-content/uploads/2014/01/Executive-Summary-County-of-Wellington-FTS.pdf>

Rural romp event:

<http://www.tastereal.com/events-2/fall-rural-romp/>

Field Dinner:

<http://www.tastereal.com/events-2/field-dinner/>

Buttermarts and Buggies:

<http://www.buttertartsandbuggies.com>

2. Individual town/township events

Wellington County includes the town of Minto, which is pursuing an agritourism strategy for the area.

Town of Minto:

<http://town.minto.on.ca/visitors/culinary-and-agritourism>

Perth County and Stratford

1. Stratford Tourism Alliance

The Stratford Tourism Alliance (STA) Corporation was created in 2007. It is a private sector, non-profit, incorporated body with industry membership and City of Stratford representation. It is a membership-driven marketing company directed by a Board of Directors made up of private and public sector representatives. The corporation is managed by full-time staff. The STA is funded by membership fees, consumer accommodation fees, advertising, partnership funds and the City of Stratford.

The Stratford Tourism Alliance

<https://www.visitstratford.ca/about-the-stratford-tourism-alliance>

2. Savor Stratford

Savor Stratford, which ran a two-day festival that began in 2008, was cancelled in 2015. Instead, the Savor Stratford brand has morphed into a year-round strategy (under the STA umbrella) that includes the chocolate trail, the Bacon and Ale Trail and Tutored Tastings.

<http://www.visitstratford.ca/savour-stratford>

<http://www.visitstratford.ca/stratford-chocolate-trail>

<http://www.visitstratford.ca/stratford-bacon-and-ale-trail>

<http://www.visitstratford.ca/stratford-tutored-tastings>

3. Stratford Garlic Festival

This two-day event is sponsored by the local Kiwanis.

<http://www.stratfordgarlicfestival.com>

Chatham-Kent

1. C-K Table

CK Table is a farmer-run organization that acts as a catalyst for local food in southwestern Ontario. They run a number of events, including a dinner series, a craft beer & cider festival, a community corn roast and its signature event, CK Table Farm-to-Table Dinner. According to organizer Paul Spence, C-K Table has never received any funding from any level of government.

C-K Table:

<http://cktable.ca/>

2. Chatham-Kent Tourism

Agritourism is promoted through the Chatham-Kent Tourism website where there are links to a few dozen local producers. (They are also part of SWOTC.)

Chatham-Kent site:

<http://www.chatham-kent.ca/tourism/thingstodo/pages/agri-tourism.aspx>

Next Steps

Recommendations

Ensure all web-based assets are current.

Tourists who rely on web resources for information expect that information to be current and up-to-date. Website that are out of date run the risk of discouraging would-be visitors, or worse, misdirecting them. Currently, the Taste of Huron website is out of date, as is the Huron Perth Farm-to-Table website. These should be updated or taken down.

Determine the future of Taste of Huron.

The Taste of Huron program has been suspended and its future has not been publicly announced. If the program has been shelved, the website should be taken down. If the strategy is to use the Taste of Huron graphic identity and assets as the basis for another strategy, the current website should be scaled back so that it only includes current information.

Start small.

Both the funders and those involved in culinary tourism seem to agree on the creation of a culinary trail or route, pending funding. However, it is possible to start this on a smaller scale, by merely publishing (online) a selected route and ensuring that the providers are on board. A fall harvest route, for example, could highlight several farm gate sellers as well as a few stops for coffee and lunch.

Continue to provide leadership and support.

With the exception of C-K Table, most successful culinary tourism initiatives require the support of various levels of government. It is also not uncommon for strategies to evolve and change over time, and for events to be cancelled or changed as they evolve. These events should not be regarded as “failures” – they are merely steps in the normal evolutionary process.

Seek additional leadership from the provider community.

Recruit and hire (honorarium) leaders from within the community with payment tied to achieving set deliverables.

Identify businesses with marketing experience; tap into their expertise/leadership.

Several Huron County businesses (often beverage businesses) have well developed marketing strategies with sophisticated websites, graphic identities, etc. These businesses should be approached directly about providing leadership to a local cluster of businesses, with an eye to created destinations/experiences.

Provide “value add” services in exchange for participation where they can easily see the benefits.

- Hire summer PR intern to create/update websites and social media sites for the businesses as well as the central site.
- Hire a professional photographer for a set period of time to take high res photos suitable for all applications (owned by Huron but shared with business owner).

Organize a food and drink summit.

A number of challenges, such as distribution and reliable sourcing and administration, came up during discussions with producers, restaurateurs and retailers. These challenges are being discussed in some limited form at the Chef League and the Drink Group, but an industry event that brings together stakeholders to discuss common challenges and solutions would be invaluable for this area of tourism growth. An agenda for the summit would also include experts and leaders in the industry from across the province.

Clearly articulate a culinary tourism strategy; commit to multi-year funding and/or support.

At this stage, Huron County does not have a clearly articulated strategy. This strategy, which should include metrics to measure the benefits, should be developed and clearly articulated to all participants and would-be participants. Because many culinary tourism initiatives take several years to “catch on” projects should not be funded as “one-offs” – a stable, multi-year funding model is required.

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⁶ These two resources have not been included in the electronic package; they are printable factsheets.

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Useful Resources

The following annotated bibliography provides a summary of documents and resources that may be helpful in planning a regional culinary tourism strategy both at the micro and macro level.

Resources for Planners and Promoters

Innovative Best Practices to Foster Sustainable Tourism in Ontario's Rural Communities

University of Guelph Tourism Collaborative, February 2015

A great introductory and overview document that includes strategic considerations, case studies and relevant literature.

Included in the best practices are the following:

- Identifying unique product(s) that possesses exceptional attributes that are distinctive to its place;
- Effective governance structure;
- Long-term strategic planning;
- Community participation;
- Long-term funding structures; and
- Leadership.

The Rise of Food Tourism

By Skift and the Ontario Culinary Tourism Alliance, 2015

This report documents the growing importance of culinary tourism in Ontario. In it, the authors document six key strategies to develop food tourism, as follows:

1. **Determine if you're market ready to receive food tourists.**
2. **Create a network of like-minded hospitality and tourism suppliers.**

3. **Collaborate with the network to build food experiences.** Co-creation is important to develop a well-rounded food tourism infrastructure in any destination. Once a network of suppliers is established, crowdsource as many ideas as possible to create immersive local destination experiences. Seek out different potential partnerships integrating meals, tours, tastings, lodging, education and entertainment to develop dynamic product opportunities.
4. **Create special events and social media promotions.** Interdisciplinary events combining food and other cultural activities are popular because they attract multiple markets and expand the audience beyond just hard-core food fanatics. Build social media contests aligned with the event, and be aware that coordinating the online conversation is a major endeavor. Make sure to commit the necessary resources required to do it well.
5. **Develop visually engaging campaigns with an educational message.** Promotional campaigns must show how the local culinary experience is unique to the destination by specifying local F&B industry personalities, their product, and the different venues and environments that visitors can explore.
6. **Measure everything and share it.** An effective food tourism strategy includes benchmarks that define overall business goals.

Creative food clusters and rural development through place branding: Culinary tourism initiatives in Stratford and Muskoka, Ontario, Canada

By Anne H.J. Lee, Geoffrey Wall and Jason F. Kovacs, 2014

This paper details the development of culinary tourism in Muskoka and Stratford. An interesting read for anyone interested in pursuing similar strategies.

Culinary Tourism

By Dan Taylor, 2010

Written from an economic development point of view, this article highlights the importance of culinary tourism to the long-term growth and development of a region. The author, Dan Taylor, posits that culinary tourism can play a vital role in attracting new residents and revitalizing a community.

Beer tourism in Canada along the Waterloo–Wellington ale trail

By R. Plummer et al., (2005).

A research-based must read for anyone considering the development of a trail product.

Resources for Farmers and Other Providers

How-To Guide: Develop a Culinary Tourism Product

Canadian Tourism Commission, 2003

This 21-page guide provides step-by-step instructions for providers, including a self-assessment readiness checklist.

Managing Risks on Farms Open to the Public

Developing Agri-Tourism Operation in Ontario

OMFRA, 2010

These two fact sheets from OMFRA are straight-forward guides for farmers considering an agri-tourism or culinary tourism operation. The risk fact sheet includes a handy checklist that forms a risk assessment.

<http://www.omafra.gov.on.ca/english/busdev/facts/15-005.htm>

<http://www.omafra.gov.on.ca/english/busdev/facts/10-027.htm>