

CASE
STUDY



Fáilte Ireland
National Tourism Development Authority



**FOOD TOURISM IN
THE BASQUE COUNTRY**

**Draft in
Development**

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1.1 INTRODUCTION TO THE DESTINATION

The Basque Country covers an area of 7,234 km² and its position makes it the nexus of the European Atlantic axis. With a population in excess of two million people, the autonomous community in northern Spain can boast over 5,000 years of history in which it has conserved a unique culture and the oldest language in Europe.

The Basque Country is celebrated for its food and wine offerings, from bar food in the form of pintxos available at almost every neighbourhood restaurant, to a city with more Michelin Stars per capita than almost anywhere else in the world.



BASQUE COUNTRY POLITICAL - GEOGRAPHICAL DIVISIONS

Geographical level	Governing entity
Basque Country level	Basque Country Government. In tourism they consult with the Tourism Department and the Basque Agency for Tourism, Basquetour.
3 provinces (Bizkaia, Gipuzkoa, Alava)	3 Provincial Councils, one per each province. These entities collect taxes.
3 capitals of province (Bilbao of Bizkaia, San Sebastián of Gipuzkoa, Vitoria of Alava)	City Council of each
Numerous counties	Each county has a Rural Development Agency or in the case of Alava a 'Cuadrilla', all have the same role.
Municipalities	Mayor and chancellors



**SECTION
TWO**

PRE-COVID19



2.1 DESTINATION TOURISM STRATEGY

In the Basque Country's latest tourism strategy, Master Plan for the Basque Country's Tourism 2017-2020, the destination identified seven different areas of focus:

1. EXCEPTIONAL TOURISM OFFER

Consolidate the implementation of a tourism offer that is exceptional throughout the tourist's travel cycle. The reception process, the experiences in the territory and the services offered throughout the visitor's stay must be oriented at all times in order to generate memorable experiences, with a high degree of their own personality along with capitalising upon the competitive advantages that the Basque Country can exploit.

The Basque Country does not start from a bad position, but there is room for improvement on experiences, products and services being connected to one another. Enhancements are also required in creating more memorable experiences, increasing the expenditure by visitors (specially excursionists) in the Basque Country and increasing the value added and its perception by customers etc.

2. VISITOR CONQUERING AND LOYALTY

Deploy innovative and effective marketing, with the main objective of creating more demand in the target markets, based on increasing the 'understanding' of the Basque Country as a tourism destination.

This strategy aims to increase market share, but also to increase repeat visitors. Most of the territories within the Basque Country have less than 40% of repeat tourists but have many repeat excursionists.

3. LOCAL COMMUNITY

Develop mechanisms so that tourism is a generator of economic and social progress, wealth and quality of employment and life for entrepreneurs, micro - SMEs, professionals, and the Basque society in general.

The Basque Country as a whole cannot be considered a place where there is over-tourism. In2destination carried out a study on tourism carrying capacity on six municipalities (Bilbao, San Sebastián, Zarautz, Gernika, Vitoria and Laguardia) in 2016-2017 and found areas for improvement, but nothing like what the media was making believe.

Fundamentally the territory is committed to sustainability in its broadest terms, hence this area intends to develop actions so that social cohesion is present when developing tourism to preserve the way of living of residents.

4. SUSTAINABILITY

Establish sustainability as the guiding principle for tourism development in the Basque Country and cultivate a model of sustainable and responsible growth that is compatible with the preservation of the quality of life of its inhabitants and the ability to continue creating value.

To steer these principles, a Code of Ethics for Basque Tourism was developed.

5. COMPETITIVENESS

Promoting competitiveness in the Basque tourism industries to offer a diversified and seasonally adjusted offer that meets the expectations of the right customers, at a lower cost than its competitors through the implementation of a three pronged approach:

- **Promotion of the capacity building, education and training of human capital.**
- **Promotion of innovation and new technologies, as a mechanism to give more value to tourists and provide them with more efficient services.**
- **Development of a simpler and more competitive legal framework.**

Overall, it's difficult to support the "at a lower cost" principle, as it's an oxymoron with competitiveness and social sustainability. In fact, the Basque Country in the context of Spain is quite expensive but still cheaper than neighbouring France. They believe that the competitiveness should be based on the first key are of focus plus everything related to capacity building, digitalisation, innovation, improving processes, marketing practices etc.

The aim of economic and social sustainability is also that the employees of tourism industries earn salaries that allow them to enjoy a comfortable life in the Basque Country. After all, as already stated, it is not a cheap place to live (housing costs, etc.).

6. TOURISM AND TERRITORY

Deploy the appropriate instruments for the management and planning of the use of the tourism space and the resources that tourism consumes in the territory. That the entire value chain of the tourism experience is considered, with the objective of moving towards a better tourism distribution of the territory, favouring development and greater activity based on the seasonality of each destination in the Basque Country and the products that may be developed.

It is worth noting that in the Basque Country most visitors visit Bilbao, San Sebastian, the Coast of Gipuzkoa and the vineyard area of Rioja Alavesa. Those are the hot spots. Hence, part of the aim of the strategy is creating products, experiences and then marketing them well so that visitors further explore the territory and discover new experiences and areas of interest that would compel them to return in the future and keep exploring.

7. GOVERNANCE

Deploy a new management and governance system, based on information, transparency and trust and that promotes greater institutional coordination between:

- **the different levels of the Basque administration that develop tourism policies**
- **the private agents that carry out activities in the sector**
- **and the citizenship in the forums for deliberation, consultation, advice and decision-making on tourism policies.**



It is important to understand how the Basque Country Governance works and how it affects its tourism development as there are significant areas for improvement here.

A given small municipality barely has someone concentrated on tourism development, so they rely on the Rural Development Agency. These agencies aim for the development of the first, second and third sectors (agriculture, fishing, industry, services...), and they are financed structurally with the quotas each municipality of their county pays. A given country might have 7 to 16 municipalities with the quotas related to the volume of population of each municipality.

The structure of the agencies are small with limited resources. It can result in low staff levels who can sometimes be underqualified and inexperienced in the areas of knowledge regarding competitiveness, innovation, digitalisation, entrepreneurship, planning and sustainability.

In order to support these agencies, the next two levels of government, the Provincial Council and the Basque Government provide subsidies. The issue is that these subsidies are very specific for certain type of activities, namely that the agencies need to do that extra work to receive those subsidies. For example, to create a food festival, the agency has to organise that food festival in order to obtain that subsidy. It results on these agency teams being overburdened with work and consequently not being able to communicate often to the municipalities and tourism companies they represent.

MARKETS

The plan also identifies the key international and national markets:

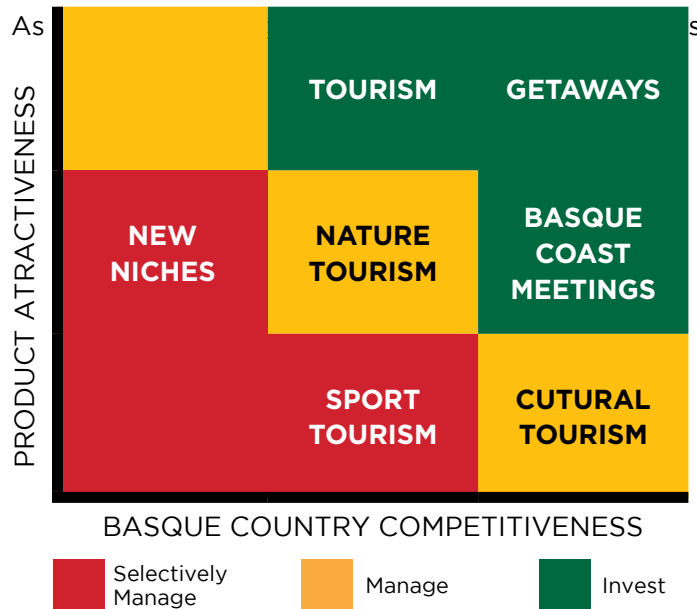
Type of focus	International market	National Market
Strategic countries/ Autonomous Communities	Germany France UK	Madrid Cataluña Basque Country
Emerging countries/ Autonomous Communities	Italy United States Northern European Countries The Netherlands	Andalucía Castilla y León Comunidad Valenciana

Source: Plan Director de Turismo de Euskadi, 2020

PRODUCT FOCUS

When it comes to product focus, the Basque Country’s tourism marketing plan 2017-2020, states that, in order to position its product offering, attract higher-performing customers and alleviate seasonality, the Basque Country must develop products for various segments. The challenge is to decide which segments to target, which market segments are most attractive for the key markets and how well prepared the Basque Country is to compete in them. To select the products, a prioritisation matrix was developed as part of the Master Plan that combines attractiveness and competitiveness factors.

Basque country’s strategic tourism direction per product type



Source: Plan de Marketing del Turismo Vasco 2017-2020

and Getaways, then on Food Tourism, Basque Coast and Meetings products. These stand out as sectors that should be valued and communicated as a priority to the target markets that have been defined as part of the strategy.

It must be borne in mind that as part of the survey conducted by Basquetour (Basque Tourism Agency) to conduct this study, they specifically explained that when they refer to food tourism they are NOT aiming for the little market share worldwide that decide to travel specifically for food activities such as eating at Michelin star restaurants, experiencing extraordinary refined tastings of selected wines or cheese.

Why doesn’t Basquetour aim for those? Because the size of that market is significantly small and requires a significant investment. Basquetour seldom targets these audiences, only when doing campaigns in selected urban areas of key markets such as Milan, Paris, NYC, etc. In the rest of their marketing activities, food plays a supplementary role to visitors whose main purpose to come to the Basque Country might be itineraries, getaways, etc. And therefore tasting pintxos, eating at restaurants that explain Basque cuisine is a bonus. Those are activities they do but not their main purpose for coming or in making the decision to come.



2.2 SPECIFIC FOOD TOURISM STRATEGY

The Basque Country's Food Tourism Strategic Plan, developed in 2009 and published in 2010, aims to make the Basque Country one of the leading international food and wine destinations, by creating a diverse, wide and unique range of products and services related to gastronomy and wines, suitable for all audiences and linked to the territory and to the Basque culture itself. This plan was revised in 2016 but the areas of focus still remain the same to this date.

In this plan, the following main areas of focus can be identified:

1. Develop an enogastronomic tourism product, associated with the full potential of the Basque gastronomic culture and lifestyle.
2. Create a tourism product related to gastronomy that includes all stages of the food chain from their origin to the table.
3. Promote the development of innovative and unique activities that contribute to the positioning of the Basque Country as a gastronomic destination.
4. Create tourism products that contribute to the socio-economic development of all territories, promoting the local economy and territorial balance.
5. Attract greater tourist flows motivated by gastronomy.
6. Promote consolidated products and destinations for gastronomic tourists.
7. Generate new alternatives for the primary and secondary sectors.
8. Contribute to the promotion and development of Basque products.

One of the key learnings here is the work done as part of the diagnosis prior to the strategy. In 2009 Basquetour did extensive work to find out and match the type of products that are key to Basque Cuisine. Where are they produced? Where are they sold? Are there experiences worth trying? Or work selling? The result of these work can be summarised in the gastro map below.



The diagnosis was very complex because there were and still are many agents. It implied the identification of primary, secondary and tertiary agents, defining what role they were going to play and how, defining how to operationalise all agents, defining the product club model, writing handbooks with requirements that had and still have to be met. Moreover, a tourism label was developed.

A decision had to be made between an open system 'welcoming agents' or a closed system 'selecting agents'. The choice made was an open system, in order to avoid criticism on the alternative, which would include justifying why some and not others were chosen.

Despite been open, the members of the product club named Euskadi Gastronomika <https://www.euskadigastronomika.eus/en> have to go through the process of implementing the handbooks, in order to make sure they are using local products and local recipes. Hybrid cuisine is allowed, actually encouraged so that there is innovation. But the link to the Basque roots has to be clear, and also a commitment to communicate these roots to customers who wish to learn about it. Hence, the core of the product club and the quality stamp with the same name is primary, secondary and tertiary agents that maintain the essence of the Basque gastronomic identity.

The way it works is that a company requests to join, follows the auditing process, implements the handbooks and conducts a final audit. And if successful, the stamp is given to the company for it to make it visible in its website, headquarters, social networks etc.

This open approach has resulted on more than 740 companies as part of Euskadi Gastronomika, which is enough

critical mass to have their own Basque Gastronomy 'tripadvisor' <https://www.euskadigastronomika.eus/en> as they call it in Basquetour.

However, these are too many companies to monitor that the handbooks are being followed. The auditing process is random every year, auditing only 30% of them, as this requires a significant budget.

Currently, Basquetour wants to strengthen their relationship with companies, in order to listen to them more, know their needs, communicate better what Basquetour does and how it can help the companies. Basquetour conducts marketing campaigns, fam trips, participates in trade shows and different networking events, and for all of those, they select agents from the club. The inference being that membership of the club provides income and visibility.

The issue is that most companies when thinking about a return on investment from being part of the club, they expect a ROI in the short term and continuously.

As this matures, the idea would be for the companies to sustain the club on their own, which means a business model of paying to be part of it, because currently membership is for free. But for that to happen the companies would have to be conscious of the benefits it has for them. This is the aspect that Basquetour is working on at the moment.



INVESTMENT AND DEVELOPMENT OF FOOD TOURISM EXPERIENCES

There is no clear direct investment towards food tourism. However, the Department of Economy and Infrastructure developed a gastronomy and nutrition plan for 2017-2020 which includes certain food tourism topics in their strategic objectives. This plan, although not directly related to tourism, sets a general budget for €2.457 billion. Out of that figure, €357 million is provided by the Basque Government and €2.100 billion is financed by private investments.

Such a substantial investment demonstrates that food tourism is not only important or relevant for the tourism department of the government, but also for other departments like economy and infrastructure which focuses on the wellbeing of the Basque society as well.

The example is the aforementioned Product Club Euskadi Gastronomika as a public driven initiative formed by more than 740 Basque companies. Two significant outputs of this are:

- the recently launched site <https://www.euskadigastronomika.eus/en> where clients can find experiences to be tried, products to buy and restaurants or bars to eat at.
- the Gastromaps that are the envy of many DMOs (Destination Marketing Organisations) in Europe, because it helps prospective visitors/customers to quickly understand which products are connected to which places, which encourages visitors to move around and consume.

in 2019, as part of an Interreg European project (POCTEFA) named Gaturi, formed by Basque Country, Navarra, La Rioja and the Southern part of Aquitaine (France) these DMOs are conducting the following:

- detecting products, experiences, geographically linked.
- creating gastronomy routes for visitors to follow (purchase) and for companies to develop.

They are now in the process of developing these routes for presentation in 2021.

BRAND PROPOSITION - KEY MESSAGING

The plan, Basque Tourism Strategy for 2020, states that the essence of the destination brand for the Basque Country has two clear axes, and it proposes consistency in the communication of both.

a) Axis 1: The Basque identity and lifestyle.

This axis is based on a series of differentiating attributes:

- World-renowned cuisine rooted in the identity of the destination. “Gastronomy to be savoured/tasted”.
- Basque character: honest, serious, quality of life, etc.
- Strong identity: own language, Basque rural sports (traditional activities conducted by the agricultural sectors that were transformed into sports are part of our folklore), history, mythology, cultural transformation, modernity, etc.

b) Axis 2: The diversity of the destination.

- Vanguard cities
- Rural environment (15 minutes away from urban areas)
- Basque Coast
- Rioja Alavesa vineyards
- Easy to get around (Maximum 2 hours)
- Multi-motivational



From Basque Job to Traditional Sport

The brand is also made up of tangible attributes and the destination’s own personality. Its tangible attributes are based on the spectacular beaches and natural landscapes, the vital gastronomy and the unique tourism experiences. And the destination’s own personality is based on its hospitality, friendliness, security and the relaxing atmosphere of the destination.

FOOD CLUSTERS

The product club ‘Euskadi Gastronomika’ represents the food network and is also supported by the ‘Basque Culinary Center’ University initiative.

Euskadi Gastronomika

Euskadi Gastronomika is the brand of the Basque Gastronomy Tourism Product Club. It is not just a brand, but it works as a tool to bring together all the agents of the sector under the same management system and methodology in order to combine the experiences/products of three territories in a unified offering. The project pursues the “experiential key” that tourists seek today, providing the possibility of visiting a market led by a great chef, participating in a cooking workshop or participating in a wine tasting. It is a public-private collaboration “in which the entire community participates, a ‘network of networks’ that integrates all capitals and regions to build a tourism product. (Euskadi Gastronomika, 2020)

To be part of the Basque Gastronomy Tourism Product Club, companies interested must submit an application available on the club’s website for evaluation. The companies that are part of the club must have strong Basque gastronomy values, at least half of their product offer has to be strongly related to traditional Basque cuisine. Some companies who are not fully aligned with the requirements are allowed to be part of the club as long as they fulfil them in a certain period of time. At the moment there are around 740 companies who are part of the club. To make sure that the companies adhere to their promises and requirements every year, the club audits, randomly, 30% of the companies. The following graphic shows how Euskadi Gastronomika is structured:

Euskadi Gastronomika Structure



Euskadi Gastronomika (EG) is composed by companies from the primary, secondary and tertiary sectors. These companies fall under the following categories: Restaurants, Grills, Bars, Cider Houses, Rioja Alavesa Wineries, Txakoli Wineries, Cheeseries, Producers, Conservers, Museums, Interpretative Centres, Craft Beer Businesses, Activity Companies, Bakery Stores, Gourmet Stores and Markets. When this brand was created in 2010 as part of the food tourism action plan, the main focus was in finding products that were part of the identity of the destination, this is the main key to its success, creating a network of identity products for the destination so that the visitor can have a taste of the Basque Country’s culture.

The club has a lot of partners to help develop its activity, these partners are some of the most recognised food groupings in the destination: The Basque Gastronomy Academy, Gipuzkoa’s hospitality industry Association,

Bizkaia's hospitality industry Association, Ciderlands Makers & Lovers, Basque Beer, Gasteiz on, Gastromuseums, Sagardi Group, Jakitea, European Cheese Route, Cider Route, Sagardun, SEA Hostelería.

The aim of the brand, EG, is to have the traveller buy the destination's local products, for this, first of all they have to eat or taste the product, then, live the experience which includes the mentioned tasted or eaten product and finally buy the product. A good example can be found in Azurmendi Restaurant a 3 michelin star restaurant which gives the customer the opportunity to be part of a guided tour through the vineyard just below the restaurant, then eat the full Michelin star menu and finally, buy the product at the restaurant's own store.

Basque Culinary Center

The Basque Culinary Center is a pioneering academic institution developed by the Mondragon University (a private cooperative model university). It also has an International Council with the involvement of eleven of the most influential chefs in the world. The purpose of the Basque Culinary Center is higher education, research, innovation and promotion of gastronomy and food. The Board of Trustees of the Basque Culinary Center Foundation is represented by:

- Institutions
- World renowned chefs
- National and international companies

The first key element to the success of these groups is the local sophistication. As Porter explains on its competitiveness theory, having a local demand with a discerning taste, in this case, contributes significantly to the territory being competitive on gastronomy.

This results in a full supply chain that looks to please that demanding palate, producers of the local product, cooking appliances, chefs, etc. It is not coincidental that the high concentration of Michelin stars per square kilometre in the Basque Country is one of the highest in the world. The supply chain works because it caters to local, state-wide and foreign customers.

Evidently without marketing actions that communicate this gastronomy, nobody would know about it. The key here is that the content for that marketing is relentless as the value chain keeps organically creating content. Chefs innovate, cooking appliances innovate, university innovates, so when thinking what to "market", the content is right there. It pivots on authenticity and on real people that are enthusiastic about it, so it is a win win when communicating.

Basquetour, the provincial councils and the capital cities' councils communicate based on this content. So, from this work the "Basque cuisine" brand emerges, from strong pillars, the chefs and the Basque people that push them to upgrade and innovate. To do this also, the kitchen itself has been fundamental, the one used in the past, and the current ones, based on its roots but without losing sight of innovation and evolution.

Not only do the public administration communicate, the chefs themselves have been amazing natural ambassadors of the Basque Country gastronomy worldwide, with their investments internationally, with their participation in conferences, events, winning recognition prizes, keeping their Michelin starts, etc. Also opening their doors to the public administration to collaborate and to local, state and foreign journalists, trade professionals etc.

The public sector has helped, not just with many marketing campaigns, but also with the creation of the product club and the stamp, the event San Sebastián Gastronomika, and the Forum with the UNWTO precisely themed around gastronomy, trade shows, fam trips in both ways, tv shows, etc.

Another key element, connected to the palate of the local community, is the diversity of the offer. When visitors come to the destination, they can opt for a popular, close and social proposal such as pintxos, or for a traditional restaurant with high quality products. But in addition, they also have the option of living unique experiences in gastronomic temples recognized worldwide for their innovation. The offer for those who visit the Basque Country is diverse and of quality.



Another piece of success is the Basque Culinary Center on its own. Firstly because there is a key mixture of worldwide renowned Basque chefs and innovation, research and education. But for it to be successful they had to market it, and this marketing predominantly in Europe, the Americas and Asia has significantly contributed to the Brand on its own.

FOOD COLLABORATION, NETWORKING AND VALUE-ADDED EXPERIENCES

Public Administration

Public administrators are continually carrying out collaborations with local producers. These collaborations take place every time that the destination participates in a tourism fair, at national or international levels. This helps the destination with its food tourism promotion within domestic and international tourism when networking with the different tourism agents at the trade shows.

Sareko

12 ecological producers from Gipuzkoa and 20 restaurants from Donostialdea make up Sareko. This initiative works to connect local producers and the hospitality sector, from the countryside straight to the kitchen. Through this network, they have created an online catalogue with ecological and local products, where the adhered hospitality establishments choose their shopping basket, which is distributed to any of the three collection points that Sareko has in the territory. (Donostia Sustapena, 2020)

Products around Cider

Cider is an identity element of the Basque gastronomic culture, which is linked to other identity elements, such as the Basque coast. This is used to generate tourism products with high added value. These products are born from private companies that collaborate with each other (cheese factories + cider houses or water active tourism activities + cider house).

These companies might offer a one day experience or through a partnership with an incoming agency the package could be enhanced to include accommodation and other activities. Since, this kind of collaboration is what the public sector is aiming for, not necessarily the packages, but the collaboration among companies to link the different experiences to one another, these linkages are usually visible in the marketing campaigns the different public administrations promote.

- **La sidra y el Mar (Cider & Sea)** is an added value experience for the destination, it was created by private tourism companies to bring together two of the most important motivations for tourists when deciding to visit the Basque Country, Gastronomy and the Basque Coast. The experience consists of a six hour guided tour in which tourists get to: go to visit the Donostia-San Sebastián Aquarium, embark on a boat trip through the bay of “la Concha”, take a tour through the Basque Cider Museum and then get to have a cider tasting experience. At the end of the experience, visitors have lunch or dinner, depending on the time of day, in a traditional cider house.
- **Ondramuño Cheese Factory (Idiazabal)**, Sagardoetxea and lunch at cider house. Savour the authentic taste of the Basque Country and learn about the origin and process of making Idiazabal cheese and Basque cider. First, the customers will visit the Ondramuño cheese factory (Idiazabal) to learn about how cheese is made by the well-known Aranburu family. Then they will delve into cider culture with a visit to the Sagardoetxea Museum in Astigarraga, and to finish the day, they get to enjoy lunch at a traditional cider house. It is an ideal experience for lovers of cuisine, traditions, and customs.

There are several DMCs (incoming agencies) based in the Basque Country that work closely, with wineries (red and white (txakoli)), restaurants, hotels and active tourism companies in all three provinces so that there are well rounded experiences for leisure and business visitors.

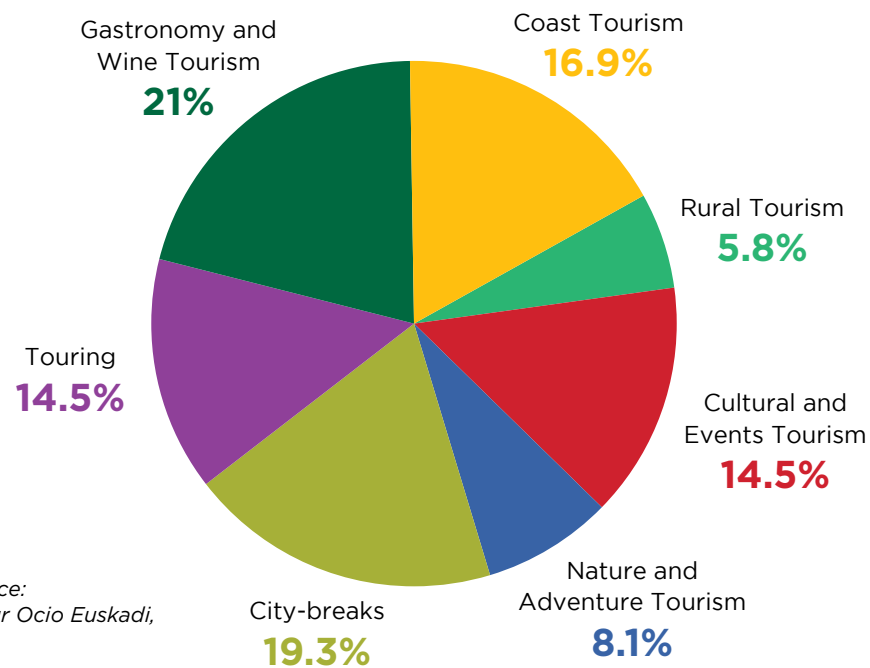
Pedro Subijana, a very well-known 3 Michelin star chef and actual director of the Akelarre restaurant in Donostia-San Sebastián, decided, in 2017, to integrate a hotel to his 3 Michelin star restaurant. This has become one of the best examples of integration of the food tourism and accommodation in the destination, turning the experience into a food tourism product as a whole.



2.3 ROLE OF FOOD IN THE VISITOR EXPERIENCE

According to the latest tourist motivation study published in 2019, the first thing that motivates tourists to come to the Basque Country is gastronomy and wine (21%) followed by the cities (City-breaks) (19.3%) and Coast Tourism (16.9%). The complete motivation distribution is illustrated below:

Main purpose to visit the Basque Country



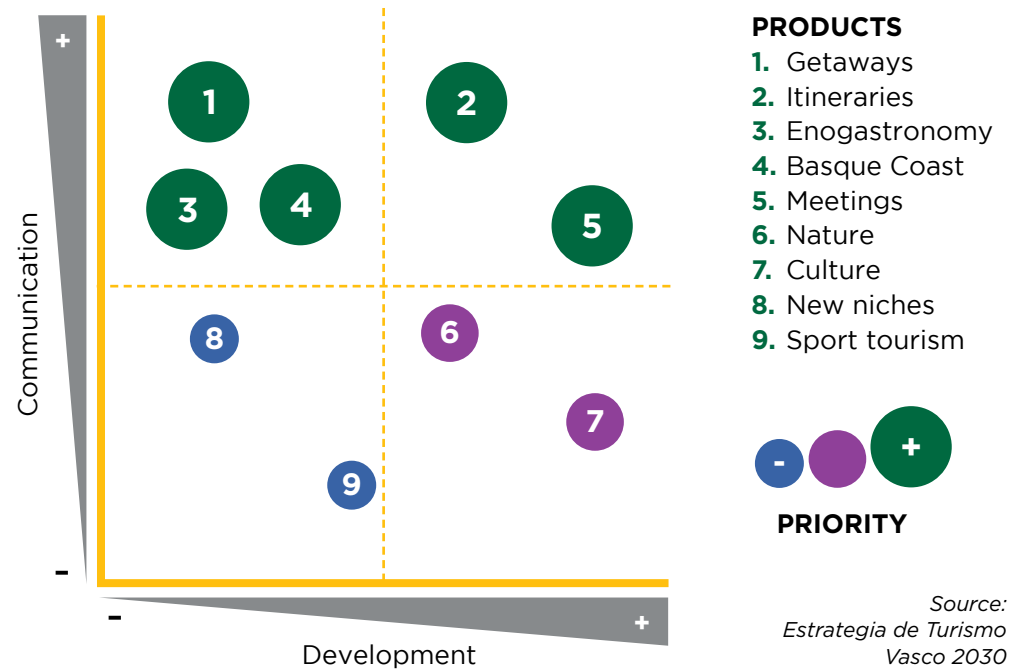
Source: *Ibiltur Ocio Euskadi, 2019*

This graphic shows the importance of the role that Basque Country's food tourism plays as it is the main motivation for visitors to visit the destination.

2.4 MARKETING COMMUNICATION AND DIGITAL PRACTICE

The Basque Country's marketing plan for tourism 2017-2020 identifies its communication priorities:

Communication Strategy's priority products



This graphic shows that one of the destination's priorities is communicating its enogastronomic tourism, but without prioritising its development.

As it is so well known in the destination and the biggest motivation for the tourist to visit the Basque Country, the promotion of its gastronomy is not focused to reach specific food tourism visitors, it is focused to reach all of the destination's potential tourists. The evidence of this promotion can be found in the destination's promotion campaigns across all of their social media platforms.

www.youtube.com/watch?v=WSuXnNeqAxw

www.youtube.com/watch?v=wplCGy5x6pw



www.youtube.com/watch?v=xpzsCHvUGg0

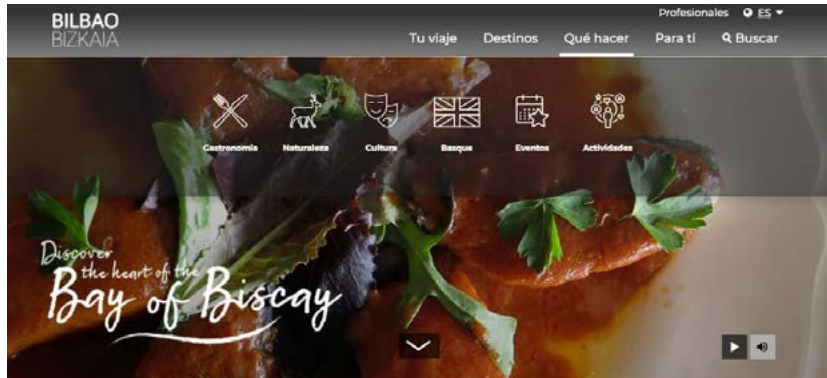




It is also important to point out that, across all the official websites of both, the destination as a whole and its three territories; gastronomy has its own separate section, which shows that gastronomy is one of the destination’s main product focus as it states in its destination strategic plans.

In addition, taking food tourism promotion to a national level, the Spanish foreign trade institute (ICEX) has recently announced a new campaign to promote Spanish food products internationally: Spain Food Nation.

The Spain Food Nation campaign highlights the quality and excellence of Spanish food, and provides market agents with all the information necessary to promote the international marketing of Spanish food. The Ministries of Agriculture, Fisheries and Food and Industry, Commerce and Tourism have signed a collaboration agreement to carry out the promotional campaign in around 20 international markets to strengthen the foreign image of the Spanish agro-food sector. The Government has allocated four million euros to its commitment to promote and give greater visibility to foods from Spain, such as olives, olive oil or wine, which are among the products most affected by the COVID-19 crisis or the tariffs imposed by the Trump administration.



To complete the media campaign, six documentaries will also be produced for the Euronews television channel which broadcasts in 12 languages and has a presence and reach in 160 countries on four continents: Europe, America, Africa and Asia.

2.5 FOOD AS A DIFFERENTIATOR

UNWTO & Basque Culinary Center's Gastronomic Forum

At this two day event, international experts analyse and discuss the influence and capacity of gastronomic tourism to create employment, promote entrepreneurship and increase its potential in the future. In addition, the speakers shed light on the most relevant competencies for this type of tourism, which promotes synergies between emerging companies, promote the inclusion of disadvantaged groups or consider digitalization. (UNWTO, 2020).

This event is financed by the Ministry of Industry, Commerce and Tourism of Spain, the Tourism Department of the Basque Country Government and Basquetour (Tourism Agency of the Basque Country Government), the Provincial Council of Gipuzkoa, and the Municipality of San Sebastián. This event, apart from its direct impacts, greatly enhances the gastronomy branding of the Basque Country.

In addition, the Basque Culinary Center and the UNWTO have worked together and published a guide for the development of gastronomy tourism. This guide was published in May 2019 and it aims to empower destinations, providing them with the necessary knowledge and indicating the appropriate processes for the preparation and application of a food tourism plan. The guide includes both,

recommendations on planning and management aspects as well as possible interventions and actions by national tourism administrations, national tourism organisations, and management organisations of tourism destinations. It also addresses, among other topics, the promotion of the value chain, the development of education and skills, the analysis of competitors, the image of the destination, and the management and monitoring of the destination advances.

Basque Culinary World Prize

The Basque Culinary World Prize is an annual global award co-founded by the Basque Government and the Basque Culinary Center in 2016. A prize of €100,000 is granted to a chef whose work has a wider socio-economic benefit. The winner is expected to use the prize to a project of their choice that demonstrates the wider role of gastronomy in society (BCWP, 2020). Once again, the communication the media does on this prize impacts on the branding of the Basque Country and its connection to gastronomy.

Basque Academy of Gastronomy Awards

These awards are annually organised by The Ministry of Culture of the Basque Government since 1992. The awards are given in recognition of the work carried out by individuals, groups or institutions for the enrichment, recovery and development of Basque gastronomy as a great cultural value (Basque Academy of Gastronomy, 2020).





SECTION THREE

CURRENT SITUATION
DURING COVID-19

3.1 DESTINATION AND INDUSTRY RESPONSE

Best practice in the response to COVID-19 is at Spanish government level. This saw the quick development during April and May 2020 of guiding principles that were practical for companies to be able to reopen as soon as the restrictions were lifted.

SPANISH GOVERNMENT

The aim was: companies doing it well and working safely. The guiding principles require every company to have a contingency plan, study all processes within the company to minimise contact, maintain distances, clean surfaces, equipment and the like to be able to protect staff and clients. This was exemplary work done. However, the certification process was managed by the Quality Institute of Spain rather than a State body or working group. This resulted in tourism companies requiring to pay for their accreditation at a time when many companies were under tough financial pressure.

The guiding principles developed by Spain were cited in Europe and by the WTTC to support other countries.

BASQUE COUNTRY

At the time the COVID-19 outbreak was taking hold, an election was scheduled in the Basque Country for April (subsequently postponed to July). Therefore, the government decided against preparing a plan that perhaps the new government may not want to follow. In lieu of a plan, the main responses were:

- Numerous meetings with public sector at Spanish level and different levels within the Basque Country, to understand the depth and extent of the impact of the pandemic.
- Numerous meetings with the private sector representatives of all industries to comprehend the scale of the impact of the pandemic.

- Study on the impact in the different industries about the first months of the pandemic.
- Spring campaign and Summer campaign: The spring campaign was directed towards international markets to remind them that the Basque Country still exists whereas the summer campaign was addressed to the feasible travel markets (e.g. Basques, Spanish residents). In spring, the campaigns were promoted through at least three languages (Spanish, English and French). The Basque Route was specially promoted. In Summer, the entire focus of the campaigns through Spanish and some in Basque, was on Euskadi, by means of nostalgia 'in the hope of meeting again' and on Euskadi as a safe destination.
- Financial aids.

At provincial level, a Tourism Plan under COVID-19 situation was developed by the Bizkaia Provincial Council and its Bilbao Bizkaia Action Groups (BBAG). As at Basque Country level, there was a process of listening and then planning quickly to try to act rapidly.

Goals:

- Mitigate the effects of COVID-19 in the tourism industry with direct aid and subsidies.
- Stimulate local tourist demand and recover nearby markets.
- Maintain positioning and opening of priority foreign markets through reverse actions and digital marketing.
- Design new strategies for tourism for the next four years based on the current situation of the sector and the new post-COVID-19 scenarios.
- Main action programs:

Urgent:

- Aid and subsidies to promote and improve in the short term.

High Priority:

- The development of the destination and the tourism industry
- Project to stimulate local demand through tourism plans and activities and the issuance of bonds
- Destination tourism promotion program 2020-2021 together with the Bilbao Bizkaia tourism industries

Short-term activation strategies:

- Retention of congresses, fairs and conferences and promotion of events adapted to new regulations or requirements
- Renewal of the Bilbao Bizkaia strategies towards 2025 and redesign of the destination's tourism brand

The main practical measures were dialogue with the private sector to listen to their needs and requests, allowing development of plans and the launching of subsidies and consumer vouchers. Measures also included the development of a website with experiences offered by the private sector and a marketing campaign for Basque people, neighbouring Spanish Autonomous Communities and southern France. It was reported that companies were not really satisfied with the subsidies nor the bonds because the quantities were very small for a long-lasting crisis, and vouchers were not being used by the customers.

Bizkaia Provincial Council

The Bizkaia Provincial Council allocated €1.15m for businesses that were forced to close due to the restrictions and €2m for consumer vouchers that are valid until May 2021. They have reserved more budget for new subsidies further down the line.



GIPUZKOA Municipality

Reactivating Tourism Plan during COVID-19 pandemic

CRISIS PLAN: AXES AND PROGRAMMES.

Total investment: €2,400,000

1st AXIS. PROTECT:

- COVID-19: Support programme for the self-employed and SMEs in the tourism sector. t€300,000
- Nominative grant program of tourist agents. €600,000

2nd AXIS. PREPARE

- Programme for the creation of safe environments. €100,000
- Post COVID-19 restart program. €200,000
- Programme to rediscover and detect changes in markets. €100,000

3rd AXIS. PROMOTE:

- Communication programme "Bertan duzu" or "There you have it" meaning that you do not have to go far to enjoy). €100,000
- Incentive programme to visit Gipuzkoa. €600,000
- Promotion of the programme "Divulgando Gipuzkoa 2021" (Spreading Gipuzkoa). €100,000
- Tourism office positioning programme of Gipuzkoa as the backbone of the territorial dynamism. €300,000



VITORIA - GASTEIZ

Economic Reactivation Plan Vitoria-Gasteiz:

- Aid for the economic reactivation of tourism:
- Protection of small businesses, hotels and local hotel establishments.
Objective: Investment and digital transformation of commerce and hospitality.
Total investment: €445,000
- Aid for Tourism promotion of Vitoria-Gasteiz:
Objective: Strengthen the Vitoria-Gasteiz brand as a sustainable tourist destination.
Total investment: €40,000

If the other budget allocations were deemed insufficient, there is no surprise that in the case of Vitoria this was the case as well.

Overall, there were no specific measures regarding gastronomy. Restaurants and bars have been forced to close the longest periods, at times allowed to work as delivery only. As indoor attractions, wineries have suffered through the loss of tourism visits, and on the core business model of selling wine because of the Spanish market's closure of restaurants and bars and any exports simply taking longer for delivery.

3.2 BUSINESS SUPPORTS AVAILABLE

The range of business supports implemented in the Basque Country are outlined below:

a) financial support for self-employed, micro companies and small companies whose activity has been reduced to 75% during the outbreak (month by month). Recipients could receive up to €3,000, however they were asked to remain active four months after the 'state of alarm' ended. This aid expired in June and the total budget for the aid was €7.5 million.

The candidate recipients of the aid were:

I. Self-employed, Communities of Assets and Civil Societies, micro and small companies whose activity is tourism and/or catering, with fiscal and social domicile, as well as a work centre, in the Autonomous Community of the Basque Country; and whose activity has been totally suspended or their monthly income between March 14th and April 13th, 2020, in relation to the same period of 2019.

b) The Provincial Council of Biscay came out with financial aid for self-employed people and small and medium-sized companies that have been affected by the COVID crisis, in addition to those sectors that will suffer a greater negative economic impact that will last over time. The maximum amount of aid to be granted for the

totality of the expenses submitted for the subsidy shall not exceed €4,000 per person or subsidised entity. 100% of each of the concepts always presented will be subsidised as long as the maximum amount of aid is not exceeded.

c) The Provincial Council of Gipuzkoa put together a budget to help tourism companies' structural and working capital expenses that, as a consequence of the state of alarm produced by the COVID-19 coronavirus, cannot be passed on to the sale of the tourist services that are the object of the company's activity. The financial aid covers a maximum of 80% of the company's structure and is divided as the following:

- €2,000 per company in the case of a self-employed person without workers in their charge
- Up to €3,500 when the company has two or three workers
- Up to €5,000 when the company has four or more workers

Excluding provincial funding, the Basque government assigned a total budget of €7.5 million as a financial aid for the destination's 25,910 tourism companies. This compares with Catalonia which allocated a total budget of €3.5 million, across a total of 113,950 tourism related businesses.





3.3 ROLE OF LOCAL GOVERNMENT AND INDUSTRY GROUPS

The Department of Tourism, Commerce and Consumption of the Basque Government has put into circulation a total of 966,250 vouchers, 466,250 vouchers for the hospitality and tourism sector and 500,000 for commerce as of October 28th. A first-time voucher initiative for the tourism sector, which it plans to inject €8.7 million into the market. It will mobilise a minimum of €26 million in purchases, as indicated by the head of said department, Javier Hurtado, and its objective is to stimulate consumption in the Basque country, by the Basque people.

The vouchers are coordinated by the Department of Tourism, with provincial councils, city councils and the Association of Basque Municipalities (EUDEL) and are based on a discount voucher model. The management of the vouchers is carried out by the Chamber of Commerce and a technological platform that the chamber has outsourced. Establishments must request their adherence to be part of the voucher programme and provide a responsible declaration.

There are two different types of voucher "Euskadi Turismo Bono" for the tourism industry, and "Euskadi Bono Denda" for commerce. The vouchers for each one of

them are different, for the tourism industry there are three discounts: 5, 10 or 20 euros depending on the purchase. For commerce there is only one type, €10 discount for every €30 spent at the chosen store. For both vouchers the maximum vouchers per establishment that a person can get is two, with a maximum discount of €40 per person.

They may be purchased by those over 18 years of age who are residents of the Basque Country and by tourists visiting the Basque Country. There will be no physical vouchers, as they have opted for no plastic policy, the customer can use the voucher at the moment of the purchase in the establishment, the employee has to make sure that the customer resides in the Basque country and has to take his/her ID. This information will then be given to the public administration in order to refund the total amount of the voucher.

This digital method was seen as a setback for implementation and it has result on a low level of adherence by the sector and by the customer. The society and the companies are not as digitalised as one would think. That is the lesson learned here. The model with a physical card, preferably not a plastic one, is considered would have had better results.

3.4 NEW INCENTIVES DEVELOPED IN THE DESTINATION

Underwater Wine Crusoe Treasure



This is the first underwater winery in the world. They explore the territory in search of the most unique vineyards to create special wines in their laboratory, which reflect the influence of the sea to the maximum (Crusoe Treasure, 2020). The experience that is sold by this winery is a wine tasting of their own wines on a boat. During the pandemic the experience was not available to the public due to government restrictions and they decided to take their wine tasting experience to the people's homes. They created several wine packages that could be bought online and they delivered them to the customer's own house so the customers could have their own wine tasting experience at home. This has proved quite successful. Their target audience are discernin clients with a high disposable income as the cheapest wine is around €70 a bottle. Their customers pre-pandemic usually stay at 5-star hotels.

María Cristina Hotel San Sebastián



Every year San Sebastián hosts one of the most important film events in the world (San Sebastian international film festival) and puts the Basque city at the forefront by welcoming the great directors, actors and national and foreign producers of the moment.

This year marked the 108th anniversary of the festival and the María Cristina Hotel, part of Marriott International and a place in which the great movie stars of all time who attended the festival have stayed, has paid tribute to the festival by creating a dessert and a cocktail with which they pay homage to two of its most illustrious guests. Woody Allen is the inspiration for the dessert made with dark chocolate, in combination with three chocolate shells and Bette Davis, the star that gives the cocktail its name, with Champagne, orange liqueur, brandy, sugar, angostura and gold dust. (CMG, 2020) This further positions the destination towards food driven tourists and broadens the food offer of the destination in these difficult times.

Community support



In several areas, the local community have played a big part in the reactivation of the food offer in destinations. One such initiative was undertaken by the owner of a small restaurant in the centre of Bilbao called 'Lar', which faced an uncertain future following almost two months of closure due to restrictions. Its owner came up with the idea of offering his regular customers a prepaid menu voucher - five menus for €40 or ten menus for €30 to enjoy at the restaurant when he could return to activity. Thanks to this initiative and to his loyal customers he has managed to raise €28,500.

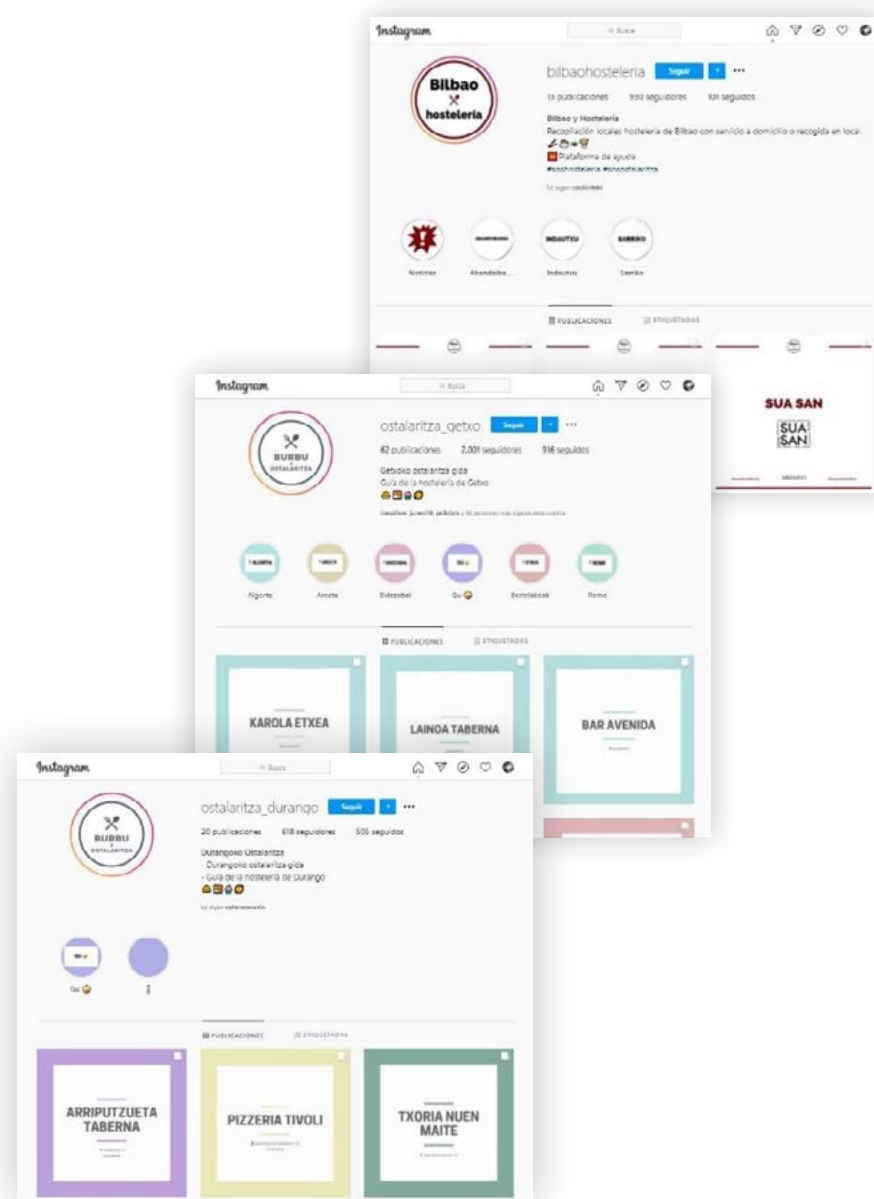
Renowned Chefs with their restaurants closed

Many renowned Basque chefs have had to close their restaurants. In order to avoid the audiences forgetting about them, they have engaged in many communication activities. Those linked with the Basque Culinary Center have embarked on virtual events and campaigns, transforming the education formats and offering prizes etc.

Throughout the COVID-19 pandemic, the Basque Culinary Center has hosted many events with well-known chefs from all over the world. One of the most acclaimed events was the one in which international chefs shared their thoughts on how gastronomy would have to adapt to these new emerging situations and challenges arising due to the pandemic. The main topics of the conversation regarding the event were focused on the impact on the catering industry, community support initiatives and the responses that gastronomy can offer to the food sector and to society in general. This was an online event, to which more than 1,000 people were connected. It was organised by the Basque Culinary World Prize (BCWP), an annual award created by the Basque Culinary Center and the Basque Government that recognises the work of chefs with transformative initiatives that are generating an impact beyond the kitchen (BCC, 2020).

Instagram as the main communication channel

In response to the tough restrictions in the Basque Country, restaurants and other hospitality industry businesses have been forced to come up with new methods to reach their customers. Some of the industry's agents have created an initiative called 'Guía de Hostelería', which means 'Hospitality Guide'. This initiative aims to communicate the different options that locals (and tourists) have in some of the municipalities of Biscay. The association has created different Instagram accounts, one for each municipality (only main ones) and they share the same aesthetic. On their profiles, they publish the restaurants that are available to deliver food and their opening times within that municipality. For a restaurant to appear in those Instagram posts, they have to message the "association" via Instagram and provide all the information necessary for them to upload it. This is a great example to give visibility to lesser-known restaurants or food businesses and help them stay afloat until they are allowed to open up again. Some of the profiles are @bilbaohosteleria @ostalaritza_gernika. @ostalaritza_getxo @ostalaritza_durango.





USE OF PUBLIC SPACE AND PLACEMAKING

No new initiatives relating to use of public space were developed specifically in response to the COVID-19 pandemic. However the following illustrates how the use of public spaces has supported the cultivation of Basque cuisine.

Mercado de la Rivera (Riverside Market), located along the riverside of the Basque city of Bilbao, has always been central to food tourism in the destination. It is also the place where locals have been shopping for food since the XIV century.

Throughout the last 10 years, the market has been fully transformed. In 2012 the facade's renovations were finished, to give the building a stable structure and in the same renovation gastro-bars were introduced to complete the food offer to locals and tourists. In 2019 its services were expanded further with a cooking school placed inside the market. This gave the offer of the market an extra added value. At the moment there are also tours which include a guided visit through the market, making the market a food tourism attraction for tourists.

This market achieves the goals of the food tourism plan as it becomes an experience on its own (guided visit), a place where tourists and locals can eat local products (at the bars) and finally, buy them in the market stands.

Basquetour organises events where traditional cooking techniques and recipes of Gipuzkoa are displayed in Bizkaia and vice versa with any of the three provinces. Customers attending the event, which is similar to a farmers' market can buy the raw materials (vegetables, meat, etc.), the final dish cooked traditionally, or related local products, local handicrafts for cooking etc. These events are mostly aimed at the Basque society to get to know their own differences territory to territory but the general public, residents of the rest of Spain or foreigners find it of interest as well.

A major focus is placed upon the location, the scenery decoration and the traditional outfits etc. For instance, in Gipuzkoa, it was traditional to cook close to the train lines so that customers would pass by and eat, so the same is recreated in Bizkaia.

VALUE FOR MONEY PACKAGES AND PROMOTIONS

A number of years before the COVID-19 pandemic a website developed and financially supported by Basquetour and operated by a DMC (the winner of a tender every year or every couple of years). On this site tourists could buy packages and products of experiences on offer in the Basque Country. However, two years ago Basquetour decided to remove the purchasing option of the site, since it was not profitable for the DMC to sustain it and it hence meant significant investment by Basquetour.

Despite this experience by the Basque Government, Bilbao City Council and Bizkaia Provincial Council jointly have launched in July 2020 a similar initiative. Called Reserva Bilbao Bizkaia which means Book Bilbao Bizkaia <https://reservabilbaobizkaia.eus/>, for tourists and locals to buy experience packages in the destination. The site was first presented on the 14th July, 2020 and launched a few days after.

The creation of the site was first proposed by the political mandate plan “Bizkaia egiten” (Making Biscay), in which the implementation of several actions would be followed until 2023. Then, due to the pandemic, it was decided to fast-track the website under the “Bizkaia Aurrera” (Biscay Forward) strategic plan to reactivate and boost domestic tourism. The main objective of the plan is to generate flows to the rest of the territory not only in the capital

(Bilbao) and the speeding up of the product website project was seen as essential in order to achieve that objective.

A great amount of work was done by the BBAG (Bilbao Biscay Action Group), specifically the group formed by the tourism industries and the group by the destinations (counties and small municipalities of the province) to detect the offer that could be involved in the project. They also mention in the interview that for some businesses, the process to be part of the project was difficult because they were not familiar with e-commerce solutions. However, the overall response was positive.

As already outlined, Euskadi Gastronomika plays an important role in food tourism. This website acts as a gastronomy TripAdvisor for both, domestic and international tourists, providing them with many options to develop their gastronomy activities in the destination. The way ahead for this site and for reservas Bilbao Bizkaia’s site is investment in marketing so that more and more residents and visitors use it.

From previous experience, invariably these initiatives end at some stage because the public administration does not see enough flows of bookings and therefore stops supporting it financially. It is quite difficult to compete with sites such as Airbnb experiences, Google Trips, Civitatis etc. Visitors do not usually search each destination’s official sites and booking facilities, they actually go to the global sites.



3.5 CHANGING/EMERGING DOMESTIC CONSUMER HABITS AROUND FOOD IN THE DESTINATION

Data published by Biscay's tourism Observatory of the summer of 2019 illustrates the following:

- **LARGE WEIGHT OF THE SPANISH MARKET:** In the case of the excursionists, it represents 89.4% of the total, in the case of tourists 62%.
 - **SPANISH EXCURSIONISTS:** 54.7% belong to the Basque Autonomous Community, in fact these are mainly from Bizkaia
 - **SPANISH TOURISTS:** Basque tourism represents 4.1%, Catalonia 18.7%, Community of Madrid 16.8%, Andalusia 13.9% and Valencia with 13.2%.
 - **MAIN FOREIGN MARKETS**
 - **TOURISTS:** Germany, France, Italy and the United Kingdom
 - **EXCURSIONISTS:** France
- Cultural activities are the main activity carried out by tourists (85.3%), and the third option indicated by excursionists (36.1%). More than 8/10 of the tourists decide to carry out gastronomy activities, this doubles the gastronomy activities carried out by excursionists that represent 4/10. Out of all the gastronomy activities, 92.2% of the tourists decide to go for pintxos, 67.8% decide to try traditional dishes, 8% go to cider houses, grill restaurants etc.

It is also important to point out that even with the destination's efforts of promoting food tourism, only 2.9% go to Gourmet Restaurants, 2.6% to a winery, 0.7% go to Michelin-star restaurants and 0.8% of the tourists take part in cooking classes or decide to live the experience of elaborating traditional products in the destination.

According to the data recently published by the Biscay's tourism observatory regarding the summer of 2020, gastronomy related activities are chosen by the tourist 95,6% of the time. This percentage increases by 13.1% in comparison to the same data from the summer of 2019. Also, the domestic market is up 25% compared to 2019 (62% in 2019, 77.6% in 2020) and the foreign market is down 41%.

As for national markets: Catalonia and Madrid remain in the same positions, although with somewhat higher shares (Catalans 23% in 2020 compared to 18% in 2019). Andalusia and Valencia fell, Castilla la Mancha, La Rioja and the Basque Country rose.

This data reflects the fact that although the tourism flow has heavily decreased (-63,62%), food tourism, for the few tourists that have visited the destination (most of them being domestic), has turned into the main activity experienced while visiting.



3.6 USE OF GUIDELINES / TOOLKITS DEVELOPED TO SUPPORT THE FOOD INDUSTRY

The Spanish Ministry of Tourism through the Secretary of State of Tourism has created the guiding principles. At the last part of that initiative, they developed a 'Responsible Tourism' seal for all those establishments that follow the Guidelines on Measures to Reduce the Spread of COVID-19 in the Tourism Sector, the only measures approved by the Ministry of Health.

This seal was first implemented in May 2020 as a response to the COVID-19 pandemic. It is a free seal that can be downloaded from the website of the Ministry of Industry, Trade and Tourism after completing a form in which the establishment must show its commitment to following these guidelines. However, there are not any inspections to make sure that these guidelines are being followed by the establishments. The seal is personal and non-transferable, and will need to be renewed each year. It is seen as another tool in Spain's strategy to reposition itself as a safe tourism destination for everyone. It is also a way to recognise the responsibility of those business leaders who make an effort to create a safe environment in their respective businesses, not only for tourists but also for their own workers and local residents.

Anecdotally, the private sector heavily criticised the seal, since anybody could download it, so the sector did not value the initiative. The other seal pictured below (with the blue circle) can be obtained if companies pay the Institute for Spanish Tourism Quality to be audited.

The key core activities are the great efforts all the autonomous communities have made to invest in training their businesses to be able to make contingency plans to face the pandemic. There is yet no clear evidence that these seals had had any effect on visitors selecting one business over another.



Figure 2 Source: Hosteltur, 2020



Figure 3 Source: State Secretariat of Tourism, 2020



SECTION FOUR

KEY LEARNINGS

4.1 KEY LEARNINGS

Key learnings identified through the research and interviews undertaken as part of the destination case study:

Pivot on local taste and styles

Capitalise on any particular taste or style the destination has in terms of discerning palate for dessert, for salty food, for fruits, for golf, for sailing, etc. It is part of your identity.

Connect products, experiences and producers

Geographically connect everyone involved on primary, secondary and tertiary sectors, the raw materials, the mid products and final products and experiences and illustrate them on a map; link them across storytelling based on history.

Develop a product club or cluster

Design among public and private sector of different geographical levels of your destination and different tourism industries invested in the incoming form of tourism, a set of criteria and handbooks to develop your product club or cluster (whichever form works best in your culture). This handbook needs to include the business model of the club, the aim, type of members, criteria, etc. These club needs to have transparent barriers of entry for quality reasons, identity reasons (not discriminating other cultures, a Peruvian restaurant that prepares Hybrid dishes with Basque Cuisine is very much welcome).

Develop and integrated Public and Private sector business model

Design a business model not dependent on the public side only. Quotas need to be met and clear return on investment needs to be there for

members to continue supporting it. It should emerge from the private side. If it doesn't, the public side should steer it but not own it. Otherwise, a dependence is created and the private sector never flies solo.

Build a strong network of companies committed to the identity of the destination

This network of companies should commit to synergies among complementary companies, accommodation + winery + active tourism company, or active tourism company + event venue + restaurant, etc. The aim is to build actual products that incoming agencies or online global platforms or local tourism offices can sell and promote. Hence, the demand would know there are many activities to do, experiences to live, taste, smell, touch. Experiences need to activate all five senses, and smell is critical to trigger memory.

Do not take digitalisation for granted

Test a pilot idea first with a range of users. As it has been seen with the case of the Basque Country vouchers, the procedure is very simple, scanning an ID, opening a site with a QR code etc. but neither most of the supply nor the general public were willing to do it as they saw it complicated with their own smartphone. Invest in digital skills at all levels, and test the implementation plan before investing on it.

Do not create booking platforms for a smaller destination

The same way most visitors do not download destinations' apps, they do not check the DMO's site as much, even less book through it. The marketing investment needed for most visitors to even be aware the site exists is significant and could be invested elsewhere, supporting companies on their digitalisation, e-commerce, digital marketing skills, sustainability and accessibility practices.

4.2 DESTINATION BEST PRACTICE TOURISM / HOSPITALITY EXAMPLES

BALCONY ROCK



In the Spanish city of Malaga, there are many hotel complexes with large gardens surrounded by guest rooms. In the wake of this condition, the Hotel Costa del Sol has proposed to organise concerts in hotel gardens with the public located on the balconies of their rooms. The hotel's gardens are large spaces in which a stage for concerts can be located, and

where the public does not even have to move from their room to listen to live music. With this initiative, they avoid the usual crowding of people in traditional concerts and the safety distance required by the health authorities is strictly respected. The entrance to the concerts is offered indivisibly with the reservation of the room with a balcony that is occupied during the performance.

The initiative projects a very positive image of Costa del Sol as a safe and innovative destination and reflects that the tourism sector knows how to adapt to adversity to offer its visitors a reliable and attractive leisure offer. Dinner can be served on their balconies if the clients so desire.

MICHELIN-STAR MEALS DELIVERED TO YOUR HOME

Dabiz Muñoz, the three Michelin star awarded chef, has recently changed his business model and gone on a business adventure. During his confinement, he was dedicated to developing new recipes and sharing the discoveries on his social networks. Then, after seeing the positive





response from the public, he decided to take his recipes one step further and deliver them to the people's homes. Like this, he has become the first Michelin star chef to take his business online and provide a delivery option to his customers. This delivery option is called GoXO and is the third leg of his business that makes up the gastronomy offer of Dabiz Muñoz, complementing the restaurant DiverXO with three Michelin stars and the more informal restaurant StreeXO.

HOST/DARK KITCHENS

In the wake of the COVID-19 crisis, many restaurants have taken their business online, providing their customers a food delivery option so they can have their favourite restaurant's meals at home. Before COVID-19 the concept of industrial spaces prepared as kitchens following all health and safety regulations already existed, and is called Host or Dark Kitchen. This has exponentially increased since the forced shut down of restaurants during lockdown periods. This means that the meals can only be delivered to the customer's home and not consumed in the place itself, since it is not a restaurant. Some chefs have opted for this model, in order to reduce rent costs related to the rental of a whole restaurant, this way; they only have to rent out the kitchen space. There are also specific delivery sites in which the customer can search restaurants, which operate under the dark kitchen business model like: www.madridghostkitchens.com

UNDERWATER WINE CRUSOE TREASURE

This is the first underwater winery in the world. They explore the territory in search of unique vineyards to create special wines in their laboratory, which reflect the influence of the sea to the maximum (Crusoe Treasure, 2020). The experience that is sold by this winery is a wine tasting of their own wines on a boat. During the pandemic, the experience was not available to the public due to government restrictions and they decided to take their wine tasting experience to the people's homes. They created several wine packages that could be bought online and they delivered them to the customer's own house. This has proven quite successful. Their target audience are discerning clients with high disposable income as the cheapest wine is around 70€ a bottle.

BUYING FOOD WITH A CLEAR CONSCIENCE

Zámpate Zaragoza is a slang way to say "Let's Eat Zaragoza" in the sense of eating the city (Zaragoza is a city of the Autonomous Community of Aragón in Spain).

Glovo, Uber Eats, Deliveroo and many others face action for allegedly exploiting delivery personnel. Society considers that they do not have a choice, and these companies benefit from it paying little for each delivery. The alternative is Zámpate Zaragoza where salaries are more thanks to a cooperative effort. This is not new it exists in other countries, but its relevance has re-emerged in highlighting social sustainability practices emerging in the middle of this crisis.

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