CASE STUDY

Fáilte Ireland
National Tourism Development Authority

# FOOD TOURISM
# SOMERSET AND NORTH DEVON

**Draft in Development**

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# SECTION ONE

# INTRODUCTION AND OVERVIEW

## 1.1 INTRODUCTION AND OVERVIEW

The scenic rural county of Somerset and part of North Devon that is within the Exmoor Tourism area (including whole of Exmoor National Park, West Somerset District and part of North Devon) are located in the South West region of England.

The whole of this area falls within the Visit Britain remit for international tourism marketing and within the Visit England remit for domestic tourism marketing and product development.

The counties (Devon and Somerset) have district councils responsible for land use and community planning, environmental health and licensing matters, economic and tourism development. As a result, there are strong, relatively, localised tourism development plans and initiatives. In this context, South Somerset District has exhibited a light touch towards any centralist approach to controlling tourism development instead operating as a facilitator and enabler for highly localised initiatives. This alone makes it an interesting case study as the focus of the innovation in tourism, both pre-and during Covid-19 has been at the community and individual business level, this is especially true in the context of food tourism.

In the case of the area covered by Exmoor Tourism, the civic administration landscape is significantly more complex with Devon County Council, North Devon District Council, West Somerset District Council and the Exmoor National Park Authority all having varying levels of responsibilities for land use planning and tourism and economic development. As a result, the tourism industry has established an overarching, single organisation, to undertake the marketing and strategic development of tourism in this area. Once again, however, the genesis of good practice in food tourism in this multi-managed area is evident at the community and business level.

Throughout the initial Covid-19 period, all tourism and hospitality businesses in England fell within the same UK Government regulations, restrictions and financial support mechanisms which lasted until October 2020. This included periods of lockdown and the summer months where restrictions were eased. From early October until November 4th, England operated a regional approach to restrictions and the associated financial support mechanisms. During this period, Somerset and North Devon were able to operate with relatively few restrictions to tourism and hospitality as their infection rates were the lowest in England and compliance was high. However, amidst successive second and third waves of the virus in the winter the area was predominantly placed under the highest level of restrictions.

It was during the summer period of relative flexibility and minimal restrictions that the businesses in the case study area flourished with innovation and creativity with the most successful building upon their approach to business that they operated before Covid-19.

### THE GEOGRAPHY

## 1.2 THE TOURISM CONTEXT

Visit Britain (VB), working with the Department for Farming and Rural Affairs (DEFRA) has undertaken research (2017) into the demand for food-related tourism for GB which found that less than 5% of all international tourists came specifically for food. However, 41% stated that the cuisine interested them and 52% thought it was important to find local specialities to assist their experience of Britain.

This follows from the 2016 VB report, *How the World Views Britain's Food1*[1] which found that there was a low association of Britain with food in general but when visiting there was a desire to experience iconic dishes2[2], 81% of respondents were willing to try a new food experience[3] and 64% would prefer to try higher quality food experiences.

It should be noted that Wales, Scotland and Northern Ireland all have country-specific food tourism strategies and, these have been in place, for at least the past ten years. There is no such country-wide food tourism strategy for England or for Visit England; instead the development of food tourism strategies is a responsibility for county or district councils as part of their economic development work or, as part of an agriculture and farming initiative.

[1] Visit Britain Foresights Report 146, 2016.
[2] Listed as (i) a full English breakfast, (ii) a regional cheese, (iii) fish and chips, (iv) a curry and a local drink – especial-ly whisky.
[3] Mostly women and those aged between 25- 50 yrs.

In summary, therefore, there isn't an overall, co-ordinated approach for the development of food tourism in England; the result is a very varied and fragmented approach. However, this has stimulated specific areas to respond in a manner that best suits their needs and the character of both their food and drink eco-systems and their tourism and hospitality sectors.

For this reason, even in the county of Somerset, the pre-Covid situation varied considerably between the two parts of this case study. Inevitably, this meant that the innovation that has taken place during Covid-19 has been highly localised and individualistic.

In recent years a public/private sector initiative to develop and promote food and drink in the county has emerged in Somerset representing a sector worth £500m a year to the county's economy (3.8% of GVA compared to the UK average of 1.5%) involving 8,500 producers and several food and drink representative bodies[4, 5]. This has resulted in a new £11m Food Hub and Innovation Centre on a Food Enterprise Zone with an associated Food and Drink Forum at Junction 21 on the M5 at Bridgewater that opened early in 2020.

[4] Association of Somerset brewers, Somerset Local Food Directors, Somerset Farmers Markets Association, Levels Best, Royal Bath and West Show and Taste of the West
[5] www.foodanddrinksomerset.org

## 1.3 TOURISM AND FOOD TOURISM IN SOMERSET PRE-COVID

There is a lack of up to date data about the volume and value of tourism in Somerset. The most recent comprehensive data set is from 2013 (a fact confirmed in the recent Somerset Economic Assessment Report 2019).

The 2013 figures showed that the County hosted 2.3m domestic and 192,000 overnight tourist trips resulting in 9.9m visitor nights together with 22.3m day visitors. The total visitor related spend was £1.25bn comprising £752m from day visitors and £498m from overnight stays resulting in a total employment of 32,000 people (23,800 FTEs) or 9% of all employment.

Across the whole of the South West of England (Cornwall, Devon, Somerset, Dorset, Gloucestershire, Wiltshire and Avon) tourism was worth £10.6bn with spending on food and drink by tourists totalling £3.4bn (32% of all spending). The counties with the highest levels of tourist expenditure on food and drink in the South West region were:

1. Devon = 21% = £714m (accommodation = 24%)
2. Dorset = 17% = £578m (accommodation = 16%)
3. Somerset = 13% = £442m (accommodation = 8%)

In all three counties the percentage of tourists' expenditure on food and drink exceeded that spent on all other items (travel, attractions, entertainment, shopping and accommodation.

In South Somerset, this 2013 data showed that the District's tourism volume and value figures looked like this:

- 268,000 domestic overnight trips and 828,000 overnights (average stay 3.08 nights)
- 25,000 international overnight trips and 185,000 overnights (average stay 7.4 nights)
- Domestic spend of £36m (average of £43 per day)
- Overseas spend of £8m (average spend of £43 per day)
- Spending on food and drink by all tourists of c£6m

# SECTION TWO

## PRE-COVID19

## 2.1 DESTINATION TOURISM STRATEGY – MARKETS AND PRODUCT FOCUS

The tourism strategy and destination management plan for Somerset (2015 -2020) has been produced by Visit Somerset which is a private-sector, community interest company, with a board of private sector leaders elected by the membership existing for the 'benefit of members, the community and tourists.'

The key focus is upon raising the level of awareness of the county as a overnight stay for domestic markets as the area has traditionally been regarded as a transit destination en-route to the more popular tourism resorts of Cornwall, Devon and Dorset. The secondary aim is encouraging a wider dispersal of tourists across the county by highlighting the assets of the Somerset inland countryside, market towns and villages thus placing less emphasis on the traditional seaside resorts of Minehead, Weston-super-Mare and Burnham-on-Sea.

In this context there is no specific mention of food and drink as anything other than a 'strength' in the SWOT analysis making a very important link between food and landscape – this is highlighted in the website (see below). There are, however, no specific actions listed for food tourism.

## 2.2 SPECIFIC FOOD TOURISM STRATEGY

Despite the absence of a formalised food tourism strategy for Somerset, the Visit Somerset visitor-facing website[6] puts considerable emphasis on artisan food and drink and its role in offering authentic, bookable local experiences, crafted by local people.

The opening references are the three iconic products of the county: strawberries, cider and Cheddar cheese and reemphasises the link to landscape and place: *"stunning orchards and pastures that are perfect for grazing…. Home to fantastic artisanal produce… from the iconic to the local, farmshops and delis brimming with regional sumptuous fare… including world famous brands all started here in Somerset such as Mulberry and Thatcher's Cider."*

There is then a series of bookable, very specific, examples of good experiences from across the county.

In South Somerset the link between tourism and food and drink is developed as a priority policy area through the District Council's ten year economic development strategy (2019-2029). This seeks to ensure the pivotal link between food processing and production and local tourism businesses with an integrated rural development approach that sees food tourism being the key to the revival of the market towns and villages. Importantly, the responsibility to drive this agenda is devolved to the Area Committees of the Council to ensure a highly localised approach. This also secures a closer relationship between land use planning, training and tourism supported by a dedicated key account manager within the economic development team – a one-stop shop designed to deliver effectively and efficiently.

[6] www.visitsomerset.org; www.visitsomerset.co.uk

### INVESTMENT AND DEVELOPMENT OF FOOD TOURISM EXPERIENCES

Examples include:

- The new Food Innovation Centre for Somerset opened in early 2020 (see above).
- Exmoor Tourism[7] has created a 'Food Detective' initiative driven by its website to encourage tourists to explore local food experiences and producers and to increase the level of spending by tourists on food and drink (at present estimated at 20% (c£20m) of all spending by 300,000 overnights stays and 1.3m day visitors).
- Across South Somerset there are numerous examples of investment taking place in the private sectors including the opening of a new farm shop at the Hauser & Wirth Somerset art gallery and restaurant, a cydery, farm shop and restaurant at The Newt, plans announced for a new rural life visitor attraction to celebrate local food and drink at The Haselbury Mill and Great Tithe Barn (see case studies later), a new local produce shop at the Kilver Court Shopping Complex at Shepton Mallet by Mulberry and a new cheese shop by Godminster Cheese.

### BRAND PROPOSITION - KEY MESSAGING

The brand proposition is founded upon quality landscapes + quality land management and stewardship = great local food and drink delivered with empathy and care and love by local artisan craftspeople.

### FOOD CLUSTERS IN THE DESTINATION

South Somerset has an impressive cluster of new initiatives that sit alongside innovation by existing operators and new investments by some of the larger, well-established brands.

There is a clear link between those businesses and individual business

[7] www.visit-exmoor.co.uk

leaders which have always exhibited innovation and creativity before Covid-19. There has also been the elevation of a number of businesses who, as a result of what they have done during Covid, have significantly enhanced their reputation and profile regionally and nationally.

These innovations are driven by individuals, often in partnership with other businesses in their established networks, and reflect a dynamic, agile and creative approach to their business model irrespective of Covid-19.

The best examples of this phenomenon are included as case studies:

## FROM THE SOUTH SOMERSET CLUSTER

The Newt Somerset, Bruton (www.thenewtinsomerset.com)

Hauser & Wirth with the Roth Bar & Grill, Bruton (www.hauserwirth.com)

The Twinemaker's Arms, West Coker (www.ciderexpert.com, www.westcoker.net)

The Dawes Twine Works Heritage Centre (www.westcoker.net)

Haselbury Mill and Great Tithe Barn (www.haselburymill.co.uk)

The Queen's Arms Country Pub, Corton Denham (www.queensarms.com)

## FROM THE EXMOOR TOURISM CLUSTER

The Periwinkle Tearooms, Selworthy (www.periwinkletearoom.co.uk)

Broomhill Art Hotel and Sculpture Garden, Muddiford (www.broomhillart.co.uk)

The tourism impact of these food clusters include:

- A generation of repeat and new visitors to individual businesses with positive impacts on their host community in terms of incremental spending.
- Quality, positive PR during otherwise negative times.
- Enhanced reputation.
- Consolidating existing supply chains and developing new suppliers.
- Retention of staff during Covid-19.
- Increased loyalty and respect amongst very local markets and near neighbours.
- Improved inter-relationship with local government officers (environmental health and licensing).
- Increased diversification of their own products and experiences.

## FOOD COLLABORATION AND NETWORKING

There are numerous sectoral groupings and interest groups at the macro-level (such as the Association of Farmers Markets and the regular South Somerset Council Information Exchange Events and Newsletter. The strength lies within strong local networks of collaboration between food and drink producers and processors with the tourism and hospitality businesses which are forged by personal relationships and trust.

In terms of innovation at the local level, there is little evidence to find a correlation between regional or national initiatives and success at the destination level.

## 2.3 ROLE OF FOOD IN THE VISITOR EXPERIENCE

In the context of South Somerset, the emergence of new investment by existing and new protagonists in product development, that includes food and drink as key elements of their larger product offer combined with a raft of new food and drink producers (and products), has raised the bar and helped elevate food and drink into a prime reason to visit South Somerset.

The emergence of new distillers, cider makers, micro-breweries, smokeries and artisan cheese and charcuteries using locally derived produce has driven the arrival of local farm shops and village stores adding deli counters across the district.

These highly localised initiatives are mirrored by the activities of some major landowners and tourist attractions such as the founder of Mulberry, Roger Saul's Sharpham Estate spelt production and Sheppey's Cider and Food Kitchen, and initiatives to use local food and drink by Michael Eavis at The Glastonbury Festival and leading heritage attractions (such as Forde Abbey and Wells Cathedral).

### MARKETING, COMMUNICATIONS AND DIGITAL PRACTICE

In the main this success has been driven by the quality and availability of great local produce by local people in a fine, carefully managed landscape rather than the lead of star chefs and TV personality cooks.

### FOOD AS A DIFFERENTIATOR

Up until the past three years, there was no real point of differentiation other than the cliched icons of cider and Cheddar cheese. Along with the general low-key marketing of the destination, there was little confidence in the overall product.

Today, the destination has matured and become more self-confident and its points of difference through food and drink comes from the setting and the overall experience which highlights the provenance and narrative of the produce sold at a local place of consumption ranging from visitor attractions, village delis as well as the typical village pub and small rural hotels.

# SECTION THREE

# CURRENT SITUATION DURING COVID-19

## 3.1 CURRENT SITUATION

There is little or no evidence available to illustrate the impact of Covid-19 on tourism and visitor spending over the past six months of the pandemic. However, in a recent report (November 2nd, 2020) by Tortoise Media[8] reveals that up until end of April 2020 consumer spending across most of Somerset was down between 39% and 50% compared to the same period in 2019.

However, the data shows that South Somerset, especially the Yeovil area had seen a *"remarkable overall increase of 4% in spending relative to the same period in 2019 making it one of only two areas in the UK to show such a response (together with Milton Keynes." Yeovil and South Somerset is regarded as "an unlikely outlier of success"*, with Bath (-59%) and Weston-Super-Mare (-52%), and both in Somerset, being two of the worst affected areas of the UK.

Significantly, Bath and Weston are highly dependent on tourism and their tourism and hospitality businesses found it extremely difficult, or were unable, to adapt to the Covid environment where as the Tortoise Media report showed that in South Somerset, food and drink (and other grocery sales) boomed (*"a roaring trade"*) by +14% due to:

- Online activity and online payment systems.
- Business adaptation including those in the hospitality sector.

[8] www.somersetliv.co.uk

## 3.2 DESTINATION AND INDUSTRY RESPONSE

The adaptations and innovations have taken place at the enterprise and business unit level. There has been little central or regional involvement. The new £11m Food and Drink Innovation Centre and Enterprise Zone has yet to have an affect.

## 3.3 BUSINESS SUPPORTS AVAILABLE

The local tourism and hospitality businesses have had the same ability to access England-wide Covid financial support packages as had every other sector and region of the UK. The subsidised dine out vouchers/discounts available during the June to August period had a positive impact. However, none of the business case studies made significant use of them – indeed two of the case studies reported that the vouchers were a disruption to their business due to: (a) displacing weekend demand to mid-week; (b) attracting a different clientele who were motivated by cheaper meals not the quality of the product; and, (c) displacement of loyal customers.

## 3.4 ROLE OF LOCAL GOVERNMENT AND INDUSTRY GROUPS

The most important contributions in South Somerset has been the willingness of the local authority officers (economic development key account managers, environmental health and licensing, and planning) to work with businesses to find solutions in a fast, agile, less bureaucratic manner and getting engaged prior to planning, licensing and funding applications were made.

The key account managers have been the critical success factor.

## 3.5 NEW INCENTIVES DEVELOPED LOCALLY

This has happened at the business level and between businesses often leveraging and exploiting relationships and supply-chains that already existed.

A key factor has been the way in which individual businesses have diversified their offer and have deployed innovative ideas and new technology to drive their Covid success.

The use of food to create 'Value for Money' packages and to promote domestic tourism, has again only been undertaken at the business level with a number of the representative bodies promoting these exemplar businesses on their websites. For example, Visit Somerset, Discover Somerset and Food and Drink Somerset.

The overall mantra in the marketing activities has been: *"Taste local, buy local, eat local and visit local".*

This has resulted in a number of the UK national newspapers picking up stories and featuring individual businesses or running theme articles in print or on-line. The Daily Telegraph[9] ran a feature on Somerset pubs with accommodation and good food whilst Visit Britain's '*Food and Drink Hub*'[10] now promotes *Somerset Flavours and Landscapes* through a four day itinerary.

[9] For example www.telegraph.co.uk downloaded 30 October 2020
[10] www.visitbritain.com

## 3.6 CHANGING/EMERGING DOMESTIC CONSUMER HABITS AROUND FOOD IN DESTINATION

Evidence of changing and emerging habits is illustrated by the following recent consumer trends:

- Desire to buy and consume more locally derived produce (local is becoming very local) from within a smaller geography.
- Desire for venues to be growing their own.
- Desire to combine a food and drink experience with an activity at a venue.
- Desire to learn more about the food and drink (source, where and how it is made).
- Desire for higher quality in terms of the food and drink total experience.
- Willingness to spend more and stay longer of the food and drink offer is right.
- Safety and security with trust is vital.
- Eagerness to get to know the people serving them - developing personal connections.
- Willingness to spend more through incremental activities on-site.
- Willingness to remain loyal and make repeat visits and promote through word-of-mouth.

## 3.7 USE OF GUIDELINES / TOOLKITS DEVELOPED TO SUPPORT THE FOOD INDUSTRY

Visit Somerset developed the COOL Toolkit to assist the development of sustainable businesses using funding derived from a community payback fund created by the building of the new Hinckley Point Nuclear power Station. However, it has not been possible to find a business that has used this toolkit.

Otherwise there are no such support materials for South Somerset. There is however a sound key account management system for SMEs (across all sectors) provided by the District Council whose priorities are to support linkages between food producers and processors at the local level with tourism and hospitality businesses in the same area thus building strength from the bottom up.

# SECTION FOUR

# KEY LEARNINGS

## 4.1 KEY LEARNINGS

The top five learnings identified in context of the destination approach to how the destination and businesses adapted are:

1. The destination needs to assist exemplar businesses more effectively and encourage the sharing of best practice.
2. At the destination level, the activity is far too generic and predictable.
3. Innovation and creativity are evident at the enterprise level with diversification of activities and expanding the products available on-site being important.
4. Local authorities becoming much more flexible, less bureaucratic and more key account focused is very important.
5. Highly localised partnerships, collaborations and supply chain development works well in Covid.

## 4.2 DESTINATION BEST PRACTICE TOURISM / HOSPITALITY EXAMPLES

The following case studies are highlighted as best practice in how they applied innovation for recovery (menu, property layout, use of outside space, technology, new business model, takeaway, collaboration with others)

### FROM THE SOUTH SOMERSET CLUSTER

The Newt Somerset, Bruton (www.thenewtinsomerset.com)

Hauser & Wirth with the Roth Bar & Grill, Bruton (www.hauserwirth.com)

The Twinemaker's Arms, West Coker (www.ciderexpert.com, www.westcoker.net) with the The Dawes Twine Works Heritage Centre (www.westcoker.net)

Haselbury Mill and Great Tithe Barn (www.haselburymill.co.uk)

The Queen's Arms Country Pub, Corton Denham (www.queensarms.com)

### FROM THE EXMOOR TOURISM CLUSTER

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