



**Fáilte Ireland**

National Tourism Development Authority

# FOOD *in* TOURISM



**Destination Case Studies**

**Future Trends  
and Global  
Best Practice**

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## SECTION ONE



# OVERVIEW & CONTEXT





# 1. Introduction





The 'Food *in* Tourism - Future Trends and Global Best Practice' report has been developed to support regional destinations and food tourism businesses in their ongoing recovery and resilience planning. The report is designed to provide insights into emerging food tourism trends at a destination level and is supported by separate enterprise level best practice analysis report. The research approach included the examination of a series of international destinations and food tourism businesses set against the context of managing through the global pandemic and preparing for recovery and building future resilience. The content of the report is designed to inform destinations and enterprises of emerging food tourism thought leadership to support their planning and future project implementation. This trend analysis is supported by research learnings and case studies from ten international tourism destinations. It includes an examination of seven international destinations in addition to a further seven individual enterprises across four different countries. The study is built on international and industry expert panel inputs to provide practical and sustainable approaches to food tourism recovery.

The impact of the COVID-19 pandemic has been severe for the tourism and hospitality sector. Its recovery will be gradual with the private sector being the worst hit. This is particularly evident among micro, small and medium enterprises who represent the backbone of Irish tourism. Food tourism represents a key component of the recovery process. It will impact on how destinations will generate local demand and play an enhanced role in the visitor experience across food service outlets from cafes, restaurants and pubs serving food. In establishing the new focus for food tourism, a programme of international research was conducted to understand future food tourism trends, destination and enterprise best practice across ten different countries.

The psyche of the general public is likely to be adversely impacted by the pandemic with concerns for personal safety and welfare of loved ones persisting for some time. Consumer sentiment towards travel, particularly overseas, will be slower to recover and visitors will have a whole new set of expectations, requiring destinations and businesses to demonstrate they are clean and safe and open for business.

COVID-19 will result in a change in visitor behaviour. It will result in visitors permanently adopting some of the behaviours witnessed in the summer months. The new visitor motivations include seeking simplicity, immersing themselves in safe environments, meeting locals and looking for value for money.

The corresponding focus on food tourism may possibly be at a similarly basic level. It will reflect increasing visitor behaviour towards getting back to nature, reconnecting with families, sharing food and a desire for simple and local dishes.

Based on these new patterns of behaviour, food tourism offers significant opportunities for many destinations to entice domestic visitors to visit and stay. Many countries and regional destinations are now increasingly recognising the value of food tourism as a tool for regional regeneration and economic diversification. The trends that emerged during and post lockdown have resulted in expanded opportunities for food tourism. There is a whole new emphasis on supporting local, from food tourism experiences to engaging with local food and drink producers.



There has been a surge in interest in what is available from local food, drink and crafts producers. As restrictions are lifted and the new normality returns, increased numbers of people will have even more interest in meeting the makers and producers and sampling local food tourism experiences. There will be increased demand for exploring the regions sourcing artisan food and meeting the producers. There will be a new interest in participation in food tourism activities from foraging workshops to local food cookery classes. Local stories told through food will become more commonplace as visitor experiences blend the heritage of place with the local food story.

A new heritage of place and nostalgia has emerged through food presenting destinations with a platform for sustainable development that will address the challenges of regionality and seasonality. Emerging tourism trends highlight the growing levels of multigenerational travel to demand for community and rural tourism experiences told through the local food story. Global tourism trends merged with new food tourism behaviour patterns highlight the significant role food will play in destination recovery and future resilience.

This programme of international research was undertaken to examine best practice activity applied to destination development and food tourism enterprise resilience. It is designed to establish emerging food tourism trends supported by a series of international case studies. The best in class approach will enable destinations and enterprises consider new ways of doing business in stimulating sustained visitor demand and innovative ways of increasing food tourism options for our visitors.

A large degree of commonality has emerged across all international destinations examined and among food enterprises engaged with during the research process. The importance of 'local' has never being so prominent in the mindset of the consumer and the industry. The richness of our food tourism experiences delivered by a world class industry will play an important role in tourism economic recovery. The international research demonstrates the role of innovation around local food and drink experiences, engaging with the local producers to the delivery of quality dining experiences.

Future destination competitiveness will be built on adopting new approaches to the visitor experiences and new ways of doing business. The approach is designed around destination and enterprise resilience. It will require business refocus and readjustment in managing the visitor journey from planning to the in-destination and on-premises experience. Recovery will require new approaches to stimulate visitor demand while ensuring new and existing experiences are 'fit for purpose'. The best in class and global food tourism trends analysis provides a suite of practical learnings that will be applicable from destination level to everyone involved in the Irish food tourism experience from producers to local cafes, restaurants and gastro-pubs.



## 2. Understanding Food Tourism

### 20 Global Trends







**AUTHENTIC EXPERIENCES**



**SEEKING ACTIVE OVER PASSIVE FOOD EXPERIENCES**



**VISITORS ARE LOOKING FOR EXCLUSIVITY**



**PAIRING FOOD WITH OTHER INTERESTS**



**SHARING EXPERIENCES AND TECHNOLOGY ENHANCED FOOD EXPERIENCES**



**MULTIGENERATIONAL TRIPS BUILT AROUND EATING TOGETHER**



**PROVIDE WAYS TO BUY LOCAL PRODUCE**



**HANDS-ON MEALS AND MAKING THE LOCAL CONNECTIONS**



**SUSTAINABILITY IS KEY**



**SUPER FOODIES - MILLENNIALS AND GEN Z**





**FOOD IS AN INFLUENCER**



**VISITOR ADVOCACY**



**SPECIAL DIETS**



**LOCALHOOD**



**PROTECTING AND SUSTAINING LOCAL FOOD CULTURES**



**ADOPTION OF DIGITAL TECHNOLOGY**



**CATERING TO THE SELF-CATERING**



**PEOPLE ARE SPENDING MORE ON FOOD AND BEVERAGE REGARDLESS OF INCOME**



**GLOBAL CULINARY CULTURE AWARENESS IS GROWING**



**FOOD/CULINARY TRAVELLERS ENJOY ACTIVE TOURISM AND SPEND MORE.**

**Note:** 'Food Tourism Trends – 20 Global Trends' is compiled through independent research analysis by Repucon Consulting prepared for Fáilte Ireland. The trend analysis is based on feedback gathered through case study interviews, food tourism business owner consultations and expert panel interviews.

## ■ AUTHENTIC EXPERIENCES

Visitors are increasingly looking for the authentic local story behind the foods they are eating. Food tourism opportunities extend from markets, restaurants, cafes to food trucks to sit-down meals of local, authentic dishes prepared in-house.

## ■ SEEKING ACTIVE OVER PASSIVE FOOD EXPERIENCES

Visitors want to immerse themselves in the delivery and co-creation of the food experience. Food tourism is increasing the breadth of options for visitors from the basic tour to new signature food experiences telling the local food story.

## ■ VISITORS ARE LOOKING FOR EXCLUSIVITY

Visitors are seeking their own personalised experience to 'get behind the scenes' by meeting the local producers, brewers or greeting the chef.

## ■ PAIRING FOOD WITH OTHER INTERESTS

Visitors are looking for active experiences within destinations providing tourists with the opportunity to combine their active pursuit interests with new ways of the telling the food story e.g. cycle or walking tours with food experience elements with local producers or local restaurants.

## ■ MULTIGENERATIONAL TRIPS BUILT AROUND EATING TOGETHER

This is a growing trend towards many generations travelling together e.g. extended family groups. In food tourism, this expands the target group where the needs different ages of visitors need to be taken into account.

## ■ SHARING EXPERIENCES AND TECHNOLOGY ENHANCED FOOD EXPERIENCES

Visitors are increasingly influenced in their choice of destination by the level of 'shareable experiences' and imagery of food experiences posted across social media. Food destinations are increasing their visibility through food content across social media, particularly Instagram.

## ■ SUSTAINABILITY IS KEY

Visitors are looking for ways through food tourism to contribute to their personal sustainable goals and eat at places demonstrating social responsibility. They look for places to eat that cook with locally sourced, seasonal ingredients and who proactively communicate and demonstrate their socially responsible methods.

## ■ HANDS-ON MEALS AND MAKING THE LOCAL CONNECTIONS

Visitors want the local food story and experience delivered by the local person introducing ingredients and regional techniques to the visitor. They want to eat intelligently through experiences such as time spent with chefs in the kitchen, around the dining table, with producers and growers on the farm, in the orchards or at the markets.

## ■ PROVIDE WAYS TO BUY LOCAL PRODUCE

Visitors want to bring home mementoes of their trip. New opportunities are fast emerging to create new revenue streams through recurring purchases e.g. exclusive VIP food clubs, monthly cheese club, VIP whiskey sampling clubs.

## ■ FOOD IS AN INFLUENCER

Visitors, particularly younger generations, are placing more emphasis on food as an influencing factor to selecting holiday destinations and short break locations.



## ■ SUPER FOODIES - MILLENNIALS AND GEN Z

Millennials interest in food continues to grow but Generation Z (born after 1996) are becoming known as the 'Super Foodies' displaying increased levels of knowledge and interest in food and drink.

## ■ VISITOR ADVOCACY

Visitors interested in food tourism are influenced more by online recommendations and visitor generated content than any other leisure tourism categories.

## ■ ADOPTION OF DIGITAL TECHNOLOGY

The global pandemic has accelerated the rate at which digital technology is embedded into everyday life. Across the food tourism sector this includes online reservation systems; marketing, digital and QR coded menus. It has created an expansion of business diversification through online ordering and home delivery services.

## ■ LOCALHOOD

Consumers have shown a desire to buy and consume more locally derived produce (local is becoming very local) from within a smaller geography. In numerous cases this has been supported by the developed of online markets where consumers can order products and food boxes from small and artisan producers before collecting at an allocated day and time.

## ■ CATERING TO THE SELF-CATERING

The popularity of self-catering holidays has led to new opportunities for restaurants to market food service to tourists. Services range from dine at home kits, prepare at home to exclusive experiences of chefs preparing and cooking a meal at the visitor's accommodation.

## ■ GLOBAL CULINARY CULTURE AWARENESS IS GROWING

The global pandemic has increased people's awareness and interest in culinary culture. This has been accelerated by restaurants and chefs using their online channels to showcase food and cooking techniques and global broadcast networks producing increased volumes of food culture programming.

## ■ SPECIAL DIETS

There is an increased focus on combining local food products and experiences with global dietary trends and food preferences.

## ■ PROTECTING AND SUSTAINING LOCAL FOOD CULTURES

Visitors want the destination backstory told through the history of the recipe, local food customs to the story of the local produce. Serving up a local and authentic meal is helping to protect and sustain local food culture.

## ■ PEOPLE ARE SPENDING MORE ON FOOD AND BEVERAGE REGARDLESS OF INCOME

An increasing range of food and drink product categories are 'passion' products and people are continuing to spend more money on quality food experiences.

## ■ FOOD/CULINARY TRAVELLERS ENJOY ACTIVE TOURISM AND SPEND MORE.

Visitors who show a higher level of interest in food have a tendency to take part in more destination experiences and spend more than other leisure tourism categories.



# 3. Key Learnings

## Destinations



Each international case study introduces new learnings on how destinations approach food tourism and their future plans for recovery and resilience. The following represent the common themes to emerge from the analysis.



## BUILDING UP THE TRUST OF VISITORS – GUARANTEEING SAFE HOLIDAYS

Individual businesses have not only embraced new safety standards, but have exceeded minimum standards to ensure their safety message and proposition is even stronger for reassuring visitors.



## PIVOT ON LOCAL TASTE AND STYLES

Destinations are capitalising on particular tastes and foods associated with the destination to establish a unique food identity for the area, adopted and embraced across all food outlets in the region as a point of difference and platform for food innovation e.g. Cider in the Basque Country.



## BUILD A STRONG NETWORK OF FOOD TOURISM BUSINESSES COMMITTED TO THE IDENTITY OF THE DESTINATION

There is an increased focus placed on the development of food tourism business networks committed to developing synergies among complementary companies to develop new blended destination experiences e.g. integrating accommodation, food, drink with destination activities.



## OUTDOOR SPACE INNOVATION

Outdoor dining is essential to future survival and likely to become a legacy impact from the global pandemic. The development of outdoor spaces is enabling businesses consider a more seasonal approach to maximising the space available and new opportunities to incorporate areas of public realm as part of the food experience.



## DIGITAL INNOVATION

The common understanding is businesses (and shoppers) have achieved five to seven years of digital innovation in 2020. Utilising new online platforms to support all elements of the business will be key. This extends from marketing to the local and national markets to streamlining business efficiencies through greater use of technology.



## COLLABORATION, NEW BUSINESS MODELS & NEW REVENUE STREAMS

There are increased levels of business partnering across a variety of food and drink categories creating unique new food tourism products, experiences and business models generating new revenue streams. These are also doing something positive for local communities, producers and food service venues. It is essential to look at every opportunity to collaborate with other businesses, inside and outside of hospitality.



## FOSTERING LOVE FOR LOCAL

The demand for 'local' food is growing across the globe. Increasingly, consumers are keen to support smaller businesses and invest in their communities supporting local producers, restaurants, shops, and bars.



## DEVELOP NEW INCOME STREAM OPPORTUNITIES

Food tourism businesses have quickly come to terms with the reality that the old business model is challenged with a need to develop new income streams. Businesses have realised the need to explore new opportunities for innovation to contribute to income streams.



## SUSTAINABLE FOOD TOURISM

A new operational environment requires destinations to focus on recovery (re-establishing business levels), working towards long term resilience and strengthening the collective approach to sustainability. Food will play a key role in this and should be embraced as a platform for destination innovation and wider industry engagement.



## SECTION TWO



# International Case Study Summaries





**A: Food is central to the collective destination recovery story**

CASE ONE:  
**BASQUE COUNTRY**



## LOCATION SUMMARY

The Basque Country is located in Northern Spain. It covers an area of 7,234 km<sup>2</sup> with a population in excess of two million people. The region is divided into three provinces of Bizkaia, Gipuzkoa and Alva includes cities such as San Sebastian, Bilbao and Vitoria-Gasteiz



## DESCRIPTION

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



## AREAS OF FOCUS

Through its Food Tourism Strategic Plan, (published in 2010 and revised in 2016), the Basque Country embarked on a journey to position itself as 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. More pointedly, the essence of its strategic approach was to link every product and experience to the destination and the famed Basque culture and character.

A decade on and the entire sector has blossomed through a variety of different strands. These include a 740 strong public driven Product Club (Eustadi Gastronomika) that collectively supports and promotes its members and the Basque Culinary Center, a pioneering academic institution designed to educate, research, innovate and promote gastronomy and food and can boast the involvement of 11 of the most influential chefs in the world.

In addition, an international Gastronomic Forum, Basque Culinary World Prize and Basque Academy of Gastronomy Awards added to its international status as a centre of food innovation and celebration.

With an emphasis on quality, identity, food collaboration, networking and value-added experiences, Food and Wine Tourism is now one of the main reasons for visitors to travel to the Basque Country.

Inevitably, due to the COVID-19 pandemic, the tourism and hospitality industry have suffered greatly due to the lack of international tourism. However, through government subsidies, vouchers to stimulate domestic tourism, a 'responsible tourism seal' and their renowned innovation to adapt goods and services in light of these unprecedented times, the Basque Country has embraced food and food tourism as a key element for recovery.





## SUMMARY LEARNINGS

- From the farm to the table, the Basque Country extensively researched all stages of the food chain in order to develop, combine and enhance associated tourism products, experiences and activities that would establish it as a leading gastronomy destination. The focus never wavered from its strong cultural and culinary identity highlighted by the number of Michelin star chefs that continue to fuse tradition with innovation.
- The Basque Government also enlisted the private sector to help finance its business model, namely the Product Club collective 'Eustadi Gastronomika'.
- Pivot on local taste and styles and capitalise on any particular taste or style the destination has in terms of discerning palates, a key part of a destination's identity.
- Connect products, experiences and producers involved in 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 the food history of the destination.
- Develop a product club or food tourism cluster involving the public and private sector. Develop an integrated Public and Private sector business model that is not dependent on the public side only.
- Build a strong network of companies committed to the identity of the destination through food and tourism. This network of companies commits to exploring synergies among complementary companies, accommodation, drink activities.
- Do not take digitalisation for granted and invest in digital skills at all levels across the food tourism economy.



**To read more on this case study please click here -  
Full Basque Country Case Study**



# **B: Food and Sustainable Destination Development**

CASE TWO:  
**SLOVENIA**



## LOCATION SUMMARY

Slovenia is one of the youngest European countries, having become an independent state in 1991 after the collapse of the Yugoslav federation. In 2004 Slovenia became a full member of the European Union. It has a varied landscape stretching from the Adriatic Sea to the Alps.



## DESCRIPTION

Slovenian tourism has gone through a remarkable metamorphosis in recent years focused on the transformation of Slovenia into one of the leading green countries in the world. The game changer year was 2017, which coincided with Slovenia being declared the world's most sustainable country by National Geographic. In October 2018, Slovenia was awarded the title of European Region of Gastronomy. Today food tourism is one of the main destination communications themes and plays a key role in tourism recovery.



## AREAS OF FOCUS

In 2006 the first Slovenian Gastronomy Product Strategy in Slovenia was prepared. The strategy was at that time not so much a development or marketing strategy but more of a prescriptive document explaining all aspects of gastronomy as a product. However, it represented the first important milestone in developing food tourism in Slovenia.

At the turn of the 21st century, Slovenia's cuisine and gastronomy were relatively unknown to the world. The degree to which it was included in tourism and destination promotion was modest. At this stage a new gastronomic pyramid was established and served as the foundation for gastronomic tourism development. This took the form of detailing the most typical authentic regional and national dishes in addition to incorporating a focus on the national food heritage. The new pyramid established 24 gastronomic regions.

In October 2018, Slovenia was given the title of European Region of Gastronomy (ERG) 2021, by the International Institute of Gastronomy, Culture, Arts and Tourism (IGCAT), affirming its commitment to the development, intersectoral cooperation and promotion of Slovenia's gastronomy. It was a recognition of the efforts of local producers, chefs and tourist industry figures in working to make the country a top gastronomic destination for boutique, five-star experiences focused on sustainability.

Slovenia identified a lack of a greater national culinary identity and self-consciousness as a major competitive challenge. It recognised how neighbours achieved market stand out such as Istria, Croatia who focused on wine and individual products such as truffles. Austria embraced good practice of linking nature and small-scale producers to an integrated gastronomic identity and the image of the country. Hungary was viewed as an example of a small country with a relatively difficult cuisine however managed to become one of the leading countries in that part of Europe gaining an increasing number of Michelin stars.





## SUMMARY LEARNINGS

- The vision of Slovenia is to become a visible food tourism destination with high-quality, innovative, recognizable gastronomy and an authentic culinary range of foods and wines. These will be delivered by a number of boutique providers of high-quality food who build their product range on local production of foods and creative dishes reflecting the natural resources, knowledge and heartiness in preparation.
- New levels of collaboration were key in the response to the global pandemic. New cross sector partnerships created unique new gastronomic products and business models. It is a new revenue stream, but above all it focused on working together and doing something positive for local communities, local producers and top restaurants inspiring people at home.
- The demand for quality has increased. The results of the summer season demonstrated how top quality boutique accommodation providers with high-quality cuisine were the most sought after experiences. This year confirmed the value of quality over volume.
- The demand for 'local' food is growing all across the globe, but it needs to be fostered, promoted and developed on all levels. Increasing numbers of consumers are forgoing larger stores for smaller businesses in their communities and this 'love local' movement has resulted in an increasing number of people looking to invest in their communities, supporting the restaurants, shops, and bars that bring color to their neighborhoods and strengthen their local economy.
- The responsible travel standards of Slovenian tourism communicated under its GREEN & SAFE label represents an upgrade of sustainable practices with a new responsibility towards local communities and tourists. It will be common approach to safe destination reputation management and communicating the competitive advantages of Slovenia as a tourist destination of the future.



**To read more on this case study please click here -  
Full Slovenia Case Study**



## **C: Maximising Outdoor Space and a Food Tourism Gateway**

CASE THREE:  
**MELBOURNE, AUSTRALIA**



## LOCATION SUMMARY

Melbourne is Victoria's capital city and the business, administrative, cultural and recreational hub of the state. The City of Melbourne municipality covers 37.7 km<sup>2</sup> and a residential population of almost 180,000. The entire Greater Melbourne area covers 9992.5 km<sup>2</sup> with a population of around 4.96 million.



## DESCRIPTION

Melbourne has long been considered the premium destination for food and wine in Australia and there are a number of reasons for this. The city has a long established restaurant scene with a multitude of dining options at all price points. There are over 2,300 licensed venues in the city centre alone. It is this density of cafes, restaurants and bars that make Melbourne the culinary capital of the country.

There is a buzzing cafe scene (courtesy of Italian migrants in the 1950's) while the city laneways are home to hidden cocktail bars from the tiny 12 seaters to luxurious multi-level venues. Melbourne also is home to a large fresh produce market in the heart of the city.

The hospitality scene has flourished because Melbournians support their restaurants. They love to talk about food as much as they talk about the weather. But it has been the visitor economy which has delivered the vast number of people (customers) into Melbourne.

All of this has developed over three decades and been well supported by multiple levels of government. The Victorian State Government provides significant financial support to promote food and hospitality industries through Visit Victoria. This is backed up with investment by the Melbourne City Council.

Melbourne and Victoria are promoted as the major food, wine and event destinations of Australia. In the 2019/20 year, the visitor economy in Victoria generated over \$32 billion. The overarching tourism strategy for Victoria is operated by Visit Victoria which is funded by the Victorian State Government.



## AREAS OF FOCUS

The Victoria Food Tourism Strategy run by Visit Victoria is significant and divides the state into regions with their own character, attractions and stories. Included are the regional highlights of Gippsland, High Country, The Mornington Peninsula, The Yarra Valley and The Bellarine Peninsula.

### GIPPSLAND

Gippsland is a region in south-eastern Australia which extends from Melbourne's eastern suburbs to the New South Wales border, and encompasses beaches, farmland, mountains and lakes. Stretch your legs in some of Victoria's most spectacular national parks, be charmed by tiny towns, and indulge in gourmet fresh produce in Gippsland. Feed your curiosity at galleries and studios, or at local cellar doors, boutique distilleries and renowned restaurants.

## HIGH COUNTRY

The High Country is located in the north-east of Victoria. It is an area that features national parks, Victoria's highest mountains, lakes, snow resorts, vineyards and a rich history including gold discovery, cattlemen and bushrangers. Hit the slopes at Alpine resorts in winter and return in the warmer months for inspired bushwalking and cycling action, from dizzying mountain bike challenges to meandering rail trails. Visit renowned restaurants and wineries, discover the vibrant craft brewery scene, or fill your basket at provedores and farm gates, all brimming with local delights.

## THE MORNINGTON PENINSULA

Located south-east of Melbourne, The Mornington Peninsula is a premier holiday destination, attracting millions of visitors annually. A beachy place where the real drawcards may be the hot springs, wineries, local produce or markets, just an hour from Melbourne.

## THE YARRA VALLEY

Less than a one-hour drive from Melbourne, the Yarra Valley is home to vineyards, fine dining and quaint accommodation, making it one of Melbourne's favourite weekend breaks. This is Victoria's oldest wine region, dating back to 1838, and has garnered a global reputation for its chardonnay and pinot noir. The Yarra Valley is celebrated for its fresh produce, including freshwater salmon, trout and caviar, as well as handmade cheeses and preserves and fine gourmet dining. The Yarra Valley is also known for its local breweries and artisan cider producers

## THE BELLARINE PENINSULA

The Bellarine Peninsula is located south-west of Melbourne in Victoria, Australia, surrounded by Port Phillip, Corio Bay and Bass Strait. Explore the burgeoning foodie scene, complete with craft breweries, local wineries, farm gates and provedores. Surf, paddle and swim at bay and ocean beaches, and get close to local wildlife in Port Phillip Bay.



## SUMMARY LEARNINGS

- Maximising the outdoor space - Melbourne City Outdoor Dining Plan has been a wonderful opportunity for Melbourne restaurants to expand tables out of their venues and into the transformed streets. This is a significant program for Melbourne restaurants who are looking to reopen and be able to do so economically by having as much seating as possible. It creates an outdoor setting where customers and staff can dine and work safely. COVID-19 has made a huge impact on so many areas of business, including the restaurants and cocktail bars of central Melbourne. A strategy has been devised which will see inner city laneways handed over to outdoor dining. The strategy for Melbourne will see a mix of footpath dining and repurposing street car parking through to complete takeovers of city laneways and dining in parks
- Creating distinctive destination food clusters - A key attraction for Melbourne is the distinct neighbourhoods clustered around the city centre, each with their own character or cuisine – Richmond for Vietnamese, Carlton's 'Little Italy', Fitzroy for Spanish and Brunswick for Lebanese. Without a doubt clusters create choice and

options for visitors. All visitors to a destination have to eat, not just the foodies. Central Melbourne and its neighbourhoods offer so much diversity too. Stepping from Carlton to Fitzroy brings with it a real change of pace and character too. One is clean, neat and tinged with Italian style. The other grungy with heaps of street art, an industrial vibe and vintage clothing stores.

- Speed - This has proven essential to hospitality survival to get through lockdown and intense business interruptions from COVID-19. There is no doubt that businesses who jumped quickly to online delivery models received the most publicity (helping them to spread the word) and were welcomed by customers looking for new ways to have great food at home.
- New income streams - By quickly coming to terms with the reality that the old business is gone and business began to set up new income streams. Selling produce packs direct from farmers and growers, chef led cooking classes.
- Digital innovation - The common understanding is businesses (and shoppers) have achieved five to seven years of digital innovation in 2020. Utilising new online sales platforms for home delivery of meals and drinks, ready to heat restaurant quality meals delivered effortlessly.
- Collaboration – It is essential to look at every opportunity to collaborate with other businesses, inside and outside of hospitality. Melbourne has many city restaurants joining forces with country wineries and venues to create new income streams. Partnering to create unique at-home dining opportunities
- Touchless Economy - It is imperative that safety systems are understood and in place for with a view to making the customer experience as 'touchless' as possible. This includes bringing together the latest tech for Dine-In, Pick-Up, Delivery and Click-And-Collect in addition to the introduction of QR Codes for payments and contactless menus.



**To read more on this case study please click here -  
Full Melbourne Case Study**





# D: Food Cluster Entrepreneurship for Recovery

CASE FOUR:  
**SOMERSET AND NORTH DEVON**





## LOCATION SUMMARY

The area covered by the overview is the 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. The bulk of the case study covers the South Somerset District.



## DESCRIPTION

The key focus for the area is on raising the level of awareness of the county as an 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.

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

The food narrative is dominated by 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, farm shops and delis brimming with regional sumptuous fare... including world famous brands all started here in Somerset such as Mulberry and Thatcher’s Cider.”



## AREAS OF FOCUS

In South Somerset the link between tourism and food and drink is developed as a priority policy area through the District Council's 10 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.

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. Recent plans have been announced for a new rural life visitor attraction to celebrate local food and drink at The Haselbury Mill and Great Tithe Barn.



## SUMMARY LEARNINGS

- Entrepreneurship for recovery – Much of the most innovative responses to recovery have been exhibited by tourism entrepreneurs who have consistently embraced innovation. 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 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-19, 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.
- Among the key successes for the cluster included the 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 destination reputation. It supported the consolidation of existing local food supply chains, developing new suppliers and promoted increased diversification of their own products and experiences.
- In the context of South Somerset the emergence of new investment by existing and new private sector enterprises in product development with food and drink as key elements of their larger product offering, combined with a raft of new food and drink producers (and products) has raised the bar. It has elevated 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 increased the levels 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. Further initiatives include using local food and drink by Michael Eavis at The Glastonbury Festival and leading heritage attractions (such as Forde Abbey and Wells Cathedral).
- The use of food to create Value for Money packages and to promote domestic tourism, has again been undertaken at the business level promoted by destination marketing groups focused on "Taste local, buy local, eat local and visit local". This has resulted in a number of UK national newspapers picking up stories and featuring individual businesses or running theme articles in print or on-line.



**To read more on this case study please click here -  
Full Somerset and North Devon Country Case Study**





## **E: Local Food and Place Authenticity**

CASE FIVE:  
**LISBON, PORTUGAL**



## LOCATION SUMMARY

Lisbon is the capital of Portugal with a population of in excess of 0.5 million residents. The wider Lisbon Metropolitan region is spread over 3,015 km<sup>2</sup> and home to 2.8m inhabitants accounting for 27% of the Portuguese population.



## DESCRIPTION

There are now over 3,650 accredited restaurants in Lisbon including 7 Michelin-star establishments and 24 wine service companies.

The pre-COVID-19 market focus is the development of city breaks targeting 35- 54 year age groups and higher earners with a proposition of 'Authentic Lisbon' and a core focus on restaurants and nightlife.

The destination brand focuses on 'authentic food and drink often with a contemporary twist in authentic, historic, neighbourhoods and traditional settings' with a close relationship between the local residents and the restaurants and bars'

The strength of this positioning is illustrated in the way that the hospitality sector has responded to the COVID-19 situation within their neighbourhoods.

One of the most obvious and striking aspects of tourism in Lisbon is the volume of food tours and itineraries in the city. This involves multiple local companies that offer combinations of food and drink experiences that are often themed or highly geographically focused within a neighbourhood. They range on their duration, type of food and drink explored and in price. They are always a collaboration between the tour operator and local restaurants.



## AREAS OF FOCUS

The 'integrated approach' to destination development had a system of interrelated activities supporting this 'authentic Lisbon restaurant' offer. Thus, food and wine suppliers from the rural area work closely with the processing and logistics parts of the food industry and hospitality schools and culinary training institutions and The National Restaurants and Catering Association to ensure a flow of local produce to well-trained chefs and the hospitality industry as a whole.

The discovery of the city and its neighbourhoods uses food and drink as the driver for exploration at anytime of day or night incorporating markets, restaurants of all types, street food and hotels and other forms of accommodation. Innovation is stimulated by linking the hospitality sector with the creative industries ensuring interesting interior design of the venues and creative approaches to the food design and pairing with drink.

In terms of significant investment pre-COVID-19 in the development of food tourism experiences, the LTA works closely with ADDICT, the creative industries agency for Portugal, to support start-up businesses by providing a range of advisory and financial services and combining traditional business support with a creative twist. There is a regular 'Tourism Start-Up Day' which resulted in a €5m investment in tourism and food start-ups in 2019.





## SUMMARY LEARNINGS

- Much of the innovation that has happened in tourism in Lisbon has been driven by individual entrepreneurs and that this has been intensified during the COVID-19 period. In addition, there is a well-functioning system of linking creative talent and skills with innovation, start-up funding, that helps connect and support collaboration across sectors in the city.
- The following were viewed as best practice locally in the response to the pandemic and building for recovery.
- The allocation of traditional street food kiosks to well known chefs to (a) keep the tradition of the kiosks alive during the pandemic and (b) to give the chefs and their brands a more prominent and popular position in the city's neighbourhoods thus developing local business and enhancing brand reputation. A good example is in the traditional Quiosquede dating from 1872 in Sao Paulo neighbourhood where prominent chef Andre Magalhaes from Taberna da Rua das Floers in Casa de Sadre has taken over the kiosk and is leading a revival of the petisco tradition (the street snack)
- The re-purposing of existing restaurants and other public spaces. This is exemplified at Chapito a circus skills training school in the historic neighbourhood below the Castle where two of the canteens in the school has now been taken over and re-imagined by a local restaurant using the large circus tent as additional space to serve traditional dishes to local residents
- The development of the neighbourhood markets as places of consumption and not simply the purchase of local food and drink. In part this is a reaction to the development by Time Out of two of the city's markets into highly touristic experiences. As a result, for example, Maria do Rosario Onofre is project managing the Mercado Campo de Ourique to meet the needs of a local market that will continue after COVID-19 to drive tourists into authentic Lisbon food markets.



**To read more on this case study please click here -  
Full Lisbon Case Study**



# **F: Focus on Quality and Uniqueness of Local Food**

CASE SIX:  
**ISTRIA, CROATIA**





## LOCATION SUMMARY

Istria is a 3,600 sq. km heart shaped peninsula in the north of Croatia. It has a population of 15,000 with a wider provincial population of 208,000. The coast has traditionally been the focus of tourism activity with historic towns such as Vrsar, Pula, Porec and Rovinj.



## DESCRIPTION

Croatia is a small country with beautiful nature, interesting traditions and history, rich cultural heritage and diverse gastronomy. With its 1,200 islands, islets and bays, Croatia is one of the most indented coasts in Europe. The Istrian peninsula is located at the head of the Adriatic between the Gulf of Trieste and the Kvarner.



## AREAS OF FOCUS

Today Istria is the most important holiday destination in Croatia. The heart of this success lies in its multicultural approach and a unique model for destination development founded on deep rooted stakeholder involvement with exceptional levels of innovation and collaboration based upon synergies across all sectors. It includes an intense focus on the quality of local products and services in order to deliver guests with a unique and unforgettable Istrian experience. From the outset, the tourism focus identified a value over volume approach. Every product created in Istria is imagined in terms of what it would look like from a quality perspective when benchmarked against its competitors.

This is particularly evident in the comprehensive story of positioning the local gastronomy product and experiences. It would be impossible to deliver a credible quality tourism gourmet experience unless there was an investment in creating unprecedented levels of quality in the production of local products and contemporary design in their presentation, promotion and marketing. As a result, tourism development partners provided a programme of support for those producing the local wines, olive oils, vegetables and those harvesting the forest for truffles (white and black).

Today, the Istrian gourmet product includes internationally award winning wines, extra virgin olive oil tourism, prosciutto tourism, agro tourism and truffle tourism together with a programme of year round activities and events packaged together with appropriate accommodation (farmhouses and village hotels). After the period of Civil War in Croatia (1991-1995), the region was offered the opportunity to re-think and re-position itself to attract visitors back to the region. The goals were focused on 1) Prolong the tourism season, 2) Make Istria visible on the world tourism map, 3) Develop food tourism and gastronomy and 4) Develop a healthy synergy and new levels of collaboration among all stakeholders particularly the accommodation sector and the agricultural sector driven by sustainable tourism philosophy.

One of the main goals was to make the region recognised for the production of quality products that would place the area on the global map for food destinations. The focus was orientated around the development ethos of quality over quantity.



## SUMMARY LEARNINGS

- Istria provides a number of examples of really strong food clusters. However, since the development of the food tourism focus, the wider destination (Istria) has become a foodie destination in its own right and is no longer sub-divided into clusters. Some areas have specific products that are not available across the entire region and have developed their own identity based on particular products e.g. truffles in the area known as Central Istria. The North West is renowned for flat fish and the Southern area is recognised for crab and blue fish. The Western area is renowned for its fresh oyster farming.
- The focus on quality from the outset of the food tourism strategy is one of the main reasons associated with Istria being able to extend its visitor season. The food tourism sector has been identified as a key reason why visitors travel to the destination during off season. This is accelerated through heightened levels of collaboration between tour operators, local marketing agencies and accommodation providers throughout the year.
- There is very strong evidence of collaboration between all stakeholders across the region. Hotels and accommodation providers have increased the use of local products in their restaurants in order to support local providers.
- Increased levels of experience packaging have resulted in large volumes of business in the shoulder seasons. The white truffle season in Istria begins in October and ends in January and has been the focal point for a large volume of overseas visitors and domestic tourists. The focus by accommodation providers on the destination activity rather than their own packages have been key to this success.
- There has been a significant shift in the mentality of Istrian restaurants that have begun to understand visitor preferences towards more seasonal local dishes and local products. Local produce is now found on every table and increasing numbers of specialist food shops have adjusted to selling the quality products that are now defining the Istrian food tourism experience.
- The regional Government decided to only promote the best restaurants that complied with five very simple criteria of creating the appropriate ambience aligned with the regional theme, service quality, incorporation of local wines and local products and the length of time during which the restaurants were open throughout the year. The focus on quality and the desire to become an international food destination has resulted in restaurants that previously only worked during the Summer season to becoming restaurants that work for the entire year. The results of the five criteria projects has resulted in outstanding innovative cuisine through local products that have branded the destination as the best food destination in Croatia and the best hidden gourmet treasure in Europe.

- Istria has maximised the uniqueness of specific varieties of its food. Istria is one of only two countries in the world that has white truffles. It has become a key element of promoting the destination in addition to the production of olive oil. More than 70 producers of olive oil are now among the top olive oil producers resulting in Istria becoming the number one region for the best quality extra virgin olive oil in the World for six consecutive years. Local products from local producers are now central to the development of the food tourism positioning of Istria. Many restaurants incorporate a special corner which promotes local dishes made from local ingredients while there is an increased emphasis on developing special events based around Istrian gastronomy to promote local products and generate demand for accommodation.
- The region of Istria has focused on a year round model using seasonal products to develop special events and gourmet festivals that combine food, local tradition and culture and entertainment. These include Truffle Days, Days of Olive Oil, Vinistria, an educational event combining seminars, fairs and cookery classes based around the main grape of Istria and other local products. Other specific promotional activity includes Days of Cheese, Days of Prosciutto and Wild Asparagus Days. These events are estimated to attract in excess of 10,000 visitors per day with extensive media reach for the destination.



**To read more on this case study please click here -  
Full Istria Case Study**





## **G: Collaborative Approach**

CASE SEVEN:  
**COPENHAGEN, DENMARK**



## LOCATION SUMMARY

Copenhagen is the capital of Denmark and home to 603,000 residents.



## DESCRIPTION

The city is a modern metropolis hosting a broad variety of world class restaurants, hotels and internationally oriented attractions. The rest of Denmark is focused on the outdoors, cold water tourism and rented second homes (summer houses) which constitutes most of the overnight capacity.

The city is viewed as the birthplace of New Nordic cuisine and Copenhagen is viewed as one the world's true gastronomic hot-spots and creative playgrounds, ranging from NOMA to local rooftop earth-to-table flavours.

It was Copenhagen's desire to re-invent tourism which captured the world's imagination. It was provoked to re-think tourism in the city as a result of much publicised concerns about over tourism and its impact on the quality of life of its residents in addition to the experience for visitors in other large urban centres. As a result, Wonderful Copenhagen published a bold, new plan for 2020 titled "The end of Tourism as we know it", promoting the idea of localhood.

Wonderful Copenhagen places people at the centre of its vision and imagines that the destination's future will be co-created by residents, industry and visitors. By declaring localhood for everyone, Wonderful Copenhagen encourages its destination to think of its visitors as temporary residents instead of tourists. A radical shift moved the focus from marketing and promoting to others to a new type of promotion around the shared sense of localhood. The approach is designed to invite visitors to explore the destination and neighbourhoods.



## AREAS OF FOCUS

For the last twenty years, there has been a great difference between the two main geographies of the Danish tourism industry i.e the city itself and the coastal areas. Copenhagen has been the centre of growth and internationalization whereas the rest of the country has been dependent on near markets resulting in a less developed tourism product base. The exception is the Danish west coast, which has enjoyed great success in contributing to attract tourists outside the high season.

Since 1994, Wonderful Copenhagen has been the destination management organisation for Copenhagen and surroundings. Wonderful Copenhagen had moved on to a next-level tourism, focusing on management, sustainability and liveability, rather than marketing. It is a networking organisation, which has had great success in creating a strong modern brand, attracting cruise ships and congresses and being the driver in developing strong brands for the city.

Copenhagen presented the strategy “Localhood for everyone” in 2017. Under the vision of localhood, residents and travellers co-create the tourism destination and shape its development to make Copenhagen a better place to live for all. By declaring “localhood for everyone”, Wonderful Copenhagen encouraged the destination to think of the visitors as temporary residents, instead of as tourists.

Residents are part of the community, and they contribute to it. The tourism industry can also help visitors add value to the community, instead of asking permanent residents to exchange their quality of life for money.

In 2004 a group of Scandinavian chefs introduced the manifesto “New Nordic Cuisine”, which focuses on re-inventing the traditional Nordic kitchen and using local produce. In some form, the manifesto has been incorporated in most tourism strategies in the later years, meaning that local food, Scandinavian tradition and innovation has been at the core of the food and restaurant scene. Danish chefs have developed a strong brand, including NOMA, and strong ties have been established between local producers and Copenhagen restaurants.

Prior to the COVID-19 pandemic, public/private investment in the development of the food tourism experience is best exemplified through the Copenhagen Cooking & Food Festival launched by Wonderful Copenhagen. Since 2017, it has been driven by FOOD (Food Organisation of Denmark) and is a partnership between municipalities, companies and organisations around Copenhagen.

FOOD also has the lead on a project called “The creative and competent food scene” - referred to as “The Future Food Scene”. The project is a strategic collaboration created to support and strengthen the food development in Greater Copenhagen. The Future Food Scene is a project targeting ambitious and talented companies working with food. The purpose is to help the best food companies to develop their business and create more growth. The project has a variety of activities targeting small and medium-sized businesses - from the manufacture of chocolate or soft drinks to hotels, restaurants and street food actors.





## SUMMARY LEARNINGS

- Being well consolidated, Wonderful Copenhagen is a natural lead in the tourism recovery of the city. In August, the organisation launched a massive development project called Restore Restaurants focusing on innovation, sharing knowledge and accelerating business, post COVID-19. The project is strongly supported by Business chambers, government, restaurants and municipality. First steps in the project are being taken this autumn and this is the first joint venture to support the food and hospitality industry across the city.
- Under the hashtag “Brug byen – den har brug for dig” (use your city – it needs you) Wonderful Copenhagen launched a campaign targeting the inhabitants of Copenhagen, urging them to support local restaurants.
- The municipality of Copenhagen opened up for the use of public space allowing restaurants to use outdoor space like pavements and open spaces for free. The restaurant Meyers erected a greenhouse along the harbour front.
- Wonderful Copenhagen has seen a great willingness to support “the place on the corner”. Copenhageners generally has been very keen on preserving their own neighbourhood and supporting the special places, that create quality of life. The same way, local food has become increasingly popular among consumers and inclusion in restaurant menus.



**To read more on this case study please click here -  
Full Copenhagen Case Study**

## SECTION THREE



# Conclusions





Every international tourism destination is facing its own challenges in dealing with the consequences of the global pandemic. As tourism re-opens for domestic visitors and prepares to welcome back international visitors, a range of common factors are consistent among each destination case study and their application of best practice. Destinations will have an acute focus on the domestic market in re-opening for business with multi-generational travel becoming an increasing trend. The need to consistently reassure our visitors around destination safety will become standard practice.

The international evidence is food remains central to destination messaging and the enhancement of the visitor experience. Supporting local has become extremely important for consumers and increasing awareness of food in ongoing approaches to sustainability. There is increased awareness of the value of local food and the role of artisan producers with visitors now seeking to meet the people beyond the food and taste the destination through localised menus.

Incorporating food and drink, food experiences and food occasions has become an increased focus for destination marketing to drive demand for day and overnight visits. Food, local stories and food personalities have now become mainstream in destination profiling. Quality and exceptional food experiences remains the consistent visitor expectation and central to developing new levels of visitor advocacy, telling their destination experience story on their social channels. Food and drink presents multiple opportunities for destination innovation from marketing, experience development, packaging and industry collaboration.

## KEY AREAS FOR FUTURE FOCUS

The following represent the summary learnings from the international destination case studies. Each destination is recognised for a variety of best in class approaches from promoting local food entrepreneurship to integrating the outdoor dining and examining new ways of working together.



### SAFETY AND REASSURANCE

Safe destinations and safe food tourism outlets must be central to the destination message and business operational approach.



### DOMESTIC FIRST, RETURNING MARKETS

Stimulate local demand and prepare for the return of the domestic market with an eye to future returning international markets.



### CREATE DESTINATION FOOD OCCASIONS

Drive visitor demand through the creation of destination 'special occasions' embraced by the industry and attract visitors in off peak periods e.g. mini foodie weekends delivered collaboratively by hotels, restaurants, local food producers.



### CLUSTERS AND COLLABORATION

New collaborative approaches between food and non-food experiences provide a multitude of opportunities for new experience development, added value, cross selling and joint marketing.





### MAXIMISE THE DAY, INNOVATE IN THE EVENING

Consider the opportunities across different stages of the day (morning, afternoon and evening) to develop new food experiences with significant scope for evening time innovation.



### EXCEPTIONAL FOOD

Destinations need to elevate a quality food story as part of their strategy to attract visitors back.



### LOCAL FOOD PERSONALITY, LOCAL EXPERIENCES

Elevate the local food heroes and show the personality of the destination across the destination farm to fork journey.



### BOUTIQUE FOOD EXPERIENCES

Visitors are searching out unique non mass-produced experiences and willing to pay for premium food and more personalised experiences.



### FOOD TOURISM AND VISITOR TRENDS

Important new food segments (e.g. Millennials, Gen Z) are emerging with food more central to holiday decision making while multigenerational travel is on the rise. Marketing must be segment appropriate.



### ADDED VALUE INDUSTRY

The focus is on adding value to the visitor experience while maintaining pricing levels.



### SUSTAINABILITY

Food will be central to the sustainability focus of destinations and offers many platforms for innovation.



### FOUR SEASONS MODEL

Innovate through the use of available outdoor spaces and the development of new seasonal food experiences. Blend seasonal menus and outdoor spaces aligned to a four seasons food and place messaging.



### DEMAND GENERATION

Marketing will be digitally focused, providing significant opportunities to showcase the destination food experience.



### CONTENT IS KEY

Sustained marketing engagement at destination level communicating the quality of the food experience is important to ensure a consistent approach delivering interesting content on a regular basis.



### VISITOR ADVOCACY

Visitors will experience the food and place and buy the produce. It is important to ensure visitors go 'social' and recommend the destination experience.



# Fáilte Ireland

National Tourism Development Authority

