National Food Tourism Implementation Framework 2011 - 2013

Fáilte Ireland
National Tourism Development Authority

CONTENTS

Food tourism is a growing market segment internationally and many tourist destinations are developing this important sector as a means of gaining competitive advantage.

Ireland already has much to offer the visitor in terms of our food offering and the potential to build on success to date is significant. However, maximising our attractiveness as a food tourism destination requires a clear plan and improved cooperation between the various stakeholders as analysis has indicated that the fragmented nature of the industry and the diversity of stakeholders involved have led to an absence of strategic focus and a lack of coordination of activities.

The National Food Tourism Implementation Framework was developed through a working group which is representative of industry stakeholders and agencies. This group is chaired by food expert Derek Davis with the principle objective to overcome previous fragmentation of effort by securing commitment to the framework.

There are clearly indentified priority tasks within the framework, the responsibility for which will be shared amongst the key stakeholders with timelines allocated. These tasks are focused around the key themes of:

1. Brand development and promotion to communicate a clear message to the consumer as to Ireland's product offering.

2. Quality and value which are the cornerstones of visitor satisfaction.

3. Business and sector supports to enhance skill capability and encourage innovation.

4. Research and benchmarking to ensure the group have up to date and accurate information on which decisions can be based.

The overall vision for food tourism is that Ireland be recognized by visitors for the availability, quality and value of our local and regional food experiences which evokes a unique sense of place, culture and hospitality. Not only will this have a positive impact on the consumers overall food experience but successful implementation of the framework offers the potential for new business and employment opportunities for suppliers, producers and providers across the food tourism value chain.

INTRODUCTION

In Ireland, tourist expenditure on food and drink in 2009 was close to €2 billion, representing the largest single component of individual visitor expenditure and exceeding the average spend on 'bed and board'.[1] Most tourist destinations, noticeably those within our competitive set, are now paying close attention to food tourism as a means of increasing visitor numbers and revenue, with the result that the development and promotion of food tourism plays an ever increasing role in national tourism strategy, particularly in countries such as Scotland and Wales. In line with this, the development of local and regional food destinations is also a growing trend globally, whereby food-related activities and events comprise a key feature of attracting increased numbers of visitors to particular localities.

Food tourism is a broad area and while there is no universally accepted definition, it is often described as travel to specific locations – with varying degrees of motivation – to sample cuisine unique to that area in order to gain a real sense of place. Although, for a small number of tourists food is the primary motivator of the visit – normally referred to as culinary or gastro tourism, all visitors sample food during their stay and as such the quality of food-related experience is of paramount importance. From a development perspective, Fáilte Ireland is concerned with two aspects of food tourism:

- **Destination Marketing**

There is a need to promote Ireland as 'The Food Island' to domestic and international visitors alike and Fáilte Ireland, along with other key stakeholders such as Tourism Ireland and Bord Bia, is actively involved in that effort.

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[1] Failte Ireland, 2010

- **Food in Tourism**

To ensure that food tourism marketing promises are delivered upon in practice for visitors, Fáilte Ireland, in preparing this National Implementation Framework, is primarily focused on ensuring that critical *food in tourism* components – the customer- facing aspects of the visit such as the availability and variety of food experiences, food and service quality, value for money and the experience offered at food-related events/ activities – consistently exceed expectations. These are vital areas of concern, because not only do they impact on visitor satisfaction, which is essential to maintaining our general competitiveness, but the overall quality of food- related experiences will contribute directly to the broader goal of building Ireland's reputation as a leading food tourism destination. As a result, the immediate focus must be on enhancing all 'food in tourism' components to ensure that visitor expectations generated by destination marketing activities are consistently exceeded.

A review of our visitor perceptions has highlighted that Ireland has much to be proud of and feedback from visitors is generally positive with regard to the levels of service experienced in food establishments. On a less positive note, findings also indicate that price competitiveness is a concern for some visitors and that there is a need to ensure that quality is consistently high across all food0related experiences. Despite these challenges, given our reputation a natural, unspoiled location and the positive correlation this has with food tourism, there is considerable potential to build on success to date. Fáilte Ireland is confident that potential growth opportunities within food tourism can be maximized by expanding the number and variety of authentic, high quality experiences in key destinations across the country which provide greater exposure to proven unique selling points such as our culture and people.

In terms of expanding our share of the food tourism market, the analysis of current performance has further indicated that the fragmented nature of the industry and the diversity of stakeholders involved have led to an absence of strategic focus and a lack of coordination of activities. Therefore, to ensure that Ireland not only competes, but is a leader as regards the quality and value of food-related experiences, a clear, objective-driven plan, which facilitates improved cooperation between stakeholders, is essential. To this end, Fáilte Ireland has prepared the National Food Tourism Implementation Framework.

STAKEHOLDER DRIVEN DEVELOPMENT

Fáilte Ireland recognizes that there are many parties directly and indirectly involved in food tourism including producers, suppliers, providers and food-related attractions/events and other experiences. There are also important state agencies such as Bord Bia and Tourism Ireland, as well as private representative bodies and marketing groups, which have a vital role to play in developing and promoting the sector.

In preparing the implementation framework, Fáilte Ireland is not seeking to replicate, or indeed replace the existing efforts of these stakeholders but rather to serve as a facilitator for greater cohesion and direction between all concerned.

In order to harness direct stakeholder involvement in the development and delivery of the framework and to integrate the strategic objectives of the Department of Tourism, Culture and Sport and the Department of Agriculture, Forestry and Food, Fáilte Ireland established an *Industry Working Group* in May 2010. Chaired by Derek Davis, the Group is comprised of representatives drawn from relevant industry agencies, representative groups, the food service sector and food focused events/activities as shown in Appendix 1.

The primary role of the Working Group to date has been to guide the development of the National Implementation Framework. As a result of this stakeholder-driven approach, Fáilte Ireland will be in a better position to not only achieve its own stated goals as regards food tourism, but also to deliver real benefits for all stakeholders, including: enhanced marketing and promotion, increased visitor awareness and satisfaction, better business opportunities for producers, and ultimately the potential for greater profitability and sustainability for all those involved in food tourism.

BASIS FOR THE NATIONAL FOOD TOURISM IMPLEMENTATION FRAMEWORK

The National Food Tourism Implementation Framework described in this document has been developed in line with a Visitor Experiential Model which is shown below.

The Visitor Experiential Model is concerned with ensuring that food-related experiences in Ireland are of a world class standing, particularly with regard to three critical dimensions:

- **Quality and Value** – Ensuring that the quality of food and service offered to visitors across a wide variety of outlets is of a consistently high standard and competitively priced. Equally, the overall quality of the visitor experience provided at food festivals, events and activities is also important.

- **Availability** – Expanding the number and variety of food-related experiences through community-driven activity to ensure that an attractive mix of high-quality offerings is available which maximises the potential for visitors to sample locally produced food. This, in turn will create new business opportunities and routes to market for local producers.

- **Authenticity** – Ensuring that all food experiences promoted to visitors offer a unique and distinctive Irish flavour and are reflective of our image as a natural, unspoilt and hospitable destination.

To facilitate the achievement of these outcomes, there will also be a focus on three supporting activities which provides for better research into consumer expectations to guide decision-making, strengthens the branding and marketing of food tourism and expands the supports available for those involved in the sector. The Visitor Experiential Model, and the National Food Tourism Implementation Framework that has arisen from it, offers clear direction for all stakeholders and the partnership model established to guide its development will continue to deliver greater cohesion and consistency of approach in the years ahead.

This document summarises the National Food Tourism Implementation Framework 2011-2013 and outlines the prioritised activities which will realise the defined strategic objectives.

Visitor Experiential Model

Research and Benchmarking

Quality and Value

Marketing and Promotion

Enhanced Visitor Experience

Availability

Authenticity

Business and Sector Supports

FOOD TOURISM – SUMMARY OF CURRENT POSITION

Ireland is not a newcomer to food tourism and has much to offer the visitor, with many high quality food outlets, festivals and events and other food-related activities already in place. To support the development of the implementation framework, detailed research and benchmarking was undertaken and a snapshot of findings is highlighted here:

ECONOMIC VALUE

Tourists spent close to €2 billion on food and drink in Ireland in 2009 and of this total, an estimated €1.5 billion was spent by tourists on food, with non-alcoholic and alcoholic drink each accounting for approximately €250 million sales. Overseas visitors account for 60% of the total, spending an estimated €1.2 billion last year, while the expenditure on food and drink by domestic tourists is estimated at over €700 million.

TOP LINE VALUE OF TOURISM FOOD AND DRINK
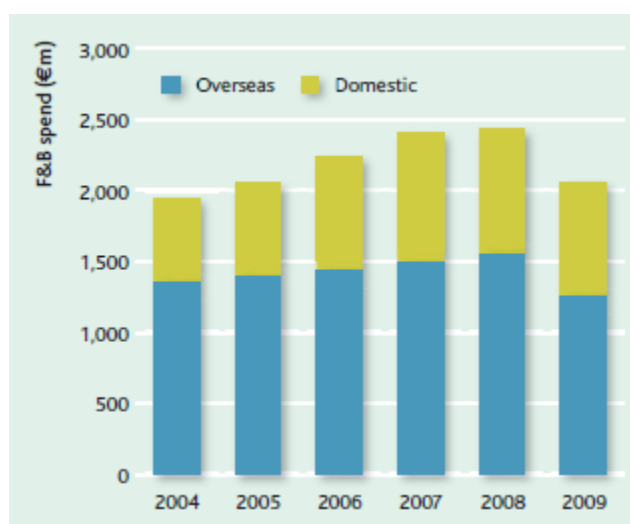
Tourist expenditure on food and drink in Ireland peaked in 2008, with an estimated expenditure of just over €2.3 billion. The downturn in 2009 reflects the decline in tourist volumes and expenditure when overseas visitor numbers fell by 12% and revenue by 19%. While the number of domestic trips held up, expenditure by Irish residents on trips declined by 10% in 2009 compared to the previous year.

Food and drink represents the largest component of visitor expenditure in Ireland and exceeds the average spent on 'bed and board'. An estimated 36% of visitor expenditure is on food and drink outside of accommodation; in light of this, the economic linkages are very obvious between the hospitality sector, agriculture providers, value-added providers and distributors.

VISITOR MOTIVATIONS

OVERSEAS

The importance of good food or gastronomy varies among Ireland's target segment of 'sightseers and culture seekers' in the key source markets. Tourism Ireland research would suggest that experiencing local food/drink/cuisine while on holiday is ranked very highly in top source markets of Britain and US, while countries such as France, Germany and Italy, which have a strong gastronomy culture, ranked this activity lower in importance but still relatively high compared to other activities.

While the quintessential appeals of Ireland remain its people and scenery, not withstanding changes in the composition of tourism to the country, a 'variety of good food' is an important factor in considering Ireland as a holiday destination – with 57% of visitors citing this factor (Visitor Attitudes Survey 2009). Food is a good strategic fit with Ireland's appeals and motivators of beautiful scenery, a natural unspoilt environment and friendly hospitable people and a genuine Irish food experience adds to the sense of place for the visitor.

DOMESTIC

The growing interest in food on the part of the Irish consumer is reflected in many aspects of Irish life and behaviour. This is clearly reflected in the increased presence of food features in the media, the expansion in the number of farmers' markets, the growth in demonstrations and cookery schools, and the range of restaurants and pubs featuring an international menu range.

The growing interest is typified by the expanding attendance at food fairs, such as the Taste of Dublin, Savour Kilkenny and Kinsale Gourmet Festival amongst others. Hotels and pubs are the most popular eateries for domestic holidaymakers, with almost two out of every three saying they eat in a hotel and over half having eaten in a pub. Restaurants (medium and high priced) are used by two out of five, while one in four used budget restaurants.

VISITOR SATISFACTION LEVELS

FOOD EXPERIENCE

The experience, as regards food variety, exceeds the expectations for most visitors and comes as a good surprise for many. American visitors experienced the biggest surprise with the experience exceeding the expectation for 80% of them. The expectations were exceeded for between half and two thirds of visitors from each of the main source markets.

However, there is no room for complacency as the food experience failed to meet the expectations of a sizeable share of visitors, with 30% of British visitors arriving by ferry, 25% of Germans and 19% of British arriving by air, disappointed with their experience.

QUALITY/SERVICE

Visitors rate the quality and service of the Irish food experience relatively highly, while dissatisfaction levels and disappointment against expectations is driven more by price and value assessment than failure to deliver quality and service. Approximately four out of five are satisfied with both the quality and the service aspects of their food and drink experience while on holiday in Ireland, with service being rated slightly higher than quality in most instances.

VALUE FOR MONEY

Food costs are cited by 7% of visitors as a disadvantage of an Ireland holiday – the fourth most frequently mentioned complaint by visitors after the high cost of living (25%); weather (17%) and bad roads (10%).

For domestic visitors, customer service and overall quality were rated higher than satisfaction with price, with approximately two out of three very satisfied with service and quality, compared to only 40% being very satisfied with price. Hotel restaurants received the highest score for overall quality and cost, while other accommodation restaurants scored best on customer service. Pubs, mid/high priced and budget restaurants underperform relative to the average scores recorded.

SECTOR COMPOSITION AND EMPLOYMENT LEVELS

As can be seen from the table below, food in tourism encompasses many enterprises, of varying size, across the value chain. This diversity, while positive from a visitor perspective creates many challenges in terms of addressing issues such as sustaining high quality across all elements and delivering value for money for visitors.

CATEGORY	ESTABLISHMENTS	EMPLOYEES
Producers (artisan, speciality and small food firms)	350	3,000 est. (Source: Bord Bia)
Hotels	902	52,300
Guesthouses	303	1,900
Self Catering Comprises – 95 Caravan and Camping, 103 Hostels, 196 Group Self catering	421	3,000
Licensed Restaurants	2,295	32,900
Non Licensed Restaurants	1,337	16,100
Public Houses	7,843	54,000
Food Markets This includes Farmer and Country Markets, of which 34 adhere to the Good Practice Standard for Farmers' Markets launched by Bord Bia June 2009	186	N/A
Food Festivals	47	
Cookery Schools	42	
Total	13,696	163,200

Failte Ireland 2010

FOOD TOURISM SWOT ANALYSIS

To capture the findings of the research and benchmarking undertaken during the development phase, Fáilte Ireland prepared a detailed SWOT matrix for food tourism which is shown in Appendix 2. With regard to the core aspects of the Visitor Experiential Model, the findings from the SWOT highlight:

- Ireland's favourable image as a natural and relatively unspoilt 'green' destination and, by correlation, the positive image this can generate for locally produced food, is a key strength and provides a strong platform for creating authentic experiences. However, a failure to truly differentiate food tourism in an Irish context will significantly reduce the real competitive advantage over competing destinations.

- Food creates a link to interacting with local people which is of significant importance for visitors and can be a vehicle for experiencing our culture and heritage. This again provides opportunities for promoting experiences that are uniquely Irish.

- There are many opportunities to enhance the marketing of Ireland as a food tourism destination, including aligning those efforts to established food and drink brands, or internationally renowned Irish food heroes. Also, food imagery is currently not well represented in any promotional literature and as a result it is not seen by existing visitors as a main attraction or a unique selling point for Ireland. At the same time, there is a substantial reputational risk if food-related experiences which are marketed and promoted to visitors fail to deliver on marketing promises.

- There is an existing pool of high quality, authentic food tourism products, activities and events distributed throughout key destinations across the country. However, the absence of a comprehensive inventory of food tourism experiences inhibits effective planning and decision-making as to where gaps may lie.

- Feedback from visitors with regard to the quality of food and service experienced during their visit is generally positive, although in a competitive global tourism industry, there is no room for complacency in this regard and indeed, perceptions of value are a concern for many visitors. In addition, it is imperative to continuously identify and respond to changing consumer demands and trends which may impact on visitor expectations in future.

- One of the more important practical challenges identified is the need to increase the accessibility of locally produced food for visitors, so that they may enjoy the best food that Ireland has to offer as part of their wider holiday experience. At present, for a variety of reasons, such as the perceived higher cost of using local produce, it can be difficult for visitors to easily and regularly find locally produced food on menus in hotels, restaurants, bars and other food outlets.

These summary findings taken from the SWOT analysis clearly indicate that there are a number of critical challenges, as well as prime opportunities, for food tourism. In addition, Fáilte Ireland's recent participation in the 2010 *Culinary Tourism World Summit* in Canada confirms that Ireland has correctly identified the necessary developments in this area and through greater coordination of effort between all stakeholders is well placed to build on success to date. From a tourism perspective, our focus is consumer oriented however, it is envisaged that there will be significant benefits to stakeholders in increased business opportunities for suppliers, producers and providers upon full commitment to and implementation of the framework.
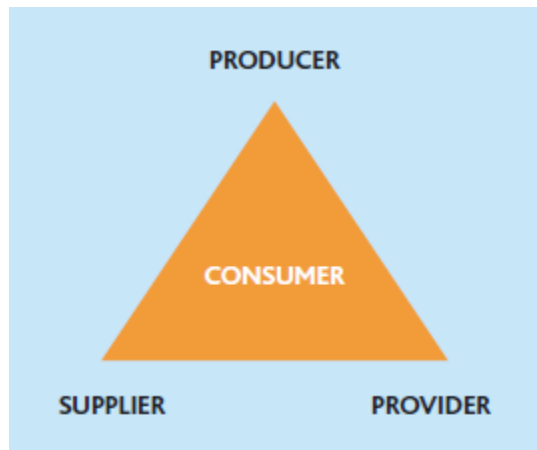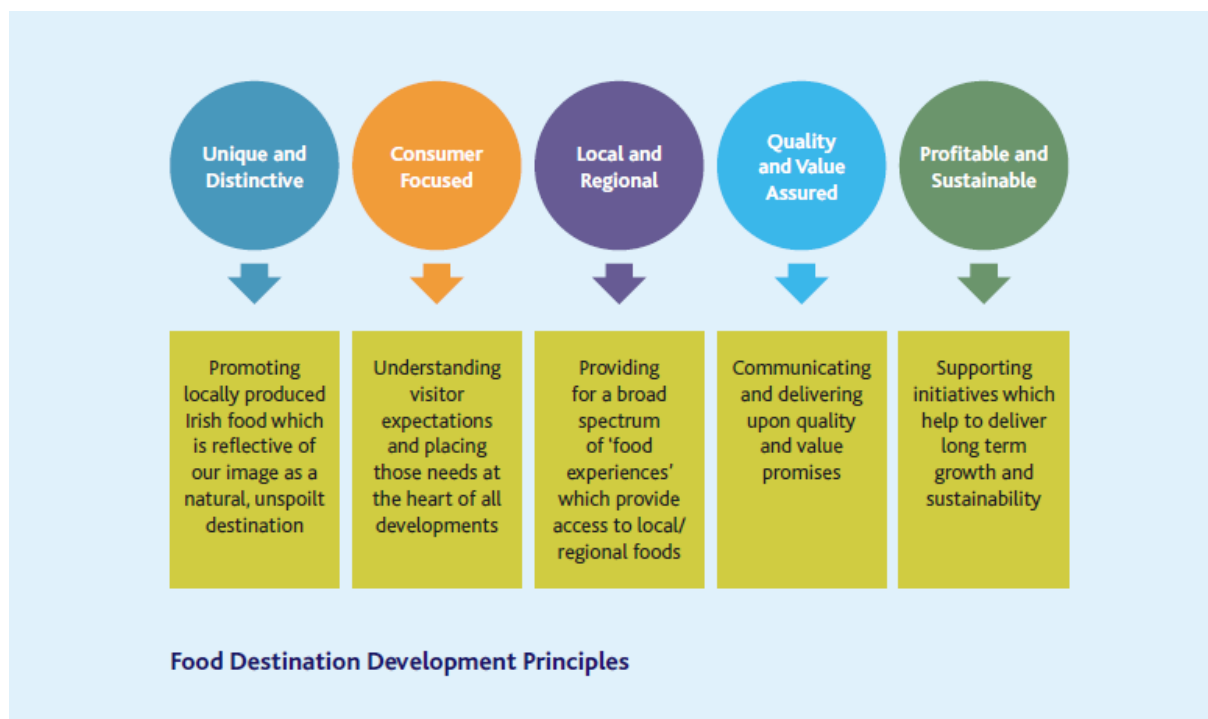

The remainder of the document describes the agreed implementation framework, which has been devised in direct response to the critical challenges and opportunities identified during the research phase, and demonstrates how the stated benefits will accrue for stakeholders through the agreed implementation priorities.

THE NATIONAL FOOD TOURISM FRAMEWORK

The National Food Tourism Implementation Framework – part of Fáilte Ireland's wider commitment to developing key tourism destinations – is concerned with enhancing the overall visitor experience across all food-related experiences in order to deliver on marketing promises and support the effort to position Ireland as a leading food tourism destination.

In addition, the framework has the potential to deliver tangible returns for stakeholders such as better business opportunities for producers, an enhanced consumer experience and overall growth in food tourism related revenue and employment.

To underpin the development of the framework presented in this section, it was agreed amongst the Industry Working Group that the fundamental principles outlined below were paramount:

Unique and Distinctive	Consumer Focused	Local and Regional	Quality and Value Assured	Profitable and Sustainable
Promoting locally produced Irish food which is reflective of our image as a natural, unspoilt destination	Understanding visitor expectations and placing those needs at the heart of all developments	Providing for a broad spectrum of 'food experiences' which provide access to local/regional foods	Communicating and delivering upon quality and value promises	Supporting initiatives which help to deliver long term growth and sustainability

Food Destination Development Principles

The implementation framework, designed in line with these principles, is primarily concerned with increasing the availability, authenticity, quality and value for money of local and regional food-related experiences. These food experiences must respond to consumer expectations and be reflective of those qualities which research continuously shows makes holidaying in Ireland so unique; namely, our culture, people and the unspoiled environment. A strong emphasis is therefore placed on expanding the range and scope of value-driven food-related experiences for visitors, which offer them a real sense of Irish food, people and places.

The successful application of the National Implementation Framework will deliver the following benefits:

- **More Effective Marketing and Promotion:** building on and supporting existing approaches to deliver a clear and consistent message to domestic and international visitors regarding the variety of food experiences available.

- **Develop Reputation for Quality Food and Value:** resulting from the clearer strategic direction offered by the framework and through greater coordination of activities to maximise impact.

- **Increased Visitor Satisfaction:** arising from the enhanced visitor experience that will accrue from the consistent focus on the availability, quality, value and authenticity of food-related experiences.

- **Improved Profitability:** through the creation of new/improved business opportunities and from the provision of a range of targeted supports for operators addressing issues such as competitiveness, profitability and sustainability as well as helping stakeholders to deliver high quality, value for money experiences for consumers.

- **Increased Visitor Numbers and Revenue:** although not an immediate return, a greater targeting of the food tourism market, coupled with the delivery of memorable food experiences, will over the longer term lead to an increase in visitor numbers and spend. This will also have a positive impact on employment levels in the sector.

VISION FOR FODD TOURISM IN IRELAND

The Implementation Framework, concerned as it is with delivering memorable food experiences for visitors is guided by a new *Vision* which is:

'Ireland will be recognised by visitors for the availability, quality and value of our local and regional food experiences which evokes a unique sense of place, culture and hospitality'.

KEY ACTIVITIES AND OBJECTIVES

Realising this vision will require shared ownership in tackling a range of measures across *five areas of activity* which will serve as the strategic focus of all development efforts. As shown below, these activities are intended to directly respond to the critical challenges and opportunities identified through the SWOT analysis within food tourism at present:

Key Activities and Objectives

CRITICAL CHALLENGES – SWOT	RESPONSES	OBJECTIVES
Lack of national vision and strategic objectives for the future development of food tourism	**Key Activity 1** **Partnering and Facilitating** *Creating cohesion and unity of purpose between key stakeholders*	• Work with relevant industry groups/ agencies to finalise the National Food Tourism Implementation Framework. • Partner with key stakeholders to coordinate and integrate all activities aimed at implementing the plan and raising the profile and contribution of food tourism.
Limited consumer, market and performance research data to support decision-making in the sector	**Key Activity 2** **Research and Benchmarking** *Supporting fact-based planning and decision-making*	• Identify current research gaps related to food tourism, from both consumer and industry perspectives, and agree an effective research model. • Assign ownership amongst key stakeholders to gather the necessary performance and trend data to guide future decision-making.
Fragmented nature of the industry reduces the scope, cohesion and ultimately the impact of marketing activities undertaken	**Key Activity 3** **Brand Development and Promotion** *Strengthening the positioning of Ireland as a food tourism destination*	• Agree an integrated and consumer focused brand identity for food tourism which unifies current approaches and enhances Ireland's image as a food destination. • Develop a marketing strategy and utilise innovative communication and promotion vehicles to generate increased awareness and improved access to information for visitors.
Reduction in impact of food tourism development efforts if the quality of food-related experiences fails to live up to expectations, or if existing negative value perceptions are not adequately addressed	**Key Activity 4** **Quality and Value** *Ensuring that a variety of high quality, price competitive visitor experiences is on offer*	• Engage with industry stakeholders to identify new demand-driven food experiences and to drive improvements in service quality improvements. • Advocate for, and promote initiatives which will address negative value perceptions and raise price competitiveness.
Small scale nature of operations places limitations in terms of business management capabilities and capacity for innovation	**Key Activity 5** **Business and Sector Supports** *Helping industry operators to build their capabilities and improve business performance*	• Devise and deliver targeted and business and sector supports. • Develop education and training programmes which seek to build individual and collective capabilities to deliver high value, authentic Irish food experiences.

IMPLEMENTATION PLAN

This section provides detail on the agreed objectives and related priority tasks required in the Implementation Framework. Roles and responsibilities for these actions will be shared amongst the key stakeholders, and timelines for commencement established, as part of the ongoing consultation process. The proposed Implementation Framework for food tourism is shown:
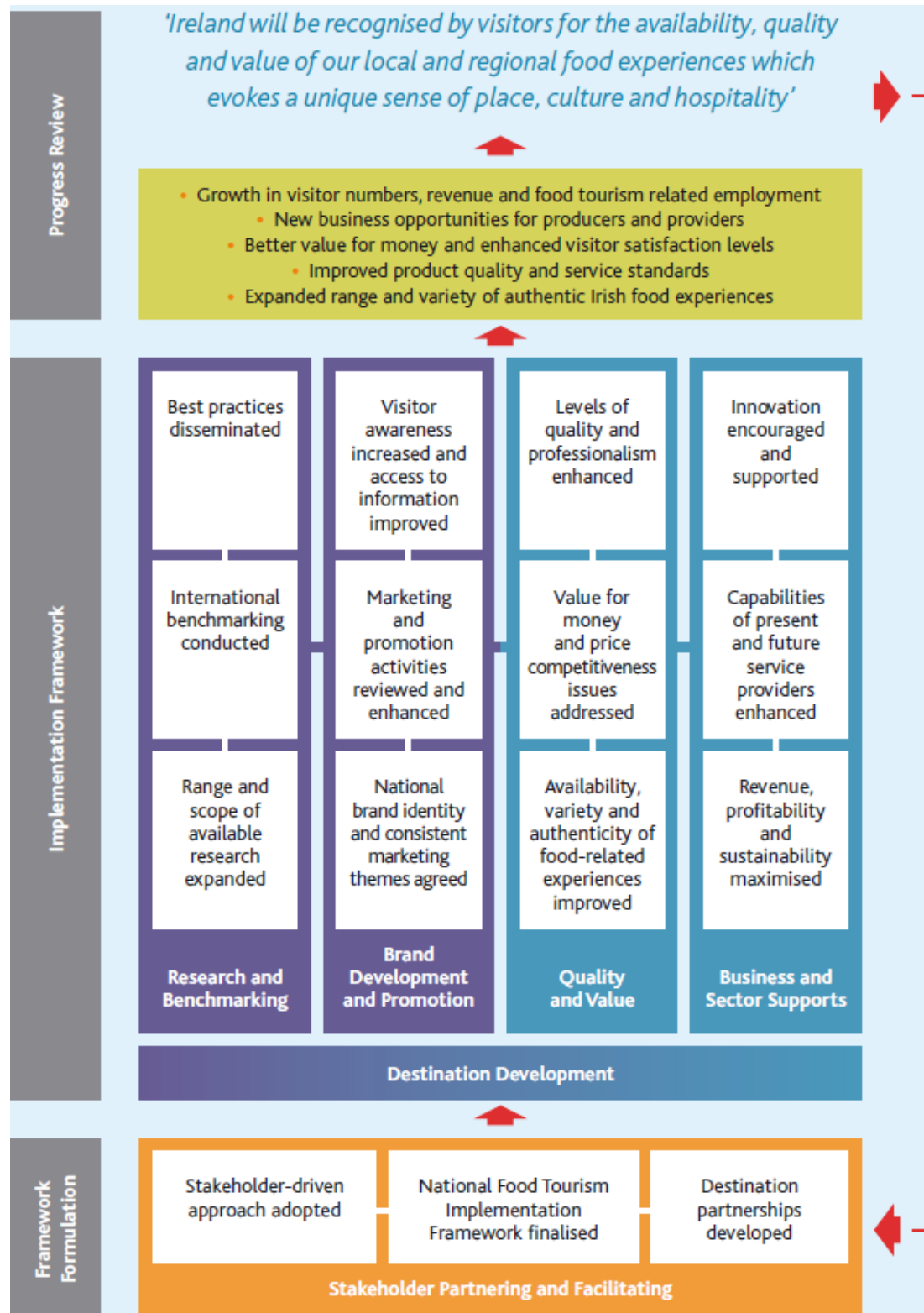
The focus of all actions within *Partnering and Facilitating* will be to ensure that future developments are coordinated where necessary and cohesive in their implementation. This, of course, presents challenges as each stakeholder grouping has its own needs and expectations; however, to maximise impact, it is important that all stakeholders look beyond self-interest and work together to deliver the agreed strategic outcomes. Progress in this regard has been positive to date, as interactions within the Industry Working Group have highlighted the shared goals and mutual benefits to be gained from working more closely together.

Once the Implementation Framework is launched, Fáilte Ireland will work with providers in key destinations to review and enhance key food related experiences. This will involve identifying gaps in the existing offering, devising innovative responses and adopting coordinated responses to address value and quality issues. Priority tasks in this area include:

Partnering and Facilitating

DELIVERABLES	PRIORITY TASKS
1. **Stakeholder-driven approach adopted**	• Establish an Industry Working Group to guide the development of a National Food Tourism Implementation Framework.
	• Provide ongoing guidance and support to stakeholder representative groups and food activities.
	• Serve as a catalyst to encourage greater coordination of effort between stakeholders in food tourism through creating and supporting national, regional and local networks.
2. **National Food Tourism Implementation Framework finalised**	• Conduct research on food tourism trends in comparable destinations.
	• Agree implementation tasks with the Industry Working Group and allocate roles and responsibilities.
	• Prepare and launch the National Food Tourism Implementation Framework.
3. **Destination partnerships developed**	• Collaborate with international experts/destinations to support all future food tourism developments in Ireland.
	• Develop initiatives, regionally and nationally focused, to define the necessary actions to address priority value and quality concerns.
	• Encourage the creation of local networks to help identify and remove barriers between producers, suppliers and providers in order to increase the use of local produce in food outlets.

The emphasis under *Research and Benchmarking* will be to ensure that future developments and plans are guided by accurate and up-to-date research, particularly in relation to consumer needs and expectations as regards food and food-related experiences. An important outcome here will be to define an overall research framework, with agreed roles and responsibilities for data collection and dissemination, so that all those involved in food tourism have the best information available to help them to more effectively plan their activities in future. Priority tasks in this area include:

Research and Benchmarking

DELIVERABLES	PRIORITY TASKS
4. Range and scope of available research expanded	• Conduct research in order to: - Establish the actual and potential revenue generated by Food Tourism in Ireland; - Compare Ireland's performance with international destinations; - Determine consumer perspectives related to Food Tourism e.g. value, quality, information accessibility.
	• Identify current research and knowledge gaps which are inhibiting effective planning across food tourism.
	• Agree a new research framework for food tourism and define future roles and responsibilities for compiling the data.
5. International benchmarking conducted	• Conduct a comprehensive international benchmarking exercise to define critical success factors for the management, coordination and promotion of food tourism at a national level.
	• Apply the relevant lessons learned from the benchmarking exercise in an Irish context.
	• Identify best practice guidelines for establishing and sustaining local cooperation models and networks in food tourism.
6. Best practices disseminated	• Develop an online trade information platform to serve as a resource tool for food tourism producers, providers and operators of activities and events.
	• Host best practice forums to share expertise and update stakeholders on trends and developments.
	• Identify food heroes/champions and develop case studies capturing their experiences.

Brand Development and Promotion will focus initially on the development and market testing of an over arching brand, which will be consistently used, resulting in a clear message about Ireland's food offering to both the international and domestic visitor. The promotion element will involve not just the inclusion of relevant imagery in promotional literature but also improved communication platforms will be introduced to inform visitors of food experiences to potentially visit during their stay increasing the awareness of what Ireland has to offer in terms of food tourism. Priority tasks under Brand Development and Promotion include:

Brand Development and Promotion

DELIVERABLES	PRIORITY TASKS
7. **National brand identity and consistent marketing themes agreed**	• In collaboration with Tourism Ireland and Bord Bia, agree a national brand and consistent marketing theme for food tourism – such as *Ireland, the Food Island*, or similar – and integrate that branding concept and relevant food imagery into all national and international promotion and communication activities.
	• Explore with Northern Ireland Tourism Board (NITB) the potential to brand and promote food tourism on an all-island basis.
	• Finalise the 'Place on a Plate' concept as a vehicle to develop, promote and deliver memorable food experiences. Select appropriate locations to pilot the concept and develop a domestic and international communications plan.
8. **Marketing and promotion activities reviewed and enhanced**	• Improve the coordination of food tourism promotional activities between Fáilte Ireland, Tourism Ireland, Bord Bia and the NITB.
	• Provide marketing advice and support for food providers and organisers of food-related experiences.
	• Compile an asset-inventory of food products and experiences which are interested in targeting the consumer in order to better market them to visitors.
9. **Visitor awareness increased and access to information improved**	• Further develop the Discover Ireland websites to serve as the main consumer portal for food tourism.
	• Review all relevant domestic and overseas promotional literature to better reflect the agreed food tourism brand concept.
	• Explore the potential of identifying towns and locales as home to artisan producers through signposting.

Quality and Value are the cornerstones of visitor satisfaction in relation to food tourism. Research indicates that a significant challenge for Ireland is the perceived poor value of our food offering highlighting the importance of action in this area. In conjunction with the Working Group and key stakeholders, the focus will be to address the value issue while providing supports and initiatives to drive product and service quality. Due to the high number and diversity of players involved, it is the responsibility of all the main players in the value chain to address and take ownership of both the quality and value of their offering. Priority tasks in this area include:

Quality and Value

DELIVERABLES	PRIORITY TASKS
10. Availability, variety and authenticity of food-related experiences improved	• Evaluate consumer research and international benchmarks to define consumer expectations in terms of the nature, scope and quality of food experiences in Ireland.
	• Review the mix of existing food-related experiences to identify current gaps, or product development opportunities, in light of consumer research.
	• In line with the 'Place on a Plate' concept, work with key stakeholders to develop and launch new demand-driven food-related experiences.
11. Value for money and price competitiveness issues addressed	• Encourage, and facilitate as necessary, the cooperation of industry representative bodies in addressing the issue of poor value perception among consumers.
	• Build positive value messages into marketing campaigns (domestic and international) while highlighting the uniqueness and quality of product available. Use 'Place on a Plate' concept as part of communication vehicle.
	• Develop and disseminate specific business supports which builds operator capability in the context of delivering a competitively priced and value added product.
12. Levels of quality and professionalism enhanced	• Work with stakeholder representatives to raise quality standards across all customer-facing elements of the value chain, from producer to provider and incorporate appropriate food-related standards into all relevant quality schemes in tourism – Food B&Bs, Pubs, Self-Catering etc.
	• Develop a national hospitality initiative to build the service culture in hotels, restaurants and pubs and at farmers markets, festivals, producer visits etc.
	• Devise training initiatives to enhance professional skills in food preparation and service in hotels, restaurants, pubs, coffee shops etc.

Consultations with stakeholders to date have already identified a range of *Business and Sector Supports* needed for enterprises across the food tourism value chain, from producer to provider. Fáilte Ireland will work with relevant representative bodies who impact on the visitor experience, to help them to increase the range of business supports available to their members; through better promotion of existing resources and the development of new supports where a defined need is identified. In addition, Fáilte Ireland will help to strengthen linkages between the education sector and food tourism stakeholders to ensure that learning and professional development opportunities are available to those currently operating within the industry, and for future entrants. Additionally under Business and Sector Supports, Fáilte Ireland is also concerned with promoting innovation in food tourism and in supporting new initiatives which bridge existing gaps in food experiences. Priority tasks in this area include:

Business and Sector Supports

DELIVERABLES	PRIORITY TASKS
13. Revenue, profitability and sustainability maximised	• Develop a 'Food Tourism Toolkit', supported by appropriate online resources and workshops to support better business performance.
	• Devise and implement a 'Menu as a Marketing Tool' initiative to improve menu design, written descriptions and utilisation as a sales tool in building sales capabilities amongst relevant employees.
	• Provide ongoing mentoring services for stakeholder representative groups, food-related activity operators and individual producers and providers.
14. Capabilities of present and future service providers enhanced	• Conduct a training needs analysis (TNA) amongst food tourism producers, providers and activity operators to identify professional development priorities.
	• Establish an Education Sub-Committee to strengthen links between the Institutes of Technology and industry in order to better align needs, expectations and perspectives.
	• Evaluate the effectiveness of existing food tourism awareness modules to explore how food is represented in Tourism and Hospitality courses.
15. Innovation encouraged and supported	• Facilitate and enable innovation across the value chain through supporting networks, benchmarking activities and the sharing of best practice.
	• Conduct innovation workshops for food tourism operators.
	• Provide funding and sponsorship to support innovation and initiatives in improving the food experience of the visitor.

CONCLUSION

Irish tourism has shown sustained growth until recent years and the current downturn has reinforced the need to not only protect those features which have contributed to past achievements but to enhance existing, and develop new, tourism experiences in order to regain and improve competitiveness. To that end, Fáilte Ireland, working in partnership with key stakeholders, is keen to maximise our attractiveness as a food tourism destination in terms of variety, quality and perceived value for money. The implementation framework and key activities outlined in this document are intended to ensure that all food-related experiences exceed visitor expectations which will, over time, help to position Ireland in the future, as a leading destination for food tourists.

Fáilte Ireland will make a significant impact through its role as facilitator and by taking direct ownership for appropriate actions within the framework in areas such as research and benchmarking, branding and promotion, raising quality and standards and business/sector supports. However, to ensure that all the strategic objectives are realised and that the specific deliverables for the period are achieved, it is critical that all stakeholders are willing to come together to share responsibilities and apply their expertise in relevant areas; without that commitment, the potential for achievement will be reduced.

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Licensed Vintners Association	Donall O'Keeffe
Sector Entrepreneurs	Darina Allen
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The attached SWOT analysis was prepared following extensive research, benchmarking and consultation undertaken during the early development phase of the National Food Tourism Implementation Framework. Once its content was agreed with members of the Working Group, this SWOT analysis then served as the basis for the development of the framework itself. The key activities and related priority actions proposed are specifically designed to protect the strengths identified in food tourism here at present, counteract the weaknesses, capitalise on opportunities presented, and minimise the impact of threats.

STRENGTHS (+)	WEAKNESSES (-)
1. Ireland's favourable image as a natural and relatively unspoilt 'green' destination;	1. Lack of an agreed national vision and strategic objectives for the future development of food tourism;
2. Existing pool of high quality, authentic food tourism products, activities and events;	2. Limited consumer, market and performance research data to support decision-making in this area;
3. Established national, regional and local bodies, networks and associations in food tourism;	3. Insufficient cooperation and coordination amongst stakeholders in food tourism;
4. Good regional dispersal of food tourism products, activities and hallmark events;	4. Fragmented nature of the industry reduces the scope, cohesion and ultimately the impact of marketing activities undertaken;
5. Generally positive feedback from visitors with regard to the quality of food and service experienced during their visit;	5. Lack of a comprehensive inventory of food tourism experiences inhibits effective planning and decision-making;
6. Diverse mix of agricultural and seafood produce;	6. Inconsistency in the marketing message may prove confusing for consumers and information for consumers on food tourism is not as readily accessible as it could be;
7. Good traceability and quality standards of international standing in relation to Irish food products;	7. Small scale nature of operations places limitations in terms of individual skills and competences, business management capabilities and the capacity for innovation;
8. Ireland has a number of food items and dishes which are highly sought after by visitors;	8. Perceived 'high cost' of locally produced, natural produce;
9. Internationally renowned food and beverage brands;	9. Absence of a quality framework for food tourism enterprises, linked to the national model, increases the risk of inconsistent quality across the visitor experience;
10. Food creates a link to interacting with local people which is of significant importance for visitors and can be a vehicle for experiencing our culture and heritage.	10. Food is not well represented in promotional literature and it is not seen by existing visitors as a main attraction or a unique selling point for Ireland, so there is significant potential to build on this low base;
	11. Improved training is needed for chefs on the sourcing of local produce and in the skill levels required to prepare it to best effect.

OPPORTUNITIES (+)	THREATS (-)
1. Growing consumer interest in, and appreciation of locally produced food;	1. Growing emphasis in competing destinations on developing food tourism;
2. Potential to expand the profile, quality and number of food tourism 'experiences' available to visitors through greater innovation;	2. Failure to secure buy-in from key food tourism stakeholders to a National Implementation Framework;
3. Possibility of leveraging the reputation of established Irish food and drink brands internationally;	3. Inability of the plan to deliver tangible benefits for service providers may lead to declining support and involvement over the long term;
4. Ireland remains 'undersold' as a food tourism destination;	4. Continued fragmentation of effort due to the diverse stakeholder mix may lead to underperformance;
5. Increasing recognition in recent years, at home and abroad, of the diversity and quality of food in Ireland;	5. Current credit restrictions preventing existing and new business in food tourism from developing and expanding;
6. Relative small size of country facilitates the development of food trails incorporating a wide range of experiences;	6. Continued stagnation in visitor numbers from domestic and international markets may force some operators out of business;
7. Potential within the domestic market to raise the profile of Irish food and to enhance pride in home produced produce;	7. Reduction in impact of food tourism development efforts if the quality of food-related experiences fails to live up to expectations, or if existing negative value perceptions are not adequately addressed;
8. Opportunity to work with our international food heroes to promote food tourism;	8. Reputational risk if tourism enterprises which are marketed and promoted to visitors fail to deliver on marketing promises;
9. Further capitalise on the growing interest in home-cooking and entertaining by promoting cookery schools, farmers markets, food festivals and other events;	9. Inability to identify and respond to changing consumer demands and trends may impact on future potential for food tourism;
10. Potential to better communicate the value message to consumers to overcome existing misconceptions;	10. Failure to differentiate food tourism in an Irish context clearly enough will not generate real competitive advantage over competing destinations.
11. Maximise the commercial potential that can be derived from sourcing local produce, given the multiplier effect.	