THE COUNTY OF WELLINGTON
TASTE REAL

FOOD TOURISM STRATEGY:
EXECUTIVE SUMMARY
Ontario Culinary Tourism Alliance
41 Britain St. Suite 303
Toronto ON M5A 1R7
CH. 1 EXECUTIVE SUMMARY

Virtually any experience can be enriched by food and drink. When done well, food tourism can become a primary driver for visitations and a valuable tool to boost economic, social and community development. By increasing the opportunities for visitors (and locals) to enjoy an authentic “taste of place”, food tourism can have a significant impact on the viability of local food systems and allow the agricultural story of the destination to shine.

“With their proximity to food-producing lands, rural communities often enjoy a comparative advantage when it comes to serving up traditional fare – tourism allows these communities to generate income and employment locally.” - UNWTO Global Report on Food Tourism

THE COUNTY OF WELLINGTON TASTE REAL FOOD TOURISM STRATEGY

The County of Wellington Taste Real Food Tourism Strategy was developed to position the region as a food tourism destination. Significant opportunities exist to enhance the established Taste Real initiative to become a tourism driver for Guelph Wellington and to leverage the existing agricultural, food and beverage assets in the region. These assets include authentic on-farm experiences, a wealth of agricultural products, restaurants with a demonstrated focus on local sourcing, new and emerging craft breweries and popular festivals and events.

This Strategy was designed with a focus on meeting the strategic objectives of Taste Real (as listed on the Taste Real website), which fall into four categories:

- Build upon the current authentic local food networking by engaging agriculture, food and tourism partners and community ambassadors.
- Foster the creation of infrastructure and distribution networks throughout the supply chain.
- Develop, promote and deliver innovative products, services and experiences.
- Facilitate transfer of knowledge, skills and Best Practices to mobilize the strategy.

Recommendations contained in the Strategy were developed through inventory collection, market readiness assessment using the Experience Assessment Tool™ (EAT™), and stakeholder outreach. A Steering Committee, organized by Taste Real and the County of Wellington, was engaged throughout the development of the Strategy to provide insight and feedback.

FOOD/CULINARY TOURISM

Food tourism (also referred to as culinary tourism) is defined as “any tourism experience in which one learns about, appreciates, and/or consumes food and drink that reflects the local, regional or national cuisine, heritage, culture, tradition or culinary techniques of that region”. For the purposes of this report, “local” is defined as “from Ontario” (in accordance with the OMAFRA definition of the term) however specific attention has been paid to identifying opportunities to source and showcase products from within Wellington region. Highlighting the regionally specific assets will create Unique Selling Points (USPs) that can then be competitively marketed to consumers.

The Inventory Assessment and SWOTT Analysis prepared for this Strategy (see Chapter 4) included a review of any businesses that currently practiced local sourcing or had the potential to do so in the future. Any business that can be enriched by adding a “taste of place” (through

agriculture, local food and/or beverage) has the potential to become part of the food tourism value chain.

The food tourism value chain is composed of the following business categories:

- Accommodations
- Attractions
- Beverage Producers
- Culinary Schools
- Farmers’ Markets
- Festivals & Events
- Growers & Producers
- Restaurants
- Retailers
- Tour Operators

INVENTORY ASSESSMENT & SWOTT ANALYSIS

The food tourism Inventory Assessment was developed using the Experience Assessment Tool (EAT™), a proprietary software program developed by the Ontario Culinary Tourism Alliance. EAT™ considers more than 50 elements to assess whether a business offers an experience that will meet the expectations of food tourists and is therefore “market ready” (through the lens of food tourism). Businesses were assessed for way finding, web and social media presence, breadth and availability of experiences offered, partnerships within the community and, most importantly, commitment to and promotion of local sourcing.

Each of the nearly 400 food tourism businesses assessed in Wellington County have been assigned both a numerical rating of market readiness and a qualitative rating of “Champion”, “Leader”, “Follower”, “Subscriber” or “Unrated” (where no mention of local sourcing was found). This detailed assessment contributed to the results of the regional SWOTT Analysis (where SWOTT refers to Strengths, Weakness, Opportunities, Threats and Trends).

As the pyramid below illustrates, the largest portion of businesses typically fall in the “Subscriber” category, with the smallest portion of businesses receiving a “Champion” or “Leader” rating. These results were observed in the Wellington inventory and are consistent with the rating breakdown of other Ontario destinations. It should also be noted that while this assessment looked at food tourism market readiness, this type of tourism may not be the goal of all businesses in the inventory.

“Champion” and “leader” rated businesses offer authentic tastes/experiences of place. These businesses are MARKET READY, delivering a depth of experience that meets or exceeds the expectations of a local food tourist.

“Follower” and “subscriber” rated businesses have some local food and/or drink components but do not meet the expectations of a local food tourist. These businesses represent opportunity areas to expand their food tourism offerings.
## SWOTT Analysis: Regional Perspective

### STRENGTHS

- Rich agricultural heritage, high grade farmland, diversity of products grown in the region
- Strong farming community
- Authentic, on-farm experiences spread across the region
- Taste Real initiative and established brand within the regional community
- Broad scope of Taste Real with partners from across the food tourism value chain
- Existing Taste Real programs – Rural Romps, Local Food Fest, Local Food Map
- Existing local food organizations and initiatives
- Proximity to large urban market
- 150M North Americans reside within day trip to region
- Interest in developing Wellington County Chefs’ Network
- Growth of regional craft brewing industry
- Downtown Guelph restaurant scene
- Increase in tour operators offering food tourism experiences
- Diverse selection of festivals and events
- Several market ready festivals with the ability to attract young, urban market
- University of Guelph
- Outdoor trail system, G2G Rail Trail and cycling tourism
- Canadian Heritage river system and Elora Gorge
- First food truck permit issued for City of Guelph in Summer 2015
- History of Guelph Farmers’ Market
- Butter Tart Trail™ revamped in Spring 2015 to include criteria for participation
- Historic downtowns of Guelph and Elora Fergus
- DestinationNEXT project initiated for Guelph and Elora Fergus in 2015
- Cultural Plans developed for Townships of Minto, Mapleton and Wellington North
- Launch It Minto small business incubator
- Local Food Fest named Ontario Culinary Tourism Event of the Year (2015)
- Collaboration with UoGuelph City of Guelph and Guelph Chamber around Agri food business expansion and attraction (i.e. ON-EU Food Trade Forum)

### WEAKNESSES

- Limited selection of boutique accommodations with capacity to house large numbers of tourists
- Capacity of Taste Real to execute new initiatives
- Rural/city divide and intra-regional competition
- Disparity between incomes of rural and urban populations
- Limited market readiness of rural businesses and ability to attract food tourists
- Limited web presence of rural businesses
- Perception of Wellington County as a place to live, as opposed to visit (not a tourism draw)
- Limited brand recognition of Taste Real outside region

### OPPORTUNITIES

- Establish Wellington County as a food tourism destination
- Establish Taste Real brand outside region
- Increase market readiness of individual businesses (see Ch. 7)
- Enhance existing Taste Real initiative (see Ch. 8)
- Enhance existing Taste Real programs (see Ch. 9)
- Create Taste Real In Real Life (IRL) product to promote market ready businesses and attract tourists (see Ch. 10)
- Host media and influencer FAMs
- Establish Wellington County as destination for craft beer experiences
- Increase programming at Guelph Farmers’ Market location
- Develop, enhance and collaboratively market riverfront and Elora Gorge experiences
- Invest in Wifi + charging centers
- Develop a regionally branded food magazine
- Increase number of Feast ON designees in Guelph Wellington and create collective marketing campaign
- Leverage existing and nearby markets
- Attract Millennial demographic

### THREATS

- Competition from rural destinations
- Competition from emerging craft beer regions
- Oversaturation of festivals, events
- Perceived barriers, concerns to agritourism (e.g. liability)
- Competition from destinations with accommodations
- Resources and budget to support food tourism initiatives
- Disconnect and lack of communication between RTO and DMO-funded initiatives
- Competition from nearby destinations with food tourism experiences (e.g. Stratford, Niagara)
- Sustainability of volunteer driven initiatives
Products and experiences referred to as “Champions” and “Leaders” are MARKET READY and should be celebrated as Best Practice examples of food tourism in the region. These businesses should be encouraged to potentially take on a leadership role, providing mentoring to other food tourism stakeholders and helping to elevate the level of food tourism market readiness in the region.

Businesses that have some degree of authentic food tourism offerings but are not currently delivering on the expectations of a tourist have received a rating of “Follower” or “Subscriber”. Individual business development opportunities exist to increase the market readiness of these businesses and elevate the regional market readiness as a result. For “Followers”, often only small improvements are required to elevate their market readiness rating to a “Leader” rating. Establishing criteria for food tourism products will give “Followers” and “Subscribers” an opportunity to participate and also increase their market readiness.

OPPORTUNITIES & RECOMMENDATIONS

Outreach to stakeholders and the Steering Committee, in addition to the Inventory Assessment and SWOTT Analysis, identified a number of opportunities for encouraging and enhancing food tourism in Guelph Wellington.

This Strategy has prioritized those opportunities that are:

1. Fundamental for building a sustainable foundation for food tourism and
2. Have the ability to enhance and improve the region’s food tourism offerings in the short to medium term.

Recommendations fall under three main categories:

1. **Educate & Engage**

2. **Enhanced Product Development**

3. **Fundamental Product Development**

Prioritized recommendations have associated Action Plans, which are found in Chapters 7-10 of this Strategy. The role of Taste Real is specific to each tactic and may take the form of leadership, support, promotion and/or marketing. New and existing partnerships between Taste Real and other organizations are strongly encouraged to share responsibility, provide additional expertise and overcome capacity issues.

1. **EDUCATE & ENGAGE (see Chapter 7)**

Fundamental to successful destination and product development is engagement and education, particularly to increase the individual market readiness of businesses in the region, strengthen the
food tourism value chain, and create networking opportunities for partnerships among stakeholders.

<table>
<thead>
<tr>
<th>Tactic</th>
<th>Objectives</th>
<th>Priority</th>
<th>Role of Taste Real</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Expand Source It Here event</td>
<td>Provide market readiness training (added value for Taste Real partners)</td>
<td>1</td>
<td>Lead</td>
<td>Q1 2016</td>
</tr>
<tr>
<td>(see Ch. 7)</td>
<td>Create partnerships</td>
<td></td>
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<tr>
<td>2. Host Workshops</td>
<td>Increase market readiness</td>
<td>1</td>
<td>Support (partner with workshop providers)</td>
<td>Q1, Q4 2016 – On-going</td>
</tr>
<tr>
<td>(see Ch. 7)</td>
<td>Create partnerships</td>
<td></td>
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<tr>
<td>3. Provide Training and Resources</td>
<td>Increase market readiness</td>
<td>2</td>
<td>Lead</td>
<td>2016 – On-going</td>
</tr>
<tr>
<td>(see Ch. 11)</td>
<td>Increase partnerships</td>
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<td></td>
<td>Promote innovation and business development</td>
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2. ENHANCED PRODUCT DEVELOPMENT (see Chapters 8 and 9)

This Strategy identifies significant opportunities to improve or enhance existing tourism products and experiences to increase their attractiveness to food tourists.

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<tbody>
<tr>
<td>1. Enhance Taste Real Program</td>
<td>Revise criteria</td>
<td>1</td>
<td>Lead</td>
<td>Q1 2016 – On-going</td>
</tr>
<tr>
<td>(see Ch. 8)</td>
<td>Expand website to include In Real Life product</td>
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<td></td>
<td>Increase social media presence</td>
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<td></td>
<td>Increase membership</td>
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<td></td>
<td>Communicate added value opportunities available to Taste Real partners</td>
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<tr>
<td>2. Enhance Taste Real Rural Romps</td>
<td>Add “Taste the Romp”</td>
<td>1</td>
<td>Lead</td>
<td>Q2 2016 – On-going</td>
</tr>
<tr>
<td>(see Ch. 9)</td>
<td>Increase participation from off-farm Taste Real partners</td>
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<tr>
<td></td>
<td>Host media / influencer FAM</td>
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<tr>
<td>3. Enhance Local Food Fest</td>
<td>Measure local food procurement</td>
<td>1</td>
<td>Lead</td>
<td>Q2-Q3 2016 – On-going</td>
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<tr>
<td>(see Ch. 9)</td>
<td>Develop vendor criteria</td>
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<td></td>
<td>Increase programming partnerships</td>
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<tr>
<td>4. Revise Farmalicious</td>
<td>Revise structure, move date</td>
<td>1</td>
<td>Lead</td>
<td>Q1 2017 – On-going</td>
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<tr>
<td>(see Ch. 9)</td>
<td>Shift focus to one-off dinners and experiences</td>
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<td>Develop criteria for participation</td>
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5. Enhance existing festivals, events (see Ch. 7)  
Increase market readiness  
Attract food tourists  
Create partnerships  
Increase local food procurement  
2  
Supporting  
2016 – On-going

6. Engage media (see Ch. 10)  
Increase promotion of market ready businesses and products  
2  
Lead  
Q2 2016 – On-going

3. FUNDAMENTAL PRODUCT DEVELOPMENT (see Chapter 10)

New experience development requires strong leadership to engage stakeholders, develop a sustainable business plan, and coordinate execution and promotion.

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</table>
| 1. Create In Real Life (IRL) tourism product (see Ch. 10) | Celebrate market ready businesses  
Create metrics to manage success  
Increase market readiness  
Show value to Taste Real partners  
Promote and market outside of the region  
Attract food tourists  
Create partnerships  
Create In Real Life landing page on Taste Real website | 2 | Lead | Q3 2016 – Q1 2017

RECOMMENDED TIMELINES FOR PRIORITIES

<table>
<thead>
<tr>
<th>IDENTIFIED OPPORTUNITIES</th>
<th>Q1 2016</th>
<th>Q2 2016</th>
<th>Q3 2016</th>
<th>Q4 2016 – Q1 2017</th>
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<tbody>
<tr>
<td>Expand Source It Here event</td>
<td>Priority 1</td>
<td><strong>RED</strong></td>
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<tr>
<td>Host Workshops</td>
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<td><strong>GREEN</strong></td>
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<tr>
<td>Provide Training and Resources</td>
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<td><strong>RED</strong></td>
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<tr>
<td>Enhance Taste Real Program</td>
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<td><strong>GREEN</strong></td>
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<td>Enhance Taste Real Rural Romps</td>
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<td></td>
<td><strong>RED</strong></td>
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<tr>
<td>Enhance Festivals and Events</td>
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<td><strong>RED</strong></td>
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<tr>
<td>Engage Media</td>
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<tr>
<td>Create Taste In Real Life (IRL) Tourism Product</td>
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CONCLUSION

Wellington County is well positioned to become a food tourism destination. The impressive scope and achievements of Taste Real and its partners over the last decade have created a strong foundation for food tourism success. The recommendations in this Strategy are intended to support, enhance and evolve the Taste Real brand and its existing products to become significant tourism drivers for the region. Taste Real has long been a respected and valued initiative within the community; the time has come for it to be shared and celebrated beyond its regional borders.

The creation of Taste Real *In Real Life* (IRL), a new tourism-focused product, will showcase the authentic stories and market ready culinary experiences available in Wellington County and promote these to a wider audience. The rural charm and agriculture available throughout Wellington County is a considerable strength as food tourists seek out opportunities to go “off the beaten path”, meet their food producers and make meaningful connections to the land. Increasing the promotion of these experiences will be crucial to attracting the savvy urban food tourist, who does extensive trip planning online and looks for recommendations from key influencers before selecting a destination. To ensure the experiences and products meet the expectations of the food tourist, criteria must be established.

Educating stakeholders, BIAs and Municipalities on the value of investing in food tourism is necessary to build support for new tourism products and ensure their sustainability. The recommendations identified in this Strategy are not intended to be the sole responsibility of Taste Real to execute. Continued partnership development and stakeholder engagement will be critical to ensuring the desired outcomes are achieved.