



# CULINARY TOURISM

*A Recipe for Economic Development Success*

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# Culinary Tourism

## DEFINITION

Culinary tourism includes 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.

## CULINARY TOURISM IN ONTARIO

Virtually any tourism experience is enriched by food and drink.

Developed properly, culinary tourism tells the story of the heritage, the people and the landscape of a geographic area. It reflects 'place', enriches experiences, and can be a valuable tool to boost economic, social and community development.

Culinary tourism is no longer a niche market. Its potential to motivate and attract travelers is ripe. All tourists eat, including the more than 42.3 million overnight visitors Ontario welcomed in 2008, of which 80.6 percent are domestic (to Canada) visitors (Travel Survey of Residents of Canada, 2008; and International Travel Survey, 2008).

According to the International Culinary Tourism Association (ICTA), the interest in food and drink is reflected in the growth of food media, the explosion of local food movements and the number of mainstream events now featuring local and regional cuisine - and this is certainly the case in Ontario.

In its 2010 - The State of the Culinary Tourism Industry Readiness Index, ICTA cites Ontario as one of three world-wide leaders in culinary tourism among the nine countries surveyed. Scotland and Louisiana were identified as the other two leaders.

The Province is characterized as a "hotspot" based on the level of culinary tourism activity in community, education, development and promotion.



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## ECONOMIC IMPACT

Culinary Tourism is a significant revenue generator and job creator. In 2010 for instance, the commercial and non-commercial foodservice sector in Ontario had forecast sales of \$22.5 billion and employed more than 404,000 individuals (Statistics Canada and CFRA).

According to Lori Stahlbrand, President of Local Food Plus (LFP), the economic impact of eating local food has a 3:1 impact on the local economy. And according to the President of the Wine Council of Ontario, Hillary Dawson, the impact of consuming Ontario wines is in excess of 12:1 in economic impact.

Research findings of the International Culinary Tourism Association underline just how vital this sector of the tourism industry is; Nearly 100 per cent of all tourists dine out when traveling and food and beverage as a category ranks first and foremost in visitor spending - even more than lodging.

Dining is consistently one of the top three favourite tourist activities. There is a high correlation between tourists who are interested in wine/cuisine and those interested in museums, shows, shopping, music and film festivals and outdoor recreation (Quantified Marketing Group 2010).

Based on a Ryerson University Study, the average culinary tourist spent double that of a generic tourist. The average culinary tourist was also found to spend triple of that of a generic tourist on fine-dining, seven times on wineries and 40% more on accommodation.

Overall, respondents who reported culinary offerings as a driving factor in their traveling considerations exceeded the average expenditure in each of the following categories: fine-dining, casual dining, lodging, entertainment, shopping, wineries and culinary product.

Clearly the positive economic impact of culinary tourism is far reaching within local communities and extends well beyond dining.



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# *Culinary Tourism*

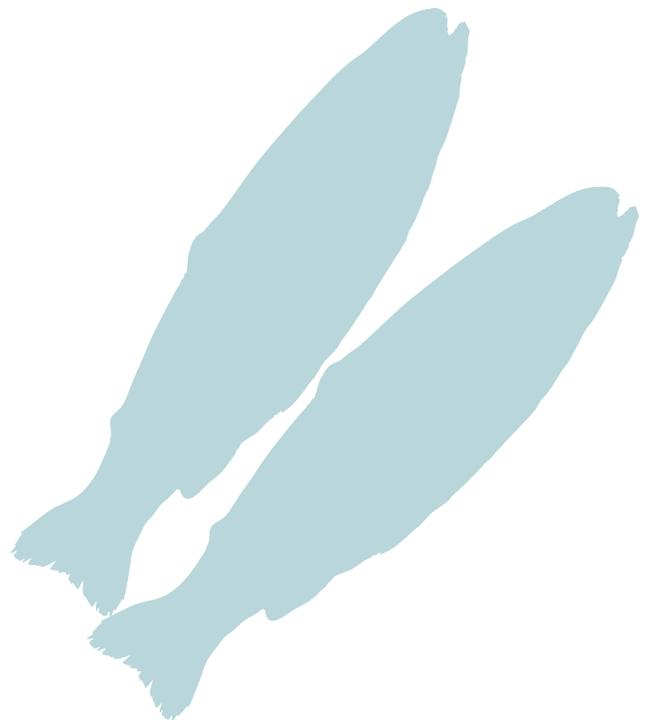
## **ONTARIO'S CULINARY TOURISTS**

OCTA's research over the past number of years indicates that there are three distinct segments of the culinary tourism market:

First: The market comprised of approximately 10 per cent of tourists who plan trips based on the food experience. They spend twice as much on their tourism experience overall as any other tourist (Richard Wade and Ryerson University Report 2004)

Second: 80 per cent of tourists who include a food experience into their overall itinerary. While food may not be the primary motivator attracting travelers to that destination, food is of growing importance to that overall experience. OCTA sees this market as having the greatest opportunity for culinary tourism product development.

Third: The 10 per cent of tourists who are travelling through and make an unplanned stop to eat. OCTA sees an opportunity to promote local culinary tourism experiences at some of these stop-over locations, e.g. to make information about local culinary tourism experiences available at service centres and Tourism Information Centres.



# Culinary Tourist Profiles

(FOR RESIDENTS OF ONTARIO OR VISITORS TO ONTARIO DESTINATIONS)

The Travel Activity and Motivation Study (TAMS) 2006 research provides further insight into culinary tourists in Ontario and underscores their value.

## THE TOP-TEN FOOD RELATED ACTIVITIES FOR CANADIANS WERE:

ACTIVITY	PARTICIPATION
Dining at restaurants featuring local foods	57%
Going to local cafes	40.9%
Dining at high-end restaurants	20.9%
Dining at restaurants with international reputations	19.9%
Shopping or browsing at gourmet/kitchen stores	11.5%
Day visits & tastings at wineries	7.0%
Attending food/drink festivals	6.9%
Dining at a farm	4.8%
Attending cooking or wine courses	4.4%

## INCOME

Culinary participants are more likely to be affluent than other Ontarians:

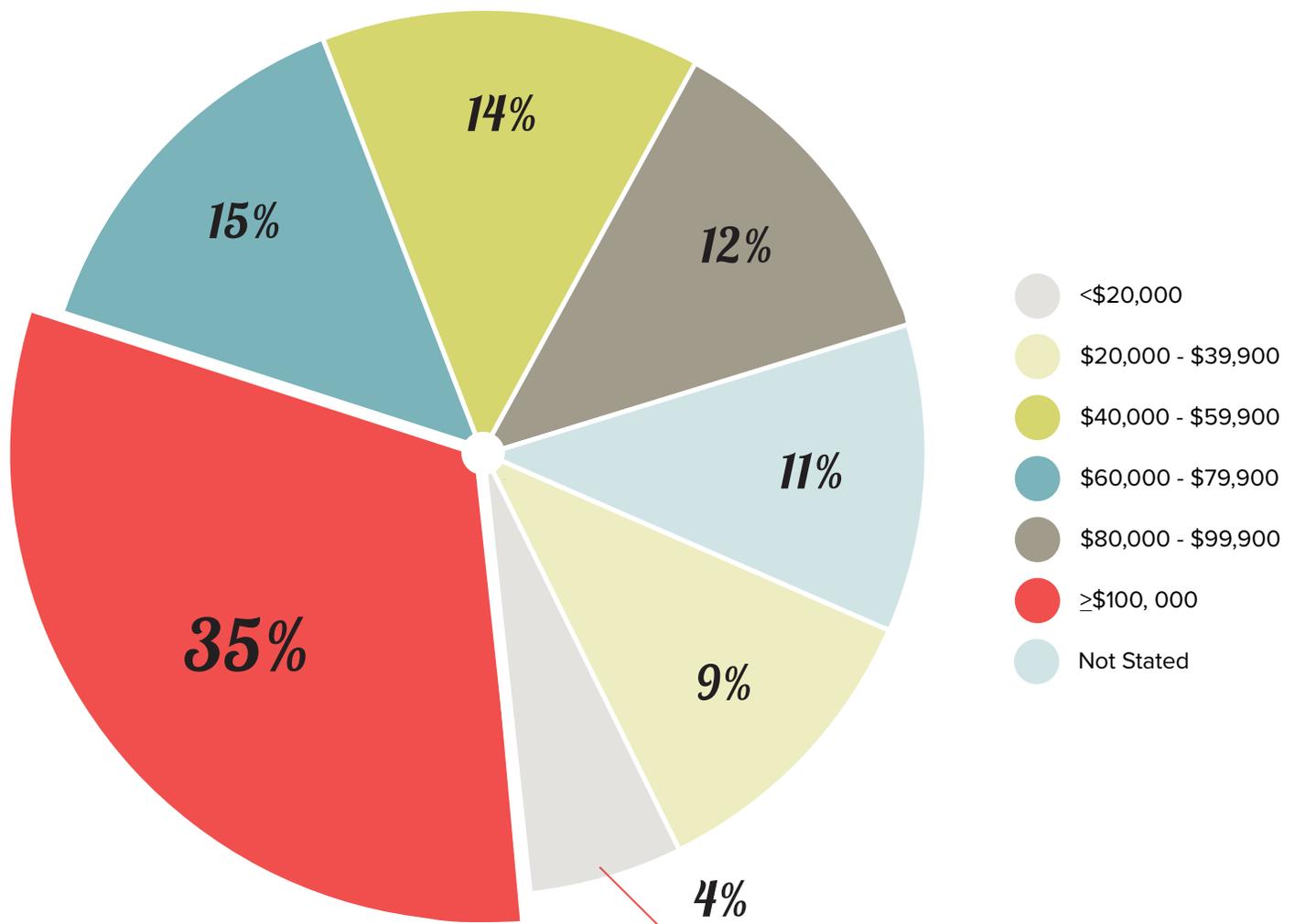
HOUSEHOLD INCOME	PARTICIPANT	NON-PARTICIPANT
<\$20,000	3.7%	7.8%
\$20,000 - \$39,900	9.0%	16.4%
\$40,000 - \$59,900	13.6%	16.5%
\$60,000 - \$79,900	14.9%	14.1%
\$80,000 - \$99,900	12.3%	12.0%
≥\$100,000	35.1%	17.6%
Not Stated	11.4%	15.5%

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## HOUSEHOLD INCOME BY PARTICIPANTS IN ANY CULINARY ACTIVITY:



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## PARTICIPATION IN OTHER ACTIVITIES

Culinary participants are more active than other Ontarians. The following are some examples of relative participation rates:

ACTIVITY	PARTICIPANT	NON-PARTICIPANT
Visiting historic sites	51.2%	19.4%
Swimming in lakes	47.9%	25.7%
Attending live theatre	32.3%	11.7%
Visiting gardens	25.4%	7.7%
Golfing	23.7%	11.7%
Going to a music festival	13.7%	3.9%
Going to a spa	18.1%	3.8%

## CULINARY PARTICIPANTS ARE UPBEAT AND INTERESTED IN MANY THINGS:

LIFE ATTITUDES	PARTICIPANT	NON-PARTICIPANT
Lots of energy for my age	41.7%	32.1%
Like to discover new places	32.6%	25.5%
Be physically active	29.8%	19.4%
Feel in control of my life	37.1%	32.5%
First buy new products	18.7%	12.5%
Makes decisions easily	42.1%	34.8%

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# Culinary Tourism

## A POWERFUL MOTIVATOR FOR U.S. TRAVELERS

The Ontario Travel Intentions Study, Summer 2011 edition calls out the importance of attracting US travelers to Ontario as well as the need to lay the groundwork in the US for generating future momentum. The report also states that “Americans must be encouraged to go beyond Ontario’s practical benefits as a potential destination” and there is a need to “attract curiosity and convert practical interest to emotive desire”.

This is the power of food, drink and the development of Culinary Tourism. By experiencing a country’s food a traveler is able to understand history and culture in a very rich and more emotive manner.

As noted by The International Culinary Tourism Association, “because food and drink involve all five of the human senses, we’ll remember a meal much longer than we will a museum or stained-glass windows.”

Culinary Tourism is a powerful motivator for travelers and continues to grow year over year.

The Travel Activities and Motivation Survey (TAM) conducted by the Ontario Ministry of Tourism reports that:

125.7 million Americans (71% of all American travelers) participated in at least one culinary activity while on an out of town trip in 2004 and 2005. It was also noted that pursuing such an activity was one of the most important travel activities they sought.

According to YBP&R/Yankelovich, Inc. 2007;

44% of leisure travelers (US) now feel that the opportunity to try different and unusual cuisines is a very/extremely desirable attribute of a vacation.

The Profile of Culinary Travelers, 2006 Edition, published by the Travel Industry of America underscores the desire to experience regional and local cuisine as a major reason for participating in Culinary Travel.

85% of Culinary Travelers enjoy learning about the local culture and cuisines.

66% of these travelers say they always want their travel to be experiential so they make an effort to try regional cuisines, culinary specialties and local wines and spirits.





# *Culinary Tourism*

## **A POWERFUL MOTIVATOR FOR U.S. TRAVELERS (CON'T)**

Culinary Travelers not only support local economies through dining out, visits to farmers markets, attendance of culinary events and festivals, but they also have a desire to take their experience home and share it with friends and family. The Travel Industry of America reports in their study;

70% of Culinary Travelers enjoy bringing back regional foods, recipes, wines etc. from places they have visited to share with family and friends.

This demonstrates the power of Culinary Tourism and its ability to create rich, memorable experiences that emotionally connect with travelers and elevate them from tourist to advocate.

