



*Culinary
Tourism*





Crunching the Numbers: The Value of Culinary Tourism



Every tourist has....



one thing in common





Whether 24 or 74, an adventurer or history buff...



Every tourist eats at least once a day, and more likely three times per day.





Eating is one of the few travel activities that engages..



senses

“Because food and drink involve all of the human senses, we’ll remember a meal much longer than we will a museum or stained glass windows.”

International Culinary Tourism Association



There were over 100 million visits to Ontario in 2010. If all visits included 3 meals that is 300 million opportunities to create memorable experiences and a unique taste of place that will be shared!



330,000,000



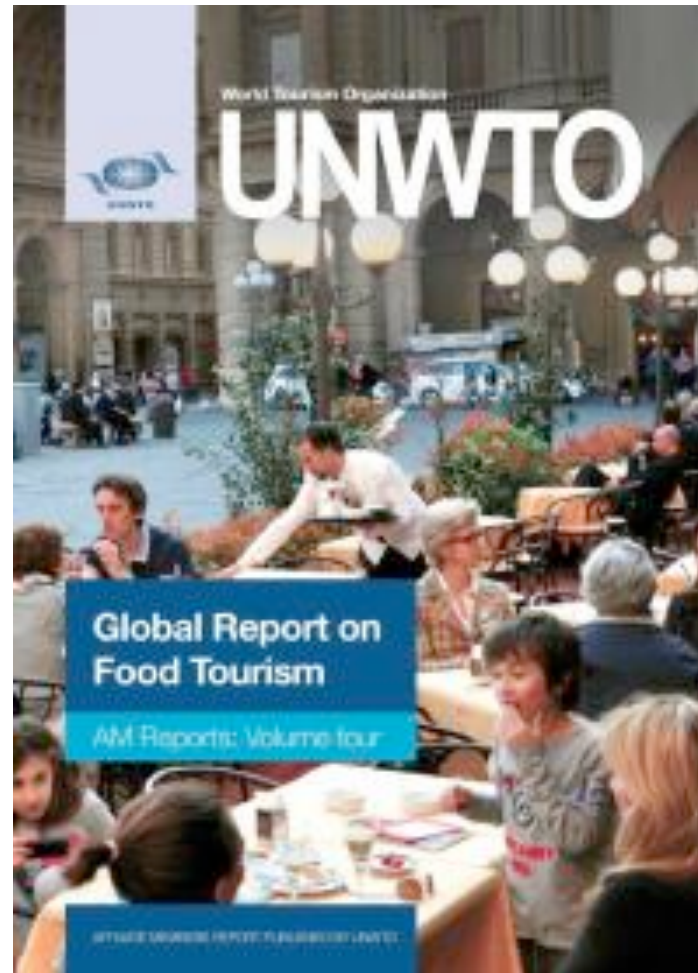
Culinary Tourism: Definition

- 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.





The United Nations World Tourism Organization has developed a Global Report on Food Tourism – underscoring the importance and opportunities related to culinary tourism.





“The growth of food tourism worldwide is an obvious fact. It is one of the most dynamic segments within the tourism market.”



SHOW ME THE MONEY



Culinary Tourism is a recipe for economic development success!



125.7 MILLION AMERICANS

(71% of all American travelers) participated in at least one culinary activity while on an out of town trip.

Pursuing such an activity was one of the most important travel activities they sought.

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



FASTEST GROWING REVENUE GENERATOR

Editor Bon Appetite Magazine





Las Vegas has recognized the power of culinary tourism as a primary travel motivator and has created a celebrity chef culture. It was identified as the #1 culinary tourism getaway on the Travel and Experience Channel .





Culinary Tourism: Economic Impact

- Eating local food has a 3:1 impact on local economy. (Local Food Plus)
- Consuming Ontario wines has a 12:1 impact. (Wine Council of Ontario)
- Average Culinary Tourist spends double that of a generic tourist.
- 40% more on accommodations. (Ryerson University Study)





Culinary Tourism: Economic Impact

- Food and beverage as a category ranks first and foremost in visitor spending - even more than lodging.
- Wine tourism expected to grow by 20% in Canadian market and 28% in US market by 2025.

Niagara Tourism Research, Travel Intentions Study Wave 11 (feb 09)

- 40% revenue growth in Ontario VQA wine industry.

Study of the Ontario Economic Impact of Ontario VQA Wines, Nov 2011





Culinary Tourists:

Who are they?





Culinary Tourists:

MORE AFFLUENT

HOUSEHOLD INCOME	PARTICIPANTS IN ANY CULINARY ACTIVITY %	PARTICIPANTS IN NO CULINARY ACTIVITY %
<\$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

Source: Tams Study 2006





Culinary Tourists:

ACTIVE PARTICIPANTS

ACTIVITY	PARTICIPANTS IN ANY CULINARY ACTIVITY %	PARTICIPANTS IN NO CULINARY ACTIVITY %
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

Source: Tams Study 2006





Culinary Tourists

“They are travelers seeking the authenticity of the places they visit through food.”





Make it Local

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

66% want to try regional cuisines, culinary specialties and local wines and spirits.

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



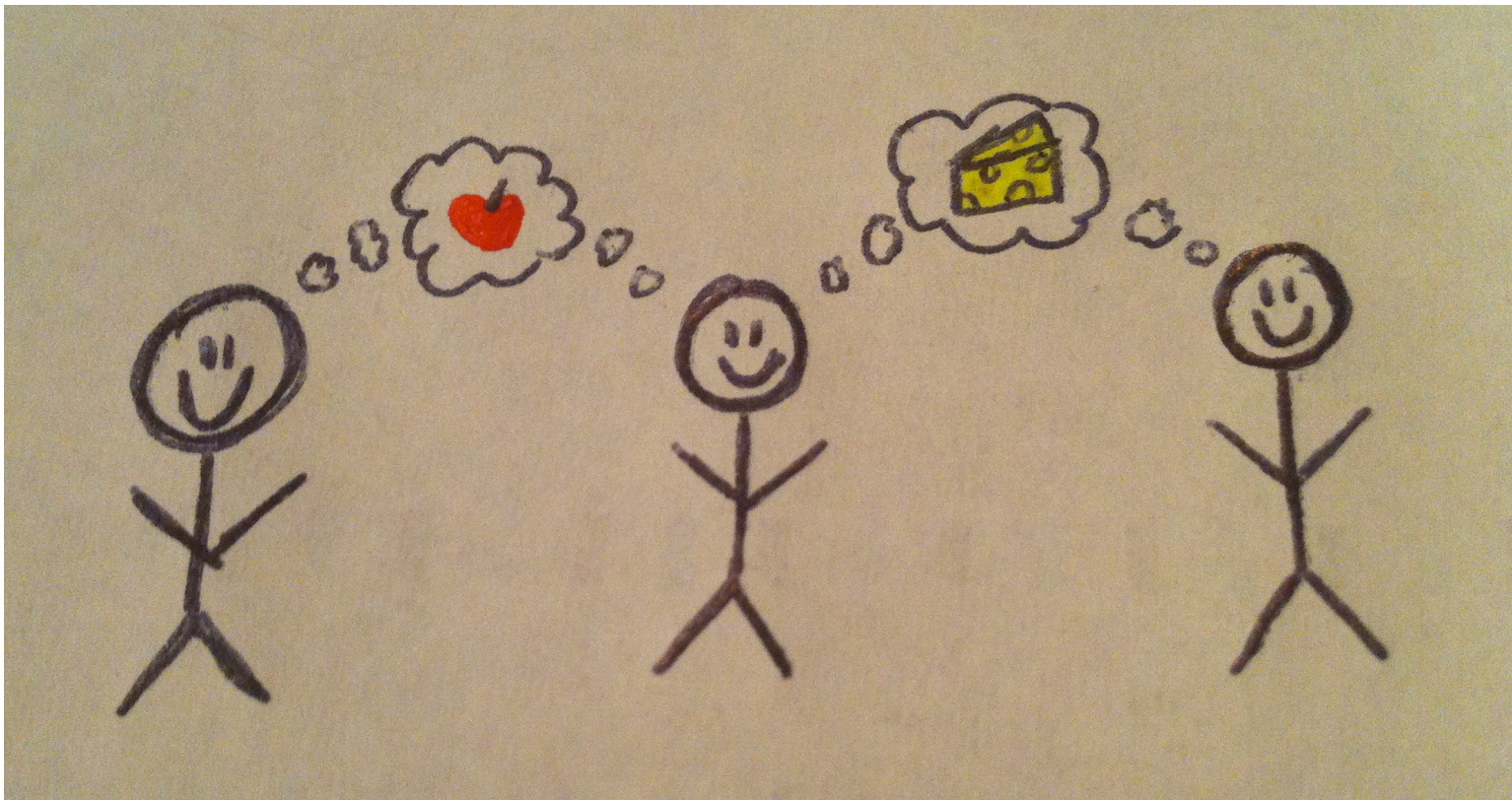


Culinary Tourists

- Concerned about origin of products.
- Means of socializing and exchanging experiences with others.
- Higher-than average expenditure.
- Demanding and appreciative.
- High level of loyalty.
- Revisit destinations due to gastronomy.



A food obsessed culture





Media plays a significant
role in creating a food culture.



“Our readers are food obsessed! They are planning their trips around their meals.”



**TRAVEL+
LEISURE**





"A growing taste for culinary travel"

"When you travel through the world exploring food, you get this interesting window about the culture and the environment because food is the bridge between the land and the culture."





Foodtripper
for people who travel to eat

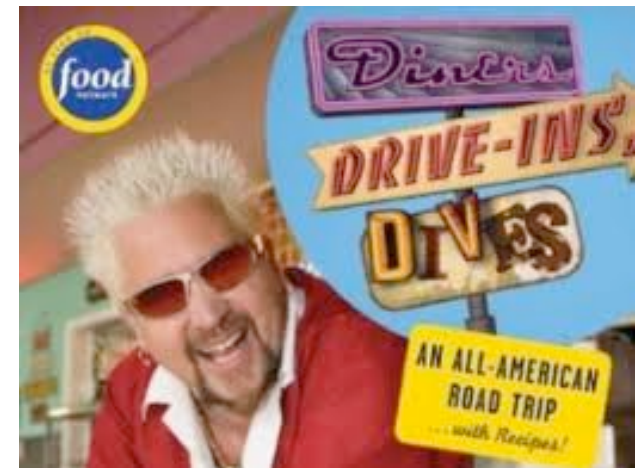
Just a few examples of the growing number of TV shows building on travel motivated by culinary experiences.





There's no better way to understand another culture than indulging in their food – that's the idea behind Have Fork Will Travel.

The classic All American Road Trip driven by the quest for authentic local taste experiences.



And now, our own Canadian version.





Chefs: the new celebrity.

Rock Star!



Jamie Oliver “playing” to sold out crowds at concert halls around the world - cooking and entertaining.



Digital and social media: The growing food scene where consumers research and share their food loving experiences.





Over 1 million downloads.

A hunger for food apps.
Eating and tweeting.
Instagram, Pinterest,
Facebook.



Alpha meals app – men photograph
and map their favourite 'manly' meals
around the world.





Hotel rewards and programs: Starwood Preferred Guest

“It’s worth noting that culinary tourism is one of the most robust areas of tourism growth and across all demographics.”

“Foodies are passionate and have the potential to be strong advocates of the Starwood brand.”





Credit card programs: Visa Infinity Dining Series



"We continually strive to offer Visa Infinite cardholders one-of-a-kind experiences that will both tempt and delight" Visa





Culinary Tourism Leadership

- ICTA identifies Ontario as one of three world-wide leaders in Culinary Tourism.

2010 The State of the Culinary Tourism Readiness Index

- Based on activity in community, education, development and promotion.
- Local and sustainable key drivers for Culinary Tourists globally.





“Food is the new culture capital of a destination, as if culture has moved out of the museum to become a living experience of consumption.”



“Over a third of tourist spending is devoted to food. The cuisine of the destination is an aspect of the utmost importance of the holiday experience.”





Is local food and drink working to boost your community's economy and attract high value culinary tourists?

For more information about developing culinary tourism strategies, products and experiences please contact us.

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