

Ontario Culinary Tourism Alliance + Skift Present:

The Rise of Food Tourism



Driven by today's intense social media activity around unique food experiences, destinations are developing local food-themed travel products and promotions to evolve their brand story.

Skift Team + The Ontario Culinary Tourism Alliance



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CULINARY TOURISM: A RECIPE FOR ECONOMIC DEVELOPMENT SUCCESS

AS THE CENTRE FOR CULINARY TOURISM EXCELLENCE, OCTA IS THE LEADING AUTHORITY ON DESTINATION DEVELOPMENT THROUGH FOOD AND AGRICULTURE.

OUR EXPERIENCE HAS PROVEN INVALUABLE IN ASSISTING BUSINESSES, ASSOCIATIONS, AND DESTINATIONS OF ALL SHAPES AND SIZES WITH CULINARY TOURISM DEVELOPMENT AND ECONOMIC GROWTH.

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About us

We believe the best way to experience culture is through food.

Food serves to connect us with the land, our heritage, and the people around us. It is a diverse and dynamic channel for sharing stories, forming relationships and building communities. By combining local food and drink with travel, food tourism offers both locals and tourists alike an authentic taste of place while contributing to a sustainable world economy.



We are actively contributing to Ontario's edible history by creating fruitful relationships in communities across the province – from the farm up. Though our roots are firmly planted in Ontario soil, our branches reach beyond borders, minimizing the distance between field and fork across the globe.

By bridging the gap between the food & travel industries, we are strengthening viticulture, agriculture and aquaculture to promote the growth of food tourism. Our work lies in developing strong relationships between growers, chefs, processors, restauranteurs, accommodation providers, distributors, government and industry organizations.

The Ontario Culinary Tourism Alliance is leading efforts in research, education, and product development to promote the growth of the tourism industry.

We believe discovery is a medium for growth, and inspires change. Whether you're a local or a tourist, edible experiences will change the way you think about your food, beyond the plate.

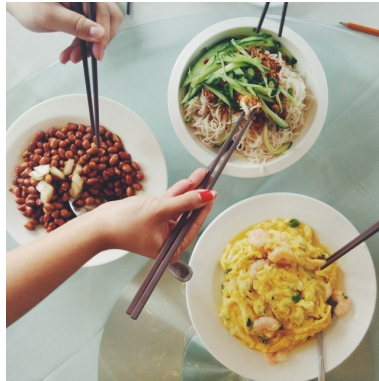
We believe in local. We believe in authentic.

We believe commitment and collaboration are the best avenues to success in this industry. Together, these fundamentals reinforce the economic, environmental and social health of our communities, globally.

Contact us to find how you and your business can take advantage of culinary tourism, globally.



Executive summary



Food tourism tells the story of a destination's history, culture and people. Over the last decade, destination marketing organizations (DMOs) have leveraged the rise of mainstream interest in food to open new consumer markets and drive business to a wider range of regional travel suppliers working in the food and beverage (F&B) sector.

According to the Ontario Culinary Tourism Alliance (OCTA), a non-profit organization that consults on F&B-themed tourism development worldwide, "Food tourism is any tourism experience in which one learns about, appreciates, and/or consumes food and drink that reflects the local, regional or national cuisine, heritage and culture."¹

While cuisine has always been an important part of most travel experiences, the concept of traveling to a destination specifically for its F&B product is a relatively recent mainstream consumer trend. The 2013 "American Culinary Traveler Report," published by Mandala Research, showed that the percentage of U.S. leisure travelers who travel to learn about and enjoy unique dining experiences grew from 40% to 51% between 2006 and 2013.²

In response, DMOs are creating major promotional campaigns and events revolving specifically around their food and beverage experiences, designed with multiple storylines targeting different market segments.

This is big business. In 2012, it was estimated that tourism expenditures on food services in the U.S. topped \$201 billion, nearly a quarter of all travel income. That makes food service the highest category of travel

Sources:

Andrews' Scenic Acres, Milton, ON, Courtesy of Ontario Culinary Tourism Alliance

Dayali, Beijing Roast Duck, Toronto, ON, Courtesy of Ontario Culinary Tourism Alliance

Vicki's Veggies Hurrah Heirloom Tomato Tasting, Milford ON, Courtesy of Ontario Culinary Tourism Alliance

spend, according to the University of Florida report: “A Flash of Culinary Tourism.”

The report estimates that 39 million U.S. leisure travelers choose a destination based on the availability of culinary activities, while another 35 million seek out culinary activities after a destination is decided upon.³

Preferences revolving around food can also have an adverse impact on tourists’ decisions to travel to certain destinations. Travelers’ who prefer the comforts of familiar cuisine might be hesitant to travel to a destination where it is difficult to find a “home-likeness” of food options.

In the report, “An Analysis of the Travel Motivation of Tourists From the People’s Republic of China,” it reads: “Preferences in food are especially important to Asian people. The food factor is likely to hold Chinese tourists in their own country or at least have them remain in Asia rather than draw them to Europe.”⁴

This is driving destinations and hotels to introduce services that cater to this emerging market. For example, New York’s Hotel Plaza Athénée introduced services geared toward China’s rapidly growing numbers of outbound travelers including in-room tea kettles, Chinese breakfast items, and Chinese-language newspapers.⁵ Los Angeles Tourism & Convention Board hosted a meeting with 75 industry executives to discuss Chinese culture. As a result, the Sheraton Gateway in Los Angeles expanded its breakfast menu to include steamed rice and congee and tea and soy milk.⁶

Every traveler today has the ability to digitally share their culinary experiences with friends and strangers around the world, fueling a veritable social media arms race to determine who has the most unique F&B experiences. This report examines how destinations and other travel suppliers are developing new strategies, special events, supplier networks and marketing campaigns to capitalize on the global foodie fervor, and the impact of those initiatives on local communities.

Introduction

According to the 2010 World Food Travel Association (WFTA) report, "The State of the Culinary Tourism Industry," the growing interest in F&B-themed travel is driven by a number of factors. These include the explosion of food-focused media and social media, an farm-to-table movement among large travel brands, and the introduction of high-profile events celebrating local cuisine.⁷

The Mandala Research firm, publisher of the 2013 "American Culinary Traveler Report," says leisure travelers, defined as someone who has booked at least one vacation in the previous 12 months, represent 71% of the U.S. adult population, or around 170 million Americans. Mandala reports that 77% of those leisure travelers can be classified as culinary travelers, having participated in culinary travel activities such as dining out for a unique or memorable experience, taking cooking classes, or attending food festivals.

The most interesting data point in that study shows the growth of culinary tourists traveling specifically for the purpose of engaging in destination-specific culinary experiences. The report reads: "About half of all leisure travelers travel to learn about or enjoy unique and memorable eating and drinking experiences (51%), a notable gain from 2006 (when 40% said they traveled for these reasons)."⁸

Another report by the American Journal of Tourism Management released in 2013, "A Study of Factors Influencing Food Tourism Branding" suggests that the growth of food tourism "is seen as an outcome of a trend where people spend much less time cooking, but choose to pursue their interest in food as part of a leisure experience." Increasingly, going out for a meal with friends is as much about the social interaction as it is the food and the ambiance it is served in.⁹

Driving these travel trends immeasurably, culinary tourists share millions of F&B-themed photos daily across social platforms like Twitter, Facebook, Instagram and especially Flickr. This increases travel consumers' awareness of different cuisines and cultures, and it fuels their desire to experience them.

In the study “A Flash of Culinary Tourism: Understanding the Influences of Online Food Photography on People’s Travel Planning Process on Flickr” by Bingjie Liu, William C. Norman and Lori Pennington-Gray, 169 Flickr members participated in an online survey and responded to questions about how food plays a role in their decision making. As seen below, the results overwhelmingly proved that food was an important factor in travel and discovering new destinations.³

THE ROLE OF FOOD AND FOOD PICTURES IN THE TRAVEL PLANNING PROCESS

ITEM	TOTAL % AGREED OR STRONGLY AGREED
I like to first decide the vacation destination and then look for local food and restaurants	73.8%
I like to go to new places to try some new food and take pictures of them.	62.7%
Pictures of food motivate me to go to a new place.	54.1%
If I know of new places through food pictures, I will go there and try the food.	46.9%
I look at food pictures when planning a trip (recoded).	46.8%
I like to look up some information on some new food and then choose a destination where I can find the food.	26.2%

“Postmodernists have portrayed food as embodied material culture and suggested that our social and cultural identities can be expressed via food,” reads the same 2013 University of Florida white paper. Moreover, “consumer-generated media not only reflects individuals’ personal interests but also exerts a dramatic impact on other people who access this information.”³ As Instagram feeds are flooded with photos of food, they turn any user’s followers into a new market for that restaurant or destination.

Much of the food and drink content in the early days of social media quickly expanded to find new homes on culinary-themed websites. In July 1997, Jim Leff and Bob Okumura founded Chowhound, an online discussion forum about food. There are now hundreds of thousands of similar sites in every language, produced by both expert and amateur food lovers.

A BRIEF FOOD BLOG TIMELINE

DATE LAUNCHED	SITE	
7/2/97	Chowhound	A forum discussing food in New York.
8/25/02	The Julie/Julia Project	A blog by Julie Powell narrating her trials of recreating the recipes in Julia Child's book, <i>Mastering the Art of French Cooking</i> .
10/13/03	Slice (formerly Slice NY)	The first niche blog devoted to a New York City favorite, pizza.
7/21/05	Eater (formerly Eater NY)	A focus on celebrity chef culture and tales of the restaurant industry.
2/14/06	The New York Times' Diner's Journal	A blog for the Times' food critic launches and grows interest in food media.
6/30/06	Smitten Kitchen	Deb Perelman's original blog adapts classic recipes and gains a strong following.
12/1/06	Serious Eats	Food critic and author Ed Levine creates a home for curated recipes from chefs, writers and the community as well as a forum and advice section.
1/1/10	Foodspotting	A social sharing site for food pictures.

Source: <http://www.saveur.com/article/Kitchen/A-Brief-Food-Blog-Timeline>

As new food blogs and websites are being created and expanding to cover more regions, print publications are also doubling down on their online presence. *Lucky Peach*, a creative quarterly journal that focuses on a specific theme in each issue, recently upgraded from a simple Tumblr page to a website filled with recipes, photography, videos and story content previously featured in print. *Bon Appétit*, a magazine that has been in circulation since 1956, also has a website brimming with daily video and recipe updates, kitchen advice, and trending topics.

The development of food tourism by DMOs channels all of this robust online consumer engagement toward the food and beverage experiences specific to a particular destination. Best practice DMOs are successfully integrating user-generated social media content into their promotional campaigns, while at the same time developing their own sophisticated content platforms in cooperation with local food tourism suppliers.

An effective food tourism development strategy covers a broad selection of travel activities including: food, wine and beer festivals; tours of farms and artisanal production facilities; immersive food tours of varying depth; myriad types of cooking classes and wine tastings; accommodations with F&B offerings; farm-to-table restaurant dining and educational events; and the always popular farmers' markets. Agritourism, where travelers visit working farms, is also a

growing opportunity.

Consulting on food-themed tourism development worldwide, the Ontario Culinary Tourism Alliance (OCTA) suggests the following ten criteria for developing successful food tourism destinations and ensuring a compelling local “taste of place” is offered.¹⁰

The criteria are:

1. Leadership
2. Market-ready or near-market-ready culinary products and resources
3. An integrated strategy
4. Partnership and community-based collaboration
5. Financial support and performance measures
6. Destinations with good access from key origin markets
7. Sufficient market intelligence
8. Food tourism resources distinctive to the region
9. A critical mass of agri- and/or food tourism experiences
10. An effective Destination Marketing Organization

“The challenge that many destinations and event organizations have in terms of developing authentic culinary experiences for travelers is the ability to ensure that suppliers of those experiences are executing something that’s authentic,” says Rebecca LeHeup, Executive Director of OCTA. “And that they’re doing it in a way that truly does support their local growers and producers, as well as educate the consumers about them.”

In this report, we’ll dive into the evolution of food tourism in destinations and their events, share how DMOs are engaging their stakeholders to develop local food communities, and identify best practices for developing food tourism products.

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About Skift

Skift is a travel intelligence company that offers news, data, and services to professionals in travel and professional travelers, to help them make smart decisions about travel.

Skift is the business of travel.

How to Capture the Attention of Food Tourists

OCTA organizes food tourists into three categories: People who deliberately plan their trips around food; those who incorporate a food experience into their itinerary without it being the primary motivator; and those who decide where to dine on the fly.

Likewise, the United Nations World Tourism Organization's (UNWTO) 2012 "Global Report on Food Tourism" identifies culinary-conscious tourists by the following behaviors:

1. they are concerned about the origin of products
2. use dining as a means of socializing and exchanging experiences with others
3. have a higher-than-average spend on trips
4. a high degree of loyalty
5. revisit destinations due to gastronomy.

In the UNWTO study, 88% of respondents indicated that culinary offerings were an important component for defining a destination's brand and image.¹¹

Understanding these consumer psychographics and spending behaviors is important for DMO's, because as mentioned in the WFTA and UNWTO reports, travelers who report culinary-themed travel experiences as a driving factor in trip planning exceed the average spend not just on fine and casual dining, but also lodging, entertainment, shopping, and other general travel experiences.

A study of culinary tourists in the Extremadura region of Spain, published in *Wine Economics & Policy*, established a strong link between interest in culinary activities and interest in exploring a region's cultural tourism attractions. A survey of 303 visitors during the spring of 2012 found that food tourism has great potential as both a tourism product differentiator and a tool for marketing the unique aspects of tourist destinations in general.¹²

Likewise, the 2006 Travel Activities & Motivations Survey commissioned by Statistics Canada revealed a higher interest in cultural, outdoor and historical activities by food tourists when compared to their generic tourist counterparts. This suggests that a food tourist is also a cultural tourist, and vice versa – making their potential economic impact even greater for the destination they choose to visit.

In a market study conducted by Brand USA for the countries, Australia, Canada, Brazil, China, France, Germany, Japan, Korea and the United Kingdom, results proved that food and dining played a big factor in the tourist's travel experience.¹³

IMPORTANCE OF DINING AND CUISINE BY MARKET

	% RANKING IT AS A "MOST IMPORTANT TRAVEL EXPERIENCE"	% NOTING IT'S AN "IMPORTANT DESTINATION CHARACTERISTIC"	% SPENT ENJOYING WINE & FOOD ON LAST TRIP TO USA
Australia	39%	57%	NA
Brazil	42%	NA	52%
Canada	31%	55%	40%
China	55%	84%	66%
France	38%	44%	38%
Germany	30%*	47%	35%
Japan	42%	55%	61%
Korea	25%	55%	55%
UK	34%	59%	41%

* 67% note cuisine important if part of "local culture."

Source: <http://www.milespartnership.com/blog/will-travel-for-food-culinary-tourism>

The growing interest in experiencing local food activities also aligns with the burgeoning sharing economy. Travelers are looking to their peers for recommendations about specific local experiences, especially those themed around F&B, or they're engaging with locals through a wave of new sharing apps and websites. For example, the startup EatWith connects local hosts and travelers to enjoy a homemade dinner.¹⁴

Airbnb, meanwhile, recognizes exceptional hosts with its SuperHost program. Providing guests with a map or guide to local restaurants and farmers' markets is one of the most common expectations required of a SuperHost.



How Destinations Develop Food Tourism

At the destination level, primary food capitals like San Francisco and Paris have always been known for their excellent selection of dining experiences, from five-star restaurants to back-alley cafes. More recently, lesser-known food destinations are emerging and discovering that celebrating their local cuisine can help attract more visitor arrivals. Even more encouraging, these emerging destinations are finding out they don't need Michelin starred chefs to be successful.

"The average consumer is becoming more savvy in terms of their expectations from their travels and the ways that they can immerse themselves in a destination," says LeHeup. "They really want to feel that they're taking away a true authentic experience of a place. One of the key ways to do that is through the food culture of a destination, but it's not only about eating. It's also about the opportunity to learn about the local food culture and food history. It's about being connected to local growers and producers and dining at restaurants that have chefs who support those local flavors and local food cultures."

Destinations looking to build their food tourism offerings can do so in a number of ways. First, DMO's must clearly communicate a destination's food tourism objectives to local stakeholders and bring them onboard as active participants in the overall strategy.

It is not enough to simply find the unique regional F&B assets to tell the destination's food story. Successful food tourism development is successful when it delivers a fully integrated travel experience for today's sophisticated travel foodies.

To help determine the "market readiness" of a business or experience through the lens of food tourism, OCTA developed the Experience Assessment Tool (EAT™) in 2012. The proprietary software assesses tourism-related businesses and the destination as a whole based on a specific set of standardized qualifications.

The most obvious place for DMO's to start to develop their food tourism strategy is with the actual growers and producers in the destination. From farmers to brewers to chefs, these local influencers can provide specific insight into authentic regional F&B experiences. Once a destination has engaged these stakeholders, it can then begin to build out the variety of experiences by working with businesses along the food tourism value chain (restaurants, attractions and tour operators).

The following case studies highlight DMO's that have successfully created a culinary brand. We looked at three diverse destinations—Ireland, South Australia and Nashville—for insights into best practices for product development and marketing.

Sources:

Niagara Cherries, Courtesy of Ontario Culinary Tourism Alliance

St. Jacobs Farmers' Market, St. Jacobs, ON, Courtesy of Ontario Culinary Tourism Alliance

Butter tarts, Peterborough, ON, Courtesy of Ontario Culinary Tourism Alliance



Source: Carlingford Oyster Festival, Courtesy of visitcarlingford.com

Case Study #1: Developing Products in Ireland

As Ireland's national DMO, Fáilte Ireland initiated its food tourism strategy by identifying on-the-ground travel products that gave visitors the opportunity to interact with Ireland's local cuisine and its producers. Then the organization developed a set of standards called the National Quality Assurance Framework, which vetted tourism suppliers and labeled their products to assure credibility.

Following that, Fáilte Ireland launched the "Discover Ireland" marketing campaign to spread awareness of the country's culinary roots and new products. The DMO provided visitors with an endless array of compelling reasons to visit the country, including new food-themed events and activities like the Sheridan's Irish Food Festival, Ballymaloe Literary Festival, the Irish Whiskey Trail, and the TASTE of Kilkenny Food Trail.

From the outset, Fáilte Ireland actively encouraged business owners and destinations to showcase their culinary expertise and provided the B2B tools to help them do so. For example, the DMO's website outlines the process of developing a food trail in step by step detail.

It reads: "In order for it to be successful, a food trail must deliver for both the visitor and the stakeholders. For the visitor it must offer unique food experiences that are

enticing and distinctive enough to motivate them to travel. For the stakeholders, success could be measured by increased business and more profitable and sustainable businesses."

The Burren Food Trail, developed in part through consultations with OCTA, is an example of a food trail done right. The network features 25 members, each of whom have signed a Burren Food Trail Customer Promise and are collectively bound by their commitment to building a sustainable future for the region. Trail visitors are encouraged to attend "Burren Food Trail Mondays" to participate in special events offered by members between April to October. Past experiences have ranged from afternoon tea in locals' homes to kayaking trips with a gourmet picnic.

Fáilte Ireland also actively encourages local communities and individuals to become involved in promotional efforts by awarding communities that excel at marketing initiatives. In partnership with The Restaurants Association of Ireland and Admailer.ie, the organization promotes the annual "Ireland's Top Foodie Town" competition. The award is given to towns and communities that best share their culinary experiences and why their local food community is unique.

Ireland is a great example of an emerging culinary destination because it is not necessarily top of mind for culinary tourists. Following up on its efforts, the DMO conducted



Source: Tasting Australia, Courtesy of <http://www.tastingaustralia.com.au/>

a study of 1,514 visitors to Ireland in 2013. The results showed that 39% of overseas travelers agreed that their trip exceeded their expectations, with quality of food listed as one of the top factors.

Case Study #2: Focusing on Authenticity in South Australia

One of Australia's most popular tourist destinations is the state of South Australia, home to Adelaide and Barossa Valley wine country. In terms of food tourism, Yarra Valley is equal in scope to other New World wine destinations like Napa, Cape Town and Mendoza.

The South Australian Tourism Commission (SATC) is actively developing programming around food and wine to build its food tourism branding. The official "Tasting Australia" festival highlights local food and wine producers during more than 80 free and ticketed events over the course of eight days. Individual events include farmland feasts, food and wine master classes, producer picnics, and other activities as unique as a nine-course mushroom tasting in a limestone cave. Most importantly, attendees have the opportunity to interact with hospitality professionals, renowned chefs, and local food and wine personalities.

Following the 2014 event, South Australia Tourism Minister Leon Bignell said, "This has been a week to celebrate what our state does well all year round, serving up delicious food

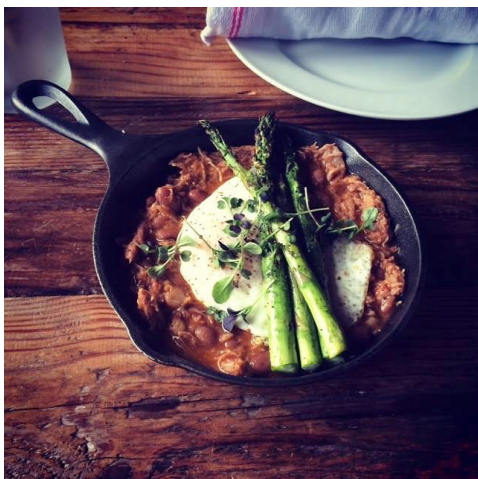
and world-class wine, beer and spirits, while also showcasing experiences and destinations related to our produce. Research shows people travel annually for food and wine events, and we aim to capitalize further on this."

Tasting Australia was also the first culinary festival in the country to host a bloggers conference during a food-themed event in an effort to gain low-cost international exposure of the state's culinary offerings.

Other events in South Australia work to pair local cuisine with one-of-a-kind settings. The Kangaroo Island Seafood Festival organizes tasting menus, campfire cooking experiences, and all-day seafood barbecues along the seashore, often with participation from celebrity Australian chefs.

OCTA asserts that when building a food tourism brand, businesses within the region should be encouraged to introduce their own hyper-local products and events, ideally in a way that will feed into and complement the tourism board's promotional efforts; SATC does this exceptionally well. For example, Kangaroo Island's Southern Ocean Lodge hosts culinary events throughout the year for its guests. Tour operators including Life is a Cabernet, A Taste of South Australia, and Exceptional Kangaroo Island curate their own food and wine experiences throughout the year.

Video has been another integral tool in South Australia's marketing strategy. The



DMO's "Through Local Eyes" project features more than 30 films produced by local filmmakers. One short video, "About Food" features the region's most talented chefs, producers and winemakers who tell the story of South Australian culinary culture. The videos have received over 61,000 views since launching in September.

"The film isn't polished or scripted," says Phil Sandford, brand manager of SATC. "It's a really honest, gritty, authentic view into what makes South Australia's food and wine scene so amazing."

South Australia's food tourism development is further supported by the national DMO's effort to market Australia's F&B experiences. Tourism Australia launched an \$8.6 million advertising campaign called "Restaurant Australia" in May 2014, based on data that showed Australia was viewed as a destination with good food and wine.

Social media played a huge role in the campaign. At the culmination of the promotion, the #restaurantaustralia hashtag reached 21,441 impressions on Instagram and 28,155 on Twitter, according to Totem.co and Tweet Archivist. The specific campaign has helped boost Tourism Australia's overall social following to the top of the SkiftIQ Destinations leaderboard with 196,045 Twitter follows, 6,357,143 Facebook "Likes," 21,492,945 YouTube video views, and 1,102,203 Instagram followers.¹⁵

The DMO's efforts are paying off; in the Tourism Australia Consumer Demand Project of 2013, Australia moved from 10th to third place behind France and Italy as top international destinations to visit for culinary travel.

Sources:
 Holland House Bar & Refuge, Courtesy of <http://nashvilleoriginals.com/>
 Urban Grub shrimp & grits, Courtesy of <http://nashvilleoriginals.com/>

FOOD AND WINE RANKS VERY HIGH AMONGST PREVIOUS VISITORS TO AUSTRALIA

NOT VISITED AUSTRALIA		VISITED AUSTRALIA	
France	54%	France	62%
Italy	53%	Italy	57%
Japan	31%	Australia	53%
Thailand	29%	Japan	42%
Hong Kong	28%	Hong Kong	42%
Spain	27%	Thailand	34%
Germany	26%	Spain	33%
Mexico	23%	Germany	30%
USA	23%	USA	30%
Australia	23%	Taiwan	25%

Source: Tourism 2020, Tourism Australia

Case Study #3: Mastering Partnerships in Nashville

Marketing and branding play important roles in raising awareness about Nashville's culinary culture, which has always been overshadowed by its music industry. Key to this development has been a partnership with *Bon Appétit*. The collaboration began with a music promotion including custom Spotify playlists curated by Nashville's top chefs.

There were several synchronicities between the media brand and the destination. *Bon Appétit* named Nashville the "coolest, tastiest city in the South," and the trailer for the amazing Nashville music scene docu-

mentary, "For the Love of Music, the Story of Nashville," appeared on the magazine's homepage. The city also hosted one of the magazine's popular Grub Crawls, which turned out to be one of the fastest selling events they had ever organized.

New urban development was also integral to spreading awareness of Nashville's culinary offerings. The city's new Music City Center convention facility attracts 350,000 convention visitors to Nashville each year, providing an instant customer base and compelling reasons for aspiring restaurateurs to open in the downtown core.

As the Nashville Convention & Visitors Corporation started focusing on its homegrown culinary assets, it reached out to every kind of individual and business involved in the F&B industry.

"We are reliant on the creative process of the restaurants," explains Butch Spyridon, president/CEO of Nashville Convention & Visitors Corporation. "One of the great strengths of Nashville overall, including the chefs, farmers, brewers, and distillers, is their willingness to collaborate, support and leverage each other. It speaks to everything we do in Nashville,"

Realizing how Nashville was suddenly entering the mainstream tourism market over the last decade, independent restaurant owners began working together to create the Nashville Originals restaurant association to collectively promote the local dining scene. Then the restaurants reached out to

the local music industry to develop new event marketing partnerships. The DMO saw these budding synergies between food and music so they jumped in to help spread awareness to expand the Nashville brand into new markets nationwide.

"The thing that makes us different is the music you get with the culinary experience," Spyridon told the *Nashville Business Journal* in late 2014. "If we try to go heads up with New York, San Francisco, Chicago, I think we can hold on, but it's far more believable and sellable with music. We don't want to leave our brand."

The culmination of the food and music industries' collaborative efforts resulted in the development of the Music City Food + Wine Festival. Formerly known as Music City Eats, the annual two-day event is produced in part by Grammy award winning artists Kings of Leon and celebrity chef Jonathan Waxman.

Consumer interest in Nashville's fine dining restaurants increased significantly between 2012 and 2014. According to a survey of 1,143 people who had not visited Nashville in five years, a third were most interested in enjoying the city's restaurants compared to 25% of potential visitors who felt that way in 2012. Nashville's restaurants also jumped from the fourth to the number one most popular travel experience, surpassing the Country Music Hall of Fame and Grand Ole Opry.

The Rise of Interdisciplinary Culinary & Cultural Events



One of the strongest indicators supporting the rise of food tourism is the growing number of local culinary programming being introduced at music and arts festivals. These events showcase a wide range of interdisciplinary creative energy, including modern works of art, electronic music DJs, books, speakers from the startup world, comic books and other collector items, and every kind of pop culture movement.

There are a number of opportunities for local food tourism suppliers to access the large customer bases attracted to these events. One of the most popular approaches has been the introduction of food trucks, which provide a trendy selection of local flavors for every craving. Destinations are also partnering with celebrated native chefs working in pop-up restaurants and other unique dining venues. Farmers' markets are popping up at festivals too. The Greenbelt Harvest Picnic, for example, is a massive outdoor concert held each year just outside Hamilton, Ontario, that includes a sprawling farmers' market and a concert series stocked with big name performers.

"Many festivals and events worldwide are demand generators for tourists, whether

they are food-driven festivals or festivals that happen to have great food programs within a broader subject," says LeHeup. "We're exploring how many of these festivals and events are actually using local food, or showcasing a taste of place, as a way to add value to consumers."

As one example, LeHeup says people don't think about Mardi Gras as a food festival. People go to Mardi Gras because they love the music and the cultural expression of New Orleans, but at the same time, local food is an integral part of the event.

DMOs have taken note of the growth of festivals and the role that food can play in them. Today, many destinations are collaborating with local businesses to develop events focused primarily on their culinary offerings.

For example:

- The San Francisco Street Food Festival is presented by Whole Foods Market and hosted by non-profit La Cocina. The event combines food trucks, pop-up restaurant, and Michelin-rated chefs throughout the city.
- The three-day Southern Living Taste of Charleston festival is hosted by the Greater

Source:

The Stop Night Market,
Toronto, ON, Courtesy of
Ontario Culinary Tourism
Alliance



Charleston Restaurant Association. It features chef competitions, restaurant promotions, sampling stations, beer tastings and musical performances.

- Smorgasburg is a twice-weekly seasonal event in New York City, featuring 75 to 100 vendors from the city and across the region. Vendors must sell a unique product that is not available at any other stall or market within the city.
- The Field Trip festival in Toronto features food from some of the city's top restaurants, alongside music and interactive performances that combine art, photography, technology and fashion.

Event Case Study #1: The Stop Night Market, Toronto

There are several paths that destinations and event managers can take when developing culinary-themed events. Deciding which concept to develop often depends on the type of customer that the organization wants to attract. According to Lianne Holland and Cara Goodman, fundraising coordinators for The Stop Night Market festival in Toronto, food trucks appeal to a younger demographic, farm-to-table meals attract a mixed audience, and gala events pull in business leaders and young professionals.

In 2014, The Stop's Night Market featured 65 chefs and sold out within one hour. By the end of the event, 2,400 attendees had helped raise \$80,000 for The Stop Community Food Centre's anti-hunger and anti-poverty programs.

The Stop Night Market organizers work with chefs that support the local farming community by sourcing meats and products in the

local area. Working with local businesses and influencers that hold similar culinary values increases the synchronicity among everyone and builds a stronger brand for the event. To bring in a cultural component, the organizers work closely with Toronto designers who are invited to create one-of-a-kind food carts for each of the restaurants. Attendees are then encouraged to vote on their favorite carts and awards are given out following the event.

Event Case Study #2: Art Basel in Switzerland, Miami & Hong Kong

Art Basel is the world's premier international art show with sister festivals held annually in Basel, Miami and Hong Kong. Although the artwork is global in scope, each show is defined by its host city and produced in collaboration with local institutions.

In 2013, Art Basel in Miami partnered with local James Beard Award-winning chef Michelle Bernstein. Her catering company helped develop a pop-up restaurant within Miami Beach Botanical Gardens that featured a four-course experimental menu for 100 guests each night.

"To have the opportunity to showcase Miami's culinary flavors to such a discerning and intellectual audience that frequents Art Basel in Miami Beach is a great pleasure," says Bernstein. "I hope, if even for just five days, that I can give these guests the true Miami experience, make our city proud, and represent the hard work that our community has put forth to make Miami a dining and arts destination."

The event does an exceptional job integrating artists and the local food scene with

Sources:

Pastrami sandwich from Wise Sons Deli, Courtesy of Flickr user, thetablehopper

Ramen Burger from Smorgasburg, Courtesy of Flickr user, Dan Nguyen

Babi & Co., Toronto Underground Market, Courtesy of Field Trip Music & Arts Facebook Page



Source: Michy's Miami Beach Pop up, Courtesy of Chef Michelle Bernstein's Facebook page

interactive installations set up inside some of the area's bars. In 2014, the Nova Bar featured the exhibit 'Dancarchy Refuge' by artist Naomi Fisher. Visitors escaped from the crowds by strolling through a path lined with large green plants leading to a room with colorful tie-dyed paintings where ballerinas performed a short routine.

Event Case Study #3: Life is Beautiful, Las Vegas

Life is Beautiful was an instantly successful three-day festival held in Downtown Las Vegas when it launched in 2013. The lifestyle event combining music, food, public speakers and art attracted more than 60,000 attendees that year.

Eve Cohen, the festival's managing director, previously produced the New York City Food & Wine Festival before joining the Life is Beautiful team. She says she wanted to build on her experience with traditional food and wine festivals by adding great music. She enlisted culinary giants like Bruce Bromberg, co-owner of Blue Ribbon Restaurants, who was instrumental in attracting high-end music talent to the event.

One of the key strategies behind the event's success included setting up the chefs for their own individual success by coaching them to develop high quality food in a festival-friendly package. According to Cohen, festival food needs to be easy, affordable and absolutely delicious. She then integrated several culinary concepts into the event with food trucks, several pop-up restaurants and chef demonstrations.

"We're in a culture now where food is extremely important," says Cohen, who asks that restaurant partners working at the event provide access to the chefs and/or owners, versus catering staff. "Our festival is a little different because we have the actual chef from the actual restaurant cooking the food and interacting with the guest."

Life Is Beautiful shifted how its culinary options were presented to festival attendees between 2013 and 2014, leading to an increase in food and beverage sales. Event organizers moved the individual chefs' venues from the central culinary village in year one to a more dispersed layout near the four stages in year two.

Millennials Demand Authentic, Local & Experiential

In September 2014, *Forbes* writer Stephanie Denning wrote: “One thing is certain: Millennials’ relationship to food is special. They want it to be authentic, they want to know how it was produced, and they want it to be a shared experience.”

Look at millennial travelers’ behaviors today and you will have insights into the mass-market trends of 2020. Millennials were among the first to embrace the sharing economy, skip over travel agents in favor of online bookings, trade big box chain hotels for well-designed and independent boutique lodging, and seek out authentic local culinary experiences in every destination they visit.

Therefore, understanding millennials’ gravitation toward local food experiences is important for destinations, because it’s becoming prevalent for all generations in many different markets.

Furthermore, according to Skift’s research report “The Rise of the Millennial Traveler,” the annual purchasing power of millennials is \$170 billion and growing. The demographic is expected to account for half of all global travel spend by 2020.¹⁶

Millennials’ driving values are happiness, passion, diversity, sharing and discovery. Millennials also look for immersive travel experiences. They want to live like a local, share their experiences across social media, and seek recommendations from peers or user-generated sites who have already experienced the local vibe of a place.

The “Rise of the Millennial Traveler” report reads: “Millennials are looking to hack travel, based on their perceptions about what everyone else doesn’t have. They want to feel

like they’re insiders and in on this little secret about where to find a great little restaurant in a hidden neighborhood. They’re always looking for some level of inside information. It speaks to the millennial trend of wanting something special.”¹⁶

When it comes to food and beverage, millennials are not just interested in the small boutique cafes and restaurants that locals frequent. They want to understand the entire storytelling surrounding the experience, because millennials tend to be more mindful about their travel choices as they relate to a particular local community.

Talking about food options and culture in an authentic and conversational manner is as important as the local ingredients and hidden watering holes themselves. For many DMOs, food and beverage has become a cornerstone of tourism campaigns aimed at millennials.

For example, food was one of ten travel niches that Tourisme Montréal identified when researching millennial travel trends. The organization then worked with food bloggers and lifestyle publications to create web content that spoke to millennials’ food interests. The DMO also aligned with partners like OpenTable to further promote the dynamism of the city’s impressive F&B infrastructure.

“As we know with millennials, they’ll skimp on accommodations but they won’t on good food,” explains Emmanuelle Legault, VP of marketing for Tourisme Montréal.

Austin, Chicago, Philadelphia and other DMOs have also tapped local bloggers to communicate to millennial visitors their destinations’ diverse food scene within a cultural context.



According to “The Rise of the Millennial Traveler” report, events and destinations can attract more millennial travelers by

1. creating a local travel blog
2. paying attention to user reviews
3. crowdsourcing social media content
4. investing in better media communications and imagery
5. collaborating with millennials

Fascination With Food Trucks

According to the Technomic report, “Understanding the Foodservice Attitudes & Behaviors of millennials,” the researchers found that 88% of American millennials surveyed are interested in trying new types of food.¹⁷

“Destinations creating new experiences, whether it be a festival, food trail or tour, need to think about the millennial consumer and what’s important to them,” says LeHeup. “It’s very different from previous generations, and I think programming has to evolve to take them into consideration.”

One very visible indication of this is the explosion of food trucks in cities around the world. According to Ypulse, 47% of millennials have eaten at a food truck before.¹⁸ In Portland, the food truck scene has taken on legendary proportions with more than 500 trucks, changing the urban landscape while encouraging sustainability, community, creativity and entrepreneurship. In Austin, there are even tours dedicated solely to visiting food trucks.¹⁹

TOP 15 CITIES WITH MOST FOOD TRUCKS BY POPULATION

	# OF FOOD TRUCKS	POPULATION	FOOD TRUCKS PER 100,00 PPL.
Orlando, FL	94	249,562	37.67
Miami, FL	140	413,892	33.83
Washington, DC	172	646,449	26.61
Minneapolis, MN	87	392,880	22.14
Austin, TX	156	842,592	18.51
Denver, CO	113	634,265	17.82
Atlanta, GA	78	443,775	17.58
San Francisco, CA	127	837,442	15.17
Tampa, FL	51	347,645	14.67
Honolulu, HI	44	374,658	11.74
Seattle, WA	71	634,535	11.19
Nashville, TN	66	624,496	10.57
Cleveland, OH	39	390,928	9.98
Boston, MA	59	636,479	9.27
Las Vegas, NV	52	596,424	8.72

Source: <http://www.businessinsider.com/best-cities-for-food-trucks-in-america-2014-5>

The food truck industry is rapidly ascending up the food tourism value chain. Food trucks are expected to generate about \$2.7 billion in revenue in the U.S. by 2017 according to Intuit’s report, “Food Trucks Motor Into the Mainstream.” This is a fourfold increase from 2012, as estimated by the National Restaurant Association.²⁰

These one-stop, four-wheel shops with signature dishes from literally every corner of the world are now being integrated into major events and festivals as a way to attract young attendees, increase spend and cater to every taste bud.

Increasing awareness for different cultural cuisines has led to the rise of food trucks, while at the same time, increased access to food trucks has raised awareness of different cultures’ signature dishes. The mobile restaurants are also contributing to the rise in food-related media both on social networks and major television channels. For example, the Food Network introduced Eat Street in 2011 to appeal to viewers’ interest in food truck culture.

Sources:

- Brunch Truck Sundays, Beamsville, ON, Courtesy of Ontario Culinary Tourism Alliance
- Carte Blanche Food Truck, Portland, OR, Courtesy of Flickr user, Jen Blatt
- Pastrami melt from The Grilled Cheese Truck, Los Angeles, CA, Courtesy of Flickr user, esimpraim

Marketing Food Tourism



Source: Southern Ocean Lodge, Kangaroo Island, SA
Courtesy of Restaurant Australia Homepage

Identifying and building upon a destination's culinary heritage and assets requires the cooperation of many different travel suppliers throughout the destination. It also requires everyone to work together and market the product to tell a unified story.

However, as discussed at the beginning of the report, OCTA recommends that destinations have their ten criteria for successful food tourism in place before they can authentically market themselves as such.

"What we caution a lot of destinations is that before they go to market, and create the expectation from a consumer, to make sure that the product that they're marketing is truly market-ready," explains LeHeup. "Once they've done that then they can move into the marketing phase."

LeHeup suggests that marketing campaign priorities should begin with proactively engaging all of the stakeholders, and encouraging them to share in the vision by clearly communicating (internally and externally) the economic, social and community benefits of food tourism. By bringing together as many different ideas as possible from all participants, it helps ensure more integrated, believable and rich storytelling revolving around the culinary experience.

The end goal is establishing consistency

among all of the food tourism products to build the credibility of the destination brand.

For example, Spyridon in Nashville knew that building his city's culinary reputation successfully had exponentially greater potential with the cooperation of its much larger and more recognized music industry. "The willingness of some people in the music industry to take a chance on creating the Music City Food + Wine Festival has had a big impact," he says.

In 2012 and 2013, Fáilte Ireland partnered with a dozen "food ambassadors" selected for their passion for Irish food and commitment to spreading awareness of local cuisine in their respective regions. Many of these ambassadors were owners of food tourism businesses themselves. The 2012 participants shared insights about the importance of cooperation, a focus on experience over product, and the necessity to start small and scale as demand increases.

Fáilte Ireland's "Food Story Toolkit" creates a single message around the country's food tourism experiences and the tourism board's strategic priorities around building a food tourism industry. It shares market research, resources and step-by-step guides to develop food festivals and food trails. Providing such resources to all potential stakeholders allows products to emerge organically with unique value propositions.

Creating a Food Tourism Voice

Equally as important as creating a culture of collaboration, DMOs have to determine the overall tone and messaging that will be communicated to the consumer. Campaigns require content from authentic sources that are designed to be shared by both everyday travelers and social media influencers. Hearing about a product through one of these channels often has a significantly stronger impact than direct marketing from the destination itself.

For example, South Australia defines its food tourism products as “accessible” and “adventurous,” versus using words like “sophisticated” and “refined,” to create the positioning it needs to attract next-generation experiential travelers. That voice is a complete 180-degree shift from a decade ago.²¹

As part of its culinary advertising campaign, Tourism Australia invited 86 social media influencers for a one-day meet-up called “Invite the World to Dinner.” From a social media perspective, the event resulted in hundreds of thousands of impressions. According to Tweet Archivist in November, 2014, the last 100 tweets for #seeaustralia garnered 26,000 impressions, and #restaurantaustralia garnered 190,000 impressions. This campaign also recorded a 7.3x discovery lift, or bump in awareness, of the brand hashtag.

In 2005, Providence ranked 7th out of ten New England cities for quality restaurants. To improve their position, Providence Warwick Convention & Visitors Bureau decided to develop a food tourism brand, built around the area’s abundance of seafood, fresh produce, young talented chefs coming to the region, and Johnson & Wales University’s culinary program.

The DMO started by launching a restaurant week in 2006 that attracted almost 100 participating venues. Then it started developing a significant volume of culinary content, with a particular focus on building off of the “chef

as personality” trend. This content was then integrated into its advertising vehicles. Campaigns also ran in online media outlets with an established “foodie” audience including the *Boston Globe*, *Eater* and *Saveur*.

Providence continued to build on its culinary media campaign each year, and in 2011, the DMO launched a new website with a strong F&B focus, which increased traffic 59% in the first year. In 2013, *Travel + Leisure* voted Providence the number one food city in the U.S.²²

Establish & Communicate ROI Metrics

In addition to clearly outlining messaging and branding around a food tourism strategy, it is equally important to establish measurable and up-to-date metrics. These include visitor arrivals in a destination, total spend categorized by activity, ticket revenues for events, and/or shares for a social media campaign. Outlining those goals not only activates stakeholders and gives them targets to aim for, it also inspires involved parties to measure the impact of their own business efforts.

The Kentucky Bourbon Trail and newer Kentucky Bourbon Craft Tour are both seeing annual increases in visitors. Mainstream distilleries welcomed a record 571,701 visitors in 2013, with an additional 61,698 visitors exploring smaller craft distilleries. The numbers are released annually by the Kentucky Distillers’ Association, allowing both the state tourism board and participating distilleries to see the impact of the bourbon trails and any new product development.

For example, visits to distillers increased 12% in 2012 in part due to the opening of the Evan Williams Bourbon Experience. Distillers are also introducing new programming including bluegrass music and mixology classes to further attract visitors, creating a culture of collaborative competition—or “co-opetition”—between the travel suppliers. The continually evolving experiences also provide a continuous source of new content opportunities for Kentucky Tourism.

6 Key Strategies to Develop Food Tourism

Determine if you're market ready to receive food tourists. The Ontario Culinary Tourism Alliance recommends a set of ten criteria for developing successful food tourism (listed in the report), which together will ensure a local “taste of place” is delivered and meet the consumers’ expectations. DMOs need to first honestly assess their agricultural assets, and their food and beverage-specific travel products, to pull out what is unique, compelling and marketable. Then DMOs have to determine if and how different suppliers can be integrated to create a layered culinary travel experience that aligns with the destination brand.

Create a network of like-minded hospitality and tourism suppliers.

There needs to be a dedicated network of people and companies who are passionate about local food travel experiences. Equally important, all participants should be committed to supporting the people in the community who produce and prepare the local food and beverage product. The communal network needs to be open and available to all stakeholders. It almost goes without saying that the more independent, locally focused and like-minded that participating companies are, the better. Reach out to cultural influencers and thought leaders who are active in ancillary fields that can potentially complement the food travel experience, such as music, design and the arts. The food tourist is looking for their experience to be enriched by these areas.

Collaborate with the network to build food experiences. Co-creation is important to develop a well-rounded food tourism infrastructure in any destination. Once a network of suppliers is established, crowdsource as many ideas as possible to create immersive local destination experiences. Seek out different potential partnerships integrating meals, tours, tastings, lodging, education and entertainment to develop dynamic product opportunities. Determine how all of these experiences can help deliver advocacy for the community and support special events.

Create special events and social media promotions. Interdisciplinary events combining food and other cultural activities are popular because they attract multiple markets and expand the audience beyond just hardcore food fanatics. It is of primary importance to make sure the people who actually produce and prepare the F&B in the destination are able to engage with visitors at the event. Special events are also good business drivers because participants and the media will assist in their promo-

tion through their personal and professional social networks. Build social media contests aligned with the event, and be aware that coordinating the online conversation is a major endeavor. Make sure to commit the necessary resources required to do it well.

Develop visually engaging campaigns with an educational message.

Promotional campaigns must show how the local culinary experience is unique to the destination by specifying local F&B industry personalities, their product, and the different venues and environments that visitors can explore. Food tourists are interested in learning about new food and their cultural contexts in a dramatic locale, so those elements should be expressed in all promotional vehicles. High-impact professional photography is paramount, but make sure to supplement that with a comprehensive source of user-generated photos to build organic consumer engagement.

Measure everything and share it. An effective food tourism strategy includes benchmarks that define overall business goals. These should be broken down as much as possible by market segments and industry sectors to gauge what works well and what needs to be reworked during regular performance reviews. Once those metrics are baselined, they need to be shared with everyone who wants access to them. Transparency is important to create trust among all stakeholders, drive a culture of collaboration, and motivate individual participants to maintain their levels of commitment.

Cultivating Food Tourism & Economic Growth



For over a decade, the Ontario Culinary Tourism Alliance has worked to cultivate a culture around local food experiences and helped countless businesses, destinations and sector organizations see the potential of this growing tourism segment.

When it comes to destination development, it is often the development piece that gets overlooked in favor of building buzz through marketing and promotional campaigns. We call this “Shiny Brochure Syndrome”. Attractive branding and sleek packaging may draw a visitor in, but if the product doesn’t deliver on its promise, those visitors will be unlikely to return. What’s worse – they can instantly upload and broadcast their disappointment through social media and on social review sites.

Premature product marketing can do more harm than good. A critical mass of market ready businesses and experiences are required to successfully develop financially sustainable, successful products and a leading tourism destination. There is only one chance to make a first impression, especially given the increasingly competitive tourism market and the reliance on social media and review sites. Suddenly, disappointed consumers can broadcast their feedback to the world with the swipe of a finger. Poorly developed products will also deter participating businesses from staying involved and new businesses from becoming involved in the future.

To avoid this, it is important that businesses, destinations and tourism organizations work together to look critically and reflexively at the existing experience being offered. What makes this product interesting? Does it tell a story? Is this the story you want it to tell? Is it strong enough to draw visitors? Will those visitors be satisfied? Will they want to return?

These are not easy or comfortable questions to ask, but they are necessary to successful food tourism development. To assist with this, OCTA developed the Experience Assessment Tool (EAT™). This industry leading system provides our clients with a detailed, objective assessment of their current ability to meet and deliver on the expectations of today’s food tourist.

EAT™ allows our clients to take stock of their current offerings and determine which assets and products are ready to be marketed. Armed with this considerable base of knowledge, clients can confidently set realistic goals and timelines for development. Perhaps most crucially, the system also identifies which areas must be improved before you hit go on your latest marketing initiatives. For instance, there's no point in developing a food trail if half of the businesses do not have signage or a retail space to welcome guests when they arrive.

The increasing competition to attract today's food tourists can make it tempting to launch a product before it is ready. The importance of performing an experience assessment, just one part of the food tourism development cycle, cannot be overstated. Without this initial (and on-going) process, businesses, DMOs and tourism organizations run the risk of over-promising and under-delivering.

When done well, food tourism can become a primary driver for tourism and valuable tool to boost economic, social and community development – in any region. By increasing the opportunities for visitors (and locals) to enjoy an authentic “taste of place”, food tourism can have a significant impact on the growth and viability of local food systems.

Let us show you how.



Rebecca LeHeup
Executive Director, Ontario Culinary Tourism Alliance

Contact me for more information:

Office Phone: 416 644 3601

Cell: 613 471 0102

rebecca@ontarioculinary.com

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Contact us for more details:

Rafat Ali,
Founder & CEO, Skift
ra@skift.com
212-564-5830

Further Reading

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