

REPORT ON GASTRONOMY TOURISM IN ITALY 2020

EXTRACT OF «TRENDS» – ENGLISH VERSION

Associazione Italiana
Turismo Enogastronomico

Roberta Garibaldi



Supported by:



With the
patronage of:



In collaboration
with:



PREFACE

2020 is the UNWTO's Year of Tourism and Rural Development to which wine and gastronomy contributes with a central role.

Gastronomy is a fundamental driver that not only enriches the tourism supply, but it stimulates also the economic, social and cultural development of a territory.

An integrated sector encompassing a wide value chain including different, but deeply interrelated fields. Gastronomy tourism needs new economic and promotional strategic models. Strategies need data and reasoned knowledge necessary focused and contextualized. In this sense the «Report on Gastronomy Tourism in Italy» by Roberta Garibaldi and her team represents an important reference point able to make us understand main trends leading us in discovering travel motivations in a global context where people travelling constitute the 25% of the global population.

Alessandra Priante, Direttore Regione Europa, UNWTO

INTRODUCTION

Gastronomy has assumed great importance in tourism nowadays and it is considered one of the fundamental travel elements. This evidence finds confirmation in a number of researches on this topic, starting from the UNWTO World Tourism Organization that organizes from 2015 annual conferences to deepen the different aspects of gastronomy tourism.

The broad debate created has stimulated new knowledge diffusion, however large gaps to be filled on supply and demand dynamics, in constant and fast evolution, persist. This is the reason why it is important to adopt new tools able to capture changes and indicate possible strategies.

The «Report on Gastronomy Tourism in Italy» tries to meet these needs, a work which returns an updated picture of the situation in Italy and around the world with the aim to provide institutions and stakeholders with a tool able to support tourism policy decisions and the development of proposals able to satisfy modern tourists.

The work developed under the umbrella of the Italian Association of Gastronomy Tourism, a no profit Association created with the aim to spread *know-how* and collect funds to sustain permanently this research.

As a consequence of the complexity of this work, the 2020 edition is composed by three volumes:

- This work is the first and illustrates the trends. It is the result of a careful analysis and synthesis of what has emerged from the studies conducted in recent years. This overview is enriched with the contributions of international and national experts operating in the sector, as well as offering an eye on the international situation of countries such as Greece, Belarus, Spain, Thailand and South Africa. This work - as well as the second volume - has obtained the patronage of ENIT - Italian Tourism Agency, Federculture, ISMEA, Fondazione Qualivita and Touring Club Italiano, and the support of UniCredit and PromoTurismoFVG. This is an excerpt of the contributions that were provided in English language. The full report is available in Italian language.
- The second offers an insight into the situation of the current Italian food and wine-tourism offer and its components, both at European level - with a comparison with our main competitors - and at regional level. Returns up-to-date statistical data on consistency and positioning, from excellent productions to the restaurant offer, from farmhouses to museums, passing through production companies and the Wine and Flavours Roads. Thanks to the collaboration with TripAdvisor, Semrush and Travel Appeal, we also wanted to deepen the topic of online, from researching experiences on the web to selling, passing through user reviews. It is the ideal tool for Regions, Chambers of Commerce, destinations, federations and bodies that need comparison data.
- The third is entirely dedicated to the presentation of the behaviour of international tourists, their attitude to participate in food and wine experiences while traveling, with specific insights on some individual countries (France, United Kingdom, United States of America, Canada, Mexico and China) and on generations. This work is the Italian edition of the "Food Travel Monitor 2020" by the World Food Travel Association. It was possible thanks to the support of the Quebec tourism agency. It is aimed at companies, entities or territories that intend to develop promotional and welcoming actions towards the international target.

The volumes are available digitally, the first can be downloaded for free, the other two are on sale. Through the purchase and / or the organization of moments of presentation on the territory it will be possible to support research activities for the next years.

My personal thanks go to the sponsors, authors and collaborators who made possible the publication of this research.

I wish you a good read.

Roberta Garibaldi, President of the Italian Association of Gastronomy Tourism

SCIENTIFIC COMMITTEE



ROBERTA GARIBALDI

Author, Italian Association of Gastronomy Tourism



CARLOS FERNANDES

Instituto Politécnico de Viana do Castelo, Portugal



GREG RICHARDS

NHTV Breda University of Applied Sciences e Tilburg University, Olanda



MARCANTONIO RUISI

Università degli Studi di Palermo



MATTHEW J. STONE

University of California, Chico, USA

TRENDS | STRUCTURE



FOCUS

- Sustaining gastronomic practices
- Gastronomy: authenticity and innovation
- Innovation in restaurants
- Opportunities for successful food tourism experiences
- Land and landscapes
- What would you like to eat ?
Local fresh fish! Fish tourism
- We are what we produce: the new cultural role of DOP IGP
- Farms in Italy
- Tourism and olive oil



AROUND US

- Spain
- Thailand
- South Africa
- Greece
- Belarus

REPORT ON GASTRONOMY TOURISM IN ITALY 2020

SUPPLY: STATISTICAL ANALYSIS

Associazione Italiana
Turismo Enogastronomico



Supported by:



With the
patronage of:



In collaboration
with:



SUPPLY | STRUCTURE



GASTRONOMY TOURISM SUPPLY

- Certified products
- Restaurants
- Farms
- Taste museums
- Wineries
- Breweries
- Olive oil industry
- Taste and wine roads
- Tourism revenues
- Consistency and dynamics of Italy gastronomy tourism supply



FROM INTERMEDIATION TO BIG DATA

- Online presence of gastronomy tourism supply on regional tourism portal
- Online presence of gastronomy experiences in collaboration with Semrush
- Online reputation of gastronomy experiences in collaboration with Travel Appeal
- Presence of «Destination Italy» supply in foreign tour operators
- Online sale of gastronomy experiences in collaboration with TripAdvisor

REPORT ON GASTRONOMY TOURISM IN ITALY 2020

INTERNATIONAL DEMAND



FOODTRAVEL
MONITOR 2020
WORLD FOOD TRAVEL ASSOCIATION



ROBERTA GARIBALDI

Author, Italian Association of Gastronomy Tourism



MATTHEW J. STONE

Author, University of California, Chico, USA



STEVEN MIGACZ

Author, Roosevelt University, USA



ERIK WOLF

Editor, World Food Travel Association

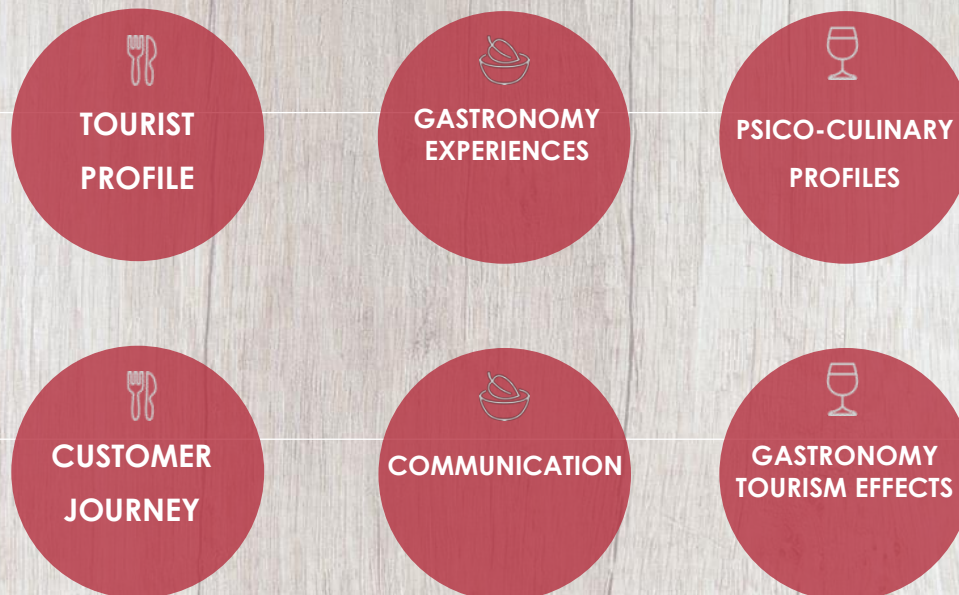
© 2020 by World Food Travel Association

All Rights Reserved.

www.WorldFoodTravel.org

Québec 

INTERNATIONAL DEMAND | STRUCTURE



EXTRACT - TRENDS 2020

English Version

Roberta Garibaldi



SUSTAINING GASTRONOMIC PRACTICES

Greg Richards, Breda University

Sustainability is a hot topic these days. People are becoming ashamed of flying, eating less meat and picking plastic up from the beaches they sunbathe on. We know we are using up the Earth's resources faster than we should, and that fossil fuel will run out in the now all too near future.

Sustaining resources is one thing. But how can we make gastronomy sustainable? This is an important question for places around the globe, not just because of the importance of gastronomy in peoples' quality of life, but also because it is a vital element in attracting people to visit. In Portugal, 81% of tourists indicated that they were satisfied with their gastronomic experiences (Turismo de Portugal, 2012).

When Rosario Scarpato started talking about 'sustainable gastronomy' at the turn of the Millennium, he was pretty much a lone voice in the world of academia (Scarpato, 2002). Now there are many more people talking and writing about sustainable gastronomy.





Many of these advocate the production of local and organic food, which would arguably protect traditional culinary systems threatened by globalisation (Berno, 2006). Similarly, Everett and Aitcheson (2008) argue that promoting sustainable gastronomy whilst encouraging the survival of local food production and the transmission of culinary knowledge. In the case of Costa Rica, Azofeifa (2016) noted that sustainable gastronomy can support the conservation of agrobiodiversity. Most of these authors approach the sustainability of gastronomy from the perspective of defending local cuisine and food production from the ravages of globalisation. Small producers need to be protected from large commercial food companies. These are the types of arguments advanced by the Slow Food movement, which promotes and seeks to protect local foods.

But the Slow Food approach is arguably elitist, seeking to preserve specific foods for the lucky few. While it may be important to conserve a wide range of the different elements of our global food 'DNA', also with an eye on the future, it will not solve problems of world hunger or help to satisfy the growing numbers of tourists. Scarpato (2002) further argues that the Slow Food approach also helps to destroy the specialised producers it seeks to protect, putting them under a global spotlight and creating demand that they can't hope to meet.

In my view the sustainability of gastronomy needs to consider more than simply protection or conservation, and it needs to focus more widely than the food producer.

We should think about the wider context of food, and the fact that gastronomy is based on food cultures that are deeply embedded in the places that those foods come from (Richards, 2012). This principle is reflected to some extent in the UNESCO designations of gastronomy as intangible heritage. For example, UNESCO has designated 'the French meal' as intangible heritage. Not a specific food, or an ingredient, but the culture of eating. As Scarpato suggests, this means thinking about a wide range of gastronomic practices: the survival of local food production, outlets and fresh markets; the viability of home cooking; the transmission of culinary knowledge and educating children's tastes; the right to pleasure and diversity; the impact of tourism on gastronomic authenticity and community wellbeing.

In essence, food cultures are social practices that have been developed over long periods of time in certain places. Hjalager and Richards (2002) described how gastronomy was analysed as a social practice by Bourdieu (1984) in his classic volume *Distinction: A social critique of the judgment of taste*. These practices, as Shove et al. (2012) suggest, comprise three essential elements: materials, meaning and competences. Gastronomy is a good example of how these three elements work together. In order to organise a social practice such as a meal, we need basic materials: the ingredients that we use to prepare a certain dish. Even if we have food, however, it does not become a meal until it is given meaning, for example by the people eating it, such as a family sitting down to eat together, or a specific combination of foods that signifies a special occasion, such as a Christmas dinner. Even being presented with a meal is not enough to make a practice: those eating and serving the meal also need certain competences that contribute to the successful completion of the meal.





These include, for example, skills in using eating utensils, understanding how certain foods should be prepared, presented, served and eaten, and a knowledge of table manners, etiquette and conventions of the group. All the elements of the social practice of gastronomy are important in sustainability. We need to sustain not just the basic ingredients that go into each dish, but also the knowledge, skills and creativity related to turning those ingredients into meals, and ultimately into experiences. It is no good helping to conserve a unique type of olive oil if people no longer know how to use it properly, or appreciate what they are tasting. This means we need a much more holistic approach to sustainable gastronomy. But it is also important to understand that sustaining something is not the same as preserving it. If we consider gastronomy as a cultural practice, we have to accept that gastronomy, just like culture, will change over time. Our tastes are not the same as those of previous generations, and our materials and skills have changed too. In considering one of the important principles of sustainable development, that of generational equality, we have to accept that our children will not be eating exactly the same foods in exactly the same way as our forebears did. What we need to ensure is that the food cultures that have produced such a rich gastronomic landscape, are sustainable. Inevitably, in many areas, this will mean changes in what we now consider to be local gastronomy, and the relationship between materials, meanings and competences. But gastronomic cultures have changed a lot in the past, and they will continue to do so in the future. The key is not protection, freezing cultures and foods in the past, but creative adaptation and innovation, taking food cultures into the future.

GASTRONOMY: AUTHENTICITY AND INNOVATION

Carlos Fernandes, Polytechnic Institute of Viana do Castelo

During the past few decades, society has been changing dramatically. The way we live has changed so much. This rapid and often unpredictable change affects the people's cultural expressions and practices. Perceptions of quality of life have been shifting and people increasingly question their surroundings, preferences and values. Changes in the social structures, perceptions and consumption require that contemporary society learn from the past, rethink the present and adapt itself to the current and emerging tastes and preferences of consumers.

The new consumers resist the idea that traveling often means engaging only superficially with the place they are visiting. It becomes necessary to allow travellers the opportunity to continually explore their own ideas and prompt desirable experiences over desirable objects. This shift taking place in consumer habits is putting into question the traditional definitions of heritage, as increased emphasis is placed on immaterial heritage whereas in the past it was more the material heritage. Immaterial heritage in the form of human values in a cross-cultural perspective is alluring to the new travellers and their exploring inclinations.





Current lifestyle trends have made the tide of standardisation as something of the past. For the contemporary traveller, traditional, static destinations have little appeal. Travellers are seeking lasting memories through physical connection, different types of experiences and emotional development for overcoming their expectations during a holiday. A growing number of people travel not to escape but to connect. People craving for opportunities to meet new people in an authentic way. Thus, there is a need for destinations to develop a new range of skills which go beyond the traditional management of tourism services and which move into the arena of experience development, creativity and innovation (OECD, 2012). New tourists are extremely experimental, willing to try new products, foods and attractions, but too impatient to give a second chance to products or service that fail to satisfy initially.

Gastronomy play a key role in trendsetting, image building and establishing quality standards demanded by today's resilient tourists. Food and wine producers will need to use their imagination to arouse the tourist's curiosity and meet their need for establishing new connections as well as novel experiences in a pleasant and convivial ambiance. Engage tourists in a taste of place creating new stories, new emotions rooted in sensory driven experiences about food and wine. Tourists reveal a lifestyle psychological need to learn who is behind the food, where does the food come from, how is it processed and come with the nostalgic perception of local food as healthy food. The appeal for more healthy food is no longer a trend; it is the norm.

The new tourist wants magic. It is not just about the food, but the emotional involvement expected, encompassing the history of the food they eat but also details about its preparation, ingredients, etc. Show that local products/ingredients are part of the local lifestyle. It is not just about consuming good food, but about consuming precious culture.

Such consumer behaviour suggests a more sustainable approach towards food production. Close relationship between a territory and its products in terms of quality and uniqueness, in the sense of “food is landscape in a pot”. Connecting visitors with artisanal food producers by focusing more on the market and less on the supermarket. Unelaborate cuisine with emphasis on local fresh seasonal ingredients and more transparency on the preparation of the food. Increasingly restaurants are opting for “open kitchens” where their customers can learn, discover and be inspired through gastronomy.

Tourists love local produce; they want to believe that the restaurant is using fish coming from the local dock/fishermen, the vegetables from the village shop, etc. Tourists are interested in eating local, eating fresh, eating organic, for example “from the farm to the table”. The enthusiasm for local produce and high quality ingredients, the matching of flavours and a more modern style of cooking and food presentation. I am convinced that the way forward is for cooks to look for inspiration in a region’s humble peasant cooking. Dishes embedded in tradition, but not simply reproduced in exactly the same way as in former times. Not limited to replicating the past, but about looking forward.





Menus taking on two considerations: based on what the cooks find in the market on that particular day and what they feel will appeal to the emotions of the customers. Being creative but keeping to the values of regional cooking. Innovate with traditional food but provide a privileged place for raw ingredients and terroir products from short supply chains. Local, artisanal and healthy as the motivation for innovation and added value.

Regional gastronomy exemplifies cooking distinction that is appealing to consumers. However, modern tastes and preferences require that this generation of cooks take on a new attitude for rejuvenating regional gastronomy. It is true that cooking is a continual process of learning what the ingredients can achieve. But regional gastronomy should be modified using good sense. How much innovation? Taste must always come first. Afterwards, one can think about decoration and other innovative techniques.

OPPORTUNITIES FOR SUCCESSFUL FOOD TOURISM EXPERIENCES

Matthew J. Stone, California State University

Food tourism has been well established as something that motivates people to travel and something they look forward to doing while traveling. As food tourism grows in popularity, destinations of all sizes are taking advantage of food tourism opportunities. The most successful destinations will analyze the complete offerings in their area to enhance the visitor experience. They will also help businesses in their regions to work together.

There are many trends and best practices in each different sector of food tourism (from cooking classes to tour operators to gourmet restaurants). For example, providing speciality tours (such as wine tours), offering exclusive experiences, and matching a business' offerings to their target market segments are not new within tourism. However, by looking at many individual trends across sectors, it is possible to identify trends which apply to the food and drink tourism industry as a whole. Destinations can use this list of trends to ensure that restaurants, bars, food producers, and tour operators are offering these elements. Together, they can help each destination to compete. At the same time, food and drink businesses, from cooking schools to breweries, can expand their offerings to include many of these elements.





Each operator can use ideas from other business segments to create a positive impact.

Food travel as a way to satisfy visitors – the importance of honesty

For some travelers, food is the core element of the visitor experience. Even for those who do not travel for food, it is clear that food and drink can enhance the visitor experience. Over 80% of leisure travelers state that food and drink experiences are important to the overall satisfaction of a trip (Stone & Migacz, 2016). Visitors develop expectations of the food in an area. One clear goal of food tourism then is to be sure that visitors' expectations are met. Destinations of all sizes are advertising and marketing their food and drink activities to tourists, but every destination is not as attractive as Rome or London or Singapore. Destinations which set unrealistic expectations for tourists can actually do harm to their destination image. Therefore, it is important that marketing messages are both appealing and realistic. Destinations (and each tourism provider) should offer an honest vision of what travelers can expect. Stock photos of random models enjoying food in some unknown location is not the way to market a destination or attraction. Each destination has something unique to offer, but they must be honest. Every city is not the "best city for food & wine!". Why is this honesty so important? Beyond meeting expectations, food can also be an inspiration for a return visit. Think about a visit to a famous historical site. Often, this could be a motivator for travelers to visit. However, they may not return to the historical site on their next visit.

Now, think about a traveler who has had a memorable meal at a local café or restaurant. That visitor may want to return to the same café each time they visit, and that experience may be enough to keep the destination in mind when they are choosing a future trip. Again, over 80% of leisure travelers say that food and drink experiences make them more likely to return to a destination. Building upon their honest assessment of what they can offer, destinations and successful food tourism providers are taking advantage of many trends in food tourism:

Pairing food with other interests Today's culinary travelers are cultural omnivores. They like food, but they also like the performing arts, music, and sports. They increasingly want active experiences, and sophisticated destinations are giving food travelers the opportunities to combine their interests. For some travelers, it may be satisfying just to visit several wineries just to enjoy the wine. However, as they visit more wineries over time, many will begin to develop specific desires for their experiences. This parallels the general growth in tourism in Europe, as well as Italy. Many travelers begin by getting a general taste: three days in Rome, three days in Florence, three days in Venice, and a day in Verona. Then, on a future trip, they may take a more specialized tour, focusing on Renaissance art, or the wines of Tuscany. Travelers also combine many interests across a trip. They like travel, but they also want to incorporate another element. They may want to take a bicycle tour or a motorcycle tour of Piedmonte. Or, they may wish to pair their interest in Italian food with their interest in cooking, by taking a cooking-centered tour.





Tour operators are offering ways for leisure travelers to maximize their personal enjoyment by connecting their interest in food or drink with another passion. In one example, it is becoming common to combine bicycle tours with culinary tourism. In Japan, Cycle Osaka offers 3-hour riding tours, where participants can enjoy local specialties like flame-grilled wagyu and fresh sushi. This offers an active experience for visitors. For true cyclists, Beer & Bike Tours offers week-long trips in locations such as Germany, Belgium, and Portugal. On the Portugal trip, riders enjoy the scenery and local meals, but a feature of the trip is visiting many breweries along the route. Successful food tourism businesses will find out what is most interesting to their visitors and begin to tailor specific tours to these individual groups. It may be as simple as pairing local beers with local foods. Or, they may find a link between food and another interest like architecture. The Chicago Architecture Center offers a tour called “Food and architecture of 1893” where visitors on the walking tour explore Chicago from the point of view of the 1893 World’s Columbian Exposition (“world’s fair”). They view buildings of the era and eat foods that were showcased at the world’s fair. While this experience is not exclusively a food experience, it shows a way that food can be incorporated into the local culture.

Offering multiple different tours. An introductory (or basic) tour is offered at most food tourism attractions, but successful providers are offering a variety of tours. The introductory tour is typically the most common, the most popular, and the most frequent tour, but attractions should not just offer a one-size-fits-all experience.

Even if visitors leave satisfied, many of them may not return because it would be the same experience the next time. Because destinations and attractions want return visitors, it is important to offer a reason to return. This can be accomplished through festivals and events, but it can also be accomplished by offering different tours. These tours can build upon their first experience to enhance or expand their knowledge. Or, it may just provide a new level of “fun” to the experience. Cooking classes use this approach. They may offer a “beginners” or “basic” course in making local foods, but they build on this by offering advanced classes and classes in different foods. The beginners course may be offered every day or every weekend day, with specialized courses less frequently. Other food attractions should follow this model. A family may visit a candy factory, take the basic tour, and (of course) buy products to take home from the gift shop. Offering additional experiences (make your own chocolate or a behind-the-scenes tour) will give them a reason to return. Another advantage is that these advanced tours (or courses) can be offered for a higher price because the visitors have a higher level of interest or involvement. While return visitors want the same level of hospitality and the same overall feeling, they do not want an identical experience. The Jelly Belly Factory in Fairfield (California) offers a self-guided tour, a guided tour, and an exclusive behind-the-scenes tour called “Jelly Belly University.” The Jelly Belly University tour is offered for \$59 per person and is limited to six participants who get to visit the factory floor.





Building specialized experiences. One trend emerging is in-depth or specialized tours, focusing only on one specific niche interest. In New York City, A Slice of Brooklyn Bus Tours offers a tour focused on Brooklyn Pizza and another focused on chocolate producers in Brooklyn. Any destination with a signature food, from pad thai to doughnuts, could benefit from these offerings. These experiences also appeal to experienced travelers may have already visited a region and have an interest in the local food or drink. A tourist may have already visited New York City for the museums and major attractions. On their return visit, they want to learn more about local life and local culture through an immersive food experience.

Offering exclusive experiences. Travelers are seeking exclusive experiences that cannot be booked on their own. They will be able to share stories about these experiences with their friends, knowing that their friends cannot take the same trip on their own—not without an experienced guide. Innovative tour operators have realized that their value lies beyond just coordinating a collection of experiences that travelers can book on their own. They are including behind-the-scenes and exclusive experiences. Anyone can get a reservation at a gourmet restaurant, but can the chef greet the guest and describe the concepts? Anyone can take a brewery tour with a tour guide, but who can offer a meeting with the brewmaster? Many More Travels offers culinary and wine experiences in California's Napa Valley. They feature chef-led tours which include cooking classes and exclusive experiences. Meals are enjoyed at private estates, and visits are included to wineries which are not open to the public without invitation.



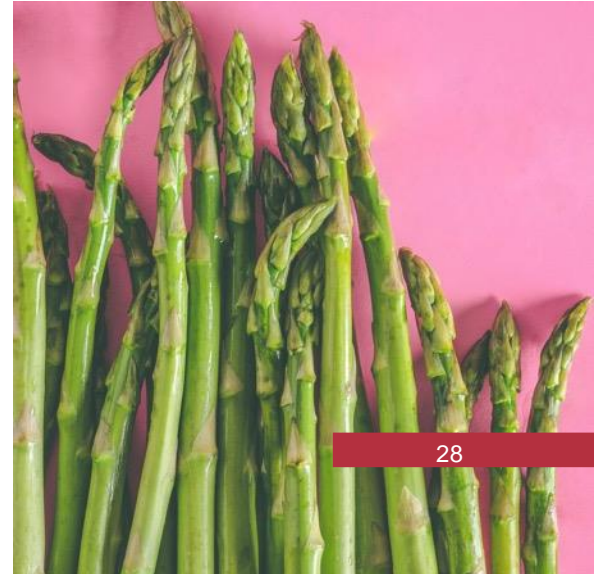
Destinations can also offer exclusive experiences by encouraging cooperation between multiple businesses. The Sierra Oro Farm Trail's Passport Weekend in Butte County, California, is a weekend event held annually in October. Visitors who purchase tickets receive a passport and a map to a variety of experiences, including vineyards, wineries, apple orchards, mandarin farms, olive growers, along with specialty food stores. It offers an exclusive opportunity to enjoy a variety of agri-tourism, food, and wine experiences. Many of the family-owned businesses along the trail (particular the small wineries and farms) are not usually open to visitors, so it is more than just another food festival. It benefits the local producers by creating both product sales and boosting brand identity. It benefits the local area by showcasing the entire region. Finally, visitors enjoy the unique experiences that are not available outside of that weekend.

Serving casual groups of travelers. Groups of families and friends have always traveled together, but this phenomenon is more common with Millennial and Generation Z travelers. Successful food destinations are making it easy for casual groups of friends to travel together. This may include ways for one member to book the group at experiences (like wine dinners or cooking classes) but for individuals to pay separately. For restaurants, it means making it easy for tables to split checks. Outdated policies like “one check per table” will not appeal to Generation Z travelers who may want to split expenses. Because it is often difficult for groups to make decisions, offering trip-planning tools, like self-guided maps and curated lists (through apps or mobile-friendly websites).

There are also casual groups of food lovers who want to travel together. Nearly every major city has food, wine, or beer lovers groups on Meetup.com and similar online platforms. Within a city, food lovers find each other—through facebook groups, by meeting at cooking classes, or at food or drink festivals. Their interest for food can lead to an interest to travel together. At the same time, the food lovers independently visiting a destination may be members of groups like this, so they can spread positive experiences to their food-loving friends.

Combining events for producers with events for consumers. The food production industries (from farms to factories) have often operated separately from the tourism industry. The California Craft Beer Festival is a multi-day convention (Wednesday to Friday) held annually in California for those in the craft beer industry. Educational sessions are based in several tracks, including: the business of beer, technical brewing, tasting craft beer, hospitality, and leadership. The audience for the convention is breweries, beer marketers, aspiring brewers, and related businesses. It builds brand identity among the state's craft beer providers as well as the craft beer industry in the state.

Giving visitors a way to find your products. Travelers buy food and drink to take home when they visit a destination. Wineries have offered wine clubs for a long time, but other providers can use the tourist experience as an opportunity to create recurring purchases. A cheese producer may have a quarterly cheese club. A farm or ranch may have seasonal offerings. Even if it is not a large profit center for the business, there are benefits to the brand of the consistent interaction with the customer.





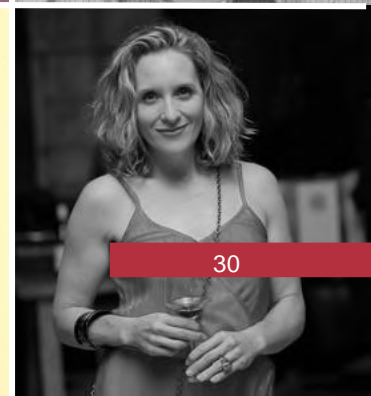
Thinking about the greater good. Travelers are interested in sustainability and want to do business with companies who are environmentally and socially conscious. This is especially common among younger travelers—in particular Millennials and Generation Z. Businesses who are not ahead of this trend may be left behind. The first step is to ensure that sustainability is incorporated into the business' operations. The next step is to communicate these sustainable action plans to visitors. It is important that these are impactful and honest because guests may be especially critical of companies which say they focus on sustainability when they do not. The Tillamook Cheese Company produces a “stewardship report” where they share their values and impacts with the public.

Bon Beer Voyages. Bon Beer Voyages is a tour company specializing in beer tours. Their competitive advantage is that they have curated unique experiences, dinners, and visits that are not available to the general public. Another feature of Bon Beer Voyages is that some of their experiences combine multiple interests, such as their “beer vacation cruise,” appealing to the river cruiser and the beer lover. Because of their networks within breweries and tourism, they also offer customized tours—from a group of friends to a “wedding beercation.” Visitors return home from these trips able to share their unique experiences with jealous friends.

Sierra Nevada Brewing. Sierra Nevada Brewing in Chico (California) and Mills River (North Carolina) creates many experiences for their guests. They offer a standard tour at each of their breweries, but also many specialized tours. Visitors (especially beer lovers) can continue to return and build upon their experiences.

AROUND US

- SPAIN
- THAILAND
- SOUTH AFRICA
- GREECE
- BELARUS





S

GASTRONOMY TOURISM IN SPAIN

- José María de Juan Alonso, KOAN Consulting
- Zaida Semprún, World Shopping Tourism Network

El turismo gastronómico en España

José María de Juan Alonso, KOAN Consulting

La gastronomía es una actividad, como cadena de valor, representa el 33% del Producto Interior Bruto de España. Es, además, un reclamo turístico de enorme peso. Según el Foro Mundial de Turismo Gastronómico de 2019, más de 260.000 turistas vinieron a España motivados por la gastronomía la del país, lo que supone un aumento de 16,7% respecto a los turistas gastronómicos del año anterior. Y, de conformidad con los datos de la Real Academia de la Gastronomía de España, el turista gastronómico constituye el 20% del total de los turistas que recibe España.

El gasto que estos turistas realizaron en nuestro país fue de 18 millones de euros en 2018 (Foro Mundial del Turismo, 2019). Si comparamos esta facturación con la que Ostelea (2015) daba para 2014 (9 millones), se puede confirmar la buena salud con la que cuenta esta tipología del turismo en España.

Los principales países de procedencia de los turistas gastronómicos en España (Ostelea, 2015) son: EE.UU, Francia, Suiza, Italia, Bélgica, Países Bajos, Irlanda, países nórdicos, Alemania y Portugal.

Las cinco regiones con mayor número de turistas gastronómicos son La Rioja, Andalucía, Madrid, Asturias y Cataluña.





El perfil de turista gastronómico que visita España

Al recibir más de ochenta millones de turistas al año, de todos los países emisores del mundo y de todos los perfiles socio-demográficos y socio-económicos, España presenta también todas las tipologías posibles de turistas gastronómicos.

El interés por la gastronomía se ha hecho viral en los últimos años en España en todos los medios de comunicación y en todas las clases sociales, y ello ha estimulado también el crecimiento exponencial del interés por el turismo gastronómico.

El turista gastronómico es muy variado y, en general, está interesado en la cultura alimentaria local, más que en los productos gourmet. Podemos clasificar al turista gastronómico en tres tipologías básicas:

El intencionado o de alta motivación. Comprende la mitad de estos turistas y se caracteriza por tener: un nivel socio-económico elevado; un nivel medio de ingresos; un alto interés en la cultura gastronómica; un fuerte deseo de viajar, y un alto interés por los asuntos sociales y medioambientales. Su principal propósito cuando viaja es experimentar y aprender la cocina local, así como descubrir los orígenes de la misma. Gasta en torno el 50% de su presupuesto en actividades culinarias.

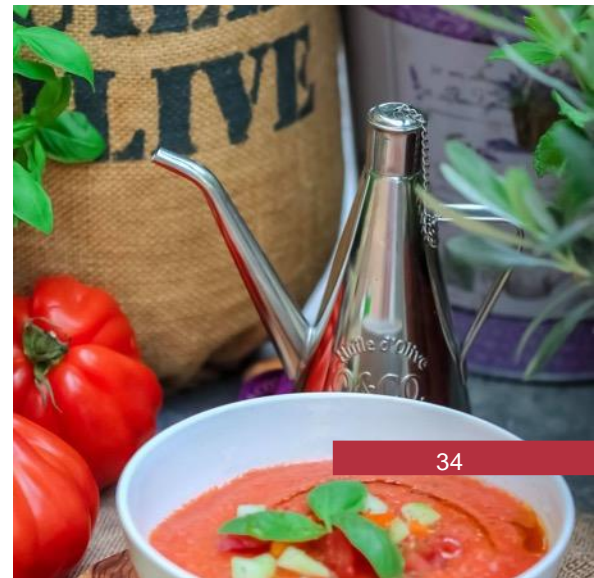
El oportunista. Supone aproximadamente un cuarto de los turistas gastronómicos. Disfruta al descubrir la gastronomía local, pero ésta no es su principal motivación al viajar. Las actividades culinarias que realizan suelen ser accesibles, sencillas y complementarias, como la visita a mercados locales. No obstante, a veces participan en actividades más intensas, si le resultan atractivas.

El resto pertenecen al grupo del turista gastronómico accidental. No son en realidad turistas gastronómicos en el sentido estricto del término, simplemente descubren la gastronomía en sus viajes.

Retos del turismo gastronómico en España

El turismo gastronómico en España presenta en estos momentos grandes retos. Uno de ellos es la necesidad de crear y poner en el mercado productos de turismo gastronómico en los territorios rurales e interiores. En ellos se va perdiendo cada año parte de la oferta gastronómica tradicional y productos agroalimentarios, debido a la despoblación y a la pérdida de diversidad de los cultivos; mientras que la oferta de locales gastronómicos y de tours gastronómicos en las grandes ciudades y en las costas más turísticas crece imparablemente. Otros grandes retos se pueden resumir como sigue:

- la popularización del turismo gastronómico de calidad hacia segmentos más amplios de la sociedad y las clases medias, ya que la oferta más diferenciada se centra todavía en niveles muy altos de precio y en productos gourmet
- la apuesta por la gastronomía saludable y la respuesta al aumento de las alergias e intolerancias
- la reducción de los precios y la ampliación de los canales de distribución de la oferta de gastronomía saludable, tanto hacia la ciudadanía en general como hacia los turistas, quienes cada vez demandan más este tipo de oferta





- la apuesta por los productos locales de Km0 o de proximidad, sostenibles y diferenciados, acompañados de una trazabilidad clara
- la profesionalización del sector, necesitado de expertos en turismo gastronómico como: guías e intérpretes del patrimonio especializados y con idiomas, diseñadores de productos, operadores de turismo receptivo
- la necesidad de una gastronomía y una cocina cada vez más sostenibles, que apueste por el clima y por la adaptación al cambio climático, por medio de la reducción de los costes energéticos y de las emisiones de GEI-gases de efecto invernadero ligados a la producción agroalimentaria y gastronómica
- la atención a la diversidad gastronómica de perfiles sociales, culturales y religiosos cada vez más variados en la demanda turística
- el equilibrio necesario entre la tradición y la innovación
- la consolidación del sector del turismo gastronómico, que en este momento está muy atomizado y aún no es capaz de dar respuesta a todas las demandas de las nuevas generaciones de turistas gastronómicos
- la reducción del desperdicio alimentario en la restauración y la hostelería.

Gastronomic tourism in Spain, origin or diversification?

Zaida Semprún, World Shopping Tourism Network

For an increasingly experiential traveler, gastronomy and the discovery of local products and producers has become one of the main factors in the choice of destination, and a rewarding and memorable way to dive into cultural identity.

In Spain, a tourist destination of sun and beach by antonomasia, the supply created around gastronomy tourism, has become one of the best tools of repositioning the strategy aimed at deseasonalizing demand, and increasing the number total of travelers consuming haute cuisine experiences, including visits to producers, when visiting our country, in 2018 amounted to 15 million according to official statistics.

If there is a product that stands out over others at the national level when it comes to visits from producers, it is the wine tourism sector thanks to the more than 4,000 wineries that the territory has, although more than 70% of the tourists who visit them are concentrated in 3 destinations, Marco de Jerez in Cádiz, Penedés in Catalonia and Rioja made up of La Rioja, Navarra and the Basque Country.

The first and second wine-tourism destinations cited are in turn two of the most visited sun and beach destinations, by both, the national and international travelers, so the offer of wine tourism as such is after the tourist success of the destination so diversification of the offer. The wine tourism destination that coincides in territory with the orography covered under the Denomination of Origin Qualified Rioja, encompasses three regional governments and three differentiated tourist strategies.





If any of them have been aligned from the beginning to Gastronomy as a differential value, it is definitely Basque Country.

The gastronomy and Michelin-starred chefs who have been covering it have been the fundamental pillar of the tourism strategy for more than 30 years, which has served as an engine for the development and creation of other complementary offers linked all of them to the identity of the Territory, so the origin of the touristic offer.

The Basque Country remains thus a favorite gastronomic destination for both the national and international gastronomic tourists, and more than 20% of travellers choose it for its gastronomy and wines.

San Sebastian, as a preferred destination, when it comes to savoring the famous “pintxos” has ceded the witness to Bilbao as the most requested destination. During the past year more than a million people from mostly Catalonia and Madrid, as far as domestic tourists are concerned, and from foreign markets such as France, the United Kingdom, Germany and the United States have visited the city.

In recent years there has also been a boom in gastronomic tourism of high purchasing power, international fans of good gastronomy who fly to Bilbao to taste, in just one day, the proposals of Michelin-starred chefs.

An explicitly gastronomic traveler, with a high purchasing level who selects the destination according to what he wants to taste.

A very specific typology of gastronomic traveler to follow the track, not only in Bilbao but in the rest of Spanish cities that bring together premium gastronomic offer such as Barcelona or Madrid.



GASTRONOMY TOURISM IN THAILAND

Wantanee Suntikul, The Hong Kong Polytechnic University

Gastronomy tourism campaigns were started as early as the 1990s by the Tourism Authority of Thailand (TAT). In 1994, the Thai government launched the successful tourism marketing campaign, “Amazing Thailand”, which also highlighted Thai cuisine. However, these marketing campaigns did not systematically promote Thai gastronomy, but merely promoted it as one of many elements of Thailand’s intangible tourism attractions.

The first official promotion initiative explicitly for Thai gastronomy dates to around 2003 with Thai Prime Minister Thaksin Shinawatra’s ambitious campaign named “Thai Kitchen of the World.” This campaign promoted Thai food as a leading world cuisine, “on the principle of creative economy under the ‘Thailand Food Forward’ concept (Government Public Relations Department, 2009). The Thai government’s goals for the “Thai Kitchen of the World” initiative are to make Thai food products a leading export of Thailand, prioritizing safety, health and sanitation; to stimulate export for raw materials and ingredients for cooking Thai recipes; to encourage Thai restaurants abroad to act as tourist information centers as well as marketplaces for the “One Tambon (district) One Product” campaign, and to increase the number of Thai restaurants abroad to promote the “real Thai taste” with an international standard.

Such campaigns are effective catalysts for gastrodiploacy, the use of national and regional cuisine to encourage global publics to develop positive associations with a nation’s image and culture.





Under the “Discover Thainess” tourism campaign, which was launched in 2015, “Amazing Thai Taste” was promoted in 2016, depicting Thai cuisine as one of seven unique attributes of “Thainess”. In 2017, CNN named Thailand the world’s best destination for street food and the Michelin Guide started to publish a Bangkok edition in the same year, also giving one star to a traditional Thai street food vendor.

In the Second National Tourism Development Plan (2017-2021), the Thai government focused more on promoting regional food and Thai cuisine as elements of cultural identity and further encouraged the preservation of local authenticity as a tourism product. This approach is seen to be in line with the principles of community-based tourism, which the Thai government has been promoting throughout the past decade. Tourists can learn about the uniqueness of the cuisines of various regions of the country. Gastronomy tourism has become a pivotal aspect of Thailand as a destination, and localities have promoted their regional cuisines through community-based tourism, food festivals and culinary trails. The public organization “Designated Areas for Sustainable Tourism Administration” (DASTA) has integrated gastronomy tourism into its development of sustainable tourism in targeted areas in the country.

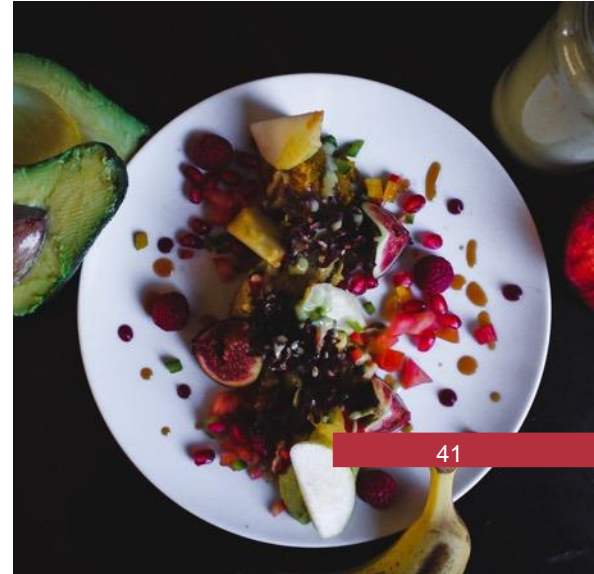
As Thai food has become a global cuisine, people are likely to come into contact with this culinary tradition outside of Thailand as well. Seeing Thai cuisine as a “storyteller of Thai culture”, the Thai government has worked to monitor and promote the quality of food and

service in Thai food exports, declaring in 2017 that the campaign had succeeded in establishing and enforcing standards and raising awareness of Thai food as the popularity of the national cuisine grows overseas.

The Thai government has acknowledged the importance of supporting unique and memorable food contexts such as homestays, cooking classes and experiential activities such as fishing and tea-leaf gathering as settings that are documented and circulated in words and images through social media channels. The Tourism Authority of Thailand has also collaborated in the production of television programs such as FoodWork and Caravan Samranjai that have promoted Thai cooking culture. Such initiatives are seen as contributing to the rise of cooking classes and other food experiences to become among Thailand's most popular tourism activities. These experiences, in turn, raise awareness of the value of sustainable tourism that preserves and appreciates local foodways.

For example, in top tourist destinations in Thailand such as Chiang Mai, cooking classes are the most popular tourism activity. Cooking schools are seen as an important tool, not only to spread appreciation of Thai food, but also to raise awareness of other aspects of Thai culture and traditions among international tourists.

Under the National Tourism Development Plan 2017-2021, the Thai government continues to expand gastronomy tourism as a component of a sustainable tourism approach in a growing number of destinations in Thailand, providing support to local communities and tourism-related enterprises (Department of Tourism 2017).





Best practice in Thai Gastrodiplomacy

With campaigns like “Thai Kitchen to the World”, Thailand has practiced gastrodiplomacy through successful tourism marketing strategies since the 2000s. It has significantly increased the competitiveness of Thai cuisine across the globe, extended Thai cultural influence and promoted agricultural exports. Thailand has built its nation branding through gastrodiplomacy which extends country’s soft power through cultural diplomacy. As a result, numerous Thai restaurants have been opened abroad and have become promoters of Thai national identity of overseas. Thai food is currently ranked as the 4th most popular ethnic cuisine and the 6th most favorite food type overall. Thailand’s tourism authority has utilized its tourism website to better facilitate tourists in accessing quick recommendations on restaurants with various search categories such as lifestyle, cuisine, destination, prices, tourism standards and other keywords.

The “Global Thai Campaign” is a potent demonstration of how different authorities can work together to create a unique national tourism image related to food, fashion, health and culture. It is a joint effort of the Ministry of Foreign Affairs, the Ministry of Commerce and the Ministry of Labor to market Thai cuisine through cultural promotion initiatives to distinguish the destination from others. The government also provides accreditation for overseas Thai Restaurants to monitor authenticity and quality with respect to listed criteria. By doing so, the Thai government can control the image-building role of Thai restaurants abroad.

These restaurants can also receive government funding and loans for operation (Lipscomb, 2019). Furthermore, there are government professional culinary training programs to qualify Thai chefs to work abroad. The government issues “Thai Chefs Work Visa” for them to work overseas in countries like New Zealand. The best practice of Thailand’s gastrodiploamacy campaigns have inspired other nations to use cuisine as a nation branding strategy. The Thai government continues to promote the national cuisine with programs ranging from Thai Ambassador to the promotion of Thai night market and street food as well as other collaborative efforts with private sector entities like the Association of Southeast Asian Nations, as well as organizing Embassy or Consulate General-hosted food and cultural events throughout the year (Ministry of Foreign Affairs of the Kingdom of Thailand, 2018). Current efforts focus on the US and Europe as well as non-western countries.





GASTRONOMY TOURISM IN SOUTH AFRICA

Mariette du Toit-Helmbold, Destinate.co

After 25 years of democracy, South Africa has come of age to become one of the most thrilling gastronomy countries in the world and a wine tourism mecca. Vineyards are being planted in new places, forgotten old vineyards have been brought back to life and a new generation of winemaker is experimenting and breaking new ground in winemaking and wine tourism. The proximity to quality fresh produce, award winning wines and the natural beauty of the Winelands have stimulated the food and dining industry in Cape Town and the surrounding Winelands with nine of the top 10 restaurants in the country situated here.

There are, however, many beautiful and unique wine regions in the world all producing good wine and as competition gets tougher, wine tourism becomes even more important as a tool to unlock the local distinctiveness of wine regions.

Visiting a winery and doing a tasting no longer stimulates travelers' appetites the way it once did. Nowadays they want to meet with the winemaker, interact with local communities and see where the wine is grown and made. It is important for all the wine farms and estates in regions to work together with the local tourism industry, cooks and operators to create unique experiences that will entice visitors to travel beyond the well-known regions.

Although food tourists do and will eat in restaurants, simple dining is not a food tourist's goal. Learning about a particular food, or even better a regional food culture is the big attraction. Visitors now want to be included in the food preparation process. It is all about being part of the kitchen culture of a destination.





Cooking in chefs' homes where an intimate group of diners, or even a couple, interact with a regional chef or authentic home cook and watch as off-menu courses are prepared and served, are the kinds of restaurant experiences food tourists crave. Cooking classes offered at various wine farms/estates in South Africa, are starting to touch on this authentic experience.

Tourists seek new experiences and want to grow and develop along with the product and experience. South Africa has a unique, high quality and good value for money culinary offering, which combined with readily available fresh produce, our wine tourism offering and natural beauty make us well placed to attract more of the growing number of food enthusiasts, hungry for interesting and meaningful experiences. The beauty of food tourism is that it is a key to unlocking the warm heart of regions, their culture, history, their food and most importantly, its people. It is always the people who are the heart and soul, the flesh and blood of the places we go to. People make brands memorable and when you are lined up on a shelf with many other brands, you want to be the one that is memorable.

If you think wine tourism is about wine tasting from one cellar to the next, think again. It is about the places, the people, the food, the cultures, the environment and the unique experiences of the wine region. In South Africa we have at least twenty defined wine routes. Most visitors explore the well-known wine routes like Stellenbosch, Constantia and Franschhoek and miss out on gems and smaller towns that lie beyond the mountain and main tourism routes.

In recent years, a greater focus on wine and gastronomy tourism has brought more visitors to these regions. Pioneering people in the wine industry have realised that their estates and farms' true potential for growth lies in gastronomy tourism, giving rise to new developments and a greater investment in experiences beyond the wine that entice visitors to stay longer and spend more locally.

Ultimately, tourism has to bring tangible benefit to communities and regions with more visitors spending their money in the regions that need it the most. In a country like South Africa where economic development is so desperately needed, we have seen food and wine tourism transform regions and empower small businesses within the value chain of wine and food tourism.

Visitors are loving the new more immersive travel experiences and are hungry for more meaningful and memorable experiences.

Stellenbosch Dine with a Local Programme

One such an experience is the Stellenbosch Dine with a Local Programme developed by the local tourism community in Stellenbosch. A network of selected community members are part of the programme and invite visitors into their private homes, opening the doors to hospitality characteristic only of such an intimate setting.

In a truly authentic experience, local cooks give visitors the opportunity to learn from Mamas or pick-up on a secret ingredient, all in the heart of Stellenbosch communities and townships.





From menus featuring traditional favourites to a fusion of our rainbow cuisine – slow-cooked homemade meals, prepared with love, are a guarantee.

Host families not only cook up a storm, they share their stories often with informal musical and artistic entertainment, giving guests a glimpse into what life is like in a local community. More and more visitors want to slow down when they travel, to really connect with the people and the places they visit and to know that their visit has a direct and positive impact on communities and places who need it the most.

It is a truly soul enriching way to travel and these experiences are often the highlight of travellers' stay in the region, surpassing the top tourist attractions and fancy restaurants.

A tiny seaside restaurant wins the World Best title

South Africa in recent years has made its mark on the international gastronomy stage with unconventional and proudly local cooks and chefs winning global accolades.

One example worth noting is a small, very simple restaurant in Paternoster, a traditional fishing village on the West Coast of South Africa, about an hour and a half from Cape Town.

Wolfgat is the brain-child of catering college drop-out, Kobus van der Merwe, who set up the tiny seaside restaurant in a traditional fisherman's cottage in his home town.

His goal is to celebrate the simplicity, local flavours and hospitality so unique to the West Coast. His style of cooking is informed by his love and knowledge of nature, its wild plants and the coastal bounty of seaweed and fresh fish combined with local tradition and customs. His food is seasonal, inspired by the weather and the ever changing sea conditions, with a naturalist approach and minimum intervention, allowing the wild and foraged ingredients to be the hero.

Wolfgat is as much about the community of Paternoster as it is about the exceptional food served. He is passionate about the local community and this passion shines through his team, all locals and many from fishing families who have never worked in a restaurant let alone had a job. He believes that by keeping it small (it accommodates no more than 20 diners at a time), they can keep it sustainable and true to his vision.

It is this ethos and commitment to sustainability and localism that won Wolfgat the coveted title of Best Restaurant in the World in 2019 by The World Restaurant Awards.





GASTRONOMY TOURISM IN GREECE

Heidi Lazani, Region of South Aegean Governor's Office Director

All stakeholders in Greece are highly interested in the development of gastronomic tourism in every single aspect (eg use of local products, development of special experiences). This debate has begun in a broader fertile environment, as Greek tourism is maturing. Its enrichment through inter-sectoral linkages is a priority. The need and the benefits of linking tourism to gastronomy have been perceived. Indeed, in the recent years has been research documenting that Greek gastronomy is a competitive advantage. Many parallel initiatives have been taken by central government officials, institutions and business groups (following a table with some of the most important actions and initiatives).

Overall, there is a significant and thriving gastronomic scene in the country's leading destinations, but there are issues to be resolved [e.g. range and composition of experiences against their competitors, enhancement of infrastructure quality in order to fully highlight the potential of the destination (eg Varvakios Central market vs Madrid market)]. Furthermore, the promotion of the Greek gastronomy has to be supported to increase its popularity within the traveling public. Finally, there is a lack of partnerships that hampers innovative actions and the scale up of good practices.

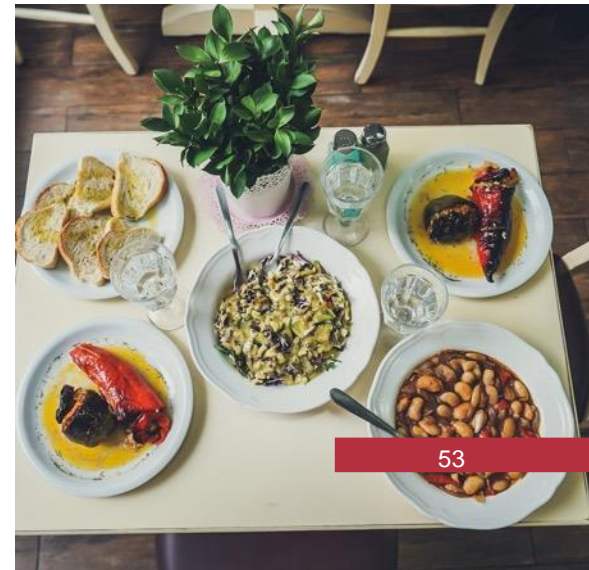
- Ministry of Economy and Development: Implementation of development policy; Promotion of gastronomy by the supervised organization “Enterprise Greece”.





- Ministry of agricultural development and food: Implementation of agricultural policy; Operational specifications of multifunctional farms; Certification of agricultural products and multifunctional farms by the supervised “Hellenic Agricultural Organization – Demetra”.
- Ministry of Tourism: Implementation of tourism policy; Issuance of a national quality label for the Greek Cuisine & and one for the wineries; Operational specifications of agro-tourism businesses; Quality standards designed to protect public health by the EFET (Hellenic Food Authority); Promotion of gastronomy by the National Greek Tourism Organization (EOT).
- Hellenic Chamber of Hotels: Coordination of the "Greek Breakfast" initiative in collaboration with local hoteliers' associations, local gastronomy networks, producers, local authorities, and agri-food control & promotion operators .
- Greek Tourism Confederation (SETE): Relevant studies in 2009 and 2018-2019 (the 2nd one by INSETE) 2018-2019; SETE Workshops (eg): Tourism, gastronomy and local identity: a Greek look into a global trend / Wine meets tourism; Promotion of greek gastronomy by Marketing Greece (eg Blogtrotters in 2018 was dedicated to Greek gastronomy); Implementation of the project "Gastronomic Destinations" by INSETE and Marketing Greece in collaboration with Greek Gastronomy Guide 2018; Implementation of actions according to the strategic plan of INSETE: Training programs for tourism professionals since 2015; Organizing and delivering about 60 seminars in 12 cities in 2019, with approximately 30 lecturers and 1,500 participants, as well as 29 different themes - 17 of which are directly related to culinary tourism services (59%).

- In the period 2017-2018 the whole program was highly rated by the participants (eg): lecturer's overall score 9.7, Overall program rating 9.3, Degree of expectations met 9,2 (*score range 0-10); Design and implement of about 8 “On Tour Tourism Schools” (a non -profit initiative that aims at reinforcing the tourism identity of destinations through themed lectures) in 8 different destinations in collaboration with the Kalamata Tourism School and local organizers. Facts & Figures: 8 destinations, with 1400+ participants, specialized workshops (eg wine, extra virgin olive oil, mixology); Strategic collaboration with the Greek Wine Federation. In every gastronomy workshop the section Food and Wine Pairing has been integrated, with the aim of: Promoting Greek wines and introducing professionals to the wide variety of choices, possibilities and peculiarities; Interconnecting professionals with producers and building a network of contacts that will contribute to the expansion of networking.
- Regions: South Aegean: European Gastronomy Region 2019 (goals) : Upgrading of the South Aegean region to a gastronomic tourist destination; Increasing standardized and certified local products; Use of local products throughout the tourism chain; Better cooperation and coordination of the whole food chain; Regional Operational Programs; Smart Specialization Strategies; Agri-Food Partnerships (eg the “Cretan Cuisine” label has specifications for various product categories, restaurants and grocery stores, and its proper use is controlled by extraordinary inspections).





- National Committee of Wine Tourism: Formulating the national quality label for wineries which was sent to all the local tourism authorities; Monitoring the process of issuing the national quality labels; Events (eg Open Doors, European Wine Tourism Day).
- SEAGE- Hellenic Agrotourism Federation: National Conference on Rural - Agricultural Tourism.
- Chambers: Chamber of Cyclades & Chamber of Dodecanese: Certification System - Aegean Cuisine Quality Label; Corfu Chamber: Certification System - Corfu Cuisine Quality Label; Heraklion Chamber of Commerce: Pancretan Forum for B2B Meetings between Producers and Tourism Businesses.
- Private sector initiatives: We do Local: Hotel and Producer Certification System, which promotes the distribution of local dishes / products and promotes local culture and production; Captain Vasilis and Carmen Constantakopoulos Foundation: Support and Promotion of actions that aim to train Messinia stakeholders on Sustainable Rural Development; Tinos Food Paths: Interactive events and activities every May involving local producers and businesses; Open Farm: A community of farms and processing units that provide training and guiding services; Gastronomy-Kos: An annual celebration of gastronomy and local products in Kos where collaboration between local producers and tourists is encouraged.
- Banks: Dine Athens Restaurant Week by Alpha Bank: As part of the 3rd "Dine Athens Restaurant Week" from February 1st to February 13th, 2018, more than 20,000 Athenians responded to the call and enjoyed high-end gastronomic creations at 100 selected restaurants at special rates.

The “Tinos Food Paths” initiative

We can refer to Tinos and the “Tinos Food Paths” initiative as a best practice due to the following reasons:

- Within just 5 years Tinos is not only perceived by tourists as a religious but also as a gastronomic destination.
- It is an initiative of a strong local character which was launched to strengthen the local gastronomic identity and at the same time the local economy
- The key success factor is shared benefit-driven partnerships

Tinos Food Paths is an organized movement of the Food and Beverages Companies Association of Tinos to deploy local food “wealth” and promote it a better way. As a punch, the island's young - mainly - catering businessmen are joining with others of the wider gastronomy sector (producers, winemakers, confectioners, brewers) in order to make Tinos a remarkable gastronomic destination.

The philosophy of this attempt is not only to promote the local gastronomy, but above all, to boost the cooperation between local citizens and entrepreneurs. It also aims to local residents and professionals to embed local gastronomy, enhancing confidence in local gastronomic treasures.

The main activities of Tinos Food Paths are the events that take place on the island in the second week of May. These events are very innovative and authentic and involve all the islanders.





Indicatively at Tinos Food Paths 2019 the following events took place:

- "Cooking" at the Old Fish Market in Tinos Town by renowned chefs from all over Greece.
- Speeches on nutrition and gastronomy by prominent representatives of taste and nutrition.
- "Magic Circles" in the village of Kalloni, Tinos, with interactive activities, artistic installations, hiking trails, malls, gastronomic delights and many stories.
- The 3rd Aegean Cocktail & Spirits Workshop by Difford's Guide featuring top bartenders and professionals from Greece and abroad to create cocktails made from Greek spirits.

Significant steps were taken during the years by the initiative of Tinos Food Paths: traditional crops revived, synergies blossomed, the island flourished, locals took care of it and protected it, while many foreigners charmed by the place, invested in it. "We need synergies between all sectors involved in the tourism industry with primary sector producers in order to offer the island visitors a complete culinary experience, "they say. Tinos matures smoothly as a culinary destination and seems to know how to manage it with courtesy, refinement and grace for the sake of preserving the authenticity of the place.



B

GASTRONOMY TOURISM IN BELARUS

Valeria Klitsounova, Belarusian Association «Country Escape»

Belarus has never been gastronomic destination with clear image. It has been associated mainly with potato dish (potato pancakes “draniki”). Even local people don’t have clear idea about Belarusian cuisine.

Belarus used to be a country with rich gastronomic heritage which combined local rustic and aristocratic cuisine with elements of Polish, Lithuanian, Jewish, Ukrainian and Russian cuisine. Unfortunately during last century because of revolutions, wars, socialism period our gastronomic heritage was lost.

Together with students of Belarusian State University we conducted a survey among young people (150 students). One of the questions was – “Which Belarusian dish do you know?” 90% of them have managed to recall only “draniki”. The same has happened with the audience of adult population. It is not surprising because most of restaurants in Belarusian cities are Italian, Japanese, Chinese, etc. We are losing the national identity and people perceive Belarus as “Dranikland”. But situation is changing very fast now.

According to National Statistical Committee there are 13371 catering facilities in Belarus including 3643 in rural area (2018). They are divided in the following proportion: 9,3% - bars, 33,7% - canteens, 3,8% - restaurants, 33,4% - cafes, 19,8% fast food places. 166 facilities are specialized in Belarusian cuisine, including 28 luxury restaurants and 26 restaurants.





There are several obstacles that slow down gastronomic tourism development:

Lack of specialization of cafes and restaurants

In the beginning of 2000-s there was the tendency in Belarusian restaurant business to combine in one restaurant cuisine of different countries. It was made to attract more visitors or because of the desire to give preference to quantity rather than quality. Thus, in a restaurant menu it was possible to find Italian, Belarusian, Japanese dishes and etc. They were rather expensive, not attractive and quality was not good.

In 2016-2017, the situation in the restaurant business has begun to change. Specialized restaurants have appeared in Minsk and became popular among the population because they have a higher quality of service and cuisine.

Lack of knowledge about national cuisine among Belarusian population.

There is a problem of stereotypical perception of national cuisine by the population. It is important to rise awareness of population about Belarusian cuisine. To achieve that it is necessary to use the culinary potential of rural regions because each region has its own interesting dishes with a unique history.

Cafes and restaurants with Belarusian cuisine are not so popular.

Now public culinary workshops, regional cuisine festivals, unusual gastronomic projects, markets, thematic weeks started to contribute to the popularization of national cuisine.

Low marketing level in gastronomic tourism.

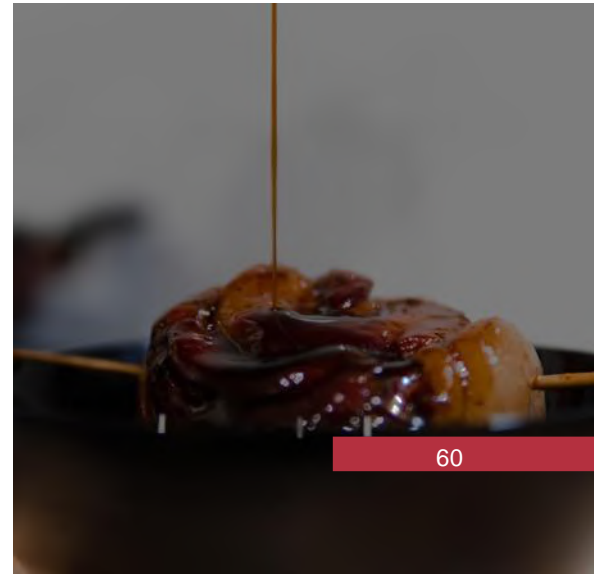
For centuries Belarusians life was associated with the Lithuanians, Russians, Poles, Ukrainians, Jews. Each period of the Belarusian history influenced people lifestyle, their habits, products and Belarusian cuisine. Its interpretation in modern cuisine could be interesting for many tourists.

Also a significant part of Belarusian history relates to the USSR period. Restaurants in USSR style with well-composed menus attract both Belarusians and foreign tourists who are always looking for new emotions. Soviet architecture in the country and atmosphere also contribute to this. Thus, one of the possibilities for interpreting Belarusian cuisine may be its connection with the Soviet past.

There is a tendency now to form a brand of “modern Belarusian cuisine”. Belarusian cuisine in the 21st century is characterized by a search for something unique that could distinguish Belarusian cuisine from neighbors. It focuses on the value of using local products.

Minsk plays a significant role in the development of gastronomic tourism in Belarus. Many interesting festivals and farmer markets with local food have appeared last year. People now are trying to follow modern trends. And trends to buy local product work very well in Minsk.

In rural areas gastronomic tourism is becoming the unique product. And there are some aspects that contribute to this process. Firstly heritage preservation in a village is much stronger than in big cities. Old recipes, traditions and tastes are passing down from old generation to youth. Also special culinary clubs were created, where women can gather together, organize local events with tasting, etc.





Secondly, the popularity of agroecotourism is growing very fast, and each farmstead is trying to attract tourists by something special, including Belarusian dishes. Some farmsteads even have gastronomic specialization.

Thirdly, every year new regional festivals connected with local products or dishes are organized. Good examples could be Motol Delicacies Festival, Cherry Festival, Savior of the Apple Fest Day, Crain and Crainberries Festival.

We expect soon Renaissance of Belarusian cuisine in rural area based on local food and traditions which let people to feel culinary taste of place – “Culina loci”.

“Gastronomy map “Gastinia” case

“Country Escape” is national nongovernmental organization which has been developing rural tourism since 2002, including gastronomic. We have now in Belarus 2263 homestays and farms provided hospitality service and different kind of entertainment and educational programs based on Belarusian heritage. Gastronomy has always been an important component in these kind of activities and point of special interest for visitors. “Country Escape” has a big database of traditional recipes which have been collected during these years and a list of contacts outstanding “local chefs” – homestays owners. They possess a unique gastronomy knowledge and skills; they are willing to share their experience with visitors.

At the same time, we have a lot of people in the city (sort of foodies) including youth who is interested in eating out but don't know too much about Belarusian cuisine.

The project "Gastronomy map "Gastinia" that combined local recipes and information about places and its hosts would help to connect visitors/tourists and food experiences providers.

The goals of the project are:

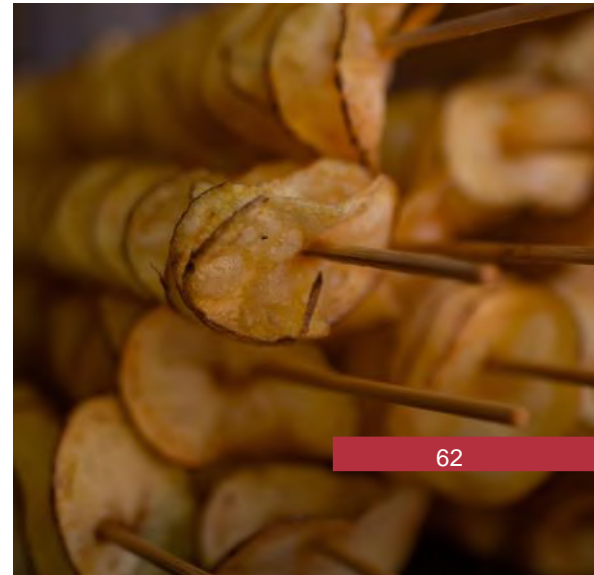
- to rise awareness about Belarusian gastronomy heritage;
- to revive Belarusian gastronomy heritage and provide safeguarding of unique knowledge in this field;
- to involve youth in heritage-based innovation;
- to contribute to national Belarusian people identity development.

For brainstorming we have used a mind mapping – a technique used to map creative thinking around a central idea.

We tried to provide our audience visitors/tourists with unique, entertaining, educational activities that make it possible for them to have a personal connection with gastronomy heritage of Belarus, its people and local culture.

Gastronomy heritage comprises food, recipes, stories, legends, rites, customs, festivals, culinary books, people who know and cook traditional food (bearers of local traditions), etc.

A strong knowledge of resources is essential to present an effective and credible interpretive program/product that is meaningful to visitors. That's why we used a lot of experts in this sphere.





The map has been published already. It contains 200 recipes, contacts of 100 homestays and some stories about the most interesting recipes. It inspires visitors to travel and create their own stories and unforgettable experiences.

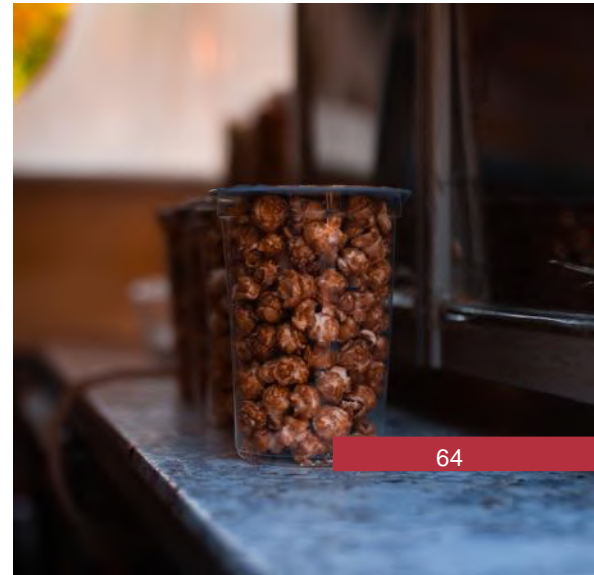
We have developed different kind of promotion tools for this map. Together with students we have organized flash mob in social networks VK (VKontakte) and Instagram under the hashtag #gastinia when young people first have to cook Belarusian dish, then put short video and pass the button their followers and friends. There were few hundreds videos and a lot of interest from the side of young generation.

Another productive idea come from students as well – to take part on prestigious competition Hack4Tourism sponsored by UNDP in Minsk. Our young team became a winner and we have got some money for creation of electronic version of our map – web site gastinia.by with a lot of interactive activities. This site is already working but will be upgraded within one international project “Preservation and promotion of culinary heritage and traditional craft skills”. There are a lot of stories, recipes, interviews, videos, articles, links, etc. on this web site.

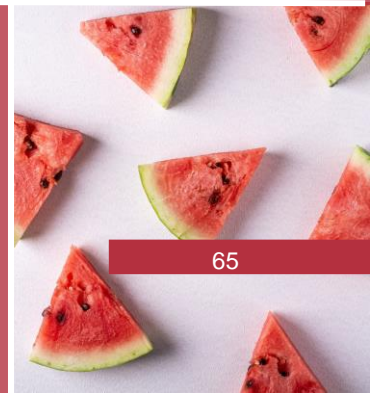
We have got a very good media coverage – TV cooking shows, interviews, articles in magazines, in newspapers, on internet resources. Our young volunteers are taking active part in this process and became celebrities.

Also a group of young IT specialists have contacted us with idea to create apps for Gastinia map available on iOS and Android on a voluntary basis. It supposed to be ready in summer 2020.

We consider this project as rather successful. We hope that in one decade we will see kind of gastronomic renaissance in Belarus and turn our country in destination with rich local traditional food and gastronomic events. The project supposed to enrich and diverse European culinary heritage.



WORK GROUP AND PARTNERS





Per valorizzare un territorio
non basta un'impresa.
Ce ne vogliono tante.

Made4Italy

**Il programma di UniCredit
per la valorizzazione
dei territori e delle risorse
locali.**

unicredit.it

La banca
per le cose che contano.



Messaggio pubblicitario con finalità promozionale. Per conoscere i dettagli del programma consultare il sito unicredit.it

– one foodstep beyond –

Scopri i segreti del **Friuli Venezia Giulia**: siediti a tavola e **gusta i suoi paesaggi e la sua cucina**. Lasciati incantare da una terra dai mille sapori, grazie alla diversità culturale, etnica e territoriale che l'hanno sempre contraddistinta.
Dalla montagna al mare, la regione offre una vasta scelta di prodotti e ambienti, **un patrimonio unico e inimitabile**.



scopri tutti gli itinerari enogastronomici su www.tastefvg.it

FRIULI VENEZIA GIULIA
www.tastefvg.it



per maggiori informazioni



ITALIAN ASSOCIATION OF GASTRONOMY TOURISM

The non-profit **Italian Association of Gastronomy Tourism** was created with the aim of spreading knowledge about food and wine tourism and raising awareness among food and wine operators to open up to the sector, carry out research for innovation in the field of food and wine tourism; expand knowledge of agricultural, culinary and tourist culture in general.

One of the Association's initiatives is the annual drafting of the **Report of Gastronomy Tourism in Italy**: the most complete and authoritative research on the sector which gives a detailed picture of this tourism segment and outlines the main trends in terms of supply and demand .

The Association aims to raise funds to make the goal sustainable over time.

ROBERTA GARIBALDI

Professor of **Tourism Management**

“Food Tourism Research & Trends” - **World Food Travel Association**

Board of **World Gastronomy Institute**

Presidence board of the Italian Society Tourism Science (SISTUR)

Key-note speaker for **UNWTO – World Tourism Organization** on
Gastronomy tourism topics

President **Italian Association of Gastronomy Tourism**



Roberta Garibaldi
EXPLORING • FOOD • TOURISM

RESEARCH COLLABORATORS



ANDREA POZZI



ELENA VIANI



ALESSIA TONSI



ALESSIA CIMMINO



ELEONORA CORNO

SUMMARY

PREFACE

Introduction

P. 2

Scientific committee

3

6

TRENDS 2020

Sustaining gastronomic practices

P. 12

13

Gastronomy: authenticity and innovation

17

Opportunities for successful food tourism experiences

21

AROUND US

Gastronomy tourism in Spain

P. 30

Gastronomy tourism in Thailand

31

Gastronomy tourism in South Africa

38

Gastronomy tourism in Greece

44

Gastronomy tourism in Belarus

50

57

GROUP OF WORK AND PARTNERS

P. 65

SUMMARY

P. 71

AUTHOR: Roberta Garibaldi

ACKNOWLEDGEMENT FOR CONTRIBUTORS: We acknowledge the people with whom it was possible to discuss about gastronomy tourism topics during these years, occasions of exchange and constant enrichment. A special thanks to Andrea Pozzi tireless during his redaction work and to all the component of my team, Elena Viani, Alessia Tonsi, Alessia Cimmino and Eleonora Corno. A special thanks to the member of the scientific committee Carlos Fernandes, Greg Richards, Marcantonio Ruisi and Matthew J. Stone. To Erik Wolf for the fruitful exchange. Thanks to Antonio Balenzano, Clara Benevolo, Fabio Del Bravo, Heidi Lazani, Jose Maria de Juan Alonso, Mariëtte du Toit-Helmbold, Rossano Pazzagli, Mauro Rosati, Wantanee Suntikul and Valeria Klitsounova for their contribution to the volume.

DISCLAIMER ON CONTENT: All the contents have been realized thanks to the cross-checking of different sources. Anyways, as these sources are subjected to changes, contents can report incomplete information or not in accordance with post redaction modifications. Information are reported as they are without any guarantee. We invite readers to communicate eventual notices to info@robertagaribaldi.it.

Copyright © 2020 by Roberta Garibaldi. All rights are reserved. No part of this publication can be photocopied, reproduced, archived, stored or transmitted in any form or medium - electronic, mechanical, reprographic, digital - except in the terms provided for by the law that protects copyright.



Associazione Italiana
Turismo Enogastronomico