

Executive Summary

Introduction

Culinary tourism was identified as an opportunity in the provincial long term Tourism Product Development Plan, which led in turn to the preparation of a Nova Scotia Cuisine and Wine Tourism Strategy in 2004. There has, at the same time, been a growing level of activity in the other complementary areas of winery tourism and agri-tourism in Nova Scotia.

This has led to the current study and report, which presents a number of ‘building blocks’ towards a broadly based approach to agri-tourism and culinary tourism in Nova Scotia. It was commissioned by a consortium of partners, including:

- Taste of Nova Scotia Society
- Restaurant Association of Nova Scotia
- Winery Association of Nova Scotia
- Nova Scotia Association of Chefs and Cooks
- Slow Food Nova Scotia
- Department of Tourism, Culture and Heritage
- Department of Agriculture and Fisheries
- Taste of Nova Scotia Quality Foods
- Destination Halifax

The Economic Planning Group was retained to lead the project, assisted by McQuinn & Company Marketing and Hanspeter Stutz of Domaine de Grand Pré.

Objectives

The objectives of the project were defined in the Terms of Reference as follows:

- To research and create definitions for culinary tourism and agri-tourism;
- To establish criteria outlining the elements required to create culinary tourism and agri-tourism experiences;
- Based on the definition and required elements, create an inventory of existing culinary tourism and agri-tourism experiences in Nova Scotia;
- Research and determine the economic impact of culinary tourism and agri-tourism on provincial tourism as a whole;
- Develop tools and conduct assessments of the existing culinary tourism and agri-tourism product to determine its overall state of market readiness.
- Identify any existing gaps, areas for improvement and potential opportunities.

Early in the process it became evident that, for a variety of reasons, some pieces of these objectives were not realistically achievable. Several changes in the scope of work were proposed and accepted by the Steering Committee.

Specifically:

- The inventory of culinary tourism establishments would be limited to a list of potential initial candidates that might meet the identified criteria.
- It was not possible to obtain the data needed to determine the economic impact of culinary tourism or agri-tourism. Instead, it was agreed that a methodology for obtaining this information in the future would be developed instead.
- Additional tasks were added to the work program, including:
 - Preparation of a strategic framework including:
 - Recommendations on potential areas for market development
 - Recommendations on the next steps to be taken
 - Describe the key elements of a realistic action plan to pursue the opportunities
 - Explore the scope of the future potential of the market opportunities in terms of visitation, revenues and economic impacts
 - Prepare an implementation framework

Recommended Definitions

Agri-tourism

This includes experiences associated both with farms and with the fishery. It might be appropriate to use the word fishery-based tourism to differentiate these experiences from those associated with agriculture.

Proposed Definition

Visitor experiences of quality, associated with a farm or fishery, and/or with the growing, harvesting, processing or sale of Nova Scotia agricultural or fisheries products.

Proposed Categories

- ***Farm attraction*** (historic farm, demonstration farm, petting farm, farm wagon/sleigh tour, horseback riding, corn maze, gardens)
- ***Agricultural/fisheries theme attraction*** (museum/interpretive facility, exhibit, demonstration, interpretation, learning program)
- ***Agricultural/fisheries processing plant tour***
- ***Farm accommodation*** (incl. farm vacation package)
- ***Agricultural/fisheries theme tour, route***
- ***U-Pick/U-Fish***
- ***On-farm market/shop or fishery retail, e.g. lobster pound***
- ***Community farmers' market***
- ***Agricultural/fisheries festival/special event***

Winery Tourism

Wine-related activities and experiences do not have to take place at the winery to be considered winery tourism. For example, a tasting or a Nova Scotia wine theme event in Halifax could be considered winery tourism.

Proposed Definition

Winery experiences of quality, showcasing Nova Scotia's wines.

Proposed Categories

- *Winery tour/tasting, vineyard tour*
- *Wine learning/appreciation package*
- *Wine theme event*
- *Wine route, tour*

Culinary Tourism

Proposed Definition

Culinary experiences of quality that are uniquely representative of Nova Scotia's culture, heritage, lifestyle and/or food and make extensive use of Nova Scotia grown/harvested foods and ingredients.

Proposed Categories

An unresolved issue is whether categories of dining establishments are necessary or helpful. With the rigorous kinds of standards proposed, having categories may not be all that important. All of them could be branded 'Quality Dining' or something similar. However, in the event categories are preferred, the following suggestions are offered:

Restaurants

- *Fine Dining* – high quality of dining and service
- *Casual Dining* – quality dining and service
- *Traditional Dining* – quality dining that features traditional Nova Scotia menus and foods
- *Special Mention* – unique culinary experiences of quality that do not fit the foregoing categories but that nevertheless offer a unique Nova Scotia experience

Non-Restaurant Categories

In addition, there would be several non-restaurant categories that fit under culinary tourism/experiences:

- *Culinary theme tour, route*

- **Culinary theme package** (e.g.: learning)
- **Culinary theme event or festival**
- **Culinary theme attraction** (e.g.: dinner theatre)

Specialty Food Outlet

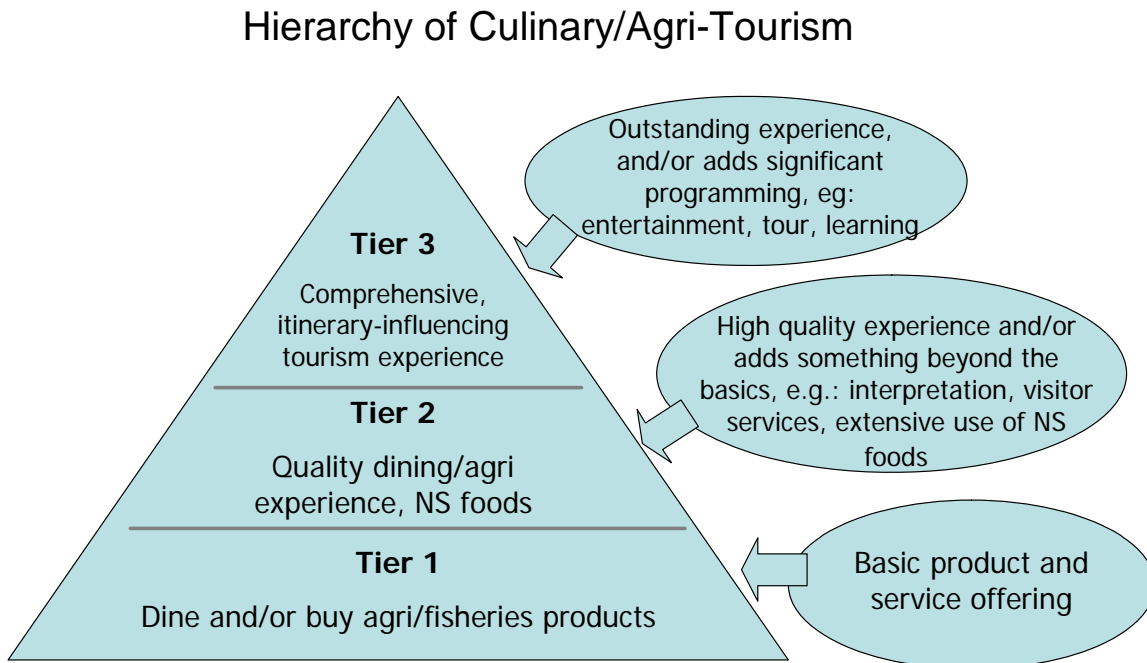
We are proposing another category – Specialty Food Outlet so as to encompass retail outlets that feature Nova Scotia foods but are not farm markets. An example might be the Pork Shop in Colchester County. The definition would be as follows:

Nova Scotia retail outlet of quality, featuring Nova Scotia foods and food-related artisan products.

The key requirement is that the shop features Nova Scotia produced foods and food-related artisan products.

A Hierarchical Approach to Agri-tourism and Culinary Tourism

Clearly, not every farm or fishery is considered agri-tourism and not all agri-tourism experiences are attempting to be at the same level in terms of the scope and intensity of the experience offered to the visitor. Similarly, not all restaurants are positioned to offer culinary tourism experiences. We suggest that there is a hierarchy of experiences based on the scope, level of intensity and the level of interpretation/learning that is offered. This hierarchy, which would apply to both agri-tourism and culinary tourism, is illustrated below:



It is recommended that the focus of efforts to develop and market agri-tourism and culinary tourism experiences be on the more extensive and intensive experiences, those that fit into Tier 2 or 3. The market-readiness assessment would be used to determine into which tier the product or experience fits.

It is recommended that the Tier 2 standards be the minimum to qualify for ‘accreditation’, allowing participation in the marketing alliance and other programs described in this report.

Tier 3 would designate an ‘outstanding experience’ for agri-tourism establishments, and, with restaurants, it would indicate an exceptionally high level of quality of food, service and overall dining experience. We are proposing that there be an ‘Award of Quality’ for Tier 3 establishments.

These Tier 2 or Tier 3 types of experiences would appeal to both local/regional markets as well as to domestic and out-of-province tourists. However, they would be much more likely to appeal to tourist visitors and to influence their trip and travel patterns than the more basic ‘eating out’ or ‘farm gate’ experience.

Recommended Standards

Agritourism

It is recommended that the standards would be divided into three sections, each encompassing a series of market readiness criteria:

- Essential Standards
- Preferred Standards
- Other Quality of Experience Features

Essential Standards

- Legal and regulatory requirements
- Health and safety requirements, including a risk management plan
- Provides a Nova Scotian agricultural or fisheries-related visitor experience
- Provides a quality experience
- Provides quality customer service
- Is clean and in a good state of repair
- Provides an authentic experience
- Provides an orientation to the site and the experience

Preferred Standards

- Has a property that is readily accessible to visitors
- Makes an effort to market the experience to visitors
- Makes an effort to be part of the tourism industry
- Makes an effort to minimize environmental impacts

Other Quality of Experience Features

We are proposing that the features in this section be used to determine whether an agri-tourism operation meets the requirements for the Tier 2 accreditation level, or the Tier 3 Award of Quality level. These include things such as the provision of interpretive information, demonstrations or a structured learning program, opportunities to become personally engaged in the functions of the operation, etc.

Standards will need to be developed for festivals and special events, since they don't fit the same model as do the other agri-tourism categories.

Winery Tourism

The following criteria would be employed to accredit wineries:

Essential Standards

- Offers tasting
- Public parking
- Public washrooms
- Highway and on-site signage
- Retail sales of wines
- Quality customer service

Preferred Standards

- Guided tours of the winery
- Staff trained in wines, winemaking, regional produce/cuisine, area attractions and tourism services
- Makes an effort to market the experience to visitors
- Makes an effort to be part of the tourism industry

Culinary Experiences

The proposed market readiness criteria for restaurants are as follows:

Essential Standards

- Business must be independently owned and operated, with a menu developed independently for the establishment
- Business has liability insurance
- Trained staff, including a combination of:
 - Formal culinary training
 - Skills training
 - Training in safe food handling techniques
 - Hospitality and service training
- Has a commitment to using Nova Scotia foodstuffs and wines featuring them on menu items

- Provides quality food and beverage
- Provides quality customer service
- Is clean and in a good state of repair

Preferred Standards

- Makes an effort to market the experience to visitors
- Makes an effort to be part of the tourism industry
- Makes an effort to minimize environmental impacts
- Has appropriate interior décor

It is recommended that restaurants would have to meet the requirements for all of the essential market readiness standards and 50% of the preferred standards in order to meet the Tier 2 accreditation level.

To be eligible for consideration for the Tier 3 Award of Quality, restaurants would need to achieve a higher rating with respect to quality of food and beverage, quality of customer service and quality of premises.

Standards will need to be developed for the non-restaurant categories of culinary tourism, including; culinary theme tour/route, package, event/festival, and attraction.

The Strategic Approach

Both Nova Scotia's Vision for Tourism, which is guiding the Province's priorities, and the 2006 Tourism Plan, have identified culinary tourism as a sector offering growth potential for the province. Furthermore, 'quality', 'experiences' and four-season tourism loom large in these plans, all of which figure prominently in the culinary and agri-tourism agendas.

There are clearly opportunities to advance the agenda in culinary tourism and agri-tourism; and in other complementary areas as well. What are needed are 1) marketable products, 2) focused marketing programs, and 3) the implementation model to move forward, which is not really in place today. Some pieces are there, but there is no effective linkage or coordination. And there are large pieces missing altogether. We need a new framework and approach.

The proposed strategy would involve the following initiatives:

1. Develop and support a 'culinary experiences' program, of quality experiences for both residents and visitors.
2. Develop and support an agri-tourism program, of quality experiences for both residents and visitors.
3. Build on winery tourism.
4. Build on the quality foods program.
5. Develop and support a quality assurance system for the 'family of Nova Scotia food-based products and experiences' in support of the foregoing.
6. Develop and support a collaborative marketing system in support of the foregoing.

7. Mobilize the network of stakeholders in the ‘family of Nova Scotia food-based products’ to pursue their common interests in quality standards and collaborative marketing.
8. Build relationships between the various players in the distribution chain, such as local producers dealing with restaurants.

In summary, the following four elements are required:

1. Initiatives to develop quality experience products
2. Quality assurance program(s), with ‘accreditation’ of those meeting the standards
3. Collaborative market awareness-building, and marketing of products of accredited enterprises
4. An organizational model to deliver

It will be important that the departments of Agriculture and Fisheries and Tourism, Culture and Heritage, as well as ACOA, support the effort to launch and firmly establish the broadly-based program proposed in this report.

Product and Program Development

The overall approach should focus on a ‘programming overlay’ to the basic products on offer, accomplished through:

- Packages
- Suggested itineraries for consumers presented in various ways – website pages, trip planner/guidebook, brochure
- Tours, both guided and self-guided
- Festivals and special events

As well, culinary experiences and agri-tourism offer opportunities to present different experiences in each season, linked to seasonal foods, culinary traditions, harvests, etc.

Several new opportunities have been identified, including a suggestion made by Brian Kienapple, Leader, Slow Food Nova Scotia, to establish Wolfville as the first Slow Food community in North America. Professional development also needs to be a focus of future activities. Other areas of support recommended for the product development effort include:

- Establish a Nova Scotia producer distribution network to facilitate the movement of local/regional produce to restaurants and specialty food outlets in the province
- Build partnerships between producers and chefs through a semi-annual producer showcase event
- Develop an insurance program for accredited agri-tourism establishments
- Develop highway signage for agri-tourism attractions, and sign themed agri-tourism and winery touring routes

Market Development

The culinary experiences, agri-tourism, winery tourism and specialty retail sectors all have a common interest in marketing directly to consumers. The Quality Foods members that don't deal with consumers directly have a common interest in marketing to restaurants, retailers and organizations involved in the food distribution system. As a result, there would continue to be programs designed for both.

The following areas for market development are seen to be important:

- Branding, positioning and awareness
- Targeted programming and marketing – consumer and group markets, in-province and tourism segments
- Packages, itineraries, tours
- Events
- Learning
- Four seasons of products
- Linkages to the meetings and convention markets, and other group markets

There is a need for a collaborative organizational model to move such initiatives forward, which is discussed later below.

There is also need for a branding and communications strategy to be developed as part of the overall market development effort.

The Quality Assurance Program

The proposed features of this program would build on the standards presented earlier, using them as a basis for the accreditation of establishments, thereby allowing them to participate in collaborative marketing programs. We recommend the focus be on consumers generally, with programs that focus on both resident and tourism markets, as well as some that focus specifically on tourism markets.

Based on the three-tiered model presented earlier, tier 2 standards would be required for accreditation for culinary and agri-tourism establishments. Those achieving tier 3 standards would also be given a 'quality award', involving a differentiated logo, and being showcased in marketing initiatives.

The main report presents the assessment forms that are being proposed for culinary and agri-tourism. Others will need to be developed for the wineries, specialty retail outlets, festivals and events and some of the other sub-sectors.

The delivery method would involve a self-assessment by the establishment, then an application for accreditation, followed by one or more mystery shops, followed by one-on-one counselling, and finally accreditation of the establishment. The inspectors will need to have some considerable professional qualifications in their respective program areas. This is particularly critical for the restaurant sector.

With respect to the ‘Award of Quality’, in the case of culinary establishments, we suggest that the mystery shop inspection would identify candidates for the quality award but not make the award directly. It is recommended that a peer group of restaurant and culinary professionals then review the culinary nominees, perhaps with a further visit to the establishment and then confirm the award.

All such awards would expire after one year.

A Collaborative Delivery Model

From Silos to Collaboration

While there are differences in agendas among the various stakeholder organizations and differences in market focus as well, there are also major overlaps too. And it is clear that there is a common interest among them in putting each of the four building blocks in place. It is evident as well that there is a considerable level of support for taking an integrated approach to the effort.

The proposals to follow could be pursued in one integrated effort, or in stages and phases.

The elements of the proposed approach include programs in all of the following categories:

1. Culinary experiences and culinary tourism
2. Winery tourism
3. Agri-tourism
4. Quality foods – specialty retail outlets/markets
5. Quality foods – distribution system and export

A New Model for the Taste of Nova Scotia

We propose that the Taste of Nova Scotia Society and the Taste of Nova Scotia Quality Foods program be integrated into one organization and that the business model be further re-engineered to become the delivery organization for the broader five program stream effort. The result would be a new organization, structured in a very different fashion.

The new organization would develop and deliver the quality assurance programs for the different types of enterprises involved. And it would establish partnerships with the different stakeholder organizations and, on their behalf, facilitate and coordinate marketing alliances of accredited establishments. Both members and non-members of these other organizations would be eligible to participate once they become accredited.

The Taste of Nova Scotia Society’s culinary marketing program would merge into the culinary experiences program discussed in this report. Restaurants participating in the Taste of Nova Scotia culinary marketing program would need to achieve the new accreditation standards to become members, and the quality award recipients would also be showcased in the Taste of Nova Scotia’s activities.

The Board of Directors of the re-designed organization would be made up of representatives from the accredited establishments in each of the five categories, along with appointed representatives from the partner organizations, including the Restaurant Association of Nova Scotia, the Nova Scotia Winery Association, Cooks and Chefs Association, Department of Tourism, Culture and Heritage, Department of Agriculture and Fisheries, and perhaps two or three knowledgeable consumers as well.

The organization would have five program streams, involving both quality accreditation and cooperative marketing in each case. The model is illustrated on the following page.

We propose that the existing Taste of Nova Scotia brand be used for the program as whole, accompanied by seven sub-brands, one for each of the categories of establishments. (A review of the branding and communications strategy should be one of the early tasks.)

Proposed New Model for the Taste of Nova Scotia Society

Taste of Nova Scotia Board of Directors (stakeholder organizations and representatives of accredited partners from each category)				
Roles of the Organization Quality assurance program and quality experience accreditation Consumer awareness marketing Coordinate the marketing of accredited establishments in each program stream below				

Program Streams

Culinary Experiences Marketing Committee	Winery Experiences Marketing Committee	Agri-tourism Experiences Marketing Committee	Specialty Food Retail Marketing Committee	Quality Foods Marketing Committee
Clients/Partners				
Restaurants and other foodservice establishments	Wineries	Agriculture/ Fisheries-based establishments	Retail outlets specializing in NS food & artisan products	Producers, processors, distributors, retailers

The linkages with the stakeholder organizations would be worked out on a case-by-case basis and confirmed in letters of agreement.

Next Steps in Pursuing the Proposed New Model for the Taste of Nova Scotia

We recommend a presentation of this report be made to the Boards of the four key stakeholder organizations as a first step.

Implementation of the proposed organizational model should then proceed with the following priority steps, under the direction of a new Steering Committee:

1. Form the Steering Committee to move the project ahead.
2. Confirm general agreement with the initial concept with the proposed core stakeholder partner organizations.
3. Develop terms of reference for the working group, building on the proposals provided in this report, including technical/advisory support requirements (legal, consulting, communications, etc.), and a budget for this, as well as for the process as a whole.
The issues to be addressed include:
 - a. Roles of the new organization, and the scope of activities
 - b. Phasing of implementing each of the program streams
 - c. Organization structure – Board, staffing
 - d. Standards required for accreditation in each program stream (This needs a sub-committee or separate group to address this, building on this report’s base models for culinary and agri-tourism)
 - e. Types of marketing-related programs to be undertaken and/or supported and the TNS model for facilitating them
 - f. Branding and communications strategy and its specifics, including categories of products
 - g. Relationship with accredited establishments, including fees
 - h. Relationships with stakeholder organizations, and features of memoranda of understanding (MOUs) with them
 - i. Three year business plan and budget
 - j. Funding model
4. Secure a budget from the two provincial government partners and ACOA to support the foregoing.