



# **Staying in Wales Limited**

Response to:

## **Integrated Food Tourism Action Plan for Wales: Consultation Paper**

26th March 2007

## **Background to Staying in Wales Limited**

Staying in Wales Limited was established in 2003 in the wake of the foot and mouth epidemic to sustain the work and good practice of the Taste of Wales–Blas ar Gymru initiative, discontinued by the Welsh Development Agency Food Directorate.

Much of the good practice and investment was in the adaptation of information communication technologies (ICTs) to deliver information to visitors on points of interest in Wales using geographic information (GI). This was recommended in 1996 in the original blueprint for a Wales destination marketing system.

Developments have been maintained throughout in collaboration with the Welsh Food Directorate, Welsh Rarebits, Wales Great Little Places, Youth Hostels Association, Welcome Host, Visit Wales, Countryside Council for Wales, Cadw, the National Trust in Wales, RSPB Cymru and Sustainable Transport for Tourism Wales (STTW). A number of beta projects involving GI-embedded ICTs are under development as part of this collaboration.

Staying in Wales seeks to complement the work of Visit Wales within DEIN and the Food Division within DEPC in developing the visitor economy in Wales and substantially increasing its contribution to 'Wales Plc'.

## **Consultation Questions and Responses**

### **1) What are the strengths and weaknesses of the food offering in Wales?**

#### STRENGTHS

- Association with landscapes and countryside
- Authenticity
- Freshness
- True taste
- Close-to-organic nature of hill farming
- Salt-marsh grazing lands
- Well-established regional products and recipes
- EU protected geographical indication for Welsh lamb and Welsh beef
- Quality restaurants and other eating places
- Indoor markets
- Well-established food festivals and agricultural shows
- Increasing numbers of farm shops and farmers' markets
- A growing farm-direct-to-consumer internet industry
- A well-established government food directorate
- Good supply-end development support
- True Taste Wales Food and Drink Awards
- An Action Plan for the Countryside Experience that already embraces:
  - distinct Welsh culture and heritage

- local food
- enjoyment of the natural environment
- villages and market towns
- restaurants, cafés, tea rooms and pubs, and
- shop and other retail outlets

## WEAKNESSES

- Lack of a coherent food tourism strategy
- Lack of integration into the tourism marketing mix
- Early institutional malaise in promoting Welsh food tourism products
- No effective satellite accounting to measure food tourism-related outcomes
- Underutilisation of new media for consumer research, direct marketing and tracking results
- Friction between quality suppliers seeking exclusivity and high added value, and supermarkets seeking inclusivity at low supplier margins.

### **2) How can we encourage the development of quality within the sector?**

By communicating clearly to producers the market returns available through the development of quality foods, quality food brands and shortened food chains using case histories that demonstrate this. See also 'Wales the True Taste' at <http://www.wda.co.uk/index.cfm/en3200>

### **3) How should we achieve an increase in awareness of the variety, range and quality of the food & drink offering,**

#### **(a) within the industry?**

A well-promoted and well-maintained online directory of food and drink suppliers in Wales, including farm shops, farmers' markets and food festivals; accessible to retailers, hospitality providers and marketing organisations for Wales.

#### **(b) amongst visitors?**

Through timely, well-planned online promotion of food festivals, farm shops, farmers' markets across Wales as part of Wales annual calendar of events, integrating local hospitality providers i.e. accommodation, restaurants and visitor attractions that source food locally.

Food and drink is an important part of the total visit experience; integrating it into the full mix of opportunities for visitors is vital. So too is an appreciation that the visitor market, at destination, is an itinerant one and functions differently to the domestic market. As a result it requires an innovative approach, different both in time and space to domestic market communications.

#### **4) How can closer links across the food chain be developed, including producers, manufacturers, wholesalers and retailers?**

In terms of the visitor market it's more a question of shortening the food chain (from farm to plate) so that visitors gain a greater appreciation of the authenticity, freshness and true taste of food from Wales. This also embraces post-visit online ordering and postal fulfilment of authentic Welsh products, barbecue- and oven-ready cuts of Welsh lamb is one example but there are many more.

#### **5) Historically within the food tourism industry in Wales, what do you consider have been**

##### **(a) successful initiatives to date and why?**

##### **(b) unsuccessful initiatives to date and why?**

Most of the initiatives, both local and national, have been successful to some degree but all have been affected by there having been no food tourism strategy in place to speak of. As a result a number have not been mainstreamed and have failed to achieve the overall success they might have had. Taste of Wales–Blas ar Gymru was one such, although after a number of incarnations there were other reasons for its ultimate demise.

Much can be learnt from the history of this well-intentioned scheme and there is much to build on. It would be a mistake to start with a clean sheet altogether. The Taste of Wales concept was a good one. It managed to recruit over 500 hospitality providers to the cause in Wales but failed ultimately to deliver product to market. There were two reasons for this.

##### *1. Structural*

The Taste of Wales scheme was from time-to-time a Wales Tourist Board–Development Board for Rural Wales–Welsh Food Promotions–Welsh Development Agency initiative that didn't quite mesh with the marketing and promotional strengths of a Wales Tourist Board whose leading brief was to develop quality-graded accommodation and promote activity tourism.

Yet expenditure by visitors on food and drink is almost equal to the amount they spend on overnight accommodation and represents a potential year-round market worth more than the tourism industry itself. In addition it represents substantial opportunities for farm diversification, added value farm products, and rural regeneration where farms are often central to sustaining community life, culture, crafts, traditions and the Welsh language – all key priorities for the tourism sector enshrined in the 2000–2006 Rural Development Plan for Wales.

In addition the Common Agricultural Policy (CAP) reforms promotes the concept of farmers becoming stewards of the landscape that is so attractive to visitors. The role then of the Countryside Council for Wales became crucial in these matters.

##### *2. State Aid Regulations and EU Competition Directives*

Regulations and directives such as these augur against government-funded agencies working too close to market where the ultimate aim is to generate sales and profit. Uncertainty on these

issues was aggravated by separate pools of knowledge (sometimes incomplete) operating within the different agencies. Rather than run the risk of trouble further down the line the pace of development was slowed down whilst legal advice was sought and in the case of Taste of Wales developments were terminated completely.

It was, however, an important learning process and with a single department within the Welsh Assembly Government now focusing on these issues, more innovative approaches are being taken that can operate successfully within the rules.

## **Conclusion**

Aspiring to a food tourism strategy is more complex than meets the eye.

It's worth reflecting on the words of Wynfford James, ex-Development Director of the Welsh Development Agency Food Directorate who said, "The culture of food in Wales, traceable back to the 15<sup>th</sup> century and developed in rural areas, reflects the development of our society as a whole. We need to look at the bigger picture"

With so much at stake it would not be wise after 500 years to rush it, particularly when there is so much recent history to learn from and a welter of research and case histories available on the subject over the last twenty years.

If a food tourism strategy is to have any sustainable long-term socio-economic benefit for Wales then all the organisations mentioned in this response need to sign up to it and collaborate below the line on its delivery.

In addition, Hybi Cig Cymru – charged with the responsibility of developing and promoting Welsh lamb, beef and pork for consumption worldwide – have a major role to play. They have been instrumental in gaining the highly prized EU Protected Geographical Indication mark for Welsh lamb and Welsh beef so there is much again to build on.

The main objective of a tourism food strategy must surely be to turn holiday visitors into year-round consumers of Welsh products to the benefit of farming communities in Wales and other communities that assist in bringing the products to market.

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## **Contact Details**

Aros yng Nghymru

### **Staying in Wales Limited**

Unit 4, Parc Busnes Penamser, Porthmadog LL49 9GB, Wales UK

**Tel:** 01766 543011

**Email:** [info@stayinginwales.com](mailto:info@stayinginwales.com)

**Web:** [www.stayinginwales.com](http://www.stayinginwales.com)

**Contact:** Terry Jackson

**Mobile:** 07770 574130

**Email:** [terry@stayinginwales.com](mailto:terry@stayinginwales.com)



Aros yng Nghymru

**Staying in Wales Limited**

Uned 4, Parc Business Penamser, Porthmadog LL49 9GB

*Cofrestrwyd yng Nghymru a Lloegr Rhif 4969289*