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6.1 INTRODUCTION

This chapter presents the results and interpretation of the three datasets collated in this study, namely: data collected from the DMOs; expert opinions from the experts in the field of food tourism destination marketing; and data collated for the culinary database, FOODPAT integrated with the data from TOURPAT. These formed the basis of the situational analysis regarding food tourism in South Africa and contributed to the compilation of the SWOT profile. The internal and external analysis included the components as outlined in Figure 6.1 and was based on the data collated from the Stakeholder Survey, Expert Opinion Survey, FOODPAT and TOURPAT.

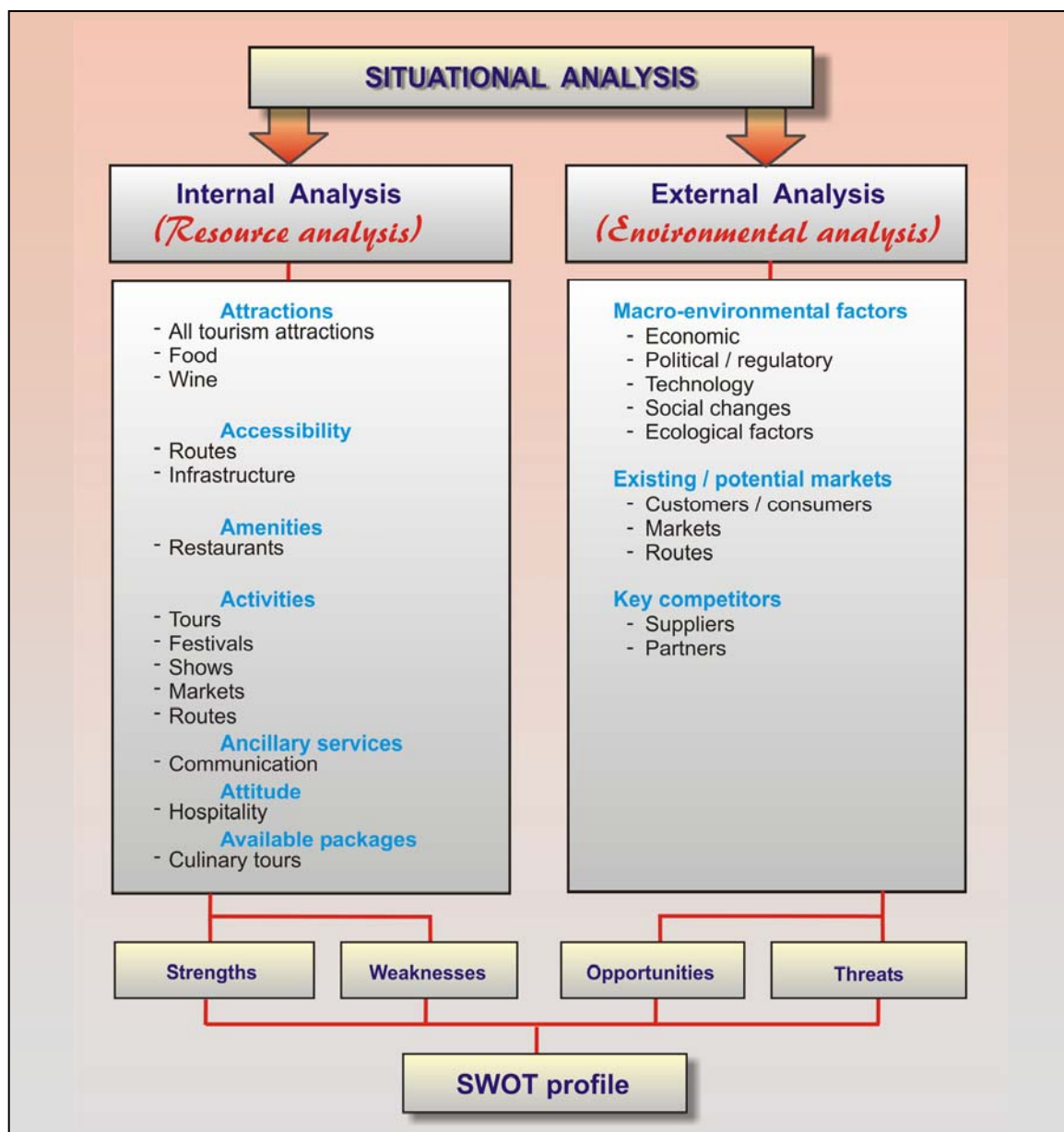


Figure 6.1: Outline of the components of the situational analysis performed

The integration of these results provided the rationale for the development of the Strategic Food Tourism Destination Marketing Framework, the selection of the case study, and the formulation of guidelines and recommendations pertaining to the development and implementation of food tourism in destination marketing strategies by DMOs and other stakeholders in food tourism. The geographical distribution and response rate of the target population is given. The status of food tourism as a destination attraction is discussed and the situational analysis regarding food tourism in destination marketing is presented and interpreted. The results of the expert opinion survey and the culinary database, FOODPAT are recorded after which the data is holistically interpreted to generate the SWOT profile and prepare for the selection of the case study and the implementation of the Strategic Food Tourism Destination Marketing Framework. Finally, food tourism in destination marketing is evaluated according to the food tourism destination marketing framework with specific reference to food tourism enhancers.

6.2 PROFILE OF RESPONDENTS

Since the major focus of this study was a situational analysis on the use of local and regional food in destination marketing, the target population were provincial and regional DMOs in South Africa. The response rate and geographical distribution of the respondents is important for this study as it reflects the representation of the provinces and tourism regions.

6.2.1 Response of Target Population

A total of 112 questionnaires were returned from the 246 questionnaires that were electronically mailed to all the DMOs. All returned questionnaires were found to be usable, were coded and incorporated in the data analysis procedures. An overall response rate of 45.5% was thus obtained. Table 6.1 provides a breakdown of the response rate for each of the nine provinces included in the data analysis. The questionnaires received from each of the provinces reflects a computed total of responses from the provincial office, the regional offices in the specific province and the local offices in each of the regions in the province, thus the sum of V76+V77+V78 = number of responses for each province.

Since this study is exploratory-descriptive in nature, the response rate for each province is a reflection of the extent of information available for each province regarding the use of local and regional food in destination marketing.

Table 6.1: Reflection of the response rate per province, region and local DMOs

PROVINCE	V76 Province n	V77 Region n	V78 Local n	Total: V76+77+78 n	Total Responses n	Response Rate %
Gauteng	1	6	3	10	7	70.0
Eastern Cape	1	6	19	26	17	65.3
FreeState	1	4	8	13	7	53.8
Mpumalanga	1	8	15	24	12	50.0
Western Cape	1	8	80	89	41	46.0
Northern Cape	1	6	8	15	6	40.0
KwaZulu-Natal	1	8	30	39	15	38.4
Limpopo	1	4	16	21	5	23.8
Northwest	1	5	3	9	2	22.2
TOTAL	9	55	182	246	112	

The inclusion of DMOs at provincial, regional and local level is justified, as the higher the number of responses for each province, the more valid the results, which allows for better analysis and reporting. Furthermore, in this study, the local offices in each region form an entity representing the whole region. Data analysis is portrayed at:

- National level, which entails a computation of the total target population, i.e. n=112.
- Provincial level, which entails a breakdown of the data in the nine provincial areas and constitutes a computation of the regions in every province.
- Regional level, which entails a breakdown of the data in the 55 tourism regions and constitutes a computation of the magisterial districts in every region, which ultimately contributes to the extraction of relevant data to verify the selection of the region for the case study.

The reasons for non-response are unfortunately unknown, but should be considered when integrating the various datasets, as the lack of resources may well be the reason why a region responded poorly. The data reflected in the culinary database was sourced from secondary data sources and is not influenced by the response rate of the various tourism regions.

6.2.2 Geographical Distribution and Representation of Respondents

The geographical distribution and representation of the study group is important as it provides a reflection of the geographical area being represented in the situational analysis and it also verifies the validity and reliability of the data received, thus the higher and geographically wider the representation the more valid the analysis and reporting. The distribution and representation of the 112 responses received are as follows:

- On a provincial level – all **nine** provincial offices returned their questionnaires;
- On a regional level - **43** of the 55 regions returned their questionnaires; and
- On a local level - **60** of the 182 local offices returned their questionnaires.

Questionnaires were returned from each of the nine provinces, which facilitated a description and situational analysis of South Africa as an entity. The regional response of 43 regions out of the 55 reflects a response rate of 78%, which is excellent and allows for additional in-depth analysis and description of the regions. The local response rate of 60 out of 182 local offices, 33%, allows adequately for identification of regional difference and also verifies provincial and regional trends established from data collection and analysis. The graphical representation of the compilation of provincial and regional data in Figure 6.2 was based on sequence ranking from highest to lowest values according to the number of responses, so as to give an overall picture of the spatial variation to the questionnaire

A map (Figure 6.2) depicts the geographical distribution and representation of respondents nationally, provincially and regionally. The information regarding the response rate and geographical distribution of the respondents is important as it impacts on the integration of the three datasets where the amount of information known about an area will allow for a more in-depth situational analysis. Such information will determine the potential for food tourism in a destination more accurately.

6.3 CURRENT STATUS OF FOOD AS AN ATTRACTION

Descriptive statistics describe the general characteristics of a set or distribution of scores (Jennings, 2001). Frequencies and means are the descriptive statistics used in discussing the distribution of responses gathered during the quantitative component of this study. In the context of this study, frequency refers to the number of times a response was given to a specific question (variable) regarding food as an attraction in a destination, and is presented in Section 6.4.

The use of descriptive statistics in displaying frequency distribution makes data more comprehensible. Graphical presentation of the data in the form of stacked bar graphs, histograms and pie charts allows for the recognition of trends and patterns, Veal (1997), agrees that this techniques facilitates presenting the situational analysis of the various tourism regions in a comparable manner.

for the country as a whole in comparison with other tourist cards. The final product is thus a snapshot of the destination regarding the marketing of food tourism as an attraction in terms of available resources, identification of gaps and constraints and the actions and strategies required to address the gaps and constraints. This information is integrated with the data in FOODPAT and TOURPAT in Section 6.7 with the aim of providing a more comprehensive profile of food tourism in South Africa.

6.3.1 Relative Position of Food as an Attraction / Attraction Status

A focus of this study was to determine the position of food as an attraction in comparison with the other tourism attractions in the various tourism regions. This is also presented for each province and nationally. Maps (Figure 6.3) portray the status of various key and all supportive attractions spatially at national, provincial and regional level.

The stacked graph in Figure 6.4 presents the frequency distribution graphically in the form of percentages for all respondents (n=112) giving an image of the position of food as an attraction in relation to other attractions represented in South Africa. Figures 6.3 and 6.4 confirm the perceptions that South Africa is best known for its nature-based attractions (71.8%), followed by cultural (62.2%) and outdoor and recreational activities (55.1%). The high score of cultural/historical attractions provides local and regional food with an additional opportunity to be promoted as a tourism attraction, as food is part of a destination's culture, through its culinary heritage (Bessiere, 1998; Boniface, 2003; Cusack, 2000; Government of South Africa, 1996; Hegarty & O'Mahony, 1999; Long, 1998; Ohlsson, 2000; South African Tourism, 2004).

Figure 6.5 is a collage of the nine provinces given against the scores of the country as a whole, regarding the relative position of food as an attraction. The provinces of Limpopo and North West have a response rate below 30%, therefore the reflection of their attraction status is not adequate for analysis and further reporting. Provincially the position of food as a key attraction is present in five of the nine provinces, whilst food features as a secondary attraction in all of the provinces. The results compare well with what is reported in the literature, namely that food is not primarily a key attraction (17.9%) but fares much better as a supportive attraction (36.6%), (Cohen & Avieli, 2004; Du Rand, Heath & Alberts, 2003; Hall, 2003).

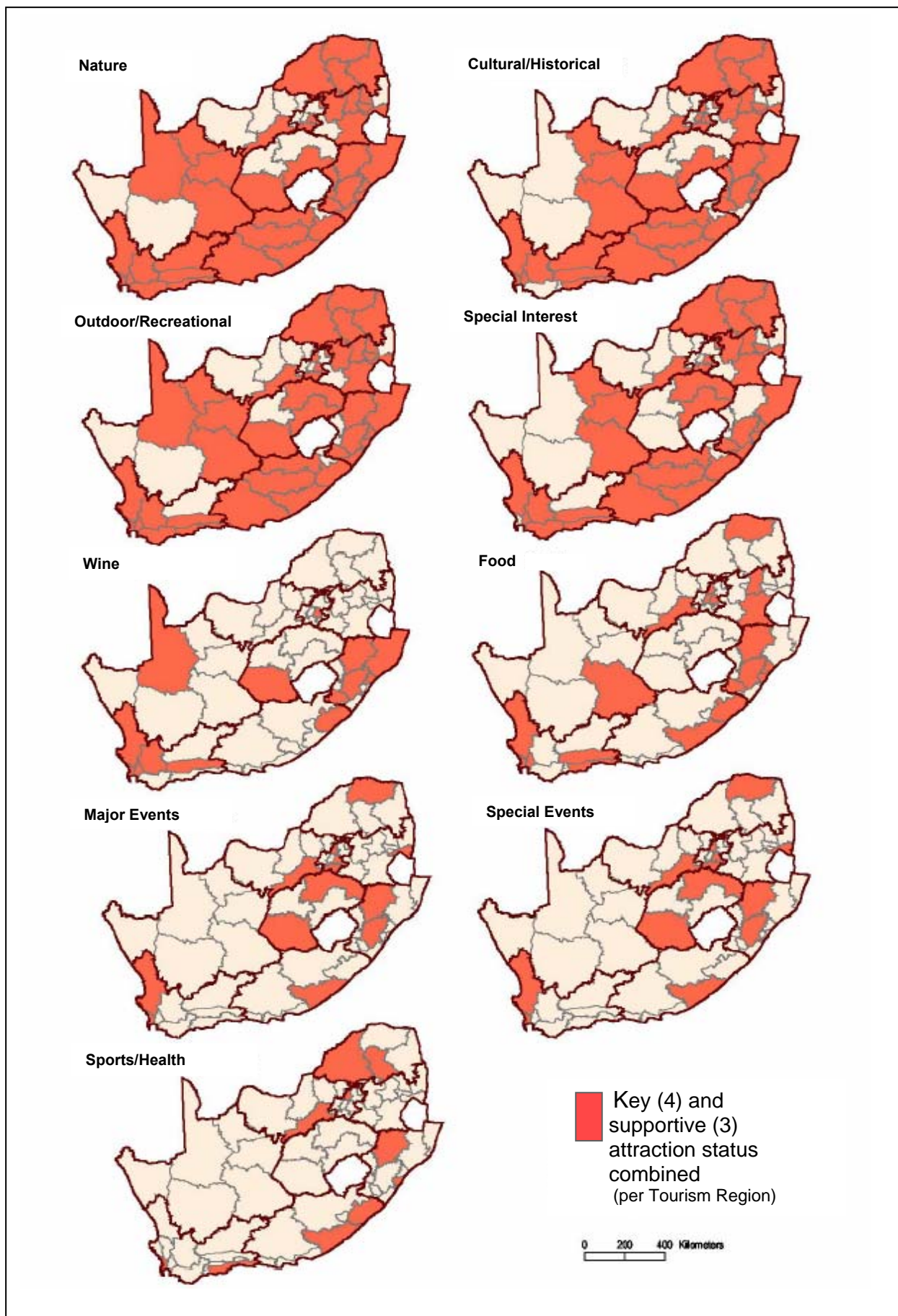


Figure 6.3: Key and supportive attraction status on a national, provincial and regional level

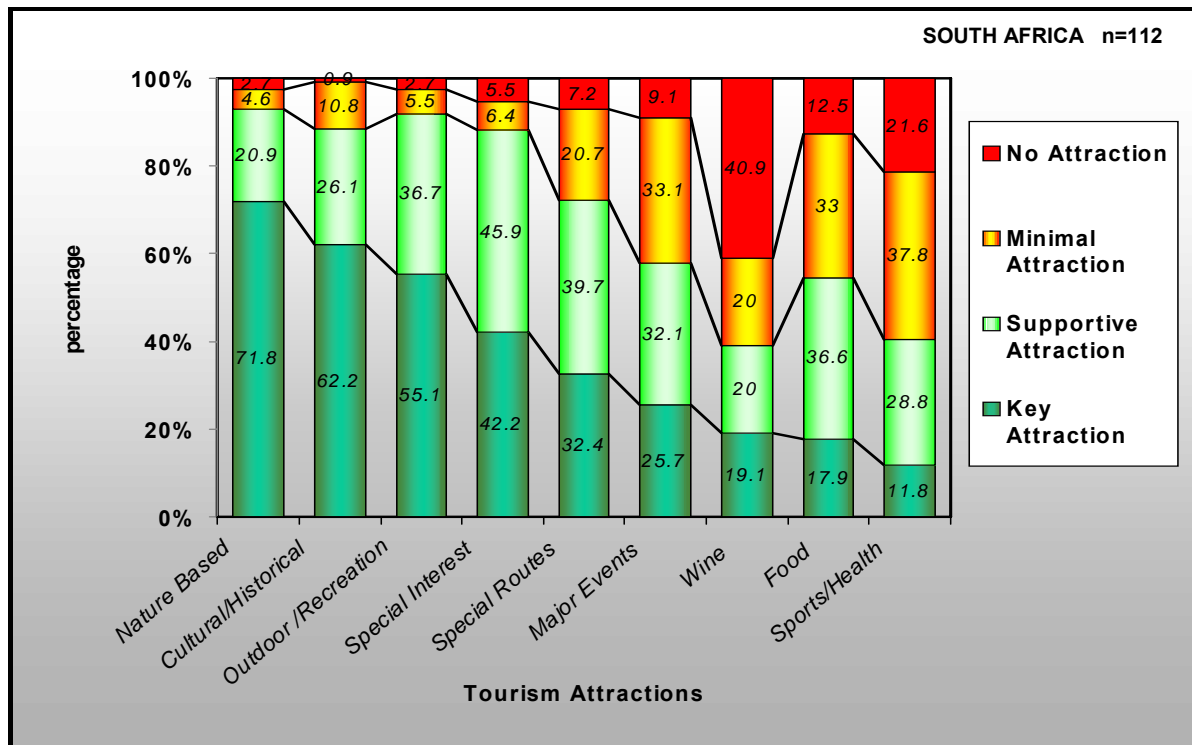


Figure 6.4: The relative position of food as an attraction in South Africa

Wine, although also an attraction in its own right, is often marketed together with food. It fares slightly better than food as a key attraction (19.1%), but is not as strong a supportive attraction as food (20%). The reason for this is that wine tourism is still very much localised in South Africa and only in recent times becoming more of a destination experience, where wine is not produced (Bruwer, 2003; Demhardt, 2003; Tassiopoulos, Nuntzy & Haydem, 2004). Wine has the highest score for the no attraction category (40.9%), the reason being that wine is mainly produced in the Western Cape where it scored the highest (46.3%) as a key attraction in comparison with the provinces.

The spatial representation of food and wine as key, supportive and minimal attractions respectively is portrayed in Figure 6.6. It is clear that food is a much stronger supportive attraction at a national level than wine, but both food and wine are key attractions locally and in some provinces. An interesting observation is that in certain areas of Gauteng they are, although this region does not produce many of the products utilised in the offering of food and wine tourism.

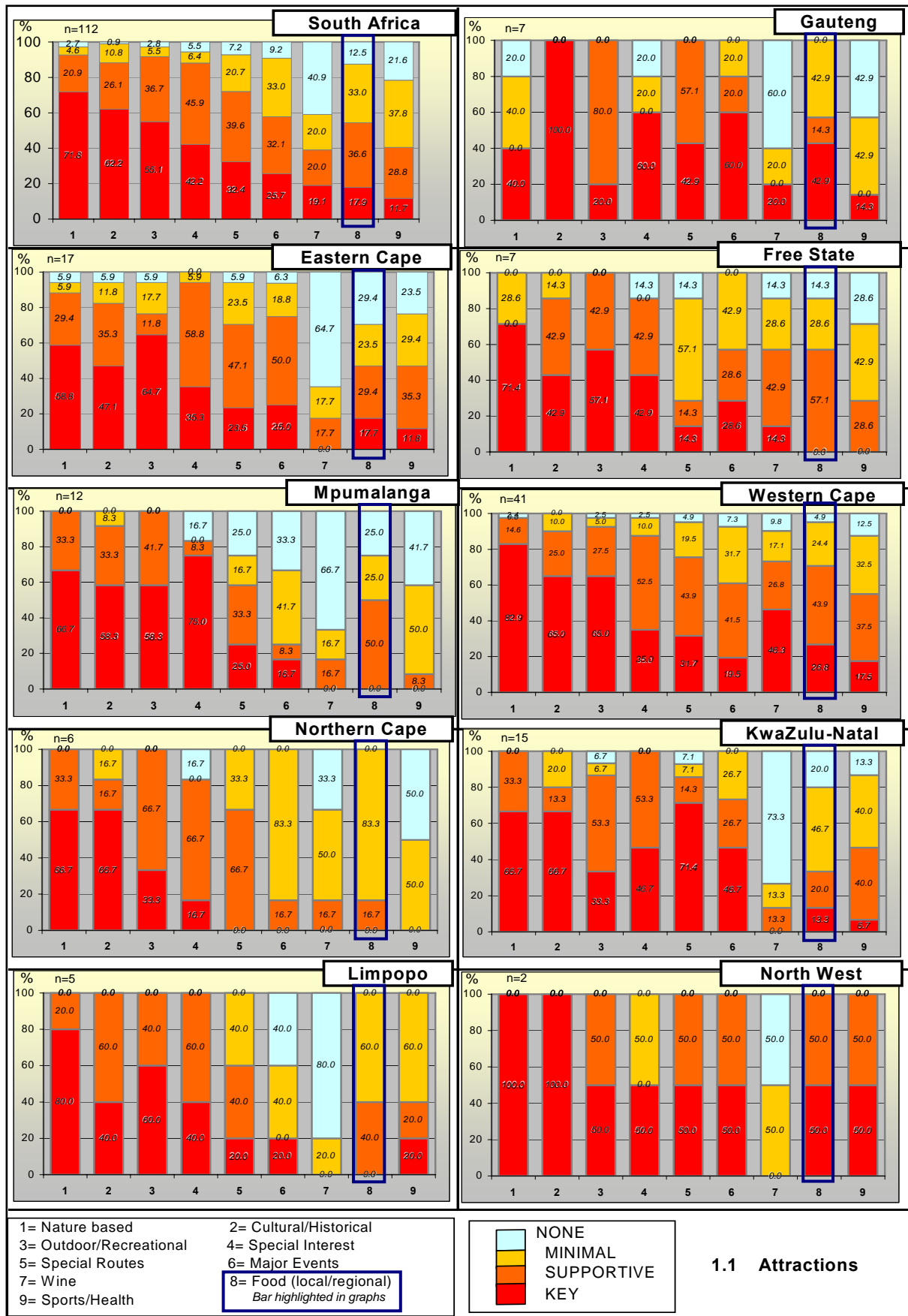


Figure 6.5: The relative position of tourism attractions in all provinces and South Africa

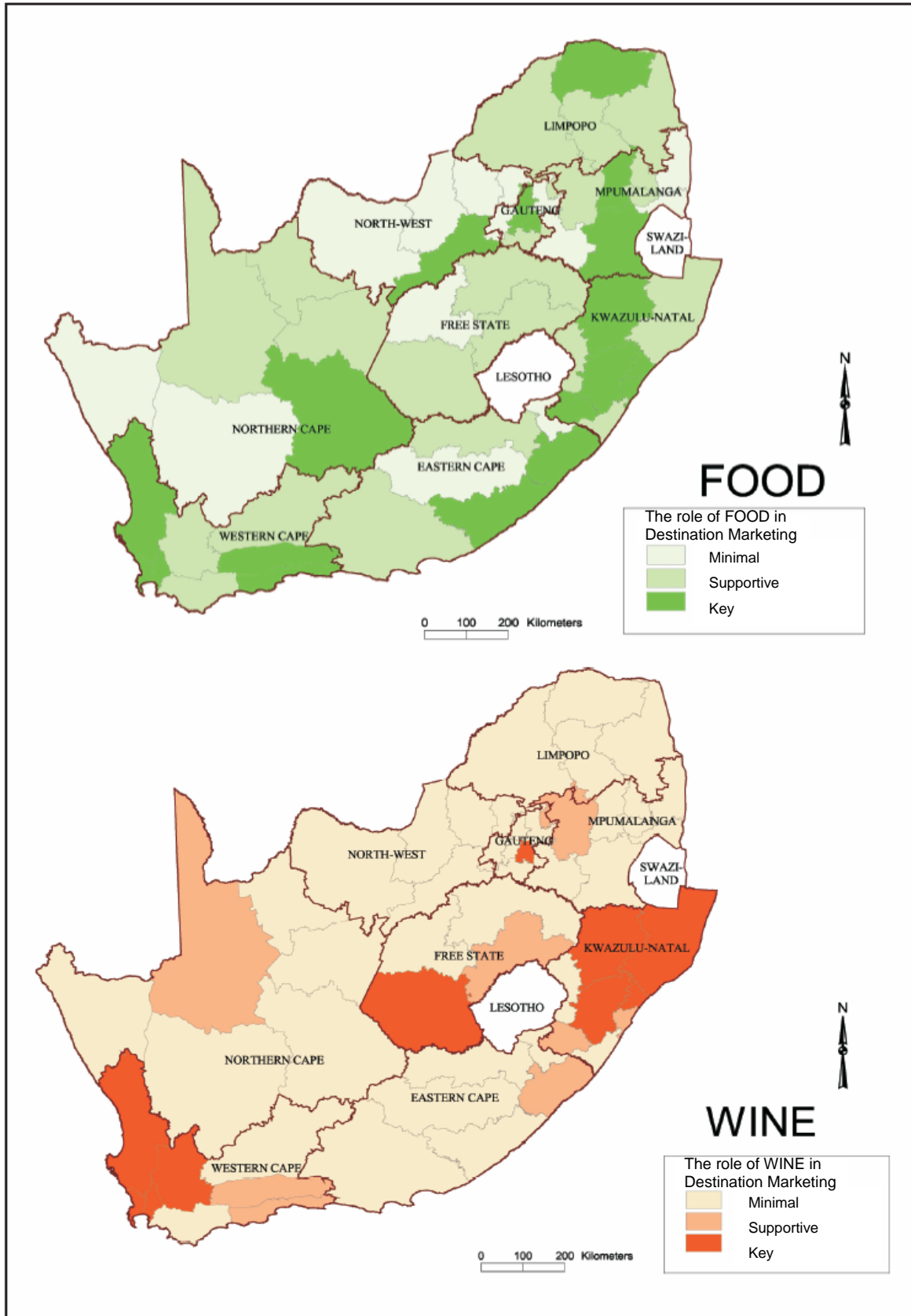


Figure 6.6: The spatial representation of food and wine as key, supportive and minimal including no response attractions

The fact that food did not feature amongst the top attractions nationally (Figure 6.7) is because stakeholders were unaware of the tourism potential (37.5%); had insufficient knowledge regarding the promotion of food (28.6%); and/or where there was a lack of marketing efforts (27.7%). The low score for insufficient funds (13.4%) is noteworthy. This could be the reason for lack of recognition of food tourism as a key attraction.

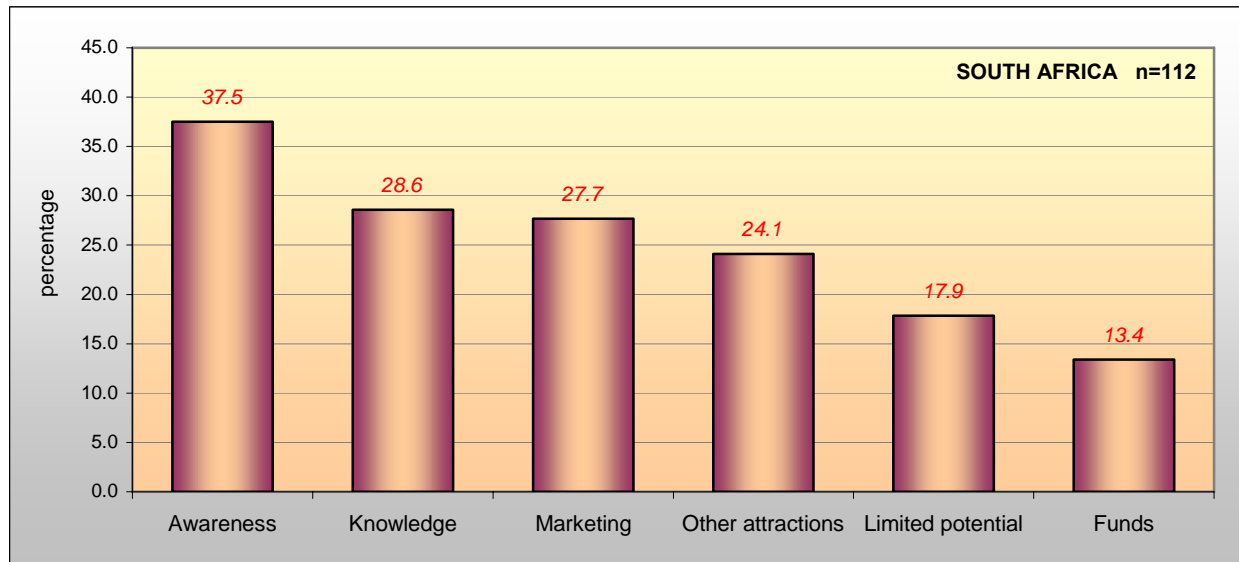


Figure 6.7: Key reasons for food not being regarded as an attraction

These findings indicate how essential a strategic approach to food tourism as an attraction in destination marketing is as has been the case in several countries such as Canada, Australia, Britain and the USA (British Tourist Authority, 2003; Canadian Tourism Commission, 2002; Colac Otway Shire & Colac Otway tourism, 2001; Hall, *et al.*, 2003; The Economic Planning Group of Canada, 2002; Tourism Tasmania Core Strategy Development Unit, 2002; Wolf, 2002b).

Compared to the average score (17.9%) recorded for South Africa regarding food as a key attraction (Figure 6.8), only Gauteng (42.9%) and the Western Province (26.8%) had higher scores. Food attractions in the provinces were categorised as key, supportive, minimal and none and plotted against the mean scores for the country as a whole. The high key attraction score that Gauteng received could be justified as Gauteng, which includes Soweto and various cultural villages, has promoted the culinary heritage of the African culture as an authentic tourist experience (Du Rand *et al.*, 2003; Kleynhans, 2003; Ramchander, 2004).

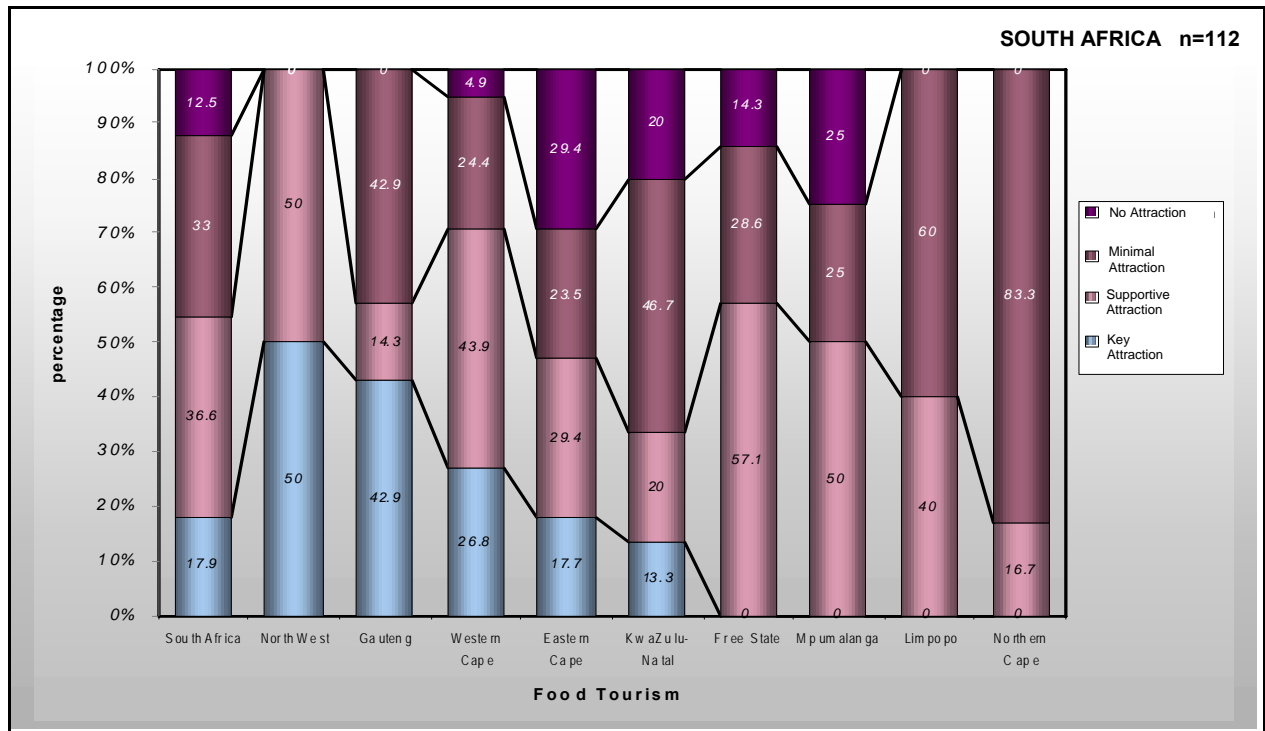


Figure 6.8: Relative position of food tourism as an attraction in the provinces and South Africa

Furthermore, Gauteng receives the highest number of tourists annually in South Africa (50.7%), which provides the opportunity for the province to meet the demand of visitors by providing food and beverages (South African Tourism, 2003). The Western Province however, had the highest score for food as a secondary attraction (43.9%), which is justified when considering the fact that wine is an important key attraction of the province (46.3%). Food, as a secondary attraction is important in the Free State (57.1%), Mpumalanga (50%), and the Western Cape (43.9%), where these provinces all scored higher than the average for South Africa as a whole. The scores received for food being considered as no attraction ranged from 0% to 29.4% and for minimal attraction between 23.5% and 83.3%. The Western Cape is the only region where the computed value of food as a key and supportive attraction is above 70%. The other regions fall in the 50% range and below.

That food as a key and/or supportive attraction features in all the provinces is evidence for support of the general view in the literature that food as a tourism attraction needs to be taken more seriously in marketing strategies (Boniface, 2003; Canadian Tourism Commission, 2002; Cohen & Avieli, 2004; Elmont, 1995; Hall *et al.*, 2003; Handszuh, 2000; Hjalager & Richards, 2002; Richards, 2002; World Tourism Organization, 2000).

6.3.2 Key Components of Food Tourism

The key components of food tourism (Figure 6.9) are used to promote the use of local and regional food as a tourism attraction by means of the various products, facilities, activities, infrastructure, events and attractions in a destination. Two important findings stand out. First, the availability of local and/or regionally produced food products and the presence of speciality restaurants of the area, were decidedly dominant criteria. Second, also emerging as significant is the role played by routes, festivals and events.

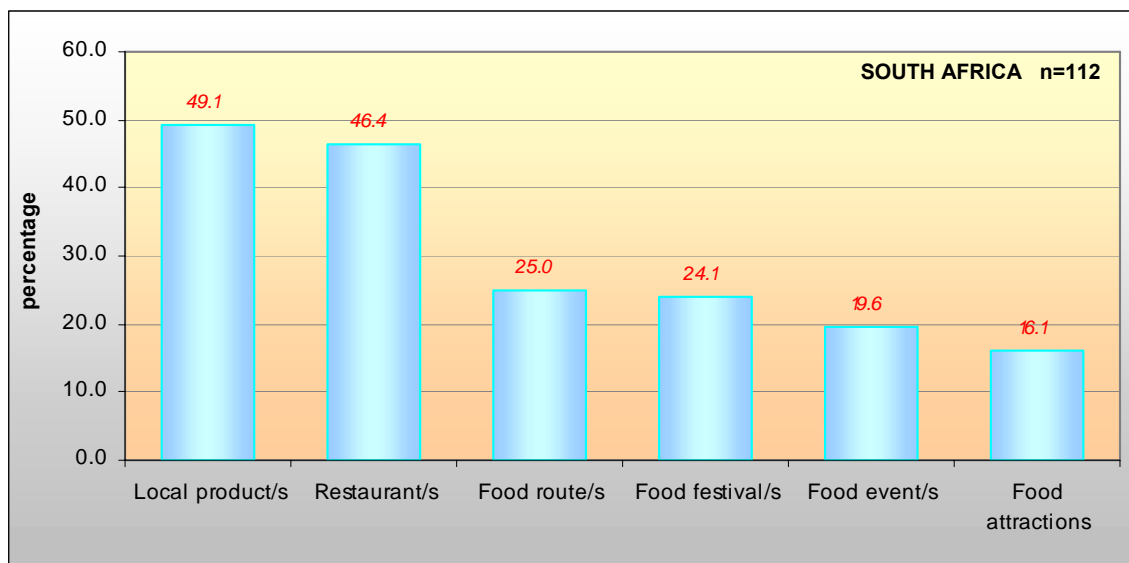


Figure 6.9: Key components of food tourism in South Africa

The presence of local and regionally produced products (Figure 6.10) scored the highest in the Western Cape (68.3%), Eastern Cape (47.1%), Mpumulanga (41.7%) and KwaZulu Natal (40%), whilst speciality restaurants scored high in the Western Cape (68.3%), Eastern Cape (58.8%), Gauteng (57.1%) and Mpumulanga (41.7%). Speciality restaurants in the Northern Cape had the highest score for all key components of food tourism in that region (33.3%). Food events and food attractions scored the highest in the Free State, (42.9%) for both components; the reason for this could be the well-established cherry festival in this province. Food routes and food festivals achieved the highest scores in the Western Cape, with 36.6% and 34.1% respectively. A possible reason for these scores could be the existing wine routes and food festivals such as the annual oyster, cheese, olive and other local product festivals in the Western Cape, which have fostered the development of food tourism in that province.

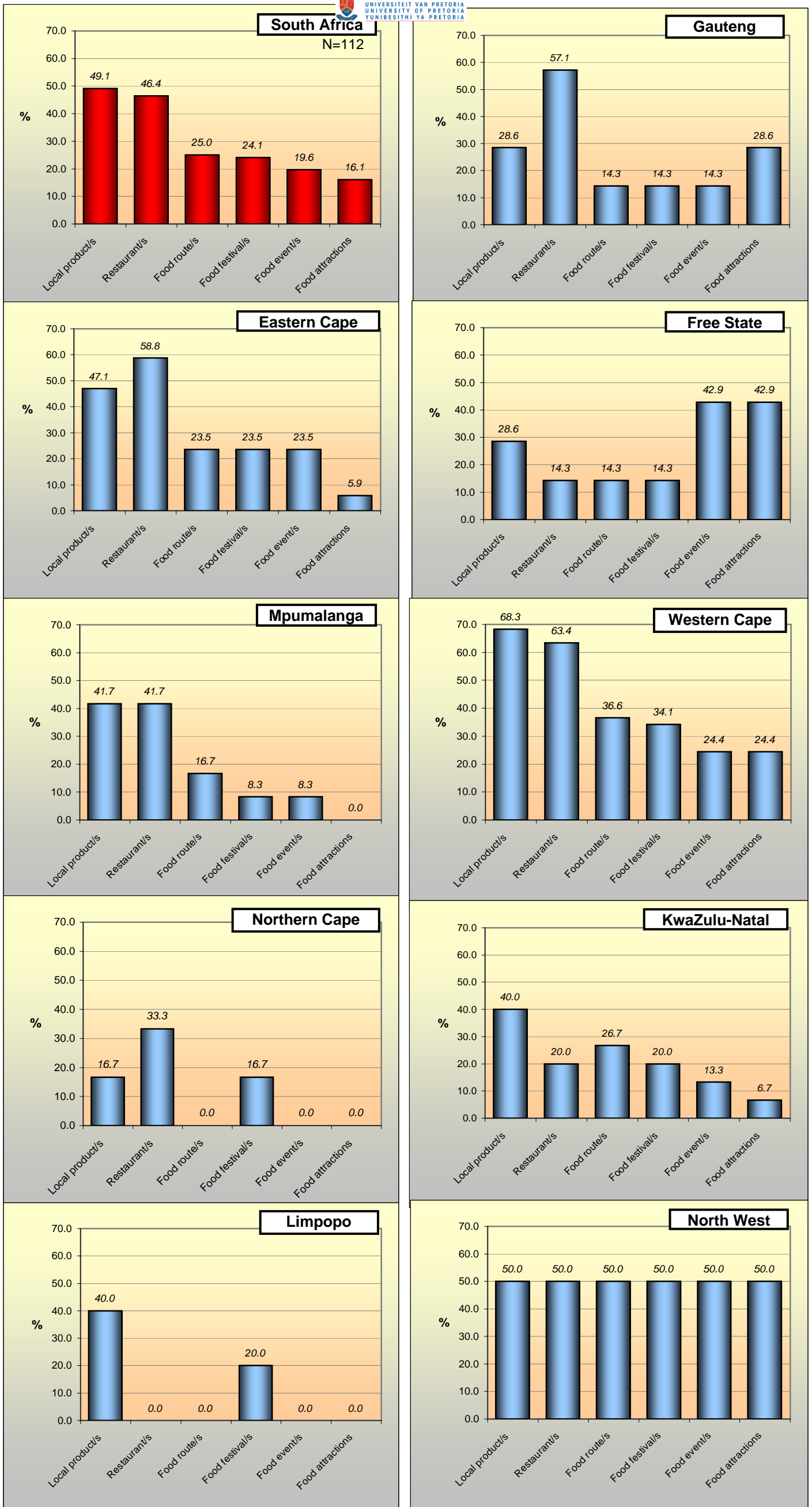


Figure 6.10: Key components of food tourism in the provinces and South Africa

As to be expected, the components of food tourism are quite well established in the speciality restaurant industry and in places where local products are unique and available. This finding is in accordance with expectations, as it is the traditional way of showcasing the food of a region and offering a tourist a cultural experience (Bessiere, 1998; Boniface, 2003; British Tourist Authority, 2003; Burnett, 2000; Cohen & Avieli, 2004; Deneault, 2002; Elmont, 1995; Gallagher, 2001; Hall, 2003; Hall *et al.*, 2003; Handszuh, 2000; Hjalager, 2002; Hjalager & Corigliano, 2000; Kaspar, 1986; Long, 2003; Santich, 1999; Smith & Hall, 2003; Wolf, 2002a).

Put another way, the traditional way that food experiences are offered at a destination is reflected by the presence of restaurants (Smith & Hall, 2003; Sparks, Bowen & Klag, 2003; Sparks, Wildman & Bowen, 2001). This is a simpler way of providing food for tourists, as it does not involve additional effort, organisation and promotional activities as, for example, a food festival would require. Therefore the other components, which do not feature that strongly, could possibly be improved with a more focused strategic approach to the development and implementation of food tourism, especially in the light of capitalising of existing resources, such as local foods products and restaurants. The tourism industry has identified South African cuisine as a product that needs to be developed as reported in the 2004 Global Competitiveness project (South African Tourism, 2004). The findings of this study support this claim.

6.4 SITUATIONAL ANALYSIS OF FOOD TOURISM IN DESTINATION MARKETING

In the preceding section the relative position of food tourism and the key components thereof were established on a national and regional level. The execution of a situation analysis of South Africa's current usage of food as destination attraction/experience and marketing tool presented the following results and findings: identification of the marketing strategies and tools used in the promotion of food (Section 6.4.1); promotional gaps and constraints and the actions required to address them (Section 6.4.2 and 6.4.3); and finally the presentation of proposed strategies and their importance regarding the optimisation of food tourism (Section 6.4.4).

6.4.1 The Current Role of Food In Destination Marketing Strategies

It can be assumed that the stakeholders in a tourism region are not unaware of the importance of food in marketing a destination as 56% of the respondents nationally (Figure 6.11) reported that food is used as a marketing activity or tool in promoting their region.

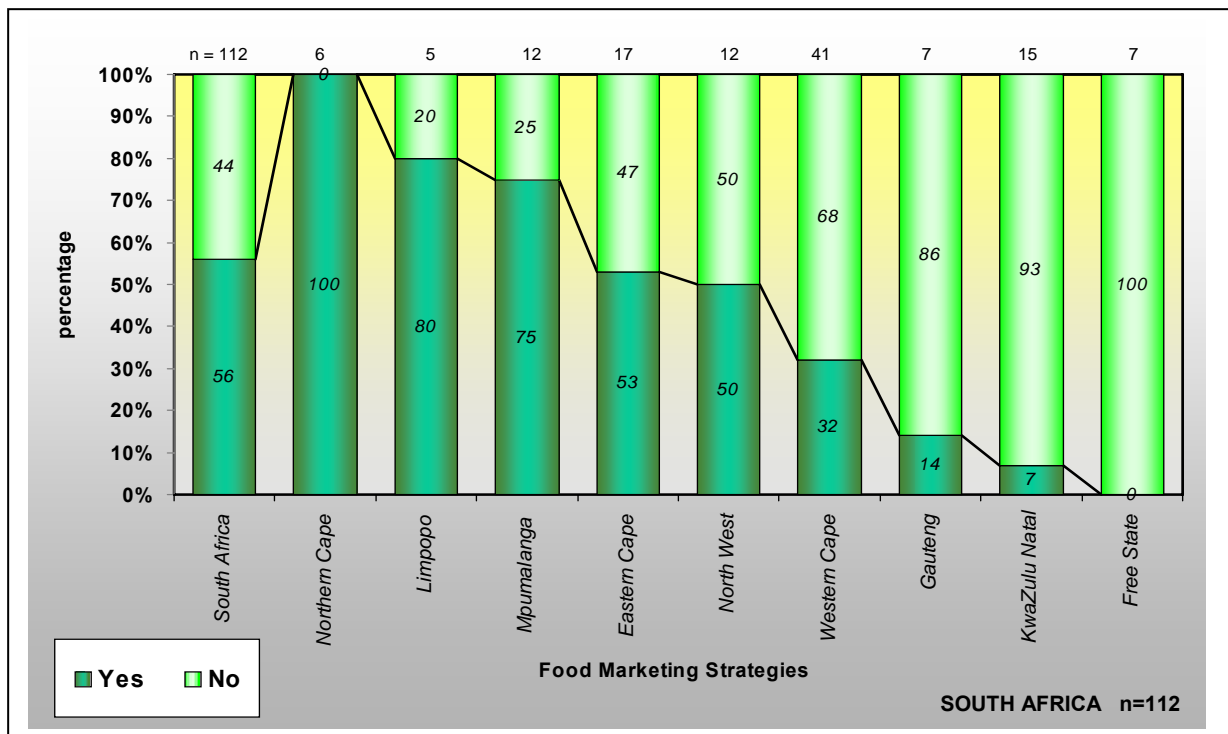


Figure 6.11: The use of food marketing strategies on a national and provincial level

Of particular significance is the finding that Gauteng and the Western Cape, where food tourism had a high rating as a key and/or supportive attraction, their marketing activities and strategies did not fare that well. A possible explanation for this could be the fact that food is often advertised commercially and not specifically as a tourism experience (Du Rand *et al.*, 2003) especially in Gauteng, whilst in the Western Cape the well established wine tourism is the key attraction and food is often the 'add-on' attraction (Bruwer, 2003; Demhardt, 2003).

The extent to which respondents used various methods of marketing in food tourism promotion is illustrated in Figure 6.12. The most traditional way is the preparation of brochures. Even though these were used to a limited extent, in fact only by about a third (35.7%) of the respondents, information regarding food and dining experiences was often inadequate, scant and mediocre. The use of the website as a marketing method scored the third highest (29.5%), which is in accordance with present trends where e-marketing is becoming more popular and effective in the tourism industry (Baourakis, Kourgiantakis & Migdalas, 2002; Benckendorf & Black, 2000; Berton, Pitt & Watson, 1996; Buhalis, Hampton & Butler, 2001; ETC, 2002; Freeman, 2002; Jackson & Cloete, 2000; Liu, 2000; World Tourism Organisation, 2001). Very few tour operators (13.4%) promote food tourism, which further verifies the fact that food tourism is not a priority in the industry and that a focused marketing strategy is nonexistent. Therefore a framework and procedure to assist DMOs in marketing and implementing food tourism in a region would be beneficial.

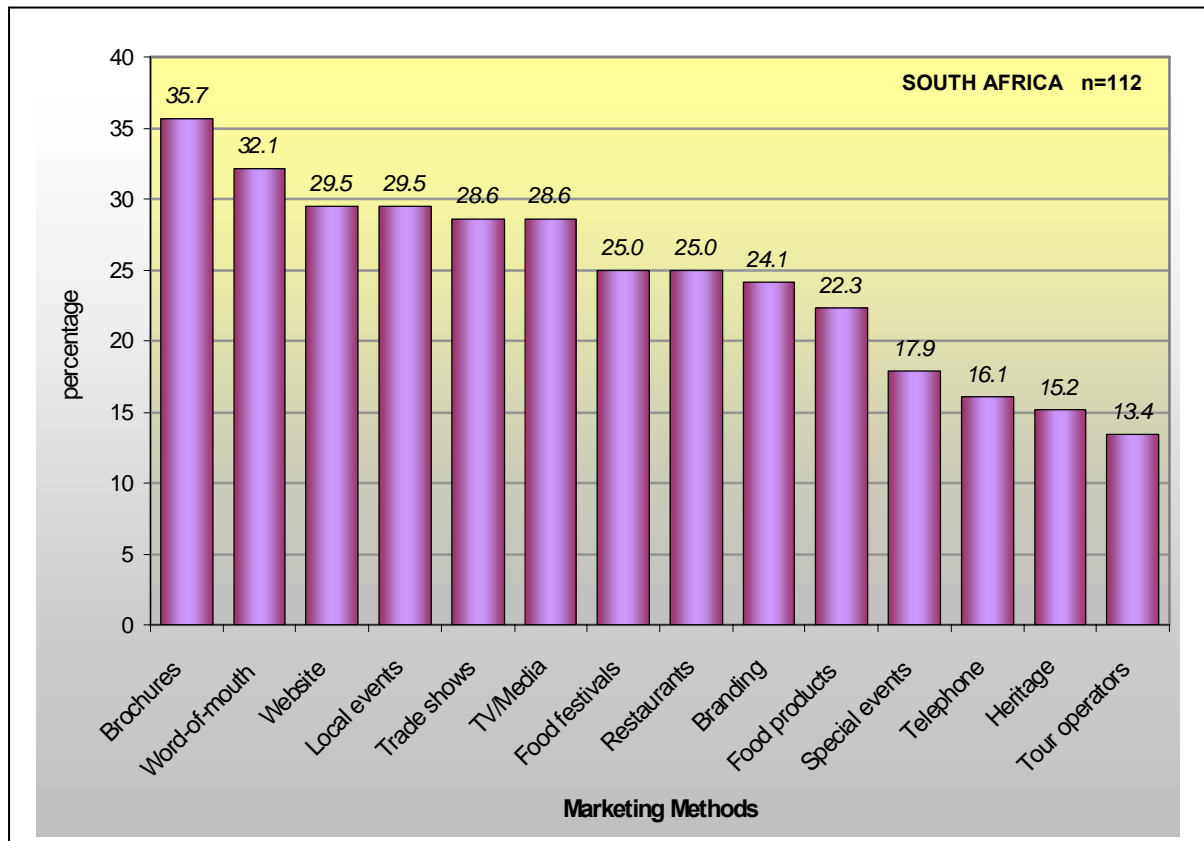


Figure 6.12: The use of marketing methods regarding food tourism

The Western Cape scored (Figure 6.13) the highest across the board for all the marketing methods utilised at a destination. Again this could be attributed to the presence of the well-established wine tourism industry in the province. What is of major concern is the fact that there is a general low level of utilising food as a marketing activity or tool to promote a destination in the provinces, the Western Cape being a marked exception. The majority of scores achieved for the use of the various strategies and tools ranged between 0% and 30%. This gap in the product marketing was also noted by the Global Competitiveness project report (South African Tourism, 2004). Four of the provinces, namely the Western Cape, Eastern Cape, Gauteng and KwaZulu-Natal used all of the 14 different marketing strategies and tools generally applied in food tourism marketing initiatives. Noteworthy is that these are also the four provinces with highest computed values for food tourism as a key and supportive attraction. Of significant importance is the fact that the use of culinary heritage as a marketing strategy and tool received low scores in all the provinces. This could be explained by the lack of knowledge regarding culinary heritage and local and regional foods. This was also the second most important reason why food is not always regarded as a key or supportive attraction in a region.

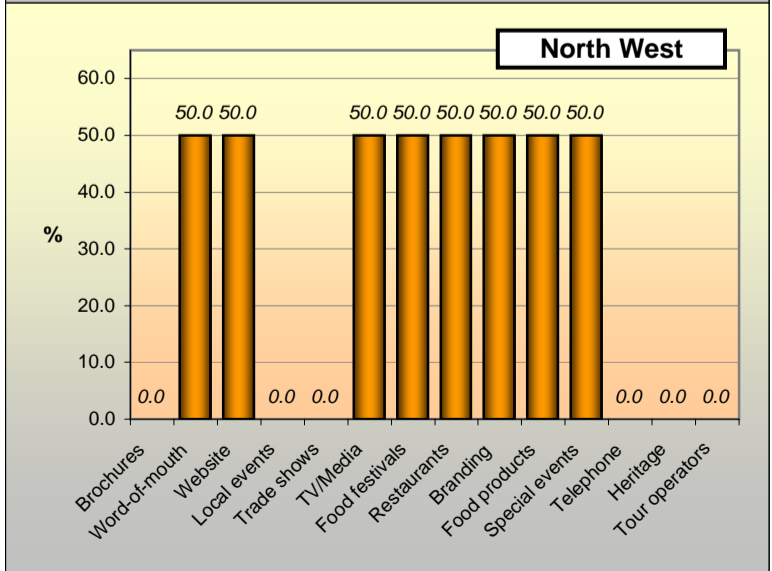
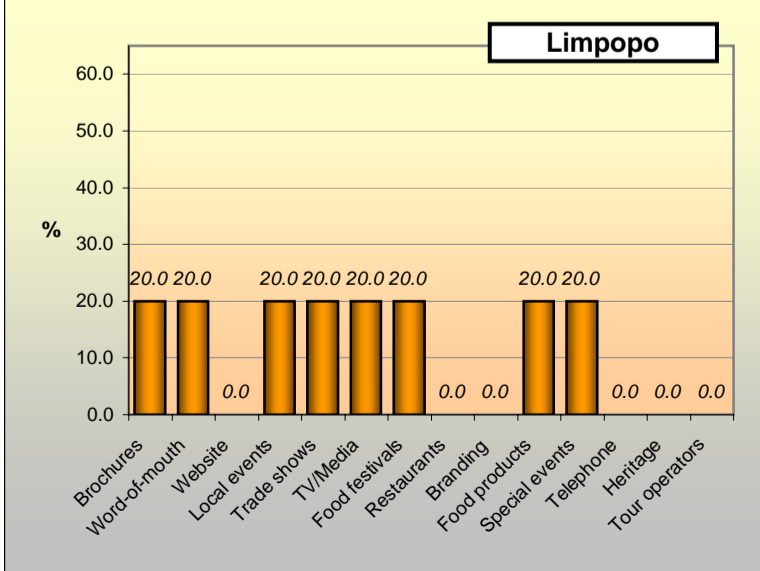
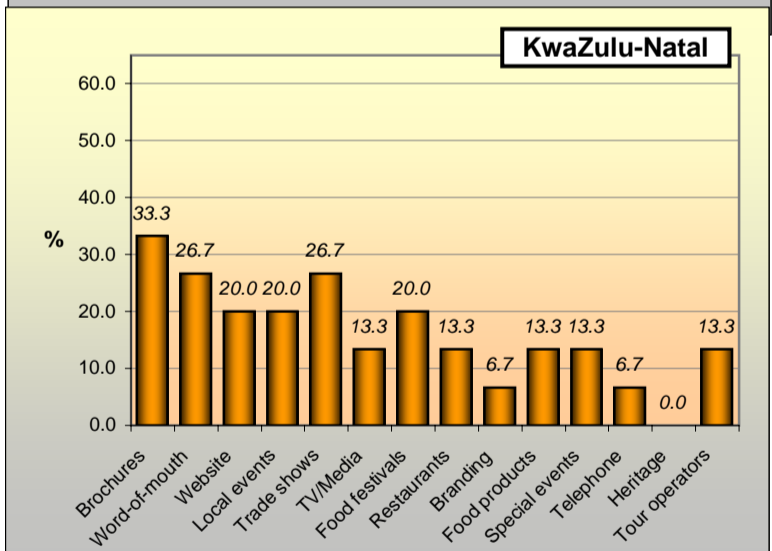
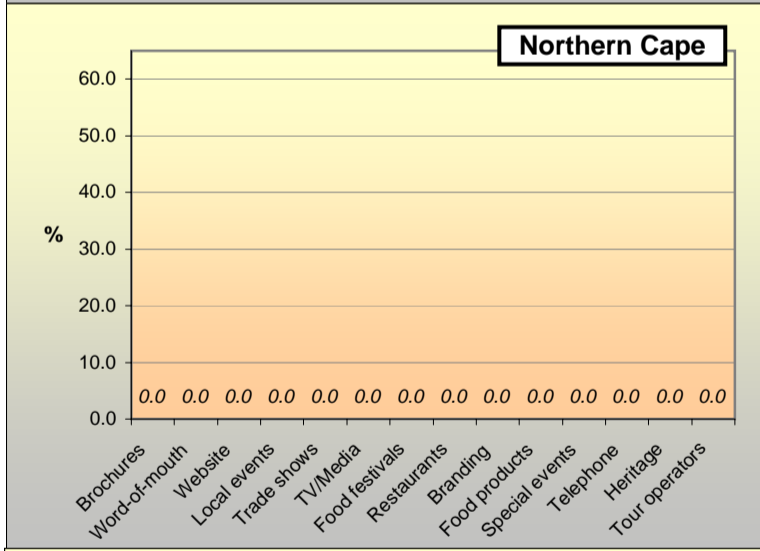
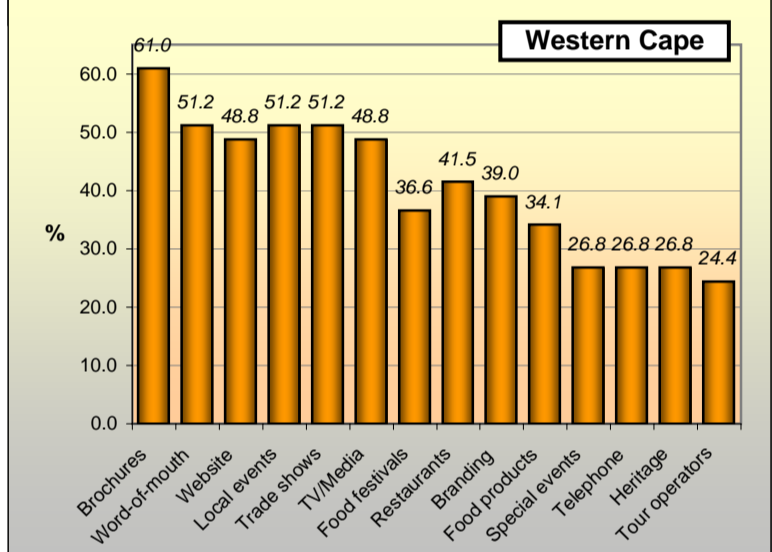
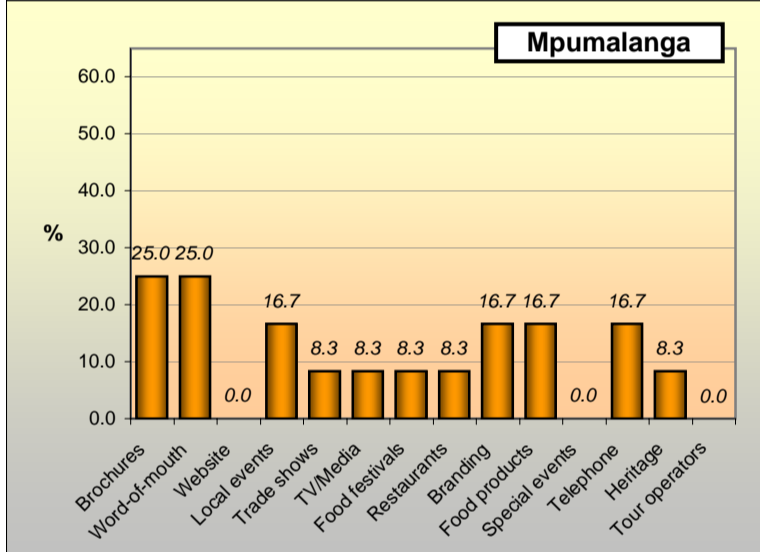
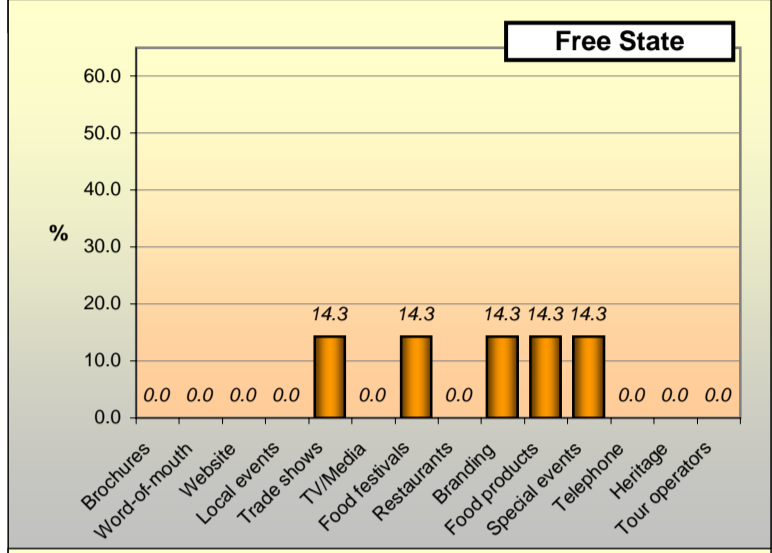
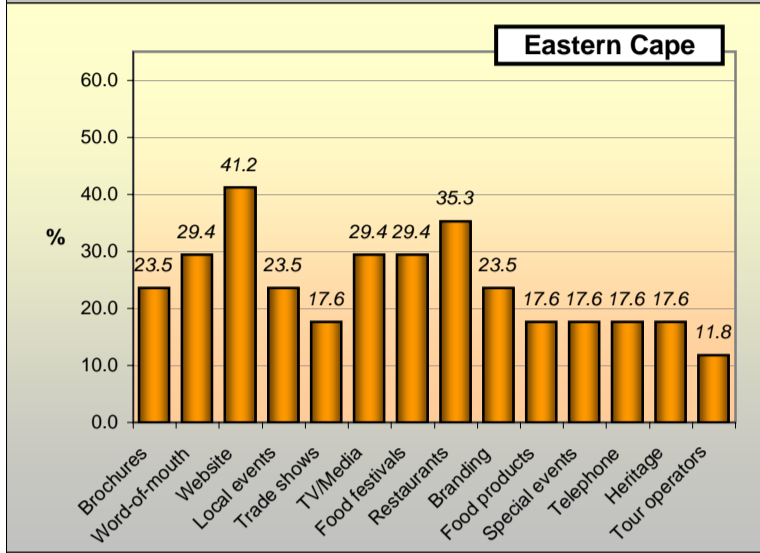
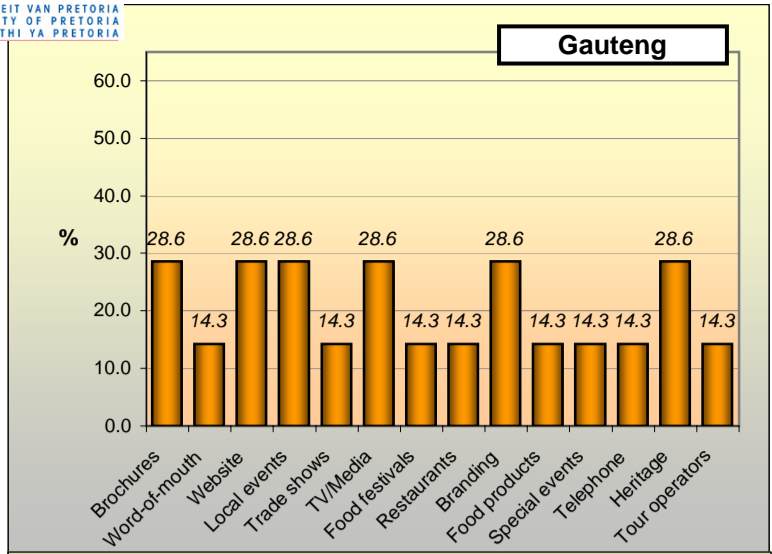
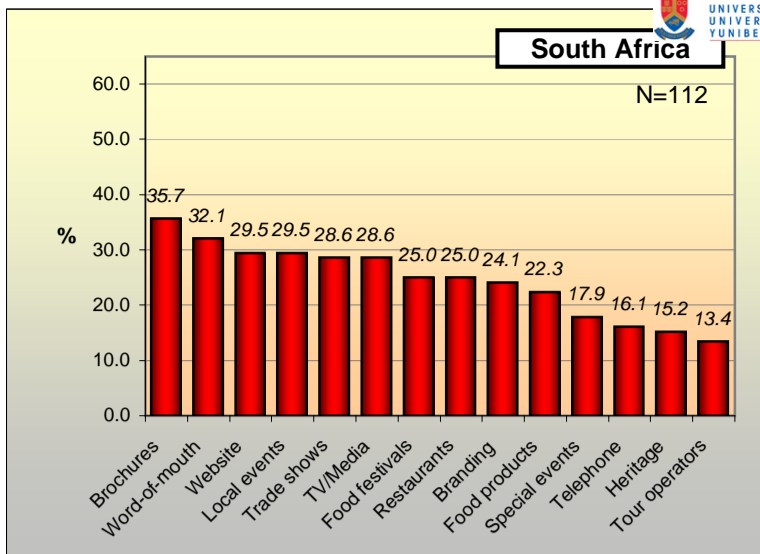


Figure 6.13: The use of marketing methods regarding food tourism on a provincial level

6.4.2 The Perceived Constraints and Gaps Regarding Food Tourism

Respondents were required to indicate whether there were gaps (what is missing/lacking), and constraints (what prevents the deficiency from being corrected) regarding the promotion of food as a tourism attraction in their destinations and furthermore to identify the types of promotional gaps and constraints that existed. The indication of the gaps and constraints was to determine the strengths and weaknesses concerning the internal resource analysis as part of the situational analysis. Figure 6.14 presents the breakdown on a national and provincial level regarding the existence of gaps and constraints concerning the promotion of food tourism in their regions. On a national level only 13% of the respondents indicated that gaps and constraints regarding the promotion of food tourism existed.

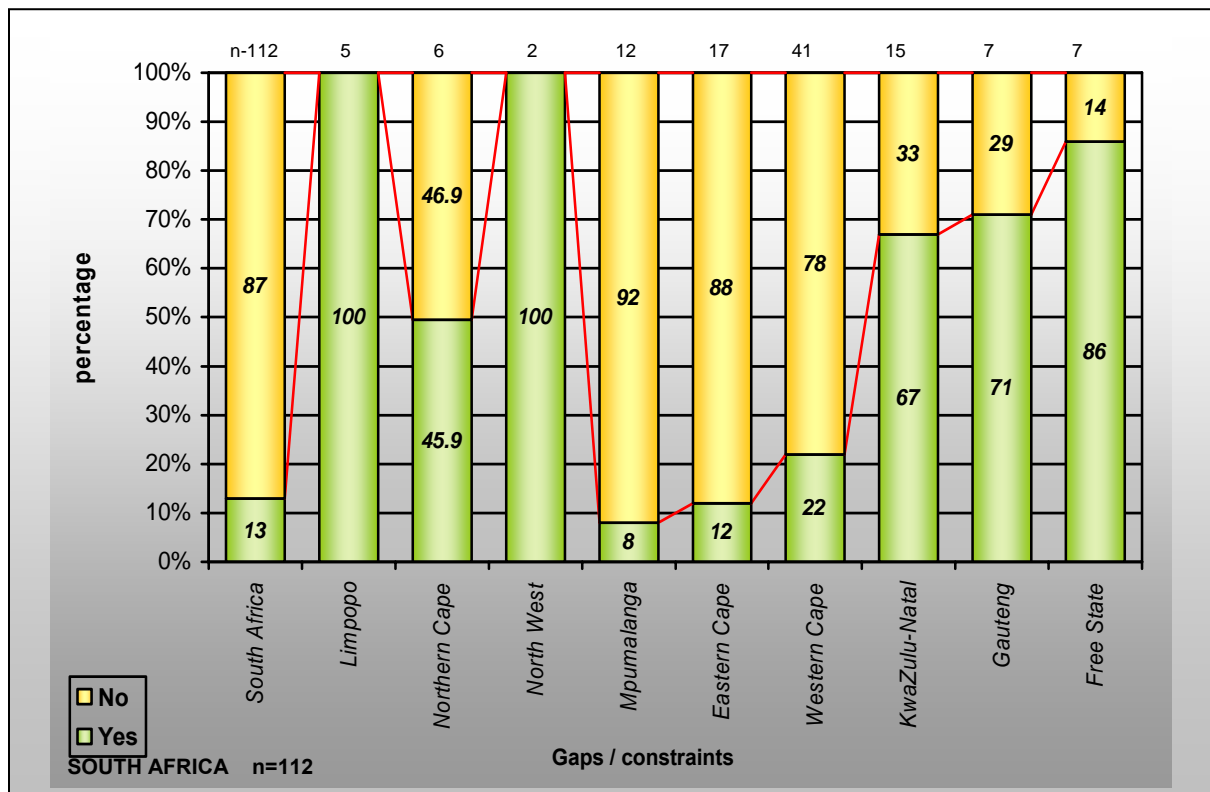


Figure 6.14: Promotional gaps and constraints on a national and provincial level

A possible explanation for this could be the low level of importance that food tourism has received as a key tourism attraction (17.9%) and the lack of awareness of the potential of food tourism as a tourism attraction (37.5%). Important to note is the fact that the results indicate a similarity between the use of food marketing strategies and the existence of promotional gaps and constraints for the majority of provinces. So for example, Mpumalanga (75% vs 8%) and the Eastern Cape (53% vs 12%) both had high scores for

utilising food marketing strategies and low scores for promotional gaps and constraints. Likewise Gauteng (14% vs 71%), KwaZulu-Natal (7% vs 67%) and the Free State (0% vs 86%) all scored low regarding the use of food marketing strategies and high regarding the existence of promotional gaps and constraints.

The Western Cape, however, scored low for utilising food marketing strategies (32%) at the same time scoring low-down on the list regarding the existence of promotional gaps and constraints (22%). A possible explanation could be the wine tourism focus and the ease of utilising the existing infrastructure to support food tourism as an ‘add-on’ in promotional activities.

Figure 6.15 provides a breakdown of the perceived promotional gaps and constraints regarding food tourism in South Africa. In the different regions the major gaps and constraints related to the promotion of local and regional foods as a tourism attraction in a region, concerned promotional and marketing strategies, export initiatives, financial issues and policy aspects. These impede the region of optimising its food tourism potential.

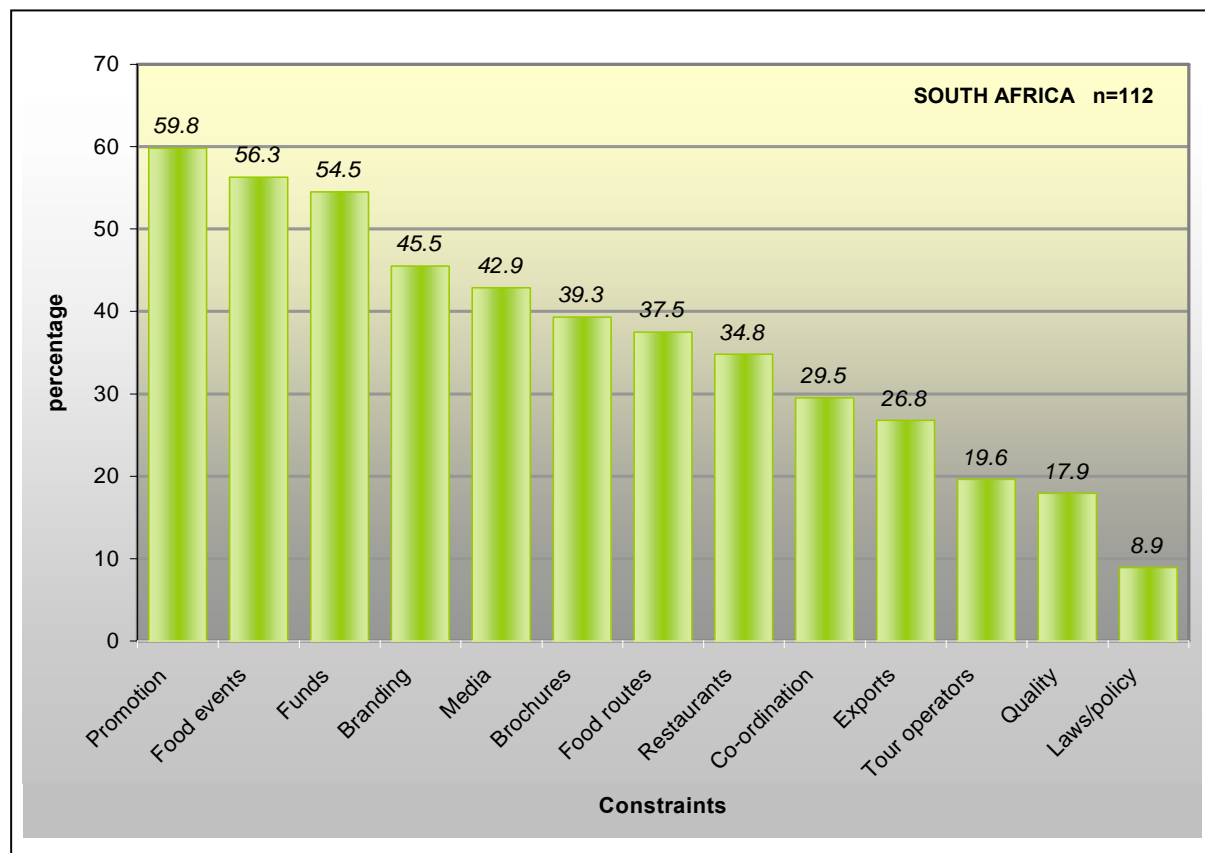


Figure 6.15: The perceived constraints and gaps regarding food tourism

Nearly 60% of the respondents regarded the general lack of food promotion as the key constraint or gap. The fact that there are no special food events organised in a region (56.3%) and that funds are a constricting factor (54.5%), compounds the situation of food not being promoted as a special or niche tourism attraction. Of particular significance are the constraints regarding marketing (special food events; branding; media coverage; brochures) that are perceived to be more important than the constraints regarding the product (routes; speciality restaurants; quality of food service and products). The lack of funds (54.5%), and the fact that tourists, regardless of the marketing initiatives undertaken, will still consume food for basic need satisfaction, may be the underlying reason for this situation.

The entire range of promotional gaps and constraints are experienced in the majority of the provinces (Figure 6.16), although the degree of impact varies. For example, in the Eastern Cape the effect of local policy is markedly felt due to provincial laws (23.5%) that prohibit local restaurants from purchasing fish directly from local fisherman and reselling to their customers. Interesting to note is the high score that insufficient funds received as a promotional constraint in the Western Cape (56.1%), where insufficient funds (12.2%) was not regarded as the key reason for food not being regarded as a key or supportive attraction in that region. Once again the existence of the well-established wine tourism industry provides competition, but simultaneously opportunities for the development and implementation for food tourism in that region.

6.4.3 Proposed Initiatives to Address Perceived Gaps and Constraints

The initiatives and actions proposed by the respondents (Figure 6.17) focused on the areas of marketing, product development, funding and training. On a national level the respondents' views on initiatives required to address the perceived gaps and constraints regarding the promotion of food tourism in their regions, once again accentuated the fact that marketing (59.8%) required attention. Promoting the use of local food products (52.7%) and developing a marketing strategy incorporating food tourism (49.1%) were also highly rated solutions to support the proposed actions required. DMOs wanting to incorporate food tourism as one of their attractions will have to engage more actively in marketing related activities. The establishment of partnerships between stakeholders (48.2%) could strengthen the impact of an appropriate marketing strategy, which incorporates food tourism.

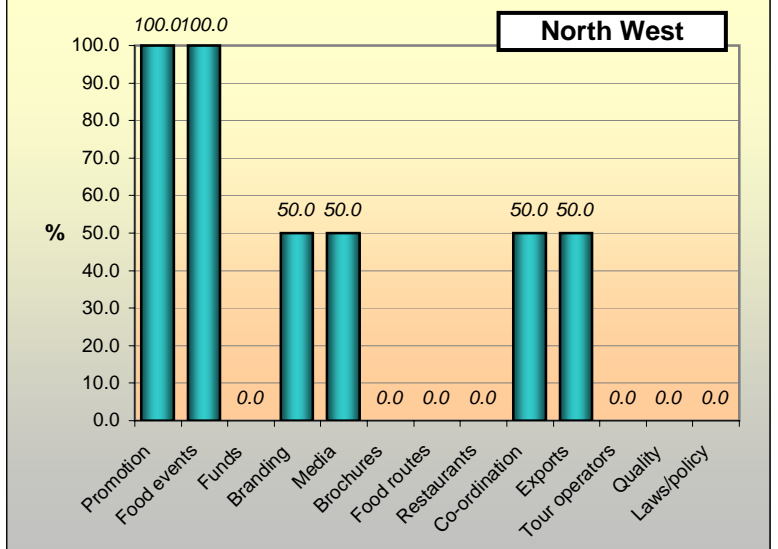
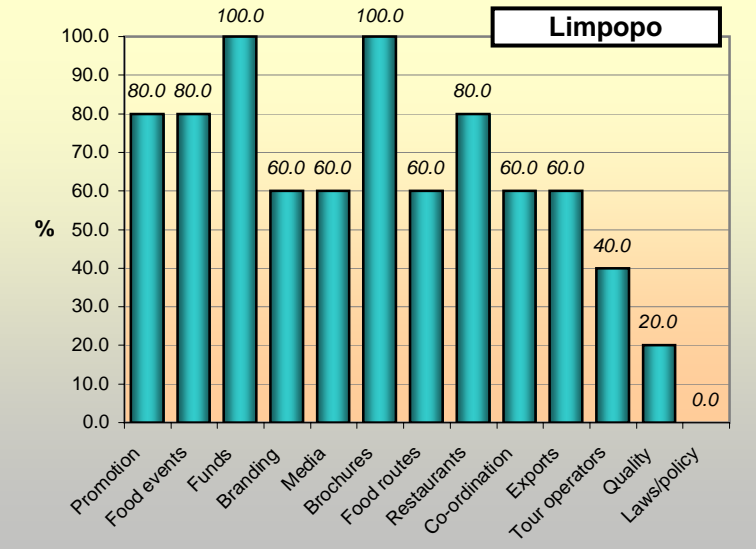
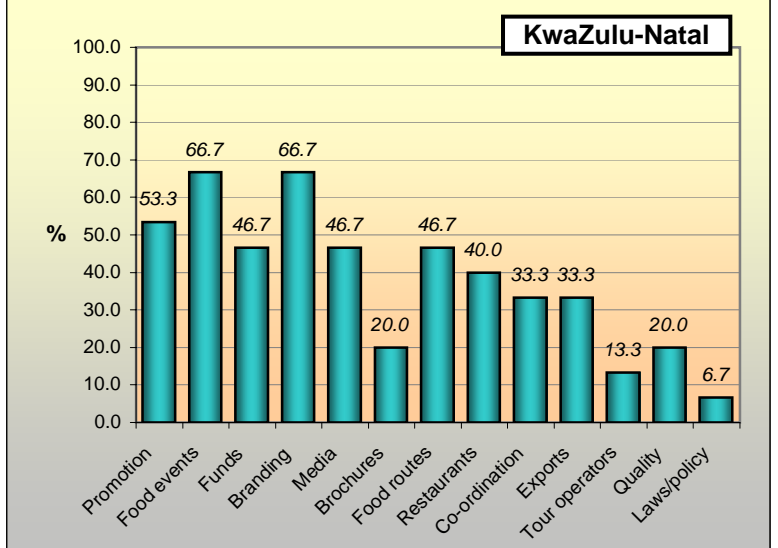
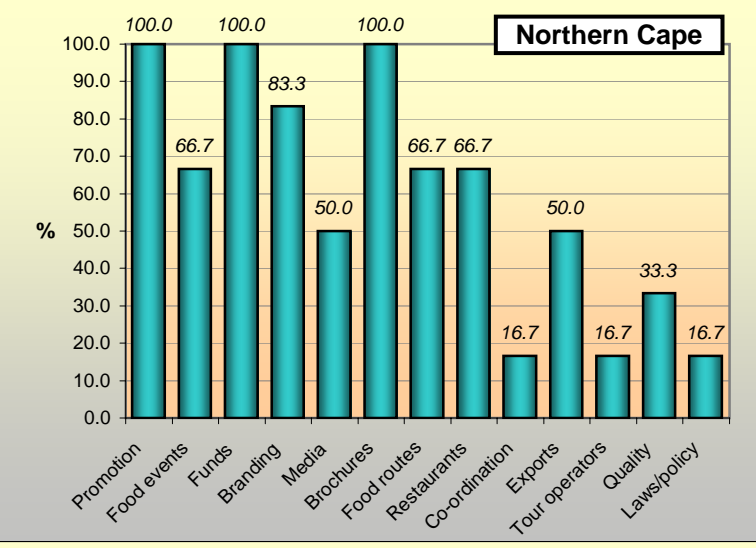
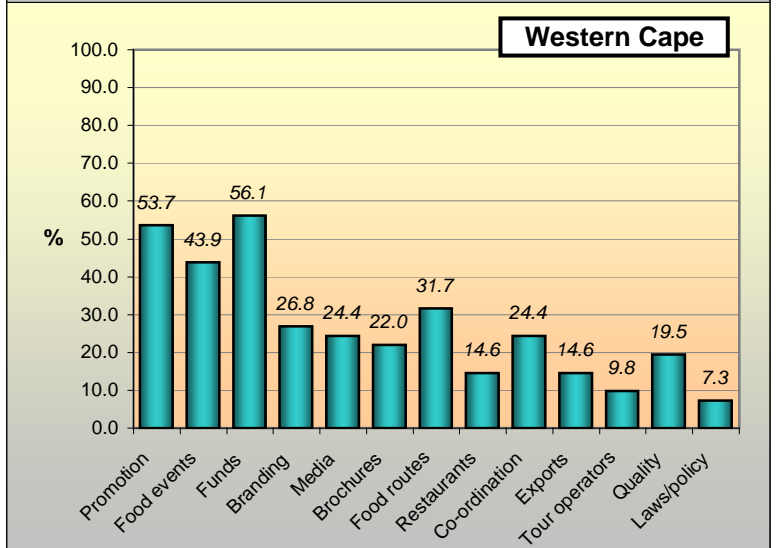
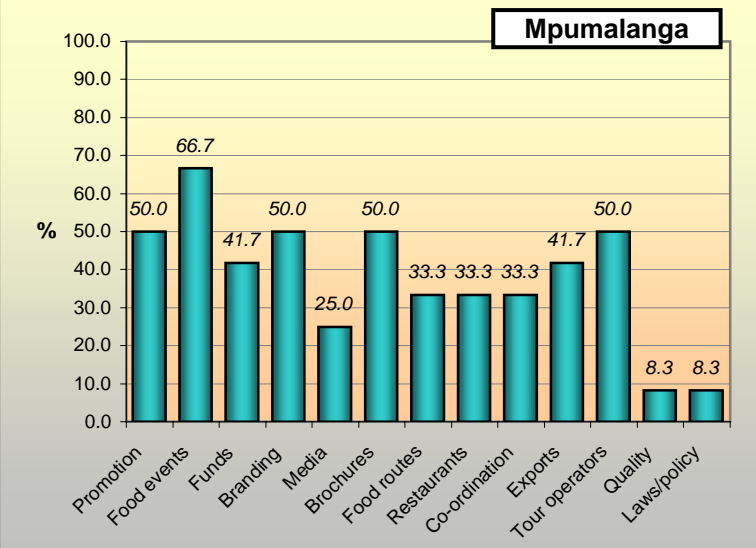
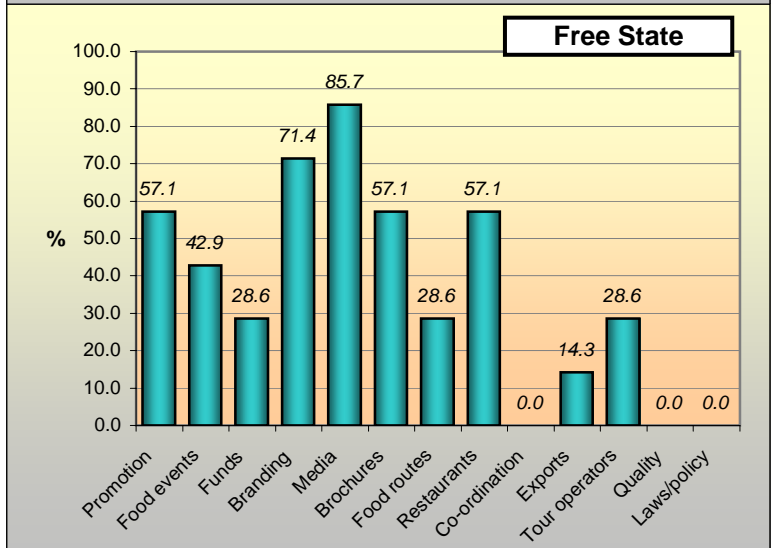
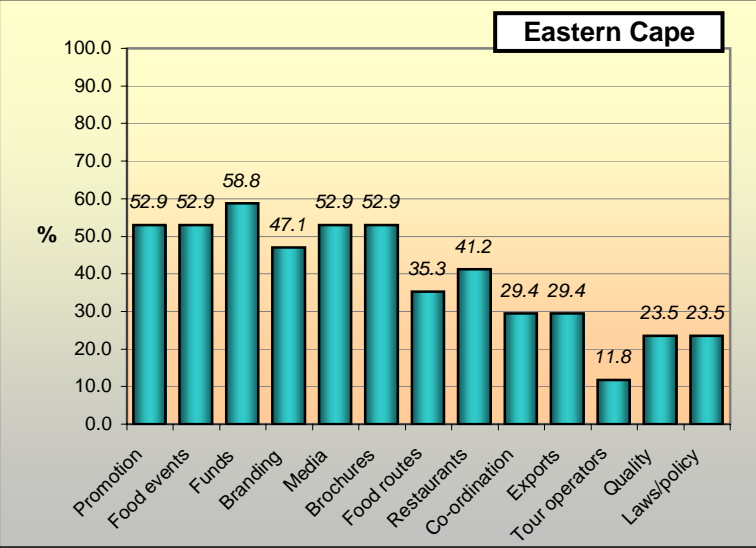
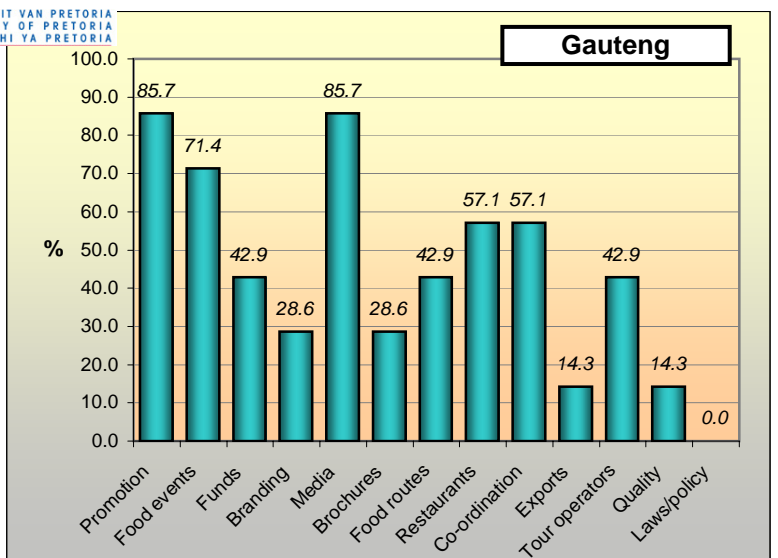
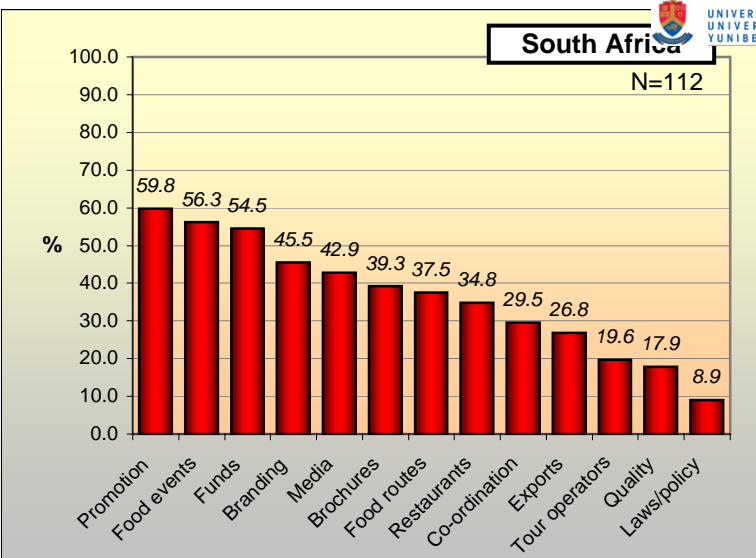


Figure 6.16: Promotional gaps and constraints on a national and provincial level

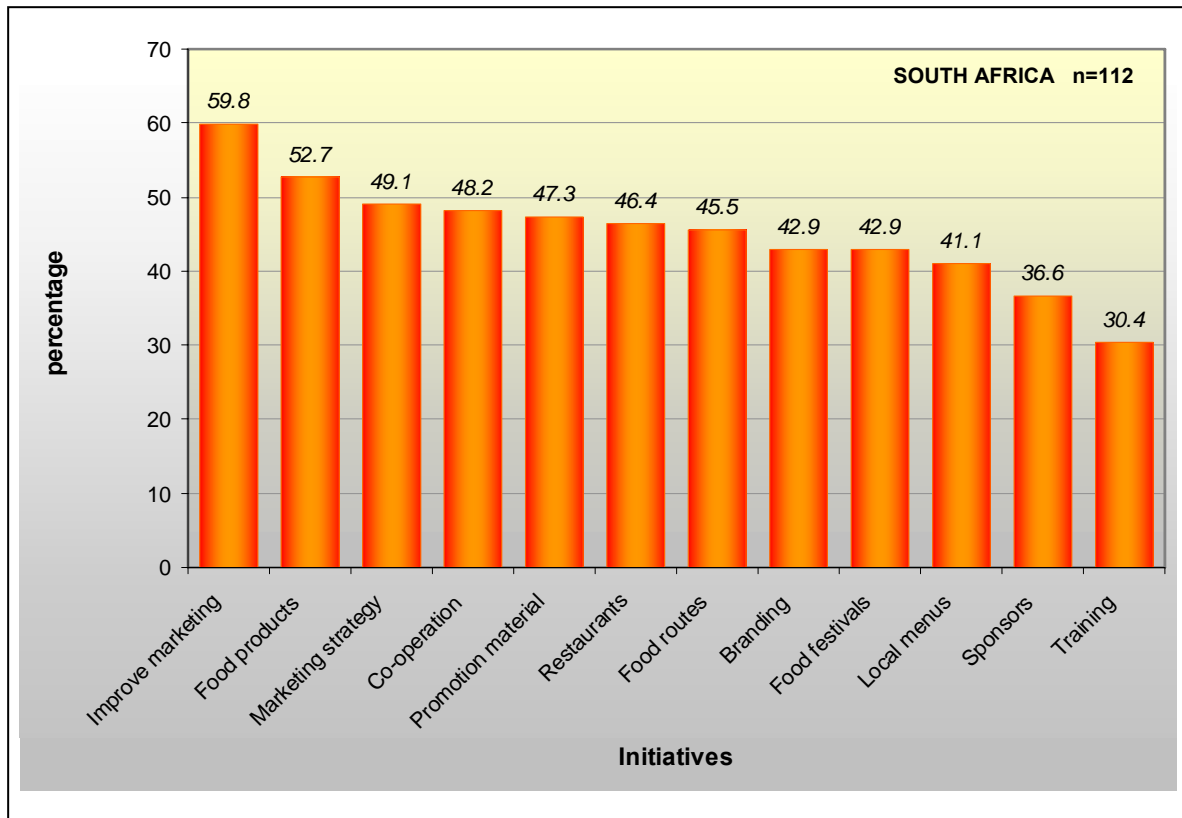


Figure 6.17: Proposed initiatives to address perceived gaps and constraints

At provincial level (Figure 6.18), initiatives to improve marketing activities received the highest scores of all proposed initiatives in the Eastern Cape (70.6%), Gauteng (57.1%) and the Western Cape (53.7%), whilst initiatives to develop products such as food routes in the Northern Cape (83.3%), Free State (57.1%), and Gauteng (57.1%) also received high scores. The scores for the Western Cape for the range of proposed initiatives to address the gaps and constraints fluctuated between 53.7% and 34.1%, which indicates a relatively even distribution regarding the importance of the proposed initiatives in that province. A possible explanation could be the already existing initiatives for the wine tourism industry that could be applied with ease in the food tourism industry. Training and the sourcing of funding/sponsorship received the lowest scores in the majority of the provinces. The fact that many employees are not properly trained in the food service industry in South Africa serves to substantiate this finding.

6.4.4 Stakeholder Recommendations for Future Strategy Development

The degree of importance of various possible strategies and recommendations that could optimise a destination's potential and the use of food to boost tourism at a destination are shown in Figure 6.19.

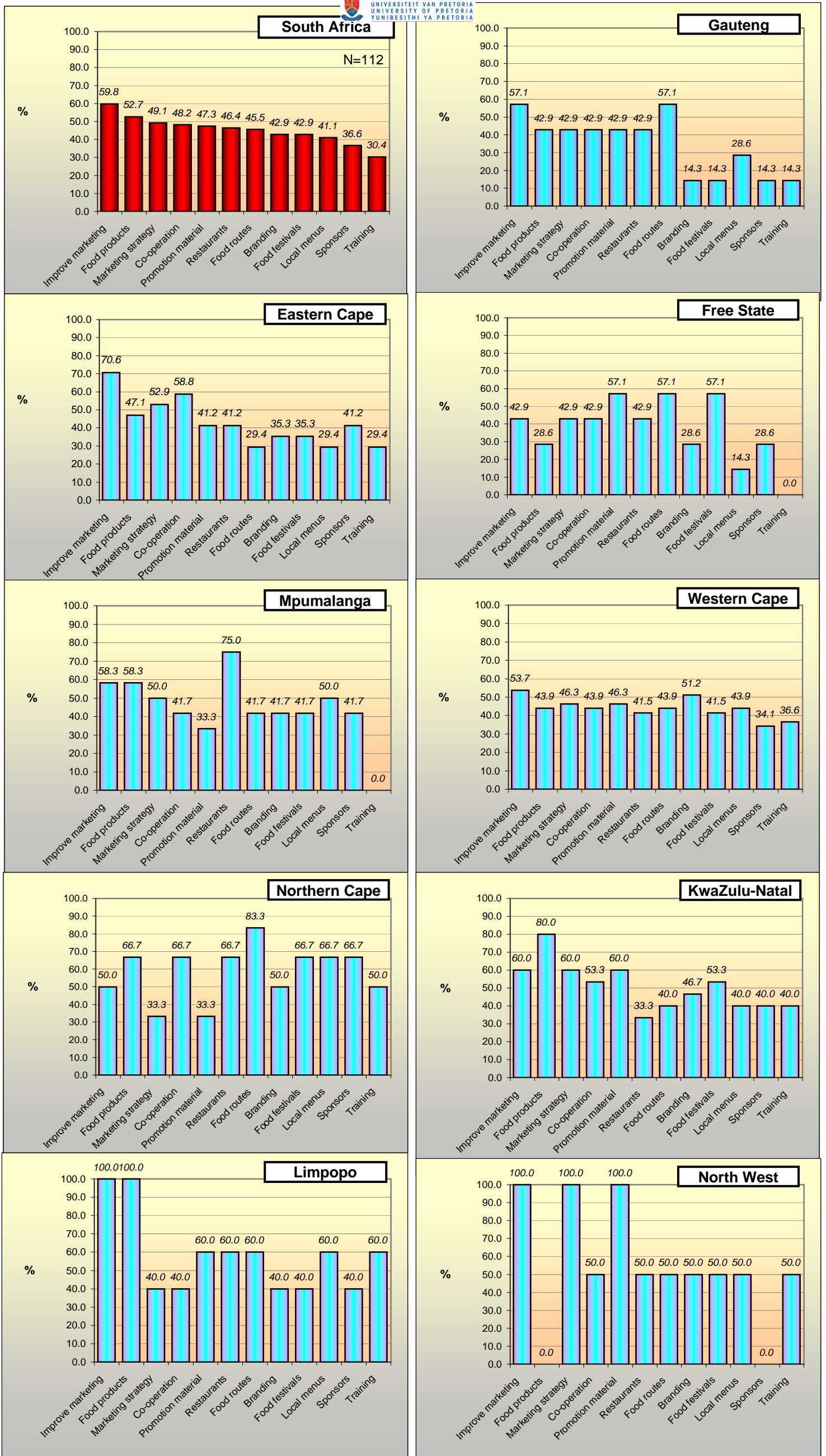


Figure 6.18: Proposed initiatives to address perceived gaps and constraints on a national and provincial level

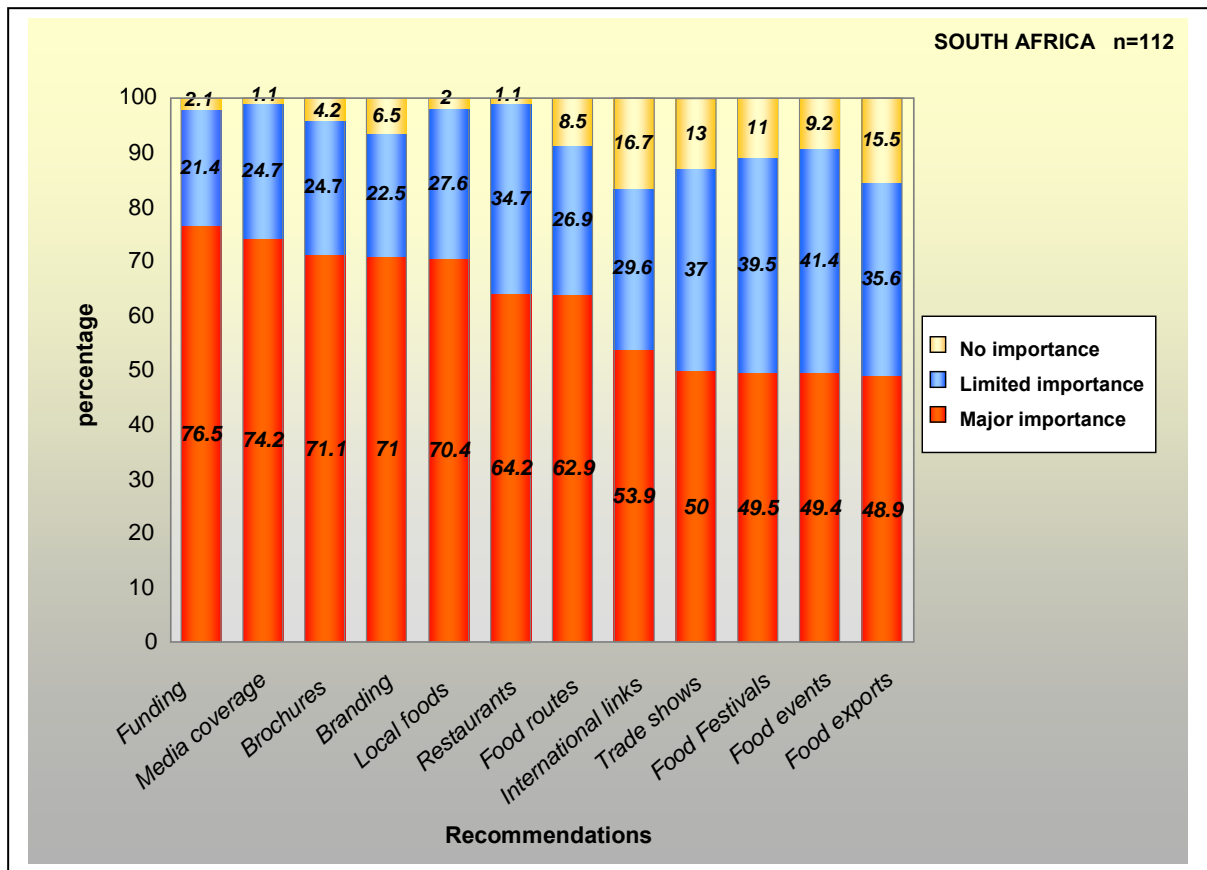


Figure 6.19: Stakeholder recommendations for future strategy development

Acquisition of funds (76.5%) is a major independent marketing strategy although also playing a crucial role in all types of promotional initiatives geared to promoting food tourism. Media coverage, brochures, branding, local food and restaurant promotion also stand out as very few respondents regard them as unimportant. Strategies related to the product (food routes; shows and festivals) are generally rated less important as are international links and export options. These findings bear out the proposition made by Rule *et al.*, (2001) that tourism spending on food and dining out in South Africa by international tourists (8%) and domestic tourists (24%), is substantial enough to warrant more aggressive marketing of food tourism as a form of niche tourism. Thus promotion of food tourism is advocated for destinations that have the resources (local food products /suitable providers), but that are not exploiting their full potential in this facet of tourism.

On a provincial level (Figure 6.20), funding was also a strategy that was regarded of major importance by most provinces. The Western Cape food routes scored the highest (89.2%). This could be attributed to the fact that the already existing wine routes are very successful and food tourism can be incorporated as an additional attraction.

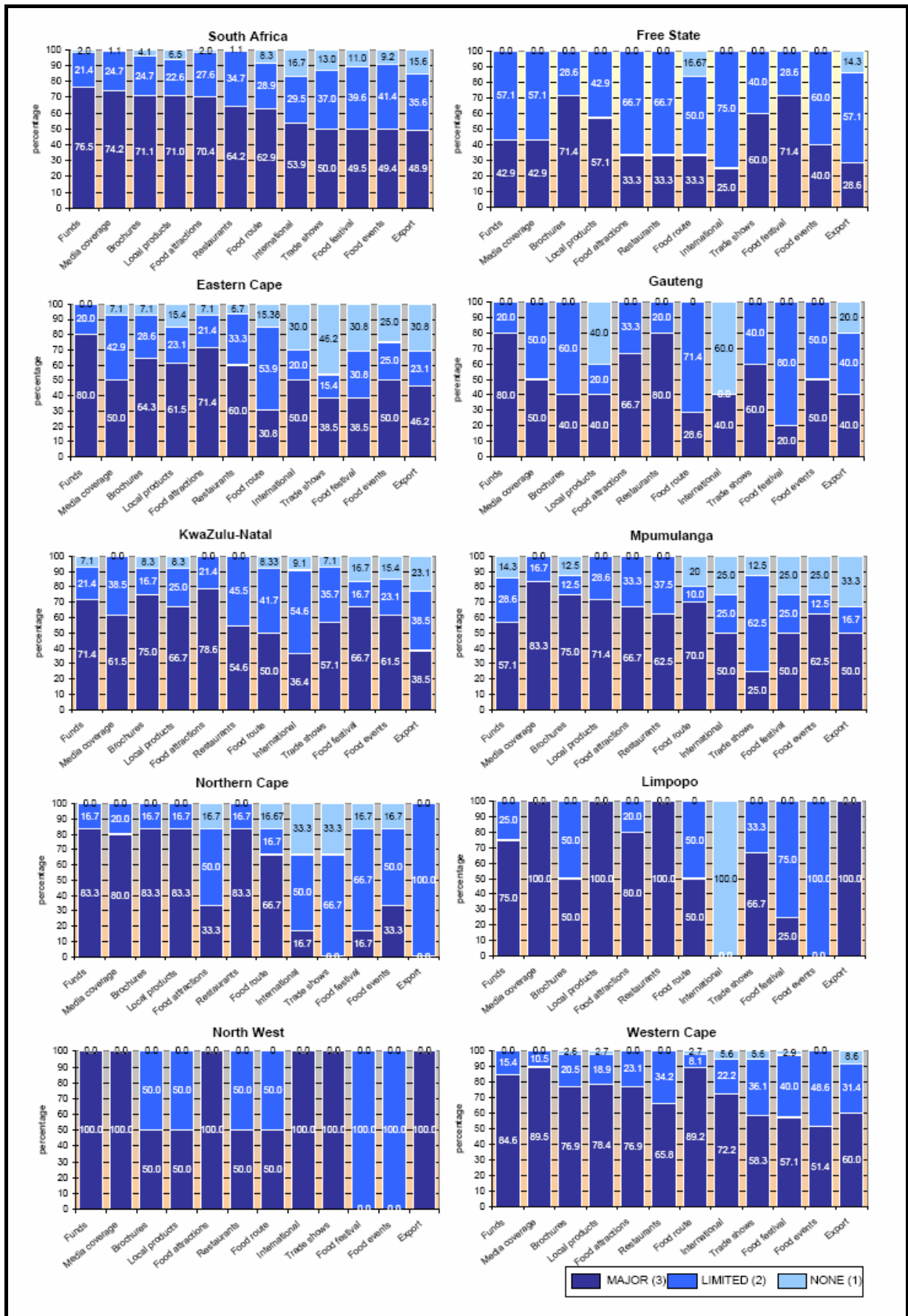


Figure 6.20: Stakeholder recommendations for future strategy development on a national and provincial level

The launching of food festivals (71.4%) scored well in the Free State that has the well-established cherry production celebration and its associated festivals. In Gauteng the promotion of speciality restaurants (80%) scored the highest. A possible reason for this could be the large number of visitors this province receives and the demand for showcasing local and regional food in this manner as food routes (28.6%) and food festivals (20.0%) are more difficult to offer. In these areas of marketing Gauteng had the lowest scores of all the provinces. These results show that each province and region needs to use the resources available to benefit food tourism by meeting the needs of the visitor coming to the destination.

If food tourism activities are based on attractions in which the natural landscape is the draw card, the importance of the type of attraction and event will differ. This was evident in the analysis of the stakeholder recommendations for future strategies. KwaZulu-Natal regarded the development of local and regional food (78.6%) as a special tourist attraction as most important, whilst Mpumalanga regarded media coverage (83.3%) as the highest priority.

Although various gaps (Figure 6.21) in marketing and food related issues were identified, specific actions and strategies were recommended. Of particular significance were the consistent higher ratings that the marketing and promotion-related aspects of food tourism received above that of the food product itself particularly in the areas of media coverage, food promotion and branding. The rating of strategies and actions as suggested by the results of this research, accentuate the importance of developing a focused marketing strategy and framework that includes food tourism in which the above mentioned areas are purposefully addressed.

6.5 EXPERT OPINION RESPONSE

The expert opinion refers to the qualitative component of this study, as semi-structured face-to-face interviews were executed with identified experts in the field of food tourism. The main purpose of the qualitative component of this study was to refine and confirm the results extracted from the DMO stakeholder survey, relating the situational analysis executed to determine the current usage of food as a destination attraction and marketing tool. The qualitative analysis comprised an inductive process of organising data into categories and identifying patterns. The data collected in the expert opinion surveys was transcribed and analysed by classifying, organising and coding the information, and placing it in a framework based on a checklist compiled from the semi-structured interview schedule as suggested in the work of Jennings (2001) and Veal (1997).

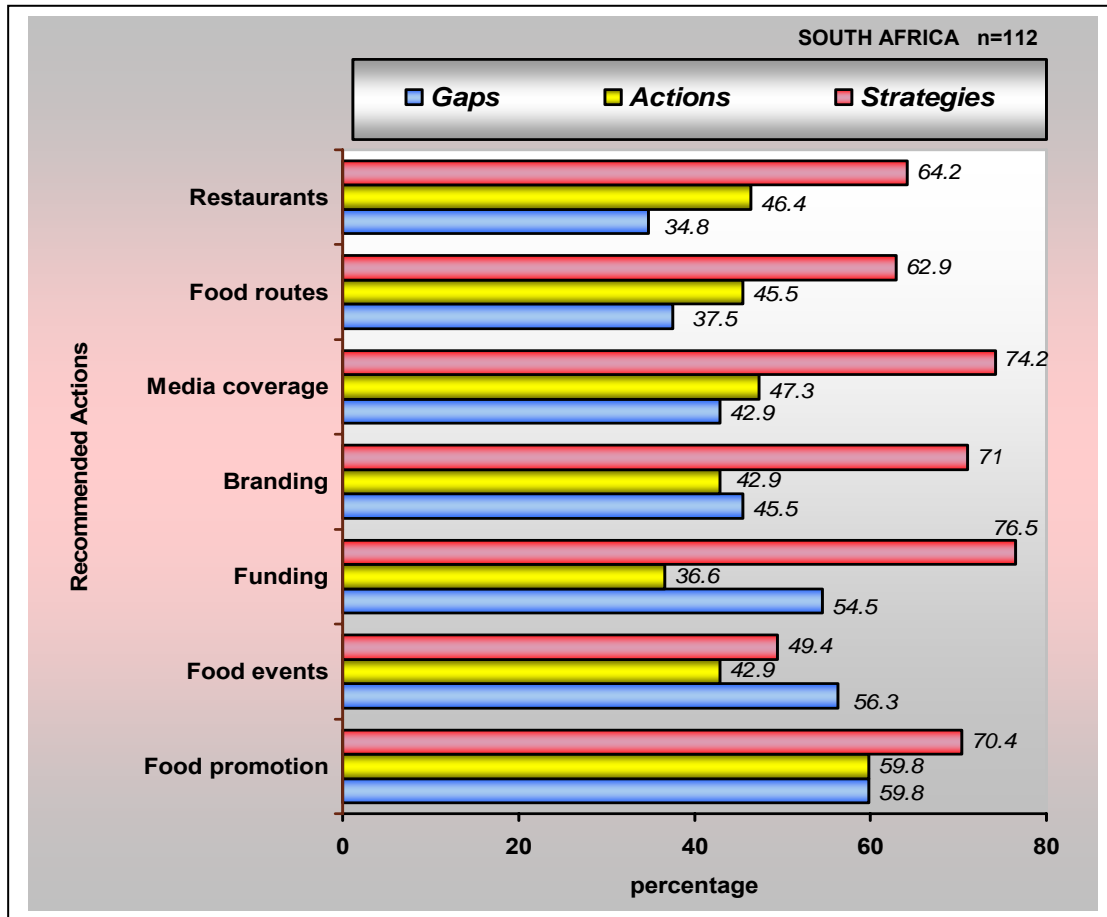


Figure 6.21: A comparison between actions, gaps and strategies regarding food tourism on a national level

The type of content analysis used was structuration, defined by Jennings (2001) as ordering the data according to a predetermined set of categories as determined by the questions and probes set in the semi-structured interview schedule.

The utilisation of semi-structured interview schedules facilitated a number of the steps usually executed when analysing qualitative data, namely the organisation, perusal, classification and synthesis which are the steps outlined in the data analysis spiral as discussed in Leedy and Ormrod (2005). The data collected from the expert opinion survey was classified and synthesized as the organisation, categorisation and pattern identification and was pre-determined by the semi-structured interview. The analysis was performed to identify core content and trends regarding food tourism planning, implementation and management in the food tourism industry and not to necessarily reflect individual opinions of the experts. To assess the qualitative data, the majority opinion was recorded with variances being indicated, where appropriate, to provide additional and in-depth perspectives of experts in the field of food tourism.

The data gleaned from the opinions of experts was compiled according to clusters identified in the self-administrated questionnaires that were completed by the DMOs, and reflected the key strategic perspectives of the experts interviewed.

6.5.1 Key Strategic Perspectives

Utilising the self-administrated questionnaires that were completed by the DMOs the data was clustered according to the main themes identified in the questions regarding the promotional gaps in food tourism; the actions required to address the gaps and constraints; and the possible strategies suggested to develop and implement food tourism in a destination. These themes were used to organise the responses from the experts so as to facilitate the integration of the data and to determine the similarities and differences between the DMOs and the experts in the field of food tourism. This information contributed to the compilation of the SWOT profile. Table 6.2 provides a summary and comparison of the elements and perspectives identified in the stakeholder questionnaires and the expert interviews. The various questions contained in both the stakeholder questionnaires and the expert interviews were grouped into six key elements regarding the perspectives, actions and strategies identified namely: product; marketing; finances; partnerships; exporting and training. Each group of elements was listed by identifying the highest percentage count obtained in the stakeholder questionnaire for each item of a specific element. Thereafter the additional items as identified by the experts were listed. In the majority of instances the item that was incorporated was also identified by the experts, thus verifying the information acquired from the stakeholder survey. The experts however did identify additional items in many of the elements regarding perspectives, actions and strategies. The verification and extension of the perspectives, actions and strategies by the experts is of major importance and needs to be incorporated in the guidelines for developing and implementing food tourism at a destination.

6.5.1.1 General views regarding food tourism

The general views concerning food tourism consisted of the description and understanding of the concept *food tourism* and the aspects that contribute to it. Food tourism was generally regarded as the promotion, marketing and branding initiatives to exhibit and showcase the food of the country to local and international tourists. The experts in the field of food tourism saw the key elements as a combination of food and wine related activities, based on culture and heritage. However, certain experts felt that the concept *food tourism* lacked definition and was not receiving sufficient attention from stakeholders and tourism specialists, hence it is regarded as the unexploited aspect of tourism.

Table 6.2: Summary and comparison of the elements and perspectives identified in the questionnaires and expert interviews

ELEMENTS IN QUESTIONNAIRE & INTERVIEW	PERSPECTIVES		ACTIONS		STRATEGIES	
	DMO	EXPERT	DMO	EXPERT	DMO	EXPERT
PRODUCT	% N=112		%N=112		%N=112	
Potential not promoted / FT not attraction	59.82	√				
Existing routes do not include food tourism	37.50					
Restaurants/local food	34.82	√				
Lack of knowledge of food/culinary heritage as tourism product	28.57	√				
Inconsistent quality /Low level of quality/ service standards	17.86	√				
Lack of pride in own cuisine/ quality of products		√				
Lack of recognition – chefs/ restaurants		√				
Best local products exported		√				
Promote the use of local products /			52.68	√		
Develop culinary tourism routes			45.54	√		
Implement menus reflecting local/regional cuisine			41.07	√		
Development of farm and Agritourism				√		
Develop a database to facilitate information sharing				√		
Develop local pride/sense of belonging				√		
Control of quality/ consistency of products / service				√		
Development of local/regional food as a tourist attraction					70.41	√
Development of a special food/wine tourism route					62.89	√
Launching a regional food festival					49.45	√
MARKETING						
No special food events	56.25					
No regional branding	45.54					
No media coverage	42.86	√				
Not included in promotional material	39.29	√				
Restaurant trade strongest marketer		√				
Signage lacking regarding FT attractions		√				
Improve marketing activities for FT/showcasing			59.82	√		
Develop a marketing strategy including FT			49.11	√		
Develop promotional material focusing on FT			47.32	√		
Establish/promote speciality restaurants			46.43	√		
Develop a branding identity for local/regional foods			42.86	√		
Promote food festivals / exhibitions			42.86	√		
Improved use of websites to promote FT				√		
Incorporation of culture / heritage				√		
Sporting events / conferences promote local cuisine				√		
Fast food/ delis medium for exposing local/regional cuisine				√		
On-theming with key attractions /food & wine				√		
Match products with market to meet consumer needs				√		
Media coverage for local /regional foods					74.19	√
Promotional material to accentuate role of local/ regional foods					71.13	√
Branding/marketing of locally produced food products					70.97	√
Promotion of speciality restaurants/eating places					64.21	√
Trade /consumer exhibition/shows					50.00	
Organising special food events					49.43	√
FINANCES						
Insufficient funds	54.46	√				
FT income generator / stimulate growth in hospitality sector		√				
Little support for entrepreneurs		√				
Source funding/sponsors			36.61	√		
Funds available to develop/promote food experience					76.53	√
PARTNERSHIPS						
Lack of co-ordination amongst stakeholders	29.46	√				
Lack of support from tour operators	19.64	√				
Establish co-operation between tourism and food stakeholders			48.21	√		
Identification and involvement of champions				√		
Networking and partnership strategy						√
EXPORTING						
Locally produced food products not exported	26.79					
Exporting of local products – unavailable locally		√				
Development of international links					53.85	
Exporting of local foods					48.89	
Regulation of exporting – local availability						√
LEGAL						
Laws prevent commercial product utilisation	8.93					
Laws preventing skilled chefs working in SA		√				
TRAINING						
Training opportunities growing		√				
Training to improve better food service standards			30.36	√		

The use of local and regional food provided sufficient potential for food tourism to develop and be implemented in South Africa as it offered new and unique experiences. The opinion was also raised that the diverse food culture of South Africa was not captured sufficiently and required understanding in order to make it more authentic and marketable for both local and international tourists. The majority of the experts interviewed regarded the promotion of the food as the central point of food tourism and felt that restaurants and the chefs played an important role. However, they also remarked that many chefs did not utilise local foods or have sufficient knowledge of the local culinary heritage and thus did not always allow restaurants to facilitate the promotion of local fare or showcase genuine South African cuisine.

Food tourism was definitely regarded as an income generator, as all tourists must eat. Furthermore, South Africa had sufficient and excellent local products to provide tourists with an authentic and different experience. More focus on service standards was, however, called for so as to lure tourists back on return visits, especially given the quality of food products and the different culinary experiences which, when combined with the key natural attractions, would provide first class experiences. Interactive culinary experiences were proposed, thereby combining a selection of resources to provide an eating experience and lasting memories.

Aspects contributing to food tourism in South Africa focused strongly on the variety of unique culinary experiences available in the country and especially the established wine industry that offered an opportunity for food to be combined with an already well-branded product. Equally important were natural landscapes, the primary attraction of South Africa, where food added value and had the potential to become an additional drawing card if packaged and marketed correctly. The components of food tourism included all the components as identified in the stakeholder questionnaire completed by the DMOs. Additional comments from the experts highlighted the use that could be made of celebrity chefs and good quality restaurants offering a wide variety of local foods. It was also suggested that food be more accessible and used to promote and contribute to the sustainability of small businesses. Ultimately, the focus of the total tourism experience should include the cuisine and the events to introduce tourists to a locality serving as a tourism destination.

6.5.1.2 *Perspectives regarding food tourism locally and nationally*

The perspectives regarding food tourism at local and national level are described in so far as that they provide additional dimensions to the situational analysis in terms of the present situation and utilisation of food tourism. The perspectives that are highlighted coordinate

with the elements identified in the DMO questionnaire and focus on aspects such as the product, marketing, exporting, finances, partnerships, training and the law as portrayed in Table 6.2. Moreover, identified gaps and constraints, strengths, opportunities and challenges too are included. That the potential for food tourism development exists is totally clear, as is the significance of the role and involvement of organisations in the enhancement of food tourism. The majority of the experts regarded food tourism as being underdeveloped, and an unknown concept, with little awareness amongst stakeholders of what it entails. They conceded that there was room for growth regarding food tourism as an attraction as it presented a wealth of opportunity for development.

The main reason for this situation was a result of insufficient marketing of food tourism as an attraction, often because of lack of knowledge regarding food and the role that it plays in tourism. The lack of pride in our own cuisine and the quality of local and regional products were the obstacles. International experts recommended that it was important for South Africa to capitalise on the uniqueness of the *South African melting pot* and not to compare the country to other gourmet destinations. Furthermore, the fact that tourists need to eat resulted in a low level of competitiveness often combined with low standards of quality and service.

The local and regional food tourism product was regarded as having an advantage globally as the quality and variety of products reflect a diverse food basket, an interesting and appealing cuisine, different and exciting, but yet appealing to the Western palate and affordable to most tourists. Many of the restaurants and talented chefs promote the local products and provide menus with a local flavour but do not get sufficient recognition in the media for their efforts. Subsequently the 'secret' of South African cuisine is still unknown globally and in many instances even locally. All of these aspects contributed to the uniqueness of South African cuisine, which, when based on the variety of cultures and marketed as 'new' experience, could compete with other stakeholders in the field of food tourism, such as Australia, which was mentioned as an example of best practice that could be adapted for the South African situation.

Marketing of food tourism, according to the experts, could focus on the showcasing of local and regional food products and incorporate the cultural heritage to accentuate its authenticity and to give it a context, but more importantly, to combine it with the already popular natural key attractions of South Africa. The strong and secure position of wine was an added advantage and although wine received more attention and was promoted more intensely as a tourism product, the experts suggested the on-theming of food with wine to gain in-roads

as a tourism product. DMOs often did not provide the tourist with sufficient information as to where to eat and what to eat and did not include such information of this nature in their promotional material.

The development of good websites and public relations, instead of print advertising, by DMOs and other tourism stakeholders are suggestions of best practice for marketing food tourism, from which South Africa could learn. Product placement at strategic attractions or through organisations closely involved with tourist activities, such as South African Airways and the South African National Parks Board, could showcase the local and regional cuisine of the country and contribute to sustainable competitiveness.

The exporting of local food products was an area of great concern to many of the experts. All felt that the best was not available at destinations and could therefore not be adequately showcased and, if they were procurable, it often happened that they were more expensive than the imported product of equal quality that was obtainable and for less. This was problematic for the local industry. The view of the experts regarding exporting is the opposite to that of the DMOs who felt that destinations would acquire increased exposure if their products were made available on the global market, whilst the experts opposed the exporting of the best local products which meant that they were not available for the local market. International experts supported the view of the local experts and recommended that South Africa should build on its existing profile of food and wine products to extend food tourism endeavours.

The lack of sufficient funds hampered the marketing initiatives of food tourism. The experts were adamant in their view that the allocation of available funds by DMOs was inappropriate regarding the allocation and availability of funds for food tourism by DMOs. Moreover the availability of funds was inadequate.

Partnerships and networking was voiced as a concern especially by the experts in the community tourism field, as they experienced few opportunities of being able to get involved in mainstream tourism and felt that a situation of exclusiveness existed that prevented their participation in food tourism opportunities. This situation was further complicated by the fact that the culinary knowledge and foodways of all cultural groups were not accessible, to all people, as a result of safety and security concerns and the ambivalence of many people regarding the knowledge of other cultural groups. The opinion was expressed that until we know ourselves, we cannot share the knowledge with the global world out there, which leads to superficial exposure of a food culture, often in the confinement of a tourism bus. Thus a

sharing and awareness of cultures was required. The opposite opinion, as expressed by one individual, was that *poverty should not be paraded but that the communities needed to determine what to offer the tourists that would make the difference*. This could be done by teaching or sharing the food culture with the tourists and simultaneously making it a sustainable proposition for the providers.

The general feeling amongst the experts was that the tourism organisations, local government bodies and other stakeholders do not do enough to support the development of food tourism. The promotion of food as an attraction featured mainly through the restaurant trade and the occasional food promotion organised abroad to showcase South African products. The underlying problem was that there were no real champions and no specific strategy for the development of food tourism as an attraction in the country and that the stakeholders had not yet grasped the importance and place of food tourism. A recommendation from the international experts was to create partnerships on national level with linkages between provinces and tourism regions. A united effort would prevent infighting and achieve *selling South Africa first* where the experience of the different regions could be promoted.

Training was regarded as an important aspect with the experts, which was in contrast to the findings reported in the DMO questionnaires. The experts felt that many young people were interested in the hospitality industry as a result of growth in that area. Many training opportunities have also become available as the country has experienced an increase in the establishment of training institutions and the competition was improving the quality of training. Recommendations were also made regarding the importance of product knowledge of staff members whilst selling *food tourism*.

Safety and security was a concern of some of the international experts, as this aspect would feature in people's decision-making prior to selecting the destination just because of the cuisine. An additional constraint was the legal restriction preventing skilled people such as chefs from working in South Africa - this prevented the exchange of skills. The establishment of exchange programmes would invite new talent to this country and simultaneously afford local talented people the opportunity to expand their knowledge and skills.

6.5.2 Suggestions Regarding the Development, Organisation and Marketing of Food Tourism Locally and Internationally

Experts in the field of food tourism made the following suggestions regarding the development, organisation and marketing of food tourism locally and internationally.

6.5.2.1 *Development*

- The need for a proper **management framework** and a **national strategy and action plan**, that is industry driven, and has a long-term commitment from both government and industry, can advance the initiatives regarding the development and implementation of food tourism.
- The development of a **database** is required to facilitate the sharing of information and to provide the correct information.
- The development of **farm and agri-tourism** can offer a good platform for the development of food tourism as these initiatives can be **on-themed** and inherently support one another.
- **Types of attractions** that can be developed include culinary tours and food festivals. Sports events also provide ideal opportunities to utilise the local and regional food as an additional attraction and income generator. Conferences were also becoming a drawing card for tourism and the ideal opportunity to showcase local and regional cuisine to both local and international tourists. Route marketing posed the ideal format for food tourism development and implementation. Fast food could also offer more of a local flavour. Additionally, the undeveloped attractions can also be a drawing card, which can add additional strength as an attraction in the food tourism arena.
- Create **culinary tour packages**, which offer a variety of different experiences integrating food and non-food activities, such as fine and casual dining, farmers' markets, wineries, food production and processing.

6.5.2.2 *Organisation*

- Food tourism in the Western Cape is growing and Franschoek is a **blueprint** of how it should be done.
- Tourists were asking for **South African products** and wanted to sample **local foods**; international chefs wanted to use local products. This could help to put South Africa on the map regarding food tourism.

- The experts stressed the fact that it was necessary to give regions a **sense of belonging and to develop local pride**. Food tourism must be regarded as an income generator and catalyst to stimulate growth in the hospitality industry. It has all the right ingredients, namely products, talent, settings, consumer acceptance and demand to create a food style distinctly South African for which local entrepreneurs can take ownership and develop a South African cuisine that will appeal to modern society.
- The experts suggested that, to develop food tourism, **local products** must be made available and the quality, consistency and reliability must be controlled. They also highlighted the problem of local products being exported and being expensive locally. A lack of big fresh produce markets in certain regions was a drawback both from a production point of view and as a tourist facility. Smaller farmers markets were available but not always well organised nor consistent in the delivery of products.
- Little **support** existed or was available for entrepreneurs in the hospitality trade such as restaurateurs, who wished to open eating-places. Therefore it was crucial to establish strong linkages between industry and the public sector to encourage policies and development that could support food tourism development across the regions.
- The **networking** amongst stakeholders and the need to develop partnerships was one of the major gaps and constraints highlighted by the experts.
- Tour operators and stakeholders in the hospitality industry should be better **informed** about the potential of food tourism and acquire knowledge regarding the local and regional food products, culinary heritage and foodways of the different cultural groups of South Africa. These are the differences that make the tourism product unique. Measures should be taken to prevent tourists from receiving incorrect information and being exploited.
- The growth in tourism to South Africa has resulted in the hospitality sector developing and expanding thus creating a wealth of job opportunities. However, the **training** of people with adequate skills and sufficient knowledge is not meeting current requirements and this results in an inadequate service culture, lack of pride, commitment and low standards.

6.5.2.3 *Marketing*

- A clear development strategy could prevent an over dependence on marketing, as marketing alone would not bring success. The marketing plan needed to include a long-term strategy and a clear vision of where food tourism would be in 10-12 years.
- **Champions** need to get involved with the marketing and promotion of the local and regional foods, and the role it can play in food tourism, as very little is being done to

promote SA cuisine on a global level. Support from both the industry and Government would be required to achieve success.

- The experts concluded that food tourism offered the ideal **branding opportunity** and functioned as a value adder, as each region could market and promote its own specialities, by focusing on the differences thereby branding the region and identifying the wide variety of eating experiences available in South Africa. However, it was important not to send out complex messages, which could create confusion with tourists, but to select the product that distinguishes it from those of neighbouring countries and ensure that it is easily recognisable.
- **Wine** was already recognised as a speciality product but had to be promoted in tandem with food as globally this combination of products has achieved success in destinations such as Australia and California.
- **Signage** was lacking in many areas and this has resulted in various opportunities for showcasing local products and attractions being missed.
- **Publication and promotional material** alone does not promote food tourism and is an area that needs attention so that tourists can be provided with information as they enter the country or a specific region. Furthermore, structured **websites** can be used to promote food tourism, as is the case with certain of the regions in the Western Cape.
- For success it is imperative to **match products with markets** to meet the needs of the consumer and create a better understanding of the tourist as far as their culinary needs and desires are concerned.

6.5.3 Possible Strategies

Possible strategies to optimise the role of food tourism were proposed by both the DMOs and the experts. The strategies of major importance are portrayed in Table 6.3 and once again focus on the specific elements as identified.

Sustainability was the aspect most stressed by the experts and this involved both the stakeholders and the products used to offer food tourism as an attraction. Of major importance was the fact that the marginalised groups needed to be mentored and supported regarding the opportunity to be involved in food tourism and that entrepreneurs be supported financially. Food tourism has the ability to attract business, as all tourists need to eat thus there is a demand to be met and could demand attention to product development and marketing.

All stakeholders should be involved in a properly **structured and focused strategy**, which focuses on the development of the correct products as identified by market matching and meeting the needs of the consumer. This could entail improved networking amongst stakeholders; a more focused marketing approach involving the development of publicity material; improved use of websites; creation of a local/regional identity; promoting and branding of local products, talent, facilities and services; and the establishment of specific standards and control measures to ensure consistency in products and service.

The experts, however, also warned of **over-commercialisation**, but suggested the development of a mixture of products that would meet the needs of the tourist, by offering a unique and different product, thereby retaining authenticity and not offering contrived experiences. Australia was mentioned as an example of an international best practice that had achieved success in positioning food tourism as a lifestyle product and component of a total tourism experience.

Following these suggestions and putting them in context with the results from the DMO survey would assist in changing the South Africa situation from being unrecognised to being sought after as a gourmet destination. Putting the focus on food, more specifically the local and regional products, and the different and unique eating experiences, could provide food tourism with the opportunity of becoming a recognised tourism attraction at the destination level.

6.6 CULINARY DATABASE: FOODPAT

The data gathered for this study is contained in three different datasets, the Stakeholder Survey, the Expert Opinion Survey and the compilation of FOODPAT, together with TOURPAT, which were integrated to determine the need for the development of the Strategic Food Tourism Destination Marketing Framework. The integrated data was also applied in the selection of the case study and the subsequent application of the Strategic Food Tourism Destination Marketing Framework. The results of the Stakeholder Survey and the Expert Opinion Survey were reported and discussed in Section 6.4 and Section 6.5. The data captured from secondary data sources and contained in FOODPAT are presented in this section.

The data was collated from the individual scores for every variable in each main-field and sub-field as reflected in Annexure 8 and as portrayed in the Microsoft Excel FOODPAT tables available in the FOODPAT database. Table 6.3 is an example of a section of the data

collected in FOODPAT and is used to illustrate the presence and distribution of the variables contained within FOODPAT.

Table 6.3: Representation of the scores allocated to the sub-fields and main-fields in FOODPAT

Province	T-CODE	REGION	Area	Township	Farm	Factory	Product	Tot C_Tours_WC	C1-Yes=1; No=0	Food	Wine	Wine & food	Beer	Harvest	Area	Activity	Tot C_Festivals_WC	C2-Yes=1; No=0	Agricultural	Food industry/trade	Wine	Cuisine	Tot C_Shows_WC
V76	V77		9DC001	9DC035	9DC002	9DC003	9DC004	9DC005	9DC006	9DC007	9DC008	9DC009	9DC010	9DC011	9DC012	9DC013	9DC014	9DC015	9DC016	9DC017	9DC018	9DC019	9DC020
Western Cape	2	CAPE METROPOLITAN TOURISM	0	0	0	0	0	0	0	0	1	1	1	0	0	1	4	1	0	1	0	0	1
Western Cape	3	CENTRAL KAROO	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	1	1	0	0	0	1
Western Cape	4	GARDEN ROUTE	1	0	0	0	1	2	1	1	0	1	1	0	0	0	3	1	1	0	0	0	1
Western Cape	5	KLEIN KAROO	0	0	0	0	0	0	0	0	1	0	0	0	1	0	2	1	0	0	0	0	0
Western Cape	7	WEST COAST	0	0	1	0	0	1	1	4	0	1	0	1	2	1	9	1	5	0	0	1	6
Western Cape	1	BREEDE RIVER VALLEY	1	0	1	3	1	6	1	0	3	2	0	1	0	1	7	1	2	0	2	0	4
Western Cape	6	OVERBERG	1	0	1	1	2	5	1	7	0	2	0	0	0	0	9	1	4	0	0	0	4
Western Cape	8	WINELANDS	1	0	1	0	0	2	1	3	2	2	0	1	0	0	8	1	1	0	0	0	1
Total_Main_Field									16							43							18
TOTAL_WC		Total_Subfield	4	0	4	4	4			1	7	9	2	4	3	3			1	4	1	2	1
									5									8					
									out of 8 regions									out of 8 regions					

The calculation of the scores for each variable in each sub-field and main-field were allocated as follows:

- A score of [1] is allocated for each instance the specific variable is present in the region. For example the score calculated in the Winelands for festivals is 3 for food tours [3] plus [2] for wine plus [2] for wine and food plus [1] for harvest festival which gives a sub-total of [8]. The scores for each region appear in the Total C “Festivals” column and the final total for all the regions is reflected as the Total Main-Field, 43 which represents the total number of festivals in all the regions in the province. Thus for the category festivals in the Western province the score was [43] out of 56 which is the sum of all the regions in the province multiplied by the number of products in that specific category [8 x 7 = 56]. These calculations are performed for every region, in every province for every main-field and sub-field as reflected in Table 6.3 where the data for the Western Cape is portrayed.

- In the Yes/No column, the presence of the variable scores [1] and the absence of the variable scores [0] regardless of the total score calculated. The reason for the scoring of [1] if the variable is present and [0] if the variable is absent is to facilitate the determination of food tourism competitiveness in each region in a simple, easy and uncomplicated manner. This procedure facilitates the use of FOODPAT as a strategic tool by DMOs and stakeholders wanting to develop and implement food tourism in their regions.
- The presence of the variable for each region in the specific province is indicated by [1] and the total for the province is calculated by adding all the regional scores together. For example in the Western Cape all eight regions offer food related tours, therefore the Western Cape scored [8] 'out of 8 regions'. The indication of the presence of the variable in the various regions is important as it is possible to determine the competitiveness regarding food tourism for the specific region and province in this manner.
- The presence score for each sub-field, namely all the sub-fields for A, were added together to calculate the sum of Food Products (A). Likewise this was done for sub-fields B and C. The sum of A [B/C] was calculated for each individual region in each province and then the average for the province was calculated. For example, for the eight regions in the Western Cape the sum of A was 41, the percentage was 64% and the score for A was 3, as reflected in Section 6.6.1 in Table 6.5. These scores are an indication of the potential for food tourism regarding the food product resources. Dividing the total sum of the Food Product score by the number of regions in the province and calculating the percentage, determined the calculated percentage. The percentage score was divided into quarters as indicated below in Table 6.4 with an allocated score of 1 to 4.

Table 6.4: Indication of the percentage scores

Percentage score	Presence/Potential	Allocated score
75 - 100	Excellent	4
50 – 74.9	Good	3
25-49.9	Moderate	2
0 –24.9	Poor	1

- The score of 1 to 4 that each region and province received indicated the potential for food tourism in each category A, B and C and presented in Tables 6.5 to 6.7.

The scores calculated in FOODPAT reflect the presence/absence of variables for each region and cumulatively for each province; each variable is reflected in detail regarding individual and total scores for every sub-field and main-field on a regional and provincial level. This information can be utilised by stakeholders and DMOs in strategic planning for the development and implementation of food tourism in a destination and is available in the FOODPAT database.

The following sections provide the information from FOODPAT with regard to food products (A); food attractions (B); and food events and activities (C). Provincial total scores (Tables 6.5 to 6.7) indicate the potential of A/B/C respectively. The maps portray the information spatially, providing more detail about the potential of A/B/C on a tourism region level. The aim of portraying the information spatially at the tourism region level was to allow for application of *neighbourhood analysis*, which is a key function provided by GIS and not easily offered by any other decision support tool (Nath, Bolte, Ross & Aguilar-Manjarrez, 2000:246). *Neighbourhood analysis* according to Nath *et al.* (2000:246) is the capability to evaluate the characteristics of an area that surrounds a specific location (region/province). Aspects such as the identification and assessment of the availability of resources, on-theming possibilities, accessibility and infrastructure were important features established by this analysis. The horizontal bars provide a more detailed graphic representation of the presence of A/B/C, as the percentage breakdown of the main-fields of A/B/C is presented for each of the provinces. By applying these techniques, a closer identification of opportunities and strengths in the region resulted, as the A/B/C main-fields gave an indication of the position of each sub-field in a region. For example, in certain provinces all food products were present and in others like Gauteng only the production of alcoholic beverages was apparent.

The three different formats of data presentation allow for a thorough, yet easily executed manner of assessing the potential for food tourism in terms of the resources available, the attractions and events and activities that are taking place at a destination. The presentation of the data functions as a strategic tool that can be used by DMOs and other stakeholders while developing and implementing food tourism.

6.6.1 Food Products (A)

The potential for food tourism in the provinces is summarised in Table 6.5. Calculated scores for many fields and an analysis of the presence of food products as a resource give an indication of the concentration and distribution of food products according to specified categories. The availability of food products provides opportunities to showcase local and

regional foods and can be used as a tool in destination marketing initiatives. Additional activities, events and attractions can be developed when the agricultural (natural) or manufactured (processed) products are available as presented in Annexure 4.

Table 6.5: The regional presence and concentration of food products on a provincial level

Province	Number of Tourism Regions	Sub-fields								Total	Main-field X region (8 X no Tourism Regions)	% Presence of food products (41/64) 100	Food product presence Score (Categories 1-4)
		Livestock	Seafood	Fruit	Vegetables	Grains	Other products	Produced goods	Alcoholic beverages	Regional presence of food products			
Western Cape	8	7	5	7	6	4	1	4	7	41	64	64.0	3
North West	5	2	0	2	2	3	1	0	1	11	40	27.5	2
Limpopo	4	2	1	3	2	2	3	2	0	15	32	46.8	2
Northern Cape	6	6	1	2	0	4	1	4	0	18	48	37.5	2
Mpumalanga	8	2	0	4	4	4	2	4	2	22	64	34.4	2
KwaZulu-Natal	8	4	1	2	1	2	2	0	0	12	64	18.7	1
Gauteng	6	0	0	0	0	0	0	0	1	1	48	2.1	1
Free State	4	2	0	2	2	4	4	0	2	16	32	50.0	3
Eastern Cape	6	4	1	3	1	1	2	3	0	15	48	31.2	2

The Western Cape and the Free State both scored [3] indicating a good presence of food products. The Western Cape had relatively high scores in all the sub-fields regarding food product resources. Regions and provinces are, however, do not utilise food produced only in their specific regions. For example, in Gauteng, food is regarded as a key attraction (Table 6.5) even though food product production has a minimally low score. The offering of food as an attraction at a destination is an amalgamation of goods and services, where the presence of the product enhances the potential but operational initiatives are also an essential input. A map (Figure 6.22) portrays the intensity of the presence of food products in South Africa's tourism regions.

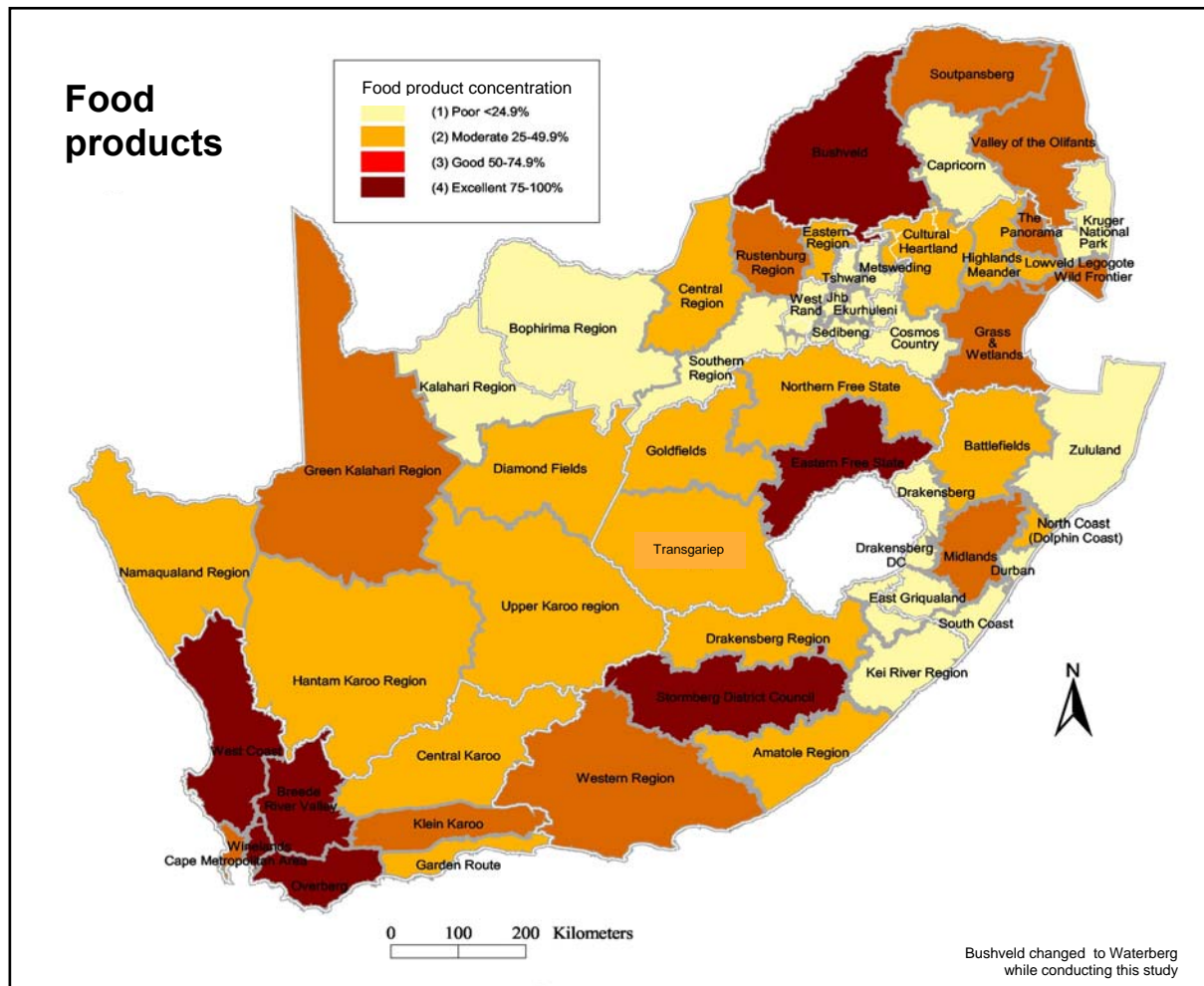


Figure 6.22: The presence and concentration of food products in the tourism regions of South Africa

As can be seen the number of regions with a high food product presence and concentration is very limited and that the greatest part of the country has but moderate potential. The production of food products will facilitate food tourism, as events and attractions can be developed around the food product. The product can also be marketed as a local or regional food, but it is not essential for food production to be present for food tourism to be developed and implemented. Nearby assets can be utilised and transported to the area as required, which is what has happened in Gauteng, where food production is low, tourism is high and food is a key attraction.

The chart in Figure 6.23⁵ provides a percentage breakdown of the main-field, namely the food products, into the sub-fields, alcoholic beverages, agricultural produced goods, other agricultural products, grains, vegetables, fruit, seafood and livestock. This provides for a more detailed analysis of the food resources present in a province. Such an analysis provides information for DMOs with regard to the choice of product on which to focus and to identify the nature of attractions, activities and events to promote food tourism. Furthermore, the offering of local products in restaurants can be more readily encouraged if the food products are available and produced in the area.

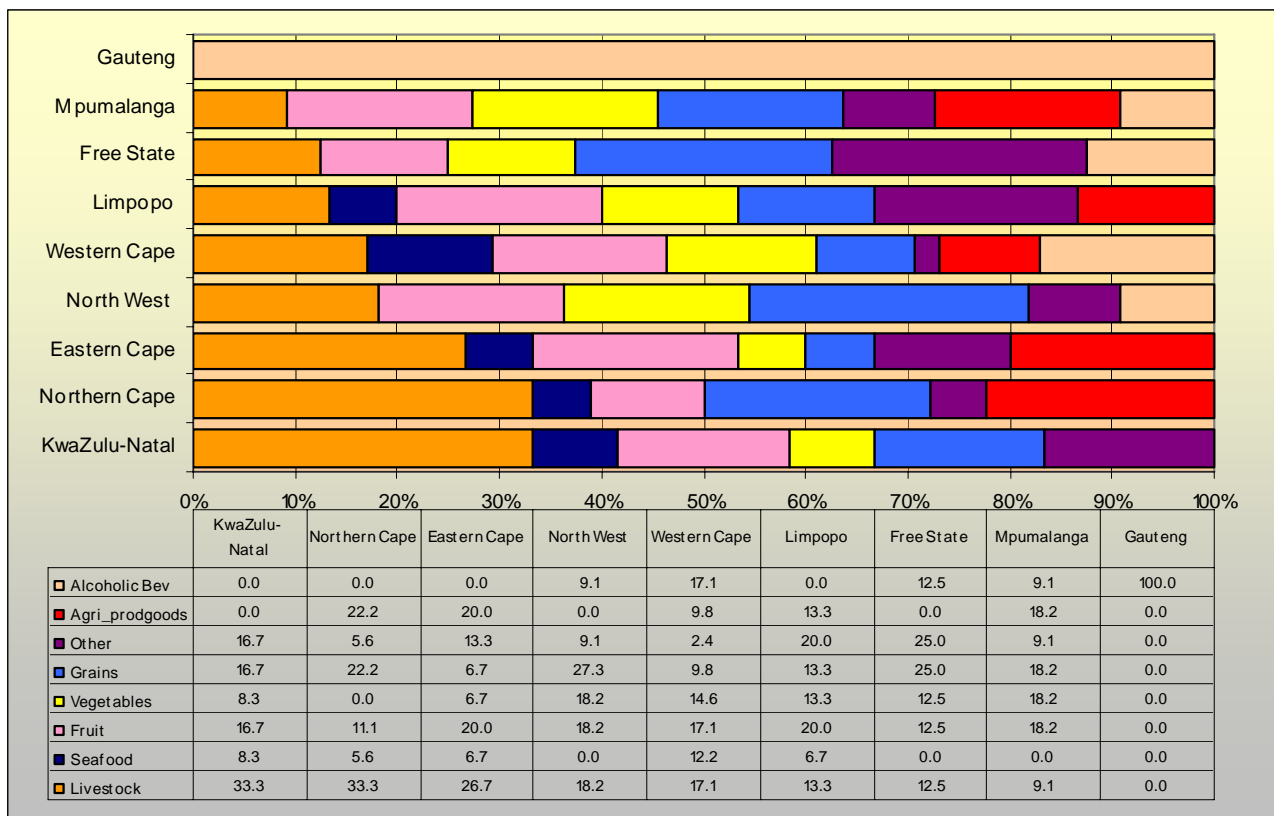


Figure 6.23: The percentage distribution of food products within the provinces

6.6.2 Food Attraction information (B)

The presence and concentration of the main-field, food attractions, is presented in Table 6.6. It includes facilities, factories, farms, cultural villages, restaurants and the use of local products which constitute the amenities offered to tourists when they visit a destination and are incorporated in food tourism related attraction packages. The food attractions in a destination are developed or established as a result of the resources in the region, the inhabitants of the area and the established amenities.

⁵ The horizontal bar graphs in Figures 6.23, 6.25 and 6.27 read from left to right and the table legend for each graph reads from bottom to top

As reflected in Table 6.6, the Western Cape scored the highest in South Africa and food attractions in this province are present in all of the sub-fields. This province is therefore in an extremely favourable position regarding the development and implementation of food tourism.

Table 6.6: The regional presence and distribution of food attractions on a provincial level

Province	Number of Tourism Regions	Sub-fields							Total	Main-field X region (7 X no Tourism Regions)	% Presence of attractions (49/56) 100	Attraction presence score (Categories 1-4)
		Facilities	Factories	Farms	Cultural Villages	Restaurant: Type of cuisine	Use of local products	Restaurant: type of place				
Western Cape	8	8	5	7	5	8	8	8	49	56	87.5	4
North West	5	2	0	0	3	2	2	3	12	35	34.2	2
Limpopo	4	1	0	4	3	4	1	3	16	28	57.1	3
Northern Cape	6	4	3	3	5	4	1	3	23	42	54.7	3
Mpumalanga	8	3	1	4	3	4	3	4	22	56	39.2	2
KwaZulu-Natal	8	4	5	5	6	5	4	7	36	56	64.2	3
Gauteng	6	3	0	4	4	4	3	4	22	42	52.3	3
Free State	4	4	3	4	2	1	1	4	19	28	67.8	3
Eastern Cape	6	0	2	3	3	4	2	2	16	42	38.1	2

The high score achieved by the Western Province in main-field A, which represents the presence and availability of food products underscores the fact that in this province the presence of food attractions would facilitate the food tourism offering. In five of the provinces food attractions are well represented providing favourable conditions for many of the regions to offer food tourism. In most of the provinces there are definitely opportunities for food tourism, as food attractions are present although they might not be marketed as such.

A map (Figure 6.24) provides a spatial portrayal of the food attractions in all the tourism regions within South Africa. The positive aspect emerging is that the majority of the country's regions have attractions that can be used for the development and implementation of food tourism. Neighbouring regions that reflect a lower potential can be included in specifically planned and marketed food tourism strategies, such as food routes based on resources, the inhabitants and amenities offered in the province as a whole.

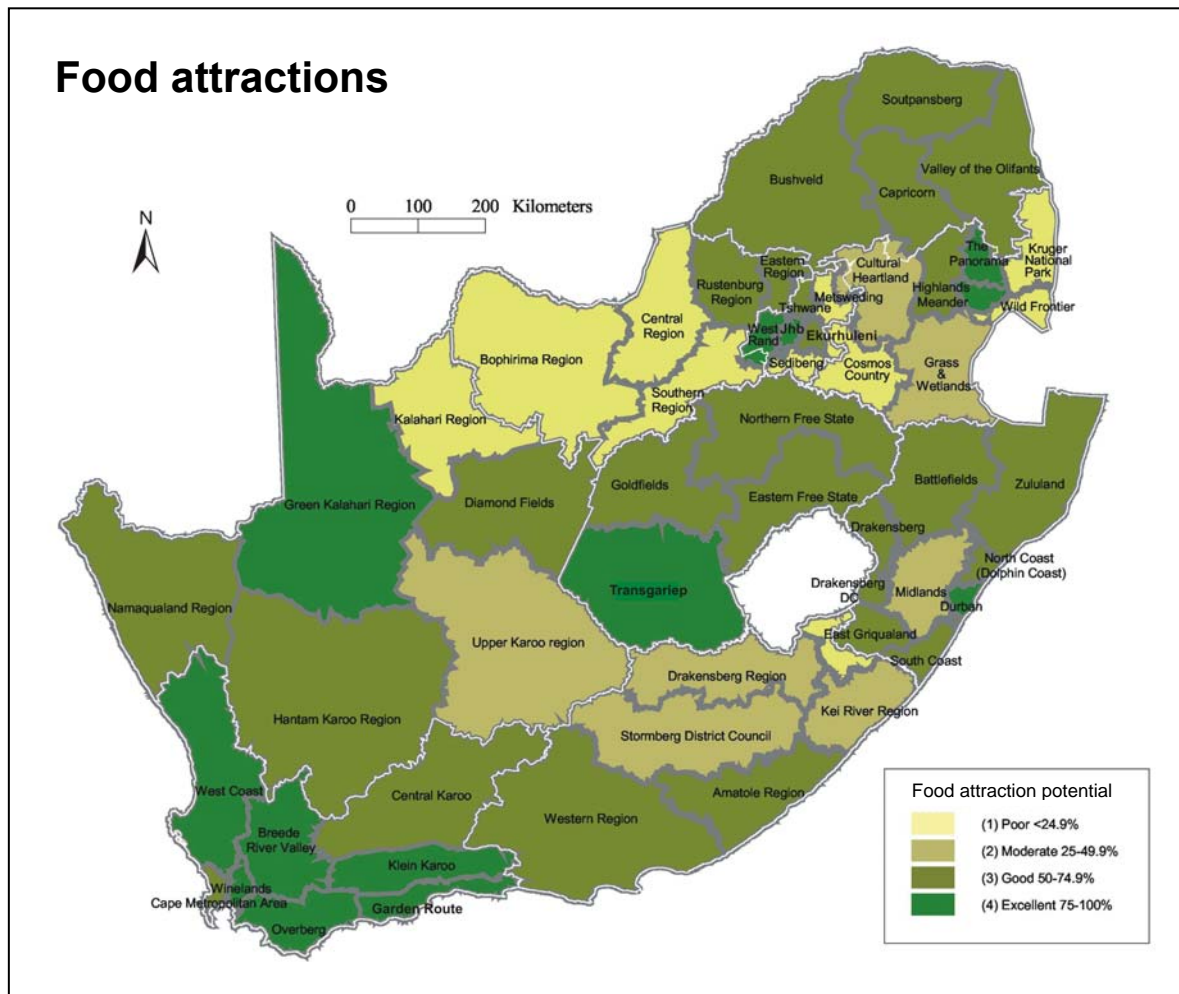


Figure 6.24: The presence and concentration of food attractions in the tourism regions of South Africa

Regions showing an excellent presence are distributed in pockets across the country with a higher presence in the Western Cape, where food tourism has received more attention than in most other regions.

An important aspect illustrated in the chart (Figure 6.25) showing the percentage breakdown of the food attractions present in each province, is the fact that all the provinces use local products in their restaurants even though the percentage might not be that high in the Free

State, Northern Cape and Limpopo. Since agricultural production is an important economic sector in these provinces, there is considerable potential for food tourism development especially in the Free State where in certain regions, events and attractions have been developed based on the presence of the agricultural product for example the cherries and asparagus. Limpopo could also qualify with its tropical climate and strategic location on a variety of popular tourist routes. Furthermore, amenities such as restaurants, cultural villages and farms producing local foods are prevalent in all the provinces and can be incorporated in food tourism development plans. The utilisation and marketing of available facilities and attractions for food tourism has not reached their full potential in the provinces according to results from the analysis of questionnaire responses and substantiated by the results reflected in Figure 6.25.

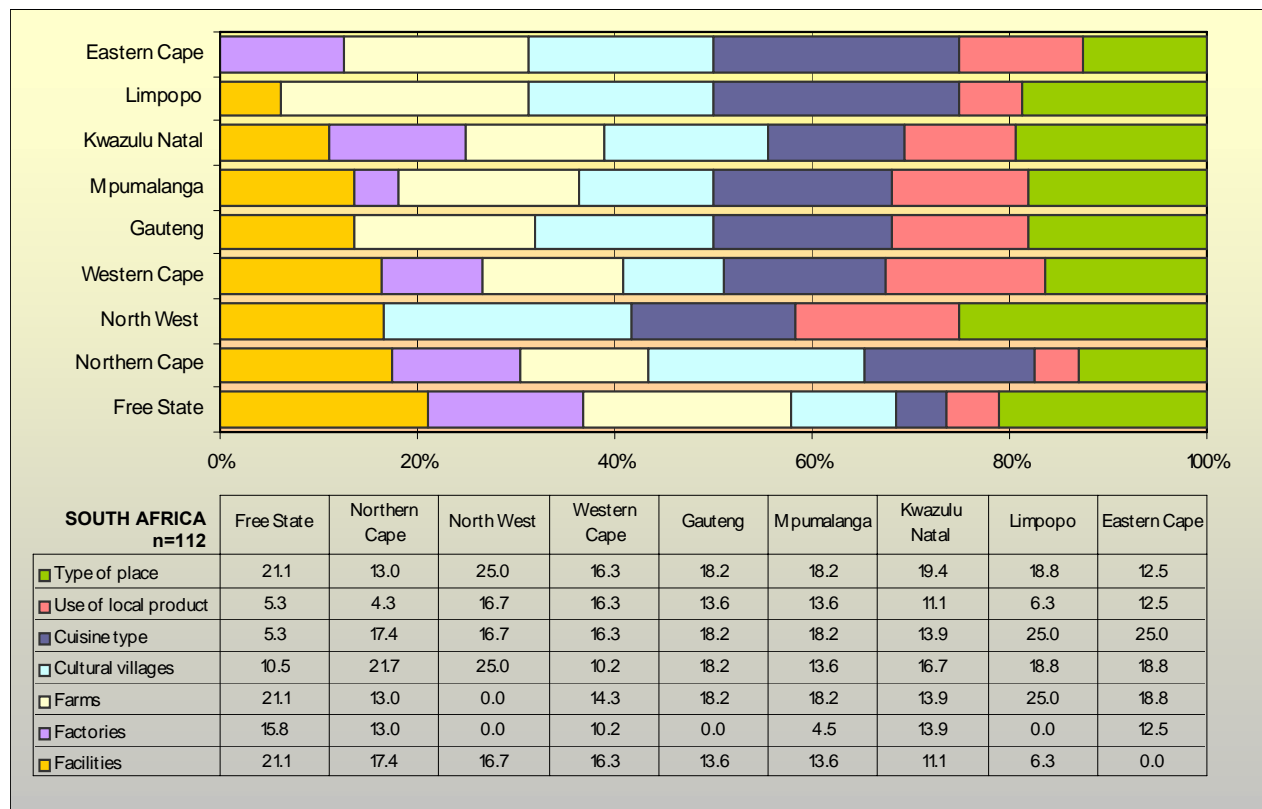


Figure 6.25: The percentage distribution of food attractions within the provinces

6.6.3 Food Events and Activities Information (C)

The presence and concentration of food events and activities in the various provinces is illustrated in Table 6.7. The main-field food events and activities include all the special actions that are organised around food to provide the tourist with an experience of local and regional foods and the attractions they provide. Tours, festivals, shows, markets, and special

routes are all examples of such events and activities and are the ways in which the resources of a region or destination are promoted and marketed. Such events and activities also showcase the local and regional resources and often contribute to networking in the community and region.

Food events and activities as shown in Table 6.7 are well represented as three of the provinces scored four and a further three scored three.

Table 6.7: The regional presence and distribution of food events and activities on a provincial level

Province	Number of Tourism Regions	Sub-fields					Total	Main-field X region (5 X no Tourism Regions)	% Presence of events (34/40) 100	Event presence score (categories 1-4)
		Tours	Festivals	Shows	Markets	Routes				
Western Cape	8	5	8	7	7	7	34	40	85.0	4
North West	5	2	2	1	4	2	11	25	44.0	2
Limpopo	4	2	2	1	4	4	13	20	65.0	3
Northern Cape	6	4	5	4	6	5	24	30	80.0	4
Mpumalanga	8	4	3	0	6	5	18	40	45.0	2
KwaZulu-Natal	8	5	5	0	7	6	23	40	51.0	3
Gauteng	6	2	1	0	4	2	9	30	30.0	2
Free State	4	2	4	2	4	3	15	20	75.0	4
Eastern Cape	6	3	2	4	5	4	18	30	60.0	3

The presence of food events and activities with a good to high score in two thirds of the country portrays a positive image regarding the potential of developing and implementing food tourism in South Africa. The ability to offer food events and specific food orientated activities depends on the presence of resources and the attractions that have been developed. However, the lack of resources, attractions and events in a region or province

regarding food tourism do not necessarily restrict food tourism at a destination as is clear in Gauteng, where food tourism is regarded as a key attraction although it does not possess the same level of potential regarding resources and events. Once again the opportunity to on-theme food tourism to other attractions and types of tourism can enhance the development of food tourism as an attraction even further in South Africa.

A map (Figure 6.26) provides a spatial portrayal of the food events and activities present in all the tourism regions within South Africa and shows they are well represented in many of the tourism regions in South Africa.

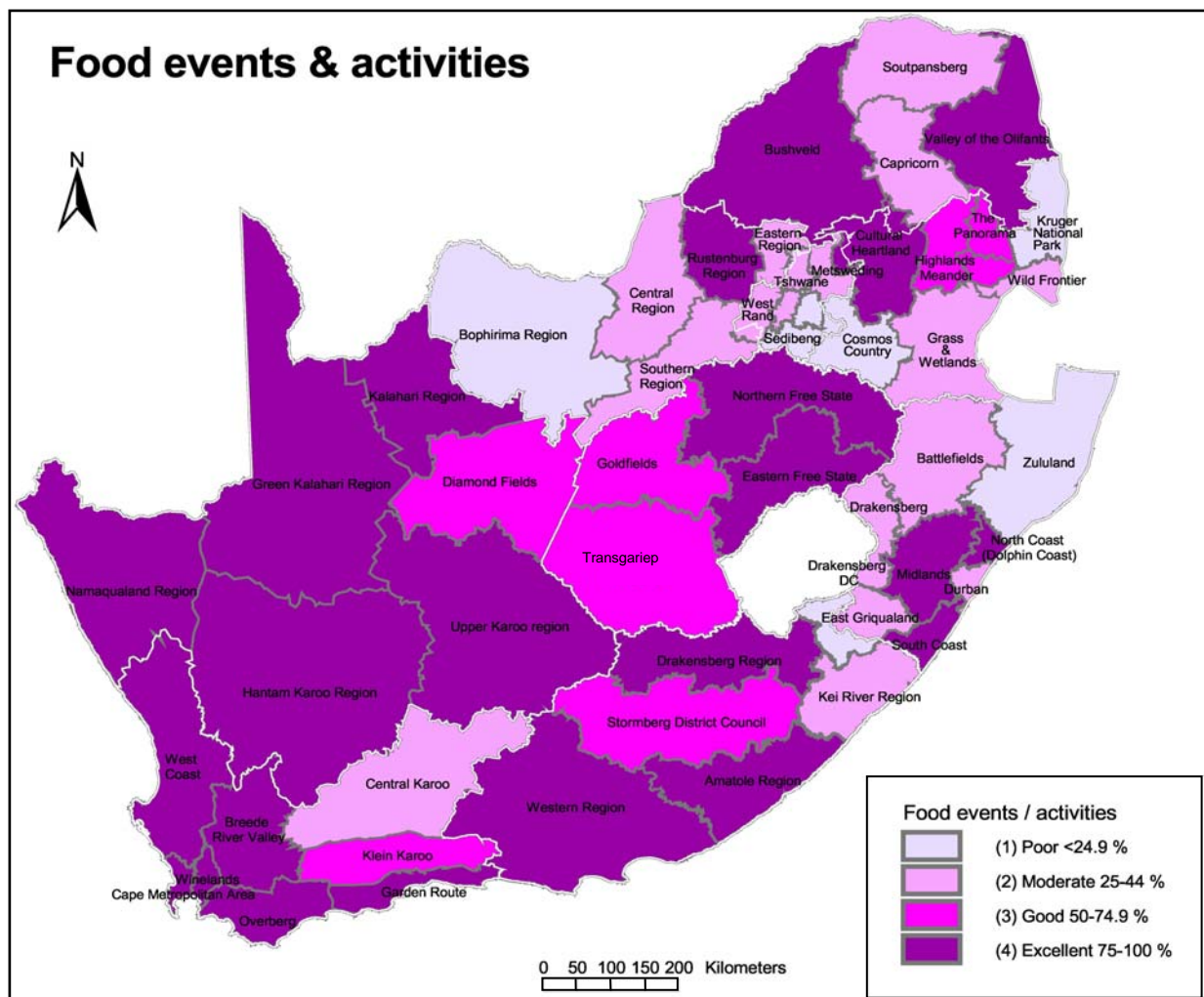


Figure 6.26: The presence and concentration of food events and activities in the tourism regions of South Africa

There are, however, regions where food events and activities ought to be better established because of the availability of resources such as local foods in the Cosmos Country region. Nevertheless, the availability of resources and/or the presence of attractions or events is

dependent on a myriad of requirements such as, *inter alia*, accessibility, amenities and the attractions on offer.

The chart (Figure 6.27) reflects the percentage breakdown of the food events and activities present in each province. It is noteworthy that a variety of food events and activities are present in all the provinces. Shows focusing on food are not present in all the provinces and in certain provinces this activity could be better developed, especially where local food products are produced. Shows afford the opportunity to showcase the local and regional resources of a destination and promote the produce as part of the tourism offering at the destination. Likewise the visibility of the local produce can create awareness for food establishments to know what is available locally, thereby enhancing the possibility of incorporating these products in menus and the provision of local food.

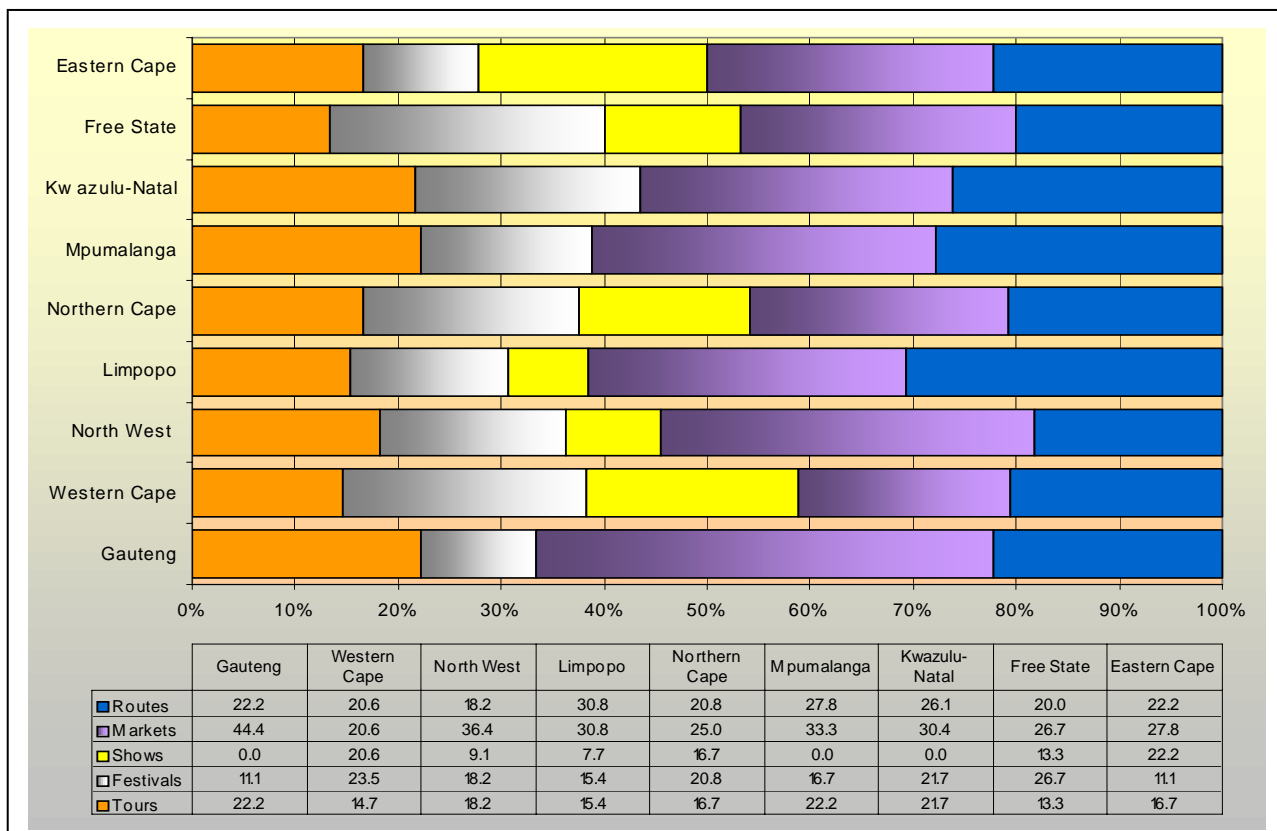


Figure 6.27: The percentage distribution of food events and activities within the provinces

6.7 SITUATIONAL ANALYSIS OUTCOMES

6.7.1 Dimensions of the situation analysis

Figure 6.28 is a visual representation of the dimensions of the situational analysis. The situational analysis executed in this study utilized an electronic database, ENPAT and TOURPAT to provide a large component of the information regarding the environmental analysis.

A thorough in-depth analysis of macro-environmental factors was not performed for this study, as much of this information is part of the strategic analysis performed by DMOs for the destination at large. An audit was performed for certain parts of the information required for both the external and internal analyses. A variety of data sources both primary information (the Stakeholder Survey and the Expert Opinion Survey) and secondary information (TOURPAT and FOODPAT) were utilized for gathering the required information.

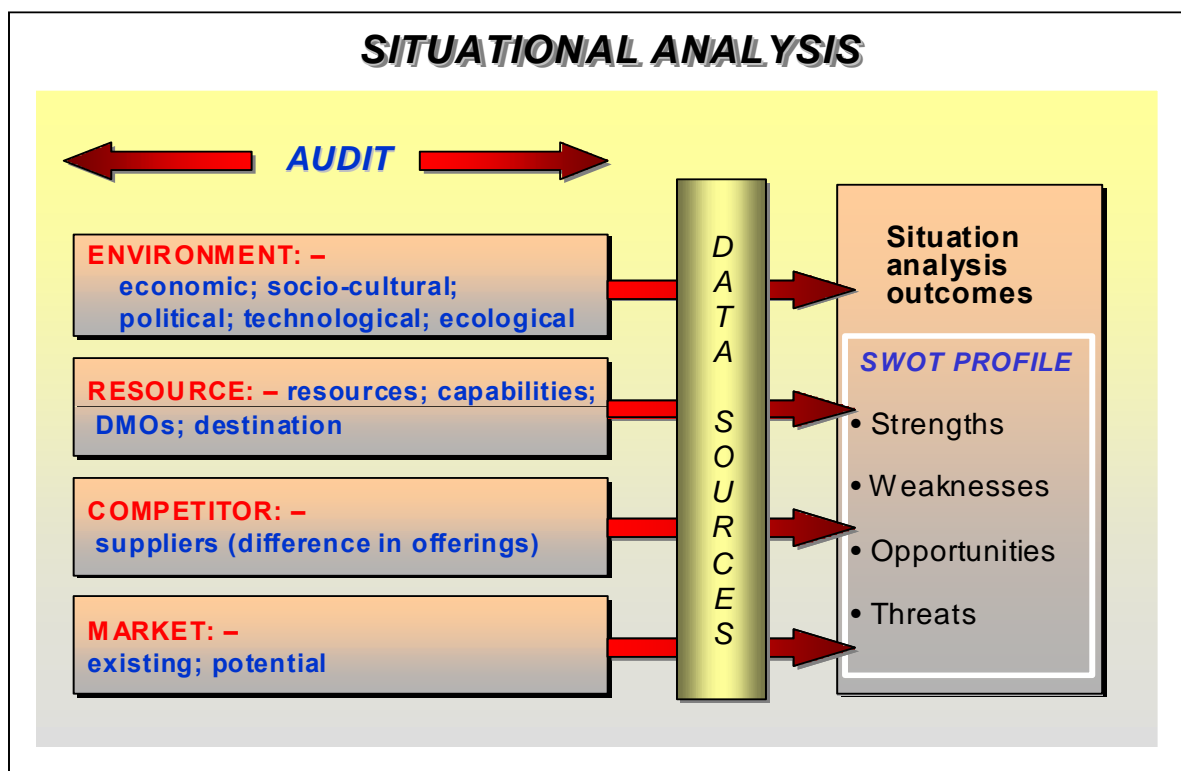


Figure 6.28: Dimensions of the Situation Analysis (adapted from (Tourism Recreation Research and Education Centre, 2003)

The situational analysis (Figure 6.28) involved the analysis of the environment, assessment of the availability and utilisation of resources at a destination, the competitors/stakeholders and the food tourism offerings, and the existing and potential markets with regard to food

tourism as an attraction. This information was sourced from various databases as previously reported in this chapter. The results have been collated and are presented as the outcomes of the situational analysis, which facilitated the compilation of the SWOT profile where most of the information was organised and presented in a more structured fashion for easier understanding and interpretation of the situation. This process allowed for the development of guidelines and focused recommendations.

As stated previously, the three datasets were integrated to clarify the status of food tourism in South Africa, more specifically as it relates to the use of local and regional food as a tool in destination marketing.

A map (Figure 6.29) provides a spatial analysis of the presence of food products (A), food attractions (B) and food events (C), which have been combined as overlays to present a total spatial analysis of the environmental resources and food tourism offerings on a regional,

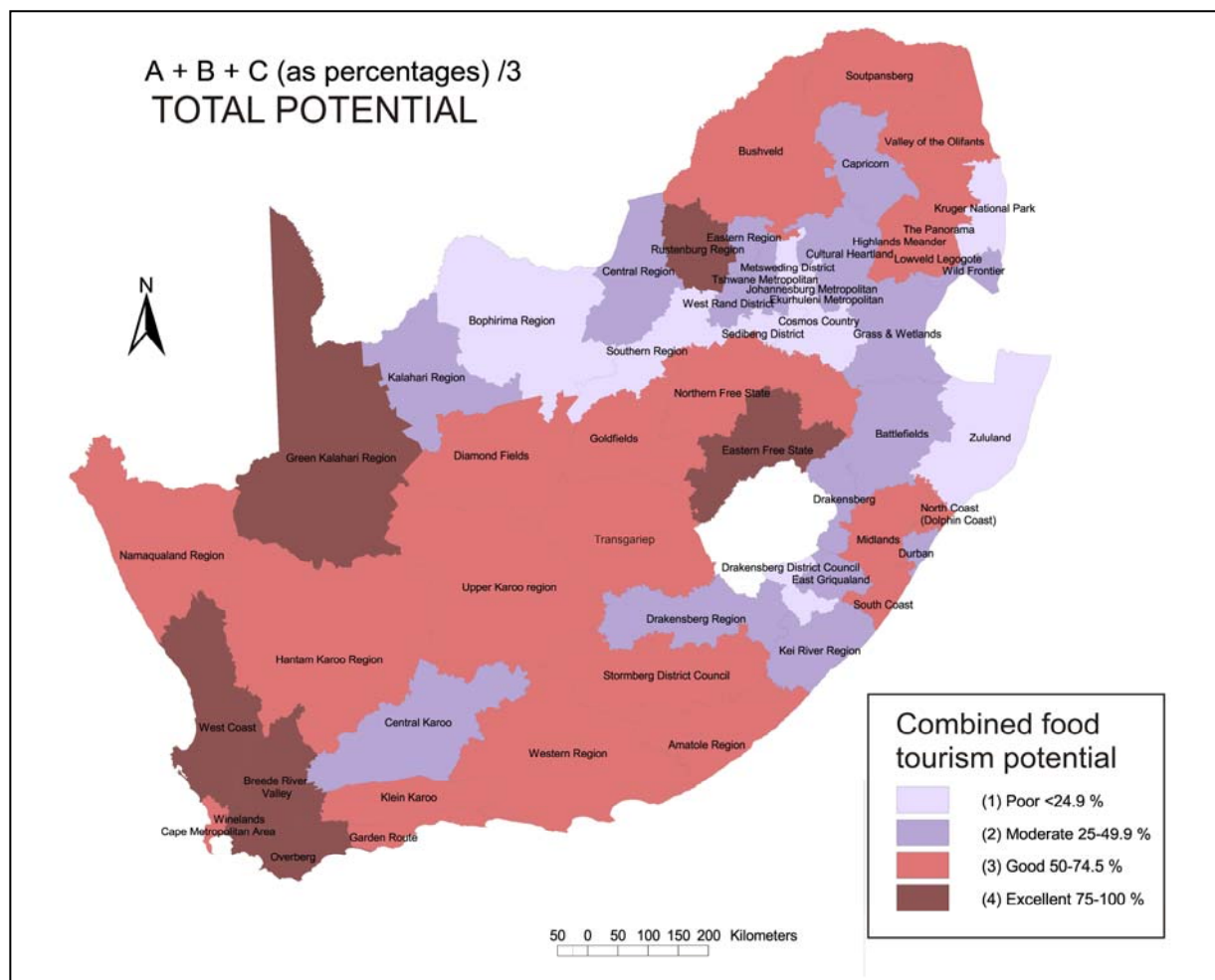


Figure 6.29: Spatial analysis and presentation of the total potential for food tourism in South Africa

provincial and national level. The total potential was calculated by adding the percentages of A + B + C and dividing the total by three. The total potential was classified in percentage ranges and equated with a value ranging from one to four as indicated in Figure 6.29.

From the information thus gained, it can be concluded that selected tourism regions, namely the West Coast, Breede Rivier Valley, Winelands, Overberg, Green Kalahari, Eastern Free State and the Rustenburg regions all possess potential for food tourism regarding the food products, attractions and events that are offered and available in the regions. A large part of South Africa is in a good position to offer and implement food tourism, with a relatively small part of the country having moderate or poor potential regarding food tourism development and implementation. The compilation of information from FOODPAT provides a DMO with substantial spatial evidence of whether food tourism would be a feasible option regarding the development of food tourism as an attraction at a specific destination. The information compiled from the FOODPAT database functions as a supportive tool in strategic planning and by no means presupposes a comprehensive and complete assessment of the resources in the region.

The development of food tourism as an attraction must be considered in conjunction with other existing attractions and the viability of incorporating food on-theming as a promotional tool.

The results of the analysis of questionnaire responses and opinions of experts were presented in Sections 6.4 and 6.5. The data from the various sources was collated and the outcomes of the situational analysis compiled. As stated in Chapter 5 the situational analysis consisted of two elements, the external and internal analysis, and comprised a number of steps as outlined and discussed in Section 5.2.3.

The outcomes of the situational analysis are discussed according to the external and internal analysis as presented in Figure 6.1 and the results will be referred to as discussed in the previous sections of Chapter 6.

6.7.2 External Analysis: Environmental analysis: opportunities and threats

As mentioned in Chapter 5 Section 5.2.3.4, an in-depth environmental analysis was not performed. However, much of the information required for the environmental analysis was

available from existing databases such as ENPAT and TOURPAT and other information pertaining to the environmental analysis was gained from the DMO questionnaires and opinions from experts. The discussion of the environmental analysis pertains very specifically to food tourism and may therefore be limited. The contribution of the extensive literature study and identification of the best practice also contributed to certain assumptions regarding components of the situational analysis, especially in areas where the components were not measurable. The implications of information regarding the external analysis were identified and will be placed in perspective when developing the guidelines and proposed recommendations that will be discussed in Chapter 9.

6.7.2.1 *Macro-environmental factors*

A summary of the role of macro-environmental factors in the external analysis pertaining to food tourism at destinations is presented as Table 6.8.

Table 6.8: Macro-environmental analysis pertaining to food tourism

FACTORS	TRENDS	IMPLICATIONS
ECONOMIC <ul style="list-style-type: none"> Funding Exporting income 	<ul style="list-style-type: none"> Due to restrictive budgets food tourism not regarded as a priority 	<ul style="list-style-type: none"> Less development and marketing actions; opportunity to optimise tourism lost
POLITICAL <ul style="list-style-type: none"> Laws/regulations 	<ul style="list-style-type: none"> Export laws/regulations pertaining to food products 	<ul style="list-style-type: none"> Laws restrict the free use of local food products Safeguard food supplies
TECHNOLOGICAL <ul style="list-style-type: none"> Communication media 	<ul style="list-style-type: none"> World Wide Web Electronic communications 	<ul style="list-style-type: none"> Changed marketing approach Globalisation of attractions
SOCIO-CULTURAL <ul style="list-style-type: none"> Trends Media impact 	<ul style="list-style-type: none"> Changed focus – cultural/heritage tourism Specialisation 	<ul style="list-style-type: none"> Increased interest in culture – includes cuisines Niche markets – food tourism
ECOLOGICAL <ul style="list-style-type: none"> Environmental awareness 	<ul style="list-style-type: none"> Sustainability – global awareness/priority Eco-tourism 	<ul style="list-style-type: none"> Sustainable competitiveness Use of local /regional foods – renewable resource

Economic factors refer mainly to the availability of funds for the offering of food tourism at a destination. Insufficient funds were not regarded as one of the main reasons for not offering food tourism at a destination. Lack of funds was, however, identified as one of the major gaps that placed a constraint on the promotion of food tourism. The strategy to increase the availability of sufficient funds to develop and promote food tourism was regarded as an issue of utmost importance and not merely one to be addressed only by the action of identifying sponsors or sourcing funding. The situation regarding the economic factors as reported here, was echoed by the experts in the field of food tourism who voiced concern that stakeholders did not have sufficient funds for developing and implementing food

tourism at the level required by present global tourism trends. The economic advantage food tourism in South Africa has in comparison with other destinations, is that our food is relatively cheap and affordable to many international tourists. This aspect can be considered as a food tourism enhancer.

Political / regulatory factors regarding food tourism referred mainly to laws and policies preventing the commercial utilisation of certain products such as seafood. This was, however, a very localised restraint and did not affect the country as a whole.

Technology factors focused mainly on the use of media and media coverage to promote food tourism at a destination. The marketing tools used included mainly the use of television and media coverage and web promotion to a lesser extent. Media coverage was regarded as a promotional gap and constraint. The opinion of the experts was that the web was not used sufficiently and that food tourism could benefit from the advances in technology, which would have a far-reaching positive effect on tourism as a whole.

Social changes and food tourism focused on the trends in the socio-cultural environment and more specifically on new tastes and the resultant behavioural shifts that they initiated. The influence of social change was more difficult to determine directly, but for the purpose of this study was indicated by the:

- position of food tourism as an attraction at the national, provincial and regional levels; and
- type of media used as a promotional tool.

Literature provided sufficient evidence of new trends that have affected tourism and influenced the popularity of food tourism (Boniface, 2003; Boyne, Hall & Williams, 2003; Hall *et al.*, 2003; Hjalager & Richards, 2002; Long, 2003; Macdonald, 2001; Richards, 2002; Wagner, 2001). Although the growth in food tourism was not measured in this study the relative position of food tourism in relation to other attractions was determined as discussed in Section 6.3.1.

The impact of the media such as promoting celebrity chefs; global coverage; broadcast and printed media all contributed to providing a global image of food and contributed to the growth in food tourism (Riege & Perry, 2000; Rita, 2002; Roberts & Hall, 2004; Selwood, 2003; Sparks *et al.*, 2001; van Westering, Poria & Liapis, 2000). The increase of cultural tourism and its impact on food tourism in which food epitomises the culture of a country's

people, was also important as was the development of new tastes and trends seen as reflecting globalisation and initiating localisation (Burnett, 2000; Dunbar-Hall, 2001; Government of South Africa, 1996; Long, 1998; Ohlsson, 2000; Stebbins, 1997; van Westering *et al.*, 2000). The use of food as a marketing and promotional tool by DMOs was established and the type of marketing activities and tools was determined and discussed in Section 6.4.1

Ecological factors affect and are affected by tourism and food tourism is no exception. (Heath, 2002) One of the outcomes of this study was to determine how food tourism could enhance the sustainable competitiveness of the destination particularly if based on the use of local and regional foods. However, the production of food was regarded as a renewable resource which could stimulate entrepreneurship and enhance the growth of local industries. The determination of ecological factors occurred indirectly by determining the use of local food products and noting the establishment of new business opportunities. Being aware of the lack of opportunities available to marginalised communities as expressed by the experts interviewed further highlighted this notion. As discussed in Section 6.3.2 local and/or regionally produced food products and speciality restaurants of the area were the most strongly represented component of food tourism. The ecological challenge lies in the production of these products, which must be generated within the framework of sustainability and maintaining the natural resources of the environment.

6.7.2.2 Existing/potential markets

Customers/consumers. Tourists who selected food tourism as an attraction and supported it as an activity was determined only in the case study. However, the fact that all tourists eat and the amount of money generally spent on food and meals by both local and international tourists was a good enough indication of the importance of food as an attraction as discussed in Section 6.4.4.

Market trends were assessed as indicated by the increased interest shown by tourists in food and the growth of information in popular literature regarding the issues of food tourism. These trends are further supported by the academic literature and other initiatives surrounding the development of food tourism and as highlighted in the discussion on best practice. The assumption can be made that the market for the development and implementation of food tourism is growing and that a similar trend is being experienced in South Africa albeit at a slower rate and on a smaller more regionalised scale.

Routes were identified as a key component of food tourism and were receiving considerable more attention, as discussed in Section 6.3.2. The existing wine routes in South

Africa have created an opportunity for food to be on-themed and developed in a seamless destination experience. Both existing and potential markets for routes offer great opportunities as the infrastructure is already in place although it often needs to be incorporated into activities in which food is offered as an attraction.

6.7.2.3 Key competitors

Suppliers of food tourism globally were identified in the best practice analysis and also indicated by the experts. Locally, the DMOs were identified as the facilitators of food tourism as their role could include the development and implementation of food tourism in a destination by providing the strategic infrastructure. The various stakeholders such as restaurateurs, tour operators and people involved with running guesthouses, wineries, hotels, and so forth were the actual suppliers of the food tourism product but they required the support and infrastructure of the DMOs to fulfil this role. Since this study focused on the DMOs, they were regarded as the facilitators and promoters for food tourism.

Partners were the other tourism and non-tourism organisations also involved in offering of food tourism. In South Africa these organisations are SACA (South African Chefs Association), and FEDHASA (The Federated Hospitality Association of South Africa) that plan and promote specific events such as the Cape Gourmet Festival, the Department of Foreign Affairs, the South African Wine Association, South African Tourism and the media. The experts named these organisations but the general feeling was that the DMOs did not promote food tourism sufficiently. This could be as a result of a restrictive budget or insufficient funds and that the other partners could do much more by focused on local products, local talent and the promotion of food as an attraction which could generate additional funds. The main constraint identified was the lack of networking and often the identification of partners to enhance the development and implementation of food tourism.

6.7.3 Internal Analysis: Resource analysis: strengths and weaknesses

The internal analysis or resource analysis gave an indication of the strengths and weaknesses of a destination and covered the aspects to be discussed in subsequent sections. Certain of these have already been dealt with in preceding sections and will only be referred to, others will be partially illustrated focusing only on the Western Cape, as the data for this Province was the most complete since all the tourism regions in this province responded to the survey.

6.7.3.1 Attractions

The assessment of **all tourism attractions** was undertaken in the stakeholder survey where the attractions of a destination were positioned (Section 6.3). **Wine** (Section 6.3.1) and **Food** (Section 6.3.2) as attractions were assessed. The presence of local and regional food products could enhance and facilitate the position of food as an attraction. The information regarding the various food products and the variety of food attractions present in a destination was compiled as Section A: Food Information and B: Food Attractions in FOODPAT and portrayed in Annexure 9. The type of activity provided in a destination could also be influenced by the availability of resources.

6.7.3.2 Accessibility

The information extracted from the ENPAT/TOURPAT database (Annexure 3) was used to determine the accessibility of the various regions to food tourism opportunities. Accessibility according to Heath (2002:69) *relates to the facilitation of movement within a destination and the location factors contributing to the success of its component attractions*. The information indicating accessibility was compiled from the presence of existing routes and infrastructure and was indicated by the presence of towns; roads and railroads; airports; tourism regions; DMO offices; main tourism attractions; destinations with high tourism attraction and existing tourism routes. Existing **routes** and **infrastructure** for the Western Cape are indicated in Figure 6.30.

The presence of a variety of existing tourism routes in the Western Cape, provided sufficient potential for the development and implementation of food tourism, as food tourism could be on-themed to the already existing tourism routes and attractions such as Route 66. Similar accessibility analyses could be performed for all the other provinces, should the need arise.

6.7.3.3 Amenities

The amenities included in this study focused mainly on the presence and variety of **restaurants and other facilities offering food tourism related services**. The information for this was extracted from Section B: Food Attractions in FOODPAT and included in this thesis as Annexure 9. A map (Figure 6.31) shows the nature of the various types of restaurants and other eating-places in the Western Cape, as well as the presence of fish as a local food product. Product availability could influence the type of restaurant found in a specific region. A similar analysis could be performed for all the tourism regions, also comparing different available food products with the type of restaurant present in a destination.

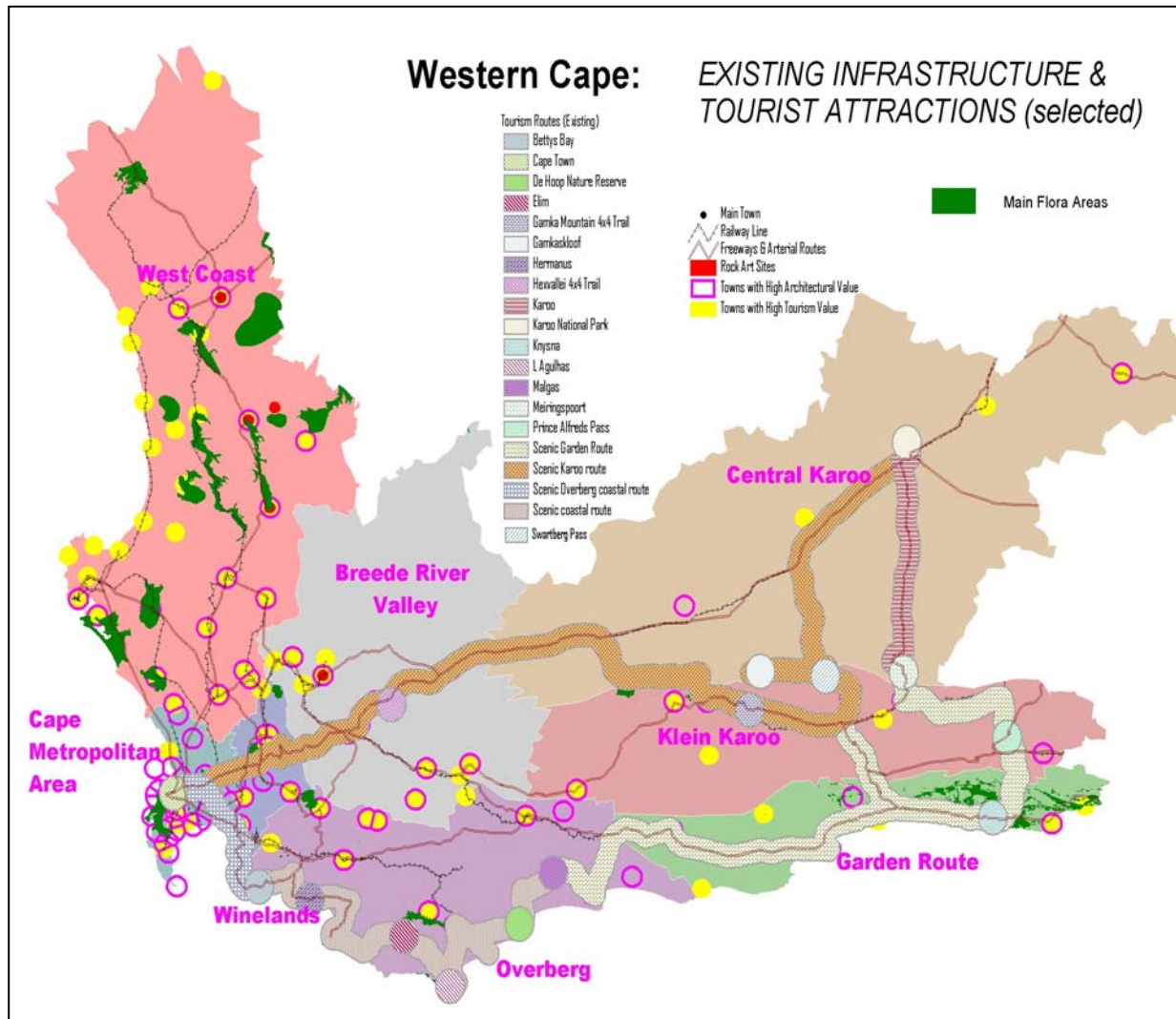


Figure 6.30: Routes, selected infrastructure and tourist attractions in the Western Cape

6.7.3.4 Activities

A record was made of available activities that focused primarily on food tourism but not exclusively on food *per se* as many facilities at tourists destinations offer food in one form or another. The activities for this study focused on **tours; festivals; shows; markets and routes**. The information regarding all available activities is available on the FOODPAT database.

The assessment of the various activities regarding food tourism for all the provinces was presented and discussed in Section 6.4. Figure 6.32 portrays the number of events focusing on festivals and the different types of shows offered in the Western Cape. Similar analyses can be performed for the other types of activities and for all the other provinces. It is clear that the number of festivals held are located in specific regions within the Western Cape and

the majority of shows held are agricultural, with limited focus on only cuisine. This is feasible as events such as these provide the ideal opportunity to combine products, activities and attractions.

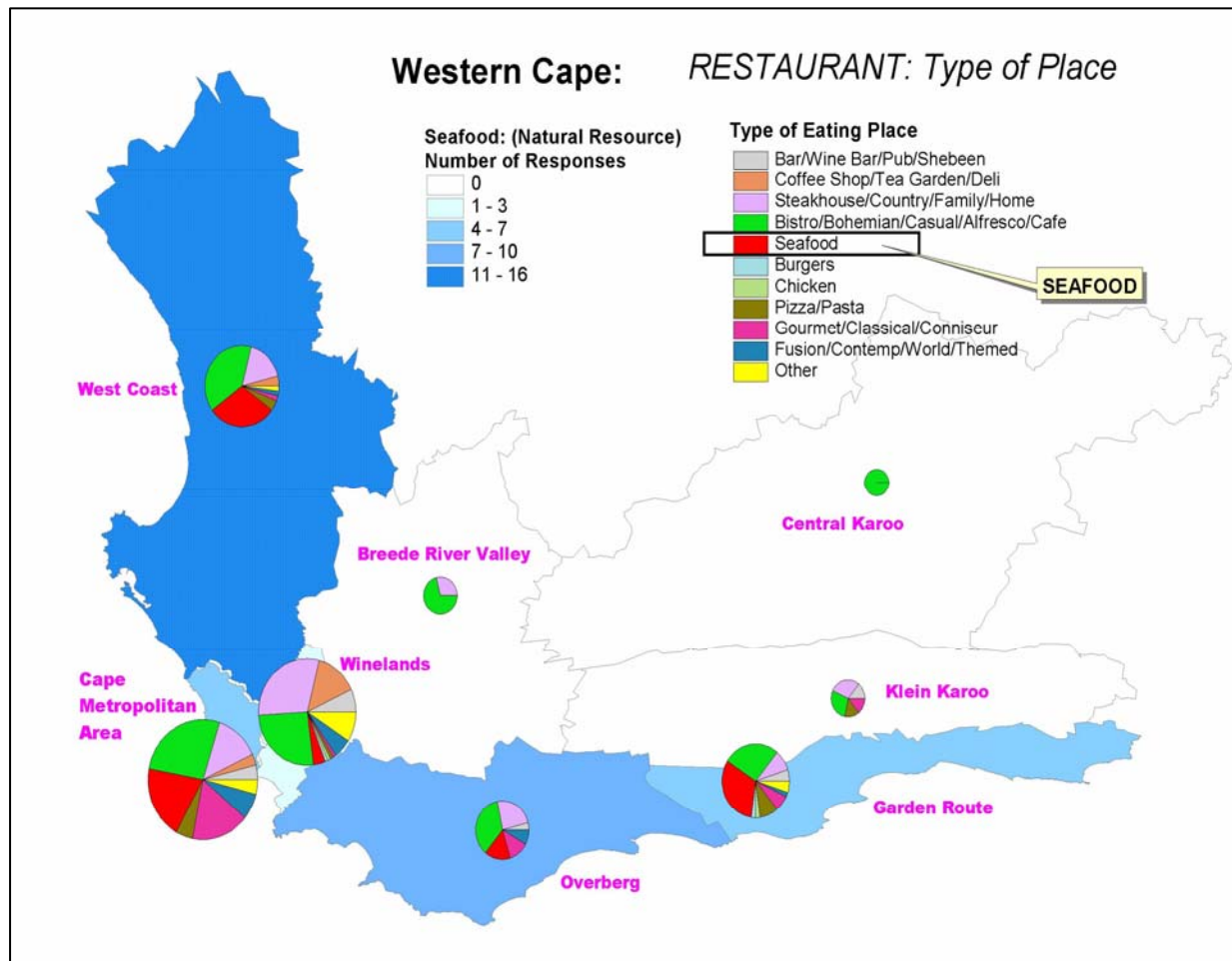


Figure 6.31: The presence and variety of restaurants in the Western Cape

6.7.3.5 Ancillary services

The ancillary services for this study were classed as **communication**, which was not assessed but it was assumed that the **presence of DMOs** in the various regions meant that there were channels for the flow of information about the destination for the tourist.

6.7.3.6 Attitude

An investigation in to the **Hospitality** function of tourism was not included in this study. However, the lack of constant high levels of service was mentioned in the expert opinion survey. It was recommended by respondents that hospitality was an important matter and needed to be addressed. The suggestion was also made that it be incorporated in training

programmes. Having the right attitude in dealing with tourists would create a comfortable experience for them and foster a desire for a return visit.

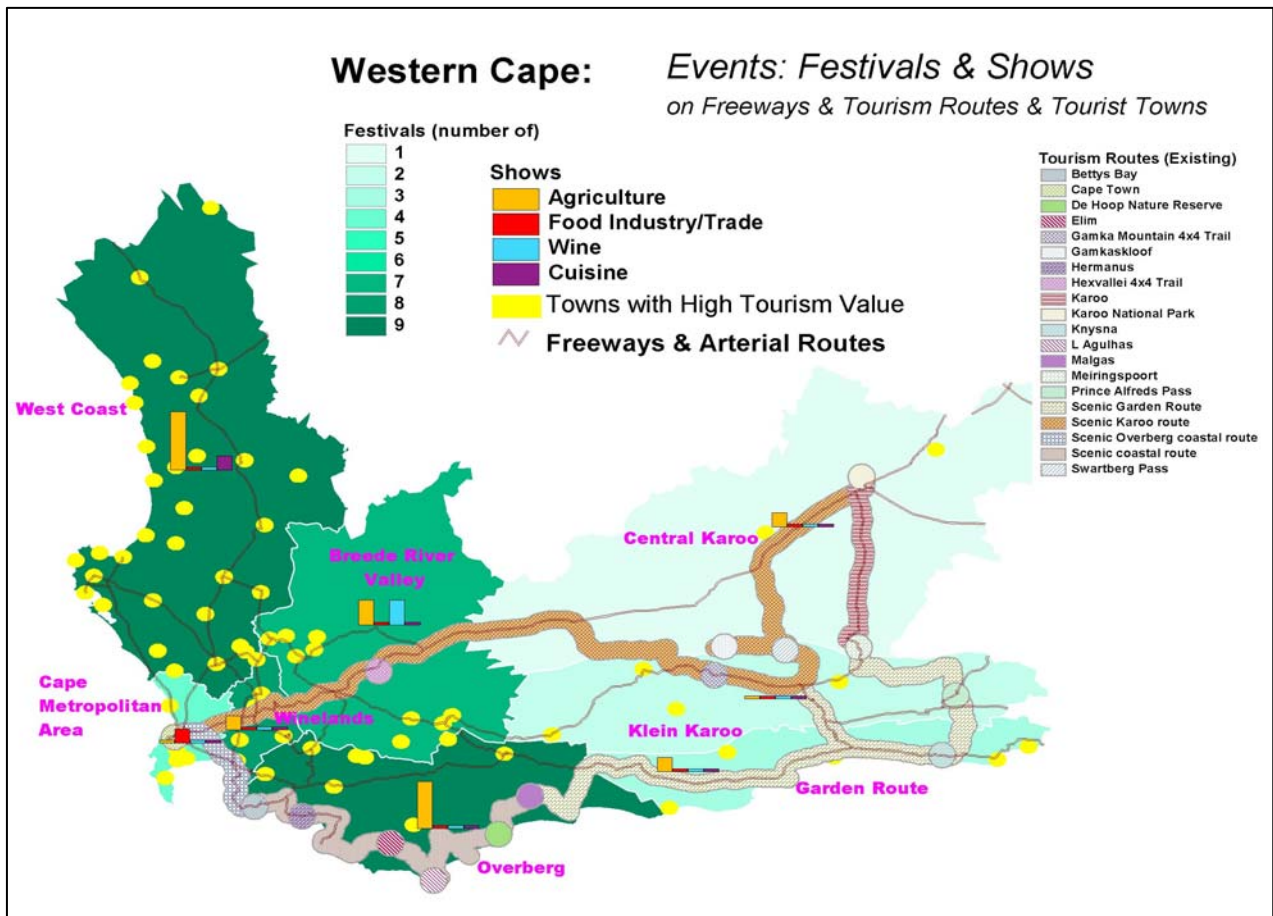


Figure 6.32: Map portraying events such as festivals and shows in the Western Cape

6.7.3.7 Available packages

Culinary tours were included in the activities provided at the destination regarding tourism and have been assessed and discussed in Section 3.2.1. It was also highlighted in the section on best practice in Chapter 3.

6.8 SWOT PROFILE

The culmination of the analyses of the various datasets was finally compiled in the SWOT profile and presented in Figure 6.33.

INTERNAL	
Strengths	Weaknesses
Attractions	
<ol style="list-style-type: none"> 1. Food tourism – supportive attraction in all provinces 2. Cultural/historical second highest key attraction – culinary heritage – can be utilised as cultural component 3. Established wine industry in certain or the tourism regions 4. Good mix of products, services and attractions for food tourism development 	<ol style="list-style-type: none"> 1. Food tourism not regarded as key attraction 2. Networking and lack of partnerships 3. Lack of a definite food tourism strategy 4. Many existing food tourism resources under-utilised 5. Low level of knowledge regarding culinary heritage and food as marketing tool
Accessibility	
<ol style="list-style-type: none"> 1. Existing tourism routes 2. Major routes, secondary and tertiary roads present 	<ol style="list-style-type: none"> 1. Lack of appropriate signage
Amenities	
<ol style="list-style-type: none"> 1. Availability of food/culinary services and facilities 2. DMO offices available on national, regional and local level 	<ol style="list-style-type: none"> 1. Networking and lack of partnerships 2. Inconsistent level of service 3. Inconsistent product quality 4. Resources under-utilised
Activities	
<ol style="list-style-type: none"> 1. Food tourism related events growing 2. Individual stakeholders providing food tourism related activities 	<ol style="list-style-type: none"> 1. Lack of marketing and promotion of food tourism related activities
Ancillary services	
<ol style="list-style-type: none"> 1. Availability of services 	<ol style="list-style-type: none"> 1. Inconsistent level of service
Attitude	
<ol style="list-style-type: none"> 1. Availability of local products 2. Existing routes 3. Established wine industry 4. Good mix of products, services and attractions 5. Positive food tourism attraction status 	<ol style="list-style-type: none"> 1. Lack of appropriate signage 2. Networking and lack of partnerships 3. Inconsistent level of service 4. Inconsistent product quality 5. Lack of a definite food tourism strategy 6. Many existing resources under-utilised
Available packages	
<ol style="list-style-type: none"> 1. Existing packages can include food tourism focus 	<ol style="list-style-type: none"> 1. Lack of co-operation to market packages including food tourism focus

Figure 6.33: The SWOT profile regarding the Situational Analysis for food tourism in South Africa (continues on next page)

EXTERNAL	
Opportunities	Threats
Economic	
<ol style="list-style-type: none"> 1. On-theming opportunities 2. Branding of local products 3. Marketing of local products, services and attractions 4. Further development and utilisation of local products services and attractions 5. Global competitiveness 	<ol style="list-style-type: none"> 1. Insufficient funds for developing food tourism 2. Unawareness of the potential of food tourism as a niche type of tourism
Political/Legal	
<ol style="list-style-type: none"> 1. Further development and utilisation of local products services and attractions 	<ol style="list-style-type: none"> 1. Legislation determining the use of local products and the employment of specialists 2. Safety and security regarding crime in SA
Technology	
<ol style="list-style-type: none"> 1. Marketing of local products, services and attractions 2. Further development and utilisation of local products services and attractions 3. New technology WWW 	<ol style="list-style-type: none"> 1. Insufficient funds for developing food tourism
Socio-cultural	
<ol style="list-style-type: none"> 1. Development of cuisine as a cultural tourism product – cultural tourism 	<ol style="list-style-type: none"> 1. Unawareness of the potential of food tourism as a niche type of tourism
Environmental	
<ol style="list-style-type: none"> 1. Prioritising food tourism as a sustainable competitive attraction 	<ol style="list-style-type: none"> 1. Insufficient funds for developing food tourism 2. Legislation determining the use of local products and the employment of specialists 3. Unavailability of local products
Industry Trends / Markets	
<ol style="list-style-type: none"> 1. On-theming opportunities 2. Branding of local products 3. Marketing of local products, services and attractions 4. Further development and utilisation of local products services and attractions 5. Improve level of service by focusing on training 6. Prioritising food tourism as a sustainable competitive attraction – latest trend 7. SA favourite destination 	<ol style="list-style-type: none"> 1. Insufficient funds for developing food tourism 2. SA in competition with other destinations e.g. Australia, Canada

Figure 6.33: The SWOT profile regarding the Situational Analysis for Food Tourism in South Africa (continued)

6.9 THE EVALUATION OF FOOD TOURISM DESTINATION MARKETING

As discussed in Chapter 4 the food tourism destination marketing framework was organised in three **key areas of contribution** (Figure 4.3). This conceptual framework served as model for the evaluation of the data. The areas of contribution and identifying the food tourism enhancers are tabulated (Table 6.8) and used to evaluate the data collated from the three datasets. This evaluation is the final assessment of the data following on from the situational analysis and the development of the SWOT profile. The purpose it serves is to contextualise the collated data within the framework of food tourism destination marketing and thus to reflect on the competitiveness and sustainability of the use of local and regional foods as a marketing tool in destination marketing.

The contribution of food tourism enhancers to destination competitiveness and sustainability (Table 6.9) comprised the following and are indicated with a and printed in **blue**:

- In the **Foundations framework area** regarding **Destination Policy Planning and Development** food tourism only contributed in three of the six areas to competitiveness and sustainability, as it was only part of the policy formulation in selected regions such as in the Western Cape. The presence of food tourism as an attraction did stimulate the development of natural and human resources. With regard to **supporting factors and resources, the enablers**, food tourism only contributed in the areas of accessibility and the development or stimulation of new developments.
- In the **Focusing on framework area**, which is regarded as the key focus area of food tourism concerning destination marketing and management activities and core resources and attractors, food tourism experiences could be enhanced by both the activities and the resources available. The areas where food tourism was not enhanced was due to the lack of successful networking and the establishment of partnerships. The development of food tourism as an attraction was retarded by insufficient information and the absence of a relevant national strategy.
- In the **Capitalizing on Framework Area**, food tourism experiences could be enhanced by all the qualifying and amplifying determinants.

Within the framework of destination marketing food tourism enhancers have the potential to contribute to the competitiveness and sustainability of a destination. The areas where food tourism enhancers are not being realised reflects the need for a well-formulated strategy and other enablers.

Table 6.9: Assessment of the contribution of food tourism enhancers to destination competitiveness and sustainability

CONTRIBUTION OF FOOD TOURISM (FT) ENHANCERS TO DESTINATION COMPETITIVENESS AND SUSTAINABILITY	
FRAMEWORK AREA: FOUNDATIONS	
Destination Policy Planning and Development	FOOD TOURISM ENHANCERS
<ul style="list-style-type: none"> • System definition • Philosophy / Values • Vision • Development • Human resource development • Finance and venture capital • Visitor management • Resource stewardship • Crisis Management 	<ul style="list-style-type: none"> • FT part of policy formulation of destination • FT accentuates cultural importance in destination • FT included in vision statement of destination • FT stimulates development of resources • FT stimulates development of human resources • FT stimulated by finance & venture capital allocation • FT contributes to matching supply & demand • FT enhances resource stewardship development • Food & beverage facilities component of crisis management strategy
<ul style="list-style-type: none"> • Infrastructure • Accessibility • Facilitating resources • Hospitality • Enterprise • Political will 	<ul style="list-style-type: none"> • Proper signage will facilitate FT • Accessibility required for FT • Knowledge regarding local foods / cuisine will be accessible / available • Required to facilitate & enable FT • FT will stimulate / require new venture development • A positive attitude and commitment will promote FT
FRAMEWORK AREA: FOCUSING	
Destination Marketing and Management	FOOD TOURISM ENHANCERS
<ul style="list-style-type: none"> • Organisation • Marketing • Quality of service / experience • Competitive / Collaborative analysis • Monitoring and evaluation • Information / Research • Positioning / branding / Image • Audit 	<ul style="list-style-type: none"> • FT can be included in organisational functions • FT a niche market product important in marketing • FT can enhance quality of service / experience • Formation of partnerships between DMOs / regions • Possible as result of FT database • Development of database with accessible information • FT as key / supportive attraction / specific product • Evaluating FT potential
Core Resources and Attractors	FOOD TOURISM ENHANCERS
<ul style="list-style-type: none"> • Physiography & climate • Culture & history • Mix of activities • Special events • Entertainment • Super-structure • Market ties 	<ul style="list-style-type: none"> • Agricultural linkages / local food products • Culinary heritage / local pride / food attractions • 'On-theme' activities (routes/ festivals/ events/ tours) • Food shows (gourmet festivals/ food activities) • Cultural villages • Additional services that facilitate FT • Capitalising on linkages with people on origin markets
FRAMEWORK AREA: CAPITALISING	
Qualifying and Amplifying Determinants	FOOD TOURISM ENHANCERS
<ul style="list-style-type: none"> • Location • Interdependencies • Safety / security • Cost / value 	<ul style="list-style-type: none"> • Specific FT product linking destinations and tourism markets (wine/ wild-life/ routes/ themes) • 'On-theming' linking to other types of tourism (wine/ heritage & cultural/ health/ routing) • Food safety/ hygiene/ high sanitary standards • Comparative cost/ values for money in comparison to other international destinations

☑ = indicates the contribution of food tourism enhancers to destination competitiveness

To provide a complete picture of food tourism in South Africa, it is necessary to present its comparative and competitive advantages that results from the availability and utilisation of resources at a destination. The comparative advantage comprises the resources that naturally make a destination attractive to tourists, and include the culture and the existing infrastructure of a destination (Ritchie & Crouch, 2003). According to the results from the stakeholder survey, South Africa was regarded as a key destination first, as far as natural attractions were concerned, with outdoor/recreation attractions second and culture/historical attractions third. Food as an attraction is not considered as an important key attraction, but fared well as a secondary attraction. In South Africa, food and culture come together in food tourism and will be a comparative advantage as the country has resources that make the country naturally attractive to visitors.

Competitive advantages relate to a destination's ability to use these resources effectively over the long-term (Ritchie & Crouch, 2003). The effective use of available resources to develop and implement food tourism has been maximised to reach its full potential as can be seen from the results reported in FOODPAT and the stakeholder and expert opinion surveys. There are regions within South Africa that have sufficient resources to successfully offer food tourism as a supportive attraction. The reasons for food tourism not featuring as an attraction at national level (Figure 6.7) were that the stakeholders were unaware of the tourism potential of food and were ill-informed about the promotion of food tourism. The need for a strategic approach to food tourism as an attraction in destination marketing is imperative for sustainable competitiveness at a destination and can only be achieved by the development and implementation of an appropriate marketing strategy, incorporating the co-operation and support of all stakeholders at the destination.

The overall assessment of food tourism in South Africa and the contribution of all key areas to the enhancement of food tourism provided the view that generally food tourism experiences could be enhanced by the focusing and capitalising framework areas and to a lesser extent in the foundations framework area. This compares well with the global position of food tourism, where the main hurdles lie in the destination policy planning and development areas and, in addition, a lack of effective enablers. The contribution of food tourism enhancers to destination competitiveness and sustainability is clear, and definite, as food tourism contributes in all areas of the destination competitiveness framework. The area where food tourism enhancement is lacking is a result of insufficient knowledge, low prioritising and few resources. None of these actions or resources that are lacking should deter the development and implementation of food tourism at a destination. The

development of a focused strategy could alleviate the present shortcomings and assist with the planning and development of food tourism at a destination.

6.10 CONCLUSION

Chapter 6 dealt with the results and data analysis of both the quantitative and qualitative components of the study. The profile of the respondents was presented first, followed by the descriptive analysis of the results of the stakeholder survey and the results of the expert opinion survey. Thereafter the results of FOODPAT were both statistically and spatially offered. The situational analysis outcomes and the SWOT profile were highlighted. Finally the contribution of the food tourism enhancers to destination competitiveness and sustainability were identified within the framework of destination marketing. The results of the three different datasets, TOURPAT, FOODPAT and the stakeholder and expert opinion surveys were collated and contributed to verifying and refining the data collected, thus contributing to the reliability and validity of the research results.

As reflected in the results it was found that local and regional food is not being used to its full potential to market and promote food tourism in many of the tourism regions of South Africa. The potential for food tourism exists; South Africa has many of the necessary resources to develop and implement food tourism, but the importance of food tourism as an attraction and the contribution that it can make to enhance the sustainable competitiveness of a destination has not been realised on a national level. The need for strategy development was reflected in the results and verified by the expert opinions.

Chapter 7 provides the description of the development of the Strategic Food Tourism Destination Marketing Framework that was constructed from the findings of this study.

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Strategic Food Tourism Destination Marketing Framework

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7.1 INTRODUCTION

The development and compilation of the Strategic Food Tourism Destination Marketing Framework for optimal and responsible inclusion of food tourism in destination marketing is dealt with in this chapter. The methods and results presented in Chapters 5 and 6 were integrated and holistically presented to prepare for the application of the tools and procedures utilised to perform a strategic evaluation of the food tourism potential at a destination. The steps of the Strategic Food Tourism Destination Marketing Framework are explained in relation to the data from the situational analysis, expert opinion survey and tools that were developed as they contribute collectively to the fundamental approach adopted for establishing food tourism at a destination.

7.2 DEVELOPMENT AND COMPILATION OF THE STRATEGIC FOOD TOURISM DESTINATION MARKETING FRAMEWORK

The development of a comprehensive and integrated strategic approach to food tourism destination marketing was the ultimate goal of this study as motivated in Chapter 4. Essentially its function is to formulate guidelines for destination marketers and entrepreneurs to use now and in the future, in order to optimise the tourism potential of local and regional food in effective food tourism initiatives. Boyne *et al.* (2003) identify the need for such an approach to enable the stakeholders to co-operate and achieve the effective implementation of marketing strategies regarding food tourism. An outline of the process showing the interrelatedness of a sustainable and competitive destination, food tourism and destination marketing (Figure 4.1) was provided in Chapter 4.

The destination competitiveness and sustainability framework of Ritchie and Crouch (2003), together with other competitiveness models (Dwyer, 2001; Heath, 2003; Kim, 2001), were used as point of departure to contextualise the contribution of food tourism to the competitiveness and sustainability of a destination. Due to the fragmented nature of the tourism industry, it is necessary to utilise multidisciplinary tools and techniques to increase the reliability of assessment procedures by crosschecking information (Dunn & Hurdus, 2002) and converging data. Therefore various methodologies were applied and tools were developed, namely the culinary database, FOODPAT, TOURPAT and the Product Potential and Attractiveness Tool, to clarify and confirm the contribution of food tourism to destination marketing (Section 7.4.2). These methodologies and tools culminated in the Strategic Food Tourism Destination Marketing Framework, an approach that can be utilised to identify food

tourism enhancers thus contributing to the optimal and responsible development and marketing of food tourism in a destination⁶.

The development of the strategic approach to optimise the tourism potential of local and regional foods, so as to ensure sustainable competitiveness is outlined and discussed in the next section.

7.2.1 Synthesis and Verification of the Strategic Food Tourism Destination Marketing Framework

Figure 4.2 in Chapter 4 provided a visual portrayal of the procedure followed and the culmination of the final Strategic Food Tourism Destination Marketing Framework, which is discussed and explained in detail in the following sections. The strategic approach for developing and implementing food tourism, which is contextualised in the food tourism destination-marketing framework, is the outcome of the integration of primary and secondary data collected. The development of the Strategic Food Tourism Destination Marketing Framework constituted a dual focused procedure in phase two, of the methodology, the empirical research (Figure 5.1). First, the data on the evaluation and availability of the environment and resources, attractions and events as collated in FOODPAT and TOURPAT indicated the need for a strategic approach to facilitate the utilisation of available resources and existing activities that would provide a specific focus for the marketing initiatives. Second, the results from the DMO stakeholder survey and expert opinion interviews identified and further supported this finding as the results revealed clearly that food is not utilised to its full potential as an attraction and marketing tool in destination marketing.

Furthermore the presence of various gaps in marketing and food related issues in destination marketing as identified in the stakeholder and expert opinion surveys and evidence from the literature review, confirmed the merit of having such a strategic approach. DMOs and experts in the food tourism industry recommended specific actions and strategies, which also came to the fore in the best practice analysis. The strategies and actions required accentuated the importance of developing a focused marketing strategy and approach that included food tourism. Such an approach could facilitate the development of food tourism as an attraction at a destination. Moreover, destination competitiveness and sustainability

⁶ The information regarding the tools and techniques developed to contribute to the development and implementation of food tourism in destination marketing will be reiterated wherever relevant as an *essential* part of the discussion of each variable, phase or part of the model.

would also be enhanced by such actions and could result in the responsible utilisation of available resources and existing infrastructure.

The results and overall assessment of the status and position of food tourism in destination marketing, however, highlighted the need for appropriate tools to assist in the determination of the potential for food tourism at a destination. The Product Potential and Attractiveness Tool was therefore developed, supported by the food attractiveness audit and marketing assessment (7.4.5 and 7.4.6).

The integration of the results from the primary data sources (DMO stakeholder survey and the expert opinion survey) and the secondary data sources (FOODPAT and TOURPAT) provided the opportunity to compile the SWOT profile and ultimately the indication of the food tourism enhancers (Figure 5.1). The Strategic Food Tourism Destination Marketing Framework is therefore the culmination of these results. The ultimate potential for food tourism was established through application of the Product Potential and Attractiveness Tool for the Strategic Food Tourism Destination Marketing Framework and implemented in the execution of the case study.

The potential of local and regional food as a destination attraction or experience and marketing tool is thus verified. The Strategic Food Tourism Destination Marketing Framework encompasses a procedure, consisting of three major steps to be followed when developing and implementing food tourism at a destination and is explained in the following sections.

7.2.2 The Strategic Approach for Developing and Implementing Food Tourism at a Destination

Figure 7.1 presents the strategic approach for developing and implementing food tourism at a destination. The approach comprises three main steps: situational analysis, the strategic evaluation of food tourism potential and the execution of key marketing tasks each with their own actions that have to be effected.

Prior to step one initialising (Figure 7.1), the policies and strategies of the national, provincial and local tourism bodies need to be scrutinised for any information relevant to the development and implementation of food tourism at a destination. The importance of this procedure is the establishment of a baseline for assessment and to procure background information regarding the external and internal environments and for resource analysis,

marketing assessment, policy documents and strategic plans. Such information would contribute to the SWOT profile of the destination. Step one now follows and the situational analysis is executed entailing an evaluation of the environment, markets and resources and attractions at the destination. The destination's tourism attraction status is determined leading to the general assessment of its food tourism potential.

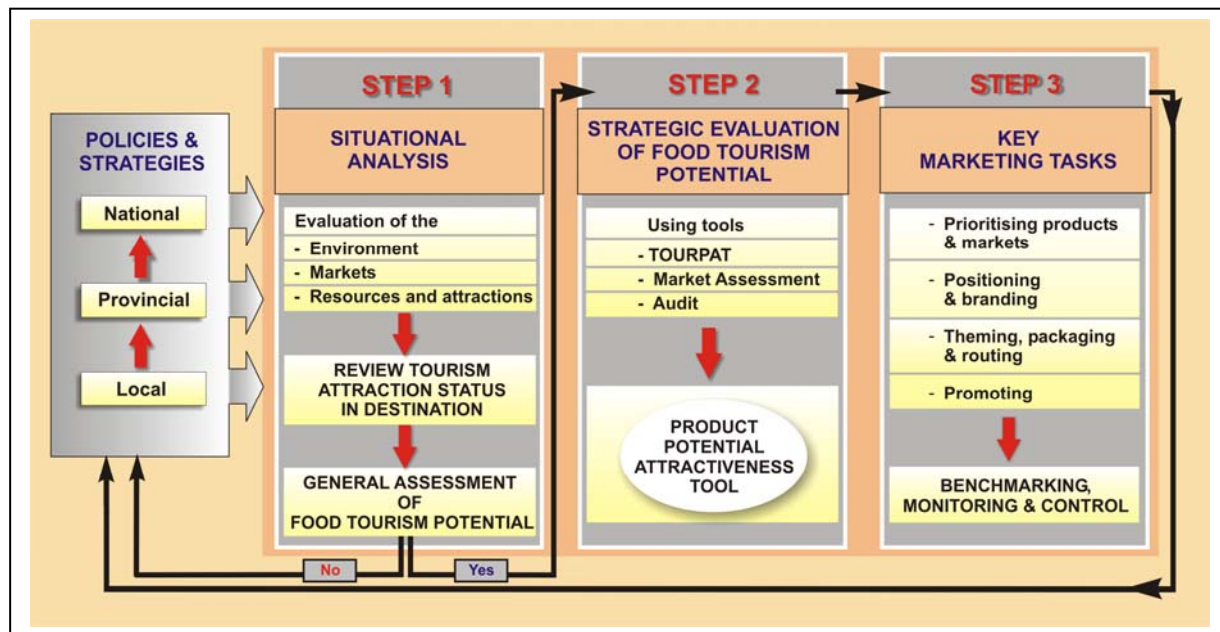


Figure 7.1: Strategic Food Tourism Destination Marketing Framework

If at this stage of the procedure, the information screened portrays no viable potential regarding the development for food tourism, the DMO needs to return to the policies and strategies of the relevant tourism bodies. The DMO would have to revisit the existing policies and strategies in place and reassess the potential for food tourism based on the evaluation of the environment, markets, resources and attractions. However, if the information screened portrays a viable potential concerning the development for food tourism, the DMO proceeds to step two, which entails the strategic evaluation of the food tourism potential at the destination. Various tools are used, namely TOURPAT, a market assessment and food attractiveness audit, culminating in the application of Product Potential and Attractiveness Tool to assist the DMO in assessing the food tourism potential for the specific destination at a strategic level. The DMO now proceeds to step three to identify and perform key marketing tasks. Finally, procedures for benchmarking, monitoring and control must be put in place and the outcomes of the strategic approach regarding the development and implementation of food tourism at a destination, determined.

The DMO then provides feedback to the local, provincial and national bodies to facilitate the incorporation of food tourism as a component in future tourism strategy and policy development. The procedure and each step are discussed in the next section and the application of the framework is illustrated in the case study in Section 7.7.

7.3 SITUATIONAL ANALYSIS

The situational analysis approach was selected for this study as a method of gathering and organising data (Chapter 5). It features as the first step of the Strategic Food Tourism Destination Marketing Framework (Figure 7.1) as it assists a DMO to gain insight into the potential for food tourism and helps to determine its role in destination marketing. It is assumed that an umbrella situational analysis would have been performed for the destination at large as part of the total strategic planning process covering all aspects required including the preliminary exercise of interrogating existing policy documents (Figure 7.1). With this accomplished, food tourism can be addressed as a specific focus area. Food tourism can also be combined with wine tourism in the regions where wine tourism is already established.

Tourism data required for assessment purposes includes information from a variety of sources. Various secondary materials can be used to collate the information required for the situational analysis. Dunn and Hurdus (2002:1) suggest the following:

- Media material;
- Reports by tourism organisations and associations;
- Project papers by tourism developers in the various regions, such as the Global Competitiveness Project (South African Tourism, 2004);
- Government planning/development papers;
- Government strategies and policy papers, such as the White paper on the Development and Promotion of Tourism in South Africa (Government of South Africa, 1996);
- Tourism company annual reports;
- Academic research papers;
- Tour guidebooks;
- Destination marketing/ promotional materials;
- World Wide Web;
- Maps;
- Photos; and
- Videos.

The wide field of available material complicates the execution of a situational analysis so FOODPAT was developed and TOURPAT implemented as the tools. The techniques they offered facilitated the rapid assessment of the potential for food tourism in a destination.

Dunn and Hurdus (2002:2) also recommend the collection of primary data such as:

- **Questionnaire surveys** for tourists, residents and local tourism providers. This study executed the collection of data from tourism offices (DMOs) on a local, regional and provincial level by means of a questionnaire survey.
- **Semi-structured interviews** to determine the social and environmental impact. Such interviews were undertaken with experts in the field of food tourism, which provided additional information and highlighted strategic key issues.
- **Field observations** utilising various techniques and tools for an attractions inventory, infrastructure assessment, special events and service quality performance. Field observations were included in the execution of the case study and captured by the participants and researcher.

The available resources, methods of data analysis and tools and techniques used facilitated the execution of the three components of the situational analysis as described in the next section.

7.3.1 Evaluation

The evaluation of the environment, markets and resources and attractions comprises the first component of the situational analysis. The evaluation of these three aspects is imperative as it provides information that is useful as the baseline for assessment to reveal the environmental, marketing and attractions profile of the destination. This step leads to establishing answers to the questions *where are we now?* and *what do we have?* Environmental, market and attractions and resource analyses are the techniques at this stage. The envisaged outcomes and results of the evaluation component provides clarity on key challenges, opportunities and threats, attractions and resource status, visitor profiles and key competitor analysis (Heath, 2002).

7.3.1.1 The environment

Information on the environment entails the identification of the **stakeholders and the roles they perform** and possible **leaders/ champions** in the field of food tourism. Stakeholders refer to all those organisations and their constituencies, ranging from local authorities to

community interest groups and businesses, which are involved in or impacted by tourism at the particular destination. Stakeholder groups can be directly or indirectly involved in providing products or services to create or facilitate food and wine experiences, e.g. food and wine attractions, facilities, restaurants, entertainment and other facilities, travel agencies and so forth. The development and implementation of food tourism in a destination is dependent on the needs and demands of the tourist, the ability and interest of the stakeholders and the passion of leaders/champions to drive the initiative and to deliver a quality product. An identification of key stakeholders and leaders encompasses an organisational analysis of the tourism sector in the specific destination with regard to its co-ordination and management. According to Dunn and Hurdus (2002:6) a well-established tourism organisation at different levels can facilitate tourism development and therefore also food tourism. The information required to determine the organisational structure could include the following:

- Government tourism organisations and their hierarchical structure;
- Responsibilities of government offices at various levels;
- Tourism budget information;
- Relationship and co-operation of parastatal organisations and agencies;
- Coordination and facilitation with the private tourism sector;
- Local/regional tourism industry professional associations and agencies;
- Local/regional tourism non-profit organisations;
- Marketing/promotion agreements with communities in the region; and
- Relationship and co-operation with private stakeholders/individuals fulfilling a leadership role in tourism activities.

Much of the abovementioned information would be available from government tourism offices, tourism strategic plans and policy documents of government tourism offices and financial and annual reports of government offices.

An evaluation of **macro trends and developments** in the environment, which represent the *uncontrollable* factors to which DMOs, TBUs and stakeholders have to adapt, include social, political, technological, economic and demographic factors will assist in determining possible threats and/or opportunities (Heath, 2002:20). An umbrella situational analysis for the destination at large as part of the total strategic planning process would identify the environmental forces that need to be taken into consideration during strategy development. According to Heath (2002:34) within the context of destination marketing the following aspects should be included in an environmental analysis:

- Analysis of **macro-environmental factors** that influence the destination and its stakeholders. These include economic, socio-cultural, political, technological and ecological factors;
- Analysis of the **existing and potential markets**;
- Evaluation of **key competitors**; and
- Identification of **strategic opportunities and threats**.

Relevant information needs to be extracted from the various sources of information and collated when preparing the evaluation of the environment as a component of the Strategic Food Tourism Destination Marketing Framework. From this the possible threats and opportunities can be recognised.

7.3.1.2 Markets

Information regarding the market comprises the identification of the **suppliers of food tourism offerings** particularly linked to restaurants/food service institutions and other food events, activities or experiences and the **target market**. To gauge the need and potential for food tourism at a destination, an investigation into the current and potential market environment across the board (local/regional/provincial/national/international) is necessary. Worthwhile information can be gleaned from the DMOs and the TBUs with a specific interest in promoting food tourism and linked to the destination. It is imperative to explore the supply (DMOs and TBUs) and demand (tourists) components of the market as well. Through these endeavours the food tourism products can be positioned and the extent, to which they would satisfy the target market, can be assessed.

According to Heath (2002:50) *a key task in destination marketing is to monitor and analyse trends and changes in the needs and perceptions of the destination's existing and potential markets*. This task requires the development of visitor profiles and the projection of these profiles utilising market surveys and considering global and local trends to culminate in the development of a target market profile and to allow for the evaluation of future potential visitor target markets. The assessment of the tourism market can also be used as a guide for establishing potential markets for the destination. Analyses of travel interest in the destination and noticing major present and future travel markets would also be useful exercises (Dunn & Hurdus, 2002).

Furthermore Heath (2002:52) proposes a prioritisation of markets in terms of major sources of visitors and revenue to the destination, allowing a destination to concentrate on the

markets with the most potential. Further consideration must be given the destination's capacity to deliver the travel (food) experiences required; the competitive situation; and visitor and revenue statistics pertinent to the destination (Heath, 2002). The prioritisation on destination level enables a DMO to focus its marketing efforts of the destination at markets that have the most potential in the long term.

In considering these key tasks required to determine the market profile of the destination, it is important to keep in mind that the focus of this study is food tourism. Since all tourists eat and drink at a destination, food is provided as a general good and service to all tourists. The challenge of food tourism, however, lies in the nature of the experience offered as an attraction of the destination, accommodating the preferences of the tourist and the level of interest in food tourism *per se* at the destination. Therefore both the supply and demand of such experiences will influence the viability of developing and implementing food tourism in a particular locality.

The information required to perform the market analysis includes the following:

- Lists of:
 - Suppliers of food tourism offerings
 - Restaurants
 - Food service institutions
- Tourism market by origin local/ international;
- Tourism market by nationality/ country; and
- Tourism market by segment e.g. leisure tourists.

The information would be available from national, regional and local tourism offices, tourism business units, destination surveys, studies and reports, relevant websites, visitor and guest surveys, travel and tourism studies, projects and reports, local community market studies and visitor market profiles compiled by provincial and regional tourism offices.

The compilation of the market profile as part of the evaluation component executed during the situational analysis is to provide the DMO with an indication of the viability of food tourism as an attraction in the destination. Therefore, during step one, only the information regarding the availability of suppliers and the target markets with a possible indication of the tourist profiles, regarding activities and preferences needs to be identified and extracted from available information.

7.3.1.3 Resources and attractions

An identification of the attractions and resource components of the destination is essential for the determining strengths and/or weaknesses specifically related to food tourism. This component of the situation analysis reviews the key strengths and weaknesses of the destination mix relative to significant strategic competitors (Heath, 2002). The Seven A's Framework for resource analysis is proposed by Heath (2002:66) includes the following categories: attractions; accessibility; accommodation and amenities; activities; ancillary services; attitude; and available packages.

Since attractions are the magnets that draw visitors to a destination they are regarded as the primary components of a tourism system – in fact, all other tourist services exist because of them (Dunn & Hurdus, 2002; Heath, 2002) as discussed in Chapter 2. Food as a tourism attraction at a destination also exists only once it has been recognised as containing elements that people want to experience (Heath, 2002). Food and drink, however, are the only attractions at a destination experienced by utilising all one's senses. According to Wolf (2004) food tourism is the new niche tourism as the partnership between food and tourism has become more important. Food, as a tourism attraction, has the potential to be positioned in a supportive role and, depending on the resource availability and target market preference as a key attraction in certain destinations. This study's research results can endorse this observation (Chapter 6).

In order to execute the situational analysis for the resource and attraction evaluation it was imperative to focus on the resource component mix regarding attractions, infrastructure, facilities and services specifically for food tourism available in a destination and to rate them according to availability and utilisation. Additionally it was also necessary to acknowledge the resources with potential but not being utilised at the destination. The reason for identifying these resources was to determine the potential for offering food tourism in terms of available resources and attractions despite the fact that DMOs were unaware of the possibilities food tourism could offer at a destination by DMOs as revealed in the findings reported on in Chapter 6.

The information required to perform the resource analysis regarding food tourism could include the following:

- **Attractions - the drawing card:** activities (markets/ shows); events (festivals/fairs/rituals); culinary heritage; cultural villages; farms; factories; routes;

- **Infrastructure- essentials to tourism development:** restaurants; signage; agricultural sector; communication; roads/ accessibility; safety (food/water);
- **Facilities – requirements for tourism offerings:** cellars; wineries; road stalls/farm stalls; museums; stores/ speciality stores; estates; and
- **Services – essential to satisfying the tourism experience:** tours; hospitality; accommodation; cooking schools; training.

The information would be available from national, regional and local tourism offices, tourism business units, destination surveys, studies and reports, relevant websites, resource inventories and surveys, travel and tourism studies, projects and reports, tourism product providers as was the case with other variables investigated in this study such as markets and attractions.

The execution of the resource and attraction analysis would provide the DMO with an indication of the availability of attractions, the adequacy of the infrastructure, the level of tourism offerings and the amount and type of services available to satisfy the food tourism experience to once again determine the viability of food tourism as an attraction in the destination. Therefore during step one only the relevant information regarding the availability and utilisation of resources needs to be indicated and extracted from available information.

Once the situational analysis is completed, the nature and extent of a food tourism focus must be outlined and put into context. This can be done by means of an identification of current key challenges, opportunities and constraints of the destination regarding the optimisation of food tourism from the previously executed environmental, market and resource and attraction evaluations. The compilation of this information can be incorporated in future tourism policies and strategies, if it is not already a component of the policy and strategy at this stage.

7.3.2 Review of Tourism Attraction Status in a Destination

Once the evaluation of the environment, markets, resources and attractions has been completed, it is necessary to **review the tourism attraction status** of a destination. The aim of this step is to not only determine the present existing attraction status and potential attractions for future development, but more specifically to also to find out about the status of food tourism in comparison with other types of attractions in the light of planning for future developments. The attraction status can be classified as key, supportive, minimal or no

attraction. The types of attractions can include the following: natural attractions; cultural/heritage attractions; outdoor/recreational activities; special interests; wine; food; major/special events; special routes; sports/health; and any other attractions that do not fit the above categories. It is important is to classify the attractions of the destination as presented above. This process was done for the various provinces and regions in this study and the position of food tourism determined. The results as presented in Chapter 6, vary for the nine different provinces but portray a view similar to what has been reported in the literature, namely that food is not a key attraction and fares much better as a supportive attraction. However the supportive component has not achieved its potential and requires strategic support to elevate its potential as an attraction at a destination.

The information sources for attraction assessment would be available from national, regional and local tourism offices, tour books such as Explore that was used in this study, destination surveys, studies and reports, relevant websites, attraction inventories and surveys, travel and tourism studies, projects and reports, tourism product providers.

The review of the tourism attraction status provides the DMO with an indication of the existing attraction status and an indication of potential attractions for future development. The tourism attraction status will be determined by the availability and utilisation of resources and attractions that were assessed in the evaluation component of the situational analysis.

7.3.3 General Assessment of Food Tourism Potential

Finally, a general assessment of the food tourism potential is necessary to ascertain whether it is feasible to proceed with the development of food tourism as an attraction at a destination or not. This can be determined by assessing the food tourism market share and position as an attraction in the destination. The information gleaned from the review of the attraction status can be applied to assess the position and importance of food as a tourism attraction. Food as an attraction needs to achieve at least a supportive role to be considered as a viable tourism attraction. In the results presented in Chapter 6, food did achieve a supportive role on a national scale in South Africa. However, many gaps and constraints still hamper the development of food as an attraction on provincial and regional level in South Africa.

7.3.3.1 Food tourism market share and position

The **food tourism market share and position** can be assessed by determining if food tourism is credited with a key / supportive / minimal or no attraction status. This is only a general and initial assessment and the in-depth analysis to determine the food tourism

market share and position can be verified and substantiated with the execution of an audit and the information from FOODPAT.

The information obtained from the situational analysis thus far provided the baseline data required for this initial assessment. Therefore the evaluation of the environment, markets and resources and attractions, plus the review of the tourism attraction status can collectively provide the general and initial assessment required to determine the food tourism market share and position.

The evaluation of the environment, markets, resources and attractions and the tourism attraction status would be done according to core indicators of food and tourism and the specified criteria as already described in the text. Should the review yield a meaningful result indicative of recognisable potential, the next step would be to perform a more **in-depth and comprehensive information analysis** to quantify and qualify the potential for food tourism at a destination. If no meaningful potential is identified, it is recommended that food tourism as an attraction and priority in destination marketing be revisited.

All three components of the situational analysis need to be performed before proceeding with step number two, which entails a **strategic evaluation of the food tourism potential** of a particular destination.

7.4 STRATEGIC EVALUATION OF THE FOOD TOURISM POTENTIAL

The second step in developing the food tourism framework (Figure 7.1) is to effect a strategic evaluation of the food tourism potential at the destination by cumulatively applying TOURPAT and FOODPAT as tools, assessing the market, executing a food attractiveness audit and finally using the Product Potential and Attractiveness Tool. In this way the potential and strength of food tourism is measured through information management and marketing research.

Much of the required information can be extracted from national, regional and local tourism policies and strategic planning processes or from databases such as TOURPAT and FOODPAT then applied in the Strategic Food Tourism Destination Marketing Framework. The development and application of the tools used in this study will be presented in the next sections.

7.4.1 Tools

The ultimate goal of this study is to develop a Strategic Food Tourism Destination Marketing Framework and provide guidelines to optimise the tourism potential of local and regional foods in future destination marketing and particularly to provide appropriate tools and techniques that can be used to assist in decision-making regarding the development and implementation of food tourism at a destination. To achieve this goal, the application of TOURPAT, FOODPAT, a market assessment, a food attractiveness audit and the development of the Product Potential and Attractiveness Tool which contributed to the food tourism strategic approach for optimal and responsible development and implementation of food tourism in destination marketing were utilised.

When embarking on this study with its specific scope and focus, the magnitude of information available was overwhelming. Thus confronted, it was clear that tools and techniques to facilitate and speed up the strategic evaluation of the food tourism potential of a destination were essential. Additionally these very instruments would be even more effective if exposed to validity and reliability assessment procedures to determine the potential for food tourism in a destination as would methods of convergence, presentation and interpretation of the data when putting food tourism on the map.

Brown (2004:727) contends that, whereas traditional analysis and techniques can be used to understand patterns within small groups, in cases where there are large amounts of information that are challenging to organise and interpret, the utilisation of GIS facilitates the processing of the data appreciably. This was the case in this study where a situational analysis of all the tourism regions in South Africa was performed. The use of GIS not only made data collection, analysis and presentation more manageable but also made it possible for this to be done on a national, provincial and regional level, thereby accommodating limited time and financial constraints.

7.4.1.1 *Geographic information systems (GIS)*

As food tourism and the use of local and regional foods as a destination-marketing tool has a close relationship with space and geography, selecting tools utilising geographic information systems (GIS) proved relevant and appropriate for this study. According to Feng and Morrison (2002:127) and Nath, Bolte, Ross and Aguilar-Manjarrez (2000) use of GIS applications in tourism marketing and resource management initially have been limited presumably because of a lack of know-how and benefits regarding GIS, and inadequate organisational commitment regarding the use of these decision support tools. However, as

GIS has become more affordable its application in tourism has increased, supporting the realisation that it is a powerful enabling technology (Bertazzon *et al.*, 1996; Bradbury, 1996; Elliott-White & Finn, 1998; Feng & Morrison, 2002; Opperman, 1997; Yianna & Poulicos, 2003).

Nevertheless, caution voiced by Feng and Morrison (2002:127) that GIS should not be used in isolation, but be applied as a valuable tool in tourism marketing and research. Furthermore, GIS should be viewed as an information tool to assist and provide support in decision-making and not be regarded as a decision-making tool in itself. It is also becoming more and more apparent that the integration of GIS with other techniques and tools enhances its contribution (Feng & Morrison, 2002). This study took cognisance of all these points realising that combining GIS together with the other selected tools and techniques would lead to achieving the outcomes of this study most pertinently.

GIS according to Nath, *et al.* (2000:235) is *an integrated assembly of computer hardware, software, geographic data and personnel designed to efficiently acquire, store, manipulate, retrieve, analyze, display and report all forms of geographically referenced information geared toward a particular set of purposes.* This description befits this study. The culinary database, FOODPAT, is food-tourism focused and geographically referenced according to province, tourism region, and magisterial district. It formed the basis for the situational analysis that sought to investigate the current use of local and regional foods as a tool in destination marketing, thereby identifying the food tourism potential in the various tourism regions within South Africa.

Feng and Morrison (2002:127) describe GIS as a type of information system. A key component is the spatially referenced and multi-layer database, consisting of geographic/spatial data and attribute data. Geographic data is expressed explicitly (a standard geographic reference e.g. latitude and longitude) or implicitly (a replacement spatial reference e.g. postal code or address). Attribute information comprises non-location data and their statistics that fall within a specific geographical area (Feng & Morrison, 2002). GIS thus function as information, communication and analytical tools as it integrates mapping, analytical and relational database information and handles geographical and attribute data (Elliott-White & Finn, 1998:69; Turkstra *et al.*, 2003). Yianna and Poulicos (2003) contend that GIS can be used for managing the information as required, estimating indicators and assisting decision making processes during the planning stage as well as contributing to the monitoring and evaluation phases.

According to Elliott-White and Finn (1998) GIS is increasingly being used as a marketing tool in various business contexts including tourism. As discussed in Chapter 2, new approaches to tourism marketing are required as a result of increased competitiveness, market growth and the changing preferences of the tourist. GIS provides a range of appropriate and useful tools for analysis required by marketing managers in tourism (Bertazzon *et al.*, 1996; Elliott-White & Finn, 1998; Opperman, 1997). Tourism marketing according to Bertazzon *et al.* (1996) involves spatial data and therefore GIS can be used with the marketing research steps such as data collection, analysis, interpretation and report preparation. Bertazzon *et al.* (1996:54) suggest in their research that GIS could contribute to tourism marketing in three different ways, namely *enabling development of new services, improving customer services and outreach and market research*. GIS is useful as it facilitates tourism planning and management, which involves multiple agencies and a wide variety of information to execute a complex decision-making process.

The main objective in using GIS is to provide a decision-making support tool that can assist with the identification and mapping of the spatial distribution of food tourism in destination marketing. This information is portrayed visually utilising GIS (geographic information systems) techniques and displayed in the form of 'thematic maps' providing visual information of a destination regarding one or more of the resources. Layers can be compiled visually to show the different categories of products available in an area (food / wine/ agricultural / culture/ food tourism opportunities and attractions / routes, etc.).

The ability of GIS to integrate, store, and manipulate different data sets, which include qualitative and quantitative, spatial and non-spatial is of immense value (Yianna & Poulicos, 2003). GIS was used in this study as an analytical tool and to facilitate the communication of large amount of information in a user-friendly fashion. However, GIS is also applied as a strategic tool and a very important component of the Strategic Food Tourism Destination Marketing Framework, which was constructed to develop and implement food tourism in a destination.

The procedure of applying techniques and technology based on GIS is described and explained for the purpose of clarity as a component of this study. During the application of the Strategic Food Tourism Destination Marketing Framework, much of this information will be available or can be sourced from TOURPAT and FOODPAT, which would provide DMOs with the required information necessary to apply the Product Potential and Attractiveness Tool to determine and assess the food tourism potential at a destination.

7.4.2 TOURPAT

TOURPAT is a Tourism Potential Atlas that is a part of the ENPAT⁷ project (Jordaan *et al.*, 2001) and was selected as the GIS tool for this study as it was developed for South Africa and includes a tourism component. ENPAT, the Environmental Potential Atlas is a project that falls under the auspices of the National Department of Environmental Affairs and Tourism (DEAT) in collaboration with the University of Pretoria. ENPAT/TOURPAT serves as a user-friendly GIS tool for environmental management and sustainable development. It provides various data components that consist of spatial maps and other supporting data of attributes in a specific area. ENPAT/TOURPAT also offers decision-making tools such as environmental management frameworks, maps and various other parameters and guidelines. ENPAT consists of two parallel sets of information, biophysical characteristics and socio-economic factors. TOURPAT has been added to ENPAT to provide information important to tourism, culture and architecture. Certain components are available on a national scale and others at a provincial level. Information of tourism importance that is currently included in TOURPAT and relevant to this study are listed in Annexure 10.

7.4.2.1 *The functions and benefits of TOURPAT*

The functions and benefits of TOURPAT are, tourism development, management of tourism resources and the utilisation of natural and cultural resources namely the local and regional food, food events, food attractions and culinary heritage of a region. As food and cuisine are part of the cultural component of a country, the information of FOODPAT will be imported and added to TOURPAT, then integrated into the tourism component to create a tourism and culinary atlas linked to a geospatial database.

The incorporation of FOODPAT into TOURPAT, contributed to the Strategic Food Tourism Destination Marketing Framework for optimal and responsible development and implementation of food tourism in destination marketing, by giving tourism information specifically related to food to various users, such as:

- **The tourism community:** TOURPAT represents a combination of various sources and types of information and graphic presentation which makes it a powerful communication tool (Turkstra *et al.*, 2003). TOURPAT as a tourism potential atlas could stimulate participation of the various stakeholders regarding the development and implementation of food tourism in the various tourism regions within South Africa.

⁷ The 2001 version of ENPAT/TOURPAT is used in this study and is based on the 1996 census data.

- **Researchers and planners:** TOURPAT contains environmental graphical representations which are the collection of a variety of thematic maps and systemised geographic information that facilitates the combination of different datasets to discover spatial relationships and the exploration of problems and potentialities (Turkstra *et al.*, 2003).
- **Planners and decision makers:** as TOURPAT facilitates knowing where food related information required for the development and implementation of food tourism is and why (Turkstra *et al.*, 2003). The amount and quality of information can make a difference between good and poor management according to Turkstra, *et al.* (2003:9). GIS can be used in business analysis as it produces information regarding decision-making, planning, controlling and marketing activities (Elliott-White & Finn, 1998). Strategy planning and decision-making is facilitated by the availability of information and can therefore be based on facts enhancing and streamlining the planning processes (de Man & van den Toorn, 2002; Turkstra *et al.*, 2003). TOURPAT ably supports the management and marketing tasks at a destination by providing background information that will strengthen the continued use and further development of GIS.

7.4.2.2 Use of TOURPAT

The strategic evaluation of food tourism potential can be achieved by using a key knowledge tool such as TOURPAT that can be applied to promote the growth of food tourism as an important element of destination marketing. TOURPAT as a geo-spatial database comprises information reflecting the various tourism resources. GIS offers utility to tourism marketing and allows a DMO to customise the relationship between them to meet the needs of the segments it wants to serve (Elliott-White & Finn, 1998). In this study food and tourism are brought together to meet the supply and demand situations at a destination.

The procedures described in the next section can be performed to collate the required information from TOURPAT, which could be made available to assist stakeholders and tourism providers during the strategic evaluation of food tourism potential step.

According to the New York State Archives GIS Development Guide (1996) the single most important activity in GIS development is database planning and compilation. Nath, *et al.* (2000:238) verify the importance of data and identify seven phases in a GIS study, namely :

- *identifying project requirements;*
- *formulating specifications;*
- *developing the analytical framework;*

- *locating data sources;*
- *organising and manipulating data for input;*
- *analysing data and verifying outcomes; and*
- *evaluating outputs.*

As TOURPAT did not feature sufficient or adequately focused data on food and its interrelatedness with tourism, a culinary database FOODPAT was developed. The phases of a GIS study as proposed by Nath, *et al.* (2000:238) were used as a guideline for the GIS component of this study and will be addressed in the subsequent sections.

The **project requirements** were determined by the needs of the user(s) and the available resources. These requirements can differ from one destination to the next, but for the purpose of this study the **needs of the user** (aims) were identified as:

- the development of a **culinary database, FOODPAT** utilising GIS that would contribute to TOURPAT and provide information regarding food tourism in South Africa; and
- the development a **food tourism competitiveness status checklist** for the various tourism regions in South Africa, namely a **Product Potential and Attractiveness Tool**, which identified the food tourism components in a destination and assesses the potential and subsequent enhancers for food tourism in a destination.

The development of FOODPAT, a specific objective for this study, is explained in the following section.

7.4.3 Culinary Database: FOODPAT

The culinary database, FOODPAT, is a resource inventory, specifically focussing on food tourism data (agriculture; culture; infrastructure; tourism infrastructure and attractions; tourism routes; food and wine attractions, events and facilities) indicating what is available at a destination. Such inventories are used for both natural and man-made resource management, resource allocation and land-use planning decisions (Yianna & Poulicos, 2003). Tourism resource inventory frameworks, as used in a case study of British Columbia, recorded data on tourism resources, uses and capabilities and highlighted the potential for different forms of tourism development in an area (Yianna & Poulicos, 2003). In this study the potential for the development for food tourism needs to be identified and assessed.

The construction and compilation of FOODPAT is described in Chapter 5, section 5.2.3 and is the database required for the execution of the situational analysis for this study. Microsoft Access was used to construct and compile the culinary database FOODPAT, which comprises a collation of data reflecting the core indicators for food tourism namely food and tourism according to the criteria selected for the compilation of the core indicators as displayed in Figure 7.2, and presented in more detail in Annexure 4.

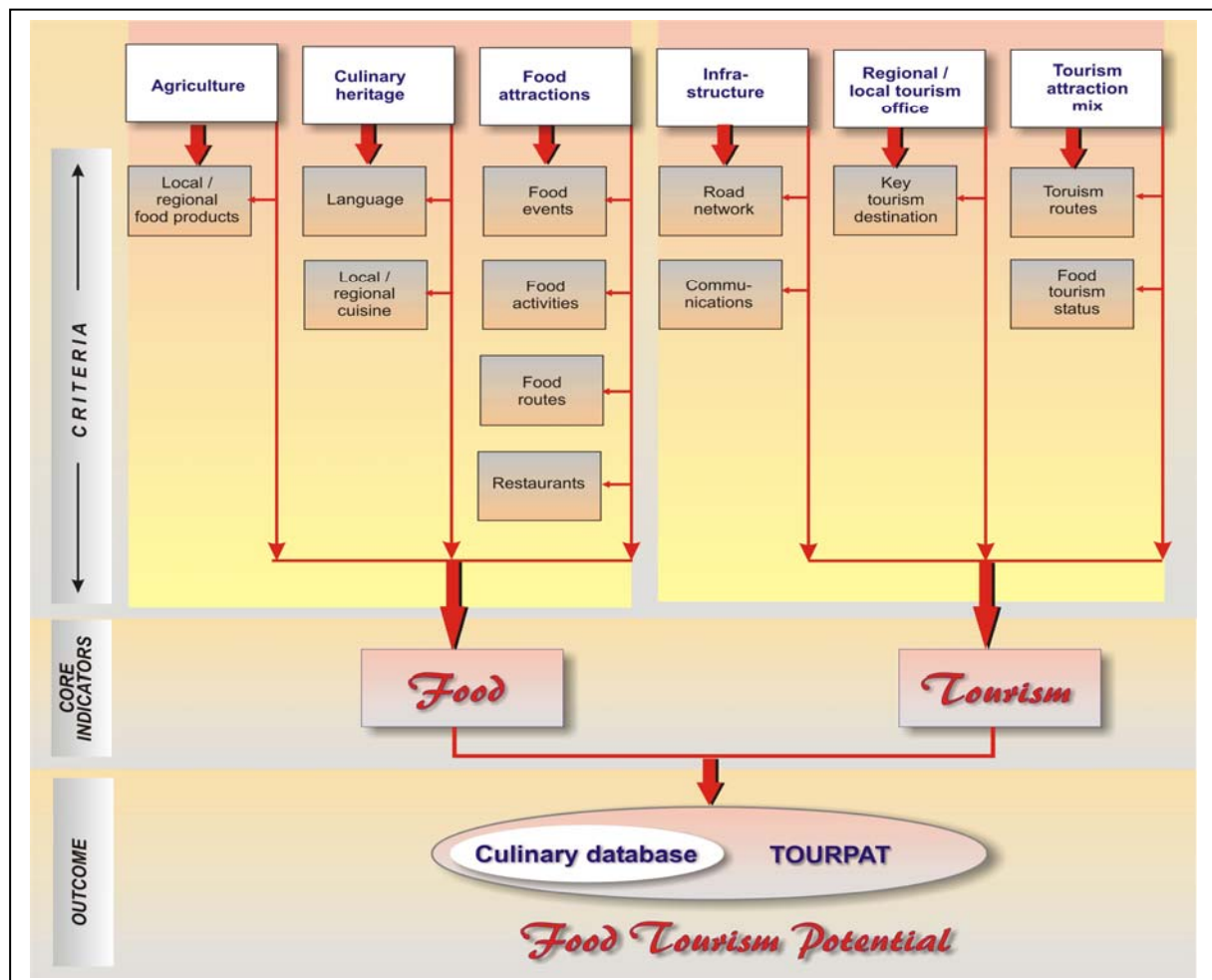


Figure 7.2: Core indicators and criteria utilised in the compilation of the culinary database FOODPAT

7.4.3.1 Data compilation in FOODPAT

The data collected for the development of FOODPAT was mined from the various sources as outlined in Chapter 5, and included information reflecting all the tourism regions in South Africa.

It was collected according to predetermined categories and reflected specific main fields, comprising various subfields (Annexure 4). Once the database had been developed the data was transposed to Microsoft Excel for use in the GIS programme that allowed for geographic visualisation of the data and enabled statistical calculations. A further advantage was that Microsoft Excel allows for continuous updating of the data and incorporation of additional items and or categories not initially included in FOODPAT.

To illustrate the type of information collated an excerpt of FOODPAT (Table 7.1) gives the food information for the Western Cape using the data of Section C, food events/activities (tours; festivals; shows) present in the various regions within the province of the Western Cape.

Table 7.1: Collation excerpt of FOODPAT

Region & Province [1]		T-CODE	REGION	Area	Township	Farm	Factory	Product	Tot C_Tours_WC	C1-Yes=1; No=0	Food	Wine	Wine & food	Beer	Harvest	Area	Activity	Tot C_Festivals_WC	C2-Yes=1; No=0	Agricultural	Food industry/trade	Wine	Cuisine	Tot C_Shows_WC		
V76	V77			9DC001	9DC035	9DC002	9DC003	9DC004	9DC005	9DC006	9DC007	9DC008	9DC009	9DC010	9DC011	9DC012	9DC013	9DC014	9DC015	9DC016	9DC017	9DC018	9DC019	9DC020		
Western Cape	2	CAPE METROPOLITAN TOURISM	0	0	0	0	0	0	0	0	0	1	1	1	0	0	1	4	1	0	1	0	0	1		
Western Cape	3	CENTRAL KAROO	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	1	1	1	0	0	0	1		
Western Cape	4	GARDEN ROUTE	1	0	0	0	1	2	1	1	0	1	1	0	0	0	0	3	1	1	0	0	0	1		
Western Cape	5	KLEIN KAROO	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	2	1	0	0	0	0	0		
Western Cape	7	WEST COAST	0	0	1	0	0	1	1	1	4	0	1	0	1	2	1	9	1	5	0	0	1	6		
Western Cape	1	BREEDE RIVER VALLEY	1	0	0	0	1	6	1	0	3	2	0	1	0	0	0	7	1	2	0	2	0	4		
Western Cape	6	OVERBERG	1	0	1	1	2	5	1	7	0	2	0	0	0	0	0	9	1	4	0	0	0	4		
Western Cape	8	WINELANDS	1	0	1	0	0	2	1	3	2	2	0	1	0	0	0	8	1	1	0	0	0	1		
Total_Main_Field									16	Total number of regions [6]										43						18
TOTAL_WC		Total Subfield	4	0	4	4	4			5	15	7	9	2	4	3	3			8	14	1	2	1		
Total of subfield [4]									5	out of 8 regions										8	out of 8 regions					

The data in FOODPAT can be identified from a regional to a provincial level [1]. The presence of the various items are indicated for each region and a physical count of each is portrayed, thus in the West Coast there are tours in one category namely farms tours, which

gives it a score of 1 (score in red) [2]. The score in blue indicates if item is **present** (1) or **not** (0) [3]. The figure also provides **totals** for each **subfield** [4], that is, for each type of tour present in the province. The **total** of all **main fields** namely tours in this case are portrayed by [5] in red and are 16 for the tours offered on all the regions of the Western Cape. The **total number of regions** offering tours is indicated by [6] and is 5 out of 8; all information included in FOODPAT was collated in this manner.

The data included in FOODPAT is by no means complete, as it is a reflection of the data available at the time of compilation. FOODPAT needs to be updated on a regular basis to achieve the maximum value as a decision-making support tool during strategy development.

7.4.3.2 Advantages of FOODPAT

The advantage of FOODPAT is that it provides an immediate assessment of a region /province with regard to food information (A); food attractions (B); and food events and activities (C). This information acts as a decision making support tool in that it can be used to compile the SWOT profile of the destination as component of the situational analysis. The resource base and attractions are identified, so the layers required for the data processing and presentation steps are available. The information can be incorporated for the focused strategic evaluation of the food tourism potential at a destination and into TOURPAT, which, in turn, culminated into a tourism and culinary atlas, linked to a geospatial database.

Elliott-White and Finn (1998:80) recommend that DMOs need to develop information systems and methods of information dissemination, FOODPAT is an example of such an information system. Small tourism organisations often do not have the capacity or resources to design, capture and supply information to a management structure (Elliott-White & Finn, 1998; Turkstra *et al.*, 2003), which restricts the application of GIS. Elliott-White and Finn (1998:78) make the following recommendation: *Tourism consortia could play a part in alleviating restrictions, particularly in terms of access to databases, data capture and expertise. DMOs could take a lead role in establishing such consortia, which would benefit tourism providers but also the destination itself.* The setting up of FOODPAT and the extension of TOURPAT is the GIS tool available to DMOs and if made available to stakeholders at a destination would provide similar benefits to the food tourism providers and the destination itself. The utilisation of GIS tools and technology regarding food tourism adds value and could contribute to the competitive advantages of a destination (Elliott-White & Finn, 1998). Furthermore, according to Bahaire and Elliott-White (1999), GIS offers significant scope for sustainable tourism, both in terms of planning and management. It has

the ability to promote integrated management of resources based on the needs of local communities and visitors to the destination.

7.4.3.3 Contribution of FOODPAT

Besides the advantages that the development of FOODPAT established as a research and decision-making support tool, it can also contribute to the marketing of the destination where focus on competitiveness and sustainability are of utmost importance as described in Chapter 2. Elliott-white (1998:79) contend that new marketing paradigms require information tools, such as GIS that can transform data into intelligence and induce action. Opperman (1997:1) supports this viewpoint and stresses the fact that data-based marketing will become a strong aspect of tourism marketing. The value of a database, utilising GIS, such as FOODPAT and TOURPAT is clear, and the most important and labour intensive component is the integration of information and the capturing of the data, which is achieved by FOODPAT.

7.4.4 Utilising TOURPAT and FOODPAT toward the Strategic Evaluation of Food Tourism Potential

The procedures described in the next section were performed to collate the required information from TOURPAT and FOODPAT that would be made available to assist stakeholders and tourism providers during Step 2 of the Strategic Food Tourism Destination Marketing Framework, namely the strategic evaluation of the food tourism potential in a destination.

To perform the strategic evaluation of food tourism at a destination the seven phases as suggested for use in a GIS project (Section 7.4.2.2), were used as a guideline. Each phase is briefly outlined and contextualised in the following sections.

7.4.4.1 Phase one

The first phase, namely the process of **identifying the project requirements/aims for this study**, was discussed in Section 7.4.2.2. The reason for including this information is to provide the background of what a GIS project/study entails. In practice the DMOs and stakeholders themselves will not execute these steps and procedures but the work will be done by GIS analysts and subject specialists and made available to the end-users. It is, however, important that the end-users understand the data requirements and the possibilities that GIS offers as a decision-making support tool.

7.4.4.2 Phase two

The second phase in a GIS project, **formulating the specifications**, corresponded to the specific requirements of this study as stipulated by the users of the tools and techniques. Once again these requirements could differ from one destination to the next but for this study the **functional specifications** were identified as:

- generating a **culinary atlas**, utilising **core indicators and criteria** (Figure 7.2) to indicate food tourism potential;
- producing **thematic maps** for example, the availability and presence various food attractions and events (Figure 7.3);
- the compiling **map layers** to portray the environmental context, the tourism attraction/experience and the food tourism/ agricultural product/ culinary heritage identification (Figure 7.3);
- being able to add **food tourism related data** to the existing ENPAT/TOURPAT;
- determining the **present situation** regarding food tourism in the various destinations in South Africa and comparing it with the potential for food tourism; and
- providing **additional data** (textual), such as information regarding the routes, the stakeholders; the cuisine/ culinary heritage/ use of local/regional produce; and to link to other information, for example restaurant websites.

This part of the process involved an in-depth analysis of study requirements and collaboration with the subject specialists and the GIS analysts who would present the information to the end users, namely, the stakeholders. The stakeholders would really only be concerned with the information they require to perform a strategic analysis of food tourism at their destination and not with the technical procedures and processes applied to compile the required information and specifications (Nath *et al.*, 2000).

7.4.4.3 Phase three

Integrating the spatial information into a useful format for analysis and decision-making occurred in the next phase namely **developing an analytical framework**, the third phase of the GIS project. It comprised the following:

- First, composite attribute information from secondary sources e.g. restaurants; food products; food events, attractions and activities; tourism attractions; existing routes; and tourism destination information was extracted from FOODPAT and TOURPAT. The score of each factor contributing to the presence of food tourism at a destination could be determined from the culinary data calculations of the main and subfields in each

category, which is reflected by the presence = 1 or absence = 0 of the component as displayed in Table 7.1 and input decisions of DMOs. The score will be based on the level of importance of the attraction status of food at a destination; all other factors were of equal importance and would be determined arithmetically.

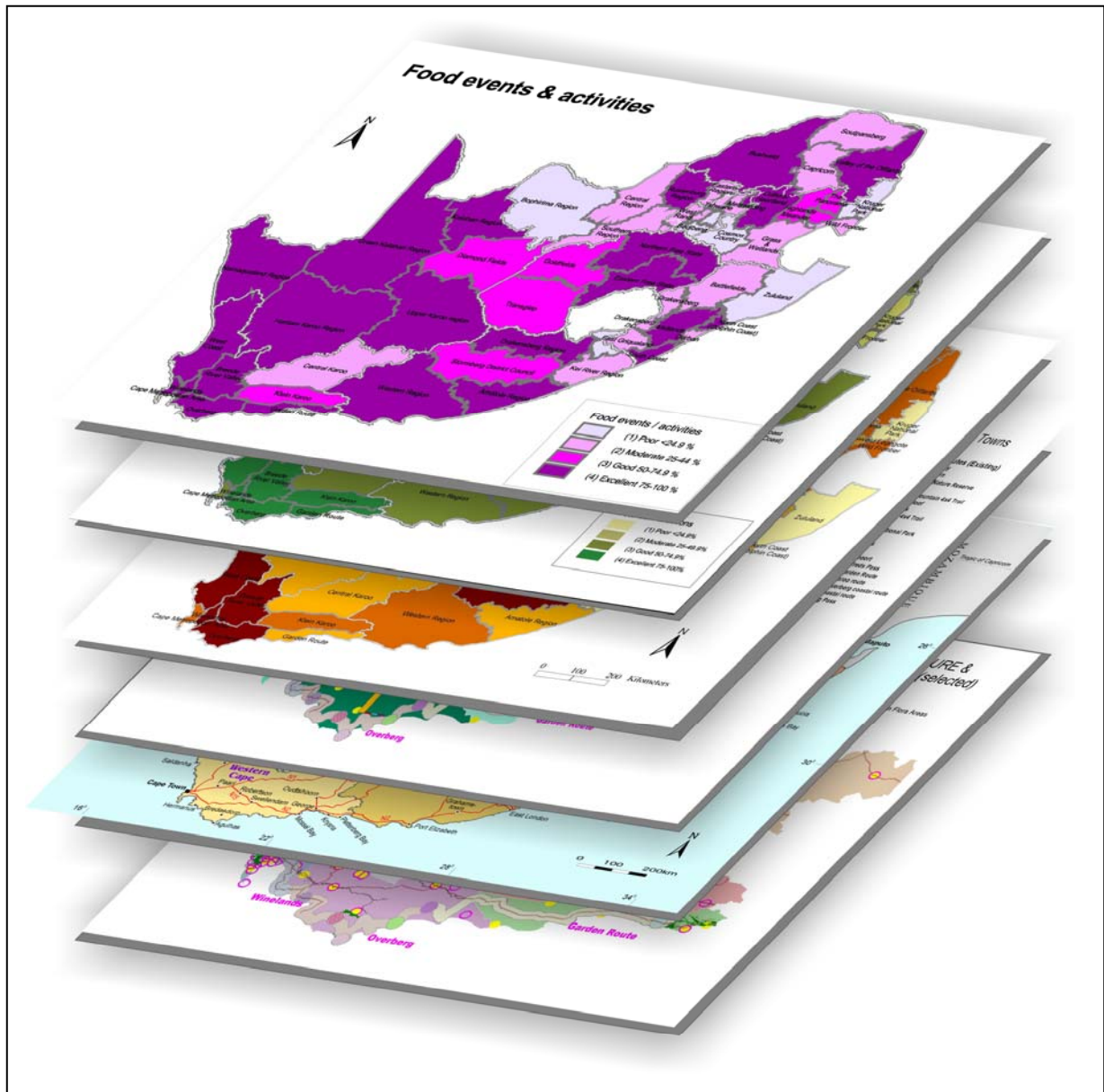


Figure 7.3: Registration of all map layers to a common coordinate system

The classification of the tourism attraction status of a destination was scored in terms of whether the attraction was classified as key [4]; supportive [3]; minimal attraction [2]; and no attraction [0]. The attribute data was scored by means of a value given to presence [1] or absence [0] at a destination. The scores were determined for each sub-field and totalled for all main fields (Table 7.1).

- Second, the attribute information was then integrated with the geographically orientated information and presented utilising simple overlays, all of equal importance, to compile thematic maps of environmental, economic and social factors. The researcher relied on the views from the expert opinion survey and international best practice analysis to reach consensus regarding the relative importance of the attributes for use in the GIS product to determine the food tourism potential at a destination. The data processing procedure transformed spatial data and non-spatial data (attributes) into a database system using ARC/INFO software. A number of steps were involved, namely:
 - *digitising (Data Input)*: Digitising was the procedure followed when the spatial data was entered into the computer (Lin *et al.*, 2002). Data in map format can be digitised directly, but the data from tables and reports have to be used to create attribute tables and only then can they be integrated with polygon maps; and
 - *overlaying maps*: the main purpose of overlays was to determine the potential for food tourism at a destination. All digitised maps (food and tourism) were overlaid with their relative attribute data to produce comparable mapping units. The total score calculated for each comparable mapping unit was the sum of the allocated scores.
- Third, all the map layers were then registered to a common co-ordinate system to present a food tourism potential map indicating the regions with a high/medium/low potential for food tourism. Nath *et al.* (2000) stress the fact that such tools and procedures should be considered as providing additional support when selecting and allocating importance to attributes. It remains important to consider the situation from all angles with GIS being one of them.

7.4.4.4 Phase four

After development of the analytical framework had been completed, locating / **identifying data sources** was the fourth phase and in this study consisted of the following:

- **Geographic data:**

A map depicting the 55 tourism regions and the nine provinces in South Africa was used as the basic image. Destination attraction status classification and simple layers of basic infrastructure, culture and tourism, food information, food attractions and food events/activities were carried out to identify the potential of food tourism in the various tourism regions and provinces in South Africa.

- **Secondary data:**

The secondary data collected for the culinary database was divided into two broad categories: food (agriculture, culinary heritage and food attractions) and tourism

(infrastructure, regional and local tourism offices, and tourism attraction mix). Each sub-category included one or more components as portrayed in Figure 7.2. Secondary data included the following:

- existing datasets – ENPAT/TOURPAT; Winelands database; Eatout database
- maps - South Africa depicting the 55 tourism regions, and the nine provinces
- thematic maps (culture/agriculture/tourism)
- census information
- tourism publications/promotional material /VEZA CD; and
- WWW – tourism websites

- **Primary data:**

Primary data was gathered by the stakeholder survey of the DMOs and the expert opinion survey that provided additional data as well as often confirming the secondary data. The surveys determined the current use of food as a destination attraction or experience and as a marketing tool by DMOs in South Africa.

Data included came from both primary and secondary sources. Gathering data is costly and time consuming, therefore locating data from existing secondary sources such as the FOODPAT and TOURPAT was beneficial when executing the strategic analysis of food tourism in a destination. Utilising such data sources where information has already been collated and organised facilitated the procedure of determining what data was required, determining the quality and relevance of the data and sourcing the required data, points suggested by Nath *et al.* (2000). As the data in TOURPAT and FOODPAT had a common geographic co-ordinate system and the features across the multiple layers are spatially synchronized, the data collection and pre-processing steps were simplified and partially executed, cutting down on the use of time and finance, recognised restrictions for DMOs and food tourism stakeholders. Furthermore the thematic map that portrays particular attributes of the geographical region and represented digitally or in hard copy is considered to be the *lingua franca* of GIS according to Nath *et al.* (2000:248). The thematic maps can be established as separate layers in the spatial database, allowing the DMOs to combine the required themes according to their own needs when determining the strategic evaluation of food tourism potential in a specific destination.

7.4.4.5 Phase five

Organising and manipulating data is the fifth phase in a GIS project and adopted in this study and the key activities are the following:

- Verification of data quality - pertains to the reliability of the thematic maps, which in the case of utilising ENPAT and TOURPAT is secure, as the source of the data quality had already been verified, was accurate and up to date.
- Data consolidation and reformatting (classification of the information) – the compilation of FOODPAT addresses the activity of classifying and consolidating the food tourism data, and the incorporation of FOODPAT into TOURPAT required that the information be compatible thus reformatting was addressed.
- Creation of proxy data (information that is derived from another data source, for which established relationships exist) – the utilisation of tourism statistics and calculations such as destinations of high touristic value which enhance and facilitate food tourism in a destination were included in this phase.
- Database construction – this key activity involved the construction of the culinary database (FOODPAT) utilising both primary and secondary data. This included known reference point information, namely the town (magisterial district), province and tourism region so as to allow georeferencing of FOODPAT and the thematic maps compiled to eventually be incorporated with TOURPAT data. This action concurs with the statement made by Nath *et al.* (2000) that the design of the database was important as it ensured that the information could be readily accessed whilst performing the strategic analysis of food tourism at a destination and that it would be available for re-use at a later stage as required by DMOs and stakeholders. Recent advances in GIS technology and database technology has allowed organisations to store raw and processed information in relational databases, allowing for seamless importation of data as required in GIS applications, but can also be applied for alternate uses.

7.4.4.6 Phase six

The analysing data and verifying outcomes phase represents the culmination of all previous efforts made to develop the analytical framework, locate the data and organise it for analysis (Nath *et al.*, 2000). All activities in this phase produce results that can be used by the DMOs and stakeholders in the strategic evaluation of food tourism in a destination. They include analytical methods to produce overlay formations, importing and exporting of data as required, computation of required statistics, the generation of output information such as the maps, tables, graphs, and, finally, they assist in the verification of the outcomes of the study. Moreover, they support the SWOT profile and are able to indicate areas with high food tourism potential.

Fieldwork that includes ground truthing is essential for the verification of the GIS. This step was covered in this study as GIS was based on crosschecking using primary and secondary data sources. The case study tested the implementability of the Strategic Food Tourism Destination Marketing Framework, which itself required assessment of the various tools and techniques in the strategic evaluation component. This execution of the case study verified and ensured the applicability of the results of the integrated datasets as explained in Chapter 5.

7.4.4.7 Phase seven

Evaluating Outputs constituted the final phase, the conclusion of a typical GIS project, which entailed a summary review of key findings and an evaluation of the degree to which the original requirements of the project had been met (Nath *et al.*, 2000). Nath *et al.* (2000:251) however point out that outputs from a GIS project are often not put to immediate use, but form a part of a larger decision-making process such as the development and implementation of food tourism at a destination. The benchmarking, monitoring and control features that have been built into the Strategic Food Tourism Destination Marketing Framework include a set of indicators to track the use of GIS information and its influences in decision-making processes regarding the planning and implementation of food tourism in a destination. Feedback from these indicators could provide support for improving GIS development and application as a decision-making support tool in food tourism planning and marketing. Active collaboration between end-users, (DMOs and stakeholders), GIS analysts and subject specialists is of prime importance for all parties to benefit from such projects and studies.

It is imperative to support the use and role of GIS as a powerful tool that can enhance the role of stakeholder participation in food tourism planning, management and marketing, and thereby extend its role to beyond being only a visualisation tool but to incorporate it in policy making and strategy development (Bahaire & Elliott-White, 1999). Access to GIS must therefore not stop at the outputs it delivers but the hardware, software and expertise it offers must be shared with stakeholders so as to contribute to sustainability and improve the competitiveness at a destination (Bahaire & Elliott-White, 1999).

7.4.5 Market Assessment and Food Attractiveness Audit

Performing a market assessment and undertaking a food attractiveness audit were the additional tools and techniques used in Step 2 to proceed with the strategic evaluation of the food tourism potential of a destination. The determination of the market positioning on a

regional, provincial, national and international level is combined with the food tourism resource and opportunity matrix in the food attractiveness audit as portrayed in Table 7.2.

This phase of Step 2 can be regarded as a type of marketing audit, which according to Heath (2002:248) could be considered as *an independent and objective appraisal of the major opportunities and problems facing the DMO*. Ritchie and Crouch (2003:250) contend that in the context of a tourism destination an audit would execute a type of examination to determine whether things are in order or not, therefore it can identify weaknesses but simultaneously determine strengths and disclose opportunities.

Market research is required to identify the current and potential target markets of the region. Furthermore product-market matching needs to be performed, with specific reference to food tourism. This can be achieved by completing the food attractiveness audit, which is an integrated product and marketing assessment. This information will provide an indication of the food tourism potential and the food tourism enhancers. The required information is usually available from reports regarding the specific region or destination and needs to be accessed to determine the market position and identify the target markets of the region. Step 1 of the Strategic Food Tourism Destination Marketing Framework, the situational analysis, included the evaluation of the environment, markets, resources and attractions to determine the feasibility of food tourism at a destination. However, in step two, the assessment regarding the markets, resources and attractions is more in depth and detailed and therefore the audit is required.

7.4.5.1 Implementing the tools and performing the assessment

The aim of implementing these tools and performing such an assessment, according to Malone Given Parsons Ltd., (2001:v), is the determination of the current competitive position in the tourism marketplace, specifically focused on food tourism in terms of:

- identifying and evaluating the food tourism resources and attributes;
- assessing the strengths and weaknesses of the destination in terms of the current attractions and market position and potential;
- identifying gaps and opportunities in the food tourism product mix; and
- identifying the food tourism development strategy in terms of marketing tasks

Table 7.2: Food Attractiveness Audit and Market Assessment (adapted from Malone Given Parsons Ltd., (2001:4)

FOOD TOURISM RESOURCE/ OPPORTUNITY MATRIX			CURRENT ATTRACTION STATUS				MARKETS					
							EXISTING			UNDERUTILIZED POTENTIAL		
FOOD TOURISM RESOURCES			Core Attractions	Supportive Attractions	On-Theme Activities	Resource under-utilized	Regional / Provincial	National	International	Regional/ Provincial	National	International
Agricultural Opportunities	Agro-tourism	Farm stays										
		Hunting										
		Fishing										
		Food picking										
		Food processing										
		Farm tours										
OTHER: specify												
Cultural opportunities	Culinary heritage / attractions	Culinary heritage										
		Ethnic cuisine										
		Traditional restaurant										
		Regional recipes										
		Cultural village										
OTHER: specify												
Food Opportunities	Events	Festivals										
	Activities	Factory visit										
	Routes	Food product										
	Food Product	Local produce										
	Restaurant	Local produce										
	Market	Local produce										
	Facilities	Food focused										
OTHER: specify												
SCORE KEY		Current attraction	Mark appropriate column with a ✓									
		Market potential	4: High	3: Moderate	2: Limited	1: Under-Utilized						

Certain information is required prior to the execution of the audit and according to Ritchie and Crouch (2003:253) comprises both desk and field research. The desk research will consist of a review, analysis and assessment of information regarding the destination, for example in this case, information as contained in TOURPAT and FOODPAT; strategies and policies; annual reports, documents; and publications by tourism organisations. The field research according to Ritchie and Crouch (2003:253) for this study would constitute identifying the stakeholders and assessing their interest and contribution toward food tourism at the destination; singling out the mechanisms in place that facilitate coordination and co-operation; identification of food tourism resources, such as events, activities and attractions and executing research activities to provide relevant information required for future audits.

Completion of the food attractiveness audit and marketing assessment matrix complements the information compiled in FOODPAT and collated in TOURPAT and is essential in the strategic evaluation of the food tourism potential at a destination. According to Malone Given Parsons Ltd., (2001:1) the food attractiveness audit and marketing assessment matrix function as:

- a tool to guide consideration of a destination's asset base and opportunities, the available food tourism resources contributing to the current market penetration and the existing and potential markets;
- an aid to identifying product gaps and opportunities for future product development; and
- a summary report.

Thus the audit and market assessment process determine the 'what is' regarding food tourism and can finally identify 'what should be', by means of identification, examination, evaluation, appraising and finally recommendation (Ritchie & Crouch, 2003).

7.4.5.2 Organisation of the food attractiveness audit and marketing assessment tool

The food tourism resource/opportunity matrix and market assessment was adapted from the tourism resource/opportunity matrix as originally developed by Heath and Wall (1992:57). Subsequently adapted by Malone Given Parsons Ltd., (2001:4) adapted this concept to describe it as organised *vertically as a series of row entries listing food tourism resource or asset types, and horizontally as a series of columns with which to express the presence, role, market performance and potential of each asset in the destination's resource mix*. The assessment made for each resource type is recorded using the key in Table 7.2. The completed matrix provides a summary of a destination's key food tourism resources and their fit with the requirements of existing and potential markets. The matrix consists of:

- A **Food Tourism Resource** column, which provides a provisional list, where the destination identifies the presence and quantity of the destination's food tourism assets or resources, grouped according to their origin, type of activity, venue or experience.
- **Opportunities** column, which group the different food tourism resources as agricultural, cultural and food opportunities, providing an inventory of the nature and role of the features, facilities, events and activities comprising the destination's resource base.
- **Current attraction status** column which is linked to the food tourism resources column as an identification of the attraction status of the opportunities listed where:
 - the **Core and Supporting Attractions** columns identify which of the resources play a significant role in motivating travel to the destination;
 - the **On-Theme Activities** column identifies the activities with links to the core attractions; and
 - the **Underutilised Resource** column identifies the resources that have not reached their potential and can be developed and implemented in the marketing of food tourism.
- **Markets assessment** columns, which records judgements as to the level of current and potential future demand for destination resources from regional/ provincial to national to international geographic markets, where:
 - the **Existing Markets** columns identify the origin markets currently visiting or using destination resources; and
 - the **Underutilised Potential Markets** columns identify which origin markets might be attracted by which destination resources, given knowledge of the attractiveness of those resources, market behaviours and visitation patterns to food tourism resources in other locations.

The execution of the food attractiveness audit and market assessment determine the availability of resources specifically for food tourism and substantiate the food tourism market share and position. A competitive analysis identifies the strengths, weaknesses, strategies and gaps of key competitors thereby determining possible branding and competitive strategies with a specific focus on food tourism for a destination developing and implementing food tourism as an attraction. Therefore performing the **food tourism attractiveness audit** could enable the destination to pursue its goals, realize its opportunities and strategies by utilising its strengths and avoiding its weaknesses specifically with regard to food tourism. The audit can therefore strategically evaluate the resources and capabilities of the destination and indicate the current functioning of its tourism operations with specific reference to food tourism.

7.4.6 Product Potential Attractiveness Tool

The execution of a **strategic evaluation of the food tourism potential** at the destination by means of TOURPAT and FOODPAT, performing a market assessment and executing an attractiveness audit, culminated in a Product Potential and Attractiveness Tool that can assist in determining the competitiveness status of food tourism in a destination.

The **Product Potential and Attractiveness Tool** (Table 7.3) is a combination of a checklist and evaluation of the perception of stakeholders regarding specified components namely key attractors; non-negotiables; enablers; value adders, facilitators and enhancers, of food tourism. The information came from the various sustainable tourism competitiveness frameworks in Chapter 4 and described in Annexure 2. The components were selected in terms of the contexts bearing on tourism and food at the destination and were acquired by analysing FOODPAT, TOURPAT, the questionnaire and the destination-marketing framework (Figure 7.2). The completion of the Product Potential and Attractiveness Tool allowed for an identification of food tourism competitiveness status of a destination by determining the potential of food tourism utilising the available data sources and evaluations, thus speeding up and simplifying the assessment process.

The Product Potential and Attractiveness Tool listed the various components and contextualised them in tourism as a resource and in food as the attraction's potential. The **Tourism** column gives the resources present and available for the development of food tourism as an attraction at a destination. The **Food** column records the potential for food tourism as an attraction at a destination. Both the tourism resources and food potential have been grouped in terms of the **Food Tourism Enhancer Components** as shown in the rows of Product Potential and Attractiveness Tool. Every resource in the tourism column is reflected by a food potential, for example key/supportive attraction in the resource column is represented by culinary attractions in the potential column, as is culture by culinary heritage and so forth.

The food tourism enhancer components and their respective resources and potential are essential for creating and sustaining a competitive destination, and they function as:

- **Key attractors** - represent the primary reasons why visitors select a destination and provide a strong attracting force and visitor satisfaction;
- **Non-negotiables** - represent the safety, security and health facilities within a destination that are critical components as far as an attraction like food is concerned;

Table 7.3: Product Potential and Attractiveness Tool

PRODUCT POTENTIAL AND ATTRACTIVENESS TOOL						
FOOD TOURISM ENHANCER COMPONENTS	TOURISM (RESOURCES)	FOOD (ATTRACTION POTENTIAL)	CURRENT STATUS			
			4	3	2	1
KEY ATTRACTORS	• Key tourism attractions	• Culinary attractions				
	• Culture	• Culinary heritage				
	• Events	• Food events				
	• Activities	• Food activities				
NON-NEGOTIABLES	• Safety / health	• Safe Food				
	• Infrastructure	• Restaurants / eating places				
	• Road network	• Accessibility to products / services				
	• Signage	• Food branding				
	• Agricultural products	• Food & drink produce & production				
VALUE ADDERS	• Routes	• Food / wine routes				
FACILITATORS	• Communication	• Food promotions / marketing				
	• DMOs	• Food strategy				
ENHANCERS	• Experience: authentic /unique	• Food specific tours				
	• Facilities / restaurants	• Utilisation local / regional products				
		SCORE				
FOOD TOURISM COMPETITIVENESS STATUS						
TOTAL SCORE			/56			

Score per component	4: EXCELLENT	3: GOOD	2: MODERATE	1: POOR
Total score	43-56	29-42	15-28	1-14

- **Enablers** - provide the foundation upon which a successful food tourism industry can be developed, such as accessibility, infrastructure, signage and the relevant products such as local and regional foods;
- **Value-adders** - contribute to enhancing the competitiveness of the destination and in terms of food tourism would include additional resources and products that provide opportunities to on-theme food tourism as an additional destination attraction;
- **Facilitators** - comprise a foundation of services and facilities that determine the perceived quality and value of a destination; and
- **Enhancers** - constitute the essential element of providing the actual experience to the visitor by means of authenticity and excellence of services and products offered, which in

terms of food tourism is imperative as it contributes to sustained destination competitiveness.

Each component is evaluated and scored in terms of the status of the component in both the areas of tourism and food where [4] equates an excellent status, [3] a good status, [2] a moderate status and [1] a poor status. The total score calculated out of a maximum of 56 and give indication of the destination's food tourism competitiveness status by determining the product potential and attractiveness of the destination in terms of food and tourism resources. The enhancement of food tourism in a destination occurs by means of the utilisation of food and tourism resources and the development and implementation of the food tourism potential via the various actions as portrayed in the key marketing tasks in the Strategic Food Tourism Destination Marketing Framework.

The Product Potential and Attractiveness Tool therefore functions as a decision-making support tool and provides information regarding the resource analysis that can assist destination marketers and current and prospective entrepreneurs, to optimise the tourism potential of local and regional foods in future destination marketing. It is this indicator that would provide DMOs and TBUs with a profile and information regarding the potential and capability to develop and implement food tourism at its destination.

The development of such a tool is one of the key goals of longer-term research on food tourism in South Africa. The Product Potential and Attractiveness Tool was tested in a selected case study, which together with the data from TOURPAT and FOODPAT, would provide concerned parties with a tool for strategy formulation and implementation and subsequently achievement of competitive and sustainable tourism at a destination. The actions required to enhance food tourism in a destination are the key marketing tasks which form the third step in the Strategic Food Tourism Destination Marketing Framework and will be discussed in the next section.

7.5 KEY DESTINATION MARKETING TASKS

The third and final step in the Strategic Food Tourism Destination Marketing Framework comprises the execution of a **series of key destination marketing tasks** and constitutes the part where food tourism will be developed and implemented in the destination marketing strategy of a specific destination. The four key marketing tasks, prioritising products and markets, positioning and branding, theming, packaging and routing and promoting were identified from the food tourism destination-marketing framework, as outlined in Chapter 4

and discussed in Chapters 2 and 3 as components of destination marketing and food tourism.

To optimize food tourism at a destination it is imperative to perform the key marketing tasks taking cognizance of the SWOT profile of the destination. The strengths of the destination and the market opportunities available need to be the focus in the strategy formulation. The weaknesses and threats present can be addressed and minimised by means of the Destination Food Tourism Strategy Approach as the situational analysis and the strategic evaluation of food tourism potential at the destination identified the available resources, food attractions and food events. In addition, the DMOs and stakeholders determined the perceived food tourism competitiveness status of the destination by assessing the specified components namely the key attractors; non-negotiables; enablers; value adders, facilitators and enhancers.

7.5.1 Prioritising Products and Markets

Information from the situational analysis and strategic evaluation of the food tourism potential was used to apply criteria for identifying, developing and implementing food tourism in a destination in terms of the key food tourism attractions and specific target markets on which to focus. To enhance food tourism it is essential that the destination complete the food attractiveness audit and market assessment, as the food tourism resource and opportunity matrix, current attraction status and market potential need to be weighed up. Furthermore, the market readiness and market matching of the attractions should also be determined by the utilisation of the tools as discussed in Step 2 of the strategic evaluation of the food tourism potential.

According to Heath (2002:91) the first step in a destination portfolio analysis is the identification of key tourism products and the allocation of resources in the destination to match the *attractiveness* of the product/experience. The Strategic Food Tourism Destination Marketing Framework facilitates this step and thus enables the DMO to assist stakeholders in deciding which products/experiences to offer and how to integrate the food tourism offering by means of on-theming with already existing tourism products/experiences. Prioritising the food tourism products provides the destination with the opportunity to use its strengths and apply them to meet the opportunities in the market environment (Heath, 2002).

Execution of Step one and two of the Strategic Food Tourism Destination Marketing Framework could lead to the identification of criteria required to develop and implement food tourism at a destination, by identifying:

- **key food tourism attractions** on which to focus;
- **market ready/not so ready food tourism attractions** that needed further development or adaption;
- **product-market matching attractions** noting which attractions would appeal to which markets; and
- **resources and attractions** available.

Thus the tools developed and used in the second step of the Strategic Food Tourism Destination Marketing Framework could uncover the presence of resources and take note of which initiatives were in place or lacking concerning the promotion and offering of food tourism as an attraction at a destination. The prioritisation of food tourism attractions and an assessment of the market could lead to the optimisation of food tourism and establishment of primary markets for the development of food tourism at a destination.

7.5.2 Positioning and Branding

Once the products were prioritised and target markets identified, a positioning strategy would have to be developed, relative to other similar food tourism attractions and experiences offered by any competitors (Heath, 2002). The steps to do effect such a positioning and branding strategy for food tourism at the destination include:

- Determination of the **type of branding strategy** to be implemented regarding food tourism. DMOs should determine whether food tourism should be part of the total branding strategy for the destination or not. Alternatively a niche branding approach could be more suitable, as food is an essential product and service required by all tourists, although not necessarily always an attraction or could broader branding such as *Proudly South African* branding be more suitable. Ultimately the decision needs to be made whether food tourism should follow a separate branding, sub-branding or package branding approach as a component of the national branding framework.
- Determination of the **positioning** of food tourism separately or as integral part of current positioning strategy of the destination.
- Determination of the **status of food tourism as an attraction** at the destination. DMOs would have to consider the possibility and viability of the elevation of food tourism to primary/core attraction or the establishment of food tourism as a secondary attraction

with on-theming opportunities. The availability of adequate resources is necessary to carry out the positioning strategy.

The purpose of positioning according to Heath (2002:130) is to create a perception or image in the visitor's mind. South Africa as a destination does not have such a distinctive character or image when compared to countries such as France or Italy especially with regard to food tourism (Heath, 2003:27). Therefore specific emphasis should be placed on developing and promoting the particular character or image of food tourism at the destination to compete effectively in the international marketplace (Heath, 2002). Branding on a local, regional and national level can provide an identity for a destination in the field of food tourism but this remains a challenge for South Africa as far as both the local and international markets are concerned. Destinations need to utilise their strengths, such as available resources, and existing attractions to develop food tourism branding through on-theming activities.

Strategic guidelines that can be followed for branding and positioning food tourism attractions and experiences at a destination can include the following:

- sub-branding of special interest experiences in a seamless and integrated manner;
- focus on the diversity and *specialness* of the food tourism experiences the destination can offer based on quality and value for money experiences;
- branding and competitive positioning of the destination should drive promotional strategies and activities focused on food tourism; and
- utilisation of an umbrella destination branding image to assist in promotion of the destination by focussing the collective attractiveness in and between destinations and adopting the principle of *co-optition* (Heath, 2002:268)).

The tools developed and used in the second step of the Strategic Food Tourism Destination Marketing Framework can provide DMOs with the necessary information required to facilitate the determination of the positioning and branding strategies, such as the identification of the resources and the status of food tourism as an attraction in a destination.

7.5.3 Theming Packaging and Routing

As food tourism can be regarded as a special interest niche product the key marketing tasks of theming, packaging and routing form an essential step for DMOs when refocusing their marketing strategies (Heath, 2002). The options should aim at enhancing the attractiveness

and contributing to the competitiveness and sustainability of the destination and these points should be considered:

- How food tourism can **enhance the attractiveness and diversification** of the destination. DMOs need to be developing an awareness of the ability of food tourism to enhance and diversify the destination. Food tourism enhancers have been identified as components of the food tourism destination-marketing framework, which was discussed in Chapter 4 and outlined in Annexure 2.
- How food tourism activities can contribute to the **competitiveness and sustainability** of the destination by making use of the Product Potential and Attractiveness Tool.
- How food tourism can be included in the total **marketing package**, by deliberating on whether it should be marketed separately, or on-themed to existing attractions and experiences.

At present a more integrated approach to product development and packaging is being followed, which is, according to Heath (2002:265), *based on an understanding of market needs, the destination's strengths, the needs of the tourism community, the public and private sectors and the destination itself*. Selling the experience is the focus of packaging the tourism product, and this includes theming and routing, without ignoring global trends and best practice (Heath, 2002).

Strategic guidelines that can be followed regarding theming, packaging and routing food tourism attractions and experiences in a destination, according to Heath (2002:265), can include the following:

- marketing **seamless experiences** is proving to be successful, food allows for this approach as according to Wolf (2002) most tourists consume food at a destination;
- following a **consumer and market driven approach**, focusing on special interest and niche product-market matches such as food tourism;
- developing products and experiences that incorporate destinations within a **broader regional context**, which is facilitated by routing and theming initiatives and allows for on-theming opportunities regarding food tourism;
- creating **synergy between the attraction base and marketing initiatives** by means of product-market matching, which is essential for food tourism to establish sustainable competitiveness for food as an attraction;
- focussing on the **uniqueness and authenticity of the destination's** food attractions and experiences, which will contribute to sustainable competitiveness in the destination;

- using **key attractions** to lure visitors and simultaneously exposing them to other tourism offerings such as **on-theming opportunities** with food tourism; and
- capitalising on **major events, conferences, festivals** and so forth to position a destination internationally and locally, which will enhance food tourism.

The tools developed and proposed used in the second step of the Strategic Food Tourism Destination Marketing Framework can provide DMOs with the necessary information required to follow an integrated approach to the theming, routing and packaging of food tourism as an experience and to apply and implement the guidelines explained in the previous paragraph.

7.5.4 Promotion

This task entails establishing the key possibilities regarding promotion of food tourism at a destination in terms of tools and techniques used, and determining the constraints and gaps regarding marketing and promotion of food in a destination. The following needed to be determined:

- How can tools and techniques be co-ordinated and combined to promote food tourism at the destination?
- Which methods can be employed to improve recognition/ identification of the destination regarding food attractions, events and activities?
- Which constraints/ gaps related to marketing and the promotion of food tourism are present at a destination?

Strategic guidelines (Heath, 2002:218) that can be followed regarding the development and evaluation of promotion strategies regarding food tourism attractions and experiences at a destination, according to, can include the following:

- coordinating destination marketing promotion between the DMOs and other stakeholders will allow for the use of a combination of methods to achieve promotion objectives of the destination with special focus on food tourism;
- striving for the use of specific themes for the destination to increase the recognition and identification of communication with the destination offering incorporating food as an attraction;
- authentic promotion with the incorporation of reviews by current tourists regarding the food tourism offerings in the destination; and

- complementing promotion with sound product, price and distribution decisions incorporating food as an attraction.

The function of promotional publicity in destination marketing strategy, according to Heath (2002:194) is to facilitate transactions by means of information that is used to persuade a tourist to visit a destination. After product-market matching has been done, promotion can make the destination offering visible. Thus completing the four tasks as outlined above will enable a destination marketer to address the issues regarding the marketing and management of food tourism in a destination.

7.5.5 Benchmarking, Monitoring and Control

The final task that DMOs will need to execute will be the activities of benchmarking, monitoring and controlling. This is necessary to determine the success of implementing food tourism in a destination and to identify where marketing and management endeavours need to be revised, adapted or replaced. Benchmarking is an essential undertaking as it determines a destination's resources and competencies in comparison with existing and potential competitors (Pearce & Robinson, 2000). The ultimate objective of benchmarking according to Pearce and Robinson (2000) is to identify best practice and therefore address weaknesses and build on strengths. Thereby producing improvement in both products and services and creating a positive effect on the performance of the destination as a whole (Kozak & Rimmington, 1998). Monitoring and control are concerned with the performance measurement of the marketing tasks, and include checking the progress of the planning and implementation and determining the success of food tourism as an attraction at a destination (Morrison, 2002).

Heath (2002:273) suggests using the following mechanisms to base benchmarking, monitoring and control processes on:

- **Statistics** of the destination. In this study, it has been shown that FOODPAT and TOURPAT which will provide information regarding the resources, products and services necessary for implementing food tourism in a destination.
- **Performance** regarding sustainable competitiveness of the destination regarding the image, safety, and success. This study recommends use of the Product Potential and Attractiveness Tool and the other tools used in the Strategic Food Tourism Destination Marketing Framework. It is noted that grading, awards and classification schemes could be useful when attempting to determine performance and classifying products and services regarding food tourism.

- **Benchmarking** against best practices and trends in terms of the execution of the key marketing tasks will determine the performance of a destination in terms of image, competitiveness, technology and branding directed at food as an attraction.
- Moving from **numbers to yield** where the focus is on monitoring benefits and impacts of destination marketing as a result of concentrating on food tourism as an attraction.

The Strategic Food Tourism Destination Marketing Framework, consisting of three major steps, provides a DMO with tools and techniques of identifying, planning and implementing food tourism at a destination, and finally assessing the performance and success of food tourism in a destination. To determine the 'implementability' of the Strategic Food Tourism Destination Marketing Framework it was necessary to apply it to a selected case study, which is discussed in Chapter 8.

7.6 CONCLUSION

This chapter has outlined and explained the compilation of the Strategic Food Tourism Destination Marketing Framework for optimal and responsible development and implementation of food tourism in destination marketing. Each step of the approach was analysed and contextualised within the goals and objectives of the study. The implementation of the Strategic Food Tourism Destination Marketing Framework in a selected case study is presented in the following chapter.