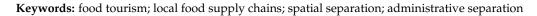*Brief Report*

To What Extent Does the Food Tourism 'Label' Enhance Local Food Supply Chains? Experiences from Southeast Wales

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Abstract: Local food emphasises destination distinctiveness as food production is a locally embedded activity. Proponents of food tourism contend that it increases local food consumption as tourists and tourism and hospitality businesses are attracted to local food supply chains, where they can buy direct from the producer, thus reducing overheads, contributing to local economies and benefitting local communities. Yet the extent to which the food tourism rhetoric enhances the local food supply chain is questionable as evidence suggests that the food tourism 'label' creates a silo, which impairs connections with local food supply chains. Seven semi-structured interviews were undertaken in Southeast Wales to explore the food tourism rhetoric, particularly the connection with local food supply chains. Three themes emerged: demand versus supply; information provision; complexity and connectivity in food tourism and local food supply chains. Ultimately, this paper challenges traditional viewpoints around food tourism being a panacea for local food producers.

Keywords: food tourism; local food supply chains; spatial separation; administrative separation

1. Introduction

The fragmentation of tourism has been a catalyst for the growth and consumption of niche tourism markets [1]. Food tourism is one such niche tourism market [2]; a subgroup of cultural tourism, with local food being an essential destination attribute because production is a locally embedded activity which emphasises cultural distinctiveness, authenticity and sense of place; thereby, facilitating competitive advantage for destinations and tourism businesses [3–10]. Local food may also be the nexus between the economic, socio-cultural and environmental capital within sustainable tourism destinations [11–14], especially as proponents contend that food tourism increases the consumption of more local food as tourists and tourism and hospitality businesses are attracted to local food supply chains, thereby supporting the local economy [15].

The popularity of food tourism as a niche tourism product can be attributed to tourist demands for heterogeneous, high-quality local food [16] and attempts to achieve destination distinctiveness in the face of increasing competition [17–19]. Research by Visit Wales identified that 76% of visitors to Wales believed that it was important for them to sample local food and drink and 75% of food producers identified 'Welsh' as the most prominent theme in their product branding, signifying the potency of Welsh provenance [20] and illustrating how local food can add value through differentiation. Food tourism can also benefit food producers as tourists and tourism businesses are attracted to short food supply chains (SFSCs) [21–24], where they can buy produce directly from the producer or through local outlets in the destination, thus reducing overheads for food producers, contributing to local economies and re-connecting food production and consumption with place [21,25]. This approach can fulfil numerous objectives, such as promoting destination development and distinctiveness through geographical connections, challenging traditional food supply

systems by facilitating connectedness and traceability, establishing governance structures and political relationships, reducing food miles, ensuring food quality, supporting the local economy and creating added value from tourism for supply chains and the local food system [26]. In addition, unlike the inseparability of other tourism products, local food does not have to be consumed at source [7]; thus, the use of food tourism as a vehicle to develop a distinctive identity can geographically increase SFSCs [21–24], whereby local food is sold to consumers outside the destination, creating food export opportunities. Therefore, although local food under the label of food tourism is a distinct demand-side tourism product, it can interconnect internal and external suppliers, 'the complex value creation network of food experiences makes it essential to link different value generators together and form coalitions and collaborations around food' [18] (p. 39).

Nevertheless, regardless of the food tourism rhetoric, some authors argue that food tourism excludes the wider role of food production in terms of economic, socio-cultural and environmental capital because it is merely a consumptive stage, which focuses on attracting food tourism markets [14,17,27,28]. This distinction between food production and consumption may be intensified by the destination-level organisation and management of food tourism initiatives from a demand-side perspective, which is disconnected from the supply side. Indeed, some [28,29] suggest that although food network initiatives seek to develop more robust networks that contribute to local economies, such initiatives are often disconnected and that food production and food tourism relationships may range from coordinated to decoupled. From a niche tourism perspective, there are issues of isolating food tourism from other products in the wider tourism destination portfolio [17], particularly if the destination does not have the ability to deliver high-quality food tourism products and services; plus neglecting aspects of the food supply chain can diminish elements of the food tourism product mix [30].

Therefore, the extent to which the food tourism rhetoric enhances the local food supply chain is questionable. There is evidence to suggest that by increasing the subdivision of tourism products [31] and creating food tourism 'labels', with the organisation and management of food tourism initiatives located within local authority tourism departments, a silo is created which actually impairs connections with local food supply chains. Indeed, whilst a plethora of literature and research exists on food tourism and food tourists from a demand perspective, less consideration has been given to the supply chain perspective in terms of how food tourism initiatives are organised, prioritised and managed in relation to local food producers. This paper draws on an exploratory qualitative study of food tourism and local food supply chains in Southeast Wales to consider the food tourism rhetoric, particularly the connection with local food supply chains, and challenges assumptions that food tourism is a panacea for local food producers.

2. Materials and Methods

This exploratory qualitative research was undertaken as part of a wider project on the Welsh Food Supply Chain sector, which was commissioned by the Welsh Government's Food Directorate. The commissioned project required a general review of the Welsh food supply chain, a food production analysis outlining food producer's capacity to meet current and future demands and a demand chain analysis of operators in the tourism and hospitality sector who use Welsh food supply chain companies, in order to develop a support programme for the food supply chain. It is from this demand chain analysis that the data for this paper are drawn. The rationale for including this qualitative study within the overall project was designed to enhance the overall project findings as little research exists on the interaction between the tourism and hospitality sector and local food producers from the perspective of the Welsh Government's Food Directorate within the context of the food supply chain. Within the Welsh Government, the responsibility for the development and promotion of the visitor economy (i.e., tourism and hospitality businesses) lies with Visit Wales, which is separate to the Food Directorate. Therefore, this qualitative study focused on food tourism in Southeast Wales to provide an overview of the

sector and the challenges tourism and hospitality operators face when engaging with local food producers, particularly in terms of promoting the local food agenda and developing short food supply chains.

Purposive sampling was used to identify an appropriate sample of tourism, hospitality and event operators who, and as part of their product offering, place a strong emphasis on Welsh food. In addition, the local authorities selected had destination-based food tourism accolades, e.g., the Food Capital of Wales award. All respondents were contacted via email initially to request their participation and to set-up an interview. Seven semi-structured interviews, lasting approximately one hour, were conducted in Southeast Wales with four tourism/hospitality/events operators (a restaurant, a vineyard and restaurant, an arts venue and a national event organiser), two local authority tourism officers (Bridgend and Monmouthshire) and one local authority rural development programme officer (Bridgend).

Semi-structured interviews were selected as the most appropriate method of gathering systematic information in order to explore the development of local food supply chains. During the interviews, respondents were asked questions which covered the role and importance of Welsh food in their product offering, their involvement in food tourism initiatives, the challenges in sourcing and maintaining the supply and quality of the food and their levels of interaction with small-scale or artisan food producers. In qualitative studies of this nature, one interview is purported to be sufficient [32]; hence, seven interviews were deemed to be adequate for this exploratory study. Research ethics approval for the overall project was obtained from the University's School Research Ethics Committee. The inductive approach enabled the data to be gathered and analysed thematically to look for patterns in the data across the respondents. Three themes emerged: demand versus supply, information provision and complexity and connectivity in food tourism and local food supply chains. It is not the intention of this paper to generalise from these exploratory findings, but to develop insights that might enhance understanding of the food tourism rhetoric in Southeast Wales, in particular the connection with local food supply chains and the widespread belief that food tourism is a panacea for local food producers.

3. Results and Discussion

3.1. Demand versus Supply

Whilst, as a niche market, food tourism is imperative to satisfy tourism demand, from a supply-side perspective, it is questionable as to whether it enhances the local food supply chain despite the increasing proclivity of tourists to source local food. Understandably, developing local food supply chains is challenging [24,33,34], often because of the small size and location of local food producers, stakeholder engagement difficulties and geographical isolation, particularly in rural areas. One restaurant owner noted that: '*the hardest thing is it's not always possible to use fully Welsh,* [as], *what we have here in Wales doesn't always support the demands of what we're trying to achieve. So as much as you want to use Welsh produce all the time, it's not always possible*'. However, the 2013 Food and Drink Producers Survey [35] recorded that less than half of the 300 food businesses surveyed are current suppliers to the tourism sector, with 6% finding tourism and hospitality a 'difficult market' to operate in and over one-third have not considered potential in the tourism sector, often on the basis that it is a difficult market to penetrate because of the high incidence of geographically-dispersed tourism and hospitality microbusinesses. Indeed, the fragmentation of this sector is exacerbated by the dominance of independent tourism and hospitality businesses, which create local food supply chain challenges [36]. One tourism officer acknowledged '*the costs of local food supply, especially in a rural area are high, because you've got dispersed establishments . . . all our* [tourism and hospitality] *businesses who wanted the local produce and all our* [food] *producers are so widely dispersed*'. Yet representatives from tourism and hospitality businesses perceived reluctance on the part of local food suppliers to engage with the sector, as illustrated by the arts venue, who illustrated the difficulties which exist between the demand and supply sides in relation to tourism and hospitality procurement of local produce: '*A Welsh flour producer . . . I go through 50-60 kilos of flour a week. I'm trying*

to get in touch with them, no answer, no reply, so I think 'are you mad?' So I might buy some of their produce through another supplier. It costs me more money. But I could pay them, I could be giving them direct business . . . I find that small-scale Welsh producers, it's like trying to break down a brick wall. They don't reply and I am spending over a million pounds a year on food. It's a lot of money to throw people's way'.

In addition, whilst local authority food tourism initiatives sit within demand-side, experience-focused tourism departments; the responsibility for local food producers is generally located in supply side-focused rural development programmes—with often little communication between the two sides. Evidence shows some positive local food initiatives via European Union-funded Rural Development Programme (RDP) funding. For example, in Bridgend, to ensure that local pubs, restaurants and tourist accommodation understand the value of local sourcing and food provenance, a 'reach4food' directory was launched, listing local food producers. The focus of their RDP programme is on increasing cooperation and collaboration so that local businesses can trade more easily across the region and achieve improved economies of scale, as explained by their RDP officer: *'for it* [food supply project] *to really work we need to be working with other local authorities together on this and sort of bring in more sort of clusters of producers so being able to better supply..'.* The project, *'Resilient Economy—local supply chains. RDP co-operation and supply chain development'* involves 11 local authorities in an attempt to create clusters and cooperatives of food producers so that small businesses are in a position to tender for larger contracts. Similarly, Abergavenny in Monmouthshire is part of the EU-funded AGRI-URBAN initiative that aims to develop examples of good practice in agri-food production and increase the number of employment opportunities in agricultural areas through developing agri-food crafts, processing, catering and specialist restaurants. The emphasis is on developing policies to shorten distribution chains and desired outcomes include the creation of credit unions, crowd funding, producer associations and training for farmers. Interestingly, whilst these are both positive local food supply chain initiatives, neither included a demand-side perspective in terms of working with local tourism departments.

3.2. Information Provision

Although previous research [37] (p.804) identified that Wales 'has united food and tourism under the same umbrella, promoting a unified voice that reaches across the country and to every tourist seeking information about Wales', this research found that whilst the number of support agencies in Wales is encouraging and may deliver coherent demand-side information, the sheer number of agencies causes confusion amongst the supply side, e.g., 'Drinks Wales', 'Meat Promotion Wales', 'Eat Welsh Lamb', 'Eat Welsh Beef', 'Total Food Marketing', and 'Horticulture Wales'. Furthermore, the Welsh Government's business development programme supports the food sector through a 'Cluster Programme' to amass food and drink companies alongside the Food and Drink Wales Industry Board, which supports food producers by providing finance, technical, business, and research advice. Accordingly, supply-side information for food producers is confusing, as acknowledged by one local authority tourism officer: 'When we started to look there seemed to be so many things happening and then not everything seems to happen, you think, well, how does that fit with that? There's stuff within food tourism and then there's the food industry in that department. You think, that's confusing from our perspective, so if you think about that from the local producers or local tourism/hospitality industry, they don't really have time for looking and searching, it's . . . a real minefield'. The situation is further complicated because many of these food sector support agencies only exist for a limited period of time, often reliant on time-constrained grants and a similar situation exists with food tourism initiatives as noted by one local authority tourism officer: 'This [funding] has been the problem with supporting food tourism and taking it forward. You get a project going, it gets established, starts going somewhere and funding is pulled and then you are starting again from scratch'.

Indeed, this confusing approach is at odds with effective supply chain management, which requires an integrated flow of information and co-ordination across all partners from beginning to end user to ensure visibility, flexibility, maintainability and competitive advantage [38,39]. This, coupled with the intrinsic vulnerability of local food chains, means that the tourism and hospitality sector still faces obstacles when trying to access local food supply chains, as illustrated by a restaurant owner: '*It's a nightmare! We've got separate suppliers for different animals, we get them from different places. Loads of work, loads of effort going down the market in the morning. Every week it's an effort . . . we are having to check it* [orders] *all the time and then I send it back, have an argument and change suppliers. That happens often because they claim there's not enough supply.* The same is true for the local food producers, who often lack points of contact and the business and sales skills required to interact with potential customers, as illustrated by the RDP Officer '*Another thing is a lot of food producers drop out of farmers' markets once they actually come to selling their own produce . . . they lose all confidence and can't do it . . . even though, up to that point, they've had every confidence in what they've produced, as soon as they've got to stand there . . . it's a different story*'. This finding supports previous research [40] which also found that diversification and customer interaction required a very different set of business attitudes and skills, compared to simply producing local produce.

3.3. Complexity and Connectivity between Food Tourism and Local Food Supply Chains

Whilst the complexity of international tourism supply chains is renowned [41]; this research illustrates that this complexity exists even within local authorities responsible for 'small' destinations, as noted by one respondent '*the small farms are so spaced out . . . it's hard to find . . . when you get down to West Wales it's so remote, trying to get them as suppliers . . .* '. Hence, although the destination is small in terms of area, rural topography creates logistical challenges and sense of distance. A lack of communication does little to enhance the connection between food tourism and local food supply chains in Southeast Wales; indeed, it supports the argument that the food tourism label creates a silo, which creates more fragmentation and disjointed activities [31,36], as illustrated by one restaurant owner '*every week it's an effort with some of the Welsh farmers or the Welsh suppliers. So, we are having to check it* [supplies] *all the time and then I send it back, have an argument and change suppliers*'. Similarly, a tourism officer acknowledged that '*suppliers couldn't guarantee the quantities required and couldn't guarantee consistent supply because of seasonality and all sorts of things, so it is a logistical nightmare and chefs have got to be incredibly dedicated to actually care enough to do it . . . But it isn't an easy thing to do . . . That's part of the problem really*'.

Therefore, whilst food tourism is increasingly popular from the demand side, fuelled by increasing awareness of food and drink traceability, as local communities and tourists seek to understand and appreciate the origin of their food and drink, this is juxtaposed by the supply side, which seems to be separated from rather than connected to food tourism. Indeed, within Welsh Government, the Food Directorate is separate to Visit Wales and the same is true at a local authority level, with food producers aligned with rural development departments, which are separate to tourism departments. As such, this fails to appreciate that '*using food and tourism for regional and economic development is not really about attracting more tourists per se, but about attracting tourists that spend in such a way that money circulates longer in the regional economy*' [42] (p.58); illustrating the complex inter-relationship between food production and tourism consumption which has the potential to enhance local food supply chains, ultimately, benefitting the destination [17,27,29]. One tourism officer acknowledged the need to work with others, outside the local authority '*yeah, there's needed that critical mass really of producers, we've thought that for a long time . . . we need to be working with other local authorities together on this and sort of bring in more sort of clusters of producers so being able to better supply*'. It is critical to address this, not least because food is a strategic component in defining destination brand and image, but also because of the potential to create local food economies through wider links to agriculture, procurement, provenance, short supply chain development, catering skills and education.

4. Conclusions

Due to the prevalent topography in rural areas and spatial separation [43], it is difficult for producers to combine produce (which can be prone to climatic fluctuations), to provide consistent supplies of local food in sufficient quantities to satisfy tourism and hospitality demand. Thus, potential economies of scale in relation to distribution are missed and food miles may be higher for local food sourced through secondary suppliers. The focus on the demand side and the provision of food tourism information for tourists has inadvertently created confusion for the supply side in terms of support and marketing agencies and a lack of information on tourism and hospitality businesses who may wish to engage directly with local producers. This is exacerbated by the administrative separation [43] between tourism agencies/departments and rural development agencies/departments at a local level. Such a lack of social capital [29,37] within destinations is further complicated by short-term project funding, the vulnerability of tourism and hospitality microbusinesses and food supply chains, as well as gaps in business skills amongst local food producers.

From a critical tourism perspective, the danger is that by specifying food tourism as a distinct product, it implies that the label will benefit local food supply chains in the destination—often in an economic sense; yet, in reality, it may deliver very little from the supply-side perspective, especially when food tourism is not integrated, prioritised or adequately funded. In such instances, the true value of local food supply chains and food tourism initiatives needs to be re-examined; especially if produce is being imported to local areas and if unreliable supplies of local produce create obstacles. The silo approach does little to enhance interrelationships and generate added value within the destination; in fact, it divides rather than connects supply and demand. Accordingly, whilst food tourism is a niche product, reinforcement and connection with local food supply chains should be part of a wider movement to create sustainable food tourism by creating linkages with other suppliers and economic sectors within the destination, in order to develop destination networks and harness intangible assets in the destination [29,42]. This is also aligned with the need for local food producers to be connected to effective food production systems with the ability to respond to market demand. Ultimately, '*food experiences should enhance both the rural destination's tourism appeal and distinctiveness and the local food production chain*' [10] (p. 1192).

In order to develop successful food tourism which is connected to local food supply chains and delivers wider benefits for the destination, local authorities in Southeast Wales need to consider the organisation, management, interrelationship and communication between food tourism initiatives and local food supply chain initiatives; otherwise, food tourism will be labelled as a separate niche activity which isolates food consumption from food production. Indeed, whilst the Welsh Government [19,20] identifies tourism as a vitally important sector, with food tourism having the potential to drive high-value tourism, it admits that more needs to be done '*to support partnership and collaborative working between food and tourism businesses*' [20] (p.25), a message reiterated in recent action plans from both the Food Directorate [44] and Visit Wales [19] in relation to the need for greater collaboration with relevant stakeholders across the food, tourism and hospitality sectors.

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