

Gwell Cysylltiadau Busnes Organig



Better Organic Business Links

An Organic Centre Wales project

Developing the markets for organic food in the Welsh hospitality and tourism sector

A review of the literature

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Better Organic Business Links – Gwell Cysylltiadau Busnes Organig

The Organic Centre Wales has received £2 million funding through the Rural Development Plan for Wales 2007-2013, which is funded by the Welsh Assembly Government and the European Agricultural Fund for Rural Development, to run the Better Organic Business Links (BOBL) project over 3 years (2009-2012). The BOBL project is designed to support the primary producer in Wales and grow the market for Welsh organic produce in a sustainable way. The project will develop new, emerging and existing markets for organic produce whilst driving innovation, at all levels, within the supply chain. It will strive to increase the consumer demand and markets for organic produce, especially in the home market whilst also ensuring that the primary producers are aware of market demands. The project will provide valuable market information to primary producers and the organic sector in general.

Delivery of the project is divided into five main areas of work:

1. Driving innovation
2. Consumer information and image development of organic food and farming in Wales
3. Market development
4. Market intelligence
5. Addressing key structural problems within the sector.

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Developing the Markets for Organic Food in the Welsh Hospitality and Tourism Sector

A review of the literature

1 Introduction

This is the first in a series of reports on 'Developing the markets for organic food in the Welsh hospitality and tourism sector' - part of Organic Centre Wales *Better Organic Business Links* (BOBL) project.

The aim is to review the available literature and to clarify the concepts of sustainable tourism, ecotourism, agritourism and food tourism and to scope the existing situation in respect of 'green' tourism accreditation schemes. This report will be followed by a study of selected organic agritourism case studies in Wales.

The specific objectives of the review as set out in the BOBL project are to,

- Review existing studies that identify the benefits of agritourism and which factors contribute to successful business performance.
- Review the Welsh Food Tourism Action Plan and identify necessary liaison activities

The approach we have taken is to examine the growth and impact of tourism and then to differentiate between the diverse responses that have been variously labeled 'sustainable tourism', 'ecotourism', 'agritourism', 'food tourism', 'green tourism' and so on.

As the involvement of organic farmers and growers in agritourism, by definition, implies a key role for food and diet, we have also reviewed the Wales Food Tourism Action Plan and identified the key elements of the plan that are directly relevant to the BOBL project.

With the development of green tourism has come the advent of specific accreditation schemes. These differ significantly from pre-existing tourism accreditation schemes which concentrate on conventional standards of accommodation and 'mod cons', by including 'green' or environmental criteria. We have therefore included a review of these schemes.

Finally, we have reviewed studies which identify the benefits of agritourism and the factors that contribute to successful business performance. This review will contribute to the next phases of this study, the examination of case studies in Wales and the survey of Wales's agritourism providers.

2 1. Sustainable tourism

2.1 Definition

Tourism which meets the needs of present tourists and host regions while protecting and enhancing opportunity for the future

Source: The World Tourism Organization (UNWTO), <http://www.unwto.org/>

2.2 Global tourism

According to the World Tourist Organisation (UNWTO), from 1950 to 2005, international tourism arrivals expanded at an annual rate of 6.5%, growing from 25 million to 806 million travelers. This development of global tourism in the second half of the twentieth century had a major impact on economies, societies and environments but as growth has continued, more concerns have been raised about the negative impacts of tourism.

According to the World Travel and Tourism Council (WTTC), after four years of growth averaging 3.6% pa, Travel & Tourism Economy GDP growth slowed to 1.0% in 2008, its weakest performance since the recessionary period¹. Looking beyond the current crisis, WTTC expect Travel & Tourism to resume its leading role in global growth.

2.3 Tourism and the UK economy

According to the WTTC, in absolute size, the UK tourism market ranks 8th in its list of 181 countries. WTTC estimate that in the UK the contribution of Travel & Tourism to Gross Domestic Product was 9.4% (£134.7 bn) in 2009. It contributed 9.6% of total employment or 1 in every 10.4 jobs. Export earnings from international visitors and tourism goods were expected to generate 11.3% of total exports (£45.4 bn) in 2009.

2.4 The development of sustainable tourism

The increase in global tourism over the past 50 years has been associated with wide ranging impacts, and the concern to ameliorate the negative impacts led to the emergence of the concept of sustainable tourism. Defined cynically by some commentators as 'limiting the number of tourists destroying what they come to see', the UNWTO links the concept to the broader ideas of sustainable development in the definition adopted by the Brundtland Commission².

Survey evidence from many countries over the past twenty years confirms that there has been a rising demand for sustainable tourism (Middleton, 1998; Scott, 1996; Stamou and Paraskevopoulos, 2003; Barbieri and Mshenga, 2008; Macagno *et al*, 2009). Policies for sustainable tourism have been adopted by the UK and Welsh governments.

2.5 Sustainable tourism policies

The UK government set out its strategy for developing and promoting a sustainable approach to tourism in *Tomorrow's Tourism* (Department of Culture Media and Sport, 1999). This promoted the adoption of sustainable development principles based on Agenda 21 in all tourism strategies, together with the need to develop a series of statistical indicators to measure progress in achieving sustainable tourism. The first set of indicators identified three core actions for the management of sustainable tourism:

- Protect and enhance the natural environment and destinations
- Support local communities and culture
- Benefit the local economies of destinations

The responsibility for developing sustainable tourism indicators in England passed to Department of Culture Media and Sport in 2003 (DCMS, 2005)

¹ http://www.wttc.org/eng/Tourism_Research/Tourism_Economic_Research/

² UNCED - The United Nations Commission on Environment and Development. The Commission's report in 1987 *Our Common Future* (known as the Brundtland Report) focused on sustainable development, defined as, "Development that meets the needs of the present without compromising the ability of future generation to meet their own needs". It contains within it two key concepts:

- The concept of needs, in particular the essential needs of the world's poor, to which overriding priority should be given.
- The idea of limitations imposed by the state of technology and future needs

2.6 Sustainable tourism in Wales

Tourism is a key economic driver in Wales. In 2006, (apart from day trips) there were 9.6 million domestic tourist trips spending £1,633 million (an average spend of £170 per trip) and there were 1.1 million overseas tourist trips spending £361 million (an average spend of £318 per trip)³. According to the Welsh Assembly Government:

“Tourism relies on the integrity of the natural environment. In Wales, beautiful landscapes and coastlines are the very foundation of tourism. Sustainable tourism is more than just being ‘green’. Unlike eco or green tourism, sustainable tourism addresses social, cultural, economic and environmental issues.

To be sustainable, tourism development needs to consider the needs and quality of life of local communities; enhance and respect culture and local traditions; contribute to local economic prosperity as well as minimising damage to the environment.”

<http://wales.gov.uk/topics/tourism/development/sustainable/?lang=en>

Over the years Wales Tourist Board and now Visit Wales and its partners have provided support to a number of initiatives to help develop tourism in a sustainable way.

The **Sustainable Tourism Framework** (see link above) outlines what sustainable development means to the tourism sector in Wales and how this will be delivered. The framework sets out Visit Wales’ key sustainable challenges as follows:

- Promoting local prosperity
- Supporting community well being and involvement
- Minimising tourism's environmental impact
- Protecting and giving value to natural heritage and culture.

Visit Wales works in partnership with a number of organizations such as,

Sustainable Tourism Forum: an opportunity for key organisations and individuals to share best practice and to advise Visit Wales and the tourism industry on issues such as climate change mitigation and adaptation. Organic Centre Wales has a representative on this Forum.

Green Sea Partnership: a cross-sector all-Wales working partnership committed to safeguarding and enhancing the coastal environment of Wales.

UK and Ireland network: brings together the UK and Ireland national tourism organisations to share and develop knowledge and to take the sustainable tourism agenda forward.

³ Data from the UK Tourism Omnibus Survey, 2006

3 Ecotourism

3.1 Definition

“Tourism that contributes to environmental conservation, supports local economies and provides recreation and environmental learning experiences”

Source: Stamou and Paraskevopoulos (2003)

According to Stamou and Paraskevopoulos (2003), the demand for ecotourism and ‘green’ experiences arose partly from a growing recognition of the environmental degradation caused by mass tourism and partly from the need to provide economic benefits for rural communities from their environmental capital. Ecotourism so defined, according to Stamou and Paraskevopoulos reconciles two traditionally opposing components of the economy, *tourism* (income and recreational activities) and *environmentalism* (conservation and environmental learning).

A variant (or polar-type) of ecotourism, is the kind of expedition-based travel exemplified by Earthwatch (http://www.earthwatch.org/europe/get_involved/). Here volunteers pay to join expeditions in return for board and accommodation plus training and experience in environmental research.

4 Agritourism

4.1 Definition

“...any practice developed on a working farm with the purpose of attracting visitors”

Source: Barbieri and Mshenga, 2008

As with ‘sustainable’ and ‘eco’ tourism there is some ambiguity about the meaning and scope of the concept of agritourism. According to Barbieri and Mshenga (2008) agritourism in the literature can be synonymous with rural or farm tourism and can therefore include a wide variety of activities.

4.2 Examples of agritourism projects

Italy: Agritourism began as an effort to stop the exodus from impoverished villages after World War II. Agriculture was previously one of the main drivers of the country's economy, but now only accounts for just 2% of GDP. A typical Italian agriturismo offers accommodation and a restaurant where most of the food is home-made or at least produced locally. About three million tourists, of whom 25% are foreign visitors, will spend holidays on Italian farms, where staying on a farm may incur a fraction of the cost of a hotel in the same village.

Slovenia: Rural tourism is popular for visitors, mainly on family farms, guests staying either with the family or elsewhere on farm; enjoying local produce or participating in farm activities. The Association of Tourist Farms was established in 1997 now has over 500 members. Grading is obligatory and assessment includes accommodation, food offer with an emphasis on typical local dishes and beverages, local folk customs, traditions and the overall attractiveness of the farm.

See also: The Development of Agri-tourism on Organic Farms in new EU countries – Poland, Estonia and Slovenia. http://www.wcmt.org.uk/reports/91_1.pdf

UK agritourism developed in the mid 70's and in 2001 it was estimated that 65% of all farm businesses were engaged in non traditional agricultural enterprises. The availability of EU grants, initially through the Objective 5b Programme encouraged numerous locally based incentives and following the foot and mouth epidemic, many initiatives promoting local food and farming were flourishing throughout the UK, one of these being:

Peak District Foods is a group of about 50 local food producers and food businesses based in and around the Peak District, all promoted in a local food guide 'Savour the Flavour of the Peak District'. They have adopted the Peak District Environmental Quality Mark (EQM), a pioneering award for businesses that contributes to the conservation and enhancement of the Peak District National Park. The aim is to forge links between four business sectors - farming, food and drink, tourist accommodation and arts. See: www.peakdistrictfoods.co.uk

5 Food tourism

5.1 Definition

Any activity that promotes high quality, distinctive, local and sustainable food experience linked to a particular place

Source: Welsh Assembly Government Food Tourism Action Plan 'Food and Drink for Wales'

Food tourism is closely linked to agritourism, and as the above list of examples shows, there is considerable overlap.

5.2 The Welsh Food Tourism Action Plan

The plan brings together agriculture, food processing, tourism destinations, the food service sector, food festivals and food retail outlets, including farmers' markets in order to capitalise on the economic benefits of providing visitors with a unique, high quality and distinctive food cultural experience. The overall aim of the Plan is to "support the competitiveness of Welsh Tourism, hospitality, food and drink businesses in a way that is economically, socially and environmentally sustainable" (p. 3)

By focusing on five key high level outcomes, WAG says that the Action Plan,

"..will help...make a positive contribution to Wales' cultural identity: Improve perceptions of Wales as a destination where high quality and distinctive food is widely available.

Provide an exceptional food experience to visitors based on locally sourced and distinctive food."
(p.3)

5.3 Key elements in the Food Tourism Action Plan relevant to the BOBL project

1. The plan focuses on how *local food procurement* and the development of *farmers' markets* can contribute to the growth of *Food Tourism* in Wales. It also refers to the need to *co-operate across traditional 'boundaries* and compartmentalised thinking' to bring together the two industries of *agriculture and tourism* to deliver the Welsh Assembly Government's strategic priorities.(p 5)
2. The strategy will continue to focus on the following strategic aims which were included in the Agri Food Strategy in Action:

- Improving market focus.
 - Improving supply chain linkages.
 - Improving the performance of processors.
 - Improving the performance of primary producers. (P.5)
3. The Plan notes that “In an increasingly competitive tourism market place, destinations are becoming more aware of the need to compete through promoting and developing what makes them distinctive and different from other destinations.” (P.5).

5.4 Examples of food tourism

Rota dos Sabores and Rota dos Vinhos do Alentejo: These two projects *The Flavour Trail* and the *Alentejo Wine Trail* (Literal translation: ‘the route of flavours’ and the ‘route of Alentejo wines’) organised by the enterprise agency, ADRAL⁴ in the Alentejo, Portugal, integrate marketing local organic and traditional products with agri-tourism. They both consist of trails which tourists follow - visiting organic producers, learning about traditional & organic production methods and their history and, of course, buying organic produce. (Organic Centre Wales 2006 <http://www.rafael-eu.com/>).

Where to Stay & Where to Eat: Organic Centre Wales has produced two guides to organic farms, authentic food and quality accommodation in Wales. They bring together organic producers offering on-farm accommodation, farmers and growers selling from the farm gate and farmers' markets, and organic farms where visitors are welcome to watch food processing or enjoy a walk along a farm trail. Farms are licensed organic and accommodation registered with the tourist boards. <http://www.organiccentrewales.org/>

Tourisme de terroir: In France, restaurants, chambres d'hôtes, wineries and cheesemakers have joined forces together with the help of the tourist board to promote the concept of tourisme de terroir. Terroir is the idea of regional individuality. The soil and connections create something unique that the tourist can taste. The tourist office provides a list of "ambassadeurs" and "adhérents", a selected group of restaurateurs and B&B owners who provide advice on the best produce in the area⁵.

Bio Hotels: The Bio-Hotels Association was founded in Austria in 2001, now with 63 members in seven countries. Of these, 35 are in Germany, 17 in Austria, five in Switzerland, four in Italy and Spain, with Ireland and France each having one. The logo “Bio-Hotel” is displayed by hotels that guarantee ‘practically everything’ their guests receive will be organic. http://www.organic-market.info/web/Organic_Hotels-Gastronomy/Bio_Hotels/318/0/0/6070.html (Accessed 12 August 2009)

⁴ Agencia de Desenvolvimento Regional do Alentejo, Evora Portugal.

⁵ Many French regions have their own Tourisme de terroir organisations which can be accessed on the web. For an English description of an example in Languedoc, see <http://www.guardian.co.uk/travel/2006/aug/19/travelfoodanddrink.restaurants.france>

6 Tourism accreditation schemes

Accreditation schemes: There is a multitude of schemes which clarify how holidays or accommodation can minimise the negative impacts and increase the positive ones on the local community and the environment. Criteria used include the following: energy efficiency, recycling, water conservation, social practices, appreciation of wildlife, building practices and purchasing policy

The following are amongst the most widely recognised accreditation schemes operating across many holiday destinations, but only the last three include mention of organic and local food:

The Green Globe Company Standard (EC3 Global) is underpinned by Earthcheck Science and operates in Asia, the Americas and Europe but only four certifications have been awarded in the UK. <http://www.ec3global.com/products-programs/green-globe>

EU Flower is an EU Eco-Label available to a range of products and services. It sets out specific ecological criteria with which products must comply to be certified as environmentally friendly as possible, including healthy nutrition and environment. <http://www.ecolabel-tourism.eu>

The Green Key originated for hotels in Denmark in France and is an international eco-label awarded to leisure organizations and hotels. It is international and supported by consumer groups, NGOs, authorities and business. See: <http://www.green-key.org/>

Green Dragon Environmental Standard is a stepped environmental management system that can help businesses to operate in a more sustainable manner. Companies and organisations receive a certificate demonstrating their achievements. <http://www.groundworkinwales.org.uk/greendragon/index.html>

ECEAT offers a high level of expertise in the field of sustainable tourism. The emphasis is on rural areas and organic farming, with over 1300 small-scale sustainable accommodation units all over Europe. <http://www.eceat.org>

The Green Tourism Business Scheme: Businesses opting to join are assessed against a rigorous set of criteria, covering energy and water efficiency, waste management, biodiversity and purchasing policy including food. It has over 1400 members across the whole of the UK. <http://www.green-business.co.uk>

Greenbox: Published in 2009 as Ireland's first Ecotourism Handbook, this guide for providers offers suggestions to environmental, community and local issues, the support of organic and artisan food producers, environmental education and the reduction of carbon footprint. <http://www.greenbox.ie/>

Visit Wales has not adopted any of these accreditation schemes, but is currently working with Visit Britain to give further recognition and marketing incentives to tourism businesses that have joined up to a recognised sustainable accreditation/certification scheme.

7 The benefits of agritourism

The organic sector has the potential to make beneficial contributions to the quality of life, the environment and sustainability in various fields beyond those derived from the standards of organic production. The development of organic agritourism can add to these contributions by linking tourism, food production and the environment; and by creating new markets for organic food and short food supply chains.

Agritourism can also benefit organic farming by providing markets in areas of low population and low consumer demand. In a study of organic farming in the National Parks of Wales, Frost and van Diepen (2007) found that many organic farms had diversified into tourism in order to safeguard income and to take advantage of marketing opportunities created by the high level of tourism in the National Park.

The RAFAEL EU Interreg project found examples throughout the EU Atlantic area where local supply chain opportunities were being achieved by linking them to tourism, conservation measures, health and public procurement. A review of the project stated that, "More practical guides for tourists to visit authentic food producers or to stay on a farm and learn more about how food is produced are needed." (Frost *et al*, 2007).

8 The performance of agritourism farms

According to Schulze *et al* (2007) a survey of farmers engaging in 'farm vacation tourism' in Lower Saxony, Germany, reveals that motives for diversification included financial reasons, but both organic and conventional farmers also had social reasons such as compatibility with guests. The researchers found that the majority of successful farmers judged their personal skills as the most important factor for success, and also that size of enterprise and economies of scale are very important. The researchers concluded that many farmers who start tourism activities to provide additional income eventually adopt it as their main economic activity and they point out that for the individual farm business it is important to network with other local businesses and organisations.

This research also revealed that visitors from the city, who choose this type of holiday as an escape, have a strong interest in seeing children learn about farm activities.

In their review of the literature on agritourism, Barbieri and Mshenga (2008) note that research has mostly focused on motives for entrepreneurial development. Whilst primarily financial, these also included social and personal motivations. Their research in the USA found that farm-owner characteristics impacted on business performance and the most significant of these were business networking, principal occupation (i.e. farming or other occupation), age, gender and race. Farm characteristics that influenced performance were length of time in business, size of farm and number of employees. The researchers conclude that the performance of agritourism farms is associated with their superior access to financial, marketing and business resources. The role of agricultural and business related networks, they argue, has important implications for extension and development agencies and policy makers who need to facilitate new and innovative channels to broaden agritourism farms access to resources.

9 Summary and conclusions

This review indicates that although there is considerable overlap between the various categories, it is possible to formulate a classification of what might generically be called 'green tourism'.

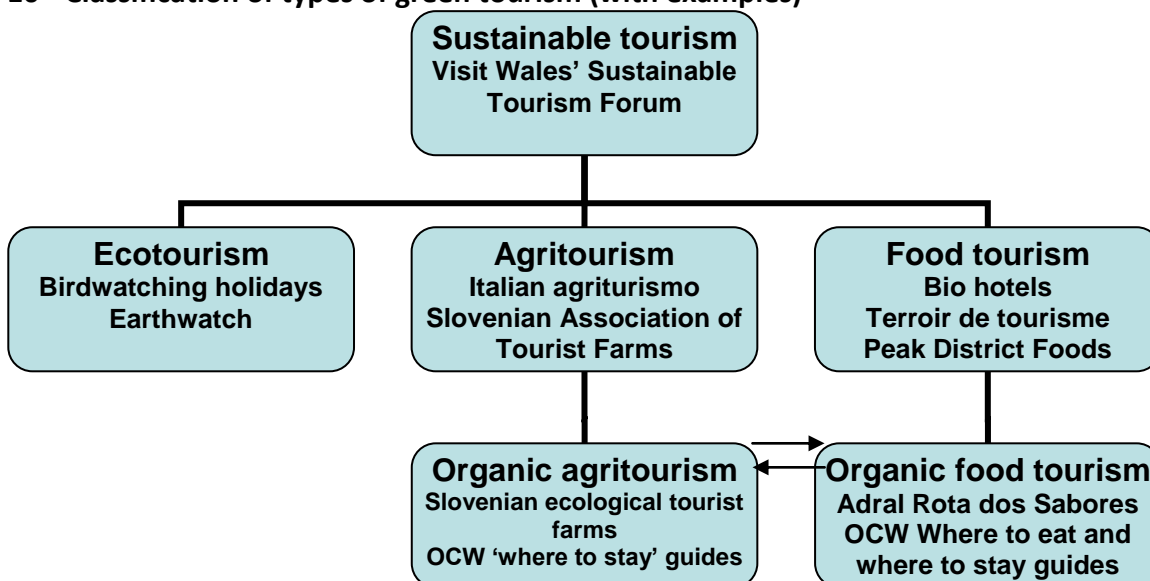
Sustainable tourism is the umbrella concept which is sustainable economically, socially and environmentally and covers a wide range of activities and locations.

Ecotourism more specifically refers to rural tourism. Here sustainability is focused on the environment and, economically and socially, on rural society and communities.

Agritourism, as a concept, is best reserved for agrarian or farm-based tourism with *agritourism on organic farms* as a separate sub-category. This is where farm-based tourism is explicitly linked to the appreciation and consumption of organic produce. It is also where the provision of accommodation embraces linked principles such as recycling of wastes, use of renewable energy, and methods of carbon reduction. It is the link to the appreciation and consumption of organic food that provides the connecting bridge to food tourism.

Food tourism includes the catering and hospitality sector, and here there is also an organic sub-category where hotels, restaurants and other caterers use organic produce (and in the ideal case) environmentally benign products and building materials, renewal forms of energy and have a low carbon-footprint.

10 Classification of types of green tourism (with examples)



Agritourism, and particularly organic agritourism, has the potential to play a role in rural development. It can add value to a farm's production, establish new markets and contribute to the development of short supply chains. More generally organic agritourism is a part of what has been called the new integrative eco-economy (Kitchen and Marsden, 2009).

This review has also highlighted the importance of local business and professional networks for the success of agritourism enterprises and the need for access to resources, especially financial and marketing. Investigation into the factors that contribute to a successful agritourism business will continue in the next phase of this BOBL project with case studies from Wales.

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