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DE L'EST**

# **Eastern Townships Culinary Tourism Development Strategy 2021-2023**



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Cover photo: Vineyard of l'Orpailleur Economusée du vigneron by Dominique Lafond





# Acknowledgements

This culinary tourism development strategy would not have been made possible without the support and contributions of Annie Langevin, Étienne Frémond and Jean-François Charest, as well as the teams at Tourism Eastern Townships, at CIBLE, at AITQ, and their partners.

We would sincerely like to thank everyone who provided us with comments and suggestions during the interview, survey and meeting stages of elaborating this strategy.

Finally, this project would not have been possible without the Tourism Industry Association of Canada and its Elevating Canadian Experiences program, delivered with the financial support of the Canadian Experiences Fund in partnership with the Government of Canada. Thank you!



The Culinary Tourism Alliance is a not-for-profit organization dedicated to bridging the gap between the food and drink and travel industries. This report was written by Martin Lacelle, Valerie Keast, Camilo Montoya-Guevera and Caroline Morrow.







Fromagerie Les Broussailles par François Poirier







# Executive summary

This report presents Tourism Eastern Townships and its partners' strategy for growing culinary tourism in the Eastern Townships region for the 2021–2023 period. This strategy follows on from the 2018–2020 Regional Strategy for Culinary Tourism and draws on its orientations and vision, but is adapted to the reality of the tourist industry in 2021. The Eastern Townships Culinary Tourism Development Strategy is the result of a collaboration between Tourism Eastern Townships and the AITQ (Alliance de l'industrie touristique du Québec) as part of a project initiated by the Tourism Industry Association of Canada to equip four (4) different regions with culinary tourism strategies. An integral part of the Elevating Canadian Experiences program, this project was funded through the Canadian Experiences Fund in partnership with the Government of Canada. The Culinary Tourism Alliance worked on the research and development phase of this strategy from October 2020 to March 2021.



This report presents the strategic orientations that Tourism Eastern Townships will implement to solidify its position as a culinary destination for the coming years (2021–2023). The Tourism Eastern Townships and CIBLE planning team identified the following objectives at the outset of the strategic development process:

- 1/** Structure distinctive culinary experiences;
- 2/** Help culinary tourism producers and enterprises improve the customer experience and develop tourism;
- 3/** Shape the Eastern Townships' reputation as a "culinary region" and diversify its promotional activities for culinary tourism;
- 4/** Strengthen the Créateurs de saveurs des Cantons-de-l'Est brand and improve culinary brand visibility;
- 5/** Collaborate proactively with territories, regional and national partners, and the tourism industry.

Primary and secondary research methods were used throughout the strategic process to identify and validate the existing orientations, including interviews with key players of the region's tourism industry, surveys with businesses, meetings with stakeholders, etc. These research methods were critical in understanding and interpreting the regional context and differentiation points, and in analyzing the strengths, weaknesses, opportunities and challenges defined herein.



# The Eastern Townships as a Culinary Destination

All tourism enterprises can distinguish themselves through a culinary component. By incorporating tasting elements to the visitor experience, businesses can promote their product while ensuring that it plays a key role in the culinary tourism value chain.

Having already earned a stellar reputation in Quebec for the quality and diversity of its agri-food products, the Eastern Townships' culinary identity is defined by its distinct culture and the wealth of products available. What's more, the region's culinary strengths are spread across varying product types, including wine, cheese, beer, local produce and culinary experiences in the municipalities which have prioritized the development of agritourism and culinary tourism in the past. By collaborating with the sector's key players—who offer a wide range of reputable solutions that can help diversify culinary tourism—Tourism Eastern Townships can play a significant role in public outreach and in developing and marketing experiences that celebrate the region's culinary identity.

The key stakeholders of the region's tourism industry define the Eastern Townships as a “culinary destination,” a definition which has been validated in neighbouring markets. However, the Eastern Township's culinary reputation is not as well known in national and international markets, meaning that the region has not yet reached “must-visit” status. Nonetheless, the agritourism and culinary industry view these markets as attainable, recognizing that the strength of the region lies in the quality of its products and the pride of its inhabitants.



With regard to strategic positioning, the Eastern Townships region can be defined by the wealth and diversity of its culinary products, by its stories, its cultures and unique customs, by its artisans' hospitality and expertise, and by its enchanting setting. This strategic position will be developed through our proposition, which is divided into three pillars of development and nine priorities, to be accomplished over the next three years:

# Pillars of Development

## Destination Marketing

- Clarify and reorient or build themed trails and/or culinary itineraries that are most likely to attract tourists and that are based on unique products or stories.
- Structure the marketing strategy and product offer to truly showcase the region's culinary identity through the flagship products that make the Eastern Townships Quebec's greatest culinary destination.

## Destination Development

- Advocate for culinary tourism and the benefits it brings to those working in the sector in order to improve the quality of the experiences on offer.
- Identify the stories, customs and practices, and the flavours that make the Eastern Townships unique, in order to define and create a clear, marketable regional culinary identity.

## Cooperation and Facilitation

- Establish and create the resources required to implement developmental priorities and bring culinary tourism products to market.
- Be an enabler and leader in strengthening the ties between the sector's collaborators who are intrinsically linked to developing culinary tourism products.









# Introduction



Manoir Hovey par Gaëlle LeRoyer, Quête des Saveurs

# Context

The Eastern Townships were selected by the Tourism Industry Association of Canada (TIAC) and the Alliance de l'industrie du tourisme du Québec (AITQ, Tourism Industry Alliance of Quebec) to collaborate with the Culinary Tourism Alliance (CTA) on a strategic development process for culinary tourism. An integral part of the Elevating Canadian Experiences program, this project was funded through the Canadian Experiences Fund in partnership with the Government of Canada. The CTA worked on the research and development phase of this strategy from October 2020 to March 2021. The Eastern Townships are one of four (4) regions selected for this project. The resulting strategy is based on a three-year implementation schedule. The insights gathered from the project will serve as the foundation for the creation of national guidelines for the development of a culinary tourism strategy for rural and remote areas, and the creation of a strategic tool developed by the CTA in the framework of this project to be used by tourist destinations across the country.



Co-produced and validated by those tasked with implementing the strategy, including Tourism Eastern Townships, this strategic process differs from those of the other regions selected for the project, as the region already had clear culinary tourism development objectives in place for 2018–2020. The CTA therefore validated and updated the existing objectives from the 2018–2020 culinary tourism strategy to ensure that said objectives reflected the present-day reality. These objectives were:

- 1/** Structure distinctive culinary experiences (with a focus on events);
- 2/** Help agri-food producers and culinary tourism enterprises improve the customer experience and develop tourism;
- 3/** Shape the Eastern Townships' reputation as a "culinary region" and diversify its promotional activities for culinary tourism;
- 4/** Strengthen the Créateurs de saveurs des Cantons-de-l'Est brand and improve culinary brand visibility;
- 5/** Collaborate proactively with territories, regional and national partners, and the tourism industry.

# Method

This strategy was developed using secondary and primary research methods targeting the business community, municipalities, and the local tourism industry, including:

**A document review and secondary analysis:** in order to gain a clear understanding of the regional context and to align this strategy to the framework already developed and the steps already taken, numerous reference documents were collected and analyzed, including regional tourism development strategies and plans (past and present), and local and provincial research and strategy reports.

**Secondary research:** secondary research was conducted based on informational websites and documents, to gain a clearer understanding of the region's social, cultural, historical and environmental context and its challenges as a culinary tourism destination.

**Interviews with key stakeholders:** a total of ten personalized interviews were conducted with the representatives of businesses (7) and organizations (3) identified by Tourism Eastern Townships as key stakeholders of culinary tourism in the region. The interviews were comprised of 11 questions and covered varied themes such as typical visitor profiles, the region's flavours, the role of the agri-food sector in the tourism industry, and the development of the sector. These interviews enabled the CTA to explore the environment in which culinary tourism is developing in the region and to inform key companies and organizations about the process of developing the culinary tourism strategy. The results of the interviews were analyzed and then used to put the finishing touches to the questions in the business surveys.



**Business surveys:** the Culinary Tourism Alliance created and deployed a survey to collect the opinions and suggestions of businesses working in (or who have an interest in working in) the Eastern Townships culinary tourism sector. The survey asked questions related to the region's current culinary tourism sector, the challenges, opportunities and the region's pull factors. The survey was shared with business between February 2 and 19, 2021, and received 101 individual responses from a diversified cross-section of companies:

- Accommodation: 45%
- Restaurant or other food services company: 27%
- Beverage producer: 22%
- Food producer/supplier: 22%
- Attractions or events: 18%
- Farmers' markets and retailers: 10%
- Other: 12%

*\*N.B.: survey participants could select more than one type of business when completing the survey; therefore there are more answers than participants.*

Answers collected from the survey have been kept anonymous for the purposes of this analysis. However, it is important to note that participants from more than 94 different municipalities completed the survey, the municipalities with the highest representation are:

- 1/ Sherbrooke (n=10)
- 2/ Magog (n=9)
- 3/ Orford (n=7)
- 4/ Bromont (n= 6)

**Meetings with stakeholders:** the CTA coordinated a virtual meeting with representatives from Tourism Eastern Townships, CIBLE and the AITQ to validate the conclusions drawn from the diagnostic report, and to create the strategic development pillars and priorities.



# Schedule

## October 2020

The CTA developed and validated the methodology and the work plan with representatives from Tourism Eastern Townships.

## November 2020

With support from Tourism Eastern Townships and key partners of the project, the CTA compiled and revised the reference documents deemed relevant.

## December 17 – January 23

Aided by the CTA, Tourism Eastern Townships identified individuals for personalized interviews. These interviews helped the team understand the environment and regional best practices for culinary tourism.

## February 2021

The business survey was released online. The survey validated the information collected during the interviews and clarified which strategic orientations of the 2018–2020 strategy should be kept, which should be amended, and which should be forgotten.

## March 16, 2021

Virtual meeting with stakeholders to analyze the strengths, weaknesses, opportunities and threats, and the main strategic orientations recommended by the CTA.

## February – March 2021

The data collected from the interviews and surveys was compiled, revised and analyzed using quantitative and qualitative methods, and then complemented through secondary research in an environmental analysis.

## March 2021

Based on the comments received and results of the stakeholder meeting and the follow-up meeting with Tourism Eastern Townships, the CTA prepared a draft strategic plan, which included specific recommendations for the area's development as a regional culinary tourism destination.

## March 26, 2021

Following revisions by Tourism Eastern Townships' representatives and partners, the 2021–2023 Culinary Tourism Development Strategy was finalized.





# The eastern townships as a culinary destination



# Regional Tourism Development Through a Place's Culinary Identity

The province of Quebec leads the pack in the development and promotion of its cultural identity through so-called culinary or gastronomic tourism. A priority pillar of development for the provincial government, tourism has become a key economic driver, showcasing the culture, language and distinct identity of Quebec. Unfortunately, the COVID-19 pandemic has had a drastic and lasting impact on the tourism industry. The pandemic has accelerated many of the trends observed in travellers, who are now increasingly looking for sustainable experiences that are close by and that they consider to be safe, and to discover new things.<sup>1</sup>

It therefore goes without saying that regional economic development is likely to go through a tourism renewal or restructuring phase, which puts businesses front and centre. Indeed, many of the action plans renewed by Quebec organizations and the provincial government have mentioned the topic as a priority for the coming years. For example, in Orientation 1 of its 2019–2023 strategic plan the MAPAQ (Ministère de l'Agriculture, des Pêches et de l'Alimentation du Québec) states its desire to enhance the “products that meet consumer needs,” and in Orientation 2, “support companies in the development of their prosperity and sustainability.”

<sup>1</sup> Livre blanc Tourisme 2021 : entre défis et occasions d'affaires (2021 Tourism White Paper: Between Challenges and Business Opportunities), Réseau de veille en tourisme

The AATGQ (Association de l'agrotourisme et du tourisme gourmand du Québec) defines culinary tourism as the “discovery of a region, by tourists or excursionists, through agritourism activities, which are complementary to agriculture or the bio-food sector, and through distinct culinary experiences, which showcase the expertise of local agricultural producers and artisans, and which enable them to discover regional products and dishes typical of the province, through the welcome and information provided by their host.”<sup>2</sup> The Terroirs et saveurs' (AATGQ) 2020–2023 provincial action plan also leans towards the development of experiences to better respond to the market trends identified above, including two priorities that are intended to:

- Strengthen Quebec's position and promote the province as a world-class culinary destination.
- Optimize the coexistence and complementarity of Quebec's brand for the sector and regional culinary tourism brands.

Culinary tourism has been a component of regional tourism development in the Eastern Townships for decades. As one of Canada's most progressive regions with regard to the development of culinary tourism markets, organizations working in the tourism sector have stood up to ensure that culinary tourism is recognized as one of the strengths of the Eastern Townships, through the abundance, variety, and renowned quality of its food and beverage products (e.g. Brome Lake Ducks, well-known cheese makers and orchards, and, of course, the region's wines and well-established vineyards).

<sup>2</sup> Plan d'action provincial 2020–23 sur l'avenir du tourisme gourmand au Québec (2020–2023 Regional Action Plan for the Future of Culinary Tourism in Quebec), AATGQ.



These strengths have been repeatedly identified in the strategies and findings of regional organizations working in the development and promotion of the tourism sector, including in the 2018–2021 Créateurs de saveurs marketing plan (CIBLE), which identifies one of the industry’s strengths in relation to culinary tourism: “We are witnessing the emergence of an increasing number of agritourism projects with high-value added.” <sup>3</sup>

Tourism Eastern Townships and its partners have identified culinary products (and the development thereof) as a key vehicle of its unique value proposition that sets it apart from other regions of Quebec and Canada. Culinary tourism was identified as a key pillar for development in its 2018–2022 strategic plan:

- Orientation 1.2 : “Establish conditions to make the Eastern Townships an innovative and acknowledged culinary destination: TOURISM EASTERN TOWNSHIPS will continue to pave the way in making the Eastern Townships a recognized culinary destination, both across Quebec and internationally. To do so, we must ensure that the main products and services stand out through the creation of original and memorable tourism experiences. Linking together attractions, activities and events, and promoting culinary brands will be at the heart of the strategies we implement.” <sup>4</sup>

<sup>3</sup> Plan de marketing, Créateurs de saveurs 2018–21 (2018–2021 Créateurs de saveurs Marketing Plan)

<sup>4</sup> Plan stratégique de Tourisme Cantons-de-l’Est, 2018–2022 (2018–2021 Tourism Eastern Townships Strategic Plan)





Léon Courville, vigneron par Daphné Caron



# Brand Images

The level of regional interest for agri-food and culinary products has doubtless been influenced by the Eastern Townships' well-established brand images and designations. Brands such as Créateurs de saveurs, themed trails (including the Wine Country Trail), Cafés du village and Cœurs villageois have undoubtedly played a role in diversifying and drumming up interest for local agri-food products. However, as there are several well-established brands in the region, this analysis aimed at gaining a deeper understanding of their perception by the business community as an added value for their company. The survey for businesses demonstrated that **over half of the participants** (55%, n=51) are associated with one or more recognized food product or tourism promotion brands, but that **45% of participants** could benefit from some level of clarification about regional brands in order to better understand their advantages and participate with them more actively.

According to the survey, the three following regional brands attract so-called **tourism customers** the best:

- 1/ Themed trails** (e.g. Wine Country, Brasseurs des Cantons, Townships Trial, Summit Drive) (72%)
- 2/ Local or regional destinations** (e.g. Sherbrooke, Brome-Missisquoi, Haute-Yamaska, Sutton) (38%)
- 3/ Créateurs de saveurs** (36%)





Laiterie de Coaticook par Sébastien Larose

When asked which of these brands attracted the highest number of local customers, we received similar answers. However the distribution changed:

- 1/ Themed trails** (e.g. Wine Country, Brasseurs des Cantons, Townships Trial, Summit Drive) (46%)
- 2/ Local or regional destinations brands** (e.g. Destination Sherbrooke, Tourisme Brome-Missisquoi, Haute-Yamaska, Sutton) (34%)
- 3/ Créateurs de saveurs** (27%)

The only other brand selected (Cafés du village) was identified by 10% of participants. Seven percent of participants selected “None of these brands.” The trend of a higher appreciation for themed trails than product awareness branding was also confirmed in the interviews. Many of the interviewees mentioned that the business/product brand or local destination brand (e.g. Sutton, Brome, Coaticook) attracted more customers than a regional designation brand or larger destination brand.

# The Region's Products and Flavours

As indicated above, the Eastern Townships are renowned for the diversity and quality of their local products. Often seen as a complement to a tourist's itinerary, local food has gradually become a calling card in itself, attracting a different clientele to the outdoor recreation enthusiasts the region is used to welcoming.

**An overwhelming majority of survey participants (87%) felt that local food and beverages were of "great importance"** in the overall visitor experience of their company (or destination in the case of destination promoters). Only 10% of participants did not offer local food or beverages, which seems to indicate that local food and beverages are well represented in tourism experiences in the Eastern Townships.

When asked to identify a specific product that helps set the region apart, the industry representatives interviewed could not differentiate between the region's typical products and flavours and those of other regions of Quebec. However, many mentioned the quality, volume and variety of products available, but these products (and their quality) were inconsistent from one company to the next.

Incidentally, this trend of a diversified offer was also noted in the survey. We asked the participants who offer local products in their visitor experience to name the five most popular products with their tourism clients. The products most often identified included:

- 1/** Wine (n=33)
- 2/** Cheese (n=25)
- 3/** Beer (n=19)
- 4/** Honey (n=15)
- 5/** Maple products (incl. maple syrup) (n=12)

Other products identified included duck (e.g. Brome Lake Ducks) (n=10), seasonal fruits (e.g. apples, berries, incl. fruit drinks) (n=9), and vegetables (n=9).

Industry stakeholders and the survey revealed a flagship product that sets the region apart, but that is not necessarily representative of the majority of the region's food/beverage producers and processors: wine. Local vineyards are iconic of the Eastern Townships, aided by the Wine Country Trail, which includes member-businesses with strong, powerful brands. Visitors can therefore easily recognize them and travel along the trail, building their own itinerary (people like to taste renowned products at their site of production). The survey confirmed this, with participants identifying visits to vineyards and wine tasting (n=30) as the most "memorable" type of experience for those visiting the region for the first time, this was followed by visits to cheese makers and cheese tasting (n=24) and the Wine Country Trail (n=16). Other culinary experiences identified included visits to craft breweries (n=13) and local restaurants (n=11).



The key stakeholders interviewed indicated that some culinary products in the Eastern Townships are simply unavoidable. These businesses included Brome Lake Ducks, cheese from the Abbaye Saint-Benoît-du-Lac and from La Station, the Bleu Lavande lavender fields, the Coaticook dairy, and apple pies from Gros Pierre, to name just a few.

The concept of a regional or local flavour is dependant on the quality of the product and its backstory. Experiences are only memorable when all five of a tourist's senses are stimulated, not just their taste buds. Storytelling is therefore an integral part of any great experience; it helps customers get to know the area and plunges them into the history and culture of the company or place.

Although the stakeholders interviewed and the businesses surveyed identified the region's flagship products, they were unable to pinpoint the reason why these products are unique and identifiable to the region. Businesses in the Eastern Townships did not struggle to name quality products, but they could not necessarily indicate a specific reason why a visitor would travel to the region to sample the product, nor what makes the region unique and interesting in terms of its traditions, customs and practices — aspects which are non-negligible in any great visitor experience.



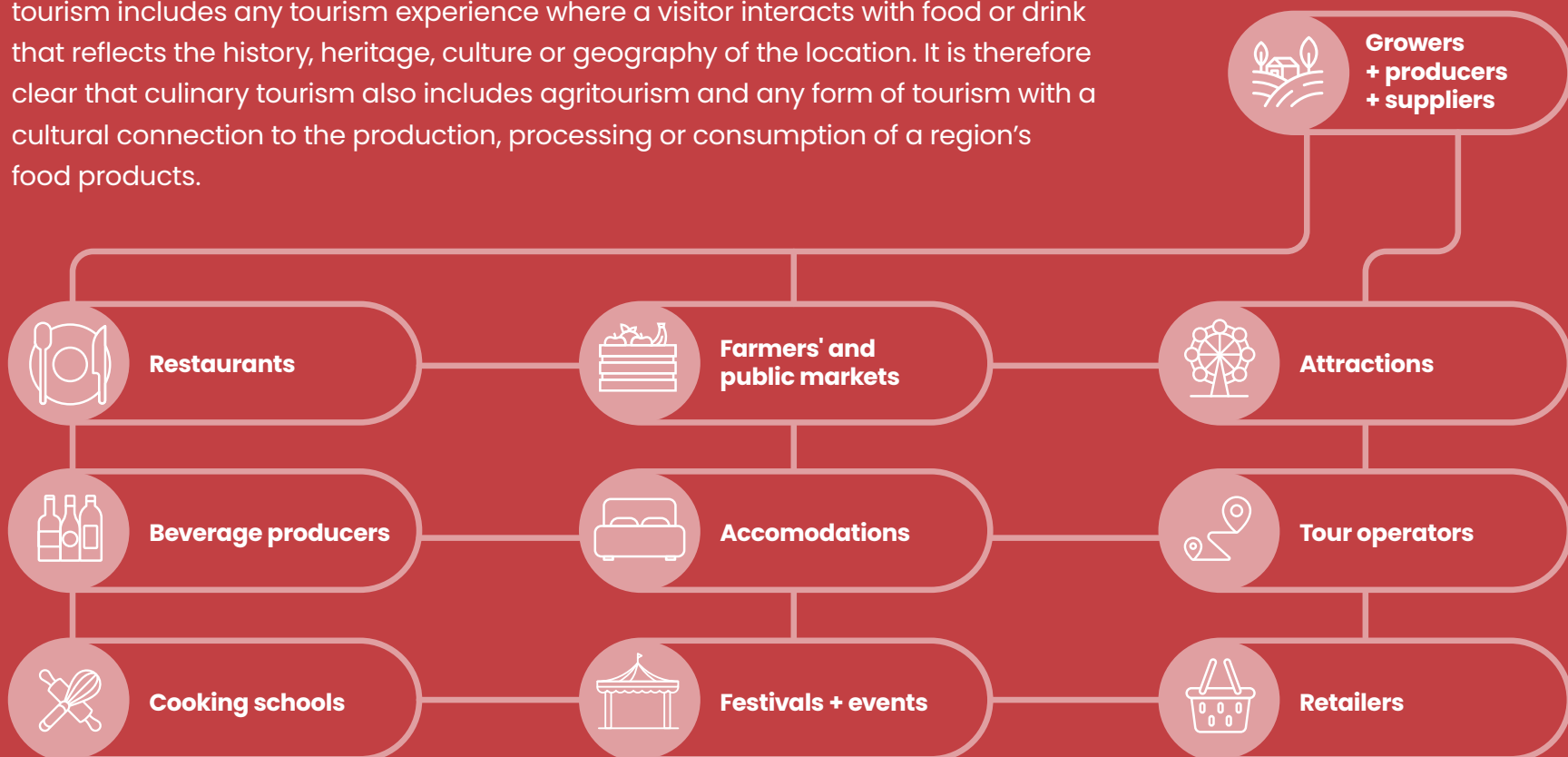




# The Eastern Townships Culinary Tourism Value Chain

© Culinary Tourism Alliance

The World Tourism Organization (UNWTO) states that culinary and/or gastronomic tourism includes any tourism experience where a visitor interacts with food or drink that reflects the history, heritage, culture or geography of the location. It is therefore clear that culinary tourism also includes agritourism and any form of tourism with a cultural connection to the production, processing or consumption of a region's food products.





Thus, it is evident that a region's culinary tourism value chain can provide a wide range of opportunities from experiences to interactions with the various sectors' stakeholders and partners, all of whom benefit from the varied and significant local food products. The culinary tourism value chain also reveals the relationships that need to be built and maintained so that a region can distinguish itself as a unique, culinary destination. In order for all those involved in the value chain to recognize the value they bring to the table, they must first be made aware of the opportunities and advantages of this type of network.

Compared to other similar destinations around the country, the Eastern Townships boast many organizations and associations that support (or would support) a value chain-type network. With its RCMs, municipal economic and/or tourism development services, agri-food associations (such as CIBLE) and destination management associations, the region is well represented by key players dedicated to promoting and developing the culinary tourism value chain.

Yet despite its well-established infrastructure, the region still faces some daunting challenges. The personalized interviews revealed that many participants feel they do not have the right tools to adequately meet market needs. With access to a whole host of services, experts and support organizations, you would be forgiven for thinking that tourism enterprises feel well equipped for these purposes. Yet on the contrary, there seems to be a lack of structure, which may be due to many factors, perhaps the most significant being the communications structure. Almost all the representatives of tourism enterprises stated that the abundance of information shared by said organizations has the adverse effect of over-saturating the receiver (often small and medium-sized enterprises with limited resources and time).

The issue of inter-organization structured communication is also reflected in the local food supply chain. Retailers, processors and producers all indicated during interviews that the biggest obstacles to providing quality, designated regional experiences were related to consumer product accessibility. Comments to this effect varied from the access to regional products to reasonable pricing, the access to local distribution services (in particular from suppliers to restaurants/retailers), in-season and off-season product availability and menus that do not always reflect seasonal realities, access to a qualified workforce, a lack of adaptation from businesses to respond to the needs of the tourism market (e.g. opening hours, seasonality), and the lack of cooperation between businesses in the sector. In order to validate and prioritize these challenges, the CTA included a question specifically about this in the business survey. When asked what they felt were the three biggest challenges faced by companies when developing/supporting distinct culinary tourism experiences, participants responded:

- 1/** The promotion of companies as a culinary tourism experience (66%, n=54)
- 2/** The availability of a qualified workforce during the tourism season (57%, n=47)
- 3/** Access to an adequate volume of local, high-quality products to meet customer demand (39%, n=32)
- 4/** Access to a local distribution system (e.g. transport, refrigeration) for local products (33%, n=27).



Produits régionaux par Daphné Caron

It must, however, be noted that participants have shown a significant willingness to actively participate in resolving these fundamental issues. Each company, organization and stakeholder shared their desire to find solutions and play an active role in establishing solutions to help drive the region's development as a must-visit Canadian culinary tourism destination. Often more actively involved and interested in local initiatives (those located close to home) many companies suggested that business support solutions and opportunities should be first initiated locally, following the business and experience development criteria implemented by the region. This direction also reflects the best practices of regional tourism development, which encourages the development of initiatives that structure tourism locally, aided by regional or provincial experts and solutions.







# Culinary Tourism Customers

The findings from the meetings and interviews suggest that an increased interest in local and sustainable food has enabled the Eastern Townships to carve out its place as a culinary destination. With scenic vistas and an obvious appeal to visitors from the neighbouring regions and the province's urban centres, the varied and high-quality culinary products available in the Eastern Townships are a wonderful addition to the region's established tourism offer. Local and innovative, the Eastern Township's agri-food products are renowned for their quality and variety. Regional tourism is therefore well established on the provincial market and is now looking to make a name for itself in new markets in both Canada and the United States. Thus, it is important that the key players have a deep understanding of the tourism markets interested in agritourism and culinary tourism experiences, i.e. foodie tourists and "food connected consumers."

"Food connected consumers" is a growing market segment not only in the culinary tourism market, but in the tourism market as a whole. This segment goes beyond the typical characteristics of a "foodie" by self-defining as having an average or above-average passion for food and being interested in food-related issues. Often particularly interested in distinct, local flavours, this segment is notable for its conscious decision-making and openness to new trends and/or unique flavours. In Canada, and more specifically in Quebec, this trend can be observed in the media (e.g. television and online series about mindful eating and consumption), in grocery stores and food distribution services, and of course, in enterprises offering distinct culinary tourism experiences.

The millennial and gen Z segments attach a particular importance to food. According to F&Co, they are twice as likely to plan a trip based on the food and restaurants available in their chosen destination. Just like so-called sustainable tourism, planning travel itineraries around food and drink is becoming increasingly popular with consumers wanting to take part in unique and memorable culinary experiences. What's more, so-called package tourists who are also looking to get to know their destination's culture are increasingly adding activities and experiences related to discovering local, unique food products to their vacation itineraries. Finally, think about people visiting friends or relatives or attending congresses and events, and who want to add excursions or activities to their stay in a particular place.



Cidrie Milton par Antoine Petrecca



With its panoply of distinctly local, high-quality products and activities, the Eastern Townships would benefit from further developing its culinary tourism offer to capitalize on the increasing trend for relaxed culinary activities and culinary tourism experiences. In 2014, a survey by Tourism Eastern Townships revealed a list of consumer interests in the region<sup>5</sup>:

- 63.9% are “very interested” in eating in a restaurant which celebrates local products;
- 61.6% in buying local products from a bakery, cheese store, etc.;
- 58.1% in eating in a gastronomic restaurant;
- 55.6% in eating in a restaurant popular with locals;
- 52.8% in visiting a vineyard;
- 51.0% in buying local products as a souvenir;
- 49.6% in visiting a typical café;
- 51% state that local products are of great importance to them.
- 29.9% healthy meals, and;
- 27.5% having local beer and wine on the menu

<sup>5</sup> Analyse du positionnement des Cantons-de-l’Est et de Sherbrooke en tourisme gourmand (Analysis of the Eastern Township’s and Sherbrooke’s Positioning in the Culinary Tourism Sector), July 2014

This phenomenon has only grown throughout the COVID-19 pandemic. Almost all the businesses and organizations who participated in the various stages of developing this strategy stated that 2020 either equalled or exceeded previous years. This is in part due to the phenomenon described above, but also due to increased social awareness of the importance of buying local. With borders closed and a population of increasingly food connected consumers with a taste for adventures closer to home, Quebecers and Canadians flocked to outdoor recreation activities and experiences, including rural agritourism and culinary tourism.

The Eastern Townships certainly felt the effects of this in 2020. Although the number of visitors declined in stores and other more “urban” environments, such as hotels, restaurants and city centres, participants noted a surprising constant flow of visitors during the 2020 tourist season. Many noted an increase in visitors from urban centres (Montreal and Quebec City), in particular young adults, couples, aged 30–40 who are outdoor recreation enthusiasts and passionate about food (but not necessarily loyal to products), looking to explore new experiences and flavours.

Given that long-distance and/or international travel will continue to be affected by the risk of contamination and consumers’ perception of said risk, we can presume that the trend towards discovering rural areas will continue over the coming years. It is therefore of the utmost importance that culinary and cultural tourism enterprises are prepared and ready to welcome these new markets in order to provide memorable, rewarding, multi-sensorial experiences.



The business survey revealed that most participants believe the Eastern Townships are currently viewed by those living in Quebec's big cities (Montreal, Quebec City) as a renowned culinary tourism destination (88%, n=77). Over half of the participants believe the region is viewed as a must-visit culinary tourism destination by its own inhabitants (62%, n=54) and 59% believe that it is renowned for its culinary tourism by the rest of Quebec (excluding Montreal and Quebec City) (n=51).

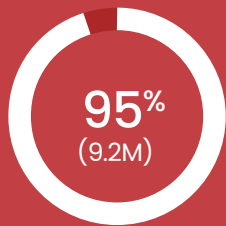
In contrast, it's worth noting that a minority of participants believe the Eastern Townships are viewed as a renowned culinary tourism destination by the other Canadian provinces (14%) and internationally (9%). Data from Statistics Canada—upon which Tourism Eastern Townships' current marketing strategy is based—also points to the same findings regarding the region's tourism market (right, in translation).



The fact that most of the participants believe the Eastern Townships are currently recognized for their culinary tourism offer by the region's inhabitants, by those living in Montreal and Quebec City, and by those living elsewhere in Quebec suggests that the region has a well-established culinary reputation across the province.

## Findings

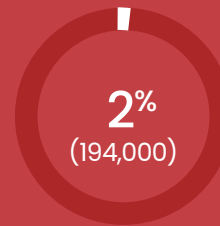
### Customers origins



Quebec



United States



Canada

### Popular activities

Parks, driving, agritourism, restaurants, museums

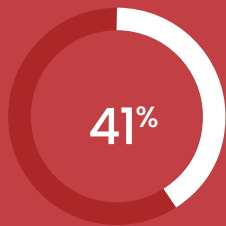
### Sports

Hiking, beach/bathing, cycling, boating

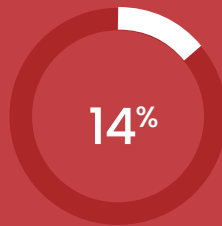
In Quebec, the main markets are Monterégie, Montreal and the Eastern Townships

In Canada, the Ontario market dominates at 70%, with Ottawa far ahead Toronto

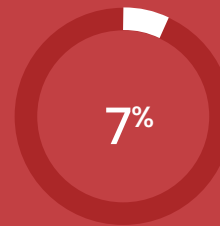
In the United States, the main markets are:



Vermont



New Hampshire



Massachusetts

The region's culinary reputation beyond the province of Quebec remains to be developed, especially in remote centres away from provincial borders. Some of those interviewed stated that there is interest from international and Canadian markets, but that it is rare and spread out depending on the proximity of the companies to the markets (e.g. companies closer to the US/Canada border receive more clients from those markets). Some also mentioned that the region welcomes a significant number of visitors from Ontario and elsewhere in Canada, mainly in relation to historical and family ties, i.e. to visit relatives or to spend time in their holiday home/cottage. These traditional ties with the region could be strengthened to encourage ambassador referrals and create a sense of pride and belonging to the region in order to attract new markets.







# Strengths, Weaknesses, Opportunities and Threats (SWOT)

The strengths, weaknesses, opportunities and threats of the Eastern Townships destination are listed in the table below and support the region's strategic positioning with regard to the future development of culinary tourism:

## **Strengths**

- A strong foundation of enterprises that recognize the region's value and reputation as a culinary destination.
- Existing reputation across the province as a culinary destination.
- Recognized brand images enabling potential visitors to identify local flagship products (e.g. Wine Country Trail, Brasseurs des Cantons);
- Priority placed on developing the region's culinary tourism offer in the Tourism Eastern Townships' general strategy;
- Increased involvement of tourism enterprises in the context of the COVID-19 pandemic;
- Existing network of partners and government organizations with an interest in developing culinary tourism in the region;
- Envious variety and quantity of high-quality, renowned products.

## Weaknesses

- Some of the brands used to promote tourism are not unique or powerful enough, or are not easily identifiable for tourists (e.g. Créateurs de saveurs, Cafés du village, Cœurs villageois);
- The destination is not recognized as a culinary destination outside of the province of Quebec, this is particularly true for regions far from provincial/country borders;
- The destination's name is not easily identifiable for non-Quebecer tourists (for example, the region can be referred to as Estrie, the Cantons-de-l'Est or the Eastern Townships);
- Companies often struggle to identify the products that make the region unique and attractive;
- A limited comprehension by several companies about how to build tourism experiences through sharing local stories and traditions and by integrating multi-sensory elements;
- The region's unique products (ingredients and/or flavours) are not always well defined or identifiable by the region's companies, excluding the most famous ones, such as wine and beer;
- Companies tend to see themselves as local and to collaborate in clusters in their own communities, as a result they do not see themselves represented in regional (and more widespread) marketing and development strategies;
- The level of awareness and interest in developing culinary tourism in the region varies from one municipality to another.

## Opportunities

- Promoting local products through culinary and food service enterprises;
- Sustained and enviable interest in collaboration between producers and processors (food chain);
- Proximity to the Quebec/Ontario and Canada/US border and Quebec's major cities;
- Priority support for agri-food development by the government of Quebec (project funding) and leading provincial agencies (AATGQ, AITQ);
- The complementarity of the culinary tourism market and the primary pull product (outdoor recreation);
- The region's cultural wealth and strong identity that sets it apart from other regions of Quebec (e.g. linguistic and cultural duality);
- Regional and local pride and a strong sense of belonging.



## Threats

- Communication overload for companies who feel overburdened by the amount of information received;
- Wide range of local and regional business support agencies and a lack of collaboration between them, in other words, agencies competing to win a company's interest;
- The distance separating experiences may dissuade some visitors from veering off the main roads and visiting communities;
- Proximity to other destinations renowned for rural/culinary tourism (e.g. Vermont);
- Fierce competition with other regions of Quebec to be identified as the province's best culinary destination (e.g. Charlevoix, Montérégie, Montreal, Quebec City, Saguenay).



Verger le Gros Pierre par Daphné Caron

# Strategic recommendations

# Strategic Positioning

Following the environmental and SWOT analysis, the CTA concluded that several objectives of the previous regional culinary development strategy (2018–2020) are still valid and can be continued, this has been confirmed by industry partners and stakeholders. However, the CTA has revised the pillars and recommendations in order to adapt them to the reality of today's regional culinary tourism industry and industry forecasts for the coming years, i.e., post-pandemic recovery.

The business survey revealed the most significant opportunities to develop in order to elevate the destination to must-visit culinary tourism status in Quebec and Canada by 2023. Participants responded as follows:

- |  |                  |
|--|------------------|
| <b>1/</b> Shape the Eastern Townships' reputation as a "culinary region" and diversify its promotional activities related to local culinary experiences and trips        | <b>66%, n=56</b> |
| <b>2/</b> Develop and/or strengthen local culinary trails (e.g. Wine Country Trail, Brasseurs des Cantons-de-l'Est)  | <b>59%, n=50</b> |
| <b>3/</b> Continue promoting culinary and regional experiences targeted by product type (Cafés de village, Coeurs villageois, Wine Country Trail, Brasseurs des Cantons) | <b>59%, n=50</b> |
| <b>4/</b> Enhance agritourism producers' understanding of the development and management of the tourism component of their product.                                      | <b>58%, n=49</b> |
| <b>5/</b> Support the development, diversification and promotion of culinary events in the region, both new and recurrent.   | <b>56%, n=48</b> |



In addition to the five pillars identified in the 2018–2020 culinary tourism strategic plan and the five priorities identified through the survey, participants stressed the importance of collaboration between the region's industry stakeholders. Culinary tourism enterprises and regional, provincial and national partners would benefit from increased regional awareness about the products available from producers (in particular small, sole-source producers).

The COVID-19 pandemic has negatively impacted the tourism industry, but it has also been a catalyst for evolving government agencies' reflections of the obstacles and challenges faced by companies and the industry as a whole. The new trend of supporting regions and their companies provides Tourism Eastern Townships with the ideal opportunity to secure the region's position as a distinct culinary destination that not only meets visitors' expectations, but exceeds them. It is therefore important that Tourism Eastern Townships ensure that the themes, brands and images used in future marketing campaigns draw on the fact that visitors and local clients are looking for well-known, emblematic products on a short-distance itinerary (e.g. "Discover our beers and flavours") and communities that are easily identifiable on the map (e.g. "A sweet trip to Coaticook").

Given that many of the orientations of the prior strategic plan are still valid—and in some cases more closely aligned—for the region's new developmental priorities, the vision, positioning and recommendations contained herein are an evolution of the previous plan. For example, the 2018–2020 culinary tourism strategic plan prioritized the "development and organization of one-off events." Without denying the importance of continuing to use events to boost marketing and attract tourists to the region, Tourism Eastern Townships could benefit from supporting or coordinating initiatives that create or strengthen experiences that can be included in a seasonal or year-round travel itinerary, and in doing so, create a more substantial inventory of flagship products to support its efforts to gain the desired positioning.



### **2021-23 vision**

That the Eastern Townships gain a reputation as a Canadian culinary destination due to the diversity and quality of its products and through experiences inspired by its strong, distinct culinary identity.

### **2021-23 position**

The Eastern Townships region can be defined by the wealth and diversity of its culinary products, its unique wine-growing nature, by its stories, its cultures and unique customs, by its artisans' hospitality and expertise, and by its enchanting setting.





# Pillars of Development

## **Pillar 1: Destination Marketing**

**Priority 1.1:** Clarify and reorient or build themed trails and/or culinary itineraries that are most likely to attract tourists and that are based on unique products or stories.

**Priority 1.2:** Structure the marketing strategy and products to truly showcase the region's culinary identity through the flagship products that make the Eastern Townships Quebec's greatest culinary destination.

## **Pillar 2 : Destination Development**

**Priority 2.1:** Advocate for culinary tourism and the benefits it brings to those working in the sector to improve the quality of the experiences on offer.

**Priority 2.2:** Identify the unique aspects of the region's stories, customs and practices, and flavours, in order to define and create a clear, marketable regional culinary identity.

## **Pillar 3 : Concertation et facilitation**

**Priority 3.1:** Establish and create the resources required to implement developmental priorities and bring culinary tourism products to market.

**Priority 3.2:** Be an enabler and leader in strengthening the ties between the sector's collaborators who are intrinsically linked to developing the culinary tourism products.









# Strategic framework



Fromagerie La Station par Gaëlle LeRoyer

PRIORITIES	2021–2023 ACTIONS
<p>1.1 – Clarify and reorient or build themed trails and/or culinary itineraries that are most likely to attract tourists and that are based on unique products or stories</p>	<ul style="list-style-type: none"> <li>• Develop local culinary trails with ideas for “days out” or “short trips”;</li> <li>• Continue to promote culinary experiences and regional experiences with a culinary theme, either by product type (e.g. wine, beer, cheese) or by flavour/theme acknowledged as being typical of the region or community (e.g. typical dishes only found in one municipality or recipes that use a unique ingredient that comes from the area, for example duck or apples);</li> <li>• Strengthen and encourage local clusters of companies that provide high quality experiences.</li> </ul>
<p>1.2 – Structure the marketing strategy and products to truly showcase the region’s culinary identity through the flagship products that make the Eastern Townships Quebec’s greatest culinary destination.</p>	<ul style="list-style-type: none"> <li>• Develop a promotional approach for local culinary experiences and “days out”;</li> <li>• Actively participate in AITQ initiatives for markets beyond Quebec;</li> <li>• Consolidate and support regional brand strategies in order to identify agri-food products from the Eastern Townships (e.g. on restaurant menus, on agri-food retail products);</li> <li>• Incorporate bold messaging into future marketing campaigns to ensure the destination is recognized as Quebec’s must-visit agri-food and culinary destination;</li> <li>• Collaborate with industry partners (companies) to identify the best stories, flavours, recipes and our other anecdotes related to the region’s heritage, history or culture.</li> </ul>
<p>2.1 – Advocate for culinary tourism and the benefits it brings to those working in the sector to improve the quality of the experiences on offer.</p>	<ul style="list-style-type: none"> <li>• Support the enhancement of the Cr�ateurs de saveurs brand in order to incorporate the criteria and objectives related to the quality of the experience and the promotion of regional cultural identity (through storytelling);</li> <li>• Support the implementation of the Cr�ateurs de saveurs brand with producers, farmers’ markets and retailers, emphasizing the improved visitor experience;</li> <li>• Support local and regional initiatives that establish a series of initiation and/or outreach activities to explain the benefits and challenges of providing multi-sensory culinary experiences or other experiences based on regional culinary identity.</li> </ul>



PRIORITIES	2021–2023 ACTIONS
2.2 – Identify the unique aspects of the region's stories, customs and practices, and flavours, in order to define and create a clear, marketable regional culinary identity.	<ul style="list-style-type: none"> <li>• Educate those involved in the culinary tourism value chain as to the importance of a culinary identity for the development and management of the tourism component of their activities;</li> <li>• Conduct a series of consultation activities with said parties (communities and companies) to identify the flavours, recipes, stories and traditions that define the region and its culinary identity.</li> </ul>
3.1 – Establish and create the resources required to implement developmental priorities and bring culinary tourism products to market.	<ul style="list-style-type: none"> <li>• Define the resources required to ensure the destination achieves its objectives for the development and marketing of culinary tourism as a catalyst for regional tourism;</li> <li>• Prioritize a budget allocated specifically for the development and commercialization of culinary tourism.</li> </ul>
3.2 – Be an enabler and leader in strengthening the ties between the sector's collaborators who are intrinsically linked to developing the culinary tourism products.	<ul style="list-style-type: none"> <li>• Identify and/or define (in the form of a directory based on the company's needs) the roles of each local, regional and provincial organization that supports the development of culinary tourism enterprises;</li> <li>• Facilitate collaboration between the organizations (municipal, regional and provincial) involved in or which support the development and promotion of culinary tourism across the region.</li> </ul>





# Conclusion

Having already earned its reputation as a culinary destination, the Eastern Township's identity as a tourism destination is intrinsically linked to its culinary identity. Whether visiting the region for outdoor recreation or as a stop on their itinerary, visitors expect memorable and unique culinary and agri-food experiences. The destination's brand image needs further development, not only through a culinary-centric marketing strategy, but also through ensuring that the culinary tourism offer is ready and meets the high expectations of the tourism market.

By rolling out new initiatives, support and a vision that emphasizes destinations and companies adapting to the new reality of the tourism industry, Quebec's tourist institutions and the provincial government are dictating the path each region must take to ensure the sector, which has been devastated by the COVID-19 pandemic, recovers.

The Eastern Townships region has gotten off to a head start by arming itself with destination development strategies and by aligning itself with well-established, solid regional and local partners. By taking on a collaborative lead in the promotion of culinary tourism and by supporting the implementation of support programs for culinary and agri-food enterprises, such as the Cr ateurs de saveurs brand, Tourism Eastern Townships (and the destination in general) is already well equipped to take on the changes in the market over the coming years. All that remains is defining and positioning the region's identity to ensure it is definitively recognized as the must-visit culinary destination in Quebec, and eventually in the whole of Canada.



Moulin à laine d'Ulverton par Daphné Caron

To do so, the industry must first and foremost understand and take on the role of culinary tourism leader. There is no denying the strong regional pride for its high-quality agri-food products—nor that some of its products are already famous outside of the region, such as wine and beer—but these products need to be developed, adding more layers to ensure the region can build a solid foundation of product themes that represent its culinary tourism offer as a whole. The destination therefore needs to take the next few years to identify what makes it unique and not only with regard to agri-food products, but the flavours, dishes and stories that set the region apart. Customs and practices, traditions and historic processes enhance culinary experiences making them memorable, recognizable and unique to the company and community.

This strategy will challenge the Eastern Townships region to revisit how it incorporates the concept of culinary identity in its destination development and marketing strategies. The strategy challenges the region to dare to proudly wear the badge of a must-visit culinary destination, something which its businesses seem to already believe to be true.



# Notes

<sup>1</sup> F&Co, “Food Connected Consumers”, Nov. 2019.

<sup>2</sup> F&Co, “Food Connected Consumers”, Nov. 2019.

<sup>3</sup> The New Era of Food Tourism: Trends and Best Practices for Stakeholders. Skift, 2019.

