

Savour the Flavours of Dumfries & Galloway

Project Evaluation

Final Report

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1 Introduction

Background

The evaluation of the Savour the Flavours (StF) of Dumfries and Galloway project was commissioned to be delivered by SAC Consulting in association with MKA Economics in March 2013. The aim of the evaluation is to examine the operation of the StF over the period 2011 to 2013 and evaluate its performance against the project objectives.

StF is for everyone who produces, uses and enjoys Dumfries and Galloway food and drink. Led by food and drink businesses, StF was formed to create a stronger and more focused food and drink industry in Dumfries and Galloway. It does this by supporting producers, retailers and manufacturers to grow and develop; by encouraging chefs and the wider hospitality sector to use and promote local food and drink; by encouraging local people and visitors to embrace Dumfries and Galloway produce and by helping children learn about local produce.

The project aims were shaped by a previous programme in 2009 – 2011, and the overarching aim of the 2011 – 2013 programme was to nurture and develop five stand alone industry led projects. These being:

- Food and drink producers
- End users (chefs, restaurants, retailers)
- Consumers (local people and visitors)
- Farmers' markets
- Young people

While previous programmes had sought to support the food and drink industry in Dumfries and Galloway, the 2011 – 2013 programme focused on nurturing and developing these five subsidiary projects. The long term aim being for these five projects to mature sufficiently that the projects can become collaborative industry led, stand alone projects spinning off from the StF umbrella in their operational activities, in turn supporting StF project at a strategic level.

At the inception of the 2011 – 2013 programme period, StF recognised that each of the target groups were at differing stages of development. For this reason StF established specific project aims under key target groups, these being:

Producers, End Users & Members

- To continue strong industry engagement and to facilitate collaborative working within industry groups
- To raise the profile of locally produced food and drink at regional and national levels and to assist in encouraging end users to use products from local suppliers
- To position Dumfries and Galloway as a region with an exceptional artisan food & drink product
- To raise the profile and promote Dumfries and Galloway as a food tourism destination

Consumers

- To make StF a recognisable consumer brand, symbolising quality and excellence in Scottish food and drink
- To position Dumfries and Galloway as an area with exceptional food and drink, working towards its establishment as one of the UK's top food and drink destinations
- To deliver a strong local food message across the region to local people and visitors

Children/Schools

- To work with schools throughout the region to enhance the delivery of a better understanding of local food and drink available in the region

It became apparent that other sub-projects had evolved during the period of the programme, including the Deliciously Good Food Group and the Catered4 project. These sub-projects have also been reviewed as part of this evaluation.

Evaluation Objectives

The aim of the study is to evaluate the programme using both quantitative and qualitative measures to assess the impact of the programme on Dumfries and Galloway's businesses and the effectiveness of the programme in meeting its objectives in relation to the core funders, namely the Dumfries and Galloway LEADER Programme and Dumfries and Galloway Council.

The results of the evaluation are to be used to:

- Measure any gains made
- Develop or modify the project and its delivery for the future; and
- Determine the level of resources to be directed towards the programme in the future

The study brief indicated that the following areas should be addressed in the evaluation:

- An assessment of the success of the project in meeting its main objectives and targets (in qualitative and quantitative terms) and the extent to which the project objectives are still valid
- Measurement of the impact of the project, in both quantitative and qualitative terms including:
 - The direct effects of StF activities on its members and the outputs and impacts which can be attributed to the overall project
 - Assessment of value for money of the project
- Consideration of the views of individuals, companies and spin off groups who have participated in the project and their future requirements and expectations
- An assessment of how the various elements of the project fit together and consideration of elements of assistance currently missing from the programme
- Consideration of how the project can be improved to meet the evolving needs of the industry
- Recommendations for the future direction and development of the project and appropriate performance measures for the ongoing monitoring and management of the project.

Evaluation Methodology

The methodology, as set out in the evaluation proposal, focused on four main activities:

- Stakeholder engagement
- Review of project activities and milestones
- Sub-Project engagement
- Business/Member surveys

In order to clarify operational activity the project team consulted separately with executives from the key stakeholders including, Dumfries & Galloway Council, LEADER, VisitScotland, Destination D&G, Dumfries and Galloway College, the NHS, Scottish Government Rural Communities Team and the Royal Highland Show Presidents' Initiative. The purpose of these discussions was to identify the range of strategic issues, seeking views on current practice and future direction.

Discussions also took place with key project personnel and participants at each of the five sub-projects, including the D&G Chefs Association, Dumfries and Galloway Farmers' and Community Markets Association (DGFCMA), the Education Department in regard to the Schools Programme, Deliciously Good Food Group and The Catered4 project. The purpose of these interviews was to gain a better understanding of project activity and the role of StF now and into the future.

Additional research was undertaken to assess and evaluate the delivery of the StF programme in order to assess their impact and value. An online survey format was e-mailed to the StF contacts database. The questionnaire was specifically created to be concise and in a short format to maximise the completion rate. It also replicated some questions from the 2009-2011 evaluation in order to allow direct comparison to track progress.

The questionnaire (See Appendix 1) was designed to produce a combination of quantitative and qualitative responses. This allowed a better understanding to be gained from the strength of feeling about a certain subject, with relevant ease of implementation.

Report Structure

The remainder of this report is structured as follows:

- **Section two** provides an overview of the main findings from the stakeholder interviews;
- **Section three** summarises the review of project activities with a particular focus on the findings from the interviews with the various sub-projects set-up and supported by StF;
- **Section four** presents the results of the online business survey; and
- **Section five** highlights the key conclusions that have emerged from this research.

2 Stakeholder Consultation

Introduction

In order to gain a strategic overview of the programme a number of key stakeholders were interviewed during the evaluation. Each interview was structured to gain views on the following topics:

- Level of involvement and interaction with StF
- Views on the benefits of StF
- Views on the future development and focus for StF

Aspects of the interviews were supplemented by an online survey of stakeholders, this resulted in a number of additional pieces of qualitative information which has been added into this section. The following organisations were consulted at this stage:

- Dumfries and Galloway Council (Business and Enterprise / Economic Development)
- Dumfries and Galloway LEADER Programme
- VisitScotland
- Destination Dumfries and Galloway
- Dumfries and Galloway College
- NHS Dumfries & Galloway
- Scottish Government: Rural Communities Team
- Royal Highland Show: President's Initiative 2012

Dumfries and Galloway Council

Level of involvement

Dumfries and Galloway Council has been a major funder of Savour the Flavours since its inception in 2009. The local authority contributed £100,000 to the project during the 2011/12 and 2012/13 period, and also provided £15,000 towards Flavour Fortnight in 2011. The Council has also provided considerable human resource to the programme and values the efforts of all partners involved in the development of the sector.

A two year Service Level Agreement (SLA) is in place between the Council and StF which identifies a number of shared aims. The SLA also sets out a range of outputs, outcomes and measures for the period to June 2013.

As well as acting as a key funder, the Council has a close working role with the project and there are a number of synergies with other Council services. During the programme period this has included links to the Creative Cluster programme, the Financial Assistance for Small Businesses funding programme and the Council's collaboration initiative.

It is clear that there is a high level of involvement between DGC and StF, on one hand this is related to the funding relationship, but also involves an operational level of involvement in terms of supporting business growth and regional economic development.

Key Benefits

A number of key benefits were identified through the consultation process, notably it was felt that StF has grown into a respected and effective industry representative body for the region. It was noted that StF provides a strong voice for the sector in SW Scotland and provides businesses with a forum to exchange ideas, collaborate and to promote the region's larder. The project is known to deliver tangible benefits and it is well respected and valued by members.

A notable strength of the organisation is its Project Manager who is both trusted and respected by the sector. The Project Manager has been pivotal in developing the StF and is both knowledgeable and enthusiastic about the sector. The dynamism offered by the StF team has enabled the project to grow and diversify into new areas whilst ensuring core activities are delivered.

DGC made reference to the valuable role which StF played in helping to coordinate the region's food and drink presence at the Royal Highland Show in 2012. Without the project this would have been a much harder activity to resource.

DGC noted that they were happy with the progress that had been made across all outputs and outcomes during the programme period. It was felt that the project had managed to maintain its important independence role while also working proactively with the Council and other partners to strengthen the value and opportunities of the sector.

Future Direction

As noted above it is clear that the Project Manager has been a key driving force behind the continued success of StF, however, it was noted that this also provides a challenge for the organisation in terms of succession planning. It was felt that there may be merit in refocusing the organisation back to its core values of providing a voice for the food and drink sector with an obvious marketing and lobbying role for the local food sector.

StF has been effective in establishing new sub-groups, a number of which now have their own structure and plans in place. In light of continued budgetary cuts and the closure of LEADER programme DGC suggests StF should re-focus on core activities. The previous programme was seen to be 'new' as it focused on establishing new sub-projects and this fitted well with LEADER funding. However, in light of the LEADER closure it was felt that StF should return to core activities and that this will help strengthen the organisation by allowing it to focus on a number of key activities rather than a series of new activities.

In terms of specific areas for future consideration it was noted that there was scope to support local firms enter the export market, this was being reviewed by DGC and Scotland Food and Drink. Similarly it was felt more could be done to keep the industry abreast of the ever changing legislative and regulatory environment.

It was noted that securing funding from DGC would continue to be difficult and the project would benefit from showing some financial buy-in from the sector. It was noted that although the project was never established to be self funding, it is recommended that the project assesses cost recovery options during the next programme period.

It should also be noted that to ensure Council compliance with its responsibility under EU State Aid guidelines; forward Food and Drink Sector Industry representation will be undertaken by the Council through a commissioning framework model. This will be through an open procurement process clearly outlining the Councils requirements of the organisation that is successful in delivering the Regional Food and Drink Initiative through this process.

There is a continued desire to see the food and drink sector act as an important element of the tourism offer and it is critical that StF continues to work in close partnership with Destination D&G. Destination D&G is actively seeking key partner involvement and must be linked with the food and drink sector to provide the strongest possible outcomes for the Dumfries and Galloway economy.

Dumfries and Galloway LEADER Programme

Level of involvement

LEADER provided match funding for the 2011/12 – 2012/13 programme period contributing £122,500 towards the project. As noted above LEADER is unable to fund the same project activities and therefore a new project was developed for 2011 – 2013 (StF II) which centred on the establishment of five new sub-projects working within the StF umbrella. LEADER also contributed finance towards Flavour Fortnight in 2011.

LEADER maintained regular contact throughout the period of the project and this tended to focus on monitoring progress and managing financial claims. Recently, the national LEADER programme invited StF to a pan-European conference in Berlin to showcase Scotland's LEADER programme as well as promoting local food. This was noted as a significant success. StF was the sole contributor from Scotland at this event.

Key Benefits

The local LEADER programme indicated that StF was a brilliant example of best practice and this was validated at both a national and an EU level. StF is seen as an exemplar project and has been successful in achieving what it set out to achieve. A key element of its success was having the right person in post and the Project Manager has driven the continued success of the project. It was noted that the Project Manager has all the skills and personality to make a project such as StF a huge success.

StF is very good at representing the food and drink sector and is respected across the region. A key benefit being its ability to promote local food and drink and encourage people to grow, cook, serve and eat local produce. Segmenting the project into various sub-projects was also noted as a key to its continued success and there were examples where additional leverage was provided by LEADER through the inception of new programmes such as the Farmers' Market Development Programme. If LEADER was still open it is likely that StF would be a strong contender for continued funding and support.

Future Direction

LEADER noted their inability to provide funds over the next two years but there was a strong possibility that there would be a potential suitable funding programme post 2014. LEADER is currently developing a new local strategy and is in dialogue with the Scottish Government

about a new programme and its funding allocation, but this is not likely to be launched until 2015.

In terms of the economic climate and availability of funding it was noted that StF would have to be more targeted in its delivery and this may mean less work with non-core projects and groups. It was noted that StF has been effective in helping establish new groups and these are now operational and therefore should be less of a draw on StF time and resource. Refocusing on core activities may help StF to continue to be an effective local organisation within the confines of limited funding.

Although there is scope to make future application to LEADER in the next EU funding round (2015-2021) it was noted that the project's chances of success would be enhanced through the role of businesses and members in contributing towards further resource towards the operation of the programme. LEADER noted the importance of continued in-kind support of local businesses and organisations highlighting that this is an important feature of the LEADER programme. Importantly this helps confirm that the project is of value to the local food and drink sector and can assist in making a stronger case for future funds.

LEADER did note that the next programme is expected to be more focused towards business support and enterprise and therefore there is likely to be considerable scope to support StF in the future.

VisitScotland

Level of involvement

VisitScotland has started to work closely with StF and the VisitScotland Regional Manager meets with the StF team on a quarterly basis. StF is recognised by VisitScotland as a key stakeholder and the industry representative body for the food and drink sector. VisitScotland also work with StF through 'In Kind' marketing support.

VisitScotland indicated the importance of the food and drink sector to the regional tourism offer and it was important for StF to have a strong voice to maximise the tourism opportunities linked to the local food offer.

VisitScotland noted that StF's Flavour Fortnight is the region's most innovative food festival and they take great pride in being able to help promote this event through their online and offline channels.

Key Benefits

VisitScotland highlighted the key role of a quality local food offer for the region's tourism profile, this included the role of events such as farmers' markets, Flavour Taster and Flavour Fortnight. VisitScotland hold StF in high regard and value their role in helping strengthen the tourism offer and profile of Dumfries and Galloway.

VisitScotland rate the event impact of StF activities and noted the sizeable tourism appeal of the recent Flavour Fortnight which evidenced that many visitors were drawn into region during Flavour Fortnight. The festival gives VisitScotland a strong proposition to engage and inspire consumers to come and visit the region. By ensuring that the ethos of the festival is home grown and local offers a sense of place and authenticity.

VisitScotland use the food festival as a 'hook' story to secure PR and or journalist visits to Dumfries and Galloway thereby protecting visibility prior to the autumn/winter period.

It was also noted that the success of growing local businesses also helps to market Dumfries and Galloway as an attractive location to visit, this includes the export of products out of the region – notably the recent success of one firm at a pan-European trade show facilitated by StF.

Helping to strengthen the identity of the region is critical to tourism success, and cottage industries and small producers continue to play an important role in providing a local experience to visitors. StF has played a valuable role in marketing the region as well as encouraging businesses to grow, cook and serve local produce.

VisitScotland noted that StF offers real and valuable solutions to the farming, retail and hospitality sectors which ensure that they can find a profitable route to market for their produce. StF has a fantastic network of mentors which they link to new operators - this offers a great opportunity to network, share best practice and discuss important legislation that may be affecting the operating opportunities for the food industry.

VisitScotland also recognise the important lobbying and partnership role played by StF, both at the regional and national level and this has also helped Dumfries and Galloway ensure the region gets its fair share of resource and support. VisitScotland also recognised the important facilitation role played by StF in supporting skills and training for the sector and noted its vital role in establishing the Chefs Association, Farmers' Market Programme and the School Pilot Programme. All of these initiatives have aided the ability of local producers,

retailers and restaurants to promote the value of local food. Providing a leadership and mentoring role has helped new businesses as well as established businesses focus on local food and this is critical in promoting food tourism as part of the overall tourism product.

Without StF, it is unlikely that any of the successes of recent events, marketing and new local food offer would have been achieved. Although Destination D&G have an important role to play in promoting the tourism appeal of the region they are not experts in food tourism and StF can play an important role in growing this element of the tourism sector.

Future Direction

Financial constraints can be a challenge in the current climate and VisitScotland noted that StF does an outstanding job with the resources they have. The series of events were noted as being 'fantastic' and with some additional funds there could be a significant increase in visibility which would attract additional visitors from further afield.

VisitScotland would like to see StF continue as the industry representative body for the food and drink sector and to keep promoting the importance of local produce, organising events and marketing the region as a food destination. Ultimately, VisitScotland would like to see D&G as an aspirational place to visit and the region's larder will play an important role in achieving this vision. VisitScotland also recognise the importance of promoting Dumfries and Galloway produce outside the region, this also serves as an important feature in promoting the region as an attractive location to visit, spend and stay.

VisitScotland appreciated the difficult funding environment but would like to see StF being given funding over a longer period of time. Rather than a two year programme VisitScotland felt StF would benefit from longer funding commitments, such as three to five year support, in order for the project to further their ability to encourage more emphasis on local food, events and regional marketing.

Essentially, the sense of place requires a lot more effort, excellent progress has been made, much of which has been championed by StF but there is still a long way to go and other regions are continually marketing their own areas which mean D&G must not let up on the marketing, product development and event based tourism strategy.

Ultimately, VisitScotland would like to see StF continue to provide networking, leadership and real tools for the sector. There remains scope to apply for additional funding through

EventScotland, Scotland Food and Drink programme and LEADER to further develop Flavour Fortnight into one of the UKs best loved food festivals.

Destination Dumfries and Galloway

Level of involvement

DD&G has continued to have an ongoing involvement with StF over the past two years. StF has been seen as a partner to DD&G from the start and it was noted that this continues to be the case as it is important to have a strong link with the food and drink sector as food tourism was seen as a core component of the tourism sector. DD&G is in the process of restructuring and will be setting up sector specific directorates and StF would be nominated to the board to represent the food and drink sector.

Key Benefits

DD&G noted the value of the events that are led by StF and the focus on local food has helped promote the region as a place to visit. The events are critical for the region and have helped establish and grow awareness of the local food sector as well as encourage new visitors into the region.

StF has played an important role in encouraging businesses to promote local food and this should be encouraged. It was noted that many firms still think local food is expensive and difficult to source, and StF play an important role in addressing this barrier.

StF has also assisted in addressing the skills and training barrier to growth, this is a difficult area to address by one single organisation but StF has shown an understanding of the sector and its skills requirements.

StF also play an important lobbying role and have developed successful partnerships with key officials at regional and national levels, this has helped ensure programmes and activities are delivered locally.

DD&G reiterated that good local food was an intrinsic part of the tourism offer of any region and what adds to its distinctive appeal and authenticity – and that this was precisely what StF was doing.

Future Direction

It was felt that although StF have a good handle on the local food sector they are not fully representative of the food and drink sector, notably the larger firms and the agricultural and fisheries sector – which are defined as food and drink at the national level. To be fully representative of the sector more should be done to engage with non-members as they can play an important role in promoting D&G as a food destination. However, it was noted that limited resource and funds continue to make this difficult.

It was noted that more work needs to be done in encouraging supply chain opportunities, for example, 95% of scallops landed in Kirkcudbright go to markets outside the region and there remains issues in regard to a local abattoir. This is an example where there remains coldspots in terms of sectoral coverage and economic opportunity.

DD&G noted that what StF achieve with the resources at their disposal is fabulous but there remain many firms who still do not understand the value of local produce and continue to utilise national food suppliers. There is a long way to go as it is 'very easy to get a bad meal in Dumfries and Galloway and very hard to get a good meal'. StF has helped address this issue but a lot more has to be done.

DD&G also noted the skills and training issue and the fact the College did not put in a training kitchen has not aided this issue. StF can play an important lobby role in this area as there is reluctance with local businesses to invest in training.

DD&G is aware that public funding is difficult to access and therefore it is important that StF innovate in order to deliver enhanced outcomes and critically this should focus on educating key user groups that local food is not expensive and is of good quality. Similarly, StF should encourage wider membership especially larger D&G firms and the fish and agricultural sector which is also deemed 'food and drink' by the Scottish Government.

Importantly StF and DD&G must strengthen their own working relationship and this should be rectified as part of the forthcoming restructure of DD&G.

Overall, it was clear that DD&G conveyed a sense of appreciation for the great work that StF are doing but there is a continuing requirement for them to carry on. Continuing to achieve what has already be achieved is important and there is a continued need to engage with the food service industry more widely in order to try and get the message of good local food out.

Dumfries and Galloway College

Level of involvement

As a College, the Dumfries and Galloway College have had meetings about every six months. StF circulated information to its members on pilot courses that the college was running. Stf wanted College students to develop videos but this wasn't feasible within timescales for the qualifications the students were working towards.

Key Benefits

The College noted that StF is useful as it able to circulate information to its members. As an organisation that is working with similar customer bases individuals and organisations it can add real value in promoting courses as well as lobbying for support.

The College noted that StF is skilled at keeping businesses up to date about what activity is happening in the region and also within Scotland. The College noted that the Recipe for Success workshop was worthwhile attending and of good content.

Future Direction

It was felt that the College and StF could develop their relationship further by hosting events and /or running activities together. It was also noted that StF should continue to support the food producers and hospitality businesses and look at ways to improve the quality of the food offer and getting more businesses to use local produce.

NHS Dumfries and Galloway

Linda McFarlane is a Health & Wellbeing Specialist within DG Health and Wellbeing, situated within the Public Health Directorate of NHS Dumfries & Galloway. She has had direct links with Savour the Flavours through the NHS Dumfries & Galloway led multi-agency Food & Health Public Sector Procurement Group. As the chair of that group she has found having Savour the Flavours as a partner on the group a real benefit in trying to establish a link to Dumfries & Galloway food and drink producers and is now able to transfer and receive information through Savour the Flavours. There is an understanding that the procurement system is not ideal or indeed easily accessible for smaller Dumfries & Galloway producers

but by maintaining links with Savour the Flavours , she hopes this will help contribute to any future development of more locally based food procurement.

As chair of the group she would like to maintain the linkages with Savour the Flavours as she believes that the work carried out by Savour the Flavours is vitally important for the onward development of local businesses and in raising the profile of food and drink from the region. She feels that even though the group may not be directly involved in initiatives it is important that awareness of Savour the Flavours activities is maintained, not least because of the contribution it can make to environmental and economic sustainability locally. Where possible and appropriate therefore she also promotes initiatives to NHS staff e.g. through dissemination of the Farmers Market leaflet on the staff intranet.

In addition to her professional input to this review, she added that in her personal experience Savour the Flavours has been influential in driving local food and drink events and the promotion of events especially around Flavour Fortnight has been particularly successful and has provided some real inspiration within the region. She also felt that the role of the project manager has been one of the main drivers for Savour the Flavours current success.

Scottish Government: Rural Communities Team

Alistair Prior is Head of the Rural Communities Team within the Scottish Government and has witnessed Savour the Flavours develop over the past 3 years into a fully engaging food and drink network meeting the needs of the Dumfries & Galloway region. In 2012 Alistair invited Savour the Flavours to the International Green Week Exhibition in Berlin. The purpose of the invitation was to showcase how with the help of Leader funding Savour the Flavours has successfully engaged with the rural sector and formed tangible links between the local food and drink producers and the tourism sector and has also been a conduit for business growth.

Alistair commended Savour the Flavours for their co-operative approach and suggested that this would be increasingly important moving forward as it is likely that future Leader funding options will require co-operation, collaboration, innovation and sustainability at the core. It is believed that sharing of best practice and knowledge transfer will be vitally important not only across the regions of Scotland but also across European borders. It was suggested that Savour the Flavours could explore best practice with European partners who have accessed funding but have ultimately moved to a sustainable model. This would not only be an

innovative approach but would also be seen to meet elements of co-operation, collaboration and sustainability.

Royal Highland Show: President's Initiative 2012

Alex Fergusson MSP was RHASS President in 2011-2012 when Dumfries & Galloway held the Presidency of the 2012 Royal Highland Show, and he had significant direct contact with Savour the Flavours during that time.

Mr Fergusson used to say that the best thing about Savour the Flavours was its name. However, since Dave Smith and Liz Ramsay became involved he has watched it grow into what he believes is a model that is widely recognised as the bench mark of best practice in the promotion of locally produced Food and Drink in Scotland.

In 2011 Mr Fergusson was asked to serve as the Honorary President of the Royal Highland and Agricultural Society of Scotland for 2012, it being Dumfries and Galloway's turn to 'host' the Highland Show. With that post came the opportunity to mount the 'Presidents Initiative' at the Highland Show. The first call was to Savour the Flavours, and with the considerable support and advice of that organisation he mounted 'the greatest collaborative partnership across Dumfries and Galloway that has ever been seen'.

The partnership that evolved included Dumfries and Galloway Council, Destination Dumfries and Galloway, The Chamber of Commerce and Savour the Flavours as the main partners, and the result was an inspiring stand in the Food & Drink Hall at the show that stood alongside the Savour the Flavours sponsored cookery theatre. In addition there was also an outdoor 'Village' to showcase the wider nature of D&G activities. In total this involved a financial outlay of approximately £80,000 and Mr Fergusson firmly believes that none of that effort would have come to fruition without the input of Savour the Flavours.

Mr Fergusson believes that Savour the Flavours brings countless benefits to the Region, but none better exemplifies its worth than 'Flavour Fortnight'. In its short history, this innovative project has not only greatly boosted the regions local economy (to the tune of some £280,000 last year according to the independent evaluation, showing a return rate of £14 for every £1 invested) but it also contributed over 50% of the total number of events to Scotland's National Food and Drink Fortnight.

According to Mr Fergusson, Food & Drink has been one of the undoubted successes for Scotland over recent years. The importance of those products within Dumfries and Galloway has grown at a phenomenal rate, with a great deal of that growth due to the input of Savour the Flavours and he believes that the thought of Dumfries and Galloway without the organisation doesn't bear thinking about.

Section Summary

The interviews with key stakeholders have indicated that all regional bodies linked to StF are supportive of the organisation. Each body has stated that StF is a valuable project to the food and drink sector in Dumfries and Galloway and has been successful in achieving what it was set up to achieve, namely promoting the food and drink sector.

Stakeholders rate the project highly and would like to see it continue in its current form, however this is likely to be a challenge in the current economic and funding environment. The closure of LEADER and the continued budgetary pressures on the local authority suggest that the future operation of the initiative will be challenging. Ultimately elements of co-operation, collaboration, innovation and sustainability across regional and European borders will need to be considered.

Case Study 1



During the 2011–2013 project Savour the Flavours identified end users as a priority area. Chefs and hospitality businesses already engaging well with local produce were supported via industry groups such as D&G Chefs Association and Catered4. Increasing the use of local produce across the hospitality sector led to the development of the 'Recipe for Success' and 'Meet the Producer' events.

Recipe for Success: A series of workshops covering how to use local produce, targeting emerging markets (coeliac) and adding profitability, were held in three locations across the region, Gretna Green, Castle Douglas and Stranraer. Participant surveys noted that all responding firms found Recipe for Success useful for their own business. Almost three quarters of respondents noted that they made changes, or were planning to make changes, to their business as a result of attending Recipe for Success. Feedback included:

- The whole day was very interesting and I enjoyed learning about local produce.
- It was especially useful for me in convincing a very sceptical member of staff about the value of offering gluten free food.
- Time to re-energise and choose a focus for development.
- All aspects of the course were useful and a lot of networking.
- The chance to talk to the experts and gain valuable information that can be used in growing and making the business better meeting other business owners and exchanging ideas.

Meet the Producer: A one off regional trade show, connecting local producers with end users. Almost all of the producers (90%) noted that attending Meet the Buyer was useful for their own business. Three quarters of the firms noted that Meet the Producer offered wider business opportunities amongst the exhibitors on the day and almost all of the attending firms made a number of leads as a result of attending the event. Feedback included:

- As a new business it's very hard to cold call but attending something like this gives you a focus to work from.
- We met a number of potential customers who would stock our product in smaller quantities locally.
- Brought us into face to face contact with food businesses looking for local high quality produce.
- A great source of encouragement, ideas, contacts and general support.
- First exposure for our new cheese products, everyone seemed keen to taste.
- Met several people chef / owners that we would not previously have even considered to approach, or even would be interested in our products. Also the event really focused us on dealing direct with local companies and how they buy, how focused they are on local produce and supporting local producers. Very encouraged by their enthusiasm for buying local

Both events successfully engaged with businesses who were new to Savour the Flavours, 53% of attendees to Recipe for Success and 59% of attendees to Meet the Producer.

3 Project Review

Introduction

This section reviews the progress and performance of StF against key milestones, importantly this focuses on the status and development of the five sub-projects which were a core component of the StF II programme.

Milestones and Activities

StF has continued to engender a forward momentum over the past three years. Discussions with key stakeholders confirmed that it is certainly recognised as the one of the most effective food and drink networks in Scotland.

The complex nature of the project can make it difficult to explain succinctly, but in essence StF identifies opportunities for improvement within the food and drink sector and works in partnership with the industry to effect positive change, increased ambition and contagious optimism. Examples of activities and milestones in 2011/13 are shown in the table below.

Milestones	How achieved
<p>Develop a web content plan to increase quality and quantity of web content, and to support StF members in creating quality content</p>	<p>Website The refreshed Savour the Flavours website went live in late November, prioritising intuitive browsing and visual appeal, member content self-management, introduction of events, improvement of farmers' market section, streamlining of information to focus on consumer facing material</p> <p>Social Media A part time social post was created A hash-tag #deliciousdg was developed to ensure consistent branding throughout social media activity</p> <p>The 12 Days of Christmas saw Savour the Flavours' social networking commence a seasonal marketing campaign.</p> <p>The Neigh horse meat here social media campaign was run alongside the poster and leaflet campaign on the same theme. A very recognisable cartoon horse logo helped to create visibility and for the first time STF paid to use 'promoted posts' on Facebook in order to increase reach.</p> <p>A Winter Warmers campaign encouraged chefs / producers and others participate via social media channels in sharing seasonal dishes using local produce.</p>

<p>Develop and deliver a campaign to increase use of local food on D&G menus, encouraging chef skills development</p>	<p>The Recipe for Success workshops were specially designed to help cafes, restaurants, hotels and other hospitality businesses in Dumfries & Galloway become more successful and more profitable. Chefs from the D&G Chefs Association inspired businesses with recipe ideas, sourcing suggestions and labour saving gadgets and processes, Angela Kilday of Coeliac UK encouraged businesses to embrace the growing gluten free market while business advisor Alistair Tait talked attendees through easy ways to maximise profitability by adding value to menu through the use of quality local produce.</p> <p>The workshops were designed to 'show' rather than 'tell'. The feedback as a result was phenomenal. Over 100 people, representing over 50 businesses attended the series of three workshops which ran across the region. 53% of businesses attending are currently not members of StF illustrating that this activity was extending the reach of Savour the Flavours.</p> <p>A Meet the Producer event was held at Threave Visitors Centre on 4th February 2013 to capitalise on the momentum achieved by Recipe for Success. This special trade exhibition encouraged businesses to put more locally produced food and drink on the menus and shop shelves of hospitality and retail businesses. It also continues Savour the Flavours' recent focus on supporting the growth of the hospitality and retail sectors. Twenty producers, including D&G Chefs Association filled the venue to capacity. Seventy people attended the event, representing 40 businesses, with 59% of visitors currently non StF members (i.e not currently leading on a local produce message).</p> <p>Both producers and potential trade customers stated they got significant value from attending.</p>
<p>Publish and distribute Savour the Flavours newspaper format marketing print targeting consumers and visitors</p>	<p>Delicious D&G was originally launched at the 2011 Royal Highland Show. This publication matured in its second year, 2012, doubling in size and moving from single business focussed articles to more mature thematic articles which convey key messages to the reader. This publication also carried advertising for the first time with the hope that this is a publication that will eventually become self sustaining.</p>
<p>Review Year 1 activity and update Business & Marketing Plans for final year</p>	<p>Completed</p>
<p>Support regional presence at Royal Highland Show</p>	<p>Significant work was involved in the preparation and delivery of The Cookery Theatre and Evening Reception at The Royal Highland Show in June 2012. Liz also sat on the committee of the President's Initiative.</p> <p>Savour the Flavours took on the Diamond Package marketing opportunity of the Cookery Theatre to significantly increase the D&G footprint within the Food Hall during this Presidency year. This included 5 x cookery slots in the theatre as well as the main branding above the chefs on the stage. It also allowed StF the ability to distribute materials to Food Hall visitors, which proved invaluable in distributing Delicious D&G and Flavour Fortnight programme of events.</p>

	<p>Working with the Cookery Theatre organiser and Scottish food advocate, all the opportunities were utilised with top chefs and producers working together to showcase D&G produce to the 160,000+ people who pass through the Food Hall.</p> <p>Industry & Partner Support: Businesses attending the Show were supported to maximise the D&G food and drink imprint at the Show, and Savour the Flavours worked closely with the local authority to support them in delivering a consistent food and drink message, to reinforce the branding work undertaken by Savour the Flavours.</p> <p>Flavour Fortnight was launched as well as an evening reception, in conjunction with the Presidents' Initiative, to showcase local produce.</p> <p>Marketing and publicity centred around maximising the impact of the highly visible presence at the Royal Highland Show including; Branding in banner stands, logos on graphic panels, AV screen photo montage.</p> <p>Public Relations: Landward, RHS review magazine, editorial in Edinburgh lifestyle titles and a focus on photo capture to generate post-event coverage.</p>
<p>Develop and deliver food tourism campaign in conjunction with partner organisations</p>	<p>A new 'mini food festival' called Flavour Taster was developed in May 2012 and additional external funding was secured from the South of Scotland Business Competitiveness Project. Whilst this event is separate to the Savour the Flavours II project, it is supporting the continued development of the project, creating a new Spring food tourism product and enabling food tourism marketing early in the season.</p> <p>Following consultation with members, who were really pushing us to organise a Flavour Taster in May 2013, we ran with it, with very little budget and focused advertising mainly through social media. We felt it appropriate for D&G to host this event again this year to promote as part of our food tourism campaign, packaging some of the best of the Flavour Fortnight experiences into a spring time mini food festival, and putting D&G on the map as well as keeping the momentum of our food festivals going both for participants and visitors alike.</p> <p>Two seasonal Christmas campaigns were run during the project 'Very Merry D&G Christmas' in 2011 and a 12 days of Christmas campaign in 2012. Both sought to deliver D&G food and drink messages to both local people and tourism audiences.</p> <p>Flavour Fortnight 2011 & 2012 were also significant food tourism campaigns, although they did not sit within the funding of this current project.</p>
<p>Attend and support business attendance at one major food event (Good Food Show or Speciality Food Show)</p>	<p>Following consultation with members and industry partners internal business to business events were developed and implemented as they were deemed likely to have a more significant impact on the stakeholders than an event external to D&G. The Recipe for Success workshops and Meet the Producer event replaced attendance at a food event external to D&G.</p> <p>The events reflected the identified need to increase use and visibility of local food & drink within the hospitality sector and to facilitate new partnerships between producers and end users.</p>

Other activities supported by StF over the programme period are summarised below.

International Green Week, Berlin

StF represented Scotland on the EU stand at International Green Week in 2013 to demonstrate an exemplar model of Rural Development. This provided sampling opportunities for multiple D&G food and drink producers.

StF was joined in Berlin by Waulkmill Cider as an example of a business who has benefitted from StF support. As a result of attending the event Waulkmill Cider secured their first export order. The project was also supported by a German national who took part in several Flavour Fortnight events during a holiday in the region.

Sharing Best Practice

SAOS have been focusing a considerable amount of time on collaborative supply chains and as part of their project they were keen to develop some case studies to highlight where a partnership approach has been adopted to improve the sustainability of a supply chain. StF was recognised as an excellent model of how this can be achieved and as a result a case study was created. A further case study of StF is included in the Rural Scotland in Focus 2012 carried out by SAC Rural Development Consultative Committee.

Responding to Industry Issues

A Neigh Horse Meat Here campaign was agreed in response to extensive media coverage of the horse meat scandal nationally. The goal of the campaign was to use a humorous headline to grab attention in order to highlight the quality of locally sourced meat, easy steps to take to identify locally produced meat and the excellent traceability within the Scottish meat industry which gives enormous reassurance to consumers at a time when customer trust in the processed food sector was at an all time low. A poster and leaflet campaign was launched, supported by social media which generated huge interest in the campaign with social media outstripping printed media as the primary means of communication for this campaign.

Partnership Working

Meetings have taken place with numerous organisations including Spring Fling and Galloway and Southern Ayrshire Biosphere to look at possible future partnership working.

StF instigated a meeting with the public procurement managers of NHS Dumfries Infirmary and the Catering Development Officer of Dumfries & Galloway Council's Education

Department to explore the potential and the opportunities arising from working towards the Food For Life catering mark, the Soil Association Scotland's flagship programme to transform food culture in Scotland.

Sector Groups

StF was instrumental in setting up, and continuing to support, several spin off groups:

- Chefs' Association
- Farmers' Market Marketing Programme, led by DGFCMA
- School Pilot Programme
- Deliciously Good Food Group
- Catered4 Project

In order to gain an understanding and appreciation of the various sub-projects overseen by StF in the 2011 – 2013 programme a series of consultations were undertaken with key personnel within each project. Each interview was structured to gain views on the following key topic areas:

- Level of involvement with StF
- Views on the benefits of StF
- Views on the future development and focus for StF

Chefs' Association

Level of Involvement

One of the key aims of the 2011 – 2013 StF programme was to establish a Chefs' Association, and this was achieved early in the programme period. StF facilitated the establishment of the group by contacting all known chefs to garner their views and support. StF also chaired the first informal session in 2011. The association has been an immediate success and all monthly meetings have been well attended and are held across a number of different locations.

The association is targeting a number of specific areas for development and consideration, such as training and skills, school education, supply chain and events.

It was noted by all respondents that the Chefs' Association would not have been established without StF. StF continue to support the ongoing development of the Chefs' Association. The Chefs' Association works with other StF projects including Catered4 and the Schools Pilot Programme.

Key Benefits

The association is still new and is only approaching its first year anniversary but many activities have been developed to address known barriers. These have largely focused on two main strands, firstly, the key issue of skills and training and secondly the importance of promoting high quality local food on local menus.

Training and skills development is vital to the industry's continued growth and the Chefs' Association has created a sub-group to foster and lobby for accredited support, including links to schools, charities, Modern Apprenticeships and SQAs, as well as the Scottish Federation of Chefs and the Chefs Guild. The training angle is critical due to the lack of formal training accreditation and facilities in the region and there is a risk that future delivery may be hindered due to a lack of suitably qualified chefs.

It is in this area where debate, pilot projects and lobbying has taken place across a number of forums to develop a model(s) which encourages people into the sector as well as training existing personnel. There are a number of examples of existing good practice, such as the Schools Programme (outlined below) and specific training courses and accreditation linked to Springboard, Future Skills, Modern Apprenticeships, Chefs Guild and the Scottish Federation of Chefs. Importantly, the Chefs' Association has enabled a coordinated response to this issue rather than a number of bodies trying to access support and funding. This was noted as a key benefit and is an ongoing area of development and StF is involved in these discussions.

Secondly, the Chefs' Association continues to promote local produce and this has been achieved through a number of initiatives and emerging ideas. These have included the development of an online web forum which allows chefs and cooks, both members and non-members of the Association, to exchange ideas and facilitate networking opportunities linking producers/suppliers with end users. This has also helped the supply chain in terms of deliveries and co-ordinating shared deliveries from certain producers and groups of producers.

The Chefs' Association and StF has worked effectively together to promote local food through links with other projects and events such as Meet the Producers, Farmers' Markets, events and demonstrations. More are planned and the association aims to continue to promote local food as continued education and awareness raising is required. A stand out success of the recent programme was the ability of StF, in partnership with the Chefs' Association, develop a strong presence at the 2012 Royal Highland Show. This was a huge success for the region's local food sector. StF as a co-ordinating body made this a success and is well placed to advise and co-ordinate on other regional, national and EU events.

As the Chefs' Association grows it was noted that they value the continued support of StF and continuing a strong relationship aids the Chefs in their quest to promote local produce across the whole region. The association is looking at ways to establish a local food accreditation scheme and StF is the perfect platform to market and promote this scheme. The Chefs' Association has a webpage link on the StF website.

Future Direction

It was noted that there remain hot and cold spots in terms of chef coverage and local food knowledge. The association is keen to grow in terms of members and this can be a challenge considering the scale of the region, but this remains an ongoing priority, as does the use of the virtual forum platform to exchange ideas and networking opportunities. The Chefs' Association meet across the region in order to ensure all chefs have access to the meetings.

Avoiding duplication and overlap by having one body to represent chefs has been critical to the success of emerging projects and will remain a vital role played by the Chefs' Association in the future. The Chefs' Association will continue to assess options for training and accreditation and this will require the assistance of StF in a lobby role.

In terms of other ideas and initiatives, the Chefs' Association would welcome the support of assessing the feasibility of a delivery co-op, as it was noted that in many cases the restriction of serving local food is related to the cost of getting the produce to the kitchens. Economies of scale suggest this may be relieved through a central delivery hub or co-op. Similarly, it was noted (as an aspiration) to have a central food hub which offered retail and training space for suppliers, end users and consumers alike. Although aspirational it was noted that a food hub could be the all encompassing investment to address the key issues of delivery, storage, training and a flagship development marketing the local larder.

This would also support the tourism ambition of the area as well as expanding the growing links with local schools. Again, this would require wide buy in and funding but StF is well placed to lead on this feasibility assessment.

The Chefs' Association aspires to be self sustaining and therefore require the ongoing support of StF, as StF is recognised as the champion of local food promotion and is seen as the central hub with numerous spokes. Much more has to be done to get more local food being served throughout local establishments and the growing cohort of chefs on the association suggest that this is travelling in the correct direction. As well as more local supplies it was noted that quality and consistency also needs to be monitored and ultimately accredited, and the chefs are keen to develop an accreditation scheme in order to oversee the credentials of local establishments. Again StF is well placed to support this ambition.

Farmers' Market Marketing Programme (DGFMCMA)

Level of Involvement

During the current programme period StF was instrumental in assisting the now constituted Dumfries and Galloway Farmers' & Community Markets Association (DGFCMA) put forward a successful application to LEADER for a separate project to further assist six of the farmers' markets with a marketing and development programme. This programme attracted its own funding and therefore StF played a leverage role in (1) helping establish a new Farmers' Market body (2) devise a marketing and development programme and (3) attract additional funding.

StF can be noted as leading the formation of the DGFCMA and the sub group formed by six markets to pursue the marketing project funded by LEADER. StF continues to work closely with the DGFCMA and individual markets to support and promote local Farmers Markets. This recently included speakers and break-out groups at the recent AGM, much of which focusing on business development opportunities. The group also continue to access support and workshops related to marketing and social media led by StF.

Key Benefits

StF initiated the establishment of the DGFCMA, without StF the association would not have been formed and the individual markets would have remained as small independent markets. There was an initial hesitance to form as a collective group as certain members and markets felt that the markets were competing but StF facilitated the discussion and ultimately it was agreed that the markets were better as a collective unit. This helped the association to make funding applications, co-ordinate marketing, share resources and exchanges ideas and develop networks. The collective strength of the markets has been validated.

StF facilitated all the initial and ongoing meetings and continue to support the association and individual markets in their marketing campaigns across a number of media outlets. StF also facilitated the creation and production of the 'black leaflet' which is the only printed information which gives details of all the 11 Dumfries and Galloway Farmers' Markets. The StF website continues to provide the main marketing outlet and provides up to date details of all the markets and features them in the events page of the website, which is seen as the key reference for most market customers.

The new DGFMCMA has also given famers' market organisers the chance to network and has resulted in many working together in numerous ways including production of marketing material for famers' markets. This has also resulted in an exchange of 'best practise' which has made the running of markets easier and more manageable in many ways. StF assistance has helped DGFCMA to promote and support small businesses which has added to the number of small food producers wanting to come to the markets. Raising awareness of the benefits of local food and of farmers' markets to the local economy has been a key benefit from StF and in turn this has increased the number of customers, markets and benefiting businesses.

It was noted that StF 'thinks outside the box' and combines genuine passion for the local food economy with a professional and well informed implementation of plans. Importantly as StF and the markets have evolved they have always kept the primary producers at the heart of their activities, which is vital to the continued growth of the markets.

It was also noted that Flavour Fortnight in 2011 helped to establish the Dumfries Farmers' Market, which is now seen as the pre-eminent local farmers' market. Publicity around the Flavour Fortnight, which was co-ordinated by StF, and the extra interest that was created in

local food led to an increase in footfall and sales at each of the September markets considerably, this led to increased footfall throughout the following year.

DGFCMA also noted that the effective running of Flavour Fortnight has promoted the profile of Dumfries and Galloway produce in and out of the region. Similarly the wider promotion of food and drink from Dumfries and Galloway at all levels and to all sectors of potential customers has provided tangible benefits to all participating businesses.

StF can bring a raft of benefits to the DGFCMA and this was further evidenced at the recent AGM where StF help bring a more proactive and dynamic AGM which included seminars, talks and break out groups. All of these information exchanges and networking opportunities would not exist in the absence of a StF.

Future Direction

Perhaps the main impact of the current programme has been StF's ability to set up a 2 year marketing project which has helped the markets grow and begin to become established, this has also resulted in obtaining strong branding for Dumfries and Galloway markets.

In terms of the DGFCMA, it was noted that the association would welcome support in looking at the next stage of the marketing and development programme once the current marketing project has ended. An evaluation of the programme would help inform how best to support and inform farmers' market organisers to ensure long term continuation of markets in the region.

Gaining longer term funding for the continuation of the market development programme would introduce stability and allow concentration on the job in hand and longer term funding - particularly important with 2014 so close with so many opportunities available. These would be difficult to access for individual small producers but a vehicle like StF has and can make an enormous difference.

It was also felt that there was scope to work closer with the public sector as public sector procurement practices can help raise awareness of good local food within the region and promoting the value for money that local food represents.

It was also noted that StF can play a role in supporting plans for further development of the Dumfries Farmers' Market, where StF could assist with plans to consider the feasibility of

establishing a second market a month on a new site more central to Dumfries Town Centre which would help revitalise the town centre.

School Pilot Programme

Level of Involvement

The School Pilot Programme had been discussed between StF and the Education Department for many years but came together as a pilot initiative across five schools in April 2012. The ultimate aim of the pilot is to assess the impact of 'providing added value on school courses, notably Home Economics and Hospitality and Practical Cooking'. StF was instrumental in developing the links between the Chefs (latterly the Chefs' Association) and the individual schools. A flexible approach has been allowed to develop to accommodate the requirements of each school and their chefs.

The co-ordinators of the School Pilot Programme noted that StF and the Chefs' Association have been invaluable to the delivery of Intermediate 2 Hospitality course across five schools in Dumfries and Galloway. Each school has had their own resident chef who has committed to a variety of difference courses and activities, ranging from a one off taster session to an afternoon a week to help develop practical, presentation and organisational skills in the kitchen. Each chef and school is open to agree their own programme of involvement as each location and chef has differing resource and requirements, this has worked well. Ultimately, the programme is designed to add value to the existing course and in certain cases has culminated in special projects such as catering for meetings, awards and prize giving's.

Key Benefits

The key benefits can be grouped into three main areas (1) skilling up on existing course work (2) confidence and life skills and (3) adding value to existing course work. The programme has been a huge success and the flexibility of the course ensures pupils benefit from something different but extremely meaningful at the same time.

There have been a number of teaching techniques used including whole class demos and individual input for those struggling with techniques and processes. Again, the programme is a pilot and therefore flexible enough to accommodate differing requirements at differing times. Being a pilot has enabled techniques and activities to be tested.

It was noted that pupils have enjoyed having another adult teaching them and in the words of an S6 pupil at Dalbeattie High School 'Tom has taught us so many things that Mrs Houston could never have taught us. He has added variety and challenge to each dish which has been offered. With Tom's input we have also managed to use more locally sourced ingredients when we have been catering for school events like the Music Soiree and Celebration afternoon'.

The Chefs' Association has also certificated all pupils who have worked with their chef and this has added more importance to the subject and gives them an additional string to their bow when looking for employment or further education and training. There are examples where pupils have expressed an interest in working in the hospitality sector and there is scope for the Chefs' Association to assist to locate suitable work placements as well as funding for accredited training.

There are also examples where schools have teamed up with restaurants and hotels and this has given pupils a real insight into the hospitality industry. There are also numerous practical and real life examples where pupils and the chefs have planned and provided for an actual school event.

It was noted that StF were always on hand to help with new course development and have helped schools find materials for sustainability, food miles etc. Similarly, it was noted that nothing has been too much bother and all respondents noted that they look forward to a continued partnership with both StF and the Chefs Association for many years to come.

Future Direction

The initial pilot is coming to an end, and there are numerous end of year dinners and celebrations which are to benefit from the School Pilot Programme in terms of internal catering. A meeting is to be held amongst all participating schools, StF and the Chefs' Association to evaluate its impact and to discuss the future roll out of the programme.

There have been a number of discussions about informal accreditation and it was noted that StF will continue to play a key lobbying and operational role in developing the next phase of the Schools Programme.

In terms of a specific project, Dalbeattie High School is going to be rebuilt in the next year and the Chefs' Association has backed and is fully supportive of there being a professional

kitchen in the plans and have written to the Director of Education to support this initiative. There are also proposals to record demos and activities in order that an electronic library can be established so all schools have electronic access to a virtual database, this will aid those schools which may be unable to secure a chef resource on a regular basis.

Deliciously Good Food Group

Level of Involvement

The Deliciously Good Food Group (DGFG) was a private sector led group which was supported by StF. The event ready group was established to enhance the chances of attending large events to sell and promote Dumfries and Galloway produce. Initially established by A Taste of Galloway, DGFG is a group of farmers, producers and a hospitality business who collaboratively champion D&G food at local and national events via high quality event catering, providing an innovative alternative to standard event catering fare. StF play a key role in facilitating partnership work to promote the group through DGC, SAC, SAOS and SFD.

Key Benefits

Although originally a private sector led initiative the DGFG has benefited greatly from its relationship with StF. DGFG does not require to be associated with StF but it does so because of the benefits it brings to their operation. The benefits include networking opportunities, relationship building across a wide variety of public and private organisations and the ability to lobby and provide support for the group.

It was noted that StF helps to make connections and can unlock difficult situations, such as the recent Annan Pipe Band Championships where the original event catering function was procured to a firm outside the region and StF managed to get this changed so DGFG could be in attendance. StF has also aided DGFG attract funding and support and assisted them in their wider Scottish co-operative plans linking up with SAOS to forge links with similar projects in Argyll and Perthshire. StF also signposted DGFG to SAOS who is currently assisting them with their cooperative aspirations.

DGFG welcome the support provided by StF and it has aided them greatly in their growth and development. They may have developed under their own steam but StF support has resulted in things happening quicker and to a greater extent. Essentially, StF has helped 'oil

the wheels' and helped the group develop new ideas and opportunities. Their lobbying role was noted as key benefit. It was also noted that many firms do not have the time nor the resource to lobby and StF are well placed and respected to undertake this task, they are also seen as independent and can therefore ask questions which the group cannot.

Future Direction

DGFG would like to see more of StF at events and shows, and to see StF do more marketing at events rather than rely on their own events and virtual presence.

DGFG don't see the need for much change and noted the first 4 years of StF may have been difficult but they feel they are now making a difference and it would be foolish to stop funding now. Benefits are beginning to accrue and it may take up to 10 years to be seen as a complete success, now is not the time to stop. It was felt that StF has now found its feet and is returning tangible results in a number of different ways. It was felt that more resource should be deployed to the StF, notably an assistant project manager to lighten the burden on the project manager.

Catered4 Project

Level of Involvement

The Catered4 project was established by StF on the back of numerous businesses enquiring about special diet requirements for coeliac, vegans, vegetarian and diabetic diets. Originally StF emailed a wide selection of local businesses and organisations to gain a view on the value of establishing a group to assess the scale and requirements of this market opportunity. It was made clear, at a subsequent meeting with Coeliac UK, that this sector was of growing importance and serious consideration should be made at the earliest possible opportunity to assess its implications in a Dumfries and Galloway context.

An informal group was brought together in 2012 and StF developed a programme of workshops in late 2012 to present more information and detail on this market opportunity. Coeliac UK made an initial presentation to outline more about special diets and menus and this was very valuable and StF played a role in developing a series of workshops. This group was linked to the Chefs' Association as many chefs, as well as owners and other caterers, were keen to find out more about this growing market.

Key Benefits

StF helped formulate and crystallise the opportunity and were pivotal in responding to local business queries and bringing together a series of information workshops and break out groups with Coeliac UK. The initial phase has been focused on education and raising awareness about special diets and their link to health, wellbeing and disease management.

The events were very well attended with 30 participants at each session as they provided hands on and practical advice, it was very much a learning by doing series of events. StF was key in spreading the word and they offered a powerful outreach and marketing resource to the wider region. The events were at full capacity and there continues to be much discussion and dialogue about catering for special diets. StF has helped the Catered4 group to become formally constituted and the aim of the group is to market the region as a coeliac friendly region. Coeliac UK has their own accreditation programme and the aim is to support as many businesses as possible to become, and remain, accredited but much more learning and education is required to achieve this aim.

StF helped to create, support and operate this opportunity. They were noted as a vital resource. StF also arranged venues and speakers.

Dumfries and Galloway aims to be at the forefront of this market opportunity and therefore having a formal body will be critical to its success. StF has helped put Dumfries and Galloway on the map in terms of local food, food events and markets, but this opportunity can act as a further layer on an already well established set of achievements.

Future Direction

There are already signs of progress and more businesses are becoming accredited and others are keen to find out more. It is therefore important the StF continue to work with Catered4 and other sub-projects to encourage more information exchange, knowledge transfer and networking opportunities to ensure the ambition of the region becoming recognised as a coeliac friendly region is achieved.

Although now a constituted group, Catered4 is keen to be an arm of the StF body as this provides them with a wider network and links to other partners and project as well as an overseeing body.

StF has been a huge success, 9 years ago everyone in Dumfries and Galloway looked elsewhere for local food promotion and awareness, now increasingly other people from outside the region are looking at Dumfries and Galloway for advice, ideas and direction.

Summary

This section has summarised the activities and status of the key activities that were led by StF over the past two years. It is clear that progress has been made on many activities, in particular the development of five new projects, of which four are now established as independent constituted bodies, and a pilot project which looks like becoming a full project rolled out across the region.

The success cannot be undervalued as 4 new bodies are now up and running and presenting real impacts within their area of expertise. Each project also has a clear vision for the future and what needs to be agreed and addressed in the short, medium and long term. An exceptional impact has been the cross working between the projects and this must be admired in the short space of time they have been operational.

There is a genuine feeling of collective responsibility and StF is a critical element of their success and continued operation. Their involvement has been frontloaded but it is important that they retain a close working relationship and continue to support the cross working of each project. If one project is to be supported in more detail it would be the schools project which is on the cusp of receiving full project status.

Case Study 2



The third hosting of Flavour Fortnight in 2012 was made up of 101 local events, greater than the 92 hosted in 2011 and the 47 hosted in 2010. All the Flavour Fortnight events were hosted by members of Savour the Flavours with each event focusing on the promotion of quality local food and drink.

The independent evaluation found that seven out of ten firms which participated in a Flavour Fortnight event realised an increase in their trading position, in some cases this was as much as £10,000 per event - with a median value of £300 per business. This was 66% higher than the figure quoted in 2011 (£180) and provided further proof that food and drink events deliver financial benefits to participating companies. Overall, the estimated direct financial impact across all participating businesses was estimated to be in the region of £52,080 – a 72% increase on 2011.

In terms of the visitor profile, the following table summarises key performance metrics for 2012 and compares them against 2011 results.

Indicator	2011	2012	Change
Visitor Numbers	10,000	11,413	+14%
Visitors attending an area purely for an event	25%	32%	+7%
Visitors not from the D&G region	50%	60%	+10%
Visitors staying overnight in D&G	18%	31%	+72%
Day visitors / Overnight Visitors Split	84% / 16%	67% / 33%	-17% / +17%
Visitor spend attributable to an event	£16,400	£82,338	+402%
Event 'Very Enjoyable'	69%	84%	+15%
Flavour Fortnight 'Excellent'	55%	64%	+9%
Overall Economic Impact	£193,689	£275,778	+42%

Overall the independent evaluation highlighted that there was a direct financial impact to businesses as a result of (1) trading during the festival and (2) future trading opportunities. In total this was estimated to be around £193,440, which was 9% greater than 2011. There were also additional indirect benefits associated with specific overnight trips to events, the value of which was estimated to be around £82,338.

In total Flavour Fortnight 2012 helped generate in the region of £275,778 (a 42% increase on 2011), which when measured against the value of the public sector support (£20,000) represents a return of investment of £1:£14.

4 Business Survey Results

Introduction

An online survey of businesses and organisations on the StF contacts database was undertaken to ascertain views of the role and impact of StF over the period 2011 to 2013.

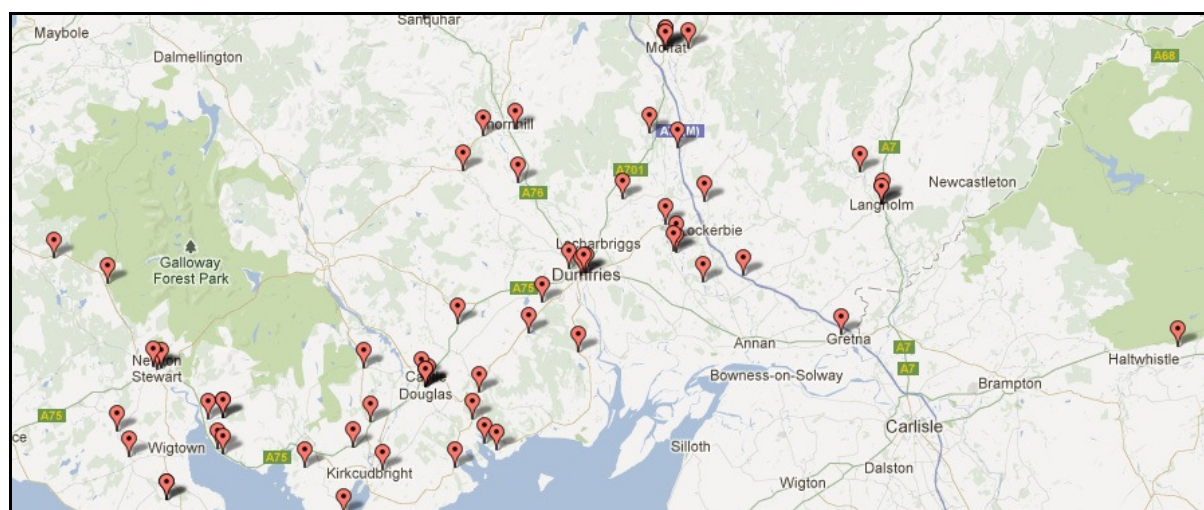
For the evaluation of the StF project approximately 160 e-mails were circulated throughout the StF contacts database of which 71 went on to complete the on-line survey.

Surveys sent to client database: 160
Completed surveys: 71
Response rate: 44.4%

The total of 71 responses represented a 44.4% response rate which would be considered a very high response rate against the average market research standard of 25 - 30%.

The geographical spread of the respondents was from across the Dumfries & Galloway region and the location of each response is shown in the map below:

Figure 1: Location of Responding Businesses



This indicates that there was a good spread of responses from across the region and the responses were not focused on any one particular sub-region. There was one additional response from a Glasgow postcode which is not shown in the map.

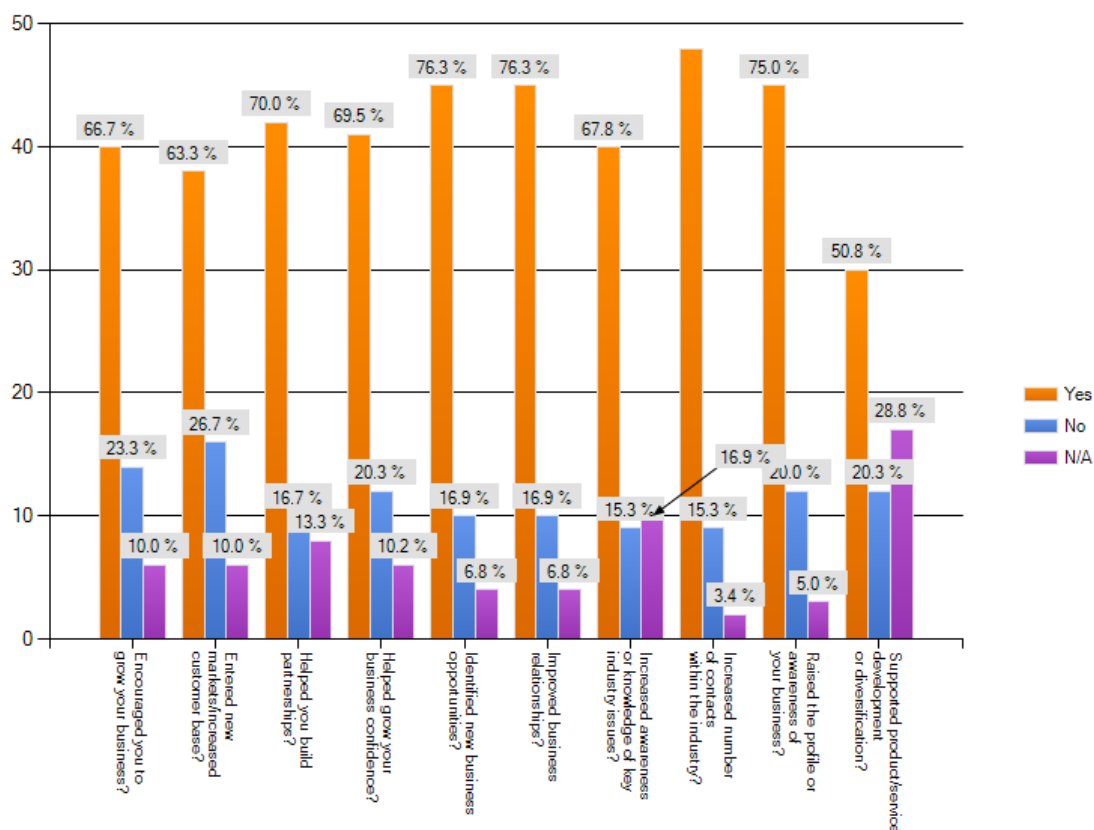
Savour the Flavours 2011 – 13

The survey asked what benefit has being part of StF had on their business over the past two years. The responses indicated that significant benefits were recorded in the following areas;

- Encouraged you to grow your business?
- Entered new markets/increased customer base?
- Helped you build partnerships?
- Helped grow your business confidence?
- Identified new business opportunities?
- Improved business relationships?
- Increased awareness or knowledge of key industry issues?
- Increased number of contacts within the industry?
- Raised the profile or awareness of your business?
- Supported product/service development or diversification?

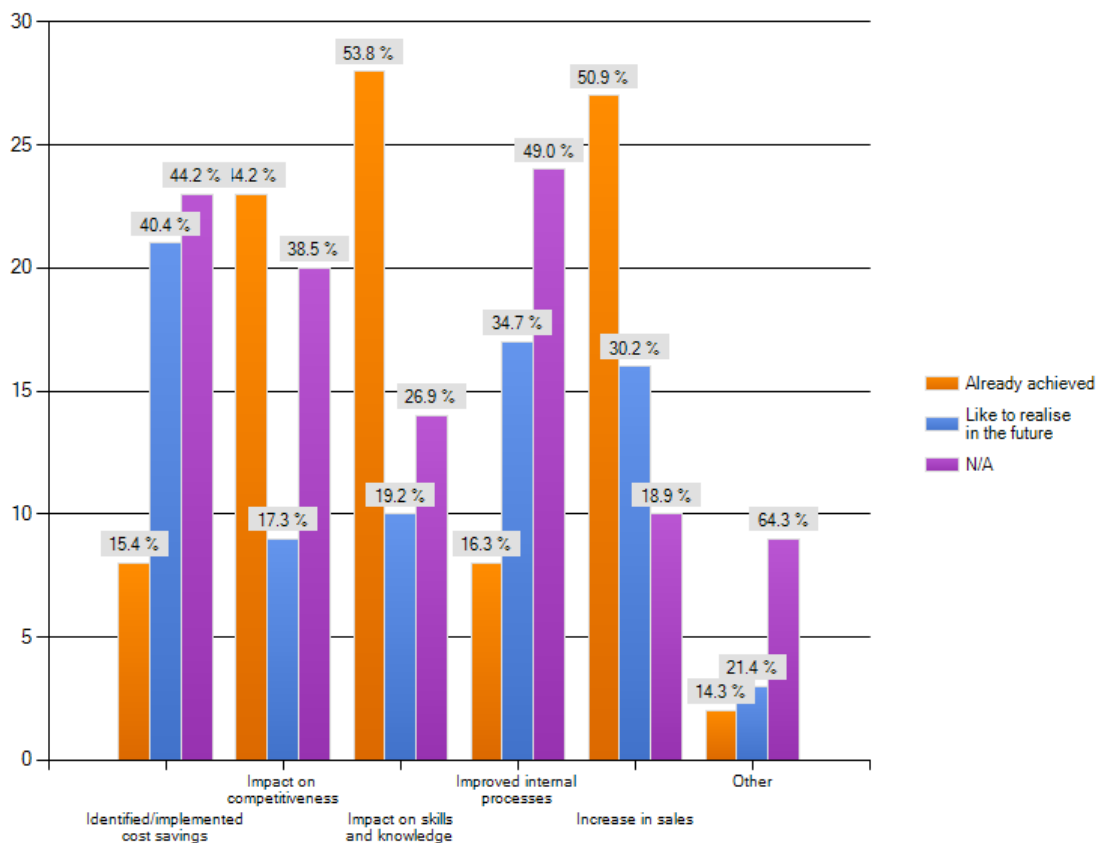
Figure 2 indicates the level of responses and highlights the positive benefits businesses associate with being part of StF. The most quoted responses were related to networking and relationships as well as identifying new opportunities and raising the profile of individual businesses. A less quoted response was related to supporting businesses develop or diversify.

Figure 2: Benefits of being part of Savour the Flavours



Businesses participating in the survey were asked what outcomes their business had experienced or is likely to experience that can directly be attributed to their involvement with StF. A significant number of businesses noted that they had already achieved positive impacts on skills development and knowledge; other areas of note included increased sales directly through their involvement with StF and a positive impact on business competitiveness.

Figure 3: Outcomes businesses have experienced or likely to experience



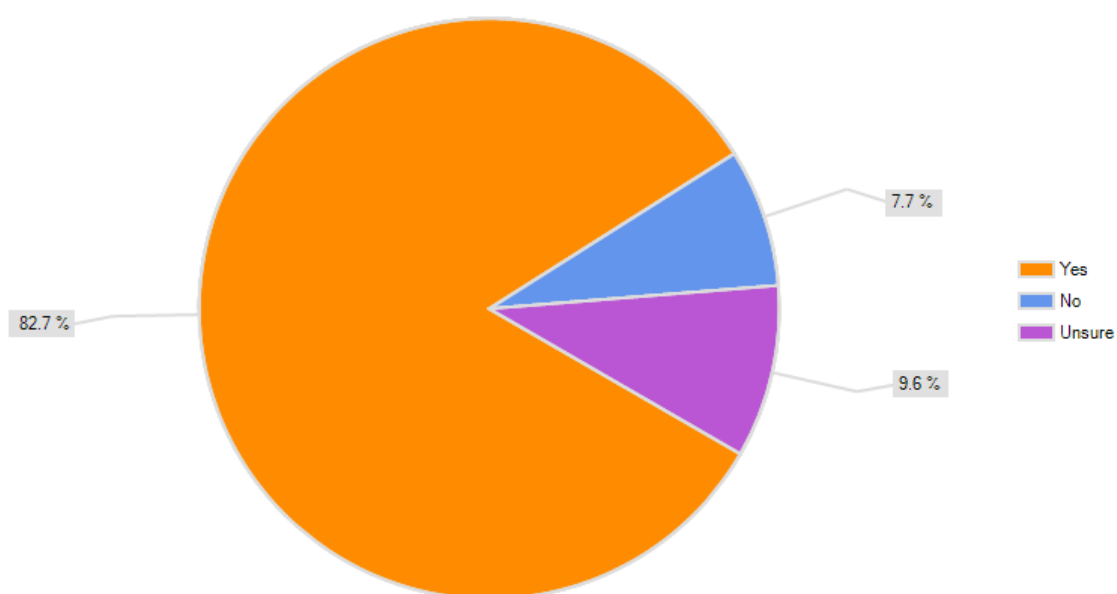
Although these are direct impacts there were also a number of respondents indicating additional impacts not yet experienced but impacts likely to be experienced. Notably this included longer term benefits related to improvement on internal processes and procedures as well as possible cost savings.

It is clear to see that businesses have continued to benefit from short term measures related to skills and sales improvement but continue to benefit from longer profitability related benefits accrued from StF such as efficiency savings and productivity gains.

Examples of other benefits included; improved profile, StF website as an essential point of contact with customers and a realisation of a product which makes business more unique.

Respondents were asked if participating in StF over the past two years had directly benefited their business. The figure below illustrates that almost 83% of businesses noted that their business had directly benefited from its association with StF; this was greater than the 76% quoted in the 2011 survey.

Figure 4: Has participation in the Savour the Flavours benefited your business?



It can be drawn from this response that businesses have benefited at an even greater level in the past two years than in previous StF programme periods.

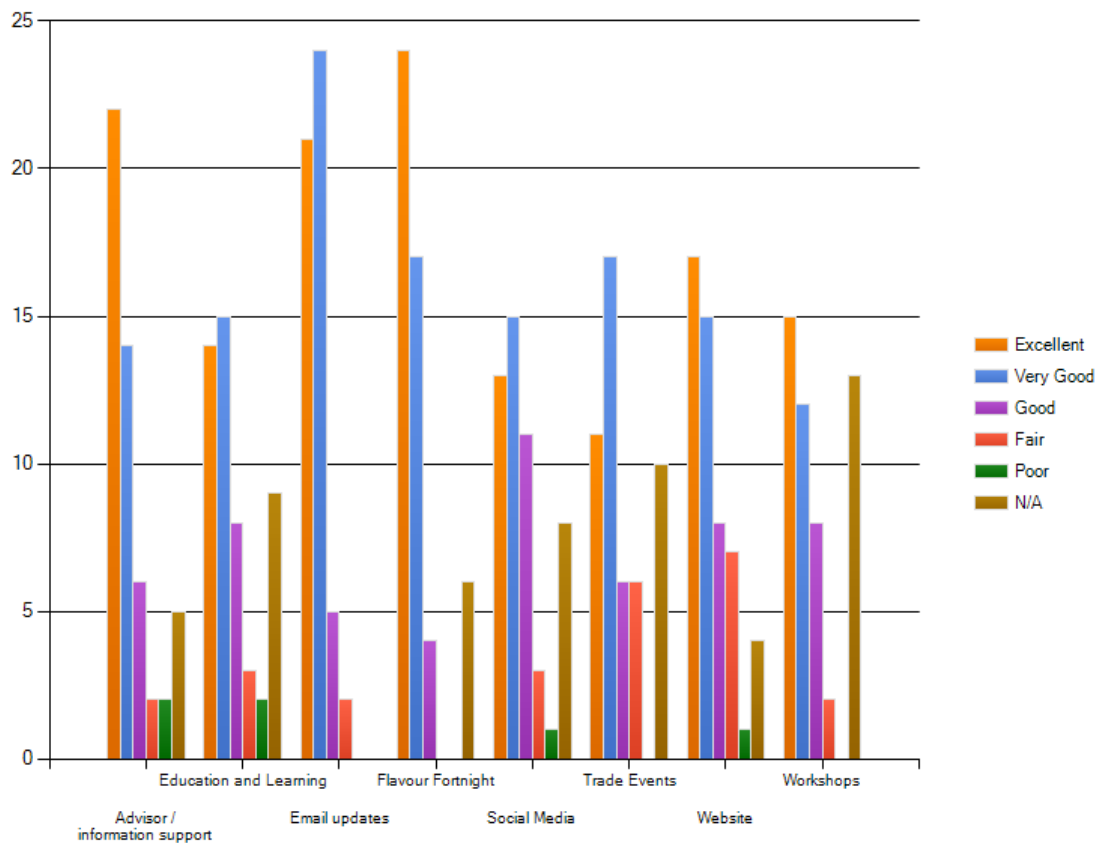
A selection of comments provided by survey participants are provided below.

Table 1: Summary of Business Benefits of being associated with StF

<i>Networking, learning of new suppliers, new skills</i>
<i>Increased my industry awareness, my confidence in developing new products and markets, helped get my brand recognised via local press</i>
<i>Raises the profile of local food and drink for all involved</i>
<i>They have helped with event ideas and marketing. They have introduced me to new local suppliers, improving the quality and traceability of ingredients on my menu, something many customers look for.</i>
<i>Marketing/finance/networking</i>
<i>Giving people knowledge of local produce</i>
<i>As mentioned above Flavour fortnight, Meet the Buyer and all online support and opportunities make it a brilliant project run by a fab team</i>
<i>They help me to discard ideas that with their experience won't work locally. They never discourage me, just inform me of what has been the experience so far. This is fantastic when you are just starting a business.</i>
<i>Helped focus my business intentions.</i>
<i>The publicity I have received when taking part in events. This has been a form of free advertising for my business and advertising is expensive. Also they have stressed to the general public how important it is to eat from "farm to fork" and use local suppliers.</i>
<i>Many guests from outside the region are pleased to see that we offer local produce.</i>
<i>I have gained many customers and opportunities for collaborative working from StF events</i>
<i>It will have had a small positive benefit, but not major.</i>
<i>As a result of exposure at events in the past I am now a supplier to a number of major customers in the region including Castle MacLellan and the Gretna Green outlet.</i>
<i>Made me feel informed in terms of emails and marketing</i>
<i>I was trying to do this on my own 4 years ago - running around trying to find local suppliers and was so relieved when I heard that someone was going to pull all the producers together, it could be taken to a new level by including everything that Dumfries & Galloway produces locally, not just food!</i>
<i>We have met new producers, then engaged in business to expand our retail offering and they have in turn promoted their products on site.</i>
<i>Get to know information up front & be able to network with other businesses</i>
<i>Very difficult to have tangible results but it would be better to build on the programme and not lose it.</i>
<i>StF seems more for people selling at farmers markets and small direct sales. We supply mainly to hotels and restaurants and don't seem to fit with what StF are about.</i>
<i>It has raised awareness of food producers in the area that I can partner up with to use and sell their products</i>
<i>Marginally - yes. Purely for the handful or so additional eaters during flavour fortnight</i>

Survey respondents were asked to rate certain aspects of StF over the period 2011 to 2013. Figure 5 illustrates the responses.

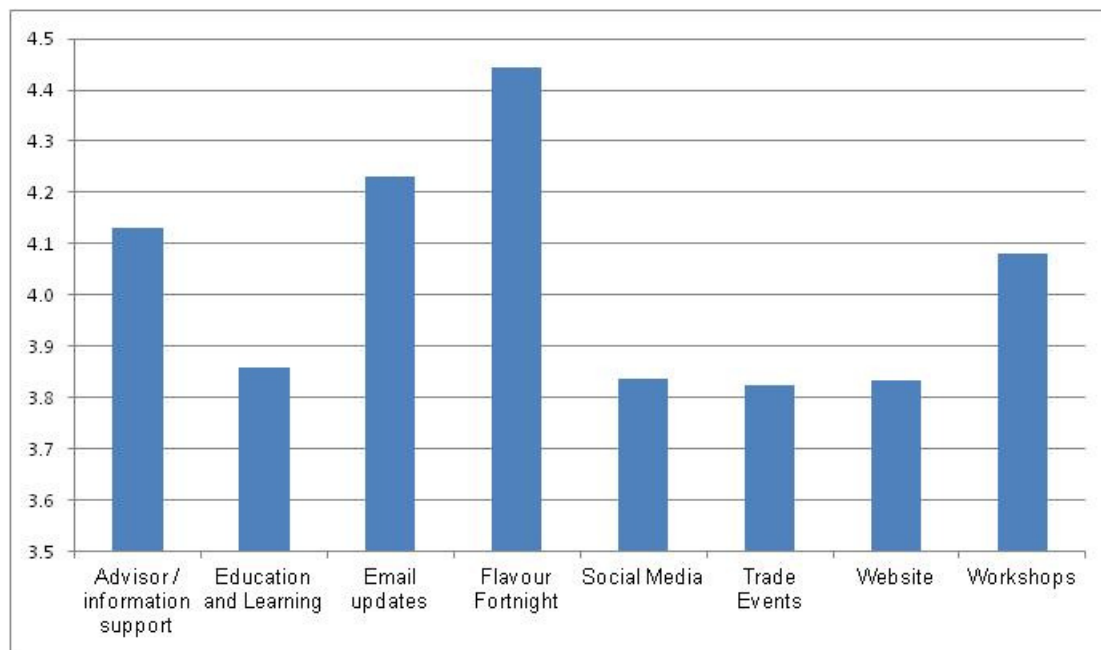
Figure 5: Rating of current Savour the Flavours activities



The figure above indicates that Flavour Fortnight was recognised as the highest rated activity in the past two years. Advisor support and email updates as well as the website were also ranked highly. Although events, email updates and the website were also noted highly in the 2011 survey, advisor support was not, this suggests that delivery of advisor/business support has been more marked and rated in the recent programme period.

The average ratings of the activities is shown in Figure 6 and confirms the high rating attached to the Flavour Fortnight event, email updates and advisor support. Social media, website and trade event average scores were slightly lower but were still close to a 'very good' (4) rating.

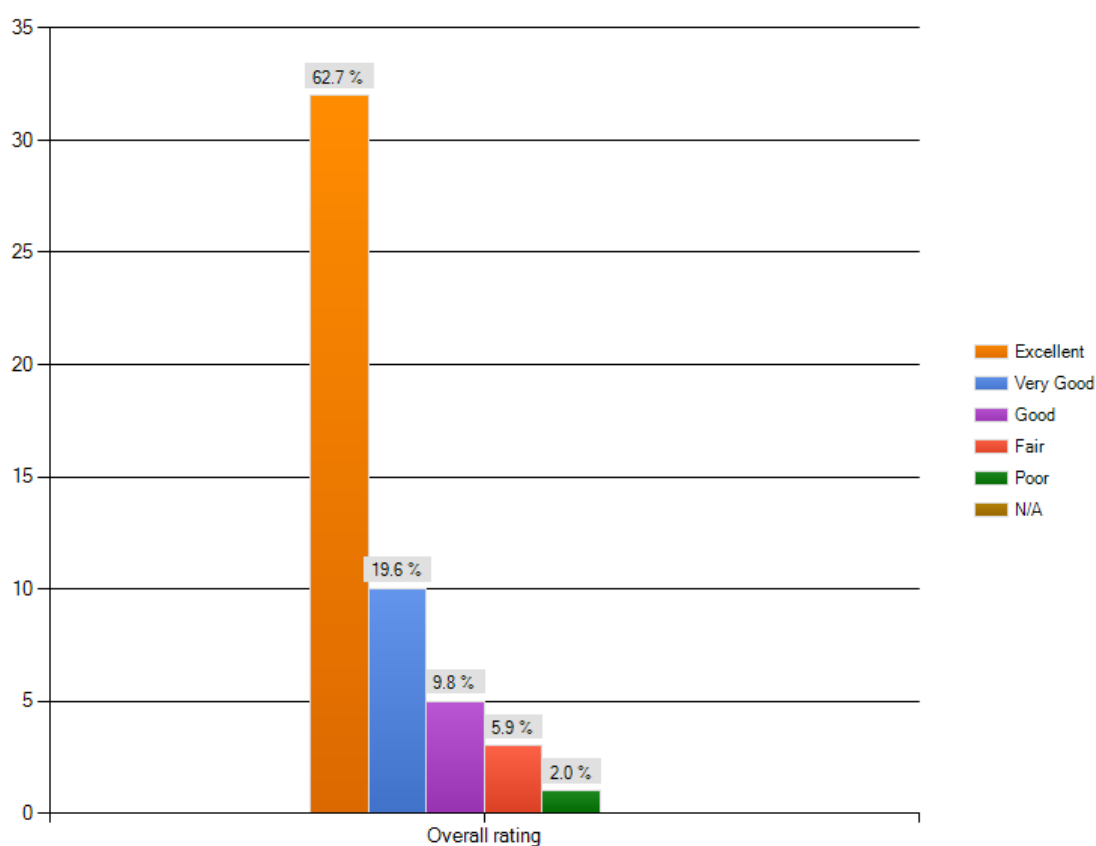
Figure 6: Average rating of current activities



Survey respondents were asked to provide an overall rating of StF rating for the period 2011 - 2013. The rating on a scale of 1 to 5 (1 very unimportant to 5 very important) averaged 4.4, therefore falling within the very good scale. This was considerably higher than the 4.0 achieved in the 2011 survey.

Figure 7 highlights the break down of responses and highlights that 63% of the survey sample rated StF as 'excellent', this compares to 33% in the 2011 survey. This confirms that StF has continued to improve and provide real value for members and those associated with its activities. The increase in satisfaction is significant and StF should be applauded for its role in supporting food and drink businesses in Dumfries and Galloway.

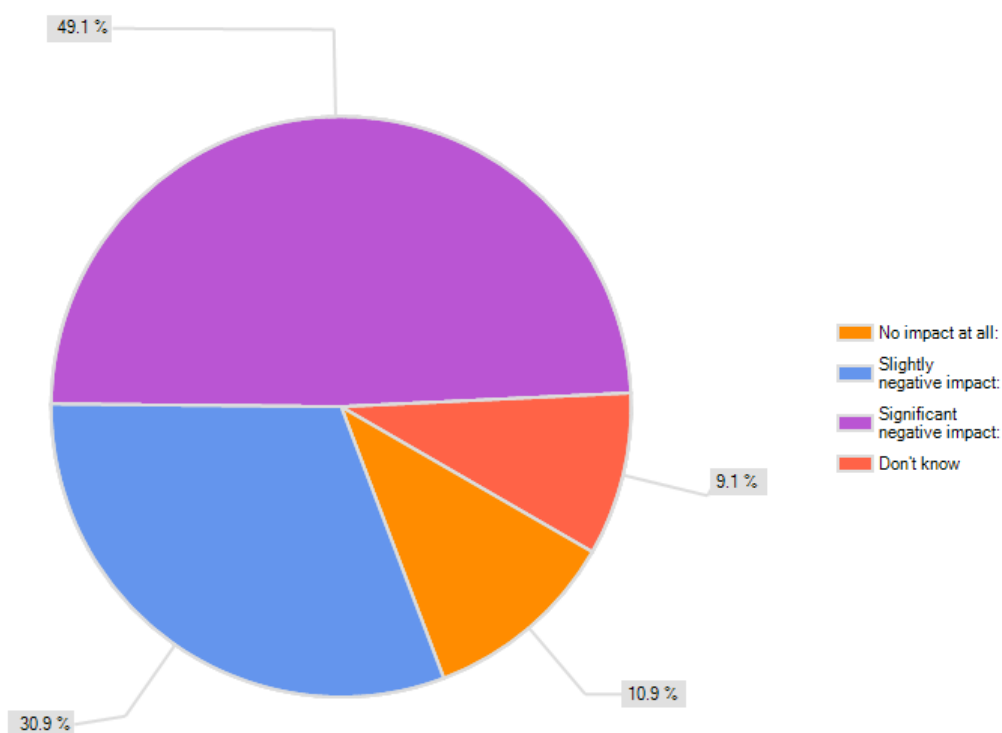
Figure 7: Overall rating of StF



When survey participants were questioned on the impact on their businesses if Savour the Flavours ceased, the response is shown in Figure 8. This notes that almost half (49.1%) of respondents would notice a significant negative impact on their business if StF was to cease, this compares to a lower proportion (33.9%) in 2011. Only 10.9% of respondent stated that the closure of StF would have no impact on their business, this is lower than the 19.6% of business in 2011. Overall, it can be drawn from this finding that StF is more important now than it was two years ago.

A further 30.9% noted that their business would notice a slightly negative impact. This equates to a total of 80% of respondents stating that their business would be negatively impacted by the cessation of Savour the Flavours.

Figure 8: Business impact of Savour the Flavours stopping



Savour the Flavours: Economic Impact

It is clear from a number of responses that StF is highly regarded by those responding to the business survey. 83% of responding businesses noted StF having a positive impact on their business and more than 8 out of 10 firms noted its performance as 'very-high' or 'excellent'. In addition there is evidence highlighting that StF has had a continued positive financial impact on participating businesses. The key financial headlines are summarised below:

- A key outcome realised by 25 respondents was the direct role Savour the Flavours has in increasing sales and therefore turnover. Of these 25 businesses, 18 were able to estimate the financial impact of Savour the Flavours, this totalled £88,500 pa
- 20 firms had witnessed a financial impact through skills development, of which seven estimated total financial benefits of £23,100 pa
- 18 firms had managed to secure cost savings as a result of Savour the Flavours support, of which seven estimated total financial benefits totalling £16,250 pa
- 17 firms noted that Savour the Flavours had a direct role in improving internal process, of which four estimated total financial benefits of £7,065 pa
- 19 firms indicated that Savour the Flavours had a direct impact on improving their competitiveness, of which seven recorded a total financial impact of £18,730 pa

In total 19 individual member businesses (*note, a number of firms recorded financial impact across a number of subject areas*), or 28% of total respondents, were able to present the direct financial impact of Savour the Flavours activities and support. It should be noted that other businesses highlighted that direct benefit had accrued but these could not be computed, including for example:

- *Awareness of other local food businesses and routes to market '15% of turnover'*
- *Better knowledge of Coeliac requirements*
- *Awareness of local competitors shortcomings*
- *Promotional value*

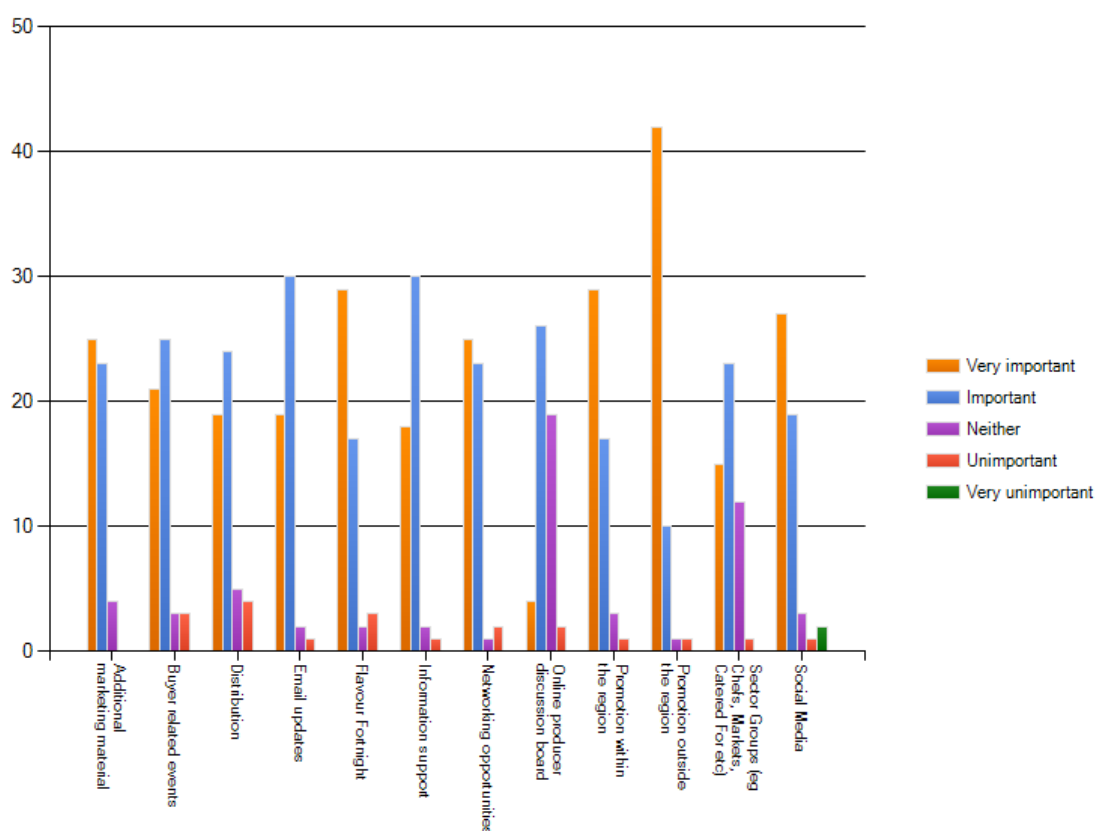
The findings from the survey suggest the total direct financial impact of Savour the Flavours was in the region of £155k per annum. This equates to a median financial impact of £3,000 per business per annum (£2,000 in 2011). Assuming 28% of all members (45) recorded a similar median financial benefit, the total financial impact would be around £135,000 per annum (£100,000 in 2011).

These are broad and conservative economic impacts as a number of businesses were unable to put a figure on the financial impact and a significant proportion of businesses noted that they expected financial impacts to accrue in the future. In terms of a broad cost: benefit assessment it can be summarised that even at this early stage the direct financial benefits outweigh the costs of funding the organisation. This assessment pays particular focus to the direct financial impact, which is only one measure in which the effectiveness and efficiency of Savour the Flavours can be measured.

Savour the Flavours: The future

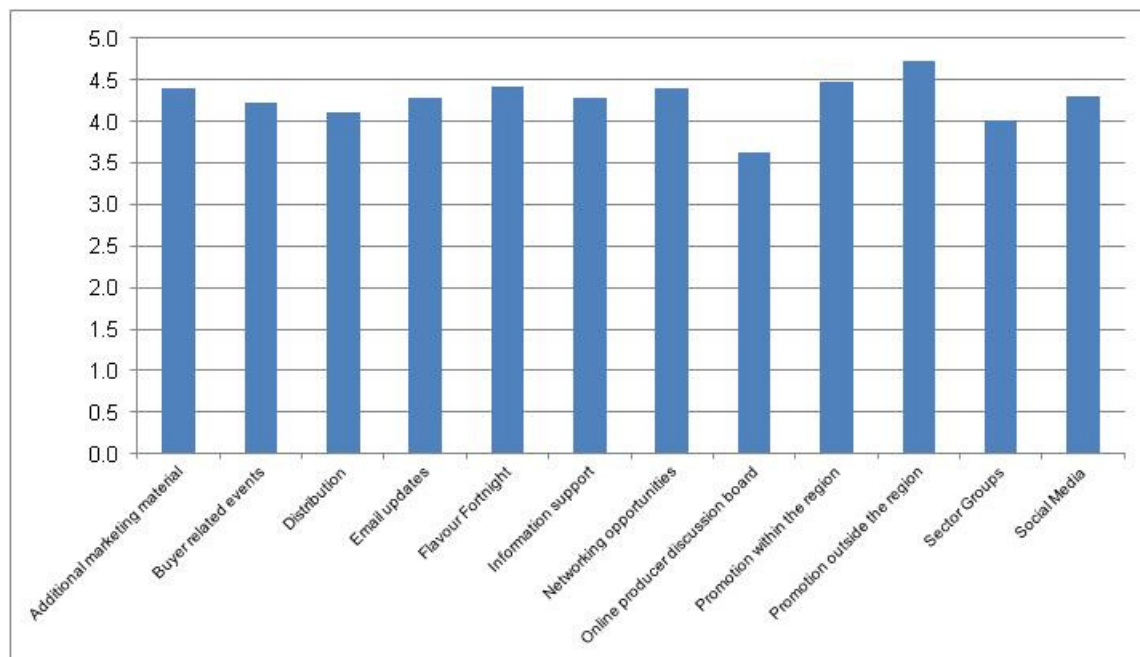
Survey respondents were questioned on how important a selected range of activities were in relation to the future development of StF. Figure 9 indicates the rating of the activities and indicates that 'promotion outside the region' was by far the highest ranking future activity for future delivery.

Figure 9: Rating of activities in the future development of Savour the Flavours



Respondents were asked to rate the activities on a scale of 1 to 5 (1 very unimportant to 5 very important). The average ratings of the activities suggests promotion within and out with the region, networking opportunities, Flavour Fortnight and information support were areas respondents would rate as the most relevant to the future development of StF.

Figure 10: Average rating of activities



Survey respondents were asked how Savour the Flavours could be improved. Many respondents believed the organisation was working effectively and minimal change was necessary, some key suggestions are listed below;

Table 2: Summary of Business Benefits of being associated with StF

<i>This is running very well and it just needs to keep up momentum and not spread itself to widely</i>
<i>Increased National event participation such as RHS subsidised collective stall</i>
<i>The quality of staff are tremendous and should be retained</i>
<i>Better funding, to ease the workload on key members</i>
<i>I think it has been very beneficial for small producers selling within the region so now it's worth considering the wider market outside..</i>
<i>Give them more time/resources to really maximise awareness</i>
<i>I've found Savour the Flavours to be a great support and there is nothing more i think they could offer me that they don't already do.</i>
<i>Structured approach to selling outside of the region ... maybe focus workshop on subject, combined with visit to bigger markets / shows. i.e. How do we get D&G on the bigger UK map?</i>
<i>They are an extremely Dynamic group just work on their networking skills further</i>

<i>Add an associate member category for producers with an interest in the area but with principle activity located outside</i>
<i>I think it is a well run group who have been a great support to our business and I can't really see much improvement is needed, just a continuation would be very valuable</i>
<i>Joined up thinking, marketing, distribution etc etc.</i>
<i>As an start up I find them extremely necessary. I have just recently started my business and I honestly do not have enough background to reply about improvements. What I know is that they have put thought into most of areas.</i>
<i>it is doing a great job. They have worked very hard. I cannot think of anything they could improve on</i>
<i>By continuing the work of publicity and information.</i>
<i>I think they've done extremely well in the various activities and advertising which has taken place. It has helped our confidence and we have consulted them on various occasions.</i>
<i>Very dynamic in their thinking and operations as it stands right now.</i>
<i>Group marketing and Distribution</i>
<i>Distribution around Dumfries and Galloway is one of the issues we come across as small food producer.</i>
<i>I think the marketing has been fantastic but Development Work weak</i>
<i>I think they are doing a brilliant job but need more publicity out with the area to bring in more tourists to Dumfries & Galloway</i>
<i>Lobby for local producers at national level</i>
<i>By continuing the dedication to keep moving forward regardless of obstacles put in the way</i>
<i>Bit more interest shown in retail sector</i>
<i>More workshops & more industry events</i>
<i>Less emphasis on one-off 'food-circus' events and more on food provenance all year round.</i>

Survey respondents provided suggestions on the role Savour the Flavours should adopt in order to develop their businesses, many suggested the organisation was working effectively and minimal change was necessary, additional comments included;

Table 3: Summary of Business Benefits of being associated with StF

<i>One to one business development strategy</i>
<i>I would like to see the team further enhancing the opportunity to bring producers and end users (cafes etc) together.</i>
<i>The strengthen the Farmers' Market model in the area as many of the producers in the D&G area are breaking new ground for the area.</i>
<i>Promoting businesses towards England and access to markets beyond D&G</i>
<i>Continuing to offer events both for education and networking. Another Meet the Producer event in the future would be helpful and just continuing support and information sharing would be helpful.</i>
<i>Marketing and networking</i>
<i>Guidance / handholding / encouragement role through network workshops. become a key organisation for information and resources.</i>
<i>They offer a lot of support already in many different directions</i>
<i>Help with marketing new products sit down with each business for one hour and find out how you could help them</i>
<i>We need Galloway ambassadors: sending trade ambassadors to other cities, they could bring a portfolio of local produce and introduce it in Edinburgh, Glasgow. Help us to understand and maximize every opportunity we have by the power of cooperation in different areas, i.e. distribution, employment, website, exporting Scottish produce abroad.</i>
<i>Help to access information and grants to improve my business</i>
<i>I would like to see them as professionals to whom we can contact for advise and suggestions in growing our business. I would, however, say that they are doing this at the moment.</i>
<i>Somehow to further enhance the perceived value of small scale locally produced food. Getting demand for locally produced food into the public sector</i>
<i>Continuous promotion of local food and drink and farmers markets, buyers events, public events such as Flavour Fortnight.</i>
<i>An advisory but also active role in promoting businesses who do use local products. Keeping an up-to-date data base of local producers and trainers (chefs etc) that can be contacted for advice. Would like to see them get involved in the training side e.g. catering courses perhaps linked with other organisations to improve standards of catering in the region as the college don't seem to do this sort of thing.</i>
<i>Cost savings through effective procurement routes with other producers.</i>

Summary

The business survey responses highlight one key finding, that StF is even more respected and rated in 2013 than it was in 2011. In every comparable measure the project has outperformed the strong results from 2011. Although there is likely to be a degree of optimism bias in the responses this is not considered to be a factor when comparing responses across two time periods. Respondents clearly value the role of StF and once again there are strong economic benefits related to being associated with StF.

5 Key Findings

Findings

Stakeholders

The interviews with key stakeholders have indicated that all regional bodies linked to StF are supportive of the organisation. Each body has stated that StF is a valuable project to the food and drink sector in Dumfries and Galloway and has been successful in achieving what it was set up to achieve, namely promoting the food and drink sector.

Stakeholders rate the project highly and would like to see it continue in its current form, however this is likely to be a challenge in the current economic and funding environment. The closure of LEADER and the continued budgetary pressures on the local authority suggest that the future operation of the initiative will be challenging. Ultimately elements of co-operation, collaboration, innovation and sustainability across regional and European borders will need to be considered.

Project Activities

The review of project activities has shown that clear progress has been made on many activities, in particular the development of five new projects, of which four are now established as independent constituted bodies, and a pilot project which looks like becoming a full project rolled out across the region.

The success cannot be undervalued as 4 new bodies are now up and running and presenting real impacts within their area of expertise. Each project also has a clear vision for the future and what needs to be agreed and addressed in the short, medium and long term. An exceptional impact has been the cross working between the projects and this must be admired in the short space of time they have been operational.

There is a genuine feeling of collective responsibility and StF is a critical element of their success and continued operation. Their involvement has been frontloaded but it is important that they retain a close working relationship and continue to support the cross working of each project. If one project is to be supported in more detail it would be the schools project which is on the cusp of receiving full project status.

Businesses

The business survey responses highlight one key finding, that StF is even more respected and rated in 2013 than it was in 2011. In every comparable measure the project has outperformed the strong results from 2011. Although there is likely to be a degree of optimism bias in the responses this is not considered to be a factor when comparing responses across two time periods. Respondents clearly value the role of StF and once again there are strong economic benefits related to being associated with StF.

Conclusion

The evaluation of the StF II initiative has presented an independent review of progress and performance, and it is clear to see that StF continues to act as an important resource to grow the value of the food and drink sector in Dumfries and Galloway. The project can claim to have achieved a tangible economic impact and businesses rate the project higher now than in 2011, this is a significant finding considering the ongoing economic recession.