

South Australian Food and Wine Tourism Strategy 2009 – 2014



Foreword

Food and wine experiences have long been an integral part of the State's tourism marketing message promoting South Australia as a visitor destination.

However, despite South Australia being recognised as the home of Australian wine we cannot rest on our laurels, as other State's aggressively target these opportunities recognising travellers' desire for such experiences.

Furthermore, while South Australia has some outstanding food experiences, consumer research reveals that the State is not strongly associated with this attribute.

Acknowledging this, in 2008, the Minister's Tourism Round Table established an industry led Food and Wine Tourism Working Group to address these issues.

This Group was asked to prepare a strategic plan to strengthen the State's competitiveness in food and wine tourism and to forge stronger links between the food and wine tourism sectors.

This Plan is the culmination of the detailed investigations of the Working Group. It sets a clear path forward with detailed implementation action designed to realise the vision of SA being the world's leading food and wine tourism destination by 2020.

I am pleased to submit this final report to the Minister's Tourism Round Table. Special thanks go to the Working Group comprising:

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CONTENTS

	Page
Foreword	2
Executive Summary	4
1.0 Introduction	7
2.0 Strategic Context	7
3.0 Opportunity	8
4.0 Competitive Position	9
5.0 The Challenge	11
6.0 Targeting to Achieve the Tourism Target	13
7.0 South Australia's Tourism Brand Strategy	14
8.0 Wine Industry Branding Initiatives	15
9.0 Strategic Issues	16
- Marketing and promotion	16
- Product development	18
- Leadership and communication	20
- Collaboration	20
- Industry development	20
10.0 Vision	22
11.0 Moving Forward: Objectives and Strategies	23
12.0 Implementation	24
13.0 Key Performance Indicators	30
APPENDICES	
1. South Australia's Food and Wine Competitive Ranking	33
2. Food and Wine Research Findings	35
3. Food and Wine Tourism Market	38
4. South Australia's Brand Framework	41
5. Food and Wine Strategy Implementation Table	43

EXECUTIVE SUMMARY

The quality and reputation of South Australia's food and wine tourism experiences have a key role to play in strengthening SA's brand promise of being *a vibrant and welcoming place that celebrates the good things in life*.

SA's core brand attribute of being Australia's home of exceptional wine and produce, complements other core brand attributes of unspoilt nature at close proximity, enterprising tradition of creativity and innovation, and a beautiful city and festival spirit.

The State Strategic Plan tourism target is to achieve an increase in tourism expenditure from \$3.7 billion in 2002 to \$6.3 billion in 2014. The South Australian Tourism Plan identifies 13 priority strategies to achieve this target. One of these strategies is to encourage further investment in South Australia's food and wine tourism assets.

This strategy aims to create an unassailable competitive position for food and wine experiences and in doing so help to create global awareness of South Australia as one of the world's outstanding authentic food and wine destinations.

It also aims to increase the number of visitors, their length of stay and expenditure yield while in South Australia's food and wine regions, including Adelaide. This strategic approach has been developed within a longer-term [2020] vision while providing an action plan until 2014.

By 2020 South Australia will be recognised as the world's leading food & wine tourism destination

South Australia's wine, food and tourism sectors are a potential winning partnership that can put South Australia firmly on the global map by communicating the best of South Australia today; making South Australia easy to access and experience; and by creating an even more appealing South Australia of tomorrow.

New products and experiences will create exciting 'new news' about South Australia that will inspire people to visit and buy its produce both in situ, within SA and in SA's export markets. The holistic experiences that are a blend of heritage, culture and natural environment, will offer a compelling *celebration of the good things in life*.

Five objectives and 19 key strategies will help us achieve this vision (Table 1 on page 26 further identifies implementation actions with respect to these strategies).

Objective 1:

Communicate the best of SA's food and wine experiences of today

Strategies:

1. Integrate food and wine as a key experiential theme in SA tourism campaigns.
2. Identify strategic, affordable cooperative marketing opportunities between the tourism, food and wine industries.

3. Promote and further develop Tasting Australia as Australia's most significant food and wine tourism event.
4. Identify and promote authentic food and wine tourism products and hero brands via strategic and cost effective public relations activities.
5. Continue to promote the integration of food and wine experiences into existing flagship events and pre and post conference and event itineraries.

Objective 2:

Create more appealing SA food and wine experiences of tomorrow

Strategies:

1. Increase the range and appeal of South Australia's innovative food and wine experiences.
2. Encourage investment in 4+ star experiential accommodation and conference and meeting facilities within wine regions.
3. Encourage the ongoing development and improvement of existing food and wine tourism experiences and products.
4. Strategically align the State's planning policy framework to support opportunities for developing authentic food and wine experiences.
5. Make telling the story about SA's food and wine an outstanding competitive advantage.

Objective 3:

Make the South Australian food and wine experience easy to access

Strategies:

1. Bundle and package as appropriate, the best of South Australia's food and wine tourism opportunities.
2. Develop a specialised 'food and wine devotee' component of the existing southaustralia.com website.
3. Strengthen food and wine tourism distribution systems.

Objective 4:

Be creative in working together as an industry

Strategies:

1. Develop stronger working links between food, wine and tourism stakeholders (see list of stakeholders page 24).
2. Build intra and inter regional relationships and share knowledge and information.

Objective 5:

Increase industry understanding and professionalism

Strategies:

1. Improve professionalism of operators and business performance.
2. Develop career paths in food and wine tourism and keep talent within the State.
3. Fill gaps in research information on visitor characteristics, satisfaction and opportunities.
4. Raise awareness of tourism within the food and wine industry and of food and wine within the tourism industry.

Implementation

To forge high-level collaboration between the wine, food and tourism sectors it is recommended that the Food and Wine Tourism Working Group continue in order to gain momentum particularly in the implementation of the industry components of this strategy.

This will be achieved as a Working Group of the South Australian Tourism Industry Council (SATIC). SATIC will build industry capacity and capability and work in partnership with the SA Tourism Commission.

A primary role of this Group will be to network, inform, connect and foster productive partnerships as required among stakeholders relevant to the Food and Wine Tourism Strategy implementation. A key mechanism for communication with stakeholders would be the SATIC website.

Appendix 5 provides a more **detailed outline of the implementation action** relative to each objective and strategy.

Key Performance Indicators

Headline KPIs for food and wine tourism are shown below (KPIs relating to specific Objectives are contained on page 30):

KPI 1:

South Australia will increase its association with distinctive dining and fresh regional produce from 24% in 2007 to 40% by 2014 (Source: SATC Brand Health Monitor – multiple response)

KPI 2:

Increase South Australia's share of visitors to Australian wineries from 17 percent in 2007 to 22 percent in 2014 (Source: Tourism Research Australia data)

KPI 3:

As SA's food and wine flagship, the Barossa, will increase its domestic visitor preference (consideration) from 400,000 in 2007 to 750,000 in 2014 (Source: Roy Morgan Holiday Tracking survey).

1.0 Introduction

Food and wine are natural partners and wine, food and tourism are a potential winning partnership for South Australia.

This strategy, commissioned by the Minister's Tourism Round Table, is a joint initiative between the food, wine and tourism industries of South Australia and the South Australian Tourism Commission (SATC).

It identifies how tourism and the food and wine industries can work together to help achieve the South Australian Strategic Plan tourism target of \$6.3 billion in visitor expenditure by 2014, and at the same time achieve the mutual benefit of generating more business and more vibrant and profitable wine, food and tourism sectors.

Definition (from Tourism Australia)

A winery visitor is defined as a domestic or international visitor who visits at least one winery during their trip in Australia. A food visitor is defined as a domestic or international traveller who eats at a commercial food establishment during their trip in Australia.

Definition (from National Wine Tourism Strategy, 1998)

Wine tourism is visitation to wineries and wine regions to experience the unique qualities of contemporary Australian lifestyle associated with the enjoyment of wine at its source – including wine and food, landscape and cultural activities.

2.0 Strategic Context

The South Australia Strategic Plan tourism target is to increase visitor expenditure from \$3.7 billion in 2002 to \$6.3 billion by 2014. While ambitious, this target gives the tourism industry a positive focus on the future.

Importantly, it is the key imperative that will help to drive tourism demand, business profitability and return on investment for those that commit to the food and wine tourism opportunities available.

In December 2007, visitor expenditure was tracking at \$4.2 billion. However, despite the positive growth to date, tourism demand trend forecasts at this time showed that SA would achieve only \$5.2 billion in expenditure by 2014. This meant there would be a \$1.1 billion competitive gap between trend growth at the time and the target.

Closing this gap will be achieved by (1) communicating the best of South Australia today; (2) making the South Australia experience more accessible; and (3) by creating a more appealing South Australia of tomorrow.

Appeal testing and calibration research carried out in the domestic market for the SATC in 2008 found that **communicating the best of SA today will achieve \$300m of the \$1.1 billion gap between trend and target growth. That is, the best of South Australia today leaves us \$800 million short of filling the gap. The research is clear that this will have to be achieved through developing a more appealing and accessible SA of tomorrow based on our inherent strengths** [Source: Project Trend, BDA Marketing Planning, February, 2008].

Figure 1: Tourism Target and Forecast (December 2008)



With the advent of the current global economic conditions, the competitive gap is now forecast to be \$1.3 billion (see Figure 1).

While the current economic outlook is creating uncertainty in the marketplace and tourism patterns are likely to change in response to its impact, there will nevertheless be opportunities to compete for greater share of the market e.g. the lower Australian dollar will make overseas travel more expensive for Australians so they may substitute their overseas travel for domestic travel (domestic travel is currently 80%).

3.0 Opportunity

South Australia is recognised as the home of Australian wine. Indeed the South Australian wine industry promotes itself as the “*Heart of Australian Wine*”. Without question, wine and wineries are inherent tourism strengths for South Australia and have a key role to play in strengthening South Australia’s brand promise of being a *vibrant and welcoming place that celebrates the good things in life*.

“Straddling the centre of the Australian continent, South Australia is the wine industry’s powerhouse state, producing most of the nation’s wine and boasting some of the oldest individual vines in the world the State also has a diversity of regions ranging from the relatively warm temperate climate of the Barossa Valley through to the maritime precincts of the McLaren Vale, Southern Fleurieu, Currency Creek and Langhorne Creek regions on the Fleurieu Peninsula the cooler Adelaide Hills region the hotter Riverland region on the Murray River the south-eastern part of the State includes the Limestone Coast zone and the “terra rossa” soils overlying limestone which give rise to the distinctive elegant reds of the Coonawarra region And the Padthaway, Wrattobully and Mt Benson regions ... influenced by the tempering breezes of the nearby Southern Ocean”. (Source: SAWIA website)

“Our State’s food sector has established a reputation for excellence, and its products can be found all over the world – everywhere from local farmers markets, to shelves of retail giants, to the finest restaurants” (Premier Mike Rann, South Australian Food Plan 2007 – 2010).

Food and wine and associated experiences are either a core attribute or complementary attribute of the following South Australian regions and areas:

- Adelaide Hills
- Barossa
- Clare Valley
- Coonawarra
- Eyre Peninsula
- Fleurieu Peninsula
- Flinders / Outback
- Langhorne Creek
- Limestone Coast
- Kangaroo Island
- McLaren Vale
- Riverland
- Yorke Peninsula
- Murraylands

There are many good reasons why South Australia should continue to develop and invest in food & wine tourism experiences. These include:

- The number of international and domestic overnight and day trip visitors that go to wineries in Australia has increased over the past 5 years. In 2008, around 5.1 million visits in Australia included visits to wineries and 886,000 visitors to South Australia visited a winery during their stay. This equates to a 17% market share for South Australia. This is much higher than our total market share of visitors (7%).
- In 2008, 140,100 or 39% of international visitors to South Australia went to wineries at some stage during their visit to Australia.
- In 2008, 222,000 or 12% of all interstate overnight visitors to South Australia visited wineries.

4.0 South Australia's Competitive Position

The key wine regions of South Australia hold an established position in the international marketplace. The positioning is the result of wine industry investment in product development and marketing. South Australia's wineries are an outstanding example of continuous improvement with significant numbers investing in tourism and tourism marketing. In addition to providing wine tastings and sales, many now provide regional food, specialised tours and events as part of the visitor experience.

Indeed, several of the State's wine regions are internationally identifiable brands for the dedicated food and wine consumer, with recognition for some regions, higher than brand South Australia.

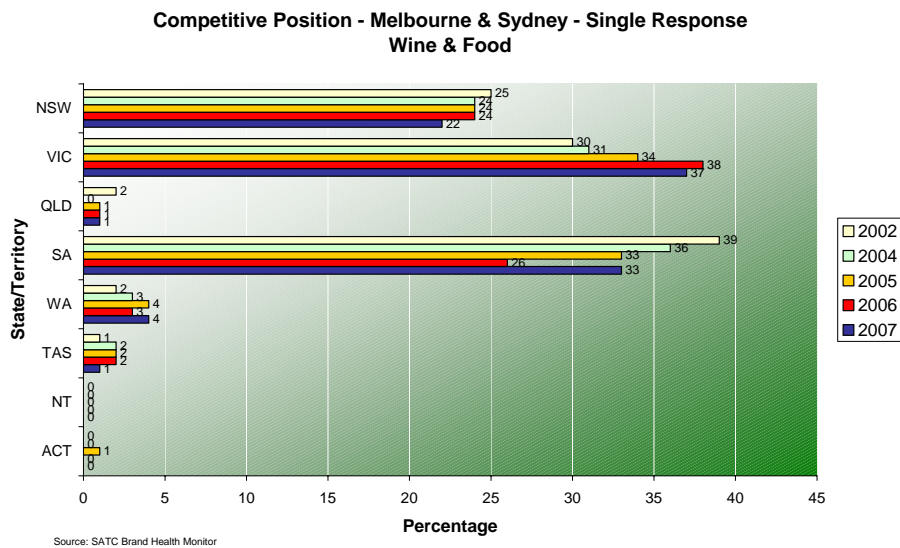
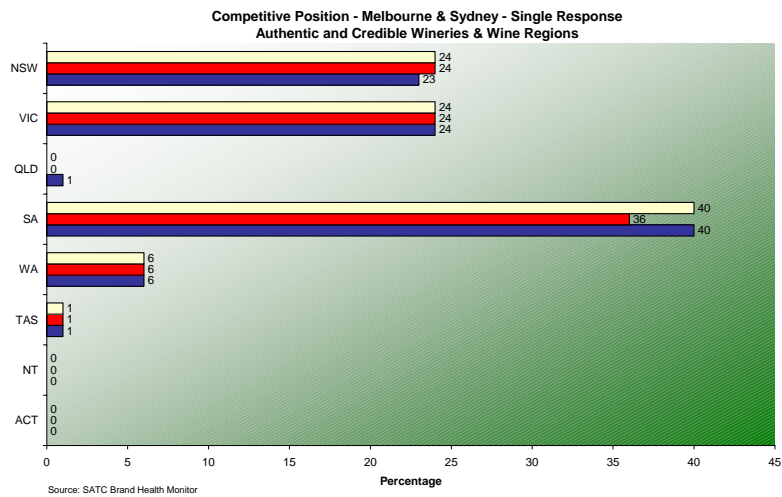
The link between food and wine production and tourism continues to strengthen with all sectors recognising the opportunities that exist for income generation, brand building, collaboration and a return on investment.

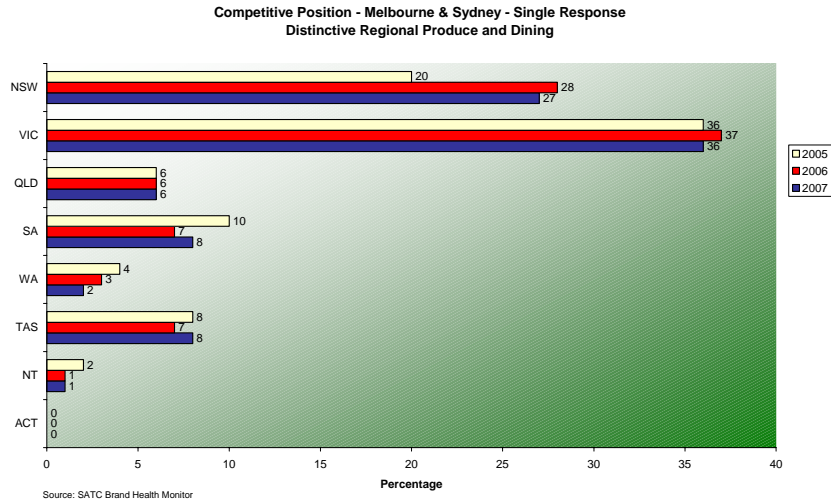
Figures 2(a)–(c) on page 10 shows South Australia's competitive position in terms of *'Authentic and Credible Wineries and Wine Regions; Wine and Food; and Distinctive Dining and Fresh Regional Produce* experiences in the key domestic markets of Sydney and Melbourne (which provide 73% of SA's interstate tourism market) [Source: SATC Brand Health Monitor, 2007].

These figures are for single responses only i.e. the State the consumer most associates with that theme (multiple response figures – i.e. which States [plural] are associated with these themes – are contained in Appendix 1).

These figures show that South Australia has a dominant association with *Authentic and Credible Wineries and Wine Regions*; is second to Victoria in terms of *Wine and Food* experiences; and is third to some considerable degree behind Victoria and New South Wales, in terms of *Distinctive Dining and Fresh Regional Produce*. Clearly South Australia’s recognition for food is not as strong as it is for wine and this requires a stronger unified image and association in both the marketing message and delivery of experiences.

Figures 2 (a)-(c): SA’s Competitive Position – Authentic and Credible Wineries and Wine Regions, Wine and Food and Distinctive Dining and Fresh Regional Produce





Following a joint SATC and South Australian wine industry initiative to conduct cellar door research in 2000 and 2003, it was found that while there was high consumer satisfaction with the quality of SA wines, the availability and quality of food at cellar doors was relatively poor. Similarly, there was considered a lack of complementary things to see and do.

As a result, in the past five or more years South Australia's wine, food and tourism industries have significantly invested in food and wine related tourism infrastructure and experiences, which gives a stronger basis for communicating the best of South Australia today.

Some recent examples include:

- Upstairs at Hollicks, Kitchen@The Poplars Winery and the Coonawarra Cellar Dwellers and Coonawarra After Dark festival
- Chapel Hill Gourmet Retreat, The Kitchen at Penny's Hill winery, Producers of McLaren Vale and the Alexandrina Cheese on the Fleurieu Peninsula
- Barossa Valley Cheese Company, Penfolds Make Your Own Blend Tour and The Louise & Appellation in the Barossa
- Hahndorf Hill Wines and The Lane Vineyard in the Adelaide Hills
- Sunset Wines, Island Pure Sheep Dairy and Island Beehive on Kangaroo Island
- Banrock Station
- The Clare Valley Progressive Picnic and the Riesling Trail
- Others include: Barossa's Butcher, Baker, Winemaker Trail, Eyre Peninsula's Seafood & Beyond Card, Adelaide Hills Food Trails, Cellar Door Pass and the Cheese and Wine Trails – which began in McLaren Vale and now extend into the Adelaide Hills, Clare Valley and the Barossa.

5.0 The Challenge

While the attribute most strongly associated with South Australia is its '*Authentic and Credible Wineries*' followed by '*Wine and Food*' this cannot be taken for granted. Notwithstanding the investment to date, the road ahead for food and wine tourism is likely to prove quite challenging as more states target and invest heavily in this opportunity thereby potentially eroding our tourist market share.

There is already strong evidence that South Australia is losing its traditional competitive edge in this regard. For example:

- The numbers visiting wineries in South Australia has not matched Australia's growth in international and domestic overnight and day trip visitors that go to wineries.
- While domestic overnight visitors to wineries in South Australia have increased by 4% in the past 7 years (2001 – 2008), over the same period, visitors to wineries across Australia have increased by 18%.
- The proportion of total domestic overnight visitors to wineries in Australia that visit a winery in South Australia has declined from 19% in 1998 to 16% in 2008.

Perhaps the most telling evidence that South Australia is losing its competitive edge in the face of aggressive competition is the declining 'preference' level for South Australia's capital, Adelaide, and our wine flagship destination – the Barossa (i.e. those people considering taking a holiday there within the next two years) [Source: Roy Morgan Holiday Tracking Survey].

Figure 3: Barossa Preference

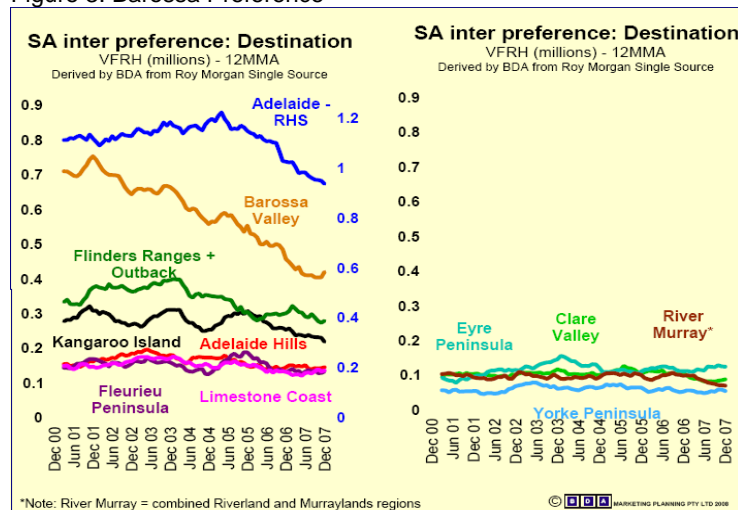


Figure 3 highlights the consistent trend of declining preference levels for Adelaide and for the Barossa. This correlates with the fact that over the past five years the potential of wine tourism has been identified by virtually every state with an increased focus on developing and promoting wine tourism. South Australia's market share is being eroded in favour of states such as New South Wales, Victoria and Western Australia who are increasingly successful in attracting winery visitors.

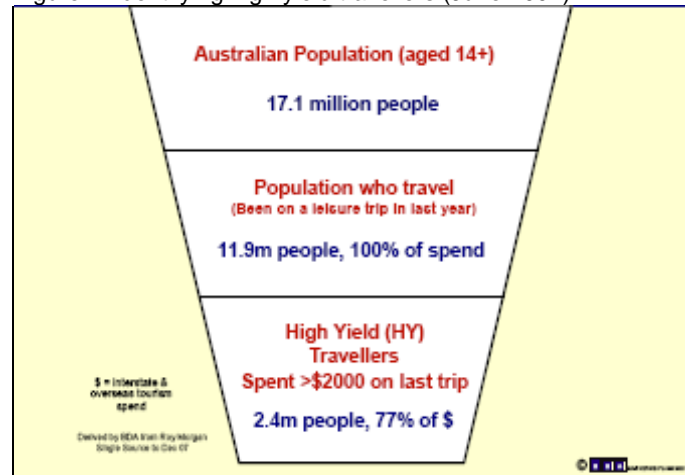
Notwithstanding this, recent appeal testing research undertaken for the South Australian Tourism Commission demonstrates that 'experiential interpretation of South Australia's *Wine Country*' is one of South Australia's potential winning holiday offers' (providing South Australia aspires to be at the cutting edge with new experiences and 'new news').

6.0 Targeting to Achieve the Tourism Target

South Australia's tourism target is expressed in terms of tourist expenditure. Figure 4 shows that 14% of the Australian population (i.e. 2.4 million people) spent more than \$2,000 in total (or \$200 per day) on their last trip.

Significantly, this 14% contributed more than 77% of the total amount spent by Australians on interstate and overseas trips. These higher yield travellers are therefore the key consumer market in terms of achieving the expenditure target and therefore tourism business profitability.

Figure 4: Identifying high yield travellers (June 2007)



The South Australian Tourism Commission's strategy is to target this high yield market segment. In the first instance SATC will target those in this segment that also have indicated a 'preference' to visit South Australia – that is, people mainly in Melbourne and Sydney who have South Australia in their 'consideration set' of potential holiday destinations (along with many other places), but need to be convinced to choose SA over these. Most are young and older affluent couples that take an average of four trips per year to various destinations.

This market is particularly pertinent to the food and wine sector in that what these high yield travellers want in a holiday is: new and liberating experiences, **great food and wine**, luxury and indulgence, unexpected highlights, great stories to share, being engaged by the people and places they visit, being close to nature and wanting to see and do and not stand and look (see Appendix 3).

The key to communicating with these high yield travellers includes the Internet (well above average use). Their use of Pay TV, cinema, newspapers, magazines (interstate) and the ABC is also above average.

Tourism Australia has identified a similar target within the international tourism market. In doing so they have identified seven key themes that will form the core of Australia's marketing message strategy. One of these seven themes is **food and wine** (see Appendix 3).

The key to communicating with the international high yield traveller lies in their avid use of technology in both private and business capacities. They are selective TV viewers, but are higher than average consumers of cable channels, and are predisposed to programs that meet their lifestyle and motivation profiles. Intellectual

programs and those with knowledge content are preferred. This audience is also well connected and likes to learn from and share information with their peers.

Within both these high yield domestic and international target markets there will be a proportion that are motivated first and foremost by food and wine experiences. The challenge will be to find productive ways to entice these travellers to chose SA and subsequently become strong advocates for the State (see Appendix 2).

The closest we are likely to come to identifying these enthusiasts is through their consumption of specialty gastronomy/wine media, cooking shows, food magazines and membership of food and wine clubs. The challenge is to find cost effective and broadly collaborative opportunities to make SA an icon for these key opinion leaders.

Targeting the high yield traveller will not be too limiting or alienate other prospects. On the contrary, by focusing on a primary audience with a clear message and relevant compelling experiences, and exceeding expectations, South Australia is likely to become an aspirational destination for others.

7.0 South Australia's Brand Strategy

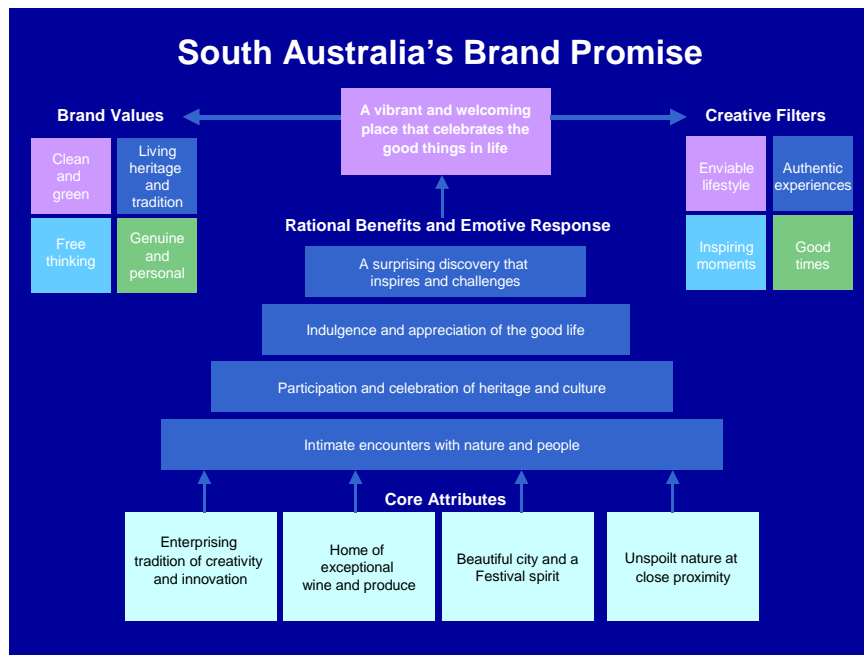
Based on this primary audience of high yield travellers, South Australia has determined what we want this target market to know, think and feel about us as a destination. This constitutes the destination brand.

The brand is the cornerstone of a destination's entire business growth strategy providing a relevant and cohesive guide to the marketing communication message, planning, policy, investment and development action. The brand is about the promise we make to our target audience and the coordinated effort to deliver on this.

Guy Kawasaki, in *The Art of Branding*, 2006, stated, *"If you want to beat your competition establish an uplifting brand. Successful brands are built on what people are saying about you, not what you are saying about yourself. People say good things about you when (a) you have a great product [or experience] and (b) you get people to spread the word about it"*.

Figure 5 on page 15 summarises the architecture of South Australia's brand strategy. The core attributes of South Australia upon which the brand is being built are: its enterprising tradition of creativity and innovation; being the home of exceptional wine and produce; its beautiful city and a festive spirit; and experiences of unspoilt nature at close proximity. These attributes can deliver both rational and importantly, emotive benefits to the visitor as shown below.

Figure 5: SA Brand Architecture



Based on these core attributes and benefits, South Australia seeks to establish a brand position in the national and global marketplace as *a vibrant and welcoming place that celebrates the good things in life*.

Food and wine experiences are a strong fit with SA's brand architecture. The core promise to the consumer and how it relates to food and wine 'unpacks' in detail as shown in Appendix 3.

South Australia's brand tool – '*South Australia. A brilliant blend*' – reflects SA's range of lifestyle advantages. '*Brilliant*' is a strong emotive word and '*blend*' (a familiar wine concept) represents the notion of diversity of experiences in a similar way to Victoria's Jig-Saw concept.

The blend of the old and new is reflected in the strong traditional 'S' and contemporary, freestyle, quirky, colourful and vibrant 'A'. Having said this, these tools are wall-paper only. What counts is the strategy and message behind this. Rather than confusing the market by chopping and changing the brand and brand message SA will push a consistent credible message consistent with the above framework.

To help do this, SA needs new heroes and 'new news'. The consumer clearly tells us not to confuse them with too much information, '*just tell us the best experiences you have and help us to discover your other surprises*'. The need to tell our authentic story and 'emotionalise' the experience cannot be overstated. There must be more connection and more engaging, participatory experiences that intrigue, stimulate curiosity and surprise and delight the visitor.

8.0 Wine Branding Initiatives

The South Australian Wine Industry Association (SAWIA) with the support of the Department of Trade and Economic Development (DTED) recently launched its regional wine branding framework.

The brand 'essence' that differentiates one wine region from another has been identified for South Australia's seven most internationally well-known wine regions. Each of these statements has been supported with 12 hero images:

- **Adelaide Hills** – a cool and green, beautiful part of South Australia with fresh, vibrant wines of contemporary character
- **Barossa** – Australia's most famous wine region, proud of its history and home of our nation's most renowned names in wine
- **Clare Valley** – an elegant wine region of intimate beauty
- **Coonawarra** – a place where rich and red defines the soil, the wines and the passionate winemaking community
- **Langhorne Creek** – a natural environment where a balanced approach of old and new produces wine of remarkable quality
- **McLaren Vale** – an inspiring region where rolling hillsides lined with vines are cooled by the spray of the sea's breeze
- **Riverland** – a generous landscape, warmed by sunshine and nurtured by the river, produces grapes for Australia's most popular wines.

The project has culminated in the development of a comprehensive web-based branding resource library for use by everyone involved in promoting South Australian wine. This is a key resource for communicating the best of SA today by telling the story of its great wine destinations and products. In addition, each of these regional brands are serviced and supported by regional wine associations and for many of whom, tourism promotion and development is a core activity.

SA is home to some of Australia's most recognisable food and wine brands such as; Penfolds, Barossa, Jacobs Creek, Coonawarra, Haighs, Maggie Beer, Coffin Bay Oysters, Beerenburg, Cheong Liew, Southern Rock Lobsters, Appellation in the Barossa etc. These brands largely equate to a tourism related experience/s thereby providing South Australia with icons to collaboratively promote.

9.0 Strategic Issues

Strategic issues relevant to SA's wine, food and tourism reputation include:

9.1. Marketing and Promotion

To increase our share of the existing food and wine tourism market and to increase awareness of this vital sector and subsequently demand for South Australia as a tourism destination, will require collaborative and productive marketing by both SATC and the food, wine and tourism industry.

9.1.1 Existing Brands

As mentioned above, South Australia is home to many of the world leading food and wine brands. These brands include people, places and products and have significant equity that can be leveraged for the benefit of brand South Australia and to ultimately increase our appeal as a tourism destination.

While *South Australia* is our State brand, this is a difficult concept for the consumer to grasp particularly in the international market. It therefore makes sense to leverage other brands in the international market in particular and connect products to place e.g. *Adelaide. South Australia; Barossa. South*

Australia; Coonawarra. South Australia; Wolf Blass. South Australia; Clean Seas. South Australia; Beerenberg. South Australia etc.

9.1.2 Tasting Australia

Events not only give people a reason to come, but also bring a sense of vibrancy to a place. Tasting Australia is South Australia's highest profile food and wine tourism event with a current focus on trade and media. South Australia should attract more of our domestic target visitors by focusing on its tourism appeal and adding regional value to this event.

9.1.3 World Food Exchange

South Australia's World Food Exchange, an Australian first, demonstrated how to bring more food and wine lovers from around the world to our tables, particularly targeting the dedicated food and wine traveller (see Appendix 2). As its reputation grows, World Food Exchange offers the opportunity for cooperative promotion of South Australia's agricultural produce and food and wine tourism experiences. It can be leveraged to show that South Australia is not just the home of Australian wine, but also one of the finest, most authentic and environmentally sustainable food and wine destinations in the world.

9.1.4 Adelaide

Adelaide needs to be promoted as our State's 'capital' of all things culinary, an Australian leader, an innovator, a city of excellence from the authentic, casual through to the elite experiences, accessible, interesting, artistic and adventurous.

9.1.5 Regional Food & Wine

Food and wine is rarely produced in cities. South Australia is fortunate in having an abundance of extremely accessible regional food and wine experiences, underpinned by a vibrant and authentic food and wine culture. In addition, many of the experiences are in close proximity to coastal experiences, which are key motivators for travel.

The aquaculture industry has diversified into tourism with the Seafood and Aquaculture Trail on the Eyre Peninsula, and we also have the Cheese and Wine Trail in McLaren Vale. Learning how to build and further develop experiences such as these will be advantageous for SA.

9.1.6 Targeting the Market

South Australia's high yield target market and the wine enthusiast within it are complementary. Enticing these markets can build our brand, create aspiration and fulfil both our short and long term goals. In many of South Australia's wine regions you can still find the traditional values that may have been forgotten in other 'faster' parts of the world.

Research is required to better understand how the food and wine enthusiast can help drive broader tourism demand outcomes toward the target. The opportunity exists to present these values in a rejuvenated, but at the same time unpretentious, progressive and importantly innovative way. The global trend towards 'oldways,' 'locavore' – or 'slow food' is an opportunity consistent with these market expectations already being explored within South Australia.

9.1.7 Food and Wine Trade Events/Media

High-profile trade events run and attended by the food and wine industry offer opportunities to build respect and desire in the State's domestic and international market – through its appeal to opinion leading food and wine enthusiasts and event, convention and business visitors. Within the context of limited resources, funds must be judiciously applied and evaluated for effectiveness in contributing to the tourism target.

9.1.8 Accessibility / Communication

In tourism, making it easy to know about and access the destination is crucial. Integrating food and wine into the brand message, 'bundling' on ground experiences and information to help make the SA offer more legible in the mind of the consumer and providing a richer experience, are crucial. It will be important to create a clear mental map and notion of choice in the mind of the consumer. While brand strategy is important, it does not achieve anything without an effective distribution system being in place.

9.2. Product Development

9.2.1 Food and Wine Tourism Experiences

In order for South Australia to increase its appeal as a food and wine tourism destination, we need to keep abreast of consumer trends and maintain a commitment to continuous improvement. In recent years, we have seen a move away from the demand for 'look and see' type of visitor experience towards 'touch and feel' (Wine Federation of Australia). Food and wine tourism operators need to continue to innovate and can and should be responding to these changing consumer preferences.

Recognisable brands such as Penfolds and Jacobs Creek understand the value of "home" to their branding and have spent considerable sums to portray that sense of home and hospitality to consumers. There are other experiences that can be developed which appeal to sophisticated, high yield consumers without the enormous infrastructure cost. Real experiences, with real people, providing real hospitality provides a memorable experience for visitors.

The significant investment that predominantly the wine industry has made in tourism in recent years providing our state with a wealth of world-class facilities and experiences, from the large (Jacobs Creek Visitors Centre) to the small (Koonara Cellar Door) must be sustained by productive marketing to ensure return on investment and continuous improvement through further investment.

9.2.2 New and Refurbished Accommodation

Four star+ accommodation is not only the fastest growing segment of Australia's accommodation market (with demand up 61% between 2001 and 2007), but has also been identified in SATC research as the preferred accommodation choice of SA's high yield target market.

It is important that this accommodation is aspirational; is an integral part of the experience; responsiveness to its site attributes, is environmentally sustainable; and achieves excellence in design and emotive response.

It is crucial that South Australia's Development Plan facilitates sustainable accommodation and value adding development, where ambience is created

through the connection with the site and locality attributes (see Design Guidelines for Sustainable Tourism Development at www.tourism.sa.gov.au).

9.2.3 Telling the Genuine Story

A particular key to visitor satisfaction in regard to the above is to achieve understanding and an emotional connection with the destination, place, event, or product being offered. This can be achieved by telling the authentic story – often things that are taken for granted by the operator or locals, but which the visitor finds intriguing and engaging. Operators should be encouraged to participate in Interpretation training programs, such as those conducted by Flinders University. These programs are aimed specifically at improving business profitability.

9.2.4 Festivals and Events

Festivals and events create new news, vibrancy, a sense of place and a reason to visit. South Australia's food and wine events are vital to our success as a tourism destination. Existing events include Tasting Australia and the World Food Exchange, as mentioned above, through to the regional flagship events such as the McLaren Vale Sea and Vines, Clare Valley Gourmet Weekend, Barossa Gourmet Weekend, Tunarama in Port Lincoln, Fleurieu Peninsula Fiesta and the Coonawarra Cabernet Celebrations. Aspirational events include the Shiraz Alliance, the rising stars of Coonawarra After Dark, CheeseFest, Crush in the Adelaide Hills, Barossa Slow and the Cape Jaffa Food and Wine Festival.

In addition to the food and wine themed events, there lies an opportunity to add and improve the food and wine component of existing flagship events such as the Tour Down Under, Clipsal 500, Adelaide Show, WOMAD, Adelaide Arts Festival, Fringe Festival, Cabaret Festival, Sporting events, Wooden Boat Festival and Meetings and Conventions.

9.2.5 Bundling, Packaging and Distribution

In addition to day tours to food and wine regions, a selection of innovative and exciting fixed or flexible packages need to be developed for consumers. Fixed packages can be brochured by the international trade in particular. They need to be appealing all-inclusive packages with set departure dates. In addition to year round touring options special packages should also be built around the Festivals and Events that are on the SA calendar.

To broaden South Australia's appeal, new and innovative food and wine tourism experiences need to be developed in response to changing consumer needs. Regional Marketing organisations working with the wine industry, accommodation sector and the food industry, potentially should act as a co-ordinator and 'bundler' of the best available experiences, and as a valuable central information source to Agents, Wholesalers, Inbound Tour Operators and Tour Operators.

Packages and new experiences developed need to be commissionable for the tourism distribution system otherwise the uptake by the trade will be minimal and potential for demand stimulus lost.

Visitor Information Centres play an important role in the on ground distribution system. A networked online capacity will be important to cross promoting and selling. As increasingly the key source of information and bookings, a powerful distribution capacity on the Internet is essential.

9.2.6 Transport / Infrastructure

To maximise our interstate and international visitation, we need to ensure that regular, affordable and timely transport services are available, including air, road and rail, and including regional areas. The importance of road signage and trail signage centres must be acknowledged.

9.3. Leadership and Communication

Leadership within industry and government will be critical to the success of this strategy. Whilst we aspire to a comprehensive alliance involving all players, in the short term a continuation of the Food and Wine Tourism Working Group to oversee the implementation of the strategy is perhaps a more focussed approach. Regular and transparent communication to all stakeholders is important including promoting links to available research, examples of best practice and information on coming events. The announcement of the South Australian Tourism Industry Council with a charter to meet business-to-business needs is a great opportunity in this regard.

9.4. Collaboration

9.4.1 Industry and Government collaboration

Given the simultaneous product–place benefits, it is important to find effective ways to forge a united approach for greater impact and mutual benefit. We have before us a tremendous opportunity for the food and wine industries, tourism operators, State and Local Government sectors and wine region organisations to find better ways to work together to achieve mutually beneficial outcomes.

9.4.2 Industry collaboration

The food and wine industries need to continue to evolve and find new and improved ways to support each other where co-operative marketing and product development opportunities exist.

9.5. Industry Development

9.5.1 Quality

From Sustainable Tourism CRC research we know that the quality of food and wine products is a critical factor in the visitation decision-making process. We need to encourage and support our food and wine producers in their pursuit of continuous improvement, as this underpins the future success and growth of our food and wine tourism industry. Operator engagement with the South Australian Tourism Accreditation Program should be encouraged.

9.5.2 Environmental Sustainability

Given the State Government's and the food, wine and tourism sectors' commitment to sustainability, this is potentially a key competitive advantage that SA can deliver in a market that is becoming increasingly environmentally conscious. While tourism research shows that the consumers' values and behaviours don't yet match on this issue, it will in time, become a customer expectation of any business.

There is the potential to create an opportunity out of the consumers' uncertainty and latent desire in this regard. High quality design that responds

to and reflects its natural landscape, local vernacular and uses sustainable technologies and credible Climate Change Certification can actually lead the market.

9.5.3 Education and Training

Supporting the on-going development of strong individual food and wine experiences is essential for the economic sustainability of the producers in this competitive market.

The food and wine industries should be encouraged to learn more about the benefits of tourism to their businesses (brand value and demand generation) and informed about tourism structures and opportunities.

The National Tourism Accreditation Program aims to improve business performance and reassure consumers of a commitment to the highest quality business practices (WFA), and the industry should be encouraged and supported to participate in this scheme.

South Australia is fortunate in having a number of world leading food, wine and tourism training providers, many of whom also service regional South Australia. (e.g. Flinders University, Adelaide University, University of South Australia, TAFE, Jacobs Creek Visitors Centre, International College of Hotel Management and Le Cordon Bleu).

9.5.4 Research

There is currently a paucity of data for the food and wine tourism sector. Along with pursuing accreditation to help guarantee quality experiences, business understanding and professionalism should be improved through commitment to acquiring cellar door metrics at an affordable price, and benchmarking and trend data (on-line).

Additional food and wine tourism research is at times undertaken by industry organisations, training providers etc and when and if available findings should be made available to industry to keep them abreast of the latest information. Research to understand the role of food and wine enthusiasts as market leaders would also be valuable.

The proposed South Australian Tourism Industry Council (SATIC) plans to create a business-to-business website that would be an appropriate vehicle in this regard.

10.0 South Australia's Food & Wine Tourism Vision

This strategy aims to create an unassailable domestic and international competitive position for food and wine experiences. In doing so it will help create global awareness of SA as one of the world's outstanding authentic food and wine destinations.

It also aims to increase the number of visitors, their length of stay and expenditure yield while in South Australia's wine regions. This strategic approach has been developed within a longer-term [2020] vision while providing an action plan until 2014.

By 2020 South Australia will be recognised as the world's leading food & wine tourism destination

South Australia's wine, food and tourism sectors must form a winning partnership to put SA firmly on the global map by communicating the best of SA today; making SA easy to access and experience; and by creating an even more appealing SA of tomorrow. It will achieve the mantle of one of the finest, most authentic and environmentally sustainable food and wine destinations in the world.

Food and wine will be a key theme in South Australia's tourism marketing message. New products and experiences will create exciting 'new news' about SA that will inspire people to visit and buy its produce. The holistic experiences of food and wine that blend with heritage, culture and natural environment, will offer a compelling 'sense of place' and *celebration of the good things in life* (see Fig. 6 and Appendix 4).

Figure 6: The Concept of Food and Wine Linkages



11.0 Moving Forward: Objectives and Strategies

For food and wine tourism to strengthen its competitive position, a long-term focus and commitment is required. This strategy provides the first steps in the journey. The following 19 strategies are regarded as the key actions that will make the biggest difference to South Australia's improved performance in Food and Wine Tourism.

Table 1 on page 26 contains Implementation Actions that accompany these goals and strategies and Appendix 5 contains a detailed Implementation Schedule.

Objective 1:

Communicate the best of SA's food and wine experiences of today

Strategies:

1. Integrate food and wine as a key experiential theme in SA tourism campaigns.
2. Identify strategic, affordable co-operative marketing opportunities between tourism and food and wine industries
3. Promote and further develop Tasting Australia as Australia's most significant food and wine tourism event
4. Identify and promote authentic food and wine tourism products and hero brands via strategic and cost effective Public Relations activities
5. Continue to promote the integration of food and wine experiences into existing flagship events and pre and post conference and event itineraries.

Objective 2:

Create more appealing SA food and wine experiences of tomorrow

Strategies:

1. Increase the range and appeal of South Australia's innovative food and wine experiences
2. Encourage investment in 4+ star experiential accommodation and conference and meeting facilities within wine regions
3. Encourage the ongoing development and improvement of existing food and wine tourism experiences and products
4. Strategically align the State's planning policy framework to support opportunities for developing authentic food and wine experiences
5. Make telling the story about SA's food and wine an outstanding competitive advantage.

Objective 3:

Make the South Australian food and wine experience easy to access

Strategies:

1. Bundle and package as appropriate the best of South Australia's food and wine tourism opportunities
2. Develop a specialised 'food and wine devotee' component of the existing southaustralia.com website
3. Strengthen food and wine tourism distribution systems.

Objective 4:

Be creative in working together as an industry

Strategies:

1. Develop stronger working links between food and wine stakeholders (see list of key stakeholders below).
2. Build intra and inter regional relationships and share knowledge and information.

Objective 5:

Increase industry understanding and professionalism

Strategies:

1. Improve professionalism and business performance of operators.
2. Develop career paths in food and wine tourism and keep talent within the State.
3. Fill gaps in research information on visitor characteristics, satisfaction and opportunities.
4. Raise awareness of tourism within food and wine industries and of food and wine within the tourism industry.

12.0 Implementation

The SA Wine Council and Premier's Food Forum are important initiatives in the food and wine sectors. However, as tourism is incidental to the complex issues facing these bodies they are not best suited to focus on tourism issues.

It is considered it would be a more productive use of resources to forge high-level collaboration between the wine, food and tourism sectors through the continuation of the Food and Wine Tourism Working Group to steward the implementation, and especially the industry components, of this strategy.

This will be transitioned to become a Working Group of the South Australian Tourism Industry Council (SATIC). SATIC's role is to build industry capacity and capability and work in partnership with the SA Tourism Commission.

A primary role of this Group will be to network, inform, connect and foster productive partnerships and projects as required among the following stakeholders relevant to the Food and Wine Tourism Strategy implementation:

- South Australian Tourism Commission
- Tourism Industry
- SA Wine Industry Council
- SA Wine Industry Association
- Premier's Food Council
- Minister's Tourism Round Table
- Primary Industries and Resources South Australia
- Department of Trade and Economic Development
- Regional Food Groups
- Regional Tourism Marketing Committees
- Regional Wine Organisations

- Winemaker's Federation of Australia
- Restaurant and Catering Association
- Australian Tourism Export Council
- Local Government
- Adelaide Convention and Tourism Authority

This Group should champion and set the agenda for collaboration in the wine, food and tourism sectors and subsequently feed in key issues on a specific purpose/key project basis. A key mechanism for communication with stakeholders will be the SATIC website.

The Tourism Food and Wine Working Group should have the implementation of the Food and Wine Tourism Strategy 2009-2014 (and any relevant SA Tourism Plan 2009-2014 strategies) as its key Terms of Reference.

The Working Group should be relatively small comprising people with influence from key relevant bodies mentioned above, but connected to the broad stakeholders, plus a senior SATC representative (to facilitate information flow and communications including bi-annual meetings with key SATC functions), and through SATIC should report back to the Minister's Tourism Round Table from time to time.

Table 1 provides an outline of the implementation action relative to each objective and strategy.

Table 1: Towards Implementation

	GOALS and STRATEGIES	IMPLEMENTATION ACTION
1.	Communicate the best of SA's food and wine experiences of today	
1.1	Integrate food and wine as a key experiential theme in SA tourism campaigns	<ul style="list-style-type: none"> • Utilise both iconic and emerging food and wine products, hero brands, events and personalities. • Develop a South Australian Food and Wine Guide and transition to a collaborative production, as it becomes more valued by the market and tourism businesses. • Drive food and wine 'devotees' to proposed 'devotee' part of sa.com website (see 3.2).
1.2	Identify strategic, affordable co-operative marketing opportunities between tourism and food and wine industries	<ul style="list-style-type: none"> • SATC provide prospectus for specific industry cooperative opportunities and advice of marketing program to encourage collective and individual leveraging. • F&W Working Group operating under SA Tourism Industry Council (see 4.1) to suggest and communicate with food and wine industry stakeholders re opportunities.
1.3	Promote and further develop Tasting Australia as Australia's most significant food and wine tourism event	<ul style="list-style-type: none"> • Explore the opportunity to grow the Adelaide based Tasting Australia 2010 as an iconic consumer event. • Differentiate this event from the complementary World Food Exchange (2011).
1.4	Identify and promote authentic food and wine tourism products and hero brands via strategic and cost effective public relations activities	<ul style="list-style-type: none"> • Use new and existing innovative food and wine tourism products to retain the markets attention. • F&W Working Group operating under SA Tourism Industry Council (see 4.1) to advise SA Tourism Commission of new 'hero' products and 'new news' to incorporate into Famils, PR activities and appropriate marketing activity. • Collaboratively target the top food and wine writers in the world.
1.5	Continue to promote the integration of food and wine experiences into existing flagship events and pre and post conference and event itineraries	<ul style="list-style-type: none"> • Better leverage existing program of events and conferences (e.g. using ACTA incentives brochure). • Ensure recognition of this opportunity in SA Event Strategy currently being prepared.

2.	Create a more appealing SA food and wine experience of tomorrow	
2.1	Increase the range and appeal of South Australia's innovative new and existing food and wine experiences	<ul style="list-style-type: none"> • Identify and fill gaps (including unique dining, gourmet retreats, specialised winery, vineyard and producer tours, intimate tastings and exclusive, personalised experiences, festivals and events and wine & food trails). • Ensure Adelaide owns the mantle of Australia's centre for food and wine (e.g. permanent focus; Adelaide Food and Wine Festival etc). • Reinvigorate the Barossa and other key regions (ensuring the iconic things remain iconic). • Help grow strategic local events that celebrate the State's food and wine and have the potential to attract both the F&W enthusiast and lifestyle visitor from outside the region.

		<ul style="list-style-type: none"> • Create awareness of the activities and the evolution of Regional Food Groups (e.g. Farmers' Markets).
2.2	Encourage investment in 4+ star experiential accommodation and conference and meeting facilities within wine regions	<ul style="list-style-type: none"> • SATC as part of its Tourism Investment attraction program to encourage strategic and innovative projects. Relevant Economic Development Boards and Local Governments to help facilitate.
2.3	Encourage the ongoing development and improvement of existing food and wine tourism experiences and products	<ul style="list-style-type: none"> • Maintain the food and wine tourism infrastructure funding program. • Undertake continuous improvement of the food and wine experience. • Encourage SA food and wine regions to benchmark for continuous improvement against other world leading food and wine regions.
2.4	Strategically align the State's planning policy framework to support opportunities for developing authentic food and wine experiences	<ul style="list-style-type: none"> • Target spatial planning frameworks, Better Development Plan, Development Plan Amendments and Designated Primary Production Areas).
2.5	Make telling the story about SA's food and wine an outstanding competitive advantage	<ul style="list-style-type: none"> • Access high quality advice and practical tuition. • Leverage SATIC initiative of training for storytelling (note this training has business generation measures as key outcomes). • Establish several champions that demonstrate the business return from excelling in authentic story-telling about the product and its locality.

3.	Make the South Australian food and wine experience easy to access	
3.1	Bundle and package as appropriate the best of South Australia's food and wine tourism opportunities	<ul style="list-style-type: none"> • Bundle food and wine experiences with other relevant coastal, nature-based, recreation, arts & culture and accommodation holiday experiences or bundle focussed food and wine experiences. • Identify specific trail / itinerary opportunities suitable for national and international markets. • Seek opportunities for national links.
3.2	Develop a specialised 'food and wine devotee' component of the existing sa.com website	<ul style="list-style-type: none"> • SATC to ensure site incorporates quality specialty information, an interactive map and flexible itinerary suggestions including food and wine holidays.
3.3	Strengthen food and wine tourism distribution systems and leverage non-tourism distribution systems	<ul style="list-style-type: none"> • Identify at least one brand in each region that could get into the tourism distribution system. • Develop tools for travelling SA winemakers to promote SA as a food and wine destination (link destination brand & retail). • Work with wine industry to find ways of linking product and place (e.g. brand websites linked to sa.com; have every bottle of SA wine carry sa.com identification see 3.2 etc). • Encourage Visitor Information Centres and Regional Tourism Associations to cross promote and link regional food and wine tourism experiences.

4.	Be creative in working together	
4.1	Develop stronger working links between food and wine stakeholders (see list of key stakeholders page 23)	<ul style="list-style-type: none"> • Achieve industry operational links by transitioning F&W Working Group into SA Tourism Industry Council (SATIC). • Develop Communication Plan (relevant engagement to deliver the objectives). • Link into SATIC website as key means of communicating with stakeholders. • Develop alliances with complementary tourism sectors such as the arts, regional food production, nature. • Forge closer connection between SATC's PR unit and the industry for famils.
4.2	Build intra and inter regional relationships and share knowledge and information	<ul style="list-style-type: none"> • Identify and work with regional advocates who can encourage greater collaboration, communication and information sharing in and among regions. • Bring food and wine icons and complementary experiences together. • Develop cross regional opportunities.

5.	Increase industry understanding and professionalism	
5.1	Improve professionalism of operators and business performance	<ul style="list-style-type: none"> • Encourage tourism accreditation (green tick) or other appropriate business systems as tools for improvement. • Leverage the proposed new operational links with SATIC to encourage operators to seek accreditation. • Use existing accredited operators as 'champions' to encourage those unsure. • Encourage the evaluation of accreditation programs to foster continuous improvement in their value to the consumer and operator.
5.2	Develop career paths in food and wine tourism and keep talent within the State	<ul style="list-style-type: none"> • Leverage the proposed new operational links with SATIC to identify skills gaps. • Support a pilot collaborative training framework between food, wine and tourism that delivers on-the-job training and mentoring that focuses on building skills in hospitality, and fulfilling visitor needs of interpreting and connecting with the local way of life. • Work with existing training providers to deliver appropriate, timely and accessible training and to identify and promote career paths. • Identify migrant and backpacker opportunities.
5.3	Fill gaps in research information on visitor characteristics, satisfaction and opportunities	<ul style="list-style-type: none"> • Develop a research agenda (including better F&W questions on TRA national surveys). • Strengthen participation in the process of acquiring on-line data from cellar doors to provide benchmark and trend information. • Investigate opportunity for charging for premium experience through redemption purchase for tastings.

5.4	Raise awareness of tourism within food and wine industries, and of food and wine within tourism industry	<ul style="list-style-type: none"> • Target key stakeholders (see page 24) with strongly aligned messages (i.e. make the invisible visible and the opportunities clear). • Leverage the proposed South Australian Tourism Industry Council's business-to-business website. • Disseminate research findings and advice and information on food and wine tourism.
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Appendix 5 contains a more detailed Food and Wine Tourism Strategy Implementation Table.

13.0 Key Performance Indicators (KPIs)

Headline KPI 1:

Increase South Australia's association with distinctive dining and fresh regional produce from 24% in 2007 to 40% by 2014 (Source: SATC Brand Health Monitor – multiple response)

Headline KPI 2:

Increase South Australia's share of visitors to Australian wineries from 17% in 2007 to 22% in 2014 (Source: Tourism Research Australia data)

Headline KPI 3:

As SA's food and wine flagship, increase the Barossa's domestic visitor preference (consideration) from 400,000 in 2007 to 750,000 in 2014 i.e. reverse decline and return to 2001 levels (Source: Roy Morgan Holiday Tracking Survey)

Goal 1: Communicate the best of SA's food and wine experiences of today

KPI: Increase the level of industry buy-in to cooperative marketing of food and wine tourism to \$250,000 by 2014.

Goal 2: Create a more appealing SA food and wine experience of tomorrow

KPI: At least \$75 million in strategic tourism and tourism related development by 2014.

Goal 3: Make the South Australian food and wine experience easy to access

KPI: Growth in number of hits on the food and wine component of the SATC's consumer website (to be determined).

Goal 4: Be creative in working together as an industry

KPI: Development and maintenance of Food and Wine Tourism Industry Communication Plan.

Goal 5: Increase industry understanding and professionalism

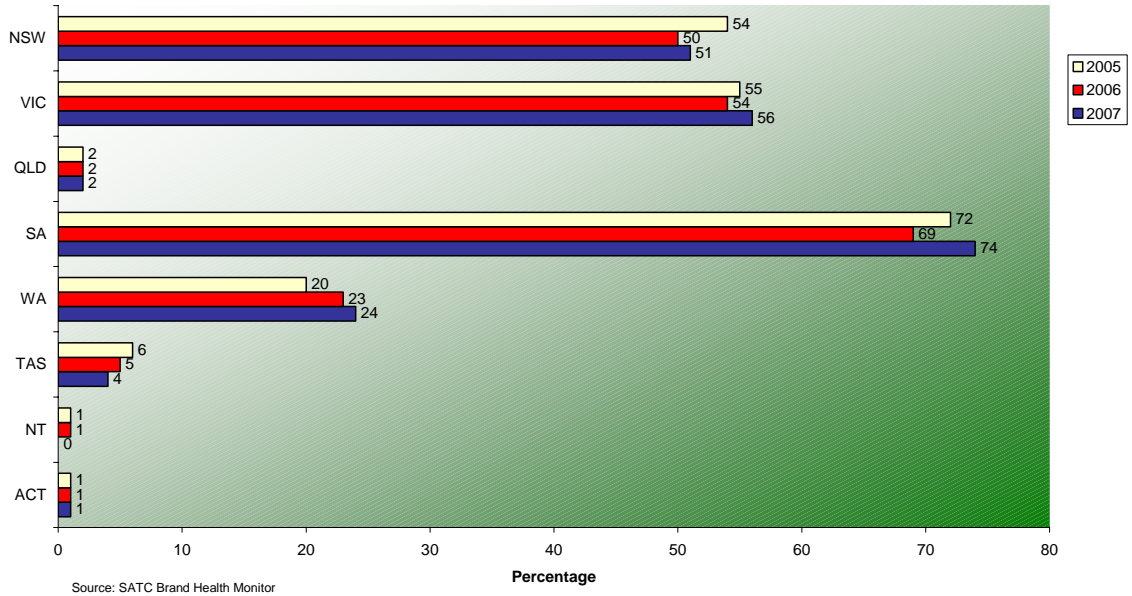
KPI: Increase in the number of food and wine products that participate in accreditation and other training opportunities (benchmark and target to be determined).

APPENDICES

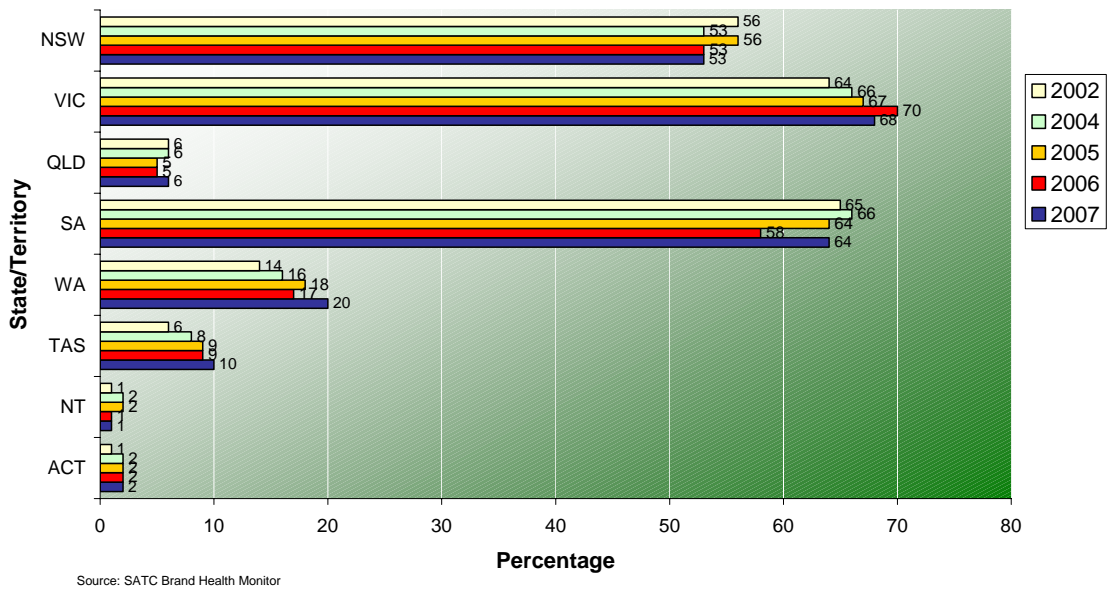
1. SA's Food and Wine Competitive Ranking
2. Food and Wine Research Findings
3. The Food and Wine Tourism Market
4. SA's Brand Framework
5. Food and Wine Strategy Implementation Table

APPENDIX 1: SA's COMPETITIVE RANKING IN FOOD AND WINE

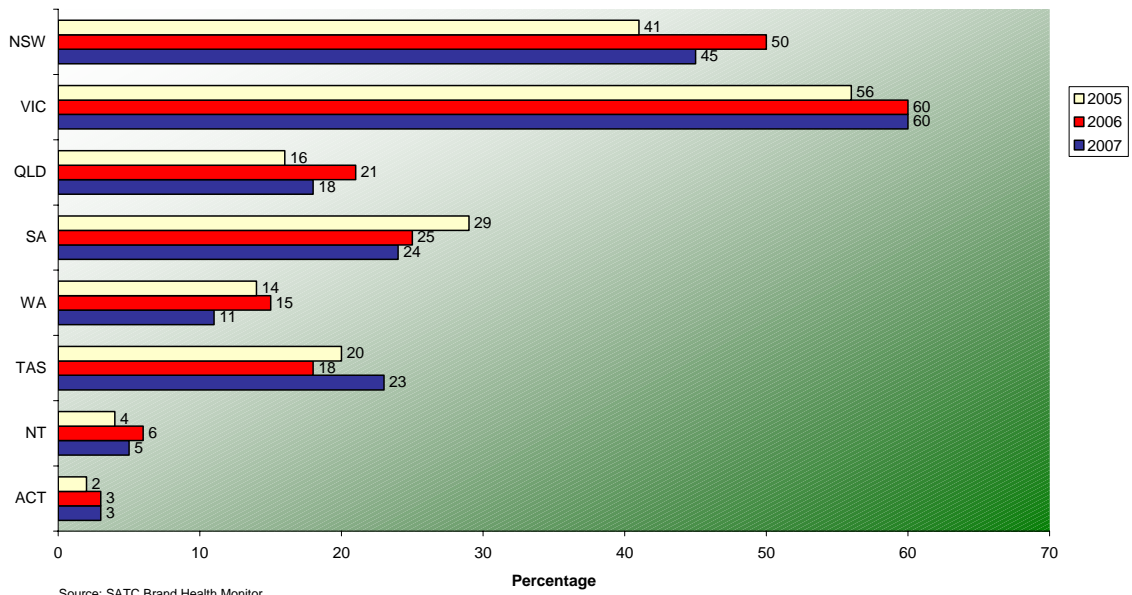
Competitive Position - Melbourne & Sydney - Multiple Response
Authentic and Credible Wineries & Wine Regions



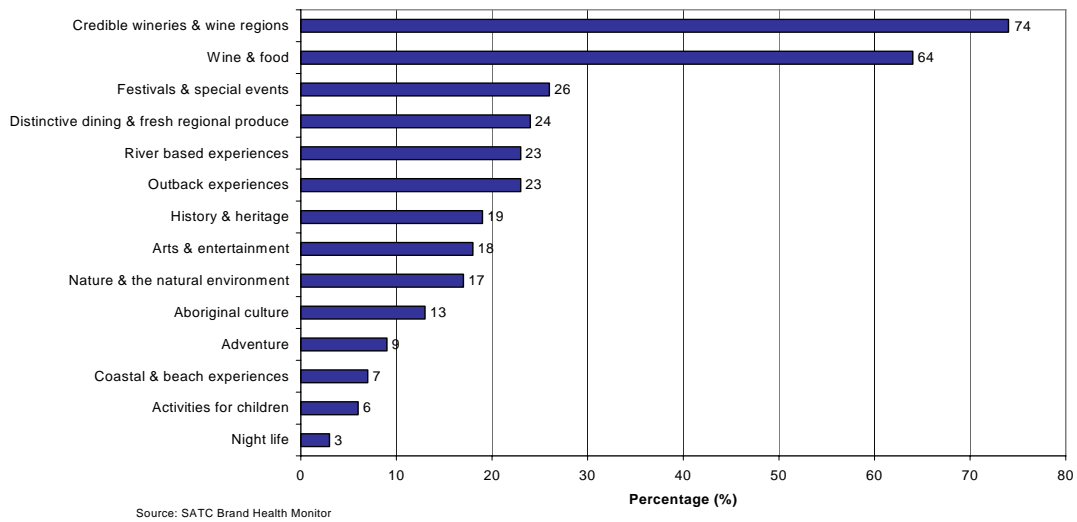
Competitive Position - Melbourne & Sydney - Multiple Response
Wine & Food



Competitive Position - Melbourne & Sydney - Multiple Response
Distinctive Dining and Fresh Regional Produce



Competitive Position Sydney and Melbourne Markets
Percentage associating South Australia with Attribute, 2007
Multiple Response



APPENDIX 2: FOOD AND WINE RESEARCH FINDINGS

Tourism Australia, CRC for Sustainable Tourism, SATC and Adelaide University have conducted extensive consumer and marketing evaluation research in the domestic market over the past 25 years. The key lessons that consistently emerge from this body of work include:

- Apart from Adelaide, 'wine and wineries' is the one attribute that all consumer research, without exception (including that of our competitors), identifies as what SA is best known for. Tourism Australia research indicates that visitation to wineries is increasing at approximately 8% per annum for international visitors, 6% per annum for domestic overnight visitors and 5% for day visitors. In the period from 2000 to 2006 wine tourism was valued at \$666 million, which outperformed the average annual growth for all visitor types.
- In 2006, an estimated 696, 000 international visitors visited a winery, the top two countries of origin being UK (18%) and New Zealand (12%). *Source: Tourism Australia.*
- The five most visited specific food and wine regions within Australia were the Hunter Valley (27.4%), Stanthorpe (19.3%), Yarra Valley (15.5%), Barossa Valley (14.5%) and the Mornington Peninsula (9.2%). *Source: CRC*
- Forty eight percent (48%) of respondents (CRC research) were either very likely or likely to take a food and wine holiday in the next 12 months.
- Different wine regions appeal for different reasons. Individual wine regions could increase tourist numbers to their region by tapping into the various appeal factors specific to their region, whether that be the scenery and natural beauty, the accessibility of the region, the standard of wine, the people and/or the food. That said, the scenery and natural beauty is a major drawcard for attracting wine tourists to many wine regions. *Source: CRC*
- Researchers now recognise the segmentation that exists within wine consumers and 'wine tourists'. CRC have identified the following three involvement segments:
 1. **The Committed Wine Consumer** is a regular purchaser on a weekly basis and tends to buy the higher priced wines.
 2. **The Traditional Wine Consumer** buys regularly, but tends to buy the middle priced range of wines on a regular basis or the higher priced wines less frequently.
 3. **The Uninvolved Wine Consumer** tends to buy the lower priced wines and buys them on an infrequent basis.
- The CRC research advises that a purely demographic approach to segmentation can be misleading as all involved segments have a full distribution of age groups. The study found that visiting wine areas is an important tourism activity.
- Consumers use five main sources of information (newspapers, retailers, journals/magazines, friends and the winery or cellar door) and some people are very frequent visitors (75% had visited two or more times). Additionally, cellar

door staff received an excellent rating for overall service and knowledge. *Source: CRC*

- Cellar Door visitors purchase an average of four bottles per visit with a total average expenditure on all items of \$65.35. It is further revealed that the frequent visitor to the wine region will spend some \$103, which is 59% above the average figure. However, the study also found that the cellar door experience does seem to encourage the Uninvolved Wine Consumer to purchase wine. *Source: CRC*
- The quality of wines provided at the cellar door for tasting is one of the critical factors. The issues mentioned by the cellar door visitor were knowledge of the staff about wines and winemaking, helpfulness and cooperation in services. They were delighted by the staff doing something special, the layout of the cellar tasting area – its traditional appearance, which was also a positive feature, seems to appeal – as well as the setting of the winery in terms of the view, the ambience and the provision of meals. *Source: CRC*
- The main reasons that prompted visits to the wineries include: recommendations from friends, visitor information centres, word of mouth, past experience with wine from the specific winery and being impressed with the quality of wine produced, proximity to the winery/region, prior awareness of the brand and the physical appearance of the winery from the roadside when driving past. *Source: CRC*
- The Adelaide University research indicates that apart from the main purpose of visiting wine regions ‘to taste and buy wine’, visitors also travel for relaxation and the urge to experience a diversity of pleasures in local food and wine. The visitation patterns identified that wine tourists are dramatically motivated in their choice of cellar door through their knowledge and experience of the products, the brands and the need to discover different and interesting products and places.
- Tourism Australia Barossa Visitor Profile
The top two reasons for visiting the Barossa were:
 - Taste and purchase wine (62%)
 - Sightseeing in the area (44%)
- However, paradoxically, the preferred SATC visitor also tells us that wine (and food) is generally not the primary **motivation** for a visit, but is an essential enhancement to a visit.
- For the preferred SATC visitor, being the home of Australia’s wine industry doesn’t in itself translate into a desire (consideration), or decision to travel to SA for a holiday. It has to be about diversity and richness of related experiences.
- Consumers have poor knowledge of South Australia. They do not have a clear ‘geographical mind map’ of the State (i.e. SA is generally perceived as Adelaide / Barossa and a vast arid space beyond that).
- As a result, South Australia is seen as a ‘risk’ destination (i.e. there is a fear that there won’t be enough to see and do to warrant risking their holiday aspirations and scarce time and money).
- There is very little knowledge of other wine regions outside of the Barossa (Clare, Coonawarra, Adelaide Hills and McLaren Vale are emerging in the consumers’

mind set) and this presents both a challenge and a great opportunity for South Australia.

- In recent SATC appeal testing research of those people that found the *'Wine Country'* itinerary appealing, wine is seen as part of the appeal. People are looking for **wine +** e.g. olive orchards, cheese and other products, sightseeing, main streets, shops, antiques, events, food maps, 4+ star accommodation and so on [Source: Project Trend, BDA Marketing Planning, February, 2008].
- Positive attributes that the consumer identifies with South Australia's *'Wine Country'* include the perceptions that it is: accessible, hospitable, diverse, credible, authentic, original, simple, with carefree sophistication providing opportunities to share the locals way of life.
- On the negative side some consumers felt there was nothing distinctive from other winery regions elsewhere. *'Once you've seen one you've seen them all'. 'Only known for wines, bit of an older age feel'. 'If it's just wine its pretty boring'.*
- There is a need to inject more youth, energy, vitality and sense of progressiveness into South Australia generally and its tourism and food and wine tourism experiences. Being laid back, relaxing, 'not tacky' and easy to get around are consistently mentioned positive attributes, but not compelling enough in themselves for more people to make a decision to choose South Australia as a holiday destination.

APPENDIX 3: THE FOOD AND WINE TOURISM MARKET

The Domestic Market

SATC has defined the *Experience Seeker* as the target audience that will contribute most to achieving the tourism target of \$6.3 billion (this segment comprises 14% of the Australian travel market, but significantly accounts for 78% of the tourism spend). Research has identified that *Experience Seekers* are active, and mostly without kids. They like to immerse themselves in the local culture and prefer experiences that offer an intrinsic and internal reward.

Experience Seekers look for:

- Special Experiences: They want a holiday which enables them to connect with the landscapes and the locals, and to reconnect with family and inner self and experiences that will live on as stories they share with friends and family.
- Value: Because they often lead busy lives, they value their own time so it is important to make the most of a holiday. They are willing to spend on a holiday but in return want to feel the holiday delivers with memorable experiences.
- Easy: They will choose holidays that minimise complexity in planning, arranging and undertaking the holiday and the risk that the holiday is nothing but a complete success.
- Choice & Flexibility: They want a range of 'offerings' available in terms of experiences, activities, accommodation, facilities and price points, and then flexibility to customise their holidays by choosing from these diverse elements.
- Guilt Free: They want to satisfy their own needs while at the same time considering people and places with which they interact and impact. For many, this can also extend to feeling guilt free/virtuous about how they treat/nurture their own body/spirit.

Some important specific characteristics of the *Experience Seekers* requirements include:

- *The intensity of perceived connection with the outdoors/natural environment*
- *The depth and range of experiences/that are seen to enhance this connection*
- *Certainty of genuine 4+ star accommodation & facilities that do it in style ...not flashy, but understated luxurious style*
- *Significance of place in terms of heritage, culture, uniqueness or outstanding beauty, and*
- *Room/food and wine with a view and preferably some connection with water.*

[Source: BDA Marketing Planning, 2008]

The key to communicating with *Experience Seekers* includes the Internet (well above average use). Their use of Pay TV, Cinema, newspapers, magazines (interstate) and the ABC is also above average (commercial TV is not favoured).

The Domestic Food and Wine Enthusiast

Food and Wine Tourists are strategically essential to South Australia being recognised as pre-eminent destination for food and wine. It is these people who largely drive aspiration and who become opinion leader advocates for our products and destinations.

Food and Wine Tourists are those that are motivated to travel for food and wine consumption and food and wine experiences, whether they be fine dining, casual

dining, farmers markets, cellar door wine tastings, participating in food and wine festivals and events, enjoying the ambience of food and wine regions etc. Food and Wine Tourists of course have a broad range of other interests, including but not exclusively; natural landscapes, culture, shopping, history and the arts.

The closest we are likely to come to identifying the Food and Wine Tourist is through their consumption of specialty gastronomy/wine media, cooking shows, food magazines and membership of food and wine clubs. The food and wine trades are not only generators of business tourism, but are also important potential advocates for South Australia as a destination.

We also know from the CRC Research that the Committed Wine Consumer and the Traditional Wine Consumer are those most likely to travel to wine regions and those that are the most high yielding.

The International Market

International Experience Seekers

Tourism Australia's 'ideal international visitor', identified through separate independent research, display similar characteristics to South Australia's domestic target market. Also termed *Experience Seekers*, this segment constitutes around 30-50% of all potential long haul outbound travellers from key source markets. They are experienced travellers:

- For whom travel plays a big part in life
- From households with higher than average household incomes
- Seek out and enjoy authentic personal experiences they can talk about
- Are active in their pursuits and come away having learnt something
- Are somewhat adventurous and enjoy a variety of experiences on any single trip
- Place a high importance on value and hence critically balance benefits with costs
- Place a high value on contrasting experiences (i.e. different from their day-to-day lives)
- Desire a high level of engagement with the local people and culture
- Are opinion leaders within their peer and social groups

[Source: Tourism Australia]

Food and wine in itself is not high on Australia's international markets motivation for choosing to travel to Australia, especially those that come from a strong food and wine tradition within their own countries. In this context it is important for food and wine to connect with authentic Australian experiences to provide the point of difference sought.

The key to communicating with the international *Food and Wine Tourist* lies in their avid use of technology in both private and business capacities. They are selective TV viewers, but are higher than average consumers of cable channels, and are predisposed to programs that meet their lifestyle and motivation profiles. Intellectual programs and those with knowledge content are preferred. This audience is also well connected and likes to learn from and share information with their peers.

The International Food and Wine Tourist

Like the domestic *Food and Wine Tourist*, the international enthusiast is a strategic opportunity. High-yielding food enthusiasts are prepared to travel the world to experience the best there is. They value that which reflects a certain rustic aesthetic, which is hand-made, artisan crafted, unadulterated, noble and most importantly authentic.

The best place to shop for these food and wine enthusiasts is direct from the source, and from an expert whose produce is a passion, rather than a mere product. They are the most likely to patronise farmers markets and specialty stores.

Like the domestic *Food and Wine Tourist*, they provide the aspirational leadership within the marketplace and are key advocates for exceptional/cutting edge destinations. As with the domestic enthusiast, they can be identified by their avid consumption of gastronomy/wine media.

APPENDIX 4: SA's TOURISM BRAND FRAMEWORK

Figure 6-8: Relationship between SA's Brand Framework and Food and Wine (see Section 7.0 page 14)

CORE ATTRIBUTES	EXPLANATION AND FOOD AND WINE CONNECTION
<i>Enterprising tradition of creativity and innovation</i>	SA has a unique history. It was founded as an economic and social experiment in a spirit of enterprise and innovation. The characteristics of freedom, tolerance, idealism, lifestyle, passion and hope were an integral part of SA's utopian beginnings as a free settlement and food and wine were a distinctive part of these beginnings. SA has been a pioneer and leader in many fields punching well above its weight as a small State.
<i>Home of exceptional wine and produce</i>	With over 60% of Australia's wine exports and recognition for producing the best quality wines in Australia SA is undisputedly the home of wine. SA also has a strong tradition in food and is aspiring to achieve stronger recognition in this regard.
<i>Beautiful city and a festive spirit</i>	With Adelaide's Mediterranean climate and aforementioned qualities, it has often been tagged the Athens or Tuscany of the south. Descriptions by visiting journalists over the years capture this notion: <i>'the locals enjoy a quality of life second to none, with a relaxed and sophisticated lifestyle that centres round good food, good wine and a good time ... despite being a big city, nowhere else can one be so soon out of the city to experience a beautiful countryside ... people here take winemaking seriously, but they also know how to enjoy life to the hilt'</i> . Wine, food, events and tourism have a natural affinity and synergy.
<i>Unspoilt nature at close proximity</i>	Travellers seek a range of experiences that will provide them with an enhanced connection with the natural environment. Linking food and wine with other appealing attributes – especially nature, coastal and recreational attributes – provide a compelling and delightful attractiveness.

BRAND VALUES	EXPLANATION AND FOOD AND WINE CONNECTION
<i>Clean and Green</i>	The desire to create a sustainable environment is a significant global trend. SA is taking a leading role in this regard and the SA tourism industry through SATC's 'Sustainable Tourism Package', and the Minister's Tourism Round 'Table Sustainability as a Competitive Advantage Strategy' sees this as an integral part of the SA brand. The wine industry is the first sector to sign an Emission Target Agreement with the State Government. Together, tourism, food and wine industries can deliver credible outcomes in this regard.
<i>Living Heritage and Tradition</i>	One of the stronger consumer perceptions about SA to emerge from a wide body of tourism research is its heritage ambience, particularly of Adelaide. The blend of the old and the new in contemporary 'living heritage' provides a sense of continuity and connection with the past, often missing in places with a faster pace of life and change. With food and wine's strong traditions and the emerging 'locavore' (or slow food) trend, there is a great opportunity to build authentic character and visitor appeal. Opportunities to utilise heritage, infused with contemporary expression, and importantly telling the story of SA's past, present and future aspirations, in memorable ways, can bring SA and its food and wine history and products alive to the visitor.
<i>Free Thinking</i>	South Australia's origins as a free settled state where tolerance, civil liberty and opportunity were and still are valued, has imbued the State with a certain 'free thinking' culture and personality. SA has been at the forefront of many social changes from being the first jurisdiction to give women the right to vote to its pioneering and thriving arts and cultural reputation. This is an aspiration of this State.
<i>Genuine & Personal</i>	While participating in a progressive world that is increasing in pace and technological know-how, where people often feel like they've been reduced to a mere number, South Australia is still seen as a safe, warm and friendly place where good service is valued. Retaining this characteristic can be an important competitive advantage in an increasingly uncertain world. The conviviality of food and wine experiences can play a major role in this regard. Meeting the winemaker or passionate producer can be a value added highlight of the experience.

BRAND FILTERS	EXPLANATION AND FOOD AND WINE CONNECTION
<i>Enviably Lifestyle</i>	Tourism consumer research has revealed that while Adelaide is often seen as slow and boring, it is also seen as having an 'enviable lifestyle' that surprises and delights those who come. Described in the research as 'a quietly stated envy, among interstate consumers for SA's lifestyle based on the emotive attraction' of its Mediterranean climate, accessibility, ease of getting around, understated authentic character, relaxing pace and friendly welcoming people, food and wine is integral to this.
<i>Authentic Experiences</i>	South Australia is seen as authentic and down-to-earth. An important part of the food and wine experience will be telling the authentic South Australian story through engaging interpretation, the welcome visitors are shown by the people they meet and promoting a service culture that over-delivers on service expectations.
<i>Inspiring Moments</i>	A key motivation for travel is being able to do something different to that which you can do at home. Travellers respond to discovering hidden treasures, stimulating sensory experiences, discovering new things, and learning about the destination as part of life's journey. Food and wine e.g. arts, events, stories etc is the rich palate from which they can do this.
<i>Good Times</i>	Whether travelling for business or pleasure people seek a good time and fun. They seek to nurture relationships, rediscover loved ones, have time and space for themselves. Surprise, wonder, insight, peace and warm relationships can often be outcomes through conviviality of food and wine experiences. Food and wine experiences are an important component of such experiences – the key lies in positively emotionalising the experience!

APPENDIX 5: FOOD AND WINE TOURISM STRATEGY IMPLEMENTATION SCHEDULE

F&WTWG = Food and Wine Tourism Working Group; SATC = South Australian Tourism Commission; SATIC = South Australian Tourism Industry Council; OS = Other Stakeholders

No.	Strategy	Implementation Action	Responsibility (Lead and Support)	Timing (Completion date)	Resources	How will we know if we've been successful?
1.	Communicate the best of SA's food and wine experiences of today					
1.1	Integrate food and wine as a key experiential theme in SA tourism campaigns	<ul style="list-style-type: none"> Utilise both iconic and emerging food and wine products, hero brands, events and personalities. 	SATC with input from F&WTWG	2009 and ongoing	Existing	See headline KPIs
		<ul style="list-style-type: none"> Develop a South Australian Food and Wine Guide and transition to a collaborative production as it becomes more valued by the market and tourism businesses. 	SATC initially transitioning to private supplier with oversight by F&WTWG	First publication by December 2009	SATC transitioning to self funded	Confirmed distribution and use
		<ul style="list-style-type: none"> Drive food and wine 'devotees' to proposed 'devotee' part of sa.com website (see 3.2). 	SATC and food and wine industries through their marketing	Ongoing from completion of 'devotee' component	SATC as part of sa.com upgrade	See 3.2
1.2	Identify strategic, affordable co-operative marketing opportunities between tourism and food and wine industries	<ul style="list-style-type: none"> SATC provide prospectus for specific industry cooperative opportunities and advice of marketing program to encourage collective and individual leveraging. 	SATC working in conjunction with F&WTWG to establish best mutual returns	Prospectus by end May 2009	Existing SATC and industry consistent with opportunities	Level of industry 'buy-in'
		<ul style="list-style-type: none"> F&WTWG operating under SA Tourism Industry Council (see 4.1) to suggest and communicate opportunities to food and wine industry stakeholders. 	F&WTWG (advice to industry through industry publications and target key prospects)	Consistent with above timing	Existing	Optimal communication

1.3	Promote and further develop Tasting Australia as Australia's most significant food and wine tourism event	<ul style="list-style-type: none"> • Explore the opportunity to grow the Adelaide based Tasting Australia as an iconic consumer event. 	Tasting Australia and Events SA	2010	To be determined	Economic evaluation
		<ul style="list-style-type: none"> • Differentiate this event from the complementary World Food Exchange 2011. 	Tasting Australia, Events SA and other stakeholders (e.g. PIRSA, DTED)	2011	2011 event funded	Both events strong market position
1.4	Identify and promote authentic food and wine tourism products and hero brands via strategic and cost effective public relations activities	<ul style="list-style-type: none"> • Use new and existing innovative food and wine tourism products to retain the markets attention. 	F&WTWG to advise SATC of any new or emerging product	Ongoing	Within existing resources	No lost opportunities
		<ul style="list-style-type: none"> • F&WTWG operating under SA Tourism Industry Council (see 4.1) to advise SA Tourism Commission of new 'hero' products and 'new news' to incorporate into Famils, PR activities and appropriate marketing activity. 	F&WTWG to maintain strong relationship with SATC Media Communications Group and advise of key opportunities	Ongoing	Within existing resources	See 1.1
		<ul style="list-style-type: none"> • Collaboratively target the top food and wine writers in the world 	F&WTWG to identify those in F&W sector that influence famils. SATC to help with priority prospects. RTMs to coordinate story telling.	Ongoing with major thrust 2010	Within existing resources	At least 70% respond
1.5	Continue to promote the integration of food and wine experiences into existing flagship events and pre and post conference and event itineraries	<ul style="list-style-type: none"> • Better leverage existing program of events and conferences (e.g. using ACTA incentives brochure). 	ACTA/ACC F&WTWG to engage ACTA/ACC	December 2009	To be determined	Sales % of conferences/ events
		<ul style="list-style-type: none"> • Ensure recognition of this opportunity in SA Event Strategy currently being prepared. 	SATC	Timed with Strategy development	Within resources committed for Strategy	Appropriate inclusion

2.	Create a more appealing SA food and wine experience of tomorrow					
2.1	Increase the range and appeal of South Australia's innovative food and wine experiences	<ul style="list-style-type: none"> Identify and fill gaps in SA food and wine tourism experiences (including unique dining, gourmet retreats, specialised winery, vineyard and producer tours, intimate tastings and exclusive, personalised experiences, festivals and events and wine & food trails). 	Tourism operators and entrepreneurs. SATC to target priority gaps and provide advice and incentive	Gaps and priorities by May 2009 ongoing implementation	Capital required to be raised by industry	At least \$75 million in strategic tourism and tourism related development by 2014
		<ul style="list-style-type: none"> Ensure Adelaide owns the mantle of Australia's centre for food and wine (e.g. permanent focus; Adelaide Food and Wine Festival). 	F&WTWG to explore gap and opportunities	Concepts by 2010	To be determined	Economic value (new \$s attracted)
		<ul style="list-style-type: none"> Reinvigorate the Barossa and other key regions (ensuring the iconic things remain iconic). 	Private sector Barossa (and other) EDB and Council supported by SATC as appropriate	Commit to major thrust in 2009 and ongoing	New capital for development	Increase Barossa's domestic 'consideration' from 400K in 2007 to 750K in 2014
		<ul style="list-style-type: none"> Help grow strategic local events that celebrate the State's food and wine, and have the potential to attract both the F&W enthusiast and lifestyle visitor from outside the region. 	Regional communities supported by appropriate Government agencies (Identify key opportunities through tourism planning)	Ongoing	Existing Regional Events and Festival Funding Program	
		<ul style="list-style-type: none"> Create awareness of the activities and the evolution of Regional Food Groups (e.g. Farmers' Markets) 	Regional communities	Ongoing	Within existing resources	

2.2	Encourage investment in 4+ star experiential accommodation and conference and meeting facilities within wine regions	<ul style="list-style-type: none"> • SATC as part of its Tourism Investment Attraction program to encourage strategic and innovative projects. 	Developers/Industry. Regional Development Boards and Councils to facilitate. SATC to facilitate and case manage strategic projects.	Ongoing	Capital required Facilitation and case management within existing resources	See 2.1
2.3	Encourage the ongoing development and improvement of existing food and wine tourism experiences and products	<ul style="list-style-type: none"> • Maintain the food and wine tourism infrastructure funding program. 	SATC	Review at end of 2010	Within existing resources	Number of new products
		<ul style="list-style-type: none"> • Undertake continuous improvement of the food and wine experience. 	Food and wine Industry	Ongoing	Access new investment capital	Number of new products
		<ul style="list-style-type: none"> • Encourage SA food and wine regions to benchmark for continuous improvement against other world leading food and wine regions. 	F&WTWG	2011	Within existing resources	New insights and ideas that are executed
2.4	Strategically align the State's planning policy framework to support opportunities for developing authentic food and wine experiences	<ul style="list-style-type: none"> • Target spatial planning frameworks, Better Development Plan, Development Plan Amendments and Designated Primary Production Areas. 	SATC supported by other relevant Government agencies and Local Councils	BDP framework by end 2009. Ongoing in terms of DPAs and emerging policy and legislation	Within existing resources	No desirable strategic developments refused (i.e. greater certainty of outcome upfront)
2.5	Make telling the story about SA's food and wine an outstanding competitive advantage	<ul style="list-style-type: none"> • Access high quality advice and practical tuition. 	SATC advised by F&WTWG Flinders University and other providers	Commence program by January 2010	To be determined	Number of operators using the program
		<ul style="list-style-type: none"> • Leverage SATC initiative of training for storytelling (note this training has business generation measures as key outcomes). 				
		<ul style="list-style-type: none"> • Establish several champions that demonstrate the business return from excelling in authentic story-telling about the product and its locality. 				

3.	Make the South Australian food and wine experience easy to access					
3.1	Bundle and package as appropriate the best of South Australia's food and wine tourism opportunities	<ul style="list-style-type: none"> • Bundle food and wine experiences with other relevant coastal, nature-based, recreation, arts & culture and accommodation holiday experiences or bundle focussed food and wine experiences. • Identify specific trail / itinerary opportunities suitable for national and international markets. • Seek opportunities for national links. 	Food, wine and tourism businesses. Facilitation and advice from SATC Regional Tourism Managers	Major thrust in 2009. Ongoing thereafter	Business development capital may be required. SATC support within existing resources	Number and sustainability of new products
3.2	Develop a specialised 'food and wine devotee' component of the existing sa.com website	<ul style="list-style-type: none"> • Ensure site incorporates quality specialty information, an interactive map and flexible itinerary suggestions including food and wine holidays. 	SATC	Timed to coincide with SATC's website review	Within existing resources	Number of hits on the site
3.3	Strengthen food and wine tourism distribution systems	<ul style="list-style-type: none"> • Identify at least one brand in each region that could get into distribution system. • Develop tools for travelling SA winemakers to promote SA as a food and wine destination (link destination brand & retail) • Work with wine industry to find ways of linking product and place (e.g. brand websites linked to southaustralia.com; have every bottle of SA wine carry southaustralia.com identification etc - see 3.2). 	F&WTWG supported by regional marketing groups	2011	Within existing resources	TBD

		<ul style="list-style-type: none"> Encourage Visitor Information Centres and Regional Tourism Associations to cross promote and link regional food and wine tourism experiences. 	SATC (incorporate into review of VICs)	Timed with implementation of VIC review	Within existing resources	Increase in VIC patronage
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4.	Be creative in working together as an industry					
4.1	Develop stronger working links between food and wine stakeholders (see list of key stakeholders page 23)	<ul style="list-style-type: none"> Achieve industry operational links by transitioning F&WTWG into SA Tourism Industry Council (SATC). 	F&WTWG working in conjunction with SATC	Major establishment phase in 2009 and ongoing thereafter	Within existing resources (possible some additional on project basis)	Development of Tourism Food and Wine Industry Communication Plan
		<ul style="list-style-type: none"> Develop Communication Plan (relevant engagement to deliver the objectives). Link into SATC website as key means of communicating with stakeholders. Develop alliances with complementary tourism sectors such as the arts, regional food production, nature. 				
		<ul style="list-style-type: none"> Forge closer connection between SATC's PR unit and the industry for famils. 	F&WTWG and operators working in conjunction with SATC	2009 and ongoing	Within existing resources	Increase in media exposure
4.2	Build intra and inter regional relationships and share knowledge and information	<ul style="list-style-type: none"> Identify and work with regional advocates who can encourage greater collaboration, communication and information sharing in and among regions. 	F&WTWG supported by SATC Regional Tourism Managers (see 3.1)	2010 major thrust. Ongoing thereafter	Within existing resources	Industry feedback at Minister's Tourism Round Table
		<ul style="list-style-type: none"> Bring food and wine icons and complementary experiences together. 				
		<ul style="list-style-type: none"> Develop cross regional opportunities. 				

5.	Increase industry understanding and professionalism					
5.1	Improve professionalism of operators and business performance	<ul style="list-style-type: none"> • Encourage accreditation or other appropriate business systems as tools for improvement. • Leverage the proposed new operational links with SATIC to encourage operators to seek accreditation. • Use existing accredited operators as 'champions' to encourage operators that are unsure. • Encourage the evaluation of accreditation programs to foster continuous improvement in their value to the consumer and operator. 	F&WTWG working as part of SATIC	Major thrust in 2010	Within existing resources	<p>Number of businesses with appropriate Accreditation</p> <p>Number of businesses engaged in training programs</p>
5.2	Develop career paths in food and wine tourism and keep talent within the State	<ul style="list-style-type: none"> • Leverage the proposed new operational links with SATIC to identify skills gaps. • Support a pilot collaborative training framework between food and wine and tourism that delivers on-job training, and mentoring that focuses on building skills in hospitality and fulfilling visitor needs of interpreting and connecting with the local way of life. 	SATIC working in conjunction with Food, Hospitality and Tourism Industry Skills Council with F&WTWG input	Major focus in 2009 and ongoing	Tap into DFEEST funding for Workforce Planning	Low vacancy rate in growing tourism jobs market

		<ul style="list-style-type: none"> • Work with existing training providers to deliver appropriate, timely and accessible training and to identify and promote career paths. 				
		<ul style="list-style-type: none"> • Identify migrant and backpacker opportunities 				
5.3	Fill gaps in research information on visitor characteristics, satisfaction and opportunities	<ul style="list-style-type: none"> • Develop a research agenda (including better F&W questions on TRA national surveys). 	SATC in conjunction with F&WTWG	Priorities identified by June 2009	Funding as appropriate on project basis	Research value adding to decision-making
		<ul style="list-style-type: none"> • Strengthen participation in the process of acquiring on-line data from cellar doors to provide benchmark and trend information. 	F&WTWG Wine Federation Australia Operator of Cellar Door Metrics	Major thrust in 2009 to get commitment and ongoing thereafter	Existing resources (User pays funded) Current funding runs out end 08/09	Level of buy-in reaches min 30% across State
		<ul style="list-style-type: none"> • Investigate opportunity for charging for premium experience through redemption purchase for tastings. 	F&WTWG with support from the SA Tourism Commission	2010	Project funds to be sought	Competent investigation gives clear direction
5.4	Raise awareness of tourism within food and wine industries and of food and wine within tourism industry	<ul style="list-style-type: none"> • Target key stakeholders (see page 24) with strongly aligned message (i.e. 'make the invisible visible' and the opportunities clear). 	F&WTWG to determine message (s) and use SATIC website and relevant forums	Major thrust 2009 to establish awareness and ongoing	Within existing resources	Levels of industry engagement
		<ul style="list-style-type: none"> • Leverage the proposed South Australian Tourism Industry Council's business-to-business website. 				
		<ul style="list-style-type: none"> • Disseminate research findings and advice and information on food and wine tourism. 				