

Harnessing the tourism potential of wine and food in Australia.



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Department of Resources,
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Winemakers'
Federation of
Australia

A strategic framework for the future of wine and food in tourism to 2020.

Vision

Australia will be recognised as one of the world's must-visit wine and food destinations.

Mission

Position Australia's wine and food as vital and vibrant tourism experiences by expanding, improving and diversifying the product offerings and the destinations they represent.

Acronyms

DMP – Destination Management Plan
EDS – Experience Development Strategies
IVS – International Visitor Survey
NLTTTS – National Long-Term Tourism Strategy
NWTS – National Wine Tourism Strategy (1998)
NTAF – National Tourism Accreditation Framework
NVS – National Visitor Survey
WFA – Winemakers' Federation of Australia

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Foreword.

Wine and food tourism in Australia is at the crossroads. It can continue as a useful add-on for individual operators and a sidebar in regional tourism brochures or we can strive to harness its true business potential to help underpin the next phase of the sector's development.



That means taking a broader view, adopting a consumer mindset and understanding the brand, marketing and sales advantages of inspiring international and domestic visitors to experience our wine and food regions first hand. Research shows there is no better way to leave a lasting impression.

First we need to acknowledge that the key word here is "tourism". Producing good wine and food and offering it with a smile at cellar doors and restaurants is not enough; wine and food regions need to offer a compelling reason for people to visit.

Second we need to think in tourism terms about "product" and "packaging". Potential visitors need to be able to easily identify and choose from a range of tailored options at all price points to suit differing tastes and moods. We are not alone in seeking to attract them.

Third we need to work collaboratively to develop recognisable and marketable destinations, target a variety of markets and market segments, and invest in the necessary support infrastructure – as we would with other areas of business.

If any of us is asked what Australia's wine and food regions have to offer we must be able to provide a simple answer and access to a wealth of detailed information.

There is no doubt the wine sector is a significant contributor to Australian tourism on many levels. It employs thousands of people, contributes to regional development, and sends \$2 billion of branded product every year to sit on overseas dining tables as a great advertisement for Australia.

Our focus now must be on how tourism can be a significant contributor to the health and growth of the wine and food industry. That is what this strategy is all about.

We need to:

1. Increase the number of globally recognised Australian wine and food tourism regions by leveraging the current success of signature regions.
2. Develop clusters of wine, food and agritourism in regional destinations that support sustainable business development.
3. Identify the key domestic and international markets interested in experiencing Australia's wine and food and develop relevant product for each segment.
4. Encourage specialisation of cellar doors to develop diverse experiences that target discrete visitor segments.
5. Invest in the support infrastructure and training / business development programs that will allow us to achieve global standards of excellence in service delivery.
6. Establish a national approach to recognising quality wine and food tourism experiences through appropriate accreditation schemes.
7. Improve the knowledge and understanding of how to efficiently source, use and promote Australian wine and food as part of an authentic tourism experience.
8. Develop and communicate the collective and individual stories of Australia's wine regions through wine and food tourism experiences.

Peter Schulz

President, Winemaker's Federation of Australia



Background.

In late 2009 the Winemakers' Federation of Australia (WFA) was successful in obtaining an Australian Government TQUAL Grant to revise and update the 12-year-old National Wine Tourism Strategy (NWTS) and create a framework for the next phase of wine tourism's development.

The project was undertaken in the context of broader tourism industry planning, visitor trends and expectations, and how wine fits into the tourism offering. It followed closely on the release of a *National Long-Term Tourism Strategy*, which sets out the need to improve the quality of tourism experiences and focus on destination management and planning.

In implementing the original NWTS, WFA focused on the need to develop greater industry understanding of the value of wine tourism and provide relevant skills, tools and information to support continuous improvement. Significant growth and improvement was the result.

Importantly, the project team also took into account broader issues, challenges and opportunities for the wine industry, from changing global demand and competition to the increasing need for wine businesses to be environmentally, socially and economically sustainable and attuned to modern expectations around business values.

This document was developed after national consultation and significant research into trends in other industries and other countries. It is designed as an enabler for agencies and sectors to play their part in developing a prosperous and vibrant wine and food tourism sector in Australia.

The framework will allow core strategies and actions to be implemented at all levels of enterprise and industry as well as all levels of government and their agencies. The wine, food and tourism industries all have a leadership role to play.



Following a review of the Jackson Report into tourism, in December 2009 the Commonwealth Government released a National Long Term Tourism Strategy, with the Minister stating that:

"The success of Australia's tourism industry depends upon action on both the supply and demand sides of the equation. It is pointless to create new demand if Australia's tourism industry does not have the productive capacity to meet it. Supply-side issues must be given a heightened importance in shaping the future of tourism to ensure Australia's competitiveness".

The need for change.

Since the release of the first National Wine Tourism Strategy in 1998 the concept of wine tourism has grown and matured in Australia. The number of cellar doors has doubled, many have moved beyond the simple pouring of wine to offer more diverse experiences, and most are now a central part of the tourism offering in dozens of regional areas.

During this same period, many states and regions have begun to focus on the provenance of local food and produce and cellar doors have played a lead role in introducing regional food to visitors. There are challenges, however.

On the supply side, the explosion in the number of cellar doors during a period of lower demand and increased access to wine products and experiences in cities and urban centres has led to increased competition for visitors. While this investment by industry has increased the appeal of wine regions as holiday destinations, there is pressure to sustain this development and attract greater numbers of domestic and international visitors who enjoy wine and food as a lifestyle and holiday activity.

On the demand side, regional areas have been hardest hit by a decline in Australia's share of global tourism – a trend that is predicted to continue over the next decade.

Our dollar is strong, our brand has lost some of its must-go lustre and, in an Internet-driven world, we are not offering packages that appeal.

Consumer behaviour has changed dramatically in the last 10 years as people focus less on the actual product or service and more on the experience created by the product or service. This new “experience economy” has impacted the type of holidays being sought as people look for real experiences that incorporate enriching activities and adventures that represent high value and imbue them with “bragging rights”.

Traditionally the wine industry has been the beneficiary of wine motivated visitors seeking out brands in wine regions. However, consultation and research as part of this national project has made it clear that if the wine industry is to maintain its tourist appeal, and move to the next level of fully leveraging its tourism opportunity, it must:

- A** *Become more tightly entwined with Australia's tourism development and embrace the concept of wine in tourism*
- B** *Maximise the potential of the wine and food nexus with the aim of creating a genuine culinary tourism capability*
- C** *Diversify the wine tourism offering to incorporate more options, in more regions, for a broader range of visitor segments.*

Wine in tourism.

The wine sector traditionally has regarded tourism as a channel to connect with consumers, build relationships and increase sales. It would benefit more significantly if it were to collaborate in activities that can be packaged and bundled to add value that augments the Australian tourism experience.

Wine plays a significant role in a tourism industry that contributes \$33 billion a year to Australia's GDP. In 2009, international and domestic overnight winery visitors spent a total of \$7.1 billion. In turn, tourism is particularly important to regional areas, where it generates more than 200,000 jobs. 46 cents in every tourism dollar is spent outside our major cities.

There is, however, potential to further increase the presence and significance of Australian wine as part of the broader – and changing – Australian tourism experience.

The recently developed *National Long-Term Tourism Strategy (NLTTTS)* moves beyond demand building activities to focus on supply-side issues of the development of tourism product and experiences. Tourism Ministers have committed to working towards achieving the 2020 Tourism Industry Potential – a scenario for stronger growth. If achieved, the 2020 Tourism Industry Potential will see tourism double its overnight expenditure by 2020. The growth targets will require investment in infrastructure and inventory; not just accommodation and transport, but the development of experiences that tell a story

and provide a compelling reason to convert interest into bookings.

The opportunity for wine tourism destinations is to leverage the wine experience and connect it with the other narratives around food, landscape and culture to create compelling reasons for visitation.

As the table below shows, 660,000 international visitors went to at least one winery during their stay in Australia in 2009, yet this represents only 13% of total visitors. For the key Asian markets of Japan and China, the figures were 8% and 10% respectively. There is clearly opportunity for growth.

Country /region of origin	Winery visitors ('000)	Proportion of winery visitors*(%)
United Kingdom	139	22
USA	68	15
New Zealand	53	5
Singapore	44	18
China	35	10
Korea	33	20
Malaysia	28	14
Japan	26	8
Canada	25	21
Germany	24	16
Scandinavia	15	19
Switzerland	9	23
India	7	6
Other Europe	60	16
Other Asia	63	12
Other countries	30	8
Total	660	13

*Wine visitors as a percentage of total visitors from each country.



Wine in tourism is the strategy of highlighting wine as a key ingredient in the Australian story, i.e. the enjoyment of wine with a well-promoted sense of place that can then lead to pilgrimages to regions and places of production.

It is also about integrating wine as a key ingredient for visitor enjoyment and satisfaction, wherever they travel, eat or socialise in Australia.

And it appeals to many visitors, not just those who travel for the primary experience of tasting wine.

"Wine offers a taste of place and acts as an ambassador for place."

The wine / food nexus.

Regardless of their destination, activity, demographic, mindset or motivation for travel, all visitors eat and drink. The key is to create the link between the restaurant table and the cellar door or farm gate; transforming wine and food from merely “fuel” to an experience that reaches into and reflects the culture of its locality – its sense of place.

Wine and food ranks highly in *National Visitor Surveys* and *International Visitor Surveys*. Despite this, very few destinations in Australia offer a genuine, high-quality wine and food tourism experience. Some regions are much more highly developed than others, but even in these regions linkages with food at the cellar door are limited – or separated entirely in the form of restaurants.

Despite Australia’s reputation for high quality produce, food tourism is embryonic and the concept of culinary tourism barely acknowledged. Farmers and other food producers are much less likely than winemakers to value-add or engage in direct sales to consumers or visitors.

Wine and food tourism has often struggled to gain either prominence in marketing activity or the support needed to develop its true potential. This is slowly changing as the wider tourism industry appreciates the “add on” value of wine and food in selling any tourism experience, through direct returns and the positive satisfaction it imbues.

The challenge for the wine sector – and thus the driver behind key initiatives in this strategy – is to recognise the potential value of a genuine wine/food nexus then make it a reality.

That means more than simply offering food at a cellar door or asking a local producer to promote wine. It is about developing authentic regional experiences that bring together wine and food and understanding the potential for food-related attractions (and the broad appeal of food) to increase knowledge and interest in wine.

It also means encouraging and assisting the tourism, hospitality, restaurant and catering sectors to tell the regional story and connect visitors with the source of their wine and food. When a reliable regional supply is developed, these high quality ingredients then start influencing the menu and offerings at urban restaurants and hospitality venues. Providing wine in a social context, complemented by food, also supports the wine industry’s obligations to encourage responsible drinking habits and market its product wisely.

A strong wine / food nexus serves wineries and wine and food regions by:

- > Increasing destination appeal
- > Enriching the wine discovery experience
- > Introducing visitors to wine via their interest in food and vice versa
- > Encouraging collaborative marketing
- > Providing more profitable returns through diversified offerings
- > Setting the stage for Australia to become a culinary tourism destination



More options, more appeal.

Authentic, memorable experiences and quality customer service are fundamental. Greater collaboration is needed between sectors and operators to ensure the offering meets or surpasses visitor expectations and positions Australia as a globally competitive wine and food destination.

Wine tourism has obvious appeal to those who love wine, and this has brought rewards for our highest profile regions. The challenge now is to broaden wine tourism to:

- > Attract a greater range of visitors
- > Make it a central part of the development of all wine regions
- > Transform the experience from “nice” to “exciting”
- > Incorporate Australian wine and its sense of place into the tourism mainstream.

There are two key issues. The first is the vast difference in development of the regions and the many cellar doors that operate within them. This variation at enterprise and regional level reflects the relative development or maturity of the destinations and tourism products offered in general.

For many wineries tourism is a vital route to market, enabling interaction with consumers and the ability to create brand loyalty and ultimately sell wine; they see themselves as tourism operators.

Others still see their cellar doors as simple retail outlets, and offer little to inspire customers to make a journey to buy wine they could otherwise get at their local liquor store.

Similarly, while some regions have built destination appeal and recognition around the reputation of their wine brands, others hope reputation alone is enough. Australia needs more wine regions whose names are known by – and attractive to – more than simply wine connoisseurs. And these regions need to work together to create and promote a sense of enjoyment and discovery that will become a must-do experience in Australia.



The second issue is that research shows regional tourism products and experiences have not kept pace with visitor expectations and preferences. Consumer and visitor attitudes towards the standard of service expected and the quality of the

experience on offer when visiting regional destinations, including cellar doors, has risen substantially. Experience offerings need to be expanded to include additional complementary activities, packaged to appeal to a broad range of visitors and expertly delivered.

Attracting and retaining well-trained, efficient staff continues to be a key issue for enterprises in the tourism and hospitality sectors. A general lack of professional recognition for many jobs in tourism and hospitality is a key factor that creates barriers for effective delivery of international standards of service that urgently requires addressing.

The wine industry needs to work with the food and tourism sectors to:

- > Substantially increase the number of recognisable wine regions that have genuine destination appeal
- > Target distinct visitor segments and develop wine and food augmented experiences that match expectations
- > Improve the scope and richness of experiences offered
 - a) by cellar doors individually and
 - b) in partnership with other tourism operators
- > Promote collectively through a central authoritative portal

Making it happen.

For Australia to become known as a globally recognised culinary destination in its own right – embracing all that Australian wine and food represents – it must work collaboratively to transform its reputation as simply a producer of quality products to a highly desirable destination to visit.

Next generation winery visitors:

In 2009, 30% of international winery visitors were aged between 20 and 29 years.

Internet marketing essential:

In 2009, the internet was the most popular information source for both international (52%) and domestic overnight winery visitors (49%).

(Source: TRA Snapshot, Food & Wine Tourism in Australia 2009)

This can be achieved by integrating wine and food products with Australia's iconic tourism experiences, developing signature wine and food experiences offered in regional and urban settings, packaging with complementary leisure activities and vigorously marketing these as reasons to visit.

Australia has great wine that is recognised globally; it also has great food but not a singular recognised cuisine so it lacks a culinary identity that other countries enjoy. The challenge for Australian producers, product developers and marketers is to build expectations and convey a consistent message that raises awareness among consumers and inspires them to travel.

This means engaging and communicating with consumers through their preferred media and distribution channels; it means building capability among wine and food tourism operators; and it requires real commitment and collaboration between industry and government agencies to fully realise Australia's capacity to become *one of the world's must-visit wine and food destinations.*

Australia needs to revolutionise the way it thinks about wine tourism.

The focus of our efforts must be to offer compelling, high-quality wine and food tourism experiences that reflect the distinctive attributes of Australian wine and food regions, exceed visitor expectations, and demand attention.



Core Strategies.

1. Develop: Build a cohesive, focussed and sophisticated wine and food tourism industry

2. Grow: Expand our wine and food tourism offering in size, diversity and market reach

3. Promote: Market regional wine and food experiences as genuine holiday choices for a broad range of visitors

4. Engage: Recruit, educate and empower new ambassadors for regional wine and food

5. Skill: Educate and retain a skilled workforce of motivated, qualified personnel

6. Inform: Generate the knowledge needed to underwrite success



"Wine and food tourism encompasses travel primarily motivated by, or characterised by, wine and food leisure experiences that derive from the specific production, social or cultural dimensions of the destination."

Roles for enterprises, industry and government agencies

This document sets out a clear vision for the future of wine and food tourism in Australia and the six core strategies for getting there. All wine and food tourism businesses and regions and all levels of government have a role to play in their implementation.

The nature and level of engagement will differ for each state and region depending on its current scope and scale and its future aspirations.

The national agencies for wine, food and tourism will take a lead role in determining the priorities and setting the agenda, but it will require significant endeavour by individual businesses and collaboration at regional and state level to achieve genuine outcomes that ultimately change the game and set Australia on the path to becoming a globally recognised destination for wine and food.

1. Develop:

Build a cohesive, focussed and sophisticated wine and food tourism industry

- 1.1** Establish a skills-based leadership council to represent and advocate for the wine and food tourism industry and drive its growth.
- 1.2** Create/maintain wine and food tourism advisory committees in all states to work with government agencies responsible for the development and promotion of wine, food and tourism.
- 1.3** Ensure the wine and food industry is integral to regional Destination Management Plans (DMP), Experience Development Strategies (EDS) and marketing initiatives.
- 1.4** Encourage the food industry to align with regional development and marketing, where appropriate, with established wine tourism regions.
- 1.5** Build consumer confidence through the establishment of an accreditation system that authenticates local/regional food products
- 1.6** Campaign to protect the “primacy of agriculture” in regions where the wine and food industry is established or offers the best option for regional investment and development.
- 1.7** Advocate for land-use planning regulations to allow for multifunctional farming on agricultural land.
- 1.8** Support investment in value-adding wine, food and agri-tourism ventures.

Wineries and regions can survive in isolation but tourism can only enhance the industry's future through a coordinated approach.

- > Collaborate within and across regions at enterprise and agency level
- > Highlight the importance of dispersal and yield and the impact on regional economies
- > Emulate global standards of culinary tourism excellence



2. Grow:

Expand our wine and food tourism offering in size, diversity and market reach

- 2.1 Develop a network of high-quality, recognisable and marketable wine and food destinations across the country that provides a diverse range of options for culinary travellers.
- 2.2 Ensure each wine and food destination is unique in its appeal but uniform in understanding the demands of tourism and what motivates modern visitors to travel.
- 2.3 Work with emerging wine and food tourism regions to develop relevant infrastructure, networks and cross-sectoral experiences that increases propensity for visitation, and value-add sales.
- 2.4 Develop a suite of wine and food tourism products for specific market segments that match the scope and scale of the region's potential.
- 2.5 Create compelling and authentic regional wine and food brand identities that can be communicated consistently to consumers through a range of media channels by all stakeholders.
- 2.6 Establish programs to encourage and support continuous improvement of wine and food products and packages and highlight their relevance to suppliers and consumers
- 2.7 Create regional systems and networks to guarantee the supply and efficient distribution of local wine and food to a region's tourism, hospitality, restaurant and catering venues and local community.
- 2.8 Scope the introduction of a staged industry-endorsed accreditation scheme that aligns with the National Tourism Accreditation Framework (NTAF) and delivers real benefits to industry participants while building consumer and visitor confidence and demand.
- 2.9 Provide knowledge, resources and programs for operators to build sustainable business models incorporating best practice wine and food tourism experiences and partnerships.

We cannot create a marketable wine tourism industry if our strengths are confined to a few recognised destinations. We must aim to make world-class experiences synonymous with Australian wine regions.

- > Showcase best practice wine and food tourism regions
- > Demonstrate the diversity and appeal of regional experiences
- > Increase business capability
- > Ensure wine and food tourism enterprises are 'business-ready' to participate in tourism accreditation, awards and marketing programs



3. Promote:

Market regional and state wine and food experiences as genuine holiday choices for a broad range of visitors

- 3.1** Work with tourism agencies to ensure wine and food experiences are well packaged and clearly defined, demonstrate provenance and can be promoted as central to the Australian tourism experience.
- 3.2** Strengthen the connection between Australia's primary and emerging wine and food export markets as sources of leisure and culinary visitors.
- 3.3** Work with internationally recognised wine and food industry organisations to foster relationships that will enhance and promote Australian wine and food tourism.
- 3.4** Promote Australia's signature wine and food tourism destinations through dedicated marketing campaigns aimed at international and domestic culinary tourism travellers.
- 3.5** Ensure specific products are developed for identified target markets that match the scope and scale of the region's potential.
- 3.6** Develop engaging and coordinated cross-sectoral collateral that promotes the diversity of wine and food tourism packages being marketed within both a regional and a national context.
- 3.7** Articulate regional wine and food stories that allow international and domestic consumers to connect products with tourism destinations, demonstrate a "sense of place" and convert awareness to actual visitation.
- 3.8** Support regional wine and food showcase events in urban locations to encourage consumers to visit the source and promote wine and food experiences at international visitor arrival and departure points.
- 3.9** Ensure wine and food tourism enterprises and their products are accessible and feature prominently through online media channels at regional, state and national level.

Creating successful tourism experiences is governed by what people want to buy, not what destinations want to sell.

- > Encourage cross-sectoral collaboration to package and bundle wine, food, wine and tourism products
- > Focus on segmentation by developing experiences and packages based on consumer preferences
- > Reinforce the concept of 'paddock to plate' through festivals and showcase events



4. Engage:

Recruit, educate and empower new ambassadors for Australian wine and food

- 4.1 Inspire Australian tourism, hospitality, restaurant and catering venues to showcase regional wine and food by highlighting the options and benefits.
- 4.2 Create high-quality marketing and information materials that will assist venues and retailers to promote regional wine and food to consumers in a way that encourages them to visit the source region.
- 4.3 Seek to have the wine and food industries represented on national, state and regional tourism boards to ensure relevant objectives are integrated into planning processes.
- 4.4 Integrate tourism into the policies and programs of national, state and regional wine and food industry organisations.
- 4.5 Work at national, state and regional level to develop or improve policies and programs that promote the use of wine and food from regional areas.
- 4.6 Encourage education and training providers to include sourcing, using and promoting Australian wine and food in the curricula for tourism, catering and hospitality courses.
- 4.7 Develop exchange/familiarisation programs to let regional wine and food producers directly tell their stories to tourism, hospitality, restaurant and catering professionals.
- 4.8 Work across regions and at state and national level to participate in wine and food familiarisation programs for domestic and international media.
- 4.9 Develop direct-to-consumer social media campaigns that highlight the diversity of Australian wine and food tourism experiences.
- 4.10 Encourage restaurateurs to prominently feature Australian wine and food on wine lists and menus.

Everyone who buys, sells or writes about our products and regions can become part of our promotional activities if we give them the stories to tell.

- > Encourage Australians to promote Australia
- > Ensure the next generation is committed to showcasing regional diversity
- > Go direct to consumers with offers of discovery and excitement



5. Skill:

Educate and retain a skilled workforce of motivated, qualified personnel

- 5.1** Develop and promote genuine career pathways in the wine and food tourism industry.
- 5.2** Provide targeted, accessible, affordable and recognised training programs that reflect current Australian competency-based standards for the wine, food, hospitality and tourism sectors.
- 5.3** Foster continuous business improvement by encouraging participation in professional training and skills development relevant to the requirements of operators.
- 5.4** Introduce an industry-recognised certification model that highlights and promotes the professional nature of various roles in the wine, food, tourism and hospitality sectors.
- 5.5** Work with schools, universities and vocational education providers to offer work experience and placements for qualified and interested students where appropriate.
- 5.6** Facilitate the development and maintenance of Australian competency-based standards that meet the requirements of wine, food, tourism and hospitality enterprises.

Tourism is about service. We need to pay as much attention to our people as we do to our products if we are to match global standards.

- > Offer careers, not just jobs
- > Make a commitment to modern standards across the industry
- > Generate a sense of excitement that makes wine, food and tourism industries of choice



6. Inform:

Generate the knowledge needed to underwrite success

- 6.1 Implement a wine and food tourism research agenda that focuses on industry needs and knowledge gaps and requires projects to produce “industry relevant” outcomes.
- 6.2 Seek partnerships with relevant tertiary and government agencies to obtain ad-hoc and ongoing funding for projects that align with the key strategic objectives.
- 6.3 Establish communication pathways that ensure research knowledge is translated into resources and programs reach stakeholders at all points in the supply chain.
- 6.4 Establish a development framework for wine and food tourism regions that provides a tangible pathway for enterprises, local and state government and regional organisations.
- 6.5 Deliver extension programs based on case studies, commissioned research and industry resources that encourage product innovation and meet the requirements of individual enterprises and regions.
- 6.6 Support funding applications by enterprises and regions that reflect product innovation and genuinely contribute to the sustainable development of Australian wine and food tourism and align, where appropriate, with DMPs and EDSs.
- 6.7 Establish a standard benchmarking and data collection system applicable to the wine, food and agri-tourism sectors and expand the current wine industry data collection system to accurately calculate and report the value of wine tourism annually.
- 6.8 Commission and share consumer research to ensure wine, food, tourism and hospitality providers and organisations are aware of relevant emerging trends and consumer choices.
- 6.9 Benchmark Australian products, services and marketing against wine and food experiences offered in key competitor markets such as Europe and the US.
- 6.10 Seek to include specific questions about wine and food experiences in Tourism Research Australia’s annual *National Visitor Survey (NVS)* and *International Visitor Survey (IVS)*.

Tourism is no different to any other business activity. We need to understand the costs and benefits and stay attuned to trends and developments.

- > Highlight the current and potential economic value of wine and food tourism and the return on investment
- > Commit resources to staying informed and developing sustainable regions
- > Ensure research brings tangible outcomes for industry



Next steps.

Australia has a long-term goal to become a globally-recognised wine and food destination.

The only way we can achieve this is to adopt the three key themes that are at the heart of this strategy:

- > Act collaboratively
- > Promote collectively
- > Deliver individually.

By focusing on product development and acting on these themes we will harness the potential of wine and food in Australia.

Initially, the four key stakeholder organisations – Winemakers’ Federation of Australia, Wine Australia, Tourism Australia and Restaurant & Catering – will identify their key areas of influence for direct action and play the role of catalyst in the establishment of a ‘leadership council’ and the allocation of resources to develop an Implementation Plan.



Acknowledgments.

Consultation Process

The Winemakers' Federation of Australia (WFA) engaged the services of a consulting company, Leisure Futures, and Southern Cross University to develop the strategy based on extensive research and consultation via a series of state consultation workshops with key stakeholders representing the wine, food, tourism and tertiary sectors and government agencies.

This project is an Australian Government funded initiative under *TQUAL Grants*. A key component of the project was to revise and update the National Wine Tourism Strategy.

A skills-based Steering Committee developed the consultancy brief and formulated the strategic framework. Meetings were held in September 2010 and March 2011.

State Stakeholder Workshops were held in Victoria, South Australia, Queensland, Tasmania, NSW and Western Australia between September 2010 and March 2011, with more than 100 representatives contributing ideas and providing feedback.

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Special thanks are extended to wineries that participated in the *2010 Cellar Door Research Survey* and attendees at the six State Stakeholder Workshops.

Photography

- > Barossa Grape & Wine Association and Dragan Radocaj
- > McLaren Vale Grape Wine Tourism Association
- > Wine Australia
- > Winemakers' Federation of Australia





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