'GOOD LIVING' TOURISM
selected wine and food regions of Queensland, South Australia & Victoria

Beverley Sparks, Marg Deery, Linda Roberts, Jenny Davies, Lorraine Brown & Jane Malady
Technical Reports

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ABSTRACT

This report outlines the findings of case studies conducted in Queensland, South Australia and Victoria as part of a broader project investigating the ways in which regional tourism is enhanced and developed through integrated food and wine strategies. This analysis is based on exploratory visits and in-depth interviews with key stakeholders and leaders in a number of wine tourism regions in these three states. The aim of this study was to develop an understanding about the issues facing food and wine regions, whether they are established or emerging as tourism destinations. A case study approach was used, entailing the collection of information on regional products, the levels of collaboration within the regions, the leadership of ‘regional champions’ and the importance of brand recognition and development.

A number of core elements are identified that are required for wine tourism to develop and flourish. These include a suitable resource base, grape production, wine making, accessibility to the region and its wineries, and essential visitor services such as transport, accommodation, dining and information. Other important elements include, but are not limited to, interpretation of the region, wine-making and the wines; tours, festivals and events; and authentic regional architecture and heritage attractions. In line with this, one of the themes emerging from this research is the importance of developing tourism clusters. Such strategies rely on collaborations between operators within a compact geographic area to provide products that enhance the overall food and wine experience.

This report discusses these elements in the case study regions, summarises key themes that emerged from in-depth interviews and site visits, and outlines recommendations resulting from the project.

ACKNOWLEDGEMENTS

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- Griffith University
- University of South Australia
- Victoria University
SUMMARY

The aim of this study was to develop an understanding about the issues facing food and wine regions, whether they are established or emerging as tourism destinations. A case study approach was used, entailing the collection of information on regional products, the levels of collaboration within the regions, the leadership of ‘regional champions’ and the importance of brand recognition and development. The following discussion provides some guidance for the development of a successful food and wine region.

Objectives of Study

This project investigates the important role food and wine plays in attracting tourists to a destination. In particular, the project provides information about what constitutes a successful food and wine region. The major benefit of this project is that it will provide information that can be used to further develop and market food and wine regions, as well as:

- Identifying the attributes of internationally recognised food and wine regions;
- Developing detailed knowledge of product extensions in food and wine regions; and
- Enabling development of a plan to address the issues of marketing, communication and dissemination of consumer information.

Methodology

The project involves case studies of the Sunshine Coast and South Burnett regions in Queensland, the Yarra Valley and Macedon Ranges regions in Victoria; and the Barossa and Adelaide Hills regions in South Australia. Site visits were conducted to audit the tourist product offered in these regions and to conduct in-depth interviews with key stakeholders. Statistics on accommodation and wine and food outlets were collated to provide an overview of what these regions offer and to allow comparative analysis among them.

Key Findings

In summary, the case study of the Sunshine Coast/Noosa region found:

- A well-established restaurant and accommodation scene;
- A growing number of wineries – emerging wine tourism region;
- Predominance of owner/operators moving to the region for a lifestyle change;
- Service quality an issue being addressed in the Noosa tourism strategy;
- A number of key events such as Noosa Long Weekend to promote the region’s wine and food;
- Growth in the local food product, with a large number of organic growers;
- Local markets held on a weekly basis focusing on local product;
- An ambience and natural beauty combined with ‘lifestyle’ product offerings;
- A number of food and wine associations working collaboratively to promote the region’s food and wine product;
- A regional tourism organisation actively promoting the region’s food and wine product; and
- A diverse range of products, some of which are sold nationally, e.g. Gympie Farm Cheese and Spirit House products.

In the South Burnett region:

- An increasing number of wine enterprises with limited food enterprises to support increased visitation;
- A growing number of farm stay and B&B accommodation in a widely dispersed geographical area;
- A lack of collaborative activity among these enterprises other than the planning and development of regional festivals within each shire;
- An authentic visitor experience including heritage sites and natural beauty;
- A region with a history in agriculture rather than viticulture;
- A need for the region’s food, wine, accommodation and attractions enterprises to work collaboratively to develop the region’s tourism product;
- A need for clustering of the region’s product offering;
- A need for the five shire councils to work on a collaborative food and wine tourism strategy;
- Unique regional products, including olives, nut and olive oils, Red Claw crayfish, cheese and peanuts;
• A small number of stakeholders within the region taking a leadership role in developing and promoting the regions wine and food product;
• A number of key events, such as the Shakin’ Grape festival, to promote the region’s wine and food;
• A regional tourism organisation active in the development of the food and wine tourism product; and
• A need for training of tourism operators, lack of signage, wide geographical dispersion and inconsistent opening hours were identified as barriers to development of tourism.

The study of the Barossa found:
• This is the best known wine region in South Australia with 70 wineries;
• Predominance of bed and breakfast accommodation;
• Many of the wineries are very well-established – first plantings in 1842 – ranging in size from very large (Jacob’s Creek) to small (Rockford);
• Many key events, such as the Barossa Vintage festival, promote the region’s wine and food product;
• Very successful Barossa Farmers Market held weekly distributes local product;
• A number of iconic wine and food enterprises;
• A higher proportion of tourists to the region visit wineries than in any other region;
• South Australia positioned as the place to visit for food, wine and festivals – Barossa is a large component of this attraction;
• Authentic rural environment enhanced by German heritage;
• The regional food group, Food Barossa, is a pioneering regional food brand for Australia;
• Products unique to the region include smoked meats, dried fruits, olives and vinegars;
• Collaboration is evident in both the food and wine industry and among other tourism stakeholders in the planning of regional events; and
• Throughout its history and today, the region has seen notable champions leading the region’s development and promotion.

The case study of the Adelaide Hills found:
• An ambience and scenic beauty;
• A well-established premium food producing region – bakeries, fruit, cheese, olives, honey, etc.;
• First vines planted in 1839 – now over 50 wine labels – however it is still an emerging wine tourism region;
• A large number of country markets dispersed throughout the region;
• Key icon events including the Adelaide Hills Harvest Festival;
• The food, wine and regional development groups are working collaboratively to develop the region’s brand; and
• Collaborative planning required to promote the region’s food and wine, while maintaining and promoting the differentiated product offering of the sub regions.

In the Yarra Valley the study found:
• A substantial amount of growth in food, wine and accommodation enterprises within the region;
• Established food and wine tourism destination;
• A number of food and wine associations;
• Unique products, such as the Yarra Valley cheeses, that attract visitors to the region;
• An ambience and natural beauty that attract visitors to the region;
• A diverse range of products that should be promoted to different markets, particularly interstate and internationally;
• A number of key events, such as Grape Grazing, that promote the Yarra Valley brand;
• A number of large icon wineries;
• A lack of accommodation within the region at peak periods;
• A need for food, wine, accommodation and attractions to work together for the promotion of the ‘Yarra Brand’;
• A need, by the local community, to promote the region with an integrated strategy; and
• A number of leaders within the region that have assisted in the promotion of the Yarra Valley product.

In the Macedon Ranges, the case study found:
• A growing number of new wineries;
• A number of iconic attractions, such as Lake House restaurant;
• The development of a food group, Daylesford Macedon Produce (DMP), that focuses on regional foods and wines;
• A substantial amount of accommodation to cater for all types of visitors;
• Unique products, such as the Kyneton olives and Holgate’s beer, that attract visitors to the region;
• A small number of leaders within the region who are keen to promote the regional food and wine;
• A number of key events, such as Budburst, that promote the DMP brand; and
• A diversity and beauty of natural scenery.

Overall Findings

Key products were found in all regions that enhanced the development of the region as a place for the food and wine tourist. These can be categorised as follows.

**Special Food Attractions**

In the regions examined, the following attractions encouraged visitors to the region by using and showcasing local ingredients:

• Yarra Valley Diary – handmade cheeses in French and Italian styles (Yarra Valley, Victoria)
• Sweet Decadence – specialises in handmade chocolates that are made onsite and specially packaged for the customer (Daylesford, Victoria)
• Gympie Farm – fresh and matured goat’s cheese as well as European-style cultured butter (Noosa Shire, Queensland)
• Slow Food Noosa – includes an organic garden and kitchen and a bush tucker garden (Noosa Shire, Queensland)
• Bella Villa Farm – an aquaculture farm cultivating Red Claw and freshwater crayfish (South Burnett, Queensland)
• Maggie Beer Products – the products are based on a philosophy that they are regional and authentic (Barossa Valley, South Australia)
• Springs Smoked Seafoods – offers a large range of smoked seafood, including traditionally smoked salmon (Mt Barker, South Australia)
• Stuart Range Estate – nut and oil processing, cheese making and winery

**Wineries**

The wineries that were perceived as successful in terms of wine tourism tended to have cellar door activity and offered other facilities such as restaurants and cafés, accommodation, the sale of local produce and additional attractions such art galleries. Other elements of successful wineries included winery tours and providing open viewing of the wine-making processes.

**The People**

One of the key components to the successful development of a wine and food region was the energy and passion of key leaders in the communities. The main attributes of these people appear to be:

- A vision for the region;
- Energy, passion and belief in the products of the region;
- The ability to bring other community members together;
- Pride in the region;
- A level of risk taking; and
- An understanding of entrepreneurship.

**Future Action**

All regions in these case studies have substantial potential for further development. What appears to be important in all regions is the integration and coordination of a strategic plan that will continue to promote and develop the region and its key attributes. In particular, it is recommended that there be:

- The appointment of an overarching body to promote food and wine as tourism attractors in each region;
- The development of alliances within and between regions to provide economies of scale as well as variety for visitors;
- A key attribute (or perhaps two) that represent the region for simplicity of promotion;
- A focus on providing regional food and wine at all establishments within the regions to promote the uniqueness of the regional product;
- Improved promotional information, especially accurate hours of opening;
- The need to develop an authentic, differentiated and exciting product that will attract experienced tourists to the region; and
- An understanding of the need for a sustainable region.
Chapter 1

QUEENSLAND: NOOSA AND SOUTH BURNETT REGION

A case study in two regional locations in Queensland\(^1\) was conducted as part of a broader project investigating the ways in which regional tourism is enhanced and developed through integrated food and wine strategies. This analysis is based on exploratory visits and in-depth interviews conducted with key stakeholders and leaders within the South Burnett and Sunshine Coast regions in Queensland. This study aims to provide comparative analysis of the food and wine regions, identifying the tourism experiences offered and the various characteristics of the regions in terms of their development and leadership.

The wine industry and wine tourism are emerging industries in Queensland. The two regions studied provide a contrasting view of different positioning and stages of development. The Sunshine Coast is a well-established tourist destination, with Noosa being widely recognised as a lifestyle destination with more restaurants per head of population than anywhere else in Australia. There are 711 restaurants and cafés in the Noosa Shire and 194 accommodation operators to cater for visitor numbers of 1.7 million in 2002.

The broader Sunshine Coast region has recently emerged as a food and wine tourism destination (moving beyond just restaurants), with a number of food producers gaining a national profile (e.g. Gympie Cheeses and Bendele Organic Poultry) for the quality of their produce. Many of the emerging food producers and operators are offering a tourist experience with farm gate outlets, farm tours and demonstrations, as well as some very successful cooking schools. For instance, the Spirit House at Yandina, which started as a restaurant in 1995, and two years later opened a cooking school that is now booked out four to six months in advance. There is a growing concern for building a sustainable tourism industry and organisations such as Slow Food Noosa encourage organic producers through education, farmers markets and seasonal festivals. Wine tourism is developing in the region and there are 12 vineyards on the Sunshine Coast with a wide geographic dispersion from Gympie in the north to Maleny in the south. Many of the vineyard operators are newcomers to the wine industry; all are small operators relying on cellar door sales for distribution and many are faced with the challenge of producing enough wine to maintain an income.

The South Burnett region, in contrast, is Queensland’s largest wine producing region, with a well-established agricultural base and an emerging tourism industry based on its historical perspective and natural attractions. This region encompasses five shires and is again spread over a wide geographical area. The South Burnett has developed a number of niche food industries, including cheese and dairy products, olives and aquaculture. While food and wine tourism is being developed and encouraged, many of the region’s producers come from an agricultural background and South Burnett Tourism is introducing a process of education to assist operators in meeting consumer demands. The South Burnett has 15 vineyards including boutique and large commercial producers. This region is still somewhat challenged in some of the core product elements such as accommodation, dining and provision of information via road signage.

Based upon interviews and other case material, the two regions face a number of barriers to developing successful wine and food tourism industries. One key barrier is the perception that Queensland is not a region that can produce quality wines. The geographical dispersion of the wineries is also noteworthy, with distances between outlets being quite large in some cases. There is a need to promote the food and wine attractions within a small geographical area, clustered with related attractions such as galleries, historic buildings, markets and natural attractions. Both regions are spread across several shires, making collaboration and coordination a challenge and a necessity to successful planning and development. This highlights the need to overcome competitive tendencies and encourage collaboration among industry members.

In each case study the development of the region’s produce is paramount and a common theme in this regard was the need for education programs to assist local producers to not only develop their product to high quality standards but to work as professional tourism operators. A key theme emerging from these studies is the importance of people, whether they are owner-operators, association leaders or customer service personnel. It also became evident that perseverance was a key attribute required in the early stages of food and wine tourism development.

Introduction

There are a number of food and wine tourism regions in Queensland, including the Granite Belt, South Burnett, Darling Downs, Gold Coast Hinterlands and Sunshine Coast Hinterlands (see Map 1). Sixty million dollars has been directly invested in Queensland’s wine industry over the past five years and the number of cellar door

\(^1\) Queensland case study led by Beverley Sparks
operators has increased from 30 to 90. The Granite Belt has the largest area under vine, with 640 hectares, the South Burnett is the second largest with 400 hectares, the Gold Coast has 50 hectares and the Sunshine Coast has 20 hectares. In total, Queensland has 1320 hectares of wine grape plantings (Queensland Department of State Development 2004). However, this report sought to study two regions, the Sunshine Coast and the South Burnett.

**Sunshine Coast: Noosa**

Noosa has long had a reputation for its beaches and restaurants; the core of its attraction is the appealing lifestyle it offers, referred to as the ‘latte lifestyle’ in the Noosa Tourism Monitor (Tourism Noosa 2003b)). Restaurants have lined Hastings Street since the early 1970s and, regardless of the quality of food, it was the circumstances surrounding the dining experience that resulted in the reputation that Noosa has upheld as a restaurant capital. Today, however, Noosa is maintaining a reputation for the fine quality of regional food being produced in its restaurants. It is the quality of the produce now being grown in the region that has developed pride in the food being presented in Noosa restaurants and the produce being sold at farmers markets and various farm gate outlets in the shire (Palmer 2003, pers. comm.).

![Map 1: Queensland Wine Regions](image-url)

1. Brisbane City (not a wine region)
2. Central Queensland and North Burnett
3. D’Aguilar Ranges and Somerset Valleys
4. Darling Downs, Inglewood and Maranoa
5. Gold Coast Hinterland
6. Granite Belt
7. South Burnett
8. Sunshine Coast Hinterland
9. Tropical North Queensland

Source: wine-region-tours.com (year unknown)
Characteristics of the Noosa Region

Noosa Shire has an estimated residential population of 44,000 people; however this number increases substantially in the tourist season. In 2002 there were 1.7 million visitors to Noosa spending a total of $617 million in the Noosa Shire. The Noosa Shire encompasses Noosa Heads and the surrounding towns, including Kin Kin, Cooran, Pomona, Cooroy, Boreen Point, Tewantin and Peregian Beach, as shown in Map 2. Some have suggested that Noosa has more restaurants per head of population than anywhere else in Australia (Brierty 2003, pers. comm.). To accommodate the large numbers of tourists, Noosa Shire has 194 accommodation operators providing 6403 accommodation options and 711 food outlets.

Map 2: Noosa Shire

Accommodation in the Noosa Shire

The Noosa Shire has a total of 194 accommodation operators. Of these there are 37 rooms available in bed and breakfasts, cottages, lodges and guest houses; 698 beds in backpacker accommodation; 968 camping and caravan sites; and 2395 flats, 477 serviced apartments and 657 units, apartments or flats for holiday letting, as outlined in Table 1. In total these operators provide 6403 accommodation options (Tourism Noosa 2003a). The average rate for Noosa hotels, motels, serviced apartments and holiday units for 2002 reached a peak in December, at $215.35 per room (Tourism Queensland 2002).
Table 1: Accommodation in the Noosa Shire

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Source: Tourism Noosa 2003a

Wineries on the Sunshine Coast

While food is the dominant tourism offering in the Noosa Shire, there are fourteen wineries operating in the Sunshine Coast and hinterland and all offer cellar door facilities. At the end of 2002, the Sunshine Coast and Hinterland accounted for 20 hectares of wine grape plantings in Queensland (Queensland Department of State Development 2004) (see Map 3). The Sunshine Coast Wineries Association, which currently has 12 members, coordinates the marketing of the Sunshine Coast wineries. The wineries of the Sunshine Coast operate first and foremost as tourism enterprises. Cellar door opening hours are varied with most opening seven days a week and three that open only on weekends due to their location being away from the tourism cluster. All wineries are small operators; therefore opening seven days can result in wine stock being depleted before the next harvest. Many of the cellar doors offer light lunches and sell products other than wine, such as Sunshine Coast Wineries Association branded wine coolers and waiters’ friends, aprons, caps and t-shirts with the winery logo, art, and local products such as Dilly Bag jams and preserves.

Many of the wineries on the Sunshine Coast are newcomers to the wine industry, often owned by people that have moved to the Sunshine Coast for a lifestyle change and decided to plant some vines. Cellar doors have followed as a means of covering costs. Table 2 lists the wineries on the Sunshine Coast.
Map 3: Sunshine Coast Wineries

### Table 2: Wineries in the Sunshine Coast Region

<table>
<thead>
<tr>
<th>Name</th>
<th>Established</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delaney’s Creek Winery and Vineyard</td>
<td>1997</td>
<td>Caboolture Shire</td>
</tr>
<tr>
<td>Maleny Mountain Wines</td>
<td>2000</td>
<td>Maleny</td>
</tr>
<tr>
<td>Settlers Rise Winery</td>
<td>1999</td>
<td>Montville</td>
</tr>
<tr>
<td>Flaxton Gardens Wine Cellar and Vineyard</td>
<td>2000</td>
<td>Flaxton</td>
</tr>
<tr>
<td>7 Acres</td>
<td>1985</td>
<td>Forest Glen</td>
</tr>
<tr>
<td>Eumundi Winery and Vineyard</td>
<td>1996</td>
<td>Eumundi</td>
</tr>
<tr>
<td>Maroochy Springs Winery</td>
<td>2003</td>
<td>Eerwah Vale</td>
</tr>
<tr>
<td>Kenilworth Bluff Wines</td>
<td>1993</td>
<td>Kenilworth</td>
</tr>
<tr>
<td>Dingo Creek Vineyard</td>
<td>1997</td>
<td>Traveston</td>
</tr>
<tr>
<td>Glastonbury Estate</td>
<td>2000</td>
<td>Gympie</td>
</tr>
<tr>
<td>Glengariff Historic Estate Vineyards</td>
<td>1996</td>
<td>Dayboro</td>
</tr>
<tr>
<td>Noosa Valley Winery</td>
<td>2000</td>
<td>Noosa Shire</td>
</tr>
</tbody>
</table>

Source: Queensland Department of State Development 2004; Sunshine Coast Wine 2003

### Special Food Attractions in the Noosa Shire

The Noosa Shire has a subtropical climate and is ideal for growing warm climate produce, and local producers are able to supply the region’s restaurants as well as export products interstate. Some have incorporated tourism into their business, in some cases to increase the sustainability of their business. There are also a growing number of organic and chemical-free producers in this region.

#### Gympie Farm – Cheese and Butter

This farm is owned by Camille Mortaud and produces fresh and matured goat’s cheese, a soft semi-matured cow’s milk cheese and a European-style cultured butter. These products are exported nationally to gourmet delis and restaurants as well as being sold at the local Eumundi Market and at the Jan Power’s Farmers Market at New Farm in Brisbane.

#### Coolabine Farmstead – Goat’s Cheese

Owned by specialist farmers Dee Dunham and Max Warland, Coolabine Farmstead runs about 80 hand-fed Nubian goats and produces about 40 kilograms of soft unripe cheese, a fetta, and a white mould-ripened cheese. The farm hosts cheese making workshops most weekends, on demand at a cost of $88 per person for the day. This includes a home-baked morning tea, exploration of the farm, two styles of cheese making, two course lunch, a cheese and wine tasting and a bag of goodies to take home. The farm welcomes tourists interested in viewing and purchasing produce.

#### Garnisha

Garnisha is a spice farm and cooking school on five acres at Boreen Point in the Noosa Shire. The spice bushes and fruit trees are used in products such as curry pastes, pickles and chutneys made by operator Tim Warren. These products are sold to visitors to the property as well as in retail outlets. Cooking demonstrations are held using products from the farm. Part of the session is a tour of the herb garden and nursery and students eat what they cook. The experience costs $25. The farm is also open to visitors for a chat and tour on Sundays.

#### Ginger Factory

Located in Yandina, this is a tourist attraction that allows tourists to explore the ginger processing plant as well as tasting and purchasing ginger products.

#### Bendele – Organic Ducks

Located in Kilkivan on the outskirts of the Sunshine Coast hinterland, Bendele is a chemical-free farm and they plan to have an organic abattoir, butcher shop and kitchen.
Mur Valley – Chemical-free Ducks and Chickens

Slow Food Noosa
This organisation was established in 2003 in connection to the International Slow Food movement to facilitate the development of a sustainable food industry in the Noosa region. Slow Food Noosa’s aims include to connect local organic and artisan producers, and to encourage agriculture and cuisine tourism that respects and cares for the environment. Slow Food is based in Pomona and includes an organic garden and kitchen, and a bush tucker garden. It hosts an organic farmers market and shared picnic on the 3rd Sunday of each month. The centre is open to everyone and aims to promote its activities to visitors to Noosa.

The Dilly Bag – Bush Tucker
Indigenous chef Dale Scott has established a business that specialises in the manufacture of bush tucker products, catering for corporate functions and running workshops on bush tucker.

The Spirit House – Restaurant, Cooking School, Garden and Produce Shop
The Spirit House is set in a tropical garden and includes a restaurant, hydroponics garden, cooking school and produce shop. The cooking school offers a range of classes that often include lunch and wine. The produce shop sells Spirit House products made in their purpose-built factory, producing a range of curries, curry pastes, and sauces as well as recipe books and cooking equipment.

Other Cooking Schools
Villa Alba, cooking school and boutique accommodation, and The Tamarind Cookery Retreat, luxury accommodation, cooking school and restaurant open to guests only.

Restaurants and Cafés in the Noosa Shire
It is difficult to provide a breakdown of the restaurants in the shire; however Table 3 outlines the number of eateries in each of the towns in the Noosa Shire. The majority of cafés and restaurants are situated in Noosa Heads (206) and nearby Noosaville (193).

Table 3: Restaurants and cafés in the Noosa Shire

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Noosa Heads</td>
<td>206</td>
</tr>
<tr>
<td>Noosaville</td>
<td>193</td>
</tr>
<tr>
<td>Tewantin</td>
<td>95</td>
</tr>
<tr>
<td>Cooroy</td>
<td>70</td>
</tr>
<tr>
<td>Sunshine Beach</td>
<td>30</td>
</tr>
<tr>
<td>Pomona</td>
<td>26</td>
</tr>
<tr>
<td>Peregian Beach</td>
<td>23</td>
</tr>
<tr>
<td>Boreen Point</td>
<td>14</td>
</tr>
<tr>
<td>Sunrise Beach</td>
<td>12</td>
</tr>
<tr>
<td>Kin Kin</td>
<td>12</td>
</tr>
<tr>
<td>Cooran</td>
<td>7</td>
</tr>
<tr>
<td>North Shore</td>
<td>6</td>
</tr>
<tr>
<td>Cootharaba</td>
<td>6</td>
</tr>
<tr>
<td>Other</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>711</strong></td>
</tr>
</tbody>
</table>
Visitor Centres in the Noosa Shire

Tourism Noosa has a central office in Hastings Street Noosa. It operates as a customer service centre, taking bookings for accommodation and providing information. Sixty-five volunteers, seven permanent booking staff and two casual booking staff man the centre. There is another information centre at Tewantin, staffed by 30 volunteers and a proposed centre for Peregian. Tourism Noosa is not funded by council and operates as a non-profit organisation. A commission of 10% is charged for bookings to cover costs. Tourism Noosa is predominantly funded through membership fees and receive some funding from the Noosa Tourism Levy, governed by the Noosa Tourism Community Board. There are 550 members of Tourism Noosa. Membership is made up of tourism and other related operators, with approximately 200 accommodation members, 100 tour operator members, about 50 professional service people, and there are some private members and butchers, bakers, mechanics etc. that feel tourism is important.

Visitor Numbers and Activities in the Noosa Shire

Visitor Profile

The largest proportion of domestic visitors to the Sunshine Coast are aged between 25 and 44 years (41%). Visitors between 45 and 64 years represent 33% of this market, with 16% being 15 to 24 years and 10% being 65 or more (Tourism Queensland 2002). Tourism Noosa identified that interstate visitors to Noosa are predominantly 35 to 50 year-olds with high income (23%). Intrastate visitors were more likely to be in the mid to high income group with an average age of 20 to 25 (20%) or 35 to 45 (17%). Noosa has a high proportion of repeat visitors with 29.6% of visitors having visited the area at least once and 31% having visited at least four times in the last three years. First time visitors to Noosa account for 34.4% of the market (Tourism Noosa 2003b). The largest proportion of visitors to Noosa come from interstate (43.5%) with overseas visitors accounting for 28.5% and intrastate for 28% of the market.

Purpose of Trip

The most common purpose of trip to Noosa in May 2003 was taking a holiday (80.7%), 11.8% were visiting friends and relatives, and only 7.5% were travelling for a conference, special event or on business (Tourism Noosa 2003b).

Visitor Numbers

In the year ended 2002 there were 2.6 million domestic overnight visitors and 204,865 international visitors to the Sunshine Coast. According to room occupancy numbers, the peak months for the Noosa region in 2002 were January and October (Tourism Queensland 2002). In 2002 to 2003 there were 1.7 million visitors to the Noosa region (Tourism Noosa 2003b). Table 4 outlines the number of domestic and international overnight visitors to the Sunshine Coast.

Table 4: Visitors to the Sunshine Coast

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic Visitor numbers</th>
<th>Year</th>
<th>International Visitor numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>2,442,000</td>
<td>1999</td>
<td>202,341</td>
</tr>
<tr>
<td>2000</td>
<td>2,467,000</td>
<td>2000</td>
<td>212,649</td>
</tr>
<tr>
<td>2001</td>
<td>2,242,000</td>
<td>2001</td>
<td>230,204</td>
</tr>
<tr>
<td>2002</td>
<td>2,649,000</td>
<td>2002</td>
<td>204,865</td>
</tr>
</tbody>
</table>

Source: Tourism Queensland 2002
Visitor Activities
As outlined in Table 5, the most popular activities undertaken by visitors to Noosa in 2003 were swimming/visiting the beach (88%), visiting cafés/coffee shops (79.5%) and shopping/Hastings Street (78%).

Table 5: Visitor activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swimming</td>
<td>88.0</td>
</tr>
<tr>
<td>Café/Coffee Shops</td>
<td>79.5</td>
</tr>
<tr>
<td>Shopping</td>
<td>78.0</td>
</tr>
<tr>
<td>Dining in restaurants</td>
<td>73.0</td>
</tr>
<tr>
<td>Visit riverfront</td>
<td>71.0</td>
</tr>
<tr>
<td>Visit National Parks</td>
<td>57.0</td>
</tr>
</tbody>
</table>

Source: Tourism Noosa 2003b

Marketing of Noosa Region
A Tourism Levy was introduced in Noosa in 2001, which is collected by council and governed by the Noosa Tourism Community Board. The Noosa Tourism Community Board is made up of three tourism operators (chosen by Tourism Noosa), three community representatives (chosen by council), one council representative and three in between (see Figure 1). In the first two years of the levy Tourism Noosa were the lead marketing agency, receiving $500,000 for destination marketing and $100,000 for the information centre.

In 2003, funding to Tourism Noosa was reduced with funding instead going toward the development of the Noosa brand, new product development, existing product development, and sustainability. An advertising agency was employed to coordinate the advertising under the new Noosa brand. An accreditation system that requires subscription will be incorporated into the branding process, using twice yearly audits of members and providing an education tool to assist members with the operation of their business. This will cover seven areas
including customer service, training, money, and managing people; covering different business areas that will enable the business to be capable of carrying the Noosa brand. One of the aims of the new branding process was to address Noosa’s inability to meet with customer expectations in the area of customer service.

The marketing arm of Tourism Noosa has been reduced; however they still maintain the Visiting Journalists Program (VJP). This program is a very successful marketing arm that generated $9m of publicity in the 2002-2003 financial year.

Tourism Noosa coordinate the Noosa Regional Tourism Monitor, with components such as the Regional Tourism Activity Monitor, identifying occupancy figures on a monthly basis, and the Noosa Visitors Survey collected three times a year identifying who is coming to Noosa and what they like and dislike about Noosa. The findings have identified high levels of satisfaction with Noosa but dissatisfaction in the area of customer service.

Tourism Noosa consulted KPMG to produce a report on whether Noosa should create new products for the tourism market or promote existing products. The outcome of this report was that existing products should be clustered. There are now five cluster groups: cuisine, art, soft adventure, eco tourism, and cultural heritage. The cuisine cluster is made up of food producers from the region.

The Noosa Community Tourism Board supported the development of the Noosa Food Trail, a guide to the regional produce of the Noosa region produced by Tourism Noosa (Tourism Noosa 2004). This guide outlines the locations, produce and opening hours for a select number of local artisans, farm gates and farm visits, markets, restaurants, wineries and gourmet producers, as well as Noosa events.

**Food and Wine Regional Development Groups in the Noosa Shire**

As outlined above, there are 206 restaurants and cafés in Noosa alone, however food groups are limited. This could be explained by the fact that many of the region’s producers have only been producing consistently for the last five years (Leonie Palmer 2003, pers. comm.). Two groups identified for this study were the Noosa Regional Food Group and Slow Foods Noosa. Sunshine Coast wineries are represented by the Sunshine Coast Wineries Association.

**Noosa Regional Food Group**

Noosa Regional Food Group was established five years ago by a group of Noosa restauranteurs. The aim was to highlight food and wine in the Noosa region. The president of this group is Leonie Palmer and there were approximately 64 members listed in 2002. The aim of the group is to ‘sustain, through industry cooperation, Noosa’s reputation as Australia’s premier culinary area and continue our vital integration with the local community’ (Queensland Wine Tourism Industry Directory 2003).

Since the establishment of Noosa Regional Food Group, however, it has been realised membership needs to include individuals that are not driven only by self interest but those that are able to work as a cohesive group toward the particular aims of the group. For this reason, the Noosa Regional Food Group is in a period of reformation with some clear aims for the future. These aims, driven by Leonie Palmer, include creating a sense of community between the rural and coastal sectors; incorporating a teaching arm that takes groups of chefs, growers and cheese makers, and educates them in other areas of the food industry; and developing and promoting the region’s produce under a regional food brand.

**Noosa Long Weekend Committee**

This committee formed in 2001 to promote the region’s art, film, theatre, environment, food, wine, music and visual arts in a 10 day festival. Food and wine are promoted in a series of lunches and dinners, with two or three restaurants in Hastings Street coming together to showcase their dishes. This is now an annual event and the Noosa Long Weekend Committee aims to get a facility that can be a total performance venue where everything showcased during the event can be integrated in the one centre.

**Noosa Farmers Market**

Currently operating monthly, but planned to be fortnightly, this market is held in Noosa and run by Shane Stanley. The Noosa Farmers Markets are held every second and fourth Sunday and feature over 100 stalls of locally grown produce.

**Slow Food Noosa**

Slow Food Noosa aims include connecting local organic and artisan producers, and encouraging agriculture and cuisine tourism that respects and cares for the environment. Slow Food Noosa is based in Pomona and includes an organic garden and kitchen, and a bush tucker garden. It hosts an organic farmers market and shared picnic on the third Sunday of each month. Slow Food Noosa is a non-profit organisation that receives funding from various sources to develop projects.
Sunshine Coast Wineries Association
Sunshine Coast Wineries Association has 12 members and receives funding from council to assist with marketing local wines. A levy of $1000 per member also contributes to marketing. The objectives of this association include the establishment of a successful wine tourism industry on the Sunshine Coast and raising the profile of the region by successfully marketing and promoting Sunshine Coast wineries as a cohesive group.

Interviews
Interviews were conducted either onsite or by phone with the following individuals: Leonie Palmer, owner of Ricky Ricardos and a member of the Noosa Regional Food Group; Kali Nielsen of Slow Food Noosa; Helen Brierty, owner of the Spirit House Restaurant and Cooking School; Andrew Fairbairn of Tourism Noosa; and Jack Connolly, president of the Sunshine Coast Wineries Association.

Leonie Palmer (Ricky Ricardos and Noosa Regional Food Group)
Leonie Palmer has been in Noosa for over 30 years and is attracted to the region by its unique sense of community. Leonie was instrumental in the establishment of the Noosa Regional Food Group four years ago. Leonie identifies a link between the development of a regional produce base for Noosa and the sense of pride that became apparent in the food being produced in the region’s restaurants. Over the last five to 10 years, the number and standard of regional producers has grown from almost nothing to having a couple of cheese makers who are competing on a national scale, and a number of well-reputed organic poultry farms, along with specialised herb and vegetable growers.

Noosa has always had a reputation as a restaurant town and in the early days this reputation was romanced a little in that regardless of the quality of the food, it was the situation that the consumer was in that carried the reputation of the restaurants. Noosa was unique, with a high concentration of restaurants in one street (Hastings Street), many of which were established by people moving to Noosa from elsewhere who didn’t know what else to do.

Leonie outlines some of the prominent producers in the Noosa region, including Bendele organic poultry, Gympie Cheese Farm and Garnisha. The Noosa Regional Food Group did start a tour of regional producers that were oriented toward tourism, however this could not be maintained during the peak tourist season, although it is planned to reintroduce these tours at some time in the future. Slow Foods Noosa has been established to address issues of sustainability for the region’s producers and will operate as an arm of the Regional Food Group, assisting this group to achieve its future objectives, such as farm tours, encouraging restaurants to showcase what is happening in the region, and developing collaborations between the various groups.

The philosophy of Slow Food and that of Leonie Palmer leans more toward the development of a sustainable industry encouraging an organic lifestyle. So while one of the aims of the two groups is to have a Noosa Regional Food brand, the criteria for members is a bit hard to determine, and perhaps different categories will need to be introduced. Leonie believes that in Australia our regional produce is something we can be proud of, but the recognition of this produce needs to be encouraged among restaurant chefs, recognising that while not all produce can be sourced from the one region, using the best produce from whatever region with pride is important. Pride is the first thing needed if a region is to pull together, as well as a sense of community and open communication. There is a need to foster positive interaction between the restaurants, rather than seeing them as competition.

With the Noosa Regional Food Group becoming the commercial arm of Slow Food, the long term aim is to incorporate a teaching arm where chefs will go out and learn from cheese makers and other producers and assist in spreading the regional word. A scholarship arm is also planned that would enable young chefs or producers to travel and bring knowledge and experience back to the region.

Kali Nielsen (Slow Food)
In the Rural Futures Centre, located at Pomona, Slow Food is setting up a site where sustainability can be demonstrated through cooking demonstrations encouraging indigenous foods, and workshops such as planting an organic garden and building a clay oven. Much of Kali’s work is voluntary, however some funding has been received through various grants, such as the Green Tin Volunteers grant, as well as money from the Noosa Regional Food Group.

An organic market is held on the first Sunday of the month as well as four seasonal festivals incorporating the shared picnic. At this stage 99% of people coming to these events are local. The centre is set on five acres and can have up to 300 stalls when it reaches capacity. The aim is for these markets to develop into purposeful markets where people actually come to trade and not just to experience a novelty.
Helen Brierty (The Spirit House Restaurant and Cooking School)
The development of the Spirit House began in 1991; developing the grounds, starting the hydroponics farm and
opening the restaurant in 1995. The cooking school was opened two years later. There are 16 people per class,
conducted around a large table and followed by lunch, eating the food produced. Classes cost $95 and some
clients spend up to $1000 in the cooking school shop following a class. Many restaurant customers find out
about the restaurant following participation in a cooking class.

The largest market for the cooking school comes from Melbourne and Sydney with both male and female
participation; other strong markets include Brisbane, Adelaide and international visitors. Product development
has included the introduction of packaged meals that are available in specialty retail outlets throughout Australia.
The restaurant and cooking school are promoted in the packaging of these items. This form of promotion has
been very successful. The chefs in the restaurant are well-trained and conditions are such that they tend to be
long term employees. Chefs are sent to Thailand once a year to increase their knowledge and experience of Thai
cuisine. Restaurant customers are often tourists staying in the Noosa region. Helen works closely with Maroochy
and Noosa Tourism and collaborates with the local Hyatt and Sheraton hotels regarding conference bookings. A
regular newsletter is sent out to a large database

Jack Connolly (President, Sunshine Coast Wine Industry Association)
There are 12 winery operators in the Sunshine Coast Wine Industry Association, most of whom have come from
the city for a lifestyle change and decided to start a winery. As such, they realised that none of the members had
the time or expertise to develop a business plan or, more importantly, a strategic marketing plan. As a result,
Jack went to council with a proposal and received funding of $25,500. In addition, a levy was placed on
members for $1000 each allowing the Sunshine Coast Wine Industry Association to employ a professional
marketing person for 12 months. The Sunshine Coast Wine Industry Association are a very cohesive and
coordinated group that aim to produce a successful wine tourism industry within the region, to raise the profile of
the region through a cohesive marketing plan, and to increase the profile of Queensland wines

Key Themes Emerging
The Sunshine Coast, although well-developed as a tourism destination, has a newly emerging wine tourism
industry. The wineries of the Sunshine Coast operate first and foremost as tourism enterprises. All the wineries
on the Sunshine Coast are small boutique operators relying primarily on cellar door sales to distribute their wine.
However, with small production yields, continuous year-round supply can be problematic for some wineries due
to low production. Many of the wineries on the Sunshine Coast are newcomers to the wine industry, often owned
by people that have moved to the Sunshine Coast for a lifestyle change. As a result there are a number of themes
that have emerged from this case study that are important to the future development of wine and food tourism on
the Sunshine Coast.

Collaboration
One of the most important themes to emerge from this case study is that collaboration among stakeholders is
both a challenge and a necessity to successful planning and development. This highlights the need to overcome
competitive tendencies and encourage collaboration among industry members. Working together seemed to
emerge as a key factor in the regional development. As one interviewee on the Sunshine Coast stated when
discussing what makes for strong regional development, ‘[i]t’s the sense of community and without that you can
go nowhere’.

Leadership
We identified individuals with a passion for a particular vision for the Sunshine Coast region that are the driving
force in the development of the region as a food and wine tourism destination. These individuals are encouraging
collaboration and commitment from industry members, however this is a difficult task when operators are
motivated by self interest, as one stakeholder identified:

... again it comes back to that everyone gets busy and it all starts to fall down if someone isn’t keeping
it alive and going. But those things will come back; I am quite convinced we will get those up and
running.

In many of the interviews we conducted we found evidence of an entrepreneurial and pioneering attitude. For
example, Kali Neilsen with her vision for the development of Slow Food Noosa, although often employed on a
voluntary basis, outlined her strategies for the development of the region’s organic food producers into a
cohesive group supplying the region’s restaurants, and outlining plans to bring together the organic producers
with restauranteurs to help grow the organic produce of the region. In this interview the stakeholder’s passion for
this project was evident.
**Barriers**

A number of barriers have been identified in this study, for example the lack of formal training resulting from many of the winery operators taking to wine tourism on the Sunshine Coast as a lifestyle choice – taking on wine tourism as a ‘hobby’. The size of the wineries in the Sunshine Coast is an impediment to development as the president of the Sunshine Coast Wine Industry stated, ‘...we don’t grow enough grapes. One of our members has been out of all wine for about a month’.

Another problem related to size is the effect that the WET tax has on these small operators, as economies of scale are not there to help them absorb this tax, instead they have to have a high price on their wine:

... our wine is expensive, if you go to the Hunter Valley you can buy a $7-$8 bottle of wine, well you would have to double that up here.

The wineries in the Sunshine Coast region are widely dispersed with quite a distance between some of them, making collaboration and coordination a challenge and a necessity.

**Professionalism**

The collective, network nature of the development of this sort of tourism in regions such as the Sunshine Coast presents challenges. For instance, the president of the Sunshine Coast Wine Industry Association stated:

... the way that most collectives of people operate is ‘oh, did you hear about this ... next week let’s see if we can do something about it’. Always too late, always chasing your tail, people are panicking and they spend a lot of the time running around in circles and that’s not professional.

Planning seems to present a challenge for many newly organised network groups. The Sunshine Coast operators seem to be immigrants from the southern states of Australia who might be classified as ‘lifestyle’ entrepreneurs; this factor could add to the challenge.

**Marketing**

The Sunshine Coast has a solid tourism base and new and existing operators have set up their businesses to cater for tourism. The wineries on the Sunshine Coast operate as tourism entities, relying on cellar door sales for revenue, and as such are actively promoting themselves to tourists. As one informant responded:

I’ve learnt marketing from a professional and what we have got to do is instil that attitude in our people. If a person only has one bottle of wine a week they will only buy one bottle of wine when they are there but you have got to try and increase their sale and we are doing proper promotional efforts now.

**Training**

In the Sunshine Coast region, the majority of winery operators have moved here for a lifestyle change and do not have previous experience within the tourism industry. The Sunshine Coast Winery Association indicated an awareness of the need for training to communicate professionalism to visitors to the Sunshine Coast:

We have monthly meetings and we are trying to be more and more professional as a group, and that will help us longer term, not only with our members, but when our visitors come they will see that we will have, our soon to be on the wall of each place, a code of practice and that code of practice does the normal responsible things that an operator should do, such as responsible service of alcohol etc. and also to state our opening hours and to maintain that. So if you open from 10 till five then you better be open from 10 to five because I will be doing audits. And those are responsibilities of the operator, so we want to show the public, the tourism people that we are serious and professional although we are small.
South Burnett

South Burnett is situated two-and-a-half hours north-west of Brisbane. South Burnett is traditionally known for its peanut and navy bean production, however, today, resulting from the need for diversification within the agriculture industry, the area now boasts an emerging wine industry, with twelve wineries currently operating cellar door outlets in the region. As well as viticulture, the region has olive groves, aquaculture farms and prime cattle properties. Tourists are attracted to the area not only by its food and wine but by the many historic houses and other buildings associated with a bygone era (Office of Economic and Statistical Research year unknown). At this stage of development, it appears that the South Burnett region is underdeveloped in terms of tourism infrastructure, displaying a need for more restaurants and accommodation, as well as signage.

Characteristics of the South Burnett Region

The South Burnett region comprises the Nanango, Kingaroy, Wondai, Murgon, and Kilkivan shires, and the town of Yarraman. The residential population of the South Burnett region was 35,836 in 2001 (ABS 2001). Table 6 shows a breakdown of resident population in each of the shires. Kingaroy has the largest population, with 11,415 residents. The South Burnett region has developed many niche food industries, including cheese and dairy products, olives, aquaculture, goat meat, organic beef, organic dried fruit and organic poultry.

<table>
<thead>
<tr>
<th>Shire</th>
<th>Number of Residents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kilkivan</td>
<td>3,134</td>
</tr>
<tr>
<td>Kingaroy</td>
<td>11,415</td>
</tr>
<tr>
<td>Murgon</td>
<td>4,572</td>
</tr>
<tr>
<td>Nanango</td>
<td>8,230</td>
</tr>
<tr>
<td>Wondia</td>
<td>4,041</td>
</tr>
<tr>
<td>Rosalie</td>
<td>4,448</td>
</tr>
<tr>
<td>South Burnett Region</td>
<td>35,836</td>
</tr>
</tbody>
</table>

Source: South Burnett Local Government Association 2003

Accommodation in the South Burnett Region

The South Burnett region has a total of 76 accommodation operators. Table 7 outlines the accommodation outlets in the region according to accommodation type.

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfasts, Cottages</td>
<td>17</td>
</tr>
<tr>
<td>Backpackers</td>
<td>n/a</td>
</tr>
<tr>
<td>Farm Stay</td>
<td>7</td>
</tr>
<tr>
<td>Caravan Parks</td>
<td>13</td>
</tr>
<tr>
<td>Hotels/Motels</td>
<td>39</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>76</strong></td>
</tr>
</tbody>
</table>

Source: South Burnett Tourism 2004
Wineries in the South Burnett Region

The South Burnett region is now the largest wine growing region measured by grape crush tonnage in Queensland, with the Queensland Department of State Development’s report estimating that the region’s total grape crush in 2003 was 1,362 tonnes – almost double that of the Granite Belt (Queensland Department of State Development 2004). There are 15 vineyards in the South Burnett region, many with cellar door facilities. As a wine producing region, the South Burnett is very young, with the first winery being established in 1995. Table 8 lists the wineries in the region; some have not yet released their first vintage. Map 4 shows the locations of wineries in the South Burnett Region; however this map is not to scale.

Table 8: Wineries in the South Burnett Region

<table>
<thead>
<tr>
<th>Name</th>
<th>Established</th>
<th>Location</th>
<th>Size</th>
<th>Style</th>
<th>Cellar Door</th>
</tr>
</thead>
<tbody>
<tr>
<td>Barambah Ridge Winery</td>
<td>1995</td>
<td>Redgate</td>
<td>500 tonnes</td>
<td>Large commercial</td>
<td>Yes</td>
</tr>
<tr>
<td>Bridgeman Downs Cellars</td>
<td>1996</td>
<td>Moffatdale</td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Captains Paddock Vineyard</td>
<td>1995</td>
<td>Kingaroy</td>
<td>4 hectares</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Clovely Estate</td>
<td>1997</td>
<td>Murgon</td>
<td>1298 tonnes</td>
<td>Large commercial</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>220 hectares</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooper Country</td>
<td>1997</td>
<td>Nanango</td>
<td>1 hectare</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Crane Winery</td>
<td>1993</td>
<td>Boogie</td>
<td>4 hectares</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Kingaroy Ridge Winery</td>
<td>2003</td>
<td>Boogie</td>
<td>Limited quantities</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Stuart Range Estates</td>
<td>1997</td>
<td>Kingaroy</td>
<td>400 tonnes</td>
<td>Large complex</td>
<td>Yes</td>
</tr>
<tr>
<td>Bunya Mountains Wines</td>
<td>2003</td>
<td>Bunya Mountains</td>
<td>Satellite cellar door</td>
<td>Stuart Range Estate</td>
<td>Yes</td>
</tr>
<tr>
<td>Ziebarth Fine Wines</td>
<td>1998</td>
<td>Goodger</td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Dusty Hill Vineyard</td>
<td>1996</td>
<td>Moffatdale</td>
<td>7 hectares</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Kingsley Grove</td>
<td>1998 – first release 2003</td>
<td>Kingaroy</td>
<td>8.7 hectares</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Moffatdale Ridge</td>
<td>1995</td>
<td>Moffatdale</td>
<td>105 hectares</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Roderick’s Fine Wine</td>
<td></td>
<td>Redgate</td>
<td>18 hectares</td>
<td>Boutique</td>
<td>Yes</td>
</tr>
<tr>
<td>Tipperary Estate Vineyard</td>
<td></td>
<td>Moffatdale</td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

Source: Queensland Department of State Development 2004; South Burnett Tourism 2004
Special Food Attractions in the South Burnett Region

The South Burnett region promotes a wine and food trail, as shown in Map 4. At this stage of its development, it is attracting visitors from the Sunshine Coast more so than Brisbane. The food aspect of this trail features the following.

The Left Bank
Located in Kilkivan the Left Bank is a café, gallery and bed and breakfast in what was once an ANZ bank. The café features the region’s produce on the menu and available for sale as a range of condiments, pickles or similar products.
**Bella Villa Farm**
An aquaculture farm cultivating Red Claw (freshwater) crayfish that welcomes visitors to tour the farm, and taste the crayfish, olive oil and olives grown on the property.

**Essdale Park Lavender Farm**
Offering farm tours, morning and afternoon teas and an outlet selling lavender products from the farm.

**Pottique**
A lavender farm and cellar door offering tours and Devonshire teas.

**Stuart Range Estate**
The Stuart Range Estate complex comprises the winery built in the Kingaroy 1907 Butter Factory, Proteco gourmet cold pressed oils and nut products, and Kingaroy Cheese, all available for tasting at the cellar door. Tours of the plant are available, allowing visitors to view the cheese making process and see the oil and nut production area and the winery.

**Spring Gully Olives**
This farm has five hectares of olives and invites visitors to the farm to view the olive press and oil production process as well as learn about the different varieties of olives grown on the property and sample and purchase the products.

**The Peanut Van**
The Peanut Van was established in 1969 and is a well-known tourist attraction in Kingaroy. Every year about 40 tonnes of peanuts are sold from the van.

**Restaurants and Cafés in the South Burnett Region**
Table 9 outlines the number of restaurants and cafés in the South Burnett region. Kingaroy, being the most populated of the shires, has the greatest number of restaurants and cafés. The small number of restaurants in the area, coupled with the fact that many of them do not operate seven days a week and some only open for lunch, is possibly a disincentive to people interested in taking food and wine oriented holidays.

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kilkivan</td>
<td>1</td>
</tr>
<tr>
<td>Murgon</td>
<td>12</td>
</tr>
<tr>
<td>Wondai</td>
<td>7</td>
</tr>
<tr>
<td>Kingaroy</td>
<td>18</td>
</tr>
<tr>
<td>Nanango</td>
<td>11</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>49</strong></td>
</tr>
</tbody>
</table>

**Visitor Centres in South Burnett**
South Burnett is a sub region of the Fraser Coast South Burnett (FCSB) Regional Tourism Organisation. FCSB Tourism Association has 453 members and of these 93 are members of the South Burnett Tourism Association. This equates to approximately one third of all businesses in the South Burnett that are directly or indirectly oriented towards tourism. The fee is $250 for tourism entities and $175 for individuals. South Burnett Tourism gets a $250 donation from each of the shire councils.

Within the South Burnett region there are four visitor information centres (Nanango, Kingaroy, Murgon and Wondai) as well as four unstaffed information centres (Yarraman, Blackbutt, Goomeri and Kilkivan). These centres are operated by six paid staff and approximately 70 volunteers.
Visitor Numbers to South Burnett

Estimates of visitor numbers to South Burnett provided by South Burnett Tourism counts of visitors to the visitor information centres indicate that in the 2002-2003 financial year 47,917 people came through. This is a 50% increase over the same period of the previous year. Of these 76% were from intrastate, 10% from New South Wales, 5% from Victoria, 4% from other states and 4.8% from overseas.

Of the Queensland visitors, the largest proportion originated from the South Burnett local region (37.1%), 29.8% were from Brisbane, 8.5% were from the Sunshine Coast and 6.3% were from the Fraser Coast.

South Burnett tourism has identified an increasing number of visitors in the 40 years+ market travelling through the region in the winter months; long haul travellers from Victoria and New South Wales travelling with caravans.

The three major attractions motivating visitors to the region are identified as the Bunya Mountains, the two great lakes and the wineland areas of the region around Kingaroy and Moffatdale (South Burnett Local Government Association 2003).

Marketing of the South Burnett Region

The FCSB regional tourism organisation is responsible for the external marketing of the region. The charter of South Burnett Tourism is to assist in the development of tourism in the region. As a member of the FCSB regional tourism organisation, one of the current marketing campaigns is the South East Queensland Country marketing strategy. This strategy includes a south-east Queensland country touring guide which takes in the South Burnett region and includes the South Burnett wineries. South Burnett also participates in the Visiting Journalists Program and all the activities incorporated in this campaign.

As part of South Burnett’s tourism development strategy, new customer markets are being sought. This strategy aims to utilise existing tourism product, highlighting the nine golf courses in the region in a brochure and packaging golf with the food, wine and boutique accommodation available in the region. Another strategy incorporates the South Burnett wine trail with antiques or heritage features of the region, which potentially provides a broader base for tourism development.

Another initiative of the tourism development strategy being promoted by the South Burnett Local Government Association is developing a single brand for the South Burnett region. This strategy identifies the need for all member councils to include the words ‘Part of the South Burnett’ and/or the regional logo on all external communications, include these words on all town entry and exit signs, rename visitor information centres to ‘South Burnett Visitor Information Centre – (town name)’, and confirm that each council recognises the potential benefit that tourism holds for the entire region and ensure that a commitment is made to sustain and enhance tourism development and unify any external marketing activities (South Burnett Local Government Association 2003).

The South Burnett Wine Industry Association is in the process of developing a new regional logo, which can be used by tourism and wine industry operators as well as regional councils. The new logo is part of the region’s new brand development and aims to provide the region with a new stylised marketing logo.

Food and Wine Regional Development Groups in the South Burnett

The South Burnett Regional Cuisine Group

The South Burnett Regional Cuisine Group was formed in response to an initiative of the South Burnett Tourism association in partnership with the Department of Primary Industry and the local Tertiary and Further Education (TAFE) college. The charter of the group was to produce a regional cuisine guide. This guide includes recipes utilising local produce and is now in a publication that is sold as a souvenir recipe book through the region’s information centres. The production of the book was funded through grants and the sales revenue will go toward the funding of another project for the group, which is currently inactive.

The South Burnett Wine Industry Association

The South Burnett Wine Industry Association aims to promote the region as a quality gourmet food and wine region. They are active in promoting the region’s wine growing status to locals as well as visitors to the region. A recently formed marketing subcommittee is currently formulating a marketing plan for the region’s future growth. One strategy being considered is an annual wine festival at Noosa to promote the region’s new vintages. A technical subcommittee has also formed, their aim being to educate and provide a mentor system for the smaller operators to assist in the production of non-technically incorrect, quality wines for the region. The association is also active in the development of a South Burnett regional logo to be used by wine industry and tourism operators.
Interviews

Chris Ganzer (Stuart Range Estate)

Chris Ganzer manages the Stuart Range Estate which incorporates a winery, cheese making facility and nut and oil production plant. Chris’s passion is cheese making and, following a community meeting in 2000, a group of four who were interested in establishing a cheese factory was formed and a cheese factory was set up in 2002 targeting specialty cheese products. Chris states that the business development of Stuart Range is of most importance at this stage rather than ‘bringing everyone along for the journey’, as there is some conflict between what works commercially for the business and what works in terms of bringing the region together. However, he adds that by carrying out activities that promote and benefit Stuart Range Estate commercially, the region also receives recognition. The wine produced here is promoted and distributed at approximately eight festivals annually, as well as through a wine club, to which the Sunshine Coast region is a strong market, and through distributors in Sydney and the Hunter Valley. Cheeses are distributed through specialist retail outlets in Brisbane; however, distribution of the oil products is limited to cellar door because of the difficulty of breaking into the market due to the number of other gourmet oil products on the market that are demanding a high price.

The number of tourists visiting this site has grown from zero prior to the establishment of the winery in 1998 to approximately 18,000 to 20,000 in 2003. In the last three years Chris estimates tourist visits to the site have grown 15% each year in terms of cash takings at the cellar door, which he states ‘is always important, it’s nice to have more numbers but if you don’t see more expenditure with that then it makes it hard to justify’.

Debbie Postle (South Burnett Tourism)

South Burnett is a sub region of the FCSB regional tourism organisation. Tourism operators pay the FCSB regional tourism organisation for membership. The fee is $250 if you are a tourism entity, individuals are slightly less, about $175 for membership. FCSB then pays a proportion of that back to the South Burnett Tourism Association. South Burnett Tourism gets a $250 donation from each of the councils. Their donation is just token, however, as members of FCSB regional tourism organisation, the councils each pay FCSB regional tourism organisation about $7,000 per year per council. This is a major contribution to the external marketing of the FCSB regional tourism organisation. There are six councils in the region:

- Kingaroy shire;
- Nanango shire;
- Wondai shire;
- Murgon shire;
- Kilkivan shire; and
- Rosalie.

The Tourism Project Manager South Burnett Tourism has the charter to develop the tourism product of the region, focusing on uniting the region, creating new products and clustering existing products, as well as developing new customer markets.

Food and wine are very important motivators and factors in attracting people to the South Burnett region. There are currently 12 cellar doors open and one distillery, which is one of four in Queensland. There are another five cellar doors planned for the region. Debbie states that the advantage of the South Burnett area is the extra product, not just wine, and that is a nice alternative when research says that you only really enjoy four cellar door visits in a day.

One of the barriers to the development of wine tourism in the South Burnett is a lack of understanding among wine producers that they are operating within the tourism industry and are therefore not catering to the needs of visitors to the region. The nine antique store operators have a similar attitude in that they do not really enjoy four cellar door visits in a day.

The South Burnett Wine Industry Association is a major promoter of the region’s wine and food. They are currently introducing a new South Burnett wine label and South Burnett Tourism aim to follow this up with a new regional logo that is representative of the five shires. The wine industry association are also looking at putting a South Burnett quality tick of approval on their wines; however, this will not cover the food produce at this stage. Debbie stated that the food producers are very reliant on the wine industry and take their lead from them; however, the two groups haven’t actually united.

Bruce Hurley (The Left Bank)

Bruce Hurley operates The Left Bank Café, Gallery and Bed and Breakfast, Kilkivan. The café sells a large range of local produce and serves a regional food platter that includes the Red Claw crayfish produced at Bella Villa Farm. Bruce is passionate about the produce of the South Burnett region and is active in promoting the region’s produce, but indicated that the region, being spread across five shires, has some barriers as a consequence of the different focuses of each of the shire councils. Collaborative activities among the region’s producers have been limited to local festivals (such as the Shakin’ Grape Festival, Murgon, and the Tarong Mine
Wine & Food In The Park Festival, Kingaroy) and the regional cuisine group that formed as a result of funding granted by the Queensland Department of Primary Industry and the South Burnett Tourism Association to produce a souvenir cookbook that aimed to be a regional cuisine guide with recipes utilising local produce. This group is not currently active following the completion of this project.

**Key Themes Emerging**

In South Burnett the development of the region’s produce is paramount and a number of themes have emerged from this case study, such as the need for education programs, the need to establish collaborative networks among stakeholders, the importance of passionate, committed individuals to drive tourism development, and an understanding that without professionalism among winery operators, much of the region’s tourism development strategies will not be as fruitful in terms of the satisfaction of tourists visiting the region’s wine and food attractions.

**Collaboration**

People play a major role in contributing to the tourist experience, therefore achieving collaboration among tourism operators is vital. In South Burnett the staff that welcome guests appear genuinely interested in providing insight to their tourism product. However, as one of the stakeholders suggested, a more concerted, collaborative approach needs to be taken to encourage tourists to the area:

> We were finding that the hosted accommodation operators were not referring customers on to other accommodation if they were unable to accommodate them, so we were losing these people. The accommodation providers didn’t know what other accommodation providers were offering, and in the hosted accommodation there are a number of different experiences that you can get at different places. Anything from the traditional farm stays to a cottage in a vineyard, to the traditional B&B, to The Left Bank which has great regional cuisine and a great community feeling as Kilkivan has. They all have a little different experience; however no one would refer and people were getting called up and saying ‘no we don’t have accommodation tonight’ and that’s it.

**Leadership**

As tourism is in its infancy in the South Burnett region, not all operators consider they are part of the tourism industry. Many have an agriculture background or operate at a retail level, some without the necessary training for the tourism industry. Others recognise that tourism needs to be developed in the region; however, the bottom line is the more important issue. As a result, interviews and observations indicate that there may be a lack of leadership among the food and wine operators in this region, preventing them working as a collaborative group:

> I guess it’s a difficult one, it’s probably the one I find the hardest and from time to time I get criticism for not bringing everyone along for the journey and it’s a pretty hard line to ride in terms of what do you do that works commercially for you and what works in terms of bringing the whole region together and I’d much rather be out there doing the commercial stuff that benefits us commercially and then you promote at the same time and if that means that you don’t turn up to quite as many of the committee meetings, well I’m happy to take the heat, that’s fine.

**Barriers**

The barriers identified through both the interviews and observations include the geographical dispersion of the wineries, with distances between outlets being quite large in some cases. An identified lack of signage and well informed promotional material add to the problems associated with this.

Many of the operators, though exhibiting enthusiasm, lack formal training, as identified by one interviewee: ‘I guess that’s an impediment… the lack of formal training of our members’. A similar problem identified in the region is the need for education for winery operators: ‘... this is an education process that we are trying to get over, for them to realise that they are in the tourism industry and therefore they should be open’. Similarly, several interviewees commented on the need to have consistent opening hours and actually be open when advertised.

One of the problems was associated with emerging tourism regions such as South Burnett, where the process of collaboration has not yet been achieved among industry stakeholders. One stakeholder commented on one of the barriers encountered: ‘The lack of cooperation... competitiveness within the region is very fierce...’. Another stated that the barriers encountered included: ‘Lack of product, lack of awareness, lack of people heading in the right direction’.
**Professionalism**
Many of the people operating the wineries in the South Burnett region are from an agricultural background and are very authentic although still developing an understanding of the tourism business and its demands. One stakeholder in the South Burnett commented on the cellar door operators’ attitude:

... to know that you just can’t go out into the cow yard and come in and sell wines in no shoes and a really ratty t-shirt, that’s just not a good image.

**Differentiation**
The South Burnett region offers a product that is unique and promotion is being done to emphasise this. Their promotional material highlights the history of the region and the unique landscapes, using photos of rustic buildings, historic farmsteads and the Bunya Mountains backdrop. South Burnett is utilising these points of differentiation to attract visitors to the area, as two stakeholders stated:

... we have quite a nice little brochure that we can use that promotes the region... we can go out to festivals and say 'look the thing that differentiates us is that we're local, come up and visit' and we get lots of people coming out of that... we do tours and then you can pop off and see this place and that place and the Bunya Mountains is quite close.

... that’s our big emphasis, to make sure that people come up here and go ‘gee what a surprise, this isn’t what we expected, it’s a real pleasure to come up and see something just a little bit different’, very personal and very hands-on and we spend a lot of time and effort on that.

**The People**
In South Burnett, the staff that welcome guests appear genuinely interested in providing insight into their tourism product. It appears that many of the operators in the South Burnett region tend to be farmers or families with a connection to the region.

**Tourism vs. Mass Production**
The South Burnett region is a newly emerging tourism region, for this reason, wine producers cannot focus only on tourism, as one producer commented:

I guess I look at this site that we’ve got not only the opportunity to grow that tourism side of things, but if we can make the wine commercially very successful and develop some export and wholesale business, and get some of our food ingredient business working really strongly, it will actually provide some cash income to continue that tourism development to get the region well-known. So it’s an interesting balance of finding what’s commercially workable but still helping tourism. Tourism can make you a lot of money but because we’re an emerging region you can’t rely on it 100% so you have to augment that with other aspects of the business and I guess what we’ve tried to do is diversify a little bit with food ingredients, cheese and wine.

**Training**
While some isolated stakeholders indicated they had effective training programs in place, such as at Stuart Range Estate, the overall message from stakeholders in South Burnett was that there was a need for training of operators in the region, in particular within the wine industry. In the South Burnett region the majority of operators have a background in the agriculture industry. The South Burnett Tourism Association is aware of this need as identified by the Tourism Project Manager: ‘... that’s one of the things that our wine industry is trying to look at is an educated wine industry’.

**Recommendations**
One of the barriers identified in both regions of this case study was the geographical dispersion of the wineries and/or food/produce venues. It is recommended that, in response to this, there is a need to promote the wine and food attractions within a small geographical area clustered with related attractions such as galleries, historic buildings, markets and natural attractions. According to Europaische Weinstrassen (Hall & Macionis 1998: 201), establishing of a wine tourism or wine trail organisation is a good framework for cooperative work between government, private enterprises and associations, the tourism industry, wineries and the local council, enabling the harnessing of ‘the energies of all involved with regional development’. In addition, when tourists have to drive long distances between venues it is important that opening hours and offerings are clearly articulated and adhered to.

For any region attempting to establish and develop a tourism product like wine and food, there is a need for the business owners to work collaboratively. Hall, Johnson and Mitchell (2000) support this contention,
suggesting that the development of networks is critical to the development of wine tourism in a region as there is a need for businesses that previously have not identified themselves to be part of the same industry to work collaboratively with stakeholders in the tourism industry. A significant challenge remains to increase the collaboration between sectors of the tourism industry. Recognition that the tourist is looking for a destination with enough products to make it a worthwhile experience is still required.

In response to the lack of formal training among tourism industry operators and winery owners, the South Burnett Tourism Development Manager discussed the need for education programs to assist local producers to not only develop their product to high quality standards, but to work as educated operators, ‘so that when you go to a cellar door you get an experience, you don’t just get a wine tasting.’ In order to develop the region there is a level of professionalism required that moves beyond the ‘hobby’ feel to serious business. Further assistance is required in these developing regions to get such education programs operational, and establish monitoring mechanisms.

Hall, Johnson and Mitchell (2000) noted that winemakers often know a lot about the production of wine but little about tourism. Similarly, some of the operators in the South Burnett do not appear to be fully committed to operating as stakeholders with the tourism industry and, as a result, much of the promotional material doesn’t have all the necessary information, e.g. whether there is food available, opening times and what product is on offer. Both regions have developed maps of wine and food trails, yet these could be further developed with additional material including a greater emphasis on the regional produce available from restaurants and food outlets. While many venues offered a platter with some local produce, the explanation and importance of this was not always well-communicated. Similarly, further enhancement or development of menus beyond platters may be worth considering. Further consideration of linking wine and food tourism to other tourism product may be required in order to target different market segments. As an example, historical tourism or wildlife tourism could be incorporated into promotional material. The further development of special events incorporating the regional wine and food identity may also be viable.

Information provided in the promotional material is also an issue given the wide geographic dispersion of these wineries; people need better information on distance between venues to plan their itineraries. Both regions are largely self-drive markets, yet the road signage is still lacking. In areas where geographic dispersion is high, resulting in large distances to be travelled between venues, accurate information is even more important. Decisions based on poor information can be costly if the tourist has to travel 35 or 40km between venues.

The collective network nature of the development of this sort of regional tourism presents challenges. For instance:

... the way that most collectives of people operate is ‘oh, did you hear about this... next week let’s see if we can do something about it’. Always too late, always chasing your tail, people are panicking and they spend a lot of the time running around in circles and that’s not professional.

Planning seems to present a challenge for many newly organised network groups. This research identifies the importance of regional champions that encourage collaboration among the regions stakeholders and foster the development of support mechanisms – such as business planning workshops and assistance with marketing and promotional material.

For both regions the continuing challenge is to develop the authenticity of the region and deliver this to potential tourists in a consistent and reliable manner. If tourists are going to visit a destination for a wine and food experience there needs to be enough product available to satisfy the desire for a range of unique and interesting experiences. The case study regions need to give further consideration to what their tourism product comprises, develop this product to a professional standard and communicate that accurately to potential target markets.

**Conclusion**

This chapter presented the work of two case studies which sought to investigate the level of development in the emerging wine tourism industry within Queensland. The regions selected for this case study are in their infancy. It has been noted that, in particular, attention to product development is required and the positioning of the regions as wine tourism destinations is still challenging. The interviews revealed a high degree of commitment by many community or business personnel but it was not without a sense of competition. Further development of clustering of related tourism activities seems to be warranted, especially in the South Burnett region, to make it a destination tourists will want to stay in for more than a day. The opportunities for the regions include improved promotional information, especially information about opening times and what is available at the wine venue. Our investigation highlighted the important role of clusters or networks in building the tourism product. This seems especially vital at the early lifecycle stage of these regions. The need for individuals who worked beyond self-interest for the good of the community is evident. Such champions seem essential to the successful development of the regions. As South East Queensland continues to grow at a rapid rate, the opportunity to attract more day-trippers and tourists to regional locations exists. However, most of this growing population has
extensive tourism experience and, consequently, high expectations about the tourism experience and the level of service. This provides a challenge for both newly emerging tourism regions such as South Burnett and a mature tourism destination such as Noosa to provide an authentic, differentiated and exciting product that will attract experienced tourists to the region.
Chapter 2

SOUTH AUSTRALIA: BAROSSA VALLEY AND ADELAIDE HILLS

Introduction

This chapter describes two food and wine regions in South Australia— the Barossa Valley and the Adelaide Hills. The study is based on information from primary and secondary sources. Visits to the regions were undertaken by the researchers and interviews were conducted with key players in the regions.

South Australia was settled by free European settlers in 1836. They brought with them the food and wine cultures from their homelands. South Australia now has many regions that have been developed and promoted as wine and food producing regions. The two neighbouring regions were chosen for investigation due to their tourist popularity, their close proximity to Adelaide (the capital city of South Australia), and their differentiated product offering. Both these regions were recognised farming areas within the first ten years of white settlement, but are now differentiated in terms of recognition as wine and/or food regions.

Wine tourism and visits to wineries is an important dimension of tourism in Australia. In 2003, nearly 5 million international and domestic visitors went to a winery in Australia while on a day trip or overnight visit. South Australia’s share of this market (20% of all visits that include visits to wineries, visit a winery in South Australia) is higher than South Australia’s total market share of tourism or its total population share. That is, almost 1 million international and domestic visitors visited a winery in South Australia (South Australian Tourist Commission (SATC) 2000b).

South Australia has 395 wineries; 247 of these have cellar door facilities, 57 have onsite restaurants/light meals available and 25 have onsite accommodation (Winemakers Federation of Australia 2004).

There are 12 tourism regions in South Australia: Adelaide, Adelaide Hills, Barossa, Clare Valley, Eyre Peninsula, Fleurieu Peninsula, Flinders Ranges and outback, Kangaroo Island, Limestone Coast, Murraylands, Riverland and Yorke Peninsula. These regions are related to but not the same as the official wine regions.

There are five main wine tourism regions in South Australia: Barossa Valley, Clare Valley, Fleurieu Peninsula, Limestone Coast and Adelaide Hills. Research commissioned by the South Australia Tourism Commission in 2000 found that visitors to these five wine regions were a mix of overseas (7%), interstate (41%) and intrastate (52%). The average age of the visitors is skewed towards the younger age group, with half male and half female. The majority were employed in professional or white-collar occupations with a high level of disposable income, which would potentially deliver a high yield of tourist dollars to the region. Most visitors travelled to the region in their own vehicles and their main sources of information about the region were word of mouth (42%), brochures (34%) and maps (25%). When respondents were asked about their awareness of the wine regions, 81% were aware of Barossa and 10% were aware of the Adelaide Hills – these being the highest and lowest recognition (SATC 2004).

The Barossa Valley attracted the largest number of cellar door visits at 2.4 million, or 60% of the total. Cellar door attendances in Adelaide Hills were 75,000 (SATC 2004).

As of 2004, South Australia had seven formally recognised wine zones, consisting of 15 wine regions and three sub regions, as shown in Table 10.

---

2 South Australian case study led by Jenny Davies and Lorraine Brown.
Table 10: South Australian wine zones, regions and sub regions

<table>
<thead>
<tr>
<th>Zone</th>
<th>Region</th>
<th>Sub region</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adelaide (Super Zone, includes Mount Lofty Ranges, Fleurieu and Barossa)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Barossa</td>
<td>Barossa Valley</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Eden Valley</td>
<td>High Eden</td>
</tr>
<tr>
<td>Far North</td>
<td>Southern Flinders Ranges</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Currency Creek</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Kangaroo Island</td>
<td></td>
</tr>
<tr>
<td>Fleurieu</td>
<td>Langhorne Creek</td>
<td></td>
</tr>
<tr>
<td></td>
<td>McLaren Vale</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Southern Fleurieu</td>
<td></td>
</tr>
<tr>
<td>Limestone Coast</td>
<td>Coonawarra</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mount Benson</td>
<td>Padthaway</td>
</tr>
<tr>
<td>Lower Murray</td>
<td>Riverland</td>
<td></td>
</tr>
<tr>
<td>Mount Lofty Ranges</td>
<td>Adelaide Hills</td>
<td>Lenswood</td>
</tr>
<tr>
<td></td>
<td>Piccadilly Valley</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Adelaide Plains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Clare Valley</td>
<td></td>
</tr>
<tr>
<td>The Peninsulas</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Australian Wine and Brandy Corporation 2004

**Barossa Valley**

The Barossa Valley is one of Australia’s most mature wine regions and is also a mature tourist area with a regional identity that was established in the late 1800s (see Map 5). The region was first surveyed in 1836 as a potential wine growing district. The region was originally named ‘Barrosa’, meaning ‘Hill of Roses’, by Colonel William Light. Misspelling on later maps gave the region the name ‘Barossa’.

The first European settlers in the Barossa were the British. In 1841, approximately 200 Lutherans from the provinces of Silesia, Brandenburg and Posen came to settle in the Barossa. They developed the village of Bethany and built churches. The German settlers started other villages like Langmeil and Light Pass while the English settled in the town of Angaston and the Barossa Ranges. This combined culture of German and English has created a unique Barossa culture.
In 1842, the first Barossa vines were planted in Bethany for the purpose of providing wine for family use. Five years later, Johann Gramp established the first commercial winery at Jacob’s Creek near Rowland Flat. Yalumba, Henschke and Seppelts wineries were established a few years later.

A period of increased commercialisation and corporate interest in the wine industry emerged between 1970 and 1975. This period was the red wine boom. There was a strong demand for table wine. Many wineries did not have the capital to expand so they were taken over by mainly multi-national food groups. Bethany Wines and Wolf Blass were established at the end of the red wine boom in 1975.

A period of depression followed in 1977 when the supply of unwanted red wines outstripped demand. Vines in the Barossa were ‘pulled’, encouraged by payment from the State Government. Peter Lehmann wines was established in 1979, followed by Rockford Wines in 1984, Jenke Vineyards at Rowland Flat and Willows Vineyard at Light Pass in 1989, and Turkey Flat Winery in 1990.

The period of 1990 to 1999 was one of unprecedented growth for the Australian wine industry. It was also a period of renaissance for the Barossa. Vineyards that were old and dry grown were very highly prized and more wineries were developed.

As at 2000, there were 9313 hectares of vines in the Barossa Valley. Its wineries processed 70,000 tonnes of grapes, representing one-third of the state’s production. Currently there are over 70 wineries and over 50 cellar doors established in the Barossa region, and 541 independent grape growers (SATC 2004).

The maturity of food production and gastronomic tourism are less developed than wine production and sales, although food is being developed and is maturing quickly given that the region’s wine culture is already advanced. Because of its German-Silesian heritage, German-style food has long been recognised as its regional difference, but until recently this was mainly in the form of home cooking and consumption from home grown produce. Early settlers grew vegetables and fruit such as cucumber, cabbages, potatoes, radishes, beetroot, beans, turnips, apples, pears, plums and quinces.

By the end of the 19th century, the German heritage was losing influence. The third generation of immigrants were marrying outside the Lutheran Church and English food was a major influence on diet. During the First World War, people suppressed their German backgrounds and changed their names. German food became unacceptable and when the Barossa Cookery Book was published in 1917 with 400 recipes, it featured food with a British flavour in honour of the soldiers. However, in 1932 in the third edition, German recipes were included. The development of good quality restaurants and cafés began in the 1970s. Maggie and Colin Beer opened the Pheasant Farm Restaurant in 1974 and this became a nationally recognised eating establishment. The number of
food establishments has expanded rapidly in the last 10 years. These include restaurants, cafés, delicatessens and food at wineries. Bakeries have continued to flourish (Barossa Light Development Inc 2005).

**Characteristics of the Barossa Valley Region**

The Barossa Valley is located north of Adelaide. Access to the region is a one-and-a-half hour car or coach trip from Adelaide and is mainly a day trip destination. There is reasonable signposting and visitors can easily drive around. The region comprises both the Barossa Valley and Eden Valley. It is the largest single wine processing region in Australia.

The climate of the Barossa Valley is Mediterranean with hot dry summers and cool wet winters, making it ideal for viticulture. Widely planted varieties of grapes include Shiraz, Cabernet Sauvignon, Riesling, Chardonnay, Semillon and Grenache. The harvest time is late February to late April.

**Accommodation in the Barossa Valley**

The quality of the accommodation varies in all sectors. There is only one resort (Novotel Barossa Resort) and many of the bed and breakfast establishments are located out of the towns (see Table 11).

<table>
<thead>
<tr>
<th>Style</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfast, Cottages, Country Lodges</td>
<td>81</td>
</tr>
<tr>
<td>Hotel/Motel/Resorts (with 15 or more rooms)</td>
<td>9</td>
</tr>
<tr>
<td>Caravan/Tourist parks/Hostels</td>
<td>6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>96</strong></td>
</tr>
</tbody>
</table>

Source: SATC 2003

**Wineries in the Barossa Valley**

Johann Gramp established the first commercial family winery in 1848 at Jacob’s Creek. This winery recently opened the Jacob’s Creek Visitors Centre, which is a large, modern, glass building with a beautiful landscape of vines and hills.

In 2003, there were 70 wineries established in the Barossa, 51 with cellar doors and nine with cafés/restaurants. Twelve wineries are not open to the public (SATC 2002b) (see Table 12). Many of the wineries are boutique with family members involved, although there are also some large wineries which are owned by large international companies. At the cellar door there is a growing trend towards presenting food, such as platters or ploughmen’s lunches, with the wine. Cellar door opening times are in general lengthy but vary, with some wineries opening to accommodate visitors and others open according to their own requirements. For example Rockford does not open on the Sundays, whereas Peter Lehmann opens seven days a week.

A number of wineries sell products in addition to wine and food. For example, Jacob’s Creek Visitors Centre sells wine associated products – corkscrews, pourers, wine, recipe books etc. Other wineries sell local food produce – chutneys, jams, sauces, condiments etc.

The wineries range in size from the very large Jacob’s Creek and Orlando-Wyndham, to medium-size wineries such as Peter Lehmann; to small wineries such as Rockford; to very small and new, like Kabminye. Barossa wine has a favourable international reputation and frequently wins awards, while the quality and diversity of product continues to improve. For example, Peter Lehmann, Wolf Blass and Robert O’Callaghan are well-known both within and outside the region. This wine background of the Barossa provides a strong base on which to develop a total wine, food and cultural experience for visitors.
### Table 12: Wineries of the Barossa

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Cellar Door</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basedow Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Barossa Settlers</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Barossa Cottage Wines</td>
<td>Angaston</td>
<td>Yes</td>
</tr>
<tr>
<td>Barossa Vale Wines Pty Ltd</td>
<td>Light Pass</td>
<td>Yes</td>
</tr>
<tr>
<td>Barossa Valley Estate Ltd</td>
<td>Marananga</td>
<td>Yes</td>
</tr>
<tr>
<td>Barossa Vines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Bethany Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Burge Family Winemakers</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Cellarmaster Wines</td>
<td>Tanunda</td>
<td>No</td>
</tr>
<tr>
<td>Charles Melton Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Charles Cimicky Wines</td>
<td>Lyndoch</td>
<td></td>
</tr>
<tr>
<td>Chateau Barossa</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Chateau Dorrien</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Chateau Tanunda Estate</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Craneford Winery</td>
<td>Truro</td>
<td>Yes</td>
</tr>
<tr>
<td>Concordia Fruit Wines</td>
<td>Gawler</td>
<td></td>
</tr>
<tr>
<td>Dutschke Wines</td>
<td>Lyndoch</td>
<td>No</td>
</tr>
<tr>
<td>Elderton Wines</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Glaetzer Wines Pty Ltd</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Gnadenfrei Estate Pty Ltd</td>
<td>Marananga</td>
<td>No</td>
</tr>
<tr>
<td>Grant Burge Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Greenock Creek Cellars</td>
<td>Seppeltsfield</td>
<td>Yes</td>
</tr>
<tr>
<td>Haan Wines</td>
<td>Tanunda</td>
<td>No</td>
</tr>
<tr>
<td>Hamilton’s Ewell Vineyards</td>
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</tr>
<tr>
<td>Hartz Barn Wines</td>
<td>Moculta</td>
<td></td>
</tr>
<tr>
<td>Henschke Wines</td>
<td>Keyneton</td>
<td>Yes</td>
</tr>
<tr>
<td>Heritage Wines</td>
<td>Marananga</td>
<td>No</td>
</tr>
<tr>
<td>Irvine Wines</td>
<td>Eden Valley</td>
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</tr>
<tr>
<td>Jacob’s Creek Visitor Centre</td>
<td>Rowland Flat</td>
<td>Yes</td>
</tr>
<tr>
<td>Jenke Vineyards</td>
<td>Rowland Flat</td>
<td>Yes</td>
</tr>
<tr>
<td>Kaesler Wines</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Karl Seppelt – Grand Cru Estate</td>
<td>Springton</td>
<td>Yes</td>
</tr>
<tr>
<td>Kellermeister and Trevor Jones Wines</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Kies Family Wines</td>
<td>Lyndoch</td>
<td>Yes</td>
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<tr>
<td>Langmeil Winery</td>
<td>Tanunda</td>
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</tr>
<tr>
<td>Liebichwein</td>
<td>Rowland Flat</td>
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</tr>
<tr>
<td>Miranda Family Winemakers</td>
<td>Rowland Flat</td>
<td>Yes</td>
</tr>
<tr>
<td>Mountadam Winery</td>
<td>Eden Valley</td>
<td>Yes</td>
</tr>
<tr>
<td>Peter Lehmann Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Farm/Shop Name</td>
<td>Location</td>
<td>Open?</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>Pheasant Farm/Beer Brothers at Maggie Beer’s Farm Shop</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Penfolds</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Richmond Grove Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Rockford Wines</td>
<td>Tanunda</td>
<td>Yes</td>
</tr>
<tr>
<td>Rosenvale Wines</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Ross Estate Wines</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Saltram Wine Estate</td>
<td>Angaston</td>
<td>Yes</td>
</tr>
<tr>
<td>Schild Estate Wines</td>
<td>Lyndoch</td>
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<tr>
<td>Seppelt Winery</td>
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<tr>
<td>Springton Cellars</td>
<td>Springer</td>
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<td>St Hallet Wines</td>
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<tr>
<td>Stanley Brothers Winery</td>
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</tr>
<tr>
<td>Thorn-Clarke Wines</td>
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</tr>
<tr>
<td>Torbreck Vintners</td>
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<tr>
<td>Turkey Flat Vineyards</td>
<td>Tanunda</td>
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</tr>
<tr>
<td>Veritas Wines</td>
<td>Seppeltsfield</td>
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<tr>
<td>Villa Tinto</td>
<td>Tanunda</td>
<td>by appt</td>
</tr>
<tr>
<td>Vinecrest Fine Barossa Wine</td>
<td>Tanunda</td>
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</tr>
<tr>
<td>Whistler Wines</td>
<td>Marananga</td>
<td>Yes</td>
</tr>
<tr>
<td>Willows Vineyard</td>
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<td>Yes</td>
</tr>
<tr>
<td>Wolf Blass Wines</td>
<td>Nuriootpa</td>
<td>Yes</td>
</tr>
<tr>
<td>Yaldara Estate</td>
<td>Lyndoch</td>
<td>Yes</td>
</tr>
<tr>
<td>Yalumba</td>
<td>Angaston</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Source: Barossa Marketing 2004

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**Events Held in the Barossa Valley Region**

The Barossa holds many events during the year. The list below shows some examples.

**Barossa Vintage Festival**

This festival is held at various venues throughout the Barossa Valley. It is Australia’s largest wine festival, with more than 100 events and activities spread over a week as the community celebrates vintage. It is usually held biannually for one week, beginning on Easter Monday.

**Barossa Under the Stars**

This event features an exclusive South Australian appearance of an international performer at an ‘under the stars’ setting in the Barossa. It has been held annually in February or March.

**Barossa Jazz Weekend**

Jazz musicians perform in cellar doors over a weekend in August. Barossa wine and food is always on offer.

**Barossa Wine Show**

In this event, more than 450 wines are made available for tasting, including award and trophy winning wines. It is hosted at Yalumba Winery in Angaston and held for a day in September.

**Barossa Festival of Music**

A festival of music, usually classical, is held in the month of October. It features international and Australian artists.
Special Food Attractions in the Barossa Valley

The domestic food culture of the Barossa has always been strong. However, in the last decade the commercial food culture has been developing. Cereals, potatoes, vegetables, pomme fruit, stone fruit, nuts, olives, strawberries, beef, lamb, pork, chicken, eggs, honey and honeycomb are grown in the Barossa.

Examples of special food attractions in the Barossa are listed below.

**Barossa Farmers Market**
This market is held every Saturday morning in the old Vintners Shed near Angaston. It features very fresh, local produce sourced from the Barossa region. This has been a success story of very recent years. It has provided an outlet for local producers to sell fresh and value-add to their products. It is used by both locals and visitors and in many cases produce is sold out by early to mid-morning. Produce includes fresh fruit and vegetables, bottled condiments, fresh bread, wine, oil, meat, etc.

**South Australian Company Store**
This store is located in Angaston. It showcases a selection of the best gourmet products and quality gifts from South Australia’s twelve diverse regions. The South Australian Company Store features produce with a rich heritage of food traditions originating in many parts of the world. It also features art, craft and jewellery from over one hundred South Australian artists and producers.

**Angas Park Fruit Company**
This company was established in the Barossa Valley in 1911 and sells a variety of the very finest sun-dried Australian fruit. Its extensive range of products includes dried and glace fruit, confectionery, nuts, chocolate products, honey, speciality gifts and souvenirs and many other South Australian products.

**Lyndoch Lavender Farm**
This farm has spectacular views of the Barossa and is set in peaceful surroundings. Forty-five different varieties of lavender are grown. Tea, coffee and lavender tastings are available. There are also demonstrations with lavender plants and products are for sale.

**Chateau Barossa**
Chateau Barossa features a 30-year-old rose garden with thousands of rose bushes, a wine museum with wine tasting, grape nectar tasting, a motel and a gift shop.

**Maggie Beer’s Farm Shop**
Maggie Beer’s Farm Shop is located at the Pheasant Farm near Nuriootpa. It is described as a ‘foodie’s heaven’ where visitors are able to enjoy a glass of wine, an espresso coffee, or an antipasto plate and other menu items. The menu is revised on a monthly basis, designed using fresh, local, seasonal produce. Tastings of Maggie Beer products, Barossa Farm Produce, seasonal specialities and Pheasant Farm and Beer Brothers wines are available.

**Restaurants and Cafés in the Barossa Valley**
Restaurants in the Barossa offer a variety of menus ranging from traditional German to Swiss, Thai, local Australian and exclusive Barossa dishes. In 2001 there were more than 27 restaurants in the region offering excellent quality food and service, ranging from informal garden bistro dining to formal restaurant dining. There are also 34 cafés/tea-rooms or bakeries to provide light snacks, lunch or a coffee throughout the Barossa.

**Visitor Centres in the Barossa Valley**
There are four visitor information centres in the Barossa Valley – Gawler, Barossa Wine and Visitor Information Centre at Tanunda, Lyndoch and Jacob’s Creek Visitor Centre. The Barossa Wine Centre offers educational wine tours as well as visitor information.

**Visitor Numbers and Activities in the Barossa Valley**

**Visitor Profile**
In 2003, the Barossa attracted 841,000 domestic visitors and 237,000 overnight visitors staying 723,000 nights. There were 21,000 international visitors. Six-and-a-half% of all overnight visits in regional South Australia
included a stay in the Barossa. Thirty-four per cent of domestic visitors were from interstate; the breakdown being – Victoria 15%, Queensland 10%, New South Wales 3% and Australian Capital Territory 2%. Nearly half (46%) of the visits to the region were by Adelaide residents. Of the international visitors, 18% were from the United Kingdom, 15% from Germany, 31% from Other Europe and 21% from North America. Of the 723,000 nights international and domestic visitors spent in Barossa in 2003, 44% of all nights were spent at a friend/relative’s property and 21% in a hotel/motel. Barossa had the highest proportion of nights spent in bed and breakfast or guesthouse accommodation (10%) of any South Australian region, reflecting the match of this style of accommodation with the short break, luxury type of visit attracted to the region (SATC 2004).

Length of stay varied from 3.5 nights for interstate visitors to 2.4 for South Australians and 5.6 for internationals, with longer staying internationals visiting friends and relatives contributing to the relatively long average length of stay in the region by international visitors (SATC 2004).

In 2003, 49% of domestic holiday/visiting friends and relatives visitors to Barossa were female and 51% were male. The most common age group was 25-44 years (37%), followed by 33% aged 45-64 years. The Barossa had the highest proportion (17%) of visitors aged 70 or over of any South Australia region (SATC 2004).

Sixty-one per cent of domestic holiday/visiting friends and relatives visitors to Barossa visited as an adult couple. The next most common travel party type were families of parents and children (17%) and friends/relatives travelling without children (11%) (SATC 2004).

Purpose of Trip
For domestic visitors, the Barossa is mainly a short break destination. Eighty-two per cent of domestic visitors visit the region for one to three nights and 36% for a single night. Sixty-three per cent of visitors spend all nights at one destination. This reflects a pattern of short breaks spent entirely in the region. Ninety-two per cent of international visitors gave holiday as a reason for visiting the Barossa.

Visitor Activities
Ninety-three% of domestic visitors to the Barossa used a private car to travel to the region, highlighting the Barossa to be a largely self-drive destination.

Higher proportions (43%) of domestic visitors visit wineries than in any other region. Other activities visitors engage in include sightseeing (46%), eating out (63%) and visiting friends and relatives (42%). Also, a significant number of domestic visitors visit art and craft workshops, while others attend theatre/concerts and visit festivals/fairs.

Compared to most other South Australia regions, a high proportion of domestic holiday/visiting friends and relatives visitors to the Barossa are:

- from interstate (34%), particularly Victoria and Queensland;
- aged 65 or over;
- visiting the region as an adult couple (61%);
- in a life cycle stage of older married person, young/midlife couple with no children, or older single;
- on a short break visit to the region of one to three nights (83%);
- personally identified as Luxury Travellers (29%) on their trip;
- staying in a guest house or bed and breakfast;
- participating in visiting wineries (43%) and eating out at restaurants (63%);
- on a trip defined either as a Short Tour or Big Tour under the BDA Holiday Typologies, which look at travel patterns and behaviour of visitors. The BDA Holiday Typology Segmentation identifies a range of segments, including: grand tourers, group travellers, short tourers, beach holiday, big tourers, weekend away, city lights, fly and stay, country escape, holiday house, special events and visiting friends and relatives (SATC 2004).

Marketing of the Barossa Valley Region
The Barossa Valley is one of the top three tourist destinations in South Australia and is important in positioning South Australia as the place to visit for quality food, wine and festival experiences in a setting with strong heritage links and readily accessible nature experiences. The region is the most recognised icon outside of Adelaide and is one of the most identified regions by South Australian residents for taking visitors. Internationally it is also recognised.

Quality food and wine experience is the core theme, linking to a unique heritage, retention of traditional aspects, a rural setting with proximity to natural environments and festivals that build on the themes of wine, German heritage and enjoying the good life (Barossa Light Development Inc 2003).

In a report that presented the results of a market research study conducted by the South Australian Tourism Commission in 2000, the Barossa was described as ‘tranquil, easy to get to, and had a strong association with
wine regions in Europe.’ The researchers used the term ‘conviviality’ as a metaphor for the region (SATC 2000a).

The South Australian Tourism Commission has fiercely promoted the State’s wine and food competitive advantages in interstate and international marketing campaigns. Recent research on the impact of the ‘Secrets’ campaign (HWR Media & Communications 2002) in Sydney and Melbourne found that South Australia is most strongly associated with wine and food (SATC 2000a).

**Food and Wine Regional Development Groups in the Barossa Valley**

Food Barossa and Barossa Light Development Inc. are the two groups identified that are influencing the development of food in the Barossa Valley region.

**Barossa Light Development Inc. (BLD)**

BLD was established by the state government and local councils. It aims to foster activities which improve economic output and create employment which is sustainable and consistent with the social, cultural and environmental aspirations of the Barossa Light Region and which contributes to the broader regional development objectives of the State and Commonwealth Governments.

BLD has identified several broad areas of regional development opportunity for the Barossa Light Region. These include:

- Food production and processing;
- Water resources;
- Transport;
- Industry development;
- Education, training/employment;
- Tourism development;
- Information technology and communications;
- Utilities;
- Diversification of agriculture;
- Minerals and stone; and
- Environmental management.

**Food Barossa**

Food Barossa is a pioneering regional food brand for Australia. It was launched in the Barossa in 2002 after extensive investigation into the food of the region and how it might best be developed and marketed. Barossa Light Development Inc. view Food Barossa as a link between the food and wine industries being integral to the social and economic fabric of the region. This group was able to put collaboration before competition. They recognised that they could add value to food crops and help address the issues that small producers experience when attempting to produce and sell to a wider market.

Food Barossa is unique in that it is based on geographical boundaries, products are grown, produced or processed in the region, companies have hazard analysis critical control point or other food safety accreditation, and the owners of the companies are personally involved in making their goods. Also, specific product groups identify common methods and traditions that underpin their food. For example, the smoked meats food group identify common methods that underpin Metwurst production. Members can display the Food Barossa logo (the cork and fork) once they comply with the Food Barossa requirements.

The food groups are:

- Baked goods;
- Speciality baked goods;
- Smoked meats;
- Confectionery;
- Condiments and sauces;
- Dried fruits;
- Olive oils and vinegars;
- Noodles;
- Fresh meats; and
- Eggs.

Food Barossa is perceived as a model for other regions and the Marketing Officer has been invited to other regions in South Australia to assist in the development of regional food.
Interviews

Interviews were conducted onsite with Lisa Davies, Wine Tourism Development, Australian Federation of Winemakers (at time of interview); Linda Bowles, South Australia Wine and Brandy Corporation; David Kalleske, Manager, Rockford Wines; Margaret Lehmann, Peter Lehmann Wines and Food Barossa; Maggie Beer, Maggie Beer Products; and Angela Heuzenroeder, food and regional historian.

Lisa Davies, Australian Federation of Winemakers and Linda Bowles, South Australia Wine & Brandy

Several issues relating to the development of food and wine tourism in Australia were raised in this interview.

From an industry perspective, food in South Australia is improving significantly in quality, availability and presentation. The food industry’s profile is growing, as is recognition that food and wine producers need to grow together to create synergistic outcomes in the development of the tourism industry.

In developing food and wine tourism, the industry aims to create an Australian wine brand, an Australian food brand and a South Australian food, wine and tourism brand to build a reputation for products under the brands and to guarantee quality. Through research, the industry has determined that factors such as the reputation of a region’s food and wine, the scenery and the accommodation tend to draw tourists to visit the region. The overall experience is a motivating factor for tourists. Businesses can enhance this tourist experience by providing a quality product (e.g. wine) and combining it with something ‘outside the square’ (e.g. art gallery).

The lack of consumer research has resulted in the industry failing to understand the needs of tourists and the processes they undertake to obtain information about their destinations. It is necessary for the industry to determine these needs and address them. To this end, research investigating specific industries’ information needs is required. Research outcomes need to be accessible by industry stakeholders to allow industry members to utilise this information in developing and marketing their product.

David Kalleske – Manager, Rockford Wines

The tourist’s perception is that of a rustic winery with a long history resulting from the winemakers’ determination to produce wine using traditional equipment and traditional methods, despite the trend toward modernisation within the growing wine market. Rockford winery is almost museum-like, having been established in the early 1970s when winemaker Robert O’Callaghan bought a 1850s cottage and built the winery around a courtyard out of the same materials. The wine is made using two custom-made basket presses, a traditional device for pressing red wines which is more labour intensive than modern alternatives but generally gives a better result. Production is limited due to the traditional methods utilised, enhancing the perception of authenticity and increasing demand for their wines. Robert O’Callaghan holds the tourist experience of the winery in high regard; however the winery is closed on Sundays to restrict ‘tourist’ visitor numbers to the winery. He aims to develop and maintain a personal relationship with his customers. Robert O’Callaghan has maintained his philosophy to collaborate with other businesses within the Barossa region, supporting, promoting and working with them. He sources his products only from those within the region and fosters relationships with the local chefs to marry their food with Rockford Wines.

Margaret Lehmann – Peter Lehmann Wines and Food Barossa

In this interview, Margaret discussed Food Barossa, the first South Australia accredited regional food brand, and its role in the development of food in the Barossa Valley region. She explained how regional specialities were identified and made known to the world through Food Barossa.

Under this label, small producers are represented and offered assistance to enable their businesses to grow. The region has its own uniqueness and identity. Each food that carries the Food Barossa label has its own criteria and must conform to strict regulations before it is passed. The producers must be licensed to produce the food endorsed by this label, guaranteeing its authenticity and quality. The food is sourced from the region and must be grown, packed, produced and processed in the Barossa Valley.

The community shares a sense of regional pride and there is continual support and respect within the businesses that work together to develop food in the Barossa. Their community is unified and aims to build a unique reputation for the region. This is being achieved by the events continually being held in the region, such as the Barossa Gourmet Weekends, Vintage Festival, Tasting Australia events and the farmers market.

From a tourism perspective, it is important for the food of the Barossa to be linked to its wine in order to complete the picture of the Barossa. The region maintains a positive approach to food and wine tourism by encouraging the growth of businesses within the region and enhancing the experience of the visitor as they discover the Barossa Valley.
Maggie Beer

Maggie Beer explained the uniqueness of the Barossa, highlighting its living peasant culture and the cohesiveness of the community which make the region so successful.

Her role in the development of food in the Barossa is centred on the philosophy that the produce derived from the region is to be used in the most authentic way possible. In Maggie Beer products, no preservatives are used and no shortcuts are taken in the production of her goods. She has invested heavily in her kitchens to uphold her position as a niche market producer, driven by a passion for what she is doing using the rich produce of the region, rather than money. The Farm Shop exports pastes, jams and sauces internationally.

Maggie is supportive of events that promote regional food, such as Tasting Australia, which provide a forum to bring the regions together. She believes that the food of Australia first begins in regions; ‘...it [the food] starts in the country areas and then comes through to the cities’. Community and local support are vital to the development of food and wine in the Barossa Valley.

There is a strong sense of community in the Barossa which Maggie puts down to ‘a love of food, wine, music and art and all those things’. This community is lead by a group of champions – people that are fascinated by food and wine, and it is their life; people that were born in the Barossa so the cultural heritage is there and that is what makes the difference between the Barossa and other regions. The result is a rich community of people with a ‘food culture’ that includes a number of key leaders that are innovative thinkers and creative people.

It was a passion for what the region had to offer that led to Maggie Beer and her husband settling in the Barossa and starting Pheasant Farm, and a passion for the community and the produce she is now working with to produce Maggie Beer products that inspires her to continue developing new and innovative products that assist in the promotion of Barossa food and the region as a whole.

Angela Heuzenroeder

Angela discussed traditional Barossan food – meats cooked using a slow cooking method or glazed over vine sticks to give a smoky flavour; poultry, lamb, kid, rabbit and duck would be common sights in early Barossa farmyards; fennel, broad beans, peas, tomatoes and carrots. Methods of preservation such as drying, salting, smoking and fermenting were used and these ingredients and the traditional principles of cooking are used and re-interpreted by the chefs today in the Barossa Valley – revitalising the old peasant food culture. The cheeses now being produced in the region are not directly related to the cheeses people traditionally made.

In discussing the produce of the region and the farmers market, which has now been running for almost one year, Angela referred to the summer produce, stating, ‘When all of that [produce] comes in summer, people are proud’. Festivals in this region date back to around 1947 and it is the local festivals that continue to preserve the traditional Barossan foods, as Angela explains, ‘There’s public food and private food’, private food with its roots in the homes of the local people only comes into the public arena via the local festivals.

Commercialising the traditional foods of the Barossa unavoidably changes the food ‘both in terms of the nature of eating, and the nature of sharing, the concept of preparing and the quality of the food; it’s very hard to reproduce privately prepared food’.

It is for this reason that, rather than trying to reproduce, the chefs need to revitalise traditional dishes, ‘being mindful of the principles and ingredients’ as Maggie Beer does in many of her dishes.

There is an increasing awareness that the food of the Barossa is as important as the wine, and this is the result of the influence of a number of ‘food passionate’ individuals. The development of the Barossan food culture is something that Angela is encouraging.

Angela’s research has been partly developed by speaking to the early settlers – their arrival, their hardships, persecutions during the Wars and how they made their living from the land. The region became known to the world through the media firstly due to its musical background – a couple of local pioneer organists that made organs for the Lutheran churches. The media then featured the Barossa as a potential for tourism development, with the growth of the Vintage Festival and resulting celebration of their German heritage. This resulted in a ‘a bit of cultural confusion’, which Angela feels needs some clarifying and has led to her ongoing research into the traditional foods of the people that settled in the region.

Within the region there is a certain amount of anxiety as those people that have been producing the traditional butcher lines on a commercial basis are growing old and their children are not interested in taking over. There are some efforts being made within the local TAFE to teach students about the traditional foods of the region but this is something that needs to be developed more in both the TAFE sector and schools if the next generation are to maintain the traditions of the region when faced with the competition of large supermarket chains. The other barrier to continuing these traditions is the fact that the people with this knowledge ‘guard their recipes very jealously, which is another problem... they may be on the point of extinction and they may go to the grave’.

Tourism has had a big impact on the region. It has invigorated and livened up the Barossa, however there are different kinds of tourists, and some pursue cultural tourism. The drunken behaviour of some tourist segments has given the Barossa a bad name, however more and more people are enjoying eating and staying in the region. A number of businesses have developed as a result of the tourist numbers, in particular the gift, craft and home ware shops. The festivals are sustained by tourists; attended by tourists more so than the local
community who work hard at maintaining the produce sold at the markets and festivals. The growth of tourism has been achieved by community effort, not effort that is paid for, and it brings the community together where once the church would have.

Key Themes Emerging

There are four key themes that come from this investigation into the Barossa Valley – collaboration, leadership, developing brands and pride in the region.

Collaboration

Collaboration, being key to regional tourism development, has been evident in the Barossa Valley from the days of the first settlement and continues today. The wine industry in the Barossa certainly has this to its advantage when the emerging regions are struggling to develop collaborative relationships among wine and food tourism stakeholders. As one interviewee stated:

Another feature of community life in the Barossa which has tended to draw people from neighbouring and rivalling towns together was the events organised by the wineries... there were several wine making families who were almost like dynasties: the Seppelts, the Grampes, the Hill Smiths were the main trio and others in between... they were all working for the prominent cause, the wine industry... there was always this very community-minded winery group which gives money to support local ventures.

Tourism has grown and with it the festivals and events of the region. Collaboration among many community members has enabled this growth:

The local people, apart from putting in a lot of community effort and working for the Vintage Festival, during the week when there are events on, they are all working. So people who go to them are by and large visitors to the valley... So much has been achieved by community effort; you don’t get paid for your effort.

There is a feeling that it is this community, the collaboration, pride and support, that is the enabling factor, without this the product would not be as authentic;

I’m very proud of the Barossa... it was the fact that even though their show was at my home, the whole community was involved... it was the feeling of it being community... They felt it...they know when something is contrived or authentic. What we have in the Barossa is such a sense of community and it’s to do with love of food and wine... and music and art and all those things.

Leadership

There is evidence of a number of regional champions in the Barossa now and historically that have had a strong influence on the strength and pride of the region. Wine industry champions now include Peter Lehmann, who became a champion during the ‘vine pull’ in the mid 1980s when the Australian government offered growers money to grub up their vines; roughly one hundred top sites were lost and have not since been replaced. There were, however, around 800 growers, so there were still plenty of plots left. Peter Lehmann is described as a revolutionary for his actions at this time when he led the resurrection of winemaking in the Barossa in 1985-87, bringing the growers together in an almost co-operative venture. Peter Lehmann, although officially retired, continues to champion the Barossa and its wines.

The Barossa wineries have long been, and still are, innovators in the many aspects of wine production. Maggie Beer stated:

There are always leaders aren’t there, and in the Barossa there was a group of people... great food and wine people... And it was their life, absolute life. And they put on the most amazing picnics and they were the first to do so many things.

Other regional champions highlighted during this research included Maggie Beer, who continues to champion the Barossa Valley through her commitment to the region and showing this commitment whenever possible, often through the media and by the quality and innovation of her product range. Margaret Lehmann expresses great passion for the Barossa and played a key role in the region’s growth following the depression of the 1970s. Margaret was instrumental in the development of Food Barossa and the Barossa Farmers Market.

Angela Heuzenroeder told the region about its own food history which has encouraged people to take pride in their product and history. She has researched the food history, thoroughly and gone into people’s kitchens to ensure authenticity. She has worked on many volunteer committees to help enhance the Barossa Valley. Her book, ‘Barossa Food’ (Heuzenroeder 1999), is a detailed account of food and culture in the region.
Developing Brands
Food Barossa has developed a distinctive Barossa identity believed to be world class because:

*It combines the cultural/historical regionality and the commonly used foods of the regions, those that are reared, grown or caught in the valley.* (Lehmann 2005)

Its success is dependent not only on establishing markets, but also on the availability of the product and the individual interests of the small producers who make up Food Barossa as to the volume and broadening of the product range.

The Barossa Farmers Market has been a huge success, as has Food Barossa and the continued promotion of the region’s produce and producers through events, such as Tasting Australia, and the work of people, such as Maggie Beer, will ensure the region continues to grow by maintaining the use of traditional principles and ingredients that are available, but being innovative in the way the ingredients are being put together.

The South Australian Tourism Commission and the Barossa Tourist Centre continue to work to develop the Barossa tourism brand. The development of better music and conference facilities through the relatively new Faith College has helped to enhance the Barossa brand.

Pride in the Region
The overall pride of people in the Barossa Valley is enormous and this was evident in all the interviews conducted. The producers are proud of their produce and encourage pride in the region with continued involvement in community-driven projects, such as Food Barossa and the Farmers Markets. Individuals have influenced this by their encouragement to producers to maintain the authenticity and integrity of their product.

Adelaide Hills
The Adelaide Hills is located 20-30 minutes from the Adelaide CBD (see Map 6). It is known for its scenery, panoramic views of the hills and the city, and its food produce. The area is also known for its cool climate wines, fresh local produce, restaurants, pubs, cafés, gardens, art galleries, antique shops and many nature tourism opportunities. The region is rich in heritage and culture. The Adelaide Hills are part of the Mount Lofty Ranges; Mount Lofty being a popular tourist spot with magnificent views of the city and Adelaide plains and the highest point in the Adelaide Hills.

Map 6: Adelaide Hills
The Adelaide Hills can be considered South Australia’s first tourist area, as the wealthy citizens of Adelaide used it as their base from early settlement times. The Adelaide Plains were found to be too hot during summer, so the early British settlers made their permanent or summer homes in the Adelaide Hills. The development of the railway through to the Hills helped this growth. The area is home to the Kuarna Aboriginal people, with Europeans coming in the late 1830s. John Barton Hack at Echunga Springs, near Mount Barker, planted the first vines in 1839. John Dunn, who was offered free land to build a flourmill at Mount Barker, was also amongst the first to plant vines. Mount Barker was officially recognised by King William IV in 1834, giving it the privilege of existing prior to the colonisation of South Australia. Prussian and East German immigrants settled in Hahndorf in 1839 and grew farm produce for a ready market in Adelaide. Young German women packed eggs, butter and vegetables into basket and walked 25 kilometres through the night to sell their products in Adelaide.

The Adelaide Hills region is comprised of a number of sub-regions or areas, namely the Mount Lofty area, the Norton Summit area, the Torrens Valley, the Onkaparinga Valley, Hahndorf and Mount Barker.

Each of these sub-regions is comprised of a number of towns, as shown in Table 13.

<table>
<thead>
<tr>
<th>Mount Lofty</th>
<th>Norton Summit</th>
<th>Torrens Valley</th>
<th>Onkaparinga Valley</th>
<th>Hahndorf</th>
<th>Mount Barker</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mt Lofty</td>
<td>Norton Summit</td>
<td>Houghton</td>
<td>Littlehampton</td>
<td>Hahndorf</td>
<td>Mt Barker</td>
</tr>
<tr>
<td>Piccadilly</td>
<td>Basket Range</td>
<td>Inglewood/Paracombe</td>
<td>Verdun</td>
<td></td>
<td>Nairne</td>
</tr>
<tr>
<td>Crafers</td>
<td>Cherryville</td>
<td>Cudlee Creek</td>
<td>Balhannah</td>
<td></td>
<td>Macclesfield</td>
</tr>
<tr>
<td>Stirling</td>
<td>Uraidla</td>
<td>Kersbrook</td>
<td>Oakbank</td>
<td></td>
<td>Echunga</td>
</tr>
<tr>
<td>Aldgate</td>
<td>Summertown</td>
<td>Forreston</td>
<td>Woodside</td>
<td></td>
<td>Meadows</td>
</tr>
<tr>
<td>Bridgewater</td>
<td>Gumeracha</td>
<td>Kenton Valley</td>
<td>Forest Range</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mylor</td>
<td>Mt Torrens</td>
<td>Birdwood</td>
<td>Lobethal</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Mt Pleasant</td>
<td>Mt Torrens</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Characteristics of the Adelaide Hills**

The Adelaide Hills consists of many small towns spread over a large area of the Hills, and it lacks the regional identity or integration that is found in the Barossa Valley. The attractive scenery, panoramic views and nearness to the city and centre of population have long been a pull factor. The production of food has been and remains an important part of the economy. Vegetables (e.g. broccoli, brussels sprouts, onions and potatoes) and fruit (e.g. apples, pears, strawberries and cherries) are grown and some value-adding occurs, for example, converting strawberries into jams. The nearness of the Hills to the Adelaide market increases viability (as was true in the earlier days).

The Adelaide Hills is not strongly branded as a wine region (although Petaluma-Bridgewater Mill and Brian Croser’s name are closely associated with the Adelaide Hills) and is more likely to be associated with walking/cycling trails or arts, crafts, antiques and good restaurants.
Accommodation in the Adelaide Hills

Table 14 presents a profile of the Adelaide Hills accommodation available in 2003.

**Table 14: Accommodation types, Adelaide Hills**

<table>
<thead>
<tr>
<th>Style</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfast</td>
<td>21</td>
</tr>
<tr>
<td>Self Contained Cottage luxury</td>
<td>9</td>
</tr>
<tr>
<td>Self Contained Cottage standard</td>
<td>44</td>
</tr>
<tr>
<td>Hotel</td>
<td>1</td>
</tr>
<tr>
<td>Motel</td>
<td>1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>76</strong></td>
</tr>
</tbody>
</table>

Source: SATC 2003a

The Adelaide Hills as a Food Region

The history of food in the Adelaide Hills began with the settlement of Hahndorf by Prussian and East German immigrants in 1839, making it the oldest surviving German settlement in Australia. Its original inhabitants were farmers who produced many items that had a ready market in Adelaide. Today, authentic German pastries and smallgoods, modern Australian cuisine and country-style cooking are on offer.

Mount Barker was settled by people from the British Isles in 1839. In 1844, construction of the Mount Barker Flour Mill was underway. It was a steam-driven mill, marking the start of a large and prosperous industry. Today the Mill houses a coffee shop and bed and breakfast accommodation. Millie’s bakery was established in 1880 and was one of the Hills’ finest bakeries.

By 1885, a quarter of Aldgate’s population was made up of gardeners, farmers or landowners who derived a living from the land.

The Hills are home to some of South Australia’s premium food producers, many of which open to the public. There are opportunities to pick your own strawberries at a number of strawberry farms, to pick cherries at the cherry orchards or purchase smoked salmon from Mount Barker. There is a wide selection of restaurants, cafés, bakeries and pubs scattered throughout the region.

The Adelaide Hills as a Wine Region

The history of wine in the Adelaide Hills first began in 1839 when wine grapes were first planted in the region. Hock from Echunga was the first South Australian wine to be exported, in 1845. It was sent as a gift to Queen Victoria and made by Walter Duffield, who is believed to be South Australia’s first commercial winemaker.

In the period 1840 to 1900, there were 195 Anglo-Saxon and German grape growers and winemakers in the Adelaide Hills, with vineyards extending from Meadows in the south, through Echunga, Hahndorf, Stirling, Woodside and Gumeracha, to Kersbrook in the north. In 1871, production reached 160,000 gallons from 1350 acres in the Hills and foothills. By 1920, all viticultural activity had ceased due to changing tastes and export demand. Beer, fortified wines, spirits and big reds were in fashion for export.

The region later re-emerged in 1971 with Jan and Leigh Verrall’s plantings at Lower Hermitage. In 1979, Brian Croser began planting in the Piccadilly Valley and produced wine under the Petaluma brand.

In addition to the wineries and vineyards, there is a strong pub culture in the Adelaide Hills, with many establishments offering good beers and Adelaide Hills’ wines.

The diversity of the climatic zones and soils in the Adelaide Hills region enables winemakers to produce subtle variations in their wines. The folds and undulations of the Hills create a wide range of mesoclimates. The vineyards are generally small in area and quite steep. Hand pruning and picking is often a necessity as well as a choice.
Wineries in the Adelaide Hills

The Adelaide Hills is one of Australia’s premium cool climate wine regions. Some cellar doors are open every day, others at weekends and some only by appointment (see Table 15). Adelaide Hills produce is promoted at some cellar doors and made available to complement the wines.

There are now more than 3250 hectares of vineyards in the region, over 50 wine labels plus 12 wineries, with others planned.

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
<th>Size</th>
<th>Cellar Door</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aldgate Ridge Vineyard</td>
<td>Aldgate</td>
<td>3 ha</td>
<td>No</td>
</tr>
<tr>
<td>Arranmore Vineyard</td>
<td>Carey Gully</td>
<td>2 ha</td>
<td>No</td>
</tr>
<tr>
<td>Ashton Hills Vineyard</td>
<td>Ashton</td>
<td>3 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Barratt Wines</td>
<td>Summertown</td>
<td>5.5 ha + 3.2 ha</td>
<td>No</td>
</tr>
<tr>
<td>Basket Range Wines</td>
<td>Basket Range</td>
<td>2.2 ha</td>
<td>No</td>
</tr>
<tr>
<td>Bird in Hand</td>
<td>Woodside</td>
<td>24 ha</td>
<td>No</td>
</tr>
<tr>
<td>Birdwood Estate Wines</td>
<td>Birdwood</td>
<td>6 ha</td>
<td>No</td>
</tr>
<tr>
<td>Cawdor Wines</td>
<td>Echunga</td>
<td>19 ha</td>
<td>No</td>
</tr>
<tr>
<td>Chain of Ponds</td>
<td>Gumeracha</td>
<td>160 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Cobb’s Hill Vineyard</td>
<td>Oakbank</td>
<td>10 ha</td>
<td>No</td>
</tr>
<tr>
<td>Geoff Hardy Wines</td>
<td>Kuitpo</td>
<td>30 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Geoff Weaver</td>
<td>Lenswood</td>
<td>14 ha</td>
<td>No</td>
</tr>
<tr>
<td>Golding Wines</td>
<td>Lenswood</td>
<td>15 ha</td>
<td>No</td>
</tr>
<tr>
<td>Griffin Wines</td>
<td>Kuitpo</td>
<td>26.5 ha</td>
<td>No</td>
</tr>
<tr>
<td>Grove Hill</td>
<td>Norton Summit</td>
<td>2.5 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Hahndorf Hill Winery</td>
<td>Hahndorf</td>
<td>4.5 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Heath Wines</td>
<td>Bowden</td>
<td>80.9 ha</td>
<td>No</td>
</tr>
<tr>
<td>Henschke Lenswood</td>
<td>Lenswood</td>
<td>12 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Ilya Vineyards</td>
<td>Kuitpo</td>
<td>8 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Johnston Wines</td>
<td>Oakbank</td>
<td>50 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Kirrihill Wines</td>
<td>Adelaide Hills</td>
<td>N/A</td>
<td>Yes</td>
</tr>
<tr>
<td>Leabrook Estate Wines</td>
<td>Lobethal</td>
<td>2 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Leland Estate</td>
<td>Lenswood</td>
<td>1.5 ha</td>
<td>No</td>
</tr>
<tr>
<td>Llangibby Estate</td>
<td>Echunga</td>
<td>13.8 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Longview Vineyard</td>
<td>Macclesfield</td>
<td>70 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Magpie Springs Vineyard</td>
<td>Hope Forest</td>
<td>15 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Malcolm Creek Vineyard</td>
<td>Kersbrook</td>
<td>2 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Mawson Ridge Wines</td>
<td>Hahndorf</td>
<td>8 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Maximilian’s Adelaide Hills</td>
<td>Verdun</td>
<td>6.5 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Morialta Vineyard</td>
<td>Norton Summit</td>
<td>11 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Mt Lofty Ranges Vineyard</td>
<td>Lenswood</td>
<td>5 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Murdoch Hill</td>
<td>Woodside</td>
<td>21 ha</td>
<td>No</td>
</tr>
<tr>
<td>Mylkappa Wines</td>
<td>Birdwood</td>
<td>25 ha</td>
<td>Yes</td>
</tr>
<tr>
<td>Nepenthe Vineyards</td>
<td>Balhannah</td>
<td>85 ha</td>
<td>No</td>
</tr>
<tr>
<td>Normans/NXG Winery</td>
<td>Clarendon</td>
<td>8 ha</td>
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</tr>
<tr>
<td>Paracombe Premium Wines</td>
<td>Paracombe</td>
<td>13 ha</td>
<td>No</td>
</tr>
</tbody>
</table>
### Food and Special Food Attractions

Producers in the Adelaide Hills have concentrated more on food production rather than value-adding to the food. Adelaide Hills Food (a food producers and users group) has been developed recently to promote the pristine environment of the Adelaide Hills food region. There are a number of special food attractions in the Hills. The produce and products offered are not regionally branded as in the Barossa.

The Adelaide Hills is famous for produce such as strawberries, apples, pears, cherries, potatoes, cheese, salmon, venison and wine grapes. There is a wide variety of fruits, vegetables, cheese, bread, pulses and olives.

There are many establishments in the Adelaide Hills which serve food, coffee and wine. Cafés and restaurants are found in all of the towns within the Adelaide Hills. Visitors can eat and drink at the many hotels, restaurants, and cafés. The best known eateries in the Hills are hotels (due to a strong pub culture), Bridgewater Mill restaurant, and the numerous cafés in Hahndorf and Stirling.

Many of South Australia’s premium food producers can be found in the Adelaide Hills. Some of these are open to the public, e.g. Springs Smoked Seafood and Beerenberg.

#### Birdwood Wine & Cheese Centre, Birdwood

This centre offers tastings and sales of boutique wines and cheeses from most regions of South Australia and sales of gourmet products.

#### Beerenberg Farm, Hahndorf

This famous strawberry farm offers visitors the experience of picking their own strawberries, walking through the rose garden, visiting the farm shop and buying rose petal jam. There is an extensive variety of farm-style jams, pickles, chutneys and sauces which are exported all over the world.

#### Heritage Park, Woodside

This complex is home to Melba’s Chocolate Factory which was established twenty years ago. Visitors are able to wander through five production rooms and watch the traditional range of sweets being made on historic machinery. The old factory complex offers a huge range of products including souvenirs and gift lines for sale. There is also the Mill Shop of Onkaparinga, Woodside Cheesewright, a country café and a leather workshop.

#### Olde Apple Shed, Balhannah

The Olde Apple Shed at Balhannah specialises in apples direct from the orchard. Here visitors can buy apple pies, cakes, slices, crumbles, juice and jelly, as well as fresh rhubarb, pears, honey and more.

#### Springs Smoked Seafoods, Mount Barker

Springs Smoked Seafoods at Mount Barker offers a large range of smoked seafood, including traditionally smoked salmon, prized by gourmets across Australia. The products are also exported.
**Stirling Organic Market, Stirling**
The Organic Market at Stirling features the sale of fresh fruits and vegetables, oils, grains, pulses, cheeses, honey and yoghurt. Visitors are encouraged to come early because the produce sells out very quickly.

**Hahndorf Inn Showcase Store**
This showcase store features regional produce including German-style smallgoods, fruits, cheeses, confectionery, wines and health products.

**Muggleton’s, Hahndorf**
Muggleton’s at Hahndorf is a general store selling traditional home-produced German chutneys and smallgoods.

**Netherhill Strawberry Farm, Kenton Valley**
Another strawberry farm, Netherhill is a 160 year-old working farm. Its farm shop sells strawberries, homemade berry jams, toppings, free range eggs, nuts, honey and strawberry sweets.

**Willabrand Figs of Houghton**
Figs products are produced and value-added for Australian and international sale.

**Udder Delights Cheese Factory, Lobethal**
Udder Delights is a small business that produces goat’s cheese. The delicate flavours and presentation of these cheeses is earning Udder Delights a valuable reputation in Australia, and the produce also has a limited export market. Udder Delights cheese has won numerous national gold awards since 1999.

**Bird in Hand, Woodside**
A place where visitors will find olives and cold pressed extra virgin olive oils.

**Baylies of Strathalbyn**
Baylies of Strathalbyn are speciality producers of gourmet cakes, pralines, fudge, crackers, puddings, pan forte and shortbread.

**Buzz Honey, Nairne**
Buzz Honey offers hand-extracted honey in a range of flavours, and honeycomb.

**Adelaide Hills Country Markets**
The Adelaide Hills Country Markets offer regional produce, value-added produce, arts and crafts and native plants. The Country Markets of the Adelaide Hills are:
- Heart of the Hills Market, Lobethal;
- Battunga Country Growers Market, Macclesfield;
- Adelaide Hills Country Market, Gumeracha;
- Hahndorf Market, Hahndorf;
- Hills Country Market, Littlehampton;
- Littlehampton Country Market, Littlehampton;
- Wistow Country Market, Wistow;
- Mylor Country Market, Mylor;
- Hills Treasure Market, Echunga;
- Hills Produce Market, Uraidla;
- Meadows Country Market, Meadows;
- Macclesfield Country Market, Macclesfield;
- Stirling Market Inc, Stirling; and
- Woodside Market, Woodside.
Restaurants and Cafés in the Adelaide Hills

The Adelaide Hills houses a range of restaurants, wineries and cellar doors (see Table 16).

Table 16: Restaurant and winery numbers in the Adelaide Hills

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wineries/vineyards</td>
<td>57</td>
</tr>
<tr>
<td>Wineries/vineyards with cellar door</td>
<td>16</td>
</tr>
<tr>
<td>Restaurants</td>
<td>17</td>
</tr>
<tr>
<td>Restaurants featuring winery or vineyard</td>
<td>7</td>
</tr>
<tr>
<td>Restaurants featuring functions</td>
<td>5</td>
</tr>
</tbody>
</table>

Source: Wine Diva 2005

Visitor Centres in the Adelaide Hills

The Adelaide Hills region has two visitor information centres – The Adelaide Hills Visitor Information Centre, Hahndorf, and The Mount Lofty Summit Information Centre and Gift Shop. Both centres assist with accommodation reservations.

Visitor Numbers and Activities in the Adelaide Hills

Visitor Profile

Visitor numbers to the Adelaide Hills in 2003 included 849,000 domestic day trips and 97,000 visitors staying 299,000 nights. Of the 97,000 overnight visitors, 61,000 were from within the state, 32,000 from interstate and 5,000 were international.

Nearly 3% of all overnight visits in regional South Australia (excluding Adelaide tourism region) include a stay in the Adelaide Hills and the region accounts for over 2% of all visitor nights in regional South Australia. A high proportion of visits to the region (61%) in 2003 were for the purpose of visiting friends and relatives, while 24% gave holiday/leisure as purpose of visit, 5% business and 11% other purposes.

The Adelaide Hills is predominantly a day tripper market; the characteristics of this market being:

- 76% were Adelaide residents;
- the main purpose of visit was holiday/leisure/relaxation (63%), followed by visiting friends/relatives (32%);
- and the most common activities in descending order were:
  - eating out at restaurants,
  - sightseeing,
  - visiting friends/relatives,
  - pleasure shopping,
  - picnics/barbecues,
  - bushwalking,
  - visiting clubs/pubs/discos,
  - visiting national parks and
  - visiting wildlife parks.

On average, overnight visitors to the region stay 3.1 nights, with internationals staying around five nights, interstate visitors four nights and intrastate 2.5. Domestic same day visitors from home contribute nearly 850,000 additional visits, with the region attracting more same day trips from home than any other region except for Adelaide and Fleurieu Peninsula. Adelaide residents account for a large proportion (76%) of these day trips.

Limited data is available on international visitors to the Adelaide Hills; however the SATC profile of day trip visitors to the region indicates that 27% were from the UK, 22% from Other Europe, and 12% from Germany (SATC 2003a).
Marketing of Adelaide Hills Region

Marketing of the Adelaide Hills takes place directly and indirectly through the South Australian Tourism Commission, Adelaide Hills Council, Adelaide Hills Regional Development and South Australia Great.

Adelaide Hills Tourism (AHT) is an incorporated body that is responsible for specifically marketing the Adelaide Hills as a tourism region. AHT are involved in activities such as the development of strategic advertising campaigns, public relations activities, involvement in consumer and trade shows, the development of consumer and trade collateral and the promotion of festivals and events. This group works closely with the South Australian Tourism Commission, local government and industry to ensure the region is marketed effectively and consistently. The AHT Committee is appointed by the South Australia Minister for Tourism and meets regularly to develop marketing plans.

The South Australian Tourism Commission employs a marketing manager for the Adelaide Hills who is based in the region. They work closely with the committee and the South Australian Tourism Commission to develop and implement marketing campaigns for the region.

Events Held in the Region

_Adequate Hills Harvest Festival_
This festival is held at various venues throughout the Adelaide Hills during February to celebrate the harvest.

_Heysen Festival at Hahndorf_
This annual festival features street entertainment, food and wine in celebration of the influence and accomplishments of the artist, Sir Hans Heysen, in Hahndorf. There are art displays, exhibitions and guided tours of Hahndorf with a focus on cultural heritage.

_Langhorne Creek Vigneron’s Cup, Strathalbyn Racecourse_
This is a day to enjoy Langhorne Creek wines and gourmet food while watching the horse races. This event is held for a day in November.

Regional Development Groups

_Adequate Hills Food_
Adelaide Hills Food is a regional association of artisan food producers, passionate and dynamic, embracing history and innovation and committed to promoting the pristine environment of the Adelaide Hills food region. Sheree Sullivan is the Executive Officer of this network which began in early 1998 and has a growing membership. The food industry is the driving force of this network.

Adelaide Hills Food was established when several local food producers came together for a training program and were given the opportunity to meet with others on a professional and personal level. These meetings continued monthly and a regional food network was eventually established. At present, the Adelaide Hills Food Network meets on a monthly basis to keep members up-to-date with current events and other relevant matters. The opportunity to test a member’s product or contribute ideas to a package design usually presents itself at these meetings.

Adelaide Hills Food mission is to strengthen the brand ‘Adelaide Hills’ in the gourmet world and the wider community. Its vision is to ‘have the Adelaide Hills widely recognised as Australia’s Premier Gourmet Food producing region’ (Adelaide Hills Regional Development 2004).

The current list of 45 members includes producers of beverages, beer, wine, bread, cakes, cheese, chocolate, confectionery, dairy products, fruit and fruit products, native herbs, honey, ice cream, meat, olives and olive oil, pasta, sauces and marinades. Associate members include cafés, pubs, wineries, restaurants, accommodation providers, consultants and retail outlets.

_Adequate Hills Wine Region Group_
The Adelaide Hills Wine Region has some 54 member wineries. They promote their wine at events such as the Bay to Birdwood, Hills on Hutt, Wine Australia in Darling Harbour, Hills Harvest Festival and their own regional wine show. This group is active in sharing knowledge and ideas, lobbying government, and looking after their members. Signage is a major issue for wine tourism in the Adelaide Hills. The Adelaide Hills was only defined separately from Adelaide proper as a tourism destination in 2001 and there are now signs on the freeway that say welcome to the Adelaide Hills; however there is a lack of signage identifying the Adelaide Hills wine region and to date there are very few ‘wine’ signs.
Adelaide Hills Regional Development

Adelaide Hills Regional Development is a joint initiative between Adelaide Hills Council, District Council of Mount Barker and the State Government that aims to facilitate appropriate economic development in the Adelaide Hills region.

The Board includes local business and government representatives. Adelaide Hills Regional Development provides advice and assistance to existing, new and prospective businesses; designs and funds training and employment programs; works at a strategic level with industry sectors and business associations; and plays an active role in regional planning, marketing, infrastructure development, networking and policy formulation (Adelaide Hills Regional Development 2004a).

The Board aims to develop the food, wine and tourism industries in the region, with specific development plans for each industry, funded by the Department of Industry and Trade.

Some initiatives of the wine industry development program include the development of cellar door facilities, wine tourism and food tourism in the region, working together with Adelaide Hills Tourism; the development and promotion of two regional events, namely the Adelaide Hills Wine Show and the Hills Harvest Festival; the development of a regional marketing plan; and the establishment of a liaison with the National Wine Centre to include a permanent Adelaide Hills regional display.

The food industry development plan included initiatives such as the design and implementation of an incorporated structure for the Adelaide Hills Food Producers, and a non-exclusive but quality-oriented membership policy; the development of business, marketing and export plans for all food businesses in the region; the development of a marketing plan comprising of shows and promotions in which the regional food industry will participate; and access to subsidised consultancy services for food producers. In addition to these initiatives and with more funding, the Board has contracted Hudson Howells to develop a food industry plan based on a template that was developed together with Food South Australia, and this has become a model for other food regions.

As part of its plan to develop tourism, the Board provided funds to Adelaide Hills Tourism to promote the region. The Board also conducted several tourism industry workshops to identify priority issues across the region and to decide on courses of action, as well as responsibility for initiatives. The workshops involved representatives of the industry, Adelaide Hills Tourism, the food and wine industries and local government.

Some funds from previous years were used to develop a computerised booking service and to install computer terminals in two visitor information centres, as well as the training of volunteer staff. Further development of the Adelaide Hills Tourism website is also planned (SATC 2004).

Interviews

Interviews were conducted with Sheree Sullivan, Executive Officer, Adelaide Hills Food and Alan Hareth, Mt Lofty Ranges Vineyard.

Sheree Sullivan, Executive Officer, Adelaide Hills Food, Lobethal.

Sheree is the Executive Officer of Adelaide Hills Food. The group started five years ago as a result of a regional development training grant. The six original members continued to meet after the training to stop ‘the feeling of being this lonesome little fish in a big pond’. Two of the founding members (Udder Delights and Foods from the Edge) are still involved today and both are on the executive committee. In 2002, there were 14 members, and today there are 40 members. It is an incorporated body, with a strategic plan, a bookkeeper, an executive of six, and a laptop ‘office’ which works in a ‘self-sustainable way’. Membership costs $200 a year and this is the only charge. Their vision is to see the Adelaide Hills recognised as one of the top five food and wine producing regions in Australia. As Sheree said:

If I said to someone, name me some top food and wine regions, everyone knows wine, they don’t always know the food and wine, and from my perception I say Yarra Valley, Barossa Valley and Margaret River. We want to be named up there, Adelaide Hills, just like that. So that’s the aim, our mission.

Sheree also emphasised the importance of being a food and wine region, not just food – ‘you’ve got to give them the whole experience’.

The Adelaide Hills region is a geographically stretched area, with membership of the group coming from Williamstown to Strathalbyn. This is in contrast to the Barossa Valley, which is compact and clearly definable. Geographically, the region is well-situated in terms of access to markets – airport and freight companies are 30 minutes away.

In the Adelaide Hills region there are many products and activities, but nothing iconic. Sheree suggested that the Adelaide Hills needs mystery, by perhaps calling itself ‘The Hills’, which does not make the direct connection with Adelaide.
Adelaide Hills Food works closely with a number of individuals and groups in the Hills, for example the Food Industry Development Officer from Food South Australia, the Adelaide Hills Wine Region Group and the Tourism Group. The chairs of the food, wine and tourism groups meet to discuss where they can work together more. Currently they work together when events are being organised.

Sheree went to the Yarra Valley in Victoria about a year ago, and came back ‘finally understand the food culture’. She found it very easy to buy, eat and know that she was eating local produce. Adelaide Hills Food now has restaurant members who have agreed to offer some menu items with 75% local produce. This is identified by a ‘Taste the Adelaide Hills’ sign on their shop, and on the menu they identify it as a ‘Taste the Adelaide Hills item’.

In late 2004, they launched the Produce Trail, enabling people to purchase local produce in the Adelaide Hills, particularly from the people who make it. They worked closely with Adelaide Hills Tourism Marketing and made the brochure look very similar to the South Australian Tourism Commission Secrets Guide (HWR Media & Communications 2002).

Adelaide Hills Food aims to become a peak network body for food in the Hills and to attract new members with tangible benefits. Members targeted are restaurants, food service providers and primary producers. Members are very flexible and innovative and not stuck in their ways, so many good ideas have come from them. An example of this is Friends of Adelaide Hills Food, which anyone can join for $33 a year. Friends can obtain discounted electricity, product discounts, invitations to functions organised by Adelaide Hills Food and special ‘friends only’ openings of member businesses where they can access produce directly from the maker:

So it brings people to the Hills, they become committed to the area, to the experience, and can relate to the product. They have a story about it and then they buy it at a reduced rate compared to what they would in the shops.

They aim to have 200 friends by the end of the 2004-05 financial year and 500 the following year.

They use contacts in the media to promote the region and to be the advocates for the region. For example, Leo Schofield from Gourmet Traveller came to the Adelaide Hills to do an editorial piece for the magazine.

Partnerships are being developed with other businesses to provide outlets for Adelaide Hills Food, using those member businesses with more experience to mentor the less experienced members. The food group provide various training opportunities to their members, such as financial management and occupational health and safety. Unlike Food Barossa, they are happy for the regulators within the food industry to monitor their members; ‘we’re not interested in auditing, that’s what council does’. Members can either be ‘entry members’ or ‘certified members’, meaning that anyone joining has to fulfil all minimum requirements in their industry, and if they meet those requirements Adelaide Hills Food will certify them; entry members are start up businesses that have access to training and discounts.

Adelaide Hills Food work closely with the Adelaide Hills wine group and tourism association, meeting regularly to discuss where they can work together more.

Adelaide Hills is very different from other food and wine regions in that its history is not wine, it’s fruit production and food; ‘I looked through our members and 75% of them are using fruit… most of our value-added products are fruit or you serve them with fruit’.

Food producers in the Adelaide Hills are very close to their market in Adelaide, which is to the benefit of producers; however, as a result producers are not interested in community activities such as farmers markets, ‘they are more interested in one-off events rather than ongoing commitment’.

**Alan Hareth, Mt Lofty Ranges Vineyard, Lenswood**

Alan, with his partner Jan Reed, is the owner manager of Mt Lofty Ranges Vineyard at Lenswood in the Adelaide Hills and a member of the Adelaide Hills Wine Region Group.

Alan discussed a number of barriers and impediments to the growth of wine tourism in the Adelaide Hills. Firstly, Alan outlined the difficulties the region has encountered in getting common wine trail signage erected throughout the region. The signage with the bunch of grapes to indicate ‘wine region’ has been adopted in areas of Victoria, Coonawarra and Margaret River. However in the Adelaide Hills not only has funding been an barrier (estimated cost of such signage in the region is $25,000) but also the geographic spread of the Adelaide Hills, not being as well-defined as regions such as the Riverland and McLaren Vale.

The Adelaide Hills was only geographically defined as a tourism destination separate from Adelaide proper in 2001. This could be a contributing factor when considering the results of research conducted for the Adelaide Hills wine group that indicated only 10% of people surveyed in bottle shops knew that the Adelaide Hills was a defined wine region. The Adelaide Hills Wine Region Group has recently employed someone to work on a branding exercise for the Adelaide Hills.

The Mt Lofty Ranges Vineyard opened its cellar door in 1998 and has struggled to get trade to the cellar door; they are now getting repeat business, very specific traffic to the cellar door with no pattern of visitation as some weekends are busy and others not at all. Alan believed any growth in business was the result of word-of-mouth. The research conducted on behalf of the Adelaide Hills Wine Region Group indicates 70% of visitors come to the Adelaide Hills for the scenery and Alan’s vineyard is well-situated for scenic beauty, so promotional
material needs to communicate this. However, an impediment to the growth of the business, despite the advantage of scenic location, is the lack of other tourism attractions/businesses in the surrounding area. Alan commented, ‘There’s not much food stuff around here, we’ve got the local deli down in the village which is closed on Sunday afternoon I suppose’. To their advantage, the wine group research indicates that:

A lot of people that come to the Hills for the picturesque nature, like the non-commercial nature of the Hills and like the variability of venues like ours... as distinct from the bigger ones.

This is a dilemma however, as the small, rustic nature of the ‘Tasting Shed’ attracts some people but others ‘don’t want to come in to a cellar door if they don’t see other people’.

Alan reported that of the 700,000 visitors to the region, only a small portion come to cellar doors and there is a belief among the wine group that the Adelaide Hills region need ‘to do better with the food given our long food history compared with the Barossa’. Similarly, recognition for the quality of grapes grown in the region is an issue, as the region has 60 wine producers and 24 cellar doors listed in the Adelaide Hills Wine Region guide. However, ‘the majority of grapes that grow in the Adelaide Hills goes out of the region and ends up in bottles that don’t have an Adelaide Hills label on them... how do we get more recognition and get labelled as coming from the region in the end product?’

The final issue Alan raised was the restriction on approvals for additional cellar doors and wineries in the Adelaide Hills. State government regulations prevent the establishment of cellar doors outside township boundaries because they are ‘classified effectively as a shop and you’re not allowed to have a shop outside a township boundary’. Wineries are frowned upon because of pollution-related issues, and for this reason there has been a limit of 10 wineries in the Hills which has prevented a number of people interested in building wineries in the Hills from doing so. Alan commented on the dilemma that ‘the state on the one hand was trying to promote wine tourism and yet you had this development that was prohibited and you couldn’t have a cellar door’. A number of ongoing consultation processes with the state and local government authorities are underway that aim to amend planning to enable more cellar door operations in the Hills and remove such restrictive regulations.

**Key Themes Emerging**

There are four key themes that came from this investigation into the Adelaide Hills –barriers, collaboration, developing brands and tourism vs. mass production.

**Collaboration**

The more recent development of the Adelaide Hills Wine Region Group and Adelaide Hills Food has started the process of collaboration among industry members; however, collaboration between groups is in need of development, as one winery operator suggested:

There was always tension between, in the past, as to whether this was going to be a food event or a wine event and the wine people had to get back in their box if the foodies were running it ... so it wasn’t an integrated thing in the past and I think we’re still getting toward that, we still haven’t got there as a region.

It would appear that improvements are being made, as Sheree Sullivan stated, coming from the food perspective ‘we work really closely... the Adelaide Hills Food... the wine group and the marketing manager of tourism here in the Hills and we often meet’. These two contrary statements suggest that, perhaps due to the geographical dispersion or the lack of inclusion of the various stakeholders in these meetings, not all stakeholders feel there is a collaborative network working towards a common goal. There is also the restriction faced by small business operators that they have to attend to their individual business needs and be at the cellar door, rather than participating in community meetings and events.

**Developing Brands**

Adelaide Hills Food has recognised the importance of building the Adelaide Hills brand, as evidenced by such initiatives as the Taste the Adelaide Hills and the Produce Trail, as well as the Friends of Adelaide Hills, all working to get the Adelaide Hills brand ‘recognised as one of the top five food and wine producing regions in Australia’. In addition to this, fruit from the Adelaide Hills is now being branded according to the sub region it is grown in.

The Adelaide Hills Wine Region Group has discussed the issue of getting recognition for the quality of grape coming from the Adelaide Hills but not being labelled as Adelaide Hills as it is produced outside the region. Initiatives such as a bimonthly meeting of cellar door operators to exchange brochures to keep informed about their surrounding businesses will achieve minimal brand-building, as it will only be communicated to tourists already in the region. However, the marketing manager recently appointed by the wine group to help brand the region may lead to brand-building initiatives within the wine group.
Barriers
A number of barriers were mentioned among both food and wine industry operators. Within the food industry, the different focus of the primary producers has resulted in a lack of interest in any ongoing regional events, such as the local farmers markets of the Yarra Valley and the Barossa that have helped the growth of tourism in those regions.

The wine industry suffers in a similar manner, with a large percentage of grapes being sold to winemakers in other regions. Other barriers hindering tourism development within the wine industry were the lack of signage, the lack of clusters of tourism-related businesses within close proximity to wineries, the large geographic dispersion and lack of defined boundaries, and the restriction placed on new cellar doors being established in the region.

Tourism vs. Mass Production
It has been noted that many of the food producers in the Adelaide Hills are not interested in getting involved in tourism-related events, as they have a well-established market within close proximity in the city of Adelaide or shipped off to the nearby airport or freight terminal. Many of the grape growers are in a similar position, having markets for their grapes outside the Adelaide Hills region and the hindrance of government regulations making the establishment of wineries and cellar doors in the Adelaide Hills unattractive to newcomers.

Recommendations
The Barossa presents a case study of a region that has a well-established wine industry, a well-developed wine tourism industry and a developing food tourism industry. Strategic collaborative planning is evident among the wine, food and tourism industry stakeholders. Key regional champions and leaders were identified within the wine industry. Leadership and collaboration have been evident throughout the history of the region, in particular since the 1970s. The food of the Barossa is now finding a place in the national and international marketplace, and within the region the farmers markets, restaurants, cafés and farm gate outlets are drawing tourists to the region. It is therefore recommended that in the Barossa Valley:

- As tourism numbers increase the sustainability of what is authentic to the region may become an issue. The sustainability of the Barossa must remain at the forefront of any decision making – be it use of irrigation, amount of wine produced, number of hectares under vine, diversity of agriculture, size of population, development of urban infill, numbers of tourists etc. Strategic planning will be essential to allow optimum development of the region while maintaining the sustainability of the region.
- The uniqueness, authenticity, cultural and historical background of the Barossa Valley be nurtured and developed as an integral part of the tourist experience. This would not only add to the authenticity of the tourism experience, but allow the history and culture of the region to be kept alive and passed on to future generations.
- Courses be developed for the local TAFE that will enable the next generation to take over the production of foods that are authentic to the region, in particular butchery, smallgoods and baking.
- The staging of festivals and events continue and be developed strategically so the appeal of the Barossa Valley and its products is enhanced and the community and its volunteers are included in the planning of such events to ensure community ownership and acceptance.
- There be integration of the activities, scenery, heritage and accommodation into a better tourism package, with more information about food products and dishes and the appropriate matching of food with wines.

The Adelaide Hills region, in contrast to the Barossa Valley, is an emerging food and wine tourism region. Regional branding is currently a focus issue among wine industry stakeholders; however this branding process cannot be done in isolation from other stakeholders, especially Adelaide Hills Food and the tourism association. The development of tourism in the region requires strategic, collaborative planning with the involvement of all stakeholders. While there is evidence of some collaborative planning in the Adelaide Hills, further development and encouragement is required. It would seem that many of the region’s producers have not acknowledged a desire to increase tourism numbers to the region specifically to explore the food and wine product. Increasing consumer awareness of the Adelaide Hills product will require the collaborative involvement of the region’s stakeholders and a commitment by these stakeholders to become involved in this process, including the staging of events that profile the region’s wine and food produce.

The geographic dispersal of this region would appear to be a hindrance to not only the implementation of a signage system for the wineries but also to the collaborative processes that are required. It is therefore recommended:

- That the Adelaide Hills Food Group encourages application for more business membership. Their most recent initiative, Taste the Adelaide Hills, and the Produce Trail are to be encouraged, and should be
promoted among the region’s stakeholders to increase membership and ownership of such initiatives and encourage the development of further innovative initiatives.

- That Adelaide Hills Food work closely with the Adelaide Hills Wine Region Group in the branding of the region to ensure that both food and wine are highlighted.
- That food outlets promoting the region’s produce be established in clustered areas that will complement the wine tourism product of the region.
- That regional champions and leaders are encouraged to enable the growth of tourism in the region and build awareness of the region’s wine and food product.
- The region’s wine industry stakeholders need to work with state and local government to ensure that development of wine tourism is achieved, ensuring not only the sustainability of the region as a whole but the ongoing success of the Adelaide Hills wine product by enabling more cellar doors to be established in the region.
- That promotional material for the region’s cellar doors should clearly articulate opening times, product offerings, directions and/or maps, and aspects of the tourist experience which would encourage tourists to visit.
- Given the wide geographic dispersion of the Adelaide Hills region, the issue of signage for the region’s wineries needs to be addressed with state and local government bodies. It would seem that this will be a costly exercise, however the necessity of such signage needs to be emphasised to those government bodies to establish funding and the commencement of this project.
- That the councils be further encouraged to show support of the food and wine activities. This presents a dilemma in that sometimes heritage, sustainability, water shed, water quality and conservation and the law can be in conflict, and can also be in conflict with food and wine production in the area.

Conclusion

Although the Barossa and Adelaide Hills are neighbours, a number of key differences have been highlighted in this study. The Barossa Valley is a much more clearly defined region than the Adelaide Hills and is more mature in terms of continuous wine production, with the wine industry continuing to grow and develop. The Adelaide Hills is an emerging wine and food tourism region, as the re-emergence of wineries in the region has been comparatively recent (since 1971) and is not strongly branded as a food and wine region. Visitors to the Barossa are older, travel with a partner, and are usually from interstate, whereas those visiting the Adelaide Hills stay with friends and relatives and are likely to be on a day trip and visit parks and gardens. The Adelaide Hills is in close to proximity to Adelaide and does not actively promote the region specifically as a wine tourism destination. That is, there is no sense of journey and winery visits may be incidental to other activities (SATC 2000a).

The Barossa has a greater number of food outlets, however they are not clustered with other tourist attractions or wineries to create geographically clustered tourism areas. In the Barossa, the development of restaurants, cafés and accommodation has been slower but it is rapidly increasing, as is the quality. One of the features of many Barossa eating establishments is the emphasis on the use of food and produce sourced from the region, and in some restaurants menu items highlight the culture and history of the region. This is perhaps one of the major points of differentiation for the Barossa – its strong German heritage and sense of community which brings together many of the Barossa’s attractions, activities, events and produce, and draws visitors to the region.

Both regions have a food producers group, however Food Barossa is more advanced in their development and have an innovative plan for building the brand nationally and internationally while maintaining the quality of the product. The latter point is evident in the quality assurance that is an integral part of the development of Food Barossa. Food Barossa is now assisting other regions with their development of food produce.

The Barossa has one strongly supported farmers market, while the Adelaide Hills has many small markets that are held in widely dispersed towns. The Barossa is developing its wine and food tourism product in a cohesive, collaborative way, whereas the Adelaide Hills faces the challenge of bringing together a number of different towns and their producers and working on developing tourism in the region in a collaborative manner.

The importance of leaders for the region, whether it is for wine, food or tourism, is highlighted, and a number of regional champions were identified in the Barossa. The researchers spoke with individuals who are passionate about the region and product, dedicated to promoting the product, visionary, energetic, and giving time voluntarily to this cause. These champions/entrepreneurial leaders are active in the local and national media. The Barossa has very strong advocates for regional food; this is not as evident in the Adelaide Hills. In both regions the development of produce within the region is viewed as paramount, the need for the link with nature and the need for quality assurance in some form are also seen as important.

The educational component of the visitor experience is apparent at cellar doors when wine tastings are conducted. An excellent example of this is the relatively new Shaw and Smith Winery in the Adelaide Hills,
which has been specifically designed as a sustainable winery environment, with a dedicated area for structured wine tastings and education.

In terms of their settlement and development, the two regions do share some commonalities; for example, Europeans settled both regions in the 1840s and there is a strong German Silesian cultural heritage in the Barossa and in Hahndorf, a popular tourist town in the Adelaide Hills. Other common themes include the product, either food or wine where authenticity and uniqueness of the product is important. Also, each region considers the outside customer as important – the concept of the visitor or guest rather than the tourist or customer is strong. To enrich the experience and achieve customer satisfaction is important. There is a special identity belonging to each region and people in the regions are trying to define the strengths and uniqueness of their region.

Landscape and signage play an important role in the identity of a region. The Barossa can be viewed as a region – as visitors drive into the region there is signage to identify the boundaries and they can see the physical area stretching out before them. In contrast to this, the Adelaide Hills has few signs to identify the boundaries and the hilly, rolling landscape makes it difficult to physically see the expanse of the region; the visitor needs to travel into the small towns and over the next hill to discover the wineries and cafés. As a result there is more mystique and more challenge in visiting the Adelaide Hills and a more recognised, cohesive identity in the Barossa.

In conclusion, the major factors that have made these two regions successful as food and wine regions are firstly, that they have a date been maintained. Secondly, tourism is accepted and integrated into the development of the region. Thirdly, the quality, diversity and distinctiveness of products is considered very important. The importance of regional champions and entrepreneurs to the development of food and wine tourism is once again highlighted in these regions. Finally, regional groups have recognised the value of collaboration versus competition.
Chapter 3

VICTORIA: YARRA VALLEY AND MACEDON RANGES

Introduction

There are a number of food and wine tourism regions to be found among Victoria’s twenty-two winegrowing regions including the Yarra Valley, Gippsland, Macedon Ranges, Goulburn Valley, Rutherglen, King Valley, Murray Valley and Grampians. In total, Victoria has over 350 wineries and many local food producers (Tourism Victoria 2002), making the state a huge attraction to local and international visitors alike. In 2002, there was an estimated 3.2 million visitors to Victoria’s wineries (Tourism Victoria 2002). The Yarra Valley has over 90 wineries, 80 of which are open for cell door sales, and the Macedon Ranges region is home to more than 40 wineries (Wine Australia 2004).

The Yarra Valley

The Yarra Valley is just under one hour’s drive from central Melbourne and is famous for its world-class wines, local produce and beautiful countryside. The wineries of the Yarra Valley range in size from small and boutique owner-operated vineyards to larger national and international wine companies. The wine region was established in the early 1800s when the first vine cuttings were planted at Yering Station, Victoria’s oldest vineyard. Today, together with the Yarra Valley’s thriving vineyards, many cafés and restaurants feature throughout the region and offer a range of local culinary experiences. The Yarra Valley has a reputation for fine quality regional produce that is being utilised in many of the region’s restaurants. Many of the local food producers sell their products through cell door outlets, farmers markets and specialty food stores in the region.

Characteristics of the Yarra Valley Region

Yarra Ranges Shire has an estimated residential population of 143,636 (June 2003) (Yarra Ranges Shire Council 2004). The Yarra Ranges Shire encompasses an area of 2,500 square kilometres and is the largest shire of any metropolitan or city fringe council in Victoria. Each year, over three million tourists visit the wineries of the Yarra Valley, along with major attractions such as Healesville Sanctuary, Puffing Billy and the region’s parks and gardens (Yarra Ranges Shire Council 2004). To accommodate the large number of tourists, the Yarra Valley has a wide range of accommodation available, from bed and breakfast operations to hotels, motels, caravan parks, camping grounds and farm stays. Map 7 shows the location of the Yarra Valley region, with the majority of major vineyards highlighted.
Map 7: Yarra Valley

Source: Visit Victoria 2004a
Accommodation in the Yarra Valley

The Yarra Valley, Dandenongs and The Ranges have a total of 52 accommodation operations. Table 17 provides a breakdown of the different accommodation segments. According to Tourism Victoria’s accommodation summary for the December quarter 2003, the occupancy rate for the Yarra Valley, Dandenongs and The Ranges was 35.3%.

Table 17: Accommodation in the Yarra Valley

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfasts</td>
<td>18</td>
</tr>
<tr>
<td>Lodge</td>
<td>3</td>
</tr>
<tr>
<td>Cottages</td>
<td>26</td>
</tr>
<tr>
<td>Caravan Parks</td>
<td>2</td>
</tr>
<tr>
<td>Units</td>
<td>2</td>
</tr>
<tr>
<td>Hotels / Motels</td>
<td>-</td>
</tr>
<tr>
<td>Retreat</td>
<td>1</td>
</tr>
<tr>
<td>Resorts</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>52</td>
</tr>
</tbody>
</table>

Wineries in the Yarra Valley

Wineries constitute the dominant tourist offering in the Yarra Valley. There are over 90 vineyards that cover more than 2500 hectares and over 80 of the wineries offer cellar door facilities. The wineries of the Yarra Valley operate first and foremost as wine producing enterprises, but very strong emphasis is also placed on the tourism sector for these wineries. Cellar door opening hours are varied, with most open seven days a week, although a few of the vineyards only open at weekends, mainly due to their smaller size and subsequent limitations on availability of staff. The winery operations vary in size from small owner-operated to large national and international companies. The larger wineries generally have a lot to offer, including extensive cellar door facilities, restaurants, cafés and accommodation. Generally, the smaller sized wineries offer only a café and/or cellar door. Many of the cellar doors serve light lunches and sell products other than wine, for example Yarra Valley Dairy products, Yarra Valley Regional Food Group products including jams, relishes, chutneys, winery logo t-shirts, caps and aprons. Table 18 provides a list of wineries in the Yarra Valley (for which information is available), indicating location, size of vineyard if available, location and whether the vineyard operates a cellar door. Wineries not listed in the table are generally small operations with very limited information available about them.

Table 18: Wineries in the Yarra Valley

<table>
<thead>
<tr>
<th>Name</th>
<th>Cellar Door</th>
<th>Established</th>
<th>Location</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ainsworth Estate</td>
<td>Yes</td>
<td>N/A</td>
<td>Seville</td>
<td>N/A</td>
</tr>
<tr>
<td>Arthurs Creek Estate</td>
<td>No</td>
<td>1983</td>
<td>Arthurs Creek</td>
<td>8 ha</td>
</tr>
<tr>
<td>Bianchet Winery</td>
<td>Yes</td>
<td>1976</td>
<td>Lilydale</td>
<td>N/A</td>
</tr>
<tr>
<td>Coldstream Hills</td>
<td>Yes</td>
<td>1985</td>
<td>Coldstream</td>
<td>20 ha</td>
</tr>
<tr>
<td>De Bortoli Winery &amp; Restaurant</td>
<td>Yes</td>
<td>1928</td>
<td>Dixons Creek</td>
<td>163 ha</td>
</tr>
<tr>
<td>Domaine Chandon Australia</td>
<td>Yes</td>
<td>1985</td>
<td>Coldstream</td>
<td>73 ha</td>
</tr>
<tr>
<td>Dominique Portet Winery</td>
<td>Yes</td>
<td>2000</td>
<td>Coldstream</td>
<td>N/A</td>
</tr>
<tr>
<td>Elmswood Estate</td>
<td>Yes</td>
<td>1999</td>
<td>Wandin East</td>
<td>4 ha</td>
</tr>
<tr>
<td>Evelyn Country Estate</td>
<td>Yes</td>
<td>1995</td>
<td>Kangaroo Ground</td>
<td>8 ha</td>
</tr>
<tr>
<td>Eyton on Yarra</td>
<td>Yes</td>
<td>1993</td>
<td>Coldstream</td>
<td>N/A</td>
</tr>
</tbody>
</table>
**Special Food Attractions in the Yarra Valley**

The Yarra Valley is considered to have a cool climate, which is ideal for growth of the major grape varieties produced, including Pinot Noir, Chardonnay and Cabernet Sauvignon. Cool climate fruit and vegetable produce also grows well and many local producers supply the region’s restaurants with quality produce as well as exporting their products to other states in Australia. Farmers markets within the region, such as the one held every month at Yering Station, are growing in popularity as places to purchase quality local produce. In addition, within the Yarra Valley region there is a growing emphasis on organic and chemical-free fruit and vegetable production.
Yarra Valley Dairy – Cheese
Yarra Valley Dairy incorporates a restaurant in an old dairy building. The dairy produces more than 20 varieties of handmade cheeses including French and Italian styles, with the most popular style being the marinated Persian Fetta. Milk for cheese making comes from Friesian cows that graze in the Yarra Valley Dairy pastures and from goats that graze in the hills and are hand milked. Visitors to the historic Yarra Valley Dairy can experience the pastoral scenery that surrounds the dairy while sampling the handmade cheeses and regional wines.

The Yarra Valley Pasta Shop – Pasta
Pasta is freshly prepared every day utilising free-range eggs. Pasta is served with freshly prepared ‘home-style’ sauces. A range of regional and imported produce is available, together with coffee and ‘treats’ such as gourmet cakes, tarts and biscuits.

Kinglake Raspberries – Raspberries
Kinglake Raspberries is a 25 hectare raspberry farm located in the foothills of the Great Dividing Range north-east of Melbourne. With over 36,000 metres of raspberry rows, the farm is one of the biggest berry farms in Australia. Products from the farm include jams, sauces, cordial, vinegar and fresh and frozen raspberries. When the raspberries are in season, Kinglake Raspberries operates a ‘pick your own’ service, while during the winter months raspberries are available frozen.

Warratina Lavender Farm – Lavender
Warratina Lavender Farm is operated by the Manders family. The farm offers views of the distant hills and visitors can walk along the lavender rows to experience the countryside. The Manders family produces a range of products from the lavender including chamomile and lavender tea, lavender mustard, lavender honey, lavender vinegar and lavender confectionery. These products are for sale, together with a range of lavender plants, at the farm cottage.

Chateau Yering
Chateau Yering is the site where the first vine cuttings were planted in Victoria. The first vintage was produced in 1845. Today the historical ‘Chateau’ operates as a Country House Hotel. Within the hotel are Streetwater Café and Bar and Eleonore’s Restaurant. The latter is housed in a section of the chateau’s original dining room. Both the café and restaurant offer dishes that incorporate local produce. Meals are complemented by Yarra Valley wines from the chateau’s own cellar. Both the café and restaurant offer food freshly cooked onsite by the hotel’s team of chefs.

Restaurants and Cafés in the Yarra Valley
‘Long lunches’ have become an established tradition in the Yarra Valley, particularly at the restaurants of the De Bortoli and Yering Station wineries. These ‘long lunches’ feature fresh seasonal food prepared on the premises, served with regional wines with views of the surrounding vineyards. Picnic lunches may also be assembled from regional produce, including smoked fish and caviar, handmade cheese and pasta, seasonal fruits, organic salads and chocolates from producers along the Yarra Valley Regional Food Trail (Tourism Victoria 2002). According to Wine Diva and Tourism Victoria, there are 22 restaurants in the Yarra Valley (see Table 19). These eating establishments range from cafés to fine dining, maintaining the theme of fresh and local produce throughout. In addition, there are many cellar doors that are not classified as restaurants which serve light snacks.

<table>
<thead>
<tr>
<th>Location</th>
<th>Number of Cafés and Restaurants</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dixon Creek</td>
<td>2</td>
</tr>
<tr>
<td>Kangaroo Ground</td>
<td>2</td>
</tr>
<tr>
<td>Seville</td>
<td>2</td>
</tr>
<tr>
<td>Coldstream</td>
<td>3</td>
</tr>
<tr>
<td>Yarra Glen</td>
<td>2</td>
</tr>
<tr>
<td>Yering</td>
<td>4</td>
</tr>
</tbody>
</table>
Visitor Centres in the Yarra Valley
Within the region of the Yarra Valley, Dandenongs and the Ranges, there are three visitor information centres, located at Marysville, Healesville and Upper Ferntree Gully. They are operated by volunteers and are open from 9am to 5pm every day, providing a free accommodation booking service along with detailed information on various local attractions within each area.

Visitor Numbers and Activities in the Yarra Valley

Visitor Numbers
The largest proportion of visitors to the Yarra Valley is from the domestic market (see Table 20). For the year ending December 2003, there was a recorded 520,000 domestic visitors to the Yarra Valley, the Dandenongs and The Ranges. In addition there was also a recorded 22,000 international visitors to the region (Tourism Victoria 2004). The total number of day trip visitors to the region was 2,305,000, with the December quarter 2003 contributing to takings of $3,965,000 by accommodation establishments as outlined in Table 20. For the year ending 2004, the major state markets for Victoria in regards to overnight visitors were 71% Intrastate (Victoria), 15% New South Wales, 5% South Australia, 4.5% Queensland and the remainder of visitors originating from Western Australia, Tasmania, Australian Capital Territory and Northern Territory (Tourism Victoria 2005).

Table 20: Visitor numbers to Yarra Valley, Dandenongs and The Ranges

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Domestic Day Trip Visitor Numbers</th>
<th>Year</th>
<th>Total International Visitor Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>2,968,000</td>
<td>2000</td>
<td>16,000</td>
</tr>
<tr>
<td>2001</td>
<td>2,431,000</td>
<td>2001</td>
<td>16,000</td>
</tr>
<tr>
<td>2002</td>
<td>2,625,000</td>
<td>2002</td>
<td>11,000</td>
</tr>
<tr>
<td>2003</td>
<td>2,305,000</td>
<td>2003</td>
<td>22,000</td>
</tr>
</tbody>
</table>

Source: Tourism Victoria 2004

Purpose of Trip
The most common purpose of a trip to Victoria in 2001 was for a holiday (46%), with other major sectors including visiting friends and relatives (33%) and for business or to attend a conference (17%).

Marketing of the Yarra Valley Region
Tourism Victoria is responsible for the marketing of the Yarra Valley, although the recently introduced Yarra Brand group is also responsible for the marketing of the Yarra Valley. The Yarra Valley, together with the Dandenongs and The Ranges, make up the marketing region. Tourism Victoria has developed a regional partnership program (RPP), which is a state government funded program to facilitate more effective, strategic and integrated marketing of regional Victoria, in partnership with industry.

The RPP has been set up to complement Tourism Victoria’s national and international marketing programs, by supporting the development of high quality, consumer driven campaigns. It works to facilitate industry participation and cooperation, and helps increase industry professionalism and standards.
Tourism Victoria has recognised that regional tourism can make a significant contribution economically, socially and environmentally to Victorians, by complementing the traditional agricultural and resource-based industries, providing more attractions, activities and benefits for visitors. In this way Victoria can target a broader range of markets, promote longer stays and encourage greater visitor expenditure.

Tourism Victoria recently launched a very successful advertising campaign about the Yarra Valley throughout the east coast of Australia over the period of April and May 2004. The campaign was known as ‘Run Rabbit Run’ and the region was promoted as a stylish food and wine destination. Since the advertising there has been a 78% increase in the number of visitors from New South Wales alone (Department of Premier and Cabinet 2004).

Food and Wine Regional Development Groups in the Yarra Valley

As outlined earlier, there are over 20 restaurants in the Yarra Valley and within the region there is also a very active food group – the Yarra Valley Regional Food Group.

Yarra Valley Regional Food Group

The Yarra Valley Regional Food Group was established in April 1998 by food-based businesses in the Yarra Valley Region. It was established to promote and encourage continuity as well as purity and freshness of food products. The main focus of the Yarra Valley Food Group is to:

- ‘Identify small and large specialist growers and producers;
- Involve all levels of food, wine and hospitality businesses in the region;
- Encourage purity and freshness in food products in the region; and
- Promote and publicise primary production in the area.’ (Aumann Family Orchard 2004)

There are over 100 Yarra Valley Food Group Members who provide a range of products including jams and chutneys for the produce store at the old winery building at Yering Station. Products sold include ‘old fashioned’ lemon cordial, lavender honey and mustards, bottled natural spring water, trout products and Yarra Valley ice cream. The organisation is self-funded, charging an annual membership fee of $275. Tourism Victoria provided initial funding for the group, together with some funding from the local shire intended for development purposes such as training.

Yarra Valley Farmers Market

The first farmers market in the Yarra Valley opened at Yering Station in 1998. It was an outstanding success and led to quarterly markets in 1999. More recently, following customer encouragement and increasing demand, the Yering Station Farmers Market is now held on the third Sunday of each month. These farmers’ markets provide visitors with opportunities to meet growers and purchase fresh local produce.

Yarra Valley Winegrowers Association

The Yarra Valley Winegrowers association first formed in 1889 and has 12 members. It receives funding from the local council to assist with marketing the Yarra Valley wines. There is also a levy of $1000 per member which contributes to marketing. The objectives of this association include the establishment of a successful wine tourism industry for the Yarra Valley and raising the profile of the region by successfully marketing and promoting the Yarra Valley wineries as a cohesive group. In conjunction with this group is the Yarra Valley Wine Network, which again works to link the various wineries together.

Interviews

Interviews were held with key personnel in the Yarra Valley: Margaret Baker, coordinator of the Healesville Visitor Information Centre; Suzanne Halliday of the Yarra Valley Regional Food Group; Denis Craig of the Ainsworth Estate Winery and President of the Yarra Valley Tourism Association; and Michael Matthews, former General Manager of Tarrawarra Winery and, among other positions, Chairman of the Victorian Winery Industry Association. While most of the positions in these associations are voluntary ones, the role of coordinator of the visitor information centre is a paid position.

Healesville Visitor Information Centre

Margaret Baker, the coordinator of the Healesville Visitor Information Centre was interviewed to obtain her thoughts on the way the centre assisted in enhancing tourism in the region. The visitor information centre at Healesville was established some nine years ago at the instigation of the Yarra Valley Tourism Association. Originally located in a small hut for two years, the centre was run purely by volunteers, whereas now the Centre employs four staff and operates as a Level Two Visitor Information Centre. The Yarra Valley Tourism
Association now has between 180 and 200 members who pay a registration fee that assists in funding the centre. New members join each week to obtain the benefits of the centre’s promotional role. Other funding comes from the 10% commission charged to visitors as an accommodation booking fee. This can be very profitable when there are large events occurring in the region.

One of the key issues for the centre is the lack of accommodation available for the range of visitors that come to the area. There are over 50 accommodation properties within the region (including Warburton, Dandenong Ranges and Yarra Glen); however, there is little budget accommodation for those who wish to spend longer in the region but not necessarily more money. Margaret Baker suggested that an up-market motel would enhance the accommodation problems and, given the active role the wineries play in attracting visitors to the regions through their restaurants and events, the region needs a greater number of diverse types of accommodation. The Centre often has great difficulty placing visitors in suitable accommodation.

Yarra Valley Regional Food Group
The Yarra Valley Regional Food Group was established by Suzanne Halliday after she and her husband sold their winery, Coldstream Hills. The group members include a number of small businesses which operate in the area, and there are some associate members who pay a lower annual fee and do not attend meetings. Members of the group must sell local produce or use it in their products. The group runs monthly meetings which are comprised of a committee meeting followed by a general meeting. All fully paid up members are entitled to attend. The annual fee is $275 and the group is self-funding. There has been no increase in membership fee since the start of the group in 1998.

The Yarra Valley Regional Food Group works through a cooperative approach with members working together. Workshops are offered, for example, for the development of creativity, business plans and business strategies, and Suzanne Halliday advises people who wish to move to the region for the establishment of, for example, retirement enterprises.

The Yarra Valley Regional Food Group has introduced a new concept called the ‘discover the taste of a Yarra Valley platter’. To be included in the list on the brochure, the food operation must have the platter on the menu always and it must be made with local produce. In addition to this innovation, links have been established between various local attractions and the provision of food. For example, a new trail in Warburton for walking, horses and cycling has attracted thousands of people at weekends and, as a consequence, two new food providers have opened opposite the entrance to the new trail.

Yarra Valley Tourism Association
The Yarra Valley Tourism Association has over 200 members who pay a subscription to the association for promotion of their product. The Yarra Valley Tourism Association works to promote the Yarra Valley and to bring the various groups together, although due to the reasonably large number of groups, this is at times difficult to achieve. In particular, the Yarra Valley Tourism Association works in conjunction with the Yarra Valley Wine Network, the Yarra Valley Food Group, Yarra Valley Brand and the Yarra Valley Winegrowers Association. Denis Craig, President of the Yarra Valley Tourism Association, argued that while the ‘Run Rabbit Run’ campaign provided an awareness of the Yarra Valley region, the effect of this was not long-lasting. Michael Matthews, Vice-President of the Yarra Valley Tourism Association, suggested that there needs to be a coordinating body for all these groups that assists in developing a more strategic approach to the development of the Yarra Valley. In particular, some initial seed funding would assist in establishing a secretariat to coordinate the strategy and the various groups.

The Wine and Food Operator
As part of the study, it was deemed important to obtain the views of operators within the region. As a consequence, Denis Craig was interviewed to elicit some views, as both an operator within the region, and as the President of the Yarra Valley Tourism Association. Denis and his wife Kerri opened their cellar door at Ainsworth Estate in March 2001. At that time, there were three to four wineries within the immediate vicinity of Ainsworth estate. Now, however, there are fourteen wineries within that same area, showing the growth that has occurred in the four years. During that time, Ainsworth Estate has opened a restaurant and built three luxury accommodation apartments, aimed at the ‘weekend getaway’ clientele and the international market. Over his time in the Yarra Valley, Denis has observed the growth in both the Yarra Valley name and its product, but emphasises the need for an integrated strategy to promote the product benefits.

Key Themes Emerging
Several key themes emerged from the interviews and are summarised below. Information gathered from interviews and site visits indicates that the success of a region depends very much on the level of collaboration between operators as well as pride and providing further regional development.
Collaboration
Collaboration within the Yarra Valley varies, although some groups appear to have more focus than others. Collaboration, for example, is visible through the various groups such as the Yarra Valley Regional Food Group and through the Yarra Valley Tourism Association established in the Healesville Information Centre. Each group provides a different avenue for promoting the region. The Yarra Valley Tourism Association, for example, has 200 members who pay the centre to promote their organisation. The fact that the shire does not fund the centre is unusual in Victoria, and the centre is a very tangible example of the level of collaboration in the area. The aim of the members and the centre is to enhance the tourist experience. For example, many of the accommodation properties provide complementary transport for visitors attending some of the special events that are run within the region. Rochford’s Eyton is a winery that has become a venue for large events such as Musica Viva and other concerts, and local accommodation properties work together to assist in making these events successful.

There is also collaboration between the three information centres located in the region. Referral from one centre to another is common, and there is a concerted effort to promote longer visits in the region. Currently, the majority of the visits are one night in duration and the lack of affordable accommodation has much to do with this trend.

The Yarra Valley Regional Food Group plays a role in promoting the produce from the region. For example, this group has encouraged the bringing together of the local farmers to sell merchandise at the farmers market. Suzanne Halliday explained that the farmers ‘are encouraged to differentiate themselves in some way if they sell the same kind of produce and to help each other to sell their produce – a cooperative effort is encouraged’. The farmers markets also involve a great deal of local loyalty, with people bringing their friends and relatives and other visitors to the region. These types of activities – Farmers Markets – engender local pride that, in turn, attracts visitors to the region through word-of-mouth promotion.

Developing the Yarra Valley Brand
One of the key themes to emerge through the interviews was the desire to promote the Yarra Valley brand as successfully as possible. While a tourism board has been established, there was agreement that developing a coordinated branding strategy still had some way to go. A number of methods appeared to be in place, such as that used by Suzanne Halliday in promoting food products to both the local community and, in particular, to the Melbourne market. Other strategies included promoting the region through events, such as Grape Grazing, held in the region. A number of other strategies were being considered and these included alliances with other wine and food regions for the purposes of attracting inbound tourists. Similarly, the issue of sufficient conference facilities was raised by Michael Matthews as a means of attracting other types of visitors to the region.

Pride in their Region
One of the themes that emerged during the interviews was the pride that people have in their region and their regional products. Michael Matthews, for example, suggested that it was the ambience and natural beauty of the region that draws people to it. Margaret Baker from the visitor information centre discussed the pride in the types of events offered in the region – for example, the success of the Jackson Browne concert held at Rochford’s Eyton which attracted over 7000 attendees. Similarly, there was pride in the unique products of the region such as the range of soft cheeses made at the Yarra Valley Dairy, as well as the history behind many of the buildings in the region, as argued by Suzanne Halliday. These included the dairy and Chateau Yering, both of which have retained many of their original features. Comments were made on some of the newer accommodation properties that indicated the variety of accommodation in the area – the introduction of a new health resort is seen as a new ‘attraction’, attracting more artists. New art galleries are being established and there is now a silversmith and a goldsmith in Healesville who bring visitors to the region on weekends. In addition, the Healesville Hotel offers an extensive wine list and regional foods, and is attracting substantial numbers to the area.

Leadership
Collaboration and pride in the region are often driven by one or two key individuals. In the Yarra Valley, Suzanne Halliday is identified as such an individual; instrumental in the development of the Yarra Valley Food Group and now working on refining Yarra Valley products going to market under this logo. Suzanne Halliday, in a voluntary capacity, has increased awareness in the Yarra Valley and its product; her drive and enthusiasm, as well as the success of the food and wine tourism products, has increased stakeholder pride in their region and encouraged collaboration among stakeholders to continue growing the tourism product of the region. James Halliday has had a similar influence among wine industry stakeholders in the region and his championing of the region’s wine industry has been instrumental in increasing awareness of the Yarra Valley as a wine tourism region.
Macedon Ranges

Identification of a Macedon Ranges food and wine region is a difficult task as Macedon Ranges Shire is just one of the six shires that constitute the Victorian Tourism region, Macedon Ranges and Spa Country. While this case study does focus on the Macedon Ranges as a ‘food and wine’ region, the boundaries are difficult to define in terms of available data. The focus, therefore, has been upon the region that is the part of the Macedon Ranges and Spa Country incorporating Macedon Ranges Shire and the part of Hepburn Shire that takes in Daylesford and Hepburn Springs. In the sections that follow, data cannot be identified as relating to the Macedon Ranges specifically; they either refer to the Macedon Ranges Shire or to the larger region of the Macedon Ranges and Spa Country. In each case the source is clearly specified.

The Macedon Ranges region is located within one hour’s drive north-west of Melbourne’s central business district. The region is renowned for its semi-rural lifestyle, unspoilt landscapes and forests, unique natural features such as Hanging Rock and the character and heritage of local townships like Woodend and Kyneton (Macedon Ranges Shire Council 2004a). The region’s wine industry started at the time of the gold rush of the 1850s, although it declined towards the latter part of the nineteenth century. However, a revival of wine making in the area during the 1970s, largely from small family businesses, began another period of growth. Its close proximity to Melbourne and the beauty of the region both contribute to the region’s popularity (Great Wine Capitals 2004). The Macedon Ranges is mainland Australia’s coolest grape growing region, so the climate also fosters the production of a diverse range of organic produce from herbs to vegetables, grains and fruit.

Characteristics of the Macedon Ranges Shire

The Macedon Ranges Shire is growing steadily. An estimated 38,384 people were living in the shire at 30 June 2002, more than double the number of people living there 25 years earlier. Current estimates forecast that the population hire will grow to approximately 50,000 by the year 2021 (Macedon Ranges Shire Council 2004a). The most significant recent growth has occurred in the southern part of the shire, close to urban Melbourne (Macedon Ranges Shire Council 2004a).

Accommodation in the Macedon Ranges Shire

The Macedon Ranges Shire has a total of 91 accommodation operations. The accommodation outlets in the region according to accommodation type are listed in Table 21.

<table>
<thead>
<tr>
<th>Accommodation type</th>
<th>Operators</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bed &amp; Breakfasts/Guest Houses</td>
<td>49</td>
</tr>
<tr>
<td>Conference Centre</td>
<td>4</td>
</tr>
<tr>
<td>Cottages</td>
<td>13</td>
</tr>
<tr>
<td>Caravan Parks/Camping</td>
<td>3</td>
</tr>
<tr>
<td>Hotels/Motels/Resorts</td>
<td>9</td>
</tr>
<tr>
<td>Retreat</td>
<td>13</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>91</strong></td>
</tr>
</tbody>
</table>

Source: Macedon Ranges Shire Council 2004b
Wineries in the Macedon Ranges

The Macedon Ranges, with its vineyards at an elevation of 400 to 600 metres above sea level, makes the region one of Australia’s coldest wine producing regions. The area suffers from severe wind chill, autumn frosts and hard volcanic soils. Most of the region’s rain falls during the winter months; therefore irrigation is required during the summer. The region specialises in sparkling wines and produces a large number of high-profile boutique brands. Most of the sparkling wines are made from the traditional partnership of chardonnay and pinot noir grape varieties. These are the two most extensively grown and successful grape varieties in the region, along with shiraz. There are over 40 wineries scattered throughout the region, with winery operations ranging in size from small owner-operated vineyards to large national companies. The more predominant wineries in the region are listed in Table 22. Those not listed are generally small operations about which very limited information is available. Map 8 (not to scale) shows the locations of wineries in the Macedon Ranges.

Table 22: Wineries in the Macedon Ranges

<table>
<thead>
<tr>
<th>Name</th>
<th>Cellar Door</th>
<th>Established</th>
<th>Location</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ashworths Hill (now Morgan Hill)</td>
<td>Yes</td>
<td>1982</td>
<td>Lancefield</td>
<td>N/A</td>
</tr>
<tr>
<td>Basalt Ridge</td>
<td>Yes</td>
<td>2003</td>
<td>Malmsbury</td>
<td>N/A</td>
</tr>
<tr>
<td>Big Shed Wines</td>
<td>Yes</td>
<td>2000</td>
<td>Glenlyon</td>
<td>N/A</td>
</tr>
<tr>
<td>Blackgum Estate</td>
<td>Yes</td>
<td>N/A</td>
<td>Metcalfe</td>
<td>4.5 ha</td>
</tr>
<tr>
<td>Cleveland</td>
<td>Yes</td>
<td>1985</td>
<td>Lancefield</td>
<td>4 ha</td>
</tr>
<tr>
<td>Cobaw Ridge</td>
<td>Yes</td>
<td>1985</td>
<td>Pastoria</td>
<td>N/A</td>
</tr>
<tr>
<td>Coliban Valley</td>
<td>Yes</td>
<td>1997</td>
<td>Metcalfe</td>
<td>N/A</td>
</tr>
<tr>
<td>Cope-Williams</td>
<td>Yes</td>
<td>1977</td>
<td>Romsay</td>
<td>N/A</td>
</tr>
<tr>
<td>Glen Erin</td>
<td>Yes</td>
<td>1993</td>
<td>Lancefield</td>
<td>N/A</td>
</tr>
<tr>
<td>Hanging Rock</td>
<td>Yes</td>
<td>1983</td>
<td>Newham</td>
<td>N/A</td>
</tr>
<tr>
<td>Knight Granite Hills</td>
<td>Yes</td>
<td>1970</td>
<td>Baynton</td>
<td>N/A</td>
</tr>
<tr>
<td>Ellender Estate</td>
<td>Yes</td>
<td>1996</td>
<td>Glenlyon</td>
<td>N/A</td>
</tr>
<tr>
<td>Mt Macedon Winery</td>
<td>Yes</td>
<td>1989</td>
<td>Mt Macedon</td>
<td>8 ha</td>
</tr>
<tr>
<td>O’Shea &amp; Murphy</td>
<td>Appointment only</td>
<td>1984</td>
<td>Pipers Creek</td>
<td>8 ha</td>
</tr>
<tr>
<td>Portree</td>
<td>Yes</td>
<td>1983</td>
<td>Lancefield</td>
<td>5 ha</td>
</tr>
<tr>
<td>Sandy Farm</td>
<td>Yes</td>
<td>1988</td>
<td>Malmsbury</td>
<td>2.5 ha</td>
</tr>
<tr>
<td>Virgin Hills</td>
<td>Yes</td>
<td>1968</td>
<td>Lauriston</td>
<td>12 ha</td>
</tr>
</tbody>
</table>

Source: Macedon Ranges Vineyards and Wineries 2004
Special Food Attractions in the Macedon Ranges

Within the Macedon Ranges region there are now many farmers growing a diverse range of organic produce, from herbs to vegetables, grains and fruit. Local produce is sold by the roadside at stalls and can also be sampled at many of the local restaurants and food outlets. In addition, the annual Harvest Picnic, held every February at Hanging Rock, provides a forum to showcase much of the best produce of the region.

Macedon Ranges Shire

Kyneton Olives
Kyneton Olives is located at Kyneton, where the climate was considered by the founder to be similar to that of Southern Italy and so ideal for the growth of olives trees. Kyneton Olives now also produces olive products including a range of high quality virgin olive oils, infused oils, crushed olives and tapenades.

Holgate Brewhouse
Located in Woodend, the Holgate Brewhouse brews its own beer onsite. The brewery serves regional food as well as local beers, and visitors can see how the beer is made on the premises.
Hepburn Shire

Sweet Decadence
Sweet Decadence at Locantro, Daylesford, is a BYO café that serves coffee and ‘fine food’ and also specialises in handmade chocolates that are made onsite and specially packaged for the customer.

Himalaya Bakery
The Himalaya Bakery in Daylesford specialises in breads with a range of ‘full-bodied flavours’ that are made according to strict biodynamic principles and using organic sourdough techniques.

Restaurants and Cafés in the Macedon Ranges
In Table 23, the number of restaurants and cafés in the townships in the Macedon Ranges region are provided. The small number of restaurants in the Macedon Ranges Shire, seventeen, is supplemented by the larger number of eating establishments in Daylesford including Lake House, first established in 1983 as a fine dining restaurant. Several of the vineyards in the Macedon Ranges operate a café or restaurant but many of them are only open at weekends or for large groups where bookings are required.

<table>
<thead>
<tr>
<th>Location</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Woodend</td>
<td>9</td>
</tr>
<tr>
<td>Romsey</td>
<td>4</td>
</tr>
<tr>
<td>Lancefield</td>
<td>4</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>17</strong></td>
</tr>
</tbody>
</table>

**Source:** Macedon Ranges Shire Council 2004b

Visitor Information Centres in the Macedon Ranges
The Macedon Ranges and Spa Country spreads across six shires, and the region is serviced by six accredited visitor information centres. The Macedon Ranges Shire Council operates just two of them; those located in Kyneton and Woodend. The centres operate with the ongoing support of volunteers who provide detailed information about the region for visitors’ specific needs. Both centres are open seven days a week from 9am to 5pm.

Visitor Numbers and Activities in the Macedon Ranges Shire

**Visitor Numbers (Visitor Information Centre Data)**
Visitor numbers to the Macedon Ranges, determined from counts of visitors to the Kyneton and Woodend Visitor Information Centres, indicate that in the year ending December 2002 the total number of visitors was 33,666. This was an increase of 2,254 on the numbers for the year 2000. Of these visitors, 87.5% were from Victoria and 3.5% were international visitors, with interstate visitors making up the remainder (4% from New South Wales, 2% from Queensland and 3.5% from other states). Of the 87.5% intrastate visitors, the largest proportion, 58%, originated from Melbourne and surrounding suburbs, 16% were people living locally and 13% came from country Victoria. March saw the highest proportion of visitors to the region, at 10%, closely followed by January (9.5%), then April (9%), while December and June had the lowest numbers of visitors.

**Purpose of Trip**
The main purpose of visits to the region was for a day trip (32% of visitors) followed by business (22%) and a holiday (18%).

**Total Visitors in 2003**
More comprehensive data from the National Visitor Survey published by Tourism Research Australia in 2003 (cited by Macedon Ranges Shire Council 2004a) indicates that there were 950,000 visitors to the Macedon Ranges Shire in 2003. During that year there were 768,000 visitors making day trips and 182,000 overnight visitors.
Visitors to Macedon Ranges and Spa Country

Tourism Victoria also monitors visitor numbers to Victoria’s regions and a summary of for the period 2000-2003 for the Macedon Ranges and Spa Country is provided in Table 24.

Table 24: Visitors to Macedon Ranges and Spa Country

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic visitors</th>
<th>Year</th>
<th>International visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total Day Trip Visitor Numbers</td>
<td></td>
<td>Total Visitor Numbers</td>
</tr>
<tr>
<td>2000</td>
<td>1,446,000</td>
<td>2000</td>
<td>7,000</td>
</tr>
<tr>
<td>2001</td>
<td>1,345,000</td>
<td>2001</td>
<td>7,000</td>
</tr>
<tr>
<td>2002</td>
<td>1,248,000</td>
<td>2002</td>
<td>6,000</td>
</tr>
<tr>
<td>2003</td>
<td>1,393,000</td>
<td>2003</td>
<td>8,000</td>
</tr>
</tbody>
</table>

Source: Tourism Victoria 2004

Visitor Activities

As shown in Table 25, the most popular natural attractions in the Macedon Ranges Shire and surrounding area with the most interest included Hanging Rock (41%), Macedon Regional Area (19%) and springs and waterfalls (16%).

Table 25: Visitor activities in, and in close proximity to, the Macedon Ranges Shire

<table>
<thead>
<tr>
<th>Natural Attractions</th>
<th>Visitor Interest %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hanging Rock</td>
<td>41.0</td>
</tr>
<tr>
<td>Hepburn Regional Park</td>
<td>5.0</td>
</tr>
<tr>
<td>Ledererg George</td>
<td>1.0</td>
</tr>
<tr>
<td>Macedon Regional Area</td>
<td>19.0</td>
</tr>
<tr>
<td>Organ Pipes</td>
<td>0.8</td>
</tr>
<tr>
<td>Wombat Forest</td>
<td>0.6</td>
</tr>
<tr>
<td>Woodlands Historic Park</td>
<td>0.5</td>
</tr>
<tr>
<td>Picnic Spots</td>
<td>8.5</td>
</tr>
<tr>
<td>Spring/Falls</td>
<td>16.0</td>
</tr>
</tbody>
</table>

Source: Macedon Ranges Shire Council 2004b

In the Daylesford area, attractions include the Hepburn Spa Resort, Lavandula Lavender Farm, Tuki Trout Farm and the Convent Gallery.

Marketing of the Macedon Ranges

The Macedon Ranges Shire Council is responsible for the marketing of the Macedon Ranges. Tourism Victoria, in conjunction with the Macedon Ranges and Spa Country Campaign Committee, is responsible for the marketing of the Macedon Ranges together with the Spa Country region. Tourism Victoria has developed a regional partnership program (RPP), which is a state government funded program to facilitate more effective, strategic and integrated marketing of regional Victoria, in partnership with industry.

Essentially, the RPP works in the same way for the Macedon Ranges as it does for the Yarra Valley.
Food and Wine Regional Development Groups in the Macedon Ranges

The Daylesford Macedon Produce Group
The Daylesford Macedon Produce Group was launched in February 2002 at the Lake House Market Day. The aim of the group is to establish the area as a recognised food and wine region. The group’s activities include marketing, training and educating local council members of the importance of tourism and the use of local produce. Members have access to material entitling them to advertise their produce as Daylesford Macedon Produce Group.

Interviews
Group interviews were conducted with founder members of Daylesford Macedon Produce Group (DMP) on two occasions; one year after its launch and six months later. At the first group interview, three members of the group, including the coordinator and Jenny Ellender of Ellender Estate winery, were present. The coordinator’s role is funded by the government of Victoria through the Regional Forest Agreement for a period of three years. Six months later, a second interview was conducted with the Daylesford Macedon Produce Group coordinator, Jenny and Graham Ellender. Other interviews were conducted with Barbara Nixon of Gisborne Peak Winery, a Tourism Officer from Hepburn Shire Council, and Simone Gordon, Tourism and Events Officer from Macedon Ranges Shire Council.

Daylesford Macedon Produce Group
Daylesford Macedon Produce Group is a food and wine produce group that was initiated by three key players in food and wine tourism in the region; Alla Wolf Tasker of Lake House, Jenny Ellender of Ellender Estate and Frank Moylan of the Farmers Arms Hotel. The group was launched at a market day held at Lake House in February 2002. This was followed by a second market day, also held at Lake House, in February 2003. Daylesford Macedon Produce Group is a working party that reports to the Marketing Committee of the Macedon Ranges and Spa Country Tourism Campaign. One of the marketing strategies of this committee is to promote food and wine tourism. The intention is for the region to become recognised as a food and wine region rather than just being known for a small number of icons. The group is working on branding for local produce. In order to qualify for use of the Daylesford Macedon Produce Group brand, products have to be either grown or produced in the area. The region offers a wide range of local produce, including organic farm products, but, as many of the growers are on a micro scale, farm gate sales have not been fully developed. Membership now costs $100 per annum and there are currently over 80 members.

The group is trying to encourage local businesses to use local produce and this requires education of both growers and restauranteurs. In order to incorporate local produce into their menus and utilise it in marketing their businesses, restauranteurs need to approach producers and growers to find out what local produce is available that they can use. The problem in such a country area is the lack of transport and infrastructure for the delivery of local produce, especially when businesses are small and distances are great.

As the region has recognisable seasons, with snow in winter at one extreme and hot dry summers at the other, the group sees the area’s main attraction as a ‘lifestyle thing... rejuvenation thing’. Indeed, in its marketing, the region uses the term ‘indulgence’ to describe the experience that is offered. The idea, as the Daylesford Macedon Produce Group coordinator said, is ‘to satisfy all the senses. Food and wine is really part of that, satisfying the senses’. Members also observed that the area attracts more couples than families, the visiting friends and relatives segment is large and the gay and lesbian market is also significant. They also considered that there is ample accommodation offered over a wide price range for both short and long stay visitors and that, as the area is only one to one-and-a-half hours’ drive from Melbourne, it attracts many day visitors.

A limitation that the group is facing is that many of the food and wine businesses are small, of a boutique nature, and many of the operators do not want to become large, ‘they want to be at the sustainable level but without having to go that extra mile. It’s at that level before you have to put on more staff and you’ve got other costs’.

Six months later, the group was working more intensively on marketing and branding produce, recognising the need for more communication between members from both a networking point of view and from a practical perspective. In order to achieve this, a website was planned to have a ‘front end’ for the public to see and a ‘back end’ for members to talk to each other and serve a ‘housekeeping’ purpose. Ultimately, the aim is to sell branded products online to generate income to cover operating costs.

Marketing of the region is done largely by Tourism Victoria through the Macedon Ranges and Spa Country Tourism Campaign. There is no tourism association in Daylesford and the tourism association of the Macedon Ranges disbanded for three years but has recently started up again. There were two vignerons’ associations; the Kyneton Vignerons Association and the Macedon Vignerons’ Association, but they have now formed one group; the Macedon Ranges GI Wine Region. It is more expensive to join, at $250/300 per year, with a membership of...
32 wineries and one brew house, but the association does not spend much on marketing. Further, there is no collective marketing for retailers in Daylesford either, as there is no retailers group. Consequently, there is concern over the lack of collaboration of business operators to provide, for example, a consistent pricing policy across the industry to avoid undercutting. An additional area of concern is the apparent lack of appreciation among other business operators of the economic benefits of tourism to the area. Greater collaboration between the various groups of stakeholders is therefore considered necessary to facilitate more effective marketing.

It was acknowledged that at present the region is not well-known as a food and wine region, rather the mineral springs constitute the major attraction. In addition, the group observed that there are several opportunities that have not yet been taken up within the region for further development of the key attractions. For example, there is no mineral water bottling plant in the Hepburn Springs area. Further, there are many winery operators that ‘believe that they make a very good wine and sell the wine, and they are not in the wine tourism area’. However, this may also be because many of the wineries are small and the operators have other jobs as well as running the wineries.

A significant development in the marketing of the region in terms of food and wine is Budburst, an annual event, that is held in the Macedon Ranges. For the 2003 Budburst, a two-day event was held at Hanging Rock that was underwritten by the musicians who were performing there, Daylesford Macedon Produce Group was also involved ‘to get the food people there as well as the wineries’. Daylesford Macedon Produce Group is also encouraging involvement in farmers’ markets that are held in the surrounding townships, for example the one held in Castlemaine.

The group believes that alliances are also important, especially with teaching institutions that can provide training for the industry. Alliances with suppliers and other food groups are being investigated, including the Ballarat Food Group and the Grampians Food Group. Alignment with art and ecology in the area would also be an advantage. In summary, collaboration, cohesiveness and education are thought to be important areas that need developing to make more progress in the development of the Macedon Ranges as a food and wine region.

**Daylesford Visitor Information Centre**

The Daylesford Visitor Information Centre is financed by the Hepburn Shire Council, with two employees; the Manager of Tourism and Recreation and a Tourism Officer who is responsible for the day-to-day running of the centre. It is staffed entirely by volunteers, who work four-hour shifts once a week or once a fortnight. The information centre provides brochures and information about attractions and businesses in the region, but does not provide a booking service, as there are five booking agencies in Daylesford. However, it is kept informed of vacancies by accommodation providers who are financial members of the centre. A list of accommodation in the area is being compiled and over 500 operations, sleeping up to 4,000 people, have already been identified in the Daylesford and Hepburn Springs area alone. There is a wide range of accommodation but the majority is in the four-star plus bracket, with plenty of boutique accommodation for which the area is well known. At peak times the accommodation is completely booked out.

The council does not have a complete list of wineries or food producers in the region, but does stock brochures from a wide range of local producers. However, there is an Eating Out Guide that lists local restaurants and there are activities information sheets, for example ‘What to do as a Couple’ and ‘What to do as a Family’. People come to the region for the spa and massage and for natural health therapies, of which there are 80 different types available. Other categories of attractions include antiques and art, with the Convent Gallery being a main tourist icon in Daylesford. Outdoor activities are also available, including horse riding, golf, fishing and miniature mazes.

The Council uses the Roy Morgan Values segments for visitors and the principal segment is the Visible Achievers and the Socially Aware in the 35 years plus age group:

*They’ll generally stay up to 4 days at a time, they want flexibility once they get here, they’re quite happy to spend their money, they want the best accommodation, they want fine dining, and then of course they want the other experiences as well. They want our volunteers to be able to provide them with some information about the natural attractions, about the history - they’re really interested in discovering the area, and they do like discovering things themselves.*

The emergence of the ‘girl group’ has been noted – women getting away as a group for a ‘small indulgence thing’, leaving the children at home and going on a ‘weekend away for the girls’. In addition, the family groups are observed to be returning, especially in the school holidays and for day trips. However, the enquiries in school holidays are mostly about the health therapies, e.g. out of 40 enquiries only two would be about wineries.

Generally, ‘holistic health’ is the first thing visitors want to find out about, with the mineral springs the focus of interest. The wine experience is often recommended to visitors as a suitable end to their visit; to follow a wine trail through the Macedon Ranges on their way back to Melbourne or, if their direction of travel is in the opposite direction, through the Ballarat region. However, there are also some events held in the region that are helping to promote local wineries, e.g. the Daylesford Show is starting to give awards for local wineries.
**Kyneton and Woodend Visitor Information Centres**

The Kyneton and Woodend Visitor Information Centres are both financed and managed by the Macedon Ranges Shire Council. There is one employee who job-shares and 70 volunteers. The other four accredited visitor information centres are managed by four different shire councils; Daylesford by Hepburn Shire, Sunbury by Hume, Melton by Melton Shire and Kilmore by Mitchell Shire. All six shires are under the umbrella of the Macedon Ranges and Spa Country and so they all work together, each shire keeping the others informed of events.

The centres do not offer a booking service for accommodation but, like the Daylesford Visitor Information Centre, they are kept informed about vacancies by accommodation operators, keep a list of accommodation operations and stock their brochures. Each of the centres has a database of accommodation available on computer and information about accommodation is also available on the website for the Macedon Ranges Accommodation Association, where a booking form is provided. While more of the accommodation available in the Daylesford area is at the higher end of the price range, in the Kyneton and Woodend area it is in the mid-price range. The Kyneton and Woodend centres also sell a small number of items limited to historical information, maps, licences and postcards. This is a deliberate policy as the volunteers are not all happy to ‘deal with cash’.

A door counter is used to count the number of visitors at the Daylesford Visitor Information Centre, while at the Kyneton and Woodend Visitor Information Centres a manual system is used that involves recording details of visitors in a diary. Visitors to the area are approximately 70% from Melbourne and the rest from interstate and overseas. The web link between Tourism Victoria and New Zealand has resulted in a lot of cross-promotion.

The region is well-known for its gardens and there are also art galleries, with many artists and sculptors living in the area, some of whom are nationally recognised. There are two horticultural societies that are involved in the Australian Open Gardens scheme and organise rare plant sales. The area has many reserves as well as the Macedon Regional Park and the Botanical Gardens. There are mineral springs, and water from the Kyneton Mineral Springs is bottled locally and exported.

In this part of the region, most events occur from spring through to autumn, with less happening in the winter. Several events are held at Hanging Rock, including the annual Harvest Picnic, ‘an annual picnic that brings together the very best of fine food and wines alongside cooking demonstrations, arts and entertainment for a celebration of good eating and good living’ (Hanging Rock Development Advisory Committee and Macedon Ranges Shire Council 2005), and annual film night screening the famous movie ‘Picnic at Hanging Rock’ under the stars. There is also a racing season, with racecourses at Hanging Rock and at Kyneton. The Kyneton Cup falls after the Melbourne Cup and a point of difference is the setting; ‘the atmosphere is fantastic, the scenery is just magnificent, and you haven’t got those hideous crowds that you have to deal with in Melbourne’.

The region has almost 50 wineries, with Knights Granite Hills and Hanging Rock winery being well-established. Simone observed that now the two local Vignerons’ Associations have amalgamated and the Daylesford Macedon Produce Group is established, it will be easier to manage the combination of food and wine tourism. Food guides are produced for each of the townships in the Macedon Shire and the Daylesford Macedon Produce Group works with restauranteurs to develop regional food platters, educating them to be more aware of what local produce is available. There are also farmers markets held in Lancefield every fourth Saturday.

The area, therefore, has a number of attractions; ‘probably our key things would be wine and food, our natural attractions which include gardens... the art and café scene... There is something here for everyone’.

Simone Gordon organised the long lunch at Hanging Rock and has also been very involved in the organisation of Budburst. She noted the value of the Daylesford Macedon Produce Group, stating, ‘Having the DMP [Daylesford Macedon Produce Group] has made a huge difference to the area... The food element... hasn’t ever really been there with Budburst, it hasn’t ever really been a regional focus like the wine has, whereas now we’ve been able to, with the help of DMP, marry those two’. The purpose of doing this at Budburst was to show visitors what the area has to offer, far more than they could see in a single visit.

The greatest barrier to development is the lack of time that producers have. They are mainly small businesses where they have to provide much of the labour themselves, so they have less time to spend on marketing promotions. The main task that Simone sees is to get people to meet and communicate, breaking down the barriers to facilitate collaboration. They can also exchange information about what is happening in the area. Most do not have time to go out to see for themselves what the visitors will be doing, as they are too busy running their businesses. Simone believes that by working together they can all benefit, helping each other. For example, accommodation operators, when their own accommodation is full, giving referrals to other businesses; ‘it’s just a matter of building all those sorts of relationships’. Further afield, at the Farmers Markets Association of Victoria, producers from farmers markets across Victoria can display their produce and see what others are producing in other parts of the state; yet another opportunity to learn and share ideas.
Winery Operator

Barbara Nixon and her husband Bob own and operate Gisborne Peak Winery. Barbara previously owned a tour company, Victoria Winery Tours, that she started in 1991, when wine tourism was in its infancy. As Barbara says, she has ‘been to a lot of tasting rooms and in all those years of standing and watching people and making observations, formed a lot of opinions about wine tourism’. For Barbara’s company, the Yarra Valley was the predominant wine tourism destination in Victoria, with 80% of the tours going there but also, because of the smaller minibuses they used, they were able to keep the size of the tour parties down to small numbers and so smaller wineries could also be visited on these tours. Barbara learnt a lot from the visitors; what they liked about the wineries they visited and why they liked them.

Barbara believes there has to be a commitment to wine tourism by the winery operator to make it work, which means that the winery must be open seven days a week. Even with few weekday visitors this is necessary for the development of the region as a food and wine region.

Daylesford Macedon Produce Group is seen as an important development, with its focus on marketing the region’s produce, a necessary addition to the Vigneron’s Association which focus more on viticulture. The group is still working on branding and how to utilise the logo. The key is for everyone to work collectively on promoting a Macedon Ranges brand. Currently:

Most people don’t even know about Macedon Ranges wines; we hear it all the time, we’re very much a gateway winery to the area, the first stop... And I send them off into the region and they say, ‘I had no idea that there were other wineries up here’.

Gisborne Peak Winery is promoted for wine tourism; ‘the whole experience of food, wine, music, views, ambience, the whole thing... we’re tourism that sells wine. We have approached it from the other way up’. Besides selling their own wine, they have also started to sell local food produce like chutneys and biscuits for visitors who want to buy something but not necessarily wine. The cellar door was designed utilising Barbara’s years of observation. The winery also offers wood fired pizzas that go very well with their wine and, as well as a good view of the surrounds from the windows, there are photographs showing the winery’s development and activities over the years. Visitors like to hear stories about the winery; it gives them memories to take away with the wine and to talk about with friends and at dinner parties when they serve the wine. They want to learn about grape growing ‘vicariously’. Memories of the experience of the visit are what people take home when they buy the wine. This is all about wine tourism, not wine making; there are other wineries where people can go to learn about the art of wine making.

The barriers to development are diverse. Signage is one problem, as the local shire only allows three signs per business and that can be a problem if the business is off the main road and requires more than three turns. Some signage is also underdeveloped, e.g. signs for ‘indulgence’ tours have been erected in places but they do not follow the entire route and visitors can easily get lost. This problem is partly connected with the way the wineries are spread throughout the region; it is not compact with major highways close by, as is the case for the Yarra Valley.

For a region to develop, encouragement for tourism businesses to start up in the region is required and a nurturing approach to be taken. For example, in the Yarra Valley, the shire council produced a book that provided advice to wineries that would like to open a cellar door.

People go on wine tours generally because they want a day out of the city in the country, and they get good food and wine. In the Macedon Ranges many day visitors are from the western side of the city, while those who have been on a weekend break often call in to the winery after spending the weekend in Daylesford on their way home to the eastern suburbs. The point of difference of the Macedon Ranges region from the other two food and wine regions that are within an hour’s drive of Melbourne (Yarra Valley and Mornington Peninsula) is that ‘Macedon is stately, It’s classic... it has so many layers... you really need to explore’.

Key Themes Emerging

While the roles of the various committees, associations and shire councils feature strongly in the development of a food and wine region, the underlying impetus for the vitality of these organisations and their effectiveness in marketing a region as a food and wine region depends on the leadership, energy and commitment of key individuals who are champions for the region.

Collaboration

Daylesford Macedon Produce Group, initiated by a group of three individuals who worked together to set it up and launch it, is a prime example of local collaboration within a region. Daylesford Macedon Produce Group is not simply a food group; it includes wineries as well as food producers, hence the term ‘Produce’ in the name. No group works in isolation, however, and the role of the shire councils with their visitor information centres and tourism officers is also vital for the development of a food and wine region. The visitor information centres likewise depend upon the work of volunteers who, by the very fact that they provide their services without
payment, show considerable local interest and hence collaboration of individuals for the marketing of local tourism businesses and the region as a whole. The tourism officers not only manage the day-to-day running of the visitor information centres but also help to organise local events and actively seek to encourage groups of tourism oriented business people to work together in developing the Macedon Ranges as a food and wine region. For example, the annual Budburst event held at Hanging Rock and various wineries throughout the Macedon Ranges provides the opportunity to bring food producers and winery operators together with a common goal to showcase the region’s food and wine for visitors to obtain a preview of what the region offers in a single visit.

The key to effective collaboration is for operators to realise the value of helping to promote the region through cooperation with other businesses. This may occur not only through contributions of time and effort to local groups like the Daylesford Macedon Produce Group, but also through recommendations and referrals to visitors for other businesses. In this way, other businesses may benefit and, at the same time, goodwill is created between business operators.

**Champions**

The initiative to start the Daylesford Macedon Produce Group came from individuals who were themselves entrepreneurs in the region and who had the energy and drive to bring people together for the benefit of the region. Alla Wolf Tasker of Lake House, Jenny Ellender of Ellender Estate and Frank Moylan of the Farmers Arms are all entrepreneurs in the region and have a vision for the region to become recognised as a food and wine region. Once the Daylesford Macedon Produce Group was established this vision also became the group’s principal aim, the focus being on promoting the region. As a working party reporting to the Marketing Committee of the Macedon Ranges and Spa Country Tourism Campaign, Daylesford Macedon Produce Group’s marketing focus is well-supported.

In addition to local entrepreneurs, shire council tourism officers may also function as champions for the region in the ways in which they involve themselves in the organisation of events, e.g. Budburst, and actively encourage organisations like the Daylesford Macedon Produce Group.

**Conclusion and Recommendations**

The issues that appear in common in each of the regions are those of the role of a champion or leader and the level of collaboration within each of the regions. Both the Yarra Valley and the Daylesford Macedon Ranges have strong leaders prepared to promote the value of the regional products. Similarly, both regions have groups that are prepared to collaborate to enhance the marketing of their product so that the product becomes well recognised as something that is unique to the region and to Victoria. Both regions offer a range of excellent products that have evolved over time. The commonality of the food groups in each of the two regions examined here suggests that there is strength of pride and belief in the region and its product that enables the continued enhancement both of the product and the marketing of a unique and enduring regional product.

Both regions have substantial potential for further development. What appears to be important in both regions is the integration and coordination of a strategic plan that will continue to promote and develop the region and its key attributes. In particular, the following are recommended:

- The appointment of an overarching body to promote food and wine as tourism attractors in each region;
- The development of alliances within and between regions to provide economies of scale as well as variety for visitors;
- A key attribute (or perhaps two) that represent the region for simplicity of promotion;
- Monitoring of the coordination of promotion by Tourism Victoria; and
- A focus on providing regional food and wine at all establishments within the regions to promote the uniqueness of the regional product.

The development of the food and wine nexus within Victoria is at a crucial stage – as one interviewee stated, ‘Victoria is on the cusp of getting this right, but it may miss out’. The time is right for a more coordinated and strategic focus on Victorian regional food and wine.
## APPENDIX A: QUEENSLAND STAKEHOLDERS INTERVIEWED

<table>
<thead>
<tr>
<th>Name</th>
<th>Organisation</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sunshine Coast Region</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Helen Brierty</td>
<td>Spirit House Restaurant &amp; Cooking School</td>
<td>Owner/manager</td>
</tr>
<tr>
<td>Leonie Palmer</td>
<td>Noosa Regional Food Group</td>
<td>Member</td>
</tr>
<tr>
<td>Kali Nielsen</td>
<td>Rural Futures Network/Slow Food Noosa</td>
<td>Manager</td>
</tr>
<tr>
<td>Andrew Fairbairn</td>
<td>Tourism Noosa</td>
<td>Marketing Executive</td>
</tr>
<tr>
<td>Jack Connolly</td>
<td>Sunshine Coast Wineries Association</td>
<td>President</td>
</tr>
<tr>
<td><strong>South Burnett</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chris Ganzer</td>
<td>Stuart Range Estate</td>
<td>General Manager</td>
</tr>
<tr>
<td>Kate Davis</td>
<td>Clovely Estate Winery</td>
<td>Cellar Door Manager</td>
</tr>
<tr>
<td>Debbie Postle</td>
<td>South Burnett Tourism</td>
<td>Tourism Projects Manager</td>
</tr>
<tr>
<td>Bruce Hurley</td>
<td>The Left Bank</td>
<td>Owner/operator</td>
</tr>
</tbody>
</table>

### Field Visits

#### Sunshine Coast Region:

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dingo Creek Vineyard</td>
<td>Traveston</td>
</tr>
<tr>
<td>Futures Centre/Slow Food Festival</td>
<td>Pomona</td>
</tr>
<tr>
<td>Garnisha Foods</td>
<td>Pomona</td>
</tr>
<tr>
<td>Settlers Rise Winery</td>
<td>Montville</td>
</tr>
<tr>
<td>Maroochy Springs Winery</td>
<td>Eerwah Vale</td>
</tr>
<tr>
<td>Spirit House Restaurant/Cooking School</td>
<td>Yandina</td>
</tr>
<tr>
<td>Barambah Ridge Cellar Door</td>
<td>Noosa</td>
</tr>
<tr>
<td>Ricky Ricardos</td>
<td>Noosa</td>
</tr>
</tbody>
</table>

#### South Burnett Region:

<table>
<thead>
<tr>
<th>Site</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clovely Estate</td>
<td>Murgon</td>
</tr>
<tr>
<td>The Left Bank</td>
<td>Kilkivan</td>
</tr>
<tr>
<td>Dusty Hill Vineyard</td>
<td>Moffatdale</td>
</tr>
<tr>
<td>Cranes Winery</td>
<td>Boogie</td>
</tr>
<tr>
<td>Belltower Restaurant</td>
<td>Boogie</td>
</tr>
<tr>
<td>Stuart Range</td>
<td>Kingaroy</td>
</tr>
<tr>
<td>Tabbinga Homestead</td>
<td>Kingaroy</td>
</tr>
<tr>
<td>Bella Villa Farm</td>
<td>Kilkivan</td>
</tr>
</tbody>
</table>
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The Sustainable Tourism Cooperative Research Centre (STCRC) is established under the Australian Government’s Cooperative Research Centres Program. STCRC is the world’s leading scientific institution delivering research to support the sustainability of travel and tourism - one of the world’s largest and fastest growing industries.

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**Sustainable Destinations:** Infrastructural, economic, social and environmental aspects of tourism development are examined simultaneously.

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