FOOD AND WINE TOURISM
Analysing key characteristics of selected Australian regions

Linda Roberts and Margaret Deery
Analysing key characteristics of selected Australian regions

Technical Reports
The technical report series present data and its analysis, meta-studies and conceptual studies, and are considered to be of value to industry, government and researchers. Unlike the Sustainable Tourism Cooperative Research Centre’s Monograph series, these reports have not been subjected to an external peer review process. As such, the scientific accuracy and merit of the research reported here is the responsibility of the authors, who should be contacted for clarification of any content. Author contact details are at the back of this report.

National Library of Australia Cataloguing in Publication Data
Roberts, Linda.
Food and wine tourism: analysing key characteristics of selected Australian regions / authors, Linda Roberts; Margaret Deery.
ISBN: 9781920965426 (pbk.)
Other Authors/Contributors: Deery, Margaret.
338.479194

Copyright © CRC for Sustainable Tourism Pty Ltd 2008
All rights reserved. Apart from fair dealing for the purposes of study, research, criticism or review as permitted under the Copyright Act, no part of this book may be reproduced by any process without written permission from the publisher. Any enquiries should be directed to:
General Manager Communications and Industry Extension, Amber Brown, [amber.brown@crctourism.com.au] or Publishing Manager, Brooke Pickering [brooke.pickering@crctourism.com.au].

First published in Australia in 2008 by CRC for Sustainable Tourism Pty Ltd
Edited by Brooke Pickering
Printed in Australia (Gold Coast, Queensland)
Cover designed by Sin Design
CONTENTS

ABSTRACT VI
ACKNOWLEDGEMENTS VI
SUMMARY VII
METHODOLOGY VII
KEY FINDINGS VII
Emerging wine regions vii
Growing wine regions viii
Maturing wine regions viii
Rejuvenating wine regions viii
CHAPTER 1 BACKGROUND 9
WINE TOURISM 9
TOWARDS A WINE REGION TYPOLOGY 9
AIMS OF THE STUDY 10
OBJECTIVES 10
BENEFITS OF THE PROJECT 10
CHAPTER 2 LITERATURE AND CONCEPTUAL FRAMEWORK 11
WINE TOURISM 11
Industry research 11
Towards a wine region typology 12
CONCEPTUAL FRAMEWORK 13
Regional identity 13
Network categories 14
The research sites 16
CHAPTER 3 METHODOLOGY 19
STAGE ONE SECONDARY DATA COLLECTION 20
STAGE ONE SECONDARY DATA COLLECTION 21
STAGE TWO WINE REGION CASE STUDIES 21
CHAPTER 4 RESULTS 23
OVERVIEW 23
REGION SAMPLE 23
EMERGING WINE REGIONS: KING VALLEY (VICTORIA) 26
Overview 26
Regional structure 26
Regional resources 26
Regional segments 26
Affiliations and networks 27
Relationship structure 28
Festivals and events 29
EMERGING WINE REGIONS: ADELAIDE HILLS (SOUTH AUSTRALIA) 30
Overview 30
Regional structure 30
Regional resources 30
Regional segments 30
Affiliations and networks 32
Festivals and events 33
GROWING WINE REGIONS: MORNINGTON PENINSULA (VICTORIA) 34
Overview 34
Regional structure 34
Regional resources 34
List of Tables

Table 1: Interviews of Key Stakeholders in the Wine Regions ...................................................... 22
Table 2: Wine Region Summary ...................................................................................................... 24
Table 3: King Valley Relationship Structure .................................................................................. 29
Table 4: King Valley Region Segments ........................................................................................... 29
Table 5: Adelaide Hills Relationship Structure .............................................................................. 33
Table 6: Adelaide Hills Region Segments ....................................................................................... 33
Table 7: Mornington Peninsula Regional Identity .......................................................................... 38
Table 8: Mornington Peninsula Regional Segments ....................................................................... 38
Table 8: McLaren Vale Regional Identity ....................................................................................... 42
Table 9: McLaren Vale Region Segments ....................................................................................... 42
Table 10: Yarra Valley Regional Identity ........................................................................................ 46
Table 11: Yarra Valley Region Segments ......................................................................................... 46
Table 12: Coonawarra Regional Identity ......................................................................................... 50
Table 13: Coonawarra Region Segments ......................................................................................... 50
Table 14: Rutherglen Regional Identity .......................................................................................... 53
Table 15: Rutherglen Region Segments .......................................................................................... 54
Table 16: Barossa Valley Regional Identity ..................................................................................... 56
Table 17: Barossa Valley Region Segments ..................................................................................... 57
Table 18: Regional identities ........................................................................................................ 60

List of Figures

Figure 1: Regional segments (Adapted from Ritchie, 1993) ............................................................ 13
Figure 2: Tourism networks ............................................................................................................ 14
Figure 3: Action sets ...................................................................................................................... 14
Figure 4: Organisational sets ........................................................................................................ 15
Figure 5: Dyadic linkages .............................................................................................................. 15
Figure 6: Regional identity ........................................................................................................... 16
Figure 7: Location of wine regions in different stages of development ......................................... 19
ABSTRACT

This report presents the findings from a multi-method study to examine a range of wine regions within Australia and, through this investigation, develop a winery typology. A multi-method approach, utilising both qualitative and quantitative methods, was undertaken that involved an extensive literature search from a range of sources including the findings of the STCRC ‘Good Living’ Tourism project; a case study approach was also undertaken by gathering primary data through in-depth interviews with key stakeholders in the eight wine areas. By assessing the attributes of each of the wine regions, they were placed into four development stages, namely emerging; growing; maturing and rejuvenation. Evidence of the stage of development was also found in the alliances and networks that had formed within each of the wine regions. For example, the regions that were in the maturing stage had more developed alliances than those in the emerging or growing areas. The implications are that wine regions should be aware of not only the intrinsic attributes such as attractions and natural environment, but also how these various factors within the region can cooperatively work together to promote the wine growing regions, in order to compete against other national and global wine tourism destinations.

Acknowledgements

The Sustainable Tourism Cooperative Research Centre, established and supported under the Australian Government’s Cooperative Research Centres program, has funded this research. Collaborators in this research were Professor Beverley Sparks (Griffith University), Jenny Davies (University of South Australia) and Lorraine Brown (University of South Australia). Research assistance from Victoria University, Griffith University, and University of South Australia is recognised. The research team would like to acknowledge the contributions of Kirsty Tumes, Robb Mason, Regina Quaison, Petah Gibbs and Peter Sherwood, who each contributed as research assistants to various components of this project.
SUMMARY

There were several major objectives of this study. First, the study aimed to identify the components of the wine tourism experience (by building upon the findings of the ‘Good Living’ Tourism project). It also aimed to expand the repertoire beyond the wine itself to the supporting framework provided by the wineries in particular, and the region within which the winery is located. Second, the study aimed to develop a profile of the wine tourist by extending the demographic and psychographic findings of the ‘Good Living’ Tourism project. This second objective is covered in the report by Professor Beverly Sparks (2006). The third objective was to develop a winery typology in terms of the stage of development and geographical location of the wine region incorporating categories of wineries in terms of size, type (extending beyond the wine itself to added value in terms of restaurant, sales of wine/food/souvenirs, tours), organisational structure, region in which they are located (that may have other attractions, e.g. mineral springs, local gourmet food products) and regional wine industry structure. The final objective was to identify successful wineries and to develop a predictive model that would enable winery operators to match their winery with a tourist profile in order to identify specific target markets.

The rationale of this project has been identified as research that was needed by some of the key State Tourism bodies and the Winemakers’ Federation of Australia. The principal research question examined was the following:

• How can a winery typology and a profile of the wine tourist be utilised in developing strategies for wineries and wine regions to attract and maintain wine tourists?

Further questions were:

• What are the different stages in development of wine regions and by what characteristics can they be identified?
• What are the major components of the wine tourism experience?
• What are the values held by the wine tourist?
• What motivates the wine tourist?

The findings from the first two questions are presented in this report, while the findings to the remaining questions are provided in a second report by Sparks (2006).

Methodology

A multi-method approach, utilising both qualitative and quantitative methods, was undertaken for this project. Four stages were involved. First, an extensive literature search was undertaken and secondary data collected from a range of sources including the findings of the STCRC ‘Good Living Tourism’ project that was recently completed. Second, a case study approach was undertaken by gathering primary data through in-depth interviews with key stakeholders in four regions in different stages of development (emerging, growing, mature and rejuvenating) in two Australian states. Regions were selected on the basis of their stage of development in consultation with the South Australian Tourism Commission, Tourism Victoria and the Winemakers’ Federation of Australia. These include regions in South Australia: Adelaide Hills (emerging), McLaren Vale (growing), Coonawarra–Limestone Coast (mature), and Barossa Valley (rejuvenating). Four regions in Victoria were represented: King Valley (emerging), Mornington Peninsula (growing), Yarra Valley (mature), and Rutherglen (rejuvenating). From these case studies a wine region typology was produced.

In order to gather the range of data required for the case study, in-depth interviews were conducted in each region with winery operators, representatives of regional food and wine associations, local tourism associations, and Visitor Information Centres. A range of small, medium and large wineries participated in each region.

Key Findings

The eight wineries were segmented into four development stages. The attributes that distinguished these stages are outlined below.

Emerging wine regions

• very strong natural attractions
Analysing key characteristics of selected Australian regions

- strong cultural heritage attractions within the immediate area
- a number of festivals and events attracting visitors to the region.

To varying degrees, the emerging wine regions lacked:
- a unifying theme (e.g. Mediterranean background)
- sufficient accommodation
- proximity to a major city (particularly Adelaide Hills).

**Growing wine regions**
- close proximity to major capital cities
- close proximity to natural attractions such as beaches and parks
- heritage aspects dating back to the early 1800s
- established range of events
- concentration of wineries that promote touring and wine tasting
- both regions described as ‘boutique’ wine regions.

**Maturing wine regions**
- situated inland
- well established wineries
- mainly cottage and B&B accommodation
- high heritage value
- a range of natural attractions.

**Rejuvenating wine regions**
- rural settings away from population centres
- strong heritage values
- established events
- diverse range of activities.

In conclusion, the growing and maturing regions appeared to have a successful combination of characteristics that assisted in their popularity as a wine and food destination. Key features were the proximity to a major capital city as well as to natural attractions—while the rejuvenating wine regions in the rural settings were disadvantaged by the ‘tyranny of distance’ and the need to capture new markets. Emerging wine and food regions tended to lack accommodation and present a unifying theme. These are obviously characteristics that needed to be developed.
FOOD AND WINE TOURISM

Chapter 1

BACKGROUND

This research project aimed to elaborate on the findings of the ‘Good Living’ Tourism project, which focused on opportunities to develop food and wine tourism in Australia. There is now a tourism industry trend towards promoting specific lifestyle advantages based on an experience that synthesises food and wine components invariably in a unique regional setting, (for example, Barossa Wine Tourism Product Manual, SATC 2003). The ‘Good Living’ project (STCRC 2005) identified clusters of issues, which can be broadly grouped into key themes on developing wine and food tourism from a consumer perspective. These included:

• food and wine experiences
• regional aspects
• experiential enhancement factors.

Critically, the enhancement factors identified some core values that consumers articulated concerning their impressions of food and wine regions. Some of these included authenticity (the uniqueness of the experience based on regional characteristics); personal growth (the opportunity to acquire new knowledge); the natural surroundings (the general soaking up of the ambience of the region); personalised service (the genuine customisation of service delivery and the regional interaction that provides) and the degree of product diversity available (consumers expressing a desire for a total lifestyle package).

Wine Tourism

Charters and Ali-Knight (2002) suggest that a definition of wine tourism should include the following types of characteristics: a lifestyle experience, supply and demand, an educational component, linkages to art, wine and food, incorporation with the tourism destination image; and, as a marketing opportunity which enhances the economic, social and cultural values of the region. These suggestions imply that wine tourism involves many facets and that the destination or region plays a key role. Further to the debate on the definitions, Hall, Johnson, Cambourne, Maconis, Mitchell and Sharples (2000) note that many authors have attempted to define wine tourism. These authors start with the definition of wine tourism as ‘visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors’ but add that, even extending the definition with ‘for the purposes of recreation’ does not ‘adequately convey the romance of the grape, winescapes and wine-producing regions that are so much a part of wine and wine tourism around the world’ (Hall et al. 2000 p.5). Limited studies have undertaken wine tourism segmentation that examines aspects of psychographic characteristics including values, attitudes and lifestyles of wine tourists (see Charters & Ali-Knight, 2002; Hall, 1996). Indeed, Hall and Winchester (1999) suggest that wine tourist segments can be defined according to the different product attributes desired by those segments of the population. Similarly, Charters and Ali-Knight (2002) identify variation in demography and psychographics between wine tourists visiting each region, and state that segmentation of wine tourists should be broad and will otherwise only assist wine tourism operators in a specific region.

Other researchers (Macioneis & Cambourne 1998) state that the majority of winery visitors are likely to be mature; engaged in full time employment and in the moderate to high income bracket; have a high degree of familiarity with the product; visit wineries or wine regions several times a year; and come from within the state or regional catchment area. However, they add that the profile and nature of the wine tourist can vary according to the product being offered, the maturity of the region, and the marketing being employed by the region. Williams and Kelly (2001) describe the socio demographic, purchasing and trip behaviours and activity patterns of visitors to wine regions and suggest the existence of wine tourist clusters with distinct geographic, socio-demographic and behavioural characteristics. These authors suggest that the identified traits of wine tourists can be generalised to other regions that are at a similar stage in their lifecycle.

Towards a Wine Region Typology

The wine industry appears to lack consistency in its definition of wineries. To a large extent, wineries are
Analysing key characteristics of selected Australian regions

categorised on size—the size of crush (ACIL 2002). Alternatively, wineries have been classified by market
focus. For example, a medium-sized winery may be one where the business can no longer depend on the cellar
door or mailing list for sales, and needs to enter the retail market. In developing a typology—or taxonomy-
Pearce (1991, p.46) argues the ‘definitional and taxonomic nightmare(s)’ confronting tourism scholars yet
emphasises the need to agree on a common definition if only for the collection of ‘core statistical information’.
However, in order to understand the types of wineries within Australia, a method of categorisation is required.

It is also possible to categorise wineries according to the tourist segments and based on socio-demographic
argues for three main categories. Firstly, the ideographic perspective which refers to the ‘unique elements of a
site and its general attributes such as culture, natural scenery, festivals and events’. The second category is from
the organisational perspective and refers to the relationship between one attraction (winery) and another
attraction within the same region. Finally, Lew discusses the cognitive perspective which categorises attractions
(wineries) as people perceive them. Each of these methods will be analysed within the project.

Aims of the Study

The major aim of this project was to identify existing data on the wine tourism experience and to build upon the
findings of the ‘Good Living’ Tourism project. The study aims to establish two end products that will enable the
wine regions and wineries to match their offerings/promotions with specific tourist visitation expectations. It
seeks to do this by providing detailed wine tourist profiles, in particular highlighting the values and motivations
informing their decision-making in choosing to visit wine regions. The project will also provide a wine region
typology, which will clarify the stage of development of the region. By doing this, it is hoped that the project
will lead to a better understanding of the relationship between the wine tourist and the wine regions/wineries
they choose to visit and to propose a match between wine region type and wine tourist profiles.

Objectives

There were several major objectives of this study. Firstly, to identify the components of the wine tourism
experience, expanding the repertoire beyond the wine itself to the supporting framework provided by the
wineries in particular and the region within which the winery is located. Secondly, to develop a profile of the
wine tourist, by extending the demographic and psychographic findings of the ‘Good Living’ Tourism project.
This objective has been covered in the second report by Sparks (2006). Thirdly, to develop a wine region
typology in terms of the region’s stage of development and geographical location and which may have other
attractions, for example beaches, mineral springs or local gourmet food products. Fourthly, to develop a
predictive model that will enable winery operators to match their winery within its wine region with a tourist
profile in order to identify specific target markets.

Benefits of the Project

Matching the wine regions and wine tourist profiles should enable better channelling of the wine tourists to the
wine regions and to wineries that have the appropriate infrastructure in place. The role of food and other ‘good
living’ attractions in wine tourism will also become apparent within the wine region typology and wine tourist
profiles. This will encourage greater cooperation between the food and wine sectors for their mutual benefit and
the benefit of the wine tourist.

The typology will enable wine regions to identify with other regions in a similar stage of development. In
addition, wineries will be able to recognise the competition, their points of difference from the competition and
also potential partners for collaboration, all of which will assist them in their marketing efforts. They will be able
to match their winery and their region with the most appropriate wine tourist profiles and so gain a better
perspective on their visitors and how they can be satisfied with the product they offer.

The channels will be more efficient through: better-informed marketing by State Tourism bodies, local
councils, tour/travel operators and information centres; better planning by industry associations, for example:
Winemakers’ Federation of Australia, Restaurant and Catering Associations as well as local food and wine
producers’ groups, local councils, tour/travel operators, wineries and other associated infrastructure businesses.
This in turn may lead to greater visitor satisfaction and hence positive word of mouth marketing. If regions/local
councils utilise and match the wine region typology and wine tourist profiles then infrastructure requirements
may be better estimated for the region/locality.
Chapter 2

LITERATURE AND CONCEPTUAL FRAMEWORK

Wine Tourism

Industry research
There are a number of studies that have investigated the motivation and activity level of wine tourists. For example, the South Australian Tourism Commission’s Cellar Door Market Research (2003) found the key reasons for visiting a wine region were not focused solely on either being in a wine region (86%) or tasting/buying the wine (81% and 63%). The research indicated that consumers visited wine regions in South Australia primarily to relax and unwind (91%), to experience the regional setting and scenery (83%) and to spend quality time with their partner (73%). Quality restaurants were also important (59%); heritage (44%) and nature (41%) were other factors contributing to the motivation to visit the wine areas.

The Wine Federation of Australia (WFA) has also conducted research resulting in the publication of a guide for winery operators entitled Wine Tourism Uncorked (2004). Twenty-four wineries were chosen from six states around Australia, representing a diversity of regions, for case study analysis. The wineries were chosen because they had been identified through tourism awards as being tourism-oriented. Some key issues have emerged from these case studies, which indicated the factors that are required to generate an effective wine tourism experience. These can be broadly summarised as:

- location—first impressions
- authenticity—consistency with brand and regional values
- signage—branding, effective directions, good placement, quality
- physical appearance—well-maintained, stylish, landscaping, carpark
- cellar door appearance and facilities
- service orientation through skilled staff
- lifestyle add-ons—tours, wine and food, galleries, merchandise
- restaurants/cafes and/or accommodation
- event management
- building tourism relationships.

These findings confirm those made by Sparks et al (2005) in the STCRC ‘Good Living’ Tourism project and those of Alant and Bruwer (2004) in their study of the Coonawarra and McLaren Vale wine districts.

In general, the WFA publication promotes a shift in mindset to accommodate tourism as part of the wine industry instead of viewing the industry purely from an agricultural production standpoint. It details the expansion of wineries into food and accommodation delivery. For example, in 2003, of the 1288 wineries in Australia with a cellar door, 364 had a restaurant or served light meals and 174 had accommodation onsite (WFA 2003). South Australia lags behind all other states in terms of restaurant or light meals provision. While New South Wales, Victoria and Western Australia all hovered around 30% of wineries providing such facilities, Queensland leads substantially with 62% while South Australia had only 23%. Queensland also led in the amount of accommodation with 25% providing this facility, followed by New South Wales with 19% and the other states with 10% (Winetitles 2003, cited in WFA 2003). In their paper Sparks, Wildman and Bowen (2001) investigate the role of restaurant experiences in contributing to the overall attractiveness of a destination. They suggested that a tourist’s overall satisfaction level with a destination is linked substantially to their restaurant experiences there. They identified seven industry trends including an increased focus on local produce and regional cuisine and the increase in ‘shorts’ style breaks with a food and wine indulgence promoted as ‘relaxing’. They also suggested that Australia was rapidly becoming a food destination for tourists.

In addition to the growing number of restaurants located at wineries, both active and passive pursuits of leisure activity have increased to provide a complete lifestyle break. These include riding horses or bikes, reading and walking, and visiting sights, lookouts and culture as well as wining and dining in rural settings.

Research by Brandmeir (2004) examined the benefits of winery restaurants and other activities as part of wine tourism by way of three examples. Of particular relevance to this section is the Vasse Felix story from Margaret River in Western Australia. The writer gives a brief history of the winery and outlines how strategic horizontal diversification was increased to develop a viable wine tourism product. Vasse Felix commenced operations in 1971, and in 1988 added a restaurant to complement its cellar door. The menu reflects a regional
Analysing key characteristics of selected Australian regions

and seasonal focus and added extra revenue to the winery’s cellar door operations. Subsequently an art gallery was added to further enhance and enrich the cellar door experience for the wine tourist, as this was deemed to be compatible with their core business. Vasse Felix now receives substantial local, national and international visitors and has a well-established brand profile. It has positioned itself as a multi-functional offering and consequently its visitation numbers have increased significantly. At the time of the art gallery inception the winery was receiving 50,000 visitors a year with the hope that the new development would increase numbers to 70,000. By the year 2000 this was realised and by 2002 the winery received 102,000 visitors, a doubling of numbers since the gallery opened.

Towards a wine region typology

Little has been written directly in this area either by industry or from academic research. Some of the following information provides insights into the direction that this research needs to take. Aspects of wine region typology or mapping have been undertaken with attempts to provide tourists with some detailed information both of the region and individually about the wineries themselves. However, this has not occurred in any systematic way. Currently, there would appear to be a need for a typology that is in some way accredited.

To that end, Jago (2001) cites the Victorian Wineries Tourism Council’s (VWTC) initial forays into the area of accreditation—Victoria is the only state to have applied a general tourism concept to cellar doors. The notion of building cellar door expertise through an ongoing system of accreditation emerged from an awareness of increasing visitor complaints about the cellar door experience. John Ellis, winemaker of Hanging Rock provides an interesting insight in stating that:

*If you haven’t got the right staff then it’s left to you, which can be incredibly invasive on your time and private life. The winemaker or vigneron shouldn’t try to be the public face of the winery, because it simply won’t work.* (WFA 2004)

Indeed, in the ACIL report (2003) one winemaker noted that ‘every glass poured at the cellar door over the years has been incremental brand building’ and another, ‘it’s not just about the wine-tasting but about providing a whole experience to make a visit memorable…’ In other words, these winemakers fully appreciated the marketing value of a good cellar door experience.

This, however, highlights the difficulty that many small and boutique wineries in Australia face. As detailed by Beverland and Lockshin (2000) in their study of wineries as organisational life-cycles, they show that moving from the start-up phase through expansion to growth phases for a winery requires a distinct marketing orientation to facilitate growth. In reality, most winemakers are primary industry producers and are not well-versed in, or adept at, implementing tourism practices. In addition, the financial stability of the winery also impacts on the level of customer service to be provided at the cellar door and many put off making necessary investments in this area.

Dodd and Beverland (2001) suggest that wine tourism needs to be perceived through the lens of a life-cycle. This cycle can impact on wine regions as a whole, but can also be applied to individual wineries. Their model suggests that the various stages are:

- winery establishment—focus on production
- winery recognition—focus on industrial tourism
- regional prominence—tourism development
- maturity—destination management through events, festivals, etc.
- decline—over-supply of tourists, backlash from community, tired facilities.

They suggest that, in the future, wine tourism will become more competitive and may not necessarily be correlated to cellar door sales, which may represent only a small part of total sales/revenue. Events continue to enhance brand and the destination choice. Dodd and Beverland (2001) also note that in the later stages of the cycle, wine drinker segments shift from aspiration/connoisseurs to standard beverage drinkers (e.g. mass tourism) and this in turn can lead to greater community resentment unless the area is rejuvenated in some way. The Napa Valley is cited as one region that was declining due to tourist oversupply, but a new tourist management plan has shifted the focus from quantity to quality and arrested the decline phase to some extent.

One other study adopts a like approach but to the evolution of wine events in particular. Hoffman, Beverland and Rasmussen (2001) examined different festivals in Australia and New Zealand from four years old through to 27 years old. Not surprisingly, they found the younger festivals in launch and growth phases (Harvest Hawkes Bay, Wine Marlborough) while the Bushing Festival at McLaren Vale was in decline (27 years old). Interestingly, they pointed out that at some stage in the festival/events cycle a crisis was reached and this in turn sparked a revival or even a rebranding. One such event, Vintage Al Fresco in West Auckland had already been through this crisis despite the event being only 13 years old. The life-cycle suggests that, similar to product
cycles, new visions for the event need to be formalised before the decline is too far gone to be retrieved. Does the same apply to wineries and wine regions and what are the implications for wine tourism?

Data relevant to the development of a winery typology are limited in scope. For example, statistics on vintage crush, products offered, cellar door opening times and winery tour availability are well documented. However, other aspects remain less well represented, for example, restaurant and café availability, picnic area, winery aesthetics, cellar door facilities/ambience, children’s activities, merchandising and other products for sale as well the opportunity to meet the winemaker.

Research conducted by Sanders (2004) details cellar door facilities at Margaret River wineries showing some of the aforementioned categories, but this appears to be a rather isolated example in the literature. Beames (2003) suggests that the wine industry, by remaining ‘product’ focused, has not capitalised on wine tourism and states that a cellar-door orientation is too limited. He suggests that there should be ongoing development of resort-style facilities, related local products, wine and food trails and other events to complement food/wine festivals.

The following discussion provides an overview of the conceptual framework used to develop the wine region typology. This is then followed by a brief discussion of the research sites.

Conceptual Framework

Regional identity
A good knowledge of the region’s tourism assets and the extent to which they match visitor needs is essential for tourism planning and marketing. Hence, another objective of this study was to determine available resources and strengths of each wine region. Ritchie (1993) has stressed the importance of developing a vision for a destination or, in the case of this study, a region, in terms of ‘what it can or should seek to become as a tourist destination’ (p. 381). In the development of a vision for Calgary in Canada the vision was examined from several perspectives: facilities; events; and programs required to realise the vision. For each of these three perspectives a segmented circle of strategies was produced around the central vision with the facilities/events/programs identified outside the rim.

Regional segments
Resources that can be identified within wine regions that help to characterise the identity of the region and may constitute segments within the circle include location/proximity to a major city, the wineries and the wine produced, primary food production and food service, accommodation, the environment including natural attractions in the landscape, marine/coastal aspects of the environment, heritage of the region, culture and the arts in the region, sports and adventure activities available and finally a segment for other attractions that do not fit into the aforementioned themes. Although there are differences between these segments and those identified by Ritchie (1993) in his seminal attempt to develop a tourism vision for Calgary, the process he used for identifying the assets and strengths of Calgary has been applied and adapted for this study as shown in Figure 1.

In addition, this study focuses on the collaborative aspect by taking into account the various networks and networking activities which support the vision of a regional identity.

Figure 1: Regional segments (Adapted from Ritchie, 1993)
Network categories
Hall, Johnson and Mitchell (2000) noted the importance of networks created between stakeholders for collaboration in reaching common goals for a region. They applied the network categories of Hall et al. (1998) to wine tourism that represent both the flow of business information and also of tourists within a region. Not only do such networks assist in the pooling of resources for regional promotion, but they also lead to greater interaction between businesses. Networks have many benefits including complementarities with other products, joint promotions and reciprocal business links (Gammack 2004). Networking is important for the creation of a knowledge infrastructure within a region and also for the dissemination of information both within organisations and throughout the region. The following proposal for evaluating the networks in wine tourism regions is based on the work of Hall et al. (1998) and Hall et al. (2000). Their four categories of networks are business dyads, organisational sets, action sets and tourism networks. These have been adapted to reflect the structure of networks in food and wine regions. They are each discussed below and then assembled for the purposes of this research in Figure 2.

Tourism networks
These can be a group of organisations with common links such as a federation or association, for example Winemakers’ Federation of Australia or the North Eastern Victorian wine regions.

Action sets
These occur where there is ‘a coalition of interacting organisations’ working towards common goals such as the development of a regional promotional campaign. The latter may involve independent business operators within the region including operators of wineries, restaurants, accommodation operators and attractions as well as regional visitor information centres, the local tourism association, vigneron associations and food groups. Such sets may also include organisers of festivals and events in the region.
Organisational sets
These are formed when there are links between organisations clustering together with leadership from a ‘focal organisation’. For example, a visitor information centre may create such a cluster by forming dyads with many tourism businesses including wineries, restaurants, accommodation providers, attractions etc for the purpose of providing tourists with information.

![Organisation Sets](image)

**Figure 4: Organisational sets**

Business dyads
Dyads are formed when two businesses are collaborating for mutual benefit, for example a winery and a tour company working together for mutual benefit. A business relationship formed between a visitor information centre and an individual business is also an example of a dyad.

![Dyadic Linkage](image)

**Figure 5: Dyadic linkages**

This multi-level concept of regional identity is represented in the regional framework (see Figure 6 to follow) from which the various components are discussed in the following sub-sections.
Analysing key characteristics of selected Australian regions

Tourism Networks
- State Tourism Association
- State Wine Region Association
- Winemakers’ Association of Australia

Organisation Sets
- e.g. Visitor Information Centre
  - Winery, Tour Operator, Local Attraction
  - Accommodation

Figure 6: Regional identity

The main barrier to successful networking appears to be “information gaps” where the benefits of such cooperative activity may not be recognised by the stakeholders (Hall et al. 2000). By collating information about regional resources and networks these ‘information gaps’ may be identified and so efforts can be made to fill them, which in turn may lead to greater understanding and an increase in cooperative activity.

The following brief discussion of the wine regions within the Australian states of Victoria and South Australia provides the context for the current research into wine tourism.

The research sites
The development of the wine tourism industry in Australia has been supported at the national, state and regional levels and tourism data reflect this. The Bureau of Tourism Research, Wine Federation of Australia and all state tourism bodies have developed wine tourism papers based on visitation numbers to wine regions. However, the findings do not appear to be consistent and may reflect different data collection methods used by the various organisations (for example, Tourism New South Wales estimated 4.1 million visits to New South Wales wineries in 2001, whereas the WFA, based on BTR data in 2002 estimated only 1.2 million visitors to New South Wales wineries). There is clearly a need to set standardised data collection processes in place nationally.

Victoria
Tourism Victoria estimated from a survey conducted in 2002 that total winery visitation for 2002 had risen to approx. 3.25 million—a doubling of visitors since 1994. The origin of visitors was overwhelmingly Melbourne (57%) with regional Victoria adding another 19%. Clearly regions such as the Yarra Valley and Mornington Peninsula do well due to their close proximity to Melbourne. Victoria also receives a large proportion of international visitors with 208,966 in 2002 (BTR International Visitor Survey). In the following year, 2003, Tourism Victoria conducted a Cellar Door survey which showed regional visitation levels of 48% for the Yarra
Valley 36% for the Mornington Peninsula and 18% for Rutherglen wine regions.

In discussing the characteristics of wine regions, Roberts and Deery (2004) compared the development of wine and food tourism in two regions of Victoria, the Yarra Valley and Macedon Ranges. The findings indicated that there is a lack of substantial accommodation infrastructure in the Yarra Valley and that the Macedon Ranges has not achieved brand status in people’s perceptions as a wine region. Macedon Ranges and the Spa Country is understood as being a general lifestyle choice of relaxation and indulgence. The main food group in this area—the Daylesford Macedon Produce group—indicated that there were a number of challenges in order to raise the level of awareness about the region’s wine and food capabilities; while the Yarra Valley Regional Food Group was firmly established, had developed a food trail and has a regional farmer’s market. The region is clearly identified as a food and wine destination, with quality wine, value-added food production and high-level culinary experiences in an event-laden annual calendar.

**South Australia**

The South Australian Tourism Commission has conducted some of the most extensive research by a state body into wine tourism and has released two reports (2000 and 2003) which give initial indications of longitudinal trends for specific wine regions in terms of visitation numbers, cellar door visits and visitor nights (accommodation). According to these reports the data indicated an increase in overall visitors to wine regions and in particular a rise from 4 million cellar door visits to 4.75 million visits across the state. However, it is clear that some regions have fared better than others between the two surveys in terms of building wine tourism. The implications are that wine regions are at different stages of development in their wine tourism journey.

The Barossa Valley appears to have stabilised in its visitation numbers with cellar door visits remaining static (2.4 million). The number of visitor nights had increased but this appears to be largely due to longer stays by international visitors (up to 35 nights). This can be attributed to international winemakers coming to experience a Barossa vintage and backpackers employed in grape-picking. The number of visitor nights for interstate travellers, however, fell from an average of 12 nights in 2000 to 7.7 nights in 2003, a drop of some consequence.

Clare Valley suffered a more marked fall in numbers between the two surveys suggesting that the regional branding of this area is not resonating with wine tourists. Lane and Brown (2004) suggest this was due to the limited size of wine production. This could also translate into the relative lack of a strong brand presence in retail outlets. The number of cellar door visits fell from 668,000 to 444,000 and visitor nights dropped from 90,000 to 59,000 with more tourists making the Clare Valley a day trip. This was highlighted with a fall in South Australia overnight stops from 3.8 to 2.5 nights. Clare has one of the oldest food and wine events in the country—the Clare Gourmet weekend.

The Fleurieu region was, on the other hand, a successful region over the period registering a doubling of visitors and cellar door visits. Most of the extra visits, however, were day-trippers which reflect the region’s close proximity to Adelaide.

The Limestone Coast, including the Coonawarra region, also showed a substantial increase in visitation with cellar door visits growing from 287,000 to 479,000 and visitor nights doubling. The international brand presence of Coonawarra was highlighted with 41% of overnight visitors nights being international.

The Adelaide Hills remained static in visitation numbers (50,000) although cellar door visits did increase from 75,000 to 90,000. However, with only 2.3 cellar doors per visit, the Adelaide Hills may not be perceived as being primarily a wine region. It is however, the youngest wine region in South Australia.

A detailed analysis of the future direction of South Australian wine tourism by region is provided by Lane and Brown (2004, p. 21). They point out that there is a marked discrepancy between the performance of wine regions in wine tourism activities and suggest that this is due to the lack of a comprehensive state-wide strategic plan to promote wine tourism.

> All South Australian State tourism plans have skirted around addressing the need to develop wine tourism specifically, rather they have set out to create elements of the wine tourism experience, without attempting to bring all the elements together...

Thus, Lane and Brown (2004) deduce that these regions in South Australia are all at different stages of development in wine tourism. Clearly, the Barossa region represents the mature end of wine tourism development in South Australia, while the Adelaide Hills is at the other end being largely unknown. The Barossa region is an internationally recognised brand and is heading towards iconic status in terms of ‘new world’ wine regions. This can be attributed to success internationally at both the boutique top end of the market and high prominence of commercial wines, for example brands such as Jacob’s Creek. Other factors are identified as being significant to the Barossa region’s attraction including scenery, restaurants and cafes, historic towns and buildings, arts and crafts and cultural heritage. (SATC Research Group 2001b cited in Lane and Brown 2004).
The Barossa region, in particular, has a strong food connection with the brand ‘Barossa Food’ which devotes itself to promoting local produce. Sparks, Roberts, Deery, Davies and Brown (2004) note the development of regional food and wine tourism through local entrepreneurs and that the Barossa has been fortunate in having two—Margaret Lehmann and Maggie Beer.

The Fleurieu region has experienced an increase in the number of visitors but the majority of these have been day-trippers. This is hardly surprising given its close proximity to beaches, new residential developments and its relative closeness to Adelaide. McLaren Vale and surrounds are not seen to be offering a comprehensive wine tourism package. However, events such as the Sea and Vines festival have sought to promote McLaren Vale as a credible food and wine destination. The region has not enjoyed an entrepreneur of the status of a Maggie Beer or Suzanne Halliday to fully realise this potential (Lane & Brown 2004), however the region is actively pursuing a stronger branding of food and wine through the Fleurieu Peninsula Food group for which Pip Forrester has been a strong advocate.
Chapter 3

METHODOLOGY

This section provides the details of the methods used in order to address the principal research questions:

- How can a wine region typology and a profile of the wine tourist be utilised in developing strategies for wineries and wine regions to attract and maintain wine tourists?
- What are the different stages in development of wine regions and by what characteristics can they be identified?

The overall approach was to utilise secondary data collection and undertake in-depth interviews with a range of stakeholders within the two selected states, Victoria and South Australia.

A number of phases were used in undertaking this research. Firstly, an extensive literature search was undertaken and secondary data collected from a range of sources including the findings of the STCRC ‘Good Living’ Tourism project that has recently been completed.

Secondly, a case study approach is being taken with the gathering of primary data through in-depth interviews with key stakeholders in four regions in different stages of development (emerging, growing, mature and rejuvenating) in two Australian States. The regions have been selected on the basis of their stage of development in consultation with the South Australian Tourism Commission, Tourism Victoria and the Winemakers’ Federation of Australia. These are:

South Australia
- emerging—Adelaide Hills
- growing—McLaren Vale
- mature—Coonawarra (Limestone Coast)
- rejuvenating—Barossa Valley

Victoria
- emerging—King Valley
- growing—Mornington Peninsula
- mature—Yarra Valley
- rejuvenating—Rutherglen

These regions are shown on the following map in Figure 7 below.

Figure 7: Location of wine regions in different stages of development

Thirdly, a quantitative survey of wine tourists involving further development of the survey questionnaire
Analysing key characteristics of selected Australian regions

Developed for the ‘Good Living’ Tourism project was undertaken. From this survey a wine tourist profile will be produced. The findings from this phase of the study can be found in Sparks (2007). The method used is illustrated in the following flowchart, Figure 8.

**Figure 8: Method flowchart**
Stage One Secondary Data Collection

For Stage One a wide range of secondary data was searched. This included data available in the public domain from research literature databases to state tourism organisations, ABS sources, the WFA, brochures and information sheets from local councils and visitor information centres and a range of Internet resources like Wine Titles and Wine Diva.

Stage Two Wine Region Case Studies

For Stage Two in order to supplement, confirm and extend the range of data required for the case studies, in-depth interviews were conducted in each region with a range of winery operators, representatives of regional food and wine associations, local tourism associations, and visitor information centres. A judgment sample was selected for the interviews. This task was accomplished with the assistance of key stakeholders from the WFA, the two participating state tourism organisations and the regional tourism and vigneron’s associations to identify representative respondents. The face-to-face interviews with the winery operators and a small number of association representatives were undertaken in the period April to June 2005. The remaining association representatives were interviewed by telephone. Overall a total of 47 interviews were completed (see Table 1).

A semi-structured qualitative questionnaire was prepared for the interviews with the winery operators while a series of open-ended questions were used for interviews with the representatives of tourism, food and wine associations (see Appendix B). Notes were taken by the interviewer and the interviews were also tape recorded and the recordings transcribed. Data analysis was undertaken using the method of data reduction as for phenomenological research in which themes and sub-themes were identified.
### Table 1: Interviews of Key Stakeholders in the Wine Regions

<table>
<thead>
<tr>
<th>Regional Characteristic</th>
<th>Quantity/Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>King Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>20</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>10 (50%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>5</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>3</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>4</td>
</tr>
<tr>
<td><strong>Adelaide Hills</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>62</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>26 (42%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>&gt;70</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>18</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>8</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>5</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>1</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
<tr>
<td><strong>Mornington Peninsula</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>40</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>36 (90%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>19</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>23</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>17</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>12</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>16</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
<tr>
<td><strong>McLaren Vale</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>89</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>60 (67%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>44</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>6</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>26</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>9</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>10</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>15</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
<tr>
<td>Regional Characteristic</td>
<td>Quantity/Percentage</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td><strong>Yarra Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>61</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>47 (77%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>29</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>21</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>18</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>9</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>25</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>3</td>
</tr>
<tr>
<td><strong>Coonawarra</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>31</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>24 (78%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>17</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>2</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>1</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>1</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>8</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>0</td>
</tr>
<tr>
<td><strong>Rutherglen</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>17</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>15 (88%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>13</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>1</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>11</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>9</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>2</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>16</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>1</td>
</tr>
<tr>
<td><strong>Barossa Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>88</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>49 (57%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>35</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>8</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>16</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>10</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>5</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>28</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
</tbody>
</table>
Analysing key characteristics of selected Australian regions
Chapter 4

RESULTS

Overview
The purpose of this chapter is to consolidate the findings from the in-depth interviews of winery owners and operators and other key wine region stakeholders together with the secondary data already collected. A major aim of this stage of the research was to confirm the secondary data and to elicit more detail about wine regions and wineries in the developing categories of the typology. In addition to winery owners and operators, key wine region stakeholders were interviewed from state tourism organisations, local councils/shires and visitor information centres, as well as local tourism, food and wine groups. For each of the eight regions under investigation the information obtained from both winery operators and key region stakeholders was used to assemble an overview of the characteristics of each region, in terms of its resources.

Region Sample
As discussed previously, eight regions from Victoria and South Australia in different stages of development were selected for analysis with the aid of the WFA and the relevant state tourism organisations. The wine regions were:

Victoria
- King Valley (KV)
- Mornington Peninsula (MP)
- Yarra Valley (YV)
- Rutherglen (RT)

South Australia
- Adelaide Hills (AH)
- McLaren Vale (MV)
- Coonawarra (CO)
- Barossa Valley (BV)

Each region has unique attributes and one purpose of this research was to identify the resources that contribute to each region’s stage of development.

The following is an in-depth qualitative analysis of the eight regions. In each section, a brief description of the region is followed by aspects of the region discussed by participants (the location of the region and its environment, its history/heritage, products, services and facilities offered, activities and other attractions available in the region, region structure, affiliations and networks). Each section concludes with several sub-sections comparing the views of participants from various groups (winery owners and operators, food and wine groups, state tourism organisations, councils/shires and local government, visitor information centres). A summary of information about basic services for each wine region is included in Table 2.
Table 2: Wine Region Summary

<table>
<thead>
<tr>
<th>Regional Characteristic</th>
<th>Quantity/Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>King Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>20</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>10 (50%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>5</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>3</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>4</td>
</tr>
<tr>
<td><strong>Adelaide Hills</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>62</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>26 (42%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>&gt;70</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>18</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>8</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>5</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>1</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
<tr>
<td><strong>Mornington Peninsula</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>40</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>36 (90%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>19</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>23</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>17</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>12</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>16</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
<tr>
<td><strong>McLaren Vale</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>89</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>60 (67%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>44</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>6</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>26</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>9</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>10</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>15</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
</tbody>
</table>

Source: Regional Brochures 2006
Table 2: Wine Region Summary (cont.)

<table>
<thead>
<tr>
<th>Regional Characteristic</th>
<th>Quantity/Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yarra Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>61</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>47 (77%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>29</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>4</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>21</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>18</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>9</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>25</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>3</td>
</tr>
<tr>
<td><strong>Coonawarra</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>31</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>24 (78%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>17</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>3</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>2</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>1</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>1</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>8</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>0</td>
</tr>
<tr>
<td><strong>Rutherglen</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>17</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>15 (88%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>13</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>1</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>11</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>9</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>2</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>16</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>1</td>
</tr>
<tr>
<td><strong>Barossa Valley</strong></td>
<td></td>
</tr>
<tr>
<td>Wineries or vineyards in region</td>
<td>88</td>
</tr>
<tr>
<td>Wineries or vineyards in region with cellar door</td>
<td>49 (57%)</td>
</tr>
<tr>
<td>Accommodation providers in region</td>
<td>35</td>
</tr>
<tr>
<td>Wineries or vineyards with accommodation</td>
<td>8</td>
</tr>
<tr>
<td>Restaurants in region</td>
<td>16</td>
</tr>
<tr>
<td>Vineyard with restaurants in region</td>
<td>10</td>
</tr>
<tr>
<td>Restaurants with function facilities in region</td>
<td>5</td>
</tr>
<tr>
<td>Tour companies based/operating in region</td>
<td>28</td>
</tr>
<tr>
<td>Tourism organisations in region</td>
<td>2</td>
</tr>
</tbody>
</table>
Emerging Wine Regions: King Valley (Victoria)

Overview
The King Valley, which is situated in the north east of Victoria, is an increasingly important grape growing region. The varied terrain encompasses the Oxley Plains in the foothills of the Alps and is close to Wangaratta, Beechworth and Bright. The region was predominantly worked by Italian tobacco farmers who switched to grape growing in the 1970s when Guy Darling and John Levigny planted vines. Brown Brothers subsequently bought the grapes and has remained an important buyer and landholder since.

The region is one of the highest altitude wine grape growing areas in Australia and is fertile country, producing high yields of good quality grapes. The King Valley has approximately 1100 hectares of red wine grapes and 400 hectares of white wine grapes planted including cabernet sauvignon, merlot, shiraz, cabernet franc, pinot noir, and many others. The region is also a supplier to a number of wineries in South Australia, Victoria and New South Wales. There are numerous local products such as Milawa cheeses, mustards and olives, and a small number of restaurants and accommodation ranging from five-star hotels to bed and breakfast properties (B&Bs). There are twenty wineries in the region, mostly of a boutique size and with cellar doors. Many of the growers in the King Valley are Italian or of Italian parentage and the local culture and food producers are strongly influenced by this. Italian grape varieties flourish here.

Regional structure
Ten of the 20 wineries/vineyards found in the King Valley region have a cellar door. Apart from Brown Brothers, the majority of the wineries are small to medium sized operations, many of which are also family-owned. Accommodation is sparse in the region with only five accommodation providers. Three of these are wineries/vineyards that offer accommodation. There are small numbers of restaurants and function facilities in the King Valley region. Four tour companies operate.

Regional resources
The majority of stakeholders interviewed for this study were of the opinion that food and wine, whilst perceived as key strengths of the area, were not the only reason visitors travelled to the region. The region’s heritage and natural attractions were often cited as the other main motivations for travellers visiting the area. The King Valley wine region is promoted under Tourism Victoria’s ‘Legends, Wine and High Country’ and, as a result, is marketed in conjunction with Rutherglen, one of the oldest grape growing wine regions in Australia. The location of the King Valley is certainly a key asset for the region and helps mark out the region as one which provides nature-based activities and has close links to significant events in Victorian history. Thus, core perceptions of regional identity in addition to food and wine revolve around the nature of the location (proximity to natural attractions, flora and fauna), heritage attractions and nature-based activities.

Regional segments

Proximity to major population centres
The King Valley is situated a 2.5 hour drive north of Melbourne and 30 minute drive south of Wangaratta.

Wineries and wine produced
The diversity of wine produced is a key asset in the region, with an emphasis on Mediterranean grape varietals—for example: Barbero, Nebbiolo, Sangiovese, Arneis and Mezzamino. Although Brown Brothers in Milawa has had, and continues to have, the highest profile of the wineries in the region, King Valley’s reputation as a region that has a diverse range of wine styles is growing.

The boutique quality of the wineries also adds to the ‘warm hospitality’ often associated with family owned and operated wineries. As one winery operator commented, ‘There is a common thread with people who come to our cellar door: they like to go to small places and they come to talk to the winemaker’.

Primary food production and food service
Milawa and Oxley, situated at the northern end of the King Valley, are at the centre of the Milawa gourmet region. Conceived in 1994, the gourmet region has an emerging cluster of cosmopolitan cafés and restaurants. The region is also known for the production of award-winning cheeses, speciality bread and mustard, as well as olives, berries, honey, jam and preserves. Regional food experiences offered include:

- High Country sampling of local food
- Milawa Cheese Factory, Bakery and Restaurant
• Epicurean Centre at Brown Brothers Vineyard
• Traditional pub meals
• Legends Wine and High Country
• ‘Simone’s of Bright’ (chef’s hat rating)
• The Bank Restaurant
• Green Shed Bistro in Beechworth.

** Accommodation **
Although the King Valley does have a selection of B&Bs and a caravan park, the region has relatively little accommodation, especially in comparison to an emerging wine region like Adelaide Hills. Three wineries (Chrismont, King River Estate and Pizzini) offer accommodation.

** Natural attractions **
The North East of Victoria is renowned for its natural scenery, flora and fauna. The King Valley is in close proximity and provides easy access to a number of natural attractions. The region is close to 13 national and state parks including Victoria’s oldest park, Mount Buffalo National Park, and the largest of them all, the Alpine National Park. As such, the area also presents many opportunities to engage in outdoor activities. For example, the Murray to the Mountains Rail Trail and The Great Alpine Road touring route both take in the beauties of the area.

** Marine/coastal aspects **
This is not applicable for this region, although the King Valley is flanked by the King and Ovens Rivers.

** Heritage **
The region’s heritage is reflected in the buildings, streetscapes, mountain huts and scattered memorials found in picturesque townships throughout the area. The attraction of the region as a heritage site, is closely linked to the history and folklore surrounding two Australian identities: the Australian bush poet AB ‘Banjo’ Paterson’s The Man From Snowy River, and bushranger Ned Kelly (1855–80), who roamed the high country foothills in the late nineteenth century.

** Culture and the arts **
The major cultural activities in the region are events. Weekend Fit for a King, which is held over the Queen’s Birthday weekend and La Dolce Vita, held in November, are the two main festival events generally associated with the region. Other events and festivals include the Wangaratta Festival of Jazz, The Shed Wine Show and also the Brown Brothers’ Festival. Other local annual events include the Wangaratta Rural Expo held in February, the Stitched Up Textile Festival held in June to July each year and the Trails, Tastings and Tales—‘In Search of Australia's Most Wanted Wines’, which is also held in June. Local attractions include the Australian Country Spinners’ wool shop, whilst the Wangaratta Theatre Season runs from February to October each year.

** Sports and adventure activities **
Sports and adventure activities are closely related to the natural environment. Sports include a diverse range of activities from trout fishing to white water rafting as well as cycling and bush walking.

** Other attractions **
Other attractions in the King Valley are the Great Alpine Road and the Black Range Trout Farm.

** Affiliations and networks **

** Winery owners and operators **
There are two wine groups in the region. The King Valley Vignerons Association, previously known as the King Valley Grape Growers Association, was first formed in 1983. As the change in name indicates, the group was predominantly a grape growers association, but now represents a larger proportion of winemakers. The Association has approximately 106 members.

Wines of the King Valley is an organisation that is just over one year old, and represents 19 vigneron in the region. Wines of the King Valley focus on marketing, with the sole objective of raising the awareness and quality profile of the King Valley as a wine region. The group, which is run by a full-time marketing person, relies on member levies for funding. However, the group has secured some event funding from the Rural City of
Analysing key characteristics of selected Australian regions

Wangaratta and also from Tourism Alliance Victoria’s Country Victoria Events Program. Wines of the King Valley also have a seat on the board of the North East Valley Food & Wine Group. Apart from the production of a comprehensive brochure, Wines of the King Valley also use a Visiting Journalists’ Program to promote the region. The Group also run the two major wine and food events, Weekend Fit for a King and La Dolce Vita.

Food and wine groups
The King Valley Tourism Association (KVTA) represents a wide ranging group of about 55 wineries, food producers and general tourism businesses. Most members of this group are also members of the Wines of the King Valley and the King Valley Vigneron Association. KVTA has received funding for various programs from the local council, the Rural City of Wangaratta.

Visitor information centres
The Visitors’ Information Centre, which is situated in Wangaratta, is one of the key links in promoting the regional brand. The Rural City of Wangaratta, which operates on limited resources and thus spends little money on paid advertising, promotes the North Eastern region through the Visitors Information Centre (VIC). The Centre also manages the brochure stocks of the Wines of the King Valley group and ensures that the other VICs in the North East have available stock.

Councils, shires and local government
The Rural City of Wangaratta (Tourism Development), of which North East Valleys Council is a one third partner, is involved in cooperative marketing with the other shires of Alpine and Indigo. For example, ‘The Three Shire PR Project’ and ‘The Murray to Mountain Rail Trail’ are jointly resourced through these two shires.

State tourism organisations
Tourism Alliance Victoria has provided financial support to the region through their Country Victoria Events Program.

Relationship structure
From a wine tourism perspective, wine operators expressed the importance of a cohesive approach in that each winery should complement other wineries in the region:

> People aren’t going to drive hours to one winery or whatever; they come here because they can spend some time and go to many wineries. We don’t view the other wineries in the district as opposition, we see everyone as contributing to the overall total experience.

The network structure in the KV region is a fully collaborative one between the groups outlined above. At an organisational level, this is best summed up in the thoughts of one of the stakeholders interviewed for this study:

> There are three groups out there: The King Valley Vigneron Association, Wines of the King Valley and King Valley Tourism Association ... it used to be quite segregated out there I think, but I see them now as coming together much more than they ever have and are working very closely together, so that’s a great breakthrough.

The region’s networking structure is further validated by the views of another key stakeholder who recognises that ‘wine tourism does not exist in isolation from any other form of tourism’. The region’s status as an emerging wine region in itself can be seen to play a pivotal role in the visioning of the regional identity and the ways in which it is spoken about:

> The excitement within the trade and some sections of the consumers is the recognition that the King Valley is an exciting new region. Things are happening. There are good quality wines coming out of the region and it’s been easy to get wine writers here, they’ve been keen to come and talk about it.

The Wines of the King Valley is a relatively new arrival into the King Valley’s network structure and has assisted in ensuring that the region adopts a fresh approach to marketing that is in keeping with its emerging status. As one of the marketing taglines for the region indicates, ‘diversity, innovation and excitement’ are now the main themes around which the region is slowly gaining recognition. While collaboration remains an important factor in successfully promoting a region, collaboration also means that issues can also be addressed separately and more effectively. In the King Valley, for example, Wines of the King Valley can concentrate its efforts on marketing the region while the King Valley Vignerons Association takes up the complex issue of geographical boundaries.
In summary, the groups and organisations can be assigned to Hall et al.’s (1998) four categories as shown in Table 3.

### Table 3: King Valley Relationship Structure

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winemakers Federation of Australia</td>
<td>Weekend Fit for a King</td>
<td>VIC +</td>
<td>For example, local winery and</td>
</tr>
<tr>
<td>KV Tourism Association</td>
<td>La Dolce Vita</td>
<td>Wineries +</td>
<td>Milawa Cheese</td>
</tr>
<tr>
<td>Rural City of Wangaratta</td>
<td>Jazz festival</td>
<td>Accommodation +</td>
<td></td>
</tr>
<tr>
<td>NE Valleys Council</td>
<td>Wines of the King Valley</td>
<td>Local Attractions</td>
<td></td>
</tr>
</tbody>
</table>

The King Valley region segments are summarised in Table 4.

### Table 4: King Valley Region Segments

<table>
<thead>
<tr>
<th>Regional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Proximity to major population centres</td>
</tr>
<tr>
<td>Relatively close to Albury, Wodonga, Bright and Wangaratta but 2.5 hours from Melbourne</td>
</tr>
<tr>
<td>2. Wineries and wine produced</td>
</tr>
<tr>
<td>Diversity of wines; emphasis on Mediterranean varietals</td>
</tr>
<tr>
<td>3. Primary food production and food service</td>
</tr>
<tr>
<td>Milawa Gourmet Region specialising in cheeses, honey, mustard and olives</td>
</tr>
<tr>
<td>4. Accommodation</td>
</tr>
<tr>
<td>Camping; caravan; motels; B&amp;Bs; pubs - and a 5 star hotel</td>
</tr>
<tr>
<td>5. Natural attractions</td>
</tr>
<tr>
<td>King River and Ovens River</td>
</tr>
<tr>
<td>6. Marine/coastal aspects</td>
</tr>
<tr>
<td>Not applicable</td>
</tr>
<tr>
<td>7. Heritage</td>
</tr>
<tr>
<td>Picturesque townships and buildings. Associations with AB ‘Banjo’ Paterson and Ned Kelly</td>
</tr>
<tr>
<td>8. Culture and the arts</td>
</tr>
<tr>
<td>Mostly related to events in the region like La Dolce Vita, Weekend Fit for King</td>
</tr>
<tr>
<td>9. Sports and adventure activities</td>
</tr>
<tr>
<td>Alpine Valley Rail Trail, bush walking, white water rafting, trout fishing</td>
</tr>
<tr>
<td>10. Other attractions</td>
</tr>
<tr>
<td>The Great Alpine Road, Black Range Trout Farm</td>
</tr>
</tbody>
</table>

**Festivals and events**

There are a number of events and festivals that are held in the King Valley region. These include:
- Beat the Winter Blues ‘n’ Jazz
- Beechworth Oktoberfest
- Brown Brothers Winter Festival
- Campbell’s Walkabout Dinner at Tuileries
- Gnocchi Fiesta—La Dolce Vita Celebration
- Jazz Among the Vines
- Ned Kelly Weekend
- Stitched Up Textile Festival
- The Beechworth Celtic Festival
- The Wangaratta Rural Expo
- Wangaratta Festival of Jazz and Blues
- Weekend Fit for a King.
Emerging Wine Regions: Adelaide Hills (South Australia)

**Overview**

Adelaide Hills is one of South Australia’s largest and oldest wine regions. The area stretches from the Barossa and Eden Valleys in the north, to the boundaries of McLaren Vale and Langhorne Creek in the south, and to the eastern boundary of the city of Adelaide. The region’s steep hillsides and valleys provide the conditions for premier high altitude wines. The first vines were planted in the Hills in 1839 (three years after South Australia was declared a state). In 1842, the arrival of German pioneers saw more plantings around the new settlement of Hahndorf. In 1845, a case of the local wine was delivered to Queen Victoria. However, winemaking came to an end by 1905 and re-emerged only in the 1970s when industry identities such as Brian Croser, Geoff Weaver, Tim Knappstein and the Henschkes planted vines in the region. Viticulture, horticulture, food production and tourism are now the Adelaide Hills’ main industries.

**Regional structure**

The structure of the wine industry may be described as predominantly boutique owner-operated. A lot of the fruit is processed outside of the region.

**Regional resources**

Adelaide Hills is not currently perceived as a food or wine region by consumers and consequently the branding of the region’s food and wine identity is still in development. Accordingly, the region’s resources and the ways in which it is being promoted revolve around Adelaide Hill’s distinct landscape and climate, while only being a twenty-minute drive from Adelaide. Adelaide Hills Tourism, for example, is encouraging prospective visitors to ‘experience all four seasons’: the changing colours in autumn, warm fires and historic B&Bs in winter, blooms and berries in spring, and cool cellar door retreats in summer. Whilst food and wine play an important role in the promotion of the region’s seasonal attractions, an overriding asset of the region is its proximity to Adelaide. In comparison to the King Valley, which emphasised the diversity of its wine, the status of Adelaide Hills as an emerging region relies on other aspects which influence and enhance the food and wine experience. In the opinion of one key stakeholder:

> Food and wine is not necessarily a motivator for someone to come up to a region, it’s almost expected nowadays that there is going to be quality food and wine.

As such, the region’s relatively unknown food and wine assets are being promoted through the following core perceptions:

- accessibility (proximity to Adelaide);
- seasonality (distinct seasons); and
- distinctiveness (landscape and climate).

**Regional segments**

**Proximity to major population centres**

The Adelaide Hills is a 20-minute drive southeast of Adelaide and a 40-minute drive from Adelaide International Airport. Road access from Adelaide city centre is via the South Eastern Freeway which links Adelaide and Melbourne. Major destinations in the Adelaide Hills, including Mount Lofty, Stirling, Hahndorf, Birdwood, and Mount Barker, are all well signposted from the Freeway.

**Wineries and wine produced**

The emphasis in the region is on cool climate wines. Petaluma’s Bridgewater Mill has received many awards for its cellar door and is also known as the home of Croser sparkling wine. Although the branding of the region’s wine identity is still in development, the key stakeholders interviewed for this study expressed a desire to produce and promote premium wine that is regionally distinctive. Currently, as one winery operator noted, ‘There are some individual wine brands that have a stronger brand recognition than the region [has]’. Adelaide Hills Wine Region Inc. has identified the essence of the Adelaide Hills wine ‘brand’ as ‘vibrant’ and ‘fresh’. Marketing efforts, therefore, focus on sauvignon blanc—a wine variety with such properties—as a way of conveying the region’s wine identity. The region currently has 26 cellar doors, which represent fewer than half of the wineries operating in the region.
Primary food production and food service
Adelaide Hills’ tourism identity appears to be more closely linked to food than to wine. As one stakeholder pointed out, the food industry has existed long before the wine’s industry re-emergence in the 1970s. Major food businesses such as Springs Salmon, Melba’s Chocolates and Beerenberg have prospered in the Adelaide Hills and boutique food producers are currently leading the way in the development of a gourmet food sector. The Bridgewater Mill Restaurant, which is located at the Petaluma winery, has won many regional, state, and national awards. The German village atmosphere of Hahndorf offers a range of ginger-bread style shops, which sell German-style food: wursts, cakes and confectionery. The region also has a strong pub culture with many pubs serving English-style pub food. Another attraction is the Adelaide Hills Harvest Festival (food and wine).

Overall, it is the fresh food producers which provide the Adelaide Hills with a prominent food identity. According to one stakeholder, ‘Food is more strongly linked to the Adelaide Hills [because] it’s got a tradition with food production and quite a strong regional feel for the food’. Furthermore, as the comments of a food industry representative indicate, the reputation of Adelaide Hills as a producer of quality food products is well known in the east coast cities of Australia: ‘It’s unusual to go into a gourmet (shop) now in Melbourne and not see a good strong range of South Australian products’. The current task for Adelaide Hills, however, is to ensure that the brand recognition of Adelaide Hills food is distinctive and readily associated with quality.

Accommodation
With over 70 B&Bs, Adelaide Hills is perhaps best known for its variety of B&B accommodation. The region also has two boutique style hotels—Grand Mercure Mount Lofty House and Thorngrove Manor. Although the region does cater for groups and families (for example Hahndorf Resort, Mount Barker Caravan Park, and Mount Lofty Railway Station Lodge), the region, as noted by Adelaide Tourism, does lack larger accommodation facilities.

Natural attractions
In addition to the changing scenery, the region’s natural and nature-based attractions include:

- Mount Lofty—Summit and Botanic Gardens
- Belair National Park
- Cleland Wildlife Park
- Mark Oliphant Conservation Park
- Horsnell Gully Conservation Park
- Morialta and Black Hill Conservation Park
- Warrawong Earth Botanic Sanctuary.

The Adelaide Hills also provides a range of walking trails (for example Yurrebilla, Heysen and Mawson) and activities which make the most of the region’s natural attractions. However, the natural, heritage and cultural attractions of the region can be seen to overlap in many ways. For example, Mount Lofty in Cleland Conservation Park, which boasts breathtaking views at its summit, is also the site of Mount Lofty House, a restored nineteenth century mansion.

Marine/coastal aspects
This segment is not applicable to this wine region.

Heritage
The region’s historical background, especially in relation to its German roots, plays a central role in the region’s tourism attractions:

- Hahndorf historic German village
- Mount Torrens (State Heritage Town)
- Johnston’s Oakbank Brewery
- Marble Hill Ruins
- Jupiter Creek Heritage Trail
- Hans Heysen’s The Cedars (historic artist’s studio)
- Mount Lofty House (circa 1852).

Culture and the arts
The cultural life of Adelaide Hills is closely linked to its heritage. The Heysen festival of the arts is named after the late artist Sir Hans Heysen, whose home ‘The Cedars’ is open to the public for guided tours. Hahndorf’s main street also has several galleries, including Hahndorf Gallery which houses an important heritage collection.
Analysing key characteristics of selected Australian regions

and changing exhibits from local artists, and Main Street Gallery which has contemporary works by Australian
and international artists. The location of Petaluma’s Bridgewater Mill Restaurant & Cellar Door was, as its name
suggests, a flour mill in the 1860s and was the first mill in the state driven by water. The National Motor
Museum in Birdwood is an international centre for the Australian transport history. The Museum is the finishing
line for the Bay to Birdwood Classic, an annual car rally event which features vintage cars. The Mount Barker
Jazz Festival is also another attraction.

Sports and adventure activities
There are several regional sporting events that attract visitors and include the Oakbank Easter Racing Carnival as
well as the Jacob’s Creek Tour Down Under.

Other attractions
Other attractions that are situated within the Adelaide Hills region are the National Motor Museum and the
Mount Lofty Botanic Garden.

Affiliations and networks

Winery owners and operators
Adelaide Hills Wine Region Inc. represents about 200 growers and wine makers in the Adelaide Hills. The group
aims to provide a coordinated effort in the enhancement of fruit and wine production and marketing of the
regional brand. The group is largely funded through the Adelaide Hills Wine Industry Fund administered by the
State Department of Primary Industries and Resources (funding is dependant on all grapes sold and wines
produced). Adelaide Hills Wine Region’s funding had previously emerged from a regional assistance program
which was obtained in conjunction with the Adelaide Hills Food Network.

Food and wine groups
The main food group in the region is the Adelaide Hills Food Network which has a membership base of
approximately seventy food producers. Established in 1998, the group’s main objective is to develop and
promote the ‘Adelaide Hills’ brand in the local community and the international gourmet scene. Members of the
Adelaide Hills Food Network meet once a month and the meetings are frequently used to taste test members’
new products, contribute to packaging and design, or to hear from educational speakers and other member
businesses.

A representative from the Adelaide Hills Food Network, along with 23 other food industry representatives, is
also a member of the Premier’s Food Council, which meets quarterly with senior government officials. The
Premier’s Food Council have developed a State Food Plan which outlines the industry’s development priorities
and the responsibilities for both government and food industry participants. Current projects include providing
commercial representation for member companies overseas and creation of the Food Export Centre. The Centre
provides a single point of contact for food companies and international buyers. South Australia’s Strategic Plan
has given the Food Plan a higher profile and encouraged greater industry participation through the Premier’s
Food Council. The goal of the State Food Plan, to grow the value of the food industry to $15 billion by 2010,
will play a large part in achieving the export target of the South Australia Strategic Plan ($25 billion) by 2013.

Visitor information centres
The Adelaide Hills Visitor Centre is located in the main street of Hahndorf and is funded by Adelaide Hills
Council, the District Council of Mount Barker, and the Adelaide Hills Tourism Board. The town of Hahndorf is
also promoted through the Centre because of the Centre’s relationship with The Hahndorf Business and Tourism
Association, which funds the Centre through rate levies collected by the Council.

Councils, shires and local government
Adelaide Hills Council, the District Council of Mount Barker and the AH Regional Development Board provide
funding for Adelaide Hills Tourism. Members from each of the two councils sit on the board of the Adelaide
Hills Tourism Committee.

State tourism organisations
Adelaide Hills Tourism (AHT) implements the marketing strategies on behalf of the South Australian Tourism
Commission for the region. The organisation is made up of marketing committee members from around the


region. AHT has approximately 290 tourism operators on their database. AHT encourages cooperative marketing campaigns (for example visitor guide, website) with neighbouring regions such as the Barossa, Murraylands and the Fleurieu Peninsula.

**Relationship structure**

Funding, management and coordination of regional events and the VICS continues to be a problem. Volunteer support is also difficult to raise and maintain. The key networks and relationships are summarised in Table 5.

**Table 5: Adelaide Hills Relationship Structure**

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisation Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Winemakers Federation of Australia</td>
<td>AH Harvest Festival</td>
<td>VIC +</td>
<td>Hahndorf Business &amp; Tourism Association</td>
</tr>
<tr>
<td>AH Tourism</td>
<td>AH Wine Region Inc.</td>
<td>Wineries +</td>
<td></td>
</tr>
<tr>
<td>AH Council &amp; District Council of Mt Barker</td>
<td>AH Food Network</td>
<td>Accommodation +</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Local Attractions</td>
<td></td>
</tr>
</tbody>
</table>

**Table 6: Adelaide Hills Region Segments**

<table>
<thead>
<tr>
<th></th>
<th>Adelaide Hills Regional Assets and Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Proximity to major Population Centres</td>
<td>20 mins drive from Adelaide</td>
</tr>
<tr>
<td>2. Wineries and wine produced</td>
<td>Premium cool climate; emphasis on pinot noir, sauvignon blanc</td>
</tr>
<tr>
<td>3. Primary food production and food service</td>
<td>Established industry and a growing gourmet sector</td>
</tr>
<tr>
<td>4. Accommodation</td>
<td>Best known for its many B&amp;B’s</td>
</tr>
<tr>
<td>5. Natural Attractions</td>
<td>Four distinct seasons. Conservation parks, wildlife park and botanical garden</td>
</tr>
<tr>
<td>6. Marine/coastal aspects</td>
<td>Not applicable</td>
</tr>
<tr>
<td>7. Heritage</td>
<td>Natural and heritage overlap; German heritage, historic buildings</td>
</tr>
<tr>
<td>8. Culture and the arts</td>
<td>Art galleries in Hahndorf, Arts and Jazz festivals, museum and classic cars rally</td>
</tr>
<tr>
<td>9. Sports and adventure activities</td>
<td>Horse racing and cycling events</td>
</tr>
<tr>
<td>10. Other attractions</td>
<td>National Motor Museum, Mount Lofty Summit, Mount Lofty Botanic Garden</td>
</tr>
</tbody>
</table>

**Festivals and events**

The regional events include:

- Adelaide Hills Harvest Festival (food and wine)
- Oakbank Easter Racing Carnival (horse racing)
- Bay to Birdwood Classic Car Rally
- Heysen Festival (arts)
- Jacob’s Creek Tour Down Under (cycling)
- Mount Barker Jazz Festival.
Growing Wine Regions: Mornington Peninsula (Victoria)

Overview
The Mornington Peninsula is a large wine region extending along the length of the Mornington Peninsula from the Moorooduc plain in the north to Red Hill in the south. The region encompasses the beaches of Frankston with the inlets around Mount Eliza and Mount Martha, and then stretches from Safety Beach to Dromana, Rosebud, Rye and on to Sorrento and Portsea. It has been dubbed ‘Melbourne’s playground’ because it has long been a popular holiday destination for Melburnians. The region has only recently become known for its wines, in particular for its pinots, and more notably, pinot noir. It is only since the mid-1970s that there have been significant plantings of vines. Even though in 2006 there were over 50 cellar doors and over one-third of these had restaurants or cafés there has not, until recently, been an emphasis on wine for promoting the Mornington Peninsula. The new image of the Mornington Peninsula, ‘Almost Un-Australian’ promoting a European/Mediterranean style with an Australian twist, does now bring wine into greater focus.

Regional structure
There are 170 vineyards at least 50 wineries with cellar doors open for tastings. Most wineries are concentrated in the hinterland area around Red Hill, Merricks, Main Ridge, Balnarring, Moorooduc and Shoreham, making touring and wine tasting an easy combination.

Regional resources
Mornington Peninsula’s bay, ocean, beaches and its natural bushland setting are pivotal to the region’s identity. As one stakeholder pointed out, the fact that the region is a peninsula is one marketing feature that ‘everyone takes for granted’. The marketing of the region as European/Mediterranean does not only relate to the physical characteristics of the land (according to Mornington Peninsula Tourism’s website it is also ‘boot-shaped like Italy’), but also to the promotion of the region as a uniquely diverse and indulgent travel destination. The peninsula’s natural diversity is also indicative of the various activities that are available to visitors to the region; activities which frequently revolve around food and wine and the changing scenery. The region’s identity, as one of diverse attractions and experiences, is a view commonly shared by the stakeholders interviewed. As one winemaker put it, Mornington Peninsula ‘isn’t a single flavoured destination … that’s what its strength is, rather than having one particular thing’. This view was certainly reflected in the number of different responses from those interviewed when asked about what attracts visitors to the region. The variety of responses included proximity to Melbourne, diversity of activities, the beaches, and scenery; the wine and food experience, reputation and events were seen as the major attractions. The key strengths of the Peninsula can best be described as cultural wherein food and wine are viewed as ‘experiences’ of an environment variously described as ‘beautiful’, ‘stylish’, ‘classy’ and ‘sophisticated’.

Regional segments

Proximity to major population centres
The Mornington Peninsula region is just over an hour’s drive from Melbourne and close to the beachside towns of Rue, Sorrento and Portsea.

Wineries and wine produced
The temperate maritime climate of the Peninsula is similar to that of the Bordeaux region in France and, as such, in the words of one respondent, it as ‘an ultra-premium wine-producing region’. Surrounded by sea, the area receives good rainfall throughout the growing season, supplemented by irrigation if required, and a high level of humidity during the summer months. The climate also offers an extended ripening period which is ideal for premium grape growing. The landscape is open, with gently undulating hills, rather than forest or steep hillsides.

Although less than 1% of the red wine market, pinot noir is the region’s flagship variety (nearly half of the region’s plantings) while chardonnay ranks second with just over a quarter of the plantings. Pinot gris, which represents fewer than 10% of the planting, is also seen as a key variety in term of national crush—Mornington Peninsula produced 28% of Australia’s pinot gris crush in 2004.
Although those interviewed generally agreed that the wine industry in the region is fairly cohesive in terms of tourism (that is, attracting visitors to the region), there was concern about quality and consistency. As one stakeholder commented:

*At least three-quarters of the wineries down here are just too small to really be a viable thing ... there's (sic) also great fluctuations in the quality of wines in this region ... it's the consistency that people are looking for ... we need stronger, more robust producers that are putting exceptional wines into the market so that the [region] can start to be seen as a fine wine destination.*

**Primary food production and food service**
The local produce is available directly at farm gates and roadside stalls. Fertile soils ensure top-quality berries, apples and vegetables as well as specialty cheeses, lavender, olives and other produce. Markets offer fruit, berries, vegetables and herbs. Mornington Peninsula Gourmet’s (MPGourmet) ‘Harvest to Table’ festivals are held every March. The Festivals, which take place at venues across the diverse Mornington Peninsula region, offer a variety of food experiences including local fresh produce at farm gates and restaurants, tastings, boutique beers, markets, hampers, produce platters, picnics, ‘meet the maker’ sessions, cooking classes, breakfasts, long lunches and slow dinners as well as live entertainment. This annual hallmark event ties in with the Mornington Peninsula Vigneron Association’s (MPVA) Peninsula Pinots Week.

**Accommodation**
The accommodation in the region focuses on the beachside aspect. There is a range of accommodation, with a large number of Bed and Breakfast providers as well as farm-style cottages. The high end of the market is catered for with a range of four-star establishments such as Woodman Estate. An example of innovative accommodation in the region is Georges, which is a European-style live-in cooking school that utilises local produce.

**Natural attractions**
The Mornington Peninsula wine region is surrounded by 25,000 hectares of national parks which offer a diverse range of landscapes, from the bushland of Greens Bush through to the basalt cliffs of Cape Schanck and the roaring surf of Gunnamatta. Mornington Peninsula National Park, Point Nepean National Park and Arthur's Seat State Park contain the largest and most important areas of native vegetation remaining on the Mornington Peninsula. Other parks on the Mornington Peninsula include:

- Collins Historic Settlement Site
- Coolart Wetlands and Homestead
- Mushroom Reef Marine Sanctuary
- Port Phillip Heads Marine National Park.

**Marine/coastal aspects**
Bay views are also a natural consequence of the peninsula location. Arthur’s Seat, the Mornington Peninsula’s highest viewpoint, allows panoramic views across the bay towards Melbourne. Point Nepean, which is located at the end of the Peninsula, also offers spectacular views of Port Phillip Bay and the ocean as well as being a place to view dolphins, seals and whales. Other marine/coastal aspects include French Island and Philip Island.

**Heritage**
The Mornington Peninsula has many historic seaside villages which were established in the early nineteenth century. However, although the heritage aspect is not a major part of the region’s tourism identity, there are some attractions worth noting:

- The heritage listed Briars Park houses the world renowned collection of Napoleonic memorabilia.
- The Park at Point Nepean still displays fortifications from both World Wars.
- The story of Victoria's first European settlement can also be found in the Collins Settlement Historic Site near Sorrento.
- Maritime history museum is housed at the 145 year old Cape Schanck Lighthouse.
- Scottish migrant history can be found at the National Trust Property of McCrae Homestead.
- Tyabb Packing House, which is situated on seven acres of picturesque surrounds, is Australia’s largest antique centre.
Sports and adventure activities
The Mornington Peninsula offers a wide range of sports and adventure activities. There are 18 golf courses, a racecourse at Mornington where an annual Cup Day features a local holiday and a swimming event like the Portsea Swim Classic.

Culture and the arts
The region’s cultural attractions predominantly revolve around art. There is a variety of art galleries on the Mornington Peninsula which take advantage of the natural environment either in location, theme and/or outdoor displays. Mornington Peninsula Regional Gallery features the works of Australia’s highly regarded artists along with exhibitions that feature the Mornington Peninsula’s natural environment. Similarly, Montalto Vineyard holds an outdoor sculpture exhibition from February to April which is open to any artist working in any medium. McClelland Gallery and Sculpture Park displays over 50 permanent works by leading Australian artists and has recently acquired Australia’s largest male nude sculpture, ‘Thus Spake’, which was created by the eminent sculptor Peter Schipperheyn. Sand sculpting is also an attraction and every year the Rye Beach Sand Sculpting Championship is held in February to April each year.

Other attractions
Other attractions in the region include the Cape Schanck Lightstation and many gardens that were established in the early 1800s.

Affiliations and networks

Winery owners and operators
The Mornington Peninsula Vignerons Association (MPVA) is the industry association for the winemakers and grape-growers of the region. It aims to enhance the profile of the Mornington Peninsula wine region and market it as a leading producer of high quality maritime cool climate wines. The MPVA represents the regional industry to its various audiences, including the local community, tourism organisations, industry bodies and government. The group coordinates the production of information and promotional activities of common interest to members.

The MPVA is managed by a committee elected by the Membership. The Officers comprise: President, Vice-President, Honorary Secretary, and Honorary Treasurer. The Committee consists of the Officers and up to four Members, who must all be Full Members of the Association. One Associate Member is also eligible to be elected to the Committee of Management at the AGM each year by a vote of Members and Associates (for this purpose, Professional Associates are included under the category of Associate). The Committee meets monthly. Its role is to establish policy and provide strategic direction for the Association.

The Association has a number of sub-committees, which meet regularly to discuss issues in their particular area of interest and organise relevant activities for the membership. Currently, sub-committees include: Technical, Promotions and Wine Quality. New sub-committees are established as required. The sub-committees report to the Management Committee and refer to the Committee for all policy decisions.

The Mornington Peninsula Wine Industry Partnership (MPWIP), which was established in 2001 to consider environmental issues and impacts of the wine industry on the Mornington Peninsula, is an important affiliation. The partnership committee includes MPVA, Mornington Peninsula Shire Council, Department of Primary Industries (DPI), Monash University, the Cooperative Research Centre for Viticulture and EPA Victoria. The MPWIP has launched ‘A Community Guide to Environmental Best Practice Winery and Vineyard Management’. This Guide is the first major project of the WIP. It is for all the community. For vineyard and winery owners and prospective owners, the Guide is a vital tool, providing best practice guidelines and information on environmental responsibility and government legislation. For the community, the Guide provides an insight into the Mornington Peninsula wine industry, its economic value, its responsibilities, its social impacts, and its environmental impact on the landscape.

Food and wine groups
Mornington Peninsula Gourmet (MPGourmet) is a food network with a diverse membership which covers the broad range of produce on the Mornington Peninsula. The group was originally set up five years ago as a local tourism association and now has approximately 82 members. Members are ‘provenders’ and include food producers, boutique manufacturers, retail outlets, cafes, restaurants and other industry stakeholders; and a network which includes marketing, publishing and event organisers as well as bed and breakfast, guest house,
motel and vineyard accommodation, cellar door operators, tour operators, attractions, function centres.

MPGourmet aims to encourage a quality standard in products, and one that distinguishes the Mornington Peninsula as a premier gourmet food and wine tourism region. MPGourmet also endeavors to build a strong foundation for the region’s tourism through the linking of MPGourmet members and the broader tourism industry. The key programs initiated by MPGourmet include four seasonal table events that are held in venues across the Peninsula and the highly successful MPG Touring Food Map which was launched in 2004 and has now been revised and expanded. MPGourmet participates in events via individual members (e.g. Red Hill Show) and as an Association (e.g. Winter Wine Weekend) which provides a valuable profile for the region’s food.

Visitor information centres
Mornington Peninsula Tourism, while managing the Level One accredited visitor centre, also runs the regional tourism organisation for the whole of the Mornington Peninsula. MP Tourism is responsible for designing the marketing campaigns linked with Tourism Victoria. MP Tourism also operates a commission-based accommodation and event booking service for the entire Peninsula as well as offering industry development advice. MP Tourism also plays an active part in the pre-promotion of events and offers. The MP Tourism Board is comprised of a representative from all local tourism associations.

Councils, shires and local government
One stakeholder was of the opinion that there needs to be more cooperation between the Mornington Peninsula Council and Frankston City Council: ‘Mornington Peninsula Shire Council does a hell of a lot in sponsoring the regional tourism officer … whereas the Frankston Council doesn’t commit anywhere near as much monetarily or even time’.

Whether or not such a claim is an accurate reflection of each council’s involvement, the issue of funding support is, nevertheless, a concern that was frequently cited by those interviewed. Since these interviews Frankston City Council has opened a Visitor Information Centre on the extensively upgraded waterfront by the bay.

State tourism organisations
The change in Tourism Victoria’s ‘jigsaw’ campaign has had a positive effect on the marketing of the Mornington Peninsula as a tourist destination. The region was previously part of the ‘Bays and Peninsulas’ campaign (which also incorporated the Bellarine Peninsula), but now stands alone as ‘Mornington Peninsula’ in the current destination marketing campaign. Tourism Victoria’s revised marketing strategy has provided, as one stakeholder put it, ‘a good opportunity to become closer to tourism, to learn more about how Tourism Victoria works’. The positive relationship is further strengthened by various other links between the state and regional associations which, to the stakeholders interviewed, were seen as beneficial. For example, the ‘Destination Mornington Peninsula’ chairman for Tourism Victoria is also the convenor of the MPVA marketing group as well as sitting on the board of the Victorian Wineries Tourism Council.

Relationship structure
The region has created strong links between its major stakeholders which is evident across all of the network categories. Tourism Victoria’s current destination marketing has assisted the region’s marketing efforts in attracting tourists to the region. Nevertheless, it was pointed out that the region’s link to food and wine need to be made ‘a lot stronger’ in order to ‘pull people off the beaches and golf courses’. In this respect, the success of the region’s events is a good indication of the region’s robust relationship structure. The Harvest Festival and Pinot Week, which are held concurrently each year, are a culmination of the ‘very cooperative’ partnership between MPGourmet and the MPVA. By all accounts, the MPVA is perceived to be an effective means of building broad support as it is the only wine association in the region. As a result, as one of the stakeholder indicated, the wine industry in the region has a ‘fairly united front’ in that information is distributed readily and events in the region are well organised and attended.

Although all the stakeholders interviewed thought the region has a cohesive approach to tourism, there were, however, some tensions identified within the approach. One stakeholder cited the ‘fragmentation of different agendas’ wherein, for example, a winery which has a restaurant will ‘push one particular tourism path’ instead of another. A related issue is the ‘huge gap’ in the marketing of wineries which have restaurants. According to a stakeholder interviewed, wineries need to consider restaurant only visitors in their marketing efforts. Although this is sound advice, the rationale behind such efforts also needs to be taken into account. For example, one winery operator interviewed pointed out a mismatch in the destination vision: ‘The local tourism authority seems to have marketed to the lowest end of the tourism market … it’s absolutely in conflict with what we’re trying to
Analyzing key characteristics of selected Australian regions

achieve’. The comments suggest that although there might be a united approach to tourism in the region, this cohesion needs to extend to an understanding of the business objectives of individual stakeholders since the organisational view of tourism is often too broad. In the case of Mornington Peninsula, where there appears to be a consensus about the region as a ‘boutique’ destination, tourism development will require effective communication between organisations and individuals in the industry to achieve consistency in the regional brand. A summary of the key networks is provided in Table 7.

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Victoria</td>
<td>MPVA</td>
<td>VIC + Wineries +</td>
<td>Live-in cooking school combining</td>
</tr>
<tr>
<td>VIC in Dromana &amp; Mornington</td>
<td>MP Gourmet</td>
<td>Tour operators + accommodation</td>
<td>accommodation providers and local produce</td>
</tr>
<tr>
<td>Frankston &amp; Mornington local councils</td>
<td>World’s Longest Lunch</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Pier &amp; Pinot Festival</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 7: Mornington Peninsula Regional Identity

<table>
<thead>
<tr>
<th>Mornington Peninsula Regional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Proximity to major population centres</td>
</tr>
<tr>
<td>2. Wineries and wine produced</td>
</tr>
<tr>
<td>3. Primary food production and food service</td>
</tr>
<tr>
<td>4. Accommodation</td>
</tr>
<tr>
<td>5. Natural attractions</td>
</tr>
<tr>
<td>6. Marine/coastal aspects</td>
</tr>
<tr>
<td>7. Heritage</td>
</tr>
<tr>
<td>8. Culture and the arts</td>
</tr>
<tr>
<td>9. Sports and adventure activities</td>
</tr>
<tr>
<td>10. Other attractions</td>
</tr>
</tbody>
</table>

Festivals and events
A diversity of events, which make the most of the region’s seaside location, food and wine, take place every year on the Mornington Peninsula. Examples of these include:
- Portsea Swim Classic, one of the largest open water swims held in Australia
- Rye Beach Sand Sculpting Championship
- Harvest Festival and the Winter Wine Weekend—the most successful and high profile of the food and wine events
- Pinot Noir Celebration—a biennial event of international renown
- Peninsula Piers and Pinot
- Redhill and Sorrento Long Lunches.
Growing Wine Regions: McLaren Vale (South Australia)

Overview
McLaren Vale is a compact wine region situated within a 40-minute drive of Adelaide. The region is bordered to the north by the city of Adelaide, with Adelaide Hills to the east, Sellicks Hill Range to the south and the Gulf of St Vincent to the west. It has a western boundary with the sea and hence the region has been promoted as ‘where the vines meet the sea’. Historically, it is a long-established wine region with the first vines planted in 1838 by John Reynell, who later employed a young labourer named Thomas Hardy. Englishman George Pitches Manning established Seaview winery in 1850. By 1889 more than 7300 acres were under vine and 70 recognised winemakers worked in the colony (including Pirramimma, which was established in 1892 and still owned by the Johnson family). Many of the award-winning wines produced in the region today come from 100 year-old vines.

While there are now over 89 wineries in the region (60 with cellar doors), it was described by one respondent as ‘a boutique wine region for quality wines’. Food is also an important regional component but, for critical mass, local food businesses are members of the Fleurieu Peninsula Food Group. The township of McLaren Vale is central to this region, with Reynella and Clarendon to the north, Kangarilla on the Eastern Boundary, Aldinga on the coastal edge to the west, and in the south, Mount Compass and Sellicks Hill. The link to the Fleurieu Peninsula is an important one, as the tourist travelling from Adelaide to the various attractions on the Fleurieu Peninsula passes through McLaren Vale.

The region is home to such eminent winegrowers as Chester Osborn, Geoff Merrill and Andrew Garrett. It has become one of Australia’s premier wine-producing districts particularly renowned for its full-bodied reds. Well-known wineries in the McLaren Vale region include Wirra Wirra, Tyrrell’s, Rosemount Estate, Haselgrove, Hardys, Tintara, d’Arenberg and Chapel Hill.

Regional structure
The majority of wineries in the area are small, family run operations which give McLaren Vale a diversity of experiences and characters. One winery operator described the region as ‘boutique with very few exceptions’ and was proud of this status because it allowed for a certain amount of freedom: ‘we’re not corporatised and basically winemakers are free to do whatever they want in this region’. Hospitality and accessibility to the winemaker were also seen as assets of McLaren Vale’s wine industry.

Regional resources
The region’s proximity to Adelaide was frequently mentioned as a motivating factor for visitors; however, the majority of stakeholders also cited McLaren Vale’s established reputation as a wine region and ‘the physical attraction of the vineyards’ as major assets. McLaren Vale’s reputation for food was also considered as a motivating factor:

If you are talking about the McLaren Vale region, you would definitely say that they are motivated by the wine, but the statistics don’t always bear out that that’s true. They will tend to say that people come for food very high up on the list, along with wine.

When asked about the region’s distinguishing marketing features, one winery operator commented ‘I suppose we’re a little known area but we produce bloody good reds’. Undoubtedly, wine and food were considered the major assets by all of the stakeholders interviewed.

Regional segments
Proximity to major population centres
McLaren Vale is 45 kilometres from Adelaide via Main South Road and the Southern Expressway. The region is approximately half way the Fleurieu Peninsula, which provides access to Kangaroo Island. From McLaren Vale, it is a further 50 kilometres to Langhorne Creek.

Wineries and wine produced
McLaren Vale is famous for its shiraz and its ability to produce full, robust reds. Shiraz makes up the majority of vine plantings in the region and most winemakers produce at least one shiraz wine. However, the region also excels at producing other varieties such as chardonnay, sauvignon blanc and riesling. Innovation is also a major strength of the wine industry since the region’s micro-climate and soil allows for experimentation and the ability to ‘produce individual wines’. As one winery operator described it, ‘the traditional aspect that we have in our
Analysing key characteristics of selected Australian regions

history and family is that there is also innovation’. In this regard, Cadenzia, a McLaren Vale venture and a trademark of the McLaren Vale Grape and Wine Tourism Association, gives winemakers the opportunity, after vintage, to blend an exceptional wine around the grenache variety.

Primary food production and food service
Food production is a major industry of the region and has a culinary heritage which is best described as Mediterranean with its focus on seasonality and freshness. Italian and Greek immigrants farmed olives in the late 1800s, and many grape-growers still line their vineyards with olive trees. The region’s olive oil is compared favourably to Europe’s finest. Almonds, olives, venison, cheeses, organic vegetables, berries, beef, lamb and rainbow trout are renowned in this region. The weekly farmers’ market at Willunga is the centre of food for McLaren Vale. A growing number of restaurants, farmers’ markets, cellar doors and speciality stores are devoted to using the abundant local produce. For example, the middle eastern speciality ‘dukkah’ is a popular McLaren Vale product because it uses the region’s almonds with a blend of spices. According to the region’s most prominent chef and spokesperson, Pip Forrester, the ‘essence of the McLaren Vale food is seasonal and regional’. The region’s popular food and wine events are therefore an accurate reflection of the way in which produce is passionately promoted along the lines of regionality and seasonality. The Sea and Vines Festival held during the Queen’s Birthday is a celebration of the region’s variety of produce, whilst the annual Fiesta! Festival in October is a celebration of the new season’s olive oils and wines.

Accommodation
In addition to holiday and caravan parks and motels, the region has a relatively large number of B&Bs and self-contained cottages. The large number of B&B businesses in the area led one stakeholder to comment on the motivations of some operators who do not seriously consider their B&B as a business, ‘while there’s always a market for that sort of mid-range, it’s the high end that really are the signature … and there’s enough of those that we’re fortunate to have in the region’. The predominance of B&Bs in McLaren Vale also provides a good fit with the region’s tourist market in comparison to the Fleurieu Peninsula’s ‘caravans and campers’, ‘People who come to McLaren do seem to treat it as a luxury getaway’.

Natural attractions
The proximity to an unspoilt coast and beaches is a defining feature of the region’s natural attractions. Hence, McLaren Vale continues to be promoted as a place ‘where the vines meet the sea’. The region’s location as the gateway to the Fleurieu Peninsula is also important in terms of attracting visitors who want to experience nature and the outdoors, as one stakeholder put it, ‘When you come to visit McLaren Vale, you really come to visit because an hour by car you’re at Victor Harbour, another half an hour by ferry you’re at Kangaroo Island’. The Peninsula has approximately twenty national parks, the most famous being the Coorong with its significant wetlands. Other natural attractions in the Fleurieu region include the Heysen Trail at Cape Jervis and the native bushland of Deep Creek Conservation Park.

Marine/coastal aspects
McLaren Vale is situated on the coastal fringe of the Fleurieu Peninsula. Nearby there are a number of conservation parks and aquatic reserves. There is also the Onkaparinga River National Park, which is just north of McLaren Vale.

Heritage
While McLaren Vale is one of the oldest wine regions in Australia, the region is not generally known for its heritage attractions. There is, however, a heritage trail where the history of McLaren Vale can be read on plaques located throughout the town.

Culture and the arts
Visiting the region’s many and unique galleries is considered to be an essential McLaren Vale experience. The beauty of the surrounding hills, the beaches and coastal scenery has inspired artists to paint the region for many years. The Fleurieu Art trail, which includes the town of McLaren Vale, takes in 18 different art galleries and studios located along the peninsula. The Bella Cosa Gallery and Sculpture Park includes a pine forest sculpture walk which features works by some of South Australia’s best-known sculptors. The Fleurieu Biennale, Australia’s foremost landscape art prize, is a feature of the district and includes the category ‘Art of Food and Wine’.
Sports and adventure activities
The inaugural McLaren Vale Vintage and Classic Day was first held in 2006 and it is hoped that the event will be staged on an annual basis. In addition, the Fleurieu Peninsula, offers a range of year round activities that include fishing, surfing, (Moana Beach and Port Wilunga), surf fishing (Port Noarlunga), scuba diving, snorkelling, sailing, swimming and winter whale watching.

Other attractions
Other attractions in the area include The Fleurieu Way, which is an interpreted drive between Adelaide and the Fleurieu Peninsula that connects with the Great Ocean Road to Melbourne as well as a horse-drawn tram that runs between Victor Harbor and Penguin Island.

Affiliations and Networks
Winery owners and operators
The McLaren Vale Grape Wine and Tourism Association (MVGWTA) is a membership-based group which represents over 350 growers, winemakers, accommodation operators, restaurants, food producers and tourist operators. MVGWTA’s main objective is to promote McLaren Vale as both a premium wine region and a high quality tourist destination.

The MVGWTA has a history that spans approximately 40 years and can be traced back to the 1870s, through the McLaren Vale Winegrowers Association and the Southern Vales Cooperative Winery, to the McLaren Vale Winemakers Inc., then to the Association of today. The Association has changed from a purely voluntary organisation to a professional organisation with a full-time staff of four which operates from The McLaren Vale and Fleurieu Visitor Information Centre.

The South Australian Wine and Brandy Industry Association was also mentioned by a couple of those interviewed as one of the better alliances where ‘you can pick up lots of ideas’. They cited the monthly cellar door tastings organised by the association as very ‘helpful’ in terms of meeting other winemakers in the region.

Food and wine groups
Fleurieu Peninsula Food is the food industry focal point in the region. The association consists of people and businesses actively engaged in the food industry on the Fleurieu Peninsula including restaurants, chefs, growers, makers, retailers, promoters, manufacturers, exporters, importers, ambassadors, providores, cellar doors, markets and food stalls.

Visitor information centres
The McLaren Vale and Fleurieu Visitor Information Centre is situated on the Main Road of McLaren Vale and is one of five VICs situated in the Fleurieu Peninsula. Primarily to ensure that it remains financially viable, the MVGWTA officially amalgamated with the VIC and now manages the centre. This partnership effectively means that the VIC is a service that is offered by the association and for which members are charged a sliding scale fee. The VIC, through the MVGWTA, now has about 370 member businesses in the region ranging from grape growers, food producers and providers, winery owners and tourism operators.

Although the VIC falls within the City of Onkaparinga boundaries, the centre does not receive any funding from the council, relying instead on membership fees and wine industry funding. As such, the VIC has been ‘a lot more commercially realistic’ as to the types of services it offers. In addition to taking bookings, the VIC also holds art exhibitions, offers meeting and conference space, and operates a cellar door ‘Shinglebank’ adjacent to the building. The VIC also conducts an industry awareness program called ‘Meet Your Maker’ which brings influential trade identities into the region. The VIC links up with smaller associations like the McLaren Vale Trader’s Business Association: ‘a lot of their members are members of the MVGWTA, so we tend to consult with other groups, but we tend to be really the drivers of that in the region’.

Councils, shires and local government
According to one stakeholder, the City of Onkaparinga should be playing a more active role in the promotion of the region’s food and wine tourism. The stakeholder in question was keen to have the council’s support and considered the networking development as a ‘work in progress’ which is ‘quite positive’. The council has, nevertheless, provided funding to the Fleurieu Peninsula Food group and continues to conduct formal discussion groups with the MVGWTA.
Analysing key characteristics of selected Australian regions

State tourism organisations
The South Australian Tourism Commission assists the area through Fleurieu Peninsula Tourism.

Relationship structure
The region’s relationship structure is dominated by the MVGWTA and its formal association with the McLaren Vale VIC. MVGWTA are very much aware of their influential role in harnessing the ‘demonstrated pride’ of its large member base and is currently tackling the development and promotion of the McLaren Vale brand: ‘We’re aiming for the genuine pride process which might take a little while but we feel if we provide a strong brand, people will want to be part of that’.

While the events held through the auspices of Fleurieu Peninsula Food have helped to successfully promote the McLaren Vale brand, Fleurieu Peninsula Food does, however, represent a large region that is fragmented by four council areas and two Regional Development Boards.

Table 8: McLaren Vale Regional Identity

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>McLaren Vale Grape Wine &amp; Tourism Association</td>
<td>Fleurieu Peninsula Food Sea &amp; Vines Festival Fiesta! Festival</td>
<td>VIC + Wineries + Accommodation</td>
<td>Gourmet Escape Packages</td>
</tr>
<tr>
<td>Fleurieu Peninsula Tourism</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 9: McLaren Vale Region Segments

<table>
<thead>
<tr>
<th>McLaren Vale Regional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1 Proximity to major population centres</td>
</tr>
<tr>
<td>Gateway to Fleurieu Peninsula; views of the vines and the coast; less than 45 mins drive from Adelaide</td>
</tr>
<tr>
<td>4.2 Wineries and wine produced</td>
</tr>
<tr>
<td>Full bodied reds, notably shiraz; critical mass of cellar doors</td>
</tr>
<tr>
<td>Sea and Vines Festival</td>
</tr>
<tr>
<td>4.3 Primary food production and food service</td>
</tr>
<tr>
<td>A burgeoning food industry that makes the most of the abundant fresh produce and seasonality; Willunga Farmers Market</td>
</tr>
<tr>
<td>4.4 Accommodation</td>
</tr>
<tr>
<td>A wide selection of B&amp;Bs</td>
</tr>
<tr>
<td>4.5 Natural attractions</td>
</tr>
<tr>
<td>Unspoilt coast and beaches</td>
</tr>
<tr>
<td>4.6 Marine/coastal aspects</td>
</tr>
<tr>
<td>Marine Parks and Conservation Areas</td>
</tr>
<tr>
<td>4.7 Heritage</td>
</tr>
<tr>
<td>Heritage wine trail</td>
</tr>
<tr>
<td>4.8 Culture and the arts</td>
</tr>
<tr>
<td>Fleurieu Art trail</td>
</tr>
<tr>
<td>4.9 Sports and adventure activities</td>
</tr>
<tr>
<td>Surfing; fishing; surf fishing; golf</td>
</tr>
<tr>
<td>4.10 Other attractions</td>
</tr>
<tr>
<td>Winter whale watching and tours and trails</td>
</tr>
</tbody>
</table>

Festivals and events
McLaren Vale is host to one of the longest running and most popular annual food and wine festival, the Sea and Vines Festival. The two day festival is held over the June long weekend and attracts approximately 40,000 visitors each year. The region’s other main event attraction is the Fiesta! Festival (formerly the Bushing Festival) which is a Fleurieu-wide event held in October. The degustation events during Fiesta! are considered an essential part of the McLaren Vale experience. Other events include:
- McLaren Vale Wine Show
- Jacob’s Creek Tour Down Under
- Wilunga Almond Blossom Festival
- Fleurieu Barista Challenge
- Fleurieu Peninsula Biennale
Mature Wine Regions: Yarra Valley (Victoria)

Overview
Under an hour from Melbourne, Yarra Valley is one of Victoria’s most accessible wine regions and a popular day trip from the city. The western boundary begins just 45 kilometres east of Melbourne and is bordered by the towns of Gembrook in the South, Kinglake in the north, Wantirna in the west and Mount Gregory in the east. Major towns include Lilydale, Healesville, Yarra Glen and St Andrews.

Yarra Valley is Victoria’s first wine growing district. In 1838 the Ryrie brothers William, James and Donald established a cattle property Yering Station and planted Victoria’s first recorded vineyard. A few years later, immigrants from Switzerland and Germany settled in the area and planted commercial quantities of wine grape and established wineries. Among them St Huberts, Yerinberg and Yeringa (now Yering farm) produced wines to international acclaim and anchored the Yarra Valley's reputation in the 1800s.

Viticulture spread rapidly through the 1860s and 1870s; however, declining soil fertility and the Australia-wide move towards fortified wine production resulted in all vineyards being converted to pasture by 1937. Replanting began in 1963 with the establishment of Wantirna Estate and over the next decade wineries including Ferguson, Yarra Yering, Mount Mary, Seville Estate, Warramate, Yarra Brun and Chateau Yarrinya (now De Bertoli) were established. But it was not until the third wave which came in the 1980s with the arrival of Coldstream Hills (founded by wine writer James Halliday), de Bortoli and the prestigious Moet & Chandon, that the area passed the high point of the Nineteenth century. Unlike the end of the Nineteenth century, the end of the Twentieth century was marked by phenomenal growth. Hundreds of hectares came under the vine and millions of dollars were invested in wineries and tourist facilities. Over 40 wineries are open for cellar door sales and many have excellent restaurants matching local food with wine made on the premises.

Regional structure
Despite the region’s mix of small and larger wineries, it was thought that industry all had a similar approach:

All of them that are available for tourists have put enough effort into their cellar door and their experiences to make even the small ones really worthwhile ... I think they’re all similar, it’s more the scope and size of what they do ... that sort of sophisticated approach does blend through all of the wineries.

This complementary aspect of the region’s structure was acknowledged by some who saw the ‘rub off’ advantage in the larger wineries promotional activities and events.

Regional resources
The location was perceived to be a major asset both for the wineries and the region as a whole. Beautiful scenery and the various attractions and activities around the valley were also cited as key strengths in attracting visitors to the region. This was best summed up by one interviewee: ‘It’s a food and wine region but I still maintain that most people come out here for the area, the food and wine are a bonus, but if you took either one away it wouldn’t work’. The interviews also highlighted Yarra Valley’s world class reputation as a producer of quality wines. While wine was certainly perceived as the core strength of the region, there was consensus that this was not the main reason visitors were attracted to the area: ‘The key message is about us being sophisticated and stylish enough ... that it actually transfers the image of Melbourne into the Yarra Valley but into a more scenic and rural environment’. Core perceptions of regional identity revolved around:

• location (for wine growing, scenery and tourist accessibility);
• established reputation as a wine region; and
• the variety of attractions and activities.

Regional segments

Proximity to major population centres
The Yarra Valley is under a one hour drive from Melbourne, which makes it very accessible for day trips from Melbourne as well as for overnight stays. The major towns in the area include Lilydale, Healesville, Yarra Glen and St Andrews.

Wines and wine produced
The words ‘quality’, ‘sophisticated’ and ‘stylish’ were often used to describe this region. As one winemaker put it, ‘Yarra Valley is quite unique and the wines that come out of here do have structure, they do have elegance, they’re not the blockbusters that you get out of the Barossa’. The establishment of the French champagne house Domaine Chandon in 1986 has no doubt marked out the Yarra Valley as a premier wine region. Pinot noir and
Analysing key characteristics of selected Australian regions

chardonnay are the most widely planted grape varieties and for which the region is renowned. Sauvignon blanc and shiraz are also considered exceptional varieties in the region. The region’s winemaking heritage, which stretches back over 165 years, reflects the consistency in wine quality coming out of the region. As a relevant example, Victoria’s first vineyard Yering Station was awarded the International Winemaker of the Year at the 2004 International Wine and Spirit one hundred years after it won a Grand Prix at the Paris Exhibition in 1889. In this regard, Yarra Valley’s reputation is perhaps more important than the wine itself, as one winery operator commented, ‘The winery environment is the attraction rather than the winery as in the cellar door’.

Primary food production and food service
The region covers Victoria's most extensive food and produce trail. The Yarra Valley Regional Food Trail is a self-drive tour with stops at one hundred epicurean outlets. Seasonal fruits, berries, free range eggs, honey, and other local produce can be purchased from orchards, farm gates and roadside stalls. Some of the food businesses along the trail include Yarra Valley Pasta Shop, Warratina Lavender Farm, Australian Rainbow Trout Farm, Yarra Valley Dairy and Kennedy & Wilson Chocolate Shop. Other food experiences include the monthly Yarra Valley Regional Farmers’ Market at Yering Station (third Sunday of each month) and the Longest Lunch which is part of Melbourne Food and Wine Festival. Wineries such as De Bortoli with their ‘On the Vine’ Cooking School and the smaller wineries with their Shortest Lunch event also help to showcase the region’s local produce. There was a general feeling that the food sector was ‘happening’ and this was supported by comments from winery owners who were also running successful restaurants. It was pointed out that the branding and development of Yarra Valley food was not as simple in comparison to the region’s wine industry and that a more cohesive approach was needed to elevate the region’s food sector.

For visitors to the surrounding areas, there are numerous Devonshire tea stops dotted throughout the Dandenong Ranges along with award-winning village pie shops and cafés.

Accommodation
The region contains a range of B&Bs and guesthouses, self-contained cottages and cabins, hotels and motels, caravan parks and camp sites. The boutique, five-star Chateau Yering Historic House is an icon whilst the Sebel Lodge resort is the latest five-star addition to the region. The large proportion of B&Bs reflects the region’s ‘bread and butter’ Melbourne market of overnight and weekend visitors. According to one stakeholder, however, the predominance of B&Bs was not necessarily a positive indicator, ‘There’s a lot of good bed and breakfast accommodation in the region but that’s counterproductive to the overall scheme of things because you can’t mobilise bed and breakfast into an organised group that you can market to’. In other words, the wide variety of accommodation providers was viewed as an inhibitor to cooperative destination marketing activities.

Natural attractions
The valley is surrounded by the Great Dividing Range east, Plenty Ranges west and the Dandenong Ranges in the south. Within this region there are a number of national parks including Kinglake National Park and Yarra Ranges National Park; however, the various activities related to the natural environment were not viewed as popular in comparison to winery visits, ‘There are some nice walking tracks … but we don’t have too many people enquiring about that sort of thing’. This comment was supported by another stakeholder, ‘We’ve got to market the area as a pristine, clean, wine region with all the other things tacked on that tourists might want’. Healesville Sanctuary was the most mentioned attraction in this segment.

Marine/coastal aspects
As the Yarra Valley is situated in an inland area, there are no marine/coastal aspects in regard to the region.

Heritage
Apart from the region’s heritage in wine growing and production, other heritage aspects of the region (i.e. historic sites or buildings) were not mentioned as a key component of the region’s identity. Although the Puffing Billy railway was cited many times, it was in the context of an attraction and activity rather than its historical value. Interestingly, Fergusson’s winery cited ‘Ned’s Red’ as their biggest seller in cellar door because of its ‘historical appeal’. Nevertheless, the region does have places of historical interest including the Mont De Lacey Historic Home and Museum and the towns of Yarra Glen and Lilly Dale. The Museum of Lilydale also houses an entertaining exhibition about the Yarra Valley and Dame Nellie Melba.

Culture and the arts
The main activities associated with this segment are an extension of the region’s events, food and wine attractions. Tarra Warra Estate Winery, for example, has a Museum of Art which boasts the largest private
collection of Australian art in the world. The Bundjel Bush Tucker Restaurant also has a gallery that features local Wurundjeri history, an indigenous botanic garden and authentic Australian artefacts. Yering Station holds an annual Sculpture Exhibition and Domain Chandon holds opera recitals in their main hall.

**Sports and adventure activities**
The region has a number of sports and adventure activities including Balloon Sunrise, which is a hot air balloon ride and the Lilydale to Warburton Rail Trail, which is a 38 kilometre trail that follows an old railway line built in 1901 to transport local produce and timber to Melbourne.

**Other attractions**
Other attractions in the area include the Healesville Sanctuary, which has the Burra Burra Yan Indigenous Walking Tour, the Mt Donna Buang Rainforest Gallery and wildlife night tours in the Upper Yarra Reservoir Park.

**Affiliations and Networks**

**Winery owners and operators**
Yarra Valley Wine Network is the promotional and marketing division of the Yarra Valley Winegrowers’ Association which aims to raise the awareness of the region’s wines. The network is a membership based group and currently represents 23 winery operators in the region. The network works closely with the Yarra Valley Regional Food Group.

**Food and wine groups**
- Yarra Valley Regional Food Group (Yarra Valley Brand developed for food, wine, tourism and agribusiness)
- Victoria Food and Wine Council (previously the Victorian Wineries Tourism Council) is a state advisory body which aims to promote and develop food and wine tourism in Victoria.

**Visitor information centres**
The Yarra Valley Regional Tourism Association Inc. operates the Yarra Valley VIC and Accommodation Booking Service which is situated in The Old Courthouse in Healesville.

**Councils, shires and local government**
Although the local councils and shires were seen as the driving force behind the branding of Yarra Valley, the various rules and regulations of the various councils were viewed as a hindrance to the development of different businesses within the region. Destination Yarra Valley Dandenong Ranges Tourism Board is the peak regional tourism marketing body which covers several shires in the region. It is a skills-based marketing and governance committee which represents a range of tourism interests partly funded by Tourism Victoria. The board is currently working on the ongoing development of strategic alliances within the region.

**State tourism organisations**
Tourism Victoria markets the region under the banner of Yarra Valley and Dandenong Ranges. The marketing highlights the Victorian fine wines and tall forests. The Yarra Valley and the Dandenong Ranges are incorporated into the Melbourne Surrounds Regional Tourism Development Plan.

**Relationship structure**
The region’s reputation as a world class wine region was viewed as a standing that needs to be maintained: ‘There is an acknowledgment by all the different areas that we need to actually develop—not develop, I think that’s wrong—we need to actually give the brand we have, which is Yarra Valley, more value’. Marketing and promotion of the region was seen as vitally important to the longevity of the region and giving the regions’ wine and food ‘a sense of place’.

While the various associations and networks in the region were well known, there was a perception that there are ‘probably too many’ groups and a concern that the region was being promoted in a ‘haphazard manner’: ‘At the end of the day there’s always half a dozen people that always get all the benefit from it and that’s a big failing in the system’. Networking was regarded by some as ‘working only to a point’ because, according to one stakeholder, most operators are often ashamed to admit that they have problems: ‘If everybody admitted they
were empty, maybe we could do something about it’. The comments suggest that the main issue of adding value to what is generally recognised as a world-class brand was ‘the challenge of bringing different interests together’. For a region like the Yarra Valley, where there are a few international names, it was acknowledged that a cohesive approach is required: ‘We can’t have the big without the small, the small without the big’. Another stakeholder commented that the general communication between the associations was good but ‘we’re all doing different things … it’s really about the levelling and the various levels in tourism’. It was suggested that an understanding of the complementary and beneficial roles of both big and small operators would greatly assist the ‘healthy’ brand development of the region. Moreover, wineries like De Bortoli were seen as ‘the jewel in the crown’ in terms of their understanding and commitment to tourism. Although a cooperative and cohesive approach is not necessarily specific to the Yarra Valley, as one stakeholder pointed out:

A lot of people in any tourism region will believe that tourism isn’t benefiting their business because they’re up against the big names and they don’t understand the value of having that draw card in the region.

For the Yarra Valley, where the brand is the region itself, a mutual understanding of tourism imperatives is essential to the region’s development as an internationally recognised wine region: ‘It’s really about brand investment’.

Table 10: Yarra Valley Regional Identity

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Victoria; Destination Yarra Valley Dandenong Ranges Tourism Board</td>
<td>Yarra Valley Regional Food Group, Grape Grazing Festival</td>
<td>VIC + Winery + Accommodation</td>
<td>Victoria Winery Tours</td>
</tr>
</tbody>
</table>

Table 11: Yarra Valley Region Segments

<table>
<thead>
<tr>
<th>Yarra Valley Regional Assets and Experiences</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1 Proximity to major population centres</td>
</tr>
<tr>
<td>5.2 Wineries and wine produced</td>
</tr>
<tr>
<td>5.3 Primary food production and food service</td>
</tr>
<tr>
<td>5.4 Accommodation</td>
</tr>
<tr>
<td>5.5 Natural attractions</td>
</tr>
<tr>
<td>5.6 Marine/coastal aspects</td>
</tr>
<tr>
<td>5.7 Heritage</td>
</tr>
<tr>
<td>5.8 Culture and the arts</td>
</tr>
<tr>
<td>5.9 Sports and adventure activities</td>
</tr>
<tr>
<td>5.10 Other attractions</td>
</tr>
</tbody>
</table>

Festivals and events

There are a number of festivals and events that occur in the Yarra Valley. These include:

- Rochford Summer Concert Series
- Grape Grazing Festival
- Longest Lunch
- Scarecrows Easter Gala
- Melba Festival
- Kellybrook Cider Festival
- Great Train Race
- Winterfest
- Vintage Sports Car Rally.
In addition to winery visits, other ‘must-do’ activities included hot air ballooning and a ride on the Puffing Billy steam train. The largest event in the region is the Grape Grazing Festival which is held over the February long weekend. Some of the larger wineries also hold their own events including St Hubert’s Music in the Vineyard and A Day on the Green concerts at Rochford’s winery. Many considered these events to be important to other wineries especially in terms of ‘accessing a lot of (younger) people who might not normally come out to the region’. Other events in the region include Yarra Track Vintage Sports Car Rally, Scarecrows Easter Gala Picnic and ShedFest.

**Mature Wine Regions: Coonawarra (South Australia)**

**Overview**

Coonawarra is located within South Australia's Limestone Coast 380km south east of Adelaide. Coonawarra is one of six wine regions on the Limestone Coast zone, an area which stretches from the Glenelg River on the Victorian border to Port MacDonnell, Robe, Tailem Bend and across to Bordertown. The village is located 60 kilometres inland and 10 kilometres north of the town of Penola. Promoted as Australia’s ‘other red centre’, the region is renowned for the superior winemaking properties of its rich red terra rossa soil over a limestone base. Coonawarra has a predominantly maritime climate with dry and moderately cool summers which results in a much longer ripening season, which in turn produces a unique flavour and tannin structure.

The first vines were planted in the 1880s at the vast Yallum Estate, a property established by John Riddoch who later established the Coonawarra Fruit Colony in 1891. Riddoch eventually built his winery (now Wynns’ Coonawarra Estate) and produced excellent wines; however, due to the effects of the Depression and the First World War, the cellars were converted to a distillery. It was only the Redman family who were able to maintain a continuous tradition of table wine production. The region did not establish its reputation as a viticulture area until the 1950s when Wynns and Penfolds purchased acreage on the back of resurgence in the table wine market. By the 1960s and through to the mid 1990s, the region experienced a resurgence with many investors and growers helping to secure Coonawarrra's status as a great wine region. Tourism, although limited by the region's isolation from a major city, is fostered by events such as the Coonawarra Cabernet Celebration and Barrel Auction and the annual Coonawarra Vignerons’ Cup held at the Penola Racecourse.

**Regional structure**

Apart from Wynns’ Coonawarra, the region is characterized by its relatively well-established, small family-owned wineries. The region’s size was also considered a defining structural factor: ‘Its compactness is very, very important where in the space of 15 kilometres in a straight line you’ve got 22 wineries. That’s very important’.

**Regional resources**

Wine and the region’s winemaking heritage were considered to be Coonawarra’s most important assets: ‘It’s not exactly close to Adelaide or Melbourne, so the people that actually come here specifically come for the wine’.

The region’s isolation and distance from the capital cities was considered a double-edged sword according to those interviewed. Many conceded that, while the region’s isolation and distance from the capital cities was a hindrance to tourism, the region’s location was also the key to Coonawarra’s identity as a wine region.

*We basically only refer to the region as being geographically flat and featureless and it’s more the historical reputation that generates the attraction … it’s an old region by most Australian wine regional standards. It’s got quite a successful reputation in terms of wine show successes … People will comment on it being flat. They have a perception of most of the other wine regions but then we have the plains and the story about the limestone and how it was formed … so geographically it’s different but it’s interesting.*

**Regional segments**

**Proximity to major population centres**

The Coonawarra wine region is situated on the Limestone Coast, which is 380 kilometres south of Adelaide.

**Winery and wine produced**

The region’s terra rossa limestone terroir with its pure underground water is undoubtedly the key factor in the region’s promotion as ‘Australia’s Other Red Centre’ which led one stakeholder to comment, ‘I guess that reflects some of the uniqueness we’ve got, the focus on the red wine and terra rossa is just then a great way of
promoting the whole unique feature of Coonawarra’. Cabernet sauvignon makes up over half of the 5500 hectares under vine followed by shiraz (20%) and merlot (7%).

**Primary food production and food service**

Although the food sector was not considered as a key attraction, there was an increasing awareness of the importance of food to the region: ‘I think that [food] has evolved because ten years ago it was all about wine now there’s a greater appreciation of finer cooking and more people looking for that experience I think’. Lack of infrastructure was seen as the main barrier to development: ‘Whilst wine is definitely a focus, you need more [restaurants] because you’ve got to get people out here for longer than a day’. Although mention was made that Coonawarra probably had the highest number of restaurants in Australia, some were less optimistic about developing food in the region:

*I think at this stage we’re oversupplied with restaurants for our population and another one is going to make it worse for everyone ... there are three or four weekends a year when the whole lot will be booked out but restaurants don’t survive on weekends.*

Another respondent was also of the opinion that there was a limit to how food could be successfully incorporated into the branding of the region already well known for its wine and its ‘goods, trees and fabulous skies’: ‘I can’t see how you can put food into that’. Overall, the branding of Coonawarra food (and the alliances required to develop it) is currently being worked out by the relevant stakeholders. Other food experiences in the region include:

- Limestone Coast Food Group Farmers Market
- Limestone Coast Pies and Platters Trail—gourmet pies and regional platters featuring hero ingredients of the Limestone Coast
- olive oil.

**Accommodation**

More broadly, the lack of infrastructure in the region was cited as a constraint to tourism. The Penola Coonawarra Tourist Information Centre mentioned that they have had little opportunity to use the South Australian Tourism Commission’s booking system, Connect SA, because of the minimal number (four) of Limestone Coast accommodation providers currently on the system.

**Natural attractions**

Apart from the interest given to Coonawarra’s terra rossa soil, the other quality attributed to the region was its vastness: ‘clean, green and fabulous skies’. Others noted the attractions of the surrounding areas—the coast, the Naracoorte Caves and the Blue Lake—within the Limestone Coast zone. Other attractions in this segment include:

- Coorong National Park
- Canunda National Park
- The Bool Lagoon Game Reserve (internationally significant as a refuge for migratory native wader birds)
- Piccaninnie Ponds National Park (diving and snorkelling)
- Tatanoola Caves Conservation Park.

**Marine/coastal aspects**

The Coonawarra region does not have any marine or coastal aspects as it is situated inland.

**Heritage**

Penola, the nearest town to Coonawarra, is the oldest town in the Limestone Coast. Penola’s ‘cultural and artistic heritage’, according to the South Australian Tourism Commission, ‘blends beautifully with Coonawarra’. Heritage attractions thus feature as a strong aspect of Coonawarra’s regional identity. Most notably, Sister Mary Mackillop, anticipated to be Australia’s first saint, founded the Sisters of Saint Joseph along with Father Julian Tenison in Penola over 130 years ago. Penola has numerous heritage listed buildings, including Yallum Park, a nineteenth century Victorian Mansion and the Woods MacKillop schoolhouse, where Sister Mary Mary MacKillop taught. Other heritage attractions include:

- the Mary MacKillop Interpretive Centre
- Petticoat Lane, the oldest residential section of Penola
- authentically preserved cottages converted to tourist accommodation.
Culture and the arts
The region has a strong sense of culture owing to its association with poets such as John Shaw Nielson, Adam Lindsay Gordon and Will Ogilvie. The John Shaw Neilson Acquisitive Art Competition has been conducted in Penola since 1992 where the winning entries are displayed in the Penola Visitor Centre.

Sports and adventure activities
There are 17 golf courses in the Limestone Coast Area, whilst other adventure activities that can be undertaken in the region include swimming in the Pool of Siloam at Beachport.

Other attractions
The John Riddoch Centre is in Penola and features history, arts and a local government centre. In addition, there are a number of places to go shopping in the area such as art galleries, antiques, gift shops, cafés and specialty shops.

Affiliations and Networks

Winery owners and operators
The Coonawarra Vignerons Association was regarded as ‘being seen by many as one of the most successful regional wine associations in Australia’. The association was, by far, the most cited organisation in terms of promotional efforts. As an indication, perhaps, of their extremely active role in the region, the association did not respond to requests to participate in this study, despite being contacted several times—and several messages being left—for an interview.

Food and wine groups
Limestone Coast Food Group currently represents approximately 74 members from a wide cross-section of the food sector community, from small micro-businesses to large companies. The group provides promotional, production and management support to all its members. The group is funded through its membership and occasional fundraising activities. Administrative support is provided by the Wattle Range Council through the Visitor Information Centre.

Visitor information centres
The Penola/Coonawarra Visitor Centre, in addition to providing information for tourists, acts as referral agent for accommodation providers and the wineries. Specific enquiries about wine and food are either referred on to the Coonawarra Vignerons Association or to the Limestone Coast Food Group.

Councils, shires and local government
- South East Regional Tourism Association
- The Wattle Range Council operates the region’s visitor information centre (see below).

State tourism organisations
- South Australia Tourism Commission
- Limestone Coast Tourism.

Relationship structure
Once again, the region’s location was cited as a key determining factor in the way the region is currently being promoted. The isolation, as one winery operator put it, ‘pulls us all together and makes us a very strong group so we do very specific regional promotion through our vignerons association’. In addition to the wine, Coonawarra’s ‘huge cooperative spirit’ was cited as another of the region’s distinguishing features. This cohesion was seen as vitally important in the visibility of Coonawarra as a region: ‘The region’s being promoted as Limestone Coast … Coonawarra gets an extremely limited separate promotion and we have to fight tooth and nail to get that’. It was acknowledged that such collective efforts are a more effective way of bringing journalists and media exposure to the region: ‘on an individual basis none of us could do that but as a group we can’.

The alliances between food and wine or, more specifically, between restaurants and wine, was also viewed as something that the region was doing well. Both The Limestone Coast Food Group and the Coonawarra Vignerons Association were mentioned numerous times as being effective marketing bodies for the region.
Analysing key characteristics of selected Australian regions

Coonawarra’s regional identity is best described by one stakeholder as ‘diverse, cohesive and progressive’ because of the growing ‘awareness of the increasing competition within the wine industry in terms of selling wine and competition for the tourist dollar’.

Table 12: Coonanwarra Regional Identity

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA Tourism Commission</td>
<td>Limestone Coast Food Group</td>
<td>VIC + Wineries + Accommodation</td>
<td>To Do</td>
</tr>
<tr>
<td>South East Regional Tourism</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coonawarra Vignerons Association</td>
<td>Penola Coonawarra Festival</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 13: Coonawarra Region Segments

<table>
<thead>
<tr>
<th>Coonawarra Regional Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1 Proximity to major population centres</td>
</tr>
<tr>
<td>6.2 Wineries and wine produced</td>
</tr>
<tr>
<td>6.3 Primary food production and food service</td>
</tr>
<tr>
<td>6.4 Accommodation</td>
</tr>
<tr>
<td>6.5 Natural attractions</td>
</tr>
<tr>
<td>6.6 Marine/coastal Aspects</td>
</tr>
<tr>
<td>6.7 Heritage</td>
</tr>
<tr>
<td>6.8 Culture and the arts</td>
</tr>
<tr>
<td>6.9 Sports and adventure activities</td>
</tr>
<tr>
<td>6.10 Other attractions</td>
</tr>
</tbody>
</table>

Festivals and events
The Coonawarra Cabernet Celebrations, the Penola and Coonawarra Festival and the Coonawarra Vignerons’ Race Day were cited as the most significant in terms of attracting visitors. Other events include:
- Port MacDonnell Bayside Festival in January
- Coonawarra Cellar Dwellers
- Robe Village Fair in November.
- Penola Coonawarra Arts Festival.

Rejuvenating Wine Regions: Rutherglen (Victoria)

Overview
The Rutherglen region is fortified wine country. It is situated near the Murray River in the north east of Victoria, which forms the border between New South Wales and Victoria. Many of the wineries and vineyards today were established before the turn of the Nineteenth century. The gold rush of the 1850s created a market for wine and it was in 1851 that the first vines were planted by Lindsay Brown, a pastoralist, following the advice of newly arrived German settlers. His lead was followed by a group of retired miners who established wineries that to this day bear their names, Campbell’s Winery, Gehrig Wines, Morris Wines and G. Sutherland Smith & Sons.

While there are grand brick buildings at wineries such as Fairfield, Mount Prior, All Saints and Gehrig Estate reflecting the prosperity of late Victorian era, there are now many new buildings of galvanised iron like those of present icons such as Chambers Rosewood winery. For over 150 years, the region has been able to deal with drought, depression and two world wars by producing heavy reds and fortified wines, which were very much in demand in the first half of the Twentieth century. The region overcame invasion of the phylloxera plague by introducing resistant root stock. Today the wineries—whilst still best known for their muscat, tokays, and heavy reds—have amongst the new entrants in the 1990s sparkling and white wine producers.

Regional structure
Many of the wineries which sprang up in the mid-nineteenth century during the gold rush are now run by fourth, fifth and sixth generations of the original family owners. Out of the twenty wineries in the area, only one winery
(Morris) is not owned by the family that operates it. Accordingly, it was thought that a constraint to further development in the area, such as accommodation and restaurants, was the difficulty of changing the mindset of owners who have ‘run their businesses essentially the same way since the nineteenth century’; whether or not this is actually the case, the generational structure of the region was seen as a strong feature of Rutherglen’s identity as a wine region: ‘the fact that there’s someone at Gehrig’s—Brian Gehrig—who’s a sixth generation winemaker … that’s unique’.

**Regional resources**

Although Rutherglen wine, or more specifically fortified wine, was considered to be the key asset of the region, there was a general view that this aspect of Rutherglen’s identity is not entirely accurate: ‘I think the public perception of Rutherglen is perhaps that it’s a more homespun area. Distinctive wines, but less sophisticated’. The core perceptions of the region, nevertheless, revolve around Rutherglen’s reputation for fortified wines and its significance as an older, established wine region.

**Regional segments**

**Proximity to major population centres**

Rutherglen is situated in North East Victoria, 3.5 hours drive from Melbourne and 4.5 hours drive from Canberra. Nearby towns are Wangaratta (30 minutes), Beechworth (45 minutes) and Albury/Wodonga (35 minutes).

**Wineries and wine produced**

The unique structure of Rutherglen’s wines is attributed to the region’s temperate climate and hours of sunshine. As such, the conditions which help to produce Rutherglen’s famous muscats and tokays, along with the artisan skills of the winemakers, also extend to the region’s shiraz and durif. One stakeholder put it this way: *It’s cool to have the [fortified] status that Rutherglen has in the area but unfortunately it now has the focus of a lot of tourism people and certainly wine writers that that’s all Rutherglen can do and that’s completely incorrect…the message that we need to send out is that there’s a range of other varieties: we can do excellent table wine, both red and white.*

One of the region’s significant wine experiences is the Muscat Trail along the Murray River which allows visitors to sample the classifications of muscat and tokay at various wineries in the region.

**Primary food production and food service**

Unlike the mature status accorded to Rutherglen wine, the role of food in the region is best described as emerging: ‘We’re not known for food … Rutherglen wouldn’t be the food ‘mecca’ but there are lots of fantastic things happening here but the world doesn’t know about it’. Many of the stakeholders interviewed pointed out that many of the restaurants in the region are ‘pretty well chef’s hat quality’. It was commented, however, that the link between food and wine, although acknowledged, had not yet been made ‘particularly meaningful’: ‘There’s no real integration between the way the food and the wine is presented, so there’s no clear message’.

Food experiences include:
- honey, trout, Murray cod, cherries, berries, nuts, chutneys and preserves
- award-winning Parker Pies Bakehouse pies
- cafés and restaurants serving local produce, including trout
- regional produce markets.

**Accommodation**

Rutherglen has a wide variety of accommodation for visitors (i.e. B&Bs, self-contained guest houses, motels, hotels, caravan parks) but the amount and quality of accommodation compared to competing regions were raised as issues: ‘[Our market] is more interested in the self-contained apartments-type thing, so we need more of that style’. Most stakeholders were, however, aware of the fact that investors were generally more prone towards investing in coastal regions: ‘You need to make a pretty strong case to convince an investor not to put it down at Lorne and put it up here’. As such, there were also concerns as to the ways Tourism Victoria is promoting Rutherglen as a wine and food region, as one stakeholder commented, ‘the capacity for those local governments to fund infrastructure is constrained and also the capacity to promote their regions in conjunction with the industries is constrained to a degree as well’.
Analysing key characteristics of selected Australian regions

Natural environment
As with the King Valley, the region is situated near a number of national and state parks including the National Alpine Park and Mount Buffalo National Park. As such, Rutherglen’s location in Victoria’s north east country was considered a factor in attracting tourists:

Definitely there’s a correlation between travelling through to the ski fields, both from a regional trail basis and also from Melbourne and our overall visitation to Beechworth ... we have very strong visitation flows from Bright and through to Beechworth and also from Milawa through to Beechworth ... so we get a fair bit of coverage that we wouldn’t normally get.

Other nature-based attractions in the region include:
- Lake Moodmere (rowing, bush walking, bird refuge)
- Bullers Bird Park
- Granthams Bend and Shaws Flat (Murray River walks)
- Police Paddocks (Murray River and Gooramadda State Forest).

Marine/coastal aspects
Rutherglen is inland, and, as such, does not have any marine or coastal aspects.

Heritage
Heritage tourism is a large part of Rutherglen’s regional identity. Once a major gold mining town, Rutherglen's history is reflected in the historic streetscapes and buildings which have been transformed into house antique and bric-a-brac shops, tea rooms and restaurants. In the words of one stakeholder: ‘Gold, Ned Kelly, Chinese history are big and that’s about 30% of people coming to see that sort of stuff’. Significant heritage attractions in the area include:
- Pfeiffer’s Bridge (historic bridge across Sunday Creek to vineyards)
- Great Northern Alluvial Mine (mine remnants of the first mine in the district)
- Fairfield House Victorian mansion
- Chinese Dormitory (living and eating quarters of Chinese vineyard workers during the 1870s)
- John Foorde (National Trust) Cemetery (1859–1886)

Culture and the arts
As with other wine regions that have a strong sense of history, Rutherglen’s cultural identity is closely linked to its heritage. Rutherglen’s main tourism body, The Rutherglen Wine Experience, draws visitors’ attention to ‘the ancient river red gums, idyllic pastoral scenes, historic villages, homely meals and genuine characters’. From the interviews with the stakeholders, this cultural heritage was articulated in a number of different ways: from the ways in which winemaking was perceived (‘the historic aspect of generations, family’); to the way Rutherglen was characterised in comparison to other wine regions (it has ‘soul, history and a lot of generational integrity’).

Sports and adventure activities
One of the major activities in the area is to go hot air ballooning at Rutherglen in order to experience the sunrise. There are also a number of golf courses in close proximity to Rutherglen as well as activities such as horse riding, canoeing, mountain biking, rock-climbing, abseiling, bushwalking and cross country skiing.

Other attractions
Another attraction of the region is a cycle along the Muscat Trail, which passes stands of river red gum and secluded billabongs along the Murray River. The trail provides the opportunity to visit 10 of the local wineries.

Affiliations and networks

Food and wine groups
North East Valleys Food and Wine is the marketing body of five regions in the north east. The organisation is funded through three local government areas and by each of the five vigneron’s associations in the valleys. The committee comprises one food and wine person from each of the areas, but the total number of stakeholders is approximately 300.
Visitor information centres
Rutherglen Wine Experience and Visitor Information Centre (RWE) is the peak tourism body in the region. RWE’s role is much broader than that of the Winemakers of Rutherglen as they are also involved in putting together a destination marketing plan for the region.

Councils, shires and local government
Indigo Shire funds the operation of the region’s visitor information centre.

State tourism organisations
The Rutherglen wine region is marketed under the Legends, Wine and High Country destination. Rutherglen is situated in North East Victoria, which was a significant strength in food and wine, and includes other areas such as the King Valley and Milawa. Tourism Victoria released the The North East Valleys Food and Wine Strategy, which is an initiative to progress cooperative marketing and development of the region. Part of this strategy was the development of the Rutherglen Destination Plan.

Relationship structure
At the broader level, many references were made to the region being marketed under the North East Valley banner. As one stakeholder commented, ‘we wanted to be members of North East Valley but there’s a real nagging feeling that there that by doing that we’re helping to promote North East Valley and we’re actually killing ourselves’. This view also extended to the work being conducted by NE Valley Food. The predominance of family-owned and operated wineries in the area was viewed as both a strength and weakness to the development of wine tourism in the region:

There are a lot of family wineries in the area so we stayed in our ways that we operate and we need to put on a fresh face to re-attract people to the area ... We’ve probably almost got to re-launch ourselves because we’ve become sort of old and conservative.

Rutherglen was seen as a region that had not yet caught up with the maturity of the market and that its core wine product offering needed to be enhanced. Whilst there was a view that Rutherglen should stick with its ‘muscat and tokay’ image rather than the more diversified image of ‘wine’, there was a general understanding that the region ‘is working on big changes’. The ‘young bloods’—the next generation—showcased in one of Rutherglen’s major events would provide the ‘new spin’ and help change public perception of the region as only being ‘old fashioned and fortified’. Nevertheless, the artisan skills and traditional values associated with the region continue to be qualities which are being cited as assets:

We need to reposition Rutherglen and shine all these old jewels back so people actually say: ‘Oh yeah, it’s really authentic, I actually spoke to the winemaker and it’s those sorts of things that people want these days because there are so many wine regions around.

This suggests that this strategy of marketing ‘authenticity’, with the region’s heritage at the core, might be the best approach for a region where most of the winemakers were perceived to be product rather than market driven. The candid view of one stakeholder provides a clue to the rejuvenation of Rutherglen, ‘If you take the wineries out of the region there’s nothing here and I say that in all honesty and some people think there’s a lot more but there isn’t … we need to develop layers of tourism product in the region’.

Table 14: Rutherglen Regional Identity

<table>
<thead>
<tr>
<th>Tourism Networks</th>
<th>Action Sets</th>
<th>Organisational Sets</th>
<th>Business Dyads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Victoria</td>
<td>NE Valleys Food &amp; Wine</td>
<td>VIC + Wineries + Accommodation</td>
<td>Tour operators and local wineries</td>
</tr>
<tr>
<td>Winemakers of Rutherglen</td>
<td>Young Bloods &amp; Bloody Legends</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Table 15: Rutherglen Region Segments

<table>
<thead>
<tr>
<th>Rutherglen Region Resources</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1 Proximity to major population centres</td>
<td>Beechworth, Bright, Milawa</td>
</tr>
<tr>
<td>7.2 Wineries and wine produced</td>
<td>Fortified reds: muscat and tokay</td>
</tr>
<tr>
<td>7.3 Primary food production and food service</td>
<td>Low profile</td>
</tr>
<tr>
<td>7.4 Accommodation</td>
<td>Limited</td>
</tr>
<tr>
<td>7.5 Natural attractions</td>
<td>Riverine but also close to scenic alpine parks and forests</td>
</tr>
<tr>
<td>7.6 Marine/coastal aspects</td>
<td>Not applicable</td>
</tr>
<tr>
<td>7.7 Heritage</td>
<td>Young Bloods and Bloody Legends</td>
</tr>
<tr>
<td>7.8 Culture and the arts</td>
<td>The Rutherglen Wine Experience</td>
</tr>
<tr>
<td>7.9 Sports and adventure activities</td>
<td>Golf, ballooning, canoeing, bushwalking</td>
</tr>
<tr>
<td>7.10 Other attractions</td>
<td>Cycle along the Muscat Trail</td>
</tr>
</tbody>
</table>

Festivals and events
The Young Bloods and Bloody Legends Event, in attracting a younger market to the region, was viewed as a vital part of Rutherglen’s rejuvenation. Other events include:

- Tastes of Rutherglen
- Winery Walkabout
- Rutherglen Agricultural Show
- Rutherglen Wine Show
- Campbell’s Riedel Masterclass and Dinner
- Tour de Muscat (cycling).

Rejuvenating Wine Regions: Barossa Valley (South Australia)

Overview
The Barossa Valley is South Australia’s most visited and best known tourist destination, 70 kilometres north of Adelaide. The region runs from Williamstown in the south and almost as far as Kapunda in the north, including the areas around Lyndoch, Tanunda, Nurioopta, Grenock and Stockwell. Often compared to the Napa Valley in California as a wine tourist destination, the Barossa Valley has a rich history. The lands that now include the Barossa were owned and occupied by the Ngadjuri and Peramangk people. The first British migrants settled in the region in 1839, followed by Lutheran Prussians in 1842 and later waves of Prussian pioneers who settled towns throughout the Barossa Ranges. This strong German heritage has had an enormous influence on the culture of the Barossa and remains a distinctive characteristic of the region’s food and architecture.

While the British encouraged the development of a commercial wine industry in the 1850s and 1860s, the real growth did not take place until the 1880s onwards. The Barossa’s development as a wine region has grown primarily from winegrowers selling grapes to wineries. Today a pool of 600 expert vignerons supply over 65 thousand tons of Barossa grapes to over 60 wineries each vintage. Together with Eden Valley the Barossa Valley is Australia’s largest single wine processing region in the country.

Regional structure
There are over 70 wineries and over 50 cellar doors in the region ranging from small family wineries to big international companies. Mention was made of the effect larger companies such as Fosters would make to the structure of the region—‘there’s a lot that aren’t family owned anymore’—and the unease it has brought to the wineries affected by multi-national mergers. In this context, the family aspect of the wineries was considered an asset that needed to be retained, as one winery stated, ‘We’re considered to be large but we’re very much a medium sized company … even though we’re a public company, it’s still about family’. Another stakeholder put it in terms of the appeal of smaller operation, ‘There are so many different wineries, but because they’re a big brand, any boutique wineries that are quite small would be different … we keep it cosy and we keep it friendly’.

Regional resources
The Barossa Valley’s international renown as a wine region—‘People literally get off the plane and come straight from the airport to the Barossa’—was considered the main motivator for visitors. Whether or not this
was also because the Barossa Valley is also one of Australia’s oldest wine regions was unclear; stakeholders nevertheless thought that the region’s heritage was an intrinsic part of the region’s appeal. The region’s location —‘beautiful scenery’— and proximity to Adelaide were also cited as Barossa’s main attractions.

**Regional segments**

**Proximity to major population centres**
The Barossa Valley is 1.5 hours drive north of Adelaide.

**Wineries and wine produced**
The Barossa Valley is Australia’s biggest wine region brand. As such, it is not known for producing a particular variety but rather a wide variety of wine:

> There are a great variety of different producers here so there is a wine or a wine style or a food style to suite every person’s taste and budget ... there’s different experiences from small, little boutique places that may only have one wine to larger wineries that not only focus on fruit in the Barossa but from Clare and sourcing from other regions.

**Primary food production and food service**
Barossa Valley food, as with wine, also has a unique cultural history. Many of the families from the first German settlers farm the same land today which means that traditional recipes and methods are still used to produce distinctive breads, smoked meats and condiments: ‘We’ve still got butchers who smoke their meats and their small goods in the traditional way of the smoke houses burning oak barrel shavings and the mallee roots. We have bakeries that operate in the same way’. Whilst the profile of food was definitely considered to be secondary to wine, most were of the opinion that food has a pivotal role in the promotion of the region: ‘It’s been recognised that there are a lot of wine regions now and we need to diversify and try and stay a step ahead of the rest so there’s a huge focus on the food at the moment’. Significant food experiences include:

- Barossa Farmers Market
- Butcher, Baker, Winemaker Trail
- Yalumba Harvest Market—where producers in the district sell their foods

**Accommodation**
In terms of accommodation in this region, B&B accommodation appears to match the short break and luxury visitor attracted to the region (according to SA Tourism, in 2003 the Barossa had the highest proportion of nights spent in a B&B or guesthouse accommodation (10%) of any SA region).

**Natural attractions**
Although not generally known for its nature-based attractions, the region does have many parks, reserves and national parks. The historic town of Bethany and the vineyards of Tanunda are part of the Heysen Trail, South Australia’s longest walking trail. Other attractions include:

- Sandy Creek Conservation Park (haven for 130 bird species)
- Pirra Wirra Recreation Park (incorporates the Barossa goldfields trail)
- Kaiser Stuhl Conservation Park
- Mount Crawford Forest.

**Marine/coastal aspects**
The Barossa Valley is inland, and, as such, does not have any marine/coastal aspects.
Analysing key characteristics of selected Australian regions

Heritage
Apart from wine, the Barossa Valley is also best known for its rich German and English heritage. As one stakeholder pointed out, ‘Heritage is something that ranks really highly in surveys that have been done with visitors—we’ve got a strong and visible built heritage and in our food tradition’. Significant heritage experiences include:

- Heritage Town Walks (self-guided walks)
- Barossa Archival Museum
- Tanunda Churches
- Luhrs Cottage (1848 home to the first Lutheran schoolteacher)
- Bethany Village (one of the few ‘hufendorf’—a Silesian village layout—remaining).

Culture and the arts
The Barossa Valley’s cultural identity is similar to other regions with a rich history: heritage is an inextricable part of its culture. In fact, it is difficult to mention many of the Barossa’s attractions without also mentioning its particular historical significance. Other cultural attractions include:

- Mengler Hill and Sculpture Park Lookout
- The Barossa Reservoir ‘Whispering’ Wall

Sports and adventure activities
The Barossa region contains four 18 hole golf courses and two 9 hole golf courses.

Other attractions
There are a range of day spas and retreats in the area including Endota Spa and Sanctuary health and healing centre. In addition, there is the 57 kilometre Barossa Scenic Heritage Drive and the Lyndoch Lavender Farm.

Affiliations and networks

Winery owners and operators
Barossa Wine and Visitor Centre is a member-based organisation with two streams of membership—the wine sector and tourism operators. The Centre runs a commission-based accommodation booking service and is due to take online bookings with Connect SA.

Food and wine groups
Food Barossa is a regional food brand that was originally developed to retain the region’s German food heritage and to help ‘stop the region becoming a monoculture with grapes and vines’. The group has now broadened its focus to the marketing of the regional food.

Barossa’s Farmers Market represents 70 food producers and growers in the region. It is a non-profit, self-funded group which aims to put people in touch with real food from homes and farms in the Barossa region.

Visitor Information Centres
Barossa Wine and Visitor Centre is the main visitors centre in the area.

<table>
<thead>
<tr>
<th>Table 16: Barossa Valley Regional Identity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tourism Networks</strong></td>
</tr>
<tr>
<td>SA Tourist Commission</td>
</tr>
<tr>
<td>Barossa Wine and Visitor Centre</td>
</tr>
</tbody>
</table>

56
Table 17: Barossa Valley Region Segments

<table>
<thead>
<tr>
<th>Table 17: Barossa Valley Region Segments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Barossa Valley Regional Resources</strong></td>
</tr>
<tr>
<td>8.1 Proximity to major Population Centres</td>
</tr>
<tr>
<td>8.2 Wineries and wine produced</td>
</tr>
<tr>
<td>8.3 Primary food production and food service</td>
</tr>
<tr>
<td>8.4 Accommodation</td>
</tr>
<tr>
<td>8.5 Natural Attractions</td>
</tr>
<tr>
<td>8.6 Marine/Coastal Aspects</td>
</tr>
<tr>
<td>8.7 Heritage</td>
</tr>
<tr>
<td>8.8 Culture and the Arts</td>
</tr>
<tr>
<td>8.9 Sports and Adventure Activities</td>
</tr>
<tr>
<td>8.10 Other Attractions</td>
</tr>
</tbody>
</table>

**Festivals and Events**

There was a feeling that the Barossa Valley is now being promoted as an ‘events’ region and that this strategy was a positive move towards attracting ‘the twenty-year-olds and the twenty-five-year-olds who are our future drinkers’. It was thought that word of mouth was the main way to market the region and that festivals play a major role in this promotion.

Other than the weekly Barossa Farmers Market and Barossa Craft Market, the Barossa Valley is host to three ‘not to be missed’ events: the biennial, week-long Barossa Vintage Festival is billed as Australia’s foremost wine festival; the Barossa Gourmet Weekend which unites cooks, chefs and restaurants with wineries and Barossa under the Stars, an outdoor event featuring a top international performer (past stars have included Rod Stewart and Elton John). Other events include:

- Barossa Jazz Weekend
- Wolf Blass Sea to Vines (a recreational road ride)
- A Day on the Green (hosted by Peter Lehmann wines)
- Valley Hot Rodders ‘Cruise On’.
Chapter 5

SUMMARY AND RECOMMENDATIONS

The findings from this study provide insights into the phases of growth of wine regions and the characteristics that these phases exhibit. Each of the regions studied displayed varying levels of development and activity that assist in their development. In summarising the research, the following findings were made concerning the composition of wine regions at their various stages of development.

Emerging Wine Regions

The two wine regions in this category, King Valley in Victoria and Adelaide Hills in South Australia were the least developed as wine regions and yet showed a number of characteristics that would enable them to move quickly to the next stage of development. In particular, these regions had:

- very strong natural attractions
- strong cultural heritage attractions within the immediate area
- a number of festivals and events that attracted visitors to the region.

To varying degrees, the emerging wine regions lacked:

- a unifying theme (e.g. Mediterranean background)
- sufficient accommodation
- proximity to a major city (particularly Adelaide Hills).

King Valley

In terms of the King Valley, an example of the emerging nature of this region is the name change of the King Valley Vignerons Association from the King Valley Grape Growers Association. The group now represents a larger proportion of winemakers, not just grape growers. The other group in the region is the Wines of the King Valley, which concentrates more on the marketing of the region. The organisation has managed to secure State Government funds in order to stage a number of events to showcase the region. The Wines of the King Valley also has a seat on the board of North East Valley Food and Wine Group. Other organisations involved in the region are the King Valley Tourism Association, the Visitor Information Centre (situated in Wangaratta) and the Rural City of Wangaratta. Stakeholders in the region felt that these three organisations are coming together much more than in the past. Moreover, the Wines of the King Valley group has bought fresh ideas that reflect the emerging nature of the region.

Adelaide Hills

The Adelaide Hills Wine Region represents about 200 growers and aims to enhance fruit and wine production and marketing of the regional brand. The main food group is the Adelaide Hills Food Network, which was established in 1998 and aims to develop and promote the ‘Adelaide Hills’ brand in the local community and the international gourmet scene. A representative from the Adelaide Hills Food Network is also a member of the Premier’s Food Council, which are involved in developing projects such as the Food Export Centre. The Adelaide Hills Visitor Centre is in Hahndorf and is funded by the Adelaide Hills Council, the District Council of Mt Barker and the Adelaide Hills Regional Development Board. These three organisations also fund Adelaide Hills Tourism, which implements the marketing strategies on behalf of the South Australian Tourism Commission for the region. Adelaide Hills Tourism encourages cooperative marketing campaigns with neighbouring regions such as the Barossa, Murraylands and the Fleurieu Peninsular. An example of the emerging nature of the region is the apparent problem with funding, management and coordination of regional events and the Visitor Information Centres.

Growing Wine Regions

The two wine regions examined in this category were the Mornington Peninsula in Victoria and McLaren Vale in South Australia. It is the growing regions that exhibited the largest and strongest levels of attributes—this is an interesting finding as it was assumed that the Mature Regions would exhibit this level of strength. In particular, these regions showed the following:
• close proximity to Major Capital cities
• close proximity to natural attractions such as beaches and parks
• heritage aspects dating back to the early 1800s
• established range of events
• concentration of wineries that promote touring and wine tasting
• both regions described as ‘boutique’ wine regions.

Mornington Peninsula
The major organisations in the region are the Mornington Peninsula Vignerons Association, the Mornington Peninsula Wine Industry Partnership and Mornington Peninsula Gourmet. Mornington Peninsula Tourism is responsible for designing the marketing campaigns linked with Tourism Victoria. The region has created strong links between its major stakeholders which is evident across all of the network categories, however, the region’s link to food and wine need to be made stronger in order to pull visitors away from the beaches and golf courses. Although there was a cohesive approach to tourism, there was an underlying fragmentation of different agendas according to one stakeholder. A consensus has been reached about the region as a ‘boutique’ destination.

McLaren Vale
The major organisation in the region is the McLaren Vale Grape Wine and Tourism Association, which represents over 350 growers, wine makers, accommodation operators, restaurants, food producers and tourism operators. The history of this organisation can be traced back to the 1870s and has changed from a voluntary organisation to one with four full-time staff. The other important organisation in the region is Fleurieu Peninsula Food, which is the food industry focal point in the region. The McLaren Vale and Fleurieu Peninsula Visitor Information Centre is run by a partnership of the McLaren Vale Grape Wine and Tourism Association and the Visitor Information Centre. It does not receive funding from the local council, instead, it relies on membership fees and wine industry funding. As a result, the Visitor Information Centre has a more commercially realistic focus in regard to the types of services that are offered.

Maturing Wine Regions

Yarra Valley and Coonawarra
The two mature wine regions were Yarra Valley and Coonawarra. These regions showed the following attributes:
• situated inland
• well established wineries
• mainly cottage and B&B accommodation
• high heritage value
• a range of natural attractions.

In regard to the Yarra Valley, there was a perception that there were too many groups involved in wine tourism in the region, and as a result the region was being marketed in an ad hoc fashion. In addition, there were problems associated with big players and little players and a need to understand that the smaller wineries are able to benefit from the marketing pull of the larger international wineries. The Coonawarra wine region was seen to pull together as a result of its isolated location (380 kilometres from Adelaide). There were also good alliances between local restaurants and wine. A difference between the two areas was that Yarra Valley was the brand and the region, whereas Coonawarra was the brand and the Limestone Coast was the region.

Rejuvenating Wine Regions

Rutherglen and Barossa Valley
The two rejuvenating wine regions were Rutherglen and Barossa Valley. These regions contained the following attributes:
• rural settings away from population centres
• strong heritage values
• established events
• diverse range of activities.
The two wine areas contrasted in that the Rutherglen wineries were mostly family-owned and that the Barossa Valley wineries were mostly owned by international companies, which has implications for the types of networks that exist in the region. It was felt that it was important to retain the family-friendly nature of the smaller wineries to balance out the offerings of the Barossa Valley experience. In terms of networks, the Barossa Valley has the Barossa Wine and Visitors Centre that runs a commissioned-based accommodation booking service and is due to take online bookings with Connect SA. In contrast, the Barossa’s Farmers Market represents the food producers and growers in the region and is a non-profit, self-funded group, which aims to put people in touch with real food from homes and farms in the Barossa Region.

The rejuvenating stage of Rutherglen was highlighted by stakeholders, who maintained that the area needs to relaunch itself, as the area had become old and needed to re-attract visitors. There was a feeling that the region was working on big changes.

In conclusion, each of the various regions contained strengths and weaknesses that contributed to their success as a wine and food tourism destination. These attributes are captured in Table 18 and provide some indication of the successful characteristics of the regions. It would appear that the growing and mature regions contain the greatest number of successful attributes.

Table 18: Regional identities
Perception of strength—Emerging

<table>
<thead>
<tr>
<th></th>
<th>Feature</th>
<th>Perception of strength</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>King Valley</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proximity</td>
<td>Great Alpine Loop</td>
<td>Medium</td>
</tr>
<tr>
<td>Wine</td>
<td>Mediterranean Diversity</td>
<td>High</td>
</tr>
<tr>
<td>Food</td>
<td>Milawa region and growing</td>
<td>Medium</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Limited</td>
<td>Low</td>
</tr>
<tr>
<td>Attractions and activities <strong>N</strong></td>
<td>Outdoor adventure</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities <strong>H</strong></td>
<td>Ned Kelly Country</td>
<td>Medium</td>
</tr>
<tr>
<td>Events</td>
<td>La Dolce Vita and Weekend Fit for a King</td>
<td>Medium</td>
</tr>
<tr>
<td><strong>Adelaide Hills</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proximity</td>
<td>20 minutes from Adelaide</td>
<td>High</td>
</tr>
<tr>
<td>Wine</td>
<td>Requires Branding</td>
<td>Low</td>
</tr>
<tr>
<td>Food</td>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Mostly B&amp;Bs, lacks larger facilities</td>
<td>Medium</td>
</tr>
<tr>
<td>Attractions and activities <strong>N</strong></td>
<td>Seasonal attractions</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities <strong>H/C</strong></td>
<td>Merging of heritage and cultural</td>
<td>Medium</td>
</tr>
<tr>
<td>Events</td>
<td>Harvest Festival and various others</td>
<td>Medium</td>
</tr>
</tbody>
</table>

**N**: Nature  **H**: Heritage  **C**: Culture
### Table 18: Regional identities
**Perception of strength—Growing**

<table>
<thead>
<tr>
<th>Mornington Peninsula</th>
<th>Feature</th>
<th>Perceived strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity</td>
<td>&lt; 1 hour from Melbourne</td>
<td>High</td>
</tr>
<tr>
<td>Wine</td>
<td>Pinot Noir</td>
<td>High</td>
</tr>
<tr>
<td>Food</td>
<td>Growing</td>
<td>Medium</td>
</tr>
<tr>
<td>Accommodation</td>
<td>B&amp;Bs good fit with market</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities C</td>
<td>Indulgent experiences</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities N</td>
<td>Water activities</td>
<td>High</td>
</tr>
<tr>
<td>Events</td>
<td>Harvest Festival Winter Wine Weekend</td>
<td>High</td>
</tr>
<tr>
<td><strong>McLaren Vale</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proximity</td>
<td>To other regions</td>
<td>Medium</td>
</tr>
<tr>
<td>Wine</td>
<td>Shiraz and full-bodied reds</td>
<td>High</td>
</tr>
<tr>
<td>Food</td>
<td>Culinary heritage</td>
<td>High</td>
</tr>
<tr>
<td>Accommodation</td>
<td>B&amp;Bs good fit with market</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities N</td>
<td>Vines and coast</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities C</td>
<td>Food and wine experience</td>
<td>High</td>
</tr>
<tr>
<td>Events</td>
<td>Sea and Vines Festival</td>
<td>High</td>
</tr>
</tbody>
</table>

N: Nature  H: Heritage  C: Culture

### Table 18: Regional identities
**Perception of strength—Mature**

<table>
<thead>
<tr>
<th>Yarra Valley</th>
<th>Feature</th>
<th>Perceived strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity</td>
<td>&lt;1 hour from Melbourne</td>
<td>High</td>
</tr>
<tr>
<td>Wine</td>
<td>International, premium</td>
<td>High</td>
</tr>
<tr>
<td>Food</td>
<td>Developing brand recognition</td>
<td>Medium</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Wide variety but mostly B&amp;Bs</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities C</td>
<td>Wine</td>
<td>High</td>
</tr>
<tr>
<td>Attractions and activities N</td>
<td>Scenic valley</td>
<td>Medium</td>
</tr>
<tr>
<td>Events</td>
<td>Grape Grazing Festival</td>
<td>Medium</td>
</tr>
<tr>
<td><strong>Adelaide Hills</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proximity</td>
<td>Isolated</td>
<td>Low</td>
</tr>
<tr>
<td>Wine</td>
<td>Cabernet Sauvignon</td>
<td>High</td>
</tr>
<tr>
<td>Food</td>
<td>Developing the brand</td>
<td>Medium</td>
</tr>
<tr>
<td>Accommodation</td>
<td>Limited</td>
<td>Medium</td>
</tr>
<tr>
<td>Attractions and activities</td>
<td>Heritage H and Cultural C</td>
<td>High</td>
</tr>
<tr>
<td>Events</td>
<td>Penola Coonawarra Festival</td>
<td>High</td>
</tr>
</tbody>
</table>

N: Nature  H: Heritage  C: Culture
### Table 18: Regional identities
**Perception of strength—Rejuvenating**

<table>
<thead>
<tr>
<th>Region</th>
<th>Feature</th>
<th>Perception of strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rutherglen</td>
<td>Proximity</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Great Alpine Loop</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wine</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Fortified wines</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>Low</td>
</tr>
<tr>
<td></td>
<td>Low Profile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accommodation</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Limited</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Attraction &amp; activities H</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Strong, visible</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Events</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Young Bloods and Bloody Legends</td>
<td></td>
</tr>
<tr>
<td>Barossa Valley</td>
<td>Proximity</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>1.5 hour from Adelaide</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Wine</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>International, diversity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Food</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Increasing focus</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accommodation</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>B&amp;Bs good fit with market</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Attraction &amp; activities H</td>
<td>High</td>
</tr>
<tr>
<td></td>
<td>Strong, visible</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Events</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>Barossa Vintage Festival, Barossa Under the Stars</td>
<td></td>
</tr>
</tbody>
</table>

**N:** Nature  **H:** Heritage  **C:** Culture
Appendix A: Introductory Letter Consent Form

Victoria University

Information for Participants in the In-depth Interviews

We would like to invite you to be part of a study of Food and Wine Tourism

This study will involve:

• An investigation into the important roles that food and wine play in attracting tourists to a destination.
• In-depth interviews and surveys to more fully understand the characteristics of wine regions and their wineries as well as the motivations and characteristics of wine tourists.

Project Outcomes will include:

• Much needed information about who the wine tourists are, their motivations for visiting a wine region and how other lifestyle products can enhance the experience of the region.
• The development of a typology of food and wine regions. The stages in development of wine regions will be identified and the characteristics of wineries in terms of the total wine tourism product will be explored. The typology will also include provision of food, accommodation, winery tours and other components of the total wine tourism experience.

Benefits

• The major benefit of this project is that it will provide vital information that can be used to further develop and market food and wine regions.

The Interviews

• The interview questions are not intrusive; they are general in nature and entirely voluntary.
• In order to ensure that an accurate record is kept of the interview a tape recording will be made, which will be later transcribed, and notes will be taken.
• Participants may withdraw at any time and their contributions erased from the record.
• A consent form for participants accompanies this information sheet and provides contact details for the researchers if further information is required.

Any queries about your participation in this project may be directed to the researcher (Name: Associate Professor Linda Roberts Ph 9919 1320 or Associate Professor Margaret Deery Ph 9919 4626). If you have any queries or complaints about the way you have been treated, you may contact the Secretary, University Human Research Ethics Committee, Victoria University of Technology, PO Box 14428 MC, Melbourne, 8001 (telephone no: 03-9919 4710).
Victoria University

Consent Form for Participants Involved in Interviews

INFORMATION TO PARTICIPANTS

We would like to invite you to be part of a study of Food and Wine Tourism

This project investigates the relationship between the wine tourist and the wine region and its wineries. The project will provide much needed information about who the wine tourists are and their motivations for visiting a wine region. Further, a typology of wine regions and wineries will be developed. The stages in development of wine regions will be identified and the characteristics of wineries in terms of the total wine tourism product will be explored. The typology will encompass, the size, location and organisational structure of the wineries, but will also include provision of food, accommodation, winery tours and other components of the total wine tourism experience. The major benefit from the project will be obtained through matching winery type and wine tourist profiles. With this knowledge the wineries and wine regions will be able to develop infrastructure to meet the wine tourist’s needs. The project will involve in-depth interviews and surveys to more fully understand the characteristics of wine regions and their wineries as well as the motivations and characteristics of wine tourists.

CERTIFICATION BY PARTICIPANT

I, of

certify that I am at least 18 years old and that I am voluntarily giving my consent to participate in an interview in the study entitled ‘Food and Wine Tourism’ being conducted at

by Kirsty Tunes/Associate Professor Linda Roberts/Associate Professor Margaret Deery

I certify that the objectives of the interview, together with any risks to me associated with the procedures listed hereunder to be carried out in the interview, have been fully explained to me by: Kirsty Tunes/Associate Professor Linda Roberts/Associate Professor Margaret Deery and that I freely consent to participation in the interview.

Procedures

The in-depth interview conducted by one of the principal investigators to investigate the elements of successful food and wine tourism. The interview will be taped and notes taken as a means of recording data accurately. Anonymity of participants will be assured.

I certify that I have had the opportunity to have any questions answered and that I understand that I can withdraw from this interview at any time and that this withdrawal will not jeopardise me in any way.

I have been informed that the information I provide will be kept confidential.

Signed: .................................................

Witness other than the researcher:  ... Date: ....................

Any queries about your participation in this project may be directed to the researcher (Name: Associate Professor Linda Roberts Ph 9919 1320 or Associate Professor Margaret Deery Ph 9919 4626). If you have any queries or complaints about the way you have been treated, you may contact the Secretary, University Human Research Ethics Committee, Victoria University of Technology, PO Box 14428 MC, Melbourne, 8001 (telephone no: 03-9919 4710).
Appendix B: Questions for Key Stakeholders

INTERVIEW GUIDE FOR KEY STAKEHOLDERS AND WINERY OPERATORS

Food and Wine Tourism

AIMS
1. To gain a better understanding of the food and wine region in relation to tourism.
2. To identify the strategies being used within the region to promote their product to tourists.
3. To gain an understanding of the product being offered in the region.
4. To identify barriers experienced in the process of building the regional brand.
5. To identify strategic alliances being developed to assist the region in gaining greater recognition.

OBJECTIVES
1. To identify the characteristics of each winery in the case studies in terms of:
   • Grape varieties grown
   • Wines produced
   • Size in terms of volume of production
   • History of the winery in terms of development, age etc
   • Organisational structure of the winery in terms of ownership
   • Cellar door sales in relation to sales through other channels – most likely given as a % of the total rather than absolute figures
   • Mission statement
   • Approach to environmental sustainability in terms of action/activities
   • Infrastructure offered within the winery precincts, e.g. tasting room, restaurant or cafe, shop and types of produce sold, accommodation and type, winery tours, presentations/talks/audio-visual, picnic area, walking tracks, events, concerts, conferences, other entertainment etc
   • Products sold
   • Approach to marketing and promotion

2. To obtain insights into the operator’s perceptions of the wine and food tourists that visit the winery and the region.

3. To obtain insights into the regional wine industry structure in terms of:
   • Industry organisation membership
   • Industry alliances within the wine, food and tourism areas
   • Relationship with Visitor Information Centres, Local Councils etc
   • Regional Branding

4. To obtain insights into the barriers or difficulties that the region may be facing.
Analysing key characteristics of selected Australian regions

THIS WILL BE A SEMI-STRUCTURED QUESTIONNAIRE WITH ALTERNATIVES PROVIDED AS OFTEN AS FEASIBLE TO REDUCE INTERVIEW TIME. SOME OF THE QUESTIONS COULD BE PROVIDED IN ADVANCE FOR INFORMATION GATHERING THAT REQUIRES SIMPLE FACTUAL ANSWERS.

QUESTIONS

THE WINERY
In order to build a profile of your winery we need to gather some important information about your product:

Some of these questions may be answered from printed lists and/or brochures that the operator may have:

Open-ended question:

1. How would you describe your winery?

Questions that may be answered from brochures and lists available at the winery:

2. What grape varieties do you grow?

3. What wines do you produce (distinguish between what is produced at the winery and what is sold there)?

4. What is the approximate annual production volume of this winery?

5. What has been the history of this winery since it was first established (in terms of development)?

6. How would you describe the ownership of this winery (provide list of alternatives from independently owned to corporate ownership)?

7. What is your mission statement?

Structured Questions:

8. Through what channels do you sell your wine?

9. What are the approximate proportions of sales through each channel?

<table>
<thead>
<tr>
<th>Channel</th>
<th>Use Yes/No</th>
<th>% Sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cellar Door only</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winery Shop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Distributor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retailers/Wine Merchants</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Order</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Export</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>100</td>
</tr>
</tbody>
</table>
10. What infrastructure and services do you provide (provide a list of alternatives)?

<table>
<thead>
<tr>
<th>Service</th>
<th>Offered Yes/No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cellar Door</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tasting Room</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winery Shop</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cafe</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Presentations/AV</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Winery Tours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gallery</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Picnic area</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Walking Tracks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Concerts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conferences</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

11. Of these services which do you feel is the most successful?

12. How do you market your product? To whom? In what areas (target markets, e.g. Victoria, Melbourne, UK), from what outlets, e.g. supermarkets, wine merchants?
Analysing key characteristics of selected Australian regions

<table>
<thead>
<tr>
<th>TARGET MARKETS</th>
<th>NAMES</th>
<th>OUTLET TYPES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>States</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cities</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

13. What type of promotion do you use?

<table>
<thead>
<tr>
<th>PROMOTION</th>
<th>USE YES/NO</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Television</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Newspapers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Magazines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Radio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

14. What information do you have available to your customers on the other attractions (local wineries, produce) of the areas?

15. What do you consider to be the constraints on the success of your business?
QUESTIONS FOR THE WINERY OPERATOR ABOUT THE WINE AND FOOD TOURISTS

1. What attracts visitors to this i) winery, ii) region?

<table>
<thead>
<tr>
<th>ATTRACTION</th>
<th>Winery Yes/No</th>
<th>Region Yes/No</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Scenery</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wines/Wineries</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Restaurants/Food</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>VFR</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. How long do they come for (provide a list of alternatives)?

<table>
<thead>
<tr>
<th>LENGTH OF STAY</th>
<th>APPROX. PROPORTIONS % OR JUST RANKING OF FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day Trip</td>
<td></td>
</tr>
<tr>
<td>Overnight</td>
<td></td>
</tr>
<tr>
<td>Short Break 2-3 days</td>
<td></td>
</tr>
<tr>
<td>Holiday &gt;3 days</td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
</tbody>
</table>
**Analysing key characteristics of selected Australian regions**

3. Who are they (provide a list of alternatives)?
4. Who spends most on wine purchases (provide list of alternatives)?
5. Who spends most on meals in the restaurant (provide list of alternatives)?
6. Who spends most in the shop (provide list of alternatives)?
7. Who visits but does not spend much (provide list of alternatives)?
8. Who are the return visitors (provide list of alternatives)?

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>Q3 Visitors % or Rank</th>
<th>Q4 Most on Wines</th>
<th>Q5 Most on Meals</th>
<th>Q6 Most in Shop</th>
<th>Q7 Spend Least</th>
<th>Q8 Return Most Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>AGE RANGE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OCCUPATIONAL GROUP</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Managerial</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tradespeople</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retirees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FAMILY STRUCTURE</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GENDER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
QUESTIONS FOR THE WINERY OPERATORS ABOUT THE REGION

10. How would you describe this region?
   - What are its key features?
   - What is it known for?
   - Would you consider wine and food to be the main motive for tourists visiting the region?

11. How would you describe the structure of the wine industry in your region?

12. How would you compare/describe your winery in relation to other wineries in the region?

13. Which wineries are similar, which ones are different? In what ways?

14. How is the region being promoted?

15. What would you say are the distinguishing marketing features of the region?

16. What are the target markets for the region?

17. Within this region are there any networks/alliances between the food and wine establishments?

18. Does your business have any alliances with other local businesses?

19. If yes, has this helped the success of your business?

20. What range of products is incorporated into this alliance?

QUESTIONS FOR OTHER KEY STAKEHOLDERS

Local Food and Wine Groups and Regional Branding
1. Who does the Group represent?
2. Is there a fee for organisations to become members of the Group?
3. How many members do you now have?
4. How is the Group funded?
5. Does funding come from a regional (local government) council?
6. Can you outline the aims and objective of Group?
7. Are wineries in the region working with the region’s tourism and hospitality industry to build the regional brand?
8. Can you describe the regional brand?
21. How would you describe this region?
   - What are its key features?
   - What is it known for?
   - Would you consider wine and food to be the main motive for tourists visiting the region?
22. How would you describe the structure of the wine industry in your region?
Analysing key characteristics of selected Australian regions

23. Which wineries are similar, which ones are different? In what ways?

24. How is the region being promoted?

25. What would you say are the distinguishing marketing features of the region?

26. What are the target markets for the region?

27. What are the cellar door opening hours across the region?

28. Are all members of the wine industry in the region operating their businesses as tourism enterprises?

29. What products other than wine do the wineries, that are open to tourists, tend to sell?

30. What alliances have been established between the Group and members of the wine and tourism industries?

31. Are there any barriers or difficulties making it hard to develop food and wine tourism in the region?

32. Are there any other groups in the region that are instrumental in the promotion of the region's wine and food product?

33. What good environmental management practices do the food and wine producers actively engage in?

VISITOR INFORMATION CENTRES

1. What services do the information centres offer?
2. Do local businesses have to pay annual fees for services?
3. Do information centres rely on volunteer employees to operate?
4. Do tourism centres operate as booking agents?
5. Do they get a commission for this service?
6. What relationship does the information centre have with the winery operators and other businesses in the region that they serve?
7. What alliances are there in the region for food and wine? Within this region are there any networks/alliances between the food and wine establishments?
8. What range of products is incorporated into these alliances?
9. Are wineries in the region working with the region’s tourism and hospitality industry to build the regional brand?
10. How is the region being promoted?
11. What would you say are the distinguishing marketing features of the region?
12. What are the target markets for the region?
References

ACIL (2002) Pathways to profitability for small and medium wineries.
Bureau of Tourism Research (2002) National and International Visitor Surveys
Davies and? Consumer perspectives on enhancement factors for developing food and wine tourism, PowerPoint presentation
Deery M et al. (2003) Developing regional tourism; the role of food and wine entrepreneurs, PowerPoint presentation
Analysing key characteristics of selected Australian regions


South Australian Tourism Commission (2001) Wine tourism market research

South Australian Tourism Commission (2003) Cellar Door market research


Sparks B et al. (2003) ‘Good living’ tourism – a review of selected food and wine regions of South Australia, Victoria and Queensland.


AUTHORS

Associate Professor Linda Roberts
Linda Roberts was Associate Professor in the School of Hospitality, Tourism and Marketing at Victoria University. She holds a Bachelor of Science (First Class Honours), Postgraduate Certificate of Education (First Class), Master of Science and a PhD. She is Head of the Hospitality Discipline Area and Course Director for the Master of Business in Hospitality Management and the Master of Business in Hospitality Management (Professional Practice) at Victoria University, Melbourne. She has thirty-six years of experience as an educator and academic with twenty-seven years in higher education in the hospitality field. Her research interests encompass the areas of: new product development and innovation; new product adoption and the factors affecting decision making in the adoption and purchasing of new products; food and wine tourism; identification of innovative strategies to meet visitors needs in the motel industry; and innovation change management in small and medium tourism enterprises. Her research in recent years has been largely focused on Sustainable Tourism Cooperative Research Centre projects in Australia in the capacity of both team member and project leader. Email: linda.roberts@vu.edu.au

Professor Margaret Deery
Professor Margaret Deery is Professorial Research Fellow with the Centre for Tourism and Services Research and Professor in Tourism Management at Victoria University. She holds a BA, Dip Ed, MA and PhD. She has extensive experience in research on events and business events, visitor information centres, social impacts of events and tourism, and food and wine. She has published widely and worked on a number of funded research projects. Email: marg.deery@vu.edu.au
 Particularly relevant programmes and communication strategies include:

- Travel and tourism industry
- Academic researchers
- Government policy makers

EC3, a wholly-owned commercialisation company, takes the outcomes from the relevant STCRC research; develops them for market; and delivers them to industry as products and services. EC3 delivers significant benefits to the STCRC through the provision of a wide range of business services both nationally and internationally.

Chairman: Stephen Gregg
Chief Executive: Ian Kean
Director of Research: Prof. David Simmons

EC3 For Sustainable Tourism Pty Ltd
Gold Coast Campus Griffith University
Queensland 4222 Australia
ABN 53 077 407 286

Telephone: +61 7 5552 8172 Facsimile: +61 7 5552 8171
Website: www.crctourism.com.au
Email: info@crctourism.com.au
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.

Introduction

The STCRC has grown to be the largest, dedicated tourism research organisation in the world, with $187 million invested in tourism research programs, commercialisation and education since 1997.

The STCRC was established in July 2003 under the Commonwealth Government’s CRC program and is an extension of the previous Tourism CRC, which operated from 1997 to 2003.

Role and responsibilities

The Commonwealth CRC program aims to turn research outcomes into successful new products, services and technologies. This enables Australian industries to be more efficient, productive and competitive.

The program emphasises collaboration between businesses and researchers to maximise the benefits of research through utilisation, commercialisation and technology transfer.

An education component focuses on producing graduates with skills relevant to industry needs.

STCRC’s objectives are to enhance:

- the contribution of long-term scientific and technological research and innovation to Australia’s sustainable economic and social development;
- the transfer of research outputs into outcomes of economic, environmental or social benefit to Australia;
- the value of graduate researchers to Australia;
- collaboration among researchers, between researchers and industry or other users; and efficiency in the use of intellectual and other research outcomes.