

New South Wales Food & Wine Tourism Strategy & Action Plan

2018 - 2022



FOREWORD

The NSW Food & Wine Tourism Strategy & Action Plan 2018 - 2022 is designed to provide the food and wine sector and the tourism industry with an overview of Destination NSW's plans to further support the development of food and wine tourism to the State.

NSW attracts more domestic and international visitors than any Australian State, giving us a position of strength to leverage in growing consumer interest and participation in food and wine tourism experiences.

The lifeblood of this vibrant industry sector is the passion and innovation of our producers, vignerons, chefs and restaurateurs and the influence of our multicultural population on ingredients, cooking styles and cuisine and beverage purveyors.

NSW is also home to the oldest and newest wine regions in Australia, world renowned for vintages of exceptional quality. From fifth-generation, family-owned wineries to a new generation of winemakers experimenting with alternative techniques and varieties, the State's wine industry is a key player in the tourism industry. Alongside our winemakers, a new breed of beverage makers – the brewers of craft beer and ciders and distillers of gin and other spirits – is enriching the visitor experience.

The aim of this Strategy & Action Plan is to ensure NSW's exceptional food and wine experiences become a highlight for visitors to the State.

Destination NSW is grateful to the many industry stakeholders who have contributed to the development of this Strategy and Action Plan, and we look forward to working together to deliver outstanding food and wine experiences to every visitor.

Sandra Chipchase

Chief Executive Officer
Destination NSW



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New South Wales
**Food & Wine
Tourism Strategy
& Action Plan**
2018 - 2022

MESSAGE FROM THE MINISTER

On behalf of the NSW Government, I am delighted to present the NSW Food & Wine Tourism Strategy & Action Plan 2018 – 2022, designed to grow NSW's position as Australia's most diverse food and wine State.

Home to 14 distinctive wine regions, NSW has a vast land mass and coastline bursting with fresh seafood and produce of all kinds. From award-winning wines, beers, spirits and ciders to cherry, walnut and avocado orchards, truffle farms, beef and lamb, freshwater trout and sumptuous seafood, our State is uniquely positioned to deliver an exceptional food and wine experience.

The NSW Government is committed to supporting and helping grow food and wine tourism businesses in the State. The goal is a vibrant and sustainable food and wine tourism industry that offers every visitor unique and memorable experiences during their stay.

The strategies developed to achieve these goals will increase the awareness and appeal of the State's food and beverage offering; ensure NSW takes a leadership role in the development of food and wine tourism by building industry capability and encouraging collaboration; develop compelling experiences that meet the needs of consumers and industry; support event development in order to further showcase NSW food and wine experiences; and deliver research and insights to inform the future development of food and wine experiences and marketing programs.

We look forward to working with industry and travel partners to deliver the NSW Food & Wine Tourism Strategy & Action Plan 2018 – 2022 and, in turn, contributing to the goals of tripling overnight visitor expenditure and reaching \$25 billion in regional visitor expenditure by 2030.



Adam Marshall MP
Minister for Tourism and Major Events



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INTRODUCTION



The enjoyment of eating and drinking local produce in unique venues and locations is an integral part of the travel experience. Nothing provides visitors with better insight into the local culture and customs than a destination's food and wine, which connects visitors to the people, the produce and the place.

Globally, people are becoming more knowledgeable and engaged with food and bespoke beverages. Visitors are increasingly looking for a destination's 'authentic' experiences and the opportunity to enjoy its fresh local produce. NSW, with its world-class food and wine offering, is well placed to capitalise on these trends.

The term 'food and wine' in this Strategy & Action Plan is used to describe a broad category of food, beverages and related experiences that have expanded rapidly over the last decade. It includes wineries, breweries, distilleries, farmers markets, fruit picking and other farm gate activities, native ingredient producers and 'bush tucker' experiences, artisan bakeries and patisseries, coffee roasters, chocolate makers, cheese factories, cooking schools, food and wine festivals and events, business events, weddings and many more.

The Strategy & Action Plan aims to increase the positioning of NSW as Australia's number one food and wine destination. To achieve this honour in the face of strong competition, the Plan invites and encourages collaboration and investment from all sectors of the food and wine industry and Government.

The Vision:

For Sydney and Regional New South Wales to be recognised amongst the world's leading food and wine destinations, offering Australia's best and most diverse food and wine tourism experiences.

ROLE OF DESTINATION NSW IN FOOD & WINE TOURISM

Food and wine tourism is one of the priorities of the NSW Visitor Economy Industry Action Plan and promoting NSW's food and wine offering is a key focus for Destination NSW^{1&2}. We showcase food and wine destinations and experiences in marketing and Public Relations programs worldwide; provide advice and support to food and wine tourism stakeholders; and offer a comprehensive program of travel industry and media familiarisation visits to highlight the diversity and quality of food and wine offerings throughout the State.

Destination NSW's current food and wine tourism strategies include:

- > Featuring food and wine content (film and photography) in destination and partnership marketing programs in Australia and 13 priority international markets designed to drive overnight visitation to the State
- > Content creation and the development of a comprehensive library of images and video of food and wine tourism experiences featuring different ethnic and demographic groups
- > Domestic and international media coverage and support for social media influencer visits
- > Leadership and support for the six regional Destination Networks to increase industry engagement and develop more food and wine tourism products and visitor experiences

- > Investments in food and wine tourism festivals, events and media vehicles that support the visitor economy and generate media coverage for the State
- > Capacity building initiatives to support the growth of the food and wine tourism industry
- > Advice to food and wine businesses who wish to diversify into tourism
- > Input into policy discussions on matters impacting food and wine tourism development.

Destination NSW also supports major food and wine partnership initiatives such as Tourism Australia's *Restaurant Australia*, NSW travel itineraries for participants in *The World's 50 Best Restaurant Awards* and major broadcast initiatives to showcase the State's food and wine tourism offering to international food and wine industry stakeholders and media outlets.

In addition, Destination NSW was a member of the NSW Wine Industry Working Group in the development of the NSW Wine Strategy 2028, led by the NSW Wine Industry Association and NSW Department of Premier and Cabinet.

The role of this Food & Wine Tourism Strategy & Action Plan is to accelerate Destination NSW's efforts to support the further development of the sector and to contribute to the Visitor Economy Industry Action Plan 2030's goal of tripling overnight visitor expenditure by 2030¹.



THE NEED FOR A STRATEGY & ACTION PLAN

The NSW Visitor Economy Industry Action Plan identified increasing visitor spend and dispersal as key strategies in meeting the NSW Government's goals. The report highlighted food and wine as a priority sector in which yield growth might be readily achieved².

The report also identified a significant, largely untapped opportunity to use NSW's diverse food, wine and dining offering to enhance the State's image and appeal. It recommended a number of actions to achieve these goals through marketing, product and event development, education and training, and industry collaboration.

NSW is blessed with natural food and wine tourism assets. Its 2,000 kms of coastline delivers seafood that is world class. The 14 distinctive wine regions produce quality, award-winning wines across the spectrum of varietals and the agricultural sector yields an abundance of produce.

In cities and towns around the State, commercial producers and artisans make products of the highest quality – from beer and baked goods to coffee, cordials, cheese and chocolates. This diversity of produce provides the ingredients for great food and wine and the inspiration for passionate winemakers, brewers, distillers, chefs, restaurateurs, cooks and café owners around the State.

For domestic visitors to Australia, Destination NSW's Brand Health Tracker reports that at present Australians associate NSW less as a food and wine destination in comparison to Victoria and South Australia³.

Association of food, wine and fresh produce with holidays or short break destinations in Australian states



Source: DNSW Brand Health Tracker – Travel Module, Year ended Dec 2017

Importance Factors



Source: Tourism Australia Consumer Demand Project 2017 – NSW State Report

For international visitors, ‘good food, wine, local cuisine and produce’ ranks fourth behind ‘safe and secure destination’, ‘world class beauty and natural environments’ and ‘value for money’ as a driver of destination choice⁴.

A previous visit to Australia appears to impact this ranking as there is a significant gap in the perception of Australia’s food and wine offering between those who have visited and those who have not. Only 21% of first-time international visitors associated Australia with good food and wine whereas 50% of repeat visitors ranked Australia highly on this attribute, behind France and Italy in third place⁵.

Developing and promoting the State’s quality food and beverage offering and addressing these perception gaps will be crucial to increasing domestic and international visitors and their length of stay in NSW.

The need for a Food & Wine Tourism Strategy & Action Plan is also driven by other factors. In recent years, the food and wine tourism sector has become increasingly competitive as destinations leverage the growing global interest in the provenance of quality food and wine.

The tourism industry worldwide has acknowledged the power of food and wine to influence holiday-making decisions and has started to focus its energies on developing and promoting the sector in a co-ordinated fashion. In this competitive environment, a strategy is needed to guide the growth of the NSW food and wine tourism sector and position the State as a leading food and wine destination.

The NSW Food & Wine Strategy & Action Plan 2018-2022 provides a framework to continue to address these challenges.



THE NSW FOOD AND WINE SECTOR

The diversity of NSW's geography and growing conditions means that many regions have a strong local food and wine identity derived from what is grown, harvested and locally produced. The wine industry alone identifies 14 unique wine regions within the State, each with their own signature styles. Similarly, while not formally mapped, many regions are known for high-quality food products that thrive in the local environment. For many regions, these products form part of their unique tourism appeal.

For Sydney and the State's six Destination Networks, these unique food and wine offerings are an opportunity to tell compelling local stories and develop new experiences that highlight each region's differences and strengths.

Although restaurants, bars and cafés remain the primary interface between visitors and the food and wine sector, visitors are now looking for more immersive and educational experiences at a destination. Engagement with growers, sampling fresh produce, "hands-on" and educational activities that give greater insights

into the produce and region are important drivers for today's travellers.

The power of food and wine to influence visitors has encouraged many operators to focus on targeting the visitor market through product development and promotion. However for many businesses in this category, tourism is not the core activity with their primary focus being production, distribution and catering for regular local customers. Therefore, these operators may need support and guidance to develop their ideas and participate successfully in the visitor economy.

A key part of this Strategy & Action Plan is to encourage the food and wine tourism sector to develop, promote and sell unique products that will help define a region's food and wine identity and drive overnight visitation. These attributes can be integrated into marketing and promotional activities to enhance storytelling and build destination appeal. An insight into the unique food and wine identities of each Destination Network region is provided on the following pages.





SYDNEY

Sydney is an exciting destination with a multicultural food scene that is one of the most innovative and talked about of any city in the world. Visitors can dine by Sydney Harbour in award-winning restaurants with spectacular water views, enjoy casual dining in historic pubs steeped in colonial history, savour breads and pastries of all types and shapes, or take a food-lovers walking tour through one of the many suburbs – like Marrickville, Lakemba or Cabramatta – whose multicultural communities have uniquely shaped their dining and food-retail offerings. Visitors to Sydney are spoilt for choice with dining options in every corner of the city and mouth-watering menus featuring the freshest local produce.

Farmers Markets supplying fresh, often organic, and artisanal products from across New South Wales are thriving throughout Sydney, providing opportunities to speak directly to the grower. Boutique breweries, often attached to historic pubs, are flourishing, with many venues specialising in small-batch craft beers, and distilleries and urban wineries have also emerged offering cellar door experiences just a stone's throw from the CBD. Add to this the artisan bakers, patisseries, coffee roasters, butchers and food specialty shops and it is clear that Sydney is a tantalising food and wine destination for any visitor.



DESTINATION NORTH COAST

The North Coast region covers the coastal fringe from Hawks Nest in the south to Tweed Heads in the north. Its vibrant food and wine culture is constantly evolving and is deeply imbued with the casual, outdoor lifestyle of its many coastal and hinterland communities. The main centres of Byron Bay, Ballina, Coffs Harbour, Port Macquarie, Taree, Wingham and Forster-Tuncurry have well-developed restaurant and cafe scenes with menus created from local produce and seafood.

The Tweed Valley and Northern Rivers regions are often defined by their relaxed lifestyle. The rich volcanic soils and humid sub-tropical climate deliver a bounty of fruit and vegetables including many, like coffee and macadamia nuts, not grown elsewhere in NSW. Inland, lush pastures support beef and dairy cattle while the fishing industries of the coastal towns deliver fresh seafood, particularly prawns, snapper, yellowtail kingfish and blue-eye.

Further south, the Coffs Coast is famous for its production of bananas, berries and oysters, while its history of Punjabi immigration has infused the flavours of the sub-continent into key events such as Curryfest and the Sawtell Chilli Festival.

The small but developing Hastings River wine region, one of the State's earliest wine growing areas near Port Macquarie, is best known for its varietal, Verdelho, but Chambourcin, Chardonnay and Semillon also thrive in growing conditions that can often be challenging.

A growing number of artisan distillers and breweries have made their home in the North Coast region producing outstanding craft beers and high quality gins and rums scented with locally sourced aromatics and botanicals.



DESTINATION SYDNEY SURROUNDS NORTH

The Sydney Surrounds North region stretches from the Blue Mountains and Hawkesbury regions in the west to the Central Coast, Newcastle, Port Stephens and Lake Macquarie in the east and includes New South Wales' most visited wine region – the Hunter Valley. A mix of coastal, agricultural and mountain landscapes, the region enjoys a high level of visitor awareness of its quality food and wine offering – from exquisite fine dining and outstanding seafood, to relaxed pub lunches and mountain farmgates. Its close proximity to Sydney, the major gateway to the State for international and many domestic visitors, also makes it easily accessible for day trips or longer stays and adds to its visitor appeal.

The UNESCO World Heritage Blue Mountains is richly endowed with local produce, award-winning chefs and a variety of food-based pleasures. Home to some of the State's finest chocolate makers, it has a buzzing café scene complemented by spectacular landscapes. It is also one of only two regions in the Southern Hemisphere recognised by the Slow Food movement as having 'Cittaslow' status, whose principles include a strong hospitality, conviviality and food component.

The Hawkesbury region in Sydney's north west has been growing food for the city since the early years of Western settlement. Farming continues today

with the region most famous for its orchards. Fresh walnuts and fruit, particularly apples and citrus, are available at road-side stalls and markets and local artisan producers also specialise in honey, preserves and ciders.

The Hunter Valley is one of Australia's oldest wine regions and home to some of the country's most distinctive and outstanding wine styles, including the world-renowned Hunter Valley Semillon. The region is also known for producing high-quality Shiraz, Cabernet Sauvignon, Verdelho and Chardonnay as well as for its organic and gourmet olive oils, beef and poultry, stone fruit and exceptional dairy produce that includes hard-rind and soft cheeses. The region has more cellar doors than any other region in Australia and boasts a broad range of accommodation options, festivals, fine dining restaurants, luxury resorts and golf courses to appeal to visitors.

On the doorstep of Sydney, the Central Coast is a popular weekend getaway for city dwellers, attracted by its coastline, lakes and vibrant café culture. Its hinterland villages boast dozens of small farms producing beef, vegetables and citrus fruits which are celebrated in the annual Harvest Festival.

Further north, Port Stephens has a reputation for its quality seafood, offering a variety that is unique to the region and the envy of others, from ocean fish and prawns, to lobsters, oysters and both Blue Swimmer and Mud Crabs.

DESTINATION SYDNEY SURROUNDS SOUTH

Stretching from the Sydney fringe and Southern Highlands to the coast at Wollongong and south to the Shoalhaven, Sydney Surrounds South includes two of New South Wales' 14 wine regions.

The picturesque and wildly beautiful Southern Highlands plateau, with its distinct seasons, is populated by large estates, artisan farms, more than 60 vineyards and historic villages that are home to lively and friendly communities. Its elevation lends itself to cool climate wines with Pinot Noir and Pinot Gris acknowledged as the region's flagship wine varieties. While cattle and dairy have been the traditional agricultural focus, artisan farmers have more recently introduced regional specialities such as yabbies, olives, truffles, Wessex Saddleback pigs, heritage produce varieties, brassicas and botanicals. The region is also becoming known for organic milk, traditional cakes and sourdough breads, sausages, smoked meats and sheep's milk cheeses. This movement towards the artisan producer has also been reflected in an increasing number of restaurants and cafés specialising in the use of locally grown produce.

In recent years, Wollongong has undergone a revolution in its café culture that is now unique to the area with many younger operators opening fashionable venues with a focus on fresh produce. Nearby, boutique breweries produce high-quality beers and ciders, and towns and villages along the coast and in the hinterland are becoming known for food offerings of a high standard.

Further south, the Shoalhaven River is a major centre for commercial fishing and is the start of the South Coast Oyster Trail. The Sydney Rock Oyster, a local speciality, is prized for its intense and tangy flavour and much sought after in restaurants around the country.

Relatively young in viticultural terms, the Shoalhaven region boasts 16 small but productive vineyards producing a range of white and red wine. While Chambourcin, a red hybrid varietal with vibrant colour and fresh, plummy fruit aromas, is considered the region's signature wine, many wineries have recently begun exploring new varietals such as Tannat, Arneis and Sangiovese.

The wineries in this region offer diverse cellar door experiences set in spectacular coastal scenery. The lush, green country of the hinterland has also attracted an innovative group of farmers who are growing a huge variety of produce and working with local chefs and winemakers to encourage the concept of the 'locavore', one whose diet primarily consists of locally grown or produced food.



DESTINATION SOUTHERN NSW

Southern NSW is a diverse region spreading south from the Upper Lachlan and Hilltops districts to the Victorian border, and east from Canberra to the Eurobodalla and Sapphire Coasts. This large region includes pristine coastal areas, prime grazing land, mountain high country and the rich soils of the South West Slopes. Notwithstanding its border with the national capital on its western edge, the region comprises mainly smaller regional towns and villages set in large areas of farmland and includes two of NSW's wine regions.

Hilltops, centred around Young, is a small but emerging wine region that is producing some exceptional wines in the premium end of the market. At an elevation above 450m, the region specialises in cool-climate reds, with Cabernet Sauvignon being its hero variety. Blessed with rich and free-draining *terra rossa* soil, wines from this region have a rich intensity and are known to age well. The soil, together with a climate that delivers a long growing season, is also responsible for the area's focus on the production of stone fruit, particularly cherries, which are celebrated each year at Young's National Cherry Festival.

The region is known for its wheat and lamb, while poultry, farmed rabbit and premium grass-fed beef are also specialities.

Despite its name, the majority of the 140 vineyards in the Canberra District wine region are located in New South Wales, primarily around the towns of Murrumbateman, Yass, Bungendore and Lake George. Though vines have been grown in the area since the 19th century, it is only in the last decade that the industry has seen rapid expansion with the establishment of many small-scale vineyards developed by skilled and dedicated vignerons prepared to experiment with the local microclimates. Wines from this region are now regularly winning awards with Shiraz and Riesling best known as its flagship varieties.

In a region traditionally known for grazing, the emergence of a thriving wine industry has also encouraged the development of a wide range of local food enterprises in the historic and charming villages throughout the region. Local specialities

include poultry, apples, nashi pears, nectarines, hazelnuts, berries, olives, truffles and exotic mushrooms in addition to smoked meats, specialty dairy products such as blue-vein cheeses, handmade chocolates and a range of chutneys, sauces and preserves made from local fruit.

Further south, the Snowy Mountains region supports the largest number of Angus cattle in Australia. Groups of artisan producers are also emerging and several producers can lay claim to some unique high-altitude records for their products. Many, including dairy producers, distilleries, breweries and trout farmers are leveraging the region's pristine environment to highlight the natural quality of their products.

To the east, the coastal areas of Bega and Eurobodalla are famed for their oysters, seafood and dairy farming. South from Batemans Bay to the Victorian border at Eden, there are farm gates, restaurants and cafés that celebrate the region's oysters and other seafood, while specialist cheese factories offer visitors insights into one of the region's key industries together with sampling and sales of cheese and, increasingly, ice cream.



DESTINATION RIVERINA MURRAY

The Riverina Murray region is one of the most diverse destinations in NSW, spreading from the Snowy Valleys in the east to West Wyalong in the north and following the Murray River to Wentworth at the State's western border. The region is one of Australia's major agricultural areas thanks to rich soils, irrigation programs and innovative farming practices.

Today, the Riverina alone produces around a quarter of NSW's total fruit and vegetable crops, the major part of its citrus products and is the home of rice-growing in Australia. On its eastern side, the region is known for high-quality beef and lamb, while Batlow, nestled in the western valleys of the Snowy Mountains, has become synonymous with apple growing and cider-making.

This substantial region hosts four of the State's 14 wine regions, all with their own unique characteristics. The Riverina wine region, centred around Griffith and Leeton, is the largest wine-producing region in New South Wales, accounting for 60% of the State's production of varietal grapes and a significant portion of Australia's wine exports. With many of the Riverina's wineries still owned by the families of the European migrants who first planted them after the Second World War, the region has a distinctive cultural identity not replicated elsewhere in Australia.

Though producing a wide range of wine styles, including excellent Shiraz and many alternative varietals, the hero wine is the Botrytis Semillon, which, though made in small scale production, has brought the region national and worldwide recognition. Today the region boasts more than a dozen different Botrytis Semillon dessert wines, each unique to their winery. The Southern European heritage in the region has also influenced its restaurants and artisan producers who specialise in Italian-influenced menus and produce. Salamis, nougat, sun-dried tomatoes, pesto, olives and olive oils are all boutique products from the region that add to its diversity.

East of the Riverina wine region, Gundagai is one of NSW's newer wine-producing areas. Though originally established in the 19th century by German immigrants, viticulture died off in the early 20th century until being re-established in the mid-1990s and receiving Australian Geographical Indication status in 2002. Although still in early development, the region is already becoming known for its Shiraz and Chardonnay wines, but its altitude and variations in climate and soil conditions offer the potential to excel with a wide range of grape varieties and wine styles.

Tumbarumba, on the western slopes of the Great Dividing Range, produces wines of great refinement and complexity thanks to a soil comprising decomposed granite, basalt and shale loams.





The coolest of the State's wine growing regions, Tumbarumba is best suited to Chardonnay and Pinot Noir grapes, the majority of which are used by major wine producers for their sparkling wines. Recently, however, local vignerons have started to use their fruit to launch their own labels and are producing sparkling and still wines of some note.

NSW's smallest wine region, Perricoota, is located along the northern banks of the Murray River around Moama. Awarded Australian Geographical Indication appellation in 1999, the grapes from this developing region are primarily sold to bulk producers elsewhere. Best known for its Shiraz, a small percentage of the annual harvest is starting to be made into Perricoota-branded wines.

With its wealth of agricultural produce, it is not surprising that the Riverina Murray region has a thriving food scene. Major centres such as Wagga Wagga, Griffith and Albury have an increasing number of high quality dining experiences but outstanding restaurants can also be found in many of the smaller towns. The region also offers many country-style cafés, bakeries, food and wine festivals and food trails that highlight the region's best produce and a number of innovative producers have turned their boutique cheese, whisky, chocolate and licorice operations into major tourist attractions. Agritourism, including farm stays and activity-based experiences, is also increasing in popularity.

DESTINATION COUNTRY & OUTBACK NSW

The largest of the Destination Networks, Country & Outback NSW, spreads west of the Blue Mountains, Hunter Valley and Great Dividing Range in the north to the State's western border. Whilst a significant agricultural region, there are marked variations in production between the western and eastern sections. The western region focuses primarily on large-scale cattle, wool, cereal and broadacre crop farming, while the eastern sector has a more diversified agricultural profile and includes four of the State's recognised wine regions.

In the far north east of the Country & Outback region, New England is one of the richest agricultural production areas in the State,

accounting for 20% of the gross value of NSW's agriculture and agribusiness. While the focus has been on sheep and cattle grazing, broadacre cereal crops, poultry production and intensive livestock and plant agriculture, the last few years have seen a rise in the production of more niche food products such as gourmet cheese, premium lamb, rangeland goat, truss tomatoes, herbs and organic garlic.

New England can lay claim to being the State's newest wine region. Despite viticulture in the region existing since the 1850s, it was only officially registered in 2008. A region unlike any other in NSW due to a topographical diversity that sees both high altitude, cool climate vineyards on the spine of the Great Dividing Range, and lower, warmer climate vineyards on the western edge of the tablelands, New England produces some very elegant Riesling, Chardonnay, Sauvignon Blanc and Shiraz. Experimental plantings of alternate varieties such as Tempranillo, Barbera and Tannat have also recently been paying dividends.

Further south, the Mudgee region is an area of outstanding natural beauty and rich history. Its gold rush heritage, rolling hills and welcoming community give it an irresistible rustic appeal that has attracted visitors for generations. Its location in the valley of the Cudgegong River makes it a productive agricultural region and while its pastoralist





history is associated with prime sheep and cattle production, farming and horticulture, this has recently diversified to include saltbush lamb, Wagyu beef and rare poultry breeds. Mudgee's providores, regular farmers markets and farm walk tours feature an exceptionally broad range of seasonal produce and locally-made artisan fare with regional specialities that include hazelnuts, verjuice, saffron, cheeses, locally made chocolate, olives and olive oil and the area's much acclaimed honey.

Vines were first planted in the mid-19th century and today Mudgee is the third largest grape-producing region in NSW and boasts more than 40 cellar doors. With a strong historical association with excellent Chardonnay, the region is perhaps better known for its full-flavoured Shiraz and Cabernet Sauvignon which consistently draw acclaim. More recently, Mudgee has also become a leader in organic viticulture.

Despite only 30 years of modern grape growing, the Orange region has successfully positioned itself as one of Australia's premium food and wine destinations. With its elevation above 600m and associated climate and variety of volcanic soil types, the Orange region supports an extremely diverse farming and horticultural industry that includes fruit orchards, meat production and trufferies as

well as viticulture. The incredible range and quality of its produce has attracted major chefs, food producers and providores to the region and its annual food and wine festivals have become so popular that Orange is now associated primarily with the outstanding quality of its food and wine.

The 80 mainly family-owned vineyards in Orange produce an astonishing variety of wine styles thanks to the variations in climate, altitude and soil. While Chardonnay and Shiraz are noted as hero wine varieties, winemakers are also producing some excellent Sauvignon Blanc, Riesling, Merlot and Cabernet Sauvignon and are also experimenting with blends of grapes from different elevations and soil types including Cabernet Franc and Cabernet Merlot.

On the south eastern border of Country & Outback NSW, and adjacent to Orange, the Cowra region produces premium wine grapes, with harvests from the many big wine company estate vineyards much sought after to add flavour and body to the blends of winemakers from other regions. Smaller, boutique wineries are creating wines with unique characteristics, with Chardonnay and Shiraz the hero varieties, the warm days, cool nights and dry late Summers creating perfect conditions for ripening the grapes.

A PROFILE OF FOOD AND WINE TRAVELLERS

NSW is the number one State in Australia in terms of domestic and international overnight visitors, visitor nights and visitor expenditure. In the year ending December 2017, NSW received 35.7 million overnight visitors who stayed 194.5 million nights and spent an estimated \$29.1 billion in the State^{6 & 7}.

Domestic and international overnight visitors contribute significantly to food and wine expenditure in NSW. Tourism Research Australia estimates that food and wine expenditure accounts for one in five dollars spent by international overnight visitors and one in twenty dollars spent by domestic overnight visitors.

The International Visitor Survey (IVS) and National Visitor Survey (NVS) provide insights into domestic and international overnight visitors who have been to a winery during their trip (Wine Travellers). In 2017, new survey questions were added that now offer similar data on Food Travellers – those overnight visitors who have had a food experience during their trip. “Food experiences” include visiting a local food market or food festival, taking a farm or food tour, participating in fruit picking or a cooking class, or eating at a fine dining restaurant.

In the year ending December 2017, there were 1.5 million international and domestic overnight Wine Travellers to NSW. They stayed for 14.4 million nights and spent \$2.1 billion in the State.



WINE TRAVELLERS	VISITORS (million)	VISITOR NIGHTS (million)	EXPENDITURE (billion)
Domestic Overnight	1.3	4.2	\$1.0
International	0.2	10.1	\$1.1

Source: Tourism Research Australia, International and National Visitor Surveys, YE December 2017

In the same period, NSW received 5.0 million international and domestic overnight Food Travellers who stayed for 59.4 million nights and spent an estimated \$8.5 billion in the State.

FOOD TRAVELLERS	VISITORS (million)	VISITOR NIGHTS (million)	EXPENDITURE (billion)
Domestic Overnight	3.5	13.6	\$3.1
International	1.4	45.8	\$5.4

Source: Tourism Research Australia, International and National Visitor Surveys, YE December 2017

Food Travellers and Wine Travellers are valuable contributors to the visitor economy with both segments spending more per person than the average visitor to NSW. The average domestic overnight visitor spends \$590 per individual while the average domestic overnight Wine Traveller spends \$834 and the average overnight Food Traveller spends \$882.

Similarly, the average international overnight visitor spends \$2,449 per individual while the average international overnight Wine Traveller spends \$4,763 and the average international overnight Food Traveller \$3,784 per individual.



Research conducted by the World Food Travel Association confirms this trend, finding that ‘Culinary Travellers’ – those who have participated in a unique or memorable food or drink experience on a recent trip and for whom food and drink experiences are a prime motivator in choosing a destination – are more likely to spend more on food and drink, take part in a greater variety of experiences, and take more trips than average travellers⁸.

Domestic Food & Wine Travellers

Domestic visitors are the largest source market for the food and wine tourism sector. In the year ended December 2017, NSW’s wineries and food experiences attracted over 1.3 million domestic overnight Wine Travellers and 3.5 million domestic overnight Food Travellers who spent \$1.0 billion and \$3.1 billion respectively⁷.

Domestic Wine Travellers stayed a total of 4.2 million nights with an average length of stay of 3.3 nights. Similarly, the Australian domestic Food Travellers stayed 13.6 million nights with an average length of stay of 3.8 nights.

For domestic overnight Wine Travellers, Sydney is the largest source market (55.8%) to regional NSW with 18.0% travelling from interstate. Interstate Wine Travellers to NSW account for 29.5% of visitor nights and stay an average of 5.4 nights. By comparison, Wine Travellers from Sydney to Regional NSW account for 44.5% of

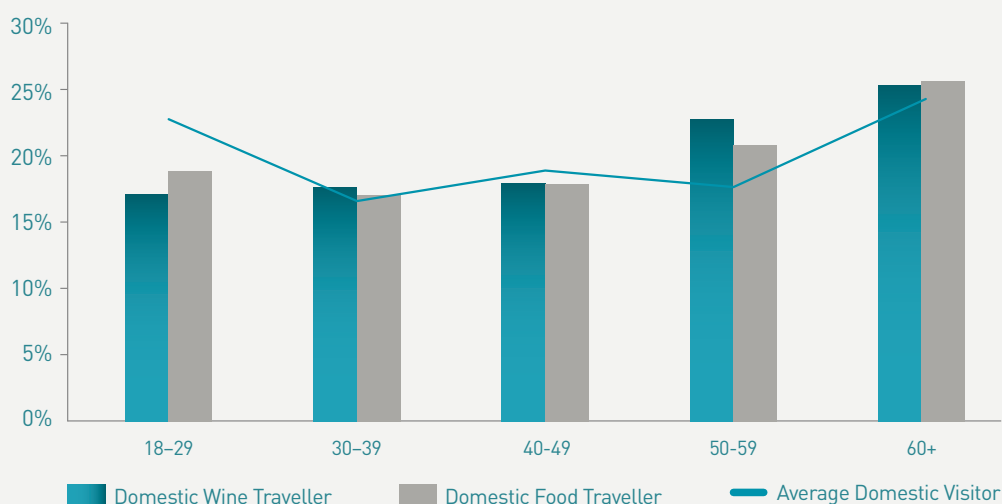
visitor nights and stay an average of 2.6 nights suggesting that, with its close proximity to wine regions, Sydney-based Wine Travellers are a good target for short breaks into Regional NSW.

Source markets for domestic overnight Food Travellers are more evenly spread with interstate and Regional NSW the largest (37.8% and 31.4% respectively), compared to 30.7% from Sydney. Interstate Food Travellers account for almost half of all food visitor nights (46%), while Sydney and Regional NSW account for 27.1% and 26.9% respectively. The average length of stay for interstate, Sydney and Regional NSW Food Travellers is 4.7, 3.4 and 3.3 nights respectively.

The 60+ years of age group is the largest for domestic overnight Wine Travellers (25.3%) followed by the 50-59 years group (22.6%) and 40-49 years group (17.9%). Food Travellers show a similar pattern with the 60+ and 50-59 years groups having the largest share (25.5% and 20.7% respectively). However, the younger 18-29 year group is the third largest for Food Travellers, at 18.9%.

While there is broad correlation with the age of the average visitor to NSW, the share of both Food Travellers and Wine Travellers in the 50-59 and over-60s age groups is slightly higher while the 18-29 age group is markedly lower, suggesting higher levels of interest in food and wine tourism among older travellers.

Domestic Overnight Visitor Age Profile



Source: Tourism Research Australia, National Visitor Survey, YE December 2017

Fine dining and visiting local food markets are the two leading food experiences enjoyed by domestic overnight Food Travellers (60.2% and 35.8% respectively), though there are marked differences between Food Travellers who visited Sydney and those who visited a regional destination. For domestic overnight Food Travellers to Sydney, fine dining is experienced by 70.7% of visitors, followed by local food markets (26.5%) and food festivals (6.9%). For domestic overnight Food Travellers to Regional NSW, fine dining still ranks first (54.5%) but is closely followed by local food markets (40.9%). Their other food experiences include food festivals (6.9%), farm tours (4.2%) and fruit picking (3.7%).

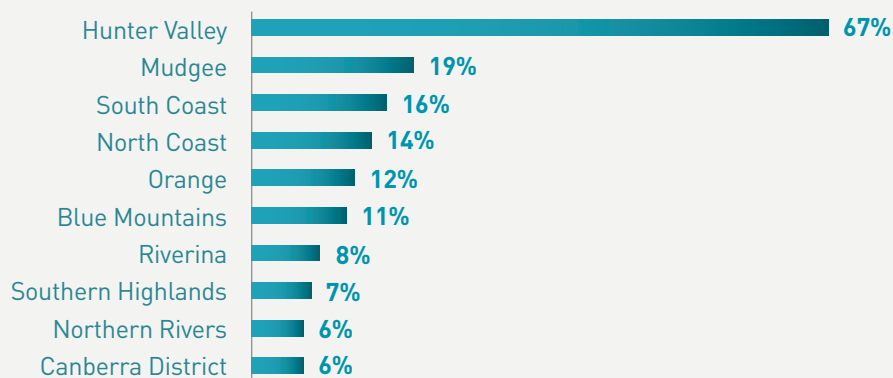
In terms of wine regions, the Hunter Valley and Mudgee were the most visited by domestic overnight Wine Travellers - 47.1% visited the Hunter Valley and 10.0% visited Mudgee. Orange, the Southern Highlands and Shoalhaven are also popular wine regions. However, one in five wine visitors surveyed in the National Visitor Survey (NVS) could not specify any of the wine regions they visited, which may indicate generally low levels of awareness of the State's different wine regions and brands.

Research commissioned by Destination NSW and Tourism Research Australia in 2014 provides further insights into specific food & wine regions and the perceptions, motivations and behaviours of domestic food and wine visitors from NSW, Canberra, Brisbane and Melbourne⁹.

In this research, the Hunter Valley was the most popular destination (39%), followed by the Blue Mountains (20%), Mudgee (13%), the Southern Highlands (13%) and the Canberra Region (12%). Not surprisingly, most NSW residents favoured destinations close to their point of origin, while for respondents from Brisbane and Melbourne, the regions closest to the transport hub of Sydney were most popular.

Nonetheless, general awareness of different regions as food and wine destinations was relatively low, with the exception of the Hunter Valley, suggesting that, even among NSW residents, work is required to build the awareness and appeal of the different food and wine destinations throughout the State.

Awareness of Top 10 NSW Food & Wine Destinations



Source: Tourism Research Australia, Food & Wine Tourism in New South Wales, January 2015

A further interesting insight from this research was that, in addition to eating and buying local produce, talking to growers and learning something new, respondents indicated that the journey to the destination and visiting other places of interest nearby were also important elements of a good food and wine experience.

This points to the importance of integrating food and wine content into the broader destination story and the value of collaboration across regions in the development of destination marketing programs.

Domestic day trip visitors are also an important consideration for the food and wine tourism sector. For example, the NVS reports that 454,000 domestic day trip visitors visited a winery⁷. These visitors contributed \$81 million to the visitor economy, or \$178 per visitor. Whilst overnight visitors remain the focus of this Strategy & Action Plan, its initiatives also have relevance to the day trip market.

International Food and Wine Travellers

International Food and Wine Travellers, although a small percentage of total visitors, have a significant impact on the NSW economy.

In year ended December 2017, NSW received 238,700 international Wine Travellers who spent approximately \$1.1 billion and stayed a total of 10.1 million nights during their trip⁶. International Wine Travellers who travelled to NSW for the purpose of leisure stayed longer than all International leisure visitors to NSW, by an average of 10.4 nights.

International Wine Travellers represent only 16% of all overnight Wine Travellers to NSW but contribute 53% of wine traveller expenditure and 71% of wine traveller nights.

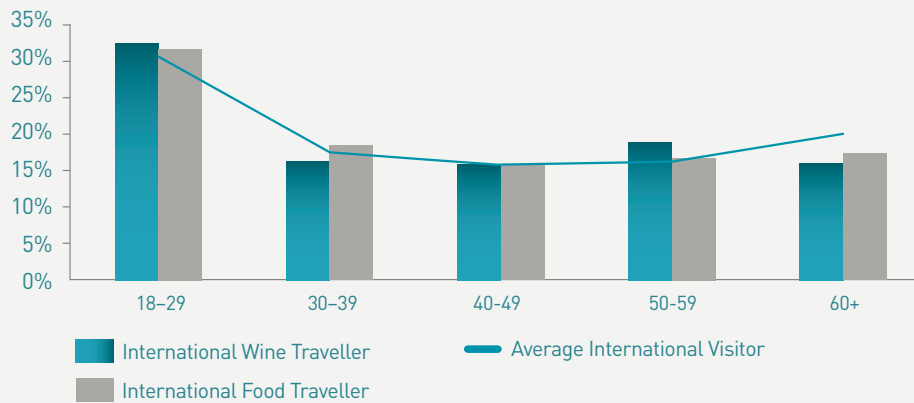
Similarly, NSW's 1.4 million international Food Travellers spent \$5.4 billion and stayed 45.8 million nights. International Food Travellers who travelled to NSW for the purpose of leisure stayed longer than all International leisure visitors to NSW, by an average of 4.5 nights.

Accounting for 29% of all overnight Food Travellers to NSW, international Food Travellers contribute 64% of food traveller expenditure and 77% of food traveller nights.

While international visitors generally stay longer than domestic visitors, the age profile of the international Wine Travellers and Food Travellers offers some interesting insights. Unlike their domestic counterparts, the largest group of both international Wine Travellers and Food Travellers by age is the 18-29 year group (32.5% and 31.7% respectively), suggesting that the influence of working holiday makers and international students, with their extended stays, is significant for the food and wine sector.

In general, the data suggests that international Food Travellers tend to skew younger than the average, while international Wine Travellers tend to skew older providing insights for the development of marketing activities within the sector.

International Overnight Visitor Age Profile



Source: Tourism Research Australia, International Visitor Survey, YE December 2017

Among international Wine Travellers, South Korea is the largest source market for NSW by numbers (19.3%), followed by China (15.0%) and the United Kingdom (12.4%). This order is reversed in terms of nights, with China contributing 24.4% of all international nights spent in NSW by Wine

Travellers, followed by the United Kingdom (12.9%) and South Korea (10.0%). This data confirms the growing importance of the Eastern markets of South Korea and China to the wine tourism sector in NSW.

RANK	ORIGIN MARKET	VISITORS		NIGHTS	
		('000)	%	('000)	%
1	South Korea	46	19.3%	1,013	10.0%
2	China	36	15.0%	2,474	24.4%
3	United Kingdom	30	12.4%	1,304	12.9%
4	United States of America	27	11.4%	719	7.1%
5	Canada	9	3.9%	344	3.4%
	Other Asia	49	20.4%	2,417	23.8%
	Other Europe	30	12.5%	1,428	14.1%
	Other Countries	12	5.2%	441	4.3%

Source: Tourism Research Australia, International Visitor Survey, YE December 2017

China is the largest source market for international Food Travellers to NSW (20.5%), followed by the USA (11.9%) and New Zealand (9.3%). In terms of nights, Chinese Food Travellers contribute 21.7% of all international nights spent in NSW by Food

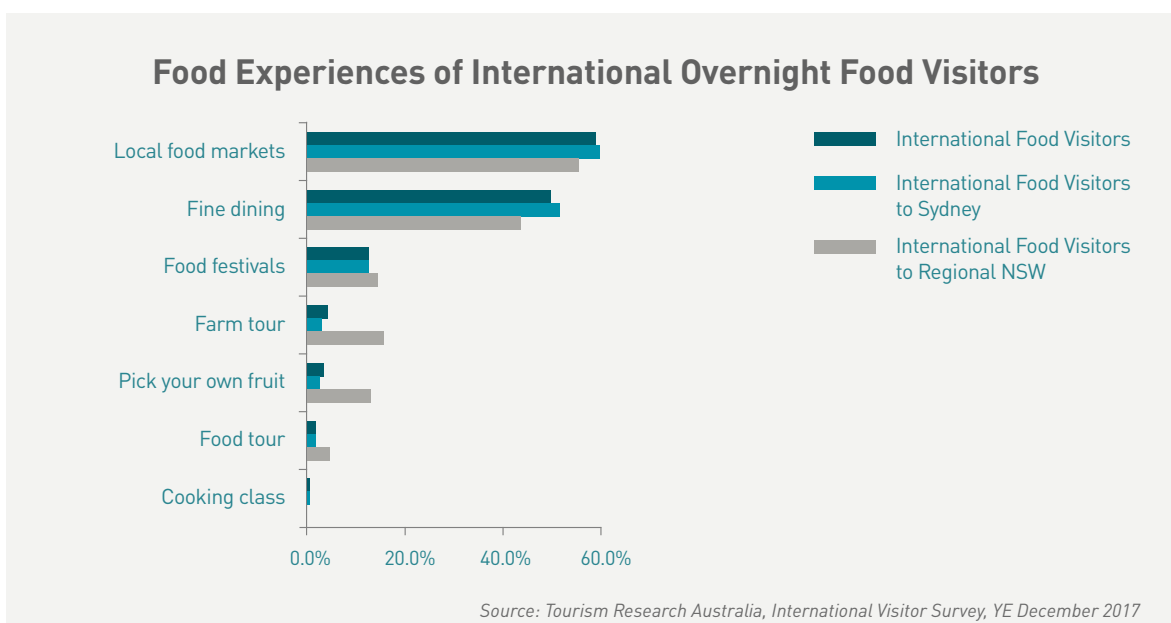
Travellers, followed by the United Kingdom (7.9%) and the USA (5.6%). Food experiences therefore remain a potent driver for visitors from China and the traditional Western markets.

RANK	ORIGIN MARKET	Visitors		Nights	
		('000)	%	('000)	%
1	Mainland China	296	20.5%	9,955	21.7%
2	United States of America	173	11.9%	2,558	5.6%
3	New Zealand	135	9.3%	1,291	2.8%
4	United Kingdom	121	8.4%	3,614	7.9%
5	Hong Kong	64	4.4%	1,528	3.3%
	Other Asia	365	25.3%	14,975	32.7%
	Other Europe	171	11.9%	6,214	13.6%
	Other Countries	120	8.3%	5,673	12.4%

Source: Tourism Research Australia, International Visitor Survey, YE December 2017

Visiting local food markets was the most popular experience for international Food Travellers (58.8%), followed by fine dining (49.7%), attending a food festival (12.8%) and farm tours (4.4%).

These are the top four experiences in Sydney and Regional NSW. Another popular activity for International Food Visitors to Regional NSW is fruit picking.



For International Wine Visitors, the most popular wine region visited is the Hunter Valley, with almost two-thirds (65.7%) of respondents visiting a winery in the region. As with their domestic counterparts, a significant portion (17%) of international Wine Travellers were unable to specify which wine

region they visited during their trip, reinforcing the need to differentiate the regional identities of the NSW 14 wine regions. The NSW Wine Country Book published by Destination NSW, which describes these 14 wine regions, is the first step in building the profile of each area¹⁰.

STAKEHOLDER CONSULTATION

Destination NSW consulted widely with food and wine stakeholders throughout NSW in the development of this Food and Wine Strategy & Action Plan.

An initial online survey, sent to more than 2,200 stakeholders engaged in, or with an interest in food and wine tourism in NSW, sought their views on the current state of the sector, opportunities and gaps, and the real and perceived limitations on sector growth.

This was followed by a series of roundtables with industry and government stakeholders in Gerringong, Queanbeyan, Wagga Wagga, Bathurst, Byron Bay, Pokolbin, Kempsey, Sydney and Narooma, at which the results of the online survey and the key pillars of the Strategy were presented to seek feedback from participants.

More than 430 stakeholders across the spectrum of the food and wine sector, including the Destination Networks, Local Government, industry associations, wineries, breweries, distilleries, restaurants, cafés, producers, tourist attractions and specialist tour operators took part in the consultation.

Destination NSW would like to acknowledge the valuable contribution of stakeholders in the consultation process and will continue to liaise with them throughout the delivery of the Strategy & Action Plan.



LEARNINGS FROM STAKEHOLDERS



The insights from stakeholders throughout the consultation process have highlighted the complexity of developing a strategy that meets the needs of the State's large and diverse food and wine tourism sector.

A key learning is that a one-size-fits-all approach will not meet the needs of a NSW food and wine tourism sector that is at different stages of development across the State. Flexibility is needed to ensure that operators can access guidance and support relevant to their own circumstances and market readiness.

Stakeholders identified six priorities throughout the consultation process.

1. Collaboration and Leadership

Collaboration within and between regions was identified as one of the most important priorities – particularly as a way to leverage industry expertise, Government funding and other resources. It will be critical to enabling stakeholders in the food and

wine sector to realise their ambitions in the tourism space. Stakeholders are looking to Destination NSW and the Destination Networks to play a leadership role in encouraging sector collaboration and to be a voice for the industry within Government. They also highlighted the importance of industry development programs for market- and export-readiness and other areas such as digital marketing. There was universal support for the development and implementation of this Strategy & Action Plan.

2. Marketing

The desire for a State-based food and wine brand was a common theme, with participants citing South Australia, Tasmania and New Zealand as leaders in this area. At the same time, stakeholders noted the challenge of developing an 'umbrella' food and wine proposition for NSW with its regional variation and diverse food and wine offering. Stakeholders also expressed support for identifying local food and wine heroes, authentic storytelling, the profiling of award-winning product, and the showcasing of food and wine trails to enhance a destination's appeal. There was a common desire for the development of fresh content in the form of quality images and video to help showcase their food and wine offering.



3. Events & Festivals

Events were seen as strong drivers of food and wine visitation to the regions and there was universal support for more and better quality food and wine events across the State. Key to an event's success was its strong links to the unique produce and local personalities of the area. Stakeholders noted that many regional events were volunteer-driven and that there was a need for local government support and capability building across all stages of event development to ensure long term sustainability.

4. Product Development

Ongoing support and guidance for the development of new food and wine tourism sector experiences was identified as an ongoing need, particularly among operators, such as producers, for whom tourism is not core business. Food and wine trails and agritourism initiatives such as farm tours and immersive food and wine experiences were identified as key opportunities to grow visitor appeal. Limitations in the development of new products and experiences, such as legislative 'red-tape' at the local government level, technology blackspots and limited transport options were also raised, with stakeholders looking to Destination NSW to advocate on their behalf for change in these areas.

5. Industry Development

Stakeholders expressed a desire for more capability building in the form of industry education and go-to-market support. In addition to business planning and product development, upskilling in the areas of digital marketing, event development, grant funding applications and customer service training, particularly in hospitality, were nominated as priority areas to ensure the industry has access to highly capable staff who deliver a quality and consistent service to visitors. Regional mentors, best practice sharing, toolkits, sector conferences and workshops were suggested as ways to facilitate this. Hospitality/service industry education about the breadth of the State's fresh produce and beverage offering was also requested with industry associations specifically called on to advocate on behalf of producers in the State.

6. Research and Insights

Access to more robust food and wine visitation data at the regional level was a shared concern at all the roundtables, as was easier access to consumer insights to better inform business planning and marketing programs. Guidance on best practice approaches to measure the economic impact of regional food and wine events was also a priority.



COLLABORATION

The NSW Food and Wine Strategy & Action Plan will be delivered through partnerships with the food and wine tourism sector over a four-year period, 2018-2022. Destination NSW's role will be to provide leadership in the areas of product and industry development, event development, marketing, public relations and research.

Collaboration will be key to achieving Strategy objectives and Destination NSW is committed to working with food and wine industry stakeholders, Federal, State and Local Government, industry associations, the Destination Networks, and local tourism agencies in this regard. Partnership agreements with the NSW Wine Industry Association and Restaurant & Catering Australia will provide a platform for engaging with the State's food and wine tourism and hospitality industries.

The six Destination Networks will play a major role. As the principal tourism agencies at a regional level, they will identify gaps and opportunities and support local stakeholders to access the programs that will be offered under the Strategy & Action Plan.

Destination Networks will also work with stakeholders and local Councils to identify and encourage legislative changes that support growth in the food and wine tourism economy.



STRATEGIES OF THE ACTION PLAN

Destination NSW has identified five core strategies to capitalise on the growing interest and demand from domestic and international travellers for high-quality, authentic food and wine experiences.

Strategy 1: Product Development:

Assist the NSW food and wine tourism sector to develop, promote and sell high-quality products and experiences that meet the needs of consumers and the tourism industry

Strategy 2: Industry Development:

Play a leadership role in food and wine tourism and encourage industry collaboration to build capabilities and encourage greater visibility of NSW food and wine product.

Strategy 3: Event Development:

Support the development of sustainable food and wine events and leverage existing events to showcase NSW food and wine.

Strategy 4: Marketing & Public Relations:

Increase the awareness and appeal of the State's diverse range of food and wine experiences and destinations through effective marketing and Public Relations programs.

Strategy 5: Research and Insights:

Undertake, source and share research and insights to inform tourism product development and marketing in the food and wine tourism sector.



STRATEGY 1: PRODUCT DEVELOPMENT

ASSIST THE NSW FOOD AND WINE TOURISM INDUSTRY TO DEVELOP, PROMOTE AND SELL HIGH QUALITY TOURISM PRODUCTS AND EXPERIENCES THAT MEET THE NEEDS OF CONSUMERS AND THE TOURISM INDUSTRY.

CONTEXT

The increasing importance of food and wine in travel decision-making has encouraged the tourism industry to develop new and innovative experiences that will appeal to diverse and changing visitor segments.

Competition for visitors is intense and other Australian states and international destinations are targeting visitors with compelling food and wine tourism offerings.

For many food and wine businesses, tourism-related activities are non-core business often delivered with limited resources. This can impede their ability to deliver a seven-day-a-week offering which consumers and tour operators expect. There is a need for Destination NSW to support these businesses with advice and guidance that will help them navigate the complexities of the tourism market.

Food and wine experiences need to be commercially beneficial to the domestic and international travel trade. This requires the payment of commissions on sales through travel agents, wholesalers, inbound tour operators and online travel agents.














Destination NSW offers the tourism industry access to funding programs for product

development and a wide range of business development tools, such as fact sheets, toolkits and workshops. The agency also provides access to expertise to assist in the development of tourism products and experiences ready for the domestic and international travel trade. These are tailored to meet the needs of the food and wine tourism sector and, in partnership with the six Destination Networks, directed to operators looking for advice and support.

At the State and regional level, Destination NSW is well-placed to identify trends in consumer interest and gaps in, or opportunities for, product development, and to work with the Destination Networks and relevant partners to create an environment in which they can be sustainably developed. Industry feedback has identified food and wine trails and agritourism as possible areas where Destination NSW could play such a leadership role.

The recent strategic development of drives and road trip itineraries offers opportunities to leverage food and wine experiences to build appeal to visitors.



ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
1.1 Undertake an audit and gap analysis of food and wine tourism experiences state-wide to identify product development opportunities and benchmark against the competition	Lead: DNSW Partners: Destination Networks Local Government NSW Wine Industry Association Restaurant & Catering Australia Industry				
1.2 Work with the Destination Networks to build awareness of, and facilitate access to, the Regional Tourism Fund Product Development Program for food and wine tourism businesses seeking to develop new tourism products and experiences	Lead: DNSW Partners: Destination Networks				
1.3 Provide advice and support to food and wine tourism products and experiences seeking to access domestic and international tourist trade markets and understand the markets and visitor segments that their product will appeal to	Lead: DNSW Partners: Destination Networks Department of Industry Department of Primary Industries NSW Wine Industry Association Restaurant & Catering Australia NSW Farmers Association Australian Tourism Export Council				
1.4 Encourage the ongoing development of existing food and wine tourism experiences and products by tailoring Destination NSW's product development tools and workshops to the food and wine industry and promoting their availability to the industry	Lead: DNSW Partners: Destination Networks NSW Wine Industry Association Restaurant & Catering Australia Department of Primary Industries NSW Farmers Association Australian Tourism Export Council Industry				
1.5 a) Identify opportunities for and facilitate the development of food and wine trails b) Work with operators to build content for trails (existing and new)	Lead: DNSW Partners: Destination Networks Local Government Industry				
1.6 Work with the Destination Networks and other key partners to assess existing agritourism experiences and investigate the potential for further development	Lead: DNSW Partners: Destination Networks Department of Primary Industries NSW Farmers Association Industry				

STRATEGY 2: INDUSTRY DEVELOPMENT

PLAY A LEADERSHIP ROLE IN FOOD AND WINE TOURISM AND ENCOURAGE INDUSTRY COLLABORATION TO BUILD CAPABILITIES AND ENCOURAGE GREATER VISIBILITY OF NSW FOOD AND WINE PRODUCT.

CONTEXT

The industry roundtables conducted in the development of this Strategy & Action Plan called for Destination NSW to take a leadership position in bringing the State's diverse food and wine tourism industry together to foster growth in the sector. Quality communication, information sharing and co-operative alliances will be crucial to ensuring cohesion within the NSW food and wine tourism sector.



An opportunity exists for the creation of a regular forum to allow the food and wine tourism industry to come together to share successes, build networks and identify partnerships, discuss best practice and develop a collaborative approach to addressing issues.






Destination NSW already plays a role in providing the tourism industry with access to programs that offer operators insights into the 'business' of tourism and opportunities to develop their skills in all areas of the business to help achieve growth and be competitive. Destination NSW's NSW First workshop program is one of these channels

and it is constantly evolving to meet the needs of industry. Specific content relating to the food and wine tourism sector will be added to the NSW First program.

An opportunity also exists for Destination NSW to work with Government and industry partners such as TAFE NSW and Wine Australia on programs to build skills in related disciplines to ensure the growth of a skilled workforce in the food and wine tourism sector, particularly in regional areas.

Despite having a vibrant food and wine industry, produce and wines from NSW are often not available or their provenance is not promoted on menus and wine lists in restaurants, cafés and venues throughout the State. Some participants in the industry roundtables suggested that distribution pipelines for food and wines make it challenging to source 'local'. These issues can be addressed through partnerships with industry associations such as Restaurant and Catering NSW and the NSW Wine Industry Association.

ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
2.1 Enhance industry leadership through leveraging peak body alliances and communication with industry stakeholders	Lead: DNSW Partners: NSW Wine Industry Association Restaurant & Catering Australia NSW Farmers Association Food Industry Groups Regional Wine Associations Wine Australia Australian Tourism Export Council Industry				
2.2 Convene food and wine forums to coordinate and leverage Government and industry food and wine programs, identify growth initiatives, address limitations such as supply chain constraints, legislative barriers and skills shortages, and provide an environment for industry to grow its networks	Lead: DNSW Partners: Department of Industry Department of Premier & Cabinet Department of Primary Industries NSW Food Authority NSW Wine Industry Association Restaurant & Catering Australia Wine Australia Food Industry Groups Destination Networks Venue Associations Australian Tourism Export Council Industry				

ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
2.3 Integrate food and wine tourism content into NSW First Trade and Industry Development events and resources and identify opportunities to integrate food and wine content in the delivery of other DNSW strategies, such as the Aboriginal Tourism Action Plan	Lead: DNSW Partners: Destination Networks Industry				
2.4 Support the Destination Networks to enable them to provide leadership at the local level and to: <ul style="list-style-type: none"> > Incorporate food and wine tourism in relevant destination management plans > Develop a database of the key food and wine tourism experiences in their region > Maintain up-to-date information on the producers and products in their region to facilitate access for Sydney restaurants and business event providers to showcase NSW produce > Encourage local restaurants, cafés and stores to showcase the produce available in their region by building awareness > Provide guidance to existing and emerging food and wine tourism products and facilitate access to Destination NSW services 	Lead: Destination Networks Partners: DNSW NSW Wine Industry Association Food Producers & Growers Industry Groups eg: Seafood Co-Ops, Beef Industry Assn. Industry NSW local businesses				
2.5 Work with industry to: <ul style="list-style-type: none"> a) Increase NSW wines & beverages featured on Sydney and Regional NSW restaurant wine lists, b) Establish regional familiarisation visits for chefs and sommeliers to increase awareness of regional identities and specialities 	Lead: DNSW Partners: Restaurant & Catering Australia NSW Wine Industry Association Destination Networks Food & Wine Organisations Venue Associations Industry				
2.6 Showcase and celebrate NSW food and wine to national and international delegates at tourism media and trade events, such as the Australian Tourism Exchange; business events such as conventions booked by Business Events Sydney and other conferences in regional NSW; and at all official NSW Government events	Lead: DNSW Partners: NSW Wine Industry Association Restaurant & Catering Australia Industry Business Events Sydney Government Departments Department of Industry Department of Premier & Cabinet				

STRATEGY 3: EVENT DEVELOPMENT

SUPPORT THE DEVELOPMENT OF SUSTAINABLE FOOD AND WINE EVENTS AND LEVERAGE EXISTING EVENTS TO SHOWCASE NSW FOOD AND WINE.

CONTEXT




NSW is home to many well-known food and wine events which enable host destinations to showcase their key product strengths, attract media coverage and encourage consumers to travel to experience their local produce and lifestyle.

Destination NSW encourages food and wine destinations to develop hero events that are themed around the signature food and wine offerings of the region. It is important that destinations work collaboratively with their local food and wine stakeholders to ensure these events have a strong point of difference from others, have a distinctive regional character, are well planned and are marketed appropriately to attract visitors.

In 2017, Destination NSW's Regional Flagship Events Program, which offers grants to events

that have the potential to become flagship tourism events for their region, was expanded to create more opportunities to access funding. The Program now includes three streams: the Incubator Event Fund, which supports new events; the Flagship Event Fund, which supports the promotion of emerging events; and the Event Development Fund, which supports the strategic development of proven, established events.

Destination NSW's support of major events in Sydney and regional NSW, as well as the existing alignment with Business Events Sydney, also provides opportunities to leverage festivals, sporting events and international conferences and conventions to highlight the quality and diversity of NSW's food and wine produce.

ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
3.1 Develop a calendar of food and wine specific events representing the diversity of NSW's food and wine product that is updated annually and promoted to visitors and travel trade partners	Lead: DNSW Partners: Destination Networks Local Government Event Owners NSW Wine Industry Association				
3.2 Continue to support food and wine events in NSW through the Regional Flagship Events Program and encourage their ongoing development to build appeal and attract more national and international visitors	Lead: DNSW Partners: Event Owners Destination Networks Local Government Industry				
3.3 Leverage opportunities to showcase NSW food and wine offerings and build engagement with local producers at existing consumer and business events	Lead: DNSW Partners: Event Owners Business Events Sydney Destination Networks NSW Wine Industry Association Venue Associations Industry				



STRATEGY 4: MARKETING

INCREASE THE AWARENESS AND APPEAL OF THE STATE'S DIVERSE RANGE OF FOOD AND WINE EXPERIENCES AND DESTINATIONS THROUGH EFFECTIVE MARKETING & PUBLIC RELATIONS PROGRAMS.

CONTEXT

Food and wine is a key motivator for visitors to NSW and food and wine content is included in Destination NSW's domestic and international marketing and promotional activities. Food and wine destinations and related product and experiences are also featured in partnership programs with airlines and with wholesale, retail and online travel agents.





However, research suggests that work remains to be done to improve perceptions of the NSW food and wine offering. In a competitive marketplace, NSW needs to create a stronger positioning if it is to achieve its aim of being one of the world's leading food and wine destinations.

Industry stakeholders have suggested an umbrella State-wide food and wine brand that can be leveraged at the local level as a possible approach. Unlike other states, the broad diversity available across NSW makes developing a single identity a challenging exercise and one that may not adequately describe the unique qualities of the individual regions. The feasibility of a unifying NSW food and wine brand needs to be explored.

Destination NSW has begun working to provide support to food and wine regions seeking to define and develop their own unique brand positioning that will form the basis of future marketing and promotional campaigns. It also offers funding programs that support cooperative marketing campaigns, to which food and wine regions are encouraged to apply. The six Destination Networks play a key role in building awareness of these funding opportunities and encouraging applications.

Identifying and leveraging local hero personalities, venues and experiences to drive storytelling about food and wine regions is also seen by the industry as a key strategy to build profile and differentiate the personalities of NSW's food and wine destinations in the minds of travellers. Destination NSW will work with the Destination Networks and the food and wine industry to identify unique stories, develop appropriate content and leverage Destination NSW's expertise in marketing and public relations to bring these stories to market.

ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
4.1 a) Undertake a feasibility study to explore the potential for a state-wide food and wine brand to build awareness and drive overnight visitation to the food and wine regions of NSW. b) Investigate campaign development costs c) Implement campaigns	Lead: DNSW Partners: Destination Networks Industry				
4.2 Work with food and wine regions to identify hero products, experiences, venues and personalities and integrate these into DNSW's annual marketing programs and those developed jointly with stakeholders under the Regional Tourism Fund Co-operative Marketing stream	Lead: DNSW Partners: Destination Networks NSW Wine Industry Association Restaurant & Catering Australia NSW Farmers Association Industry				
4.3 Conduct an audit of existing visual food and wine content, develop new content and implement a content distribution plan to maximise reach through marketing and PR activities, travel trade and industry partnerships	Lead: DNSW Partners: Destination Networks Local Government Industry				

ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
4.4 Continue to integrate food and wine as a core product strength in all domestic and international marketing programs: <ul style="list-style-type: none"> > Promote hero food and wine destinations and regions in national and international marketing programs > Promote food and wine trails to encourage visitation to Regional NSW destinations > Increase consumer engagement via social media > Integrate food & wine experiences in Destination NSW's co-operative partnership marketing campaigns targeting domestic and international audiences > Seek opportunities to feature hero food & wine experiences, local characters, venues and unique produce in major domestic and international broadcast and editorial media > Promote unique Aboriginal and 'bush tucker' ingredients as a distinctive element of Australian cuisine > Utilise culinary ambassadors and key influencers to promote destination food and wine stories in alignment with the food and wine public relations strategy > Ensure new food and wine tourism products are featured in Destination NSW Industry and Media Updates 	Lead: DNSW Partners: Destination Networks Local Government NSW Wine Industry Association Restaurant & Catering Australia Wine Australia Industry				
					
4.5 Promote key food and wine events as a place to experience local produce and meet producers through Destination NSW's It's On! marketing program, PR and digital platforms	Lead: DNSW Partners: Event Owners Destination Networks Local Tourism Organisations NSW Wine Industry Association Restaurant & Catering Australia Industry				
					
4.6 Work with the Destination Networks to build awareness of, and facilitate access to, the Regional Tourism Fund Co-operative Tourism Marketing Program among food and wine destinations and regions	Lead: DNSW Partners: Destination Networks				
					
4.7 Develop & distribute an information kit for culinary 'ambassadors' and other key food and wine industry stakeholders that includes key destination messages and which highlights the importance of the tourism industry and the promotion of local produce in attracting visitation	Lead: DNSW Partners: Destination Networks NSW Wine Industry Association Industry				
					

STRATEGY 5: RESEARCH AND INSIGHTS

UNDERTAKE, SOURCE AND SHARE RESEARCH AND INSIGHTS TO INFORM TOURISM PRODUCT DEVELOPMENT AND MARKETING IN THE FOOD AND WINE TOURISM SECTOR.

CONTEXT

Destination NSW invests in extensive research on domestic and international visitors to NSW undertaken by Tourism Research Australia.

The International Visitor Survey (IVS) and National Visitor Survey (NVS) have recorded data on visitation to wineries for several years, and Destination NSW receives quarterly reports profiling domestic and international visitors to the State.

Destination NSW is also part of the working group that reviews the scope of the research to determine new areas of enquiry. Since 2017, the IVS and NVS have captured data relating to visits to breweries and distilleries and their scope has been further expanded to provide information on visitors' food experiences.

Destination NSW continues to invest in Brand Health tracking to monitor the awareness, appeal and intention to visit Sydney and Regional NSW destinations. In addition, Destination NSW works

with partners such as Tourism Australia to support research initiatives to better understand the motivations of international and domestic visitors to the State, which include some food and wine insights.

Industry consultation identified a general desire for more information specific to food and wine that drills down to the regional level. However, small sample sizes in regional areas can often render the results unreliable. Destination NSW will continue to work with industry to identify information gaps and specific data and insight needs and determine if current research programs can be modified for such purposes.

The industry also requested education on a best practice approach to measuring visitation at the local level, particularly in relation to food and wine events, with support requested for the development of questionnaire templates and a supporting toolkit.



ACTION	PARTNERS	TIMEFRAME			
		2018/19	2019/20	2020/21	2021/22
5.1 Undertake a review and audit of existing food and wine research and statistics available at a national, State and regional level to identify gaps and determine future requirements	Lead: DNSW Partners: Destination Networks Tourism Research Australia Tourism Australia NSW Government Agencies NSW Wine Industry Association Restaurant & Catering Australia Wine Australia Australian Tourism Export Council	●			
5.2 Review current research to identify experience gaps and new trends in the food and wine travel sector to share with industry	Lead: DNSW Partners: Destination Networks Tourism Australia NSW Wine Industry Association Restaurant & Catering Australia Australian Tourism Export Council	●	→		
5.3 Work with industry to develop protocols and toolkits for measuring visitation and insights from the local food and wine industry (e.g. cellar doors, restaurants, events)	Lead: DNSW Partners: Destination Networks NSW Wine Industry Association Restaurant & Catering Australia Australian Tourism Export Council Local Government Event Owners		●	→	
5.4 Conduct a biennial audit of the NSW wines and beverages featured on restaurant wine lists in Sydney and key regional areas to measure growth and inform the ongoing implementation of action 2.5	Lead: DNSW/Destination Networks Partners: NSW Wine Industry Association Restaurant & Catering Australia Australian Distillers Association Independent Brewers Association The Drinks Association Industry		●		●
5.5 Develop case studies of successful food and wine destination development to inform ongoing growth and development of the sector	Lead: DNSW Partners: Tourism Australia Destination Networks	●	→		

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