The Centennial Cellar at Seppeltsfield Wines, Barossa,
Credit: Tourism Australia.

SOUTH AUSTRALIAN INTERNATIONAL WINE TOURISM STRATEGY

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Government of South Australia

SOUTH AUSTRALIAN WINE INDUSTRY
ASSOCIATION INCORPORATED

Introduction

South Australia is indisputably Australia's wine state, producing 50% of all bottled wine and almost 80% of premium wine. The state's wine industry is inextricably linked to our state's character and is a significant economic and cultural asset.

With some of the oldest vines in the world, demand for South Australia's premium wine from international markets continues to go from strength to strength. In the twelve months to December 2017, South Australian wine exports earned $1.56b. This was the best global market result for ten years.

Tourism has likewise been growing strongly. Since 2013, international expenditure in South Australia has grown by 51% and reached $1.1b. As with the wine industry, international tourism has been driven by a buoyant Chinese market and continued strong performance from traditional markets including the US and UK. Wine is a key draw card for our international visitors, with 34% of all international visitors visiting wine regions while in South Australia.

Wine and tourism are natural allies in South Australia; both leverage the natural assets of the state with strong growth prospects through to 2020 and beyond. With Adelaide joining the *Great Wine Capital Global Network* in 2016 and South Australia possessing the jewels in the crown of the *Ultimate Winery Experiences of Australia* network, momentum is building. This International Wine Tourism Strategy seeks to maximise the impact of this sector on the broader South Australian economy, driving increases in visitor expenditure, wine exports and jobs throughout South Australia's 18 wine regions and more than 350 cellar doors.

The potential of the wine tourism market is clear, and it is essential that opportunities are fully leveraged to grow the industry. In 2017 Wine Australia announced the International Wine Tourism Grants program, which forms part of the Australian Government's Export and Regional Wine Support Package (ERWSP). These grants focus on growing international wine tourism by increasing the growth of, and the spend by, these overseas visitors to our wine regions. Activities funded with these grants also need to complement and contribute to the objectives of Tourism 2020. That strategy, in turn, revolves around increasing the competitiveness of Australia's tourism industry by focusing on food and wine tourism. The national objective is to attract 40,000 more international tourists to Australian wine regions by 2019-20, delivering an estimated $170 million in value to the national economy.

To ensure that South Australia reaps the maximum share of this national growth, the South Australian Wine Industry Association (SAWIA) have engaged Primary Industries and Regions South Australia (PIRSA) and the South Australian Tourism Commission (SATC) to develop this strategy. While this strategy outlines the broad range of activity required to grow the international wine tourism industry, it is proposed that the International Wine Tourism State Grant, including co-funding from the South Australian Government through PIRSA, focus on the priority markets and the direct to consumer approach as outlined in this strategy.

Lake Breeze Wines, Langhorne Creek
Credit: Robyn Follett

Strategic Context

This South Australian International Wine Tourism Strategy builds on the existing industry strategies, for both the wine and tourism industries, by focussing specifically on the role of international wine tourism in benefiting both the South Australian wine industry and the South Australian tourism industry. It builds on the expert knowledge and actions identified as core to the development of both industries and draws these together to provide a strategic direction for growth in international wine tourism.

Specifically, the Premier's Economic Priorities identify both Tourism ('Destination of Choice') and Wine ('Premium Food and Wine') as key drivers of growth for the South Australian economy.

Wine Strategies

The Australian Wine Industry has been guided by a series of strategies and plans over the last decade. Strategies such as 'Directions to 2025', developed in 2007, focused on the business capability and breadth of offer. As the industry continued to develop, these plans tended to move towards a greater focus on maximising the growth in the industry through improving demand. The 'Wine Australia Strategic Plan 2015-2020' highlighted two key strategies, one focussed on demand and the other on the competitiveness of the industry. A consistent theme throughout this strategic framework is a push towards an increased focus on premium wine and appropriate marketing to a highly defined audience.

However, while these strategies provided strong guidance for the development of the wine export industry, there has been little focus in the past on specifically targeting wine tourism, and particularly, international wine tourism.

Tourism Strategies

The South Australian Tourism Plan 2020 sets the direction, approach and targets for growing the visitor economy, and specifically international tourism, in South Australia. Established in 2014, it set a bold ambition to grow the visitor economy from $5.1b to $8.0b by December 2020. Within this, a goal of achieving $1.2b in international visitor expenditure, which at the time was a growth in excess of 70%. With almost 3 years still to run in this strategy, the state has already grown international expenditure by over 50%.

Operationalising the Tourism Plan, the South Australian Tourism Commission (SATC) has brand guidelines that underpin all communications about the tourism experience in South Australia. The first of these four brand pillars is “Food and Wine”, and the application of these ensure consistency in messaging and imaging in marketing South Australia as tourism destination. The SATC brand guidelines strive to evoke feelings of fulfilment, relaxation and inspiration, freedom and stimulation. The brand identifies personality traits to be conveyed by a South Australia food and wine experience; authentic, boutique, contemporary, immersive and vibrant.

International Wine Tourism Programs

On 1 July 2016, Adelaide, South Australia, became a member of the prestigious *Great Wine Capitals Global Network*, joining a group of international cities whose wine regions are recognised as significant economic and cultural assets. Membership acknowledges excellence in grape and wine production, a commitment to research and development, education and wine tourism services.

Membership significantly lifts the bar for Adelaide and South Australia in terms of international profile, because the Great Wine Capitals Global Network is synonymous with premium food and wine tourism experiences. Through this membership South Australia delivers the Best of Wine Tourism Awards program, rewarding and building excellence in wine tourism. This is further supported through alignment to other programs, including the South Australian Wine Industry Development Scheme, building capacity in cellar doors and wine regions in South Australia.

A number of South Australian wineries participate in the *Ultimate Winery Experiences of Australia* network, in conjunction with Tourism Australia, which drives awareness and appeal to an international audience.

Novotel Barossa Valley Resort, Barossa
Credit: Novotel Barossa Valley Resort

Key Insights

Wine as an International tourism driver

Wine is a key driver of international visitors to Australia, with almost a million visitors, or 14% of the total visiting a wine region while in Australia. South Australia, with our strong reputation for quality wine and easily accessible wine regions, has the highest instance of wine region visitation of any state, with more than a third (34%) of our international visitors spending time in our wine regions. This is more than double the national average and many times higher than Victoria (12%), New South Wales (7%) and Queensland (2%).

In terms of overall number, South Australia is ranked 4th behind Victoria, New South Wales and Western Australia. This is due to the high volume of international visitors to those states compared to South Australia. This demonstrates the significant opportunity for South Australia to grow, driven by our premium wine offering and world-renowned wine regions.

International Visits to Wine Regions in Australia

Source: International Visitor Survey Wine Supplement, 2014/2015

Wine Regions Visited in South Australia

South Australia's 18 wine regions include the Coonawarra in the South East, Kangaroo Island, the Southern Flinders and the Riverland, providing a diverse range of experiences for the international visitor.

However, international visitation is concentrated in three key regions; 62% visited the Barossa, 27% visited McLaren Vale and 22% visited the Adelaide Hills, with some visiting multiple regions. These three regions share a strong product offering with their proximity to Adelaide, the entry point for more than 90% of our international visitors. There are 200 cellar doors within an hour's drive of Adelaide, which is just the beginning of South Australia's wine narrative.

The table below shows how tourism regions and wine regions in South Australia relate to each other. For further detail please refer to the maps in Appendix A and B.

Annual Average International Overnight Visits September 2015 - September 2017

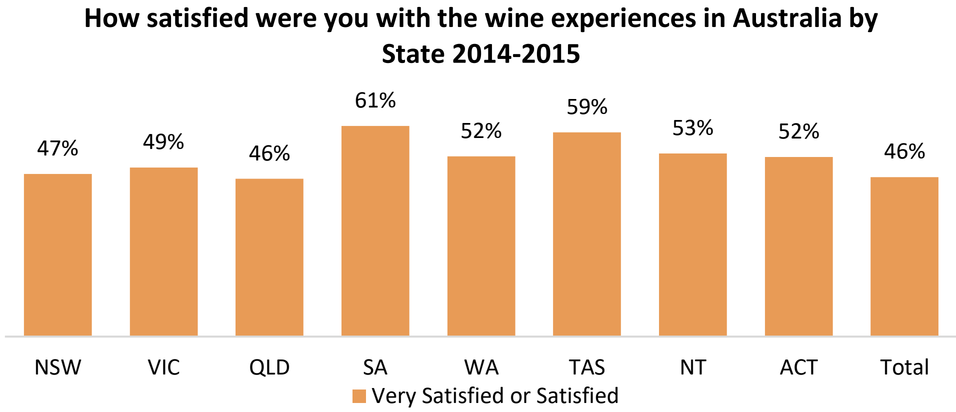
SA Tourism Region	SA Wine region/s contained within	Overnight Visits and expenditure in tourism region (all purposes)		Comments
Adelaide Hills	Adelaide Hills	7,000	$7m	Tourism Region is entirely a wine region
Barossa	Barossa Valley, Eden Valley	12,000	$14m	Tourism Region is entirely a wine region
Clare Valley	Clare Valley, Adelaide Plains	4,500	$3m	Tourism Region is entirely a wine region
Fleurieu Peninsula	McLaren Vale, Southern Fleurieu, Langhorne Creek, Currency Creek	22,000	$13m	Tourism Region is entirely a wine region
Flinders Ranges & Outback	Southern Flinders Ranges	39,000	$13m	One wine region in very large tourism region
Kangaroo Island	Kangaroo Island	43,000	$30m	Small wine region
Limestone Coast	Mt Benson, Robe, Padthaway, Wrattonbully, Coonawarra, Mt Gambier	45,000	$16m	Multiple wine regions in very large tourism region
Riverland	Riverland	7,000	$6m	Tourism Region is entirely a wine region

Source: International Visitor Survey, Sept 2015-2017. Not Shown: Adelaide, Eyre Peninsula, Yorke Peninsula, Murray River, Lakes and Coorong.
Regions are listed alphabetically.

Note that the figures above are only for visitors who stayed overnight in the region, which in many cases is a minority of the overall international visitors to the region, especially for those regions directly bordering Adelaide. Through the International Visitor Survey, it is estimated that there were 160,000 international day trips to the Adelaide Hills, more than 20 times higher the number of overnight visitors. 80,000 international day trips are estimated for the Barossa, and 40,000 for McLaren Vale.

Visitor Satisfaction

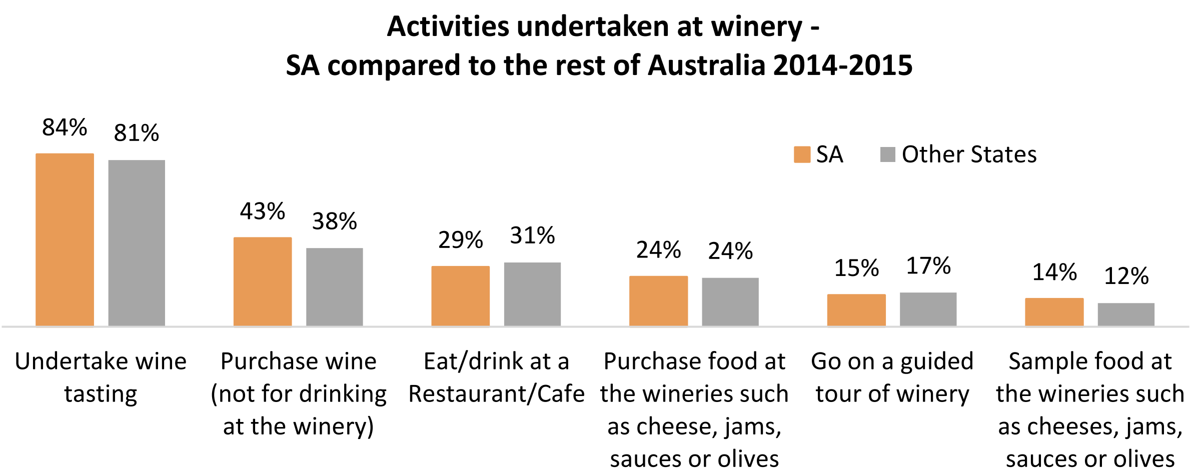
South Australia has the highest level of visitor satisfaction for wine experiences of any state in Australia, with 61% of visitors agreeing that they were satisfied or very satisfied with their experience. The nearest competitor is Tasmania, at 59% and representing only a quarter of the wine visitors that South Australia receives.



Source: International Visitor Survey Wine Supplement, 2014/2015. Note that samples for NT and ACT are relatively low.

Activities undertaken at a winery

Activities undertaken while at wineries across the country is largely consistent, with the exception of visitor's higher propensity to purchase wine while in South Australian wine regions (43%) compared to the other states (38%). We hypothesise that this is related to South Australia's strong visitor satisfaction results and the higher levels of premium wine on offer.



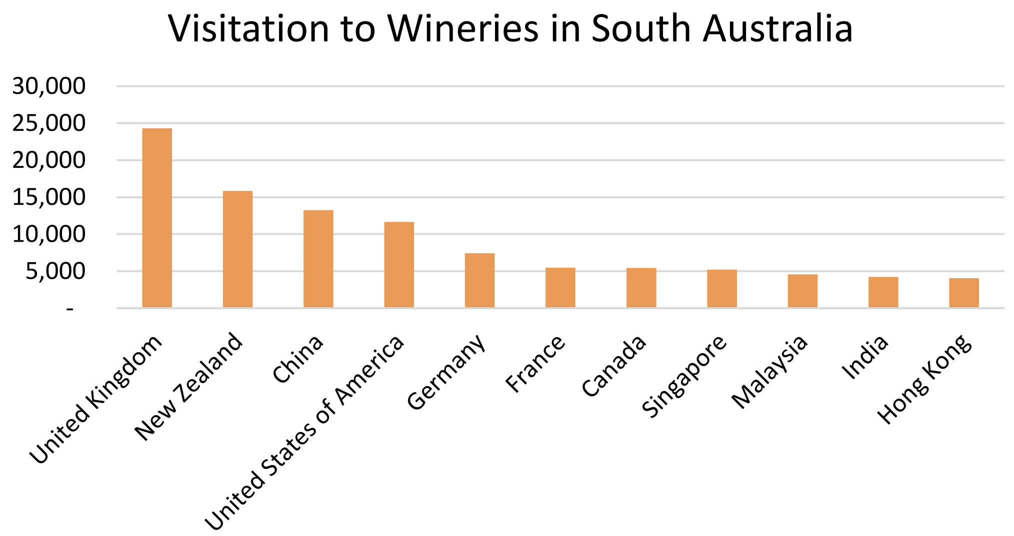
Source: International Visitor Survey Wine Supplement, 2014/2015

While undertaking wine tasting is by far the most common activity at a winery, it is important to note the food and tour options also represent significant volumes of visitors, and most importantly, drive increases in overall yield per visitor. Focus on product development in this area is worth strong consideration and offers a relatively untapped opportunity for increased turnover and business diversification.

Jacobs Creek, Barossa
Credit: Tourism Australia

Market Prioritisation

South Australia has a broad base of international visitation, and visitation to wineries is strong among all markets. The top 5 markets for visitation to South Australia overall are the UK, NZ, China, the US and Germany. It is therefore not surprising that these are also the five largest markets for visitation to wine regions.

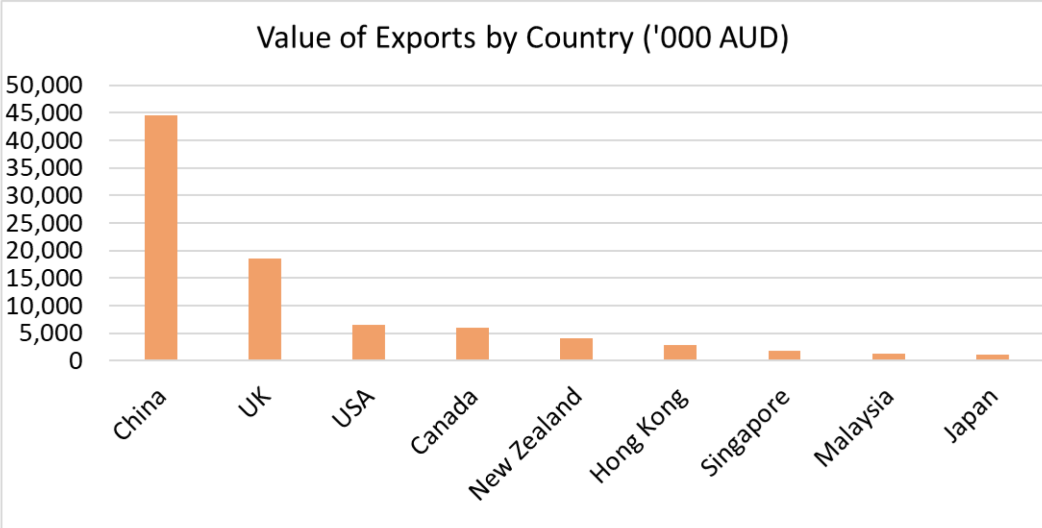


Source: International Visitor Survey Wine Supplement, 2014/2015

From a continent perspective, Europeans are the largest group of visitors to South Australian wine regions, with the United Kingdom being the most prominent country. Asian visitation to the wine regions is beginning to grow in line with the increase in Chinese visitors.

There is remarkably little variation in the instance of visitation by country with most countries in the range of 25% to 42% visiting wine regions, showing the broad appeal of wine experiences.

Key tourism markets and key wine export markets have a broadly similar ranking, with eight out of the ten top countries appearing in both lists.

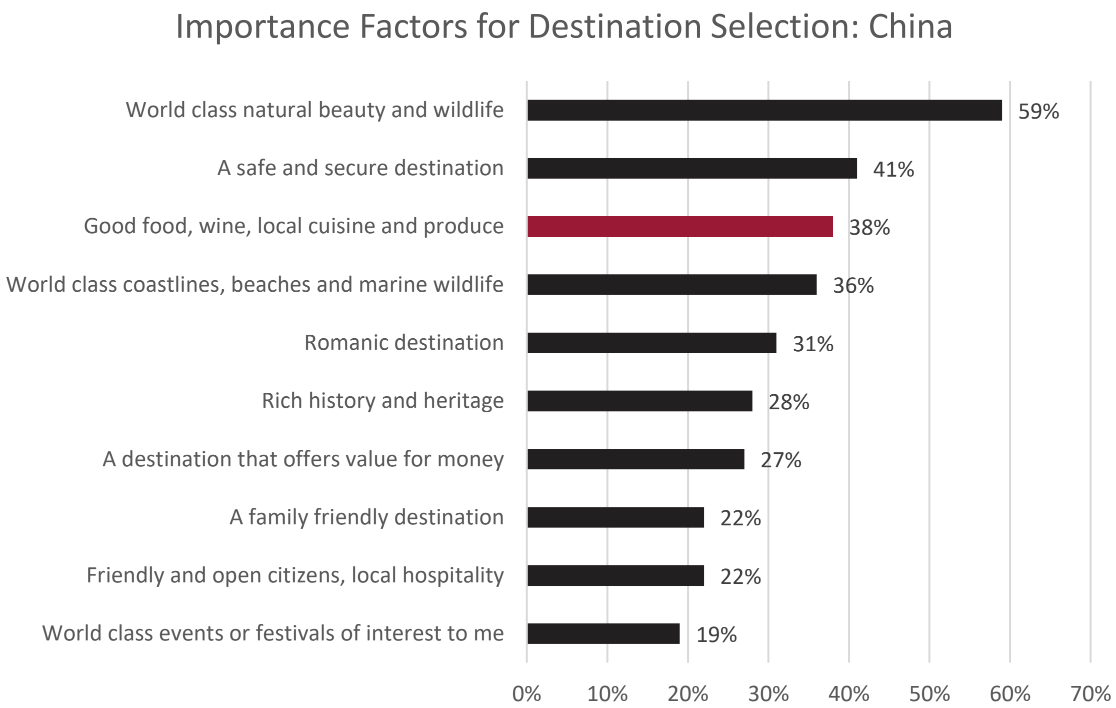


Source: South Australia Export Report: Bottled Wine MAT December 2017

Bringing both export and tourism volumes together, we arrive at three key markets of priority for South Australia for wine tourism. China, with its current strong tourism volumes, high propensity to visit wineries, strong forecast tourism growth and leading export value is an obvious lead market. The USA, while only 4th highest in tourism volumes, has strong future potential and is a substantial export market with significant attention expected in that market to drive value and volume of exports through to 2020. The final priority market is the UK, which is currently our largest wine tourism market and represents substantial export earnings.

Priority Market 1: China

For the rapidly growing Chinese visitor market, wine is an aspirational consumer product and has considerable status value. SATC research in China shows good food and wine is a key driver of destination selection, with 38% of the market finding this important. The strongest driver is “world class beauty and wildlife” (59%), which highlights the opportunity of linking these two strengths for South Australia through winery experiences, both through raising awareness of the scenic beauty of the vineyards and surrounding countryside, as well as the accessibility of wildlife experiences in the near vicinity.



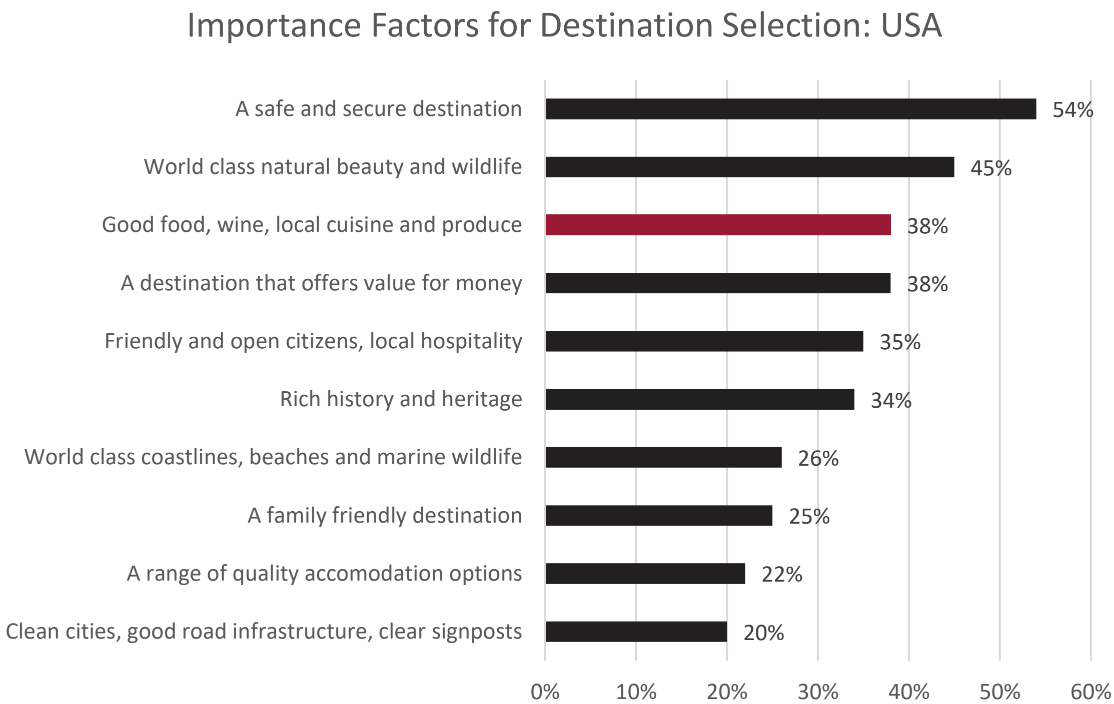
Source: Tourism Australia / BDA; Consumer Demand Project 2017

Aligning with both existing visitation as well as our wine export, our focus in China will be the cities of Hong Kong, Shanghai and Guangzhou. South Australia’s sister-state relationship with Shandong province also provides good opportunities for wine export, while Beijing remains a substantial export market as well as a mature tourism source market.

The SATC has developed a detailed resource kit for tourism operators to harness the Chinese market. This can be viewed on the SATC Corporate website:
http://tourism.sa.gov.au/events-and-industry/industry-support/understanding-china

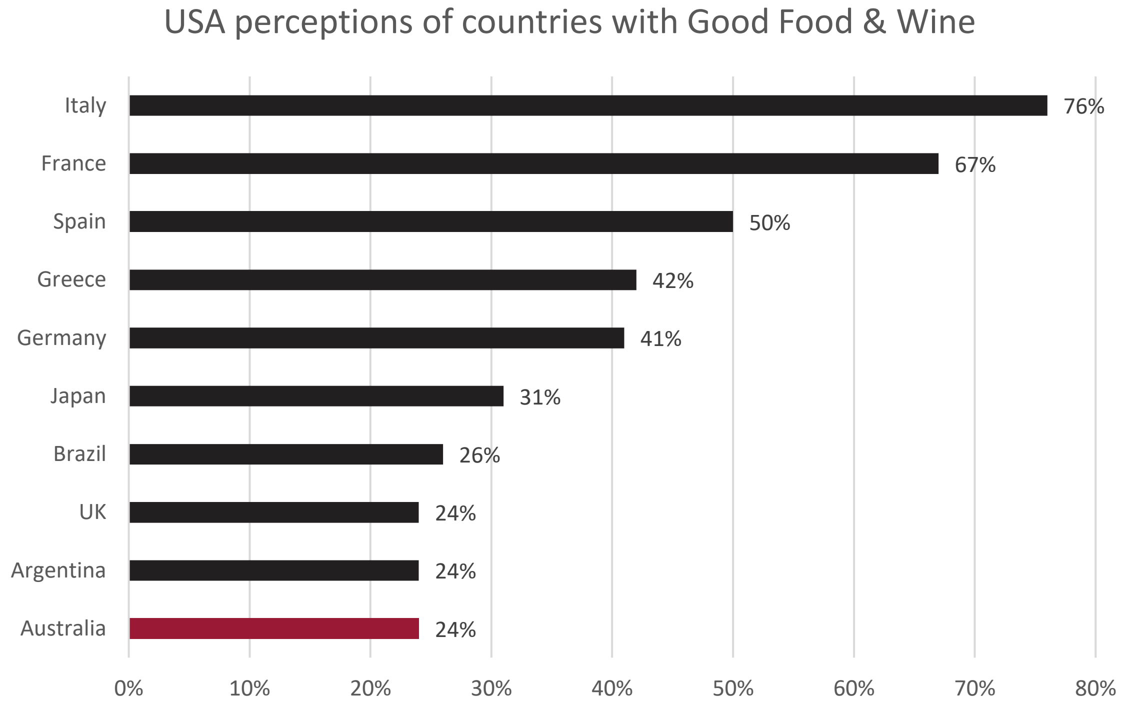
Priority Market 2: United States of America

For travellers from the USA, safety and security is the most important factor when choosing a holiday destination, and in this, Australia has a strong reputation and thus a competitive advantage. As with the Chinese, nature and wildlife is a strong driver, with food and wine again coming in third.



Source: Tourism Australia / BDA; Consumer Demand Project 2017

While it is clear that travellers from the USA value good food and wine in a general sense, perceptually, Australia has a poor reputation in the US, being ranked 10th behind a predominately European list of rival countries. This perceptual gap represents a significant opportunity if the premium range of South Australian wines can be credibly communicated to this market.



Source: Tourism Australia / BDA; Consumer Demand Project 2017

The USA is a very substantial country, and one mass market approach will spread resources far too thinly. A target city strategy should be adopted including Dallas, Austin and Los Angeles.

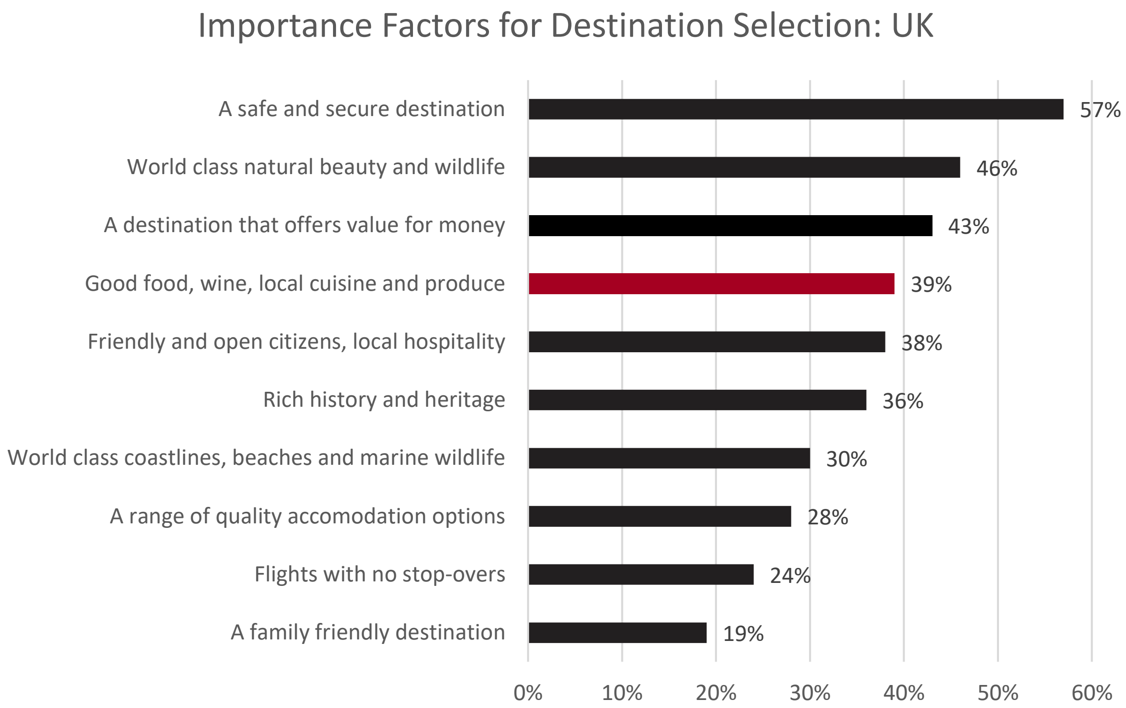
Priority Market 3: United Kingdom

The UK is South Australia's biggest market by overall visitors as well as visitors to wineries. As our second largest export market, the UK is substantial in all aspects of the wine tourism industry.

Almost one out of every five international visitors to wineries in South Australia are from the UK due to their high propensity to visit wineries, as well as their likelihood to stay longer and disperse more widely across South Australia than those from China or the US.

With almost half of UK visitors to South Australia here for the purpose of visiting friends and relatives, they are far more likely than other markets to visit wineries amongst a group of local South Australians, and thus their impact is likely to be less visible.

More so than our other Priority markets, the UK visitor seeks value for money in their tourism destination, with Good Food and Wine dropping into 4th place as a driver of destination selection. It is important to consider that good value does not mean low price, but that the value proposition needs to be clearly demonstrated to unlock the expenditure potential of this market.

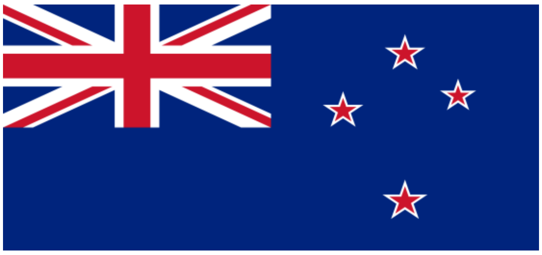


The wine export market for the UK has been challenging in the longer term, declining by 17% to $239m since 2014. It is therefore essential that tourism be used to drive a perceptual change within this market to reflect the premium wine that South Australia has to offer. The focus will be on London and Edinburgh.

Secondary Markets

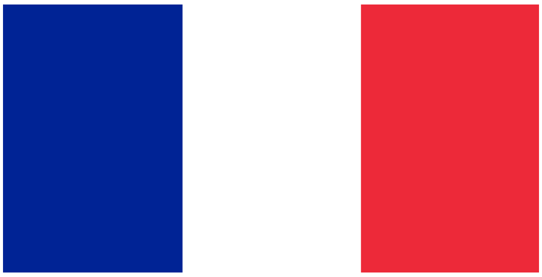
Several other markets also represent high value to the wine tourism industry, but not to the degree of China, the USA and the UK. These markets should be considered where a broader target of consumers is possible, as well as tailoring product at the cellar-door.

New Zealand



New Zealand is a substantial inbound market for South Australia, with a particularly strong interest in the Murray River and houseboats. While the wine export volumes are not significant, the visitation at the cellar door level is.

France



France is a smaller tourism market for South Australia, but with its strong propensity to visit wine regions the market is a significant player in the wine tourism space. Substantial growth is expected from this market due to linkages through the Great Wine Capitals program and new defence contracts.

With an anticipated 2000 additional French residents in South Australia arriving in the coming years, the Visiting Friends and Relatives (VFR) market is likely to grow substantially.

Canada

The Canadian market has many elements of the US market, being the 4th highest market for wine exports and the 7th highest market for winery visitation. There are also likely to be synergies due to proximity and cultural similarity to the US market.

Detailed descriptions of all of these markets can be viewed on the SATC Corporate Website: http://tourism.sa.gov.au/research-and-statistics/south-australia/international-market-profiles

The Barn, Mount Gambier
Credit: The Barn

Priority Action Areas

The South Australian International Wine Tourism Strategy utilises the strategic framework as developed by the South Australian Tourism Plan 2020. Through extensive consultation with over 400 individuals in 2014, the Tourism Plan identified five Priority Action Areas that would have the most significant impact on the South Australian visitor economy, setting the path to reaching $8.0b in visitor expenditure by December 2020.

As the objective of this strategy is to increase the number of international visitors to wine regions, as well as expenditure by these visitors, it is not sufficient to simply produce outstanding wines, but rather to deliver outstanding tourism experiences that leverage our outstanding wine.

Driving Demand

As the primary action of the South Australian International Wine Tourism Strategy, it is essential that we drive awareness and appeal of South Australian wine tourism products, which in turn results in increased visitor numbers and expenditure in our wine regions.

We will develop a targeted consumer marketing campaign across selected cities in three key markets: the United States, the United Kingdom and China.

Adelaide is the entry point for more than 90% of international visitors to South Australia; therefore target cities will be selected based on accessibility via direct/one-stop flights into Adelaide, as well as other factors such as propensity of visitors to travel for wine experiences, availability of premium South Australian wine in the target city and the ability to build on existing relationships.

This targeted approach will enable us to trial the effectiveness of the campaign in year one, with measurement and review allowing for the potential for increased and/or refined activity in year two.

We will promote Adelaide as the gateway to South Australia's wine regions, inviting consumers to: visit Adelaide – the wine capital of Australia. Creative will be developed to showcase hero wine tourism experiences with demonstrated high appeal to the respective international audiences. We will then build out the full range of wine experiences and locations through subsequent digital targeting.

The dedicated marketing campaign will drive increased awareness of and visitors to South Australia's wine regions, aiming to achieve an additional 10,000 international visitors to wine regions and an additional $10m in expenditure in those regions.

Key actions:

- Drive appeal and prestige of South Australian wine and wine tourism experiences through new 'direct to consumer' international marketing.
- Develop new campaign materials inviting consumers to visit Adelaide – the wine capital of Australia.
- Utilise credible external voices known to our international audience to promote South Australia's winery experiences.
- Drive increased awareness and appeal into conversion through digital target marketing to our most valuable consumers.
- Drive positive awareness and uptake by hosting travel wholesaler familiarisation trips (famils) from target market cities/states.
- Work with regional wine associations to encourage wineries to develop commissionable product and enter details in the data warehouse.

Working Better Together

A collaborative approach, utilising the key assets of State Government and industry will be essential to success.

Key actions:

- Drive collaboration across key partners such as the South Australian Tourism Commission (SATC), Primary Industries and Regions South Australia (PIRSA), South Australian Wine Industry Association (SAWIA), South Australian Tourism Industry Council (SATIC), Tourism Australia and Wine Australia as well as with prominent wine brands with an existing international presence.
- Work with wine regions and wineries that deliver high quality experiences to increase visitation and expenditure from international markets.
- Ensure South Australian representation by appropriate partners at key international tourism trade events that drive consumer appeal.

Supporting What We Have

Ensure existing assets are fully utilised.

Key actions:

- Utilise the existing 'Great Wine Capitals Global Network' to drive awareness, prestige and appeal.

- Utilise the existing ‘Ultimate Winery Experiences of Australia’ program, in conjunction with Tourism Australia, to drive awareness and appeal.
- Ensure the full value of established wine experiences are realised by showcasing through media channels.
- Support existing wineries to develop new and innovative consumer experiences in line with this strategy.
- Utilise the existing South Australian Touring Routes, particularly the Epicurean Way, the Southern Ocean Drive and the Mighty Murray Way, to facilitate trip planning and encourage visitation to, and deep engagement with, multiple wine regions.
    - These Touring Routes appear in Appendices C, D and E.

Recognising the Value of Tourism

While Driving Demand directly to our wineries is of primary importance, ensuring our actions are well understood through advocacy will ensure the long-term success of the strategy.

Key actions:

- Ensure the value and opportunity of wine tourism are well understood by wine producers, as well as at all levels of government and within the community.
- Show the contribution of wine tourism in South Australia to the overall growth of the industry more broadly.
- Demonstrate the synergistic linkages between wine tourism and wine exports.

Using Events to Drive Visitation

Key consumer events located in South Australia contribute to the wine experiences on offer. These can be grown and developed to ensure they drive wine tourism towards the desired outcomes.

Key actions:

- Ensure key events, particularly Tasting Australia, drive appeal for, and visitation to, South Australian wine regions.
- Utilise the international broadcast value of major events, particularly the Tour Down Under, to showcase the scenic beauty of our wine regions, thus driving appeal.
- Drive awareness of regional wine festivals to international audiences.

Banrock Station Wine & Wetland Centre
Credit: Accolade Wines

Measurement and Accountability

It is essential that robust measures be used to quantify the effectiveness of proposed actions as outlined in this strategy. Through consultation with the South Australian Wine Industry Association, Primary Industries and Regions South Australian and the South Australian Tourism Commission, the following metrics will be used to track the success of this strategy.

Tourism Metrics

The following metrics outline the tourism specific metrics from the South Australian Tourism Plan 2020, which seeks to grow visitor expenditure in South Australia (from all sources) to $8.0b by 2020. The International component of this is $1.2b.

The International tourism sector has been strong since the commencement of the South Australian Tourism Plan in 2014, with 51% expenditure growth, driven strongly by China, Asia and the USA. Many of these markets are now at or nearing their targets for 2020. Despite this unprecedented growth, this strategy aims to exceed these targets.

	December 2013 (start of SA Tourism Plan 2020)	Sept 2017 Actual (latest available)	Growth since 2013	December 2020 Full Potential
International	**$728m**	**$1.1b**	**51%**	**$1.2b**
China	$129m	$371m	188%	$370m
United Kingdom	$82m	$86m	5%	$116m
USA	$37m	$73m	97%	$71m
New Zealand	$45m	$54m	20%	$58m
Germany	$31m	$31m	0%	$33m
Europe (ex UK & Germany)	$113m	$86m	-25%	$85m
Asia (ex China)	$233m	$360m	55%	$433m
All Other	$59m	$39m	-32%	$72m
Total Domestic Expenditure	**$4.4b**	**$5.2b**	**19%**	**$6.8b**
Total Expenditure	**$5.1b**	**$6.3b**	**23%**	**$8.0b**

Likewise regional areas of South Australia have also grown tourism expenditure, up 14% and led by key strong growth from the Adelaide Hills (46%) and the Clare Valley (39%). As with origin market targets, where performance has been strong the SATC aims to exceed the stated 2020 Full Potential.

Regions	December 2013	Sept 2017 Actual (latest avail.)	Growth since 2013	December 2020 Full Potential
Regional South Australia	**$2.2b**	**$2.5b**	**14%**	**$3.5b**
Barossa	$164m	$179m	9%	$273m
Adelaide Hills	$108m	$159m	46%	$177m
Clare Valley	$71m	$99m	39%	$99m
Kangaroo Island	$104m	$120m	15%	$168m
Fleurieu Peninsula	$393m	$432m	10%	$683m
Limestone Coast	$271m	$311m	15%	$457m
Riverland	$142m	$163m	15%	$231m
Murray River, Lakes & Coorong	$123m	$139m	13%	$196m
Flinders Ranges & Outback	$318m	$410m	29%	$452m

Yorke Peninsula and Eyre Peninsula not shown as they do not contain officially recognised wine regions.
The above table is total expenditure by region (international + domestic), for which 2020 targets are available.

International Wine Tourism

In addition to these metrics specific targets have been set to directly reflect the incidence of International Wine Tourism. International visitation and expenditure will be tracked for overnight stays in an aggregate of South Australian "wine regions". Additionally, the incidence of having "visited a winery" will be tracked to reflect the impact of the actions undertaken.

Area	Baseline	Growth target	2020 target
International overnight visitors to "wine regions" aggregate	82,000	10,000	92,000
International overnight visitor expenditure in "wine region" aggregate	$64m	$10m	$74m
Incidence of international visitors having visited a winery while in South Australia	34%	10%	44%

Wine Export Metrics

South Australian Wine exports are worth $1.56b driven strongly by growth from the China & Hong Kong market, whereas export growth was not realised in the US or UK markets. These top 3 markets for export are also the Priority Markets for this International Wine Tourism Growth Strategy and performance will be monitored closely.

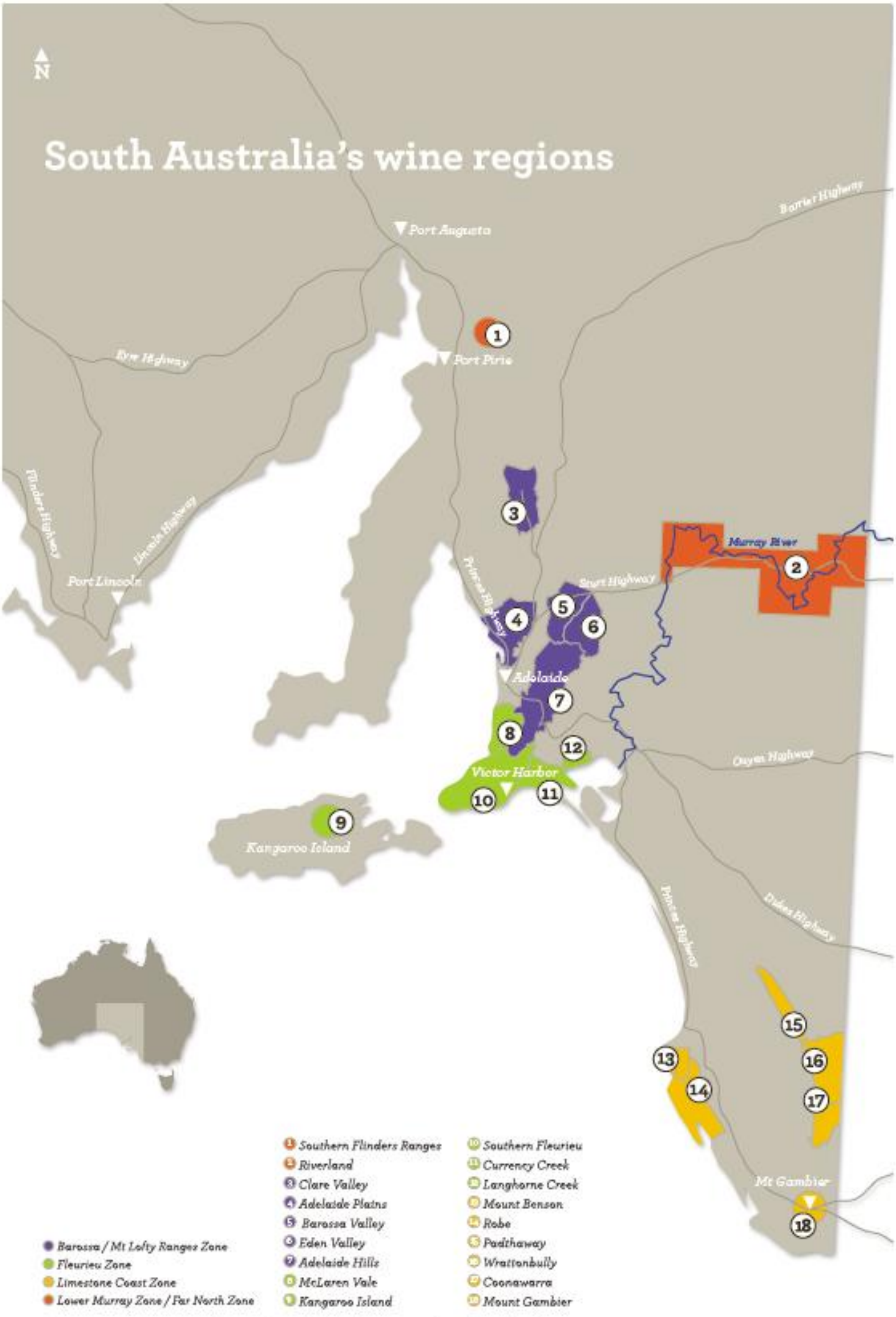
Wine Tourism Industry Metrics

Ensuring that the wine industry is fully engaged with the tourism sector is essential to the success of this strategy. The best measure of this is the number of wineries with listings in the Australian Tourism Data Warehouse (ATDW). These listings are funded by the SATC and ensure that the wineries are promoted through SouthAustralia.com, as well as Australia.com (run by Tourism Australia) and a wide range of third party research and booking sights. It also allows for digital campaigns to promote a much wider range of winery experiences than would otherwise be possible.

It is essential that the South Australia’s wine tourism experiences are listed and up to date to ensure the maximum value of broad promotional campaigns can be realised.

	December 2017
ATDW Listings for ‘Wineries’	**186**
Barossa	76
Fleurieu Peninsula	35
Limestone Coast	25
Adelaide Hills	23
Clare Valley	13
Riverland	7
Kangaroo Island	2
Adelaide	2
Flinders Ranges	1
Yorke Peninsula	1

Appendix A: South Australia's Wine Regions



Note some regions are not portrayed to actual geographical size, but in terms of their volume of production.

Appendix B: South Australia's Tourism Regions

Approximate distance & drive times from Adelaide	kms	hrs/mins
Baird Bay	720	8:30
Cape Jervis	107	1:30
Ceduna	773	8:45
Clare	135	1:50
Coober Pedy	842	10:00
Hahndorf	26	0:30
McLaren Vale	40	0:40
Mannum	88	1:20
Mount Gambier via Hwy One	435	5:00
Murray Bridge	76	1:00
Naracoorte	340	4:00
Penola/Coonawarra	385	4:30
Port Augusta	304	3:30
Port Lincoln	645	7:30
Renmark	254	3:00
Robe	335	3:40
Tanunda	70	1:00
Victor Harbor	80	1:20
Wallaroo	159	2:00
Whyalla	378	4:30
Wilpena Pound	453	5:30

Appendix C: Epicurean Way Touring Route

Appendix D: Southern Ocean Drive

Appendix E: Mighty Murray Way

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ASSOCIATION INCORPORATED