Review of Wine Tourism and Wine Exports

Issues Paper

July 2002
1. Introduction

1.1 The Review

ACIL Consulting (ACIL) is conducting a review to “examine and make recommendations on possible actions which can be taken to enhance the long term profitability of small/medium sized wineries with specific emphasis on wine exports and wine tourism.” The review will be completed by the end of October 2002.

The review was a pre-election commitment by the Commonwealth Government. It is being managed by the Department of Agriculture, Fisheries and Forestry — Australia (AFFA), in conjunction with the Department of Industry, Tourism and Resources (ITR). ACIL will report to the Commonwealth Government. In conducting the review ACIL is working with a steering committee comprising Margaret McKinnon (AFFA) (Chair), Bob Pegler (ITR), Bruce Tyrrell (Winemakers’ Federation of Australia) (WFA), Paul Chambers (WFA), Ross Brown (WFA), Jane Mitchell (Australian Wine and Brandy Corporation) (AWBC), and John Geber (industry wine tourism representative).

1.2 ACIL Team

The ACIL team comprises David Trebeck, Greg Martin and Phil Harman:

- David Trebeck is ACIL’s Managing Director, has undertaken many industry reviews in agriculture and elsewhere over a 30 year professional career and was, until its takeover late last year, an independent director of Pipers Brook Vineyard.

- Greg Martin has been with ACIL for over 15 years and has undertaken numerous assignments in the wine industry, especially for WFA, including the impact of tax reform and a 2001 study which assessed the wine industry’s economic contribution to Australia.

- Phil Harman operates his own consulting company, specialising in tourism and transport. While with Annells Consulting, he managed the development of a national wine tourism strategy on behalf of the WFA, now being implemented.

1.3 Terms of Reference

The terms of reference (TOR) require the consultant to:

- review the contribution of tourism and exports to the profitability and competitiveness of wineries;
examine opportunities and impediments for smaller and medium sized wineries to expand exports and tourism;

- consider current or proposed initiatives (whether individual business, the overall industry or governments); and

- make recommendations regarding additional actions for individual businesses, the industry or governments, in relation to wine tourism and exports.

The key elements of the terms of reference are thus:

- wineries (not grapegrowers — though the two are obviously related);
- small and medium sized;
- tourism and exports; and
- profitability and competitiveness.

1.4 Inquiry Process

Having met with the steering committee, we are in the process of absorbing relevant background material. We will undertake an extensive round of consultations — involving a number of regional winery visits, plus discussions with key industry and government organisations and other interested parties. Then we will prepare a draft report which will be discussed with the steering committee, prior to being finalised.

Because of the nature of the inquiry and the timetable for it, we are not calling for formal submissions. However, we are keen to receive relevant descriptive material and ideas. These may be conveyed verbally or in writing — preferably by email. We are happy to treat information on a confidential basis if appropriate.

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1.5 This Issues Paper

This issues paper has been prepared to inform people about the review and to encourage inputs to it. After spelling out some background information the paper discusses issues the review will need to assess. A number of questions are posed; these are intended to stimulate responses.

The regional visit program is outlined, so that those wishing to attend can make their plans accordingly. Unfortunately, it will not be possible to
attend every wine region, although another opportunity will occur at Wine Australia.

2. Relevant Wine Industry Background

2.1 Structure and Recent Wine Industry Growth

The wine industry’s recent dynamic growth has been well documented in a range of industry and other publications.

From 80000 hectares in 1996, the industry’s size increased to 146000 hectares by 2000, of which 85 percent was actually planted to vines. That meant that the agreed industry target in its 1996 strategy document — for an additional 40000 ha to be planted by 2022 — had been achieved in just four years.\(^1\) Twelve percent of the planted vineyards were not yet in production.

The latest Wine Industry Directory lists 1465 wineries in 2001, an increase of 11 percent on a year earlier.\(^2\) Other highlights from this publication, relevant to the current review, include:

- in 2001 red wine production exceeded white wine for the first time ever;
  - yet the area of red wine vines is nearly 60 percent higher than white wine (91000 ha versus 57000 ha);
- domestic sales in 2001 were 385 Ml, and were being rapidly approached by export sales (375 Ml, valued at $1.8 billion);
  - domestic sales of red wine in 2001 were 40 percent of the total and white 60 percent; in 1988 these were 20 and 80 percent respectively;
- Australia now ranks 7\(^{th}\) in production and 5\(^{th}\) in exports on a world scale;
- South Australia remains the State with the largest area of vineyards (42 percent of the national total), followed by Victoria (24 percent) and NSW (23 percent);
  - Western Australia’s area increased by 32 percent in 2001 over 2000;
- over 90 grape varieties are grown in Australia;
  - Chardonnay represents 32 percent of the white wine area, followed by Sultana (which is declining), Semillon, Riesling and Sauvignon Blanc;

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Shiraz is the most popular red wine variety (37 percent), closely followed by Cabernet Sauvignon (31 percent), then Merlot and Pinot Noir.

Table 1 shows the growth in winery numbers over the past two decades. These are now four times the number of wineries there were in the early 1980s. The increase is broadly based but has been greatest in Victoria and Tasmania.

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>NSW/ACT</th>
<th>VIC</th>
<th>QLD</th>
<th>SAINT</th>
<th>WA</th>
<th>TAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1983</td>
<td>344</td>
<td>76 (22%)</td>
<td>66 (19%)</td>
<td>15 (4%)</td>
<td>111 (32%)</td>
<td>73 (21%)</td>
<td>3 (1%)</td>
</tr>
<tr>
<td>1992</td>
<td>701</td>
<td>161 (23%)</td>
<td>204 (29%)</td>
<td>19 (3%)</td>
<td>184 (26%)</td>
<td>108 (15%)</td>
<td>25 (4%)</td>
</tr>
<tr>
<td>2002</td>
<td>1465</td>
<td>331 (23%)</td>
<td>416 (28%)</td>
<td>74 (5%)</td>
<td>353 (24%)</td>
<td>220 (15%)</td>
<td>70 (5%)</td>
</tr>
</tbody>
</table>


In terms of the size distribution of wineries, Table 2 shows that most are small — 84 percent crushing less than 500 tonnes. This distribution has been fairly constant in recent years. The table indicates that the highest concentration of smaller wineries is in Tasmania, Queensland and Victoria, and the lowest is in South Australia.

<table>
<thead>
<tr>
<th>Crush</th>
<th>Total</th>
<th>NSW</th>
<th>VIC/ACT</th>
<th>QLD</th>
<th>SAINT</th>
<th>WA</th>
<th>TAS</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;20t</td>
<td>418</td>
<td>72 (22%)</td>
<td>148 (35%)</td>
<td>30 (41%)</td>
<td>71 (20%)</td>
<td>53 (24%)</td>
<td>44 (63%)</td>
</tr>
<tr>
<td>20-99t</td>
<td>543</td>
<td>130 (39%)</td>
<td>162 (39%)</td>
<td>34 (46%)</td>
<td>110 (31%)</td>
<td>88 (40%)</td>
<td>19 (27%)</td>
</tr>
<tr>
<td>100-499t</td>
<td>277</td>
<td>71 (22%)</td>
<td>61 (15%)</td>
<td>9 (12%)</td>
<td>84 (24%)</td>
<td>46 (21%)</td>
<td>6 (9%)</td>
</tr>
<tr>
<td>500-999t</td>
<td>61</td>
<td>17 (5%)</td>
<td>9 (2%)</td>
<td>-</td>
<td>20 (6%)</td>
<td>15 (7%)</td>
<td>-</td>
</tr>
<tr>
<td>&gt;1000t*</td>
<td>166</td>
<td>41 (12%)</td>
<td>36 (9%)</td>
<td>1 (1%)</td>
<td>69 (19%)</td>
<td>18 (8%)</td>
<td>1 (1%)</td>
</tr>
</tbody>
</table>

*This includes a few for which data were unavailable.


At the other end of the scale, the four largest wine companies in Australia in 2001 — Southcorp, BRL Hardy, Orlando Wyndham and Simeon — were responsible for a grape crush of 881000 tonnes, or just over 60 percent of the national total. The next 16 companies contributed 481000 tonnes or another one third. The remaining 1445 wineries were thus responsible for a mere 6 percent of production — although higher on a value basis. The 20 largest companies owned just under 20 percent of the nation’s vineyards, indicating their dependence on grapes purchased from independent grapegrowers.
2.2 Wine Exports

If the growth of the wine industry in recent years has been impressive, the growth of wine exports has been explosive. As recently as 1984, only 3 percent of Australia’s wine sales were made as exports. In 2001 the comparable figure was 47 percent, and exports will probably overtake domestic sales volumes in 2002.

According to the Australian and New Zealand Wine Directory, the volume of wine exports was:
- 30 Ml in late 1980s;
- 110 Ml in 1995; and

Moreover the unit value had also increased — from around $2.80 per litre between 1988–1994, to $4.50 - $4.60 in 2000 and 2001.

The major markets, by volume and value, are shown in Table 3.

Table 3: Major Australian Wine Export Markets, 2001

<table>
<thead>
<tr>
<th></th>
<th>% By Volume</th>
<th>% By Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>49</td>
<td>43</td>
</tr>
<tr>
<td>United States of America</td>
<td>21</td>
<td>26</td>
</tr>
<tr>
<td>New Zealand</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>Canada</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>Germany</td>
<td>3</td>
<td>3</td>
</tr>
</tbody>
</table>


The UK remains the major export market, Australia now being the number 2 supplier behind France. Sales to the US have been increasing rapidly in recent years, no doubt assisted by attractive exchange rates. Australia exports wine to another 84 international markets — especially in Europe, Asia and the Pacific. Red wine represents just over 60 percent of total exports by value. According to the Wine Directory, 663 wineries are active in export.

2.3 Wine Tourism

One definition of wine tourism is “visitation to vineyards, wineries, wine festivals and wine shows for which grape wine tasting and/or experiencing the attributes of a grape wine region are the prime motivating factors for visitors.”

There are also wider factors involved

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such as the significance of wine tourism to regions in terms of sustainable economic and social development.

The overall value of wine tourism has been assessed at nearly $1 billion annually, of which over $400 million is spent at wineries and another $550 million spent elsewhere by winery visitors.\(^4\)

The demand is likely to grow with more experiential travel and “short breaks,” due to the difficulty of synchronising periods of time away from employment where both partners in a household are working.

Cellar door sales are increasing in importance with winery growth and the difficulty of obtaining retail shelf space and brand awareness. The Victorian Wineries Tourism Council has estimated that two thirds of that State’s wineries depend on cellar door sales for survival.

The main tourism issues for this review are:

- assessing how rapidly and effectively winery businesses are adapting to the requirements of an increasingly sophisticated and competitive market;
- whether regional niches are being fully exploited; and
- whether there is adequate integration between winery businesses, tourism operators, the food sector and government agencies.

The review will also seek to document the assistance currently being provided to the wine tourism industry by various layers of government — such as Austrade, the Australian Tourist Commission (ATC), assistance for the National Wine Centre, various State initiatives and so on.

### 3 Issues for the Review

#### 3.1 Why is the Review Being Conducted?

The review was foreshadowed by the Government during the election campaign last year. In a press statement on 6 November 2001, the Minister for Agriculture, Fisheries and Forestry said that the review:

“would advise on how wine exports and wine tourism can be further promoted to ensure that small and medium sized wine producers in particular share the benefits of the industry’s overall success.”\(^5\)

At the same time the Government announced $450,000 in funding over three years to enable the wine industry to implement a wine tourism strategy. The Government is also currently developing a 10 year national


tourism strategy — in which wine issues can be expected to be discussed. Indeed, this present review will be an input into that strategy.

In his statement announcing that ACIL had been commissioned to undertake the review, Mr Truss said:

“the review will seek to identify additional strategies and actions that individual wine producers, the industry as a whole, and governments can take to promote growth in wine tourism and to increase wine exports.” 6

The Minister referred to “pressures confronting our wine producers in tighter domestic and global wine markets” and added that:

“small to medium wine producers….may not have reaped the same level of benefit as the bigger players from Australia’s explosive wine export growth during the past decade.”

3.2 The Role of Governments

It should not be expected that the review will recommend a large and costly role for Governments — Commonwealth, State or local — to solve each and every problem that exists. The industry hasn’t come this far on the back of government largesse and many — perhaps most — wine businesses would prefer Governments to keep a respectful distance from their day-to-day operations.

To make the case for government intervention to improve efficiency — or the way resources are used in the economy — (in the wine industry, as elsewhere) requires, in the first instance, the demonstration of “market failure.” This means circumstances in which the market, left to its own devices, cannot come up with a set of outcomes which maximises overall efficiency. This is a very simple statement of what in practice is both complex and subjective. But it does serve to remind us that in our type of economy, the operation of markets and freely competing businesses mainly determines what happens. Moreover, intervening to correct some alleged market failure needs great caution:

- the “optimal outcome” can be very much in the eye of the beholder — one person’s market failure is another person’s perfectly predictable and sensible market outcome; and
- market failure may be replaced by even more costly government failure — such as well intentioned but ultimately counter-productive efforts by governments that get in the way of (“crowd out”) existing private sector initiatives, making life harder for all concerned.

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That said, Governments can and do intervene — eg supporting industry efforts in trade policy, providing seed funding for tourism initiatives, providing the legislative underpinning for statutory institutions like the AWBC, funding the work of Austrade and the ATC, providing an institutional structure for compulsory R&D levies on wine grapes, supplementing industry R&D funds, and so on. Is this as far as Governments should go? Should they do more? What — and why? Will there be adverse effects from such action?

More importantly perhaps, there may be areas of existing government intervention impeding business success, such as regulations — at the Commonwealth, State or local levels — which may be misguided or inconsistent. What are they? Should they be reduced or removed? And what beneficial effects would that have?

Another obvious area where Governments intervene is in taxation policy — a subject of considerable angst to the wine industry. However, it should be noted that the Commonwealth Government has specifically confirmed that this review is not an inquiry into the Wine Equalisation Tax. We accept that taxation issues will be raised during the review, but participants should not develop expectations that taxation will feature prominently in the report’s recommendations.

The report will discuss these issues in some detail and set out clearly which areas may justify a role for governments and which should remain the preserve of individual businesses, groups or organisations.

### 3.3 What are Small and Medium Sized Wineries?

Given that this review is to focus on small and medium sized wineries, it is appropriate that these terms be defined. Or is it? Early discussions have stressed that it would be dangerous for different sized wine enterprises to be pitted against each other. All elements of the industry have achieved a great deal to date by cooperating closely. Representatives of small wineries seem comfortable that their larger brethren have paved the way in developing export markets or tourism facilities from which they (the smaller wineries) have derived spin-off benefits. They also point out that without larger companies’ focus on exports, the domestic market would be even more congested than it already is. Are these sentiments shared generally?

There are several ways one can think of small and medium sized wineries. One is quantitatively — in terms of production: say, less than 500 tonnes of grapes (or just under 40000 cases of wine) for a small winery, and less than 1000 tonnes (75000 cases) for a medium sized winery. This definition would capture around 90 percent of the 1465 wineries in Australia. Sometimes a “very small” category is added — less than 50 tonnes; this segment alone represents just over half of all wineries, but obviously a very small proportion of production.
Another definitional approach is in terms of market focus: a medium sized winery being when the business can no longer depend fully on cellar door (or direct-to-restaurant) sales and has to enter the retail market. And a large winery being where the business has to deal with supermarkets, and therefore has to contend with increased marketing and promotion costs, and needs reliable logistics and delivery systems.

A third approach is to apply some form of “genuine business test” — recognising that a number of smaller wineries were not set up with the purpose of being independently viable business ventures — and have little chance of becoming so. Such operations may be more akin to hobby farms or lifestyle investments.

Which of these approaches should this review adopt — and why? Or doesn’t it really matter?

3.4 Improving Profitability

As noted earlier, the ultimate objective of this review is to improve the profitability of small and medium sized wineries through improving their performance in wine tourism and exports. This requires one or both of reducing costs or improving revenue. Improving revenue can in turn result from either increasing the average sale price (or net back to wineries from the sales they make), or lifting the volume sold. In our view it is important to keep these simple truths in mind throughout the review — pursuing “profitless growth” is fairly easy, but pointless.

Obviously cost structures and scale factors between different wineries vary enormously. We intend to develop indicative cost structures in small and medium sized wineries in the report, in part to indicate what is achievable. Some benchmarking analysis is already undertaken. We intend to study this material closely, speak to the authors of the reports, and offer comments on how more value can be obtained from it. We seek suggestions from wine producers and others to this end.

Another way of looking at cost data is to work backwards from the retail price. Our intention is to analyse data of this type — and to identify areas where potential for improved profitability through tourism and exports may lie.

3.5 Areas Where the Review is Seeking Information and Suggestions

The recommendations that might emerge from the review will be directed at several levels. Some might be directed at individual wineries — while recognising that there is no such thing as “one solution for every situation” and that the industry’s diversity is one of its strengths. Others

7 For example, see Deloitte Touche Tohmatsu (2002), “Annual Financial Benchmarking Survey 2001,” a joint project of WFA and DTT.
might be directed at regional groups of wineries acting cooperatively, a
State wide industry group, State Governments, national industry groups
or the Commonwealth Government.

Against that background, the following is a list of questions (in no
particular order or priority) where we seek feedback. The list is by no
means exhaustive — hopefully, it will trigger other ideas. The more
specific the feedback, the more helpful it will be.

- How do/should small and medium sized wineries measure the
  contribution of their exports and tourism sales to overall
  profitability?
- Do cellar door facilities always represent good value for
  wineries? How should their contribution to overall profitability
  be judged? On a stand-alone basis or more broadly? That is,
even if they run at a “loss,” do they add to overall business
  value? How can this (true?) contribution be measured?
- Ditto with winery restaurants — and other tourism infrastructure
  investments (eg eco tourism, craft shops, general merchandising,
  olive pressing, cheese making, bed and breakfast wineries etc).
- How important are wine trails — nationally and regionally? Is
  there enough product diversity and what is needed to make them
  work more effectively — eg more icon regional attractions (if so
  what type), improved infrastructure, better roads? Should they
target domestic tourists or international visitors?
- Should more be done to improve road signage for tourists
  wishing to visit wineries? Do some States perform better in this
  area? What are the obstacles?
- Most car hire company contracts limit driving on non bitumen
  roads (thus in theory preventing such vehicles getting to (most?)
  wineries). Leaving aside whether such provisions are adhered to,
  should they be changed? If so, who should convince the car hire
  companies to be more flexible and how? Similar problems are
  said to have been experienced by small tourism bus companies
  seeking registration.
- Can small and medium sized wineries improve their profitability
  by forming buying cooperatives (eg for bottles and packaging) or
  by pooling their marketing expertise? Are there already
  examples of successful initiatives in this area? What is stopping
  cooperation of this type from developing autonomously? Is there
  a role for Governments here? Why?
- How can regions better exploit their particular advantages? For
  example, it has been said that some French regions have
  distinctive regional logos (as does Hawkes Bay in New Zealand),
a definite wine variety focus and style, and a specific regional
  bottle. Any lessons for Australia?
• What regulatory restrictions (Commonwealth, State or local) most inhibit small and medium sized wineries? Seeking development approval; water; waste water; labelling; occupational health and safety; industrial relations; health, food standards and additives; others? Describe the impact of the regulations and what might be done to alleviate them.

• How does the banking system relate to small and medium sized wineries? Is there hard evidence of additional risk premiums or other restrictions being demanded by banks before lending to wineries/vineyards, simply because of a non metropolitan location?

• Are the linkages between food and wine being exploited sufficiently — at a regional, State or national level? If not, what should be done and how? What does the food industry think of the wine industry and how does it see its role in relation to, and synergies with, wine exports and wine tourism?

• There have been some successful associations between wineries and music and festivals. What lessons can be learnt from these successes? Can/should more be done? If so, how and by whom?

• How successful have the specialised wine shows been in Australia (eg the Canberra Riesling show)? What are the main such shows? Can more be done in this area? Is there a risk of over saturating the market?

• There are a number of specialist wine tour operators offering a variety of wine experiences — for domestic and international tourists, for serious and social wine consumers etc. What more can be done to develop these linkages with wineries or to expand wine sales by such visitors (eg facilitating collection of wines purchased by overseas visitors in their own countries)? Who should take the lead?

• Can a small winery owner be both a successful winemaker and a tourism operator? If not, which is the more important?

• How important are mail order arrangements to small and medium sized wineries? What has been the experience to date with Internet ordering?

• What can be done to expand the domestic wine market? It is said that only 51 percent of people aged over 18 drink wine, whereas for beer the figure is 80 percent and soft drink nearly 100 percent. Can wine match these levels? How? Is the ready-to-drink (RTD) market an answer? Is there a risk that this would compromise the industry’s health and drinking-in-moderation messages?
How important are wine appreciation courses in introducing consumers to wine? Is this service being adequately delivered at present? If not, who should do what about it?

Should we be more actively trialling different types of grape varieties? Is enough R&D being done? Is this a collective or individual responsibility?

Are there significant growth opportunities for “organic wines,” as with organic beef or free range eggs?

What can small and medium sized Australian wineries learn from their counterparts overseas — in New Zealand, the United States, Europe, elsewhere — in terms of wine exports and tourism? What do they do better than us — and why?

Is there an opportunity for specialist businesses (either distributors or retailers) to concentrate on the products of smaller (or newer) wineries? If there is a genuine commercial opportunity here, what is stopping it from emerging?

Should anything be done (and if so by whom) to counter the alleged growing power of larger distributors and retailers?

If the wine industry is entering a period of consolidation (e.g., recent merger and acquisitions in the publicly listed sector), should any adjustment assistance be provided to smaller wineries? If so, on what basis and who should decide (recalling an earlier Commonwealth funded vine pull scheme involving the then out of favour Shiraz variety)?

Should one simply take the view that all current winery owners (especially smaller life-style producers) entered the industry with their eyes open; that no one should be guaranteed a profit and that if there now are problems of over supply or excessive numbers of brands, then the inevitable shake out should be allowed to run its course? In short, is it time for some wine producers to be given a reality check?

Should the AWBC be more active in domestic promotion? Or should its role be confined to export markets?

Are smaller and medium sized wineries comfortable with the work being done on trade policy to enhance overseas market access? If not, what more or different should be done, and by whom?

How big a problem are freight rates (or shipping services more generally) to successful wine exporting? Are freight negotiation arrangements adequate?

How well do AWBC, Austrade, ATC and various State Government agencies perform in promoting wine? How might
their effectiveness be enhanced? What opportunities are there for greater government/industry cooperation?

- Ditto re WFA and other State or regional industry organisations?
- Can smaller wineries really achieve the same export success of larger companies? If so, how, where and why? If not, why not?
- Are the distributional and promotional costs too high? What are the niche success factors? Do the threshold requirements of labelling and certification for overseas markets constitute fact-of-life insurmountable hurdles for smaller wineries? Are these regulatory requirements actually necessary?

## 4 Timetable and Consultations

We intend to be in the following places on the following dates. Regional public meetings will be convened by the relevant wine industry organisation and details conveyed via the local network.

- **Wednesday/Thursday 24/25 July. Adelaide.** Meetings with industry groups and government agencies.
- **Friday 2 August. Sydney.** Meetings with relevant government agencies. Visit Wine Australia.
- **Saturday 3 August. Sydney.** Wine Australia. Public discussion proposed plus one-on-one discussions.
- **Sunday 4 August. Sydney.** Wine Australia. Further one-on-one discussions.
- **Wednesday 7 August. Melbourne.** Meetings with industry groups, government agencies and interested parties.
- **Monday 12 August. Margaret River.** Public meeting. Inspection of facilities.
- **Tuesday 13 August. Perth.** Meeting with government agencies, industry groups and interested parties.
- **Wednesday 14 August. Clare.** Public meeting. Inspection of facilities.
- **Thursday 15 August. Adelaide.** Meeting with interested parties.
- **Monday 19 August. Rutherglen.** Public meeting. Inspection of tourism facilities.
- **Tuesday 20 August. Hunter.** Public meeting. Inspection of facilities.
- **Wednesday 21 August. Brisbane.** Industry meeting. Meeting with government agencies.
- **Thursday 29 August. Hobart.** Public meeting. Meeting with government agencies.